



Archer-Daniels-Midland Ecosystem

Archer Daniels Midland
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Outside Relationships

Regulators	Capital	Suppliers	Customers
Business Regulation General U.S. Environmental Protection Agency (EPA) (General Regulation: Regulation, Permitting, and Settlement Orders Regarding Discharges, Leaks, Emissions, Disposal, Storage of Particulate Matter, Hazardous Waste, and Toxic Substances in the Water, Air and Soil; Remediation: Superfund Clean-up of Contaminated Sites); Renewable Fuels: Renewable Fuel Standard Program Regulation of Ethanol and Biodiesel, including Increase of Supply of Renewable Alternative Fuel Sources by Setting a Mandatory Renewable Fuel Standard) 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. 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; FTC: Consumer Protection, and DOJ: Foreign Corrupt Practices Law Enforcement) U.S. Dept of Commerce (Bureau of Industry and Security: Export Administration: Regulation of Export of Raw Materials, Finished Goods, and Information Handling; Export Licenses) Trade and Trading U.S. Commodity Futures Trading Commission (CFTC) (Regulation of Futures Commission Merchants Regarding Futures and Swap Related Trades of Agricultural Commodities) Food Safety U.S. Food & Drug Administration (FDA) (Regulation of Food Safety, Food Quality, Product Labels, Packaging, and the Food and Color Additive Approvals; Mandatory Recall Authority) Consumer Product Safety Commission (CPSC) (Product Safety Regulation) U.S. Department of Agriculture (USDA) (Food Product Safety and Quality Standards) U.S. Department of Homeland Security (DHS) (Record-Keeping Requirements for Facilities That Manufacture, Process, Pack, or Hold Food For Human Consumption)	Public Debt Holders Commercial Banks Hedge Counterparties	Soybeans, Soft Seeds (Cottonseed, Sunflower Seed, Canola Seed, Rapeseed, and Flaxseed), Wheat, Corn, Barley, Edible Beans, Additives, Fruit, and Other Agricultural Commodities Grovers and Farmers Grain Elevators Wholesale Merchants Ocean-Going, Deepwater Vessels Trucking Services Railcars Barges Container Freight Services Energy Companies (Including Renewable Green Diesel Manufacturers) U.S. and Export Markets (Peanuts and Peanut Derived Ingredients) Food and Feed Producers (Including Commercial Livestock and Poultry Producers) Industrial Product Producers (Including Paper) Chemical, Paint, Paper, and Other Industrial Manufacturers (Biosesol, Glycols, and Cotton Cellulose Pulp) Ag. Services & Oilseeds Customers U.S. and Export Markets (Peanuts and Peanut Derived Ingredients) Food and Feed Producers (Including Commercial Livestock and Poultry Producers) Industrial Product Producers (Including Paper) Chemical, Paint, Paper, and Other Industrial Manufacturers (Biosesol, Glycols, and Cotton Cellulose Pulp)	Bond Financing Working Capital Financing Agricultural Commodities, Foreign Currency and Interest Rate Derivatives

Archer-Daniels-Midland Company (a Delaware corporation)

Debt Structure

Debt (\$8.238B @ 12/31/22) Credit Ratings: A (S&P), A2 (Moody's), A (Fitch)

Lines of Credit: \$12.4B (6.21% Avg) (Includes Accounts Receivable Securitization Programs)	\$5B Commercial Paper Program: \$0.3B Outstanding	Zero Coupon Exchangeable Bonds Due 2023: \$304M (0%) (Exchangeable for 50,597 Shares of Wilmar International for Each 200,000 Principal Amount of Bonds)	3 Series of Notes Due 2023-2025: €1.250B (1%-1.75%)	6 Series of Notes Due 2023-2025: \$4.508B (2.5%-4.5%)	4 Debenture Series Due 2027-2031: \$552M (4.479%-7.5%)	7 Debenture Series Due 2032-2037: \$1.647B (4.016%-6.95%)
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Equity Structure

Share Repurchase Program Authorized: 200.0 Million Shares Expiration: December 31, 2024 Balance: 87.812 Million Shares	Preferred Stock Authorized: 500,000 Shares Issued: None Record Holders: None	Common Stock Authorized: 1.00 Billion Shares Outstanding: 1.00 Billion Shares Record Holders: 8,153
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Governance

Board of Directors

Juan R. Luciano (Chair, E)	Terrell K. Crews (E, A, S)	Francisco Sanchez (A, S)	Committees: Executive ("E"), Nominating / Corporate Governance ("N"), Compensation / Succession ("C"), Audit ("A"), Sustainability / Corporate Responsibility ("S")
Michael S. Burke (N, C)	Donald Felsing (Lead, E)	Debra A. Sandler (N, A)	
Theodore Colbert III (A, S)	Suzan Harrison (E, C, S)	Lei Zhang Schlitz (C, S)	
James C. Collins Jr. (C, S)	Patrick J. Moore (E, N, A)	Kelvin Westbrook (E, N, C)	

Senior Leadership

President, Chief Executive Officer - Juan R. Luciano	Senior VP, Chief Information Officer - Kristy Folkner	Senior VP, General Counsel & Secretary - D. Cameron Findley	VP, Corporate Controller - Molly Strader Fruit	President, Global Foods - Leticia Gonçalves
Senior VP, CFO - Vikram Luthar	Senior VP, Chief Science Officer - Todd A. Wery	Chief Counsel, Corporate, Securities, and M&A - Thuy Vo	President, Latin America and Africa - Ismael Roig	Senior VP, President, Agricultural Services and Oilseeds - Greg A. Morris
Senior VP, Global Operations - Veronica L. Braker	Senior VP, Strategy and Innovation - Ian Pinner	VP, Global Chief Compliance Officer - Ben Bard	President, Europe, Middle East and Africa - Vincent F. Macocochi	Senior VP, President, Nutrition, Chief Sales and Marketing Officer - Vincent F. Macocochi
Senior VP, Chief HR Officer, Chief Diversity Officer - Jennifer Weber	Senior VP, Global Supply Chain & Procurement - Camille Batiste	Group VP, ADM Investor Services - John P. Stott	President, Bio Solutions and International Com - Pierre-Christophe Duprat	Senior VP President, Carbohydrate Solutions - Christopher M. Cuddy

Operations

Ag Services and Oilseeds (2022 Revenues: \$83.86B Billion)

The Ag Services and Oilseeds segment includes global activities related to the origination, merchandising, transportation, and storage of agricultural raw materials, and the crushing and further processing of oilseeds such as soybeans and soft-seeds (cottonseed, sunflower seed, canola, rapeseed, and flaxseed) into vegetable oils and protein meals.

Business Units

Crushing (\$13.13B Billion)

This division crushes and further processes agricultural raw materials and oilseeds such as soybeans and soft seeds (e.g., cottonseed, sunflower seed, canola, rapeseed, and flaxseed) into (1) crude vegetable oils, which are sold as is to manufacturers of renewable green diesel, and (2) oil seed protein meals, which are principally sold to third parties to be used as ingredients in commercial livestock and poultry feeds.

Oilseeds' Products

Vegetable Oils	Protein Meals
Soybean Oil, Corn Oil, Palm Oil, Kernel Oil, Canola Oil, High-Oleic Soybean Oil, Hydrogenated & Interesterified Oils, Coconut Oil, Custom Oil Blends, Palm Kernel Oil, Sunflower Oil	Pea Protein Powder, Soy Protein Concentrate, Soy Flour & Grits, Protein Isolates, Wheat Protein, Textured Protein

Refined Products and Further Processing (\$13.24B Billion)

Crude vegetable oils produced by this division's crushing activities and not sold "as is" are further processed (i.e., refined, blended, bleached, and deodorized) into salad oils. Salad oils are sold "as is" or are further processed by hydrogenating and/or interesterifying into margarine, shortening, and other food products. Partially refined oils are used to produce biodiesel and glycols or are sold to other manufacturers for use in chemicals, paints, and other industrial products. Cotton cellulose pulp is manufactured and sold to the chemical, paper, and other industrial markets.

Refined Products

Salad Oils: Non-GMO Soybean Oil, High-Oleic Soybean Oil, Dewaxed Corn Oil, Linseed Oil	Margarine, Shortening, Biopolymers, Biodiesels
Cotton Cellulose Pulp, Propylene Glycol	

Agricultural Services (\$53.18B Billion)

The Ag Services Business Unit provides grain sourcing, handling and transportation, export/import distribution services, and trade finance.

Grain Sourcing, Handling, and Transportation Network: ADM provides reliable and efficient sourcing, handling and transportation services to customers and ADM's agricultural processing operations. The transportation network includes barge, ocean-going vessel, truck, rail, and container freight services.

Export, Import, Distribution: Agricultural commodity and feed product import, export, and global distribution services.

Trade Finance: ADM engages in various structured trade finance activities to leverage its global trade flows.

Agricultural Commodities

Corn, Milo, Rice, Peanuts, Peanut Oil, Peanut Flour, Oats, Oilseeds, Barley, Wheat, Tree Nuts, Nut Butters
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Competitors

Monsanto, Olam, ACP, adecoagro, 中粮国际, Tyson, Wilmar, LDC, TOCWA, BUNGE, Cargill, CHS, EFKO

Carbohydrate Solutions (2022 Revenues: \$16.33B Billion)

The Carbohydrate Solutions segment is engaged in corn and wheat wet and dry milling and other activities for the food and beverage industry.

Business Units

ADM converts corn and wheat into products and ingredients used in the food and beverage industries, including sweeteners, corn and wheat starches, syrup, glucose, wheat flour, and dextrose. Other Carbohydrate Solutions include products including citric acids, which are used in various food and industrial products.

Starches and Sweeteners (\$10.25B Billion)

Dextrose and starch are used as feedstocks in other downstream processes. This unit includes ethanol production from wet mills.

Fermentation: By fermentation of dextrose, this segment produces alcohol and other food and animal feed ingredients.

Ethyl Alcohol: Ethyl alcohol is produced for industrial use in products such as hand sanitizers and ethanol for use in gasoline due to its ability to increase octane as an extender and oxygenate.

Starches

Sorghum Flour, Wheat Starch, Tapioca Starch, Corn Starch
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Sweeteners

Erythritol, Corn Syrup, Honey, Dextrose, Invert Sugar, Fruit Syrup, Sucralose, Molasses

Liquid Sucrose, Tapioca Syrup, Fruit Sweetener, Granulated Sugar

Monk Fruit Sweetener, Crystalline Fructose, High-Fructose Corn Syrup, Reduced Sugar Glucose Syrup

Vantage Corn Processors (\$3.71B Billion)

Vantage corn processors include ADM's dry mills used to produce medium-to-fine grind meal that can be used as food products, animal feed, or fuel-ethanol production.

Corn Gluten Feed and Meal: Corn gluten feed and meal, and distillers' grains are produced for use as animal feed ingredients.

Corn Germ: Corn germ, a by-product of the wet milling process, is further processed into vegetable oil and protein meal.

Further Processed Products

Acidulants, Xanthan, Lecithin, Corn Germ, Ethanol
Corn Flour & Corn Gluten, Denatured Ethyl Alcohol, Potassium Citrate, Sodium Citrate Anhydrous
Corn-Based Powder, Sodium Citrate Dihydrate, Soy Methyl Ester, Grain Neutral Spirits

Competitors

The Andersons, LDC, DOW, KERRY, adecoagro

Nutrition (2022 Revenues: \$7.83B Billion)

The Nutrition segment manufactures and sells various ingredients and solutions into end markets including food, beverages, nutritional supplements, and feed, premix, and additives for livestock, aquaculture, and pet food.

Business Units

Human Nutrition

The Human Nutrition Division manufactures, processes, sells, and distributes a wide array of ingredients including plant-based proteins, natural flavors, flavor systems, natural colors, emulsifiers, edible beans, soluble fiber, polyols, hydrocolloids, probiotics, prebiotics, enzymes, botanical extracts, and other specialty food and feed ingredients for human consumption.

Human Nutrition Ingredients & Solutions

(Available in whole dehydrated, grits, meals and powders)

Black Bean, Chickpea, Green Pea, Red Lentil, Navy Bean, Fava Bean, Green Lentil, Pinto Bean, Pink Bean, Yellow Pea, Lima Bean, Cranberry Bean, Mayocoba Bean, Small Red Bean, Light Red Kidney Bean, Dark Red Kidney Bean, Great Northern Bean
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Edible Beans

Vanilla Bean, Mint Extract, Mint Oil, Probiotics, Sorbitol, Emulsifiers, Lecithin, Menthol, Mannitol, Marinades, Fruit Puree, Icings, Maltitol, Prebiotics, Spice Paste, Meat Broths, Glazes, Citrus Juices, Enzymes, Citrus Oils

Fruit Extracts, Soluble Fiber, Hydrocolloids, Vanilla Extract, Natural Colors, Bakery Mixes, Seafood Base, Poultry Broth

Fruit Concentrate, Pastry and Pie Fillings, Dairy Concentrate, Vegetarian Base, Botanical Extracts

Animal Nutrition

The Animal Nutrition Division includes activities related to the processing and distribution of formula feeds and animal health and nutrition products and the manufacturer of contract and private label pet treats and foods.

Animal Nutrition Feeds and Products

Equine Feed Solutions, Aquaculture Solutions, Dog and Cat Feed Solutions, Poultry Feed Solutions, Deer, Elk, and Game Bird Feed Solutions, Swine Feed Solutions, Rabbit Feed Solutions, Feed Additives, Feed Ingredient

Competitors

CONAGRA, KERRY, adecoagro, Cargill, TATE & LYLE, Ingredion, Firmenich

Other Business (2022 Revenues: \$396 Million)

ADM Investor Services (ADMIS) earns revenue from commissions and brokerage income on commodities trades, and Agrinational Insurance Company (Agrinational) is ADM's captive insurance business.

Business Units

Investor Services

ADMIS, ADM's investor services business, provides commodities brokerage services such as futures execution, clearing, market analysis, and risk management services to retail, commercial, and institutional clients in the U.S. (from its Chicago headquarters), Europe (from its London office), and Asia (from offices in Hong Kong, Taiwan, Singapore and Shanghai).

United States: Headquartered in Chicago, Illinois, it has 250 affiliated locations throughout the United States, including its Archer Financial Services subsidiary. ADM investor services is a registered futures commission merchant and a clearing member of all principal U.S. commodities exchanges.

Europe & Asia: ADM offers commodities brokerage service in Europe and Asia through (a) London-based ADM Investor Services International Ltd., a member of several derivative and commodity exchanges and clearing houses in Europe, and (b) ADMIS Singapore Pte. Ltd., a clearing member of the Singapore exchange, and ADMIS Hong Kong Ltd.

Insurance Services

Agrinational and its subsidiaries provides insurance coverage for certain property, casualty, marine, credit, medical, and other miscellaneous risks of the ADM. Agrinational also participates in certain third-party reinsurance arrangements. In 2020, Agrinational acquired a 50% stake in Agriserve Inc., which provides affordable crop income protection to farmers.

Ag. Services and Oil Seeds Facilities (Processing Capacity: 117,000 Metric Tons; Procurement Capacity: 19,59M Metric Tons)

Carbohydrates Solutions Facilities (Processing Capacity: 18,000 Metric Tons; Procurement Capacity: 662,000 Metric Tons)

Nutrition Facilities (Processing Capacity: 189,000 Metric Tons; Procurement Capacity: 346,000 Metric Tons)

Competitors

EDF MAN, NCDEX, REFCO, EUREX

Outside Relationships

Customers	Suppliers	Capital	Regulators
Farmers Retail Clients Commercial Clients Institutional Clients	Professional Services Firms (Audit Services) Ernst & Young (EY) Jones and Thomas (Advertising Services) THOMAS Akin, Gump, Rick Carme Consulting, LLC (Lobbying Services) Akin Gump Covington & Burling LLP (Legal Services) COVINGTON Oracle (Cloud Computing Services) ORACLE Tata Consultancy (IT Consulting Services) TCS Reinsurance Agrinational Insurance Company (ADM's Captive Insurance Subsidiary) ADM Agrinational Insurance Company	Dividends and Common Stock Repurchases Equity Capital Significant Shareholders The Vanguard Group (10.96%) Capital Research & Management (10.46%) CAPITAL GROUP State Farm Investment Management (8.54%) State Farm SS&A Funds Management (5.80%) STATE STREET BlackRock Fund Advisors (4.90%) BlackRock Institutional Ownership 82.46%	Business Regulation U.S. Securities and Exchange Commission (Regulation of Offers and Sales of Securities, Material Event Disclosure and Reporting Requirements, Anti-Bribery Law Record Keeping Requirements) New York Stock Exchange (NYSE) (Listing, Maintenance and Corporate Accountability Rules) Public Company Accounting Oversight Board (Requirement of Financial Documents to be Free of Material Misstatement, Assessment of the Risks of Material Misstatement, and Procedures to Respond to Those Risks) PCAOB Taxes & IP U.S. Patent and Trademark Office (USPTO), and U.S. Copyright Office (USCO) (Patent Registrations, Challenges, and Enforcement; Trademark and Copyright Registrations) Internal Revenue Service (IRS) (Regulation of Corporate Income, Withholding and Payroll Taxes) IRS Key Company Data (as of 12/31/2022) Overview: Chicago, Illinois-based Archer-Daniels-Midland Company is one of the world's leading producers of ingredients for sustainable nutrition. From staple foods, such as flour, oils and sweeteners, to innovative alternatives like plant-based meat and dairy solutions, ADM offers the industry's broadest portfolio of food and beverage solutions. The company is also a leader in animal nutrition. Share Data NYSE Ticker Symbol: ADM Share Price: \$75.38 (05/12/2023) Earnings Per Share (Trailing 12 Months): \$7.97 Forward Annual Dividend: \$1.80/share Market Capitalization: \$41.26B (05/12/2023) Financial Highlights Statement of Earnings Net Revenues: \$101.556B Cost of Products Sold: \$93.956B Gross Profit: \$7.570B (Margin: 7.45%) Earnings Before Tax: \$5.233B Net Earnings: \$4.34B Balance Sheet Total Assets: \$59.774B Total Liabilities: \$35.158B Equity: \$24.314B Cash Flow From Operations: \$3.478B From Investing: (\$1.4B) From Financing: (\$2.499B) Financial Return Return on Equity: 17.85% Recent Developments Genesis Consortium: In June 2021, ADM announced its collaboration with the Genesis Consortium, a global alliance of venture capital firms and companies supporting startups that leverage biology to promote human and planetary health. Growing Nutrition Segment: ADM has increased its exposure to higher-growth, value-added assets in its Nutrition segment through organic investments and acquisitions of WILD Flavors GmbH (human nutrition), Neovia SAS (animal nutrition), and Biopolis SL (health and wellness).

May 2023

thinking
One Page Thinking, LLC
www.onepagethinking.net

Singapore Institute of Food and Biotechnology Innovation (Part of the Agency for Science, Technology and Research)

Sectors	1 Farm Production	2 Food and Beverage Processing	3 Wholesale Food Distribution	4 Food Retailing	5 Food Consumption
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Overview. At \$1.5 trillion in annual sales, the U.S. food and beverage 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.

1 Farm Production **Food and Beverage Production.** Food and beverage production is the use of cultivated plants or animals to sustain and enhance human life. It encompasses (1) cultivating the soil, planting, growing and harvesting crops (**agriculture**), (2) rearing, feeding, and managing animals (**meat production**), (3) raising fish (**aquaculture**), (4) growing plants (**horticulture**), (5) growing fruits, vegetables, and plants (**horticulture**), and (6) 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 sold mainly to foodservice wholesalers or other processors.

2 Food and Beverage Processing **Transformation.** Food processing is the transformation of agricultural and other raw 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** such as cotton (one of the top 10 crops produced in the U.S. every year), wool, and 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 Food 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) the **food consumed at-home** (retailers, grocery stores, and convenience stores) and (2) the **food consumed away-from-home** (restaurants, schools, military bases, and hospitals).

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.

5 Food Consumption **In-Home and Away-from-Home Markets.** An estimated 67-70% of finished food and beverage products are consumed at home, and just over 20-3% 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).

A Beverage Products

The U.S. beverage industry produces ready-to-drink alcoholic beverages (38%) and non-alcoholic beverages (62%). It generates \$410 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 heavy equipment, including 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, and animal feed).

SEEDS AND CROP PROTECTION PRODUCERS

SUPPLIERS OF BEVERAGE-RELATED FARM INPUTS

Beverage-Related Seeds and Water	Seed Cane	Wheat	Hops
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SUGAR AND BEVERAGE CROP PRODUCERS

Beverage-Related Crops and Water	Sugar	Agave	Wheat
Sugar Cane/Beets	Corn		

FARM LABOR

SUPPLIERS OF AGRICULTURE-RELATED FARM INPUTS

Vegetable, Grass, Fruit, and Grain Seeds / Nuts	Fertilizer	Seed Treatment	Fruit Seeds
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CROP GROWERS AND COOPERATIVES

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	Soybean and Oil Crops/Seeds (peanut, sunflower seed, canola, flax)
	Rice (short, medium, and long grain)	Fruits (tomatoes, beans, peas, lentils)	Tree Nuts (almond, walnuts)

FARM EQUIPMENT SUPPLIERS

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

ANIMAL FEED SUPPLIERS

FEED LOTS

Feed Yard Owners	Feed Lots
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MEAT, EGG AND DAIRY PROCESSORS

MEAT / Protein, Eggs, and Salt

Beef Products	Pork Products	Eggs	Dairy Products
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SEAFOOD PRODUCERS

SEAFOOD PROCESSORS

Fish Products	Seafood
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RESTAURANTS, SCHOOLS, MILITARY BASES, HOTELS, AIRLINES, HOSPITALS, SCHOOLS, ENTERTAINMENT VENUES

WHOLESALE FOOD DISTRIBUTORS

WHOLESALE FOOD DISTRIBUTORS (AT-HOME CONSUMPTION)

To Traditional Grocery Stores

Associated Wholesale Grocers	United Natural Foods Inc./SuperValu
Sysco Corporation	C&S Wholesale Grocers Inc.
US Foods Holding Co.	Metro Inc. (Canadian distributor)
Performance Food Group Company	Synergy Brands Inc. (Product range includes a wide range of packaged meals and spices)
International Wholesale	Local and specialty distributors (who offer a limited selection of custom-cut meat, seafood, specialty produce, and specialty imports) and brochure distributors (who offer a full line of food products and kitchen supplies) sell products to foodservice operators on a daily basis.

WHOLESALE FOOD DISTRIBUTORS (AWAY-FROM-HOME CONSUMPTION)

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

Selected Distributors	Key Transport Suppliers
SYGMA (a Sysco business unit and distributor to large national restaurant chains—KFC, Taco Bell, Steak 'n Shake, Arby's)	Navistar International (Trucks, Tractor, Railway Car, etc.)
Thermo King (Truck, Trailer, Railway Car, etc.)	

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

ESTABLISHMENTS FOR NON-HOME CONSUMPTION

Large National Restaurant Chains	Fast Casual Dining
Yum Brands (Taco Bell, Pizza Hut, KFC)	Chipotle Mexican Grill
Subway	Shake Shack
Wendy's	JAB Holding (Panera Bread)
Chik-fil-A	Starbucks

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

AWAY-FROM-HOME CONSUMPTION

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 (MRE): 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. They 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 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.

Sectors	1 Farm Production	2 Food and Beverage Processing	3 Wholesale Food Distribution	4 Food Retailing	5 Food Consumption	
<p>Overview. At \$1.5 trillion in annual sales, the U.S. food and beverage 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.</p>	<p>Food and Beverage Production. Food and beverage production is the use of cultivated plants or animals to sustain and enhance human life. It encompasses (1) cultivating the soil, planting, growing and harvesting crops (agriculture), (2) rearing, feeding, and managing animals (meat production), (3) raising fish (aquaculture), (4) growing flowering plants (floriculture), (5) growing fruits, vegetables, and plants (horticulture), and (6) 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 sold mainly to foodservice wholesalers or other processors.</p>	<p>Food and Beverage Processors. Companies involved in food and beverage production include breeding operators, farms (e.g., crops and certain animals), greenhouses and nurseries that grow flowers, orchards, ranches, and tree and sod farms. On the periphery are elevator operators that (a) store raw materials before the production begins or (b) store, handle, or move intermediate goods.</p>	<p>Transformation. Food processing is the transformation of agricultural and other raw 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 such as cotton (one of the top 10 crops produced in the U.S. every year), wool, and 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).</p>	<p>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) the food consumed at-home (retailers, grocery stores, and convenience stores) and (2) the food consumed away-from-home (restaurants, schools, military bases, and hospitals).</p>	<p>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.</p>	<p>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).</p>

A Beverage Products	SEEDS AND CROP PROTECTION PRODUCERS	SUGAR AND BEVERAGE CROP PRODUCERS	BEVERAGE MAKERS	WHOLESALE FOOD DISTRIBUTORS	GROCERY AND OTHER FOOD RETAILERS	DINING IN
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<p>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.</p>						
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B Agricultural Products	FARM LABOR	CROP GROWER AND CO-OPS	CROP PROCESSORS	WHOLESALE FOOD DISTRIBUTORS	GROCERY AND OTHER FOOD RETAILERS	DINING IN
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<p>The key inputs to the agricultural production of grasses, vegetables, and fruit are seeds, farm equipment, crop protection products, and labor.</p> <p>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.</p> <p>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.</p> <p>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).</p> <p>Farm Equipment. Various companies manufacture and sell to crop growers a variety of large and mid-size tractors, combines, pickers, harvesters and loaders, soil preparation, seeding, application, and crop care equipment, and hay and forage equipment.</p> <p>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.</p>		<p>Vegetables</p>	<p>Processed Cooking Oils, Vegetables, and Related Snacks</p>			
<p>Farm Labor</p>	<p>Grains</p>	<p>Processed Grains, Bread and Other Carbohydrates</p>				
<p>Farm Equipment Suppliers</p>	<p>Nuts</p>	<p>Processed Nuts, Beans and Related Snacks</p>				
<p>Farm Equipment Suppliers</p>	<p>Beans</p>	<p>Processed Fruit</p>				

C Animal Production	ANIMAL FEED SUPPLIERS	RANCHERS AND FEED LOTS	MEAT AND EGG PROCESSORS	DAIRY PROCESSORS	WHOLESALE FOOD DISTRIBUTORS	GROCERY AND OTHER FOOD RETAILERS	DINING OUT
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<p>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).</p>							
<p>Animal Production</p>	<p>Animal Feed Suppliers</p>	<p>Ranchers and Feed Lots</p>	<p>Meat and Egg Processors</p>	<p>Dairy Processors</p>			
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D Aquaculture Products	FISH FARM FEED AND EQUIPMENT SUPPLIERS	SEAFOOD PRODUCERS	SEAFOOD PROCESSORS	WHOLESALE FOOD DISTRIBUTORS	GROCERY AND OTHER FOOD RETAILERS	DINING OUT
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<p>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).</p>						
<p>Aquaculture Products</p>	<p>Fish Farm Feed and Equipment Suppliers</p>	<p>Seafood Producers</p>	<p>Seafood Processors</p>			

FOOD CONSUMED AT HOME MARKET

FOOD CONSUMED AWAY FROM HOME MARKET

Food Supply Chain in the United States: Key Players

Sectors	1 Farm Production	2 Food and Beverage Processing	3 Wholesale Food Distribution	4 Food Retailing	5 Food Consumption	
<p>Overview. At \$1.5 trillion in annual sales, the U.S. food and beverage 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.</p>	<p>Food and Beverage Production. Food and beverage production is the use of cultivated plants or animals to sustain and enhance human life. It encompasses (1) cultivating the soil, planting, growing and harvesting crops (agriculture), (2) rearing, feeding, and managing animals (meat production), (3) raising fish (aquaculture), (4) growing plants (horticulture), (5) growing fruits, vegetables, and plants (horticulture); and (6) 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 sold mainly to foodservice wholesalers or other processors.</p> <p>Food and Beverage Producers. Companies involved in food and beverage production include breeding operators, farms (e.g., crops and certain animals), greenhouses and nurseries that grow flowers, orchards, ranches, and tree and sod farms. On the periphery are elevator operators that (a) store raw materials before the production begins or (b) store, handle, or move intermediate goods.</p>	<p>Transformation. Food processing is the transformation of agricultural and other raw 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 such as cotton (one of the top 10 crops produced in the U.S. every year), wool, and 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).</p>	<p>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) the food consumed at-home (retailers, grocery stores, and convenience stores) and (2) the food consumed away-from-home (restaurants, schools, military bases, and hospitals).</p>	<p>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.</p>	<p>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).</p>	
<p>A Beverage Products</p> <p>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.</p>	<p>SEEDS AND CROP PROTECTION PRODUCERS</p> <p>Owned by Corteva CORTEVA agriscience</p> <p>PIONEER BRAND SEEDS</p> <p>BAYER CHS</p> <p>BASF</p>	<p>SUGAR BEVERAGE CROP PRODUCERS</p> <p>Amalgamated Sugar</p> <p>CH</p> <p>American Crystal Sugar Company</p>	<p>BEVERAGE MAKERS</p> <p>Coca-Cola STARBUCKS COFFEE Keurig DrPepper</p> <p>PEPSICO Mondelēz International</p> <p>ABInBev Unilever MOLSON Coors</p> <p>KIRIN Kraft Heinz Red Bull</p> <p>Heineken DIAGEO Pernod Ricard</p>	<p>WHOLESALE BEVERAGE DISTRIBUTORS</p> <p>PEPSICO Coca-Cola</p> <p>ABInBev DIAGEO</p> <p>MOLSON Coors</p> <p>KIRIN Pernod Ricard</p>	<p>GROCERY AND OTHER FOOD RETAILERS</p> <p>Kroger Publix</p> <p>Proposed Albertsons Merger into Kroger Pending Antitrust Clearance</p> <p>TARGET amazon</p> <p>WHOLE FOODS MARKET</p> <p>Walmart Sam's Club piggly wiggly</p> <p>CVS HyVee</p> <p>Walgreens 7 ELEVEN</p> <p>QT QuikTrip</p>	<p>DINING IN</p>
<p>B Agricultural Products</p> <p>The key inputs to the agricultural production of grasses, vegetables, and fruit are seeds, farm equipment, crop protection products, and labor.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p>	<p>FARM LABOR</p> <p>FARM EQUIPMENT SUPPLIERS</p> <p>JOHN DEERE CNH INDUSTRIAL Kubota</p> <p>TSC TRACTOR SUPPLY CO AGCO</p>	<p>CROP GROWERS AND COOPERATIVES</p> <p>LARSEN FARMS</p> <p>Scully Farms</p> <p>LAWRENCE FARMS ORCHARDS</p> <p>CHS</p> <p>FRUIT GROWERS</p> <p>GEBBERS FARMS EVANS Stemilt</p> <p>Dole BORTON FRUIT</p>	<p>CROP PROCESSORS</p> <p>ADM General Mills Cargill</p> <p>BAYER Kellogg's CHS</p> <p>Campbell's Mondelēz International PEPSICO</p> <p>Kraft Heinz DANONE</p> <p>Dole Unilever Nestle</p> <p>CONAGRA BRANDS HERSHEY'S</p>	<p>WHOLESALE FOOD DISTRIBUTORS</p> <p>US FOODS Sysco SYGMA</p> <p>Owned by Berkshire Hathaway BERKSHIRE HATHAWAY INC. MELANE</p> <p>Owned by United Natural Foods unfi SUPERVALU</p> <p>Owned by C&S Wholesale Grocers Wakefern FOOD CORP.</p> <p>INTERNATIONAL WHOLESALE.COM</p> <p>Owned by GSC Enterprises BRENHAM GSC</p>	<p>RESTAURANTS</p> <p>Owned by Yum! Brands KFC CORNER BAKERY McDonald's</p> <p>Pizza Hut TACO BELL Denny's STARBUCKS COFFEE</p> <p>Chick-fil-A OLIVE GARDEN Perkins</p> <p>Owned by Roark Capital/Inspire Brands INSPIRE SONIC GATES BAR-B-Q Cracker Barrel</p> <p>DUNKIN' Arby's BURGER KING POPEYES Tim Hortons</p>	<p>DINING OUT</p>
<p>C Animal Production</p> <p>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 produce 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).</p>	<p>ANIMAL FEED SUPPLIERS, RANCHERS AND FEEDLOTS</p> <p>Cargill ADM Vermejo Park Ranch KING RANCH WAGONER CATTLE COMPANY</p>	<p>MEAT AND EGG PROCESSORS</p> <p>Tyson JBS Sanderson Farms DANONE Kraft Heinz Dean</p> <p>PERDUE pilgrim's Hormel Foods</p> <p>Smithfield. Good food. Responsibly.</p>	<p>DAIRY PROCESSORS</p> <p>DFA DANONE Kraft Heinz Dean</p> <p>Owned by GSC Enterprises BRENHAM GSC</p>	<p>WHOLESALE SEAFOOD DISTRIBUTORS</p> <p>Cleanwater HIGH LINER FOODS TRI MARINE</p> <p>Mezzetta Suisan</p>	<p>SEAFOOD RESTAURANTS</p> <p>Red Lobster LPG JOHN SILVERS M&S</p> <p>CAPTAIN D'S BUBBA GUMP KRAB QUEENZ JOE'S CRAB SHACK</p>	
<p>D Aquaculture Products</p> <p>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).</p>	<p>FISH FARM FEED AND EQUIPMENT SUPPLIERS</p> <p>LDC Imperial TROPICALS GLIDDEN PT. OYSTER FARMS ADM CONAGRA BRANDS</p>	<p>SEAFOOD PRODUCERS</p> <p>Suisan RED CHAMBER Dongwon 동원F&B Trident PacificSeafood MARUHA NICHIRO</p>	<p>SEAFOOD PROCESSORS</p> <p>Dongwon 동원F&B FCF Co., Ltd. RED CHAMBER Mezzetta PacificSeafood Trident MARUHA NICHIRO Suisan</p>	<p>WHOLESALE SEAFOOD DISTRIBUTORS</p> <p>Cleanwater HIGH LINER FOODS TRI MARINE Mezzetta Suisan</p>	<p>SEAFOOD RESTAURANTS</p> <p>Red Lobster LPG JOHN SILVERS M&S</p> <p>CAPTAIN D'S BUBBA GUMP KRAB QUEENZ JOE'S CRAB SHACK</p>	

FOOD CONSUMED AT HOME

FOOD CONSUMED AWAY FROM HOME

Sectors **1 Farm Production** **2 Food and Beverage Processing** **3 Wholesale Food Distribution** **4 Food Retailing** **5 Food Consumption**

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Food and Beverage Production. Food and beverage production is the use of cultivated plants or animals to sustain and enhance human life. It encompasses (1) cultivating the soil, planting, growing and harvesting crops (**agriculture**), (2) rearing, feeding, and managing animals (**meat production**), (3) raising fish (**aquaculture**), (4) growing flowering plants (**horticulture**), (5) growing fruits, vegetables, and herbs (**silviculture**), and (6) 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 sold mainly to foodservice wholesalers or other processors.

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A Beverage Products

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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 America's favorite beverage segment, representing 25% 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.

Selected Producers

Corteva Agriscience	Bayer (includes Monsanto)	FMC	ChemChina (includes Syngenta)
BASF			

2 SUGAR AND OTHER BEVERAGE-RELATED CROP PRODUCERS

Beverage-Related Crops and Water

Sugar Cane/Beets	Agave	Sugar is the general name given to the short-chain carbs that give food a sweet taste such as sucrose, fructose, and glucose. However, sugar has many other forms and names on labels—e.g., beet, cane, brown, date, buttered caster, coconut, invert, golden, muscovado, palm organic raw, confectioner's (powdered), or rapeseed sugar, barley malt, cane juice crystals, corn sweetener, crystalline fructose, dextran, malt powder ethyl maltol, fruit juice concentrate, maltodextrin, maltose, panela, and evaporated cane juice.
Corn	Wheat	
Potatoes	Fruit	

Selected Producers

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

11 Ingredients Processing

Sugar (White Granulated, Brown, Baker's/Superfine, Powdered, Organic)	Juices	Water and Flavored Water	Powdered Drinks
Corn Syrup	Carbonated Soft Drinks	Alcoholic Beverages	Sports and Energy Drinks
Maltng Barley	Coffee and Tea		

12 BEVERAGE MAKERS

Beverage Processors

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

13 Packaging

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

Selected Producers

Activ	Metal Container Corp.	Crown Holdings	Ball	Ardagh Group
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22 WHOLESALE (for At-Home Consumption Market)

To Traditional Grocery Stores

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

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

23 (for Away-From-Home Consumption Market)

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.)	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)
Wakefern Food Corporation	International Wholesale (specializes in food distribution to dollar stores, and small retail stores)	McLane Company (a Berkshire Hathaway-owned company)		

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

U.S. Foods	National Food Group	Sysco
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There over 8,000 hospitals, 2,800 rehabilitation centers, 38,700 nursing and retirement homes, 9,600 assisted living facilities, and 9,000 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.

25 To Commercial Airlines

Simple Flying	Gate Gourmet	LSG Sky Chefs	Flying Food Group
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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.

26 WHOLESALE (for Non-Home Consumption Market)

Large National Restaurant Chains

Yum Brands (Taco Bell, Pizza Hut, KFC)	Chipotle Mexican Grill	Shake Shack
Subway	JAB Holding (Panera Bread)	Starbucks
Wendy's	Chik-fil-A	Starbucks
JAB Holding Company (Krispy Kreme)	Inspire Brands (Jimmy John's)	
McDonald's		
Restaurant Brands International (Burger King, Tim Hortons, Popeyes)	Golden Gate Capital (Red Lobster, Bob Evans Restaurant, California Pizza Kitchen)	Darden (Longhorn Steakhouse, Olive Garden)
Roark Capital's Inspire Brands (Arby's, Buffalo Wild Wings, Jimmy John's, Mister Donut, Dunkin' Donut, Sonic Drive-In, Baskin & Robbins)		
Subway	Brinker International (Maggiano's)	
	Landry's Restaurants (McCormick & Schmick's, Landry's, Bubba Gump Shrimp Co., Oceanaire Seafood Room.)	

Ten 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 Brands, Jollibee Foods, Bloomington Brands, and Brinker International.

27 ESTABLISHMENTS FOR NON-HOME CONSUMPTION

Quick Service

Walmart (includes Sam's Club)	7-eleven	Quik Trip	Kwik Trip			
Target						
Costco Wholesale						
Drug Stores	CVS Health	Discount Retailers/Dollar Stores	Dollar General	Dollar Tree	Family Dollar	99 Cent Only
Rite-Aid						
Walgreens Boots Alliance						
Giant Eagle Pharmacy						

28 Other Commercial Establishments and Institutions

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

29 Beverage Establishments

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

30 HOME CONSUMPTION

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 adult are either overweight or obese.

Food Insecurity. The number of people across the U.S. who suffer from food insecurity is estimated to be 50 million people in 2022 (15% of the 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 consumers 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 about 30% of families manage to eat together regularly.

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 genoplasm 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.

3 SUPPLIERS OF AGRICULTURE-RELATED FARM INPUTS

Vegetable, Grass, Fruit, and Grain Seeds / Nuts

Vegetable Seeds (e.g., Lettuce, Peas, Alfalfa, Soybeans, Sorghum, Corn, Wheat, Barley, Radishes, Turnips, Beans, Sunflowers, Sweet Potatoes, Squash, Okra, Kale, Spinach)	Fertilizer	Fruit Seeds (apples, melon, pears, oranges, tomatoes, berries)	Seed Treatment	Germplasm	Novel Traits
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Selected Producers

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

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)

Fruits (tomatoes, bananas, grapes, apples, berries, citrus, watermelons, oranges, pears, cantaloupe, mangoes, plantains, avocados)

Tree Nuts (almond, walnuts, hazel nuts, pecans, pistachio)

Pulses (beans, peas, legumes, lentils)

Wheat (hard red winter, soft red winter, soft white, hard white, durum; used for bread, cakes, pastry, pasta, cereals, crackers, cookies)

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 which is a worldwide staple. The world's largest wheat producing countries are (in million metric tons):

China (134.3 MMT)	France (36.9 MMT)
India (98.5 MMT)	Australia (31.8 MMT)
Russia (85.9 MMT)	Canada (30 MMT)
U.S. (47.3 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	

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 (Chemical Agents that Kill Microorganisms)

Fertilizer

Selected Producers

Mosaic Company	Corteva Agriscience	ChemChina	FMC	Bayer	BASF
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6 Equipment

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

Representative Manufacturers

AGCO	Mahindra	CNH Industrial
Deere & Co.	Kubota Tractor	
CLAAS	TORO Co.	

14 Oils and Refined Products

Salad Oils

Vegetable Oils (Canola, Palm, Corn, Sunflower, Coconut, Olive)

Protein Meals

Selected Producers

Tyson Foods	Archer-Daniels-Midland	DuPont	Bunge	Carqill	Bayer
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15 Vegetables, Fruits, and Nuts

Diced, Canned Fruit

Pickles

Condiments and Sauces

Canned/Frozen Vegetables

Dried Nuts

Selected Producers

Hormel	Pepsi	J.M. Smucker	Kraft Heinz	General Mills	Campbell's
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16 Carbohydrates: (Bread, Cereal, Pasta)

Oatmeal

Bread

Cereal

Cake

Pasta/Noodles

Seasonings, Grits, Flour, Ingredients

Breadfast Bars

Selected Producers

Hormel	General Mills	Kellogg's	Pepsi
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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., deter microbial spoilage and natural physiological deterioration of the plant cells). Generally, techniques used in food processing include blanching, dehydrating, canning, freezing, fermenting and pickling, and irradiating.

17 Snacks

Potato Chips

Chocolate Bars

Corn/Tortilla Chips

Pretzels

Popcorn

Cookies

Candy and Gum

Selected Producers

Pepsi	Conagra Brands	Kellogg's	Campbell's	Nestlé	Utz Brands	Mondelz Int'l	Hershey's	McKee Foods	General Mills	Pepperidge Farm	Mars
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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% through 2026.

18 Animal Nutrition/Feed

Aquacultural Feed

Cattle Feed

Dairy

Seed Additives

Poultry Feed

Swine Feed

Selected Producers

Carqill	Tyson Foods	Land O' Lakes	Alltech
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Processing food includes the processing and selling of formula feeds and animal health and nutrition products to ranchers and animal farms.

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 an ancient practice of raising livestock and wildlife to provide meat, eggs and dairy products. Ranches are big investment 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).

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 Chickens, Breeder Flocks, Eggs

Selected Producers

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

8 FEED LOTS

Feed Yard Owners

Live Cattle, Live Hogs, Live Chickens, Dairy Cows

Selected Producers

CHS Agricultural Cooperative	Dairies	Cattle Ranches	Meatpackers	Feedlots
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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.

19 MEAT, EGG AND DAIRY PROCESSORS

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	Carqill	Bunge	Sanderson Farms	Hormel Foods	KraftHeinz
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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
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21 FISH AND SHELLFISH PROCESSORS

Seafood

Fish Products (Tuna, Salmon, Herring, Halibut, Tilapia)

Shellfish Products (Lobster, Shrimp, Clams, Scallops, Oysters, Crab)

Selected Producers

Mowi	Skretting	Red Chamber Group	Maruha Nichiro	Nippon Suisan Kaisha	Mitsubishi	Austevit	Donngwon Enterprise	Trident Seafoods	Thai Union
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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.

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).

9 AQUACULTURE INPUT SUPPLIERS AND BREEDERS

Aquaculture Nutrition and Equipment Providers

Aquaculture Feed	Water Filtration	Predator Control	Hatchery Supplies
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Selected Producers

Archer-Daniels-Midland	Conagra Brands	Imperial Tropicals	Louis Dreyfus
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Fish farm suppliers sell feed, feeders, water treatment and filtration systems, heating and cooling systems, hatchery supplies, predator control, tanks, hydroponics equipment, and lighting.

10 SEAFOOD PRODUCERS

Top U.S. Commercial Fishing Ports/Fisheries

Dutch Harbor, Aleutian Islands, and Kodiak Alaska

New Bedford, Massachusetts

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 grown. In 2018, 114 million MMT of fish were harvested—fish (43.5%), shellfish (14.1%), and crustaceans (6%). China, India, Indonesia, Peru, and the U.S. produce the largest volume of fish.

22 WHOLESALE (for Non-Home Consumption Market)

Meats-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&M's, 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).

23 (for Away-From-Home Consumption Market)

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.)	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)
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U.S. Foods	National Food Group	Sysco
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25 To Commercial Airlines

Simple Flying	Gate Gourmet	LSG Sky Chefs	Flying Food Group
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26 WHOLESALE (for Non-Home Consumption Market)

Large National Restaurant Chains

Yum Brands (Taco Bell, Pizza Hut, KFC)	Chipotle Mexican Grill	Shake Shack
Subway	JAB Holding (Panera Bread)	Starbucks
Wendy's	Chik-fil-A	Starbucks
JAB Holding Company (Krispy Kreme)	Inspire Brands (Jimmy John's)	
McDonald's		
Restaurant Brands International (Burger King, Tim Hortons, Popeyes)	Golden Gate Capital (Red Lobster, Bob Evans Restaurant, California Pizza Kitchen)	Darden (Longhorn Steakhouse, Olive Garden)
Roark Capital's Inspire Brands (Arby's, Buffalo Wild Wings, Jimmy John's, Mister Donut, Dunkin' Donut, Sonic Drive-In, Baskin & Robbins)		
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27 ESTABLISHMENTS FOR NON-HOME CONSUMPTION

Quick Service

Walmart (includes Sam's Club)	7-eleven	Quik Trip	Kwik Trip			
Target						
Costco Wholesale						
Drug Stores	CVS Health	Discount Retailers/Dollar Stores	Dollar General	Dollar Tree	Family Dollar	99 Cent Only
Rite-Aid						
Walgreens Boots Alliance						
Giant Eagle Pharmacy						

28 Other Commercial Establishments and Institutions

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

29 Beverage Establishments

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

30 HOME CONSUMPTION

Individuals and Families

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