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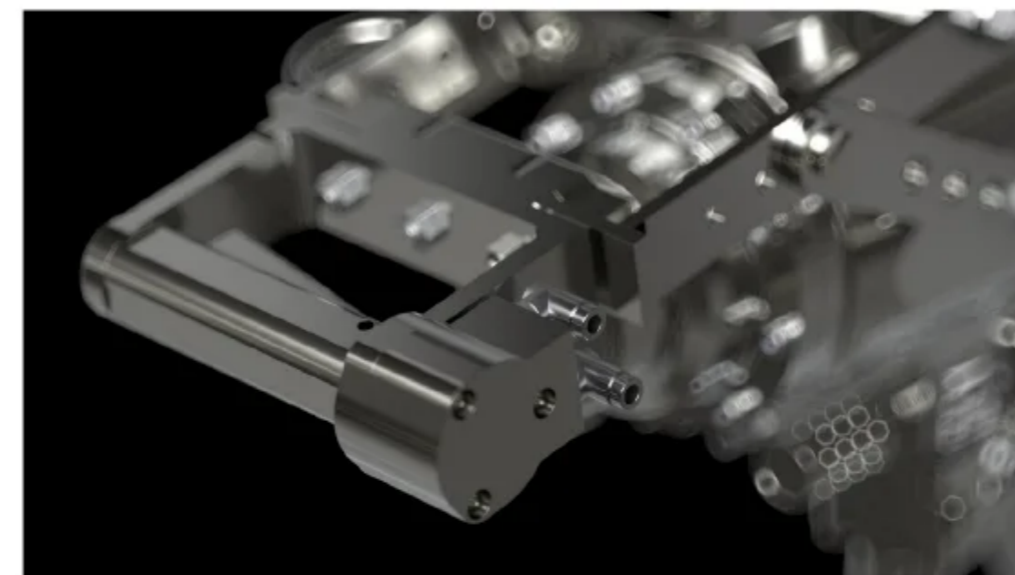
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MAY 2023 / VOLUME 236 / ISSUE 5



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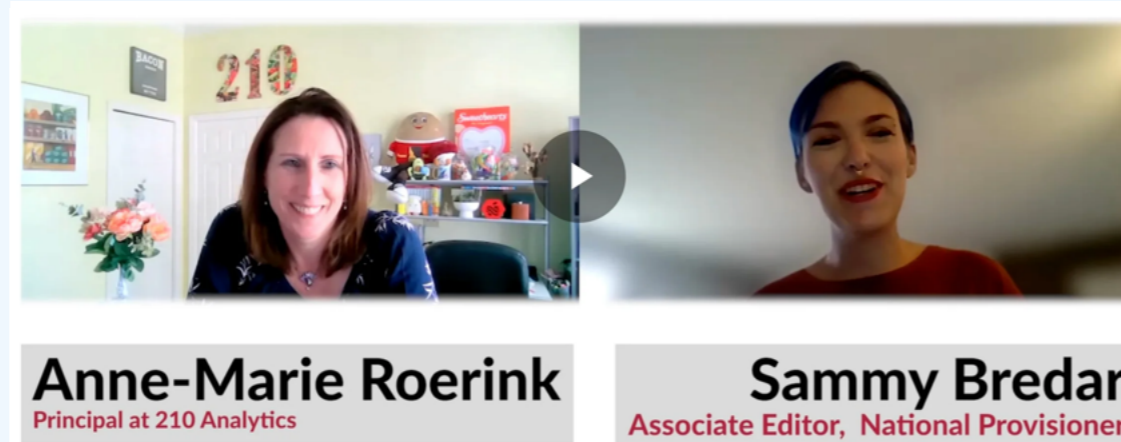
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Anne-Marie Roerink
Principal at 210 Analytics

Sammy Bredar
Associate Editor, National Provisioner

THE PRINCIPAL OF 210 ANALYTICS SITS DOWN WITH THE NATIONAL PROVISIONER TO FOLLOW UP ON THE POWER OF MEAT

Anne-Marie Roerink shares her industry insights following this year's Annual Meat Conference.

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TOP-VIEWED NEW CONSUMER PRODUCTS:

1. Burger King brings back Melts and introduces Spicy Chicken Fries
2. Culver's reveals new New Smokehouse BBQ Cheddar Sandwich on April 10
3. Jimmy John's introduces new Caprese Salami Pesto Sandwich, available for a limited time
4. Hormel Foods launches first-ever Fontanini Cup & Char Sausage
5. Panera is launching a new salad and bringing back the Strawberry Poppyseed Salad



MOST-POPULAR FEATURES:

1. Seafood Report 2023: Supply challenges and market opportunities
2. Creekstone Farms hosts Cure Camp in New Orleans
3. The Burger Report 2023: Getting creative to meet market needs
4. Poultry Report 2023: Innovation driving sales growth
5. The Power of Meat: Meat stays on top



1. Episode 152: Vice President of Marketing at Nestlé Professional, Fleur Veldhoven, discusses Nestlé's new plant-based dining program.
2. Episode 151: Consumer trends with Soumya Nair of The Kerry Group
3. Episode 150: President of Shucks Maine Lobster talks HPP, consumer trends and more
4. Episode 149: Maximizing energy efficiency
5. Episode 148: Heidi Meyer discusses consumer research and Pound of Ground Crumbles product

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SEE YOU AT THE TOP

This year's Top 100 list finds some of the biggest names in the meat and poultry business continuing the past couple of years of strong growth. And while recent retail sales data suggest that hot streak may be beginning to cool, I fully expect that a year from now we'll be seeing plenty of companies achieving record revenue performance.

In this issue's Natural & Organic Special Report, learn how trendsetting companies such as Tyson Foods, Spring Lake Ranch, and Verde Farms are finding – and creating – opportunity in this category.

Also, check out AMSA's preview of the upcoming Reciprocal Meat Conference, which is marking its 76th year of educating meat industry professionals while building professional and personal relationships that last a lifetime.



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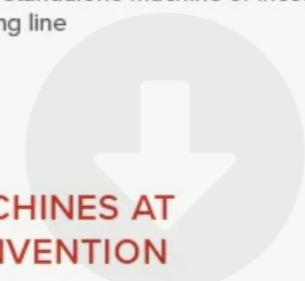
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CLEAN LABEL CONTINUES TO GROW

CHARQUI JERKY CO., COUNTRY ARCHER PROVISIONS AND CATTANEO BROS. DISCUSS THEIR COMPANY HISTORIES AND MOST POPULAR MEAT SNACK OFFERINGS.

BY SAMMY BREDAR
ASSOCIATE EDITOR

Clean label meat snacks are taking off. Charqui Jerky Co., Country Archer Provisions and Cattaneo Bros. discuss their company histories and most popular meat snack offerings.

Matt Salts, president of Charqui Jerky Co., first got started in the meat snacks business when he was driving to Michigan. On his way there, he noticed a sign for a beef jerky store. "I was blown away by the store that had 1,200-1,500 square feet of retail space that was nothing but beef jerky," Salts said.

After seeing the popularity of the jerky, Salts decided to explore this venture on his own. He noticed the growth of the jerky category, but he also observed a market need for a clean product made from natural ingredients.



Country Archer's new Zero-Sugar Smoked Sausages are available in Original and Fuego
Photo credit: Country Archer Provisions

Salts said that their Bloody Mary flavor, which they call Sunday Hangover, has been a hit at shows.

The company has always listened to their customers, Salts said, and their customers craved consistency in the Charqui Jerky Co. products.

"We feel like our flavor is unmatched for the flavor profiles we do ... Our goal is to have that flavor through your entire chew process," Salts said. "It's a maximum amount of flavor and it's very tender."

Salts noted that his company is not the only one making these kinds of products. "Give folks a try. Don't just try to stick with your national brand stuff," Salts said. "Reach out a little bit. There's some really good stuff."

One of these companies is Cattaneo Bros., a family-owned meat processor and manufacturer.

Katelyn Kaney, owner and CEO of Cattaneo Bros., said that her parents bought the company in the 1980s, so she grew up with the company. In 2006, Kaney began helping her father run the company, and after both of her parents passed away in 2008, Kaney took the reins of the company.

Cattaneo Bros. has four lines of beef jerky, and Kaney said that their no-sugar products are their most popular consumer products, in addition to their grass-fed offerings.

“WE FEEL LIKE OUR FLAVOR IS UNMATCHED FOR THE FLAVOR PROFILES WE DO... OUR GOAL IS TO HAVE THAT FLAVOR THROUGH YOUR ENTIRE CHEW PROCESS,” SALTS SAID. “IT’S A MAXIMUM AMOUNT OF FLAVOR AND IT’S VERY TENDER.”

The company hand-makes its jerky in smokehouses, and Kaney said that her company has always practiced this tradition. Kaney said that she believes their products have a unique flavor profile due to these methods.

Though the product does not have a very long shelf life like other brands, the products are clean and simple.

The company tries to adapt and evolve with the industry, but Kaney finds that keeping their operations rooted in tradition is beneficial for their company since their product is old-fashioned.

Country Archer Provisions is another clean-label meat snack provider. Andrew Thomas, vice president of marketing, said that their Original Beef Jerky, Zero Sugar Classic, and Hickory Smoked Turkey products are all quite popular. He said that their customers like having variety in their protein selection.

"Our Mini Beef Sticks are massively successful, with strong performance at retailers such as Costco and Amazon, where it's the #1 selling mini stick," Thomas said.

Most of the company's beef comes from Australia, he said, but they also get beef from North and South America. "Australia's grass-fed beef industry is one of the largest and most mature operations," Thomas said.

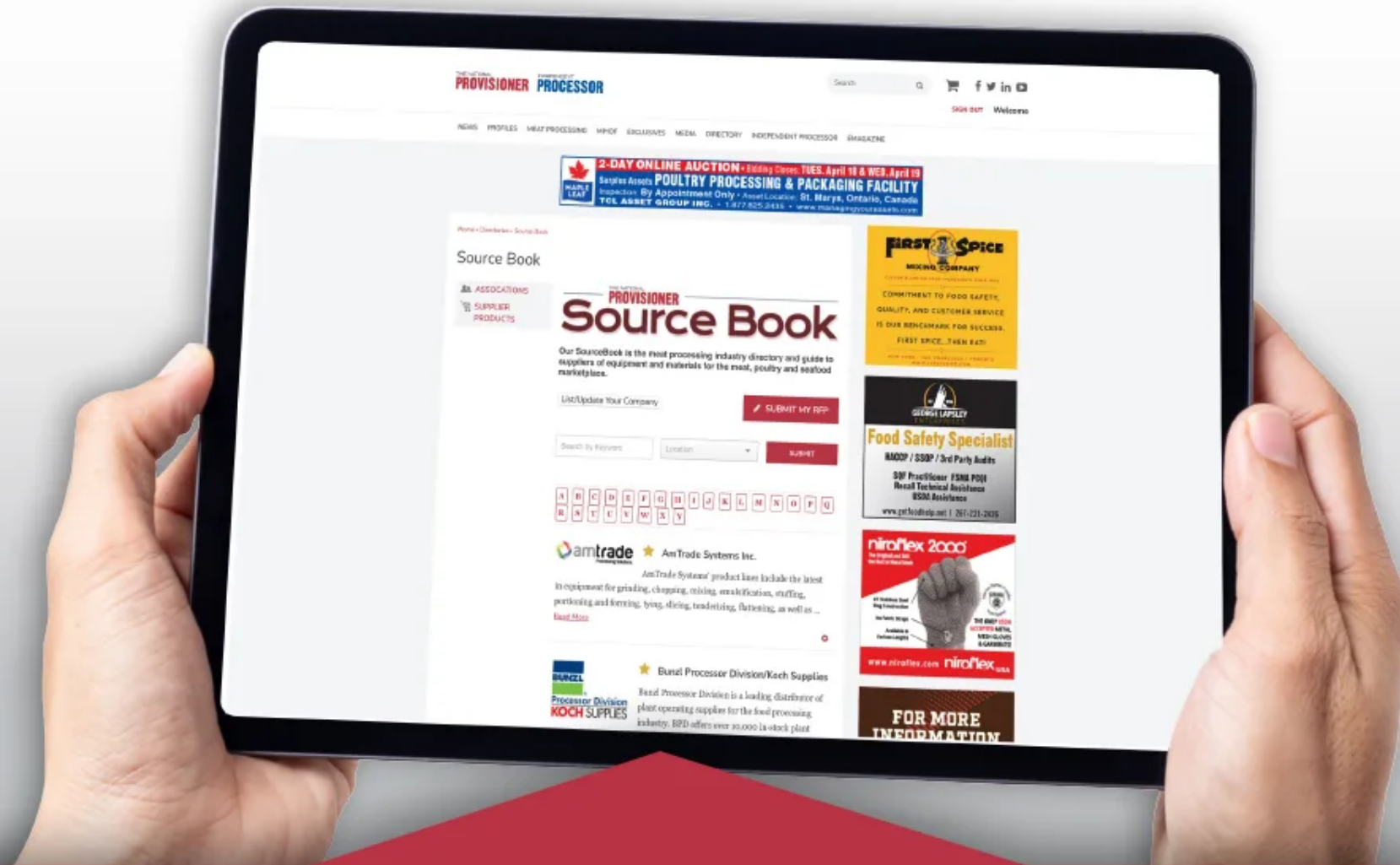
Grass-fed beef has been at the root of Country Archer Provisions' products since the beginning, he said. The company also supports regenerative farming.

"The brand provides a delicious option for the growing wave of consumers vigilant about the impact their food choices have not only on themselves, but the people, planet and animals," Thomas said. "Grass-fed beef is known to have more omega-3s compared to conventional beef, plus it's a more humane option that is safer and does not confine cattle to feedlots."

Kaney's company caters to this consumer demand for clean food and said that her company's products are generally made from a few simple ingredients. Kaney also said that her company works hard to know where their beef is coming from by collaborating with ranchers.

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CATERING TO CONSUMER DEMAND

TYSON FOODS, VERDE FARMS, SPRING LAKE RANCH AND THE AMERICAN FARMERS NETWORK DISCUSS THE CURRENT STATE AND FUTURE OF THESE CATEGORIES.

BY SAMMY BREDAR
ASSOCIATE EDITOR

Consumers care about wellness, and natural and organic products are a surefire way for producers to cater to this consumer demand. Tyson Foods, Spring Lake Ranch, the American Farmers Network and Verde Farms all discuss the current state and future of the natural and organic categories.

TYSON FOODS

Rikki Ingram, director of fresh meats marketing for Tyson Foods, said that the company always wants to know what consumers are craving.

"In the 2023 Power of Meat study, we found ... that no added hormones, no antibiotics ever, and natural, all still rank as strong priorities for claims-based meat shoppers," Ingram said.

Given this consumer priority, Ingram said Tyson launched the brand Open Prairie Natural Meats, which includes Open Prairie Natural Pork.

"When you buy Open Prairie Natural Meats, you can be sure that animal welfare is our top priority," Ingram said. "And we hold ourselves accountable with third-party auditors who ensure we are delivering on all our promises and claims."

Photo credit: Tyson Foods

Ingram mentioned the high consumer demand to know the farm-to-fork story of their foods.

Ingram said that the meat industry must do more with pork, given continuing issues with beef regarding supply and price. "We recommend that retailers segment pork by quality and production attributes ... you are expanding the appeal of pork, without limiting options," she said. "You are also catering to consumers who desire to purchase products that are minimally processed and do not include any additives or preservatives."

Ingram sees a steady future for claims-based meat. "We are seeing increasing concern regarding the welfare of hogs. The Open Prairie Natural Pork program has strict animal welfare standards in place, which help the consumer feel confident the hogs are ethically raised," she said.



The Sandhills cover nearly 20,000 square miles in north-central Nebraska and house a rich collection of more than 500 varieties of grass—The Napa of Grass. As an expert in regenerative agriculture, VP of Open Range Beef Tim Goodnight (left) optimizes grazing plans at Spring Lake Ranch to continually improve soil and grass health. Here he is joined by Nick Tarpoff, VP of procurement and supply chain. Photo credit: Spring Lake Ranch

SPRING LAKE RANCH

Marc Broccoli, CEO of Open Range Beef's Spring Lake Ranch brand, said Spring Lake Ranch found success by narrowing in on entirely organic beef.

He sees a steady future for the organic beef category.

"In 2022, for the first time, more organic grass-fed beef was sold vs. non-organic grass-fed beef," he said.

Broccoli said organic beef has stricter requirements than natural beef. "This method of beef production is not only healthier and more ethical for the animal, but better for the land and the consumer as well," Broccoli said.

He said that the Spring Lake Ranch brand is not only USDA Organic, but is also completely grass-fed. "To protect and further improve the Sandhill's rich pastureland, we've converted 80,000 acres to Organic Certified since early 2022 and implemented best-in-class regenerative cattle raising practices," Broccoli said.

Spring Lake Ranch hopes to convert more than 1 million acres of land to Certified Organic, he said.

AMERICAN FARMERS NETWORK

The American Farmers Network is a company that works to get natural and organic product offerings out to consumers, said Sanin Mirvic, president and CEO of American Farmers Network. Mirvic said that every rancher the AFN works with is natural and organic.

Due to health-related issues, Mirvic's mother started on an all-natural, organic diet, and this cured her ailments. This inspired Mirvic to get this message out to consumers.

"We wanted to get more people in America eating healthier and better foods, and found grass-fed beef to be an important and growing segment we could invest in," Mirvic said.

He said that as consumers become more concerned about the origins of their food, this category is growing.

"For the past 13 years grass-fed beef has been the fastest growing category in the entire meat business," Mirvic said. "Organic beef has grown 20-27% a year for the past 13 years as well."

Mirvic said consumers should opt for natural and organic products for health-related reasons.

"A lot of people think turning to natural or organic products means sacrificing flavor and missing out on things they grew up loving to eat," he said. "With grass-fed beef you still get to eat something you know and love, but knowing that it is better, cleaner and healthier."



CEO of Verde Farms Dana Ehrlich (left) and a farmer (right) at the farms in Uruguay
Photo credit: Verde Farms

VERDE FARMS

Dana Ehrlich is the CEO and founder of Verde Farms, an organic, 100% grass-fed, 100% pasture-raised beef brand.

Ehrlich said Verde Farms was founded with the intent to get organic, grass-fed beef out to consumers across the U.S.

"The founding principles centered on health and wellness trends, sustainable agriculture practices, environmental conservation and animal welfare considerations," he said.

After operating his brand for 18 years, Ehrlich said he has seen great growth in the organic category.

He sees that organic and natural products have a lower penetration rate in meat than in other departments. "We anticipate the organic meat sector will catch up with the rest of the store's perimeter."

The Verde Farms CEO is seeing a trend in regenerative agriculture. "This increases the productivity and profitability for the farmer which makes things more sustainable for the long term while also creating better products," Ehrlich said.

He said that the Verde brand is part of the better-for-you category. "We define better for you as no added hormones, no antibiotics, grass-fed and organic," Ehrlich said.

He said the brand is very involved in the organic category, as opposed to natural. "The natural category on the other hand is very nebulous and undefined so we try to stay away from that word and focus on using the term organic, which is extremely well defined," Ehrlich said.

Ehrlich said that consumers want organic foods to meet different needs. "Those needs include sustainable agriculture, animal welfare and health and wellness," he said.

He noted that these consumers often start purchasing organic products after significant life events, and they typically continue purchasing organic products after that.



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Town Hall: Q&A with Regulators and Advisory Groups

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THE DOWNWARD TREND DURING THE PAST FEW YEARS APPEARS TO BE CONTINUING THIS YEAR.

BY SHAWN K. STEVENS

FOOD INDUSTRY COUNSEL LLC

For more than 20 years, we have been closely tracking food product recalls and outbreaks. Over this period, numerous patterns and trends have emerged, creating new challenges and new opportunities for science and industry. Notably, as the decades have passed, we have watched in awe as industry has worked tirelessly to ensure that, with each passing year, our national meat and poultry supply becomes more safe.

As we look back at the recalls and outbreaks which have occurred over the past three decades, there have been both good and bad years. And, now, as we look back on the first full quarter of 2023, we can assess the recall data to see how industry is currently doing, and to predict how, from a food safety standpoint, the year may ultimately end.

By way of context, in 2022, there were 42 recalls of USDA-regulated products. Of those, 22 involved undeclared allergens, eight involved pathogens and nine involved foreign materials. Considering that these are agricultural products, of which meat alone totaled 53 billion pounds, the fact that there were only 42 recalls is quite impressive.

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allergen and foreign material related recalls, and would tie last year's pathogen related recalls. Again, when we are talking about the production of billions of pounds of products, these numbers are really extraordinary.

By contrast, in 2019, there were 124 recalls of USDA-regulated products. Based on a linear projection of 44 total recalls this year, that marks a precipitous drop in only four years. While the number of annual recalls has varied significantly and unpredictably over the last 20 years, there has nonetheless been a clear downward trend, especially during the past few years. That downward trend is all the more impressive when we consider the improvements in our ability to identify, track, and trace food safety issues, and foodborne illness outbreaks in particular.

Ultimately, the consistent, year-over-year decline in the number of recalls suggests that the efforts of industry to enhance safety are working exceptionally well. While it is unlikely we will ever be able to eradicate pathogens and, by extension, foodborne illness, completely, the progress we have made is nevertheless a marvel of human ingenuity.

Keep up the great work, and let's see if we can make the next three quarters even better than the first!





Photo Credit: Visit St. Paul



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BY DEIDREA MABRY
COO, AMERICAN MEAT
SCIENCE ASSOCIATION

Mark your calendars and make plans to attend the American Meat Science Association's (AMSA) 76th Reciprocal Meat Conference (RMC), June 25-28, 2023. At this premier event meat scientists from across the country will gather in St. Paul, Minnesota where they will be hosted by Hormel Foods Corporation and the University of Minnesota for an amazing celebration of friendship and research! "RMC brings together the leading scientists and technical experts in the meat industry to understand challenges, work toward solutions, and plan for the future. Best of all, students, the future of the meat industry, are there to learn from them," stated AMSA CEO, Collette Kaster. For the last 76 years this meeting has been a place for researchers, students, and industry professionals to gather and discuss research and hot topics within the meat industry.

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The opening keynote presentation "Alleviating Food Insecurity in the United States: The Critical Role of Meat," will be led by Craig Gundersen, Ph.D. the Snee Family Endowed Chair at the Baylor Collaborative on Hunger and Poverty (BCHP) and Professor in the Department of Economics at Baylor University. Dr. Gundersen will review how food insecurity rates have declined markedly since a post-Great Recession peak in 2014. A key reason for this decline is the success of our agricultural supply chains and, in particular, the meat industry. In this presentation, Dr. Gundersen will define food insecurity, give an overview of trends and differences across geography and demography, and discuss the role of the safety net against hunger, with an emphasis on the Supplemental Nutrition Assistance Program (SNAP, formerly known as the Food Stamp Program). He will conclude with some of the remaining challenges to more fully alleviating food insecurity in the United States and the roles that can be played by the meat industry.



GUNDERSEN, PH.D.

Tuesday morning will begin with a presentation on "Innovation in Poultry and Meat Processing: A Necessary Opportunity" by Doug Britton, Ph.D. Dr. Britton is a Principal Research Engineer with the Georgia Tech Research Institute and serves as the Associate Division Chief of the Intelligent Sustainable Technologies Division and Program Manager for the Agricultural Technology Research Program (ATRP) at Georgia Tech. The ATRP program is highly focused on driving transformational innovation in advanced technologies for poultry, agribusiness, and food processing. Working closely with stakeholders in academia, industry, and the public service sector, his efforts entail identifying key unmet challenges and translating them into applied, actionable research initiatives. He will share his passion about the future of poultry production and processing and the opportunities to infuse new technologies into an otherwise highly optimized system with the RMC attendees.



BRITTON, PH.D.

The final keynote session of the 2023 RMC will be one that you do not want to miss as Chef Stephen Giunta, Cargill's Global Director of Culinary, Certified Master, gives an informative keynote on "Igniting Your Fire." With over 40 years of culinary experience, ranging from the White House (yes, really) to corporate America, you will walk away inspired and ready to set your career on fire. Come find out how a career grounded in education and mentorship was the secret ingredient to his success.



STEPHEN GIUNTA

Following each morning keynote session, there will be afternoon concurrent and reciprocation sessions giving attendees the chance to view some of the cutting-edge research taking place in the meat science community. Attendees will also have a chance to hear from some of the leading experts in the industry on a variety of topics. These sessions include:

MONDAY CONCURRENT SESSIONS

- Meat Science & Human Nutrition: Better Together
- Pre- and Postnatal Stress Impact on Muscle Development and Meat Quality
- The Other 40% - Innovation in Biologics and Biomaterials

TUESDAY CONCURRENT SESSIONS

- Cell Based Protein
- *Salmonella* Pathogenicity and Public Health Risks from Meat and Poultry
- Packaging and Preservation

WEDNESDAY CONCURRENT SESSIONS

- What Direction Should the Protein Industry (Academia and Industry) Be Preparing For?
- Modern Advancements in Science and Technology in Processed Meats

WEDNESDAY HANDS-ON WORKSHOPS

- Flavor Building Blocks, From Classic to Modern Workshop
- USDA Grant Writing Workshop

Networking: From catching up with old friends to connecting with other meat science professionals, RMC will provide an amazing networking opportunity! The AMSA 76th RMC will kick off with the Welcome Reception on Sunday night at the iconic Allianz Field that is home to the Minnesota United FC of Major League Soccer. Here, attendees will have the chance to enjoy the field's beauty and amenities while catching up with old friends and meeting new colleagues. On Monday night, Harriet Island will serve as the backdrop for the annual AMSA RMC family picnic. Harriet Island is located along the banks of the Mississippi River and will provide a great panoramic view of downtown St. Paul. Harriet Island is enjoyed by many of the area locals as it is a great venue to enjoy many outdoor activities as much of the park is covered with ample green space. Attendees will enjoy various yard games and have the chance to compete in the first ever kickball tournament for our conference. Wrapping up the social events will be the AMSA RMC awards banquet which will be held at the InterContinental Saint Paul Riverfront, bringing attendees together to recognize meat science professionals for their outstanding contributions in research, education, extension, and industry outreach.



DR. MINDY BRASHEARS

Student Activities: Over the past several years RMC attendance has continued to grow, and with that the number of students that attend RMC has surpassed expectations. These students are passionate, engaged, and excited about the meat industry and what the future holds for them and their colleagues. As the student attendee numbers rise, so does their participation in the many events that take place at the annual RMC, including the undergraduate quiz bowl competition, career and networking fair, poster presentation sessions, mentor program, as well as the product development competitions. Countless hours are devoted to planning, training, and preparing for the events that will occur this June, but there is one event that these students cannot plan for in advance, the Iron Chef competition where their culinary knowledge will be put to the test.

"The AMSA planning committee has been working diligently to create a strong program focused on equipping attendees with the latest information related to science and technology in the meat industry, and while we understand the importance of providing scientific updates, we also realize the importance of personal interactions within the industry. It is, after all, our relationships that provide the best avenue for transferring information. Therefore, the meeting will also provide ample opportunities for networking and social events along with a community outreach event," stated Dr. Mindy Brashears, AMSA RMC Chair and Associate Vice President for Research, Director-International Food and Industry Excellence, Roth and Letch Family Endowed Chair for Food Safety at Texas Tech University.

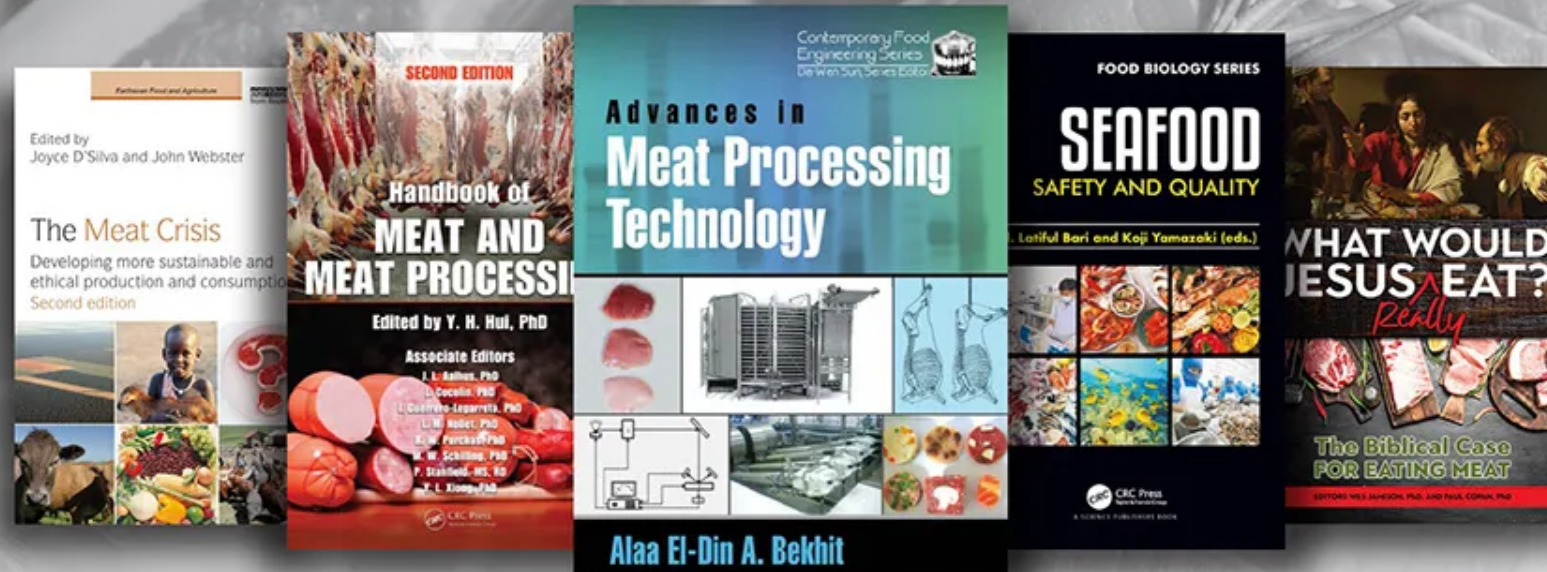
The AMSA 76th RMC has something unique for each attendee, whether it is networking with your peers, enjoying the traditional social events, or listening to the latest cutting-edge research from academic and industry experts, you are sure to find it in St. Paul, Minnesota this summer. We look forward to seeing you this June! For more details on the technical program, lodging, and to register please visit www.meatscience.org/rmc.

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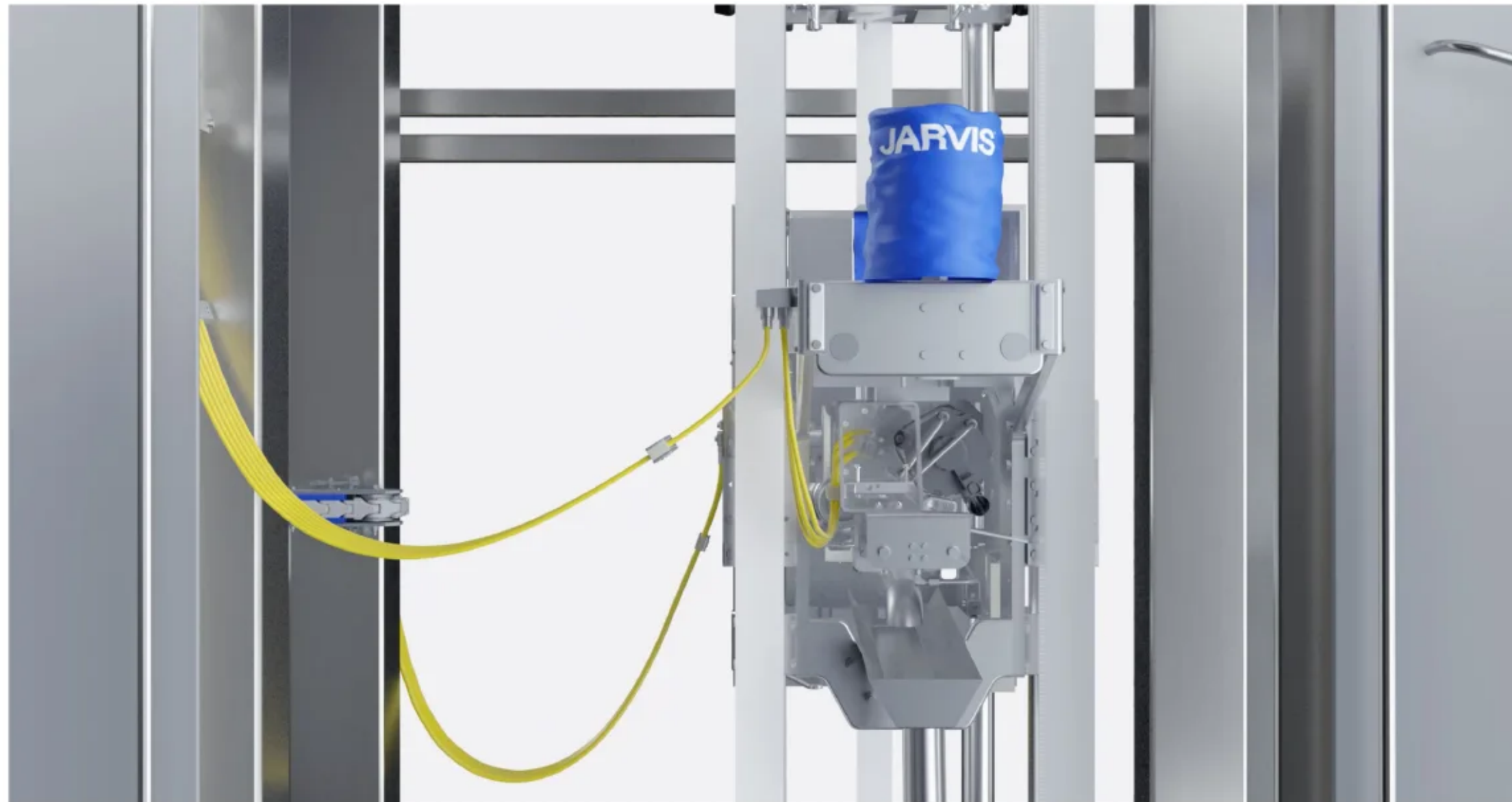
Basic Sausage Short Course	Snack Sticks Short Course
Cured Meat Short Course	Fresh Beef Short Course
Dry & Semi-Dry Sausage Short Course	Fresh Pork Short Course
Sausage & Processed Meats Short Course	HACCP Workshop
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