



SUNDAY, APRIL 12

5:00 – 7:00 P.M. **First-Time Attendees Reception**, Sunstone Terrace

MONDAY, APRIL 13

8:30 - 11:30 A.M. **Registration**, Gemstone Gallery

11:00 A.M. – 6:00 P.M. **Greater Penguin Golf Tournament**, Legacy Golf Club

6:30 – 8:00 P.M. **Welcome Reception**, Skysill Rooftop Lounge

TUESDAY, APRIL 14

6:30 – 7:45 A.M. **Breakfast**, Sunstone Terrace

8:00 – 8:45 A.M. **Retailer Keynote**, Opal Ballroom
Tim Lowe, *President, Lowes Foods*

9:00 – 9:45 A.M. **Navigating Macroeconomic Trends:
Implications for Frozen & Refrigerated Foods**
Tom Bailey, *North America Head of Consumer Research, Rabobank*

As economic pressures reshape household budgets and health trends redefine eating habits, the frozen and refrigerated food industry faces both challenges and opportunities. This session will explore the evolving global landscape and what it means for temperature-controlled categories. We will delve into how affordability concerns influence purchasing decisions and the direction of consumer spending. Additionally, we will examine the impact of health and lifestyle factors, such as MAHA initiatives and the increasing influence of GLP-1 medications on eating habits. Our discussion will cover consumer preferences for both value and premium products, the continued rise of private labels, and the growing interest in less processed foods amidst ongoing attention to ultra-processed items.



TIM LOWE



TOM BAILEY

9:45 – 10:00 A.M. **Break**

10:00 – 10:45 A.M. **Optimizing Value with Today's Consumer**
Cara Loeys, *VP & Industry Advisor, CPG, Food & Beverage, Circana*

The food & beverage landscape is evolving faster than ever, driven by shifting shopper behaviors, economic pressures, and heightened expectations for personalization and value. This presentation explores shifting consumer needs and strategies to optimize value for today's consumer—balancing affordability, quality, and convenience.



CARA LOEYS

10:45 – 11:00 A.M. **Break**

11:00 – 11:45 A.M.

Retailer Spotlight: Q&A

Kristin Popp, *Executive VP, Woodman's Food Markets*



KRISTIN POPP

12:00 – 1:00 P.M.

Lunch, Sunstone Terrace

1:00 – 1:45 P.M.

The AI Advantage: How to Think, Work, and Create in a New Era

Joe Parrish, *Partner, The Variable*

Back with an update (version 2.0), Joe Parrish will help empower NFRA members to confidently navigate the new era of AI. Through practical education, the session will demonstrate how to use AI to work smarter, think more creatively, and make more informed decisions—ultimately driving greater impact for your businesses, customers, and the broader frozen and refrigerated foods industry.



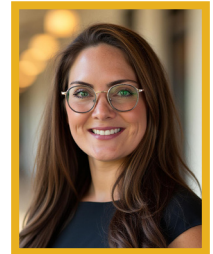
JOE PARRISH

1:45 – 2:30 P.M.

Optimizing Retail Media to Build Shopper Loyalty

Tiffany Williams, *Group VP, Sales, Inmar Intelligence*

As food retailers face shifting consumer behavior, rising costs, and margin pressures, alternative revenue models have become essential to sustaining long-term growth. Across the frozen and refrigerated aisles, new revenue pathways—including retail media, loyalty and data monetization, digital incentives, and emerging in-store media channels—are creating opportunities to drive incremental profit and grow shopper loyalty. This presentation will explore how retailers and brands are evaluating these opportunities, building internal alignment, and operationalizing programs that deliver measurable financial value and stronger shopper engagement. The session will spotlight both on-site and in-store activation, including merchandising, signage, digital shelf touchpoints, and full omnichannel integration. Attendees will gain practical insight into how diversified revenue streams can complement the core grocery business while improving relevance for today's shopper.



TIFFANY WILLIAMS

2:30 – 2:45 P.M.

Break

2:45 – 3:30 P.M.

Inside the Retail Channel: Macroeconomic Forces, Competitive Dynamics, and Consumer Retail Trends

Aubrey Jones, *Research Associate, Cleveland Research Company*

Michael Konrad, *Research Associate, Cleveland Research Company*

Cleveland Research Company provides a focused look at how the current economic and supply chain environment is shaping retail performance. This session highlights key macro drivers, shifting competitive dynamics across channels, evolving consumer behavior, and freight market trends to outline implications for suppliers going forward.



AUBREY JONES

3:45 – 5:00 P.M.

Membership Committee, Onyx Boardroom



MICHAEL KONRAD

3:45 – 5:00 P.M. Supply Chain Open Forum, Jade Room

Cold-chain leaders are under increasing pressure to provide excellent service while promoting sustainability and building genuine resilience. Based on real-world evidence from a year-long study led by Western Michigan University, this Supply Chain Forum session will focus on how infrastructure, operations, and planning must work together to meet these challenges effectively. Stage One explores coordinated, asset-based infrastructure planning, design, and operation. Stage Two demonstrates daily management amid imperfect demand signals and limited visibility. Together, these stages move beyond fragmented “best practices” to deliver an integrated, industry-tested framework that strengthens demand-supply alignment and elevates shopper service.


MARCEL ZONDAG
6:00 – 7:30 P.M. Tuesday Evening Reception, Sunstone Terrace

WEDNESDAY, APRIL 15
7:00 – 8:00 A.M. Breakfast, Opal Ballroom
8:00 – 8:45 A.M. Working Through the Research: An Insider’s Perspective
 Ashley Kim, *Research Manager, Morning Consult*

NFRA and Morning Consult spent the past year digging into how shoppers think about the frozen and dairy categories. Ashley Kim, Research Manager, will walk attendees through the clearest takeaways from that research — what drives purchases, what slows them down, and how trends like social media, weight-loss medications, and air fryers are reshaping habits. We’ll break down how consumers judge value, where they look for nutrition information, and what motivates them to try something new. You’ll leave with a sharper picture of today’s shopper, and the opportunities brands can act on right now.


**DR. ANEZKA
VISOVA-
ROBERTSON**
8:45 – 9:00 A.M. Break
**9:00 – 9:45 A.M. Food Waste as a Business Imperative:
NFRA’s Report and Roadmap for Cold-Chain Leadership**
 Eva Goulbourne, *Founder, Littlefoot Ventures*

Food waste is a significant financial and operational risk for the U.S. food industry, with 30 - 40% of the food supply going uneaten. For consumers, this amounts to roughly \$800 in wasted food per person each year; for retailers, it represents an estimated \$28 billion in lost product value, labor, disposal costs, and missed sales. Rising inflation, fuel prices, and supply-chain pressures further squeeze margins and strain ESG commitments across the sector.


ASHLEY KIM

EVA GOULBOURNE

NFRA is spotlighting its new Insights Report on food-waste reduction opportunities in the cold-chain, released late last year. The report provides category-level insights, industry and consumer trends, peer case studies, consumer-engagement tools, and outlines actionable strategies that will deliver real business value for NFRA members. Eva Goulbourne will present the report's findings, highlighting the highest-leverage opportunities and practical pathways to implementation. Attendees will leave with clear next steps on how cold-chain companies can drive measurable improvements to their bottom line, all while supporting consumers and contributing to a more sustainable food system.

10:00 A.M. - 12:00 P.M. Consumer Activation Taskforce (Invitation Only), Topaz Room

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