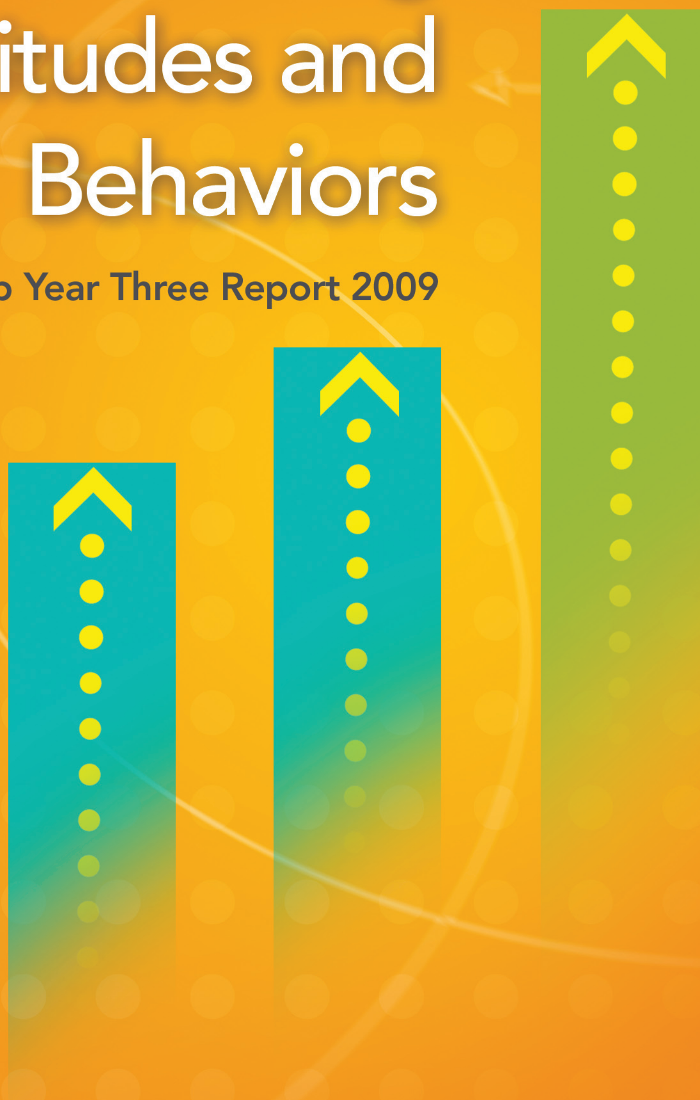
Mature Millennials: Food Retailing Attitudes and Behaviors

The Peck Fellowship Year Three Report 2009



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Mature Millennials: Food Retailing Attitudes and Behaviors

The Peck Fellowship Year Three Report — 2009

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Food Marketing Institute (FMI) conducts programs in public affairs, food safety, research, education and industry relations on behalf of its 1,500 member companies — food retailers and wholesalers — in the United States and around the world. FMI's U.S. members operate approximately 26,000 retail food stores and 14,000 pharmacies. Their combined annual sales volume of $680 billion represents three-quarters of all retail food store sales in the United States. FMI's retail membership is composed of large multi-store chains, regional firms and independent supermarkets. Its international membership includes 200 companies from more than 50 countries. FMI's associate members include the supplier partners of its retail and wholesale members.

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Table of Contents

Introduction

FMI was awarded the Gerald E. Peck Fellowship in 2006 and partnered with the Food Marketing department of Saint Joseph's University to conduct a three-year research project regarding food wholesaling. Richard J. George, Ph.D., professor of food marketing, was selected as the Gerald E. Peck Fellow. This research project consists of three parts, these are:

- Year 1 — Past and Present Landscape
- Year 2 — Independent Operator Insights into Wholesaler Relations and Services
- Year 3 — Mature Millennials: Food Shopping Attitudes and Behaviors.

Year Three's research, described herein, is an attempt to better understand the older members of Generation Y, which have been labeled as the Mature Millennials. In particular, food retailers need to understand the lifestyles, food eating behaviors, as well as the food shopping attitudes and behaviors of this population that will rival the Baby Boomers in terms of the scope and depth of their influence on American food retailing.

Specifically, the study collected the following information:

- Meal and snack consumption (weekday v weekend)
- Source of meals and snacks (weekday v weekend)
- Food shopping alternatives
- Food shopping frequency
- Food shopping spending
- Food shopping importance factors
- Food shopping/eating psychology

Methodology

To date, Generation Y has been studied extensively and is the topic of a number of publications. However, as noted previously, there is no publicly available research that describes in-depth their attitudes and behaviors toward food retailing. In particular, the food shopping attitudes and behaviors of the older members of Generation Y is unknown.

The survey instrument was a questionnaire that was administered via the Internet (Survey Monkey) to members of Generation Y age 23 to 32. Data was collected during the month of March 2009. The national random sample size was 356.

An In-Depth look at Mature Millennials

Volumes have been written about Generation Y: their characteristics and beliefs, their defining life experiences and life events, the impact of technology on them, and their impact on the workforce. However, no data is available publicly that addresses in detail the food retailing attitudes and behaviors of the older members of this generation, namely, the Mature Millennials. Because of their unprecedented size, spending power, and reliance on food service, this generation has the potential to give birth to tomorrow's industry trends and consequently alter the food retailing industry as it exists today. It is critical that the food retailing industry understand what is important to them in terms of food service and what drives their behavior.

Definition of Generation Y

Age, lifestyle and life stage all influence food retail attitudes and behaviors. Age demographics are most easily understood in the context of generations, which combine collective traits or behaviors that exist among people of each age group. Generation Y can be roughly defined as the group of individuals born between the years 1977 and 1994 (15 to 32 years of age). Called by several different names such as the Millennials, the Digital Generation, and Echo Boomers, this generation is one that is quickly establishing a strong identity as a consumer in today's ever changing marketplace. This is the largest generation (80 million) with an estimated spending power of $625 billion. When viewed in comparison to the two previous generations, the Baby Boomers and Generation X, there is a clear split between the preferences of Generation Y and these other generations. Generation Y represents the largest population bulge since the baby boomers. It is also the most ethnically diverse generation in the U.S., with 38 percent identifying themselves as non-white.

Mature Millennials

The attitudes and behaviors of older members of Generation Y (hereafter referred to as the Mature Millennials; 23 to 32 years of age) have been found to differ significantly from the younger members of this generation (Technomic 2008). In particular, the older Millennials are past the formal education state of their lives, in the midst of starting careers, earning their own incomes, forming households, relationships, and families.

This generation is demographically different with tastes to match – a high interest in ethnic foods (more than any other group) and organic foods. However, this "generation on the go" eats fewer meals at home than any other group tracked by Food Marketing Institute in its annual *U.S. Grocery Shopper Trends* report. Overall, the Millennials eat out an average of 24 times per month. This is largely due to having grown up in households where eating out was much more prevalent. They are interested in eating healthier, even though much of their eating out is concentrated in quick-casual restaurants like Panera Bread and Baja Fresh (Technomic 2008).

According to the U.S. Department of Agriculture, the average U.S. consumer spent 9.8 percent of disposable personal income (income available after taxes) on all food in 2007—5.7 percent on food at home and 4.1 percent on food away from home (USDA 2008). The most recent Consumer Expenditure Survey from the Department of Labor indicates that almost 13 percent (12.6%) of all household expenditures are for food, with 7.1 percent for food at home and 5.5 percent for food away from home. However, when considering households less than 25 years of age the average expenditure for all foods is 13.9 percent with 6.9 percent for food at home and 7.0 percent for food away from home. Households between 25 and 34 years of age were closer to the national average for total food purchases (12.8%) but spent less for food at home (6.7%) and more for food away from home (6.1%). For the average household, food spending is the third largest category, following housing and transportation (BLS 2007).

Exploring consumer behavior by generational groups offers new perspectives about what drives the decisions that consumers make in the food service marketplace. Understanding these consumers is critical as they will represent a significant amount of food retailing spending in the United States. Purchasing preferences within this generation vary due to life stage and a multitude of other factors. As with any generation, it is not homogeneous. In order for the grocery/food retailing industry to enhance its offerings and broaden strategic planning, it must not only target this emerging generation, but also target more refined consumer segments within this group. This research will be useful for subsequent studies of Generation Y by identifying current consumer need states and then observing how these particular consumers' needs and preferences change as they go through various life stages.

Mature Millennials Meal and Snack Consumption

Weekdays Versus Weekends Meal and Snack Consumption

Approximately, three quarters of the respondents eat breakfast during the week with slightly less eating breakfast on the weekends (approximately two-thirds eat breakfast on the weekend). Almost nine in 10 eat lunch during the week with slightly less eating lunch on the weekend. Almost everyone indicated that they eat dinner daily.

In terms of snack consumption, approximately seven in 10 eat snacks on a daily basis during the week and slightly less (approximately two-thirds) eat snacks on weekends. Like daily meals, there was little snack consumption differentiation by day of the week (Monday through Friday and Saturday versus Sunday). Respondents indicated that on average they consumed one to two snacks per day.

Weekday: Meals & Snacks Consumed	**Monday** %	**Tuesday** %	**Wednesday** %	**Thursday** %	**Friday** %	**Average** %
Breakfast	76.3	74.6	76.3	74.8	75.2	75.4
Lunch	90.4	90.7	91.0	90.4	89.0	90.3
Dinner	97.5	97.2	97.5	96.9	96.1	97.0
Snacks	72.2	73.2	72.2	71.7	74.2	72.7

Weekend: Meals & Snacks Consumed	**Saturday** %	**Sunday** %	**Average** %
Breakfast	68.3	66.5	67.4
Lunch	85.7	83.1	84.4
Dinner	97.2	96.1	96.7
Snacks	64.9	67.0	66.0

While more than nine in 10 Mature Millennials regularly eat lunch or dinner, breakfast is not regularly eaten by one quarter of the group. Even fewer eat breakfast on weekends. However, the group strongly believes that they should eat a healthy breakfast each day. Since over 85 percent of this generation source breakfast from grocery stores or supermarkets, stimulating primary demand for breakfast could translate into a breakfast sales growth opportunity for retailers.

Meal and Snack Source

In terms of the source of the meals and snacks, 85.4 percent of the respondents indicated that they prepared breakfast from ingredients purchased from a grocery store or supermarket. Lunch from supermarket ingredients is significantly less than breakfast with about two-thirds (65.4%) of the respondents sourcing from grocery stores or supermarkets. While the average number of dinners sourced from a grocery store or supermarket is comparable to lunch, there are significant differences based on the day of the week. Monday through Thursday, supermarket ingredients are the source for over 70 percent of dinners. On Friday and Saturday, this number decreases to a low of 50 percent. However, Sunday's sourcing is closer to that observed during the week, namely 70.1 percent from supermarket ingredients. Snack sourcing appears to mimic breakfast in that approximately 85 percent of the respondents indicated that they prepared a snack from ingredients purchased from a grocery store or supermarket.

Weekday Meals & Snacks Sourced From Grocery Stores or Supermarkets	**Monday** %	**Tuesday** %	**Wednesday** %	**Thursday** %	**Friday** %	**Average** %
Breakfast	88.6	83.4	82.7	86.5	85.5	85.4
Lunch	72.1	61.9	64.7	66.6	62.1	65.5
Dinner	79.4	72.3	71.3	70.9	53.1	69.4
Snacks	86.8	82.2	81.5	88.4	81.1	84.0

Weekend: Meals & Snacks Sourced From Grocery Stores or Supermarkets	**Saturday** %	**Sunday** %	**Average** %
Breakfast	83.5	84.0	83.8
Lunch	62.3	68.4	65.4
Dinner	52.9	70.1	61.5
Snacks	86.8	84.2	85.5

Eating at a restaurant/food service establishment or ordering meals for pickup or delivery were the next most prevalent sources for 20 to 47 percent of all lunches and dinners coming from this source. Slightly more than one third of respondents sourced lunch daily via restaurants/food service establishments/pickup/delivery. Dinner sourcing via the above noted food service options averaged approximately 25 percent from Sunday through Thursday. On Friday and Saturday, these sources increased to almost 50 percent.

Weekday Meals & Snacks Sourced From Restaurants/ Food Service/ Pickup/Delivery	**Monday** %	**Tuesday** %	**Wednesday** %	**Thursday** %	**Friday** %	**Average** %
Breakfast	10.6	15.5	15.9	13.1	13.8	13.8
Lunch	27.9	37.8	35.3	33.1	37.9	34.4
Dinner	20.3	27.7	28.7	28.8	46.9	30.5
Snacks	3.1	6.4	5.8	4.6	9.5	5.9

Weekend: Meals & Snacks Sourced From Restaurants/ Food Service/ Pickup/Delivery	Saturday %	Sunday %	Average %
Breakfast	15.7	15.6	15.6
Lunch	37.4	31.6	34.5
Dinner	47.1	29.9	38.5
Snacks	11.6	10.4	11.0

Sourcing via a vending machine or kiosk for breakfast, lunch or dinner is a rare occurrence (less than 1%). On the other hand, slightly more than one in ten (10.1%) respondents sourced snacks from a vending machine during the week, less on Sunday (5.4%) and almost none (1.6%) on Saturday.

Given that more than four in five of the Mature Millennials (in this survey) work outside the home (full or part time) the efforts by food retailers to attract additional lunch business particularly during the work week may not be cost effective. However, dinner is another story. Monday through Thursday represent an opportunity to take share from food service. Almost 30 percent of this group sources dinner from food service. A featured and promoted, fully or easily prepared, meal from a grocery store or supermarket would not only increase basket size and margin, it could also increase food retailing visits.

Mature Millennials Grocery Shopping Behavior and Attitudes

Grocery Store Types and Visits

Nearly 100 percent (96.3%) have shopped at a regular full-service supermarket for groceries in the past 30 days. Almost half (45.1%) visited once in the past week, another three in 10 (31.5%) visited twice in the past week, with the balance (23.4%) visiting three or more times in the past week.

In the past 30 days, about half (50.3%) of the Mature Millennials shopped at supercenters for groceries. Of those shoppers, Almost two-thirds (63.6%) visited once in the past week, another one in five (18.5%) visited twice in the past week, with the balance (17.9%) visiting three or more times in the past week.

Like supercenters, convenience stores were shopped for groceries in the past 30 days by about half (49.7%) of the Mature Millennials. Of those shopping at convenience stores for groceries, slightly more than half (50.6%) visited once in the past week, another quarter (23.5%) visited twice in the past week, with the balance (25.9%) visiting three or more times in the past week.

Of the remaining types of stores, only drugstores and warehouse club stores were shopped for groceries by at least one third of the Mature Millennials in the past thirty days (drug stores = 40.2% and warehouse club stores = 36.2%). Both of these formats had similar visitation patterns. Of those shopping at drug stores for groceries, slightly more than seven in 10 (70.8%) visited once in the past week, another one in five (19.2%) visited twice in the past week, with the balance (10%) visiting three or more times in the past week.

Of those shopping at warehouse club stores for groceries, more than three quarters (77.7%) visited once in the past week, another one in six (17.9%) visited twice in the past week, with the balance (4.4%) visiting three or more times in the past week. One in eight (13.7%) Mature Millennials indicated that they shopped for groceries via the Internet (Amazon or supermarket website) in the past 30 days. Of those shopping the Internet for groceries, slightly more than half (57.4%) visited once in the past week, another one in seven (14.8%) visited twice in the past week, with the balance (27.8%) visiting three or more times in the past week.

In addition a large minority of the Mature Millennials shop non-traditional food retailers such as discount stores (23.5%), dollar stores (20.3%), natural and organic stores (18.8%).

Grocery Shopping Past 30 Days & Visits Past Week	Shopped	Number of Visits		
	Past 30 Days %	1 Time %	2 Times %	3 or More %
Regular Full-Service Supermarket	96.3	45.1	31.5	23.4
Supercenter	50.3	63.6	18.5	17.9
Convenience Store	49.7	50.6	23.5	25.9
Drug Store	40.2	70.8	19.2	10.0
Warehouse Club Store	36.2	77.7	17.9	4.4
Discount Store	23.5	71.3	16.3	12.4
Dollar Store	20.3	76.1	12.7	11.2
Natural & Organic Store	18.8	83.3	10.6	6.1
Internet/ Online (e.g., Amazon or Supermarket websites)	13.7	57.4	14.8	27.8
Specialty Food Store	10.8	76.9	15.4	7.7
Ethnic Store	8.7	77.4	12.9	9.7

A potential opportunity or threat for traditional food retailers comes from Internet/Online food shopping. While only 4 percent of older shoppers purchase groceries online (*U.S. Grocery Shopper Trends 2009,* FMI), almost 14 percent of Mature Millennials have shopped for groceries online in the past thirty days. How user friendly, useful, and shoppable is your website? If these younger consumers are shopping on Amazon.com this represents real lost business for the traditional food retailer. However, even if online food shopping is conducted via a supermarket website, this takes away from visits to the store with the potential loss of higher margin impulse purchases. This issue needs to be addressed regardless of shopper age but especially so for the Mature Millennials.

Also, note that large numbers of this generation have shopped for groceries at non-traditional food retailers during the past thirty days. These statistics indicate that other formats are shopped by even more Mature Millennials than the above subset shopping online. While Amazon.com represents a high-tech threat, traditional food retailers need to develop strategies to address the low-tech options like drugstores, warehouse club stores, discount stores, dollar stores, natural and organic stores.

Grocery Spending

Nearly one third (32.6%) of Mature Millennial families spent more than $100 on groceries during the past week. More than half (52.5%) spent more than $80 on groceries during the past week. When focusing on prepared foods, not including groceries, the largest number of Mature Millennial families (30.1%) spent $40 or less for food eaten in restaurants, ordered for pickup or delivery. However, more than 40 percent (41%) spent $60 or more for food eaten in restaurants, ordered for pickup or delivery.

Grocery & Restaurant/Food Service (FS) Food Expenditures for the Past Week	Grocery %	Restaurant/ FS %
$0-$40	9.3	30.1
$41-$60	18.5	28.9
$61-$80	19.7	17.1
$81-$100	19.9	12.1
$101 & over	32.6	11.8

Primary Grocery Store Attributes

When it comes to the importance of features when selecting one's primary grocery store, this generation's ratings mimicked those of the rest of the population, namely, low prices, quality, clean and uncluttered, convenient location, fast checkout, friendly employees, accuracy, use before/sell by dates marked on packages, easy to shop layout, etc. Nothing new here except to underscore that the next big generation of shoppers is looking for the same in-store experience as their parents. Successful food retailers will need to deliver this experience consistently.

Attribute Importance for Primary Grocery store Selection (1-5 Scale)	Mean Rating
Low prices	4.4
Items on sale or money-saving specials	4.4
High-quality fruits and vegetables	4.3
Convenient location	4.2
"Use before/ Sell by" dates marked on products	4.2
High-quality meat	4.2
Clean, neat store	4.2
Fast checkout	4.2
Accurate shelf tags	4.1
Store layout that makes it easy to shop	4.0
Courteous, friendly employees	4.0
Personal safety outside the store	3.9
Fresh food deli or delicatessen	3.6
A frequent shopper program or savings club	3.6
Private label or store brands	3.5
Nutrition and health information available for shoppers	3.4
Offers locally grown produce or other local packaged foods	3.3
Self-checkout	3.3
Attention to special requests or needs	3.2
The store's recycling/sustainability efforts, practices	3.1
Natural/ Organic products	3.1
Exciting store environment to browse for new ideas	3.0
Good selection of ethnic or cultural foods	2.9
Community involvement (i.e., sponsorship of local events, food bank activity, etc.)	2.9
Pharmacy	2.7
Online buying service	2.1

Mature Millennials Lifestyle and Social Networks

Lifestyle Choices

When it comes to lifestyles the Mature Millennials represent a potential gold mine for food retailers. More than half of this group visit a supermarket at least twice a week and nearly one quarter visit three or more times per week. In addition, this group highly values lifestyles that are conducive to behaviors that support grocery shopping. They strongly agree that cooking meals at home is a good way to live, that it is important to eat healthy these days and pay attention to nutrition, that they should eat a healthy breakfast each day, that they enjoy cooking, and to plan dinners that will be prepared at home ahead of time. Food retailers need to develop strategies that address these strongly held values and engage in an aggressive communications campaign that informs/persuades the Mature Millennials that their local grocery store or supermarket can help them live the lifestyle they seek. Since this group regularly makes a shopping list before visiting the supermarket, providing shoppers access to electronic shopping lists that highlight these lifestyle desires and values would be beneficial.

Lifestyle Agreement Attributes (1-5 Scale)	Mean Rating
Cooking meals at home is a good way to live	4.3
It is important to eat healthy these days and pay attention to nutrition	4.1
I like to try new restaurants	4.1
I believe I should eat a healthy breakfast each day	3.9
I enjoy cooking	3.9
I regularly make a shopping list before I visit the supermarket	3.8
It is important to try different types of food	3.8
It is best to plan dinners that will be prepared at home ahead of time	3.8
If I am pressed for time, I will likely choose a meal that is convenient over one that is healthy and less convenient	3.7
Two hours before dinner time I usually know if I’m cooking or eating out	3.7
Eating fast food is usually a bad idea	3.7
Sharing my favorite foods with others gives me a lot of satisfaction	3.7
I often talk about restaurants with friends/colleagues	3.6
I actively seek out nutritious foods that are good for me	3.5
For the majority of my meals, I have time to sit and enjoy them	3.5
I enjoy talking about food with friends/colleagues	3.5
I more frequently cook with fresh food than canned or frozen foods	3.5
Supermarkets are a good source of new food ideas	3.5
Two hours before dinner time I usually know what I am having for dinner that evening	3.4
Organic foods are healthier	3.3
I visit restaurant Internet sites	3.3
I constantly try to multi-task – eat meals while doing other activities	3.3
I regularly exercise at least 3 days a week	3.2
I like to visit new supermarkets	3.1
I regularly watch the Food Network/cooking television shows	3.1

I visit Internet sites that focus on cooking and meal preparation	3.0
Often I have no choice but to eat meals on the run	3.0
I don't pay much attention to my intake of calories	2.9
I like to buy new and unfamiliar foods at the grocery store	2.9
I don't pay much attention to my intake of fat	2.8
I often talk about supermarkets with friends/colleagues	2.8
I prefer picking up quick meals to cooking meals	2.8
It is better to stick with a food that I know than to try something new	2.7
I don't allow "junk food" in my home	2.3
I visit supermarket Internet sites	2.3
The majority of my meals I eat are prepared at a restaurant (either consumed at a restaurant or taken to go)	2.3
I visit Internet sites like Facebook, MySpace, Twitter, etc. to get restaurant reviews and recommendations	2.1
I visit Internet sites like Facebook, MySpace, Twitter, etc. to get recommendations/suggestions for meals	2.0
I regularly purchase food online	1.6

Also, the fact that this group of consumers likes to try new restaurants and different types of foods, suggest a variety-seeking mentality that can be addressed by highlighting new and different foods either in ingredient or prepared form. For example, partnering with a new restaurant by profiling a signature meal and offering the ingredients at the supermarket will send a signal to this generation that innovative foods and meals can be sourced from their favorite grocery store.

Social Network Choices

When it comes to social networks more than three quarters of the respondents (77.2%) participate in social networks. Almost two thirds (63.4%) are members of Facebook and almost half (46.6%) are members of MySpace. Most members appear to participate for social reasons, however there is a minority who use these networks for professional reasons, e.g., complain about faulty products or bad service, get advice on products or services or find a job.

Social Networks Participation	**Response %**
Facebook	63.4
MySpace	46.6
LinkedIn	16.8
Twitter	8.8
Do not participate	22.7

Use of Social Networks	**Response %**
Keep in touch with family and friends	96.1
Share pictures	61.9
Develop new relationships	26.0
Complain about faulty products or bad service	11.4
Get advice on products or services	10.7
Find a job	8.2

Although this generation primarily uses social networks for their intended purpose, namely, to stay connected with family and friends; the professional uses represent a real opportunity for food retailers. Food retailers can use these websites to recruit the best and brightest. Mature Millennials are using these sites to find information about products, services, and the companies offering these products/services for sale. Also, these sites act as an instant messenger for disseminating tales of dissatisfaction and attempted complaint resolutions. In essence, the Internet, in general, and these social networks, in particular, have allowed every user to engage in “best practices sharing” when it comes to buying goods and/or services. The “wired” food retailer who monitors these sites is in the position to strengthen and in many cases, to develop a relationship as a caring, responsive marketer.

Mature Millennials may eventually behave like their parents and older consumers. However, at this stage of their life cycle their attitudes and lifestyles are sufficiently unique to suggest the development of specific marketing strategies and tactics by food retailers that will capture a greater share of their total food needs. Their sheer numbers represent untapped potential if we can get them to perceive “your supermarket as their supermarket.”

FMI Research and Benchmarking Resources

FMI is the premier source for market intelligence on the food retailing industry. Retailers, wholesalers, manufacturers, consultants and government officials are just some of the readers benefiting from FMI's comprehensive research materials on a wide variety of topics. The reports offer useful insights into the realities of the marketplace as well as the minds of the consumer, and provide the tools to make solid business decisions that ultimately help grow profitability, manage risk and achieve competitive advantages.

Annual Reports:

- U.S. Grocery Shopper Trends BESTSELLER
  Shopper attitudes and behaviors as they impact and relate to the grocery store

- The Food Retailing Industry Speaks BESTSELLER
  Comprehensive annual review of the food retailing industry

- Annual Financial Review
  Key financial ratios and trends for benchmarking performance

- The Power of Meat
  An in-depth look at meat through the shoppers' eyes

- Supermarket Pharmacy Trends
  Key pharmacy trends including financial, staffing and operational statistics

- Facts About Store Development
  Trends in new store construction, remodels and closures

- Security and Loss Prevention Study
  Benchmarks for security and loss prevention programs in U.S. supermarkets

- Management Compensation Study for Retailers and Wholesalers
  Compensation and benefits statistics for more than 70 key management positions

- Shopping for Health
  A practical understanding of how health and nutritional concerns influence grocery purchases

- Distribution Center Benchmarks
  Comprehensive overview and benchmarks for operating a food distribution center

- Transportation Benchmarks
  Key benchmarks for food retailer and wholesaler transportation and fleet management

Miscellaneous Recent Studies

- Food Retailing Technology Benchmarks 2008
  Overview of the use and expansion of technology in U.S. supermarkets

- The Past and Present Landscape of Food Wholesaling 2007
  Overview of food distributors in the United States

- El Mercado 2005
  In-depth study of U.S. Hispanic grocery shopping preferences and attitudes

Free Resources

- Grocery Shopping: Who, Where and When
- Food Retailer Contributions to Consumer Health and Wellness 2008
- Running on Fumes 2008
- Improving Supply Chain Practices for Open-Dated Products 2008
- A Comprehensive Guide to Retail Out-of-Stock Reduction in the Fast-Moving Consumer Goods Industry 2007
- Sustainability and Recycling in the Food Industry 2007
- 2016 Future Value Chain
- 2006 Unsaleables Benchmark Report
- 2006 Synchronization Report

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