

P.28 TAX CUTS FILL
PROCESSORS' POCKETS

P.43 AMAZON RATTLES
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P.82 GRASS-FED
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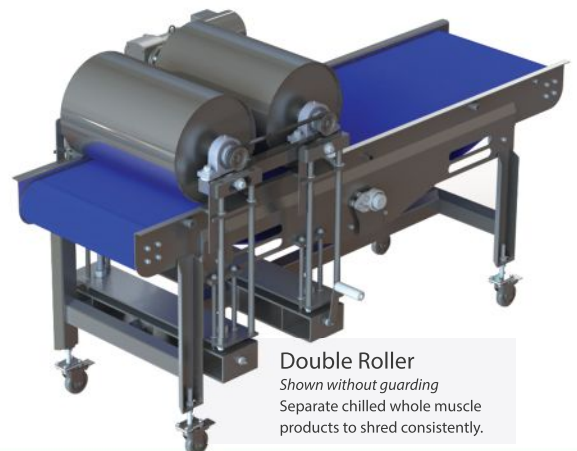
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Lisa M. Keefe
Lisa M. Keefe, editor

MAXIM-al

I know a fair number of folks

who absolutely cannot stand aphorisms. Complicated truths cannot be boiled down into a few words or a phrase that accurately conveys the idea, they argue. The many, many examples of companies and executives who try to do just that, with their inspirational posters on the wall and team-building chants, only proves the point.

I, on the other hand, am drawn to them. Not the seagull-flying-against-the-setting-sun posters — no. But I love the way big ideas can be boiled down to their essential truths. I usually find them thought-provoking and creativity-spurring.

These quotes pop up over the course of a day, usually in the Food Marketing Institute's *DailyLead* newsletter, or on Forbes.com. I save them, the way my grandmother clipped articles about the grandkids from the local newspaper.

I rifled through some of my saved quotes the other day, looking for inspiration. On this day, the maxims that resonated with me coalesced around a single concept:

"Ideas are important, but they're not essential. What's essential and important is the execution of the idea." — John Landis, film director

"All organizations are perfectly designed to get the results they are now getting. If we want different results, we must change the way we do things." — Tom Northrup, leadership consultant.

"What you have to do and the way you have to do it is incredibly simple. Whether you are willing to do it, that's another matter." — Peter Drucker, consultant

I attend a lot of industry meetings in which thought-provoking ideas and creative approaches to social and communications challenges are the order of the day. In presentations and conversations, from breakfast into the evening, smart

people from all disciplines share ideas for telling meat's story. It has been the case since I began covering the industry 10 years ago.

So why does the meat industry grapple with substantially the same issues that plagued it 10 years ago — or 20?

The answer is as complicated as the question. Social media distorts the news; food knowledge is disappearing along with consumers' ability to judge good advice from bad; time is at a premium but the technologies that save time are suspect.

Too often, great (if imperfect) ideas get stuck in the muck. Lack of financing puts it on the back burner. Time passes and other matters become more urgent.

I get it. I do. One of the best parts of my job is working for a company that likes pushing the boundaries of top-quality journalism for the industries we (*Meatingplace* and our three sister publications) cover. We talk every day about how the publishing business is changing and the opportunities that presents. We outline fantastic programs that will knock our audiences' socks off.

And yet, projects have to wait — until the technology is in place, until room can be made in the budget, until there's time. Enthusiasm can flag pretty quickly when it runs up against reality.

One of my goals for *Meatingplace*, and for me personally, is not to let these ideas lose momentum. We have epic ideas for *Meatingplace* and our community, and if some are destined to wilt under closer scrutiny, others need only to be executed.

What about your plans, the conversations and maybe-solutions you've dreamt up? What muck are they stuck in? What are you doing about it?

"You are not defeated when you lose. You are defeated when you quit." — Paulo Coelho, Brazilian writer, lyricist

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IS NOT TO LET THESE IDEAS FALL AWAY DUE SIMPLY TO LOSS OF MOMENTUM.

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MEAT TECH: TENDERIZATION

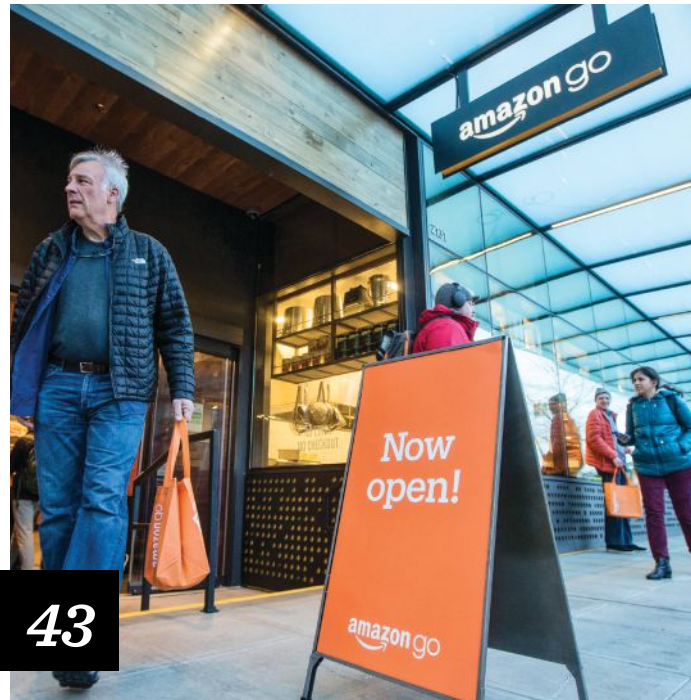
In this month's Meat Tech, we provide processors with some technological tips and cost-effective best practice approaches to enhancing product tenderness.



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+ ARTICLES

on **BEST PRACTICES,**
PROCESSING TECHNOLOGY
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Great quotes from great people can spur us to do more in the future than we have in the past.

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BEST PRACTICES LOOKING AHEAD: MEETING THE GROWING GLOBAL DEMAND FOR POULTRY MEAT

A look at the economic growth forecast for beef, poultry and pork markets worldwide, and which countries are poised to meet production demand.

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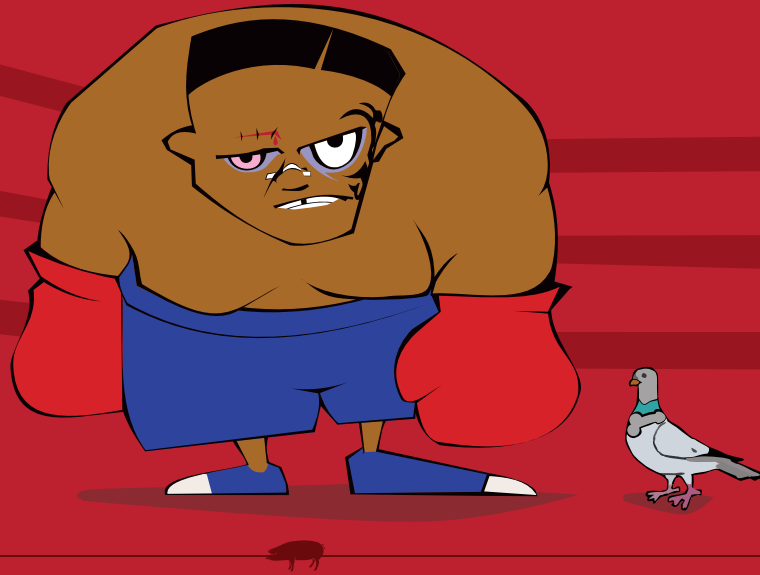
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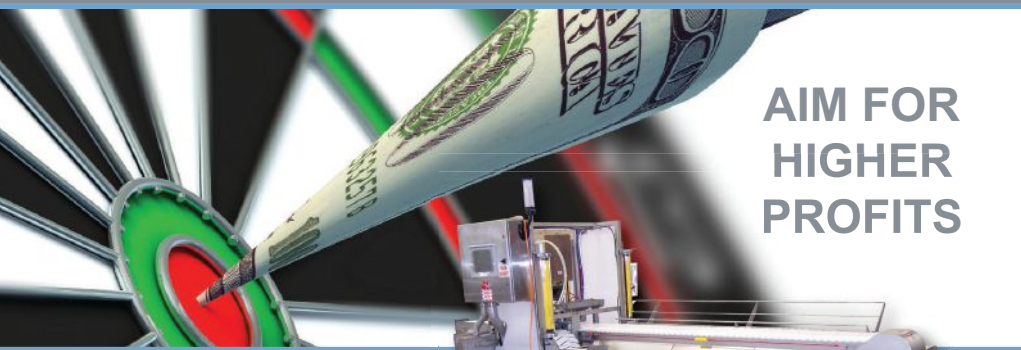


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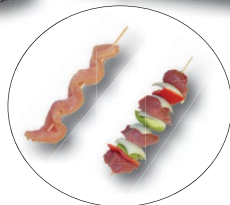




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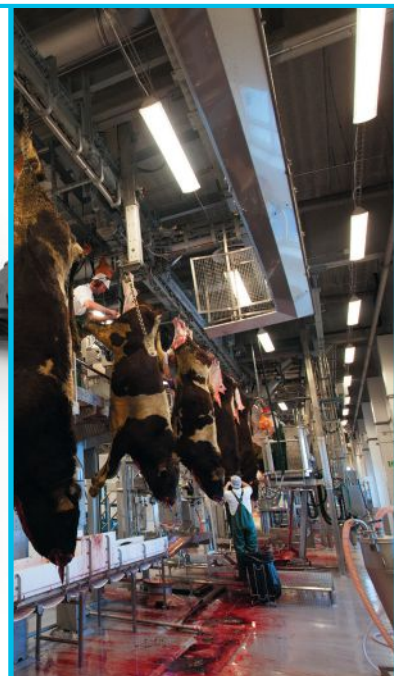
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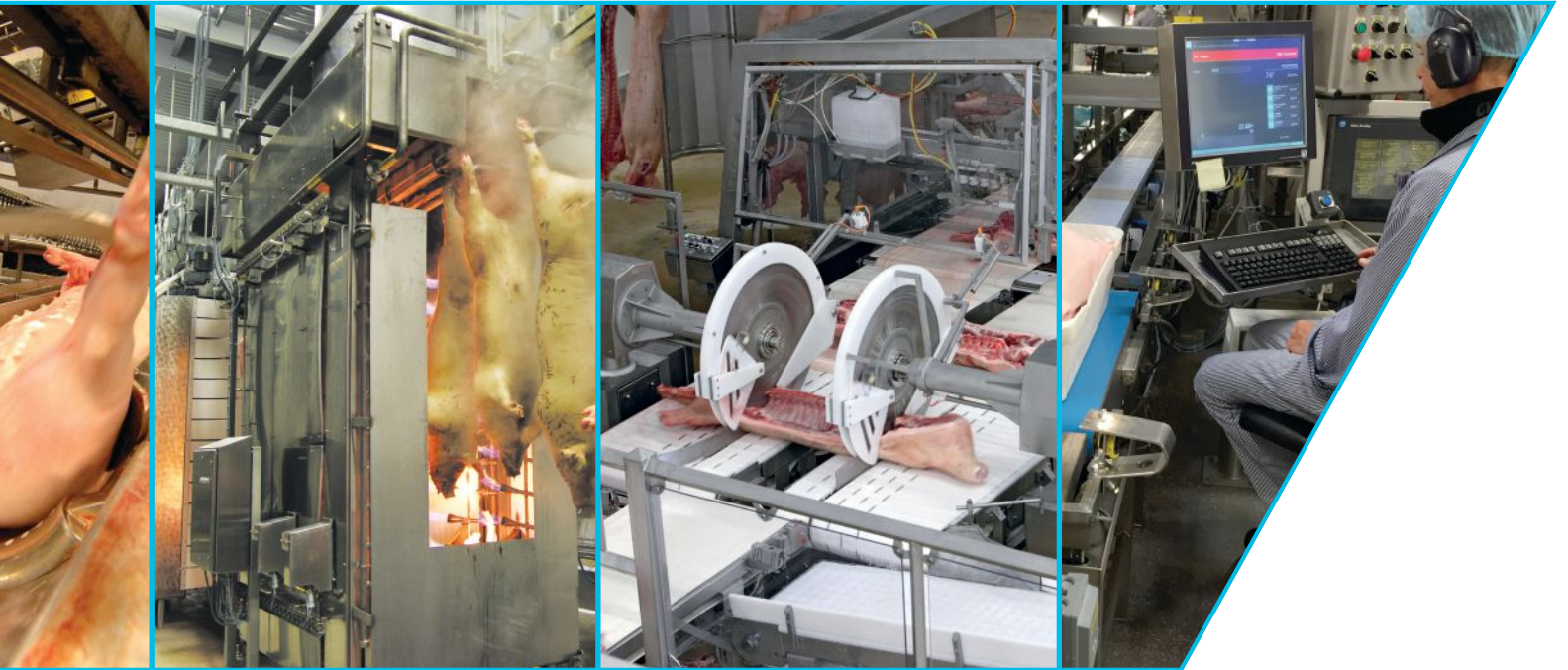
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FIRST CUT



WAKE-UP *call*

The world's largest-ever outbreak of listeriosis in South Africa is a reminder to processors worldwide that they need to remain vigilant in fighting this pathogen.

In March, the World Health Organization named the South African listeriosis outbreak the world's largest ever recorded. It's also one of the deadliest.

According to South Africa's National Institute of Communicable Disease (NICD), of the 948 laboratory-confirmed cases of listeriosis, 180 have died since January. That's 27 percent of all patients infected with the outbreak strain *Listeria monocytogenes* ST6.

South African health minister Aaron Motsoaledi announced in a statement March 4 that the source of the outbreak was linked to a nation-

ally popular ready-to-eat (RTE) meat product called polony, a cold meat roll. Two companies, Tiger Brands and Rainbow Chicken Limited (RCL), are being investigated, Moto-soaledi said, confirming that the outbreak strain was traced to products produced at a Polokwane, South Africa, processing plant operated by Enterprise, a subsidiary of Tiger Brands. More than 16 environmental samples from the Enterprise facility tested positive for the strain.

Tiger Brands responded by recalling all of its Enterprise RTE meat products and suspending

DELIVERY RUN

A DAY* AT A TIME

Nov. 20, 2017:

Door to Door Organics announces it **CEASED OPERATIONS** after 20 years of business. The Bucks Country, Pa., grocery delivery service said lack of funding prospects gave it no path forward.

*As reported on...

Nov. 30, 2017:

Albertsons Cos. says it will offer **FASTER SAME-DAY GROCERY DELIVERY – IN AS LITTLE AS AN HOUR –** through an agreement with the “on-demand” delivery service Instacart.

Dec. 13, 2017:

TARGET CORP. announced on Wednesday it has agreed to **ACQUIRE ONLINE SAME-DAY DELIVERY PLATFORM** Shipt Inc. for \$550 million in cash, in a deal that accelerates the retailer's digital fulfillment efforts.

Feb. 6:

TYSON FOODS INC. INVESTS IN TOVALA, a Chicago-based food startup that makes “smart” countertop steam ovens with fresh ready-to-cook meals. Tovala, founded in 2015, combines an internet-connected steam oven and a meal delivery service.

plant operations. The company noted that it had ramped up listeria testing but not confirmed the presence of the ST6 strain in its tests as of early March. Poultry processor RCL Foods shut down production at its Wolwehoek, South Africa, facility, although the company stated that the outbreak strain was not officially traced to that plant. However, RCL issued a recall for its line of Rainbow polony products.

Motsoaledi also advised members of the public to avoid all processed meat products that are sold as ready-to-eat. "While we know that polony is definitely implicated, there is a risk of cross-contamination of other ready-to-eat processed meat products, either at production, distribution or retail," he said.

Although this outbreak is occurring half a world away, says food safety expert John Butts, it should be a warning all to U.S. meat and poultry plants to bring their A-games to their own listeria prevention control programs.

"*Listeria monocytogenes* has caused more change to the meat processing industry in the U.S. than anything I've ever seen in the past 35 years," said Butts, vice president, research with Land O'Frost and president, FoodSafetyByDesign. "This outbreak demonstrates why we have to take this organism more seriously on a worldwide basis. Its persistence and virulence make it a consistent food safety threat. Processing plants must become microbiologically clean and have harbor-age sites removed."

WHAT I KNOW NOW



Growing up on a farm in central Illinois and having a family history of public service in local politics has added up for Scott Shearer, to a passion for shaping policy around agriculture. The former Illinois Secretary of State and U.S. Deputy

Assistant Secretary of Agriculture fights particularly hard to facilitate U.S. agricultural trade in Washington, D.C. with government consulting firm Bockorny Group.

The first job that I got paid for was when I was in high school. I worked for a neighbor of ours that needed help that year on his farm. ... You work hard, you put in the extra effort, and if you do more than is expected from you, you will be recognized and rewarded.

There are decisions in Washington that are going to affect a business, a community or an industry's bottom line every day. If you're not there to represent yourself, and no one is going to do it for you, the decision will still be made. You don't win every time, but at least you get to state your case and, more times than not, it does make a difference.

Grandkids just want your time. They may just know you have a job. What you do they don't know or care that much about. 'Ok, you go and you have meetings with congressmen — big deal.' They just want to spend time with you.

Work hard, your word is your bond, and don't forget where you came from. As long as I've stuck to those three things, it's been helpful.



TRUE OR FALSE



We asked readers in an online survey if the following statement is true or false: "A recent online survey showed that respondents who identify as vegan are more likely to try lab-grown (cultured) meat than other consumer segments, including meat eaters." For the answer and results, turn to p. 100.



Feb. 8:

Amazon said it is introducing **TWO-HOUR DELIVERY OF WHOLE FOODS MARKET GROCERIES THROUGH PRIME NOW** in four markets, with plans to expand across the United States this year.

Feb. 15:

YUM BRANDS SAID IT ENTERED INTO AN AGREEMENT WITH GRUBHUB to buy \$200 million in shares of the online and mobile food-ordering company, and the two will partner to drive more orders to KFC and Taco Bell restaurants.

Feb. 16:

Texas supermarket company **H-E-B HAS BOUGHT FAVOR DELIVERY**, an on-demand delivery service based in Austin.

Feb. 28:

Sam's Club, a division of Walmart, and Instacart **ANNOUNCED SAME-DAY DELIVERY OF GROCERIES** to households in several markets across the United States.



FIRST *cut*

IRELAND *goes* GREEN (ER)



The Irish beef industry is taking aim at U.S. consumers with a targeted marketing campaign.

Citing the success of Kerrygold dairy products in the U.S. as one of its inspirations, the Irish beef industry launched a new promotional campaign at the Annual Meat Conference in Nashville in February.

While they acknowledge that marketing Irish beef is different from marketing the country's cheese or famous whiskey, Michael Creed, Ireland's Minister for Agriculture, Food and the Marine, and Tara McCarthy, chief executive of Bord Bia (Irish Food Board), say they have been working for the last two years to build awareness and credibility

behind the product. Ireland, they point out, is the world's fifth-largest exporter of foodstuffs.

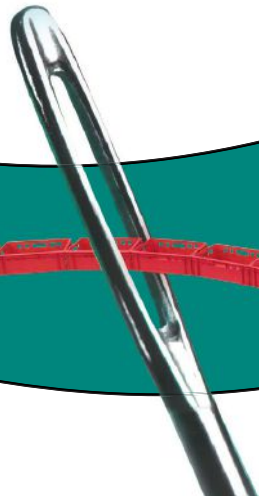
Ireland's famous emerald-green grass is the key ingredient in the country's grass-fed and -finished beef. This feed renders Irish beef "more tender and more flavorful" than other grass-finished products, McCarthy says. And they have the studies to prove it, conducted by the University of North Carolina.

Ireland's system of keeping its cattle outside 245 days a year, on average, and eschewing hormones helps the product hit more American consumers' hot buttons. Further, Ireland's

national efforts to make its ag industries more "sustainable" are backed by the country's government via its Origin Green program. Sustainability claims are "independently audited every step of the way," Creed says.

Although Irish beef has made "modest" inroads to the U.S. market thus far, six companies representing about 80 percent of the country's beef production have been accredited for export to the U.S. by USDA and are on board for marketing and promotional campaign.

"We're here for the long term," McCarthy says.



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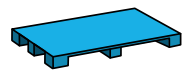
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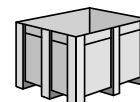
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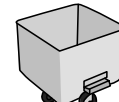
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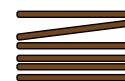
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GOOD PUB

Here's some good news: A report that evaluates corporate commitments to animal welfare, compiled annually by two animal welfare groups, showed that 88 percent of U.S. companies have now made formal policy commitments on farm animal welfare, up from 76 percent in 2016. The report ranks Perdue Farms, JBS and Cargill among global meat processors that have made the issue integral to their business strategies. Media coverage was good across nearly a dozen business publications (including Meatingplace), but an online search did not turn up headlines in the U.S. mainstream media.



BARNYARD PUB

RECAPPING
HOW THE MEAT
INDUSTRY AND
ITS PLAYERS
HAVE FARED IN
THE MAINSTREAM
MEDIA

BAD PUB

Here's some bad news: When Sysco and US Foods became the latest entities to sue major poultry producers over allegations of price fixing, media coverage was a veritable "who's who" including: Washington Post, Wall Street Journal, Forbes, CNN Money, Toronto Star and NPR, among others. Headlines included: "The Price Fixing Scandal Rocking Big Chicken" and "Tyson, Pilgrim's Pride jacked up chicken prices, say lawsuits." Some publications did, however, take a more even hand, including Forbes, which published an economist's opinion that, "This issue, which has previously seen food processors and supermarket chains make similar claims, still seems short on proof of malicious action."



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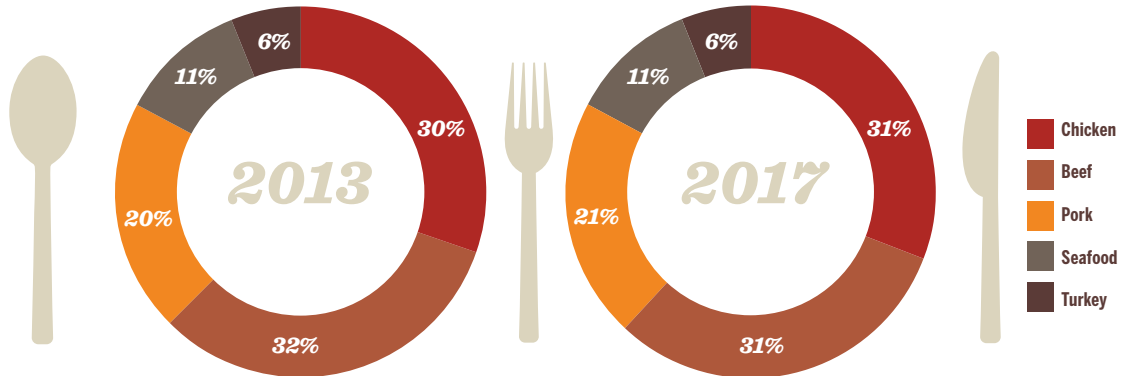
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Proportion of various animal-based proteins consumed at foodservice (restaurants and institutions), 2013 and 2017



Source: Technomic Inc.

Note: "veal" and "other" each were less than 1 percent; numbers may not add to 100 percent due to rounding



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ASK the EDITOR

“WHAT IS CAUSING THE RISE IN GRASS-FED MEATS?”

— MACK GRAVES, LATIGO MANAGEMENT & MARKETING CONSULTANTS

In my opinion, it is the story – and the optics. Grass-fed beef conjures up (and is often marketed as) happy cattle living in their natural environment. Most consumers I talk to do not understand that traditionally raised, grain-fed cattle also spend a good portion of their lives grazing and are only finished in feedlots. Before I started covering this industry, I didn't know that either. There is also a health aspect of the story with grass-fed beef; it's often leaner with higher levels of Omega-3 fatty acids. As consumers look for healthier foods with happier images, grass-fed beef has a good story to tell. Now, the debate over which is more sustainably raised is another story and that answer depends on whom you talk to. — Rita Jane Gabbett, executive editor

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KINGSFORD *on fire*

The well-known maker of charcoal briquettes offers a line of branded BBQ foods; consumers loved its Pork Carnitas, even if most seemed to confuse the product with BBQ pulled pork.



THE PRODUCT:

Kingsford Seasoned Pork Carnitas are refrigerated, fully cooked, "minimally processed," contain no artificial ingredients, and are gluten-free.

THE PRICE:

\$6.99 per pound

THE PLUS:

Consumers in the know on pork carnitas **raved about the quality and texture** of Kingsford's product.

THE PROBLEM:

Consumers **apparently not so in the know mistook the product for pulled pork** and thought it might need some extra barbecue sauce for more flavor.

DEMOGRAPHICS

Kingsford, the company many are familiar with for our grilling and charcoal needs, recently entered the food sector through a collaboration with Rupari Foods (now owned by deli meat specialist Carl Bud-dig). The company is offering a number of products ranging from BBQ sauces and dry rubs to pre-cooked ribs and barbecue meats. We opted to taste the Kingsford Seasoned Pork Carnitas, which are refrigerated, fully cooked, and available in a 1-lb. tray that is also used for cooking. "Minimally processed" and containing no artificial ingredients, the carnitas are gluten-free and tout

an impressively short and clean ingredient listing. Tasters ranged in age from 20 to 70 and included singles, families and friends at a variety of eating occasions including lunch, dinner and even casual get-togethers.

FIRST IMPRESSIONS

"The first thing I saw was the huge Kingsford logo and I thought charcoal and lighter fluid! But the picture of the meat looked really good. It's a bright and vibrant package," noted a 49-year-old female. Our 20-year-old female added, "The picture looks really good and the package itself is really attractive."

A 60+ male commented, "When I first saw the package and

saw the brand name Kingsford, I said, 'No way ... Kingsford does charcoal briquettes. That really attracted me to the product line and then I said, 'this could be very interesting.'"

A 34-year-old male noted, "The image on the front looked good, and it used words I look for when shopping like 'all natural,' and 'real ingredients.'"

PREPARATION

Our 23-year-old male who prepared the pork carnitas for a few of his friends noted, "I made it according to the stovetop directions on the package and it was super easy to cook and it pulled apart easily, just like pulled pork." A 50-year-old mom who was preparing the pork

carnitas for a party at her house explained, "I baked it in the oven and cooked it right in the black tray."

Then one of her 25-year-old party attendees added, "I pulled it apart with two forks right in the tray and it was really easy. It looked like a solid piece of meat when it came out and it had a lot of juice on the bottom."

A 47-year-old female indicated, "It took longer than 12 minutes in the oven to get to 165°. The small print says 165°, the main directions just say 'till hot and the surface of meat has browned.' But the meat looked weird before shredding. It looked like a tongue or something." Then she noticed, "I failed to put

the tray on a baking sheet. The small print says not to put it directly on rack. Why not? If it's oven-safe it should go directly on the rack. Maybe the baking sheet transfers more heat too and that's why mine wasn't done in 12 minutes?"

Another mom who prepared the carnitas for a small get-together asked, "Why do the microwave directions say 'approximately 5 minutes'? What's the caveat? What am I looking for? It looks like a massive chunk of meat, but it shreds beautifully."

Our 49-year-old mom said, "When I removed the meat from the oven it didn't look appetizing. It had a gray tint, but as soon I started shredding the meat it had the beautiful color of both light and dark meat pork. The meat was tender and juicy and it shredded perfectly, like pork I would cook at home in my crockpot."

TASTE AND APPEARANCE

"I liked the texture, but I wasn't crazy about the taste," said a 34-year-old male. "Not that it was bad, but it was very flat."

One of our participants who frequently makes her own pulled pork pointed out, "The meat had real meat texture. It didn't feel bouncy and 'pumped up' like many prepared meat items do. The meat is really juicy and flavorful."

"This pork tasted slightly different than my pork carnitas, but it tasted just like the pork from the Cuban restaurant by my house," said our 49-year-old female.

At the party house, our 20+-year-old guys commented, "It was as if you slow-cooked it for hours." Another said, "It did have a lot of flavor on its own, but I wanted more sauce with it." Yet another thought, "It was so tender, it fell apart, it had good flavor and it would go good with a BBQ sauce."

“IT REALLY HAS A VERY AUTHENTIC pork carnitas flavor.”

Our 23-year-old who prepared the carnitas for his friends remarked, "The texture of the meat was awesome, but the meat was very plain. I wanted to smother it with BBQ sauce."

Our 20-year-old hesitantly said, "I feel like it should have a sauce — like a BBQ sauce. It's thin. I can't explain that flavor." Her mom added, "I would serve it right from the black container. It needs something. It doesn't taste like what I would make. Mine would have more of a 'sauce.'" Her sister who was tasting with them commented, "It really has a very authentic pork carnitas flavor."

They then served the carnitas over tortilla chips, sprinkled with shredded cheddar cheese and microwaved a few seconds and it was a totally different experience.

"We all loved it. It balanced everything out and made for some really hearty nachos that had 'real' meat on them — not like the stuff you get in many casual restaurants. We finished it up that way!" she exclaimed.

Another couple who prepared the product noted, "The product was excellent! The quality of the meat was good as it wasn't fatty or gristly at all. The flavor was good; good seasoning, good smoke notes — and not overly salty. My only point of disagreement was that I thought the meat was a bit 'wet' and it had too much liquid."

One taster commented, "Even left-over it didn't get the warmed-over flavor that is common with meat. I had it once as tacos again, and another time as a meat filling in quesadillas."

UPSHOT

Kingsford has done a superb job with its simple packaging, oven-/microwave-ready tray, great value, and outstanding texture and quality of the pork. In fact, we have never heard such unanimous positive comments on meat texture from a 'prepared' product. But it seems obvious to us that those who were content with the seasoning in these pork carnitas *knew* what pork carnitas were and were evaluating this product as such. Many of the others seem to have evaluated this product as, or in comparison to, pulled pork. It should be noted that Kingsford also has a Pulled Pork with Sweet & Smoky Kansas City Style BBQ Sauce in its line. Perhaps we should try that next with this group of tasters and make everyone happy.

by **Jacqueline Beckley and Anna Marie Cesario, the Understanding and Insight Group**

Food product development and consumer research veterans Jacqueline Beckley and Anna Marie Cesario, join Meatingplace Magazine as regular contributors to MeatingTaste, a consumer sampling of new products featured in our monthly Taste Test column. Here's how the program works: The meat item is distributed to consumers, including the core demographic, for preparation in their own houses. No instructions are provided to the consumer, other than to write their overall impressions of the product, as well as to evaluate the flavor, texture, packaging and ease of use. Beckley and Cesario look for common threads by using Getting It!, a system developed to listen to consumers about products (Getting It!®). The sample of people is not intended to be a "taste test" in a controlled setting, nor is it intended to simulate a focus group. Others are doing both. Rather, the intent is to interpret the response of the people who might purchase a product like this and use it, simply based on their encounters with the product in their individual, unique home environment. That is how U&I has been developing cutting-edge product and people understanding since 1999.

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The Story We Tell

Innovative solutions further the meat industry's move toward greater transparency

Opinions may differ about exactly where and when the journey toward a “transparent” food industry began, but many food manufacturers would agree that the trip has felt like a long one. Some would trace it all the way back to the publication of Upton Sinclair’s “The Jungle” in 1906—perhaps the impetus for what eventually became the ever-evolving sustainability movement, which in turn fed consumer thoughtfulness, curiosity and concern about the foods they eat.

Initially recognized by food marketers as a consumer trend, the “clean-label” movement is—at this point—clearly not a trend, more likely representing an evolutionary shift in consumer awareness that may never turn back.

“Processors are more aware than ever of what many consumers care about and what they understand regarding regulations, ingredients and practices in the industry.”

- David Charest

Regardless of the movement’s origins, the meat industry—which has arguably grappled with the most passionate skeptics and dissenters in the overall food debate—has taken pains in recent years to remove barriers to the consumer’s view of meat processing, revealing a more secure, humane and sophisticated approach than many from outside the industry expected to see.

Opening a window

Long-time proponents of industry transparency, such as Dr. Temple Grandin and the North American Meat Institute, have given millions a window into the processing world using online video. These presentations have helped to demystify the processing plant and debunk many anti-meat myths. Cargill’s efforts to invite the world to look inside its beef processing business began even before the famous 2011 Oprah segment, which was shot in the company’s facility in Fort Morgan, Colo. All recognized that the industry had a positive story to tell and took the initiative to tell it.

“The meat industry has learned a lot about how best to tell its own story,” says David Charest, Vice President-Meat Industry at Corbion. “Processors are more aware than ever of what many consumers care about and what they understand regarding regulations, ingredients and practices in the industry. They’ve come to grips with the fact that perceptions often win out over reality, even when it comes to food safety and quality.”

The ingredients of the story

Charest says his company, as an ingredient supplier to leading food manufacturers, has followed that lead, developing solutions for meat processors that address consumer concerns while delivering the effectiveness that is critical in plant operations and throughout the food value chain.

“Corbion’s response to the move toward transparency has been to develop sustainable solutions that take nothing away from manufacturers while taking into account consumer perceptions and priorities,” Charest explains. “In fact, giving processors the functionality they need in a way that’s comfortable for consumers just gives the industry an even stronger story to tell.”

“Even in the case of non-labeled processing aids processors are realizing that it’s all part of their overarching story,” he adds. “They’re considering whether their food safety intervention methods can be explained simply so the general public can understand.”

The company’s lactic acid-based solution for surface decontamination and harvest intervention, PURAC® FCC Lactic Acid, is a good example. Lactic acid is naturally present in meat (as well as in the human body), and Corbion produces its product through a natural culturing or fermentation process using natural sugars from cane, beet, corn and cassava as feedstocks. This transparency-friendly solution sacrifices nothing in terms of reducing pathogens and spoilage bacteria on carcasses and fresh meat.

In a study at Oklahoma State University, Corbion’s Lactic Acid product outperformed a number of commercial intervention

“They’re considering whether their food safety intervention methods can be explained simply so the general public can understand.”

- David Charest

products—including a buffered sulphuric acid and peracetic acid (PAA)—in reducing *E. coli* 0157:H7 counts on beef carcasses. Another study at Texas Tech University showed that a 3% solution of Lactic Acid resulted in a 99.93% reduction in *Salmonella* on beef carcass samples in 24 hours.

The label as a storyteller

Manufacturers declare their position on consumer perceptions every day via the ingredient labels on their products. For many content-focused food shoppers today, the longer and harder to comprehend the ingredient list is, the stronger their impression that the maker doesn’t place high value on their desires and preferences.

This truth is what drives the development of ingredient solutions that can effectively replace synthetic solutions on which the food industry, including meat processors, has traditionally depended.

According to Charest, the Corbion portfolio includes many “clean-label” solutions based on naturally derived ingredients used for preservation, shelf-life extension, flavoring, acidification and fortification. In addition to lactic acid, other ingredients in the portfolio can be declared as “cultured sugar,” “cultured dextrose” or “vinegar.”

“That’s the language consumers speak and understand,” he says. “It tells a story that lets more people feel secure about the food they eat, and it’s part of a larger story that has the potential to change minds about a company and even the industry.”

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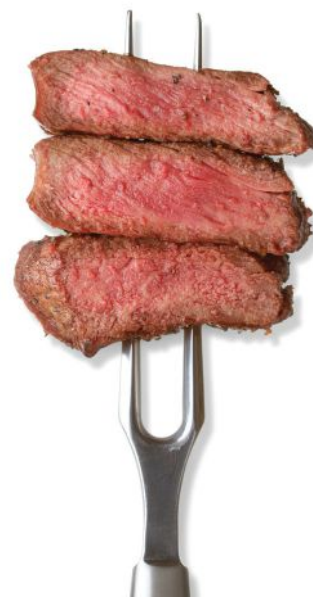




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LET *it flow*

The new tax law is putting millions back in the coffers of processors. Here's what some companies are doing with the money.

by John N. Frank, contributing editor



Photos by Getty Images

Meat and poultry processors received a Christmas gift last year that will keep on giving – the new federal tax law which cut the top corporate tax rate to 21 percent from 35 percent. Publicly traded processors’ quarterly results released in February showed a collective savings of roughly half a billion dollars in federal tax payments this year by the companies reporting (*table, p. 33*).

The biggest winners: “The firms

that get the largest share of their sales from the U.S.,” says Zain Akbari, an analyst who follows the food industry for Chicago-based Morningstar Research Services LLC. Sanderson Farms Inc. gets about 85 percent to 95 percent of its sales from domestic customers, Tyson Foods Inc.’s domestic sales have been in the high-80-percent range recently and Hormel Foods Corp. has been in the mid-90s, he estimates.



More on tax reform benefits, visit meatm.ag/tax-bonus

theISSUES

Farther up the food supply chain, cattlemen and poultry farmers could see significant tax savings as well, depending on how they have structured the corporate entities under which they do business.

Expect companies to use their tax windfalls to increase plant efficiencies, expand production capacity, raise some wages to attract workers in a tight labor market, increase marketing for lagging brands — and to shop for acquisitions that bring higher-margin products into their portfolios, industry analysts predict.

“I think it is fair to say that firms will allocate savings in a number of buckets rather than just allow them to drop to earnings in their entirety,” Akbari says.

All of that should be happening



President Donald Trump signed tax reform legislation into law on Dec. 22, 2017, cutting the corporate tax to 21 percent from 35 percent.

against a backdrop of rising consumer demand for proteins brought on by the tax savings some consumers will realize.

“Most food processing companies, including those in the meat industry, should benefit pretty significantly from these tax law changes,” says Akash Sehgal, a tax partner with the Los Angeles

accounting firm Green Hasson Janks. For those processors on fiscal rather than calendar years, the savings will be spread out over two fiscal years, he adds.

BY THE NUMBERS

Tyson Foods has reported the largest gain, a \$300 million tax savings. It



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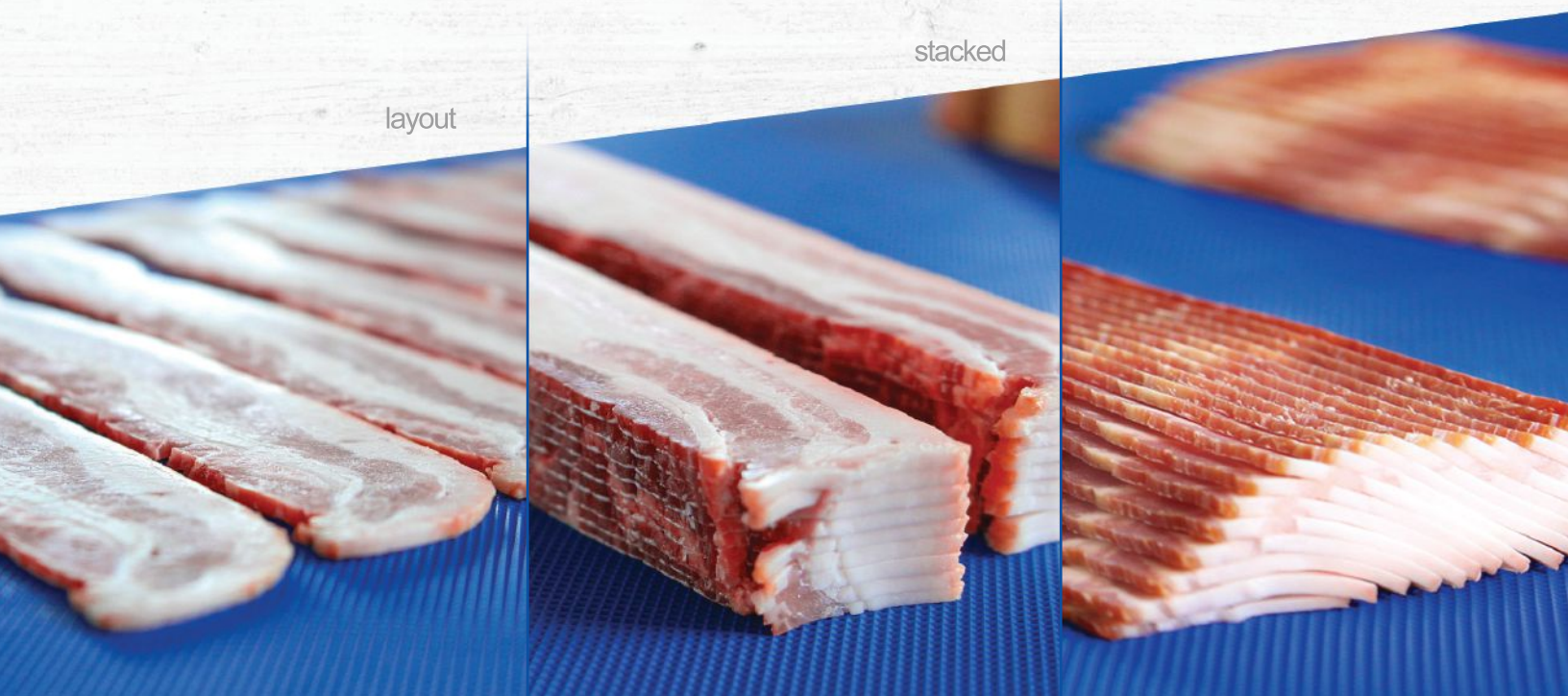
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expects an adjusted effective tax rate of about 24 percent in 2018 compared with a rate of 34 percent last year. The company increased its fiscal 2018 earnings forecast to between \$6.55 and \$6.70 a share from an older estimate of between \$5.70 and \$5.85. Roughly 21 cents per share of the new estimate was attributed to tax savings.

In a letter to employees announcing planned employee bonuses, Tom Hayes, Tyson's president and CEO, went on to hint at what Tyson would do with its tax savings, writing that the company will "focus funds on innovation and other initiatives such as enhancing the training, education and development opportunities that all team members receive." In addition, it will "accelerate capital projects that strengthen our operations and plant communities around the U.S. As part of this investment, we will move faster on sustainability and animal well-being initiatives, shrink our environmental footprint, protect the animals in our care and give the world's growing population greater access to sustainable food."

Hormel Foods reported a tax benefit of \$63 million, or 12 cents a share, in its first

fiscal quarter and said it expects to see about \$110 million to \$140 million in additional cash flow in fiscal 2018 because of its new lower tax rate. Its rate dropped to an expected range of 17.5 to 20.5 percent in its fiscal 2018 from a range of 32.3 to 33.3 percent in its fiscal 2017.

"Investments in the business will begin in the second quarter," Hormel's Jim Sheehan, senior vice president and chief financial officer, said in a February earnings call with analysts. "We will provide additional support to advertising and promotional activities. In 2018, we expect to increase advertising expenses in excess of 20 percent above last year. The company will invest additional capital into projects focused on plant automation, technologies and value-added capacity."

Jim Snee, Hormel's chairman, president and CEO, expanded on plans for the company's tax savings, saying, "we'd say that about half of that could be allocated to the headwinds at Jennie-O Turkey Store and freight."

The company's Jennie-O brand saw sales and margins fall in the most recent quarter reported. "We project a slower-than-expected recovery at Jennie-O



Meat processors are expected to use some of their tax windfalls to purchase new plant equipment.

Turkey Store as we continue to work through a difficult operating environment in the turkey industry," Snee said.

"We are making some investments this year that we would not have otherwise made. And so, [the new tax law is] giving us an opportunity to do that," he added.

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Kraft Heinz reported that its tax rate for 2018 should be roughly 23 percent compared with 28.6 percent in 2017 as a result of the new tax law. It did not specify its expected tax savings.

Pilgrim's Pride realized a \$41.5 million provisional tax benefit thanks to the lowering of the top federal corporate tax rate while Sanderson Farms estimated its savings at \$37.5 million.

HIGHER WAGES?

Processors such as Tyson, Mountaire Corp. and American Proteins Inc., already have unveiled one-time employee bonuses as a result of their tax savings.

WINNERS... AND MORE WINNERS

The new federal tax law cuts the top corporate tax rate to 21 percent from 35 percent. Publicly traded processors already are reporting the gains they expect because of it.

| COMPANY | OLD TAX RATE | 2018 TAX RATE OR RANGE (%) | BENEFIT OF LOWER TAXES OR RANGE |
|--------------------------|--------------|----------------------------|---------------------------------|
| Hormel Foods | 32.3 - 33.3 | 17.5 - 20.5 | \$110-140 million |
| Kraft Heinz | 28.6 | 23 | NA |
| Pilgrim's Pride | 26.9 | 24 | \$41.5 million |
| Sanderson Farms | 32.6 | 24.4 | \$37.5 million |
| Tyson Foods | 34.9 | 24 | \$300 million |
| TOTAL TAX SAVINGS | | | \$489-519 MILLION |

Sources: Companies



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Tyson in February announced bonuses of either \$1,000 or \$500 for more than 100,000 employees. Delaware-based Mountaire Farms, a poultry producer and processor, announced bonuses of between \$500 and \$1,000 for its employees based on their length of service. American Proteins, a poultry byproducts renderer, said in February it would give its 700 employees in Georgia and Alabama \$1,000 bonuses thanks to the new tax law.

Bonuses are one-time payouts, and may not be enough to attract or retain skilled workers in today's tight labor market. So expect to see salaries rise as some companies opt to invest their tax savings in their workforces.

"A portion of it is going to be reinvested into wages. We've seen that already happen," says Joe Agnese, a senior analyst with New York-based CFRA Research.

Indeed, even before the tax law was enacted, Sanderson Farms announced it was re-evaluating its wage structure

Tyson Foods reported the largest gain, a \$300 million savings, from the federal tax reform.



and announced its hourly wages will rise 3.6 percent this year, costing the company roughly \$13.2 million. Hormel has said its lowest allowable starting pay rate will be increased to \$14 per hour by the end of 2020.

Mike Cockrell, Sanderson Farms' chief financial officer, doesn't anticipate any further changes to the company's wage structure stemming from the roughly \$37 million savings from its new lower corporate tax rate. Sanderson estimated its tax rate for the first quarter of the year to be 24.4 percent, compared

to 32.6 percent in the same period the prior year.

Sanderson reports financial results on a fiscal year basis, rather than a calendar year, which means the benefits of the tax law change will span two of its fiscal years. Its first quarter included November and December of last year, when it paid the old, higher rate, and a month of the new year with the new lower rate in place, Cockrell explains.

While poultry processors want to increase plant efficiency, new automated equipment to perform tasks like removing

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breast meat from bone still aren't efficient enough to justify investments right now, contends Jeremy Scott, research analyst with Mizuho Americas. Such equipment may be 10 years away from being able to trim breast meat from bones as efficiently as human workers, he estimates.

So he expects poultry companies to raise wages in an effort to attract and retain skilled workers in a tightening labor market. The U.S. unemployment rate dropped to 4.1 percent in January and the Labor Department reported that average hourly wages, which have been largely stagnant through the current recovery, rose 2.9 percent.

OPERATING EFFICIENCY

Companies also can be expected to invest their windfalls in improving operating efficiencies.

"I think all the companies are going to speed up capital spending on new equipment to improve efficiency [and]

food safety," Agnese predicts. "We will see, across the board, increased efficiency and increased spending to increase sales growth."

The new tax law encourages investment in equipment by speeding up depreciation for some equipment purchases, notes Knox Wimberly, the tax department manager with Happytax.com, a Miami-based tax firm.

Sanderson has been growing by building new plants, rather than through acquisitions, and that will continue, Cockrell says.

"Our capital allocation strategy will not change. It has been our strategy to reinvest our profits back into the company to continue to grow aggressively. We prefer to go and grow by building brand new plants, greenfield operations. The cash benefit [from the tax cut] may allow us to execute that strategy more rapidly but the strategy will not change."

Hormel executives in their most



The theory is that consumers with tax savings in their pockets will buy more meat.



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recent quarterly earnings call mentioned investing in “plant automation, technologies and value-added capacity,” beginning in the company’s second quarter, which started in February.

GOING SHOPPING

Acquisitions are another approach to grow capacity but analysts don’t expect to see a big jump in takeovers because of the new tax law. True, it does provide potential acquirers with more capital to go shopping, but “within consumer packaged goods sector, where Tyson and Hormel are focused, valuations are high,” meaning potential targets are expensive, Scott says.

Speaking at the Consumer Analysts Group of New York’s annual conference in February, Tyson CEO Tom Hayes threw cold water on speculation the poultry giant might be after Pinnacle Foods, for example, saying that company didn’t have a high enough “protein profile” for Tyson. Pinnacle shares fell 3.67 percent on that news.

One provision of the new tax law could make takeovers financed with high levels of debt more expensive to pull off, points out Sehgal at accounting firm Green Hasson Janks. The law limits how much interest expense can be deducted against earnings, topping out at 30 percent of its gross earnings. That new limitation “could make a lot of companies rethink their corporate acquisition strategies or how they fund a corporate acquisition,” Sehgal says.

Deals that do happen may involve stock swaps or other financing methods that do not raise interest expenses, he explains.

DEMAND COULD INCREASE

Another consequence of the new tax law could be rising consumer confidence, which in turn could push protein

demand higher, Agnese says. One widely watched indicator of consumer confidence, the Conference Board’s Consumer Confidence Index, rose in February to its highest level since 2000.

“Consumption of animal products tend to have an increase with higher consumer incomes. This is especially true for beef,” agrees Chris Hurt, professor of agricultural economics at Purdue University.

“Low and moderate income consumers will be where this has the biggest impact on animal product consumption,” he continues. “As incomes rise, people will demand and ask for more convenience products.”

Higher income individuals already have enough disposable income to buy more expensive cuts so they likely will not significantly change their buying habits, even with more tax savings, he explains.

BOOST FOR EVERYBODY ELSE

The new tax laws allows people who receive what is known as pass-through income to deduct 20 percent of that income before calculating their tax load.

This could benefit poultry growers and cattlemen who have created S Corporations, sole proprietorships or partnerships for their operations. Such corporations typically pass their income through to the owners for the owners to pay taxes at their rate rather than for the company to pay taxes, Hurt notes.

But like new depreciation rules — no fewer than five sections of the new tax law deal with depreciation — the pass-through provisions are more complex than they may sound at first blush.

The new tax law certainly isn’t the simplified tax code some might have hoped it would be, but on balance it’s a major win for publicly traded processors and could be for smaller, privately held firms as well.



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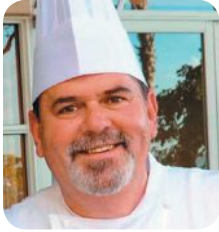
“ Leadership shakeup in animal rights—what could it mean for meat? ”

Hanna Thompson
Communications Director, Animal Agricultural Alliance
Animal Ag Watch



“ Use it or lose it; Google stats on data should give meat industry pause ”

Brittany Bailey
Director of Market Insights, National Pork Board
Millennial Musings



“ Shifting dining habits; It’s not your daddy’s food hall ”

Chef Michael Formichella
President and Co-owner, Chella Foods
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“ Wait for me, meat industry ”

Tom Johnston
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“ Is choice in the market endangered? ”

Yvonne Vizzier Thaxton
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Poultry Perspective



“ Red meat industry, what are you thinking? ”

Mack Graves
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Gregory Bloom
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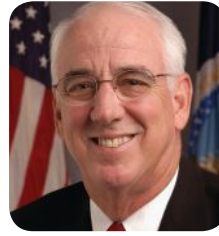
“ The New Swine Inspection System—playing with fire? ”

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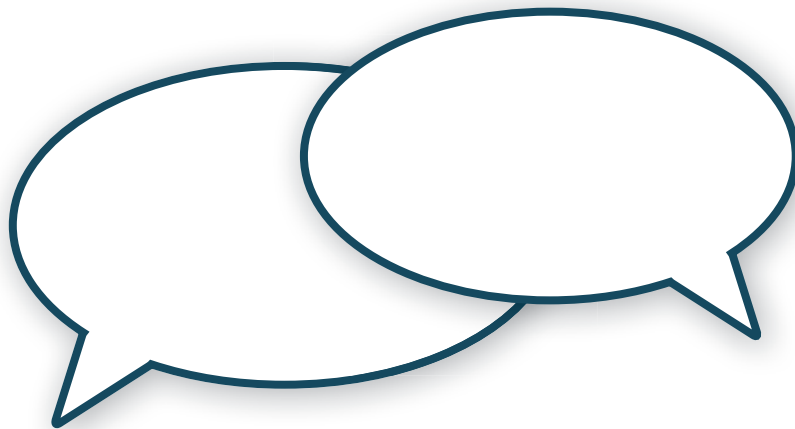
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Amazon (ification)

Amazon Go, a pilot project in cashierless retail, is part of a new retail culture that suppliers will have to work with.

Getty Images

THE ONLINE BEHEMOTH'S **ACQUISITION OF WHOLE FOODS** PROMISES CHANGES ALL THE WAY UP THE PROTEIN SUPPLY CHAIN.

by Susan Kelly, contributing editor

As Amazon begins to make its imprint on Whole Foods' brick-and-mortar stores, acquired just last summer, the potential the combination holds for a major acceleration of online grocery sales — not only in packaged goods but also fresh meat, dairy, produce and bakery — may be the biggest benefit for Amazon/Whole Foods suppliers, analysts say.

In the 2018 Power of Meat report — conducted by 210 Analytics LLC for the Food Marketing Institute and the North American Meat Institute, and sponsored by Sealed Air — the percentage of shoppers who said they at least occasionally buy grocery type items online clocked in at 38 percent, up from just 19 percent three years ago. Furthermore, 15 percent of

shoppers said they already buy meat and poultry products online at least sometimes, up from 3 percent in 2015.

“For brands, this will have, and already has had, widespread implications, with food sales moving online in record volumes,” said Nathan Rigby, vice president of sales and marketing at e-commerce data analytics firm One Click Retail. “The growth potential for online sales of groceries in 2018, and fresh foods in particular, is huge. In all likelihood, this is the tipping point we have been waiting for.”

NOT THE 'WHOLE PAYCHECK'

Amazon's acquisition of Whole Foods is expected to accelerate that trend. After two years of



For more on the Amazon/WF deal:
meatm.ag/
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The AmazonFresh service has seen a boost from the addition of Whole Foods' products to its line-up.

Getty Images

steadily eroding sales and facing pressure from an activist investor, Whole Foods Market last June agreed to become a unit of e-commerce giant Amazon.

Signaling its intent to shake the "Whole Paycheck" nickname that had long dogged the upscale supermarket chain, Amazon quickly announced plans to slash prices on some of the most popular items sold in Whole Foods stores, such as organic rotisserie chicken and animal welfare-rated, 85 percent lean ground beef. This, even before the \$13.7 billion deal closed in August.

"We're determined to make healthy and organic food affordable for everyone," Amazon said in a news release at the time, promising more price cuts to come.

Now, six months later, the combined company is lurching toward its goal of bringing natural and organic food to the masses. Despite reports of empty store shelves and supplier backlash against new merchandising fees, Amazon's strong fourth-quarter results, reported in February, included physical store sales of \$4.52 billion that were slightly better than it had expected, the company said. Amazon's

The percentage of shoppers who said they at least occasionally buy grocery type items online clocked in at **38 percent**, up from just 19 percent three years ago.

physical stores are primarily its roughly 470 Whole Foods supermarket locations.

Prices on items in Whole Foods stores are indeed coming down — by 10 percent to 43 percent on produce and refrigerated fresh food staples immediately following the close of the merger, according to consumer market research firm Packaged Facts.

And in a survey of the top grocers released in March, JP Morgan equity analysts found that Whole Foods has remained aggressive on price. Whole Foods' average price premium vs. Kroger declined to 21 percent from 29 percent in May 2017, the firm said in an equity research report on the food retail sector. Whole Foods' price reductions outpaced the grocer average across every category, with the meat and deli premium to Kroger narrowing to 29 percent from 42 percent, J.P. Morgan said in its report.

MASS VS. NICHE

Behind the scenes, a clash of cultures is playing out that has smaller vendors worried about how they will fit into Amazon's mass-distribution model,



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said Jay Jacobowitz, president of Retail Insights, a natural products consultant in Brattleboro, Vt. Whole Foods cultivated a network of independent suppliers catering to local demands, conditions and tastes, but Amazon is centralizing its purchasing, making it harder for specialty products to reach Whole Foods' shelves, he said. "This business is about scale. It is not about niche," Jacobowitz said.

He estimates the changes are affecting 10 to 15 percent of sales generated by the product assortment on store shelves, or 5,000 to 10,000 SKUs. "So you've got a whole lot of pain at the regional and local vendor level," Jacobowitz said.

Media reports of out-of-stock products in some markets likely resulted from the combination of a new just-in-time order system and the loss of regional and local vendors, he said.

Furthermore, Whole Foods recently informed suppliers they will be required to help pay for new in-store merchandising and demonstration programs, according to *The Washington Post*, which is owned by Amazon CEO Jeff Bezos. Suppliers that sell more than \$300,000 worth of goods annually are expected to discount their products by 3 percent for groceries or 5 percent for health and beauty products.

Whole Foods representatives did not respond to requests for comment. Company spokeswoman Brooke Buchanan told CNN in February that Whole Foods is not reducing local inventory under its new category management process and continues to seek out innovative new products to introduce.

Meanwhile, Whole Foods representatives reportedly were set to meet with suppliers in mid-March to clear the air and perhaps assuage concerns.

BIGGER, BETTER

In the long run, large national suppliers clearly stand to benefit from the combination. One processor gearing up for big things from its relationship with Amazon/Whole Foods is Pilgrim's Pride Corp. The company's Just Bare line of organic and no-antibiotics-ever products is the No. 1 fresh chicken brand sold on AmazonFresh.



Shoppers at Amazon Go "check out" by scanning an app on their smartphone on their way out the door.

Getty Images

"The growth potential for online sales of groceries in 2018, and fresh foods in particular, is huge. In all likelihood, this is the tipping point we have been waiting for."

In 2017, dollar sales of the Just Bare brand more than tripled from the previous year, Pilgrim's CEO Bill Lovette said on the company's quarterly earnings call in February. He said Pilgrim's plans to double its Just Bare distribution by year-end.

Growing sales are largely due to the expanding number of regions where the AmazonFresh grocery delivery service is offered, coupled with the increasing exposure, and loyalty, to the brand among the service's shoppers, says the company's head of corporate affairs, Cameron Bruett.

Chicken overall is now the No. 3 fresh organic category, behind packaged salad and berries, with sales of more than \$312.7 million in 2017, according to market research firm Nielsen.

While retail stores continue to generate most of the Just Bare brand's sales, its fastest-growing channel is online, Bruett says. "As Amazon continues to ... bring innovative options to consumers, we will continue to offer innovative products that allow Pilgrim's to grow with them," he says.

For example, Just Bare is the only fresh chicken offering in the Amazon Go Store. This new checkout-free store model, being tested in Seattle, has a series of technologies, including machine learning, computer vision and artificial intelligence, as well as sensors on packages that

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Whole Foods' meat case is lauded for its variety of organic, natural and humanely raised meats, a reputation Amazon plans to build on.

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are read and tallied by computers in-store. Consumers “check out” via an automated turnstile using a smartphone app.

Meanwhile, AmazonFresh, which offers same-day grocery delivery to Amazon Prime customers, posted a 35 percent jump in sales, to \$135 million, in the last four months of 2017, compared to the prior four months, according to One Click Retail. It credits the addition of Whole Foods products for the increase. AmazonFresh is available to Amazon Prime members as an add-on service. Amazon Prime is \$12.99 a month, or \$99 a year; the Fresh add-on is \$14.99 a month.

ONLINE, ON FIRE

Retail experts predict incredible growth in online grocery sales in the next few years. Packaged Facts forecasts online grocery sales overall will more

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Behind the scenes, a clash of cultures is playing out that has smaller vendors worried about how they will fit into Amazon's mass-distribution model.

than triple by 2022, reaching \$41.7 billion, with a compound annual growth rate of 27.1 percent. Amazon last year led the U.S. online grocery market with an 18 percent share, double that of its nearest competitor, Walmart, according to the firm's data.

Leading natural and organic products company Hain Celestial, the largest branded supplier to Whole Foods, has also pointed to Amazon's acquisition of the grocery chain as a catalyst for accelerating sales. CEO Irwin Simon told CNBC in February that the company has seen a dramatic increase in sales volume through Whole Foods, offsetting price reductions. Hain Celestial has 1,500 SKUs at Whole Foods stores and 1,100 SKUs on Amazon.

But the company has announced it is exploring the divestiture of its Hain Pure Protein business, despite strong sales for its meat brands. Fiscal

second-quarter sales announced in February were up 15 percent for Plainville Farms, 17 percent for FreeBird and 7 percent for Empire Kosher, compared with the year-ago period.

With most of the company's plants on the East Coast, however, it's hard to ship beyond the Midwest and Southeast, and adding facilities would require a tremendous capital investment, Simon said. "It being part of a larger, strategic poultry company makes a lot more sense," the CEO said.

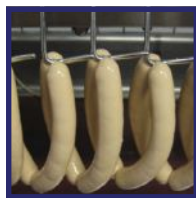
Another meat products maker, Devault Foods, is embracing the potential to reach more customers for its Philly cheesesteaks and other products online through Amazon. The Devault, Pa.-based company in September launched a sampling of its cheesesteak products nationwide on the Amazon Marketplace.

"We were quite pleased that early sales came

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from local fans, but also from fans in other regions. We believe that the primary driver in sales from other regions came from Philly transplants,” says Devault Foods Executive Vice President Thomas Fillippo.

Devault added three of its meatball products to the Amazon Marketplace in November and plans to expand its offerings again with a selection of its burger products in time for the spring grilling season. Traffic to the Devault Foods listings and sales in both product categories grew at a steady pace into February, the company said. “We believe that consumers are prioritizing quality and convenience,” Fillippo says. Amazon Marketplace is making stocking up on family favorites both convenient and cost effective, he adds.

“The features and ease-of-use platform

“**[Most] grocery shopping still takes place in traditional brick-and-mortar stores. This pattern will change.**”

presented by Amazon Marketplace level the playing field for regional manufacturers like Devault Foods,” adds company spokeswoman Cindi Sutera. “We look forward to exploring the opportunities of the Marketplace and additional channels developed by the Amazon and Whole Foods merger.”

AMAZONIAN

Amazon sold an estimated \$2 billion in groceries in the United States last year, an increase of 59 percent over the prior year, according to One Click Retail. Among Amazon’s private labels, Whole Foods’ 365 Everyday Value is now its No. 2 best-selling brand, behind AmazonBasics.

In addition to selling groceries, including Whole Foods items, through its Marketplace platform, Amazon also offers the Prime Pantry

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'This business is about scale. It is not about niche.'

and Amazon Prime Now services. Sales of grocery products are gaining momentum on Prime Now, which offers free two-hour delivery from Whole Foods stores on orders over \$35. Consumers who want their groceries delivered within one hour can pay \$7.99 for that convenience, on orders totaling at least \$35.

The arrival of Prime Now is expected to drive growth in online grocery ordering and change behavior among food shoppers by boosting demand for faster deliveries, as consumers become more comfortable with the experience, according to research by Morgan Stanley. Although perishable foods are less likely to be ordered online, the firm's research shows an even split between perishables and non-perishables for pick-up at a store.

Prime Now rolled out in four U.S. markets in

February — Dallas and Austin, Texas; Cincinnati; and Virginia Beach, Va. — with plans to expand across the country in 2018. Unlike Prime Pantry, which offers only shelf-stable foods and household goods, Prime Now includes thousands of products ranging from meat and seafood to flowers and bakery items. In early March, Amazon said it expanded the service to Atlanta and San Francisco.

Devault Foods said it expects Amazon to expand Prime Now into the Philadelphia area and is positioning itself to leverage its Amazon relationship: "[Most] grocery shopping still takes place in traditional brick-and-mortar stores. This pattern will change during the next decade as our internet-centric society develops marketplaces to make daily life more convenient," says Devault's Fillippo.

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The birth of an **INDUSTRY**

Food scientist **John N. Butts** helped in the creation of the food safety discipline as it is practiced today.

by **Judith Crown**, contributing editor

Food safety expert John N. Butts has led the charge to keep processed meat free of lethal pathogens and played a central role in developing industry standards for the design of plants and equipment.

Raised on a farm in southeast Kansas, Butts studied animal physiology and food science and earned a Ph.D. in food science. Realizing he was temperamentally better suited to industry than academia, he joined privately held Land O' Frost in 1974 as director of research.

He has been a constant leader in developing company and industry-wide practices for food safety, including the "Seek and Destroy" process for controlling and eradicating harmful bacteria. He's earned numerous awards and recognitions — most recently the 2016 NSF Lifetime Achievement Award presented at the Food Safety Summit. He now is adviser to the CEO at Land O' Frost and runs a consulting practice, Food Safety by Design.

Meetingplace: What was the state of meat safety when you began at Land O' Frost?

Photo by Tim Robertstad



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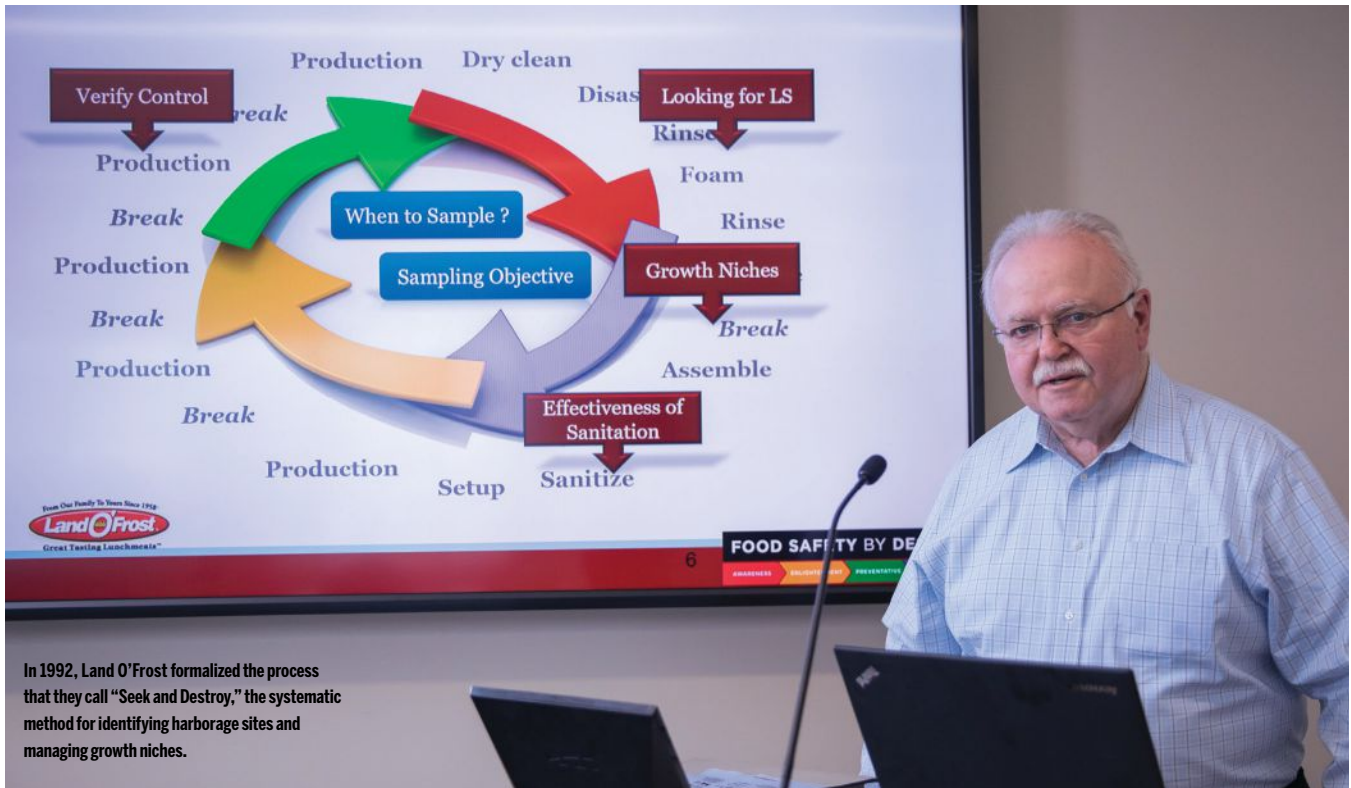


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In 1992, Land O'Frost formalized the process that they call "Seek and Destroy," the systematic method for identifying harborage sites and managing growth niches.

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For more background on John Butts, visit meatm.ag/butts-award

mine and we started boning turkeys bare-handed. We violated so many safety principles, but that's the way it was.

Meetingplace: The 1993 Jack-in-the-Box E. coli tragedy marked a turning point for the industry. How did things change?

BUTTS: It was a shock. The industry had relied on the cooking step to assure meat safety. Pathogens were common and acceptable at that point in raw product. An outbreak had not occurred to cause the food safety alarm in our system. We reached the tipping point. The USDA in 1996 established the Mega Reg, which mandated the Hazard Analysis and Critical Control Point (HACCP) system for meat inspection and meant you no longer could have E. coli O157:h7 in raw hamburger.

Meetingplace: Listeria turned out to be the bigger issue for processed meat suppliers such as Land O' Frost.

BUTTS: Right. E.coli is the pathogen of concern with ground beef. Listeria is an environmental pathogen — it harbors in our plants.

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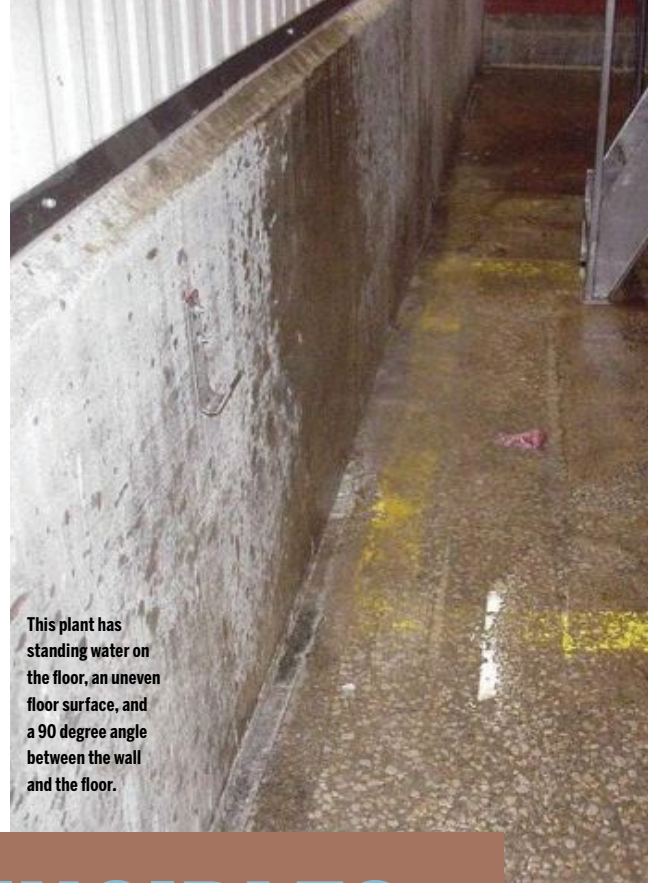
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Wall and curb surfaces, like the ones seen here at an angle against the walls, drain freely.



This plant has standing water on the floor, an uneven floor surface, and a 90 degree angle between the wall and the floor.

There were outbreaks of listeria in the 1980s: contamination of Mexican cheese, and a cancer patient in Oklahoma City died from eating a turkey frank. In 1989, we had Russ Flowers of Silliker Labs assessing our plants and we asked him what we could do to combat listeria in our Searcy, Ark., facility. He went to a whiteboard and drew a picture of our plant with a line through the middle separating the raw side from the cooked side. He explained if you get a positive on the floor of the packaging room, how do you know it didn't come from your cook room, a warm, wet environment?

Meatingplace: So you redesigned your plants?

BUTTS: That prompted us to physically separate raw and cooked to the point that we were taking rework from the back end of the plant, putting it on a semi-truck and using the yard dog to pull it around to the front of the plant, and receiving it as an ingredient rather than bringing it through the plant.

Meatingplace: It was at the same time that the industry began to cooperate on listeria control?

BUTTS: Four of us, including Bruce Tompkin of Armour Swift-Eckrich,

10 PRINCIPLES of Sanitary Design (for ready-to-eat equipment)

1. Cleanable to a microbiological level: Food equipment must be constructed to ensure effective and efficient cleaning and designed to prevent growth of bacteria.
2. Made of compatible materials: Construction materials must be compatible with the product, environment, cleaning and sanitizing chemicals and cleaning methods.
3. Accessible for inspection, maintenance, cleaning and sanitation: All parts should be readily accessible for inspection, maintenance, cleaning and sanitation without the use of tools.
4. No product or liquid collection: Equipment should be self-draining to assure that liquid, which can harbor and promote the growth of bacteria, does not accumulate, pool or condense.
5. Hollow areas should be hermetically sealed: Hollow areas such as frames and rollers must be eliminated wherever possible or permanently sealed. Bolts, studs and other items must be continuously welded to the surface and not attached by drilled and tapped holes.
6. No niches: Equipment parts should be free of niches such as pits, cracks, corrosion, recesses, open seams, gaps, lap seams, protruding ledges, inside threads, bolt rivets and dead ends.
7. Sanitary operational performance: During normal operations, the equipment must perform so it doesn't contribute to unsanitary conditions or the harborage and growth of bacteria.
8. Hygienic design of maintenance enclosures: Maintenance enclosures and interfaces such as push buttons, valve handles, switches and touchscreens must be designed to ensure food product, water or liquid doesn't penetrate or accumulate. The enclosures should be sloped or pitched.
9. Hygienic compatibility with other plant systems: Equipment design must ensure hygienic compatibility with other equipment and systems, such as electrical, hydraulics, steam, air and water.
10. Validate cleaning and sanitizing protocols: Procedures for cleaning and sanitation must be clearly written, designed and proven effective and efficient. Chemicals recommended for cleaning must be compatible with the equipment and the manufacturing environment.

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approached the USDA administrator in 1989. There was a motivation to avoid regulation — but, at that point the dialogue had begun. In the early 1990s an Oscar Mayer engineer shared information with our American Meat Institute Scientific Affairs Committee about harborage he found taking apart a slicer. It was shocking — the pictures were not real pretty.

36 *Our industry, which historically has had a terrible reputation, was the first one in food production to advocate sharing of best practices, and since then we've become recognized as the leading industry for food safety among all the food industries.* 

Meatingplace: How did you react at Land O' Frost?

BUTTS: In 1992 we formed our first pathogen control team. It was called the SLI team for 'shelflife improvement.' There was no way we were going to use the word 'listeria.' The team met every Tuesday morning, and the meetings still take place today. They formalized the process that we call 'Seek and Destroy,' the systematic method for identifying harborage sites and managing growth niches.

Meatingplace: How does 'Seek and Destroy' work — how do you know what equipment presents a potential hazard?

BUTTS: The key is following the data. We have an aggressive sampling program designed to find problems. It's all about going beyond verification sampling to

identifying potential problems ... while measuring facility and equipment design problems or risk.

In the earlier days, we didn't always know where the microorganisms came from. We didn't have interventions for equipment. We didn't know how to clean the floors. Many of us had wet processes, and water is a friend for listeria. As we learned more about movement of the organism we came to realize the importance of dry floors.

11 PRINCIPLES of Facility Design

1. Distinct hygienic zones: Maintain strict physical separations that reduce the likelihood of transfer of hazards from one area of the plant to another.
2. Controlled movement of personnel and material flows to reduce hazards: Establish traffic and process flows that control the movement of all personnel and products.
3. Water accumulation controlled inside the facility: Design and construct a building system that prevents the accumulation of water. Ensure that all water drains from the process area and that these areas will dry during the allotted time frames.
4. Room temperature and humidity controlled: Control room temperature and humidity to control microbial growth. Keeping process areas cold and dry will reduce the likelihood of food borne pathogens.
5. Room air flow and room air quality controlled: Design, install and maintain HVAC/refrigeration systems serving process areas to ensure air flow will be from more clean to less clean areas. Filter air to control contaminants.
6. Site elements facilitate sanitary conditions: Provide site elements such as exterior grounds, lighting, grading and water management systems to facilitate sanitary conditions. Control access to the site.
7. Building envelope facilitates sanitary conditions: Design and construct all openings in the building such as doors and fans so that insects and rodents have no harborage around the building perimeter or easy route into the facility.
8. Interior spatial design promotes sanitation: Provide interior spatial design that enables cleaning, sanitation and maintenance.
9. Building components and construction facilitate sanitary conditions: Design building components to prevent harborage points, ensuring sealed joints and the absence of voids.
10. Design utility systems to prevent contamination: Design and install utility systems to prevent the introduction of food safety hazards by providing surfaces that are cleanable to a microbiological level.
11. Sanitation integrated into facility design: Provide proper sanitation systems to eliminate chemical, physical and microbiological hazards.

Meatingplace: Just as processed meat companies were getting a handle on the listeria threat, the 1998 outbreak at a Sara Lee Bil-Mar plant in Michigan (now owned by Tyson) sickened more than 100 customers and was linked to 21 deaths. This was a second wake-up call?

BUTTS: This outbreak sparked the emergence of the food safety profession in the meat industry in 2000. It is believed the Bil-Mar plant over Fourth of July



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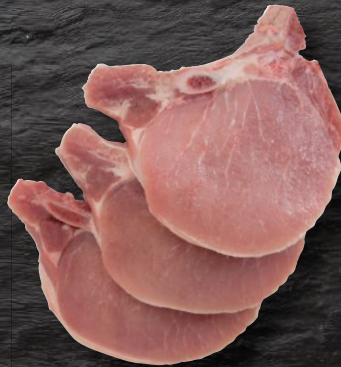
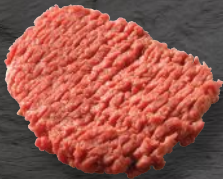
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weekend had removed a ceiling condensing refrigeration unit, spreading the listeria. The problem wasn't known until months later. The Center for Disease Control had just started using PulseNet technology, which compares bacterial DNA fingerprints among patients and traces it back to the food and the plant that produced it. The outbreak was covered by "20/20" and CNN. I use the clips when I train CEOs to hourly employees in listeria control — it puts a face on the issue.

Meatingplace: What was the immediate aftermath?

BUTTS: We were in the limelight, and it wasn't comfortable. Plants were shut down by the government and others had to rebuild entire ready-to-eat areas. From 1990 to 2000, the industry



Where utilities are routed through walls, unsealed connections are harborage points for pathogens.

Photo by Matt Henderson/Land O'Frost

reduced the incidence of Lm to less than 1.5 percent from almost 5 percent. Fortunately, normal healthy adults can eat that without serious problems. It's when you consume a virulent Lm in high enough concentration to get into the bloodstream that there are serious illnesses and fatalities. We had this

intense regulatory and consumer focus [like they] thought we felt it was OK for us to kill our customers.

Meatingplace: What steps were taken at Land O' Frost?

BUTTS: It was a traumatic time for us. Land O' Frost could not survive an event like [the Bil-Mar incident] as a company.

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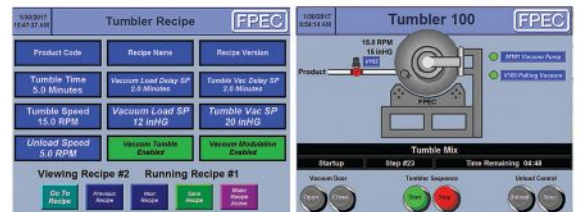
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We would have been out of business. One of the first actions was the separation of quality and food safety. The technical knowledge and attention required exceeded an individual's capability at plant level. Our needs were so significant that we had to dedicate a master's level person on that. Food safety management now went well beyond the plant or corporate microbiologist. It had to be translated to process and facility design, equipment design, and manufacturing practices. We developed a computer program that enabled us to drive sampling and it communicated with the lab.

Meatingplace: And by the industry as a whole?

BUTTS: A group of us began a series of workshops in November 2000 — industry only, no regulators, no press. I was



Although pipes and connections pose unique challenges to food safety, they can be sealed to prevent harborage points.

Photo by Matt Henderson/Land O'Frost

involved because of my knowledge of construction process control. In the late 1990s when we were redoing floors in our Searcy plant, we had found dust had migrated out of the room that was under construction into a log holding cooler where we had to re-process about a mil-

lion pounds of product to assure safety. I put together a presentation on construction process control — that got me invited to the party.

I volunteered to present data analysis, investigation and corrective action, the core of the 'Seek and Destroy' process.

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I was on the board of the American Meat Institute (now NAMI) in 2001 when the board voted to make food safety noncompetitive in our industry. The board created task forces for equipment and later one for facilities. They went on to develop the 10 Principles of Sanitary Design and 11 Principles of Facility Design that are followed by the entire food industry today (see sidebars, pages 60, 62).

So our industry, which historically has had a terrible reputation, was the first in food production to advocate sharing best practices, and since then we've become recognized as the leading industry for food safety among all the food industries.

Meatingplace: How do you train sanitation crews and convey the importance of their jobs?

BUTTS: It's a midnight shift typically. It's wet, it's dirty, it's tough.

Our sanitation crew rates the highest in engagement than any other department. We listen to their problems and take appropriate action, No. 1. And we measure them, No. 2. Plant management is charged with making sure the sanitation crew knows they have the most important job in the facility. It also helps when the plant manager serves them pizza and recognizes them for doing a good job at 3 a.m.

Meatingplace: What about other teams working on the plant floor?

BUTTS: It's a process that starts Day 1 when they come in. If you drop product on the floor, you don't pick it up. [Others] will do that. You must wash your hands. And we'll give you a sponge swab and you can

swab your hands and we'll analyze that and share those results with you. We do that randomly to get a level of process control. Once you get a process under control, it becomes predictable.

When in a plant, I will intentionally violate a GMP. I want to see who stops me. The former CEO Paul Van Eekeren [father of current CEO David Van Eekeren] liked to tinker with the equipment. One time he reached for a machine and the operator grabbed his hand and said, 'You can't do that; this is my machine.'

Meatingplace: How did the industry come to understand the importance of equipment design to food safety?

BUTTS: Equipment design became a focal point. We worked with our suppliers and we worked internally. Some equip-

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Once you get a process under control, it becomes predictable.



Photo by Tim Robertstad

ment you can redesign, other pieces you have to discard.

Meatingplace: What new technologies have been applied to make equipment safer?

BUTTS: We've learned early on to cook a piece of equipment. You actually wrap it in a tent and use steam to get rid of the bacteria. We do that or disassemble the machinery. Today one- or no-tool disassembly is becoming a reality. Our suppliers

are providing simpler and more effective sanitary designs.

Meatingplace: What are the next frontiers in food safety?

BUTTS: Whole genome sequencing is happening today.

Tomorrow, real-time pathogen identification will challenge sampling schemes. Will all meat have to be free of potential pathogens including viruses?

We now live in a social media world. Future food safety professionals must be prepared for how to take advantage of the new technology coming at them in the midst of their business being re-engineered to meet the needs of the competitive marketplace.


The challenge extends beyond food safety during production to building consumer trust in us and our products.

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SVP of Operations
Michael Sheets, founder
and CEO Mark Sosebee,
and GM and Director of
Sales Blake Wikle

In the middle of the Poultry Capital of the World, Gold Creek Foods sits like Goldilocks in the Baby Bear's chair: Surrounded by bigger and smaller poultry companies in Gainesville, Ga., Gold Creek's niche is *juuuuuust* right.

And what Gold Creek does is operate as the partner to, or extension of, other processors' production lines, an escape valve for the pressures of under-capacity, extra hands in a tight labor market, and a safe place to test new concepts — "the industry's best-kept secret," says Gold Creek founder and CEO Mark Sosebee. "At least as far as we know, we're the only non fully-integrated company that can break down an entire chicken into fully-cooked, ready-to-eat parts."

ONCE
upon a time in

GAINESVILLE



Photos by Erin Adams

SVILLE

Gold Creek Foods has created a charmed, niche-filling existence as a poultry processor to other poultry processors.

by Lisa M. Keefe, editor

COMPANYprofile

EVOLUTION

With revenues north of \$200 million (Sosebee declines to be specific) and 1,380 employees, Gold Creek isn't a small company. Surrounded by plants operated by Tyson (\$34.4 billion annual revenues), Perdue (more than \$6 billion), Koch Foods (est. \$3 billion) and Fieldale Farms (est. \$1.2 billion), however, Gold Creek has flown under the radar. And that's fine by Sosebee and his team; they don't call those other companies "competitors" anyway, but "partners."

"We're the biggest of the smallest," Sosebee says.

Gold Creek's genesis lies in Sosebee's experience starting up Agora Foods, a frozen chicken products distributor in Gainesville. Agora was essentially a marketing company, in keeping with the founder's sales and marketing background, and all the goods were co-packed.

His experience in that, he says, taught him that "we just wanted to have control of running our own products. Co-packers then were not as accessible as we are. We're able to give our customers what I would have loved to have had. We've become now what I needed back then."

What Gold Creek has become is more than just a co-packer: Gold Creek can take whole lots and debone the front half, debone the leg, cut the wings into sections, size and x-ray the breast meat, size and x-ray the tender and now — with a newly operational, \$26 million RTE line — the company can fry and bake the products, then freeze and package them.

Its production lines are short and low-volume, but not too low-volume: Gold Creek processes more than 300 million pounds of chicken products a year in five locations.

The modular equipment can be set up and taken down in a vast array of configurations several times a day, and often is.

Gold Creek is the company other companies call when they're running flat-out but need to increase the volume on some products. Or, when they want to move into new markets, but slowly.

Explains Sosebee, "If you take a monstrous company and their sales department says, 'We've got a concept' — say it's organic or NAE or pos-

“

For us, 50,000 pounds or 100,000 pounds is not something that we shy away from.

WE'RE COMFORTABLE SWIMMING IN THAT WATER.

”



sibly a gluten-free item — and the sales haven't exceeded a point where they're earth-shattering, it may be something that they don't want to shut down their 15,000 pound-an-hour line to play with. But for us, 50,000 pounds or 100,000 pounds is not something that we shy away from. We're comfortable swimming in that water."

Executives decline to name customers' names, but safe to say the roster covers the major brands in the business, as well as "the minors and the small guys," Sosebee says.



For past coverage of Gold Creek Foods, go to meatm.ag/gcdahlon meatm.ag/gcadd200 meatm.ag/gcrte



AT A GLANCE

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(RTE PRODUCTS)/GOLD
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PROCESSING:**
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LOCATION:
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EMPLOYEES:
1,380

PRODUCTS:
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FOUNDER:
MARK SOSEBEE,
49

THE WATER'S FINE

In order to continue swimming in that pool, Gold Creek has invested heavily in technology and automation to ensure food safety and sufficient labor to do the work.

For example, on the RTE line, which started up in November, Gold Creek can convert a frozen block of chicken into a 1-lb. bag of chicken nuggets for retail sale with almost no human handling of the product.

"From the time that frozen block hits a con-

veyor, a human hand doesn't have to touch it until they put it in a box ready for the shipping dock," points out Gold Creek Vice President Blake Wikle.

Whereas a typical production line might grind the meat up, then store it in combos or vats for a day or two before forming the nuggets, Gold Creek's line is set up to go right from grinder to blender to former to cooking, and on to packaging, Wikle explains: "That has a massive impact on food safety."

On the raw side, Gold Creek does more hand-

COMPANYprofile

work, often because the customer asks for it as a means of differentiating its products. But, Gold Creek also has two water-jet cutters that automatically map out and make cuts on the breast, for diced meat, for example.

In the vein of sanitary plant design, as the new RTE line was being designed, Sosebee explains, Gold Creek executives pumped their poultry industry partners for their experiences building — or rebuilding — facilities.

“We’d go to their plants and they would share with us: ‘We wish we would have done that,’ or, ‘We did this and it was brilliant and it worked great,’” he says. “So if you look at our mezzanine, for example, we probably took three to four months in designing our mezzanine. We talked to people who did it terribly wrong ... [and showed us] what they did on the second go-round. We tried to take what some people did on their second go-round and we did it on our first.

“Visiting plants just to look at mezzanines to some people may sound crazy, but to us we know that that’s where a lot of people have listeria problems in the past.”

Another area of focus is foreign material detection. Every piece of equipment the company purchased had certain requirements for “world-class” foreign material reduction. And, Gold Creek put an x-ray behind every bagger, Sosebee says.

“If you have a brand that’s worth millions of dollars, you have to trust that when it’s produced here, [you] have as much confidence [in us] as [you] do in [your] own team,” he adds.

FINDING AND KEEPING

Finally, Gold Creek is an answer to some poultry integrators’ prayers in a tight labor market that’s only getting tighter. When their own resources are maxed out, Gold Creek can help meet production deadlines.

“Some folks are faced with either a reduction in kill or to work with partners like Gold Creek to maximize their profits,” Sosebee says. “Our retention is quite good. We have a lot of steps in securing and maintaining our labor here.”

The company’s turnover is lower than the



Late last year, Gold Creek turned the switch on a new, \$26 million RTE line.

NINE OF THE 17 PEOPLE hired to work in Gold Creek’s first processing plant in 2003 **ARE STILL WITH THE COMPANY.**

industry average, and more than 40 percent of the production employees are a “core group” that have worked there for years, says Michael Sheets, Gold Creek’s vice president of operations.

In fact, nine of the 17 people hired to work in Gold Creek’s first processing plant in 2003 are still with the company, several in management positions.

The company’s hourly rate ranges from about \$10 to \$19 an hour, Sheets says, but most of the production jobs, those that require hand-work per the customer’s specifications, are paid on performance — another advantage of Gold Creek’s size, as the record-keeping could be monstrous for a much larger processor.

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UP/DOWN



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Niche. Narrow market segments have a way of morphing and changing over time.



Food safety. Gold Creek's laser focus on safety makes it an easy choice for a major consumer brand seeking a production partner.



Chicken. Demand for poultry just keeps rising, as does demand for the kind of value-add work that Gold Creek does.



Chicken. It's still a commodity, and while there are no input cost shocks on the horizon, the market is vulnerable to economic shifts.

At Gold Creek, once an employee who is hand-deboning tenders, for example, reaches the order's lot weight, the meat is weighed and inspected for quality. Within a few minutes, he knows if he needs to rework any product, which would cut into his earnings. Each person's productivity for the day is displayed on a wall.

"A lot of care goes into making sure that we're transparent about that," Sheets says.

Gold Creek still recruits heavily to keep the pool of candidates fresh, but also works to retain hires. Its efforts to secure transportation is a big draw: The company's buses pick up and drop off employees who lack transportation, going to places "other companies don't go," Wikle says.

Gold Creek also lobbied the Gainesville municipal transportation authority to route one of its bus lines past its headquarters and nearby production facility, and add a stop at its gate. And as the RTE line was being tested, and some

employees were required to stay overtime, Gold Creek set up relationships with local cab companies to make sure everybody got home.

"To sum it up, we provide good transportation when folks just need us," Sosebee says.

Gold Creek also makes sure it gets its training right, Sheets says. One of the company's plant managers, he says, has a training program that's "better than anything I'd ever seen. He might have eight people starting today and his whole day is with those eight people," although he manages hundreds of employees.

"When those guys leave that training area and get in with the general population, they are just at a different level. We have a core group of people that just get that," Sheets says.

ON THE RADAR

Moving forward, Gold Creek is looking for more opportunities to be on the radar screen.

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At Gold Creek Foods, we measure success by exceeding our customers' expectations; we succeed by partnering with companies like Heat and Control that also go the extra mile. We were drawn to them because they have been at the forefront of innovation for more than sixty years.

Blake Wikle
General Manager
of Prepared Foods,
Gold Creek Foods



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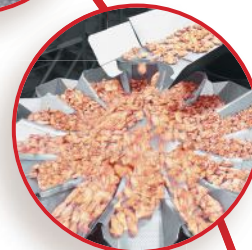
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“There’s a lot of our process that we are ecstatic about showing the world,” Wikle says.

“We want to show as a copacker that we have put a lot of thought and a lot of investment into being the most food safe, fully-cooked plant in America.”

It bodes well for the company’s goals that the management team is liable to stay in place for years go come. Sosebee, for example, is only 49, and says he’s no less passionate about the business now than he was when he started.

“I have a photograph of one of my ancestors — my son found it — and he was actually in the food distribution business in, like, 1830,” Sosebee says.

“You can’t create passion; you can only try to curtail it. I just think it’s something you’re sort of born with.”

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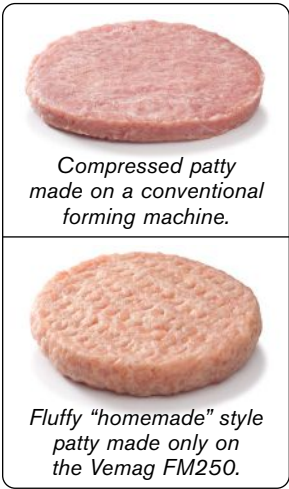
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‘Street’ SMART

Lenny Lebovich has used Wall Street experience and acumen to build a rapidly growing beef brand in the highly challenging grass-fed market.

by Tom Johnston, managing editor

You are what you sell.

Lenny Lebovich, founder of Chicago-based premium grass-fed beef marketer PRE Brands, is a product. He’s made from parents who risked it all and immigrated to the United States from Ukraine in search of a better life.

That type of experience molds a do-or-die mindset. Lebovich grew up knowing the necessity and the value of hard work and doing things well. It’s why he says, “I’ve been an entrepreneur since I was a little kid.”

Lebovich took cues from his dad, a

master tailor who helped root the family in Cleveland, Ohio, by working for one of the nation’s top clothing stores. “So I learned from him how you serve the premium consumer and do things at a level that gives you an advantage,” he says.

The advantage he says that PRE Brands has, in a U.S. grass-fed beef market whose inconsistency in quality has stunted its growth, is its obsessive focus on satisfying the consumer who wants a premium product that tastes great and allows them to feel good about eating it.

Lebovich has tirelessly researched and

analyzed consumer preferences over the years, a habit he developed while working for three years on Wall Street. He wanted to build skills that would allow him to seize on good business opportunities and solve problems. In the complexity of the beef industry, he can scratch both of those itches.

We sat down with Lebovich in PRE Brands’ very millennial, very naturally lit, Google-y office, where self-described “beef geeks” can play ping pong, to discuss how his company is shaking things up and thriving in a segment of the industry that he says, quite frankly, is not.



LENNY LEBOVICH

||||
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FOUNDER, CEO

||||
COMPANY:
PRE BRANDS

||||
HEADQUARTERS:
CHICAGO

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THOUGHTleader



“ Trying to introduce something new *into a culture that is happy with the way it’s doing business* can be hard. ”

Meatingplace: What led you into a career on Wall Street?

LEBOVICH: When I was coming out of school, I knew that I wanted to get some foundation in finance and sales ... and I got a few years of great experience. My first job was with the securities division of Bank of America and subsequently I worked for a West Coast investment bank called Jefferies.

Meatingplace: What led you away from Wall Street?

LEBOVICH: I knew going in I was not going to spend more than three years doing it; I just wanted to get the experience. ... It gave me some credibility to do some other things. The first opportunity

I had to do something more creative and entrepreneurial, I left Wall Street and went into telecommunications. I joined a company where I was doing mergers and acquisitions and other strategic things. We took that company public. It was an opportunity for me to start building things, growing things, and solving problems.

Meatingplace: So how did you get into the beef industry?

LEBOVICH: Through a college roommate, Walter Sommers, whose family owned the oldest operating beef company in Chicago, established in 1860, called Ruprecht Company. He wanted to expand strategically, through acquisi-

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THOUGHTleader

“ For a long time now consumers have felt guilty about eating beef, **but they want to**, so you have to create a platform for them to be able to make the choices they want to make. ”

tion, and he knew that I knew how to do that and asked if I could help his family acquire a business. So ... I went from evaluating acquisition opportunities to running a USDA establishment. It's a steep learning curve.

Meetingplace: In a world of Facebook, Amazon and Bitcoin, why would a Wall Street guy find the beef business interesting?

LEBOVICH: I've been a problem solver since I was a little kid, and it struck me as a large and complicated industry. You've got the cold chain, you've got variability in product, you've got complex customers, you've got shelf life. There are a lot of things to manage, and getting them all to line up in a way that delivers that value proposition is a challenge, but if you get it right it's an important thing. So it really fed my desire to solve problems.

Meetingplace: Where is Ruprecht positioned now in the meat space?

LEBOVICH: They've become much larger. We launched something called Sommers Organic. In 2004, I had seen that the organic space was tiny but growing quickly. We were the first player to have national distribution in the organic beef space. And it also exposed me to international supply because our supply was all South American. So it got me thinking about the industry beyond the United States.

Meetingplace: What convinced you to begin your own business in the beef industry, and why grass-fed?

LEBOVICH: I learned a lot about the consumer in what I was doing with Sommers Organic. Consumers were placing great value on things like where animals are raised, how animals are raised, how they are treated, what they ate, what is their nutritional value. I learned consumers also wanted taste. I knew that we needed to solve both those things. First, you have to deliver a good eating experience. Secondly, you have to deliver on what we describe as 'permission factors' [like] ... no hormones, no antibiotics, humane animal treatment. If you can check the box of a high-quality eating experience, and then check the box of permission, it really is the bulls-eye of what the premium consumer wants.

And I knew that in order to build that business we would have to start with a blank sheet of paper, because it's a consumer business. That means that you work from the consumer backwards and the consumer basically sits at the epicenter of every decision you make in this business every day. Whereas, traditionally meat companies have had more of a supply-chain mindset where you're pushing product on the market versus trying to create demand and pull them in. We're in



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“Historically, grass-fed has *struggled to deliver* on its promises.”

the create-demand-pull business, which is a different business model.

Meatingplace: What have you found to be the most difficult in terms of growing a business in that particular channel?

LEBOVICH: We're a different business model. Early on, *Supermarket News* named us one of the top 25 disruptors in retail. What you don't realize is that disruption, if you will, is hard. People tend to be happy with things the way they are. Disruption is risky, and there are challenges to bringing a different business model to a category that hasn't had one in a long time. Compared to other categories — snacks, beverages, etcetera — where innovation is more the norm... the meat category hasn't progressed as much. If you look at the retail category in meat and you took a picture of it 50 years ago and took one today and compared them, I don't know how markedly differently they would look. There have been some changes, but not nearly as dramatic as other sections of the store. So I think

that's a function of the culture. Trying to introduce something new into a culture that is happy with the way it's doing business can be hard.

Meatingplace: What would you say is the state of the grass-fed/-finished market right now?

LEBOVICH: There's been ... fairly modest growth, in my opinion. When we look at the category, according to Nielsen data, it's about 3 percent year-over-year growth in terms of dollar sales. That would be OK if it wasn't the result of 23 percent growth in points of distribution. What that means to me is that the dollars per points of distribution were negative, and that's not a positive. I think what grass-fed is attempting to address is the health-seeking consumer, and that represents a small percentage of the overall category. The opportunity is really about taste first with permission. That's a much larger segment.

I think what has happened to date is, to the extent that the grass-fed product



hasn't met the consumer's expectations, consumers don't repeat purchases and you end up exhausting the universe of potential triers, and then your market is mature. Because there has been so much variability in the quality of product, the number of consumers who are willing to accept the experience compromise for grass-fed is small and kind of settled. In order to make it much bigger, it's going to have to address the quality of the product. ... Historically, grass-fed has struggled to deliver on its promises.

Fortunately for beef, beef is probably the protein that consumers celebrate the most. ... That's why they eat it. You have to be able to meet their eating experience expectations, and if you can also give them permission to have it, then you have something pretty interesting. ... Consumers want great taste that they feel good about choosing versus great taste they feel guilty about. For a long time now I think consumers have felt guilty about eating beef, but

they want to, so you have to create a platform for them to be able to make the choices they want to make.

Meatingplace: How would explain your business model and how it's different from competitors?

LEBOVICH: It's different literally from its inception. We're going to be a consumer company. We're going to start with an understanding of the consumer, first and foremost, and then we're going to build this business with that understanding. So products, packaging, supply chain, people, customers, different business partners — that whole ecosystem is different. We invest in building demand. We invest in category insights. We don't view ourselves as a meat company at all. We are a consumer products company that happens to be competing in the meat category today.

Meatingplace: PRE Brands was named the fastest-growing brand in beef in 2016 and 2017, according to Nielsen Perishables Group data, and had 460 percent

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year-over-year growth. To what would you attribute the growth of PRE Brands?

LEBOVICH: I think that consumers are increasingly looking for premium options. So we're a fit with consumers, and we invest in building demand. We actually invest in telling people, and then the product quality speaks for itself and we see repeat (business) and loyalty. The premium, better-for-you space is growing, and I don't think it's going away soon.

It's more of a niche, and we're trying to become the leading player within that. Today the competitive landscape is grain-fed versus grass-fed, and we're trying to create this category where it's taste and permission, where grass-fed is an attribute; so grass-fed isn't *the* reason, it's *a* reason.

Meatingplace: How do you source your beef, why do you source it that way, and how do you process and package it?

LEBOVICH: Our supply chain is international. Because we're trying to sell for taste, we wanted to make sure that we have as big of a funnel of potential supply as we could. Something that a lot of people don't even realize is that the global standard for beef is grass-fed. Outside [North America], grass-fed is the predominant production system. And there are varying qualities, but it's not a commodity like in the U.S. where you have Prime, Choice, Select or no-roll and from piece to piece it's pretty much the same thing. Grass-fed is a little different. Two animals side by side in the pasture will deliver different eating experiences, and you can use science to determine which of those eating experiences you want.

So we came at this from the perspective of, let's identify a big funnel of supply, let's use science to identify the kind of

“
I went from
evaluating acquisition
opportunities to
running a USDA
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*It's a steep
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”

eating experience we want, and then go to suppliers and tell them this is what our consumers want. We work with suppliers in New Zealand and Australia with access to the right cattle who can deliver what we want. We import the product over ocean container — it is chilled product — and then we process it in the Chicago area under our supervision, and then we ship it in trucks to retailers.

Meatingplace: Talk about your new direct-to-consumer channel. What benefits does that offer to your business?

LEBOVICH: What really drove that initiative was, we were doing all this demand creation and finding that the level of consumer demand was growing more quickly than the distribution we had. We would be doing events in Texas and California and people would ask us, 'Where can we buy you?' and we didn't have that

option. Now we can give them that option. It gets us closer to the consumer.

Meatingplace: Why are you certain your grassfed company will succeed while others in the field will fail under current market conditions?

LEBOVICH: If we just focus on giving consumers what they want on their terms, that's a pretty good path to a successful business. For me it's making sure we maintain that focus. I can't control market conditions. I can't control consumer preference.

Meatingplace: What prospects are there for the grass-fed niche to be scaled up? How do you envision that happening?

LEBOVICH: To the extent that grass-fed can address consumer demand, that will create scale on the demand side, and historically supply has figured out a way to scale to demand. If people can deliver

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great-tasting product that has all the health benefits and those permission attributes we talk about, then it can become a large segment.

Meatingplace: What are some of the obstacles?

LEBOVICH: Grass-fed is subject to environmental conditions, and I don't know how many places we have in the U.S. that can successfully scale grass-fed. We are the best producer by far of grain-fed animal protein, but we are a disadvantaged producer of grass-fed beef. It relies on great land, great climate, rich soil and plentiful grass to have the right types of cattle. Environment really matters, labor costs

matter, scale matters. So when you go across the world, to places like Australia and New Zealand, a lot of the challenges that need to be solved from a supply chain perspective they've already solved, and they've done that at scale. They are just effective and economically efficient producers of grass-fed beef. We may be able get there over time, but the challenge is we're really good at grain-fed and that is still the dominant production system in U.S. I don't



Check out our recent profile on the grass-fed beef industry here: meatm.ag/grass-fed

know that the incentives are here to drive people away from what is already working.

Meatingplace: What consumer trends are driving your business decisions today?

LEBOVICH: The call for more trust and transparency is getting strong. The bell is just ringing louder, and I think those who are listening to that will be successful and those who are trying to get consumers to want what they have will be less successful.

Meatingplace: Are there other market channels or perhaps some untapped opportunities that you would like to explore?

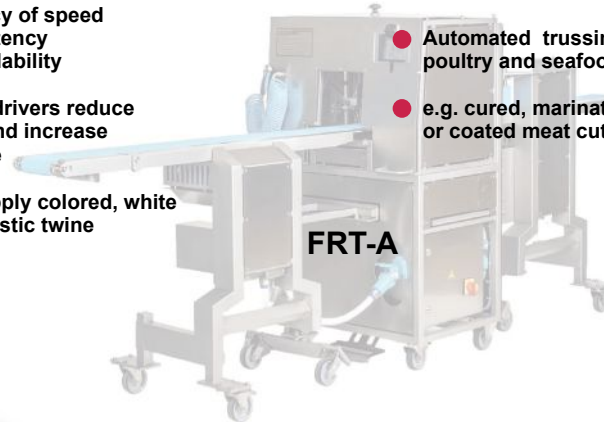
LEBOVICH: We've been asked by consumers, by customers, if we intend to go into other segments. I would say that beef is a large business, the largest category in grocery. And it's complicated, so that's really our focus. But ... as a consumer business, we are going to go where consumers are pulling us, and



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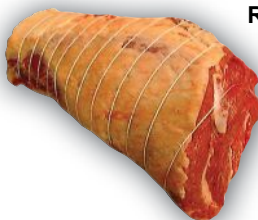
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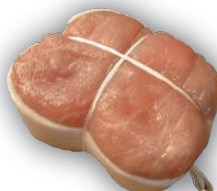


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to the extent that they're pulling us in a direction of doing something else, we'll look at it. It wouldn't shock me if over time we were in other segments, [but] we don't have any immediate plans to enter other segments.

Meatingplace: When you say other segments, are you talking about protein?

LEBOVICH: I think the brand packaging can be applied to other proteins. I could see it in seafood. I could see it in produce. The big consumer goods companies who are getting really challenged in the center of the store as consumers move away from traditional packaged process goods are looking at ways to address the perimeter, and they need it to be done in a business model that they understand, so we fit that.

Meatingplace: If you look not only at grass-fed but also at the beef industry as a whole, where do you think there is the biggest room for improvement in how it markets beef?

LEBOVICH: I think clarity of communication is important. In this industry there are a lot of messages, and because there are a lot of messages it creates confusion. And people typically don't buy when they're confused. I can go from one grocery store to another and look at the same piece of meat in each one, and one is going to be called something different than the other. [Companies should] invest in helping consumers better understand why they should buy it and how it can be used.

The other piece is there often is a misunderstanding about what brands are. To me, brands are business models; it's not just the name on the package, it's every aspect of the business that serves the needs of that brand.... You can't be a supply-chain type company and then just put a brand on a label. Ultimately, brand equity is a function of the relationship that a consumer has

with a product or a service, and that is a function of having their expectations met over and over again. That requires a level of discipline ... and I don't know that there

are too many companies that are set up to do that well. That's why we started this company from scratch. We've set ourselves up to be able to do that well.



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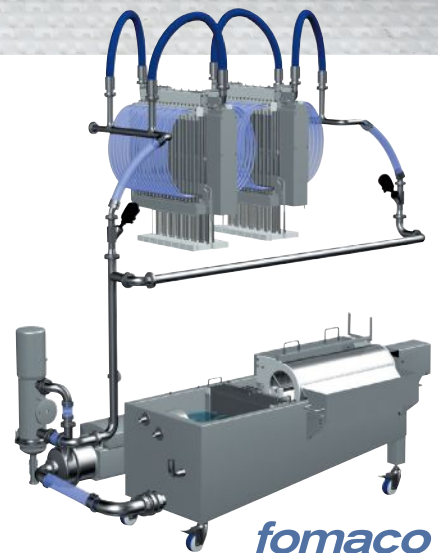
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Of the meat quality attributes most desired by consumers, tenderness ranks at the top, along with juiciness and flavor. Although these attributes together deliver the best dining experience — a palatability trifecta — one bite of tough meat is a mealtime deal-breaker, even if moist and flavorful. In this month's Meat Tech we provide processors with some technological tips and cost-effective best practices for enhancing product tenderness.

THE BEST MARINATION TECHNIQUES: ADDING FLAVOR, COLOR AND TENDERNESS TO POULTRY PRODUCTS

by **Christine Alvarado, Ph.D., professor, Texas A&M University**

Poultry processing plants commonly marinate whole birds, breast meat and other parts because it adds value to the product by improving yield and product quality, including tenderness, juiciness and flavor. Marinades are incorporated into meat by tumbling, blending and injection but each method has its pros and cons, especially when it comes to tenderization.

With current early deboning practices designed for production efficiency, marination is a commonly used tenderization method. When added to poultry meat, salt and phosphates both have a tenderizing effect due to the increased dispersion of ions into

the muscle structure. That, in turn, causes increased water uptake and subsequent increased moisture content of the cooked meat, providing enhanced tenderness and juiciness. However, early deboning or tumbling can result in toughness.

A combination system of injection followed by tumbling in early deboned meat may improve tenderness and marination yield.

Combining the proper method with the right ingredients can lead to increased yield and optimal tenderness most appealing to consumers.



To read the entire article, visit meatm.ag/marinatepoultry

AMSA EXCLUSIVE: WHEN MEAT MEETS MATH — PREDICTIVE MODELING TO DETERMINE SAFE COOKING TIMES OF TENDERIZED BEEF STEAKS

by **Joyjit Saha, Divya Jaroni, Ravi Jadeja and Jacob Nelson, professors, Robert M. Kerr Food and Agricultural Products Center and Department of Animal Science, Oklahoma State University**

Mechanical tenderization of beef, deemed comparatively better than conventional aging particularly when applied to unacceptably tough cuts, is a vital step in reducing cooking time and increasing the flavor and mouthfeel of meat. However, this technology, which involves blade/needle piercing into the meat, can lead to increased transfer of surface bacteria into sterile deep tissue.

USDA FSIS guidelines require validation of safe cooking times but determination of those times and the degree of doneness for individual steak cuts of

different sizes and weights is tedious and expensive.

In this study, Oklahoma State University researchers used predictive mathematical modeling to determine safe cooking times of various steak cuts. The results indicate that simple math could prove to be a powerful and concise way to simulate real-time scenarios without repeating costly experiments.



To read the entire article, visit meatm.ag/meatmath

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HOW TO ENHANCE BEEF TENDERNESS THROUGH APPLIED INJECTION TECHNOLOGIES

by Robert Maddock, PhD, associate professor, animal sciences, North Dakota State University

Fresh meat palatability is affected by tenderness, juiciness and flavor, all of which impact overall desirability in different ways. However, even in properly prepared beef, processors frequently find that variations in tenderness pose a real challenge to achieving the highest quality final product. Protein tenderness and background tenderness, which involve muscle fibers and connective tissue, respectively, are influenced by a range of factors, including aging, differences between muscles and enzyme action, and live animal dynamics such as animal age and nutritional status.

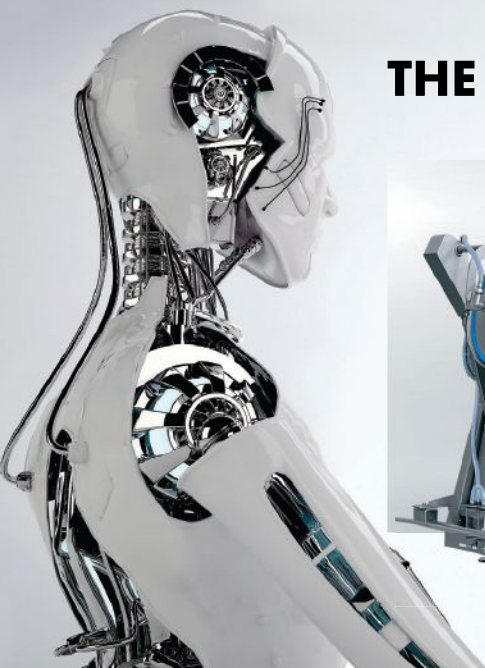
Fortunately, there are several injection technologies that can be used to reduce variation and enhance fresh beef tenderness and

other palatability traits. The most commonly used are either a simple brine composed of water, salt and a phosphate, or the addition of an ingredient such as calcium or a tropical fruit enzyme. Less common but shown to be effective is the injection of fat into whole muscle cuts to mimic marbling. Finally, there is a proprietary system that alters the pH of the meat to improve tenderness.

When considering developing and producing injected beef, processors need to know their marketing goals when choosing an injection application, due to potential labeling and food safety constraints.



To read the entire article, meatm.ag/beefinject



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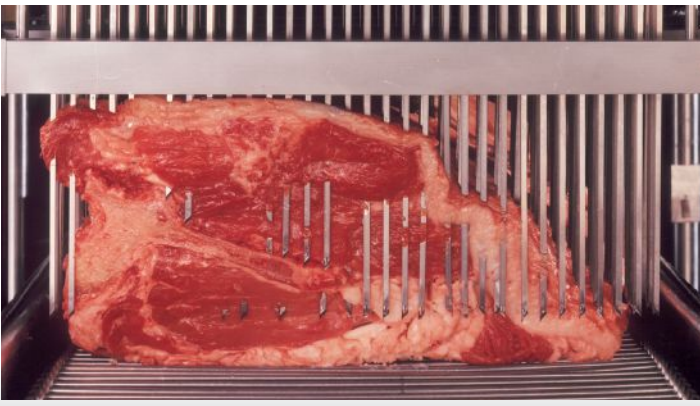


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FOOD *ff* FOCUS

BARBECUE



Fruit flavors, a taste of international flair or regional favorites — go beyond 'plain, ol' American barbecue' flavors.

by Ed Finkel, contributing editor

American diners continue to explore barbecue in all its forms, trying out new cuts of meat, flavors and regional and ethnic styles, as well as new ways of grilling and smoking. Barbecue restaurants are going beyond the American regional selling points and becoming more internationally influenced.

Plain ol' American

barbecue sauce is extremely familiar to restaurant-goers, so foodservice operators need to branch out, says Mike Kostyo, senior publications manager at Datassential. "Fruit-based BBQ sauces like blueberry or peach BBQ sauce are trending, and we're also seeing BBQ sauces that use interesting sweeteners like maple, molas-

ses, hot honey or even craft soda," he says.

Says National Cattlemen's Beef Association's executive chef, Dave Zino, "It's not just barbecue sauce. It's honey garlic barbecue, bourbon-infused barbecue, some of those blendings of flavor to give you that little bit of edge."

Five years ago, Texas barbecue was mostly only available

in Texas, says blogger and author Meathead Goldwyn. "And now it's everywhere," he says. "We're seeing places in Chicago that have Memphis ribs, Texas brisket, Kansas City pork butt. And it's not just the traditional regions, but we're seeing global flavors move in."

Smithfield Foods has noticed strong growth in "competi-

tion” cuts like pork ribs, pork butts and shoulders, brisket and chicken thighs, which rose 2.3 percent in dollar sales in 2017, according to Nielsen figures the company cited. These cuts “are ... no longer reserved for the pitmaster pros,” says Emily Detwiler, director of fresh pork marketing.

Barbecue sauces and rubs, long dominated by a handful of big brands but more recently joined by marinades tied to specific pit-masters, are widely sold, even at gas stations and rest stops, says Daniel Vaughn, barbecue editor at *Texas Monthly* magazine and author of “The Prophets of Smoked Meat.” “The star power of the pit master ... makes a difference on store shelves,” he says.

And consumers continue to be enticed by what pitmasters have to offer. Gold-

wyn, who is a blogger at Amazingribs.com and author of “Meat-head: The Science of Great Barbecue and Grilling,” sees new barbecue spots “coming up like mushrooms after a thunderstorm,” he says, “kind of like brew pubs were a few years ago. Some of them are connected to brew pubs.”

Boundaries between regions and styles are coming down, and the old rules are melting away, Goldwyn says. “Barbecue chefs often say, ‘You can’t do that. That’s not traditional,’ he says. “They have all these artificial rules. To see them play with shrimp, and Asian flavors — that’s a high wall for them to climb.”

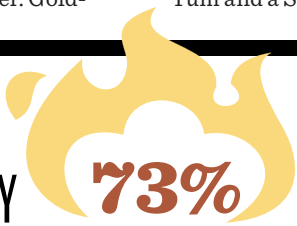
On the international side, “Southern Belly BBQ, in South Carolina, has seven house-made sauces, including the Asian-inspired Yum Yum and a South

American/Afro-Caribbean Asada,” Kostyo says. “Korean BBQ has also been growing on menus ... like the Korean BBQ Burger at Carl’s Jr.”

Moroccan, Indian and Latin American flavors are on the grill alongside Korean, says Steven Raichlen, author of the soon-to-be-released “Project Fire” and host of an upcoming PBS show by the same time. “I’m seeing ... use of Peruvian peppers creeping into mainstream flavors,” he says. “Sesame, soy and sugar — the Korean triad — is also popular.”

And the exchange goes both ways: Vaughn has visited Texas-style barbecue joints in Antwerp, Brussels and Madrid. “The idea of barbecue regionalism, sharing ideas in a bounded region, is kind of gone because of the way we share information these days,” he says.

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Smithfield has launched a line of Dry-Seasoned Fresh Pork Chops ready to throw on the grill for any occasion. They come in four flavors: Roasted Garlic & Herb, Hickory Smoked Brown Sugar, Original Recipe, and Steakhouse Seasoned. The company also offers the Smithfield Dry Seasoned Ribs in full and half racks, pre-seasoned in Carolina, Memphis and Kansas City barbecue flavors.



FOODfocus



Menus BRIMMING WITH barbecue

On the foodservice side, barbecue appears to be seeing steady growth. According to figures from Technomic's MenuMonitor, powered by Ignite, the penetration of "barbecued" as a preparation method has increased by 7.2 percent over the past five years. The most common dishes include barbecued chicken, chicken pizza, chicken strips and nuggets, and chicken wings,

Technomic says.

The National Cattlemen's Beef Association cites Technomic figures showing that brisket sales at foodservice rose to \$343 million in 2017 from \$292 million in 2016, while boneless country-style ribs were up to \$58 million from \$36 million in the same period, says Dave Zino, executive chef at NCBA.

The National Pork

Board continues to see creative uses for pulled pork, including as value-adds to dishes like mac-and-cheese, queso chips and even a grilled cheese pulled pork sandwich at Buffalo Wild Wings, says Patrick Fleming, director of retail marketing. Restaurants like Chili's and Applebee's have rededicated themselves to ribs, and the fourth quarter of 2017 saw strong year-over-year

growth, with back ribs up 16.9 percent in volume and spare ribs up 9.3 percent. "We've seen more expansion year-round," he says. "Ribs for Christmas? Who knows?"

Thin-cut pork chops and steaks have become popular among chefs because they absorb more smoke and fire flavor and can be more economical, says Steven Raichlen, author and TV host. But he's also

seen "really big stuff" like barbecued beef plate ribs.

Daniel Vaughn, barbecue editor at *Texas Monthly*, has seen an increase in turkey legs offered at barbecue joints, perhaps as a healthier alternative to beef and pork. "Certainly more turkey than chicken," he says. "It has to do with how much better it holds, and how much easier it is to slice."



Barbecue's popularity hasn't translated into retail sales of value-added meats. The overall value-added barbecue category was up just 0.3 percent in sales in 2017; chicken jumped 27 percent, while beef grew 9.9 percent but is only 1.2 percent of the category.

"Barbecue flavor is really not doing that hot," says Meagan Nelson, associate director of fresh at Nielsen. "There's been marginal growth in the meat department, and a lot of that has come from chicken," she says. "A lot of times, when you're going to do a brisket, you're not going to get it already done. Brisket is not a cheap cut. Whereas chicken is quick, easy to cook, and has a healthier allure."

Fully cooked products sell more briskly, Nelson says, with fully cooked pork comprising nearly half of all barbecue sales in the meat department, although that figure was down 1.2 percent in 2017.

In the deli department, barbecue value-added has fared even worse than the meat department, Nelson says, yet there has been growth in certain flavorings. "It's a juxtaposition of people wanting those flavors, and in general barbecue not seeming to hit well right now," she says. "It's not just, 'Hey, this is barbecue.' It's Memphis, or Korean."

Nielsen doesn't track how much fresh meat consumers buy and use for barbecue. But Dave Zino, executive chef at the National Cattlemen's Beef Association, can take some educated guesses: Beef ribs were up 7.2 percent in sales, 8.2 percent in pounds, between 2016 and 2017, with brisket up 1.2 percent in sales and 2.0 percent in pounds, according to Freshlook data.



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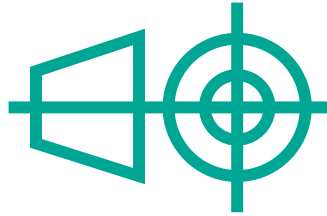
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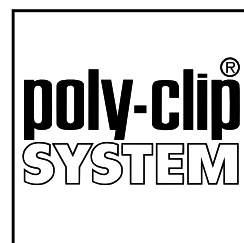
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BACKYARD, PROFESSIONAL CHEFS branch out

Barbecue used to mean charcoal on a kettle grill or low-and-slow smoking. It still can, but the cooking methodology has branched out along with the flavors and ethnic influences.

Patrick Fleming, director of retail marketing at the National Pork Board, is excited by new cooking technology that allows people to experiment. “The insta-pot and the

pre-cooking or par-cooking of ribs shorten the time they have on the grill,” he says. “Even shoulders ... can use a crock pot, and you can make it easily, economically, and it’s almost impossible to screw up.”

Blogger and author Meat-head Goldwyn sees sous vide being used more often in commercial restaurants, particularly in settings like



a hotel convention dining room where they need 300 medium-rare filet mignons for lunch. “The only way to do that is sous vide – start in the bath and then move to the griddle,” he says. “Everybody gets a perfectly grilled filet mignon.”

Goldwyn is also intrigued by the Internet-enabled devices that help backyard cooks be more precise. “You can use a smartphone to manage your smoker,” he says. “You can go to work downtown, set up your smoker in your backyard in the

suburbs, fire it up, and check the temperature of your meat on your smartphone.”

In restaurants, “The trend is certainly toward all-wood-fired smokers, rather than using gas cookers,” says Daniel Vaughn, barbecue editor at *Texas Monthly*.



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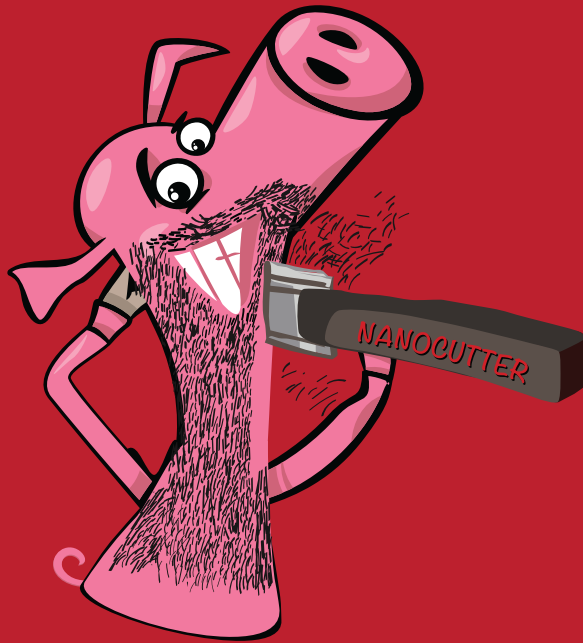
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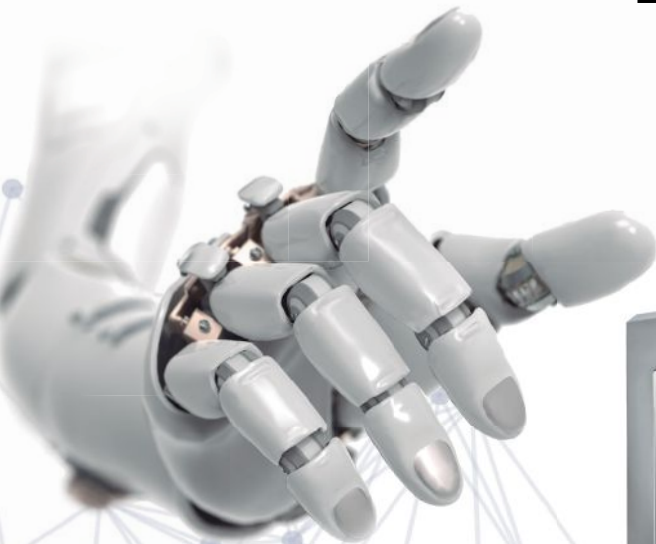


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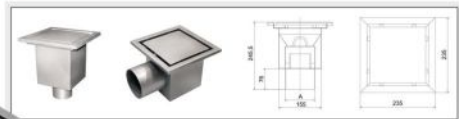
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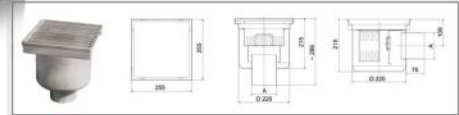


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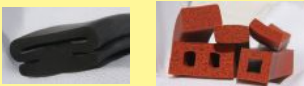
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break TIME

MELVIN C. "HUNTER" HUNT



On safari



“ THEY ... ENJOYED A PEACEFUL JOURNEY OVER THE MAASAI MARA PLAIN. ”

The distinguished food scientist Melvin C. "Hunter" Hunt enjoys shooting animals but, contrary to his name, he

chases them down with a Nikon, not a Browning.

Hunt has used his photography skills in Africa on eight different safaris, three since he retired from Kansas State University in 2010 (where he remains Professor Emeritus). The safari itch has taken him and his wife Rae Jean to Zimbabwe, Zambia and Namibia and several visits to Kenya and Tanzania. They plan to return to Zambia next year.

The couple signed up for their first excursion in 2000 with a Kansas-based company that featured a hot air balloon trip in Kenya. They boarded the balloon at 4 a.m. and enjoyed a peaceful journey over the Maasai Mara plain. They celebrated their 50th wedding anniversary three years ago in Zambia on a dry riverbed branch of the Zambezi River. The tour guide had arranged

for food and champagne. "We had singing and dancing with our group," Hunt recalled. "There were very few clouds that evening, and the stars of the Southern Cross were easy to spot."

Hunt traces his interest in photography to an early stint as a research chemist at Tennessee Eastman Co., then a division of Eastman Kodak. These days he shoots with a digital camera. "You just have to be prepared to start shooting with multiple shutters and hope one looks good and in reasonable focus," he said. "It all can happen so fast that if you try to plan the exposure and framing you don't get any pictures."



To see more photos from Hunt's safari trips, visit meatm.ag/safariphotos

His fondest memories: Baobab trees, Cape buffalo, a baby giraffe and sand dunes in Namibia. An extraordinary moment was an elephant funeral where 15 to 20 elephants lined up to pay their respects to a fallen giant. "Each elephant approached the carcass and tapped it with his or her trunk," Hunt recalled. "Even the Maasai watching in the vans had tears flowing and what was a photographic opportunity soon became a pause of silence."

#MPBreaktime is Meatingplace's new spotlight on our readers' hobbies, passions and avocations. Do you know somebody who does something with their free time that's just as interesting as their work in the meat industry? Send us a tip at newseditors@meatingplace.com!

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