

AUGUST 2022

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2022
Deli Report

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Burgers Specialty Foods remains true to its ham-curing roots as it enters new markets.

WINNING FLAVORS AT AAMP'S AMERICAN CURED MEAT CHAMPIONSHIPS

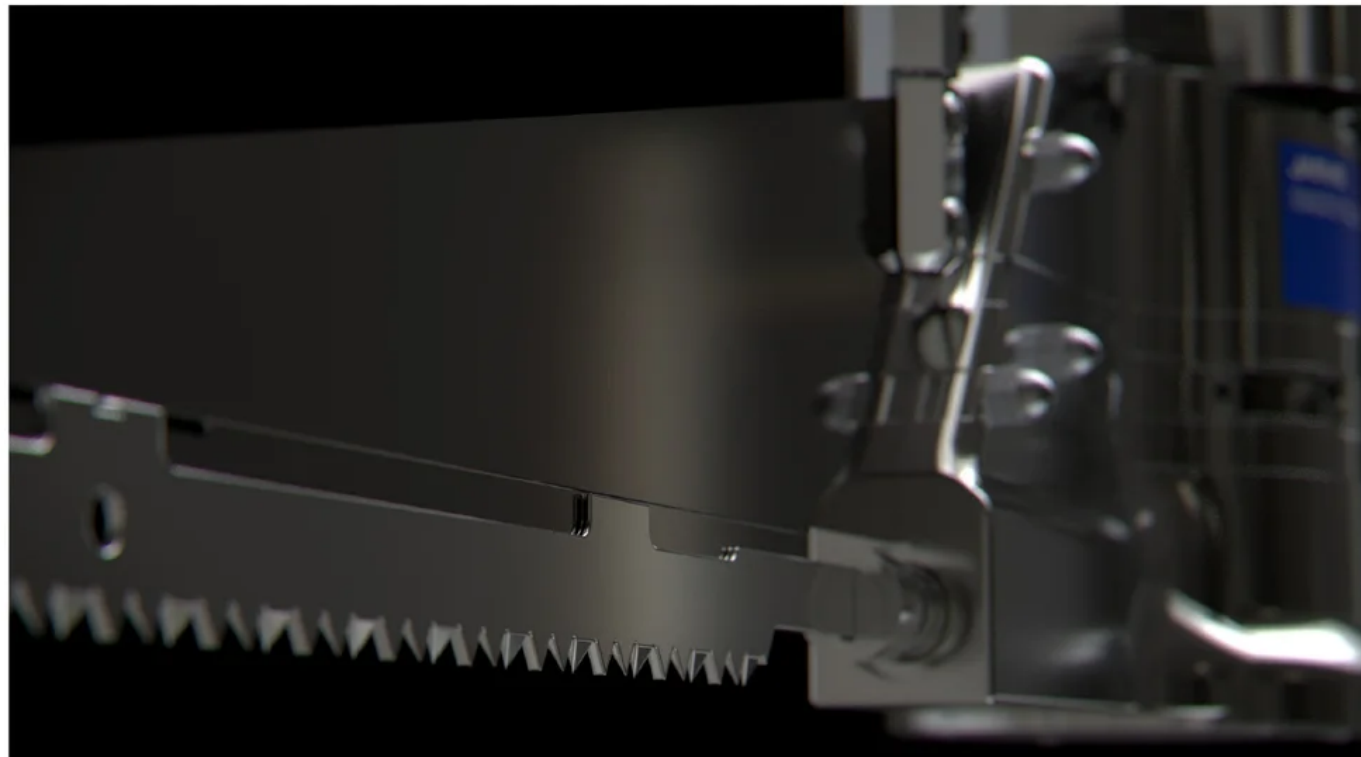
Taking place in conjunction with AAMP's 83rd American Convention of Meat Processors & Suppliers' Exhibition on July 14-16, the 2022 American Cured Meat Championships had participants competing in 29 product classes. Competition coordinator Matt Wenger of Iowa State University shares some thoughts about this year's competition and what makes a winning ACMC entry.



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TOP-VIEWED NEW CONSUMER PRODUCTS:

1. Sonny's BBQ introduces limited-release BBQ Bowls
2. Zaxby's debuts Zenzible Zalads
3. Not winging it: John Soules Foods' AmaZings illustrate product development focus
4. Freddy's debuts Double Bacon BBQ Steakburger featuring Sweet Baby Ray's BBQ sauce
5. Cracker Barrel expands breakfast menu to offer plant-based protein options, premium meat sides



MOST-POPULAR FEATURES:

1. Sausage Report 2022: Still cookin'
2. Lawsuit alleges beef price fixing
3. SPAM brand celebrates 85th birthday
4. John Soules Foods: Thriving in challenging times
5. Awards highlight 2022 AAMP Convention and Exposition



MOST-RECENT PODCAST EPISODES:

1. Episode 143: Rockwell Automation's augmented reality technology
2. Episode 142: Superior Farms' CEO Rick Stott discusses the Sheep Discovery Center
3. Episode 141: CEO Ido Savir of SuperMeat plans a 2023 opening for a U.S. cultured poultry production facility
4. Episode 140: Talking consumer trends with 210 Analytics' Anne-Marie Roerink, Part 2
5. Episode 139: Talking consumer trends with 210 Analytics' Anne-Marie Roerink, Part 1

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MEET OUR 2022 INDEPENDENT PROCESSOR OF THE YEAR

One of the things I've enjoyed most over the years reporting on the food industry is that I sometimes get to know the backstory about some of the food products I've been enjoying my whole life, especially if they have a tie-in to where I grew up, Missouri.

Burger's summer sausage, made in California, Mo., is one of those products for me. Whether snacking at home or on float trips or campouts, Burger's summer sausage was always a family favorite when I was growing up in the Ozarks.

That summer sausage brand I've known my whole life is now sporting a new name, new corporate logo and ambitious growth through regional expansion and product development. Oh, and they also happen to be involved in the smokehouse renovation project at the estate of the father of our country. Read about all that and more and why Burger Specialty Foods is our Independent Processor of the Year.

Also, make sure to check out our 2022 Deli Report and find out why packaged lunchmeat is proving popular with increasingly cost-conscious consumers and how retailers are finding ways to maximize the product's profitability.



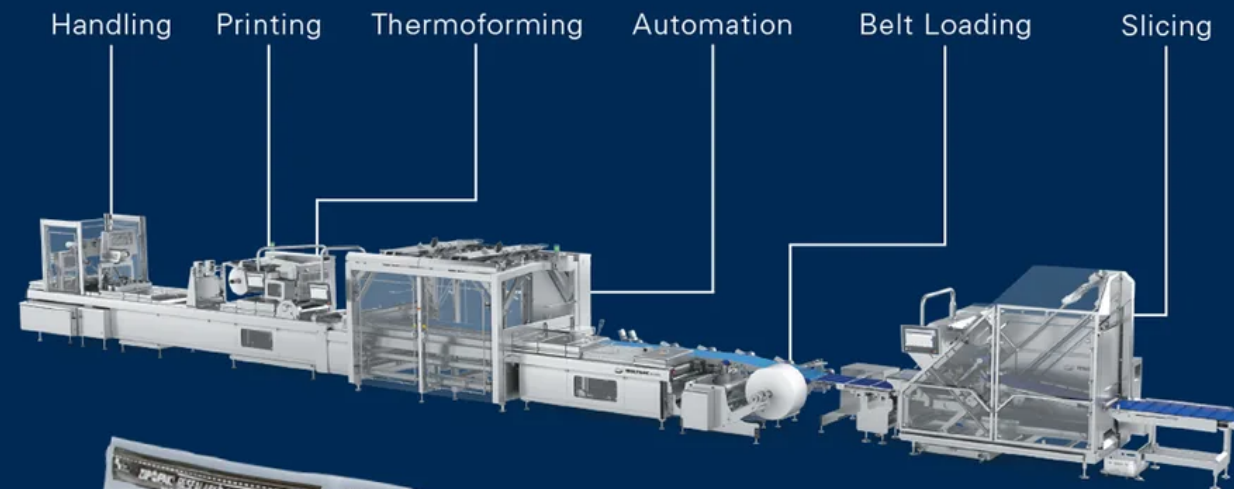
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PACKAGED FOR GROWTH

PACKAGED LUNCHEAT PROVES A STRONG VALUE PROPOSITION FOR CONSUMERS SQUEEZED BY FOOD PRICE INFLATION. BY FRED WILKINSON, MANAGING EDITOR 

Overall packaged lunchmeat is growing dollar sales faster than deli lunchmeat, with packaged lunchmeat appealing to consumers looking for value as grocery prices keep rising. Among low-income households, 61% say they are extremely concerned about food price inflation and 36% somewhat concerned, according to data analytics and market research firm IRI.

"Consumers are still feeling the effect of cooking fatigue, but 80% of meals are still being made at home," said Amanda Evans, consultant for Client Insights at IRI. "Lunchmeat offers consumers solutions for not only fighting cooking fatigue, but an affordable meal solution as many consumers are concerned about inflation."

Underscoring shoppers' prioritization of value-priced options, Evans said private-label brands are outpacing branded offerings in both the deli lunchmeat and packaged lunchmeat categories. For packaged lunchmeat, dollar sales are up 10.7%, while total brands are up 8.6%, Evans said. Deli lunchmeat private label is up 9.3%, and branded products are up 3.3%.

A BIG DRIVER OF PACKAGED LUNCHEAT'S STRONG RETAIL SALES HAS BEEN ALL THE DINING OCCASIONS THAT MOVED TO THE HOME DUE TO THE PANDEMIC — AND IN MANY CASES HAVE REMAINED THERE.

PACKAGED LUNCHEAT

Packaged lunchmeat includes sliced and unsliced lunchmeat that is placed in the refrigerated area of the store often by fresh or processed meat or refrigerated meals/sides.

Packaged lunchmeat has been enjoying strong sales, raking in \$5.7 billion dollars in the past year, said Anne-Marie Roerink, principal at 210 Analytics.

"That's been an incredibly successful area ever since the start of the pandemic," Roerink said.

A big driver of packaged lunchmeat's strong retail sales has been all the dining occasions that moved to the home due to the pandemic — and in many cases have remained there, she said. While many children's lunches that had moved from school cafeterias to the home during the pandemic have gone back to school, many people have never returned to the office post-pandemic.

New uses for lunchmeat also are powering demand, with people expanding the sandwich-making staple's culinary role by using it as a dinner protein or as a snack, Roerink said.

"There's a lot of people who are looking for cost-effective ways to make the end-of-the-month budget meet, and so for a lot of consumers that means that instead of an elaborate meal they may be eating some sandwiches," she said.

Evans agreed, saying, "Pricing is impacting consumers. Buyers are switching away from the service counter to packaged lunchmeat, which offers consumers a better price value."

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DELI LUNCHEAT

Deli lunchmeat includes service counter lunchmeat cut in store by a clerk, grab-and-go packs from the service area but prepackaged in a bunker, and pre-sliced deli/UPC items typically shelved in deli.

Deli lunchmeat has enjoyed sales of \$7.8 billion in the past year, Roerink said, up 5.5%. Pounds sold were similar to year-ago levels.

She said trends driving this growth are consumption occasions moving to the home but also consumers re-creating high-end restaurant deli-style sandwiches at home.

Deli meat in pre-sliced typically 1-pound grab-and-go packs was enjoying strong sales pre-pandemic. Sales have since exploded with triple-digit growth, due in part to service centers being closed during the pandemic coupled with shoppers wanting to get in and out of the store faster, she said.

"Retailers have gotten very smart about having a variety of top-selling cuts in those grab-and-go packages," she said, adding that can include putting different deli meat varieties in the same 1-pound package.

Service counter deli meat sales for the previous 52 weeks in late April 2022 were \$4.8 billion, Roerink said. Many grocery store delis are dealing with labor availability issues, with some having to cut hours or reduce the size of the counter.

Service counter total sales are flat as consumers are opting for grab-and-go options that offer more convenience, Evans said.

"Grab-and-go sales are \$2.3 billion and are up 17.7%, with the biggest growth for absolute dollar sales from turkey, ham and beef," she said. "Pre-sliced deli has \$810 million in sales and is up 6.8%. This segment is the highest priced per pound in the deli, at \$14.85."

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Evans said deli entertaining has been growing too because it makes lunch, snacking and hosting easy with ready-to-go solutions, with party trays proving particularly profitable.

"Meat/cheese and only-meat trays offer so many sizes it gives consumers ready-to-serve options for snacking to large parties," Evans said. "The meat-only trays offer retailers a premium-priced product at \$19.37 per pound, which is priced 67% higher than trays and 102% higher than deli meat. Rather than retailers just offering deli lunchmeat in a bag, offering it on a tray ready to serve can drive premium pricing."



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FAVORITE FLAVORS

"We continue to see the powerhouses of turkey and ham generate the vast majority of sales," Roerink said, "but at the same time we're seeing people have a lot of fun with those powerhouses."

Coatings such as different herbs on the outside or infusions also are influencing deli meat, whether turkey, ham, beef or chicken, she said.

"Turkey is interesting because it is growing across service, grab and go, pre-sliced deli and packaged lunchmeat," Evans said. "Most other types of meat are only growing in one or two areas of lunchmeat. Turkey does a great job of bringing in flavors in the deli and offering consumers a value in the packaged area."

National Turkey Federation said that despite inflation remains a strong market segment for turkey products. As consumers continue cooking at home and cost-conscious shoppers focus on value, turkey deli meat offers flavor profiles that are increasingly popular.

Evans also noted that consumers have an increasing array of turkey deli met flavor options, with the biggest growth coming from peppered, mesquite, hickory, honey, sundried tomato and Cajun.

Evans said a recent hit to the supply chain impacting this deli favorite has been avian influenza, which has massively impacted the number of birds in the supply chain and will be an ongoing issue for the remainder of the year. She said there may start to be slowing growth of chicken and turkey as limited supply pushes manufacturers to prioritize which poultry products to keep in production. Other proteins such as pork and beef might start to see benefits from the limited poultry supply. Even though the impact of avian influenza has started to hit the market with elevated pricing on poultry, consumers' demand for chicken and turkey has not slowed, she said.

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NEW INITIATIVES TO HELP SMALL PROCESSORS COULD AFFECT FOOD SAFETY

USDA EFFORTS TO ADDRESS MARKET CONSOLIDATION AND FOOD SECURITY COULD HOLD FOOD SAFETY IMPLICATIONS.

BY SHAWN K. STEVENS
FOOD INDUSTRY COUNSEL LLC

Consolidation in the meat industry — meaning fewer but ever larger companies — has been an issue of increasing concern for small processors for some time. In an effort to mitigate the ongoing impacts arising from continued large-scale consolidation, the Biden administration and Congress have set out plans to spend approximately \$1 billion toward providing support for small and mid-sized packers.

According to the [White House](#), the meat and poultry sector is a textbook example of an industry that remains dominated by a limited number of companies that control a large percentage of the overall business. Some argue that the lack of broader competition can have an adverse impact on consumers, producers and the overall economy. But, because larger corporations will typically have more resources and scientific knowledge to direct toward the overall safety of their products, questions remain regarding the effect such these initiatives could have on product safety.

Reportedly, approximately 85% of the beef market is now controlled by just four meat packing companies. Likewise, the top four poultry processing firms control 54% of the market, while the top four pork processing firms control nearly three-quarters of the market. These packers, by virtue of their inherent market dominance, are able to exert extraordinary influence at both the consumer and farming ends of the food supply chain.

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The U.S. Department of Agriculture has carefully studied the issue and solicited significant stakeholder input to identify near term solutions. Per USDA's analysis, the following objectives are critical to supporting the industry:

- expanding and diversifying meat and poultry processing capacity
- increasing overall producer income
- providing producers an opportunity to have ownership in processing facilities
- creating stable, well-paying jobs in rural regions
- raising the bar on worker health, safety, training, and wages for meatpacking jobs
- spurring collaboration among producers and workers
- prompting state, tribal, and private co-investment
- providing consumers with more diverse buying choices.

Among its internal initiatives, USDA will reduce the financial burden of overtime and holiday inspection fees for small and very small poultry, meat and egg processing plants by 30% and 75% respectively, which it hopes will help lower-revenue processors compete more effectively. In addition, USDA is also working on a partnership with the Federal Trade Commission on means to enhance the ability of new businesses to remain competitive and to address alleged unfair competitive practices by large producers.

Combined, the new rules are intended to reduce costs to consumer while giving small to mid-size meat processors a better chance of succeeding in an industry dominated by a limited number of large companies. Of course, opponents are quick to point out that when government interjects itself into business, the effects are rarely predictable, and can often stifle, rather than promote, innovation and competition.

Only time will tell what positive and negative effects the new initiatives might will bring. While providing assistance to small and mid-size processors will likely have positive results, such as lower prices for consumers, these initiatives could have unintended consequences by adversely impacting the overall safety of the meat and poultry supply. Indeed, the limited number of large companies controlling the majority of the meat and poultry market have also worked to virtually eradicate the widespread presence of foodborne pathogens in finished products. If the market is drastically altered, allowing for a larger number of less sophisticated companies to process and sell meat and poultry products, the overall safety of the products could be impacted as well.

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ALEISHA JAEGER
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CHRISTINA O'KEEFE
 Director of Sustainability,
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KERRY

Inside Kerry's Expanded Coatings and Breadcrumbs Plant

Kerry's recent \$125 million expansion of its Rome, Georgia, facility gave the company a chance to address soaring market demand for coatings and breadcrumbs, while implementing several engineering and technological innovations to boost productivity, cost savings, sustainability and efficiencies throughout. Aleisha Jaeger and Christina O'Keefe detail the impact engineering has had on this project, which added 30% more production capacity.



PRESENTED BY

BRADY WELU
 Senior Managing Engineer,
 Fresh Meats Engineering,
 Tyson Foods

Tyson

How Tyson Uses Automation to Transform its Case-Ready Meat Operations

Tyson Foods built its new \$300 million, 600,000-square-foot case-ready meats plant in Eagle Mountain, Utah, with an eye firmly on the future. The greenfield project gave Tyson a blank slate for incorporating automation in every area of the facility for maximum efficiency, speed, productivity, labor savings and staff safety. Tyson's Brady Welu explores how automation has transformed today's case-ready operations and the lessons learned along the way.



PRESENTED BY

THERESA MOTTER
 CEO,
 Van's Kitchen

VAN'S KITCHEN

Women in Food Manufacturing

If you've shopped for eggrolls at any supermarket or convenience store, chances are Van's Kitchen was among your choices. The Dallas-based brand produces several million eggrolls each year, and is currently in 10,000+ retail outlets nationwide, with annual revenues of \$45 million. Theresa Motter is Van's CEO (Chief Executive Officer/Chief Eggroll Officer) and is the driving force behind this rapidly growing company. Hear about the company's roots — started by her Vietnamese-immigrant parents in 1986 — and what it takes to stay successful in this competitive industry.

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UKRAINE SITUATION COMPLICATES GLOBAL OUTLOOK FOR KEY CROPS

GLOBAL POLITICS ADD FURTHER COMPLICATIONS TO COST-EFFECTIVELY DELIVERING PRODUCTS TO CUSTOMERS.

BY DAN EMERY
CONTRIBUTING WRITER

Every year in agriculture is unique, and it is influenced by global events. This year the war in Ukraine creates a number of narratives that affect our crop report. Farm input costs have increased dramatically because of the limited availability of certain raw materials that are orphaned in Ukraine and in Russia. The cost of select inputs has dramatically increased, and the value of the finished products like corn, soybeans and wheat driven by cost/demand will increase as well.

Multiple raw materials have been provided to global markets by both the Russians and Ukraine. These materials' availability will be greatly curtailed or redirected for the next 12 to 18 months, causing ripples to the supply of a number of inputs and products.

Ukraine and Russia have become an important source of global supplies of major agricultural commodities in the past 25 years, according to Ohio State University Department of Agricultural, Environmental and Development Economics research published Feb. 28, 2022. These countries, often collectively referred to along with various other Eastern European and Central Asian nations as the Black Sea region, play an important role in the production and export of major grains (corn, wheat and barley) and oilseeds (especially sunflower and sunflower oil). In addition to the direct toll it will take on the people of the region, the Russian invasion of Ukraine in February introduces many economic concerns, including the impact of the conflict on global agricultural markets.

Ukraine is known as one of the world's breadbaskets because of its agricultural production. It accounted for 10% of global wheat exports in 2021, according to the United Nations, while Russia produced about 17% of all wheat exports globally. Russia and Ukraine account for 14% of global wheat production. China and India are major wheat producers but are net importers. Other countries with fairly large wheat export shares include Australia (8.4%), Argentina (6.6%), Kazakhstan (4.1%) and Turkey (3.4%).

Ukraine and Russia are the leading producers and exporters of sunflower oil, which comprises a 9% production share and nearly a 2% export share for the world vegetable oil market. Nearly 60% of world sunflower oil production occurs in Ukraine and Russia, and the two countries account for more than 75% of world exports. An unknown percentage of crops typically grown in Ukraine will not get planted in the planting cycle, or supplies will be disrupted. The crops that are harvested in this region will be difficult to get to a friendly port.

The 2022 U.S. planting schedule was delayed by approximately 10 days, as Minnesota and North Dakota were affected most by extended winter. The spring growing season was hot and dry in the lower Midwest. As usual, there are pockets of drought, but nothing that will have a significant impact on either the corn or soybean supply. U.S. yield is always heavily dependent on rain in July and August, so we'll hope for the best. Indications are that some farmers are using less fertilizer because of the price, causing their yield to decline. Typically, U.S. yield goes up almost every year because of the new hybrids, upwards of 95% of all our crops are from GMO seeds creating higher average yields each year.

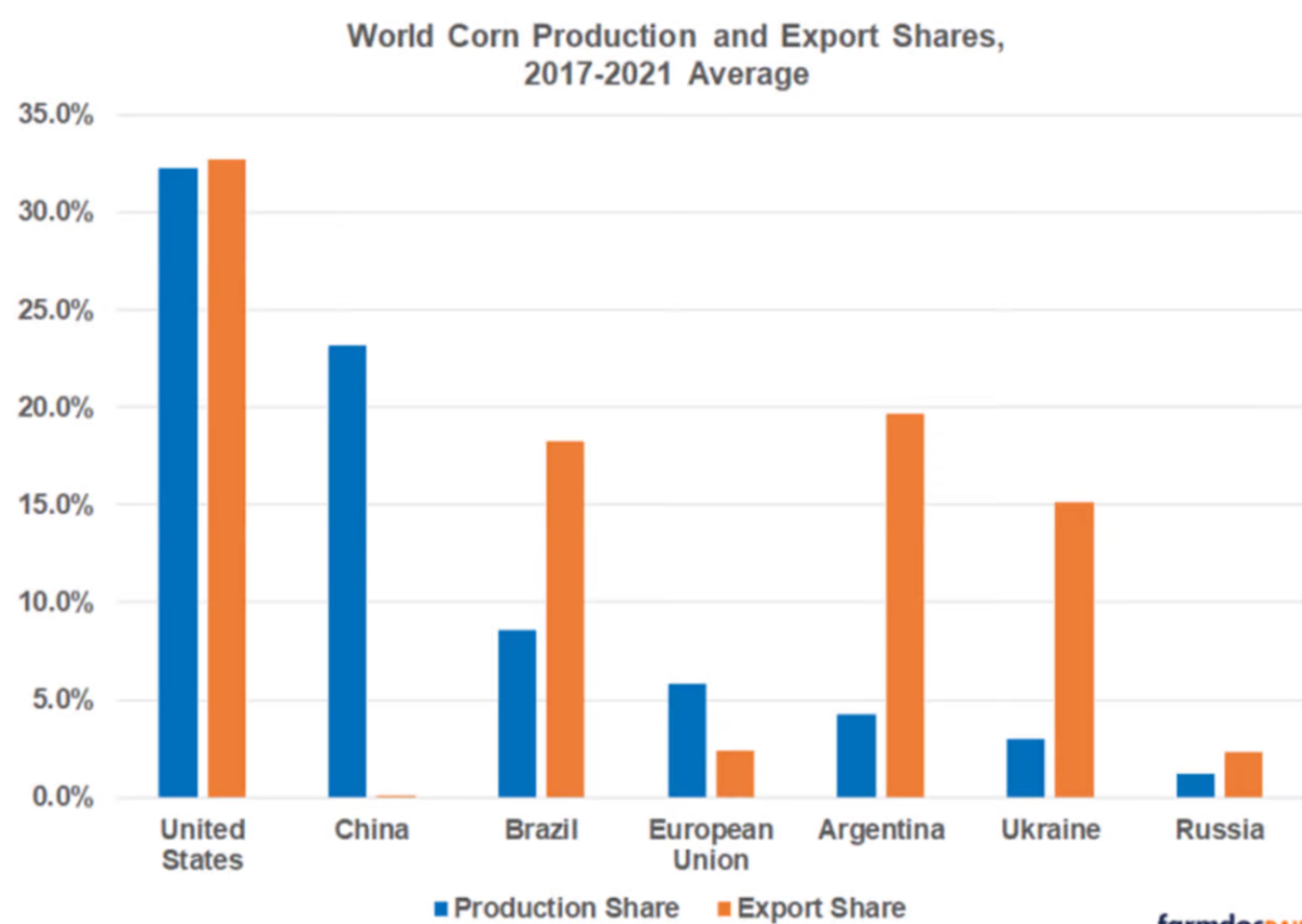


CORN*

In late June, the U.S. Department of Agriculture estimated that corn acres planted will reach 89.921 million acres in 2022, a 3.7% decrease vs. 2021. In 36 out of 48 states, the agency estimates flat or slightly lower acreage compared to 2021. Harvested acres are estimated at 81.940 acres

USDA's corn stock estimates rose 5.7%, to 4.346 billion bushels vs. last June's total. USDA noted a divergent trend regarding on and off-farm storage for corn stocks. On-farm corn stocks are at an estimated 2.225 billion bushels, up 21.6% from a year ago, while off-farm stocks of 2.121 billion bushels moved down 6% this year.

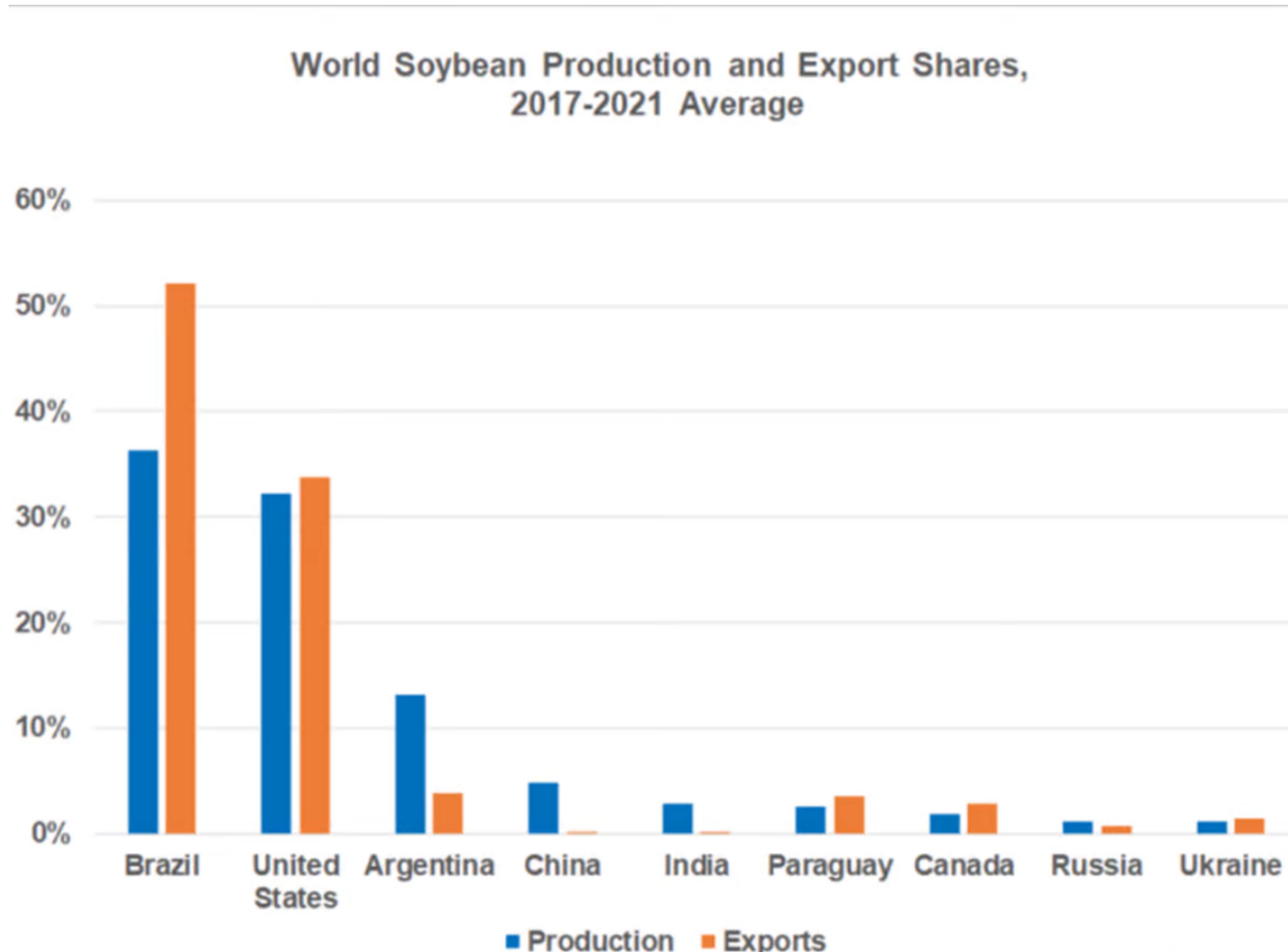
The U.S. remains the dominant global producer (32%) and exporter (33%) of corn. Brazil (18.3%) and Argentina (20%) rank second and third in corn exports. Ukraine now ranks fourth, contributing more than 15% of world corn exports. Russia ranks sixth, with a 2.3% share of corn exports. Notably, Ukraine has been the dominant supplier of corn to China. A shift toward import of more U.S. corn to China began in 2020 after a poor Ukrainian crop.



farmdoc daily (12):27.

SOYBEANS*

The USDA estimated soybean acres trended 1.3% higher from a year ago, with 88.325 million acres. That's moderately lower than USDA's March estimates. Soybeans stored in all positions on June 1, 2022, totaled 972.4 million bushels, up 26.3% from June 1, 2021. On-farm stocks totaled 331 million bushels, up 50.7% from a year ago. Off-farm stocks, at 640 million bushels, are up 16.6% from a year ago.



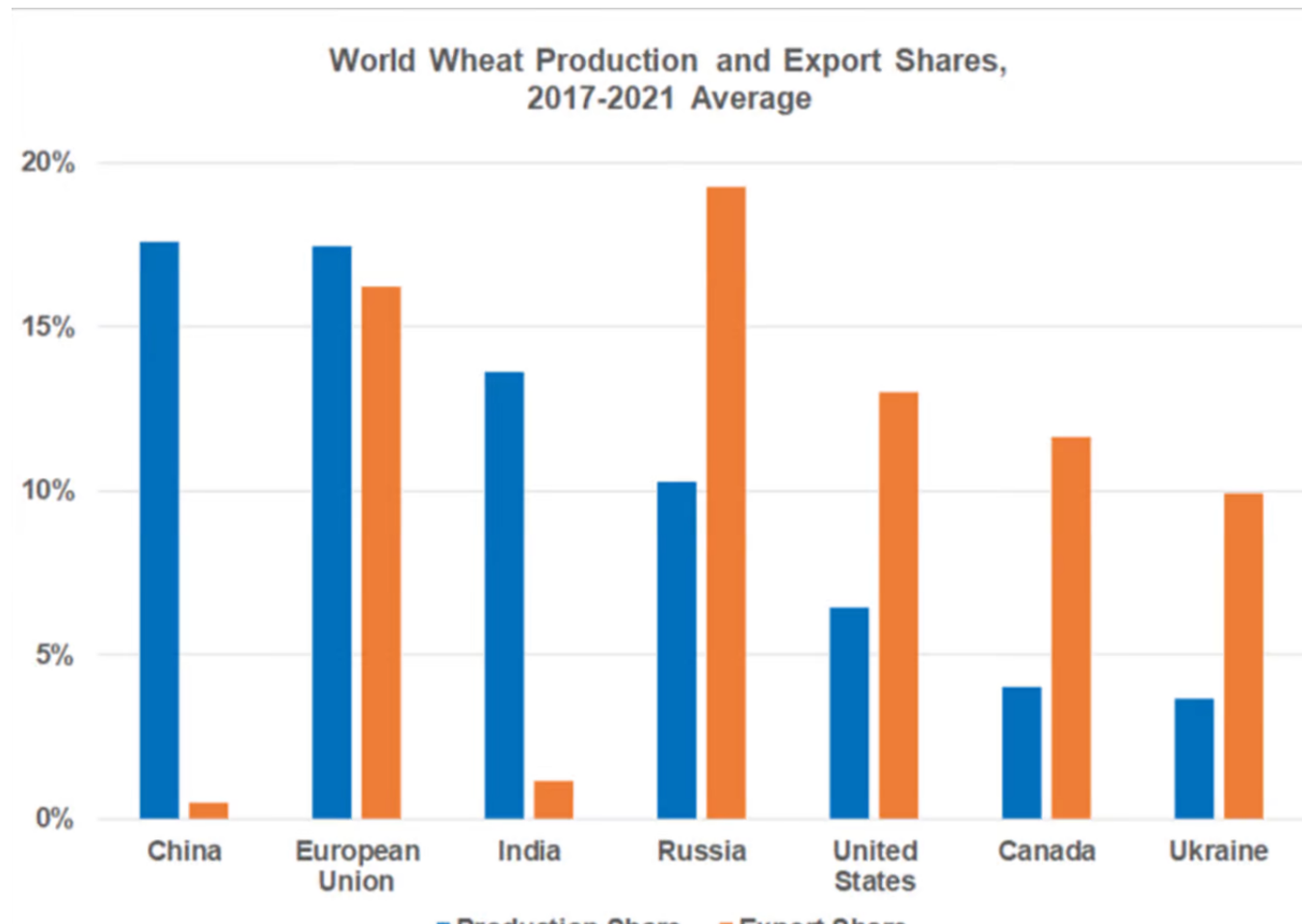
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WHEAT*

All wheat acres for 2022 came in estimated at 47.09 million acres, up 1% from 2021. While acreage is higher, 2022 still marks the fifth-lowest acreage since records began in 1919.

Winter wheat acres are projected at 34 million, up 1% from last year, though still slightly below the pre-report average. Of that total, about 23.5 million acres are hard red winter wheat, while soft red winter accounts for 6.86 million acres and white winter comes in at 3.61 million acres.

Spring wheat acreage was reported at 11.11 million acres, down 3% from 2021, but higher than the pre-report average estimate. Of that total, 10.4 million acres, are hard red spring wheat. Durum wheat acres came in at 1.98 million acres, up 21% from last year.



farmdoc daily (12):27.

Potash is a key ingredient in fertilizer. 2021 potash use for fertilizers was estimated at 45 million tons. Russia/Belarus mines produce 17.11 million metric tons, 38% of the world's potash supply. This disruption could result in a significant reduction in fertilizer use globally, resulting in a reduction in yield. The long-term result may be famine and starvation in certain parts of the world.

SUMMARY

Feed ingredient prices and transportation costs will remain highly volatile as the global situation continues to evolve. Because of superior farming technology and productivity of its farmers, the U.S. is projected to have a reasonably good harvest this year. Yield may be affected by drought and the reduction in the use of fertilizer by farmers looking to contain costs. Global politics will continue to influence cost structure and the ability to deliver products cost-effectively to customers. By limiting the supply of animals produced, farmers should be able to make a profit in spite of all the external influences. Consumers in other parts of the world will be food insecure.

*Data from USDA's report on 6/30/22

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THE FUTURE IS IN GOOD HANDS:

AMSA 75TH RMC STUDENT ACTIVITIES

MORE THAN 300 STUDENTS FROM ACROSS THE COUNTRY SHOW OFF THEIR COOKING SKILLS AND KNOWLEDGE OF PROCESSED MEAT.

BY KIELEE WHITEWOOD

With more than 900 attendees, 81 speakers, 39 sessions and a few days of successful networking, we are delighted to announce that the American Meat Science Association's (AMSA) 75th Reciprocal Meat Conference (RMC) was a tremendous success. A special thank you goes to our co-hosts for the 75th RMC – Iowa State University, Kemin Food Technologies, the National Pork Board and Hormel Foods Corp. – for their tremendous support and planning. RMC was well attended by more than 300 energetic and engaged students from all over the country. These students had a fantastic time showing off their cooking skills, their knowledge of processed meat, how fast they can buzz in during quiz bowl and how many kills and homeruns they could hit. We had a wonderful few days in Des Moines, Iowa, and are excited to highlight the events in which students were able to participate!

On Saturday, June 11, we kicked off the AMSA RMC at the Des Moines Area Community College where more than 90 students made their visions a reality at the Iron Chef Contest, sponsored by Cargill. At the Iowa Culinary Institute, they were provided Top Blade steaks and were instructed on how to best fabricate them for the competition. In addition, they were instructed to include a starch, vegetable and sauce with their meat to create the perfect plate. Students were given a gift card to a local grocery store, Hy-Vee, and were able to shop for exactly what they wanted. They were creative with a variety of seasonings and spent the afternoon learning about food preparation and proper plating techniques. Each group was given the opportunity to search through the Iowa Culinary Institute to find the perfect and unique plate for their meal. While walking through the kitchen of the Iowa Culinary Institute, you couldn't miss the camaraderie of the students along with their openness to learn from one another. It was amazing to watch students from all over the country mingle and work in teams to create the perfect plate.

After the plates were completed, they were judged by professional chefs and AMSA members. The judges were delighted to see the artwork created by students and taste the wonderful mixtures of foods and flavors they produced. Ultimately, the judges scored each plate and tallied the points to announce the winner. The judges expressed how impressed they were during the judging of the plates and stated that every plate was uniquely crafted with a specific strategy.



We all know how popular charcuterie boards have become and we could not help but bring that popularity to the 2022 RMC. In addition to the plate, teams were prompted to create a charcuterie board that was judged by the AMSA Board of Directors. While shopping, students strolled the aisles trying to find the perfect nuts, jams and whatever they could find to go along with the meats and cheese they were provided. Judges were impressed by the creativity and the unique features of each board. One group even made a bird out of a pineapple! When each group was finished the boards were laid out to be judged. The students of AMSA are incredibly talented! Every charcuterie board created by the students could have all passed for one that was professionally made. A special thank you goes out to all of the sponsors that provided product support for this event including Cargill, CTI Foods, Maple Leaf, A.C. Legg, Iowa Culinary Institute, UltraSource, Hy-Vee and Farm Credit Services of America.

The Seventh Annual Processed Meat Contest, sponsored by JBS Foods/Pilgrim's, also took place on Saturday, June 11, at the Des Moines Area Community College. There were more than 100 contestants that competed individually and placed classes of various processed products, made decisions on whether to keep or cull products based on industry standards, and identified defects across a variety of processed meats products. Hormel Foods, Clemens Food Group and UltraSource provided product for this event. The contest consisted of two rotations where there was an undergraduate division and a graduate division. Students had fun competing against their peers. Although this contest is a relatively new addition to the AMSA RMC, students and industry professionals alike have stated the value that the contest holds for students in their future careers. The ability to identify defects, analyze products for quality, and general knowledge about the processed side of the meat industry will surely prove beneficial for students as they take their place in the field of meat science.



If you were not at Quiz Bowl, sponsored by JBS Foods/Pilgrim's, on Sunday, June 12, you really missed out! Students spent the day answering questions in an intense, competitive and engaging manner. This year, it was extremely competitive with a total of 29 undergraduate teams and 116 students. Students answered questions about the meat industry, meat judging and so much more in hopes of winning the 2022 RMC Quiz Bowl Champion title! All day Sunday we were at the Iowa Events Center holding quiz bowl rounds in different rooms throughout Memorial Hall. The preliminary rounds finally finished and came down to the last two teams standing and headed over to Reimann Gardens in Ames, Iowa, to have the final match. After technical difficulties, waiting, problem solving and wondering if the Quiz Bowl finals would even happen, we kicked off the finals between University of Florida and Texas Tech University. The two teams went head-to-head for a few hours while everyone was on the edge of their seats with each question asked. Texas Tech won the first round, but since it was a double elimination tournament, another round commenced. Everyone was watching eagerly to see who would take the 2022 RMC Quiz Bowl Champion title, and Florida won by just five points. The room was filled with hugs, support, and great sportsmanship as everyone congratulated both teams. The Reimann Gardens was a unique venue that held an amazing group of students!



We decided to bring the sand volleyball tournament back this year and it was tons of fun! Just a few hours before the Quiz Bowl finals, students kicked-off the reception with a sand volleyball, sponsored by Kemin and softball tournament, sponsored by American Foods Group. They gathered at Iowa State University's intramural fields and had a blast playing against their peers. Though it was hot and sandy, multiple laughs echoed through the volleyball courts as all ages were included in diving for the ball and serving aces to the opposing team! On the other side of the court, the softball tournament was a little more competitive as the Meatheads dominated! They all had a blast hitting the ball as far as they could and throwing people out on the bases. It's safe to say the tournaments were a huge hit!



Last but not least, students showed off their research! Digital ePosters student researchers created were available for viewing throughout the week. There were 168 abstracts submitted that attendees could walk through, read, and ask the students questions. In addition, there were 38 total ePosters entered in the student ePoster research competition that were judged including 11 undergraduate sponsored by JBS Foods/Pilgrim's, 16 master's, sponsored by Tyson Foods Inc. and 11 PhD posters sponsored by Hormel Foods. If you walked through the ePosters, I'm sure you caught on to how bright these students are and how effective their research will be in the future!



The student activities at the 2022 AMSA 75th RMC in Des Moines were a blast! We cannot wait to host all the student members in St. Paul, Minn., again next summer, June 25-28, 2023, and see the competitiveness, comradeship, and successful networking come back to life!

Kielee Whitewood is an intern at the American Meat Science Association and a student at Texas Tech University.



2022 STATE OF THE INDUSTRY REPORT

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IS DISRUPTION-PROOF MANUFACTURING POSSIBLE WITH RECENT SUPPLY CHAIN TRENDS?

Marcus Lindstrom / Royalty-free/E+ Collection

RESPONDING TO CHANGES IN THE SUPPLY CHAIN REQUIRES A FUNDAMENTAL SHIFT IN COMPANIES' APPROACH TO PRODUCTION.

According to Oden's 2021 State of Manufacturing report, the supply chain is top-of-mind for most manufacturing executives. One of the primary reasons for this are the major disruptions supply chains have undergone recently, with a significant impact on manufacturing operations.



BY ERIC WHITLEY

CHANGING SUPPLY CHAIN AND TRENDING CHARACTERISTICS

Digitization of the supply chain has enabled monitoring operations beyond the shop floor. It has empowered purchasing managers and warehouse managers to buy, ship and store inventory exactly on time and stay lean to reduce overall cost.

Additionally, the impact of the Covid-19 pandemic has made manufacturers rethink the concept of offshoring. It has forced them to become more resilient and transparent, and their supply chain to adopt some noteworthy characteristics:

- lean manufacturing approach
- robust decision processes
- agile and circular growth
- responsive to demands
- preparedness for the future.

These characteristics are driving major disruptions across the supply chain that would be difficult to respond to with manual processes. At this juncture, a centralized database that coordinates the supply chain with other departments can give actionable insights. For instance, platforms such as Enterprise Asset Management (EAM) software help purchasing and shop managers to place orders based on data-driven insights and keep disruption on the shop floor at bay. However, responding to these changes in the supply chain requires fundamental shifts in the manufacturing approach.

MANY MANUFACTURERS HAVE MADE REGIONAL CHANGES TO NORMALIZE THE EFFECTS OF THESE DISRUPTIONS. ALMOST 45% ARE BRINGING THEIR MANUFACTURING UNITS BACK TO THE US.

MAJOR CHANGES THAT NEW SUPPLY CHAIN TRENDS WILL ENFORCE

1. Reactive changes to respond to an adjusting supply chain

In Oden's report, about 67% of manufacturers responded that they faced challenges to certify new suppliers, and approximately 57% said they could not bring new suppliers onboard easily. While manufacturers deal with this situation, on the other end of the spectrum, there is fluctuating demand.

Many manufacturers have made regional changes to normalize the effects of these disruptions. Almost 45% are bringing their manufacturing units back to the US. This will allow the manufacturers to keep production houses closer and minimize the risks in the supply chain.

As per McKinsey, this could also result in lower costs and increased productivity, and trade worth \$4.6 trillion may be rebalanced. We are witnessing the supply chain being driven by non-economic factors and by control over exports, which lowers any major, sudden changes in manufacturing.

2. Investments in micro-factories for future-proofing

By bringing back production to the U.S., manufacturers are adopting reshoring and establishing micro-factories. This requires heavy investments but empowers manufacturers to stay closer to their customers. Manufacturers can deploy appropriate skills to scale up smaller manufacturing operations to run at full capacity.

Such a practice is also called flexible manufacturing. It offers high value but low volume. As the approach is complex and expensive, it demands a significant budget allocation well in advance. Back in October of 2020, the British EV developer Arrival announced its first micro-factory in the U.S. with an investment of \$46 million.

3. Mobilization and planning

With a fast-evolving supply chain, there are increasing financial and operational challenges too. Manufacturers must navigate these challenges by mitigating the risks of changing consumer buying trends, i.e. buying during the Covid-19 pandemic. One solution is leveraging Industrial Internet of Things (IIoT) and data-driven insights.

Increased data connectivity and real-time visibility can empower leaders to channelize their resources and build robust risk responses in the long run. Also, data collected from various sensors enables manufacturers to predict risks and mitigate them.

Furthermore, collating the same data on a central, visual and interactive dashboard, backed by artificial intelligence and machine learning, gives insights into assets on the shop floor. Shop managers are empowered to tailor their processes and machine utilization.

4. Acquire talent and go digital

A digitized supply chain will only meet its full potential when the rest of the manufacturing functions are digitized. Design engineers and sales teams have leveraged digitization and automation using CPQ (Configure, Price, and Quote) solutions and accelerated time to market.

Likewise, when shop floor managers can use analytics-backed job allocation on machines, inventory management, and purchase and planning through a common digital platform, this brings real-time visibility across the organization to build transparency and responsiveness.

CONCLUSION

A 360-degree analysis of the current changes in the supply chain appears seemingly promising for establishing disruption-proof manufacturing. But at the same time, it is interesting to note that it requires several changes in standard manufacturing approaches and the supporting ecosystem.

Identifying and eliminating disruptions will not only change the approach to manufacturing methods but also increase overall efficiencies. Alongside digitization and advanced analytics, several other technologies boost overall efficiencies. Cloud for the supply chain is an excellent platform to enable accessing your central enterprise database from anywhere, on any device, at any time. Also, it is cost-effective.

As supply chains evolve to become agile and omni-channel, manufacturers are now able to leverage digitization to an extended platform. It will drive informed decision-making and ensure disruption-free manufacturing.

For more than 30 years, Eric Whitley has been a leader in the manufacturing space. In addition to the many publications and articles Eric has written on various manufacturing topics, you may know him from his efforts leading the Total Productive Maintenance effort at Autoliv ASP or from his involvement in the Manufacturing Certification programs at The Ohio State University, where he served as an adjunct faculty member. He currently serves as the director of smart manufacturing for L2L.



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THE 2022 INDEPENDENT PROCESSOR OF THE YEAR:

BURGER
Specialty Foods.

WITH A NEW NAME TO REFLECT ITS GROWTH AS A FOOD MARKETER, THE COMPANY REMAINS TRUE TO ITS HAM-CURING ROOTS AS IT EXPANDS INTO NEW PRODUCTS AND MARKET REGIONS.

BY FRED WILKINSON
MANAGING EDITOR

Capping its recent sales growth, market-expanding acquisitions and implementation of product-enhancing processing and food safety protocols, Burgers' Smokehouse has implemented another particularly high-profile change — this time, to the company's name.

"We recently changed our corporate name to Burger Specialty Foods so we can better communicate who we are internally and externally," CEO Steven Burger said. "We are a fourth-generation family business. We have fourth-generation family members who are currently working in the company."

Steven Burger's grandfather, E.M. Burger, learned the craft of curing meat from his mother, Hulda. Using the family recipe she brought over from Germany in late 1800s, he rubbed country hams in a dry-cure mixture. The pursuit of some extra income back in the 1920s through the 1940s grew into a small business by the early 1950s. In 1952, E.M. Burger built a one-room building on the farm that the main plant sits on for curing country ham. That became the beginning of the modern company. While the product line has diversified, country ham still accounts for about half of Burger Specialty Foods' business.

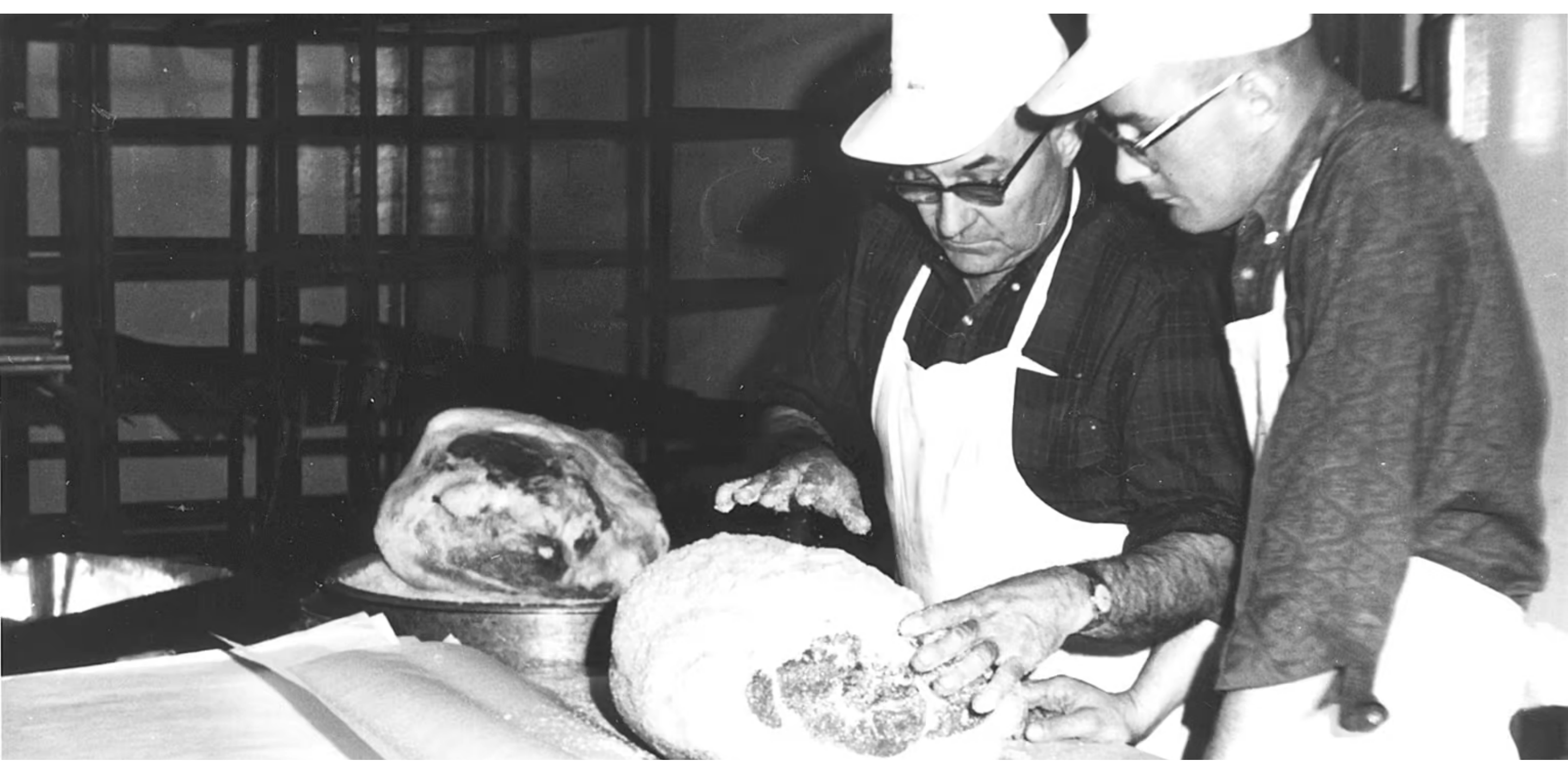
"We are now the largest producer of country ham in the nation," Burger said.



STEVEN BURGER



CARL HERMRECK



Burgers' founder E.M. Burger showing his son, Morris, how to dry rub a country ham.

In addition to its original site in California, Mo., Burger Specialty Foods has also facilities in Springfield, Mo., Burger said, where the company leases an underground facility employing around 30 workers who primarily handle foodservice portion control. Through recent acquisitions, Burger Specialty Foods now has facilities in Tennessee, Kentucky and North Carolina, employing around 450 workers at its various locations.

Eighty-five percent of the Burger Specialty Foods' business is divided between retail and foodservice at about a 50/50 split, Senior Vice President of Sales and Marketing Carl Hermreck said. Direct-to-consumer sales through the company's website and direct-mail catalog orders account for about 15% of the company's business.

Burger Specialty Foods sources meat from strategic suppliers, and true to its roots as a ham-curing operation, its products remain predominantly pork based.

"I would say 80% of the protein that we produce will be pork," Hermreck said.

Cooked products make up close to half of the company's offerings, he said. Burger Specialty Foods' full line of products includes smoked, dry-cured and brine-cured meats and other specialty foods:

- country ham: original and attic aged (aged four to seven months or
- brine-cured and hickory-smoked "city" hams
- dry-cured bacon: five flavors
- dry-cured pork jowl
- barbecue line: pulled pork, beef brisket, pork ribs and more
- summer sausage: logs and snack sticks
- ready to heat Beans N Ham products (three flavors)
- and pizza toppings.



HIGH PRESSURE PROCESSING HAS GAINED A LOT OF FAVOR WITH MEAT PROCESSORS AS A FOOD SAFETY INTERVENTION AND SHELF LIFE EXTENDER.

Building off its strength and success as a meat company, Burger Specialty Foods also offers complementary products — while being mindful of playing to the company's proven strength.

"I think as a manufacturer, you can say we're virtually 100% meat protein," Burger said. "When I say meat, I'm including poultry in that. On the mail-order side, Burger's catalog has a full complement of items, some of which aren't meat protein, but we don't manufacture a lot of those."

Burger Specialty Foods markets some products that aren't meat-centric but still feature meat in them, Hermreck said.

"There are all kinds of different products that we're trying to explore and joining other things together with our beans with meat offerings," he said.

Through processing innovation, Burger Specialty Foods has found new opportunities for leveraging its core strengths when developing products and markets.

"We're always looking for new and innovative products," Hermreck said. "I still think we've got a way to go on exploiting dry-cured bacon, for example. We believe our product is great in every way versus an injected belly or dry-kill process. I think as people eat that and experience that taste, that bite, there's going to be more demand."

FOOD SAFETY AND HPP

High pressure processing has gained a lot of favor with meat processors as a food safety intervention and shelf life extender. Burger Specialty Foods installed its first HPP machine in 2014.

"2015 is when we began using it for wide-scale commercial production," Burger said. "The primary rationale, clearly far and away with HPP, is that it provides an insurance policy against a potential for a crippling recall. That's kind of the umbrella over which all the other benefits reside."

Those other benefits of using HPP include a higher level of quality extending deeper into the product's shelf life. Burger said that because HPP-treated products are microbiologically clean, they don't tend to experience gradual diminishment of quality as the product goes through its shelf life. HPP use also reduces the need for additives that can affect flavor.

"To the extent that you can reduce the use of chemical inhibitors, you get the more natural flavors to come through," Burger said. "We did re-engineer our formulations to reduce the number of chemical inhibitors in the products."

Burger added that some customers want to have that extra layer of protection that chemical inhibitors can provide.

"Whether it's in the back of a restaurant, grocery store or a deli, there's the potential for recontamination at those points," he said. "If you've got that little chemical kicker on the backside there, you can get a little protection after the package is opened."



Burger Specialty Foods installed its first HPP machine in 2014 and credits the process for improving product safety, quality and shelf life.

NEW REGIONS, NEW MARKETS

For the past few years, Burger Specialty Foods has turned to targeted acquisitions as part of its business expansion plans. That growth has taken the company into new geographic markets.

"Each of these acquired brands has regional profiles that appeal to us," Hermreck said. "We want to continue to explore those opportunities and market those brands regionally."

The first of Burger Specialty Foods' recent acquisitions took place in February 2019 when the company acquired Clifty Farms Country Meats, based in Paris, Tenn., and also with a branch in Scottsville, Ky.

"It was a family-owned business like Burger, which focused a lot on the same product lines like country ham, and they had some other country-style cured meat," Hermreck said. "That was a very nice fit"

That acquisition was followed by the purchase of another country ham business, Hobe's Country Ham, in North Wilkesboro, N.C., in January 2020, Hermreck said.

"It fit what we were trying to do as we were growing our country ham business," he said. "We wanted into those regions too. We were missing a few retailers that featured country ham, and it just added to our portfolio, both retail and foodservice."

The most recent acquisition is the Edwards Virginia Smokehouse brand in September 2021.

"I call it an ultra-premium brand offering: old-fashioned techniques, great-tasting food, aged to perfection and handcrafted," Hermreck said. "They're still country ham-based but have a smoked ham offering as well. Salted and dry-cured bacon as well."

MOUNT VERNON SMOKEHOUSE RENOVATION

When Burger Specialty Foods acquired Edwards Virginia Smokehouse, the company found itself becoming involved in a historic renovation of the smokehouse at George Washington's estate, Mount Vernon, in Virginia.

Burger said representatives from Mount Vernon had reached out to Edwards Virginia Smokehouse about involvement in the project. After Burgers acquired Edwards Virginia Smokehouse, they were presented with the possibility of donating to help restore the smokehouse.

The historic smokehouse, which dates to the mid-1770s, is undergoing restoration as part of larger renovation and maintenance efforts at Mount Vernon. The smokehouse project is scheduled for completion in November 2022.

"As I was looking at the smokehouses they were renovating, it was reminiscent of the way my grandfather cured on the farm in the first half of the 20th century," Burger said. "I felt an obligation or at least a draw toward this project because if someone like ourselves won't help preserve the heritage of this type of product, then who will? We stepped forward and donated to allow for the renovation."

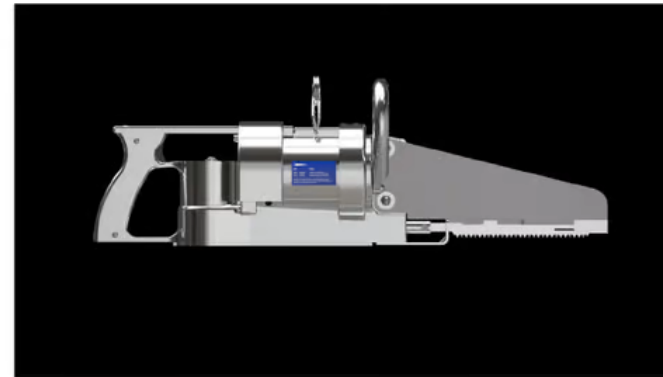
Burger Specialty Foods' involvement in the renovation project has opened up the potential for some innovative marketing tie-ins, including having the company's ham on the menu at Mount Vernon.

"The folks at Mount Vernon have just bent over backward to provide us with a lot of marketing opportunities," Burger said. "We're reaching out to a social media campaign to that end. We're also going to be selling the Edwards Ham in their restaurant and restaurant. We're going to do interesting things — like a country ham and whiskey pairing is coming up. There's a private event that's being planned. There are other co-marketing opportunities that we're hoping to explore."

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IN AN INFLATIONARY GROCERY MARKET, PORK MAKES THE CUT FOR VALUE

FRESH PORK'S PRICE INCREASES IN THE PAST 12 MONTHS HAVE BEEN MORE MODEST THAN THOSE OF MOST VALUE-ADDED PORK PRODUCTS AND OTHER MEAT CATEGORIES.

BY FRED WILKINSON
MANAGING EDITOR

In an inflationary grocery market, fresh pork cuts are a relative value proposition as other meat categories' price increases outpace pork.

Fresh pork sales chalked up modest growth from June 2021 to June 2022, weighing in at \$593 million in June 2022, up 1% from a year ago, according to IRI sales data. That compares to the total fresh meat category's \$6.7 billion in June 2022 sales (up 5.7% from 2021).

The average price per pound in the meat department across all cuts and kinds (fixed and random weight) was \$4.59 in June 2022, up 8.6% from a year ago, according to IRI. Fresh pork prices averaged \$3.23 per pound vs. June 2021, up 10.1% vs. June 2021.

IRI data showed double-digit price inflation rates across much of the pork category. Other popular pork products' price inflation surpassed fresh pork's:

- Dinner sausage prices averaged \$4.46/pound in June, a 16.4% increase over 2021.
- Breakfast sausage price inflation topped that, up 17.6% compared with year-ago pricing at \$4.66 per pound for June 2021.
- Posting even sharper price inflation, bacon prices averaged \$6.77 per pound, up 18.5% compared to a year ago in June.



Of the fifteen meat product categories IRI compared, smoked ham boasted the lowest average price per pound at \$2.63 and experienced a comparatively mild inflation rate, up 7.2% from a year ago.

Producer pork prices were holding firm midway through 2022 on seasonally lower slaughter as well as lower hog carcass weights, according to the National Pork Board's **Profit Maximizer** report compiled by Steiner and Co. Pork trim is mirroring year-ago trends, with the price outlook trending higher through early summer.

Pricing has received some support thanks to seasonal supply decline. NPB sees a strong U.S. pork export outlook for the second half of 2022, with steady/higher prices going forward.

For January through May 2022, exports accounted for 26.3% of total pork production and 23.4% for muscle cuts, down from 31.1% and 27.8%, respectively, in 2021, according to the **U.S. Meat Export Federation**.

NPB pork market research identifies the following market conditions currently influencing the market for pork and pork products:

Back ribs — After hitting record-breaking levels a year ago, back ribs have fallen to their lowest levels in five years. NPB says prices may need to remain low for a while longer before demand from retail and foodservice picks up, but for operators current prices present strong opportunities.

Ham — Prices continue to trade extremely firm. The combination of more boning/trimming at the packing plant, increased processing capacity through secondary trimmers, robust export demand from Mexico and lower slaughter have resulted in tight spot supplies for bone-in product.

Pork belly — NPB market research suggests belly prices are going to trend higher through the summer. However, larger freezer inventories will limit the upside for marketers.

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SOUTHWEST MEAT ASSOCIATION STAFF WILL JOIN ITS MEMBERS TO ADVOCATE FOR THE INDUSTRY ON CAPITOL HILL.

Legal and regulatory issues can be a heavy burden on any small business. Small business owners and managers are already overwhelmed with expenses, finding labor and finding enough hours in the day to get the job done. If you are a meat packer or processor, you know firsthand how impactful updates to regulations can be. In today's ever-changing environment, businesses need to stay current with legal, regulatory and market developments. Therefore, it is beneficial to have an industry association on your side to help navigate the regulatory highway in our industry.

As many of you know, the meat industry is one of the most regulated industries in the market, leaving packers and processors with an overload of regulatory burdens, labor issues and transportation concerns, just to name a few. In today's climate it has never been more important to have your company's voice heard. Having an industry association in your corner is a key component to keeping your business afloat. The Southwest Meat Association (SMA) is a vocal advocate for meat packers and processors. As a small packer or processor, you need a powerful and united voice at the federal level. Let SMA be your voice!



BY LACY BATES
SOUTHWEST MEAT
ASSOCIATION



This September, after a two-year hiatus (thank you COVID), SMA and its members will be back on Capitol Hill. SMA organizes biannual trips to Washington, D.C., allowing members direct access to key lawmakers and regulators on both sides of the aisle. SMA has been fortunate in the past to visit with the White House Office of Public Liaison for Agriculture, Food Safety and Inspection Service officials, House Committee on Agriculture staff, Senate Agriculture Committee staff, House Judiciary Committee staff, and numerous individual congressional offices from both sides of the aisle and both chambers of Congress.

SMA invites its members of all sizes to participate in our advocacy trips. No one delivers the message better than the firms impacted every day. SMA members continue to find tremendous value in these fly-in visits.

SMA Past Chairman Jason Beyer of ABF Packing in Dublin, Texas, said, "I have been participating on these trips for several years. It really makes a difference for our elected officials to hear from us firsthand about the challenges we face. I would strongly encourage all members to consider attending these trips, because I truly believe through continued efforts over time, we can effect positive change for our industry."



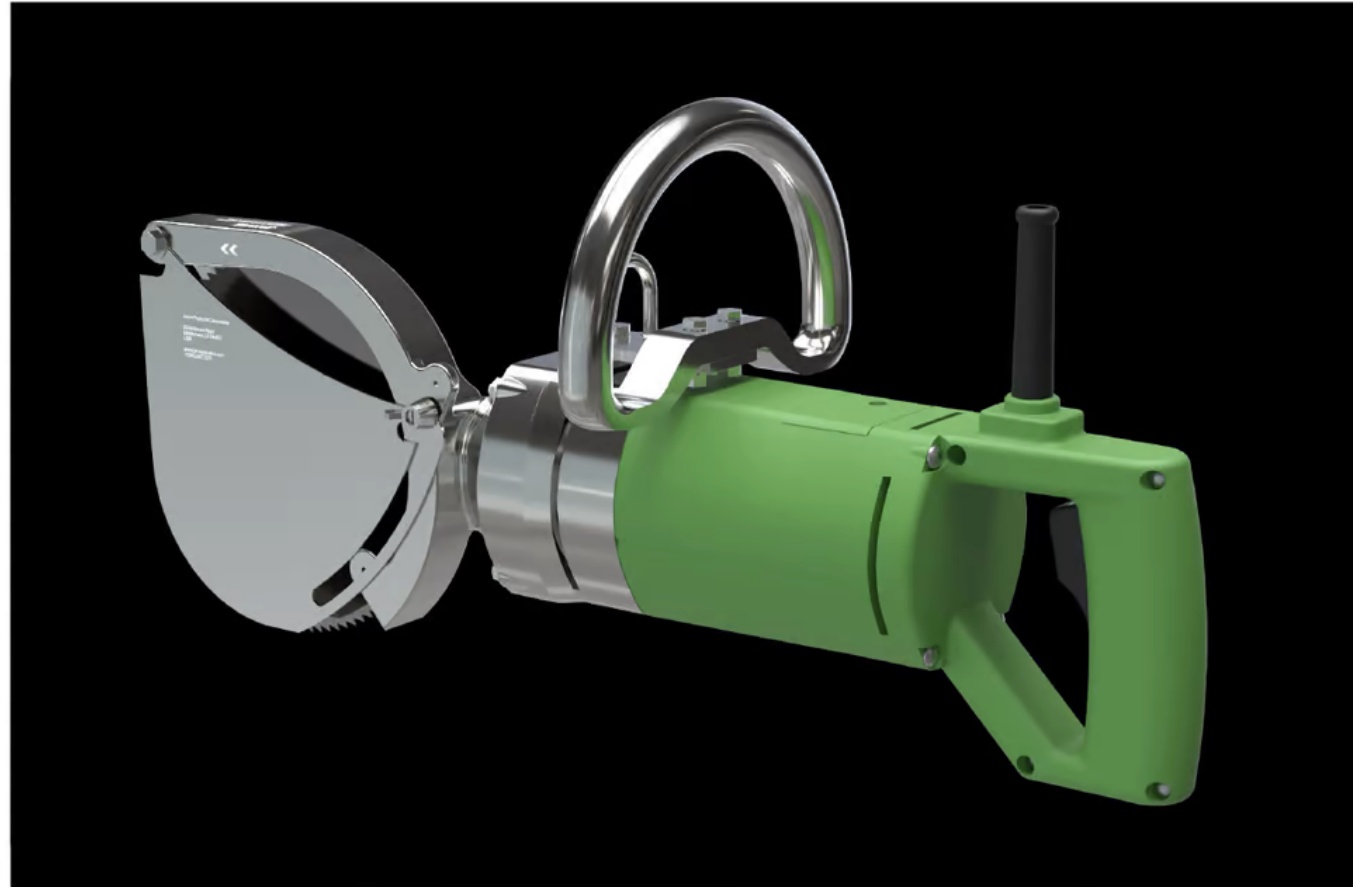
Jonathan Pace, owner of Smokey Denmark Sausage Co. in Austin, Texas, said, "Being a part of the SMA trips to Washington, D.C., has allowed Smokey Denmark and small independent processors to have a voice in what is considered for industry food safety and governmental regulations. A good working relationship between government and industry is vital to the overall health of our food supply chain."

I asked Senior Policy Advisor Philip Karsting of OFW Law how valuable advocacy in Washington, D.C., can be for packers and processors of all sizes. Philip said, "With midterm elections on the horizon (including potential changes in leadership of the House and Senate), SMA's upcoming fly-in is especially important. Offices we regularly visit will benefit from a reintroduction to our industry and its priorities. New staff are likely to have myriad questions reflecting focus on supply chains, inflation, food security and other issues brought to the forefront during the pandemic. It's incredibly valuable for these members and staff to hear firsthand from constituents about 'real world' challenges and concerns. Though our specific conversations may not immediately influence specific legislation of form fodder for official pronouncements, recurring and consistent familiarization with SMA's priorities is likely to influence perspectives in subtle yet important ways."

Therefore, it is vital that our nation's leaders hear directly from establishments that are significantly affected every day by the actions of elected leaders and their counterparts in the agencies regulating our industry. SMA's next advocacy trip will be Sept. 13-15, 2022. SMA encourages you to join us to see firsthand, and to assist in, the efforts being made to ensure Washington hears our message.

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