

IFMA

INTERNATIONAL
FOODSERVICE
MANUFACTURERS
ASSOCIATION

2022 Year in Review



LETTER FROM THE CEO AND CHAIR

IFMA is a 70-year-old organization that is ready to take on the future! We bring together a legacy of industry experience with a hunger for collaboration, innovation, and connection.

2022 saw us begin some brand-enhancing work to improve IFMA's reach and relevance to our members and the entire food-away-from-home industry. The recent pandemic changed the business landscape at a pace not seen before in our lifetimes. What we know for sure is that the food-away-from-home ecosystem is completely interconnected. We're in this together, and together is the way forward to achieve new levels of success.

Of course, 2022 wasn't just about long-range planning. We have a lot of great achievements to celebrate, including:

- **Membership** – We maintain a very high level of retention in our membership, and this year, we elected to focus on recruiting more mid-sized and service-focused companies. We are very happy to report we added 46 new member companies in 2022!
- **Our Live Events** – We were thrilled to return to a full in-person event schedule this year. COEX, our expanded Gold & Silver Plate Weekend, and our Presidents Conference (where we had record attendance!) hosted hundreds of manufacturers, operators, distributors, and others from across our industry ecosystem.
- **Education & Webinars** – IFMA hosted 38 webinars, focusing on go-to-market best practices, industry trends, and much more. We offered our Foodservice Fundamentals course, both digitally and in-person, and customized the course for teams at several companies. A very well-received whitepaper on disruption in foodservice distribution, along with a manufacturers' playbook, was released by our Go-To-Market Planning Program in the fourth quarter.
- **The Foodservice Leadership Councils** – The five operator councils – consisting of 150+ operator individuals – represent the major segments of foodservice: Elementary & Secondary Schools, College & University, Business & Industry, Healthcare, and Restaurants. We have been expanding their role within IFMA this year and plan to continue to integrate them across programs and event planning.

IFMA is stronger than ever because of our members. We pledge to continue our efforts to help them succeed in today's competitive marketplace. As you look through this Year in Review, know that we are proud of our achievements and our long history, but we are even more excited about what we will accomplish next.

We can't wait to see what we can achieve together!



Phil Kafarakis

IFMA President & CEO



Herb Ring

Chair, IFMA Board of Directors
National Foodservice Director,
The Hershey Company



Overview of FOOD-AWAY-FROM-HOME IN 2022: The Industry IFMA Members Serve

There were 1.49M foodservice operations in the United States in 2022. Restaurants and retail made up a majority.

59%
Restaurants

14%
Retail

Other segments include foodservice facilities in:



*IFMA Scope

Overall, the industry represents \$271B in sales.

Many operators saw some growth in 2022, as consumers coming through the pandemic years returned to schools and workplaces and expanded their food-away-from-home purchases. But key economic indicators paint a somewhat fuzzy picture.

Inflation, labor shortages, and overall low consumer confidence has many industry observers justifiably uncertain. IFMA believes that growth in 2023 will be fairly flat.

The industry can remain cautiously optimistic, however. Flat isn't negative, and long-term projections show an eventual easing of inflation and both labor and supply chain challenges. It looks as though next year may end with sunnier prospects for food-away-from-home than it will have at its start.

IFMA MEMBERSHIP

IFMA's membership has traditionally been composed of large, national food manufacturers. Over time, mid-sized and regional manufacturers and companies providing integral services to food-away-from-home have been added to membership. There are currently two categories of IFMA members – manufacturers and associate members (made up of service providers).

2022 was a record-breaking year for us, bringing in 46 new members. Membership is flourishing, both in acquisition and retention, and the diversity of our membership continues to grow. Member benefits across all IFMA programs, events, training, research, etc., produced a value equivalent to \$462,200 for active members.

Our goal is to be a neutral partner, improving communication and collaboration across the industry. We provide ways for our members to engage other segments, and our programs and events bring operators, distributors, and other channel partners together to address the full ecosystem of food-away-from-home.

Serving, leading, and connecting are what IFMA is all about.

NEW 2022 MEMBERS

2022 IFMA EVENTS

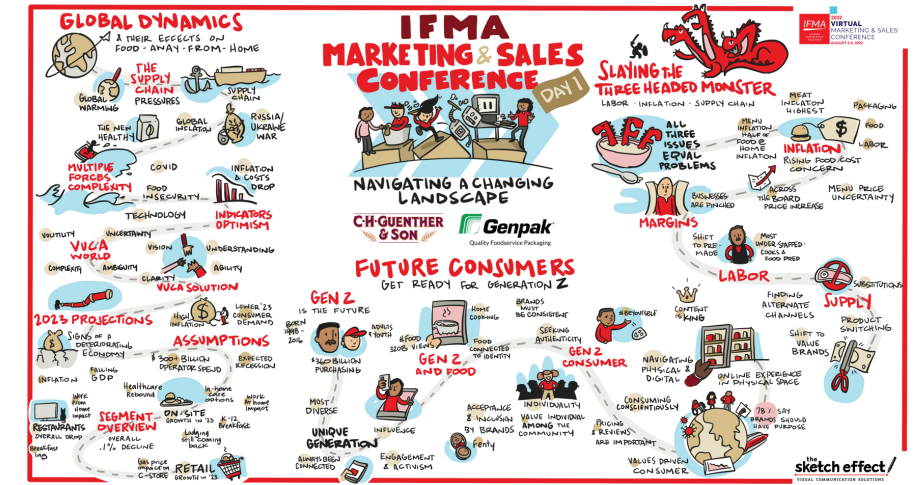


COEX

The 2022 IFMA Chain Operators EXchange (COEX) was our first in-person event since 2019. Held in March in Austin, Texas and centered around the theme “Forging a New Path Forward,” we hosted nearly 500 attendees from across the supply chain. Event highlights included dozens of industry speakers, including leaders from Checker’s & Rally’s, Golden Corral, Big Chicken, and the Texas Restaurant Association. A record number of operators hosted popular speed meeting tables, where IFMA members met with nearly 100 operator companies. One of the conference’s must-do experiences was the inaugural IFMA Menu-a-thon, where the hottest trends impacting menus were reviewed, prepared, and sampled. For those who missed the event, session recordings are available on the IFMA Foodservice Education Center.

MARKETING & SALES VIRTUAL CONFERENCE

We had 900+ foodservice manufacturers, operators, distributors, and supporters at our info-packed Marketing and Sales Conference in August. The virtual event was composed of nearly 30 agenda sessions, where industry leaders shared expertise, outlined challenges, and brought new solutions to light. Throughout the conference, the voice of the operator was highlighted. Bringing together so many marketing and sales foodservice professionals benefits us all.



GOLD & SILVER PLATE AWARDS WEEKEND

The IFMA Gold & Silver Plate Awards is the longest-running and most respected awards program in foodservice. We hosted three days of activities in mid-May, including an Education Forum and industry recognition dinner, and culminating in the 68th annual awards celebration at the Chicago Cultural Center. Eight leaders from across the industry were honored as Silver Plate Recipients. The weekend celebrated 2022 winners, the work of the IFMA Education Foundation, and the revitalized Gold & Silver Plate Society. Among the eight Silver Plate recipients, a jury selected President & CEO of Golden Corral, Lance Trenary, the 2022 Gold Plate Award winner by secret ballot.



PRESIDENTS CONFERENCE

For its 60th year, the top-to-top leaders conference brought a record attendance of food-away-from-home leaders and visionaries together in Scottsdale, Arizona to examine shared industry challenges and hear new ideas to take on the future. With a conference theme centered around “Together We Lead,” the program focused on issues facing the entire food-away-from-ecosystem and hosted speakers who are addressing those challenges. Must-see sessions included a dynamic conversation with Sysco President & CEO, Kevin Hourican, and Sysco VP and Chief Diversity & Culture Officer, Adrienne Trimble, on Sysco’s efforts to create a more diverse, equitable, and inclusive culture. Hands-on experiences with new technologies were provided by exhibitors at our brand new Tech Showcase.



2022 IFMA PROGRAMS & EDUCATION

IFMA Consumer Planning Program

The IFMA Consumer Planning Program (CPP), a group of 26 foodservice manufacturing companies focused on consumer and operator insights, commissioned ten research studies in 2022. Among the researched topics was a study of how operators were coping with historically high inflation, how consumers would alter behavior in a recessionary market, and how the dinner daypart has evolved for both consumers and operators.

Individuals from CPP companies met in Chicago in November to review and discuss the full body of research. The 2022 CPP reports are made available to IFMA members at a discounted rate. The 2023 program is underway and open to all IFMA manufacturer members.



IFMA GO TO MARKET PLANNING PROGRAM

In 2022, the IFMA Go To Market Planning Program (GTM) – a committee comprised of sales leaders across the IFMA membership – focused on anticipated shifts in the way that the away-from-home ecosystem will work in the near and far future.

To address these expected changes, the GTM Planning Program published two deliverables, a white paper entitled, “Distribution Disruption: How Today’s Strategies Will Not Work Tomorrow,” and a playbook that gave foodservice manufacturers a tangible action plan to address the new marketplace. The Planning Committee won a 2022 Sparkplug Award for this work (photo).



IFMA SCOPE

IFMA continues to provide the away-from-home marketplace with reliable forecasts on how the foodservice industry is expected to perform in the current year and in the following year.

Updated twice last year, in February and August, the IFMA Operator Landscape gave projections on growth for every major segment in the foodservice industry. Additionally, the IFMA Consumer Food Journey™ continued to provide its users with research-driven data on how consumers make decisions about where to source their meal from.

IFMA EDUCATION FOUNDATION

The Foundation promotes the next generation of foodservice leaders through scholarships and stipends awarded to outstanding college students planning a career in our industry. As a 501(c)(3) nonprofit organization, the Foundation works directly with schools and ensures 100% of donor contributions go towards funding scholarships and stipends. IFMA provides in-kind services for administration.



In 2023, we plan to expand the role of our Gold & Silver Plate Society members (operators are all past winners of the Gold or Silver Plate Award) to help us with outreach for the IFMA Education Foundation and to create opportunities for mentoring.



IFMA FOODSERVICE FUNDAMENTALS

In 2022, 215 individuals completed the IFMA Foodservice Fundamentals class, an introduction to how the foodservice industry works. For the first time ever, almost half of the completed classes took place in a self-directed, on-demand, online environment through the IFMA Foodservice Education Center.

In addition to the standard Foodservice Fundamentals class, IFMA also delivered customized versions of the class to three IFMA companies at a location of their choosing.

THE FOODSERVICE LEADERSHIP COUNCILS

The five councils are made up of more than 150 foodservice operators, representing major segments in our industry: Elementary & Secondary Schools, College & University, Business & Industry, Healthcare, and Restaurants. Last year, we expanded their role within IFMA and have further integrated the councils into IFMA programs and events.



The FLCs created a framework for the future – Vision 2025 – early in the year that outlines the key priorities that each segment and the industry will be facing over the next three to five years. This was shared out at the IFMA Presidents Conference in November and will fuel a broader body of work going forward. In July, several FLC members took part in an IFMA long-range planning meeting with our board of directors. FLC leaders also joined the IFMA Board of Directors for a portion of its meeting in November.

An important element of our upcoming strategic plan will be expanded integration between the FLCs and IFMA.

LOOKING AHEAD

IFMA's next iteration of an organizational strategic plan will launch in 2023. We anticipate this plan will be approved by our board by mid-year and outline goals through 2026.

Building out an engaged and committed membership base has been and will remain a foundational pillar of our association. We will be working to increase our member value and our reach over the next few years.

Leveraging our expertise in connecting and educating our community through events, insights, best-practices, and training and development will also remain at the center of our efforts. IFMA is dedicated to being the place where the

industry can come together to collaborate and brainstorm new ways to address common challenges. It is also time for IFMA to direct internal efforts toward increasing our brand awareness and clearly establishing our leadership position in the larger food-away-from-home ecosystem. We anticipate the last half of the year will see us working on a new branding initiative to support those efforts. Stay tuned for a Q4 launch.

**2022 was a great year for us.
We anticipate that 2023
will be even better.**



The 2022 IFMA BOARD OF DIRECTORS

We thank these individuals for their commitment and service to our association in 2022.

EXECUTIVE COMMITTEE:

- **Chair:** Herb Ring, National Foodservice Director at The Hershey Company
- **First Vice-Chair and Diversity, Equity & Inclusion Co-Chair:** Jamie McKeon, Senior Vice President, Demand Creation at Rich Products Corporation
- **Vice-Chair:** Ben Wexler, President at Custom Culinary
- **Vice-Chair:** Teri Trullinger, Vice President Sales at Cargill Foodservice
- **Diversity, Equity & Inclusion Co-Chair:** Paul Edmondson, Commercial Director at P&G Professional Americas
- **Membership Chair:** David Rizley, Vice President of Strategic Accounts at Essity Professional Hygiene
- **Education Foundation Chair:** Alec Frisch, VP & General Manager Foodservice at Georgia-Pacific
- **At-Large:** Nanette Lunningham, VP Foodservice Marketing & Channel Development, Tyson Foods, Inc.
- **At-Large:** Oliver Kelly, President & Chief Executive Officer, North America at Kerry
- **2021 Chair:** Hugh Roth, Senior Vice President - Chief Customer & Business Development Officer at PepsiCo Global Foodservice
- **2020 Chair:** Perry Miele, President at Nestlé Professional North America

2022 BOARD DIRECTORS:

- Luis Andrade, Senior Vice President of Foodservice at Ventura Foods
- Tom Bell, Vice President, General Manager, Prepared Foods at Wayne Farms
- Eric Blumenthal, Vice President at The Coca-Cola Company
- Erin Buntin, Director of Foodservice Sales at Schreiber Foods
- Pam Cervenka, Senior Director, Foodservice Division at Chicken of the Sea
- Greg Cocchiarella, Vice President, Industry Relations at Ecolab
- Kelly Crouse, Senior Vice President & Chief Commercial Officer at C.H. Guenther
- Joe Cusick, Vice President of Sales at Olam Food Ingredients
- Christos Dinopoulos, Vice President & Managing Director North America at Unilever
- Rosalyn Emerson, Senior Director of Channel Marketing at Chobani
- Mary Flinn, National Manager Non-Commercial Sales at Tofurky – Turtle Island Foods
- Mary Klakulak-Sclafani, Vice President Market Innovation Strategy at Genpak
- Joe Kunde, Vice President Indirect & Corporate Distribution at McCain Foods USA
- Art Michaels, Vice President Foodservice at Smithfield Foods
- Kory Mickelson, Senior Vice President, Chief Commercial Officer at CraftMark Bakery
- Mark Ourada, Group Vice President Foodservice at Hormel Foods
- Peter Parthenis, CEO at Grecian Delight at Kronos Foods
- Ashley Peebles, Senior Vice President Foodservice at Royal Cup Coffee
- Bob Pierce, Senior Vice President North America at Bunn-O-Matic Corporation
- Barbara Powell, Vice President Foodservice at Mount Franklin Foods dba Azar Nut Company
- Zachary Ramos, Vice President & General Manager Foodservice at Kellogg Company
- Ian Roberts, Vice President & General Manager at Conagra
- Tom Rupkey, Vice President North America Sales at High Liner Foods
- Tom Ruszkowski, Executive Vice President Foodservice at Red Diamond
- Mark Schremp, Vice President Food Service Channel at Saputo Dairy
- Tim Wayne, General Manager and VP, Away-From-Home at The J.M. Smucker Company



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