

# Navigating the Trade Press: What are the food and beverage industries discussing?

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Our public conversation about food and beverage policy is influenced by many sources, including industry stakeholders. We mapped the food, beverage, and advertising trade press, a rich source of information on the industries that, to a large degree, determine what Americans eat.

Download an annotated bibliography of the literature discussed in this report at [bmsg.org](http://bmsg.org).

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## INTRODUCTION

Public health advocates are often at a disadvantage when facing corporate heavyweights from the alcohol, tobacco, food, and firearm industries simply because they are not privy to the same information about products, consumers, marketing and advertising, and other forces that drive the industry. Tobacco control advocates learned this first, and created some of the earliest electronic advocacy tools as mechanisms for sharing information about the industry; now they mine the tobacco industry documents for insights into corporate strategies. Alcohol control advocates have benefited from the Marin Institute's unparalleled alcohol industry and policy database which makes accessible articles from the industry's own literature — expensive and exclusive, but highly informative publications like *Beer Insights and Issues*, along with more popular periodicals like *Advertising Age*. For violence prevention advocates, the Violence Policy Center watchdogs the firearms industry, sends out electronic alerts, and guides advocates to the key publications they should watch to stay informed, such as *American Rifleman* magazine. Public health advocates working to prevent obesity need the same understanding of the food, beverage, and advertising<sup>1</sup> literatures as their colleagues have built for tobacco, alcohol, and firearms.

This report takes the first step on a similar path for obesity by determining which are the few “must read” periodicals from the food, beverage, and advertising industries. We have identified and assessed the key industry periodicals, including standard advertising industry magazines such as *AdWeek* and *Advertising Age*, the Marketplace section of the *Wall Street Journal*, and other more specialized journals from the food and beverage industries such as *Beverage World* and *Food Processing*.

## METHODS

To identify and assess the trade press, we first compiled a list of periodicals from the bibliographies of recent books on food in the United States.<sup>2</sup> We augmented this list with literature available in the Haas Business and Economics and the Bioscience libraries at UC Berkeley, the UC Davis and San Jose State University libraries, and other academic and on-line sources. We were especially interested in identifying sources that routinely discuss the introduction of new products, promotions, and other issues of potential interest for public health advocates and for journalists covering these industries. The result is an annotated bibliography listing those

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<sup>1</sup> We use the term “advertising” throughout this report as a convenient shorthand for advertising, marketing, and other promotion.

<sup>2</sup> e.g., *Food Politics: How the Food Industry Influences Nutrition and Health*, Marion Nestle. Berkeley: University of California Press, 2002; *Fat Land: How Americans Became the Fattest People in the World*, Greg Critser. New York: Houghton Mifflin Company, 2003; and *Fast Food Nation: The Dark Side of the All-American Meal*, Eric Schlosser. New York: HarperCollins, 2002.

publications, with a description of the kinds of information in each. This report summarizes highlights from the bibliography and explains how regular monitoring of the industry literature might aid advocacy efforts to prevent and reduce obesity.

## **HOW TO USE THIS INFORMATION**

This report emphasizes several periodicals from the bibliography that, in our opinion, provide insight into how the food industry thinks — at least how it thinks in public. If advocates regularly review these sources, they will be on top of the issues that head the food and beverage industries' agenda. Below we describe these sources, how often they appear, where to find them, and what to expect when you peruse them.

The food and beverage industries are complex and broad in scope. The number of products itself is dizzying, and the business and science associated with food cultivation and production, including agriculture, marketing, transportation, cooling, manufacturing, processing, storing, freezing, flavoring, coloring, distribution, hospitality, and consumer research, characterize a field with innumerable sub-categories and specializations, all of which have their own publications and concerns. What we have compiled here is a broad survey of this literature.

The bibliography of more than 200 titles from the food, beverage, and advertising industries is available to download at [www.bmsg.org](http://www.bmsg.org). The spreadsheet includes the titles, publishers and Internet addresses of the listed publications in addition to descriptions of content. Many food products or special aspects of the industry have their own trade associations, such as the National Cattlemen's Beef Association or the Sugar Association, and their Web sites and electronic publications provide a wealth of information for their members. The most current and comprehensive sources of information across sectors of the food and beverage industries are typically Web-based and may require membership and/or subscriptions for access to the full on-line content. The Grocery Manufacturers of America and the Food Institute are the most prominent of these broad-spectrum Web sites, and are included in the bibliography.

Advocates can use the information in the bibliography, and the assessments in this summary report, to identify which periodicals they want to monitor. Advocates may act proactively or reactively to what they find in the industry literature. By keeping abreast of the industries' discussions, advocates can

- Identify emerging issues of concern to the food, beverage, and advertising industries;
- Learn about new marketing and promotion before the campaigns are released to the general public;
- Learn how the industry is reacting to public health efforts to reduce and prevent obesity; and
- Anticipate food and beverage industry arguments and counter-arguments to public health proposals.

Instructions for using the annotated bibliography are at the conclusion of this report.

## **WHAT ARE THE FOOD, BEVERAGE, AND ADVERTISING INDUSTRIES TALKING ABOUT?**

The food, beverage, and advertising literature is so vast, keeping abreast of it all could be a full time job. No advocate has time for that, yet if the food, beverage, and advertising industries' behavior is having an impact on obesity — or public health's efforts to prevent it — then advocates need a way to learn what the industries are doing and what they consider important. To accomplish that goal without becoming overwhelmed, we recommend that public health advocates monitor a few key sources daily, peruse other sources regularly, and become familiar with the specialty journals that relate directly to their issues of concern.

### **Daily News Sources: the *New York Times* and the *Wall Street Journal***

One of the best and most easily accessible sources of information on the food, beverage, and advertising industries' activities is the Advertising column in the Business section of the ***New York Times***. In many ways, business reporters are interested in the same questions as public health advocates, though for different reasons. Business reporters want to inform readers about whether companies are wise investments — they report on the potential for new products to capture market share, new marketing campaigns to win customers, consumer reaction, and government regulation. To keep on top of these topics, business reporters monitor the types of literature described in the annotated bibliography we developed in conjunction with this report, and they cultivate and talk with personal sources at food and beverage companies and advertising agencies. The business topics covered on this beat can inform public health advocates as well. The business pages of national newspapers like the *New York Times*, *Wall Street Journal* (especially the Marketplace section), *Los Angeles Times*, and *Washington Post*, can be an advocate's first screen for news about the food and beverage industries.

These daily sources can be quickly scanned because not every day will bring news about food and beverage company actions. In the *New York Times*, for example, big campaigns are announced (e.g., McDonald's "I'm Lovin' It") and major news stories are discussed (e.g., the flap over KFC's fried-chicken-as-health-food campaign). The day before KFC's campaign launched, the *New York Times* Advertising column reported the content of the television spots as well as the challenges to the concept of selling fried chicken as a health food.<sup>3</sup> Quotes from ad industry executives say the campaign is doomed because it is counterintuitive: "We've all been trained to know that fried foods are a bad idea," says Steve Lawrence, executive from a brand consulting company. The campaign is put in the context of KFC's sagging domestic

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<sup>3</sup> Ives, Nat. Advertising: With Obesity on Many Minds, KFC Pushes a Theme That Its Fried Chicken Has a Place in a Healthy Diet. *New York Times*, October 28, 2003.

sales alongside new concerns about obesity. The KFC campaign appears in the *New York Times* again a few months later when the Advertising column is reporting on how often fast food chains fire their ad agencies.<sup>4</sup>

The *New York Times*' Advertising column also explains campaign strategies. In one column in December 2003, the *New York Times* reported how more and more companies are licensing characters from popular children's shows to associate with new products in the \$700 million dry fruit snacks category (gummy fruit snacks).<sup>5</sup> The column acknowledges the rising "scope and intensity of the blitz" on "unwitting youth," but the concern is from the perspective of advertisers who worry that the characters will become overexposed and so lose their appeal. Licensing, the column explains, is a mechanism for companies to control the level of exposure. The column also includes basic data on children as a market segment, noting that "in 2004, children under 12 will spend \$35 billion of their own money and influence \$200 billion in household spending." The column serves the business audience by explaining how licensing works to benefit sales by leveraging the other exposure the character receives ("you're actually hitchhiking on a larger media or food company's campaign").

Even though the Advertising column in this instance is primarily about the value of using cartoon characters to promote gummy fruit snacks to kids, concerns about the broader effects of food marketing seep into the column, including a quote from one source who notes that "kids can't make informed decisions, and up until the age of 6 they don't understand the issue of persuasion or manipulation." At the end, the column reports, responsibility to resist unhealthy snacks rests with parents. The column quotes Sally Lee, editor in chief at *Parents* magazine: "...parents cannot abdicate responsibility for what comes into their homes." But, parents have their work cut out for them, as the CEO of Brach's Confections reports: "We've been growing double digits for the last 3 years and we expect much the same in 2004." In this instance, the *New York Times* Advertising column provides an encapsulated version of the very debates public health advocates are confronted with as they educate legislators and the public.

The ***Wall Street Journal's*** Marketplace section provides a similarly rich daily source of information about the food and beverage industries. Articles range from cover stories about emerging issues or hot topics ["New in School Vending Machines: Yogurt, Soy"<sup>6</sup>; "Missing Ingredient in the American Diet: Fiber Has Been All but

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<sup>4</sup> Mehegan, Sean. Advertising: In the Last Year, 17 Restaurant Chains Have Fired Their Agencies. A Sign of the Times. *New York Times*, November 10, 2003, page C13.

<sup>5</sup> Kane, Courtney. Advertising: TV and Movie Characters Sell Children Snacks. *New York Times*, December 8, 2003, page C7.

<sup>6</sup> Byron, Ellen. New in School Vending Machines: Yogurt, Soy. *Wall Street Journal*, October 15, 2003, page B1.

Eliminated From Convenience Products”<sup>7</sup>; and “Downsize This! After Years of Supersizing, Food Makers Shrink Portions (And Fatten Profit Margins)”<sup>8</sup>] to company news from a shareholder’s perspective (“Coke Sees 12% Increase in Earnings”<sup>9</sup>; “Chuck E. Cheese Wins in Niche Market”<sup>10</sup>) to stories about government action and implications (“Regulators Unveil Rules to Protect U.S. Food Supply”<sup>11</sup>). The *Wall Street Journal* also has an active advertising column that frequently includes campaign reviews and ad agency action concerning food and beverage companies (“Quiznos Sub Selects Martin Agency”<sup>12</sup>; “Legendary Swinger Has New Career as Burger Pitchman”<sup>13</sup> for a story about Hugh Hefner signing on as a spokesman for Carl’s Jr).

In its cover stories, the *Wall Street Journal* explores issues in depth with what journalists call “enterprise reporting” (stories generated by the digging reporters do on their own to unearth important topics, as opposed to reporting generated from news releases). One example is Michael J. McCarthy’s pair of stories on fiber’s declining presence in U.S. diets and the resulting rise in diverticulitis.<sup>14</sup> McCarthy explores an important public health story, touching on the implications for food companies (“processing out fiber...gives packaged foods smoother texture and extends their shelf life”). This set of stories would be a boon to advocates working to bolster the fiber content in American diets. They could send the stories to colleagues or policy makers, respond to the stories with letters to the editor, and, at minimum, contact the reporter and cultivate a relationship so that in the future, when new research or policy on this issue arises, it will be easier to pitch the story.

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<sup>7</sup> McCarthy, Michael J. Missing Ingredient in American Diet: Fiber Has Been All But Eliminated From Convenience Products. *Wall Street Journal*, October 22, 2003, page B1.

<sup>8</sup> McKay, Betsy. Downsize This! After Years of Supersizing, Food Makers Shrink Portions (and Fatten Profit Margins). *Wall Street Journal*, January 27, 2004, page B1.

<sup>9</sup> Terhune, Chad. Coke Sees 12% Increase in Earnings. *Wall Street Journal*, October 17, 2003, page B5.

<sup>10</sup> Freeman, Adam L. Chuck E. Cheese Wins in Niche Market. *Wall Street Journal*, October 29, 2003, page B4C.

<sup>11</sup> Foley, Ryan J. Regulators Unveil Rules to Protect U.S. Food Supply. *Wall Street Journal*, October 10, 2003, page B5.

<sup>12</sup> Vranica, Suzanne. Quiznos Sub Selects Martin Agency: Sandwich Chain Generates Buzz with Offbeat Spots, Squares Off Against Rivals. *Wall Street Journal*, October 6, 2003, page B7.

<sup>13</sup> Steinberg, Brian. Legendary Swinger Has New Career as Burger Pitchman. *Wall Street Journal*, October 30, 2003, page B1.

<sup>14</sup> McCarthy, Michael J. Missing Ingredient in American Diet: Fiber Has Been All But Eliminated From Convenience Products. *Wall Street Journal*, October 22, 2003, page B1 and McCarthy, Michael J. Diverticulitis: Link to Low Fiber. *Wall Street Journal*, October 22, 2003, page B4.

In another story, reporter Ellen Byron reports on new healthier fare making its way into vending machines on high school campuses.<sup>15</sup> She reports on organic-food companies' desire to capitalize on "the anti-junk-food movement." The pilot programs are testing whether students will buy the higher priced, but more healthful, options. The story encapsulates many of the arguments that surface whenever vending machines in schools are at issue: whether the students will buy the products and whether or how the schools and the companies benefit. The school's principal says, "If we don't sell junk food, these kids are going to buy it elsewhere." Advocates can read these types of stories and become informed about industry tactics and motivations for in-school sales and the arguments of educators against making changes.

### Major Advertising Trade Magazines: What's Hot or Not?

While major daily newspapers like the *New York Times* and *Wall Street Journal* do a good job covering new launches and big news from the advertising and food and beverage industries, advocates should also read *Advertising Age* or *AdWeek* if they want an in-depth look at the issues advertisers are concerned about. Both sources provide news on new product launches, changes at major firms, and the implications of market trends or breaking news on the advertising industry as a whole. What these sources add to the discourse is criticism and reflection about advertising itself, albeit from the perspective of those dedicated to it. They debate, for example, the benefits of advertising — whether it really works or whether they are pulling the wool over their clients' eyes — and how the industry should prepare for the imminent death of its cash cow, the 30-second television commercial. They can also help advocates learn to consider advertising campaigns and their effects within the larger realm of marketing and promotion.

For example, an article from *Advertising Age* asks the question of McDonald's "I'm Lovin' It" campaign: did the new ads contribute to recent growth — the best same-store sales in five years (up 8.4%)?<sup>16</sup> The well-publicized campaign has extensive reach, news coverage on the business pages of newspapers, and rave reviews from company executives (if not all franchisees), *Advertising Age* reports. But consider the other factors that likely influenced the sales spike. In order of appearance in the *Advertising Age* article, they are:

1. new menu items
2. better training (1 & 2 are both part of former CEO Jim Cantalupo's "turnaround plan")
3. "Monopoly" scratch-off game promotion
4. new Premium Salads
5. new McGriddles breakfast sandwiches

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<sup>15</sup> Byron, Ellen, *op cit.*

<sup>16</sup> MacArthur, Kate. McD's Sees Growth, But Are Ads a Factor? *Advertising Age*, November 24, 2003, page 3.



6. fewer new store openings
7. longer operating hours
8. solid sales from the Dollar Menu
9. weak sales from rival Burger King
10. positive word-of-mouth.

The list offers various explanations for rising sales besides advertising. The fact is, even in the well-watched commercial world, it is very hard to isolate the effects of a media campaign, in part because no commercial marketer would ever rely on advertising alone. Applying the four “p’s” of marketing, we see that McDonalds is working to improve the **product** (new salads and breakfast sandwiches), **price** (Dollar Menu), **place** (better training, longer operating hours, concentrating on existing stores), as well as **promotion** (the ad campaign, plus “Monopoly” scratch-off game and positive word-of-mouth). Evaluating the impact of media interventions is tough, even for the most sophisticated companies with profit margins at stake.

Overall, the article teaches us that marketing is a broad concept. Any public health efforts to address marketing excesses that contribute to obesity will have to address all its forms to have the broadest impact.

*Advertising Age* is probably the most comprehensive source for the industry point of view on whether its marketing does the job, what the campaigns are trying to accomplish, and even some criticism of campaigns. *AdWeek* covers the same ground in a slightly different format. Both have up-to-the minute Web sites that offer email news alerts to subscribers.

### **Specialty Industry Journals: Research Galore**

So far we have highlighted popular and easily accessible publications that shed light on the workings of the food, beverage, and advertising industries. To gain a more in-depth knowledge and understanding of the complexity of various players in the food, beverage, and advertising industries, it is necessary to seek out other sources.

At this point, however, the sources quickly become specialized and esoteric. We therefore can make only a few recommendations we think any public health advocate may be interested in; beyond that, we recommend searching the annotated bibliography to find the periodicals that will suit your needs. A more detailed description of the annotated bibliography is at the conclusion of this report.

The few specialized industry sources that we think will have broad appeal to public health advocates are the Web sites of the Grocery Manufacturers of America and the Food Institute. These sites could be monitored daily, much a like newspaper, as their content changes in response to both industry and regulatory news. Another excellent summary source is Food Chemical News, which is focused on food industry regulation, and its associated Web site, Obesity Policy Report, a compilation of obesity-related news of import to the food industry, from the industry’s perspective.

The Obesity Policy Report is a tidy Web site encapsulating key regulatory battles, a good starting point for advocates who want a digest of food industry concerns.

Overall, then, public health advocates will be alerted to food, beverage and advertising practices if they peruse one of the major daily newspaper business section Advertising columns (*New York Times*, *Wall Street Journal*, *Los Angeles Times*, etcetera), a weekly advertising magazine (*Advertising Age*, *AdWeek*), along with whatever specialized periodical or Web site they identify from the annotated bibliography.

### **Tidbits & Tasty Morsels: The Industry in Its Own Words**

Reading the industry periodicals and Web sites reveals the perspectives and motivations of members of the food, beverage, and advertising industries. Their job is to make products that will sell and produce profit for their shareholders. The literature reminds us that despite the health consequences of those industries' actions, the public's health is not their principle concern. Reading these sources makes it easier to articulate the divergent goals of public health and the food, beverage, and advertising industries. Understanding the various industries' motivations will enable advocates to help others see the contrast between the goals of the marketplace and public health goals, and how the contrasting values should be reconciled in public policy. While these divergent motivations — profit versus public health — may seem obvious, they aren't always. In some contexts, industry may downplay its profit motive and highlight its role as "good corporate citizen." Coca-Cola's 2003 \$1 million donation to the American Academy of Pediatric Dentists is an example.<sup>17</sup> Quotations from the industry representatives in their own words can inform advocates, who can then share those words at key moments, as when advocates are giving legislative testimony, talking with policy makers, and in other situations when they must clarify the competing interests between food producers and public health.

For example, a quotation in the *Wall Street Journal* from soy milk producer Steve Demos explains the larger goal of why beverage marketers work hard to have vending machines in the schools. In the article Demos is quoted saying: "In essence, you build the habit of drinking soy milk when they're young, they stay with it when they're older, and they probably will pass it on to their children."<sup>18</sup> While this may be a good idea when the product is soy milk, it is not such a good idea when the product is a beverage high in sugars. Demos' quotation illustrates that with the placement of vending machines in schools, beverage purveyors are buying *generations* of consumers, though that is not usually the reason they give for wanting exclusive contracts with schools. Immediate benefits certainly exist for beverage marketers in the vending machine wars — "Sell more soda, make more money," as Todd Sitzler,

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<sup>17</sup> Burros, Marian. Dental Group is Under Fire for Coke Deal. *New York Times*, March 4, 2003, page A16.

<sup>18</sup> Byron, Ellen, *op cit*.

chief executive of Cadbury Schweppes put it.<sup>19</sup> But, as we learn from Steve Demos' statement, there is more at stake than today's revenues from the vending machine sales; beverage companies are purchasing that and more, including this and future generations' consumer loyalty and revenues. Public health advocates will be better able to add this aspect of companies' motivation to public debate about vending machines in schools if public health advocates monitor the industry literature and inform their colleagues about what they find.

In fact, some industry spokespeople's words echo the messages repeated by tobacco company strategists in their secret documents: "We've got to recruit new users and hold on to users as they age," Bill Elmore, president and CEO of Coca-Cola tells the *Wall Street Journal*.<sup>20</sup> The value of watching the industry literature is that it reminds advocates that companies have a fiduciary responsibility to be sure that increasing profits is always the lens through which they make decisions about their products, marketing and promotion campaigns, and public policy.

Accordingly, food, beverage, and advertising companies will go to great lengths and great expense to protect current and future profits. One example comes from an *Advertising Age* article, "Food Marketers Latch on to Health."<sup>21</sup> This article explains why Kraft and others will create new products to capitalize on current diet trends like "low carb" even though they know the trends fade in about two years, well before the products will become profitable. In a statement to St. Joseph's University marketing professor John Stanton, a food industry executive explains: "In the long run, it will be cheaper to offer those items to consumers even if they don't make money than to pay lawsuits for not giving consumers choices." In what will appear to the public as a responsive effort to create low-carb foods, the company is really trying to indemnify itself against potentially expensive jury verdicts in the future.

In a similar vein, *Advertising Age* reports on PepsiCo's motivation behind its sponsorship of a fitness program to help members of the School Food Service Association (school lunch workers) lose weight and become better role models<sup>22</sup>: "The sponsorship allows PepsiCo to put its healthier portfolio, including Aquafina water, baked versions of Frito-Lay chips and Tropicana beverages, in front of those who decide what goes into school vending machines." Kraft also signed up as a sponsor of the School Food Service Association, *Advertising Age* reports. By reading *Advertising Age* advocates can learn that the sponsorship is as much a mechanism for introducing new products into school vending machines as it is a good deed on the parts of PepsiCo and Kraft.

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<sup>19</sup> Jones, Adam. Cadbury Aims for Sweeter Future. *Los Angeles Times*, November 10, 2003, page C3.

<sup>20</sup> McCay, Betsy, *op cit*.

<sup>21</sup> Thompson, Stephanie. Food Marketers Latch on to Health; Kraft, Campbell, Others Play Up Low-carb, No Trans-fat Offerings. *Advertising Age*, February 23, 2004, page 4.

<sup>22</sup> Thompson, Stephanie. Schools Get the Food Message. *Advertising Age*, March 29, 2004, page S-6.

Another issue of *Advertising Age* contained an article about how Frito-Lay (part of PepsiCo) will be targeting health workers with its new line of “sensible snacks” because health workers are such a trusted source of information. “Health professionals are very trusted by consumers, and we want to help them help consumers place [Frito-Lay] products in their lives,” according to a Frito-Lay representative quoted in the article.<sup>23</sup>

While the above examples highlight the responses of industry members to stress the “healthfulness” of their new products, many publications are taking a look at the obesity epidemic, examining how it will affect them, and whether they have any culpability in making America fat.

A recent cover of *Beverage World* featured plastic soda bottles in the crosshairs of a rifle scope with the line: “Caught in the Crosshairs: As a Nation Struggles with Obesity, Soft Drinks Come Under Attack.”<sup>24</sup> Inside were articles on “Circling the Wagons: Soft Drink Companies Can Learn a Few Lessons From Others Who Came Under Attack”<sup>25</sup> about what can be learned from the experiences of the tobacco and alcohol industries, and “Getting Mobilized: Under Fire for a Purported Role in Childhood Obesity, Beverage Companies Are Finding the Best Defense is a Strong Offense.”<sup>26</sup> By keeping abreast of these magazines, public health advocates will see more clearly how the industry will maintain its strong offense. As one magazine editor stated, “Like Mom, the flag and apple pie, soft drinks have stood as American icons for generations,”<sup>27</sup> and taking on an icon is going to be long, hard work. In an op-ed, Sean McBride, the Director of Communications for the National Soft Drink Association, an \$83 billion a year industry, called policies to restrict the availability of soft drinks “social engineering.” His answer to the obesity epidemic is typical of those in the other industries like alcohol, tobacco, and firearms that inspired this report: “As with most public health challenges, more and better consumer education is the answer.”<sup>28</sup>

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<sup>23</sup> Thomson, Stephanie. Frito-Lay homes in on Health Workers. *Advertising Age*, February 23, 2004, page 41.

<sup>24</sup> *Beverage World*, November 13, 2003.

<sup>25</sup> Todd, Heather. Circling the Wagons: Soft Drink Companies Can Learn a Few Lessons From Others Who Came Under Attack. *Beverage World*, November 13, 2003, p. 24.

<sup>26</sup> Cioletti, Jeff. Getting Mobilized: Under Fire for a Purported Role in Childhood Obesity, Beverage Companies Are Finding the Best Defense is a Strong Offense. *Beverage World*, November 13, 2003, page 26.

<sup>27</sup> Foote, Andrea. Commentary: The Story of the Year. *Beverage World*, November 15, 2003, page 6.

<sup>28</sup> McBride, Sean. Are Soft Drinks Responsible for the Obesity Epidemic? *Beverage World*, November 15, 2003, page 23.

Paying attention to industry publications will not only make advocates aware of the individual products and campaigns coming down the pike, but also gain an appreciation for the larger shifts within the industries, such as the growing interest in the U.S. Latino market. According to Herb Scannell, the president of Nickelodeon Networks, “Latinos are the emerging middle class whose purchasing power is expected to nearly double to \$926 billion by the year 2007.”<sup>29</sup> Awareness of this market potential is reflected in the growth of Spanish-language newspapers<sup>30</sup>, and products are being tweaked to appeal to the Latino market. For example, the Campbell Soup Company added two new V-8 Splash flavors, with English and Spanish on the bottle labels. Marketers are expanding their tents, inviting Latinos and other target markets in: “The Coca-Cola Co., the definition of most things American, has added Minute Maid Limonada to its ready-to-drink Minute Maid line.”<sup>31</sup> Every indication is that target marketing will become even more intense in the future.

## CONCLUSION

The literature generated by the food, beverage and advertising industries is vast and varied. Public health advocates’ previous experience with other industries that affect health, including tobacco, firearms, and alcohol, cannot approach the scope and complexity of the food industry and the corresponding challenge for public health advocates. This report is one step toward taming that complexity, to make it more manageable and focused for use by public health advocates.

To download the annotated bibliography spreadsheet, go to <http://www.bmsg.org/content/82.php>.

## GUIDE TO THE ANNOTATED BIBLIOGRAPHY

Assembling this bibliography was no small task; it turned out to be a complicated undertaking as the food, beverage, and advertising industries represent a wide and varied spectrum of activities and perspectives. The sources listed in the spreadsheet make this diversity of mission and approach clear. To facilitate the ease of use of the bibliography, we have divided the publications into two broad categories, distinguishing between the **business** and the **science** of food, beverages, and advertising. While there is of course overlap, this distinction is a useful way to sort the volume of publications. We have grouped both business and science publications into three tiers that relate to the periodical’s level of abstraction or immediate applicability. Tier 1 includes publications that focus on the latest market and regulatory news, and their impact on aspects of the food, beverage and advertising

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<sup>29</sup> Scannell, Herb. Continuing to Build on a Tradition of Diversity. *Advertising Age*, March 15, 2004, page N20 of special advertising section.

<sup>30</sup> Wentz, Laurel. Print Sees Hope in Hispanics. *Advertising Age*, May 3, 2004, page 78.

<sup>31</sup> Theodore, Sarah. Beverage Beat: The Great Melting Pot? *Beverage Industry*, October 2003, page 8.

industries. Tier 2 provides both specialized industry information as well as analyses of the broader market and cultural trends and their implications. Tier 3 publications are primarily peer-reviewed research for a technical audience. We describe each tier as it is expressed in the business and science publications below.

**The business of food, beverages, and advertising.** Publications primarily concerned with the business side focus on creating, advertising, marketing, and selling products. They range from discussions of current products, promotions, and the marketplace, to periodicals focusing on policy and regulation, to academic research journals on marketing, advertising, and economics, among other business-related disciplines.

The **first tier** of business periodicals consists of trade publications, such as *Food Processing* or *Restaurants & Institutions*. These magazines speak directly to their industry audience about the bottom line impacts of changes in product design, production, marketing, and regulation. The emphasis is profit, not theory. These are the publications that will be of most immediate use to advocates looking to stay abreast of the trends within and across industries. These periodicals are published weekly, monthly, or bimonthly. Advocates will want to take a look at all of the sources listed under this tier and decide, based upon their goals, which journals to review regularly. Four beverage-focused publications, *Beverage Aisle*, *Beverage Digest*, *Beverage Industry*, and *Beverage World* are in the first tier, reflecting the importance of sodas and other beverages as a focus of policy action. Each of the four has a slightly different view on the industry, and advocates should determine which source best suits their needs.

The **second tier** of business publications includes those that straddle the realm between “on the street” activities and academic or highly technical and specialized research. Publications like *Dairy Foods* encompass specialized niches within the food, beverage, and advertising industries, and this tier also includes business-to-business publications, such as *Marketing to Emerging Majorities*. Advocates will find much of the information from these periodicals directly applicable to their work. We have also included in this category government publications like *Amber Waves* from the U.S. Department of Agriculture (USDA) that contains research and analyses on food and agriculture.

Regional food industry sources (for example, *Empire State Food Service News*) are in the **third tier**, reflecting their more limited applicability. We have also grouped peer-reviewed social science and business journals that publish basic research and theory, with a target audience of academics and professional researchers, in this tier. These journals will be useful for advocates studying a particular subject, such as the theories and analyses of markets and consumer behavior. Examples from this tier include the *Journal of Consumer Research* and the *Journal of Food Products Marketing*.

**The science of food and beverages.** These journals focus on the biological and chemical aspects of food and beverages, and range from information for those out in the field cultivating crops to bench scientists in white lab coats. Growing the raw materials, refining them, mixing them into different combinations for different types of products, to be frozen, stored, canned, boxed, etc., is a complicated scientific process that involves myriad investigations at the molecular level. These journals also include the non-business related aspects of understanding individual and social behavior, as well as public health and nutrition perspectives.

The **first tier** of science publications and Web sites includes those publications related to scientific disciplines and those generated by professional associations or societies. Though not likely to be quite as useful to advocates as the top tier of the business category, these can nonetheless shed light onto the concerns of various players in the food and beverage industries' orbit. For example, *Chemical & Engineering News* is a publication of the American Chemical Society. Its Web site, in particular, is full of current information on trends important for its members, including government regulation as well as business news. The members of the American Chemical Society want to protect their interests and they are important players in the food and beverage industries. It is the chemists, after all, who come up with new formulations for Coca-Cola, among other products. Therefore, news items on its Web site can provide a different perspective on the same issues found on other food industry Web sites.

We have also placed "health-related" Web sites, such as that of the International Food Information Council ([www.ific.org](http://www.ific.org)), and [Beefnutrition.org](http://Beefnutrition.org), in this tier. These sites, sponsored by the food and beverage industries, aim to share health and nutrition information with consumers and professionals, subtly featuring the sponsor's products and good corporate citizenship.

The **second tier** of the science journals bridges the abstract with the applied aspects of science. These include public health journals, food history and culture, and journals studying the behavioral aspects of eating disorders and nutrition. Many of these journals are psychology or other social science journals, focused on understanding the broader context of food and personal experiences. Examples include *Appetite* and *Critical Reviews in Food Science and Nutrition*.

The **third tier** of science journals covers bench science, wherein scientists are examining the chemical, biological, and physical properties of foodstuffs, and the growing, processing, and storing that ultimately turns them into products for consumption. Examples of these specialized journals include *Field Crops Research* and the *Journal of Cereal Science*. Nutrition journals focused on the biochemistry of nutrition and micronutrients are here as well. These journals have a strong academic and technical flavor, and unless one has a strong background in molecular biology, say, or chemistry, many of these journals' articles, such as in *Food and Chemical Toxicology*, will be like reading a foreign language. These journals will be useful for those researching particular topics, and there are occasional gems to be found in the

book reviews, but otherwise, these journals will be of only minimal interest to those curious about products coming to market.

**How to use the annotated bibliography spreadsheet.** The annotated bibliography includes the sources described above — those that focus on the food and beverage industries as well as general advertising and marketing journals that cover a range of products. The marketing publications are likely to provide important insights into the overall business methods essential to encouraging consumers to buy products. Journals with an international scope are also included as there is much to be learned from sources beyond U.S. borders, and because the food, beverage and advertising industries are international. Scientific discoveries or battles over regulation in other countries can provide advance notice of conflicts to come in the U.S., and help advocates be both aware and prepared.

The publications are organized alphabetically in an Excel spreadsheet you can download from [www.bmsg.org](http://www.bmsg.org). One column indicates whether the journal falls under **business** or **science**; a second column assigns the journal to one of the three tiers described above. While the sheet first appears in alphabetical order to ease the identification of specific publications that one may have in mind, to browse within categories, the listed sources may be sorted into either **business** or **science** and by tier, if so desired. You may also sort by publisher or by any of the columns.

To find the source that interests you among the categories and tiers, examine the publication descriptions. Most of the information is in direct quotes as it comes from the journals or publishers themselves. Statements without quotes are our assessment of the publication's typical contents. Where possible, Web sites have been included that provide access to the publications directly, to their on-line equivalent, or to their publisher. Some of the sites will let you browse the tables of contents or sample editions, but access to actual text is usually limited to subscribers. For a handful of sources, little information other than the publication's title was available.

Please note that the category distinctions between **business** and **science** aren't absolute. Some journals, like the *British Food Journal*, encompass aspects of the food and beverage industries, as well as research and practice. We placed it in "Business" since it does make a concerted appeal to retailers. Other journals, like *Innovative Food Science and Emerging Technologies*, are designed to appeal to industry lab-based food researchers. These have been categorized as "Science" because the target audience works at a very technical level that is many steps removed from products coming to market. Such journals contain less of the user-friendly "news you can use" that would be most beneficial for advocates.

The few anti-hunger and activist journals, like *Food and Nutrition Bulletin* and *Consumer's Research Magazine*, have been noted with an asterisk (\*).



Table 1. Trade Press Publications

	<b>Business</b>	<b>Science</b>
<b>Tier 1</b>	<p>Publications and Web sites that feature breaking news, new products and/or promotions, and industry news.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> <li>• <i>Advertising Age</i></li> <li>• <i>Beverage World</i></li> <li>• Grocery Manufacturers of America</li> <li>• <i>New York Times</i></li> </ul>	<p>Publications and Web sites that feature science, health, regulatory news, and information.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> <li>• Beefnutrition</li> <li>• <i>Chemical &amp; Engineering News</i></li> <li>• Food Science Central</li> <li>• International Food Information Council</li> </ul>
<b>Tier 2</b>	<p>Publications with specific niches within the food and beverage industries; business-to-business communications; general business, not food and drink specific.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> <li>• <i>Amber Waves</i></li> <li>• <i>British Food Journal</i></li> <li>• <i>Dairy Food</i></li> <li>• <i>Marketing to Emerging Majorities</i></li> </ul>	<p>Publications may or may not be peer-reviewed; food culture, history, nutrition, epidemiology, or public policy focus.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> <li>• <i>Appetite</i></li> <li>• <i>Critical Reviews in Food Science and Nutrition</i></li> <li>• <i>Journal of Food Processing and Preservation</i></li> <li>• <i>Public Health Nutrition</i></li> </ul>
<b>Tier 3</b>	<p>Peer-reviewed social science journals; regional food and/or business publications.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> <li>• <i>Empire State Food Service News</i></li> <li>• <i>Journal of Consumer Research</i></li> <li>• <i>Journal of Food Products Marketing</i></li> <li>• <i>Marketing Science</i></li> </ul>	<p>Peer-reviewed technical, scientific journals, including the biochemistry of nutrition.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> <li>• <i>Field Crops Research</i></li> <li>• <i>Food and Chemical Toxicology</i></li> <li>• <i>Innovative Food Science and Emerging Technologies</i></li> <li>• <i>Journal of Cereal Science</i></li> </ul>