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2024 ECONOMIC OUTLOOK REPORT

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COMMENTARY: AMSA

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David W. Solana
President & CEO, Roger Wood Foods

SIGNATURE SAUSAGE SUPPORTS SALES

Roger Wood Foods' Lumber Jack smoked sausage and its eye-catching retail cartons fuel northward expansion for the Savannah, Ga.-based processor. "The consumer — is our boss, and that's who we want to serve," says David Solana, president, CEO and owner of Roger Wood Foods.

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ECONOMY UNDERGOING CHANGE

The demise of dining-in that began during the pandemic shows continuing signs of being a lasting change to mealtime in America.

Drive-through restaurant traffic increased 30% from 2019-22, according to a report from foodservice market research firm Technomic. The number of people opting to eat on site at fast-food restaurants in the first half of 2023 declined by nearly half (47%) since 2019, with drive-through patrons now claiming two-thirds of all fast-food purchases. Chick-fil-A plans to open a two-story, four-lane drive-through in Atlanta.

Check out The National Provisioner's 2024 Economic Outlook Report for some insights on what market developments await in the coming year.



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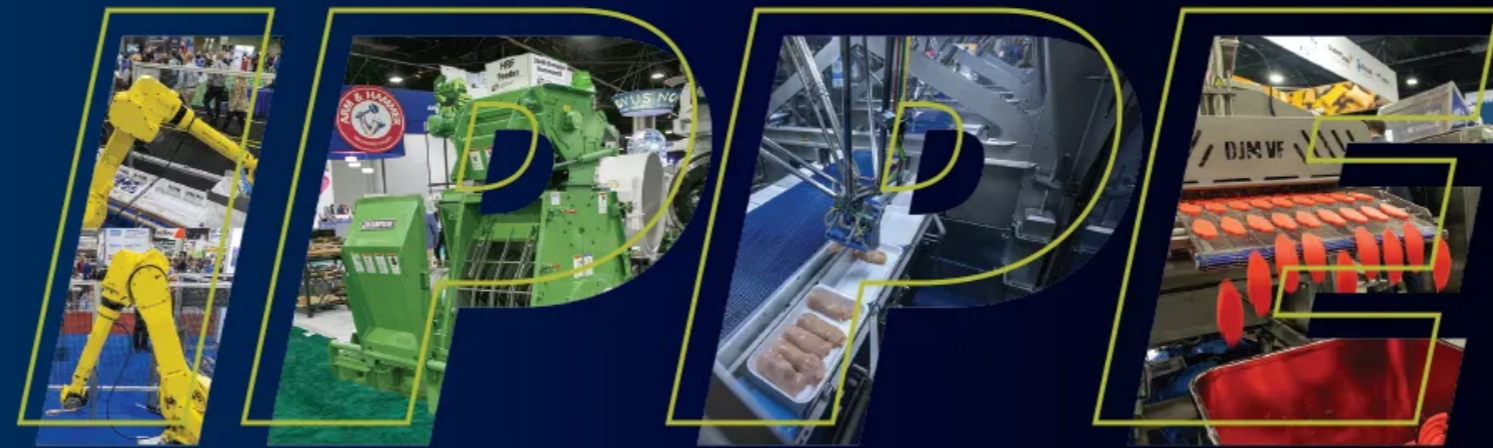
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LABOR AND FUNDING ACCESS REMAIN LOW FOR PROCESSORS

AS 2023 COMES TO A CLOSE, PROCESSORS CONTINUE TO STRUGGLE WITH LABOR AVAILABILITY AND FUNDING ACCESS.

BY SAMMY BREDAR
ASSOCIATE EDITOR

While we've heard that inflation is cooling, inflationary impact is still very real for consumers and processors alike.

AAMP Executive Director Chris Young noted that while many people have varying definitions of what constitutes a recession, the impact is unanimous.

"In general, it's just costing a lot more to live month-to-month than, say, two years ago ... I think most Americans are feeling it already, whether we get to a full recession or not," Young said.

While Young said he did not think the economy is impacting labor very much, he did expect workers to either be more eager to get back into the workforce, or seeking part-time work, but that hasn't happened yet.

"I'm not sure whether the economy has really got to the point yet where it has spurred people to get back into the labor market or to take on part-time jobs or more hours," Young said.

Michael Farrand, global head of food and ag for DecisionNext, is seeing some improvement in labor availability, but is unsure of that growth trajectory, since the industry is only just recovering from the intense labor hit during the pandemic.

Young said that due to interest in farm-to-table products, the meat industry has been growing for the last 10 years or so. He noted that smaller processors are still struggling to find appropriate funding for their operations, despite state and federal government efforts to increase access to expansions.

"I think there's still a bit of frustration there in finding the right funding to be able to expand your business or to try and purchase the equipment or do what you need to keep up with the demand that is there," Young said, adding that a lack of funding and labor is hindering industry potential.

"I think right now the untapped part is we don't really know just how much business they could really do because we don't have the labor to do it," he said.

Young said that having funds for automation and new equipment could help processors reach their full potential, but processors are having difficulty getting access to that kind of funding.



As automation becomes more commonplace in the industry, Young said that automation is not replacing workers but filling a need in the market for more workers.

"It's automation to replace employees they can't hire, so that they can continue to expand their business and meet the demand," he said.

PMMI's vice president, market development, Jorge Izquierdo said that, in this inflationary environment, smaller processors are struggling to gain access to funding for packaging materials and equipment due to higher borrowing costs (State of the Industry 2023, Page 12).

"Amongst high inflation, the Federal Reserve has moved the federal funds rate to its highest point in two decades ... This higher cost of borrowing, however, has not impacted large, cash-heavy end-users to the same degree," Izquierdo said.

For those smaller processors, he recommends focusing on productivity and looking at a total cost of ownership.

"While a full exercise in calculating the total cost of ownership of equipment could be daunting, at minimum a good idea on the principle and all the considerations that need to be taken into account is key to avoid surprises that could impact a successful implementation," Izquierdo said.

PRESSURING PROCESSORS

Financial strain is impacting not only consumers, but processors as well. Regulatory pressures can put increased financial strain on processors. For the coming year, AAMP is most tuned into the EPA final ruling on wastewater from meat plants, releasing in December 2023. Young said that AAMP is concerned EPA has not done enough research to be issuing a proposed ruling. If EPA issues the ruling based on too little data, they would be imposing unnecessary, potentially devastating financial pressures on processors.

PMMI is concerned with extended producer responsibility for packaging laws for 2024, which places end-of-life environmental responsibility for products on the producer.

U.S. states, Canadian provinces and Europe are passing varying EPR legislation, which can lead to unintended consequences, Izquierdo said. While developing EPR policy, Izquierdo recommends planning for future change (2023 Packaging Compass, Page 19).

"Early in the development of an EPR program, dialogue with the packaging value chain to understand design trends and potential restrictions or trade-offs on changing packaging design may help ensure that investments made into packaging recovery reflect what the future of packaging will be," he said. "By advancing a dialogue on the future of packaging and engaging stakeholders across the packaging value chain, EPR proponents can help ensure these systems are proactive and set up to influence the design and match the needs of both packaging designers and recyclers."

As California's Proposition 12 goes into effect Jan. 1, 2024, DecisionNext is keeping an eye on other states that may follow suit.

"While the industry moves to stay ahead of demand for qualifying pork, the fact remains that the pace of demand will continue to stress the industry's ability to keep up," Farrand said. "Our customers have been running different scenario levels of pork availability in our software that highlight the potential impacts in 2024."

"Of course, beef import and export levels are also variables our customers game-play in our software regularly, and in the era of tight beef supplies that will be very important to fully understand," Farrand said. "For example, the recent Paraguay import authorization isn't expected to increase total U.S. import levels and doesn't move the needle in forecasted beef pricing."

Beef supplies are forecast to be trending downward for a while, and Farrand noted that it will take the industry a while to recover from drought.

"These cow lean inputs are core to producing ground beef, impacting retail and foodservice hamburger sales," Farrand said. "Ground pork could play a role in supplementing that particular need, along with ground chicken turkey."

For 2024, the beef industry is in murky waters. Farrand recommends having various cut to cattle price ratio forecast models to account for shifting conditions in the cattle market. For DecisionNext, they are forecasting based on graded cutout due to very high cattle price levels.

"This approach increases forecast accuracy significantly in these cattle market conditions," Farrand said. "With grade shifting among consumers becoming more prevalent, we recommend this approach going forward."

Young noted that, though the economy has taken a hit, the demand for meat products is still present.

Consumers are changing their spending habits to account for less spending power, veering away from high-ticket items. Young also noted that buying in bulk is another way consumers are adjusting to tighter budgets.

Farrand said that, although consumers can "buy down," the inflationary impact is still very real.

"With cattle trading at 10-year highs, and chicken at 15-year highs, the consumer is generally struggling to find the values among their options," he said. "Switching down in beef cut grade or type, or replacing some beef purchases with pork or chicken, still puts the consumer in relatively high price territory today."

Farrand said that, although prices have decreased from historical highs, the economic forecast for 2024 shows a "new normal" of high material costs.

Although clean-label, natural and organic products are trending in the industry, those products typically come with a higher price tag.

Young said that reasons for purchasing these "better-for-you" products like grass-fed or natural beef will lead consumers to either switch to a lower-priced option, or stay in that category.

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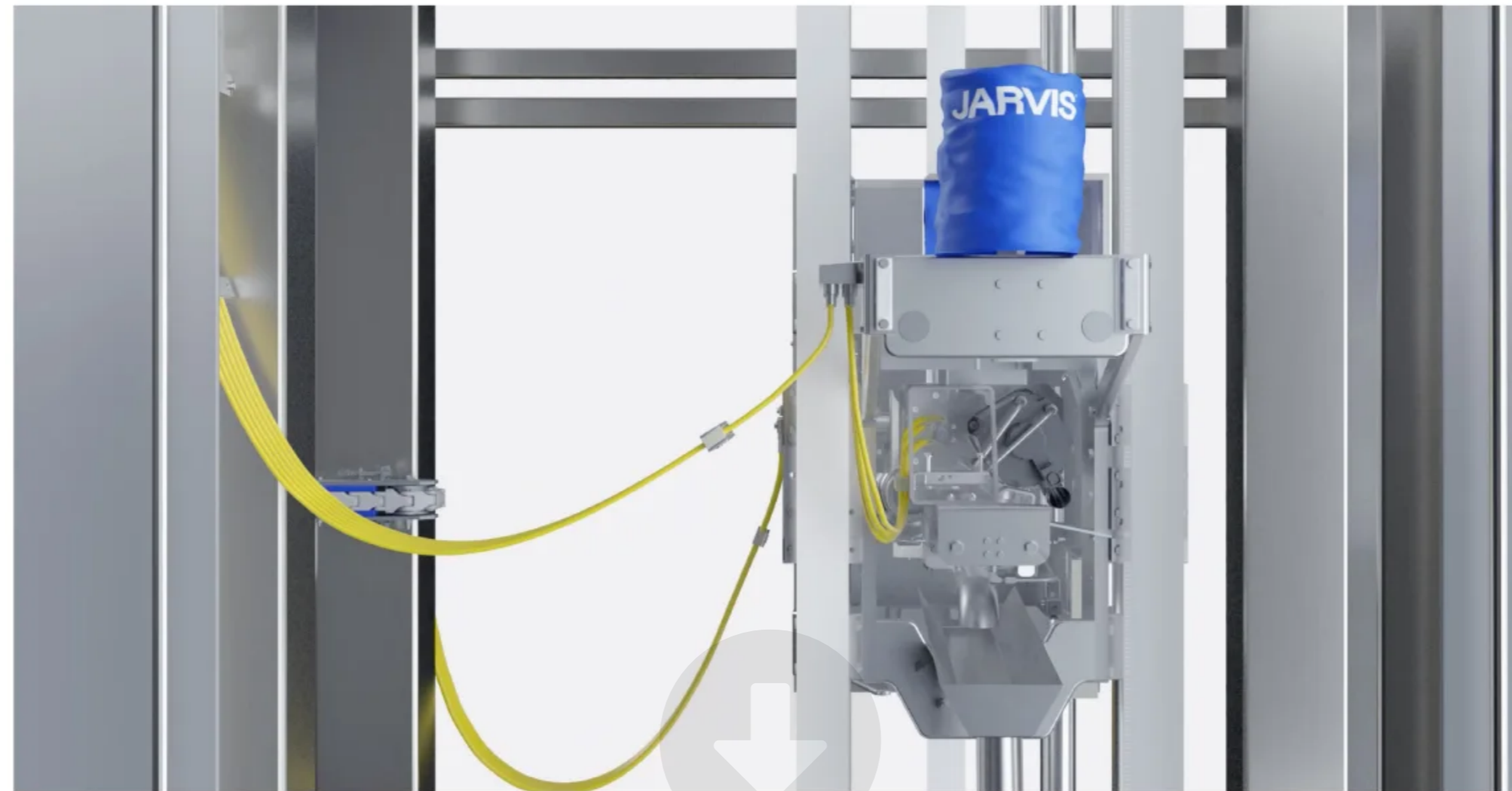
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SIGNATURE SAUSAGE SUPPORTS SALES

LUMBER JACK SMOKED SAUSAGE AND ITS EYE-CATCHING RETAIL CARTONS FUEL NORTHWARD EXPANSION FOR THE SAVANNAH, GA.-BASED PROCESSOR.

BY FRED WILKINSON
CHIEF EDITOR

Based in Savannah, Ga., Roger Wood Foods is a third-generation family-owned-and-operated food processing company with a primary emphasis on smoked sausage and savory smoked meats.

Roger Wood started the company in 1936. His son-in-law, Joseph Solana, took a leadership role at Roger Wood in the early 1960's, and his sons David, Matt and Mark joined their father at the company in the 1970's and 1980's. A true family affair, CEO and President David Solana credits his grandfather's vision and focus on quality products, innovation, and service as the foundation for the company's almost 88 years of growth and prosperity. Roger Wood Foods' growth trajectory, from a company with annual revenues of around \$6 million in the 1980's to more than \$50 million today has been fueled by extremely loyal consumers. Solana stated that "our success has come organically as later generations of consumers have followed their parent's love of the company's products."

Innovation and embracing industry changes have been important factors in the company's journey. David Solana recalls when Roger Wood Foods went from state to federal inspections in 1981, and the company took the opportunity to expand its market into South Carolina and then North Carolina, Virginia, and Florida.

"We have an iconic product that is our signature offering. We call it Lumber Jack Smoked Sausage. My brother is the one that came up with this name years ago, and the brand has gained tremendous recognition" Solana said.

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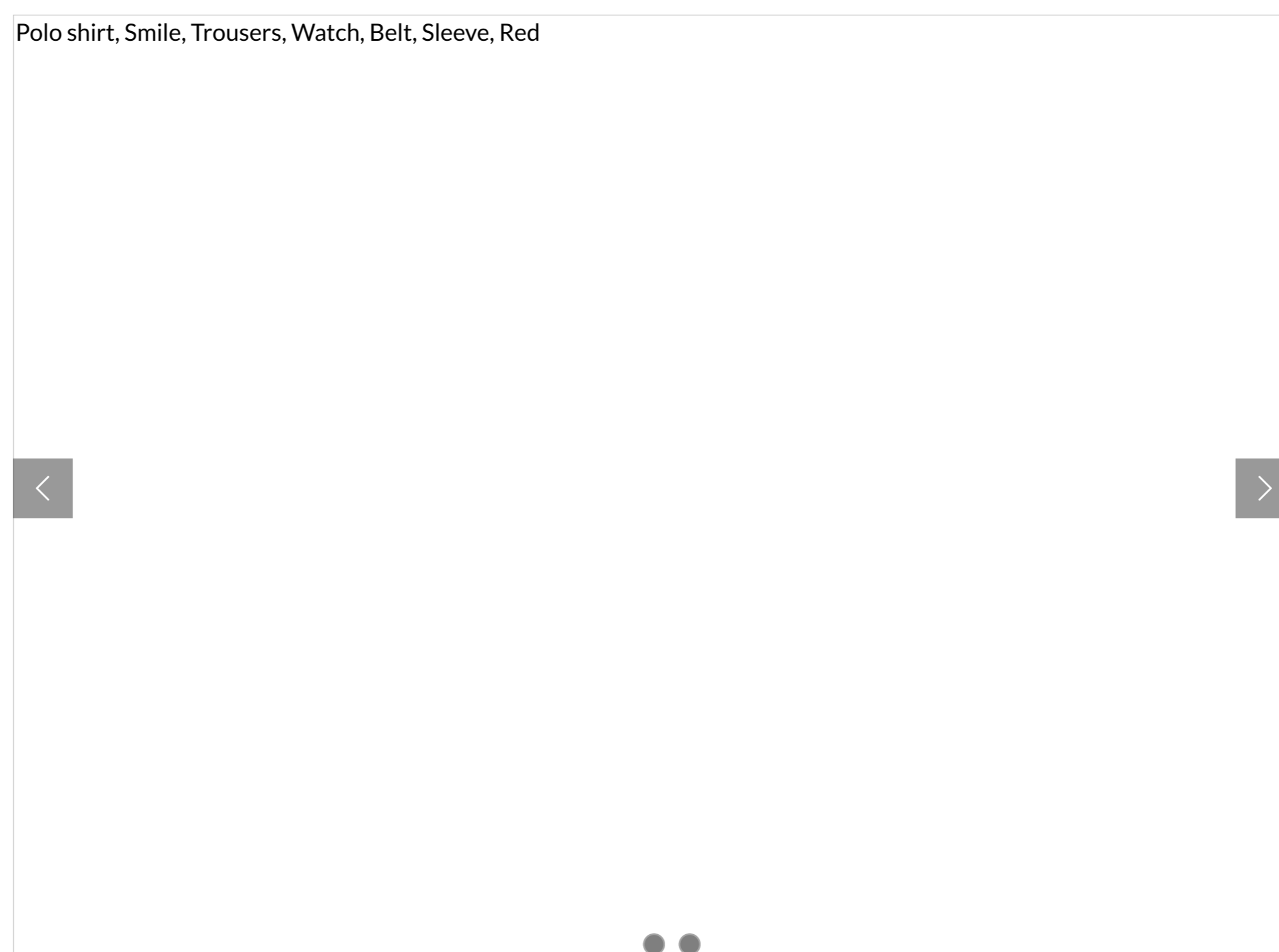
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Lumber Jack is a smoked sausage seasoned with a blend of sage and peppery spices in a natural casing and is smoked with oak and hickory. Solana credits Lumber Jack's natural casing for giving the smoked sausage its signature eating quality and differentiation from competitors offerings. Solana also credits Lumber Jack's display-ready cartons for helping the product stand out in the



Solana believes that value is an important component of the company's past and future success. "We have a product that's priced for a family on a budget but has the same bite, texture and overall eating quality of a more expensive product. We have focused on the consistency of the spices and texture, which in turn has endeared the Lumber Jack brand, and all of our products, to our faithful customers."

The company also focuses significant effort on refining and innovating its internal workflow. "From an operations perspective we have simplified our processes to be repeatable, efficient and effective. This has allowed us to rapidly identify defects and minimize any impact on production and customer satisfaction" he said. Solana went on to say, "We taste-test our products every single day. We want to personally experience what the customer is purchasing and how they are using it in various dishes. We encourage all our associates to get involved with understanding our product to make sure that they can intimately relate to the consumer experience."



David Solana (left), president, CEO and owner of Roger Wood Foods, and Mark Boles, sales manager.

Solana has worked hard to craft a workplace culture that can be described as team focused, family-oriented, and rewarding for all employees. These efforts have resulted in a tenured, loyal, and effective leadership team that takes personal ownership of the company's success.

After more than 40 years at Roger Wood Foods, David Solana remains excited about the company's future and proud of its legacy.

Image credits: Doug Peckenpough



KEEPING THEIR COOL

PROCESSORS NEED ENOUGH COLD STORAGE TO MEET CURRENT NEEDS AS WELL AS ANTICIPATED GROWTH.

BY FRED WILKINSON
CHIEF EDITOR

Among the top priorities for suppliers and handlers of meat and poultry products is keeping their cool – literally.

Ensuring access to adequate cooling capacity is a key consideration for processors and suppliers that handle regional and/or local refrigerated storage and delivery of meat and poultry products.

Processors need enough cold storage to meet current production and handling needs as well as anticipated growth, said Dan Parsenow, regional sales manager for Polar King International Inc., adding that moving processors' cold storage outside their facility or adding cold storage outside frees up room inside their facility to be used for processing.

"They don't want to cut themselves short but also don't want too big of a walk-in where they are cooling a lot of empty space," Parsenow said. "Consider redundant refrigeration to ensure back up in case a system was to go down and temperature monitoring with alarm so you can be notified of a problem."

As costs for refrigerated storage space continue to increase, processors can help contain those costs by having their own cold storage, allowing them greater control over that portion of their business, Parsenow said.

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LOADING EFFICIENCIES

A crucial link in the cold chain and a potential source for inefficiency exists when loading or unloading frozen or refrigerated meat or poultry products from a refrigerated trailer at a loading dock.

The need to open trailer doors on the drive approach presents inefficiencies to the loading process, as either the driver or the dock attendant must leave their workspace to open the trailer doors before backing into the dock position, said Walt Swietlik, director, loading dock automation solutions for Rite-Hite.

"This increases the time to load or unload, and it exposes the frozen or refrigerated food to the outside environment," Swietlik said. "Depending on the length of exposure, this could result in damaged goods. Prevention of outside air infiltration during the loading

security and product temperature control," he said. "The same will happen as the trailer is reloaded and leaves the facility. The trailer doors are locked, and security tag is added inside the facility to help prevent any other outside interaction."

Due to labor shortages in many facilities, there is a need to automate processes to keep up with demand, and that includes loading and unloading product from refrigerated trailers. Adding automation in this area of product handling doesn't necessarily mean replacing workers but finding areas that can free up workers to do roles better suited to their job, Swietlik said.

"Facilities can choose the right ratio of automated vs. manual processes to best meet their needs and increase productivity," he said. "No matter the level of automation chosen, it's important to select partners early in the planning process to collaborate with every step of your automation journey."

With labor issues escalating and consumer preference rapidly growing, cold storage services solutions provider Lineage Logistics determined the answers lie in adding automated functionality to their facilities, said Brian Beattie, president Western U.S. operations for Lineage Logistics.

"Our data science team is constantly working to create the most efficient cold chain warehouses in the world," he said.

That includes designing and engineering simulations that result in the development of specific technologies to solve the company's most challenging operational problems, which include waste in the supply chain, ensuring trucks are at the right place at the right time and reducing the amount of time team members are exposed to the freezing temperatures of the facilities.

"Automation at Lineage is also core to our commitment to energy efficiency and sustainability," Beattie said. "We combine deep institutional knowledge with industry-leading transformative thinking to implement several energy reduction technologies that are achieving dramatic decreases in consumption. As an example, flywheeling, an innovative process that proactively manages energy consumption, lowered our energy usage by 34% – an annual savings of 33 million kilowatt hours, in the first three years."

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REGULATORS CONTINUE TO HARNESS THE POWER OF WGS

WHOLE GENOME SEQUENCING OFFERS HEALTH DEPARTMENTS AND REGULATORS A POWERFUL TOOL TO IDENTIFY AND SOLVE FOODBORNE ILLNESS OUTBREAKS.

BY SHAWN K. STEVENS
FOOD INDUSTRY COUNSEL LLC

In recent years, continued improvements in genomics technology have led to a substantial transformation in the ways that foodborne illness outbreaks are identified and solved. Whole Genome Sequencing (WGS) has emerged as a powerful tool for health departments and regulators to identify and solve foodborne illness outbreaks more effectively than ever before. This cutting-edge technology provides a detailed genetic blueprint of pathogens (a DNA signature, so to speak), enabling health officials to identify emerging foodborne illness outbreaks, trace the source of those outbreaks, and prevent further illnesses.

WGS is a scientific technique that maps the entire genetic makeup of an organism, including bacteria responsible for foodborne illnesses such as *Salmonella*, *E. coli* O157:H7 (and non-O157:H7 STECs), and *Listeria*. By sequencing the genomes of these pathogens, health departments and regulators can gain valuable insights into their genetic diversity and relatedness.

In turn, WGS allows for faster and more accurate identification of the source of an outbreak. By comparing the genetic fingerprints of pathogens from different cases, health officials can pinpoint the exact strain responsible for the outbreak and trace it back to its source, whether it's contaminated food products, production facilities, or food handlers.

WGS data is continuously uploaded to national databases (such as the GenomeTrakr), creating a network of information sharing. This enables health departments to monitor the spread of pathogens in real-time, detect emerging clusters, identify threats, and respond swiftly to potential outbreaks before they escalate.

With a clearer understanding of the genetic makeup of pathogens, health departments can implement more targeted and effective interventions. They can identify common sources of contamination, address specific risk factors, and work with the food industry to improve safety practices.



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Finally, health departments can use WGS data to identify trends and patterns in foodborne illnesses over time. This information can lead to the development of targeted prevention strategies and policies that, in theory, will protect public health more effectively.

WGS has revolutionized the way health departments and regulators identify and respond to foodborne illness outbreaks. Its precision, speed, and ability to provide critical genetic information have empowered government entities to respond more quickly to contaminated food. As technologies continue to advance, WGS is likely to play an even more significant role in preventing and mitigating foodborne illness outbreaks.

And, remember, the regulators are increasingly using WGS when performing food safety assessments in establishments, using the technology to type any strains they might find in the processing environment. So, this is one more reason for companies to ensure that they remain vigilant when executing cleaning and sanitation programs. With regulators now routinely harnessing the power of WGS, it is increasingly likely that, if a resident strain exists in your processing environment, it will be found.

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IPPE CONVENTION PREVIEW



GOING BIG AT IPPE 2024

IPPE'S SHOW FLOOR EXPANDS TO INCLUDE FOUR HALLS.

BY GWEN VENABLE
USPOULTRY

The International Production & Processing Expo (IPPE) is excited to be back in Atlanta. IPPE's show floor has expanded to include four halls: A Hall, B Hall, B/C Hall and C Hall; and it is the largest trade show floor ever! You will EXPERIENCE IT ALL, including the latest technology, equipment and services for your business and world-class education, while connecting with other animal food, meat, and poultry and egg professionals from around the world. It's all at IPPE 2024.

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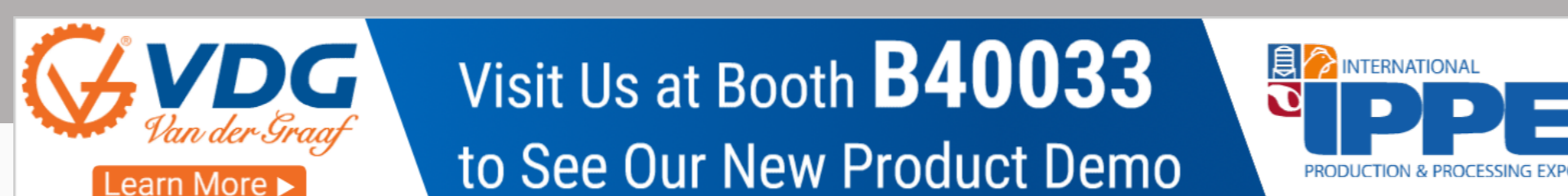
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IPPE education programs will be held from Monday, Jan. 29, 2024, through Friday, Feb. 2. The future of our industry depends on today's forward-thinking decisions. IPPE offers more than 80 hours of learning sessions from industry experts and thought leaders. Experience some of the programs you have come to expect each year, such as the International Poultry Scientific Forum (IPSF), Latin American Poultry Summit, Pet Food Conference and the International Rendering Symposium. Also, make plans to attend some of the new educational programs, including the Food Safety Design Principals Workshop; Feed Your ESG: How Feed Will Help Hit Sustainability Targets; and USDA-APHIS a Dialogue and Digest.

IPPE would like to provide a special thank you to the following sponsors that make it possible for qualified attendees from member companies of all three associations engaged in the production of poultry, eggs and meat for consumption, production of feed, and for pet food manufacturers to attend for free. The Members to Atlanta program (M2A) is supported through the sponsorship of these elite exhibiting companies: Aviagen Inc., Ceva, Cobb-Vantress LLC, Elanco Animal Health, Georgia Poultry Equipment Company, Heat and Control, Inc., Huvepharma, Jamesway, Kemin Animal Nutrition & Health - North America, Soybean Meal Information Center, Vetagro Inc. and Zoetis. We sincerely appreciate these companies for their continued support of the M2A program and invite you to stop by their booths to see the latest products and services they have to offer.



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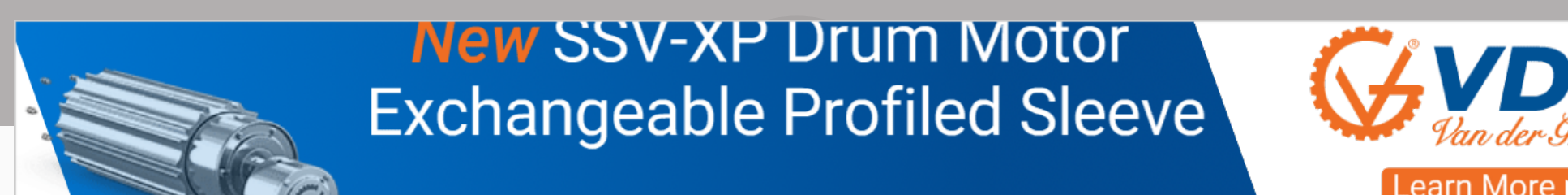
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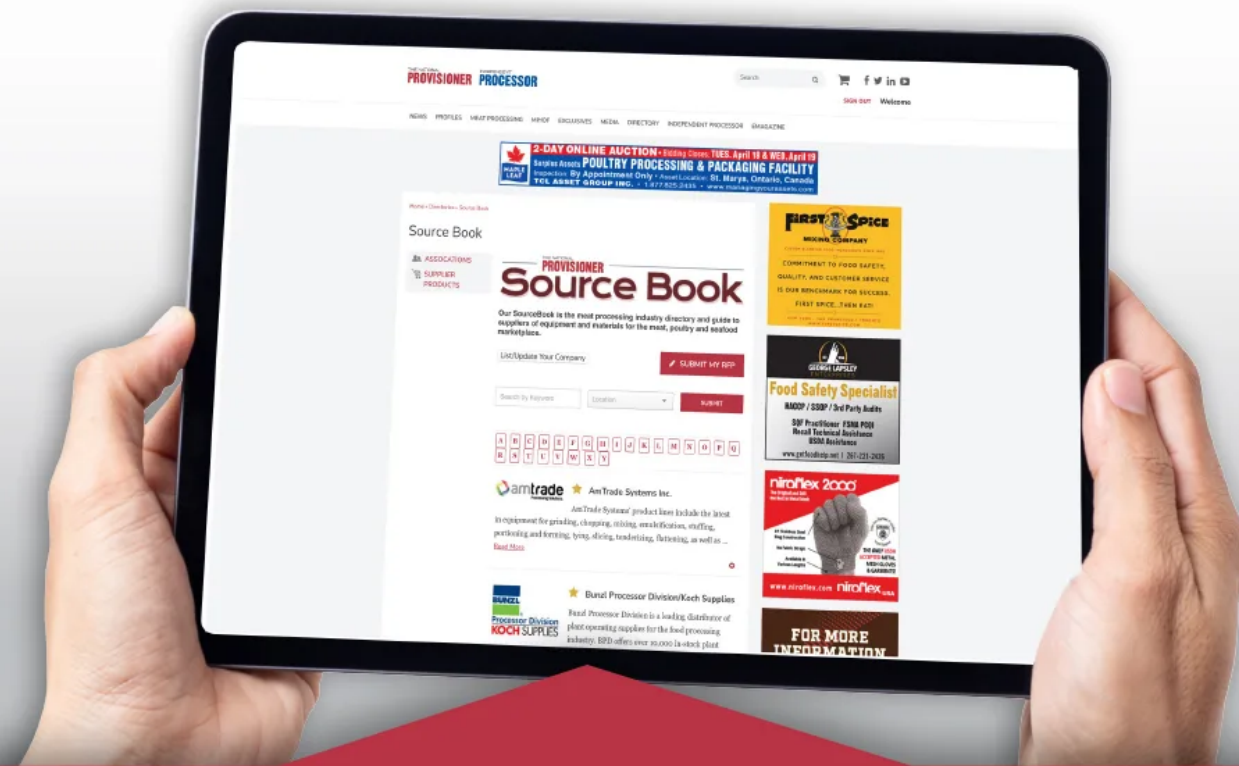
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CHICAGO-BASED GREENRIDGE NATURALS

HONORS EUROPEAN AND MIDWESTERN HISTORY



GREENRIDGE FARM REBRANDS TO GREENRIDGE NATURALS.

BY SAMMY BREDAR
ASSOCIATE EDITOR

Chicagoland-based Greenridge Naturals has had a whirlwind 2023. After recently experiencing exponential growth, the company decided to rebrand in a way that emphasizes its focus on natural and clean products.

While the company still offers the same products it did before, the previously named Greenridge Farm rebranded to Greenridge Naturals, offering its customers a new logo, website and packaging.

The new website features a platform for consumers to directly purchase Greenridge products, expanding the company's reach.

"We are excited to bring our brand to the larger national market with our new branding, as well as expand our product portfolio," said Sebastian Madej, co-founder of Greenridge Naturals.

Madej said that he and his brother first founded their business back in 2008, seeking to recreate clean-label meat products featuring foods inspired by their childhoods in Poland.

"Fresh, hardwood smoked cuts of meat made with the freshest and highest quality ingredients where you can really taste the full flavor of the beef, chicken, turkey, and ham," Madej said.

Though Greenridge Naturals honors its European heritage through its products, the company is also paying homage to its Midwest background with the new Italian-style beef with giardiniera snack stick flavor. This company is also capitalizing on current flavor trends, offering another new snack stick flavor: Buffalo Chicken.

"We also wanted to offer customers a chicken option in the new snack size format and the buffalo-style flavor seemed obvious, a popular flavor across so many snacking categories," Madej said. "Our in-house team developed both flavors, testing for months to create the best recipe for each, and we are excited to get all our snack sticks to market in both major retailers and C-stores."

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varying flavor preferences.

"Our snacking sticks are [a] top seller along with many of our sausages and deli meats. We have a number of items across the deli meats, snack sticks, and sausages that are really popular within their own categories," Madej said.

As first-time exhibitors at NACS in October 2023, Greenridge Naturals not only released these two new snack stick flavors, but additionally launched new snack-size versions of their beef and chicken sticks, developed for C-stores.

Flavor trends aren't the only consumer priority Greenridge is paying attention to. This family-owned company offers natural/clean products because it has the same priorities as its consumers.

"We are committed to providing products that taste how they should with no additives," Madej said. "The flavors really shine through with this approach and we find it resonates with the customer as well, they know what they are eating and can feel good about what they give their families."

Though Greenridge has revamped its entire brand, the company isn't stopping there. Going into 2024, Greenridge is expanding their production facilities, aiming to offer more variety for its customers.

"Currently under construction, our slicing facility will allow us to produce our all-natural deli meats in a sliced format, that will really cater to the convenient on-the-go options that we've seen a huge increase in, during the past couple of years. This is part of our larger expansion plan going into 2024 to offer more sizing and packaging options," Madej said.

Photos courtesy Greenridge Naturals



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PORK DEMAND HOLDS FAIRLY STEADY

USDA FORECASTS PORK PRODUCTION TO INCREASE SLIGHTLY THROUGH 2024.

BY FRED WILKINSON
CHIEF EDITOR

U.S. pork production is forecast to hit 27.2 billion pounds for 2023, according to the U.S. Department of Agriculture's November 2023 U.S. red meat and poultry forecast, marking a slight increase from USDA's 2022 production total of just under 27 billion pounds.

The agency sees this upward production trend continuing through 2024, with pork production predicted to exceed 27.7 billion pounds for the year.

USDA market research suggests a similar upward trajectory for U.S. pork exports, with 2023 predicted to surpass 6.7 billion pounds (up from more than 6.3 billion pounds in 2022) and increasing again in 2024 to just under 7 billion pounds.

At retail, pork sales trends have been marked by declines. For the 52 weeks ending Oct. 29, 2023, fresh pork sales weighed in at \$6.9 billion, a decrease of -5.4% from the previous year at the same time, according to Circana market research. Pounds sold for fresh pork were down -3.6% for that time period, as well.

For processed pork products, breakfast sausage, dinner sausage and smoked ham all enjoyed modest growth in sales for the 52 weeks ending Oct. 29, 2023, with breakfast sausage sales coming in at \$2.2 billion (up 0.5%), dinner sausage sales at \$4.9 billion (up 1.3%) and smoked ham sales at \$1.6 billion (up 2.6%). All three product categories saw pounds sold fall for that timeframe – down -1.3%, -0.6% and -1.2%, respectively.

For bacon, sales for that time period were \$5.9 billion, down -8.2% -- while pounds sold grew slightly at 0.5%.

"When it comes to pork products, bacon continues to be a perennial favorite among consumers," said JD Enrici, vice president of sales and marketing for Coleman Natural Foods. "We have seen growth in demand for Coleman Natural Food products such as Hickory and Applewood-Smoked Bacon."



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dishes, such as ham and pork belly, adding, "Despite inflation's effects on other meat category prices, pork has declined in cost over the last 12 months; this could help boost demand even more than typical years."

Enrici said Coleman Natural Foods is working to expand its bacon portfolio, as well as looking at new cuts and products that can meet consumer demand for new flavors and global cuisines that highlight pork's versatility, from pork belly in ramen to ground pork for dumplings and stir-fry dishes.

"Market research firm Datassential highlighted pulled pork as one of the top flavor trends this past summer, and we anticipate seeing that carry into the fall and winter as consumers seek out more savory, hearty dishes," he said. "With inflation creating a higher cost in other meat categories, pork has remained steady and has been, and is, a cost-effective option consumers consider more often. It is also a versatile protein that is easy to prepare."

Enrici said increased interest in global cuisines, new cooking methods and food hacks, and recipes driven by social platforms like Instagram mean that consumer food trends are evolving faster than ever before.

"Smoked and spicy are two big flavor profiles that have continued to generate high consumer interest," Enrici said.

He said an emerging consumer trend for pork is the increasing importance of animal welfare when it comes to purchasing decisions.

"It's clear that consumers are taking a more thoughtful approach to buying meat, including pork -- 49% report making an effort to buy from companies that care about animal welfare, according to the Power of Meat report from the North American Meat Institute and FMI," he said. "As consumers become more educated and engaged on where their food comes from, we are seeing strong demand for all-natural products that are free from antibiotics, hormones, and artificial ingredients. Sales of meat with antibiotic-related claims remained strong over the past year."

Relatedly, he said, one of the biggest developments has been Proposition 12 in California, which bans the practice of confining pregnant sows in gestation crates.

"We were one of the first national producers to be crate free, ensuring our hogs are raised in environments that eliminate confinement and allow animals to express normal behavior, with ample space to move during gestation and after giving birth," he said.

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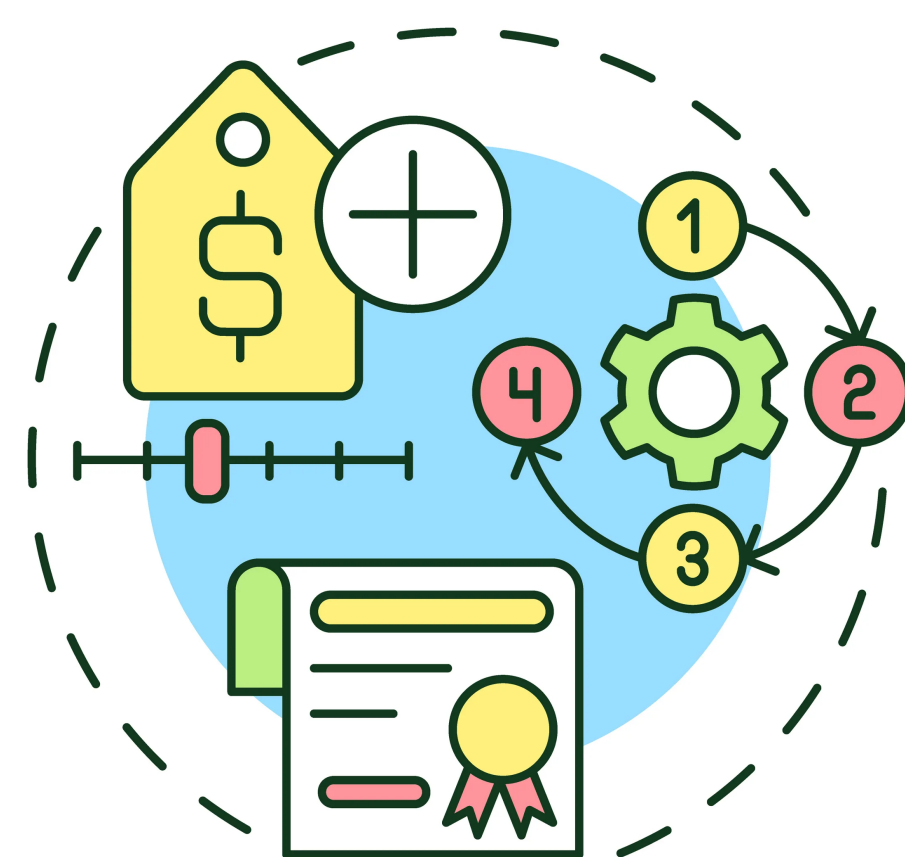
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EPR LEGISLATION



POSES CHALLENGE TO PROCESSORS

EXTENDED PRODUCER RESPONSIBILITY REGULATORY OVERSIGHT AT THE STATE LEVEL BURDENS THE PACKAGING INDUSTRY.

BY LACY BATES
SOUTHWEST MEAT ASSOCIATION

PRESERVE AND PROTECT

"I do solemnly swear that I will faithfully execute the Office of President of the United States, and will to the best of my Ability, preserve, protect and defend the Constitution of the United States." The Oath of Office for the presidency can be seen and heard on every television in the United States on Jan. 6. The president and the U.S. Congress have the highest duties of preserving, protecting and defending the United States of America. Meatpackers and processors along with the packaging industry are required to meet the highest standards for food preservation and protection. It can go without saying that our industry is continuously under fire from activism to an overabundance of burdensome regulations.

It was brought to the Southwest Meat Association's (SMA) attention that the packaging industry is experiencing such burdensome regulatory oversight at the state level, commonly known as Extended Producer Responsibility (EPR). The expense of EPR will ultimately lie in the hands of meat and poultry processors. Today, EPR bills have already passed in four states, and currently 11 states have similar bills on the desks of state congressional offices.

WHAT IS EXTENDED PRODUCER RESPONSIBILITY?

This policy assigns producers of products (e.g., packaging paper, single-use products, beverage containers or foodservice products) fiscal responsibility for collecting, managing, recycling, and/or composting the products after consumer use.

WHO IS A PRODUCER?

The producer can be defined as the person/company that is the brand owner of the packaged product or, if the product brand owner has no U.S. presence, the producer can be a sole importer of the product into the state. Some states have implemented exemptions for producers, such as nonprofit organizations, companies using less than 1 ton of covered materials for products, agricultural companies with less than \$5 million in gross revenue, charities and government institutions. Each state has different producer exemptions. Therefore, it is important to contact state officials if your state is entertaining EPR proposals.

definition, each state can illustrate exemptions for covered products.

WHO OVERSEES THE EPR?

The financial structure may vary, but in most EPR programs producers pay fees to a Producer Responsibility Organization (PRO). The PRO then distributes the funds to cover the costs required by EPR legislation. Costs provide funding for the end-of-life management of covered products (collection, sorting, recycling).

WHAT STATES CURRENTLY HAVE PASSED EPR BILLS?

Maine, Oregon, Colorado and California.

WHAT STATES HAVE INTRODUCED EPR PROPOSALS IN 2023?

Connecticut, Hawaii, Illinois, Maryland, Massachusetts, New Jersey, New York, North Carolina, Rhode Island, Tennessee and Washington.

CALIFORNIA CONTINUES TO SET ITSELF APART FROM THE OTHER THREE EPR STATES. HOW SO?

California's EPR bill (S.B. 54) puts extraneous constraints on producers. The bill states all covered materials must be recyclable or compostable by 2032. All plastic covered material must be recycled at a rate of 30% by 2028, 40% by 2030, and 65% by 2032. Also, by 2032 producers in compliance with a PRO must source reduce covered materials 25% by weight and 25% by number of plastic components.

IMPLICATIONS OF EPR BILLS

The implications of EPR programs to the meat and poultry industry could cause additional regulatory hardships, especially to very small and small establishments. The packaging industry has continued to work diligently to ensure packaging preserves and protects the wholesomeness and freshness of perishable products while keeping consumer health and safety at the forefront. The passage of EPR bills by state lawmakers have important consequences for our industry, including reducing shelf life of perishable meat and poultry products, jeopardizing food safety, increasing food waste, and raising food insecurity in the United States.

Packaging, regardless of product, is not a 'one size fits all' industry.

As we begin to see more EPR bills come into play, let us all take an Oath to continue preserving, protecting, and defending our industry.

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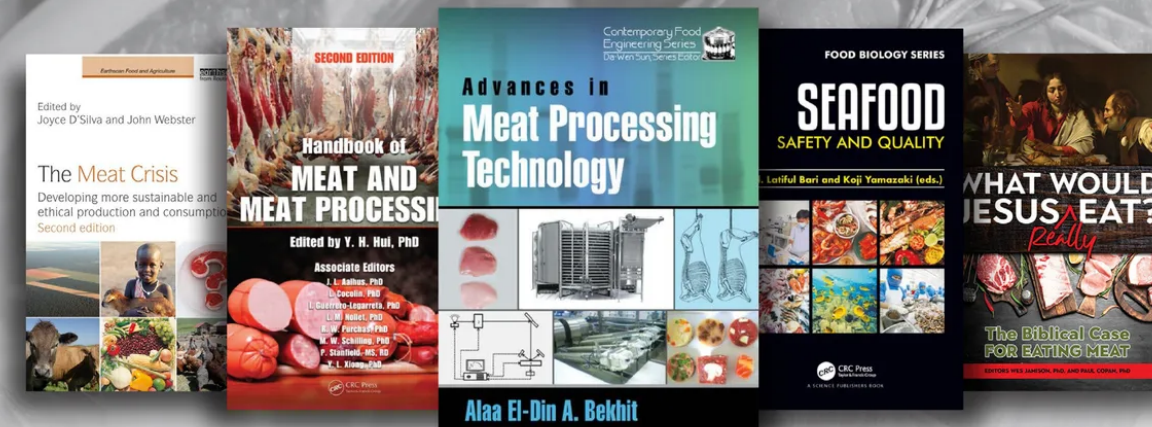
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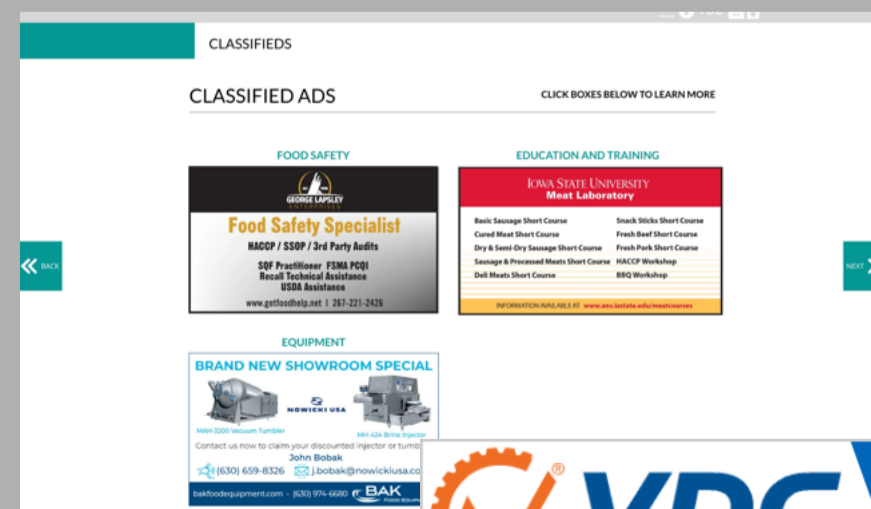
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