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CONSUMER TRENDS REPORT 2023: WARY CONSUMERS HUNGER FOR VALUE

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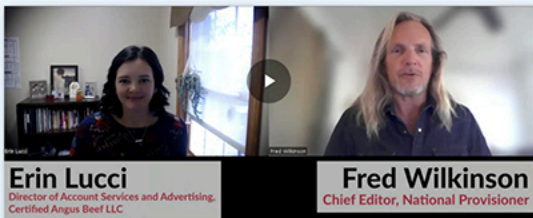
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Erin Lucci
Director of Account Services and Advertising,
Certified Angus Beef LLC

Fred Wilkinson
Chief Editor, National Provisioner

APPROACHES TO ROAST SEASON MARKETING

Cooler weather is settling in across much of the U.S., bringing seasonal comfort foods to top of mind for many consumers – and for many that means beef roasts are on the menu. Erin Lucci, director of account services and advertising with Certified Angus Beef LLC, shares some thoughts about marketing beef roast products, including opportunities for strip loin roast.

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4. Firehouse Subs brings back the King's Hawaiian Pork & Slaw Sandwich for a limited time
5. Hormel Black Label introduces Apple Cider Bacon



MOST-POPULAR FEATURES:

1. 2022 Top 100 Meat and Poultry Processors
2. The Deli Report 2023: Manufacturers help energize the category
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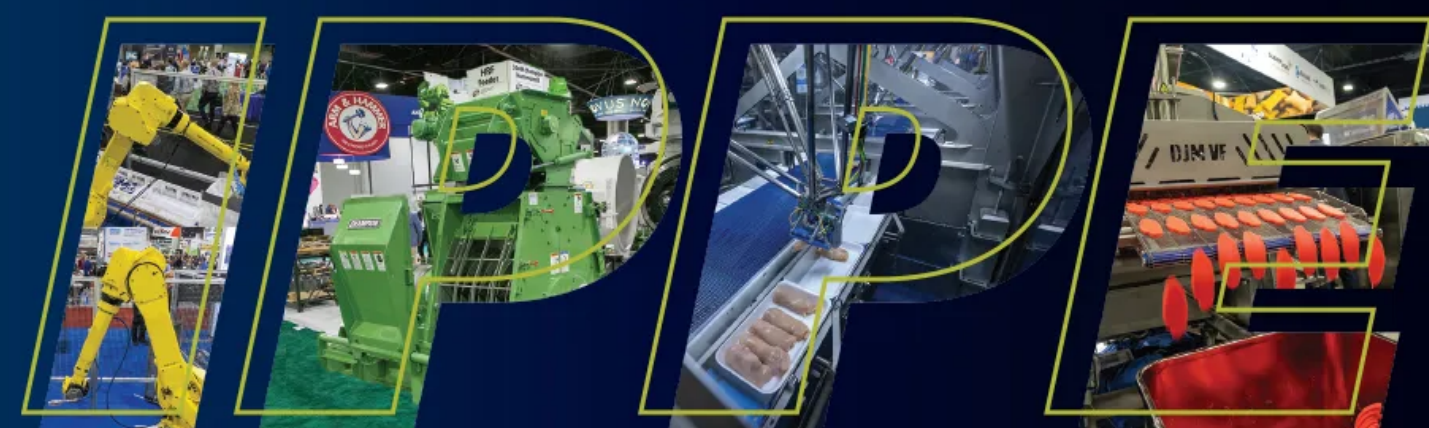
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THE U.S. CONSUMER IS SHOWING SIGNS OF EXHAUSTION, SO PRICE AND CONVENIENCE PROVE KEY.

BY FRED WILKINSON
CHIEF EDITOR

Throughout 2023, the U.S. economy has enjoyed solid consumer demand, but robust consumer spending appears positioned to decline.

Households that had built up cash savings during the pandemic (thanks in part to government stimulus efforts) have seen those reserves dwindle, according to investment firm [Morgan Stanley](#). Economists now estimate household savings to be around \$350 billion, which consumers may run through as soon as the first quarter of 2024. On top of that, millions of Americans are facing financial burdens including reinstatement of their student loan payments along with mounting credit card debt at a time with interest costs that have soared to highs not seen in more than a generation.

The majority of younger Americans report they have **reduced spending** in response to persistent inflation over the past year, according to a Bank of America survey, with 73% of Gen Z consumers (ages 18 to 26) saying increased prices have made them change their lifestyles. Nearly half (43%) say they are cooking at home instead of dining out, and a third report cutting back on grocery purchases.



MAKING CONVENIENCE AND VALUE EASY:
Stephanie Lind, Catherine Porter and Mark Di Domenico of market research firm Elohi Strategic Advisors discuss consumer trends, value-added protein opportunities and more in this podcast.



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This less-than-sunny outlook looks to endure, with a majority of survey respondents saying they did not expect the economy to improve in 2024.

On a more optimistic note, the pandemic reinforced for many consumers the importance of forming connections with other people. Companies can capitalize on this trend by innovating products that play into fostering relationships and partnerships among family members and individuals, according to research from Mintel Group.

But the consumer quest for connection at mealtime is tempered by economic reality.

At-home meal preparation patterns continue to be affected by the sustained pressure on income, according to a Circana survey that found nearly one-quarter of consumers are doing more from-scratch cooking. Nearly half (42%) report doing more with leftovers.

At the grocery store, survey findings suggest consumers increasingly are looking to capitalize on sales promotions and sticking to simpler ingredients to help balance their food spending, with 89% of consumers continuing to perceive groceries as being more expensive than they were a year ago.

Circana consumer research finds that popular savings measures for shoppers include looking for sales specials more often (58%), cutting back on non-essentials (49%) and purchasing private-label products (39%). In a cautionary finding for new product development, consumers are also sticking to routine purchases more frequently, with only 16% looking for new and different products.

While inflationary prices are eating into restaurant dining, consumers are looking to make everyday at-home dining a little more special, with ingredients such as spice blends that can elevate meals at home for a restaurant-quality eating experience.

“WHILE INFLATIONARY PRICES ARE EATING INTO RESTAURANT DINING, CONSUMERS ARE LOOKING TO MAKE EVERYDAY AT-HOME DINING A LITTLE MORE SPECIAL, WITH INGREDIENTS SUCH AS SPICE BLENDS THAT CAN ELEVATE MEALS AT HOME FOR A RESTAURANT-QUALITY EATING EXPERIENCE.”

According to consumer research from market analysis firm Elohi Strategic Advisors, meat eaters remain the dominant group in the U.S., and they rank animal welfare, local sourcing, antibiotics use, processed foods, climate change, sustainability and food waste as concerns that affect their purchasing decisions for meat products. While these concerns influence food choices overall, consumers say they like to eat more healthy items at home while indulging for away-from-home eating occasions.

According to the Specialty Food Association, bargain-hungry consumers are willing to pay for perceived **value**, and brands must successfully demonstrate their value proposition by engaging consumers and showing them what their products can offer, whether ease of preparation, versatility or improved shelf life. Consumers will continue to look for ways to make the most of the taste and quality of their food while becoming more open to using shortcuts that can help them easily achieve this. Whether for home-prepared meal occasions or grab-and-go meal solutions, value-added convenience will continue to drive consumers' purchasing decisions.

A positive note from the Specialty Food Association: Charcuterie boards' popularity is expected to endure in 2024. Charcuterie boards can appeal to consumers' definition of value with their combined visual appeal, cost-effectiveness, ability to be shared for communal dining, adaptability to diverse dietary preferences and diverse ingredients that can satisfy their demand for elevated, unique food presentation at get-togethers.

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FINDING SUCCESS THROUGH
EMPLOYEE SATISFACTION



FINDING SUCCESS THROUGH EMPLOYEE SATISFACTION

TEXAS-BASED JUNIOR'S SMOKEHOUSE PRIORITIZES BOTH ITS EMPLOYEES AND CUSTOMERS.

BY SAMMY BREDAR
ASSOCIATE EDITOR

El Campo, Texas-based Junior's Smokehouse officially opened in 2005, but the business's namesake began working with meat long before that. Gerhard Drechsler, director of business development, sat down with *The National Provisioner* to discuss Junior's Smokehouse.

Drechsler said that Junior Herzik began as a rice farmer, but he eventually got into smoked meats after finding that rice was not lucrative enough.

After working with his son, Junior and his son-in-law then ventured into retail, opening their own store. Drechsler said that, after stopping at the retail store one day, a retail chain brought them on as a private-label supplier.

Junior's Smokehouse had to later sell their retail storefront, though, due to demand.

"While producing for the initial private-label customer, the company picked up new private label business, requiring two separate expansions, one for production capacity and the other for warehousing," Drechsler said. "The plant now produces roughly 4,000,000 lbs of jerky annually between private label business and the Uncle Ervin's brand."

Junior's Smokehouse does nationwide retail sales and a lot of private label, but they are just now venturing into their own brand, Uncle Ervin's Premium Texas Jerky.



Seven current flavors with three new ones on the way. Photo taken in-house by Junior's Smokehouse.

Though Junior's Smokehouse frequently utilizes automation, they prefer to make the actual meat snacks by hand, emphasizing how important tradition is to them.

"We really try to keep that authentic product quality that Junior established 36 years ago. And he comes in and he tests our products," Drechsler said. "[That's] his legacy, and we have to honor that legacy."

The business's most popular products include their beef jerky and smoked sausages. "By marinating for 24 hours, hand hanging each slice, and processing in a very specific way, we create a jerky with a steak-like chew," Drechsler said.

After noticing a lack of flavor variation in the jerky category, Junior's Smokehouse set out to fulfill that hole in the market with its bold-flavor meat snack offerings. This includes the smokehouse's new product, a shelf-stable snack stick.

"We've came out with an amazing snack stick product, and we're going to mimic our jerky flavors," Drechsler said. This product is expected to roll out in Q1 2024.

The San Antonio Express News wrote an article in May 2023 titled "Battle of the Beef Sticks: Who makes the best meat snack for your next road trip?", recognizing the Junior's Smokehouse formulation for Best Overall Beef Stick and Best Texas Beef Stick.



Bohemian Garlic jerky. Photo taken in-house by Junior's Smokehouse.

Junior's Smokehouse now has to expand once again due to growth in sales. "We just completed a warehouse expansion, and now we'll start designing another expansion for production area," Drechsler said.

Looking at the Junior's Smokehouse business model, Drechsler said that they prioritize satisfaction of both customers and employees.

"We have two key groups that we have to focus on. Our customers, they have to get world-class product. And we have a no-questions-asked guarantee on our product," he said. "When you make your customers happy, and you keep your employees happy, our theory is then you therefore are keeping ownership happy. Because if your customers love you and your employees love you, how could you be going wrong?"

An essential component of Junior's Smokehouse is their company culture, called High Expectation Casual, which prioritizes the well-being of those they employ in conjunction with their performance standards. This company culture includes not only emotional well-being prioritization, but a guaranteed 40-hour weekly pay, regardless of the hours worked, in addition to bonuses for being consistently present.

The Junior's Smokehouse leadership also regularly meets with its employees to address any issues or concerns. "Most of their experiences are then taught through our World Class University, [where] we educate and coach others so they can develop competencies and expand their comfort zones," Drechsler said.

Re-engineering equipment to increase throughput is an important business component for Junior's Smokehouse. These efforts are a part of what Drechsler calls the World Class model, which means his business constantly strives to improve.

Drechsler said the aspects of the smokehouse's reengineering cycle include Spot, Thought, Vision, Action, Completion.

One example of Junior's Smokehouse's reengineering efforts — streamlining a bulk packaging process — happened shortly after Drechsler joined the business. This packaging process was reengineered once more when employees had a spat about a bag of jerky.

"Understanding what lay behind the argument led to critical observations that spurred another comprehensive reengineering, resulting in the packaging team more than doubling its throughput," Drechsler said. "Over the next 60 days, this event created several other changes that resulted in six days of production being accomplished in just four."

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GLOBAL AND SPICY FLAVORS FINDING FAVOR

CONSUMERS SEEK TO ELEVATE AT-HOME DINING EXPERIENCES. **BY SAMMY BREDAR**
ASSOCIATE EDITOR

As we approach the finish line for 2023, producers need to know what flavor trends to look out for in the coming year.

According to Elite Spice in “Meat Trends – From Simplicity to Revolution,” consumer demand is creating a need for more value in addition to increased luxury. This phenomenon is due to consumer perception of higher costs — they want the most bang for their buck.

“Gourmet experiences utilizing spices and chili peppers evoke feelings of luxury, specialty moments, and nostalgia,” according to Elite Spice.

The Specialty Food Association Trendspotter Panel observed similar trends in specialty food items, citing increased pleasure and convenience as trends for 2024.

Emma Pierce, brand manager for Prairie Fresh Signature, also noted a similar trend for convenience and value, as well as the popularity of spice and global flavors.

“In addition to spicy foods, we’ve also seen an uptick in at-home cooks returning to the basics with high-quality ingredients,” Pierce said.

The Prairie Fresh brand is offering products that directly cater to these two flavor trends. “In October (National Pork Month), we launched two new flavors — Nashville Hot and Hawaiian Sea Salt with Cracked Black Pepper — for loin filets in the Prairie Fresh Signature product line,” Pierce said.

The Hawaiian Sea Salt with Cracked Black Pepper product is a prime example of taking a traditional flavor profile and elevating it, creating that experience the customer desires.

The Specialty Food Association predicts the same as Pierce — a growth in at-home dining experiences, particularly in elevating common dishes. Chili peppers are a way to cater to multiple flavor trends at one time, utilizing global flavors in conjunction with spice.

“[Chilis] continue to trend but the market has crested on Sriracha and Gochujang so marketers are eager for the next thing to capture imaginations and tastebuds. Calabrian chili peppers are appearing in both conventional and slightly unconventional products,” according to the Specialty Food Association.

“IN ADDITION TO SPICY FOODS, WE’VE ALSO SEEN AN UPTICK IN AT-HOME COOKS RETURNING TO THE BASICS WITH HIGH-QUALITY INGREDIENTS,” PIERCE SAID.

“Flavorful wellness” is how Chef Rob Corliss, founder of culinary consultancy ATE (All Things Epicurean), describes the trend of consumers looking for “feel-good foods” that boast “complex spicy” flavors.

Corliss forecasts increasing popularity for Scotch bonnet, a chili pepper that is sweeter than but closely related to habanero, and both dry and wet jerk seasoning for meats.

According to the Specialty Food Association, “Not only is experimentation with flavors from around the world ongoing from a taste perspective, but consumers are open to richer cultural experiences from food.

The popularity of global flavors extends to seafood offerings. “Flavor trends for seafood products are following many of the major flavor trends across the food industry, including increased global influence (especially of Asian flavors like miso and Gochujang), flavor fusions (most notably sweet and spicy), and refreshing flavors like botanicals and citrus (grapefruit and yuzu, for example),” said Megan Rider, domestic marketing director, Alaska Seafood Marketing Institute.

ASMI cited their study findings that show the majority of consumers want help with their seafood cooking and recipes. Rider noted that cooking advice and recipes are a direct way producers can cater to consumer demand, addressing the need for cooking assistance while capitalizing on popular flavor profiles.

Looking to the year ahead, producers can meet consumer demand by utilizing value-added products to increase convenience and flavor. They can also innovate in flavors, prioritizing spice, global flavor profiles and elevated everyday foods.

Overall, consumers want it all: They want the novelty of new and exciting flavors, ease and convenience, but to save their dollars too. Consumers are craving new experiences through their proteins, and it is up to the industry to satisfy.

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THE EATS ACT IS INTRODUCED IN CONGRESS

THE ENDING AGRICULTURAL TRADE SUPPRESSION ACT WOULD PROHIBITS STATE AND LOCAL GOVERNMENTS FROM IMPOSING CONDITIONS ON THE PREHARVEST RAISING OF ANIMALS IN ANOTHER STATE.

BY SHAWN K. STEVENS
FOOD INDUSTRY COUNSEL LLC

Following the Supreme Court upholding California’s Proposition 12, which sought to limit how livestock intended for food to be sold in California could be raised, Congress introduced new legislation to limit the ability of states to regulate food products nationwide.

California’s Proposition 12, along with other state initiatives, set minimum requirements for the raising of animals used for meat sold in California, regardless of the state in which the animal was raised. The constitutionality of Proposition 12 was challenged on the basis that California should not be allowed to govern conduct occurring in other states and, after review, the Supreme Court upheld the Proposition 12 as constitutional. The Supreme Court stated, in the decision, that “Companies that choose to sell products in various states must normally comply with the laws of those various states.”

Now, in a broad effort to limit a state’s ability to regulate foods in interstate commerce, the Ending Agricultural Trade Suppression Act (EATS Act) has been introduced in both chambers of Congress. The Act prohibits states and local governments from imposing any conditions on the preharvest raising of animals in another state. Though the sponsors of the Act stated the Act is in response to California’s Proposition 12, the Act ultimately goes further to impact any state laws attempting to govern agricultural products produced in another state.



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Violations of the Act would allow any person, including producers and consumers, to bring a legal action to invalidate any offending state or local laws and regulation, and to seek damages for any economic loss resulting from the offending laws or regulations.

The Act has been referred to Committees in both the House and Senate for review, and, if passed, would be included in the next Farm Bill.

Proponents of the law indicate the Act would prevent overregulation by states, protect producers from overreaching regulations, and prevent states from interfering with the production of agricultural products in other states. On the other hand, opponents suggest that the EATS Act would roll back a substantial number of state regulations which are targeted to an individual state’s needs, including the preventing invasive pests and ensuring consumer safety. An assessment of the EATS Act suggests more than 1,000 potentially affected state laws could be overturned by the Act if passed.

Similar Congressional acts had previously been considered for the 2014 and 2018 Farm Bills, but ultimately were not included in those Farm Bills. Here, over 170 Representatives and 30 Senators have already expressed their opposition to the EATS Act. Thus, ultimate passage remains uncertain.

Because the current Farm Bill expired on September 30, 2023, Congress must work quickly to finalize and pass the new 2023 Farm Bill to prevent disruption to critical programs. As the proposed legislation continues to be refined, we will be watching with bated breath.

Indeed, if the EATS Act is not passed, California’s Proposition 12 could impose substantial burdens on the meat industry. In addition, it might even open the door to invite other states to pass similar rules, attempting to impose even more restrictions on the raising of livestock in other states.

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BY ALEXANDRIA RAMIREZ
AMERICAN MEAT SCIENCE ASSOCIATION

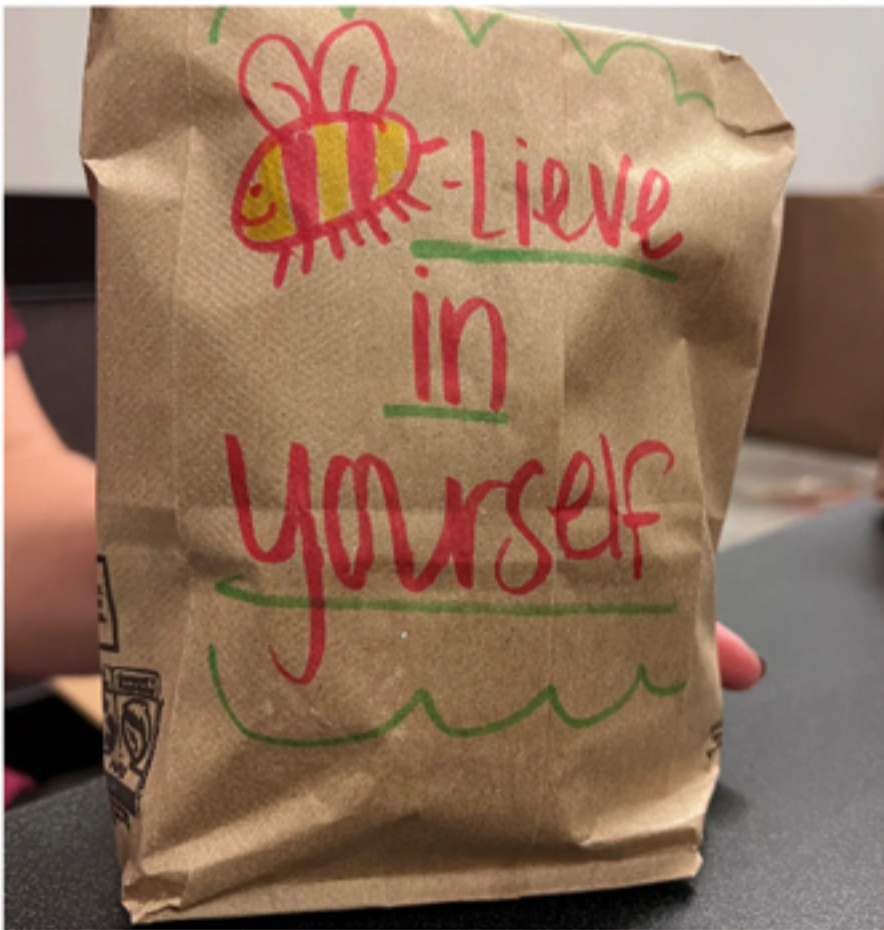
The American Meat Science Association (AMSA) teamed up with St. Paul Public Schools in a compassionate endeavor, distributing more than 700 high-protein snack bags to young students facing food scarcity. This initiative coincided with the AMSA 76th Reciprocal Meat Conference (RMC), which highlighted the pivotal role of meat in combating food insecurity within the United States. This thoughtful act allowed AMSA RMC attendees to give back to the local St. Paul youth, aligning with the conference's overarching theme of knowledge, innovation, and community.

Comprising a membership of more than 2,500 meat scientists and students from research institutions, meat processors, and meat supply companies both domestically and internationally, AMSA's membership is impactful. The cornerstone of its annual calendar is the RMC, an interactive scientific gathering covering the latest research and hot topics surrounding the production and distribution of animal protein products. Attended by a diverse group of students, professionals, and technical experts from academia, industry, government, and other sectors, the conference serves as the center for knowledge exchange and innovation.

During this year's RMC in St. Paul, AMSA's spirit came to the forefront. With careful planning and support from the host committee, Hormel Foods Corp., alongside the aid of Jill Westlund, St. Paul Public Schools' Nutrition Coordinator, the execution of the service project surpassed all expectations.

In expressing her admiration, Jill Westlund said, "I was inspired by the amount of work that the AMSA planning committee was willing to do behind the scenes to make this happen. Their generosity and determination were amazing."

Ahead of the conference, the planning committee sought donations for the snack bags, which included the original CORN NUTS donated by Hormel Foods; Jack Links Sweet Barbeque Chicken Tender Bites donated by Jack Link's Protein Snacks; Edes Meats donated Beef Snack Sticks; and Tyson Foods Inc. provided a coupon for each bag.



One afternoon was earmarked during the conference for attendees to contribute their time and energy towards assembling the snack bags. The bags even featured uplifting messages and images, reflecting the commitment of AMSA attendees to spread positivity. An extra special touch included an encouraging, handwritten note by participating AMSA members.

This activity provided an impactful avenue for AMSA members attending RMC to give back to the host community. AMSA CEO Collette Kaster acknowledged, "It was a great privilege to integrate this activity into the Reciprocal Meat Conference. Not only did it tie in with some of our programming on food scarcity and the availability of high-quality meat and protein products, but it also represented an initiative near the hearts of many of our members. We thank our product sponsors and the St. Paul Public School District for facilitating this unique opportunity."

Just before the Independence Day holiday weekend, the snack bags reached two schools catering to kindergarten through eighth-grade students.

Jill Westlund extended her gratitude, affirming, "This kindness was a blessing and truly made the students feel special. It was a wonderful way to highlight how science can positively influence the foods we eat. We extend a heartfelt thank you to AMSA for your generosity."

Image credits: AMSA

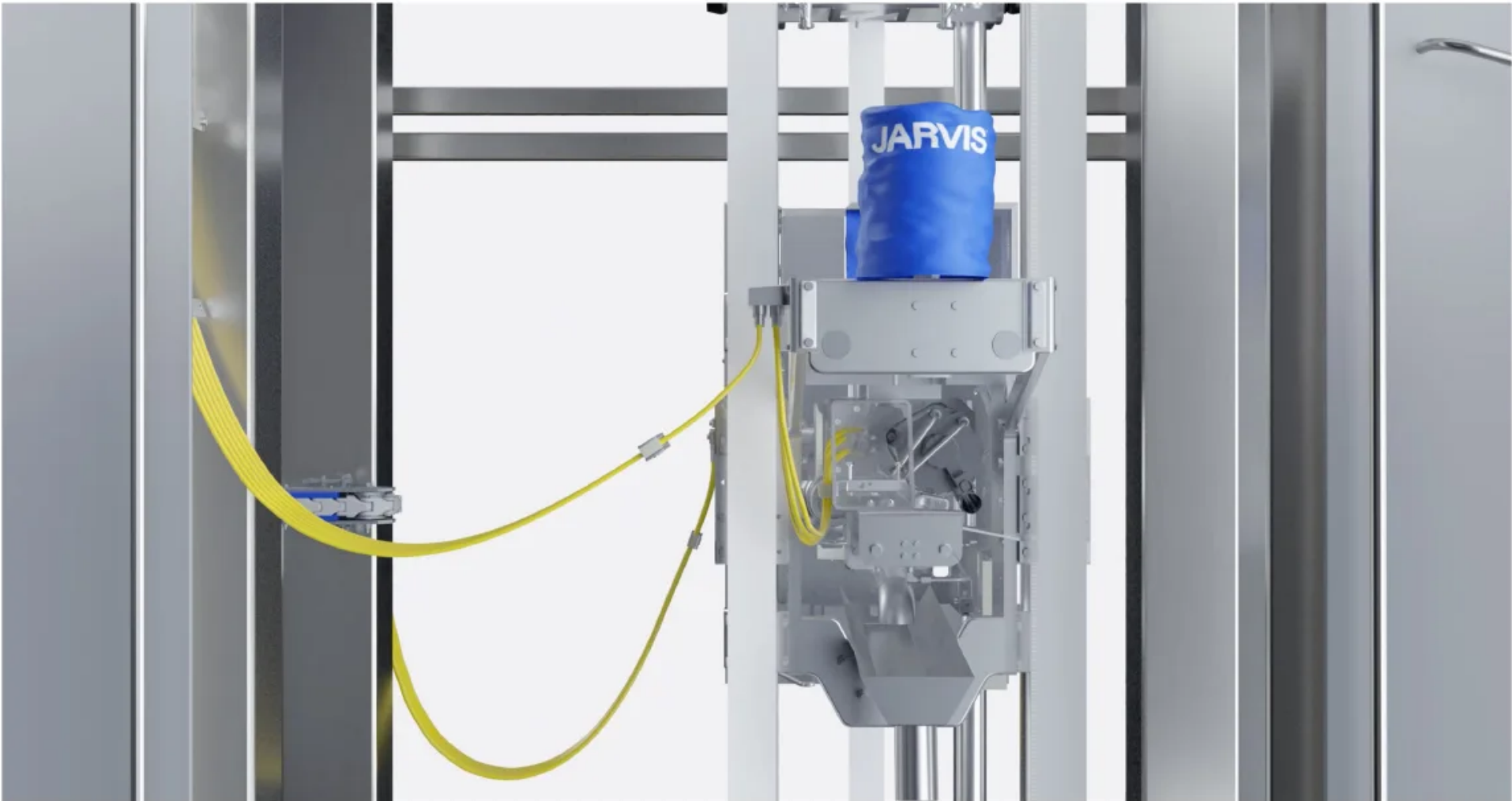


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Wouldn't it be nice if a single machine could solve all your operational challenges?

Though a lot of modern equipment available on the market today can come pretty close, the assumption that a single tool can be a cure-all is an unrealistic one. Automation and robotics have become indispensable in modern manufacturing and warehousing, driving efficiency, productivity, and cost savings. But with so many variables in play, it can be overwhelming to determine where to start.

The easiest way would arguably be to implement a full end-of-line solution with automation components, which would offer the flexibility, scalability, and redundancy needed to improve productivity. Realistically though, budget plays a significant role in line equipment improvements. For manufacturers interested in automation but hesitant due to budget considerations, palletizers can serve as a cost-effective and straightforward introduction. Full system integrations should also be considered as an alternative to single automation investments, as the push to reduce labor continues to be a priority, even on a small scale.



BY SHAWN SEMER

“BY REMOVING THE MANUAL ASPECT OF PALLETIZING, MANUFACTURERS CAN REFOCUS THEIR ATTENTION ON THE ROOT GOAL – CREATING AN EFFICIENT PROCESS THAT PRODUCES THE HIGHEST THROUGHPUT AS QUICKLY AS POSSIBLE.”

Why is this? Let's look at the trends driving adoption of palletizers.

Today's culture of rapid fulfillment has pushed many manufacturers out of their comfort zones. With the number one goal to ship as much as possible as fast as possible, the evolving dynamic of mixed pallet loads has forced manufacturers to think outside the box to keep up with demand. Manual palletizing, predominant in many mid-range operations and distribution centers, carries limitations – it is time-consuming, labor-intensive, and error-prone, leading to inconsistencies and increased risk of load instability and damaged products during transit. Not to mention the liability and risk of injury to the workers doing this repetitive task.

By removing the manual aspect of palletizing, manufacturers can refocus their attention on the root goal – creating an efficient process that produces the highest throughput as quickly as possible. Implementing a core palletizing solution helps address another struggle across many industries: the ongoing labor shortage.

Labor challenges, including higher wages, turnover, and manual inconsistencies, have prompted many manufacturers to look toward automation to fill the resulting gaps in the production line.

Modern manufacturing emphasizes customization and real-time diagnostics to optimize performance. Developing an overall system solution that leverages intrinsic knowledge of other components throughout the entire production line is key to achieving maximum efficiency.

Real-time diagnostics enable continuous monitoring and adjustments, ensuring the palletizer performs at its best and adapts to changing production requirements. This level of customization and adaptability allows for seamless integration into existing systems and processes, further enhancing the overall automation strategy.

To keep up with the growing demand for palletizers, there has been a notable shift toward pre-wired systems to improve installation timeframes and minimize downtime. With advanced software and robust equipment, robotic palletizers have become a versatile solution for operations with multiple SKUs requiring variable stacking patterns. The varying speed capabilities of these machines and customizable intuitive interfaces make them an ideal option for high-volume production lines.

It's important to note that not all palletizing solutions are created equal, and careful consideration is required for optimized performance and longevity. Several factors must be taken into consideration when choosing to upgrade or integrate new equipment.

Selecting the right palletizer involves careful consideration of factors such as Overall Equipment Efficiency (OEE), as well as the ability to handle cases out of specification or damaged pallets. It is essential to evaluate the product history and determine whether a single tool or a combination of tools is needed. Working with an OEM that has a deep bench of engineers with extensive industry experience can help reduce the stress of this often-confusing process. This consultative approach allows for tailored solutions based on modified standards and customized tooling to meet specific requirements.

Adjustability and versatility of the software and tooling are also critical, as varying product types may require different handling methods. While integrated systems can have multiple robots in tandem to form layers and move pallets, it's worth considering that more automated tasks introduce more potential points of failure. This is where the benefit of pre-installation testing comes into play.

By replicating real-world transit conditions in a controlled setting, customers can learn how their specific product can be packaged and shipped more efficiently and cost-effectively. Finding a transit packaging partner who offers this through an ITSA-certified testing lab helps manufacturers verify opportunities for automation before investing in and implementing them across their operations.

Once a palletizer – or any new machine – has been integrated into the production line, it's important to be sure it's regularly maintained and serviced promptly when necessary. An OEM with a team dedicated to post-installation service and support helps keep your equipment operating at peak performance, minimizing downtime and keeping operations running smoothly.

Empowering manufacturers and warehouses to enhance their operations, palletizers have emerged as a strong introductory option to the world of automation. The next generation of manufacturing innovation is upon us, and it's crucial to recognize the increasing role that automation and robotics will play in improving efficiency, productivity, and cost-effectiveness.

While the transition to automation can seem overwhelming, partnering with a transit packaging leader can simplify the process. By focusing on specific pain points and implementing targeted solutions, businesses can reap significant benefits and gain a competitive edge in their respective industries.

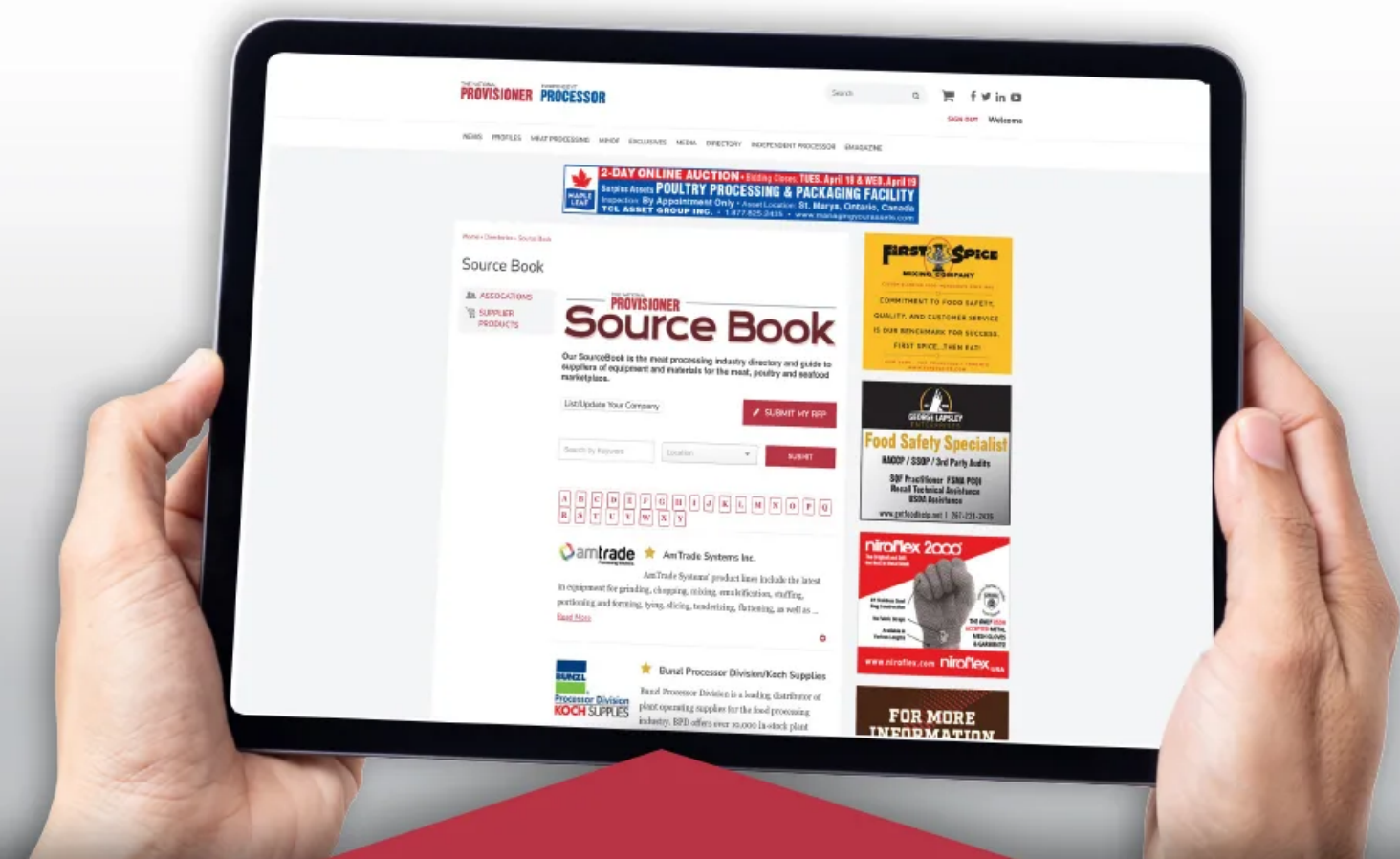
Shawn Semer is the director of sales and marketing for the global automation division at Signode, a manufacturer and distributor of protective packaging systems.

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