



FOOD & NUTRITION COMMUNICATIONS: THE PRIVATE SECTOR PERSPECTIVE

Adelaide Feuer, RDN
Edelman



WHAT WE'LL DISCUSS TODAY

- ▶ [A little] About me
- ▶ [More] About Edelman
- ▶ Our approach to communications marketing
- ▶ Our work



DISCLOSURES

Employee of Edelman public relations; supporting clients including:

- ▶ Barilla
- ▶ Unilever
- ▶ GoGo squeeZ
- ▶ Church& Dwight (vitafusion & L'il Critters)
- ▶ Dairy Management Inc / National Dairy Council



ABOUT
DANIEL J. EDELMAN, INC.

A photograph of two men in business suits standing in front of a large digital display. The man on the left is pointing at the screen, while the man on the right is smiling and looking at the screen. The screen displays a world map and a diamond-shaped graphic with four smaller diamonds inside. The text "LEADERSHIP AND INDEPENDENCE" is overlaid on the image in white, bold, uppercase letters. Below the text is a horizontal line with a diamond shape in the center.

LEADERSHIP AND INDEPENDENCE

WHAT WE DO



**EARNED
+ SOCIAL**



**RESEARCH
+ ANALYTICS**



**CORPORATE
REPUTATION**



**CREATIVE
DEVELOPMENT
+ PRODUCTION**



EXPERIENTIAL



**INFLUENCER
MARKETING
+ ADVOCACY**



**SPONSORED,
PARTNERSHIP
+ PAID**



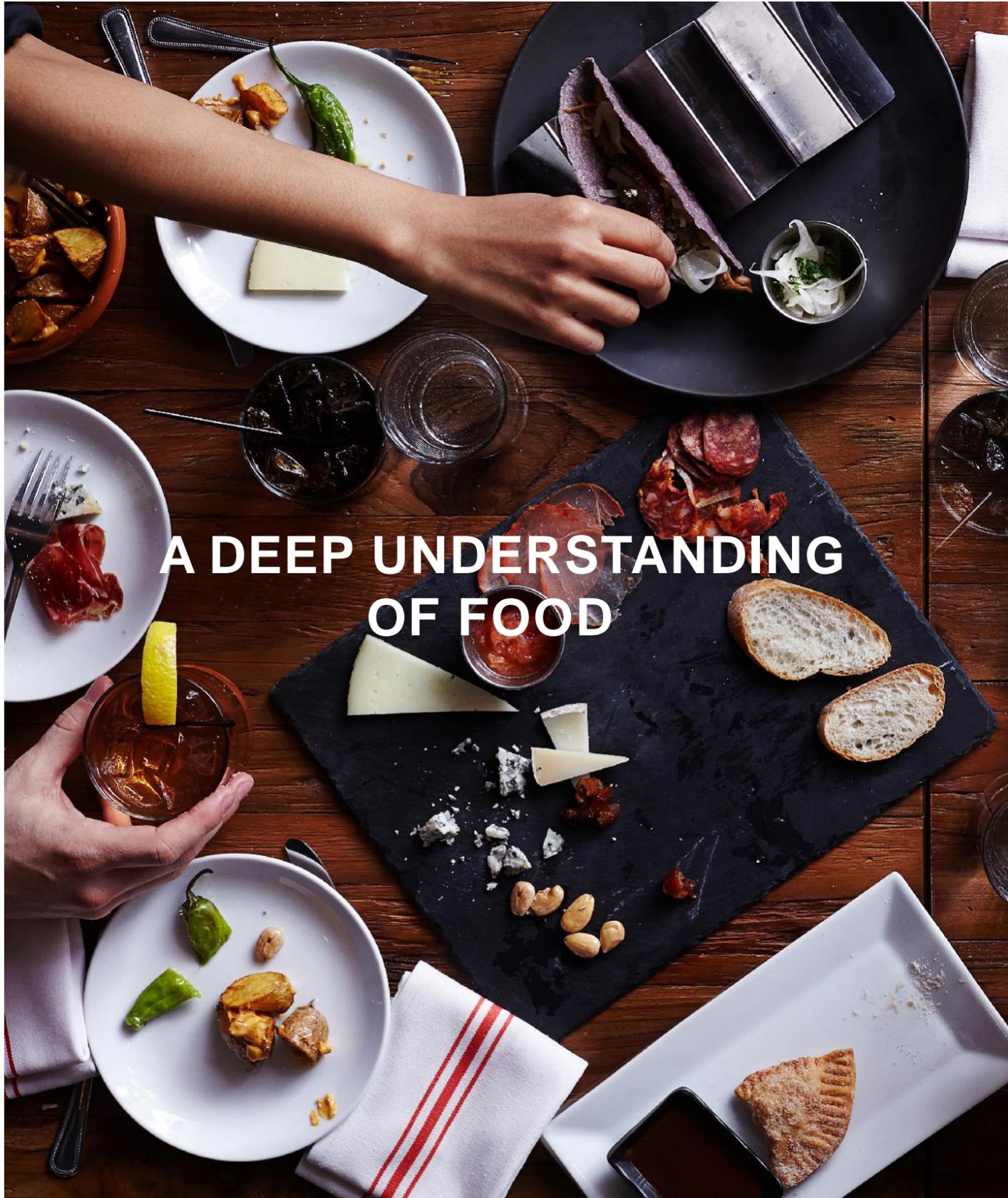
**CONTENT
MARKETING**



**BUSINESS
+ SOCIAL
PURPOSE**



**BRAND
PROTECTION
+ CRISIS**



**A DEEP UNDERSTANDING
OF FOOD**

400+ food & beverage experts,

including registered dietitians, nutritionists, health care professionals and consumer engagement specialists

-  Restaurants and Retail
-  Grocery
-  Alcohol and Spirits
-  Food Manufacturers and Packaged Goods
-  Commodities and Food Service
-  Farming, Fishery and Agribusiness



OUR APPROACH

COMMUNICATION MARKETING

YOU CAN'T DEMAND ATTENTION,
YOU HAVE TO **EARN IT**

We help our clients lead by looking ahead, making bold moves **fueled by insights and deep understanding of strategic trends.** We then adapt the strategy to meet the needs of the marketplace and transform the industry, tied into creative ideas that drive behaviors.



WE INVEST IN INSIGHTS TO MAKE OUR CLIENTS' CAMPAIGNS SMARTER



Trust Barometer

69% of consumers say that the food and beverage industry should have a say in their country's nutrition policy. However, 51% say there is not enough regulation around the industry. The "swing trusters" remain up for grabs.



Brandshare

68% of consumers say they want food brands to communicate openly and transparently about how products are sourced and made. Only 21% believe food brands are doing that well.



Earned Brand

Disruptive innovation is here to stay. People all around the world love innovation, but they are scared about its pace. This is a unique study of its kind with consumers from across the globe exploring their real feelings about innovation and new relationships with brands.





Field to Fork

50% say that the foods they eat reflect their values;
70% say they'd change their consumption habits if it
made the world better.



Modern Family

68% of parents say that children influence
family purchasing decisions.



America's Kitchens

More than 50 percent of two-parent households
reported that they share the food planning and
purchasing responsibilities – everything from making
the list to budgeting.





WE MUST CONSTANTLY INVESTIGATE “WHAT’S NEXT”

It’s easy to get caught up in the moment as brands fight for relevance in this ‘publishers and platforms’ landscape. But we believe that to retain influence, brands must strive to know what’s around the corner, evolving ahead of the curve to address tomorrow’s challenges and delight consumers before the competition.

We invest in robust research and publish our own intelligence, making what we find available to clients to enrich their work and our partnerships. The trends that we identify help us – and you – create engagement that is not only relevant, but purposeful, driving the conversation and continuously earning your license to lead.

For 2016, we assembled 16 key trends fueled by our deep knowledge of food, beverage, consumer behavior and digital marketing that we believe will drive the food and beverage industry that tackle everything from nutrition and policy to consumer-driven movements.

How we see the world: KEY GLOBAL FOOD TRENDS

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**YOU HAVE A GREAT STORY.
WHAT'S NEXT?**



OUR WORK

A close-up, high-speed photograph of water boiling in a pot. The water is turbulent with many bubbles. Several pieces of yellow, ridged pasta are visible, partially submerged and surrounded by the boiling water. The background is a soft, out-of-focus grey.

WHILE THE
**WATER
BOILS**
دست







THANK YOU!



FOOD &
BEVERAGE
TRENDS



01



Authenticity: The New Essential Ingredient

Authenticity is the new transparency. For the industry, it's not about what they say; it's about what they do – or don't do. The food and beverage industry is being held accountable for its commitments like never before on everything from production methods to sourcing, third-party certification, product renovation and financial investments. And if they don't walk the walk? Consumers will walk away.



The European Parliament rejected a draft law in October 2015 that would give individual European countries scope to ban imports of GMO food and animal feed, potentially killing an initiative that was greeted with widespread criticism and much controversy.



02



Insect Interest

The word 'entomography' could be rolling off the tip of your tongue in the next 12-18 months. With increased pressure on the world's food supply, consumers and chefs are more and more open to exploring new nutrition sources – and discovering what 80% of the world's countries already know. Edible insects offer the potential to stand out both as an environmentally-friendly source of food and an adventuresome dish for adventurous foodies.



In the last year, several insect products have appeared in the Western market. One Dutch artist turns insects into a luxury candy.



03



Climate Change Drives Consumer Concern

Erratic weather, altered harvest seasons and record storms are negatively impacting global food production, and consumers are starting to understand how climate change will alter our food supply. Consumers' growing knowledge is leading to an expectation that industry change its behavior – and the realization that they need to change their own.



Excessive downpours in Brazil due to El Niño have reduced the amount of sweetener that can be extracted from cane.



04



Tech Talk

From 3D food to virtual reality and “wearables,” technology is revolutionizing the food and beverage industry, changing where ingredients come from, evolving production methods, altering the way food looks and tastes, and empowering consumers to know more about what they consume and the implications of their food and beverage choices.



A 3D Pasta Printer is in development by Barilla, an Italian company steeped in heritage.*

**Edelman client*



05



Waste Not, Want Not

With the scarcity of food resources now and in the future, food waste is a social and political cause that makes ugly foods appetizing, expiration dates debatable and leftovers look likely.



A "Landfill" salad made from food scraps was served to global dignitaries at the UN lunch in NYC in September 2015.



06

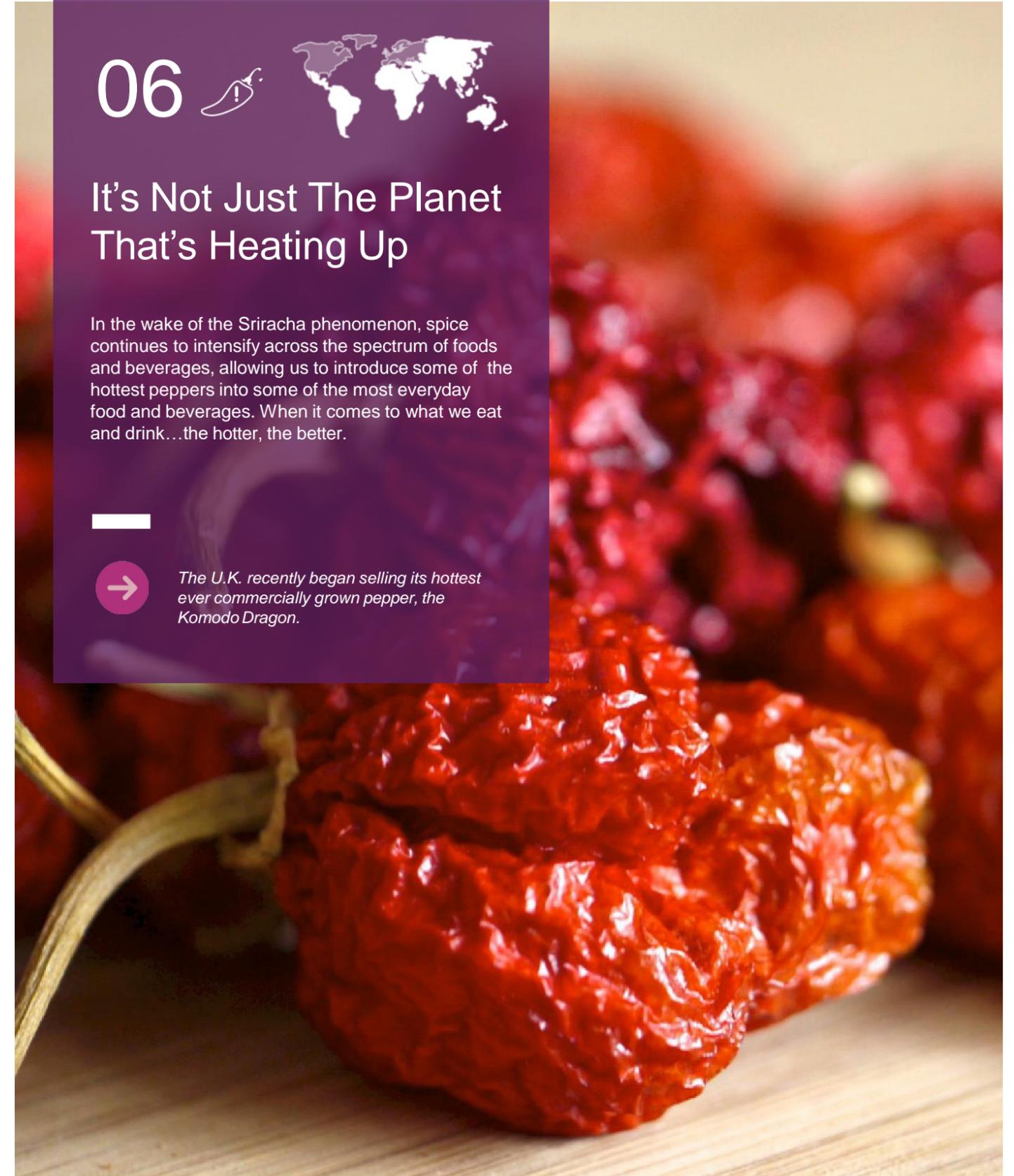


It's Not Just The Planet That's Heating Up

In the wake of the Sriracha phenomenon, spice continues to intensify across the spectrum of foods and beverages, allowing us to introduce some of the hottest peppers into some of the most everyday food and beverages. When it comes to what we eat and drink...the hotter, the better.



The U.K. recently began selling its hottest ever commercially grown pepper, the Komodo Dragon.



07



Gourmet For All

Accustomed to unprecedented access to global flavors and experiences, today's consumers want their cheese to be artisanal, their beer to be craft and their bread to be oven-fresh whenever the mood hits them. But they also don't need to go to a fancy restaurant or upscale retailer to get it. The foodie experience? It's now for everyone.



Half of Paris' 20 arrondissements have now provided spaces for food trucks.



08



Big Food: Big Expectations

In a fiercely competitive global marketplace, legacy brands and the companies that make them are under unprecedented scrutiny. As a result, food and beverage companies are being forced to self-regulate, engage in ways that resonate, and innovate and renovate like never before.



The importance of supply chain transparency has impacted the food industry worldwide, as top suppliers like Nestlé*, Tyson, Cargill, Smithfield, Starbucks*, Aramark, McDonald's and more have released requirements to improve their supply chains.

**Edelman client*



09



Age of the Recipe Hack

There is a renewed focus on the art and science of cooking. However, how we define “homemade” is changing and foodies don’t mind using a few short-cuts to get to their home cooked meal.



International editions of “MasterChef Junior”—some aiming to reach kids as young as 4 years old—already are on the air or in the works in 18 countries, including Thailand, India, the U.K. and Denmark.



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Demand for Delivery

The sustained growth and popularity of food delivery, in the form of order-and-pay apps, third-party online ordering and delivery services, allows consumers to get what they want, whenever they want it, presenting an opportunity for companies to test all types of delivery concepts. The rise of delivery firmly ensconces food and beverage into our global sharing economy.



In the face of China’s weakening economy, diners are turning to apps for meal delivery deals, resulting in a surge of startups and a dizzying array of delivery options for consumers.



11



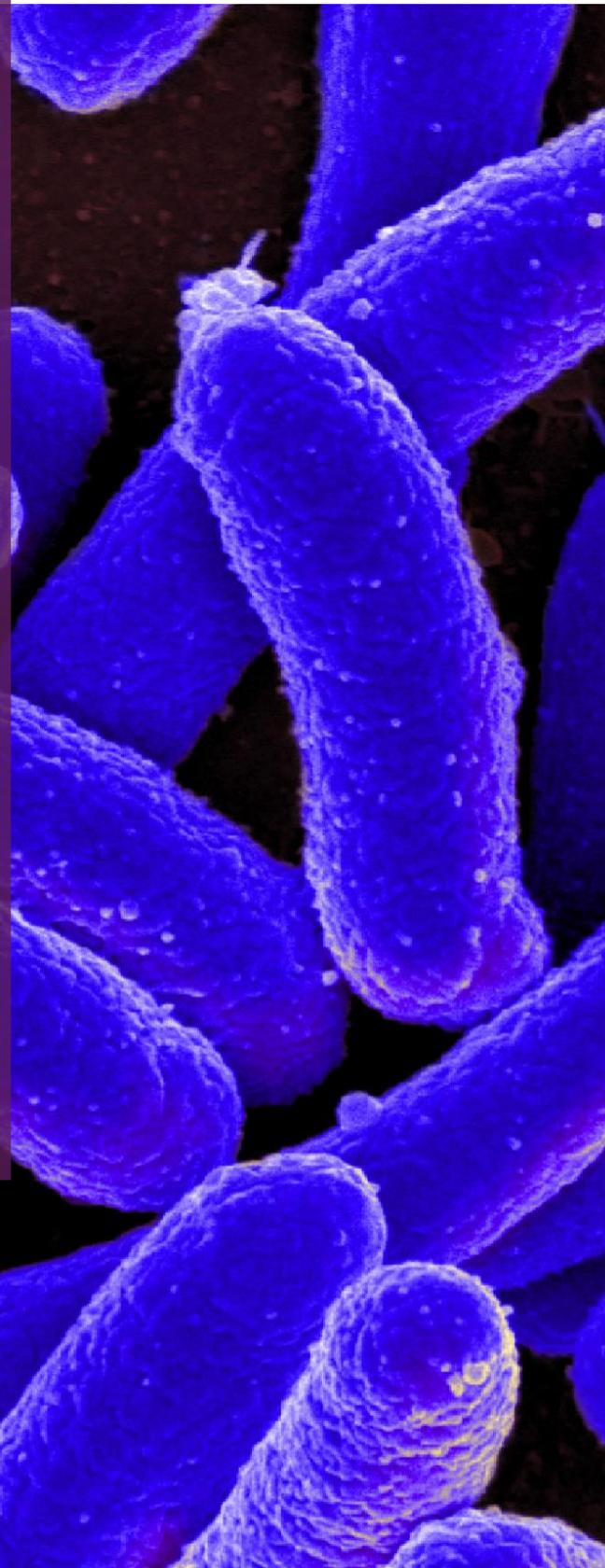
Food Safety: Tough to Trust

There's expanded thinking around the crux of food safety; it's no longer exclusively about foodborne illness, but also the long-term impact of ingredients in food and beverages. Interestingly, crowdsourcing technology, via search engines like Yelp, is helping pinpoint the location of food safety outbreaks. But, as the number of food scares and incidents of faulty products rise worldwide, brands have an opportunity to use their food safety platforms to establish trust.



Nestlé's popular Maggi Noodles were recalled and removed from shelves for nearly six months due to potentially unsafe amounts of lead, sparking debate, a huge dip in Nestlé's sales and the testing of other brands. Within a month of this incident, sales of the entire instant noodles market in India fell by 80 percent.*

**Edelman client*



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Restaurants Take Control

Customers have long called the shots when it comes to dining out, but restaurateurs are starting to push back, as they increasingly experiment with solutions to problems like no shows, last-minute cancellations, wage discrepancies and rampant cell phone abuse at the table.



Joe's Crab Shack recently became the very first national U.S. chain to eliminate tipping in stores, showcasing how the trend is already trickling from fine dining to casual.



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Veggies Front & Center

Rising beef prices, horror over hormones, health concerns, the growth of farmers markets and more have all helped pave the way for veggies to go mainstream as a main course. Veggies, oft-thought of as more of a side dish, have moved firmly into the center of the plate.



Tokyo, rated 2015's greatest food city, uses fresh vegetables that command very high prices. Produce is an integral part of the city's culinary scene.



14



Hunger for Heritage

From Peruvian chicken to Korean bibimbap to your grandmother's bone broth, new culinary traditions blend old with new to mark a rise of authenticity and heritage.



Bone broth began sweeping through the U.S. in 2014, and the trend continues to gain interest from celebrities, chefs and consumers alike.



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Multisensory is Multipurpose

Neurogastronomy – how the brain creates flavor and triggers our perception of it – is a buzzword for restaurateurs and food manufacturers, with high-tech settings able to dramatically enhance mood and flavor, either for an otherworldly dining experience or health benefits.



The “Dining in the Dark” experience hits Africa by way of a new restaurant in Nairobi, where the blind restaurant staff was trained by French restaurateurs.



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Gen Z Rising

The next target audience has arrived and it's here to stay. Meet Generation Z – younger, richer and more diverse than ever. While their Gen Y brethren want to reinvent the system, Gen Z wants to recreate it. If food and beverage brands want to appeal to this generation's environmental sensibility, short attention span, pragmatism, need for personalization and eye for quality without premium pricing, they'll need to think fresh, think interesting and think bite-size.



More than half of Gen Z enjoy trying different foods. They have a willingness to explore innovative flavors and ingredients.

**Edelman client*

