APRIL 2023

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THE NATIONAL PROVINCE OF EDITORIAL LEADERSHIP IN THE MEAT & POULTRY INDUSTRY

SALES PRESSURE FOR PLANT BASED

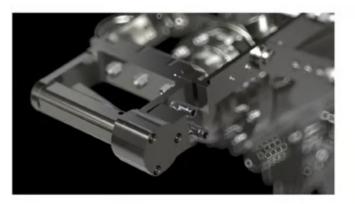
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Before the Butcher

curing, dry and wet aging, sausage making, and more — with the ultimate goal of preserving the multigenerational knowledge that underlies the crafts of butchery and curing meats.



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TOP-VIEWED NEW CONSUMER PRODUCTS:

- 1. Burger King brings back Melts and introduces Spicy Chicken Fries
- 2. Jimmy John's introduces new Caprese Salami Pesto Sandwich, available for a limited time
- 3. Hormel Foods launches first-ever Fontanini Cup & Char Sausage
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BY FRED WILKINSON

GETTIN' ALLUP IN OR GR

The U.S. is a sizeable chunk of real estate, and depending upon your latitude it may just be starting to feel like spring or it may be starting to feel like summer.

In other words - it's grilling season.

While the grill has a place in football tailgating and some other cooler-weather festivities, there's something about the smell of meat cooking on a grill that's evocative of backyard summertime fun and related family memories.



In our Summer Grilling Preview, *The National Provisioner's* Associate Editor Sammy Bredar brings us up to date on how consumer trends are driving the rollout of new grilling products that aim to create memorable eating experiences while offering consumers variety and convenience.

If burgers and brats aren't your thing, marketers of plant-based proteins are making some moves of their own to meet consumer demands in the category. Check out our Plant-Based Foods Report and learn about how food companies plan to re-energize sales in this still-trendy category.

And you won't want to miss our Wholesome Foods Processor Profile to find out how a willingness to diversify has played a role in the company's long history of growth.

FRED WILKINSON



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COVER STORY: PLANT BASED

PLANTING SEEDS OF GROWTH

FOOD MARKETERS MAINTAIN INTEREST IN PRODUCT DEVELOPMENT FOR PLANT-BASED MEAT ANALOGS DESPITE FALLING DOLLAR SALES AND VOLUME.

BY FRED WILKINSON CHIEF EDITOR

The marketplace for plant-based meat alternatives is sending mixed messages.

On one hand, retail sales for plant-based meat analogs are limp, with combined sales for refrigerated and frozen plant-based meat alternatives down 9% year over year in February 2023, according to IRI point-of-sales data. In addition to dollar losses (the category racked up \$84.8 million in sales for February), units sold and volume for meat alternatives also fell versus year-ago levels.

Annually, dollars, units and volume for combined frozen and refrigerated plant-based meat alternatives were also down versus prior year levels, IRI. Combined frozen and refrigerated plant-based meat alternative sales reached \$1.2 billion from February 2022 to February 2023, down minus 3.3% from prior-year levels. Units and volume for combined refrigerated and frozen meat alternatives also fell.

The meat case, by comparison, is faring better. Pound sales for fresh meat fell a little more than 2% year-over-year in February, which combined with mild inflation resulted in a modest dollar increase of 0.3%. Processed meat was close behind, as volume sales dropped 5.3% from February 2022 levels, which combined with inflation resulted in a year-on-year decrease of 1.5% in dollar sales. Meat products' dollar sales remain ahead of year-ago levels, but pounds are trending behind.



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Despite the plant-based meat alternative category's less-than-inspiring sales performance, new product development continues to be a priority for food marketers.

The National Restaurant Association's 2023 Food and Beverage Awards, for example, could have been called the "Plant-based Food and Beverage Award." Out of the 42 award recipients selected for menu innovation, exactly zero animal-based products made the list.

So while the current market for plant-based meat alternatives fizzles, marketers are bullish on its growth potential. Cargill is among those companies that see growth potential in the category. Melissa Machen, principal technical account manager, protein ingredients, for Cargill, and Diliara Iassonova, Cargill's innovation architect for edible oils, share some insights on the category and where it's heading.

How have supply chain challenges affected sourcing/supplying of textured soy and pea protein for use in meat analog production?

Melissa Machen: "In the plant-based meat alternative space, the availability of textured plant proteins has been challenged both by extrusion capabilities and supply. Nevertheless, it remains an exciting time, as new high-moisture extrusion methods come online, alongside existing dry extrusion processes. These capabilities will enable ingredient suppliers to get more functional performance from their extruded products, resulting in plant-based meat alternatives with better texture, firmness and bite."

PLANT PROTEINS ARE THE BACKBONES OF THESE PRODUCTS, SO FINDING THE RIGHT BOTANICAL PROTEIN SOURCE IS PARAMOUNT.

Share some thoughts on plant-based protein product development — formulation, protein selection, hydration and related issues.

Melissa Machen: "Plant proteins are the backbones of these products, so finding the right botanical protein source is paramount. There are, however, a myriad of considerations. Are there allergen considerations or label claim goals to keep in mind? Nutritionally, are there parameters you are trying to meet, either from a grams-of-protein or PDCAAS (protein digestibility corrected amino acid score) standpoint? Finally, it's important to consider the functionality of the protein. If you're aiming to mimic a conventional meat product, you'll need a texturized protein to deliver a firm bite and particle definition. If you need to add viscosity, gelling ability or want to ramp up the protein content, a protein isolate might be the appropriate option. Binding agents are also important to these formulations, and may include starches, hydrocolloids and even some plant proteins. These ingredients help hold water in and keep the product together - essential functionality for plant-based meat alternatives. We have the most experience with soy protein, and it brings a lot to the table. Nutritionally, it is considered a complete protein. It has great functionality and a well-established supply chain. It's available in a wide range of formats, from soy flour to textured options in a variety of shapes, sizes and colors, and has a great value proposition. Pea protein is another regular in plant-based meat alternative formulations. While there can be variability from one ingredient supplier to the next, our partner PURIS offers pea proteins with a distinctly clean flavor, high solubility, good emulsification and binding properties, making them easy to work with in a wide range of applications. Like soy protein, pea protein is available in both powdered and textured formats, and our offerings from PURIS provide a minimum 80% protein content. Vital wheat gluten is another good choice. Long a staple of the bakery industry, the protein-rich, plant-based ingredient is now finding its way into plant-based meat alternatives. With a 75% protein content on a dry basis, it can be a good way to get more grams of protein on the label. It also brings functional benefits to the formula, including aiding in cohesiveness and structure, assisting with water absorption and binding, and contributing much-needed firmness as plant-based meat alternatives cook. Water balance is typically one of the biggest challenges. You need enough water in the system to hydrate a texturized protein, but you still need firmness in your final texture. Too much water, and you end up with a soft, mushy product. Not enough water, and it's dry and equally undesirable. Processability is another consideration. The binder ingredients and botanical proteins can be "thick" and difficult to pump through processing equipment. You need a formula that has the right viscosity to move through processing systems, but still delivers the desired firmness in the end product. Then, there's flavor. Consumers expect a plant-based meat alternative to taste like its conventional counterpart. Most plant proteins come with inherent beany, grassy or bitter notes, but ingredient suppliers are working hard to close those gaps. On the protein processing side, new approaches are yielding plant proteins with better flavor profiles. Complementing those efforts, developers are experimenting with flavor modulators, maskers and enhancers to improve their finished formulations. Cost also factors into formulation decisions. It takes a significant amount of technology to manufacture some of these plant proteins, and many plant proteins still have nascent supply chains. But there are more established options like soy and vital wheat gluten, which can bring great value to formulations."

Diliara lassonova: "Fat plays a significant role in consumer satisfaction with meat-alternative products. It contributes to product appearance, overall flavor, spice distribution and intensity, aroma during cooking and consumption, cooking experience (how much fat releases on griddle, or water and oil on a plate from the microwave), mouthfeel, succulence and intensity of the aftertaste. Beyond its functional attributes, formulators will also consider its impact on nutritional panels and ingredient statements, which are also important to consumers. The complexity of functional targets for fat in meat-alternative solutions moved developers from mono fat systems like coconut, palm oil or even cocoa butter to multi-oil formulations created for best performance in the product. For example, in applications that require a visible fat piece, you'll need a firm particle fat, like a coconut oil chip or flake, but you may also need a liquid oil. Inclusion of liquid oils such as canola, sunflower, soybean or corn oil contribute to increased moistness, improved mouthfeel and add positive impact on the nutritional panel by decreasing saturated fat and increasing polyunsaturated fatty acids. Some developers add high stability specialty oils such as high oleic sunflower, high oleic soybean oil or high oleic canola oil, leveraging their clean flavor and oxidative stability for the best overall flavor intensity and consistency. Perhaps most exciting, a new generation of "smart fats" is coming. Cargill and start-up CUBIQ FOODS are among the companies leading this effort, as we work together to accelerate commercialization of innovative fat technologies, such as Go!Drop. This specialized technology replicates animal fat in terms of visual appearance, mouthfeel and bite, for a final product that offers improved sensory and nutritional properties when compared to plant-based meat alternatives that solely use traditional plant-based fats and oils. These advances include enhanced flavor, reduced total and saturated fats, and fewer calories."

What consumer trends (retail or foodservice) are influencing the market for plant-based proteins?

Melissa Machen: "Plant popularity continues to have a solid fan base. Many consumers perceive plant-based products as healthier – both for themselves and the planet. Mainstream experimentation, the continuing protein halo, the growing connection to sustainability and an influx of new and improved plant-based products will likely keep this trend alive for years to come. Still, these flexitarian consumers can be tough to satisfy – they've grown up loving meat, and they have specific expectations about what a burger, for example, should look and taste like, and these sensory issues have proven to be key barriers. Taste, in particular, is often the hang-up. While these products may not have to mirror their animal-based counterparts exactly, they still need to taste really good to earn repeat purchase. In addition, label considerations, nutritional factors and environmental credentials will continue to grow in importance to consumers. Fortunately, advances in ingredient technology are addressing all these concerns, paving the way for a new generation of plant-based meat alternatives."

Are plant-based meat analogs used more often for snacking products (vegan jerky, etc.) or for entrée ingredients?

Melissa Machen: "The current focus remains on entrées. Plant-based burgers, for example, have been a good space to work in because you can "build" around them with toppings to assist with flavor. The plant-based chicken-alternative space is another growing segment, especially in the nugget and strip space, as high-moisture extrusion technology enables us to deliver a much-improved finished product.

While we've seen a lot of innovation with plant-based proteins in chips, bars and sports nutrition segments, it's much less prevalent in the meat-snacking space today."

February 2023	Dollar	Change vs.	Unit	Change vs.	Volume	Change vs.
	sales	2022	sales	2022	(Ibs) sales	2022
Plant-based meat alternatives fresh and frozen combined	\$84.8M	-9.0%	14.5M	-18.8%	10.3M	-16.9%

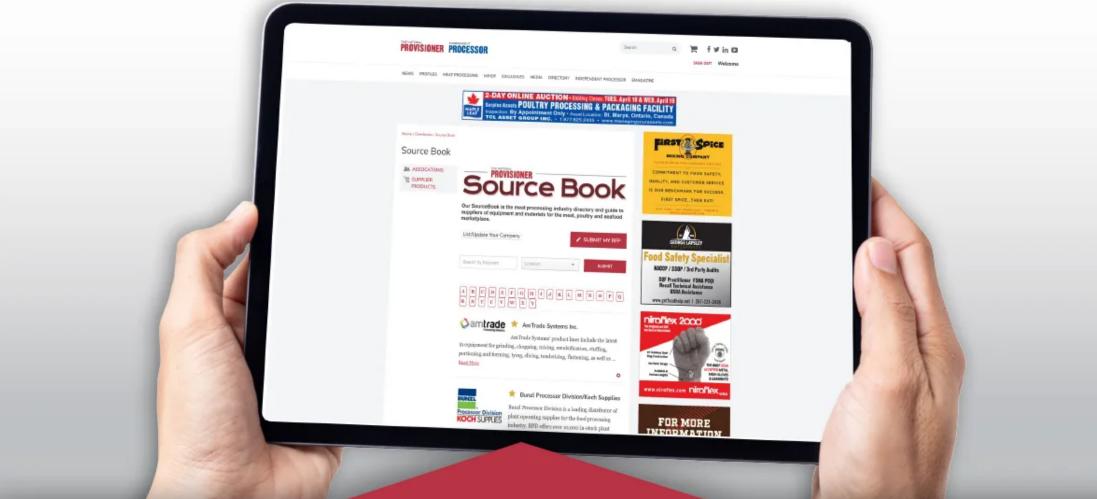
Source: IRI, Integrated Fresh, Total US, MULO

How do you see the market for plant-based proteins aligning with the larger market for proteins (beef/pork/chicken/seafood etc.)?

Melissa Machen: "Certainly, we're seeing lots of effort aimed at creating plant-based substrates that match the texture and taste of beef, pork or chicken. Early on, manufacturers focused on burgers and mince-type products, but more recently, we've begun to see brands branch out and explore ethnic opportunities, such as plant-based pork alternatives aimed at Asian dishes. There's also a much greater focus on nutrition, especially around total and saturated fats, as well as sodium levels. It's no longer enough to offer a plant-based alternative; increasingly, flexitarian consumers are looking at how these products measure up nutritionally, too. Sodium, in particular, is a challenge, as the production processes for many plant proteins add sodium to the finished ingredient. This not only results in higher sodium levels in final product, but it also makes it more challenging to add flavor systems and seasonings as the sodium level in the plant protein base is already so high. Ingredient suppliers are working hard to tackle these nutritional challenges. Cargill, for example, has partnered with CUBIQ Foods to introduce innovative fat technologies that will help brands reduce total and saturated fat levels, and through our joint venture partner PURIS, offers pea proteins with significantly lower sodium levels."

Diliara lassonova: "It's also becoming clear that despite earlier expectations that plant-based solutions would be competing and replacing animal protein volumes, plant-based solutions are actually playing a more complimentary role, diversifying vegetarian and vegan offerings and gradually gaining flexitarian consumers trust."

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PROCESSOR PROFILE

WHOLESOME COS.



BORN AND RAISED WITH WHOLESOME COS.

WES PENCE, PRESIDENT OF WHOLESOME COS., DIVES INTO THE HISTORY OF HIS FAMILY'S COMPANY, WHICH STARTED BACK IN THE 1960S.

BY SAMMY BREDAR ASSOCIATE EDITOR

Wes Pence, president of Wholesome Cos., said that he was born into Wholesome Foods, as his mother and father first started the business.

Pence said his parents first sold their products at a farmers market, then transitioned to a role in distribution.

"We were actually the first company to cut chicken for Kentucky Fried Chicken," Pence said. "They used to actually cut the chicken in the stores. So we did that for a lot of years."

The family business did a lot of cutting for fast-food chicken in the 1970s and 80s, Pence said.

Pence said that in the mid-80s, he and his brother Nathan really got involved in the business, and their parents let them take the reins. Nathan and Wes have run the business ever since. He said his father died about eight years ago, but he, his mother and Nathan all meet every day to discuss the current business and operations.

In the mid-80s, Pence said that the family opened a retail store and then added country ham cooking.

"So that's something that's really grown for us, that we bring cured hams in and we debone them, skin them and cook them ... And we also sell a lot of meats and poultry," he said. The cooked country hams are currently a big-ticket product for the family business, Pence says, with products marketed under the Old Dominion brand.

Broadening its product line, Wholesome also now sells bottled water. Pence said the area they operate in has both an artesian well and quality water in general, and their business does a lot of private-label with that venture.

The Wholesome business is diverse in other ways too, Pence said.



"We have Wholesome Foods, Wholesome Transportation and Logistics, which is a fleet of trucks," he said. "We do a lot of outside hauling for people, refrigerated, and also, we do a good bit of tanker, like oils and fats."

About 15 years ago, the family business started Wholesome Energy, which Pence said has grown in the last few years. The trucking side of their business has also grown lately, but distribution has not, he says.

Because of COVID and complications for getting pork and beef, though, Pence said his business has been more involved with further beef processing. Although Wholesome does not currently have a kill floor, he said they are hoping to add one and have it up and running by the end of this year.

Pence said that finding the niche market for beef processing has been helpful for the company and sets them apart from the pack.

"I think we can really help farmers grow the products and pack it up the way they want it packed ... again, as being like a small processor with the cut sheets, we can process it any way they want to do it," Pence said. "Where typically with a huge processor, it's really hard for them to change products and change their lines. So I think that we're at a size where we can still do that."

Wholesome Foods also opened another retail outlet in a shopping center in the town of Woodstock, Va., which is a few miles north of their current location.

"We have a butcher on site and we also have a deli where we make sandwiches and things," Pence said. "And that's been a really cool thing to do because we were able to take some things from the history of our company, like old scales that my father might have used at the farmers market and some pictures from our history."

Pence said that the evolution of the company — essentially having several smaller companies under one roof — has made them stronger.

"We're kind of rebuilding the brand and changing our focus, but we're fortunate enough that we're strong as a company that we can make those investments because I see a good future in that," he said, adding that he hopes to make the local community more selfsustaining in regard to its meat products and assist farmers in building their own brands.

Pence said there is a need for more pork and beef processing capacity and plans to capitalize on that. His only concern with the planned expansion is labor but he remains optimistic for the company's expansion.

Moreover, even with labor being a challenge, Pence thanks his company's employees for all that they do and said the company's

current staff is dedicated and high-performing.

For future growth, Pence sees some potential in bringing more local beef to larger stores. He also sees some opportunity in







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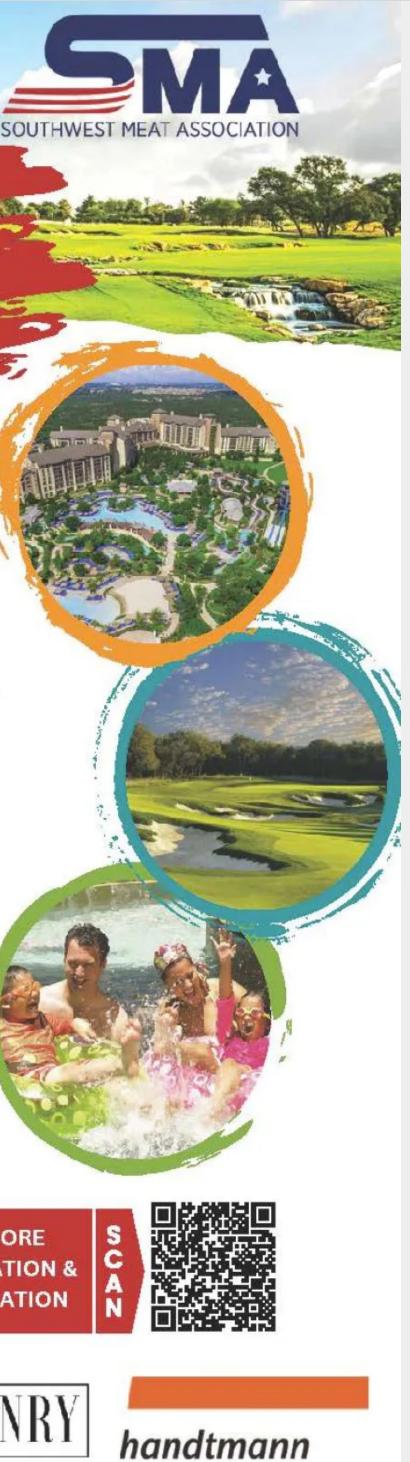
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Ideas for the future.

COMMENTARY

FIGHT FOR FOOD SAFETY



THE PROOF IS IN THE POLICY: PURCHASING RECALL INSURANCE IS ONLY HALF THE BATTLE

COSTS ASSOCIATED WITH CONDUCTING A FOOD RECALL CAN BE STAGGERING.

BY SHAWN K. STEVENS FOOD INDUSTRY COUNSEL LLC

Each year, more and more food companies discover the critical importance of having good food product recall insurance. It is a topic I write about, and speak about, often. I do so because I have seen, and continue to see, time and again, how devastating recalls can be in the absence of a good recall policy. Not just a policy, but a good policy.

As we know, the food industry is fraught with risks that can have catastrophic consequences if not managed correctly. One of the most significant risks is a food recall. While many think of recalls primarily in the context of pathogens (and many recall policies only cover this type of recall), it is important to keep in mind that recalls can occur for a variety of reasons, including foreign material contamination, mislabeling, and other issues that may pose a health risk to consumers. The costs associated with a food recall can be staggering, and will often include disposal of product, transportation, administration fees, lost sales, lost customers, reputational damage, regulatory compliance costs and potential legal claims.

Purchasing food recall insurance is a crucial step that food companies can take to mitigate this risk and protect their businesses from the devastating financial ramifications of a recall. But before purchasing the insurance, it is vitally important to know what coverage you are purchasing. Recall insurance is only as good as the policy it is written on.

Unfortunately, some insurance company offerings are so replete with exclusions and conditions that the policies are effectively worthless. Worse, it is often the case that these exclusions and conditions are deceptively placed or hidden in such a way that the average insured is unlikely to notice them (i.e., in the long list of definitions). For example, the coverage provided might state that "all Recall Costs shall be covered, up to the limit of insurance." That sounds great until you realize "Recall Costs" are defined elsewhere in the policy as "only the necessary and direct costs actually spent notifying customers about the Recall, and shall not include any product costs, disposal costs, lost profits or other costs of any kind." While such pitfalls are more prevalent than many realize, they can be avoided through care. Having an attorney review the policy is an effective way to ensure you are purchasing adequate coverage. An experienced attorney will be able to identify gaps, ambiguities and unreasonable exclusions.

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Ultimately, the insurance industry is like any other. There are good, reliable, companies selling good, reliable products. Then there are the others. A careful reading of the policy, and seeking the advice of others, will go a long way in identifying which type of policy (good or bad) you are dealing with.

Purchasing adequate recall insurance is not just a smart business decision; it is an ethical one. Purchasing recall insurance is a proactive way to protect your customers, consumers, brand, and even your employees, as the losses stemming from a recall can jeopardize the very existence of their jobs.

I cannot stress how important it is to have a good policy of recall insurance. Good recall insurance means a policy that provides broad coverage, without onerous exclusions, and with limits sufficient to cover your potential losses. Not all insurance is created equal. As such, it is important to regularly reassess and reevaluate your coverage to ensure it is adequate, and to do so before you find yourself in need of it.



COMMENTARY

AMSA

PRAIRIE VIEW A&MUNIVERSITY AIMS HIGH WITH MEAT SCIENCE CENTER



'I WANT TO PUT THIS PROGRAM ON THE MAP,' SAYS MEAT SCIENCE CENTER DIRECTOR DR. LEA ANN KINMAN.

PRAIRIE VIEW A&M UNIVERSITY

PRAIRIE VIEW, TEXAS COLLEGE OF AGRICULTURE & HUMAN SCIENCES DEAN GERARD D'SOUZA, PH.D.

Prairie View A&M University, located 45 miles northwest of Houston in Prairie View, Texas, has a brand-new Meat Science Center to continue the vision of the late Lindsey Weatherspoon, renowned College of Agriculture and Human Sciences professor who expanded meat science studies at PVAMU in the 1960's.

"I want to put this program on the map" said Dr. Lea Ann Kinman, Ph.D., inaugural director of the PVAMU MSC. Kinman arrived at PVAMU in spring 2022 with clear objectives and goals to increase exposure of the new facility and bring more students into the lab to explore and pursue careers in meat science.

Founded in 1876, PVAMU is an 1890 land grant institution that has a triple-mission of research, teaching and extension to serve communities within Texas. The MSC is an 8,220-square-foot building on the 778-acre Gov. Bill and Vara Daniel Farm and Ranch. The facility includes a dry lab, multiple freezers and coolers, classroom space, and rooms for harvesting, processing and packaging.



Construction was funded by the U.S. Department of Agriculture and the National Institute of Food and Agriculture, with both organizations having long-standing relationships with PVAMU.

"This facility will greatly benefit students," said Dr. Gerard D'Souza, CAHS dean and director of Land Grant Programs. "It will enhance their skill set through experiential learning. Those learning objectives include food handling and processing, adding value to meat products, and working alongside faculty mentors to create exciting new project innovations. It will make them more marketable and ultimately, more productive people."

The MSC continues the land grant mission of research, teaching and extension, and provides exposure and opportunities to both internal and external stakeholders.

"My vision is to make Prairie View more visible to the greater community and the new MSC will help with that," Kinman said. "I have created an immersive, hands-on environment to introduce students to meat science, and expose them to the various careers within the meat and poultry industry."

Each semester in ANSC 3352 Meat Science, students will learn muscle physiology, carcass fabrication, ingredient functionality and processed meat product formulations, all while creating a transferable skill set. This experiential learning environment will provide the students with technical skills and help them understand the connection between course content and practical application, better preparing them to enter the workforce.

At PVAMU, the MSC Research Technician II has a long history of working with the university. Before working at the new facility, James Smith worked on the Gov. Bill and Vara Daniel Farm and Ranch that is home to the MSC and an expansive goat breeding facility.

"I am excited to have James on board, as he brings a wealth of experience with goats, a primary area of research for CAHS," Kinman said.



Speaking of goats, PVAMU is also home to the International Goat Research Center that aims to advance the science of dairy and meat goat production and use this information to improve the livelihoods of the people in Texas, the Gulf Coast region and developing countries abroad. Current collaborative research between the MSC and IGRC includes evaluating carcass characteristics and meat quality for the Sustainable Goat Production Practices Project for Texas and the Gulf Coast.

"Texas is a top producer of meat and dairy goats so having a world-renowned research center to partner with is an honor," Kinman said.

With a focus on the extension aspect of the land grant institution mission, Kinman recognizes the value in establishing partnerships that will strengthen economic development in rural communities throughout the state of Texas and beyond.

Having student workers in the Meat Science Center reinforces Kinman's passion of providing experiential learning to students to ensure they are industry ready. Joshua Evans, an agriculture major with a focus in pre-veterinary medicine, loves

the new meat science center and has direct access to great mentors.

"Since starting at the meat science center here at PVAMU, I have had many great experiences. I really enjoy working with Dr. Kinman and James and I love how hands-on the job is and how everyone here is willing to teach and learn from one another," Evans said.

In addition to student workers, we currently have a Texas Department of Laborapproved apprenticeship in butchery through the PVAMU Rural Workforce Academy. Through the PVAMU Cooperative Extension Program, the TRWA provides a variety of skilled trades training, certification, and job placement to rural counties impacted by disasters. This partnership extends Kinman's goal of increasing exposure and creates a talent pipeline for the meat science industry.

The future of the facility includes creating a student-led storefront, PV Meats, that will offer a variety of products available for purchase by faculty, students and the community. As a method of generating student scholarships, the MSC staff and students partner with the Texas Steak Cookoff in Hico, lending their skills to cut 3,000 ribeye steaks every year for the event. We are constantly looking for ways to partner with other organizations and continue the work of keeping the meat science industry at the forefront of agriculture education.

SUPPLIER'S PERSPECTIVE

ELANCO



EFFECTIVE INTEGRATED PEST MANAGEMENT PROGRAMS CAN LOWER THE POTENTIAL SPREAD OF FOODBORNE PATHOGENS IN POULTRY PRODUCTION.

Most people can quickly spot the signs of a pest infestation in a poultry house: beetles crawling up the exterior walls, swarms of flies near piles of organic debris or chewed-up litter by feed pans. However, not everyone associates these signs with what they can bring into an operation: the beginning of a potential foodborne disease transmission.

Insect pests are not just a nuisance to animals and producers. They are also an often-overlooked factor in the food safety process. Controlling insects through an Integrated Pest Management (IPM) program can lower the potential spread of pathogens and diseases in poultry production.

Learn the steps producers can take to mitigate pests and how to effectively treat infestations while also helping to prevent chemical resistance issues and improve food safety efforts.

UNDERSTANDING FOODBORNE PATHOGENS

Historically, plant facilities were solely responsible for protecting the food supply from foodborne pathogens. But now that

responsibility has moved further upstream to include the farms where birds are raised, according to the USDA's framework to reduce Salmonella illnesses. Knowing how insects spread pathogens is one of the first steps towards solving the problem.

"Take a fly, for example," said Alissa Welsher, Ph.D., Elanco food safety technical consultant. "It's covered in sensory hairs. When a fly lands on fecal matter containing *Salmonella* or *E. coli*, the sensory hairs pick up and hold that pathogen and transfer it to wherever it lands next. This action is similar to how a bee can land on a flower and pick up pollen on its legs."

An IPM program, as part of an overall food safety program, can control a poultry flock's well-being and performance potential and reduce zoonotic pathogen loads, such as *Salmonella*, *E. coli* and *Campylobacter*. Understanding the connection between flock health, pest management and foodborne pathogens is critical to ensure a poultry supply is properly protected.

UNDERSTANDING THE CONNECTION BETWEEN FLOCK HEALTH, PEST MANAGEMENT AND FOODBORNE PATHOGENS IS CRITICAL TO ENSURE A POULTRY SUPPLY IS PROPERLY PROTECTED.

STRATEGIES TO MINIMIZE PEST ISSUES

Creating an effective IPM program has many benefits to a producer, including tackling costly and annoying infestations, creating an environment that supports flock health and reducing the potential for foodborne pathogens.

Producers can minimize the spread of pathogens by making facility health a priority. Here are some best practices:

- Keep grassy areas near production buildings mowed to discourage pests from creating a habitat there.
- Regularly clean out litter and ensure that it is not too deep on the floor. Practice cake-outs and windrowing. When rotating out litter, don't pile it up outside in deep piles. Pests thrive and breed in dark, damp environments.
- Keep buildings dry, including outside areas that may become muddy. Flies lay eggs in wet environments.
- Make sure that ventilation fans are working to keep facilities dry. Clean up dust, feathers and other debris that may get sucked into the fans. (The same goes for any organic waste that accumulates inside facilities.) Debris piles attract insects that like to feed on and breed in organic material.
- Walk buildings often, looking for signs of pest damage so you can treat those areas quickly. Damage to insulation is a key indicator of a beetle infestation. It also makes the facility less energy-efficient. Another potential sign is damage to the sealer, footers and bottom plates beetles in the larval stage can chew through and destroy these areas very quickly, leaving a gap around the perimeter of the building. This gap will then attract more pests into the building.
- Apply insecticides and/or rodenticides properly in the right amounts, in the proper places and at the correct times to help directly control pest populations.

MONITOR CHEMICAL USE CAREFULLY

Many pests breed outside the facility and then move into the building in search of a food source. Therefore, treating both the interior and exterior of a house is recommended for increased control. With four commonly used chemical classes, proper rotation is vital to prevent resistance issues from occurring.

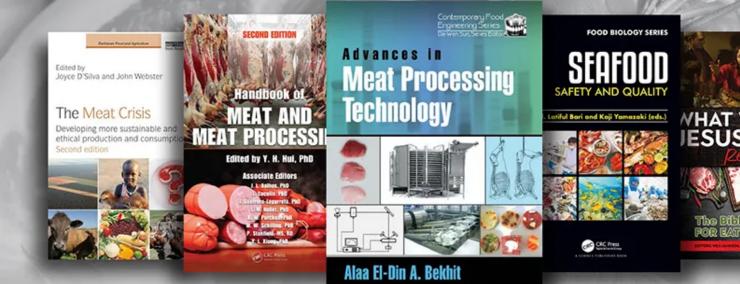
"I always tell people to read the label and look for the chemical class, not the active ingredient," Welsher said. "Our best defense against developing resistance to these chemicals is ensuring we properly rotate the chemical classes. Apply stronger chemical classes during the times of year you know there's a higher population of flies or beetles, and then follow with a weaker chemical class to maintain that pest."

Proactively check labels for correct dosages, chemical classes and active ingredients and work with a trained chemical applicator to ensure that best practices are followed.



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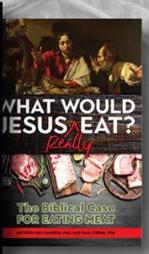
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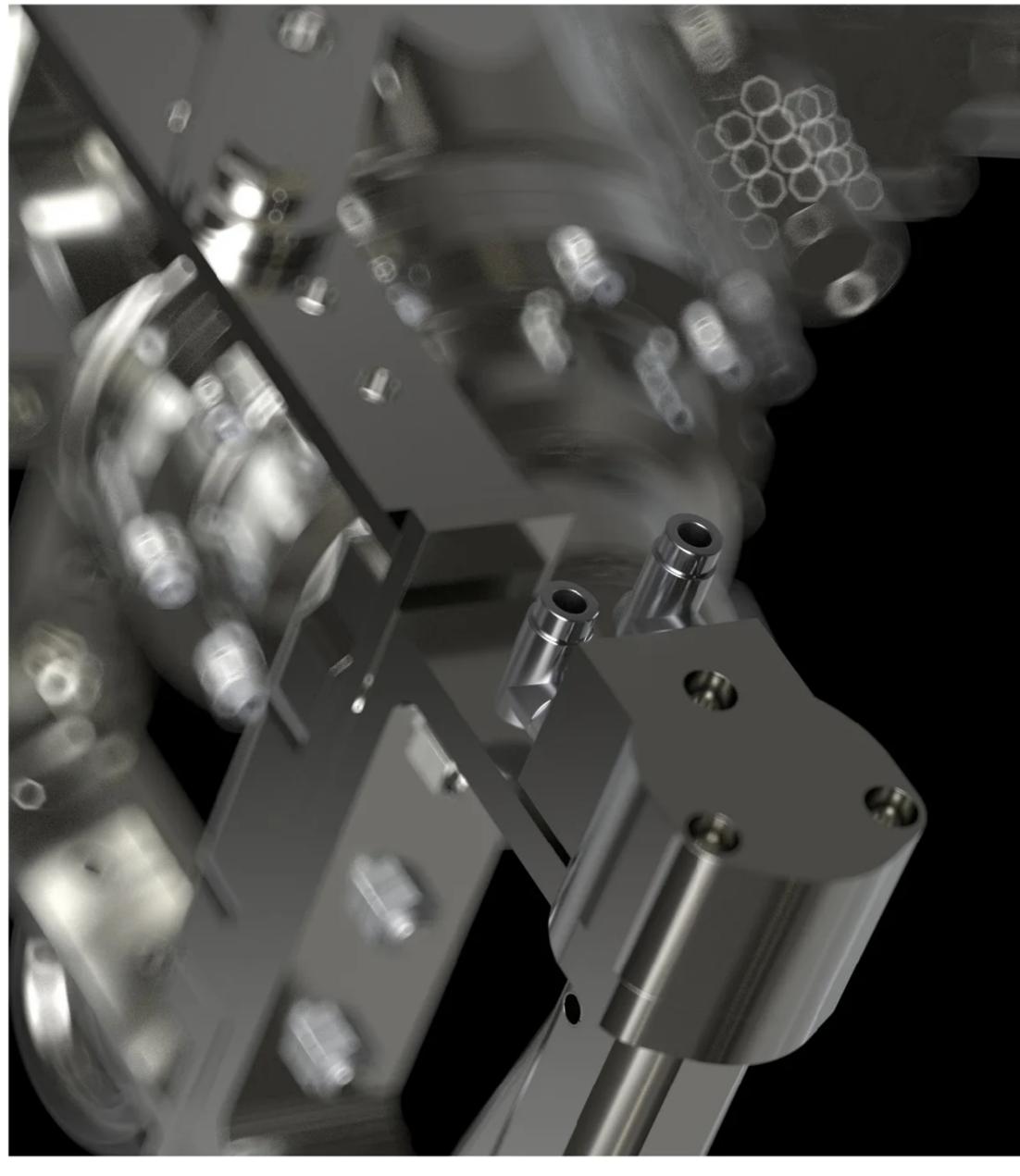


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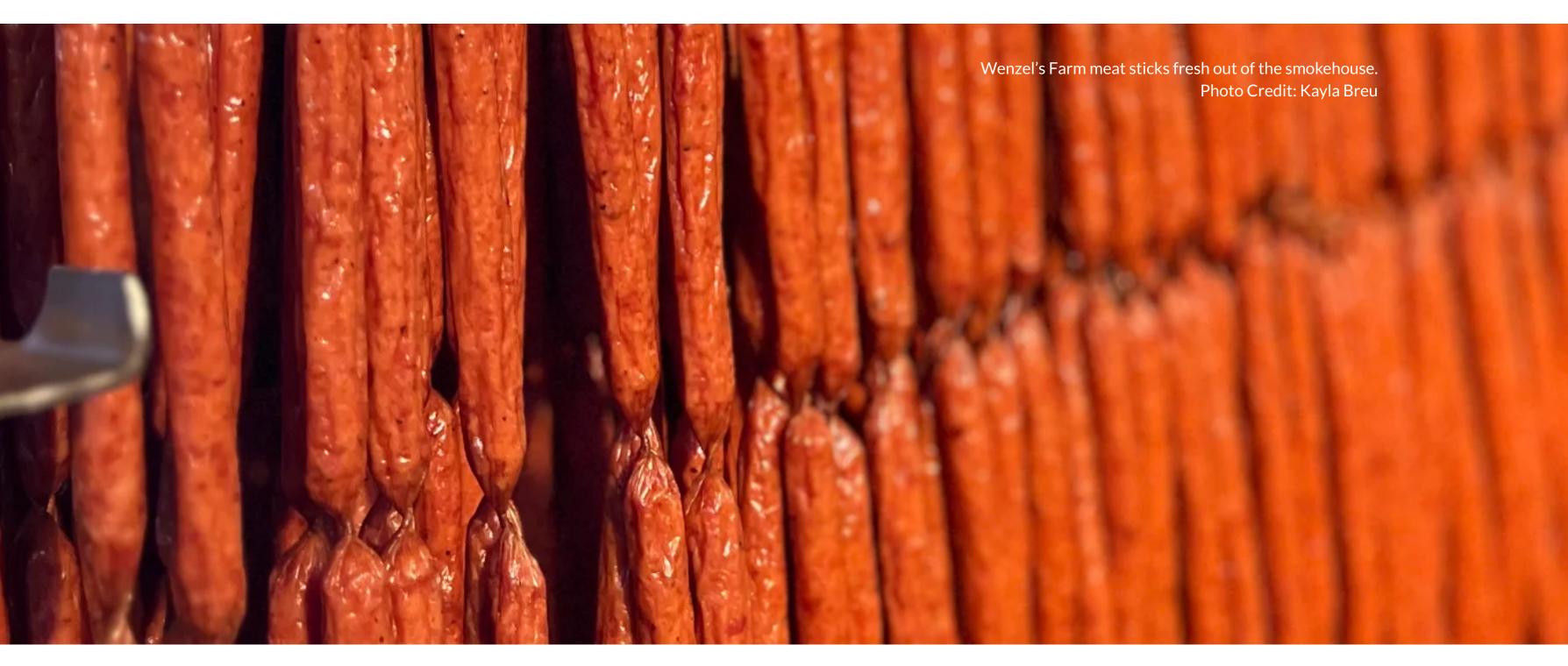
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PROCESSOR PROFILE
WENZEL'S FARM



OLD METHODS CREATE NEW OPPORTUNITIES

WENZEL'S FARM OPERATES OUT OF THE BARN WHERE THE BRAND ORIGINATED IN 1949. B^{A}

BY SAMMY BREDAR ASSOCIATE EDITOR

Mark Vieth, president of Wenzel's Farm, has been with the company for nearly two decades. Vieth said that 19 years ago, he applied to an ad in the paper and began working as an accountant for Russ Wenzel. Vieth said he now serves as president for Wenzel's Farm and has done so since 2010, following the passing of Russ Wenzel.

Marshfield, Wisc.-based Wenzel's Farm still operates out of the original barn in which the brand originated since the company's founding in 1949. Wenzel's Farm aims to carry on the craft of sausage-making brought from Germany to Wisconsin more than 100 years ago, with the company positioning itself as a premium provider of handcrafted, small-batch meat snacks and products such as sausages, jerky bratwurst and hot dogs.

Industry complications over the past few years have affected many individuals and companies, and though Wenzel's Farm is no exception to that experience, the company did see a bit of a silver lining. Vieth said that because larger companies were also impacted by supply chain issues, that disruption combined with continued consumer demand gave Wenzel's Farm an opportunity to reach a different area of consumers.

Vieth said that since the company was bought by an investment group in 2014, customers now get the best of both worlds.

"We've been able to compete ... by delivering excellent service that a smaller company can deliver, but also have the financial backing to be able to support our retailers' programs. And that makes us unique. But quality's still No. 1," he said.

Wenzel's Farm does not use fillers or binders. Vieth said that Wenzel's Farm is known for its quality, and that has been the case since the company was created in 1949, as the Wenzel's family philosophy is to use quality products.

The company also only uses clear casings, rather than colored casings, on snack sticks. Vieth said the company's use of clear casings started back in 2017 due to consumer trends leaning more toward natural products. Though Vieth said it was considered a risky

Juide

Looking ahead, Vieth said the company plans to increase efforts in marketing while maintaining its established retail partnerships.



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SPECIAL REPORT

SUMMER GRILLING REPORT

WHAT'S HOT FOR GRILLING IN THE SUMMER OF '23

Photo courtesy Tyson Foods

CIRCANA, 210 ANALYTICS, BUBBA BURGER, VERDE FARMS, HICKORY NUT GAP AND TYSON FRESH MEATS ALL SHARE THEIR TAKES ON 2023 SUMMER GRILLING TRENDS AND INNOVATIONS.

BY SAMMY BREDAR ASSOCIATE EDITOR

As the summer months are fast-approaching, consumers, retailers and foodservice operators alike need to know what to expect for this year's summer grilling trends. Circana, 210 Analytics, BUBBA burger, Verde Farms, Hickory Nut Gap and Tyson Fresh Meats all share their takes on 2023 summer grilling trends and innovations.

Anne-Marie Roerink, principal at 210 Analytics, said that those in the meat industry have seen consumers invest in grilling — the meat industry is capitalizing on that investment.





As consumers realize the benefits of at-home cooking, Roerink said that "the evolution of premium burgers continues in a variety of ways, including added ingredients, such as vegetables, mushrooms, cheese, bacon, etc. It also includes making burgers from different cuts, such as ribeye or brisket. These are often sold in two's or four's and are ideally positioned to be the 'pub food' restaurant replacement."

Hickory Nut Gap is participating in this evolution with its new Vital Blend.

"That's mostly a ground beef product, but it's got some heart and liver blended into it," said Jamie Ager, founder, farmer and CEO at Hickory Nut Gap. "It's appealing to the customer out there who really wants to be more health-focused around micronutrients and all the benefits that organ meats provide from a health standpoint but making them more approachable."



Photos courtesy BUBBA Burger

Roerink said packaging innovations for sausages and brats include ovenready sausages, as well as sausages that are individually wrapped. Roerink said that seafood is also getting popular in summer grilling, as grilling is extending beyond just the meat department and becoming more of a full-store occasion.



For whole-muscle meats, Roerink said consumers are understanding the value of at-home meals.

"Here we see the popularity of kebabs, value-added/pre-marinated meats, as well as the continued popularity of ribs, brisket, etc.," Roerink said.

BUBBA burger is catering to this consumer appreciation, as Elizabeth Rice, brand manager for BUBBA burger, said they are launching the Angus Swiss BUBBA burger this spring.

Tyson Fresh Meats is also getting in on summer grilling innovation with the launch of its Chairman's Reserve Prime Pork Tomahawk Chop, said Brittany Banuelos, senior brand manager at Tyson.

"It has the rib meat on there as well as that pork chop," she said. "You'll see influencers really popping up and showing pork tomahawk chops, and then some restaurants are featuring it on their menus. We're launching it in the case-ready format at Albertsons, Portland." She said the product is scheduled to launch in April.



Photo courtesy Tyson Foods

PROMOTIONS

Given the expansion of grilling beyond the meat department, Roerink said retailers are capitalizing on that by increasing marketing.

"Understand the occasion and you can drive a much bigger ring," she said.

"For instance, Meijer had a promotion offering dollars of meat when purchasing beer," Roerink said. Roerink also says that she has seen educational signs in the meat department that offer seafood grilling tips.

Tyson Fresh Meats has pitmasters and influencer partners to promote grilling, Banuelos said. She said that for Chairman's Reserve, Tyson has primarily focused on Instagram.

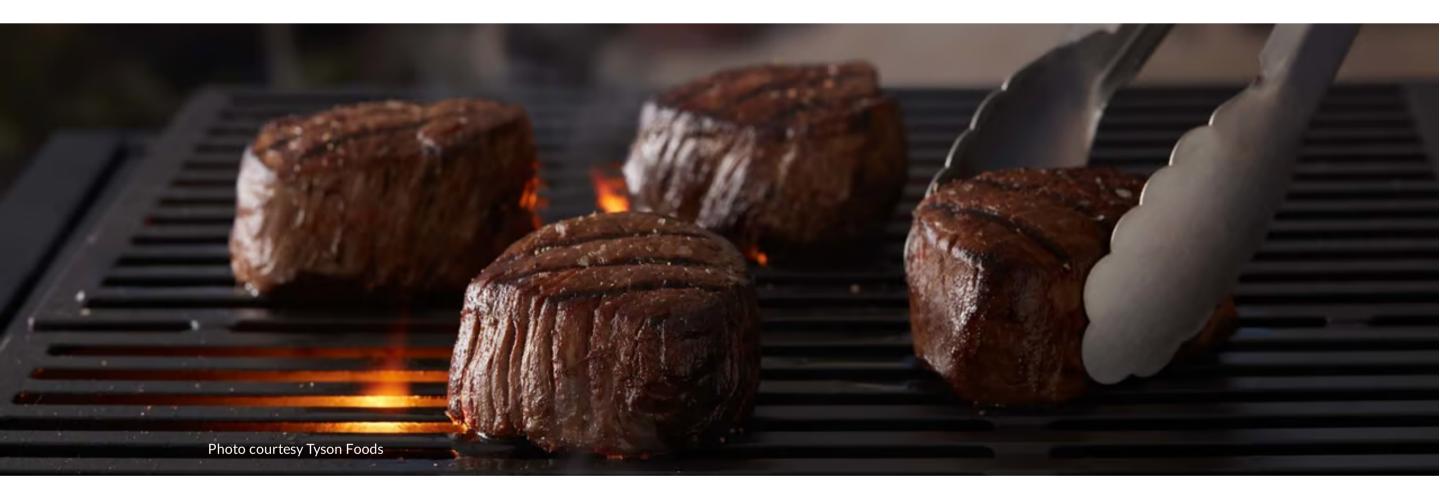
"But we are also on Facebook and then dabbling a little bit in [TikTok]. That is something that we are looking to incorporate more into the future," she said.

Amanda Evans, consultant, Client Insights at Circana, said that the effectiveness of promotions can depend on the age of the consumer.

"When retailers and manufacturers are looking at prioritizing promotions during the summer it will be very important to select the promotion based on their desired consumer target," Evans said.

BUBBA burger is launching a digital media campaign to promote its summer grilling products, Rice said.

"We also work closely with influencers and lead a brand ambassadors program to showcase BUBBA burger grilling tips and recipes," she said, adding that that research suggests consumers look to social media platforms for their cooking inspirations.



INFLATIONARY PRESSURES

Inflation is hitting heavy with consumers, and Roerink said there is growing demand for smaller and larger packages.

"The increased demand for value or family packs is supported by higher income consumers who have the means to invest in price for savings over time," she says.

Roerink cites research for AFFI, which found that consumers have been growing their freezer storage since the pandemic began.

"That means consumers have an opportunity to take advantage of the BOGOs and value packs," she said. "But this comes with an opportunity to better serve consumers as well through freezer-ready packaging, selling pre-proportioned items within a larger value pack or mix and match discounts."

Roerink said consumers are also trying to find the best value in their meat products.

Banuelos says Tyson Fresh Meats is aiming to cater to this consumer need for value. "Chairman's Reserve is well-positioned to provide that restaurant eating experience, but it's more economical because consumers can cook it at home," she said.

Circana's Amanda Evans says that consumers purchased slightly bigger sizes of fresh meat, except for fresh beef, to combat inflationary pressures.

"Households also use these tactics to fight inflation: shopping value channels, trading down essentials, purchasing more private label, and reducing leftover waste," Evans said.

Verde Farms CEO Dana Ehrlich provides a different angle for consumers to save money.

"As inflation raises the cost of the family meal, a great way to save money is converting a tough, inexpensive piece of beef like a chuck roast into a delicious, tender, and juicy meal that adults and kids alike will love," Ehrlich said.

VALUE-ADDED TRENDS

Roerink said flavor innovation in the store is coming in limited-time-offers, appealing to the popularity of new flavors.

"For years, my research has found that the segment of the population with a high interest in value-added ... is also a segment with above-average interest for production attributes, such as organic and grass fed," Roerink said. "The innovation in value-added, organic chicken, for instance, has driven above average growth for the segment."

Roerink said consumer purchasing of value-added meats demonstrates the strength of value-added and is likely an indicator of a continued path of growth.

Evans said consumers want easy meals during the summer months and that the top summer grower for protein value-added products is pork.

"Other areas with volume growth are turkey wings, beef (round, flank, ribeye), and chicken (thighs, legs, wings)," Evans said. "Top growth from value-added segments for the summer of '23 will ... be the segments that simplify the grilling or smoking to offer consumers a delicious ready to go meal."

BUBBA burger is appealing to this consumer demand for convenience.

"Value added meat offers premium quality but also convenience, which is where BUBBA burger fits right in," Rice said. "Each BUBBA burger can be prepared from box to bun in less than 15 minutes, and busy families can keep them in their freezers to always have on hand."

FLAVORS AND FORMULATIONS

For flavor trends, Roerink said more variety is entering the store, including more regional and international flavors. This is due to younger consumers' preferences.

"Across categories ... Millennials are more adventurous and they see value-added meat as a way to skip a few steps, try something new and not having to buy a wide variety of spices but buying the solution all in one swoop," Roerink said.

Roerink also sees a demand for blends that create different flavors.

Circana says that growth for summertime flavors vary by protein.

"Top growing flavors in beef are citrus, herb, garlic, bourbon, and teriyaki, whereas in pork ... applewood, honey, hot, fruit, chipotle, cheese, garlic, and bacon," Evans said. "In poultry there are less flavors growing, chicken growing flavors are applewood, [Cajun] and fruit."

"In summer top over indexing segments are frankfurters, pork ribs, pork dinner sausage, and beef loin," Evans said.

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WASHINGTON STATE REINVIGORATES ITS MEAT SCIENCE PROGRAMS

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PULLMAN, WA DEPARTMENT OF ANIMAL SCIENCES DR. GORDON MURDOCH, DEPARTMENT CHAIRMAN

The Department of Animal Sciences at Washington State University (WSU) with approximately 550 undergraduate students has recently reinvigorated its offering of meat science focused classes, extension programs, and student opportunities.

The program has strong historic roots in the discipline with ties to wellrecognized meat scientists, including Drs. Gary Smith, Everett Martin, Gordon Davis, Jan Busboom, Matt Doumit, and Carol Lorenzen, among many others.

In summer 2022, the department hired Dr. Blake Foraker to lead the reinvigoration efforts of the meat science program. In addition, WSU alumnus and longtime meat scientist at Kansas State University, Dr. John Unruh returned to Pullman as a full-time resident and joined the department to serve in a lecturer position.



Built in the early 1970's, the 16,000-square-foot WSU meat laboratory



primarily serves the needs of local customers through its offering of custom slaughter and fabrication services. The facility also produces Angus and Wagyu beef, which is marketed as WSU Premium Beef and WSU Premium Wagyu, respectively, from cattle raised at the WSU Beef Center just 7 miles from campus. Recent modifications to the facility include a research/teaching kitchen, fully equipped teaching classroom, modernized animal handling and receiving, and a public-facing retail storefront. The meat laboratory manager, Dan Snyder, provides a wealth of experience to customers and students, having worked at the facility for 37 years. The facility employs five undergraduate students and one undergraduate student intern. A smoked beef and pork sausage, coined the Cougar Smokie, has been a time-tested feature of the facility. Plans are underway to expand the facility's offering of products to an array of beef, pork and lamb retail cuts to be marketed under the label Cougar Quality Meats.

For the first time in many years, students are enrolled in the Meat Science and the Livestock and Carcass Evaluation courses at WSU. Previously, students at WSU interested in such courses were required to enroll in the cross-listed version of these courses at the University of Idaho, just a 10-minute drive from Pullman. These new course offerings at WSU expose students to hands-on learning opportunities at the meat laboratory each week. Some of these tangible learning opportunities include the evaluation of livestock on the hoof and on the rail, evaluation of sensory properties of meat, and fabrication of carcasses into retail cuts. It is expected that these newly provided learning opportunities will position WSU as a leading source of well-trained students for the meat industry in the Pacific Northwest and beyond.

The program also features a meat judging team and a meat animal evaluation team for students to gain additional training in the discipline outside of the classroom and in a competitive atmosphere. The newly formed WSU meat judging team recently claimed back-to-back championship honors in the A-division intercollegiate meat judging contests at the National Western Stock Show and the Fort Worth Stock Show and Rodeo, the first wins for the program in more than 50 years. The current meat judging and meat animal evaluation team is comprised of 11 Junior and Senior level students. The team offers a barbecue catering service as a fundraiser to support team travel to national contests.

The program also hosts learning opportunities for youth interested in meat and livestock production. The inaugural Cougar Invitational youth meat judging clinic and contest is planned for mid-March 2023. Additionally, the meat laboratory regularly opens its door for 4-H and FFA teams to prepare for upcoming contests. The program offers services for livestock judging and carcass shows at local and regional youth livestock shows and fairs.

For more information about WSU Animal Science, visit ansci.wsu.edu. Specific questions about WSU meat science can be directed to Dr. Blake Foraker, blake.foraker@wsu.edu, 509-335-4112.

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FIVE GENERATIONS OF LEADERSHIP AT COLUMBIA PACKING

COMPANY PRESIDENT AMBER ONDRUSEK CARRIES ON THE TRADITION BY LACY BATES THAT BEGAN UNDER HER GREAT-GRANDFATHER, JOSEF ONDRUSEK.

In the February issue of Independent Processor, I gave a brief background about a long-standing Southwest Meat Association's (SMA) member of 50-plus years, Columbia Packing Co. Columbia Packing is an independent family-owned business, located in Ennis, Texas, approximately 40 miles south of Dallas along Interstate 45. Follow along to a quick Q&A interview Amber Ondrusek, the first woman president of Columbia Packing Co.

SMA: How long has Columbia Packing Company been in business?

Amber: Columbia Packing has been operating for 110 years, since 1913. I am the fourth generation to lead the company.

SMA: How long have you been president of the company?

Amber: I have been president of the company for five years. I am honored to lead the company my great-grandfather, Josef Ondrusek, started near downtown Dallas.

SMA: What products are produced at Columbia Packing Co.?

Amber: At Columbia Packing, we are a federally inspected further processing facility. Our main products include smoked ham, smoked bacon, smoked hocks and smoked neckbones.

SMA: What advice would you give to women pursuing a career in the meat industry?

Amber: Find your squad. Find your advisers, your trusted confidants, and lean in. Consult with people inside and outside of the industry. Remember that everyone has a different viewpoint. Keep in mind there will be conflict, so don't take it personally. It rarely is about you and more about the situation or other person.



SMA: How has SMA helped you as a woman in the industry?

Amber: Education is a game changer. SMA has various resources for women in the industry including educational sessions, hosting seminars, and peer networking. In this industry, regulatory rules and regulations are constantly changing. It is important to stay updated on all things that could affect your operations. Having a team like SMA to lean on has helped our company stay in business for over 100 years and has assisted me as the first woman president of the company.

SMA: Columbia Packing recently opened a further processing facility in Ennis, Texas, a few years ago. What is your favorite feature of the new establishment?

Amber: If I had to pick just one, it would be layout. Coming from a location that the previous three generations of Ondruseks added on to over time, it is game changing to have the flow of products and storage.



Willie Ondrusek hard at work (second generation).

Joe Ondrusek, third-generation president, in the driver's seat of Columbia's 1913 Ford pickup in front of the original establishment's loading dock.

Columbia Packing Co. is deeply rooted in the meat business -- from the first generation in 1913 to today. Without a doubt, the fifth generation of Ondruseks will soon leave their footprint in the family business.

In my next few articles in Independent Processor, I hope to shed more light on the women in the industry from business owners to food safety and academia. Each year there is an increasing number of women entering the meat industry and taking on leadership roles. SMA's scholarship program has even shown an influence on females pursuing a degree and career in the industry. From 2020-22, the SMA Scholarship Foundation awarded scholarships to 68%, 78% and 60% women, respectfully. This is an exciting time for our industry.



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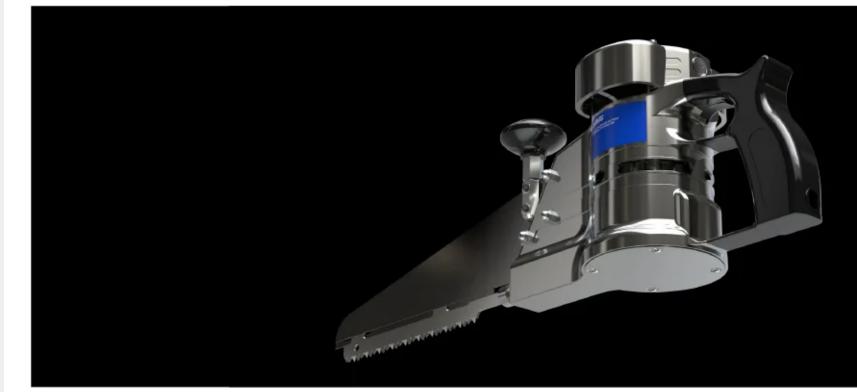
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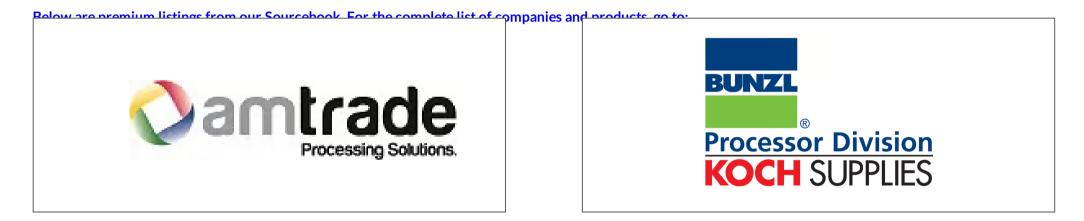
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