

collemcvoy

Colle McVoy Key Findings

October 2021

Colle McVoyager

Today, we live in the most complex and rapidly evolving era in human history. With the most discerning and influential consumer class of all time.

As COVID-19 took hold in the U.S., grocery store shelves emptied, restaurants shuttered and farmers dumped milk, buried onions and euthanized livestock. Consumer preferences and perceptions surrounding food rapidly and profoundly changed and adapted.

Colle McVoy recognizes this profound period requires meaningful insights from all stakeholders involved in the food chain. For decades, Colle McVoy has helped food and agriculture brands navigate the ever-changing landscape. But, the challenges ahead require even greater urgency and focus. That is why **Colle McVoyager was born.**

This epic road trip took us cross-country to connect with the farming community that's near and dear to us, as well with individuals across the food system, from chefs to butchers and food shelf directors to home cooks and eaters and everyone in between. The imperative was clear: uncover the stories of these real people to help brands tackle and solve our food system's profound challenges.

This deck is a collection of the **top five findings** from time on the road. Five insights into how our food system is (and isn't) working today based on the firsthand stories and deep knowledge of the people on the front lines.



A scenic rural landscape featuring a dirt road that curves through various agricultural fields. On the left, there's a field of sunflowers with their characteristic yellow flowers and dark centers. To the right, there's a field of tall, green crops, possibly corn or wheat. In the background, a dense line of trees marks the horizon under a sky filled with soft, white clouds.

FINDING #1

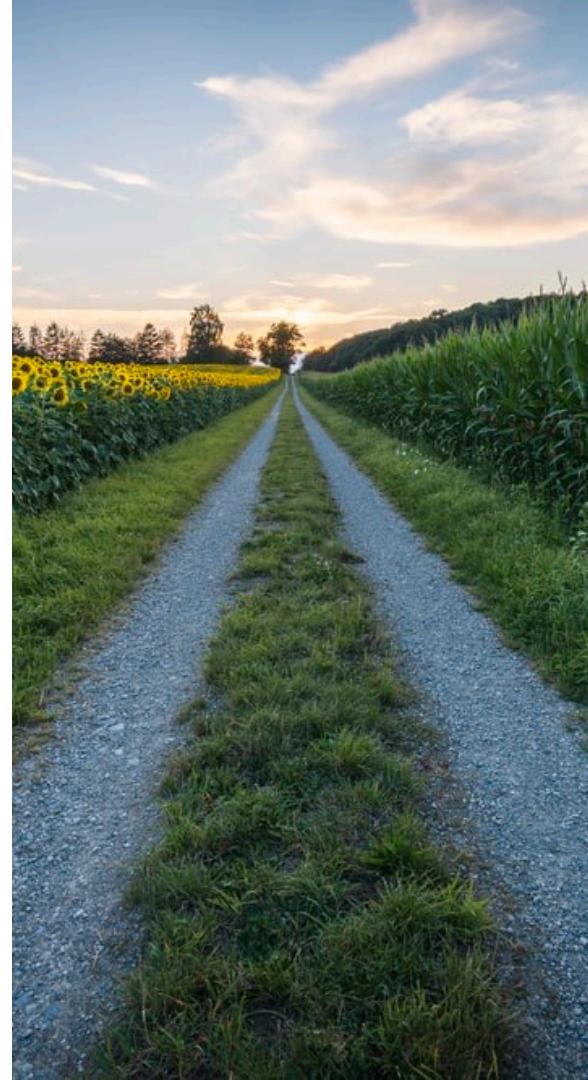
Even our food system is divided

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In truth, there's no such thing as *the* American food system, but rather a series of individual food experiences. From the farmer growing conventional corn to the urban apartment-dweller enjoying the corn-fed pork, we each experience the food system differently.

In communities with easy access to a variety of grocery stores and food options at a reasonable price, our food system is successful. To growers who have seen how hard farming can be in other countries, there's no better country on earth to work in food. Yet to those who despise expensive farming or who experience food insecurity or who are challenged to keep the farm financially viable, our food system is struggling.

Lacking a single definition of success, our food system is at once achieving and missing its goals. With so many consumers experiencing vastly different food systems, it can be challenging for individuals, brands and the government to determine where to start.



Throughout the food system, you'll find strong, divergent opinions about the state of things. While some argue that there is no better place to be a farmer than the United States, others say we need a fresh start entirely or that the system was built broken. Regardless, those in the know recognize that there are poles in our food system.



"There is no better country in the world to be a farmer than the United States."

Cody Heller
CEO, Central Wisconsin Ag Services



"[My dream is to] fundamentally rebuild the American food system from the ground up...one that is not focused on profit, that is not focused on money at all, that's really focused on making sure people are fed. And that the people who are feeding other people are fed as well."

Jesse Schaffer
Urban Farmer



"Some people say our food system is broken; it was totally intentional. What we have was intentional."

Sophia Lenarz Coy
Executive Director, The Food Group

Finding #1

Even our food system is divided

Insight

Ask 100 people how successful our food system is today, and you'll get 100 different answers. Even amid historical and far-reaching divides, our food system stands out as particularly split, with some calling it a success, others a failure and others still a success in its failure.

From farm to fork, the only thing we seem to agree on with respect to food is that we want food that is (per our arbitrary definitions) safe and healthy. There is no one food system, but rather countless individual systems.

Brand Opportunity

In food, it's not enough to use audience definitions to reflect life experiences or correctly place media. Audience definitions in food marketing are a matter of trust. Simply put, brands have a responsibility to not sow greater divisiveness yet still reflect the food system as their customers experience it. Simple questions to ask to determine an individual's experience include:

1. How close to your home is the nearest grocery store?
2. How many farmers do you know personally?
3. What is your food story? Or your personal experience with food?



FINDING #2

Food access is limited in at least one way for nearly all consumers

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Through the proliferation of terms like “[food desert](#)” and “[food accessibility](#),” even those who have access to healthy and nutritious food are now aware that many lack it.

[Approximately 39.5 million people](#) were living in low-income and low-access areas in 2017, 19 million of whom lived with limited access to a supermarket or grocery store. And while it has become an unfortunate reality of this country that a significant portion of our citizens are unable to afford or obtain high-quality food, this isn’t the only form of inaccessibility. [Out of 30,000 edible plants, humans grow only 150](#) and [80% of our protein comes from just four sources](#). There is a world of healthy food that most consumers will never access because they either don’t know it exists, don’t live in a place that has made producing it financially viable or don’t live in a climate where producing it is possible.

To be sure, geographic or financial inaccessibility is far more devastating than a lack of biodiversity on the individual level. But regardless, food inaccessibility is an issue that touches all of us, either directly or indirectly.



Countless Americans are unable to access the healthy food they need (and often want). Farmers and community advocates alike recognize that even though we produce enough food, one of the biggest problems facing our food system is its inaccessibility.



"Despite how cheap it is, our food system here isn't accessible. We have food deserts in LA. We're in a food desert right now. It's not accessible to everyone...I'm sorry - Doritos at 7/11, that's not the food system. That's garbage."

Nicole Leith
Urban Farmer



"I think there's a huge issue with transportation and food apartheid and people not being able to physically get to the food that they need. Or even if they can get to it...they can't afford what are healthy options for them."

Bari Applebaum
Founder, Chicas Verdes



"When you pull all the nutrients out of a tomato just to make it ship better, I think that's indicative of the whole problem."

Cameron Mildreth
Urban Farmer



"There should not be one kid going to bed hungry at night... with the food that's being produced."

Steve Pfaff
Dairy Farmer

Finding #2

Food access is limited in at least one way for nearly all consumers

Insight

Educationally, financially or geographically, nearly every consumer in the United States lacks access to the full breadth of food we can produce. This leads to a self-fulfilling prophecy in food: simplicity and scale over complexity and locality.

Traditionally, food inaccessibility has been defined by the inability to afford or obtain quality, nutritious food. And these remain the largest challenges in food accessibility. But even wealthy urban eaters don't have access to the full breadth of food we're capable of producing.

Brand Opportunities

Food inaccessibility starts with geographic and financial availability. Our food system will only truly be successful when it can feed everyone in it, healthfully. Brands, particularly CPG and grocery brands, have a role to play in bringing products to low-income and low-access neighborhoods.

But for those brands that exist in stores frequented by well-off consumers, expanded accessibility must come in the form of biodiversity: they have a responsibility to expand the palettes of these influential consumers who can (and do) alter what is produced and where.



FINDING #3

We are undercollaborating in every facet of the food system

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Our food system is extremely complex. Its goal is simple: feed everyone healthfully and reliably while paying living wages to individuals who make it possible. But as the world has become more complicated and interconnected, this simple proposition has become obfuscated.

Because of this complexity, few entities have become jacks (let alone masters) of all trades. We have specialization, monocultures and niches. The solution is somewhat simple: collaboration. Regardless of what piece of the food system you (or your brand) touch, there are opportunities to learn from other participants. The conventional farmer can learn about sustainable practices from the regenerative farmer. The food bank can learn from the grocery store. And the Fortune 500 company can learn from the food bank.

With so much specialization, collaboration is as imperative as it is overlooked. Brands and individuals who more aggressively seek collaboration will find unique solutions right under their noses.



From every corner of the food system, there is hunger for more collaboration.



“I’m not anti-big company or anti-big farms, this market right here is really lucky to have General Mills, 3M, Land O’Lakes...but I think if there was a stronger magnetic pull between the large and the small...you can take the best out of both to create a greater access of quality of food from the flavor and nutritional value, if you can meet in the middle.”

Kieran Folliard
Founder, Food Building



“I think our biggest challenge if we look at our whole food system is how to get our food companies and processors to better partner with our farmers. Because they seem unwilling to stand up for farmers. That's not a sexy message.”

Kim Bremmer
Speaker, Ag Inspirations



“There’s a lot of knowledge that comes in from the food industry that can be shared more widely with [food shelves], because...we now think of ourselves as a little grocery store. What knowledge could we get from other grocers about how to properly store things, what’s the newest thing that’s coming out in terms of consumer insights?”

Mary McKeown
President and CEO, Keystone
Community Services

Finding #3

We are undercollaborating in every facet of the food system

Insight

Food-based non-profits and for-profit Fortune 500 companies; vegans and butchers; food pantries and grocery stores; conventional farmers and regenerative farmers. Collaboration throughout our food system is the only way we can reliably feed our citizens the food they want and deserve.

Today, entities have insights and thinking that others can learn from, yet the intense siloing of our food system has left ideas off the table and innovation on the bench.

Brand Opportunities

Be a collaborator. If your brand is for-profit, discuss with non-profits how you can support their initiatives. If your brand works with conventional farmers, work with regenerative farmers to bring more sustainable practices across your supply chain. And if you're a young CPG company, partner with grocery stores to understand which products consumers want most right now.



Organic is due for a reckoning

FINDING #4

Organic is due for a reckoning.

For years, consumers who could afford it have regarded organic as the gold standard of food. These consumers often demonize conventional food as disastrous for their bodies and the environment.

And while it is true that conventional farming has environmental, personal, financial and health challenges associated with it, organic food isn't perfect. In fact, in some regards organic food may be more hazardous for the environment than conventional food because of the greater amount of land and other natural resources required to grow the same amount of food. Reputable sources have pointed out how organic foods may not be all that much better or safer for us than their conventional counterparts.

Farmers are pursuing (certified) organic farming on a scale big enough to be sold at most grocery stores. Today, due largely to marketing, what many consumers perceive of as "organic" or similar such words (e.g., "free range" or "natural") doesn't truly align with the pastoral image in their heads.



Unsurprisingly, those in conventional agriculture are quick to point out how organic is not as great as it seems. But it's not just conventional growers. Even growers with organic experience (and those with experience that could easily be classified as "beyond organic") explain that organic is as much a marketing term as it is agricultural certification. And it's not just organic, other terms like non-G.M.O. are being used on products for which there aren't, in fact, G.M.O. options in existence.



"I think there's a lot of misinterpretation... when you look at the organic market, USDA is really clear that the term 'organic' doesn't mean anything about safety or nutrition...because it doesn't. But that's not the general perception people have. It's a marketing label."

Kim Bremmer
Speaker, Ag Inspirations



"I have nothing against those people that choose to farm that way [organic]. But their milk and their product is not any better than ours. Ours does not have any antibiotics and neither does theirs."

Kristin Pfaff
Wisconsin Dairy Farmer



"I don't think it's quite what some people think it might be."

Jim Love
Minnesota Farmer
(formerly organic)



"I feel like organic is the reason we can't have nice things. It's like this great idea of, 'What if we made a certification that was like a way to distinguish between conventional agriculture and what we're doing?' And then large corporations were like, 'What if we turn this meaningful thing into a meaningless thing?'"

Jesse Schaffer
Urban Farmer

Finding #4

Organic is due
for a reckoning

Insight

Countless consumers rely on terms like “organic,” “non-G.M.O.,” “natural” and “free-range,” to guide them to products they consider superior. But in truth, that’s all these labels may be: a proxy for quality.

While these terms convey a unique (and sometimes superior in some regards) approach, none are the food panacea consumers perceive them to be. The real consumer desire? Confidence that the food they are buying is, in some way, better for themselves, their families, farmers or the planet.

Brand Opportunities

Transparency. Transparency. Transparency. For those brands that rely on non-organic, conventional, G.M.O. or some other consumer-demonized form of food, work to identify the ways in which your supply chain truly is benefiting the world or the ways in which your conventional agricultural inputs are sustainable, safe or healthy.

For organic brands (or brands using similar labels), strive to convey what “organic” means to your brand and how your supply chain partners are doing more than simply adhering to baseline organic standards. In other words, give consumers what they already think they’re getting.

A vibrant display of various fruits including apples, grapes, oranges, and melons in a market setting.

FINDING #5

We're misusing our abundance

We're misusing our abundance.

The United States is flush with land and, specifically, land that can be – and is – used for farming. Yet everywhere you turn, [there are stories of concern](#) over whether we'll be able to feed our growing world and country in the coming years.

The truth is, we're not feeding our growing world and country [today, despite producing more than enough food to do so](#). It's not a matter of producing enough food but rather producing the *right* food in the *right* places, the *right* way. And, most importantly, distributing that food in a way that gets it in the hands of those who need it. This, of course, says nothing of [the incomprehensible food waste we create](#). We are completely misusing our abundance.

This far-reaching problem is not simply the responsibility of brands or governments to solve, either. We need to be more conscientious about food waste and selection as much as we are about distribution and what we choose to grow.



Those who produce food and those who distribute it know that the abundance of our food system is a powerful tool. Yet every day, we fail to distribute and, almost as importantly, showcase that abundance in a way that encourages consumers to engage with the system.



"If your worldview is that food is abundance and it's around you all the time, you have a very different approach to food, and you're very connected to it."

Jesse Schaffer
Urban Farmer



"I believe we have an abundance of food in our community, I just don't believe we distribute it very well."

Mary McKeown
President and CEO,
Keystone Community
Services



"There's such a huge abundance of food. And most of it is just garbage."

Nicole Leith
Urban Farmer



"Are we on track to feed the world by 2030? Yes. By 2050? Probably. By 2075? I don't know. But we evolve and we produce more, and if you look at historical yield numbers and projection numbers, we're on track for that."

Cody Heller
CEO, Central Wisconsin Ag Solutions

Finding #5

We're misusing
our abundance

Insight

The abundance – of land, resources and food – of our food system is a powerful tool that can be used to not only feed but educate consumers. Yet today, we are failing to put that abundance to use.

Consumers constantly hear stories of impending doom in our food system, but we are already capable of feeding billions more people globally. This misinterpretation of the state of our food system negatively impacts how people interact with and appreciate food; they simply aren't seeing abundance in the right ways.

Brand Opportunities

Venture beyond the grocery store. Grocery stores and supermarkets are hallmarks of our food system, but at the same time they've become emblems of our separation from food. The only place to get fresh produce today is in neat grocery store aisles or at farmers markets.

Food needs to be more prominent in communities everywhere. IRL activations that bring food to people in places they aren't used to seeing it can help bring our country's abundance to life.

Summary: Key Findings

1

Even our food system is divided, and brands that fail to acknowledge consumers' vastly different experiences with food will fail to break through.

2

Because the truth is, nearly all consumers face inaccessibility in the food system, and brands can do more to change that.

3

As our food system has become more vast and more specialized, collaboration has become more critical but less common.

4

The impact of uneducated consumers is perhaps most prominent in the organic industry.

5

Despite an unfathomable abundance of food in our country, we continue to fall short of a truly successful food system.

For additional information or to work with Colle McVoy:

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