Mondelēz International
SNACKING MADE RIGHT

Mondelēz International Ecosystem

July 2024

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LATIN AMERICA

FY2023 Net Revenues: $5.0 Billion

The Latin America segment makes and sells snack products in Mexico and key regions in South America.



EUROPE

FY2023 Net Revenues: $12.9 Billion

The Europe segment makes and sells snack products in European and certain Eurasian countries.



ASIA, MIDDLE EAST, AND AFRICA

FY2023 Net Revenues: $7.1 Billion

The AMEA segment makes and sells snack products in key regions in Asia, the Middle East, and Africa.



NORTH AMERICA

FY2023 Net Revenues: $11.1 Billion

The North America segment makes and sells snack products in the United States and Canada.



PRODUCT CATEGORIES

Biscuits & Baked Snacks
2023 Revenue: $17.6 Billion (49%)

OREO, RITZ, Triscuit, CLIF BAR, LU, CLUB SOCIAL, Chips Ahoy!, TUC, ORIGINAL PREMIUM, TATE'S BAKE SHOP SOUTHAMPTON, NY, PRINCIPE, WHEAT THINS

Chocolate
2023 Revenue: $10.6 Billion (29.5%)

CÔTE D'OR, Cadbury, LACTA, Cadbury 5Star, TOBLERONE, Milka, Cadbury Dairy Milk

Gum & Candy
2023 Revenue: $4.4 Billion (12.2%)

Chiclets, HALLS, Clorets, SOUR PATCH KIDS, Trident, Dentyne, Endearmints, Bubbaloo, Maynards BASSETTS

Beverages
2023 Revenue: $1.2 Billion (3%)

TANG, Cadbury Bourn Vita, Clight SIN AZÚCARES

Cheese & Grocery (Meals)
2023 Revenue: $2.2 Billion (6%)

ORIGINAL PHILADELPHIA, Royal, a good source of calcium dairylea

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Mondelēz International, Inc.
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Chicago, Illinois 60607
Phone: 847-943-0000; Website: www.mondelezinternational.com

Outside Relationships

Regulators

Subjects of General U.S. Business Regulation

General Business

U.S. Environmental Protection Agency (EPA) (regulation of, and permits for, discharges, leaks, emissions, disposals, storage of particular matter, hazardous waste, and toxic substances in the water, air and soil); superfund cleanup requirement for contamination)

U.S. Patent and Trademark Office (PTO); U.S. Copyright Office (USCO) (patent, trademark, service mark & copyright registrations and renewals)

U.S. Department of Labor (DOL) (**DOL**: regulation of work practices, wage and overtime record-keeping; **EEOC**: enforcement of anti-discriminatory laws in hiring, workplace practices and civil rights; **OSHA**: workplace health and safety, and serious injury reporting)

U.S. Department of the Treasury (**FinCen**: "know your customer" data collection requirements / anti-money laundering regulation; **OFAC**: restricted party transactions regulation; and **Treasury**: economic sanctions)

U.S. Internal Revenue Service (IRS) (regulation of corporate income, payroll, and withholding taxes)

U.S. Department of Justice (DOJ) and Federal Trade Commission (FTC) (**DOJ/FTC**: enforcement of antitrust and fair-trade laws, and business combination/merger reviews and clearances; and **DOJ**: foreign corrupt practices law enforcement)

U.S. Dept of Commerce. Bureau of Industry and Security / Export Administration (regulation of exports of finished goods, raw materials and supplies, and information handling; tariffs, trade barriers, and export licenses)

Food and Beverage

U.S. Department of Homeland Security (DHS) and Customs and Border Protection (CPB) (**DHS**: regulation of imports of finished goods, raw materials and supplies; record-keeping requirements for facilities that manufacture, process, pack, or hold food for human consumption; **CPB**: customs duties administration)

U.S. Department of Agriculture (USDA) (diary inspections; food product safety and quality standards)

U.S. Commodity Futures Trading Commission (CFTC) (regulation of futures commission merchants regarding futures and swap-related trades of agricultural commodities)

U.S. Consumer Product Safety Commission (CPSC) (product safety regulation)

U.S. Food and Drug Administration (FDA) and State Authorities (Inspections of Food prior to Distribution; Regulation of Food Production/Good Manufacturing Practices, Transportation, Storage, Distribution, Sale, Display, Advertising, Marketing, Product Labeling and Packaging, Food Quality, and Safety of Food Products and Ingredients, , including Color Additives; , Mandatory Recall Authority)

Capital

Public Debt Holders

Hedge Counterparties

Commercial Banks under 364-Day Revolver (**Administrative Agent and Key Lender**: JPMorgan Chase Bank)

(**Other Banks**: Banco Bilbao Vizcaya Argentaria, Bank of America, Barclays Bank, Citibank, Deutsche Bank, Goldman Sachs Bank, HSBC Bank, Mizuho Bank, Morgan Stanley Bank, MUFG Bank, Société Generale, Sumitomo Mitsui Banking Corp., Toronto-Dominion Bank, Wells Fargo Bank, Banco Santander, Canadian Imperial Bank of Commerce, Commerzbank, Cooperative Rabobank, Credit Agricole Corporate and Investment Bank, ING Bank, Intesa Sanpaolo, National Westminster Bank, Royal Bank of Canada, Standard Chartered Bank, Truist Bank, U.S. Bank, Westpac Banking Corp., Banco Bradesco, DBS Bank, The Northern Trust Company, Standard Bank of South Africa)

Suppliers

Selected Labor Unions (Australia Manufacturing Workers Union, (AMWU); Bakery, Confectionery, Tobacco Workers, and Grain Millers International Union (BCTGM); and The International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF), an international trade union federation composed of 412 trade unions in 126 countries with an affiliated membership of over 2.5 million members. It is based in Geneva, Switzerland)

Key Categories of Supply

Ingredients

Cocoa

Dairy

Wheat

Edible Oils

Sugar and Other Sweeteners

Flavoring Agents

Nuts

Packaging

Customers

Primary Customer Categories

Grocery Stores and Supermarket Chains

Publix, Whole Foods Market, Albertsons, Kroger

Club Stores and Hypermarkets

Sam's Club, BJ's Wholesale Club, Costco Wholesale

Supercenters and Mass Merchandisers

Target, Walmart

Business Regulation

Bond Financing

Commodity, Foreign Currency Exchange and Interest Rate Derivatives

Working Capital Financing

Labor Union Representation and Collective Bargaining Services (although the unions do not supply labor, they represents employees hired by Mondelez)

Supplies of Food Ingredients, Packaging Materials, Fuel, and Energy

Sales of Chocolate, Biscuits, Baked Snacks, Powder Beverage Mixes, Gum, Candy, and Cheese Products

Wholesalers and Distributors

Convenience Stores

Gasoline Stations

Drug Stores

Packaging Materials (plastics, aluminum, labels, and paper products)

Energy: Natural Gas; Fuels; Electricity

Mondelēz International, Inc. (a Virginia corporation)

Debt Structure

Debt ($ 17.307 Billion @ 12/31/2023) | Credit Ratings: Baa1 (Moody's), BBB (S&P), BBB (Fitch)

Working Capital

Commercial Paper Program: $346 M	Uncommitted Credit Facilities: $1.39 B	Revolving Credit Facility: $1.5 B (Matures 2024)	Revolving Credit Facility: $4.5 B (Matures 2027)

Debt Issued or Guaranteed by Parent

2024 – 2050 U.S. Dollar Notes: $9.56 B @ 3.018% avg.	2024 – 2041 Euro Notes: $7.92 B @ 0.709% avg.	2024 – 2045 Pound Sterling Notes: $ 333 M @ 4.151% avg.	2024 – 2025 Swiss Franc Notes: $ 386 M @ 0.911% avg.	2024 – 2025 Canadian Dollar Notes: $ 452 M @ 3.377% avg.

Logo History

Corporate Brands

Mondelēz International — 2012 - 2022

Mondelēz International SNACKING MADE RIGHT — 2023 - Present

Equity Structure

Equity Capital

2023 Share Repurchase Program Authorized: $6.0 B Expiration: 12/31/2025 Balance: $4.4 B	Preferred Stock Authorized: 500M shares Issued: None Record Holders: None	Class A Common Stock Authorized: 5.0 B shares Issued: 1.997 B shares Outstanding: 1.346 B shares Record Holders: 36,216

Governance

Board of Directors

Dirk Van de Put (Chair)	Jorge S. Mesquita (A,F)	Patrick T. Siewert (Lead)	Committees: Audit (A) Finance (F) Governance, Membership and Sustainability (G) People and Compensation (P)
Charles E. Bunch (G,P)	Anindita Mukherjee (G,P)	Michael A Todman (G,P)	
Ertharin Cousin (G,P)	Jane Hamilton Nielsen (A,F)		
Cees 't Hart (A,F)			
Brian McNamara (G,P)	Paula A. Price (A,F)		

Management Team

CEO: Dirk Van De Put	EVP & President, Asia Pacific, Middle East & Africa: Deepak Iyer	EVP, Chief Marketing & Sales Officer: Martin Renaud
EVP, Business Transformation: Mary E. Barnard	EVP & Chief People Officer: Stephanie Lilak	EVP, CFO: Luca Zaramella
Chief Supply Chain Operations Officer: Frank Cervi	EVP & President, Latin America: Mariano Lozano	EVP, Corporate & Legal Affairs, General Counsel and Corporate Secretary: Laura Stein
EVP & President, Europe: Vince Gruber	EVP, Chief Research & Development Officer: Daniel Ramos	EVP, President, North America: Gustavo Valle

Corporate Matters

Finance and Accounting

Finance
- Controller
- Investor Relations
- Treasury
- Financial Reporting
- Tax
- Financial Planning & Analysis

Information and Technology
- IT Infrastructure, Equipment and Applications
- Cloud Services

Shared Services
- Shared Services Oversight

People
- Talent Acquisition and People Development
- Compensation and Benefits
- Employee Engagement and Culture
- Organizational Strategies and Capabilities
- Diversity and Inclusion

Business Transformation
- ERP Global Implementation (SAP S4/HANA)
- Digital Transformation Program

Research & Development

Product and Packaging Development

In May 2024, Mondelēz announced plans to invest $5+ million in a biscuit and baked snacks lab and innovation kitchen in Singapore.

- Nutrition
- Quality
- Food Safety

Research
- Scientific Affairs Worldwide

Corporate & Legal Affairs

Legal
- Legal Operations (includes transactions, intellectual property management and litigation management)
- Corporate Governance
- Compliance

Communications
- Public and Government Affairs
- Community Foundation Efforts
- Corporate Reputation
- Sustainability/ESG Agendas
- Internal and External Corporate Communications

Marketing and Sales
- Media & Digital
- Insights & Analytics
- Category Growth Strategy
- Brand Strategy
- Agency Relationships
- Marketing Capability

Supply Chain Operations
- Supply Chain Organization Management (136 plants and 60,000 employees)
- Major Category Procurement
- MRO Purchasing
- Supplier Relations
- Logistics and Freight
- Procurement & Inventory Management Systems

Operations

Latin America Segment (FY 2023 Revenue: $5.006 Billion)

The Latin America segment makes and sells snack products in Mexico and key regions in South America.

President: Mariano C. Lozano

Facilities Overview
- Manufacturing Facilities: 19
- Distribution Facilities: 15

Locations

Argentina (Beldent, Bubbaloo, Cadbury, Cerealitas, Champagne, Clight, Club Social, Express, Halls, Mayco, Milka, Oreo, Pepitos!, Rhodesia, Royal, SHOT, Suchard, TANG, Terrabusi, TITA, Toblerone)

Brazil (Amandita, Bis, Bon Gouter, Bubbaloo, Chiclets, Chocolisia, Chocooky, Clight, Clorets, Club Social, Diamante Negro, Fresh, Halls, Lacta, Laka, Oreo, Plets, Philadelphia, Royal, Sonho de Valsa, SHOT, TANG, Toblerone, Trakinas, Trident)

Colombia (Bubbaloo, Chiclets, Clight, Halls, Sparkies, Trident)

Costa Rica (Milka, Oreo, TANG, Trident, Bubbalooo, Halls, Royal)

Mexico (Bran, Bubbaloo, Chiclets, Chips Ahoy, Clight, Clorets, Halls, Jell-O, Log Cabin, Marbú Dorada, Oreo, Philadelphia, Recolino, Ritz Crackers, Royal Baking Powder, Sour Patch Kids, TANG, Trident)

AMEA Segment (FY 2023 Revenue: $7.075 Billion)

The AMEA segment makes and sells snack products in key regions in Asia, the Middle East, and Africa.

President: Deepak D. Iyer

Facilities Overview
- Manufacturing Facilities: 45
- Distribution Facilities: 26

Locations

Australia, New Zealand (belVita, Cadbury, Cadbury Dairy Milk, Gourmet Food, Green & Blacks, Premium, Pascall, Philadelphia, Oreo, Ritz, Sour Patch Kids, The Natural, Toblerone)

China, Japan (Oreo, belVita, Pacific, LU, Toblerone, Côte D'Or, LU Prince, Halls, Ritz, Stride, TANG, Tiki, TUC, Lucky, Clorets, Recaldent, Premium)

Egypt, Nigeria, South Africa, UAE, Saudi Arabia, Bahrain (Cadbury, Clorets, Halls, Oreo, Trident, Cadbury Bourn Vita, Bubbaloo, Butter mint, Cadbury, Chiclets, Clight, Sparkies, Tom Tom, Chappies, Chomp, Crunchie, Dentyne, Endearmints, Flake, LU, TANG, TUC, Lunch Bar, STIMOROL)

India, Pakistan, Indonesia, Malaysia (belVita, Kraft Cheddar, Biskuat, Cadbury, Cadbury Zip, Cadbury Chocobakes, Cadbury Dairy Milk, Cadbury Dairy Milk Silk, Cadbury Dairy Milk Crispello, Cadbury Chocobix, Cadbury Cocoa, Cadbury Joy Deliveries, Cadbury Nutties, Cadbury Chocliars, Cadbury Gems, Oreo, Ritz, Cadbury 5Star, Cadbury Bournvita, Cadbury Bourn Vita, Halls, TANG, Toblerone, Twisties Chacho's, Jacobs, Philadelphia, Tiger, Twisties)

Philippines, Singapore, Thailand, and Vietnam (Cadbury 5Star, Cadbury, Cadbury Dairy Milk, Calumet Baking Powder, Cheez Whiz, Eden, TANG, Tiger, Halls, Ritz, Oreo, Toblerone, belVita, Philadelphia, Clorets, Dentyne, AFC, Cosy, Kinh Do, LU, Slide, Solite, Trident)

Europe Segment (FY 2023 Revenue: $12.857 Billion)

The Europe segment makes and sells snack products in European and certain Eurasian countries.

President: Vinzenz P. Gruber

Facilities Overview
- Manufacturing Facilities: 61
- Distribution Facilities: 6

Locations

Denmark, Germany & Austria (Daim, Halls, Marabou, Oreo, Philadelphia, TUC)

Finland (Marabou, Daim, Toblerone, LU, Oreo, O'boy, Philadelphia, TUC)

France (Belin, belVita, Côte D'Or, Granola, Heudebert, Milka, Oreo, LU)

Ireland (Cadbury, Clorets, Halls, Oreo)

Poland, Baltics, Norway, Turkey, Ukraine (Milka, Oreo, belVita, Halls Petitki, Delicje, Sao, Freia, Bassetts, Daim, O'boy, Philadelphia, Ritz, TUC)

Switzerland (belVita, Fidorka, Figaro, Halls, LU, Milka, Mikado, Mirabell, Ocavia, Oreo, Philadelphia, LU Prince, Suchard, Toblerone, TUC)

United Kingdom (belVita, Cadbury, Green Blacks, Maynards Bassetts, Trebor, Halls, Mikado, Oreo, Philadelphia, Dairylea, Grenade, Ritz, Toblerone)

North America Segment (FY 2023 Revenue: $11.078 Billion)

The North America segment makes and sells snack products in the United States and Canada.

President: Gustavo C. Valle

Facilities Overview
- Manufacturing Facilities: 23
- Distribution Facilities: 60

Locations

Canada (Cadbury Caramilk, Cadbury creme egg, Cadbury Dairy Milk, Oreo, Christie, Dad's, Halls, Ritz Crackers, Maynards Bassetts, Peek Freans)

Chicago Bakery (Wheat Thins, Chips Ahoy! Cheese Nips, Premium, Nutter Butter, Barnum Animal Crackers)

Naperville, Illinois Bakery (Triscuit)

Portland, Oregon (Wheat Thins, Ritz, Chips Ahoy!, Oreo, Chicken in a Basket, Good Thins, Premium)

Richmond, Virginia (Oreo, Ritz, Nilla, Wheat Thins, Chips Ahoy!)

Toledo, Ohio Flour Mill (Flour)

PRODUCT CATEGORIES

Biscuits & Baked Snacks
(2023 Revenues: $17.629 Billion; 49%)

This product category includes cookies, crackers, salted snacks, snack bars, and cakes & pastries. Popular brands include Oreo, belVita and LU.

Principe, Tate's Bake Shop, Nutter Butter, Chips Ahoy!, Tiger, Oreo, Club Social, Premium, Wheat Thins, Ritz, LU, Tuc, Bar, Clif, Triscuit

BISCUITS AND BAKED SNACKS COMPETITION: McKee Foods (McKee, Little Debbie), General Mills, Campbell's, Pepperidge Farm, Kellanova, Nestlé

Chocolate
(2023 Revenues: $10.619 Billion; 29.5%)

This product category includes Chocolate product. Popular brands include Cadbury, Milka and Toblerone.

Freia, Côte d'Or, Marabou, Lacta, LunchBar, Cadbury Dairy Milk, 5Star, Milka, Cadbury, Toblerone

CHOCOLATE COMPETITION: Mars (Mars, Mars, M&M's), Ferrero Rocher, Hershey's, Kraft Heinz, Lindt & Sprüngli, Nestlé

Gum & Candy
(2023 Revenues: $4.426 Billion; 12.2%)

This product category includes gum under the Trident, Stride and Clorets brands and candy under brands such as Maynards Bassetts and Sour Patch Kids.

Chiclets, Halls, Dentyne, Clorets, Trident, Beldent, Stimorol, Sour Patch Kids, Bubbaloo, Endearmints, Stride, Recaldent, Maynards Bassetts

GUM & CANDY COMPETITION: Mars (Mars, Juicy Fruit, Spearmint), Perfetti Van Melle (Perfetti, Mentos, Lotte, Alpenliebe, Airwaves), Hershey's (Jolly Rancher, Ice Breakers, Twizzlers)

Beverages
(2023 Revenues: $1.185 Billion; 3%)

This product category includes beverages under the Bournvita and Tang powdered beverage brands.

Tang, Cadbury Bourn Vita, Clight

BEVERAGES COMPETITION: Pepsi (Pepsi, Keurig Dr Pepper), Coca-Cola (Coca-Cola, Red Bull), Unilever (Kraft Heinz)

Cheese and Grocery (Meals)
(2023 Revenues: $2.1547 Billion; 6%)

This product category includes cheese and grocery products under the the popular Philadelphia and Royal brands.

Philadelphia, Royal, dairylea

CHEESE AND GROCERY COMPETITION: Lactalis (Lactalis, Parmalat), Kraft Heinz, Organic Valley, Smithfield

Outside Relationships

Customers

Customers via Direct-to-Consumer and E-commerce Channels

End Consumer

Individuals (via Mondelēz International's DTC websites and social media platforms)

Businesses

Businesses (via third party pure play E-retail platforms, and retailer digital platforms)

Retailers (via their digital platforms)

Suppliers

Professional Service Firms

Pricewaterhouse Coopers LLP (audit services)

Publicis Groupe (global creative content production and management services)

Lobbying Services Providers (Capitol Tax Partners; Monument Advocacy)

Bryan Cave Leighton Paisner (legal services)

SAP (S4/HANA enterprise resources planning software)

Capital

Significant Shareholders

Vanguard Group Inc. (9.75%)

Blackrock Inc. (7.23%)

State Street (4.31%)

JP Morgan Chase & Company (3.96%)

Capital Research Global Investors (2.42%)

Institutional Ownership (83.96%)

Regulators

Securities Regulators

U.S. Securities and Exchange Commission (regulation of offers and sales securities, material event disclosure and financial reporting requirements; recordkeeping requirements under anti-bribery law)

NASDAQ Global Select Market (listing, maintenance and corporate accountability rules)

Securities Law Regulation and Stock Listing Requirements

Equity Capital

Dividends and Common Stock Repurchases

Professional Services

Digital Sales of Chocolate, Biscuits, and Baked Snacks Directly to End Consumers

Business-to-Business Sales of Chocolate, Biscuits, and Baked Snacks through Pure Play E-retail Digital Platforms

Digital Sales of Chocolate, Biscuits, and Baked Snacks Directly to End Consumers

Business-to-Business Sales of Chocolate, Biscuits, and Baked Snacks through Retailer Digital Platforms

Key Company Data
(as of 12/31/2023)

Business Overview: Mondelēz International's purpose is to empower people to snack right. The company sells its products in over 150 countries around the world. The company is one of the world's largest snack companies with global net revenues of $36.0 billion and net earnings of $5.0 billion in 2023. Mondelēz's core business is making and selling chocolate, biscuits and baked snacks. The company also has additional businesses in adjacent, locally relevant categories including gum & candy, cheese & grocery and powdered beverages. The company's portfolio includes iconic global and local brands such as Oreo, Ritz, LU, CLIF Bar and Tate's Bake Shop biscuits and baked snacks, as well as Cadbury Dairy Milk, Milka and Toblerone chocolate.

Share Data

NASDAQ Global Select Market Ticker Symbol: MDLZ
Share Price: $65.32 (07/11/2024)
Earnings Per Share (Trailing 12 Months): $3.14
Forward Annual Dividend: $1.70/share
Market Capitalization: $87.6B (07/11/2024)

Resources

Employees: 91,000
Headquarters: Chicago, Illinois
Facilities: 148 manufacturing and processing facilities in 46 countries and 107 distribution centers and warehouses worldwide
Goal: to lead the future of snacking around the world by offering the right snack, for the right moment, made the right way.

Financial Highlights

Statement of Earnings

Net Revenues: $36.016 B
Cost of Sales: ($22.25 B)
Gross Profit: $13.76 B (38.2% Margin)
SG&A Expenses: ($8.002 B)
Operating Income: $5.502 B
Net Earnings: $4.968 B

Balance Sheet

Total Assets: $71.391 B
Total Liabilities: $43.025 B
Long-Term Debt: $16.887 B
Equity: $28.366 B

Cash Flow

From Operations: $4.714 B
Used in Investing: $2.812 B
Used in Financing: ($7.558 B)

Financial Returns

Return on Equity: 17.51%

Key Developments

Biscoff Brand Expansion. On June 13, 2024, Mondelēz and Lotus Bakeries, which owns the Biscoff caramelized biscuit, announced a partnership in which (1) Mondelēz will manufacture, market, distribute, and sell Lotus Biscoff brand in India, and (2) the parties will develop chocolate products combining the taste and texture of the popular cookie with Mondelēz's Cadbury, Milka and other chocolate brands in Europe.

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U.S. Food and Beverage Supply Chain: Overview (with Mondelez International)

July 2024

Sectors

Overview. At $1.5 trillion in annual sales, the contribution of the U.S. food industry is enormous. The complex process of turning raw materials into edible food products (the food supply chain) involves (a) the production of crops, animals and marine life, (b) processing the inputs into feed for animals, intermediate food products for further processing, and finished products, (c) storage and distribution, (d) retailing, and (e) end consumption.

A Beverage Products

The U.S. beverage industry produces ready-to-drink alcoholic beverages (38%) and non-alcoholic beverages (62%). It generates $665 billion in annual sales. Beverage production can vary greatly depending on the drink being made, which ranges from water, flavored water, juices, carbonated soft drinks, and spirits and alcoholic beverages. Water is the most popular non-alcoholic beverage in the U.S. (51%), followed by coffee (15%) and sweetened beverages, such as soft drinks (excluding diet sodas) and juices (10%). Soft drinks and juices typically contain water or carbonated water, fruit, color additives, natural flavors, and sugar, among many other ingredients. The largest segment of the alcoholic beverage market is beer, which consists of malted cereal grains, hops, water, and alcohol. Beverage production differs by the type of container in which the drink will be bottled or packaged. For example, drinks may be canned (aluminum) or bottled (plastic or glass), hot-fill or cold-fill, and natural or conventional.

B Agricultural Products

The key inputs to the agricultural production of grasses, vegetables, and fruit are seeds, farm equipment, crop protection products, and labor.

Seeds. Seed producers develop and supply commercial seeds combining advanced germplasm and traits to produce optimum crop yields for farms worldwide. These so-called trait technologies are genetic modifications designed to (a) improve the resistance of seeds and their crops to weather, disease, insects, and weeds (i.e., herbicide tolerance, drought resistance and pest defenses) and (b) enhance food and nutritional characteristics.

Crop Protection. To achieve the maximum yield, farmers and other crop producers protect their crops from weeds, insects (mites, pests), disease-causing pathogens, and small animals (e.g., rats and birds) with crop protection solutions applied above-ground by chemical sprays and below-ground via nitrogen management and seed-applied technologies.

Farmers. Farmers in all 50 states produce food, but agricultural production is heavily concentrated in the Midwestern states and California. Roughly 95% of farms are family farms, but not all such farms are small. Individual, small family farms account for 21% of production, while mid-sized and larger scale family farms account for 66% of production. Bill Gates now owns the most farmland of any person in the U.S., consisting of 269,000 acres across 19 states where he grows potatoes, corn, soybeans, carrots, and cotton).

Farm Equipment. Various companies manufacture and sell to crop growers a variety of large and mid-size tractors, combines, cotton pickers, harvesters and loaders, soil preparation, seeding, application, and crop care equipment, and hay and forage equipment.

Crops. Seeds grow into crops, which may be grown in soil (corn, wheat, soybeans), in water and above-ground structures (hydroponic tomatoes), in natural waterways (seaweed, algae, kelp), and on trees (fruits, nuts). Roughly 11% of the planet's land is dedicated to crop production.

C Animal Production

Nearly 26% of the planet's land is used for ranching/animal pastures, which is the starting point tor the production of beef and lamb (red meat), poultry, pork, eggs and dairy products. Ranching is the practice of raising livestock and wildlife to provide meat, eggs, and dairy products. Ranches are big investments and are often owned by wealthy individuals from business sectors outside the food industry, such as John Malone (telecom), Stan Kroenke (sports franchises), Ted Turner (entertainment media), and Douglas Tompkins (apparel).

D Aquaculture Products

Commercial aquaculture is the farming, catching and marketing of fish, shellfish and even plants in fisheries for profit. It refers to the cultivation of both marine and freshwater species and can range from land-based to open-ocean production. In the U.S., 93% of fishery production will be processed into edible products (frozen, fresh, canned, cured) and 7% will become industrial products (i.e., meal, oil, bait, animal feed).

1 Farm Production

Agricultural Production. Agriculture production is the use of cultivated plants or animals to what ultimately sustains or enhances human life. It encompasses (1) cultivating the soil, planting, growing and harvesting crops, or rearing, feeding, and managing animals (agriculture); (2) raising fish (aquaculture); (3) growing flowering plants (floriculture); (4) growing fruits, vegetables, and plants (horticultures); and (5) growing trees (silviculture). The crops produced are purchased by businesses specializing in processing them into food, fuel, fiber, or raw materials (e.g., animal feed) and then sold mainly to foodservice wholesalers or other processors.

Agricultural Producers. Businesses involved in agricultural production include breeding operations, farms (including crops and certain animals), greenhouses and nurseries that grow flowers, orchards, ranches, and tree and sod farms. On the periphery are elevator operators who (a) store raw materials before the production begins or (b) store, handle, or move intermediate goods.

SEEDS AND CROP PROTECTION PRODUCERS

SUGAR AND BEVERAGE CROP PRODUCERS

FARM LABOR

FARM EQUIPMENT SUPPLIERS

CROP GROWERS AND COOPERATIVES

ANIMAL FEED SUPPLIERS

RANCHERS AND FEED LOTS

FISH FARM FEED SUPPLIERS

SEAFOOD PRODUCERS

2 Food and Beverage Processing

Transformation. Food processing is the transformation of agricultural products into food, or of one form of food into other forms. Food processing takes many forms, from grinding grain into raw flour to making a home-cooked meal to complex industrial methods used to make convenience foods. Agricultural crops are turned into four categories of products we use every day, including (1) foods for human consumption, (2) fuels (e.g., ethanol made from corn, sugarcane, and sorghum for use in gasoline mixes for cars), (3) fibers (e.g., cotton (one of the top 10 crops produced in the U.S. every year), wool, silk to make clothes, hemp to make rope, flax for linen, and bamboo fiber to make cloth), and (4) raw materials, which are crops grown to feed animals. Our focus is the processing of agricultural products into food (e.g., cooking oils, vegetables, fruits, nuts, bread, cereal, snacks, milk, cheese, beef, pork, chicken, seafood), animal feed, and beverages (juices, carbonated soft drinks, coffee, tea, energy drinks, water and flavored water, and alcoholic beverages).

BEVERAGE MAKERS

CROP PROCESSORS

MEAT, EGG AND DAIRY PROCESSORS

SEAFOOD PROCESSORS

3 Wholesale Distribution

Break Bulk/Transport. The foodservice distributor (a) procures bulk inventory quantities from food producers and processors, (b) "breaks bulk" (i.e., breaks down large volumes of products into smaller quantities that an operator can use), (c) palletizes and stores the products in refrigerated warehouses, and (d) sells and transports the products to foodservice operators. Distributors supply operators in two markets: (1) retailers, grocery stores, and convenience stores for the food consumed-at-home market and (2) restaurants, schools, military bases, and hospitals for the food consumed away-from-home market.

WHOLESALE BEVERAGE DISTRIBUTORS

WHOLESALE FOOD DISTRIBUTORS

4 Food Retailing

Retail Foodservice. Foodservice operators include (a) retailers whose primary product line is food—grocery and convenience stores, restaurant chains, independent restaurants, caterers, vending machine owners–and (b) establishments where food is ancillary—hospitals, nursing homes, schools, universities, military bases, hotels, airlines, churches, drug stores, gas stations, movie theaters, amusement parks, and sports venues. Foodservice operators get their products primarily from wholesalers, but they may also buy some food directly from farmers or suppliers who work with farmers.

GROCERY STORES AND OTHER FOOD RETAILERS

RESTAURANTS, SCHOOLS, MILITARY BASES, HOTELS, AIRLINES, HOSPITALS, SCHOOLS, ENTERTAINMENT VENUES

FOOD CONSUMED AT HOME MARKET

FOOD CONSUMED AWAY FROOM HOME MARKET

5 Food Consumption

In-Home and Away-from-Home Markets. An estimated 67-80% of finished food and beverage products are consumed at home, and just over 20-33% is consumed away from the home at restaurants, bars, catered social, charitable and special events, sporting events, airports, hotels, and on common carriers (e.g., passenger railcars and commercial airlines).

DINING IN

DINING OUT

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U..S. Food and Beverage Supply Chain: Simplified

July 2024

Sectors

Overview. At $1.5 trillion in annual sales, the contribution of the U.S. food industry is enormous. The complex process of turning raw materials into edible food products (the food supply chain) involves (a) the production of crops, animals and marine life, (b) processing the inputs into feed for animals, intermediate food products for further processing, and finished products, (c) storage and distribution, (d) retailing, and (e) end consumption.

A Beverage Products

The U.S. beverage industry produces ready-to-drink alcoholic beverages (38%) and non-alcoholic beverages (62%). It generates $665 billion in annual sales. Beverage production can vary greatly depending on the drink being made, which ranges from water, flavored water, juices, carbonated soft drinks, and spirits and alcoholic beverages. Water is the most popular non-alcoholic beverage in the U.S. (51%), followed by coffee (15%) and sweetened beverages, such as soft drinks (excluding diet sodas) and juices (10%). Soft drinks and juices typically contain water or carbonated water, fruit, color additives, natural flavors, and sugar, among many other ingredients. The largest segment of the alcoholic beverage market is beer, which consists of malted cereal grains, hops, water, and alcohol. Beverage production differs by the type of container in which the drink will be bottled or packaged. For example, drinks may be canned (aluminum) or bottled (plastic or glass), hot-fill or cold-fill, and natural or conventional.

B Agricultural Products

The key inputs to the agricultural production of grasses, vegetables, and fruit are seeds, farm equipment, crop protection products, and labor.

Seeds. Seed producers develop and supply commercial seeds combining advanced germplasm and traits to produce optimum crop yields for farms worldwide. These so-called trait technologies are genetic modifications designed to (a) improve the resistance of seeds and their crops to weather, disease, insects, and weeds (i.e., herbicide tolerance, drought resistance and pest defenses) and (b) enhance food and nutritional characteristics.

Crop Protection. To achieve the maximum yield, farmers and other crop producers protect their crops from weeds, insects (mites, pests), disease-causing pathogens, and small animals (e.g., rats and birds) with crop protection solutions applied above-ground by chemical sprays and below-ground via nitrogen management and seed-applied technologies.

Farmers. Farmers in all 50 states produce food, but agricultural production is heavily concentrated in the Midwestern states and California. Roughly 95% of farms are family farms, but not all such farms are small. Individual, small family farms account for 21% of production, while mid-sized and larger scale family farms account for 66% of production. Bill Gates now owns the most farmland of any person in the U.S., consisting of 269,000 acres across 19 states where he grows potatoes, corn, soybeans, carrots, and cotton).

Farm Equipment. Various companies manufacture and sell to crop growers a variety of large and mid-size tractors, combines, cotton pickers, harvesters and loaders, soil preparation, seeding, application, and crop care equipment, and hay and forage equipment.

Crops. Seeds grow into crops, which may be grown in soil (corn, wheat, soybeans), in water and above-ground structures (hydroponic tomatoes), in natural waterways (seaweed, algae, kelp), and on trees (fruits, nuts). Roughly 11% of the planet's land is dedicated to crop production.

C Animal Production

Nearly 26% of the planet's land is used for ranching/animal pastures, which is the starting point for the production of beef and lamb (red meat), poultry, pork, eggs and dairy products. Ranching is the practice of raising livestock and wildlife to provide meat, eggs, and dairy products. Ranches are big investments and are often owned by wealthy individuals from business sectors outside the food industry, such as John Malone (telecom), Stan Kroenke (sports franchises), Ted Turner (entertainment media), and Douglas Tompkins (apparel).

D Aquaculture Products

Commercial aquaculture is the farming, catching and marketing of fish, shellfish and even plants in fisheries for profit. It refers to the cultivation of both marine and freshwater species and can range from land-based to open-ocean production. In the U.S., 93% of fishery production will be processed into edible products (frozen, fresh, canned, cured) and 7% will become industrial products (i.e., meal, oil, bait, animal feed).

1 Farm Production

Agricultural Production. Agriculture production is the use of cultivated plants or animals to what ultimately sustains or enhances human life. It encompasses (1) cultivating the soil, planting, growing and harvesting crops, or rearing, feeding, and managing animals (agriculture); (2) raising fish (aquaculture); (3) growing flowering plants (floriculture); (4) growing fruits, vegetables, and plants (horticultures); and (5) growing trees (silviculture). The crops produced are purchased by businesses specializing in processing them into food, fuel, fiber, or raw materials (e.g., animal feed) and then sold mainly to foodservice wholesalers or other processors.

Agricultural Producers. Businesses involved in agricultural production include breeding operations, farms (including crops and certain animals), greenhouses and nurseries that grow flowers, orchards, ranches, and tree and sod farms. On the periphery are elevator operators who (a) store raw materials before the production begins or (b) store, handle, or move intermediate goods.

SEEDS AND CROP PROTECTION PRODUCERS



FARM LABOR



FARM EQUIPMENT SUPPLIERS

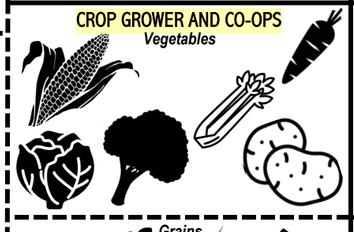


SUGAR AND BEVERAGE CROP PRODUCERS



CROP GROWER AND CO-OPS

Vegetables



Grains



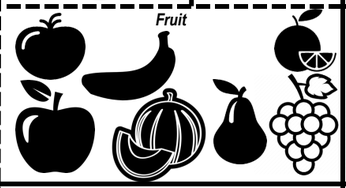
Nuts



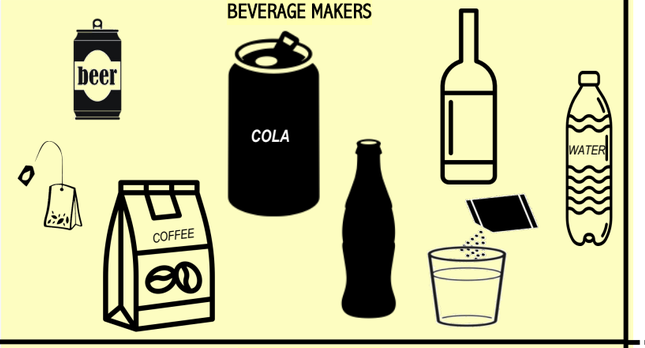
Beans



Fruit



BEVERAGE MAKERS

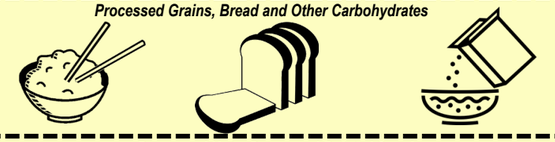


CROP PROCESSORS

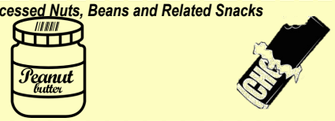
Processed Cooking Oils, Vegetables, and Related Snacks



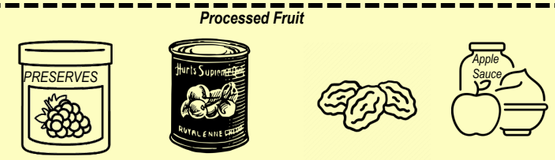
Processed Grains, Bread and Other Carbohydrates



Processed Nuts, Beans and Related Snacks



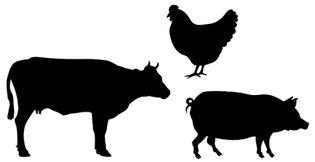
Processed Fruit



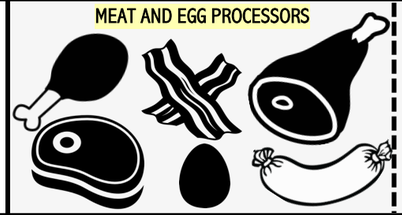
ANIMAL FEED SUPPLIERS



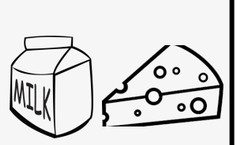
RANCHERS AND FEED LOTS



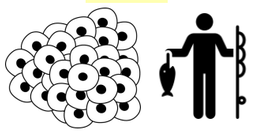
MEAT AND EGG PROCESSORS



DAIRY PROCESSORS



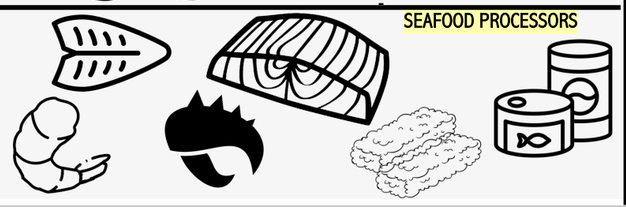
FISH FARM FEED AND EQUIPMENT SUPPLIERS



SEAFOOD PRODUCERS



SEAFOOD PROCESSORS



2 Food and Beverage Processing

Transformation. Food processing is the transformation of agricultural products into food, or of one form of food into other forms. Food processing takes many forms, from grinding grain into raw flour to making a home-cooked meal to complex industrial methods used to make convenience foods. Agricultural crops are turned into four categories of products we use every day, including (1) foods for human consumption, (2) fuels (e.g., ethanol made from corn, sugarcane, and sorghum for use in gasoline mixes for cars), (3) fibers (e.g., cotton (one of the top 10 crops produced in the U.S. every year), wool, silk to make clothes, hemp to make rope, flax for linen, and bamboo fiber to make cloth), and (4) raw materials, which are crops grown to feed animals. Our focus is the processing of agricultural products into food (e.g., cooking oils, vegetables, fruits, nuts, bread, cereal, snacks, milk, cheese, beef, pork, chicken, seafood), animal feed, and beverages (juices, carbonated soft drinks, coffee, tea, energy drinks, water and flavored water, and alcoholic beverages).

3 Wholesale Distribution

Break Bulk/Transport. The foodservice distributor (a) procures bulk inventory quantities from food producers and processors, (b) "breaks bulk" (i.e., breaks down large volumes of products into smaller quantities that an operator can use), (c) palletizes and stores the products in refrigerated warehouses, and (d) sells and transports the products to foodservice operators. Distributors supply operators in two markets: (1) retailers, grocery stores, and convenience stores for the food consumed-at-home market and (2) restaurants, schools, military bases, and hospitals for the food consumed away-from-home market.

WHOLESALE BEVERAGE DISTRIBUTORS



WHOLESALE FOOD DISTRIBUTORS



4 Food Retailing

Retail Foodservice. Foodservice operators include (a) retailers whose primary product line is food—grocery and convenience stores, restaurant chains, independent restaurants, caterers, vending machine owners–and (b) establishments where food is ancillary—hospitals, nursing homes, schools, universities, military bases, hotels, airlines, churches, drug stores, gas stations, movie theaters, amusement parks, and sports venues. Foodservice operators get their products primarily from wholesalers, but they may also buy some food directly from farmers or suppliers who work with farmers.

FOOD CONNSUMED AT HOME MARKET

GROCERY AND OTHER FOOD RETAILERS

HOLE FOODS SUPERMARKET



FOOD CONNSUMED AWAY FROOM HOME MARKET

RESTAURANTS



5 Food Consumption

In-Home and Away-from-Home Markets. An estimated 67-80% of finished food and beverage products are consumed at home, and just over 20-33% is consumed away from the home at restaurants, bars, catered social, charitable and special events, sporting events, airports, hotels, and on common carriers (e.g., passenger railcars and commercial airlines).

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U.S. Food and Beverage Supply Chain: Key Players

July 2024

Sectors

Overview. At $1.5 trillion in annual sales, the contribution of the U.S. food industry is enormous. The complex process of turning raw materials into edible food products (the food supply chain) involves (a) the production of crops, animals and marine life, (b) processing the inputs into feed for animals, intermediate food products for further processing, and finished products, (c) storage and distribution, (d) retailing, and (e) end consumption.

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A Beverage Products

The U.S. beverage industry produces ready-to-drink alcoholic beverages (38%) and non-alcoholic beverages (62%). It generates $665 billion in annual sales. Beverage production can vary greatly depending on the drink being made, which ranges from water, flavored water, juices, carbonated soft drinks, and spirits and alcoholic beverages. Water is the most popular non-alcoholic beverage in the U.S. (51%), followed by coffee (15%) and sweetened beverages, such as soft drinks (excluding diet sodas) and juices (10%). Soft drinks and juices typically contain water or carbonated water, fruit, color additives, natural flavors, and sugar, among many other ingredients. The largest segment of the alcoholic beverage market is beer, which consists of malted cereal grains, hops, water, and alcohol. Beverage production differs by the type of container in which the drink will be bottled or packaged. For example, drinks may be canned (aluminum) or bottled (plastic or glass), hot-fill or cold-fill, and natural or conventional.

B Agricultural Products

The key inputs to the agricultural production of grasses, vegetables, and fruit are seeds, farm equipment, crop protection products, and labor.

Seeds. Seed producers develop and supply commercial seeds combining advanced germplasm and traits to produce optimum crop yields for farms worldwide. These so-called trait technologies are genetic modifications designed to (a) improve the resistance of seeds and their crops to weather, disease, insects, and weeds (i.e., herbicide tolerance, drought resistance and pest defenses) and (b) enhance food and nutritional characteristics.

Crop Protection. To achieve the maximum yield, farmers and other crop producers protect their crops from weeds, insects (mites, pests), disease-causing pathogens, and small animals (e.g., rats and birds) with crop protection solutions applied above-ground by chemical sprays and below-ground via nitrogen management and seed-applied technologies.

Farmers. Farmers in all 50 states produce food, but agricultural production is heavily concentrated in the Midwestern states and California. Roughly 95% of farms are family farms, but not all such farms are small. Individual, small family farms account for 21% of production, while mid-sized and larger scale family farms account for 66% of production. Bill Gates now owns the most farmland of any person in the U.S., consisting of 269,000 acres across 19 states where he grows potatoes, corn, soybeans, carrots, and cotton).

Farm Equipment. Various companies manufacture and sell to crop growers a variety of large and mid-size tractors, combines, cotton pickers, harvesters and loaders, soil preparation, seeding, application, and crop care equipment, and hay and forage equipment.

Crops. Seeds grow into crops, which may be grown in soil (corn, wheat, soybeans), in water and above-ground structures (hydroponic tomatoes), in natural waterways (seaweed, algae, kelp), and on trees (fruits, nuts). Roughly 11% of the planet's land is dedicated to crop production.

C Animal Production

Nearly 26% of the planet's land is used for ranching/animal pastures, which is the starting point tor the production of beef and lamb (red meat), poultry, pork, eggs and dairy products. Ranching is the practice of raising livestock and wildlife to provide meat, eggs, and dairy products. Ranches are big investments and are often owned by wealthy individuals from business sectors outside the food industry, such as John Malone (telecom), Stan Kroenke (sports franchises), Ted Turner (entertainment media), and Douglas Tompkins (apparel).

D Aquaculture Products

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SEEDS AND CROP PROTECTION PRODUCERS

Owned by Corteva: Corteva agriscience, Pioneer Brand Seeds

Bayer, CHS, BASF

SUGAR BEVERAGE CROP PRODUCERS

Amalgamated Sugar, C&H, American Crystal Sugar Company

BEVERAGE MAKERS

Non-Alcoholic: Coca-Cola, Keurig Dr Pepper, Snow, PepsiCo, Monster Beverage Corporation, Starbucks, Mondelēz International (Snacking Made Right), Unilever, Nestlé, Red Bull, Kraft Heinz

Alcoholic: Molson Coors, Kirin, Heineken, AB InBev, Femsa, Carlsberg, Diageo, Pernod Ricard, Yanjing Beer, Constellation Brands, Boston Beer Co., Tsingtao, LVMH

WHOLESALE BEVERAGE DISTRIBUTORS

Diageo, PepsiCo, Molson Coors, Coca-Cola Bottling Investments Group, Gold Coast, AB InBev, AB One, Femsa, ArcaContinental, Coca-Cola Southwest Beverages, Kirin, Andrews, Swire, LOHR Distributing Co., Pernod Ricard, Hensley Beverage Company, Coca-Cola Consolidated, Keith, Coca-Cola Canada Bottling Limited

WHOLESALE FOOD DISTRIBUTORS

US Foods, Owned by Sysco: Sysco, Sygma; Owned by Berkshire Hathaway: Berkshire Hathaway Inc, McLane; Synergy; Owned by United Natural Foods: unfi, SUPERVALU; C&S Wholesale Grocers; Wakefern Food Corp.; International Wholesale.com; PFG Performance Food Group; Owned by GSC Enterprises: Brenham, GSC

GROCERY AND OTHER FOOD RETAILERS

Kroger, Publix, Albertsons, Target, Owned by Amazon: Amazon, Whole Foods Market, Costco Wholesale, Walmart, Sam's Club, piggly wiggly, The Fresh Market, CVS, Hy-Vee, Walgreens, 7-Eleven, QuikTrip

DINING IN

CROP GROWERS AND COOPERATIVES

Larsen Farms, Scully Farms, Lawrence Farms Orchards, CHS

FRUIT GROWERS

Gebbers Farms, Evans Fruit Company, Stemilt, World Famous Fruit, Dole, Borton Fruit

CROP PROCESSORS

ADM, General Mills, Cargill, Bayer, Campbell's, WK Kellogg Co, Kellanova, Mondelēz International (Snacking Made Right), CHS, PepsiCo, Kraft Heinz, Danone, Dole, Unilever, Nestlé, Conagra Brands, Hershey's

FARM LABOR

FARM EQUIPMENT SUPPLIERS

John Deere, CNH Industrial, Kubota, Tractor Supply Co, AGCO

ANIMAL FEED SSUPPLIERS, RANCHERS AND FEEDLOTS

Cargill, ADM, Ranching, Cattle Feeding, Vermejo Park Ranch, King Ranch, Waggoner Cattle Company

MEAT AND EGG PROCESSORS

Tyson, Perdue, Owned by JBS: JBS, Pilgrim's; Sanderson Farms, Hormel Foods, Smithfield (Good food. Responsibly.)

DAIRY PROCESSORS

DFA (Dairy Farmers of America), Danone, Kraft Heinz, Dean Foods

FISH FARM FEED AND EQUIPMENT SUPPLIERS

LDC (Louis Dreyfus Company), Imperial Tropicals, Glidden Pt. Oyster Farms, ADM, Conagra Brands

SEAFOOD PRODUCERS

Suisan Foodservice Seafood Produce, Red Chamber, Dongwon 동원F&B, Trident Seafoods, Pacific Seafood, Maruha Nichiro

SEAFOOD PROCESSORS

Owned by Dongwon: Dongwon 동원F&B, StarKist

Owned by FCF: FCF Co., Ltd. 豐群水產股份有限公司, Chicken of the Sea

Red Chamber, Mezzetta, Pacific Seafood, Maruha Nichiro, Trident Seafoods, Suisan Foodservice Seafood Produce

WHOLESALE SEAFOOD DISTRIBUTORS

Clearwater, High Liner Foods, Tri Marine, Mezzetta, Suisan Foodservice Seafood Produce

FOOD CONSUMED AWAY FROM HOME MARKET

RESTAURANTS

Owned by Yum! Brands: Yum!, KFC, Pizza Hut, Taco Bell

Corner Bakery, McDonald's, Denny's, Olive Garden, Starbucks Coffee, Perkins, Chick-fil-A, Kansas City's Own Gates BBQ, Cracker Barrel Old Country Store

Owned by Roark Capital/Inspire Brands: Inspire Brands, Sonic America's Drive-In, Rusty Taco, Jimmy John's, Dunkin', Buffalo Wild Wings, Arby's

Owned by Restaurant Brands International: rbi, Burger King, Popeyes Louisiana Kitchen, Tim Hortons

SEAFOOD RESTAURANTS

Red Lobster, Long John Silver's, M&S McCormick & Schmick's, Captain D's, Bubba Gump, Krab Queenz Seafood Baiguiris, Joe's Crab Shack

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U.S. Food and Beverage Supply Chain: Detailed

July 2024

Sectors

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Nearly 26% of the planet's land is used for ranching/animal pastures, which is the starting point tor the production of beef and lamb (red meat), poultry, pork, eggs and dairy products. Ranching is the practice of raising livestock and wildlife to provide meat, eggs, and dairy products. Ranches are big investments and are often owned by wealthy individuals from business sectors outside the food industry, such as John Malone (telecom), Stan Kroenke (sports franchises), Ted Turner (entertainment media), and Douglas Tompkins (apparel).

D Aquaculture Products

Commercial aquaculture is the farming, catching and marketing of fish, shellfish and even plants in fisheries for profit. It refers to the cultivation of both marine and freshwater species and can range from land-based to open-ocean production. In the U.S., 93% of fishery production will be processed into edible products (frozen, fresh, canned, cured) and 7% will become industrial products (i.e., meal, oil, bait, animal feed).

1 Farm Production

Agricultural Production. Agriculture production is the use of cultivated plants or animals to what ultimately sustains or enhances human life. It encompasses (1) cultivating the soil, planting, growing and harvesting crops, or rearing, feeding, and managing animals (agriculture); (2) raising fish (aquaculture); (3) growing flowering plants (floriculture); (4) growing fruits, vegetables, and plants (horticultures); and (5) growing trees (silviculture). The crops produced are purchased by businesses specializing in processing them into food, fuel, fiber, or raw materials (e.g., animal feed) and then sold mainly to foodservice wholesalers or other processors.

Agricultural Producers. Businesses involved in agricultural production include breeding operations, farms (including crops and certain animals), greenhouses and nurseries that grow flowers, orchards, ranches, and tree and sod farms. On the periphery are elevator operators who (a) store raw materials before the production begins or (b) store, handle, or move intermediate goods.

1 SUPPLIERS OF BEVERAGE-RELATED FARM INPUTS

Beverage-Related Seeds and Water

Seed Cane; Wheat; Hops; Sugar Beets; Water; Corn; Barley; Fruit

Soft drinks are enormously popular beverages consisting primarily of carbonated water, sugar, and flavorings. Nearly 200 nations enjoy the sweet, sparkling soda with an annual consumption of more than 34 billion gallons. Soft drinks rank as one of America's favorite beverage segments, representing 15% of the total beverage market. In the early 1990s, per capita consumption of soft drinks in the U.S. was 49 gallons, 15 gallons more than the next most popular beverage, water, but this trend had reversed a year later.

Selected Producers

Corteva Agriscience (formerly part of Dow/DuPont); Bayer (includes Monsanto); FMC; BASF; ChemChina (includes Syngenta)

Sales of Beverage-Related Seeds and Chemicals for Crop Protection

2 SUGAR AND OTHER BEVERAGE-RELATED CROP PRODUCERS

Beverage-Related Crops and Water

Sugar Cane/Beets; Corn; Potatoes; Barley (used for soup, stews, beer); Agave; Wheat; Fruit

Sugar is the general name given to the short-chain carbs that give food a sweet taste, such as glucose, fructose, and sucrose.

However, sugar has many other forms and names on labels, including beet, cane, brown date, buttered, caster, coconut, invert, golden, muscovado, palm, organic raw, confectioner's (powdered), or rapadura sugar, barley malt, cane juice crystals, corn sweetener, crystalline fructose, dextran, malt powder, ethyl maltol, fruit juice concentrate, maltodextrin, maltose, panela, & evaporated cane juice.

Selected Producers

The Amalgamated Sugar Company; American Crystal Sugar Company; Hawaiian Commercial & Sugar Company; Farmers; Agricultural Cooperatives; Local Water Distributors

Sales of Raw Beverage-Related Crops, Sugar and Water

11 Ingredients Processing

Sugar (White Granulated, Brown, Baker's/Superfine, Powdered, Organic); Corn Syrup; Malting Barley; Juice and Juice Concentrate; Non-nutritive Sweeteners (Aspartame); Flavorings and Colorings; Preservatives

Selected Producers

Beer Producers (e.g., Anheuser-Busch InBev); C&H Sugar Company; American Sugar Refining, Inc.

BEVERAGE MAKERS

12 Beverage Processors

Juices; Water and Flavored Water; Powdered Drinks; Carbonated Soft Drinks; Alcoholic Beverages; Sports and Energy Drinks; Coffee and Tea

Selected Producers

Craft Breweries; Pabst Brewing; Heineken Holdings; Anheuser-Busch InBev; Boston Beer; Carlsberg; Coca-Cola and Bottlers; Keurig Dr Pepper Inc.; Red Bull GmbH; LVMH; Monster Beverage; Molson Coors (includes Miler Brewing Company); Nestlé; Campbell's Soup Co. (V8); Mondelez International; Diageo; PepsiCo, Inc. and Bottlers; Kraft Heinz; Group Danone; Unilever; Constellation Brands

13 Packaging

Plastic Containers; Glass Containers; Aluminum Cans; Steel Cans; Food and Beverage Packaging and Processing Equipment

Selected Producers

Pactiv; Metal Container Corp.; Crown Holdings; Ball; Ardagh Group

Sales of Finished Beverage Products

22 WHOLESALERS (AT—HOME CONSUMPTION)

To Traditional Grocery Stores

Associated Wholesale Grocers; Sysco Corporation; C&S Wholesale Grocers Inc.; US Foods Holding; Metro Inc. (Canadian distributor); Performance Food Group Company; Synergy Brands Inc. (Product range includes a wide range of packaged meals and spices); International Wholesale; United Natural Foods Inc./SuperValu (the largest distributor to Whole Foods Market and other natural food stores); Brenham Wholesale Grocery Co./Grocery Supply Company (product range includes meat, produce, frozen foods, dry grocery items, candies, ice creams, and many household products); Wakefern Food Corp.

Beverage Distributors

PepsiCo (Bottling); AB InBev; Coca-Cola Bottlers

Local and specialty distributors (which offer a limited selection of custom-cut meat, seafood, specialty produce, and specialty imports) and broadline distributors (which offer a full line of food products and kitchen supplies) sell products to foodservice operators on a daily basis.

Retail Service (delivery of food to grocery and convenience stores to be consumed at home)

23 WHOLESALERS (AWAY-FROM-HOME CONSUMPTION)

To Quick Service and Casual Dining Restaurants, Convenience Stores, Discount Retailers, Wholesale Clubs, and Drug Stores

Selected Distributors

SYGMA (a Sysco business unit and distributor to large national restaurant chains—KFC, Taco Bell, Pizza Hut, Arby's, Burger King, etc.); US Foods Holding; Wakefern Food Corporation; International Wholesale (specializes in food distribution to dollar stores; also caters to supermarkets, convenience stores, and small retail stores); McLane Company (a Berkshire Hathaway-owned company)

Key Transport Suppliers

Navistar International (Trucks, Trucking Services); Thermo King (Truck, Trailer, Railway Car, Ship Container Temperature Control Systems); Crown Equipment (Electric Lift Trucks); Manhattan Associates (Supply Chain Software)

Fuel costs, which are determined mainly by the price of crude oil, comprise 25-30% of food distribution costs. Fuel costs (and any price increases) are passed on by wholesale distributors to grocery stores and restaurants, which will in turn pass on these costs to consumers in the form of higher food and drink prices.

24 To Hospitals, Other Health Care Facilities, Colleges and Universities, and Hotels

US Foods Holding; National Food Group; Sysco

There are over 8,000 hospitals, 2,800 rehabilitation centers, 38,700 nursing and retirement homes, 9,600 assisted living facilities, and 9,00 senior living facilities. A large hospital can have as many as 5,000 employees, as well as thousands of daily visitors and several hundred patients. Therefore, these facilities can be very large operations with thousands of meals served each day.

Food Service (i.e., delivery of food to be consumed away from home in restaurants, military bases, workplaces, schools, hotels, and hospitals)

25 To Military Bases

Sysco (distributor to Army, Department of Veterans Affairs, Defense Logistics Agency, Bureau of Indian Affairs); SpartanNash (one of the largest wholesale food distributors serving U.S. military commissaries); McLane Company (a Berkshire Hathaway company); US Foods Holding

Meals-Ready-to-Eat (MREs) are the main food ration for the U.S. Armed Forces and include a water-activated, flameless heater, entrée (spaghetti or beef stew), side dish (rice, corn, fruit, or mashed potatoes), cracker or bread (with peanut butter, jelly, or cheese spread), dessert (cookies or cake), candy (M&Ms, Skittles, or Tootsie Rolls), a beverage powder (Gatorade-like mixes, cocoa, dairy shakes, coffee, or tea), hot sauce or seasoning, and accessories (spoon, matches, creamer, sugar, salt, chewing gum, and toilet paper).

3 SUPPLIERS OF AGRICULTURE-RELATED FARM INPUTS

Vegetable, Grass, Fruit, and Grain Seeds / Nuts

Vegetable Seeds (Lettuce, Celery, Alfalfa, Soybeans, Sorghum, Corn, Wheat, Barley, Radishes, Turnips, Beans, Sunflowers, Sweet Potatoes, Squash, Okra, Kale, Spinach); Fertilizer; Seed Treatment; Germplasm; Novel Traits; Canola; Fruit Seeds (apple, pear, melon, orange, tomato, berry)

Selected Producers

Corteva Agriscience (formerly part of Dow/DuPont); Bayer (includes Monsanto); FMC; BASF; ChemChina (includes Syngenta)

5 Crop Protection

Fungicides (Chemicals that Kill Fungi); Herbicides (Chemicals that Kill Weeds/Grass Nuisances); Insecticides/Pesticides (Chemicals that Kill Insects); Nematicides (Chemicals that Kill Worms/Parasites); Germicides (Agent that Kills Microorganisms); Fertilizer

Selected Producers

Mosaic Company; Corteva Agriscience; ChemChina; FMC; Bayer; BASF

6 Equipment

Tractors; Scrapers; Loaders; Mowers; Combines; Balers; Sprayers; Harvesting Equipment; Soil Preparation, Seeding, Application and Crop Care Equipment

Representative Manufacturers

AGCO; Mahinera; CNH Industrial; Deere & Co.; Kubota Tractor; CLAAS; TORO Co.

Sales of Farming Equipment

Sales of Seeds and Chemical Agents for Crop Protection

4 AGRICULTURE-RELATED CROP PRODUCERS

Top Produced Crops in U.S.

Vegetables (grown for fresh market sales and processing as frozen or canned goods; broccoli, cauliflower, corn, brussels sprouts, zucchini, onions, asparagus, lettuce, spinach, tomatoes, kale, carrots); Barley (used for bread, soup, stews, health products, beer); Oats (used chiefly as livestock feed; also processed for human consumption as breakfast foods); Potatoes; Corn; Rice (short, medium, and long grain); Soybean and Oil Crops/Seeds (peanuts, sunflower seed, canola, flax); Tree Nuts (almond, walnuts, hazel nuts, pecans, pistachios); Fruits (tomatoes, bananas, grapes, apples, berries, citrus, watermelons, oranges, pears, cantaloupe, mangoes, plantains, avocadoes); Pulses (beans, peas, legumes, lentils); Wheat (hard red winter, hard red spring, soft red winter, soft white, hard white, durum; used for bread, cakes, pastry, pasta, cereals, crackers, cookies)

Comprised of mostly water, fruit is popular for its taste, nutrients (e.g., fiber and vitamins), and ability to quench thirst and beat hunger.

Grain is the harvested seed of the grasses such as wheat, oats, rice, sorghum, millet, rye, corn, and barley. Wheat is the most widely cultivated grass for its seed, a cereal grain that is a worldwide staple. The world's largest wheat producing countries are (in million metric tons):

China (134.3 MMT); India (98.5 MMT); Russia (85.9 MMT); US (47.3 MMT); France (36.9 MMT); Australia (31.8 MMT); Canada (30 MMT); Pakistan (26.7 MMT)

Selected Producers

CHS and Other Agricultural Cooperatives; Individual Farmers (e.g., Fruit, Grain, and Vegetable Growers); Stemilt Growers; Evans Fruit Co.; Gebbers Farms; Borton & Sons; Dole

Sales of Raw Vegetables, Grasses and Fruit

CROP PROCESSORS

14 Oils and Refined Products

Salad Oils; Vegetable Oils (Canola, Palm, Corn, Sunflower, Coconut, Olive); Protein Meals; Agricultural Commodities (Corn, Rice, Oilseed, Nuts, Oats, Barley, Wheat); Refined Products (Margarine, Shortening)

Food processing includes crushing and further processing oil seeds into vegetable oils and protein meals for sale "as is" or further processing into other food products and ingredients.

Selected Producers

Tyson Foods; Archer-Daniels-Midland; DuPont; Bunge; Cargill; Bayer; Unilever

15 Vegetables, Fruits, and Nuts

Diced, Canned Fruit; Tofu; Pickles; Jam and Jelly; Condiments and Sauces; Vegetable Soup; Canned/Frozen Vegetables; Plant-Based Meat; Dried Nuts

Selected Producers

Hormel; Pepsi; Unilever; J.M. Smucker; Kraft Heinz; General Mills; Campbell's

The processing of fruits and vegetables results in food produced for direct consumption and as food ingredients. The main objective of processing is to preserve the color, flavor, texture, and nutrition of perishable fruits and vegetables while prolonging their shelf life (i.e., defer microbial spoilage and natural physiological deterioration of the plant cells). Generally, the techniques used in food processing include blanching, dehydrating, canning, freezing, fermenting and pickling, and irradiating.

16 Carbohydrates (Bread, Cereal, Pasta)

Oatmeal; Cereal; Pasta/Noodles; Breakfast Bars; Bread; Cake; Seasonings, Grits, Flour, Ingredients

Corn processors and wheat millers convert corn and wheat into sweeteners, starches, proteins, flours, and bakery ingredients for use in producing bread, cereal, pasta, and pastries. Carbohydrates are an essential part of a healthy diet, and the U.S. government recommends that 50% of daily total calories is in the form of carbs. While all carbs break down into glucose, the healthiest carbs are fiber-rich complex carbs (vs. simple carbs found in sugary beverages, sweetened dairy products and white, refined grains like rice, pasta and bread) and ones that will be eaten in their closest-to-nature state. Examples of complex carbs are vegetables, fruit, pulses, unsweetened dairy products, and 100% whole grains (brown rice, quinoa, wheat and oats).

Selected Producers

Hormel; General Mills; WK Kellogg; Pepsi; Unilever

17 Snacks

Potato Chips; Popcorn; Chocolate Bars; Cookies; Corn/Tortilla Chips; Crackers; Pretzels; Candy and Gum

Selected Producers

Pepsi; Unilever; Conagra Brands; Kellanova; Campbell's; Nestlé; Utz Brands; Mondelez Int'l; Hershey's; McKee Foods; General Mills; Pepperidge Farm; Mars

The global snack food market was valued at $427 billion in 2020 and is projected to grow at a compound annual rate of 3.37% during the 2021-26 forecast period.

18 Animal Nutrition/Feed

Aquacultural Feed; Seed Additives; Cattle Feed; Poultry Feed; Dairy; Swine Feed

Food processing includes processing and selling formula feeds and animal health and nutrition products to ranchers and animal farms.

Selected Producers

Cargill; Tyson Foods; Land O' Lakes; Alltech

Sales of (1) Fruit and Vegetables and (2) Packaged Salad, Vegetable Oils, Bread, Cereal, Vegetables, Fruit, and Snacks

7 ANIMAL FEED PRODUCERS AND RANCHERS

Ranchers and Chicken Farmers

Animal Feed (alfalfa hay, oats and other grains, potatoes, and vitamin and mineral supplements) See #18.; Live Swine/Pigs, Live Calves, Live Chicks, Breeder Flocks, and Eggs

Selected Producers

Archer-Daniels-Midland; Conagra Brands; Cattle Ranchers; Louis Dreyfus; CHS Agricultural Cooperative

The ranch is where all beef cattle are born and raised. More than 90% of all ranches are family-owned and operated, with an average herd size of 40 head.

Sales of Live Swine, Calves and Chicks

8 RANCHERS, FEED LOTS AND DAIRY FARMERS

Feed Yard Owners

Live Cattle, Live Hogs, Live Chicken and Dairy Cows

Selected Producers

CHS Agricultural Cooperative; Dairy Farmers; Cattle Ranchers; Meatpackers; Feedlots

When they are ready, cattle are transported to a feed yard where they slowly transition to nutritionally balanced rations of grains and forages during their roughly 140-day stay. At the feed yards, animal nutritionists formulate cattle rations consisting of alfalfa hay, grains, and potato as well as vitamin and mineral supplements.

Sales of Live Hogs, Cattle, and Chicken

MEAT, EGG AND DAIRY PROCESSORS

19 Meat / Protein, Eggs, and Salt

Beef Products; Plant-Based Protein; Eggs; Poultry Products; Pork Products; Prude Salt Products

Headquartered in São Paulo, Brazil, JBS is the largest meat processing company in the world, producing factory processed beef, chicken and pork, and meat by-products.

Selected Producers

Tyson Foods; Pilgrims Pride/JBS; General Mills; Conagra Brands; Cargill; Bunge; Sanderson Farm; Hormel Foods; KraftHeinz

Operations related to processing live cattle, hogs and chickens involve fabricating meat carcasses into (a) primal and sub-primal meat cuts, (b) case-ready products and (c) specialty products such as hides and variety meats.

20 Dairy Products

Cheese Products; Milk; Yoghurt

Selected Producers

KraftHeinz; Danone; Dean Foods; Dairy Farmers

Sales of Processed Meat and Prepared Meat-Based Foods

9 AQUACULTURE INPUT SUPPLIERS AND BREEDERS

Aquaculture Nutrition and Equipment Providers

Aquaculture Feed, Additives, Ingredients; Water Filtration; Predator Control; Hatchery Supplies

Selected Producers

Archer-Daniels-Midland; Conagra Brands; Imperial Tropicals; Louis Dreyfus

Fish farm suppliers sell feed, feeders, water treatment and filtration systems, heating and cooling systems, hatchery supplies, predator control, tanks, hydroponics equipment, and lighting.

Sales of Aquaculture Feed and Equipment

10 SEAFOOD PRODUCERS

Top U.S. Commercial Fishing Ports/Fisheries

Dutch Harbor, Aleutian Islands, and Kodiak Alaska; New Bedford, Massachusetts; Reedville, Virginia; Empire-Venice, Louisiana; Honolulu, Hawaii

Nearly 50% of fish consumed are raised in fish farms (or "pisciculture"), enclosures where primarily tilapia, salmon, tuna, eel, and catfish are artificially bred and grown in captivity from egg to harvest. In 2018, 114.5 MMT of fish were harvested—finfish (43.5%), shellfish (14.1%), and crustaceans (6%). China, India, Indonesia Peru, and the U.S. produce the largest volumes of fish.

Sales of Live Fish and Other Aquatic Life

FISH AND SHELLFISH PROCESSORS

21 Seafood

Fish Products (Tuna, Salmon, Herring, Halibut, Tilapia); Shellfish Products (Lobster, Shrimp, Clams, Scallops, Oysters, Crab)

Without the fish processing sector, consumers wouldn't have access to the seafood products they regularly enjoy. Fish is a highly perishable food, so processing and packaging is necessary to keep fish fresh long enough to reach the shelves in stores, restaurants and homes.

Selected Producers

Mowi; Skretting; Red Chamber Group; Maruha Nichiro; Nippon Suisan Kaisha; Mitsubishi; Austevll; Dongwon Enterprise; Trident Seafoods; Thai Union

Fish processing generally involves the use of machines and manual action to (a) sort fish by size and species, (b) load fish into a machine to remove heads, (c) move fish to a cleaning machine to remove tails, scales and entrails, (d) remove fins, (e) wash thoroughly, and (f) complete the final processing steps of heating, freezing, controlling water activity (by drying or adding chemicals), and irradiating.

Sales of Processed Fish and Prepared Seafood

4 Food Retailing

Retail Foodservice. Foodservice operators include (a) retailers whose primary product line is food—grocery and convenience stores, restaurant chains, independent restaurants, caterers, vending machine owners–and (b) establishments where food is ancillary—hospitals, nursing homes, schools, universities, military bases, hotels, airlines, churches, drug stores, gas stations, movie theaters, amusement parks, and sports venues. Foodservice operators get their products primarily from wholesalers, but they may also buy some food directly from farmers or suppliers who work with farmers.

26 RETAILERS FOR HOME CONSUMPTION

Traditional Grocery Stores and Wholesale Clubs

The Kroger Co. (includes Jay C Food Stores, Baker's King Soopers, City Market, Foods Co., Owen's Food4Less, Ruler Foods, Mariano's, Fry's Food Stores, Ralphs, Gerbes, Pay Less Super Markets, Quality Food Centers, Harris Teeter, Pick 'n Save, Dillon's Food Stores, and Metro Market); Albertsons (includes Safeway, Star Market, Amigos, Carrs, Market Street, Vons, United Express, Randalls, Shaws, Acme, and Andronico's Community Markets); New Seasons; Publix Super Markets; Lidl; Hy-Vee; Winco Foods; Market Basket; Whole Foods Market (Amazon-Owned); Wegman's; Meijer; H.E. Butt Grocery (H-E-B); Aldi; The Fresh Market; SuperValu; Ahold Delhaize USA; Weis Markets; Winn-Dixie; Piggly Wiggly; Wakefern Food Corp. (a retailers' cooperative group of supermarkets, including ShopRite, Price Rite Marketplace, The Fresh Grocer, Dearborn Market, Gourmet Garage, and Fairway Market); Bi-Lo; Harvey's Supermarket; Ingles Market; Food Lion; Trader Joe's; SpartanNash (includes Ban 'n' Save and Sun Mart)

27 Other Stores

Big Box/e-Commerce Retailers: Walmart (includes Sam's Club); Target; Costco Wholesale

Convenience Stores: 7-eleven; Quik Trip; Kwik Trip

Drug Stores: CVS Health; Rite-Aid; Walgreens Boots Alliance; Giant Eagle Pharmacy

Discount Retailers/Dollar Stores: Dollar General; Dollar Tree; Family Dollar; 99 Cent Only

Sales of Groceries

ESTABLISHMENTS FOR NON-HOME CONSUMPTION

28 Large National Restaurant Chains

Quick Service: Yum Brands (Taco Bell, Pizza Hut, KFC); Subway; Wendy's; Chick-fil-A; JAB Holding Company (Krispy Kreme); McDonald's; Restaurant Brands International (Burger King Tim Horton's, Popeyes); Roark Capital's Inspire Brands (Arby's, Buffalo Wild Wings, Jimmy John's, Mister Donut, Dunkin' Donut, Sonic Drive-In, Baskin & Robbins); Subway

Fast Casual Dining: Chipotle Mexican Grill; Shake Shack; JAB Holding (Panera Bread); Starbucks; Inspire Brands (Jimmy John's)

Casual and Fine Dining Chains: Golden Gate Capital (Red Lobster, Bob Evans Restaurant, California Pizza Kitchen); Darden (Longhorn Steakhouse, Olive Garden); Applebee's; Brinker International (Maggiano's); Landry's Restaurants (McCormick & Schmick's, Landry's Seafood House, The Chart House, Bubba Gump Shrimp Co. ,Oceanaire Seafood Room)

These 10 companies control 50 of the biggest names in the chain restaurant business: Roark Capital, Yum Brands, Golden Gate Capital, JAB Holding, Restaurant Brands International, Darden, Sun Capital, Jollibee Foods, Bloomin' Brands, and Brinker International.

29 Other Commercial Establishments and Institutions

Gas Stations; Employer-Sponsored Cafeterias; Hospitals and Nursing Care Homes; School Cafeterias; Sports Arenas; Military Bases and Canteens; Vending Machines; Commercial Airlines; Hospitality/Hotel Chains; Colleges and Universities

30 Beverage Establishments

Starbuck's; JAB Holding (Caribou Coffee); Roark Capital (Seattle's Best Coffee, Dunkin' Donuts, and Tim Horton's); Sun Capital (Bar Louie); Costa Coffee; Bars and Pubs

Sales of Beverages

To Commercial Airlines

Simple Flying; Gate Gourmet; LSG Sky Chefs; Flying Food Group

The ability to taste sweet flavors and salt drops 15-20% and 20-30%, respectively, when traveling in airplanes at 30,000 feet. Some purveyors attempt to compensate for this loss by drastically increasing the levels of salt and sugar in their meals.

FOOD CONSUMED AT HOME

FOOD CONSUMED AWAY FROM HOME

5 Food Consumption

In-Home and Away-from-Home Markets. An estimated 67-80% of finished food and beverage products are consumed at home, and just over 20-33% is consumed away from the home at restaurants, bars, catered social, charitable and special events, sporting events, airports, hotels, and on common carriers (e.g., passenger railcars and commercial airlines).

HOME CONSUMPTION

31 Individuals and Families

Food Waste. Between 30-40% of food generated throughout the U.S. food supply chain ends up as waste. The amount of waste has tripled over the past 50 years which is faster than the population growth rate. Each year 108 billion pounds of food is wasted.

Obesity. The prevalence of obesity has increased dramatically in the U.S. since the mid-70s. Nearly 66% of adults are either overweight or obese.

Food Insecurity. The number of people across the U.S. who suffer from food insecurity is expected to increase to 50 million people in 2022 (15% of the U.S. population).

Household Expenditures. The top six categories as a percentage of U.S. household expenditures are: (1) housing (35%), (2) transportation (16%), (3) food (12%), (4) personal insurance (11.5%), (5) healthcare (8%), and (6) entertainment and alcoholic beverages (6%).

Farmers' Markets. Nearly 8% of local food sales are made directly to the consumer via farmers' markets.

Varieties of Diets. By reasons of religion, health preference or requirement, environmental protection, food availability, and/or prices, there is no longer a standard "meat-and-potatoes" diet. Today, it is not uncommon to have family members, friends, and work colleagues who follow a unique diet: Kosher, Gluten-free, Lactose-free, Vegetarian, Vegan, Low Carb (e.g., Atkins), Keto (high fat, low carb), and Paleo, to name a few.

Family Meals. Despite family mealtimes being hugely beneficial to kids, only 30% of families manage to eat together regularly.

Sales of Meals

AWAY-FROM-HOME CONSUMPTION

32 Restaurants and General

Restaurant Brands. Ten companies control more than 50 of the biggest names in the chain restaurant business, from Panera to Burger King.

Restaurant Chains. The most popular casual dining chain restaurants in the U.S. (in order of popularity by revenue) are Olive Garden, Applebee's Grill and Bar, Buffalo Wild Wings, Chili's Bar & Grill, Texas Roadhouse, Outback Steakhouse, Red Lobster, Cracker Barrel, The Cheesecake Factory, and Longhorn Steakhouse.

Fast Food Consumption. 36% of adult Americans dine out at fast food restaurants on any given day.

Meals, Ready-to-Eat. Meals, ready-to-eat are self contained, individual field rations in lightweight packaging bought by the U.S. Department of Defense for members of the armed services in combat or other field locations where food is not generally available. An instant MRE should be kept cool but need not be refrigerated. MREs can last around 3 years and are usually processed, canned or freeze-dried.

Protein Consumption. The annual worldwide consumption in 2020 (in million metric tons or MMT) of types of protein is: (1) fish (157MMT), (2) poultry (129 MMT), (3) pork (109 MMT), (4) beef and veal (70 MMT).

Seafood Consumption. According to the U.S. National Oceanic and Atmospheric Administration's (NOAA), Americans and are eating more fish now than ever before. On average, American consumers eat 19 pounds of seafood per year. The 10 most popular seafood items are (in order of popularity): shrimp, salmon, canned tuna, tilapia, Alaska pollock, pangasius (a staple in the Chinese diet), cod, catfish, crab, and clams.