To Download the 2018 Midwinter Executive Conference Mobile App
Follow these Easy Steps:

1. In your App Store on your mobile device, search for FMI Events.

2. Find and install this app.

3. Once installed, choose the 2018 Midwinter Executive Conference.

4. You may be asked if you would like to receive push notifications and to set up a password.

www.fmi.org/midwinter
Welcome to FMI Midwinter!

We are very glad you have joined us in Miami for what will be a dynamic time to discuss and share insights on the rapid and sweeping changes in the food retail industry. Midwinter is the place where industry executives, trading partners and service providers all get together to celebrate the noble calling of food retailing. I appreciate FMI for its vital role in bringing together industry experts and thought leaders to help us harness these changes to support our bottom lines. I hope you dive into as many of the discussions, networking opportunities and education sessions as your schedule allows.

We will kick off the Midwinter experience with a Flashback Friday opening night event in the Grand Ballroom hosted by PepsiCo, Inc. in conjunction with Anheuser-Busch, E.&J. Gallo Winery, IRI, MarsWrigley Confectionery and Oracle Data Cloud. You’ll enjoy hot eats, cool cocktails and music from The Midtown Men as we relive the decades with tunes from Buddy Holly to the Beatles, from the Bee Gees to Bon Jovi. Join us for a trip down memory lane as we value the past and embrace the future.

As we all know, strong trading partner relationships are important and vital as business models shift. As you invest time in your private trading partner meetings in the Strategic Executive Exchange (SEE), I hope you appreciate those relationships and the value they bring during these changing times.

As the industry’s leaders, we must stay ahead of the curve when it comes to constantly evolving consumer demands and swift shifts in technology. At Midwinter, you’ll take away new ideas, new partnerships and new information.

Please also take advantage of the Midwinter mobile app provided by Label Insights. The app allows you to access the agenda, education sessions, speaker details and handouts. For more details on how to download the app, please take a look at the preceding page.

Best,

Mark Skogen
President and CEO
Festival Foods
Chairman
FMI Midwinter 2018

An Appetite for Change
Leveraging digital and satisfying consumers’ hunger for more
### Agenda at a Glance

#### FRIDAY, JANUARY 26, 2018
- **7:30 a.m. – 4:00 p.m.** Refresh Lounge
- **7:30 a.m. – 7:00 p.m.** Registration
- **12:00 p.m. – 2:00 p.m.** Independent Operator Executive Leadership Forum
- **12:00 p.m. – 4:45 p.m.** Strategic Executive Exchanges
- **1:30 p.m. – 3:15 p.m.** Education Sessions
- **5:30 p.m. – 6:30 p.m.** Midwinter First-timers Welcome Reception
- **6:30 p.m. – 9:30 p.m.** PepsiCo Presents: Flashback Friday at FMI Midwinter

#### SATURDAY, JANUARY 27, 2018
- **7:00 a.m. – 7:30 a.m.** Midwinter Breakfast
- **7:30 a.m. – 12:00 p.m.** Education Sessions
- **10:00 a.m. – 3:45 p.m.** Strategic Executive Exchanges
- **1:30 p.m. – 3:30 p.m.** Education Sessions
- **4:00 p.m. – 6:00 p.m.** Keynote Sessions:
  - FMI Midwinter Chairman’s Remarks: Leveraging Digital and Delivering on Traditional: Satisfying Consumers’ Hunger for More
  - Shaping the Future of Food Retail: Lessons from the U.K.
  - Rapid Lightning Round: FMI Research on Loyalty, Digitally Engaged Food Shopper and Trading Partner Priorities
- **6:00 p.m. – 7:00 p.m.** Midwinter Reception

#### SUNDAY, JANUARY 28, 2018
- **6:15 a.m. – 8:00 a.m.** Sunrise 5K Fun, Run/Walk (Registration 6:15 a.m., Start 6:45 a.m.)
- **7:30 a.m. – 5:00 p.m.** Refresh Lounge
- **7:30 a.m. – 7:00 p.m.** Registration
- **8:00 a.m. – 12:45 p.m.** Strategic Executive Exchanges
- **9:30 a.m. – 10:30 a.m.** Yoga
- **11:00 a.m. – 5:00 p.m.** FMI Food Industry Golf Tournament
- **12:00 p.m. – 2:00 p.m.** Spouse + Guest Luncheon
- **1:30 p.m. – 3:30 p.m.** Executive Roundtables
- **6:30 p.m. – 9:30 p.m.** FMI Foundation Presents: Stir It Up!

#### MONDAY, JANUARY 29, 2018
- **7:00 a.m. – 8:00 a.m.** Midwinter Breakfast
- **7:00 a.m. – 10:30 a.m.** Registration
- **8:00 a.m. – 10:30 a.m.** Keynote Sessions:
  - FMI Annual Meeting: Stop! Look Both Ways before Crossing Into 2018
  - The Battle for the Food Marketplace: A View from Silicon Valley
  - FMI Executive Leadership Awards: Esther Peterson, Glen P. Woodard Jr. and Herbert Hoover
  - Getting Your Bearings in a Rapidly Moving Industry: State of the Food Retail Industry
- **10:45 a.m. – 5:30 p.m.** Strategic Executive Exchanges

### Provident Shuttle Service

#### THURSDAY
- **7:15 a.m. – 8:15 a.m.** Provident Lobby
- **5:00 p.m. – 6:00 p.m.** Doral Drive

#### FRIDAY
- **7:30 a.m. – 8:30 a.m.** Provident Lobby
- **9:30 p.m. – 10:30 p.m.** Doral Drive

#### SATURDAY
- **6:30 a.m. – 7:30 a.m.** Provident Lobby
- **6:30 p.m. – 7:30 p.m.** Doral Drive

#### SUNDAY
- **7:30 a.m. – 5:00 p.m.** Provident Lobby
- **5:00 p.m. – 6:00 p.m.** Doral Drive

#### MONDAY
- **6:30 a.m. – 7:30 a.m.** Provident Lobby
FRIDAY, JANUARY 26, 2018

7:30 a.m. – 4:00 p.m.  Refresh Lounge
Living Room Lounge and Veranda
Hosted by our Partners at Anheuser-Busch, Chobani, Conagra Brands, E.&J. Gallo Winery, Keurig Green Mountain, Inc.,
Stop by the Midwinter Refresh Lounge to relax and re-energize between meetings and conference events with complimentary coffee, snacks, and beverages, provided by our host lounge partners.

7:30 a.m. – 7:00 p.m.  Registration
Living Room Lobby (7:30 a.m. - 5:30 p.m.)
Grand Ballroom Foyer (5:45 p.m. - 7:00 p.m.)
Sponsored by The Coca-Cola Company, The Hershey Company, BMO Financial Group, Burris Logistics, Quotient Technology

12:00 p.m. – 2:00 p.m.  Independent Operator Executive Leadership Forum
Emerging Digital Realities and Opportunities for Independent Operators
Ivanka A
Digital, ecommerce, omnichannel...food retailers have been talking about these topics for several years now, exploring options, investing in technologies and restructuring processes. As independent operators, the struggle can be to identify the right strategy and investment to take advantage of the digital wave. Learn about some of the latest digital innovations and practical paths for building digital platforms that play to the unique strengths of local, community-based retailers.
Jon Ambrose, Co-founder and COO, Rosie
Merijn Helle, Vice President, Head of Industry & Value Advisory, East Market Unit & Retail, SAP America
Mark Skogen, President and CEO, Festival Foods & Chairman, FMI Midwinter 2018

12:00 p.m. – 4:45 p.m.  Strategic Executive Exchanges
Spa Suites & Bobby Jones

1:30 p.m. – 2:15 p.m.  The Evolution of Eating – A Generational Study
White & Gold Ballroom D
Digital disruption, new economic realities, and the latest fads all contribute to changing food and beverage consumption behaviors. But what if the behavioral changes we can observe are more deeply rooted than current circumstances? Is it possible that some observed generational differences can transcend the moment and effect change for decades? NPD has leveraged a wealth of historical food consumption data and advanced analytical methods to forecast the effects of generational change on a wide variety of food trends and identify trends of the future.
David Portalatin, Vice President, Food Industry Advisor, The NPD Group

2:15 p.m. – 2:30 p.m.  Break
Sponsored by Post Consumer Brands, DanoneWave, RefrigiWear, Inc., Keurig Green Mountain, Inc.

2:30 p.m. – 3:15 p.m.  Top Trends in Fresh: The Consumer’s Perspective
White & Gold Ballroom D
Hungry for more insights into top trends in Fresh? Think you really know what your customers want? Join us as we look at what consumers really see as the trends in food retailing. Through data and video intercepts with actual shoppers, we examine consumer tastes from three basic perspectives: generational, ethnicity and income.
Larry Levin, Executive Vice President, IRI Thought Leadership, IRI
Sally Lyons Wyatt, Executive Vice President, and Practice Leader, IRI

3:15 p.m. – 3:30 p.m.  Break
Sponsored by Post Consumer Brands, DanoneWave, RefrigiWear, Inc., Keurig Green Mountain, Inc.

5:30 p.m. – 6:30 p.m.  Midwinter First-timers Welcome Reception
Living Room Lounge and Veranda
Sponsored by Anheuser-Busch, E.&J. Gallo Winery
Mingle with FMI staff and veteran attendees to answer your questions and provide tips about how to most effectively use your time at Midwinter.

www.fmi.org/midwinter
FRIDAY, JANUARY 26, 2018

6:30 p.m. – 9:30 p.m.  PepsiCo Presents: Flashback Friday at FMI Midwinter
Grand Ballroom

Sponsored by PepsiCo, Inc., Anheuser-Busch, E.&J. Gallo Winery, IRI, Mars Wrigley Confectionery, Oracle Data Cloud

In the midst of evolving food retailing, music from past decades can remind us of our history and changes in consumer behaviors and preferences. Join in as we go down memory lane with tunes from Buddy Holly to The Beatles, from the Bee Gees to Bon Jovi, and more. Featuring hot eats, cool cocktails, and a live performance by The Midtown Men, stars from the original Broadway cast of Jersey Boys. Midwinter is a great time to place the changes in perspective, reconnect, and, of course, party! What better way than connecting the decades through the songs of the decades?

All attendees welcome. This is a party you will not want to miss!

www.fmi.org/midwinter
7:00 a.m. – 4:00 p.m. Refresh Lounge
Living Room Lounge and Veranda
Stop by the Midwinter Refresh Lounge to relax and re-energize between meetings and conference events with complimentary coffee, snacks, and beverages, provided by our host lounge partners.

7:00 a.m. – 6:00 p.m. Registration
Living Room Lobby (7:00 a.m. - 3:15 p.m.)
Grand Ballroom Foyer (3:30 p.m. - 6:00 p.m.)
Sponsored by The Coca-Cola Company, The Hershey Company, BMO Financial Group, Burris Logistics, Quotient Technology

7:30 a.m. – 9:00 a.m. Midwinter Breakfast
Crystal Ballroom
Sponsored by Catalina

9:00 a.m. – 9:45 a.m. Education Sessions
The Evolution of Eating – A Generational Study
Majestic Ballroom
Digital disruption, new economic realities, and the latest fads all contribute to changing food and beverage consumption behaviors. But what if the behavioral changes we can observe are more deeply rooted than current circumstances? Is it possible that some observed generational differences can transcend the moment and effect change for decades? NPD has leveraged a wealth of historical food consumption data and advanced analytical methods to forecast the effects of generational change on a wide variety of food trends and identify trends of the future.
David Portalatin, Vice President, Food Industry Advisor, The NPD Group

Making Retail Smarter via Automation and Machine Learning
White & Gold Ballroom D
Presented by the Trading Partner Alliance
Sponsored by SwiftIQ
What makes a highly competitive online retailer? They unify granular data, enable APIs and embrace automation and artificial intelligence from supply chain to store to customer to gain operational efficiencies and deliver compelling, personalized shopping experiences. In this session, we will discuss new foundations of retail technology and measurement that facilitate lower costs and seamless execution using collaborative insights derived from combining all stakeholders: retail, suppliers and distributors. Finally, we will share some examples of how retailers and suppliers are leveraging automation and machine learning applications to improve core retail fundamentals such as promotion, pricing, merchandising and distribution.

9:45 a.m. – 10:00 a.m. Break
Sponsored by Post Consumer Brands, DanoneWave, RefrigiWear, Inc., Keurig Green Mountain, Inc.

10:00 a.m. – 10:45 a.m. Education Sessions
Talent Development – Network of Executive Women (NEW) Insights and Solutions to Create Competitive Advantage
Majestic Ballroom
The Network of Executive Women, in partnership with Accenture, has developed insights and workplace solutions on how to win and keep talent in today’s workforce. Learn about solutions to foster engagement, inclusion and advancement across all generations. Unlock the power of women’s leadership to create a workplace where everyone thrives.
Sarah Alter, President & CEO, The Network of Executive Women
Carole Christianson, Chief Operating Officer, Western Association of Food Chains
Subarna Malakar, Vice President, Global Diversity & Inclusion, Ahold Delhaize
Beth Marrion, Managing Director, Retail, Accenture
SATURDAY, JANUARY 27, 2018

10:00 a.m. – 3:45 p.m.  Strategic Executive Exchanges
                        Spa Suites & Bobby Jones

10:45 a.m. – 11:15 a.m.  Break
                        Sponsored by Post Consumer Brands, DanoneWave, RefrigiWear, Inc., Keurig Green Mountain, Inc.

11:15 a.m. – 12:00 p.m.  Education Sessions
                        Top Trends in Fresh: The Consumer’s Perspective
                        Majestic Ballroom
                        Hungry for more insights into top trends in Fresh? Think you really know what your customers want? Join us as
                        we look at what consumers really see as the trends in food retailing. Through data and video intercepts with
                        actual shoppers, we examine consumer tastes from three basic perspectives: generational, ethnicity and income.
                        Larry Levin, Executive Vice President, IRI Thought Leadership, IRI
                        Sally Lyons Wyatt, Executive Vice President, and Practice Leader, IRI

                        How to Achieve Breakout Growth in CPG Today
                        White & Gold Ballroom D
                        Presented by the Trading Partner Alliance
                        Sponsored by The Boston Consulting Group and IRI
                        In this session, you’ll receive an exclusive first look at the winners of BCG and IRI’s annual analysis of over 400
                        CPG companies to find out who achieved stand-out growth in 2017. Draw practical inspiration directly from a
                        panel of winners about how to reimagine your business and your consumer to excel in today’s unprecedented
                        retail environment.
                        Dr. Krishnakumar (KK) Davey, President, Strategic Analytics, IRI
                        Peri Edelstein, Partner & Managing Director, The Boston Consulting Group

1:30 p.m. – 2:15 p.m.  Education Sessions
                        Collaboration in the Digital World: Practitioners Who Are Disrupting the Model
                        Majestic Ballroom
                        Without question, digital retailing has come of age. In 2016, FMI and Nielsen assessed the impact of digital
                        technology in the grocery channel. The research showed that by 2025 consumer spending on online grocery
                        could reach $100 billion, impacting categories that represent 40 percent of current center store grocery sales.
                        In fact, the industry is experiencing a pace of change likely to exceed that prediction. Where are the earliest wins
                        in digital collaboration coming from? Who’s finding success in food retailing with digital tools and why?
                        In this session, we’ll explore six key areas where you can reduce costs and improve processes:
                        1.  Master Data
                        2.  Shopper Insights
                        3.  Forecasting
                        4.  Marketing and Promotions
                        5.  Digital Shelf
                        6.  Organizational Structure
                        Thom Blischok, Chairman and CEO, The Dialogic Group, LLC
                        Laurie Rains, Vice President, Retail Commercial Strategy, Nielsen
Generation Z: Shopper of Today and Tomorrow
White & Gold Ballroom D
Presented by the Trading Partners Alliance
Sponsored by IRI

Poised to become our most important generation of shoppers yet, the highly discerning and constantly changing Generation Z today represents a shopper population base equal to that of millennials. Yet they are different than their older cousins in important ways. They are the first generation of the “minority-majority” and they grew up completely digital. Join the founders of The Family Room to learn what really matters to this burgeoning segment of our global population and how they just might fuel new growth opportunities.

George Carey, Founder and CEO, The Family Room LLC
Robert Tomei, President, Consumer and Shopper Marketing, Core Content and Insight Services, IRI and Founder of The Family Room LLC

2:15 p.m. – 2:45 p.m. Break
Sponsored by Post Consumer Brands, DanoneWave, RefrigiWear, Inc., Keurig Green Mountain, Inc.

2:45 p.m. – 3:30 p.m. Education Session
The Power of GM and HBC
Majestic Ballroom
Did you know that the largest revenue opportunities for grocers are right under your nose within the General Merchandise and the Health & Beauty Care departments? In this fast-paced session, we will:

• Examine the winds of change in the industry: e-commerce, health and wellness, and the demographic shifts that are creating new opportunities in your stores.
• Highlight the best practices shared by retailers who are top performers in GM and HBC.
• Bring those best practices to life with case studies of chains that are experiencing substantial growth with GM and/or HBC.

Moderator:
John Clevenger, Managing Director, Senior Vice President, Acosta
Panelists:
Patrick Cady, Vice President, The Procter & Gamble Distributing Company
Lisa Paley, Chief Customer Officer, Pfizer Consumer Healthcare
Ashley Taylor, Chief Customer Officer, Acosta

4:00 p.m. – 6:00 p.m. Keynote Sessions
Grand Ballroom
FMI Midwinter Chairman’s Remarks: Leveraging Digital and Delivering on Traditional: Satisfying Consumers’ Hunger for More
During over seventy years in the food retail business, the Skogen family has had a front-row seat to tremendous change: from meat and potatoes to quinoa and chia, from cash registers to ecommerce, and from strolling an aisle to scrolling a screen. Through the waves of change they have sailed steadily ahead on a boomerang principle where every business decision is based on the question: “Will it bring the customer back?” Festival Foods CEO and Midwinter Chairman Mark Skogen opens Midwinter 2018 with a view on how his Wisconsin company has maintained its appetite for change.

Mark Skogen, President and CEO, Festival Foods

Shaping the Future of Food Retail: Lessons from the U.K.
While the impact of ecommerce on food retailing is still being debated in the U.S., our friends in the U.K. have been grappling with new forms of food retail for years. What can we learn from them? The U.K.-based Ocado Group is the world’s largest pure-play online grocery retailer. For them it has been investment in technology and automation that allows them to put together a 50-item order in a matter of minutes, provide a compelling proposition to their customers and build a profitable business. In this session, hear from Ocado Founder and CEO, Tim Steiner, about Ocado’s proprietary technology and automation capabilities, how they operate in the U.K., and where they see opportunities and challenges that could prove to be snapshots of our own future.

Tim Steiner, Chief Executive Officer, Ocado
FMI Executive Leadership Awards

Rapid Lightning Round: FMI Research on Loyalty, Digitally Engaged Food Shopper and Trading Partner Priorities
How are the forces of change in consumer attitudes and digital changing the way food retailers and their partners are doing or will be doing business? FMI and our partners are seeking answers through several research projects that seek to measure and describe these changes and their impacts. This session will share top findings of key research projects in loyalty, digital and trading partner priorities.
Moderator: Scott Moses, Managing Director, Head - Food Retail & Restaurants Investment Banking, PJ Solomon Company
Marc Hubbard, Vice President Client Service (U.S. Country Manager), Advantage Group (TM) U.S.A.
Graeme McVie, Chief Business Development Officer, Precima
Chris Morley, President U.S., Nielsen

6:00 p.m. – 7:00 p.m. Midwinter Reception
North Foyer and Grand Patio
Sponsored by Label Insight, Anheuser-Busch, E.&J. Gallo Winery
Join us for the Midwinter Reception immediately following the Saturday keynote sessions. Come enjoy food and drinks while you mingle and network with your peers in a fun and relaxed environment. This is a great opportunity to connect with other attendees, expand your network of resources and develop true working relationships. We look forward to seeing you there!
6:15 a.m. – 8:00 a.m. FMI Midwinter Sunrise Run/Walk
Start Location: Tennis Courts
Sponsored by Catalina, Mondelez International, The Clorox Company
6:15 a.m. – Registration & Warm Up
6:45 a.m. – Run/Walk Start
Join your colleagues and friends for the 2nd Annual FMI Midwinter Sunrise Run/Walk! It’s a great way to kick off your conference day. Runners and walkers of all speeds are invited to participate. Registration is open to all FMI Midwinter conference attendees and guests. All participants will receive a race number and commemorative race t-shirt. Music and morning refreshments will be provided. Registration is complimentary for all runners and walkers, thanks to support from event sponsors Catalina, Mondelez International, and The Clorox Company. Don’t delay register today!

7:30 a.m. – 5:00 p.m. Refresh Lounge
Living Room Lounge and Veranda
Stop by the Midwinter Refresh Lounge to relax and re-energize between meetings and conference events with complimentary coffee, snacks, and beverages, provided by our host lounge partners.

7:30 a.m. – 7:00 p.m. Registration
Living Room Lobby
Sponsored by The Coca-Cola Company, The Hershey Company, BMO Financial Group, Burris Logistics, Quotient Technology

8:00 a.m. – 12:45 p.m. Strategic Executive Exchanges
Spa Suites & Bobby Jones

9:30 a.m. – 10:30 a.m. Yoga
National Doral Spa
Sponsored by General Mills, Inc.
Join fellow attendees for a 60-minute guided yoga class. “Awakening Yoga” is a dynamic, physically energizing form of yoga that will stretch your limbs and awaken your senses with the guidance of your own heart beat getting in tune with the rhythm of the day. Suitable for all levels. Open to all attendees. Space is limited, please visit the FMI registration desk for availability.
11:00 a.m. – 5:00 p.m.  
**FMI Food Industry Golf Tournament**  
Imperial Ballroom Patio  
*Title Sponsors: MillerCoors, Nestlé U.S.A., TCC Global*  
Join your colleagues for a great day of golf on the legendary Blue Monster Course. A luncheon, generously sponsored by Precima, begins at 11:00 a.m. with a shotgun start at 12:30 p.m. Players are welcome to take advantage of the driving range and putting green. For more information, contact Julie Schrei, jschrei@fmi.org.

12:00 p.m. – 2:00 p.m.  
**Spouse + Guest Luncheon**  
Crystal Ballroom and Patio  
*Sponsored by Accenture, Campbell Soup Company, Hallmark Cards, Inc., Mondelēz International*  
Spouses and guests are invited to enjoy a gourmet lunch designed by Chef Richard of Campbell Soup Company. After lunch, Sheila Mains, Founder of Brownie Brittle, will share her story of resilience and hard work. Once on the unemployment line, Sheila used her drive and energy to focus on realizing her dream of starting her own company in what she knows best...baking!  
To RSVP for this event, please contact Gladys Swearingen at gswearingen@fmi.org.
1:30 p.m. – 2:15 p.m. Executive Roundtables
Next-Generation Loyalty: Get It Right in Food Retailing
White & Gold Ballroom B
Loyalty means different things to different generations. Today’s consumers define loyalty differently than those of just a few years ago. In this session, you and your colleagues will learn about and discuss:
• An assessment of the loyalty landscape in the food industry,
• The best practices of adjacent industries in earning consumer loyalty,
• The shopper’s perspective on loyalty in the food industry,
• A maturation model that you can adopt to pursue next-generation loyalty,
• A way to use data to quantify the value of implementing next-generation loyalty and customer-centric retailing, and
• Specific steps that a retailer can take today to achieve next-generation loyalty.
Graeme McVie, Chief Business Development Officer, Precima

Planning for the Consumer of 2030
White & Gold Ballroom C
The companies that identify today how we could live and consume tomorrow, and use those insights to drive business transformation, will be the ones that create profitable growth. In this interactive, discussion-based session, learn early insights from a worldwide research effort into trends that will shape the consumer of 2030. Take part in discussions shaping these insights into possible real futures that will impact:
• Ways to stay relevant and add value for your consumers,
• Options on how you evolve your ecosystem, operating model, talent and capabilities to be future-fit, and
• The degrees of agility and velocity necessary to keep your company in step with future consumers.
Thomas E. Bornemann, Principal, Consumer Products and Retail Consulting, Ernst & Young U.S. LLP
Andrew Cosgrove, Global Lead Analyst for Consumer Products and Retail, Ernst & Young LLP

2:45 p.m. – 3:30 p.m. Executive Roundtables
Leading Disruption in Consumer Industries: Applications of Artificial Intelligence (Ai)
White & Gold Ballroom B
Forward-thinking retailers and manufacturers are applying Ai to drive new growth through improved merchandising, marketing, supply chain, ecommerce, loyalty and more. In this session r4 Technologies, a leading enterprise Ai platform, will share practical information for food retailers and manufacturers about:
• What is Ai?
• Where is adoption happening today?
• Case studies driving impact.
• How to get started.
David Bradley, Executive Vice President, Solution Management, r4 Technologies

Facing Change Together: Trading Partner Collaboration Priorities
White & Gold Ballroom C
What does collaboration really look like in food retail today and what are trading partners’ priorities? New research from FMI and Advantage Group International sheds light on ways retailers and their supplier partners can win together in an era of change. In this discussion-based session, you’ll have a chance to hear research results and discuss how these relate to your own businesses on such topics as:
• Why retailers and manufacturers believe collaboration is important to their businesses,
• What both sides believe their partners can do to foster collaboration, and
• What’s keeping partners up at night and how collaboration can help resolve the issues.
Marc Hubbard, VP Client Service (U.S. Country Manager), Advantage Report (TM) U.S.A.
SUNDAY, JANUARY 28, 2018

6:30 p.m. - 9:30 p.m.  FMI Foundation Presents: Stir It Up!
Grand Ballroom

We look forward to seeing you at this no-suit, no-tie, FMI Foundation fundraising event, where food industry leaders Stir It Up!—preparing, sharing and daring to make the best family meal. In this friendly cooking competition, our own FMI Foundation supporters design and serve tasting menus from demo kitchen stations that will be set up for casual dining and your entertainment. Each demo kitchen station will compete to win awards honoring family meals, with nods for cooking the Healthiest, Easiest, Tastiest and Most Affordable meals, and Best Culinary Adventure.

Executive Chef Level Sponsors

Master Chef Level Sponsors

Sous Chef / Sommelier Level Sponsors

www.fmi.org/midwinter
MONDAY, JANUARY 29, 2018

7:00 a.m. – 8:00 a.m. Midwinter Breakfast
Grand Ballroom
Sponsored by Post Consumer Brands, DanoneWave

7:00 a.m. – 10:30 a.m. Registration
Grand Ballroom Foyer
Sponsored by The Coca-Cola Company, The Hershey Company, BMO Financial Group, Burris Logistics, Quotient Technology

8:00 a.m. – 10:30 a.m. Keynote Sessions
Grand Ballroom
FMI Annual Meeting: Stop! Look Both Ways before Crossing Into 2018
Kevin Davis, FMI Chairman of the Board and Chief Executive Officer of Bristol Farms, Inc., will highlight the critical ways FMI worked in 2017 to channel industry disruptions into industry eruptions of innovation and opportunity. In his straight-shooting way, Davis will recap 2017’s challenges and victories, while keeping his eye on possible implications for the year ahead. As part of the Annual Meeting of the FMI members, he will introduce the new FMI Board officers and members who will provide industry insight and leadership as FMI determines the shape, reach and tone of its work as the Voice of Food Retail in 2018.

The Battle for the Food Marketplace: A View from Silicon Valley
The battle for the food marketplace has begun, and we expect the market to look nothing like it does today in just a few years. New models bring a level of convenience consumers have not yet seen, from direct-to-consumer models to front-door convenience. Changes in consumer desires are coming fast. Finally, the food production system is likely to be upended and look very different in the future, lessening waste and expanding our food base. We’ll examine the shakeup currently taking place and explore the technology innovations that will impact the industry.

Presenter: Steve Pinder, Managing Director, Kurt Salmon, part of Accenture Strategy
Moderator: Mark Baum, Chief Collaboration Officer & Senior Vice President, Industry Relations, Food Marketing Institute
Panelists:
Ron Bodkin, Technical Director, Applied Artificial Intelligence, Google
Andrew Ive, Managing Director, Food-X
Steve Pinder, Managing Director, Kurt Salmon, part of Accenture Strategy
Kate Sayre, Global Head of Consumer Goods Strategy, Facebook

FMI Executive Leadership Awards
Join in celebrating the 2018 recipients of the Esther Peterson, Glen P. Woodard Jr. and Herbert Hoover awards.

Getting Your Bearings in a Rapidly Moving Industry: State of the Food Retail Industry
Every significant journey must have its critical moments for assessing progress – times when the travelers must ensure they are on the right track by taking stock of where they are in relation to the starting point and hoped for destination. FMI President and CEO Leslie G. Sarasin will offer her annual assessment of where the food retail industry currently stands in light of its rich and noble heritage and the challenging, but bright, promise of its future. She will then check the soundness of her longitudinal and latitudinal readings of the industry, by engaging in a panel conversation with industry leaders drawn from the diverse spectrum of FMI membership.

Presenter: Leslie G. Sarasin, President and CEO, Food Marketing Institute
Panelists:
Chris Coborn, President and CEO, Coborn’s, Inc.
Kevin Holt, CEO, Ahold Delhaize U.S.A.
Judy Spires, Chairman and CEO, KB U.S. Holdings, Inc.

10:45 a.m. – 5:30 p.m. Strategic Executive Exchanges
Spa Suites & Bobby Jones
200 Fresh-Prepared Subs = $1,000,000 LOSS

(and it’s NOT covered by your insurance)

Traditional insurance policies do not properly cover product recall and contamination—**and the financial risk is massive**. The cost goes far beyond damages owed a person who is sick or injured. How will you recover lost revenue from business interruption, brand damage, and lost clients? When a recall event occurs, companies may lose 1/3 of their business. With RevenueShield®, you don’t need to be one of them.

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www.fmi.org/midwinter 15
Strategic Executive Exchange: Collaborative Meetings Key to Your Success

MEET ONE-ON-ONE WITH C-LEVEL EXECUTIVES.

The Strategic Executive Exchange (SEE) program provides a venue for decision-makers at top food retail and wholesale companies to meet face-to-face with their C-level peers in the supplier and manufacturing communities.

Before you even arrive at the conference, you can arrange one-on-one appointments with executives you want to meet at times that are flexible enough to fit your business conference schedule.

BENEFITS FOR RETAILERS:

• Hold private, in-depth discussions with a wide variety of industry leaders who can help you develop new strategies for your business.

• Build or strengthen relationships with existing or potential business partners.

• Leverage key market forces and consumer trends to increase your revenue and profit.

BENEFITS FOR SUPPLIERS:

• The ability to hear strategic needs of existing and potential customers directly and to explore how your company can help solve their problems.

• The chance to make or grow connections with top executives who have the authority to make buying decisions.

• Ample time to share important information about your company, its products and your insights into the future of the industry.

HOW IT WORKS:

• Since the meetings are intended to be strategic in nature, with tactical issues best served in a different setting, participating supplier/manufacturers and retailer/wholesalers are expected to be senior-level executives, preferably CEOs and COOs whenever possible.

• Over the course of the four-day conference, there will be time for you to arrange meetings of 45 minutes each.

• FMI will facilitate the scheduling process, but cannot guarantee confirmed appointments. However, each company is responsible for securing its appointments and setting an agenda for each meeting.

• Manufacturers, suppliers and service providers will host the meetings in pre-assigned private meeting rooms at the National Doral Miami in Miami, Florida.

STRATEGIC EXECUTIVE EXCHANGE SCHEDULE

<table>
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<th>Date</th>
<th>Time</th>
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<tr>
<td>Friday, January 26, 2018</td>
<td>12:00 p.m. - 4:45 p.m.</td>
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<td>Saturday, January 27, 2018</td>
<td>10:00 a.m. - 3:45 p.m.</td>
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<td>Sunday, January 28, 2018</td>
<td>8:00 a.m. - 12:45 p.m.</td>
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<tr>
<td>Monday, January 29, 2018</td>
<td>10:45 a.m. - 5:30 p.m.</td>
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For 67 years, FMI has surveyed the food retail industry to develop important operational and financial benchmarks ranging from sales and profits to shrink, turns and differentiation tactics.

In 2017, companies that responded to the full survey represent 3,339 stores and, combined with SEC filings, the survey represents 23,362 stores.

What Are the Top Worries of Grocery Industry Leaders?

Speaks contains The Worry Index, where senior leaders in the food retail industry are asked to provide feedback on the positive or negative impact on sales and profits for a list of macro and micro issues. Here are the highlights:

<table>
<thead>
<tr>
<th>Impacting Sales/Profits Negatively:</th>
<th>Impacting Sales/Profits Positively:</th>
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<tbody>
<tr>
<td>Competition (online and non-traditional)</td>
<td>Health and Wellness Proposition</td>
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<tr>
<td>Interchange Fees</td>
<td>Food as Medicine Trend</td>
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<td>Cost of Health Care Benefits</td>
<td>Changing Food Consumption Patterns</td>
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<td>Upward Wage Pressure</td>
<td>Leveraging Technology</td>
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<tr>
<td>State Government Regulations</td>
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For more information, visit www.fmi.org/groceriespeaksgh
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