

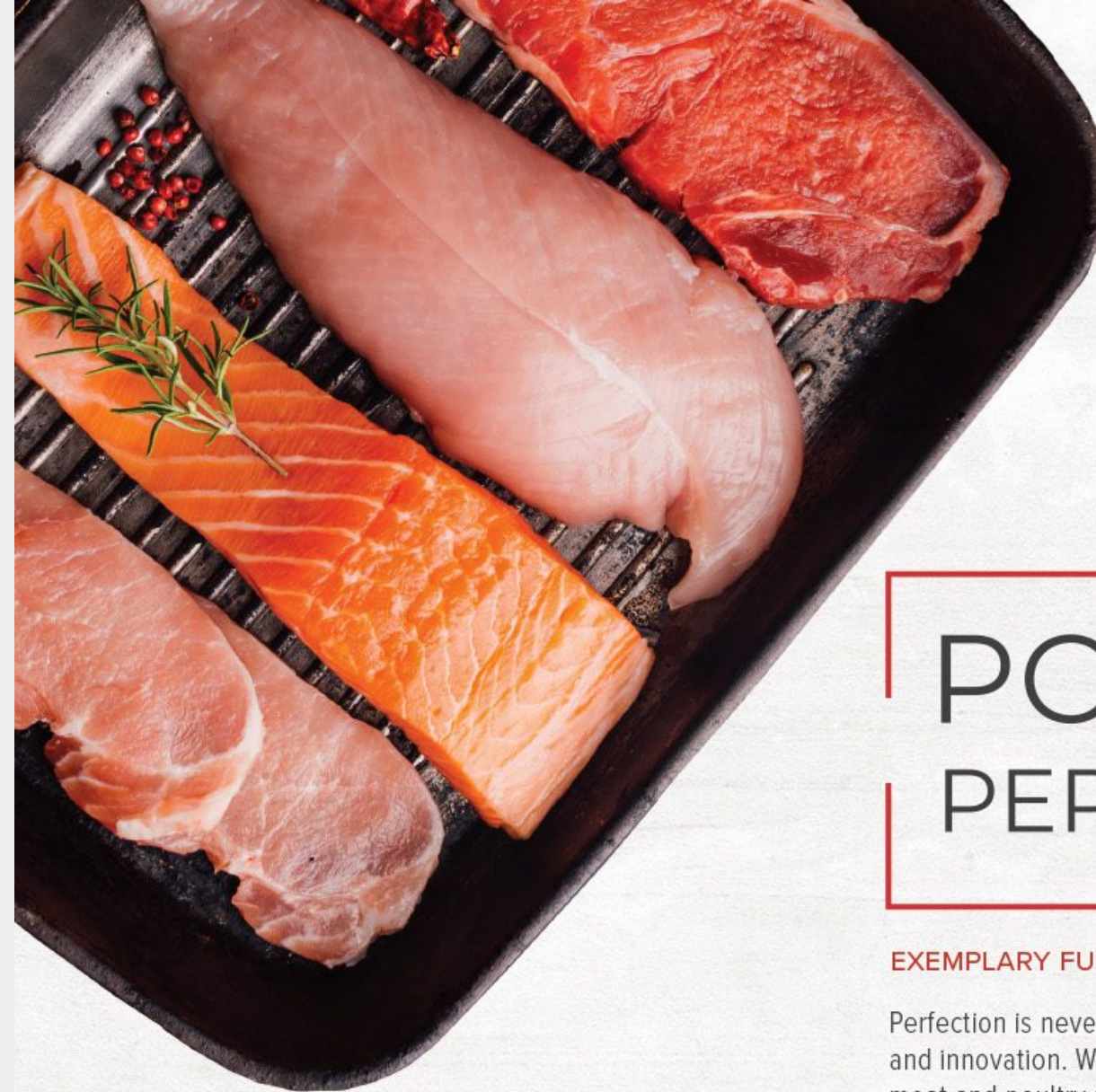


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CONSUMER TRENDS REPORT 2024: BUILDING TRUST

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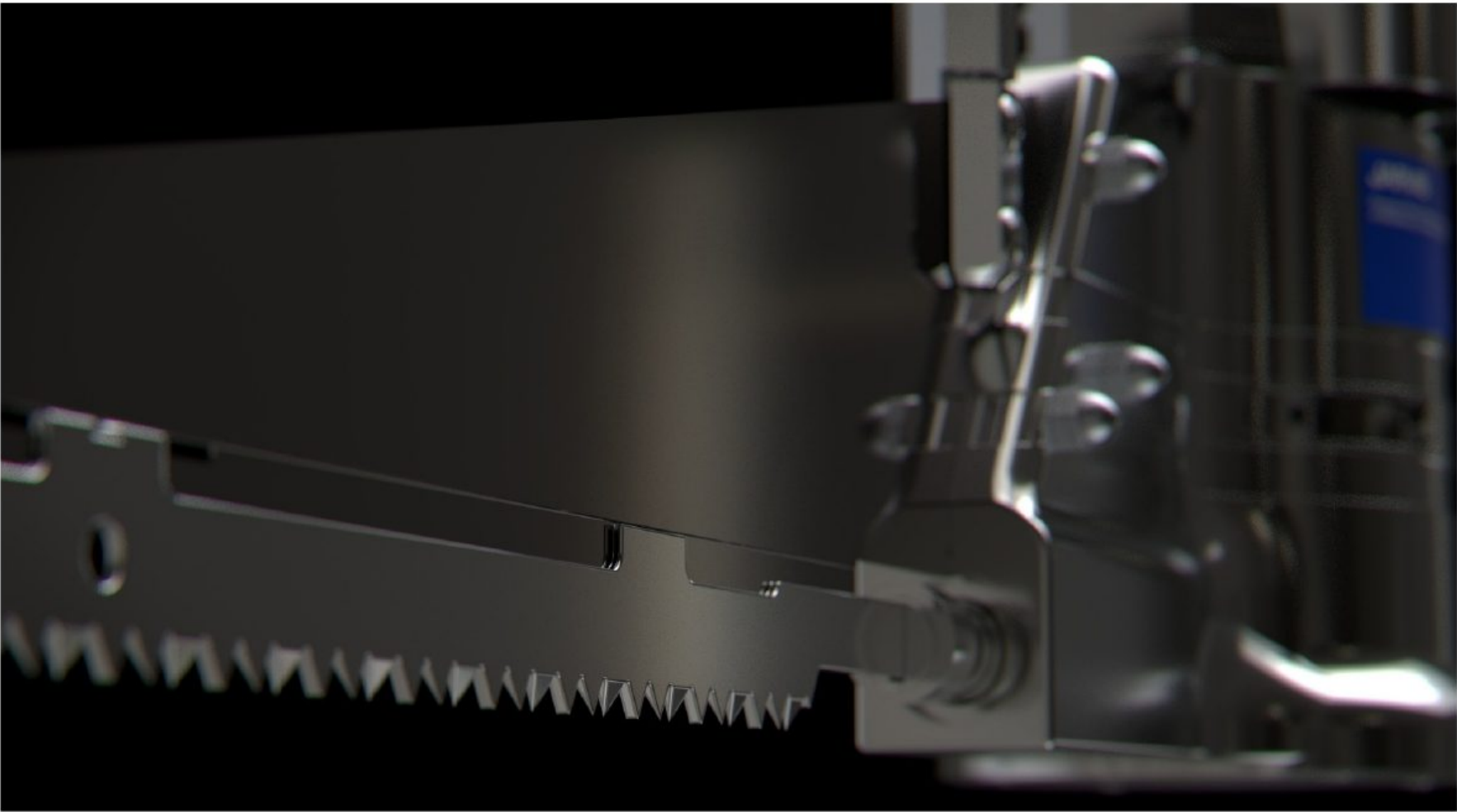
MEATABLE CEO JEFF TRIPICIAN SHARES INSIGHTS ON THE FUTURE FOR CULTIVATED MEAT

In this video, meat industry veteran Jeff Tripician discusses the current status of cultivated meat and details how the innovative proteins could mesh with meat and poultry products.

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TOP-VIEWED NEW CONSUMER PRODUCTS:

- 1. Outback Steakhouse reintroduces Great Barrier Eats menu
- 2. Seemore Meats & Veggies debuts breakfast sausage
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MOST-POPULAR FEATURES:

- 1. Independent Processor of the Year 2024: Cypress Valley Meat Co.
- 2. Meat Industry Hall of Fame inducts Class of 2023
- 3. Law firm files \$10M punitive damages claim against Boar's Head
- 4. Boar's Head shuts down Virginia plant tied to Listeria outbreak
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- 1. Episode 182: James Davidson discusses green packaging materials
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BUILDING CONSUMER TRUST

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Consumers are focused rising food prices, utility expenses and the possibility of economic downturn, according to research from NielsenIQ . Consumers are also open to new value propositions. The NIQ Guide to 2025 Mid-Year Consumer Outlook Report finds private-label products trending toward leading-brand status, with 40% of consumers surveyed saying they would switch to a private-label product they enjoy even if it costs more.

This consumer willingness to re-evaluate long-term brand loyalties could be linked to an overall drop in trust with established institutions. During the 2024 ProteinPACT meeting in Austin, Texas, a workshop presentation detailed how rebuilding trust with consumers can translate into sales gains.

Check out *The National Provisioner's* 2024 Consumer Trends Report for some key takeaways from the presentation.

Also, don't miss our Processor Profile of Oregon pork processor Hill Meat Co., which recently broke ground on an \$18 million expansion effort.



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BUILDING CONSUMER TRUST



RESEARCH SUGGESTS IMPROVING ON LOW LEVELS OF CONSUMER TRUST IN KEY AREAS OF CONCERN CAN IMPROVE SALES.

BY FRED WILKINSON
CHIEF EDITOR

AUSTIN. Texas – During the “Perspectives on Trust in Animal Protein” workshop – part of the educational agenda at the 2024 ProteinPACT meeting Oct. 9-11 in Austin – presenters shared findings from a consumer trends study conducted by the foodservice market research firm Technomic and the Meat Institute.

The study finds that the meat and poultry industry is impacted by low levels of institutional trust. Of particular note, consumers in the 18-24 age cohort are more likely than other demographics to hold skeptical or negative views on the meat and poultry industry in five key focus areas of consumer sentiment:

- health and wellness
- food safety
- environmental impact
- animal welfare
- labor and human rights.



University of Washington researcher Dr. Jennifer Otten and Rich Shank, vice president, research & insights, for Technomic, discuss opportunities for building consumer trust during the 'Perspectives on Trust in Animal Protein' workshop at the 2024 ProteinPACT meeting in Austin, Texas. (Photo by Fred Wilkinson)

In the US, consumers’ institutional trust is at an all-time low, said presenter Rich Shank, vice president, research & insights, for Technomic.

“It’s not just an industry problem we have — there is a macro problem with trust in this country,” Shank said.

“A lot of what we are doing every time we interact with a customer is earning their trust,” he said. “Whether they are buying product from us, whether we are marketing to them – each of those touchpoints is an opportunity to earn and build that trust.”

Food marketers must find ways to connect with consumers within this context, Shank said. Improving measures of trust in the five key focus areas of consumer sentiment has a strong connection to how frequently consumers purchase meat and poultry products.

Across the five categories, 10% to 15% of US consumers have a high level of trust (defined as being active supporters who will speak up for the meat industry and meat products).

Despite a recent dip in trust, the number of consumers in the study who report being active detractors of industry efforts in the five areas has trended down in four of the areas (labor excepted). The study identified news of labor relations issues, foodborne illness outbreaks and recalls as impacting consumer trust. However, the majority of consumers reported they trust the industry to produce safe meat and healthful meat products in an environmentally friendly way.

A particular area for potential improvement in consumer trust in the industry is animal welfare.

Shenk said consumer analysis finds similar levels of strong consumer trust and skepticism across all the focus areas of consumer sentiment except for animal welfare, where 20% of consumers report being active detractors of the meat and poultry industry while only 10% of consumers are active supporters of the industry when it comes to animal welfare.

“This is one of the largest groups of detractors in the industry,” Shank said. “A fifth of the marketplace is sort of in a mindset that is almost an activist. If I’m putting some emphasis on a particular pillar, that 20% is one that we have to work on.”

On a more positive note, Shenk said consumer sentiment toward the industry on environmental issues finds more supporters than detractors.

“There’s actually a fairly small number of active detractors,” he said. ”There’s a lot of noise about environmental activism and things of that nature. They’re actually outnumbered by the folks who support the industry actively and are actually out there talking about it in a positive way.”

The study suggests that consumer trust in the health and wellness attributes of meat and poultry products is higher than for plant-based meat alternatives. The study also found that animal proteins are more likely to be described as craveable and tasty, while plant-based proteins appeal to consumers’ environmental consciousness.

“We really need to start thinking about incentives and communication that sort of recognize these shared and differing priorities, both across producers and consumers, and how we can match those groups up and tailor our approaches to these different groups,” said presenter Dr. Jennifer Otten, an associate professor in the University of Washington's Department of Environmental & Occupational Health Sciences.

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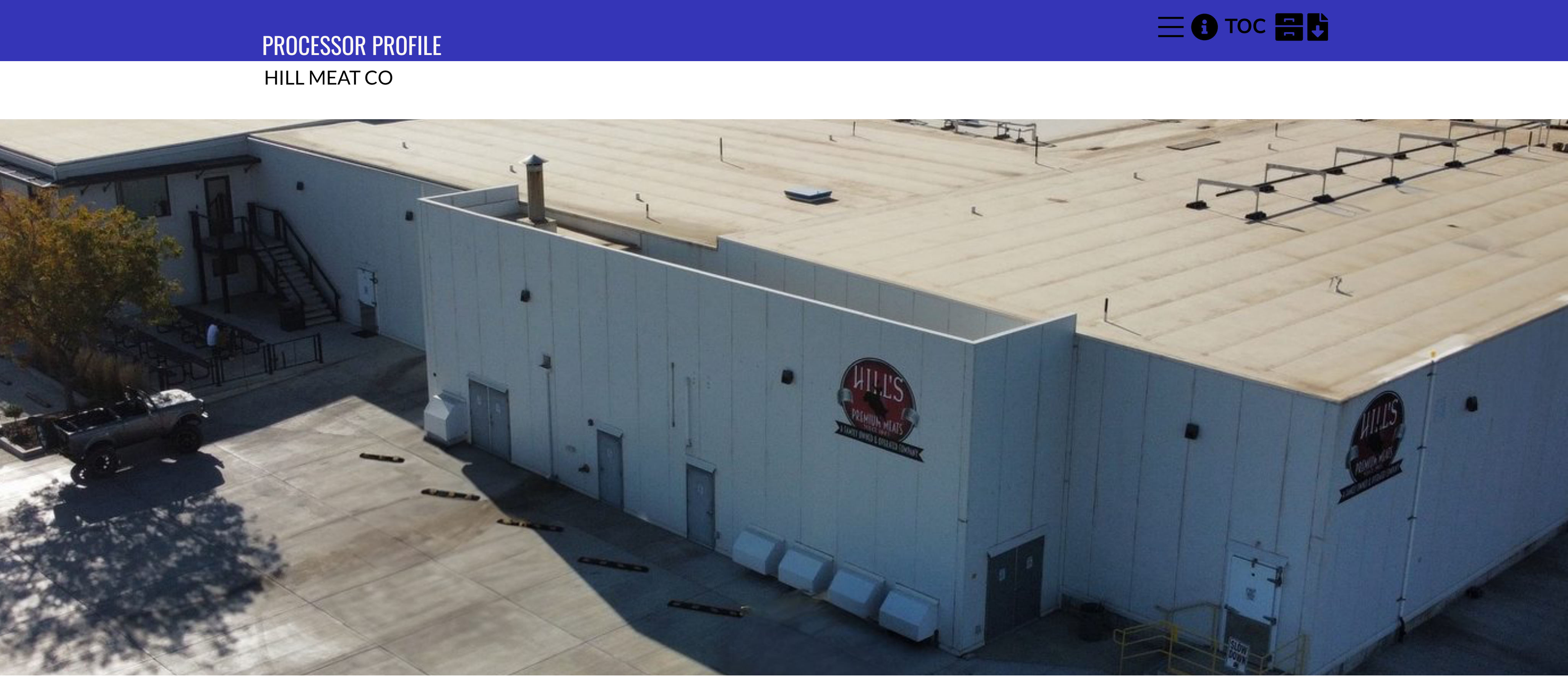
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OREGON PORK PROCESSOR BREAKS GROUND ON \$18M EXPANSION

PENDLETON, ORE.-BASED HILL MEAT CO. IS MOST KNOWN FOR BACON PRODUCTION.

BY SAMMY BREDAR
ASSOCIATE GROUP EDITOR

Pendleton, Ore.-based Hill Meat Co. was founded back in 1947, establishing itself as a community slaughterhouse and meat packer. Though **Hill Meat Co.** has always been family owned and operated, the same family has not always been at the helm.

Back in 1947, the company was started by the Hill family, then sold to the Perkins/Gaboury family, then to the Cheney family, who runs the company today and is passionate about making high-quality **pork** products. To get the inside scoop on Hill Meat Co., its recent expansion and commitment to quality, we consulted with Hill Meat Co. President Nicole Cheney-Sorensen.

Cheney-Sorensen noted that, when her family first started with Hill Meat, her father Jim helped the business narrow its focus, honing expertise in pork production. “Since then, we have completely renovated the entire production facility, more than doubled the size it was when Jim first got here and installed new processing and technology whenever possible,” Cheney-Sorensen said.

With three generations actively involved in day-to-day operations, the Cheney family pays close attention to detail and quality. “I think that because we are such a closely held family company, we have a culture throughout our entire team that we care about our products; how they are made, how they will look on the shelf and how they will taste,” Cheney-Sorensen said.

Hill Meat Co. specifically uses pork derived from hogs raised with Duroc genetics. Over time, the Cheney family has discovered the benefit of Duroc pork.

"When working with producers with Duroc programs, we identified a source with superior muscle mass and conformation which, in our opinion, gets you an end result of a richer tasting pork product," Cheney-Sorensen said.

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Quality has always been of the utmost importance to the Cheney family. Hill Meat Co. supports solely using products that add flavor or enhance food safety..

“We just think that simple is best. Really that goes for anything whether it’s food or anything else,” Cheney-Sorensen said. “Understand what you’re doing, the best, simplest way to accomplish it, and likely that will be the best option.”

Food safety is also vital to Hill Meat Co. The company has invested millions of dollars into their food safety programs and interventions, reflecting how important food safety is to the Hill Meat business.

“We’re dealing with people’s health and lives being in the food business and we are highly aware of our responsibility to bring a safe, wholesome product to market,” Cheney-Sorensen said. “We are proud to have a BRC AA+ certification.”

Bacon is the top seller for Hill Meat Co., equating to about 60% of the company’s total sales. “A consistent best seller is our 3lb. package of thick sliced double smoked bacon. One of our newer offerings with it’s own little cult following is our Seriously Thick Bacon; for the serious carnivores.”

Hill Meat Co. recently broke ground on its \$18 million **expansion effort**, doubling smokehouse capacity. With an additional 30,000 square feet added to the Pendleton facility, the Cheney family is able to enhance operational efficiency while utilizing new, advanced processing equipment.

“It will cost us \$18-20M by the time it’s all said and done and will nearly double our cooking/smoking capacity,” Cheney-Sorensen said. “We’ll really be able maximize efficiency with redirecting product flow, pass-through ovens and new stream system.” The Cheney family anticipates their plant expansion to be completed in September 2025.

Hill Meat Co. is passionate about high-quality pork production. By doubling smokehouse capacity, the company is showing its commitment to increasing product availability for consumers. “We are nothing without our customers,” Cheney-Sorensen said. “We realize that and we do everything we can to make sure they are taken care of. Trust is really important to us and we feel like, hope at least, that our customers have trust in us.”

USING FLAVOR TO STAND OUT

MORE TRADITIONAL FLAVOR PROFILES GAIN FAVOR DUE TO RISING COSTS.

BY FRED WILKINSON
CHIEF EDITOR

Tyler Shepke, R&D manager/certified food scientist/chemist for Excalibur Seasoning, shares some insights on what’s influencing flavor profiles for meat, poultry and seafood products.

What flavors are trending for meat and poultry products?

Let me first start off with saying that it’s not as simple as this flavor or that flavor that is trending, but more a trend back toward a meat-centered diet -- meat that is sustainably sourced and free of chemicals/hormones and other additives. I am also seeing things trending toward more traditional flavor profiles, as there has been a shift in that direction due to the rising costs of foodstuffs -- including meat -- and people are looking for those flavors that remind them of growing up. I think there is a strong correlation between that and the cost of the product. Those flavor profiles that were popular when food was cheaper – we are associating the two together, and I believe that is driving the trend more in that direction, to those more traditional flavorings used in meat, minus the extra additives, chemicals and hormones. Paralleling this trend, the consumer is also looking for a more “farm to table” source for their meat. More information has come to light in the past few years regarding food regimes or diets like the carnivore diet and its positive health benefits, and I think that is also a driving factor. I would say the top key indicators or trends relating to meat are the following:

- sustainability
- health and wellness
- technology integration
- supply chain resilience
- changing consumer behavior
- social media influence

With that being said, there is still a market for new trendy flavors being introduced that usually follows the order of inception (fine dining, mixology, etc.), adoption (trendy restaurants, specialty grocers), proliferation (chain restaurants, mainstream grocery), and ubiquity (find it just about anywhere). I would say outside of the traditional flavor or our past, some macro trends we are seeing are:

- botanical and herbal infusions like basil, mint, rosemary and thyme
- spice blends – more specifically, Middle Eastern spices such as tikka masala and butter chicken, and Asian fusion like gochujang, yuzu, tamarind and lemongrass
- functional ingredients – turmeric and ginger
- umami-rich and savory profiles – miso and tamari
- smoke, charred and grilled flavors – charred pineapple or grilled peach
- spice and heat infusions – bold and spicy flavors infused with hot peppers like harissa and other exotic spice blends.

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WHAT FLAVOR INNOVATIONS FOR BACON ARE ENERGIZING THE CATEGORY?

Bacon is a great example of these flavor trends, both moving to a more traditional profile, as well as incorporating some new ideas. We are seeing a lot of bacon products that are sticking to the maple and hickory smoke. However, we are also seeing bacon being flavored with alternative sugar sources that can impart subtle differences in taste and caramelization when cooked, as well as, incorporating a plethora of unique smoked and charred flavors that are not traditionally seen with bacon.

HOW CAN FLAVORINGS HELP PROCESSORS WITH THEIR CLEAN-LABEL GOALS?

Flavorings are a great way to stand out amongst the crowd, while still highlighting certain clean-label goals. This is currently accomplished with the variety of options available to flavor meat that come from clean sources and have clean ingredient labels, that have also become more affordable to seasoning manufacturers, as opposed to when they were first introduced. The processor carries the reins and can go as far as their imagination wants or keep it more traditional, depending upon who they are selling too and what they are trying to accomplish. There are clean-label options available for just about anything as it currently sits.

HOW DO FLAVORS INTERSECT WITH A PRODUCT’S HEALTH AND WELLNESS ATTRIBUTES?

Flavors can play a vital role in the health/wellness attributes of a food item -- flavors such as turmeric, ginger, oregano and mint. There are endless studies showing the health benefits as it pertains to their antioxidant activity, positive effects on the heart and circulatory system, minerals and vitamins, gut microbiome, and so much more. I believe this trend back to more traditional flavors and flavor sources, simplifying the flavor profiles while enhancing them at the same time due to unique mixtures and blends, is a great direction for our overall health. There is a strong intersection between the two and I foresee that continuing far into the future.

WHAT TRENDS ARE YOU SEEING IN FLAVORS FOR SEAFOOD PRODUCTS?

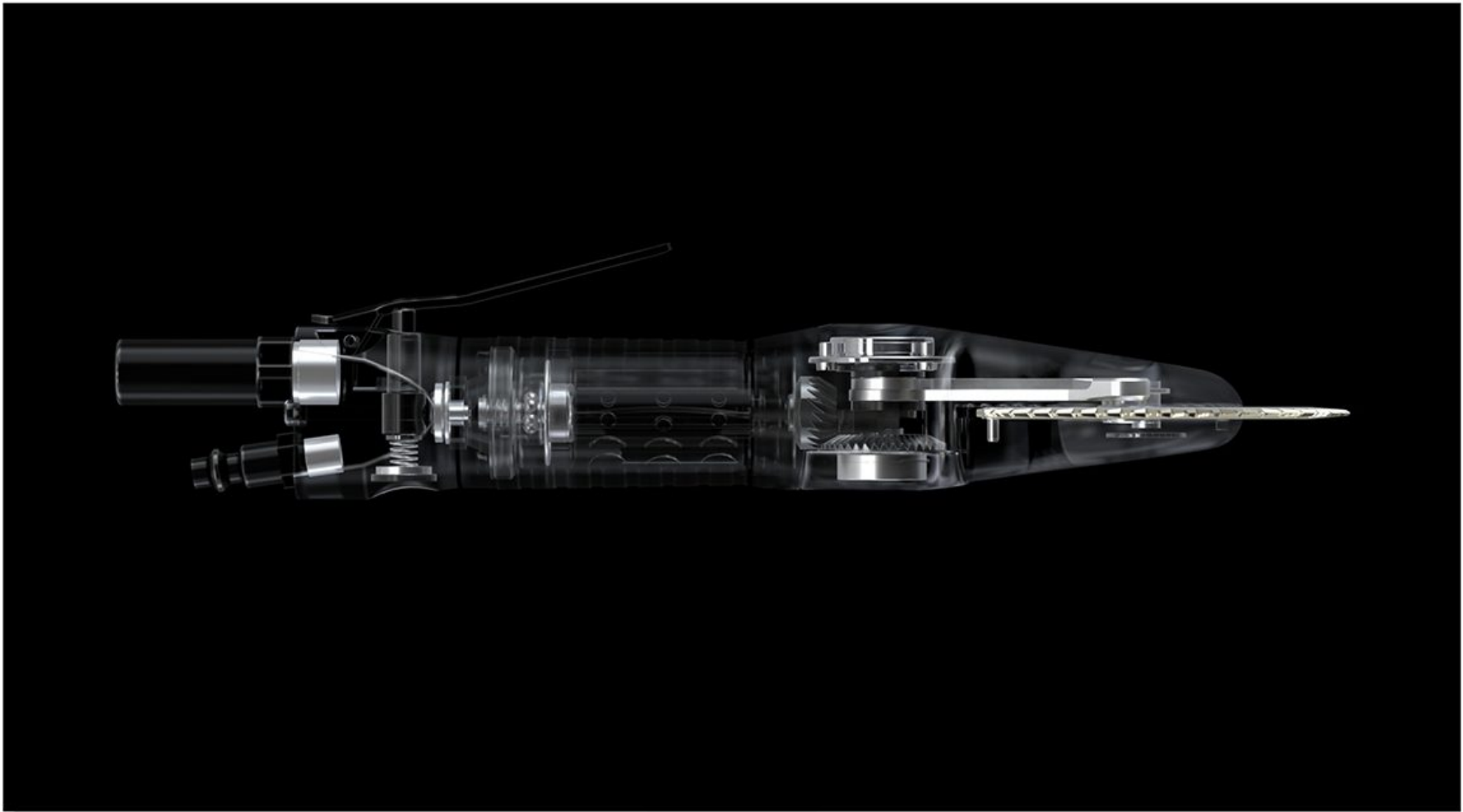
I am seeing a trend towards fruity and umami flavors in seafood products. Flavors such as mango, yuzu, lemongrass, tamari and seaweed. Seafood pairs great with fruity and umami flavors and is a great carrier of such flavors. It is akin to working with a clean slate. I also think that it is following the trend as it pertains to using unique peppers to highlight in a blend that is otherwise a traditional flavoring for seafood. These unique peppers also pair nicely with fruity or umami flavors where you can get a sweet and hot, or sweet and savory flavor experience.

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THE WAR ON PATHOGENS CONTINUES

USDA AND FDA TIGHTEN THE CHAINS ON FOOD COMPANIES
AS THEY CONTINUE TO WAGE THEIR WAR ON PATHOGENS.

BY SHAWN K. STEVENS
FOOD INDUSTRY COUNSEL LLC

In recent years, we have seen a gradual uptick in the robustness of USDA's and FDA's approach to pathogens in the food supply. On the USDA side, the agency has continued its long march against *Salmonella* in raw poultry products, culminating in the more recent rules declaring *Salmonella* to be an adulterant: (1) in raw breaded stuffed chicken products when they exceed a specific threshold (1 colony forming unit (CFU) per gram or higher) for *Salmonella* contamination; and (2) in raw chicken and ground poultry products generally.

The first rule, which has now been finalized by the agency, was recently followed by the second proposed rule, which states that raw chicken carcasses, chicken parts, comminuted chicken and comminuted turkey are adulterated if they contain any type of *Salmonella* at or above 10 colony forming units (CFU) per milliliter (mL) or gram in analytical portion (i.e., milliliter (mL) of rinsate or gram of product), and contain any detectable level of at least one of the *Salmonella* serotypes of public health significance. For raw carcasses, chicken parts and comminuted chicken proposed rule identifies the *Salmonella* serotypes Enteritidis, Typhimurium and I 4,[5],12:i:-. For raw comminuted turkey proposed rule identifies *Salmonella* serotypes Hadar, Typhimurium, and Muenchen.

With its targets focused on *Salmonella*, USDA has also been more actively involved than ever in *Listeria* control. Since the Boar's Head outbreak, which reportedly has led to the deaths of 10 people and sickened dozens of others, developed on the heels of alleged violations in the company's Jarratt, Va., facility. In response, USDA not only focused its resources heavily on the facility in question, but also fanned out across the US, demanding to review microbiological testing data from wide swaths of USDA-regulated food manufacturers. We also see the agency broadening its definitions of Zone One food contact surfaces and, when contamination is found in the environment, requesting that recalls be expanded to include larger amounts of product produced on seemingly unaffected lines.

The same has been true on the FDA side, as well, with the agency continuing its aggressive march against *Listeria* in food facilities. Here too, the agency continues to operate on a three strikes and you're out basis, considering the issuance of Warning Letters to food companies when the agency cultures the same strain of *Listeria* from a processing environment over subsequent inspections. Like USDA, we have also observed FDA require recalls to be broadened to include seemingly unaffected lines or products when *Listeria* is cultured generally in the food processing environment.

So, what does this mean for industry? It means that the federal agencies will continue to tighten the chains on food companies as they continue to wage their war on pathogens. So, in order to avoid becoming the next victim of USDA's or FDA's Fight for Food Safety, now would be the time to invest additional resources into pathogen elimination and control in your food facilities, production lines, and finished products.

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FREEZING DOES NOT NEGATIVELY AFFECT THE EATING EXPERIENCE FOR CONSUMERS

CONSUMER PANELISTS RATE FROZEN SAMPLES AS MORE TENDER THAN THE FRESH SAMPLES BUT FOUND NO OTHER DIFFERENCES FOR JUICINESS OR FLAVOR.

Freezing meat is a common practice to alleviate pressure on cold chain management and to increase the consistency of the aging period. The pandemic pushed the need for freezing due to limited cooler storage for small meat processors. However, freezing was widely thought to not only negatively impact the overall quality of meat, but also to negatively impact the consumer’s perception of quality.

While studies evaluating freezing are prevalent, most have used varied postmortem aging times to facilitate study design. The lack of a comprehensive study evaluating equally aged fresh and frozen steaks prior to this study prevented a true understanding of the impact of freezing to help provide guidance to the industry. Therefore, the objective of this study was to determine the eating quality and consumer perception differences between fresh and frozen beefsteaks of three equal aging periods.

Beef strip loins were selected from a processing plant on two processing dates, one week apart to allow for a one-week freezing period to represent the fresh and frozen treatments. All subprimals were brought back to Kansas State University and were immediately sliced into steaks, and aged for 21 days, 28 days, or 35 days at refrigerated conditions. After aging, the frozen samples were frozen for one week at -4°F in a commercial freezer while the fresh samples finished the designated aging period. On the same day, all samples were aged to the same period of time either with or without a freezing step.

Therefore, on exactly 21 days, 28 days and 35 days of aging fresh and frozen samples were fed to untrained consumers and trained sensory panelists, sheared for shear force and powdered for lab assays. For consumer panels, the first four steaks were given with no additional information, while the last four steaks were served with the labels “previously frozen” or “fresh, never frozen” to determine if the additional information influenced their perception of quality.

The consumer sensory panelists rated the frozen samples as more tender than the fresh samples but found no other differences for juiciness or flavor. Surprisingly, this tenderness difference did not impact the overall liking scores for the consumers. Even when given additional information, the perception of quality was not impacted as the consumers rated the samples similarly regardless of the labeling information.

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Similar to the consumer sensory results, the trained sensory panelists rated the frozen samples higher than the fresh counterparts for overall tenderness, however, the fresh samples scored higher for initial and sustained juiciness. Supporting the sensory data, the frozen steaks had lower shear force values regardless of the aging period indicating the frozen samples were more tender. However, the fresh samples resulted in lower purge and cook loss indicating more water holding capacity.

While some meat quality factors were impacted by freezing, the overall eating quality and perception of quality were not negatively impacted. Similarly, informing consumers of the frozen/fresh state of the product prior to evaluation did not alter their assessment, providing evidence that for consumers, “fresh, never frozen” labeling may not be impactful. Based on this study, the actual eating quality and perception of quality is not impacted by freezing beefsteaks of equal aging periods. Therefore, frozen meat should not be discounted due to the eating quality or perception of the quality of beefsteaks. However, the increase in purge loss due to freezing could result in some economic loss and should be taken into consideration. This study can provide guidance for the industry to make supported decisions on cold chain management strategies.

Beyer, E. S., Decker, L. K., Kidwell, E. G., McGinn, A. L., Chao, M. D., Zumbaugh, M. D., Vipham, J. L. & O'Quinn, T. G., (2024) “Evaluation of Fresh and Frozen Beef Strip Loins of Equal Aging Periods for Palatability Traits”, *Meat and Muscle Biology* 8(1): 16903, 1-13. doi: <https://doi.org/10.22175/mmb.16903>

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BOSTON SWORD & TUNA

KEEPS METAL AT BAY WITH NEW INSPECTION TECHNOLOGY

TRIO OF METTLER-TOLEDO METAL DETECTORS HELP ENSURE SAFE QUALITY PRODUCT.

Boston Sword & Tuna (BST) prides itself on being America’s one-stop-shop for seafood. Founded in the 1970s by the Scola family, whose origins go back to fishing in Sicily, BST has grown to become one of the largest seafood distributors in the country. Their 50,000-squar-foot, state-of-the-art facility handles a wide variety of whole and processed fish and seafood that goes to supermarkets, restaurants, farmers markets and more. To uphold their stringent quality and safety standards, BST installed three metal detectors from Mettler-Toledo Product Inspection to help protect consumers, customers and partners as well as their brand reputation.

“Inspecting seafood is very challenging for most metal detectors,” said Phil Tripoli, maintenance manager at BST. “Saltwater and ice, which are prevalent in our products, put out a magnetic field. You need a very specialized, premium metal detector to be able to reliably find metal contaminants without false rejects given this situation.”

The Profile Advantage excels at identifying and rejecting every type of metal in even the most difficult applications. Compared to traditional single-frequency systems, this advanced inspection technology features multi-simultaneous frequencies to better discern changes due to the presence of metal versus changes within the product itself.

After purchasing one in 2020, BST acquired two more of the inspection units in 2023, Tripoli said. BST now has a Profile Advantage installed on all three of their packaging lines to inspect final product quality. Each system features a large aperture to handle 10-pound corrugated cases of fresh and frozen product including cod, salmon, haddock, crab, swordfish, scallops, shellfish and more.

“Our new inspection systems achieve great detection sensitivity, which is incredibly important considering the prevalence of metal items that can be concealed in seafood. Plus, these systems are consistent. They stay within our required specifications during long production cycles without any adjustments,” noted Tripoli. “We run calibration tests twice a day to confirm each metal detector is maintaining its high accuracy. They always hit the mark.”

If inspection systems at BST detect a potential problem, its conveyor belt automatically stops. “An operator puts the rejected case aside and then re-runs it through one of our other two metal detectors to see if it’s a calibration issue or a genuine reject – fortunately, both of these instances are extremely rare,” Tripoli said.

“We process a wide variety of seafood and, as you can imagine, fresh salmon is going to appear pretty different from frozen crab cakes to a metal detector,” Tripoli said. “We set up recipes for our different products to help us consistently produce the final product quality we need while minimizing false rejects to increase throughput and reduce labor.”

Mettler-Toledo’s metal detectors can store up to 100 different product recipes for fast recall during changeovers, while its “product clustering” capability minimizes the need for setting changes. When running a brand new product, the single-pass auto set-up routine quickly analyzes it, determines the ideal settings and stores the data in the system’s memory.

“Recipe management is super simple on the Profile Advantage,” Tripoli said. “Adding a new product is intuitive – it becomes second nature once you’ve done it a couple of times. When we need to switch over to a different product recipe, it’s just a couple of taps on the control panel and we’re good to go.”

BST’s detection systems are password-protected, enabling the company to limit access to various capabilities as needed, Tripoli said

“This helps ensure that someone doesn’t make an incorrect change to a recipe. It gives us peace of mind to know that only a few people can make deep modifications,” he said. “Despite running almost 24 hours a day, six days a week, our metal detectors have been extremely dependable.”

In terms of cleaning and sanitation, Tripoli said a seafood plant is never going to be straightforward.

“Even though our metal detectors are handling packaged product and not raw, bulk fish, we still take our cleaning process very seriously,” he said. “We spray these systems down with water and sanitizing soap daily and then do a quick hand wash on parts as well. It’s really simple because they’re designed for sanitation and don’t have many nooks and crannies.”

Tripoli concluded, “We pride ourselves on putting out the highest quality product. Our inspection systems give us confidence that we are protecting our customers with the best metal detection technology on the market.”

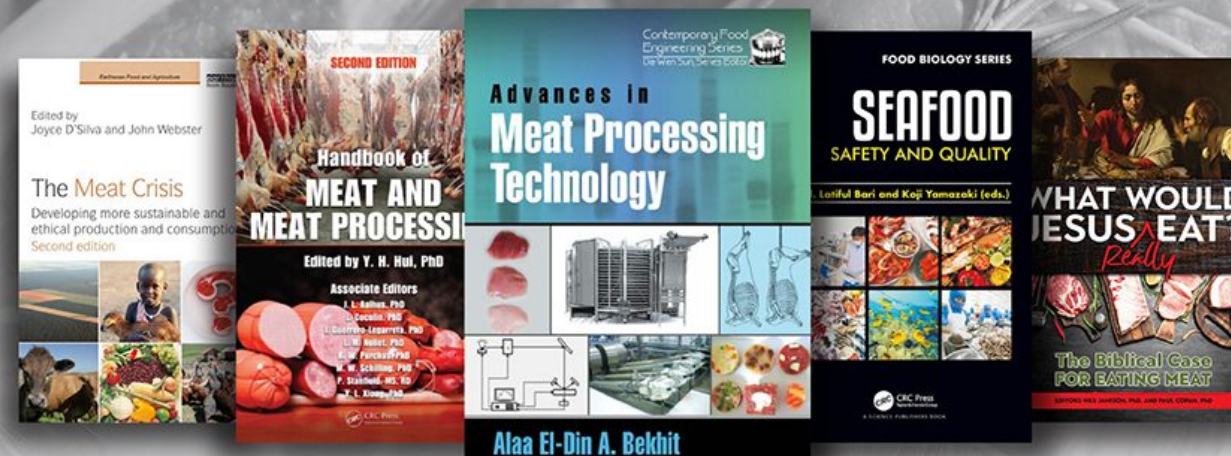
Cat McBride is a writer focused on food processing topics.

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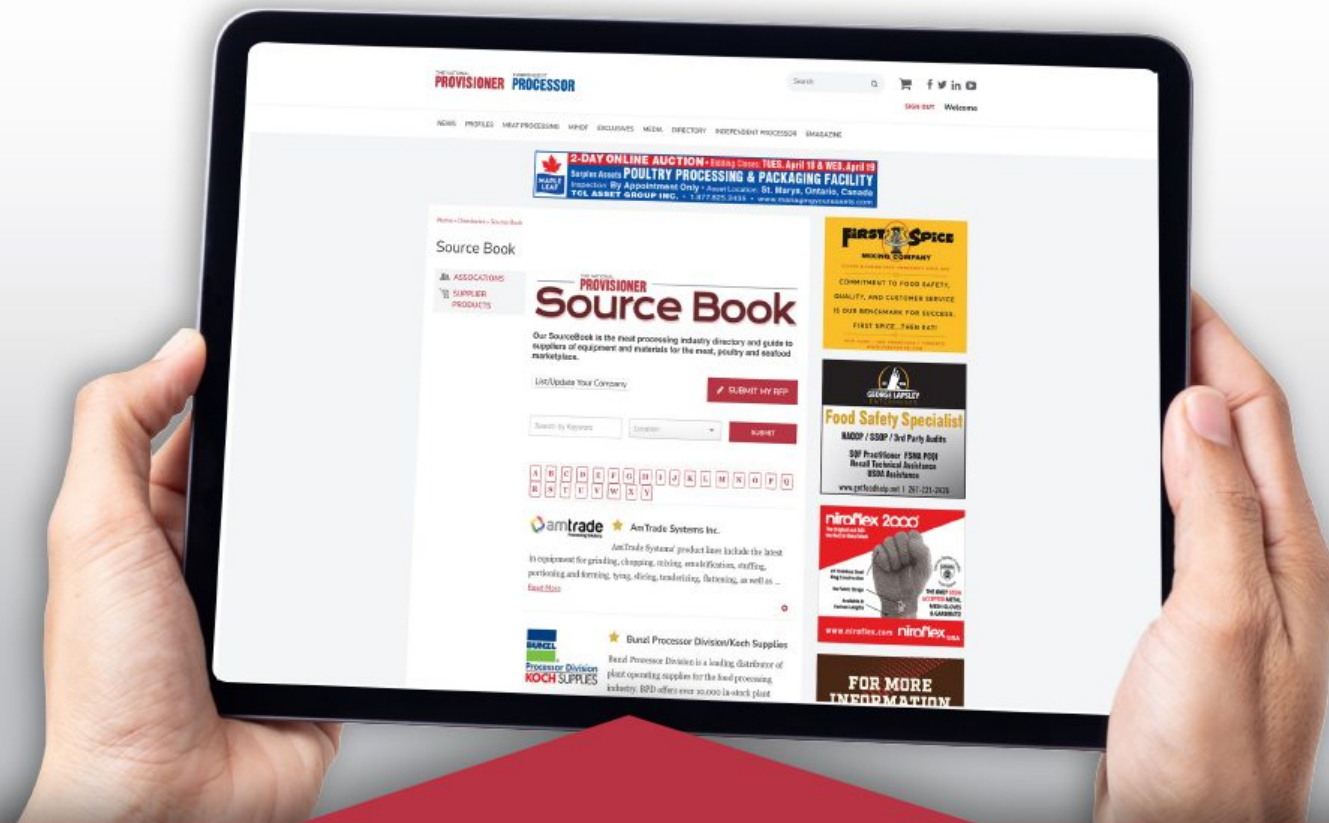


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