

# From Policies to People:

How Coronavirus Changes Conversations



## Top Ten Topics: First Quarter 2020



As the calendar transitioned to 2020, we expected more of the same: strong discussions around international trade policy, debates about plant-based meat and perhaps even predictions of difficult weather impacting planting season. However, the coronavirus crisis quickly shifted conversations away from food policy issues and toward humanitarian causes.

Most notably, attention to workers and employee relations skyrocketed. Like many other things categorized as “unprecedented,” never before have we tracked such a large increase in conversation volume over such a short period. Throughout the entire food supply chain, from farms and food production to retail and foodservice channels, concerns about the health, safety and compensation of the workforce sent shockwaves throughout the food system.

The magnitude of the effects of the coronavirus crisis cannot be overstated, particularly for the food and agriculture industry. To comprehend just how dominant the crisis has been for influential figures in the industry, this report includes a [focus feature](#) addressing how the crisis has shaped conversations between industry leaders.

In terms of our rankings, the coronavirus and its takeover of discussions was so thorough that meatless foods, protein and climate change sparked 30% fewer conversations compared with the previous quarter, yet still remained in the Top Ten Topics. Meanwhile, attention to health and hunger increased as the crisis diverted attention to the quantity and quality of foods available to Americans.

## Highlights from this report:



### WORKFORCE

**Workers emerged as the primary focus during the coronavirus pandemic.** Health, safety and compensation emerged as topics for workers in processing, retail and delivery. Meanwhile, layoffs sidelined the bulk of foodservice workers.



### INTERNATIONAL TRADE

**Just as trade began picking up, the coronavirus disrupted the normal flow of goods.** The Trump administration reached deals with China, Canada and Mexico in January. But lockdowns limited how much U.S. food producers could export to other nations.



### HUMAN HEALTH

**Beyond the pandemic, health concerns gained ground as lockdowns changed dietary patterns.** Heavy hitters in nutrition science turned attention to how diet choices impact long-term health.

**“WE NEED TO CONTINUE TO PRODUCE IN THIS CRISIS. THAT’S THE FIRST STEP OF NORMALCY FOR A LOT OF PEOPLE IS YOU SHOW UP TO THE GROCERY STORE AND IF THERE IS FOOD ON THE SHELF.”**

— STEVE PRESLEY, CEO, NESTLÉ USA ([FOOD DIVE](#))

## Timeline: Important Events This Quarter

This snapshot highlights the biggest events that drove conversations and shaped reactions across the food industry. While these events frequently align with the Top Ten Topics, individual events don’t always fall neatly into categories.

Jan 14	Activist groups sue to stop implementation of the New Swine Inspection System at pork slaughterhouses
Jan 15	Trump signs “Phase One” of the trade agreement with China
Jan 17	USDA eases school lunch requirements from the Healthy, Hunger-Free Kids Act
Jan 28	PBS airs <i>The Poison Squad</i> documentary about pre-FDA food safety studies
Jan 30	Michelin Guide adds green clover symbol to highlight “sustainable dining”
Feb 17	Dairy Farmers of America proposes deal for Dean Foods assets
Feb 19	Coalition of 21 agriculture groups form Farmers for a Sustainable Future
Feb 20	USDA unveils plan to boost agriculture production by 40% and halve environmental footprint by 2050
Feb 28	Cargill launches plant-based patty and ground products
Mar 13	All three nations ratify the United States-Mexico-Canada Agreement (USMCA)
Mar 19	Department of Homeland Security declares food and agriculture “essential and critical” industries during coronavirus crisis
Mar 25	Senate confirms Mindy Brashears, PhD, as USDA under secretary for food safety
Mar 27	President Trump signs \$3 trillion stimulus package in response to coronavirus crisis

**About this report:** The Intel Distillery systematically captures, analyzes and reviews important food and beverage news, trends and policy issues, filtered through 1,500 of the most influential voices in the industry. Our quarterly reports serve as a bird’s-eye view of food production, capturing insights from every step in the food chain: from seed to feed, farm to fork, and regulations to media publications. The Top Ten Topics report is a snapshot of the topics most frequently discussed by industry leaders and provides insight into these leaders’ priorities.

**The full report, which includes recaps of influential conversations about each topic, is available upon request.**

The Intel Distillery also provides reporting and analysis on individual topics, such as labeling policies and the rising tide of alternative proteins, and can create customized reports for your needs. For more information about how The Intel Distillery can help you be more knowledgeable about the food and beverage business, visit [TheIntelDistillery.com](https://TheIntelDistillery.com) or contact [Nick Praznowski \(npraznowski@bader-rutter.com\)](mailto:npraznowski@bader-rutter.com).

# Coronavirus in 3 Charts:

## Food Industry Reactions

Our mission at The Intel Distillery is to offer a wide perspective of the entire food production continuum and to provide analysis to help our subscribers understand specific issues in a larger context. Our unique system of analysis tracks hard-hitting topics by conversation volume and ranks those issues, relative to each other.

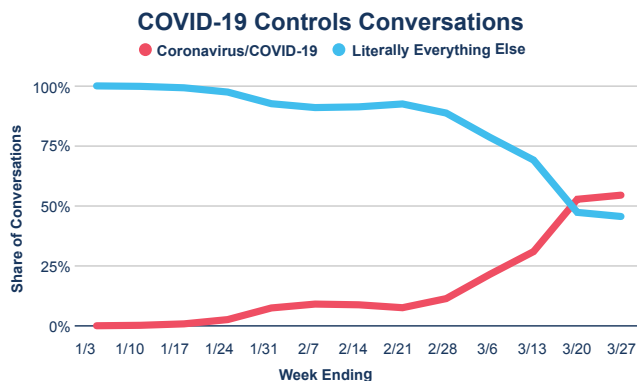
Over the past eight years, topics have ebbed and flowed as influential voices react to various forces guiding our industry.

Legislation, consumer demands, international dynamics, activist campaigns, corporate policies and health guidelines have all shaped conversations.

As the coronavirus spread throughout the world population in the first quarter of 2020, phrases like “unprecedented” and “now, more than ever” have never resonated with greater meaning. Definite parallels to these phrases exist in the food production world that The Intel Distillery tracks.

## Zero to 50% in 3 Months

By mid-March, discussions about the coronavirus dominated the food production conversation in all of the sources tracked by The Intel Distillery database.



Source: The Intel Distillery ©2020

This chart compares the volume of conversations about the coronavirus with “literally everything else” during the first quarter of 2020. Not unlike the steep exponential curve of the virus’ spread, food industry conversations about coronavirus took a similar tack.

1. Until mid-February, conversations focused on reports from China, with few hints of impacting the U.S. food supply.
2. By the beginning of March, as the situation became more urgent, media began reporting food hoarding and Americans getting sick.
3. Late in the quarter, the coronavirus accounted for the majority of conversations as retail demand surged, foodservice venues closed and workers fought for their jobs and their health.

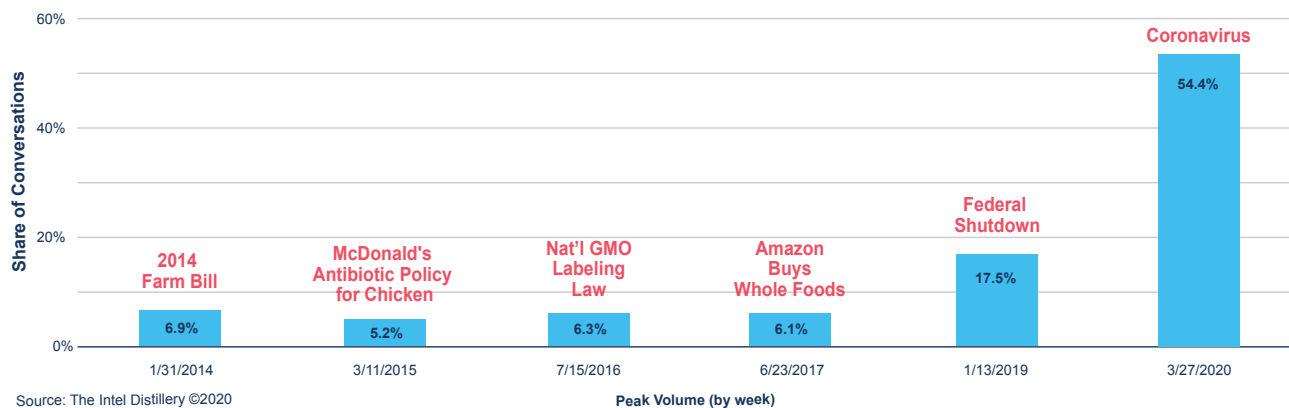
**THESE ARE UNPRECEDENTED TIMES WITH UNPRECEDENTED NEEDS, BUT IF WE CAN THINK IN TERMS OF PARTNERSHIPS AND PROBLEM SOLVING, WE CAN GET THROUGH THIS TOGETHER.**

— LESLIE SARASIN, PRESIDENT AND CEO  
FMI, THE FOOD INDUSTRY ASSOCIATION

## Peak Week Comparisons

As we looked back, no other event since 2012 even came close to controlling the same proportion of conversations as coronavirus. Often a big story will fire up one or two segments of the industry, but the current crisis hits every aspect of food production.

### Momentous Events in Food and Agriculture

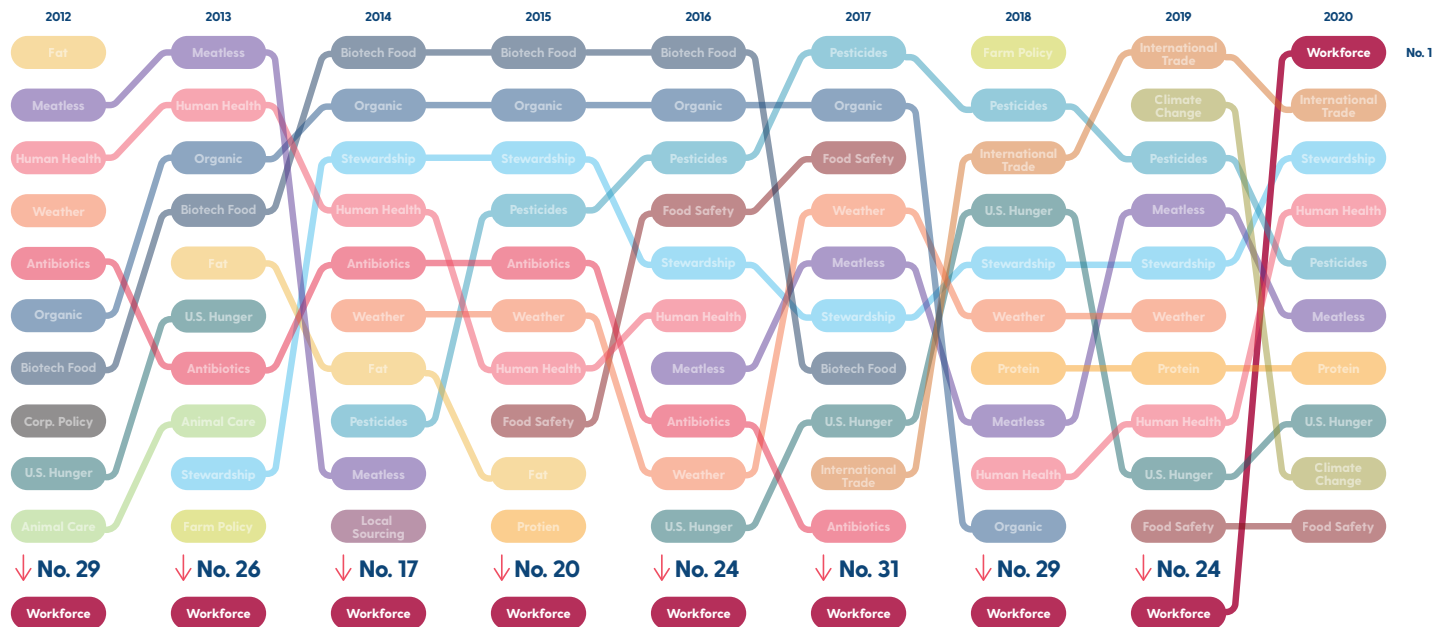


Source: The Intel Distillery ©2020

Since The Intel Distillery started tracking conversations by the most influential voices in food production, a few key events stand out as truly dominating the food production conversation. This graph compares influential conversation volume in their peak week. Until the coronavirus, the shutdown of the federal government in the beginning of 2019 had been the most commanding topic of conversation, with only about one-third of the volume of conversation.

## Market Driving Topics 2012-Present

Indeed, talk of the coronavirus has touched on many of the Top Ten Topics, including hunger, international trade and workers. But the bulk of this massive spike in discussion has focused on workforce issues. In the food industry, the pandemic's impact has hit hardest for frontline workers on farms, food production and at channels. Between rampant unemployment and massive shifts in supply chain needs, the food workforce faces health risks and an uncertain future.



In the context of ranking the Top Ten Topics from 2012 through the present, discussion about the workforce has consistently placed in the 20s (out of 40+ topics), with a previous high rank of 17. Despite being in the back half of the rankings, worker issues are a consistent factor in discussions of food and agriculture production. Back in November, we published the focus feature “[Workers in the Spotlight](#)” to highlight the critical role the workforce plays in every link in the food supply chain. Up to this point, the topic has been eclipsed regularly by more pressing or timely topics. This is not the case in light of the coronavirus crisis. This quarter, the workforce became the pressing topic and climbed a whopping 23 spots in our rankings.

IT IS CRITICAL THAT FOOD PRODUCERS AND FOOD WORKERS AT PROCESSING AND RETAIL LEVEL ARE PROTECTED TO MINIMISE THE SPREAD OF THE DISEASE.

— U.N. FOOD AND AGRICULTURE ORGANIZATION

PLEASE DESCRIBE ANY MEASURES THE CDC AND FDA HAVE TAKEN TO ADDRESS CORONAVIRUS-RELATED SAFETY CONCERNS FOR WORKERS IN THE RETAIL FOOD INDUSTRY. HOW DO THE CDC AND FDA PLAN TO IMPROVE AND PROMOTE THAT GUIDANCE?

— SEN. EDWARD J. MARKEY (D-MASS.)

## Looking Ahead

The impact of the coronavirus within food production is fluid and unpredictable, but it will have long-standing ramifications for employment, regulation and supply chain divisions between foodservice and retail. The Intel Distillery will continue to monitor this massive disruption from important perspectives across all sectors of the industry.

For more food and ag insights, visit [TheIntelDistillery.com](https://TheIntelDistillery.com).

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