

Urner Barry's Reporter

the newsmagazine for the food industry professional
VOLUME 15 | NUMBER 1 | WINTER 2020 | QUARTERLY



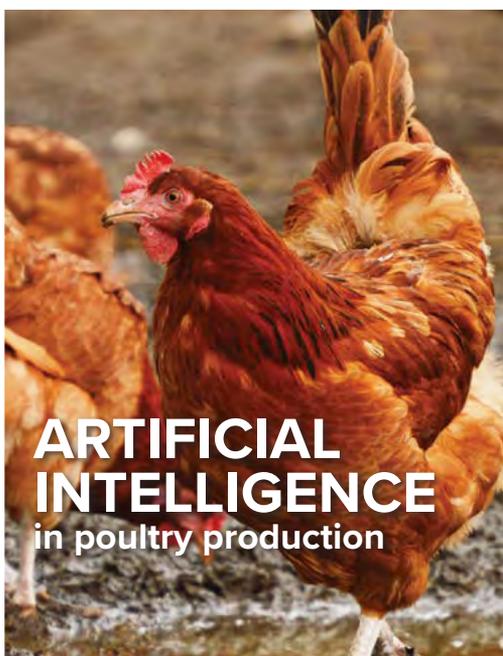
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vision of
**FOOD
TRENDS**



**AFRICAN
SWINE FEVER**
one year update



**SHELLFISH
ITEMS**
swimming upstream



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From the Editor's Desk...

Being a product of the '70s and '80s, my formative years were influenced by reasonably traditional ideas and a hard work ethic. You could be anything you wanted to be if you just set your mind to it and put in the requisite effort.

Societal distractions, electronic or otherwise, were few. A tennis ball, a piece of chalk, some matchbox cars or the local brook provided hours of entertainment. Our first real jobs were something to be proud of, to set us on the road of fiscal responsibility while chiseling and shaping our character. I'm pretty certain none of us expected that an entry level job at the local fast food joint, restaurant or grocery store, would be expected to support our needs as we grew into adults with real-life obligations.

Today, expectations have been forced to change with culturally accepted norms. Priorities have been re-aligned. The internet has made the world a very small place peppered with a sense of immediate gratification. The "can do, will do" work ethic isn't as apparent, nor is loyalty. I hear it said that opportunities to earn a fair wage for a fair day's work have slipped away. Or is it just complacency that has crept into the mindset of some Americans? A sense of entitlement disguised as wage injustice?

Not for the leaders and decision makers of the U.S. food industry and, at its roots, certainly not for the American farmer. They answer to a selfless standard where entitlement is akin to failure. I'd argue that there is no business with more sense of responsibility and pride than commerce involving food production. Not one with more of a social cause or a need to produce more efficiently out of the same inputs, or one which employs the brightest minds in the world to make the great even greater. There is no other that has to move forward against special interest groups who put their own agenda ahead of the uninformed, unquestioning, "if it's on the internet it must be true," global populace. None, who are as challenged by the lack of available funding to combat the lies which have been told a thousand times in order to tell the truth just once.

No, not the food industry or the American farmer. Traditional and uniquely American traits like perseverance and innovation, or lending a competitor a hand, still run deep in the family that is U.S. food production. And yes, the traditional ideas and work ethic I remember from my childhood still exist in its very fiber—sometimes you just need to know where to look.

Stay in touch,



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Urner Barry's Reporter

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AGRI BRIEFING

From toys to trays...

Sustainability: The deciding factor for consumers



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The ways in which foodservice is delivering on brand promises to consumers are widening as sustainability is becoming increasingly important. While Nielsen expects shoppers to spend up to \$150 billion on sustainable products by 2021, sustainability is starting to drive gains in categories from resource management to product packaging. On a global scale, 81% of consumers feel that it is “extremely” or “very” important that companies implement programs to improve the environment. Meanwhile, 70% of shoppers would “definitely” or “probably” change their consumption habits to reduce their personal impact on the environment. Out of all the possibilities to reduce environmental footprint as a company, the NPD Group reported that packaging is most visible to consumers, with roughly 20 million stating they have switched to a different food or beverage brand because of earth-friendly packaging.

Increased consumer scrutiny of single-use packaging waste has made sustainable packaging a top strategic priority for foodservice operators. Over half of adults that ordered take-out or delivery in the past 30 days reported that the restaurant they ordered from had earth-friendly practices, such as using food containers from recycled materials. Quick Service giant McDonald’s is beginning to take small steps towards these practices. In Norway, McDonald’s is producing serving trays made of marine plastic waste from the Nordland coast. The plastic trays are made from 100% recycled marine waste that can be repurposed multiple times. Norway locations are beginning to transition from the old dining trays to the green trays as needed. In Japan, McDonald’s restaurants launched the Happy Meal toy recycling program. At all locations, customers can find recycling boxes for plastic Happy Meal toys to be turned into dining trays. In just two months, the restaurants collected 1.27 million toys, which were

reborn into 100,000 trays. Burger King is also using old toys to create trays and new play areas, with restaurants in the United Kingdom offering a free meal with a purchase in exchange for plastic toys as part of a limited time offer. Globally, Dunkin’ Brands is on track to eliminate Styrofoam cups from its supply chain by mid-2020. The elimination is expected to remove approximately one billion foam cups from the waste stream annually.

Marketers need to comprehend that sustainability may be a deciding factor for consumers. Research from the NPD Group indicates that while concerns like taste, convenience, health, and affordability are still primary factors for choosing foods

and beverages, a company’s sustainability efforts can be the tie breaker if all other factors are equal. Now more than ever, it is unacceptable to act irresponsibly. Organizations are being held accountable for their actions like never before and need to manage their reputational risk. These sustainability efforts will ensure brand loyalty for companies, and Rabobank reported that such initiatives can lower operational costs. While the reality is that there is no simple solution to combat plastic-packaging waste, companies along the chain are increasingly acknowledging the need to create workable solutions. [UB](#)

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Shellfish items swimming upstream as 2019 comes to a close

A constant dialogue during the fall and deeper into the last quarter of 2019 has been several premium shellfish items continuing to firm with almost no end in sight. In some instances, a lack of supply is to blame, but for others, increases in imports points to what appears to be an insatiable demand for shellfish.

KING AND SNOW CRAB

Both king and snow crab demand has been active during the fall and into December. Most sizes are sitting at either all-time highs or 52-week highs.

Both Russian red and golden king crab is seeing upward pricing pressure on all

sizes, especially reds on the larger count sizes. This pricing pressure is about even with imports out of Russia, specifically on red and blue king crab, which are higher year-to-date (YTD). Red king crab out of Russia is up 17.7% through September and Blue king crab (which is typically sold in the U.S. as a red king crab equivalent) is up 48.8% out of Russia. Imports of golden king crab out of Russia are actually down 17.9%. However, Alaska's Western Aleutian Islands Golden king crab fishery has a quota of almost 2.6 million pounds. With roughly 1.45 million pounds harvested so far, the need and demand for king crab in the U.S. had some assistance.

The market out of Canada for snow crab has been firm since the end of August on all sizes. For most of the season, larger snow crab, in particular, saw thinning supplies, but market participants report that all sizes are moving quickly, and supplies are growing tighter. New season crab out of Canada will not be around until the end of April or early May 2020. Alaska announced a 24% quota increase for snow crab—an increase of 6.5 million pounds to the market. Still, product will not reach the lower 48 until sometime into the new year. All sizes in the Gulf are at all-time highs. Out of Newfoundland 8s and 10s are at all-time highs and 5-8s are at a 52-week high. Imports of Russian snow crab through September are down 6.6%; thus, adding to a lack of available snow crab in the current U.S. market.



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LIVE LOBSTER

Live lobster prices have been decidedly firm throughout the summer and fall as supply has been extremely limited. The Maine lobster fishing season by all accounts has been disappointing; reports indicate that landings are off 25-50% from last year. In addition, the Canadian fall fishing seasons have been marred by poor quality and limited historical volumes. Add to this a low stock situation throughout the industry, and a strong demand from the processing sector, prices are firm. Both hard shell New England selects and New England new shell halves are currently trading 25% higher than their 10-year averages.

Exports of live lobster to Canada for the third quarter registered 26.6 million pounds, down 31% compared to Q3 2018. Exports to Canada have been trailing their 5-year average throughout the summer. September exports registered 11.4 million pounds compared to their 5-year average of 13.4 million pounds, a 14.4% decline. YTD 2019 total exports are down 36%, exports to China are down 77%.

Market participants hope the opening of the highest volume producing LFA 33-34 in late November will make an impact.



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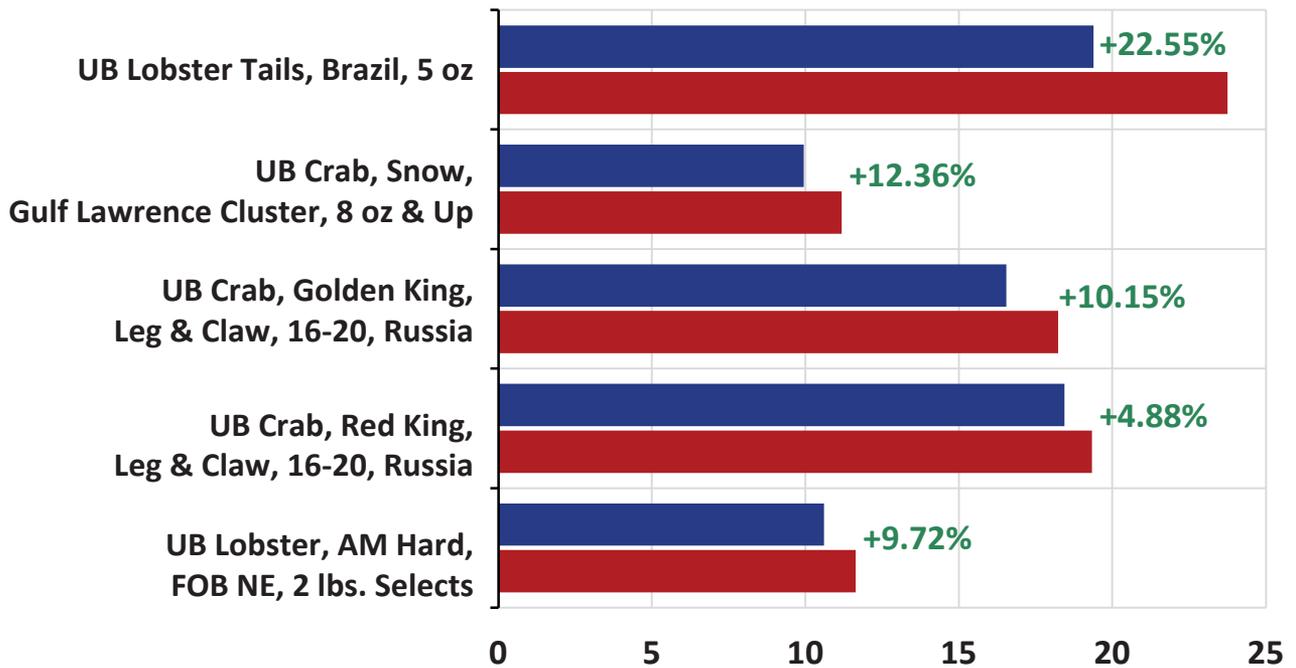
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Nov. 11 YOY Percent Change

Source: Urner Barry

■ 2018 ■ 2019



“In some instances, a lack of supply is to blame, but for others, increases in imports points to what appears to be an insatiable demand for shellfish.”

LOBSTER TAILS

The lobster tail market has many sizes and types sitting at all-time highs. The complex has exhibited strength throughout the year and the price line has shifted higher. Prime tails have been limited, especially from Brazil. Supplies of North American have also been tight throughout. Despite the higher prices, demand remains robust. Even as asking prices advanced, buyers were more than willing to meet those numbers in order to fill orders. The initial leg up was attributed to the cruise industry but the interest has been broad-based. Lobster meat is sitting at 52-week highs, recently crossing 2017 levels, and only sitting below prices during the record-high 2016.

As of the middle of November, Prime Brazil Tails, 5 oz. are over 10% higher than the

start of the year and 19% higher than the same time last year. It's the same story on similar sized Caribbean, 15.4% higher than January and 20% higher than last year. North American 4-5oz tails are over 11% higher on the year, and over 15% higher than November last year.

Interest remains strong and it will be interesting to see just how high these levels could pierce. UB

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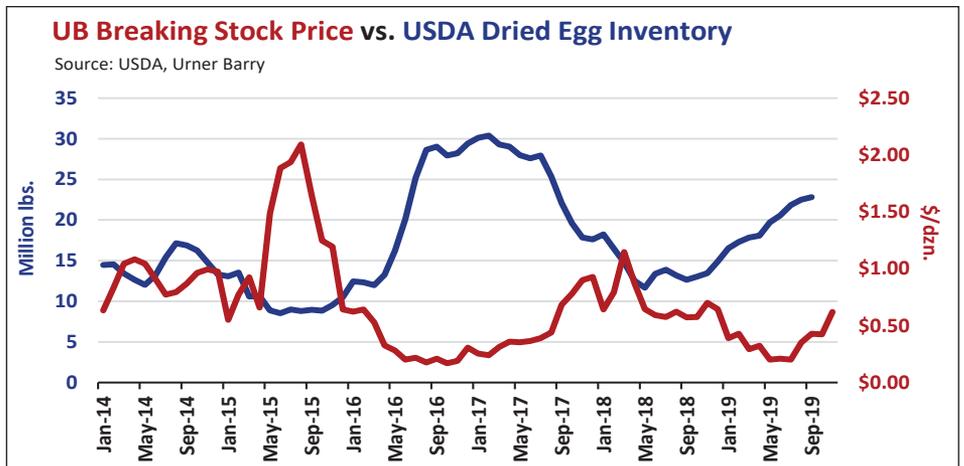
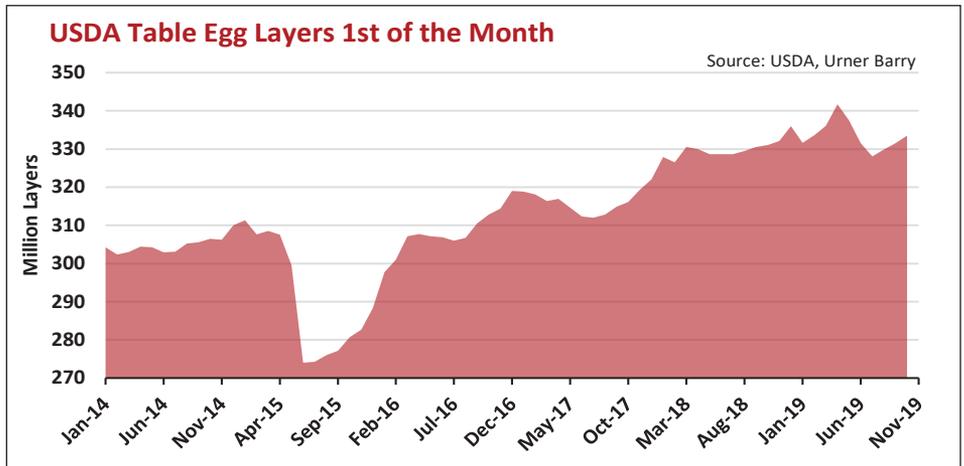
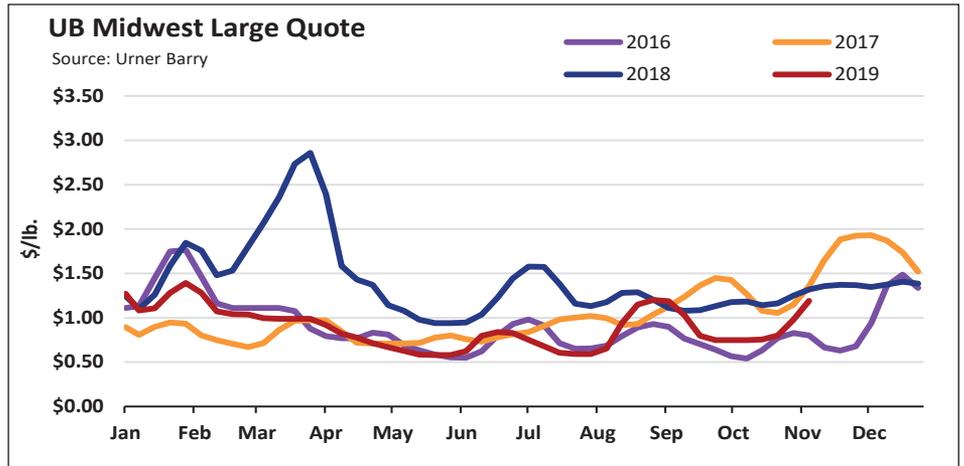
Egg prices jump more than 60% ahead of the holidays

US shell egg prices rose sharply heading into the 2019 holiday season. From the lows seen in the middle of October, the benchmark Midwest large quote jumped more than 60%, nearing the highs for the year hit back in late January.

Demand has been relatively strong, though supplies have been available for much of the year. This is at least partially due to cage-free and specialty expansions, as producers prepare for California Proposition 12 and corporate cage-free deadlines in the years to come. According to the USDA, the October flock is up about 2.5 million birds from the same time last year, though rate of lay is also up about 1%. Total cage-free layers have hovered near the 70 million bird mark, which is up over 10 million from 2018. Total egg production is up 3.2% through the month of September.

Though exports of egg products have been down YTD, shell egg exports are up 22% over last year through August. Participants are reporting good demand from Hong Kong and Mexico, but saw call really pick up from Canada in October as they prepared for their Thanksgiving. This demand pulled some of the heavier sizes away from processors, who shifted their attention to lighter weights. Seasonal demand from domestic distributors began to pick up shortly after, as buyers started to stock their coolers ahead of holiday needs and a potential market rally. This further tightened supply.

Through the back half of October, producers found themselves in a better balance and were able to hold asking prices much closer to break-even prices. This was a vast improvement from market levels and the prices began to respond higher. Now competing with exports, domestic buyers, and opportunity in the graded sector, processors jumped in the market for breaking eggs and liquid, willing to pay premiums in both sectors.



Though total dried inventories are more than 22 million pounds, liquid buyers have struggled to find spot loads without paying premiums, as sellers look at

replacement costs and other opportunities for shell eggs. Liquid whole egg prices are up 70% in the same period.

“Through the back half of October, producers found themselves in a better balance and were able to hold asking prices much closer to break-even prices...”



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Shell egg inventories were reported at 1.494 million cases in the week ending Monday November 4th, according to the USDA. That puts inventories 2.4% behind year-ago levels. Even with the recent price advances, the MW large quote is still only about on par with the same time last year.

Thanksgiving is one of, if not the best, periods for egg sales. Retail features are planned throughout the month, but planners may not have expected to see current market levels so early, especially given the levels from which the rally started. It will be interesting to see how buyers respond to the recent market

advances. Producers, in the meantime, are hoping to salvage what's left of the year and evaluating potential impacts of the upcoming Prop. 12 rollout. [UB](#)

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CHICKEN Sandwich WARS



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Whether you're a loyal foodie hungry for a new twist on an old favorite, or a chicken industry veteran who has weathered more than a few conflicts, almost everyone has heard of or were quite possibly impacted by the great chicken war of 2019. This past summer one certainly couldn't tweet, turn on the TV, listen to the radio, or pop in your favorite fast food establishment without seeing or hearing some reference to the month-long marketing campaign turned social media phenomena. Chicken wars dominated media discussions and tweets went viral. The success of the marketing campaign also had its upsets—including forcing Popeyes to stop selling the sandwich. By why would they do that?

Participants in the wholesale food business understand the disconnect, or at least reduction in overall impact between happenings in the commodity market and the consumer experience. Only on rare occasions do these two worlds collide and interact. Well, to the surprise of many, such was the case during the recent twitter war between Chick-fil-A and Popeyes, where social media broke down this barrier.

Popeyes new chicken sandwich, a breaded, boneless breast jazzed up with spicy mayo and pickles positioned snugly between two fluffy brioche buns, made quite an entrance into the fast food sphere, but no one expected it to start a war. Even fewer expected it to have significant market impact.

So what happened? On August 12th, Popeyes tweeted:



Chick-fil-A tweeted a similar sentiment, albeit with more arithmetic, on August 19th:



Popeyes hit back with the tweet heard 'round the world, put together in 15 minutes by their marketing team: "... y'all good?" The "Tweet Heard 'Round the World" sparked the Sandwich War of 2019.

Others were quick to get in on the action. The same day, Wendy's exploded into the ring with aggression: "Y'all out here fighting about which of these fools has the second best chicken sandwich." Popeyes response? "Sounds like someone just ate one of our biscuits. Cause y'all looking thirsty." Wendy's persisted: "lol, guess that means the food's as dry as the jokes".

The critical hit came when Popeyes entirely sold out of their new sandwich after only 15 days. The chain "aggressively forecasted demand through the end of September" but locations nationwide were left with overworked employees—some choosing to walk out—mobs of irate customers, and "sandwich sold out" signs plastered on their front doors.

The sandwich was not the only thing to sell out. Chicken processors were handed a gift of sorts at a time that they were much in need of one. In general, fast food operations are using boneless skinless breast meat cut from a "small" sized chicken.

That meat is termed as “Select” because in a world of large chickens and plenty of jumbo boneless, skinless breast meat always on hand, the small product is truly something special or unique. So special that, with small breast meat inquiries and orders going through the roof, some chose to reorient production and therefore supply, by cutting up and deboning WOGs, the chicken used for fast food or, more recently, the popular rotisserie chicken. By deboning WOGs to provide the much-needed meat, the WOG market appreciated in value. Urner Barry’s 3-3.5 lb. WOG quotation rapidly advanced, ascending from \$0.56/lb. to \$0.68/lb. in only one month, a 21.4% increase. At the same time, when jumbo boneless values were reeling under the pressure of ample production declining about a dime during the period, Select boneless meat advanced.

Elsewhere, the war was negatively impacting some of the parts that were a by-product of the deboning process. Small wings embodied this idea, with the extra loads giving the market more than it could handle. Subsequently, small wings fell from \$1.55/lb. to \$1.41/lb. as supplies proved excessive even for seasonally heightened requirements.

THE RETURN OF THE SANDWICH

The Popeyes chicken sandwich returned on November 3, and the debacle continued. A crazed customer in Los Angeles damaged her Mercedes when she squeezed in between two concrete poles in a mad dash to get ahead in the drive thru line. Houston Texans quarterback Deshaun Watson was kicked in the face but attributed a speedy recovery to the Popeyes spicy chicken sandwiches he ate.

The Chicken Sandwich Wars have left their mark. Data from Numerator estimates 92% of people who got a bite of Popeyes newest addition are “somewhat” or “extremely likely” to return for another sandwich. No one foresaw the visceral reaction consumers had to the sandwich, and the aftershocks will surely be felt in the fast food industry for a while to come. But now that the culture’s been established, when and where will the *next* sandwich war be fought? [UB](#)

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The Urner Barry staff sampled three of the top chicken sandwich contenders: Popeyes, Chick-fil-A, and Wendy’s.

View the video on Urner Barry’s YouTube channel here:

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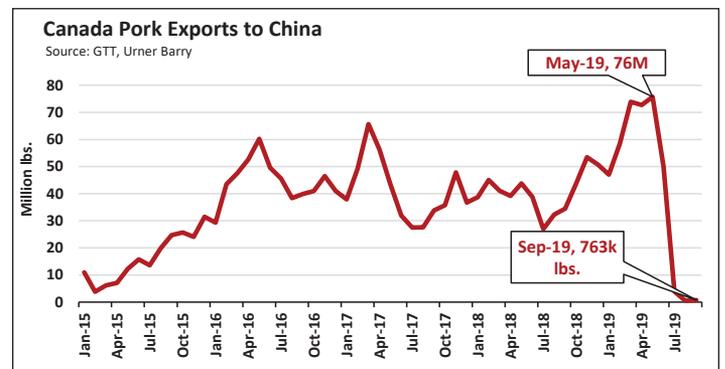
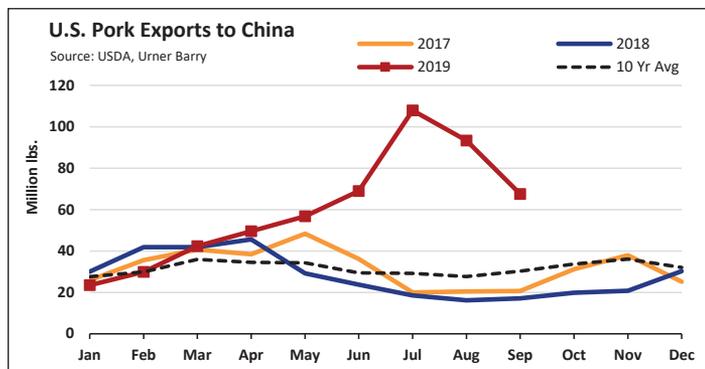
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One year update on African Swine Fever

August marked the one-year anniversary of when the world became aware of the African Swine Fever outbreak in China. Just since this May, African Swine Fever has spread to Vietnam, Philippines, Laos, Cambodia, North and South Korea, and Timor-Leste. Since 2018 in Europe, there have been cases of ASF reported in Lithuania, Latvia, Poland, Belgium, Slovakia, Hungary, Serbia, Ukraine, Moldova, Romania, and Bulgaria. Mongolia, Russia, South Africa, Zimbabwe, Kenya, Chad, and Cote d'Ivoire have also reported instances of the virus. Fortunately, up to this point, North, Central, and South America have been spared. African Swine Fever is truly a global epidemic and has already had a material impact on both protein availability and trade flows.

China's ministry of agriculture recently estimated that their September hog herd was 41% below a year ago. Unofficial estimates extend far beyond that, leaving a massive void in global protein supplies either way. So, how has the global protein market shifted because of this outbreak? Let's take a look at some key figures.

©sakepaint/Getty Images



United States pork exports to mainland China have had a banner summer, and while flows have softened from the July high, they continue to be historically robust. Pork exports to China were up 104% year-over-year during the January to September period.

We have also seen a shift in what type of pork products are being exported to China. As they have such a large deficit in pork supplies, Chinese processors are in need of most parts of the animal, making carcasses an increasingly popular item to import. Looking at U.S. census data, we can see that 173 million pounds of pork destined for China was marked as a carcass, versus almost nothing a year ago.

The United States is hardly the only country to have enjoyed increased Chinese demand for pork products this year. Double to triple-digit percentage gains in year-over-year export flows have been seen by every single one of the top 12 suppliers of pork to China.

On November 5th, the Canadian market was reopened to China, which was a significant development in North American trade relations with the Asian nation. For background, on June 5th, China

declared that they would be conducting significantly increased inspections on imported Canadian pork. Due to counterfeit vet documents, on June 25th China effectively shut off all pork imports from Canada. The result of this action was a precipitous drop in Canadian pork exports to China, falling from 76 million pounds in May to less than 1 million pounds in August. The resumption of this trade could have a material impact on certain pork supplies in North America.

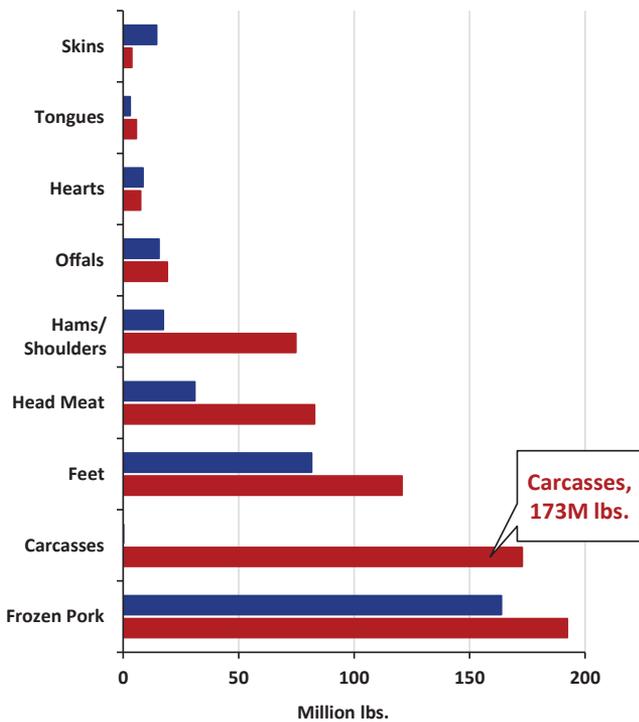
Developments with the African Swine Fever situation across the globe continue to happen almost daily, with industry participants anxiously watching for shifts in demand, updates to the trade war, and any news of further spread or a solution. Featured on COMTELL is an "African Swine Fever Dashboard" that lists all the most current news and analysis on the virus and contains multiple maps which chart the virus outbreaks across the world. Be sure to check out that dashboard if you are interested in keeping up to date with the spread of ASF. [UB](#)

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U.S. Pork Exports to China by Product Type

Jan-Sept Total

■ 2018 ■ 2019

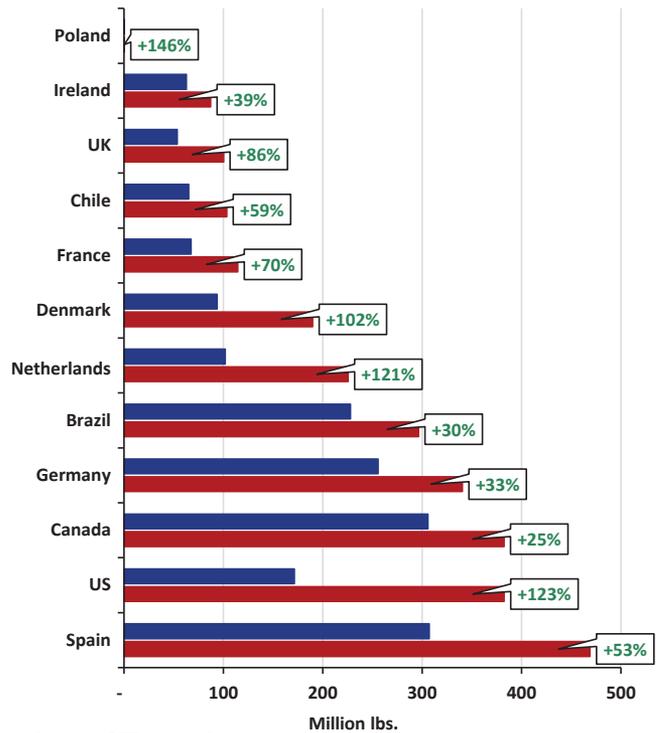


Source: FTD, U.S. Census, Urner Barry

Global Pork Exports to China

Jan-Aug Y-O-Y Change

■ 2018 ■ 2019



Source: GTT, Urner Barry

“United States pork exports to mainland China have had a banner summer, and while flows have softened from the July high, they continue to be historically robust.”



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New year, new trends...

A 2020 vision of *food trends*

As we ring in the new year, food trends from the previous decade are expected to expand while fresh concepts will emerge. Shifting demands for flavor innovation and health are steering menus to reflect sustainable ingredients, proving the prioritization of social responsibility is influencing the industry to respond creatively. Workforce trends are also underway, as global economic factors and labor concerns gain steam, and consumer behaviors are impacted. As these developments connect, they are predicted to create a lasting impression on the foodservice industry in the new year and going forward.

According to research conducted by Technomic, shades of trending ingredients are beginning to curtail. However, greens are expected to pile up on plates, including rabes, lettuces, and kale. Meanwhile, leaf vegetables, peas, and absinthe will dominate beverages. Additionally, blues will be seen with spirulina and butterfly peas. Also, herbs and vegetables such as corn, basil, and potatoes will bring variations of purple.

As the plant-based movement continues to expand, foodservice operators will need to keep menus exciting and consumers intrigued. The trendiest brands will be slowing down on soy in 2020 and replacing it with innovative blends such as mung beans. As the plant-based movement gains traction among flexitarian eaters, brands are looking to avoid as many of the top allergens as possible, therefore countless items will become soy-free. Overlooked parts of common plants, such as beet greens and avocado blossom, will gain attention as a form of waste reduction. As another sustainable initiative, seaweed is forecasted to make waves in snacks and desserts alike. Consumers can also expect more alternative dairy options, with nuts and seeds paving the way for oat, fruit, and vegetable milks.

“Shifting demands for flavor innovation and health are steering menus to reflect sustainable ingredients...”

Sustainability is emerging as part of the foodservice industry’s circular economy, with upcoming efforts calling for reusable cup programs, straw-free lids, and compostable packaging. This growing awareness among consumers has led to a fundamental shift in restaurants’ philosophy, from “create-use-recycle” to “create-use-reuse-sustain.” These new efforts are predicted to impact all aspects of the supply chain.

Within the next six years, 80% of Millennials will be parents. Every day, an estimated 10,000 baby boomers retire from the workforce. It is becoming more crucial for the foodservice industry to recognize this generational shift that each group is currently experiencing and will continue to in the new decade. The needs among older boomer and Millennial consumers vary from their counterparts, just as needs among the younger Generation Z versus older Generation Z differ. Going forward, the savviest companies will abruptly pivot and develop a strategic tone to target distinct subgroups within each generation.

While restaurant growth has been expanding rapidly for years, guest traffic has weakened. Even as more locations launch, delivery is booming. This dilemma has left the industry in a delicate situation, contemplating whether to go all in on delivery, double down on a position created to lure customers in the door, or invest in a hybrid concept. Off-premise occasions will continue to flourish in the new year, with Technomic’s research showing that 78% of foodservice operators consider this a priority. However, the traffic battle, along with incorporating trends onto menus will bring a whirlwind of counteractive efforts that will continue beyond 2020. [UB](#)

Article contributed by **Andraia Torsiello**
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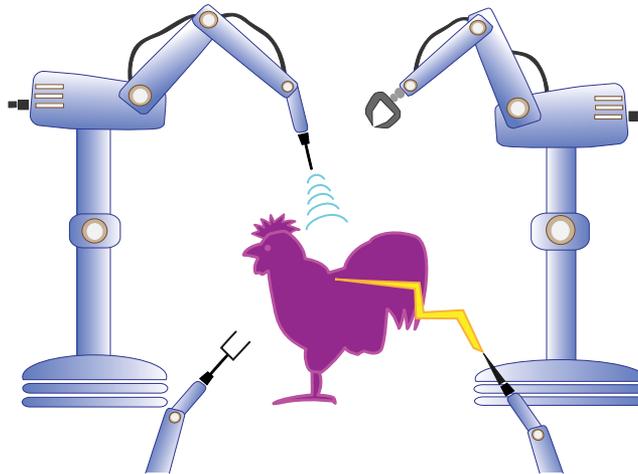
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ARTIFICIAL INTELLIGENCE: Paving the way towards more efficient poultry production

Artificial intelligence (A.I.) can best be defined as a computer or system of computers used to replicate human intelligence. This includes visual perception, vocabulary, analytical decision-making processes, and translation between languages. A.I. technology is far-reaching. It is currently utilized in a variety of forms and functions around the world, which range from spam email filters up to commercial aircraft autopilot systems. The enhanced capabilities of machine vision, neural networks, and deep learning, however, have begun to carry us into a new realm in which computer technology can, in some cases, exceed human capabilities.

With the US chicken industry booming, it should come as no surprise that A.I. based technologies have begun to percolate into the poultry world. The industry continues to push forward in its never-ending quest to maximize efficiency and improve animal welfare standards. Although chicken has often been touted as one of the world's most efficient and cost-effective protein sources, the sheer scale of the industry leaves plenty of untapped potential for machines to further improve upon existing benchmarks.

A.I. is not just a future prospect, either. Increasingly, computer intelligence can be found in a variety of forms and functions within the poultry sector. In many instances, it plays a complementary role to other existing types of technology, such as robotics. In response to ongoing labor-related challenges and decreasing unemployment rates, for example, some companies have begun to market automated processing machines which utilize sensors to assess variables such as meat density and bone content. In turn, this



**“...A.I. based technologies
have begun to percolate
into the poultry world”**

helps computerized robotics to make more precise cuts which are on par with that of a human, and in some instances, can surpass the speed of their human counterparts.

A.I.-enhanced robotics, however, are only one part of the equation. Increasingly A.I. technology has turned up at the farm level where environmental and flock health monitoring systems are used to collect, assess and track a multitude of different variables. This data is then used to either automatically adjust different inputs or relay information directly to the farmer to intervene. The use of deep learning and three-dimensional modeling helps to detect early warning signs of nutritional deficiencies, bone deformations, decreased growth rates, and avian diseases. Here, a specialized image or series of images is fed to a machine, which, in turn, produces a three-dimensional representation of the bird or group of birds in question. This model is then fed to a program which compares and contrasts it with a vast series of healthy and sick

bird models to ultimately draw a conclusion. These minor biological and physical changes, which are annotated by a computer, can help farmers to identify traits that may not necessarily be apparent to the human eye, especially when managing an entire commercial flock.

Another potential use for this technology is the ability to detect behavioral changes. Although pecking is a perfectly natural behavior for birds, oftentimes,

hostility can impact the welfare and livability of birds within the flock. By utilizing an AI learning system, a computer can differentiate between ground pecking and hostile pecking and alert the farmer when necessary. It can also highlight injured birds based on their behavior and health of feathers. The sound of the birds is another critical indicator of temperature-related stress and even many diseases such as Avian Influenza and New Castle Disease. By recording audio data and running it against an A.I. learning model, producers can analyze the auditory indications of flock health and proactively hone in on and eliminate the cause of any distress signals.

With poultry production only expected to rise in the years ahead, feed conversion ratios, bird health, and other various forms of processing efficiencies will be paramount to the future expansion of the industry. The utilization of A.I. will help to complement existing systems that are currently in use as well as inspiring new forms of technology to help processors rise to the call of increasing global demand patterns. [UB](#)

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Attendees give rave reviews...

Sold-Out Global Protein Summit a smash hit in Chicago

Attendees raving about the first ever conference, applauding speakers, insights, and prime networking

The Global Protein Summit debuted in Chicago this October—with those in attendance hailing the program as timely, illuminating, and critically important. The sold-out event, hosted by Urner Barry, featured a hard-hitting lineup of expert presenters covering the biggest topics impacting the beef, pork, and poultry business.

Two days of packed content, 25 speakers, protein-specific breakouts and unparalleled networking opportunities defined this inaugural

event, held at the InterContinental Magnificent Mile in the heart of Chicago. The show brought together common themes affecting the supply chain, including China, trade agreements, African Swine Fever, the economy, alternative protein competition, and what to expect as we look ahead.

Attendees were afforded an in-depth look at the state of the global economy and where U.S. trade relationships stand with current and potential export partners; hearing from expert speakers including Brett Stuart, Founder, Global AgriTrends; Will Sawyer, Lead Economist, Animal Protein, CoBank; Daniel Sumner, Professor at the University of California, Davis and Co-Editor of the China Agricultural Economic Review; and Nathan Kauffman, Vice President and Branch Executive, Federal Reserve Bank of Kansas City.

It was standing room only at the much-anticipated African Swine Fever panel—featuring Todd Thurman, Owner, SwineTex; Rob Murphy, Executive VP at J.S. Ferraro & Co; Dave Pyburn, Chief Scientist, National Pork Board; and Brett Stuart treating attendees to another appearance as the final panelist of this dynamic discussion.

From the session on Alternative Proteins with Rabobank's Christine McCracken to breakout sessions featuring market-specific impacts on the beef, pork, and poultry business—attendees walked away with cutting-edge data and unparalleled insights to better strategize in this increasingly complex environment.

Additionally, the networking at GPS was hailed as second to none. In attendance were distinct professionals from varying segments of the entire supply chain, offering diverse perspectives and ample opportunities for expanding connections across the board. Plus, nothing brings people together like good food and drinks, both of which were served in excess at Monday night's cocktail reception at Chicago's EATALY. And the gelato—*ohh the gelato*.



But don't take our word for it. Here's what a few attendees had to say:

"I've got to tell you, for the first ever Urner Barry Global Protein Summit, it's been extremely informative. It's given us information pertaining

to labor, supply, global pricing, ASF—it's been a very informative program and I'm looking forward to coming next year because I think it's going to be even bigger and better than it was this year."

"I particularly enjoyed stories from the guys that have been on the ground in China, that can come back with real life stories of what's happening as far as pork and hog price inflation, losses associated with ASF—that's always very interesting and important to us."

"It's really good to get some insight from a lot of industry leaders."

"There's a lot of moving parts in our industry right now. It was the perfect time to come together for something like this and try to think through some of these really big issues that are going to affect the future."

"This is really a pretty neat and unusual event. Urner Barry has done great performances over the years with Executive Conference and that—with this event though being more tailored to red meat, it was really an interesting event. And there's not [a conference] that's real similar to this, or to the degree and magnitude of what we've done here. This has been an outstanding presentation—the group of speakers, a number of economists; and what's interesting too is the blend of people here—it's very diverse. This has been outstanding."

Urner Barry was thrilled to host this epic, first-ever event and due to the overwhelming response has already begun setting things in motion for next year's show (bigger venue this time we promise)! Be on the lookout for updates on the 2020 Global Protein Summit. A sincere thanks to our partners, sponsors, presenters and attendees for making this event so compelling and impactful. [UB](#)

Article contributed by Jamie Chadwick | jchadwick@urnerbarry.com

For details about GPS 2020 and sponsorship opportunities, please call 732-240-5330.

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Cracking one of the egg industry's most controversial issues: Culling male chicks

It's one of the more grisly, lesser-known secrets of the egg industry: roughly 6 billion male layer-type chicks are killed globally every year within hours of hatching. The United States is the world's second-largest egg producer, yielding about 9 billion dozen eggs annually. To keep up with rising demand, the number of laying hens also continues to grow. But only about half of the chicks hatched are female, and in the egg industry, there simply isn't any use for the males.

Sexing chicks—determining whether they are male or female—is done by skilled workers at the hatchery shortly after their birth. Healthy females are transferred to a pullet house where they are nurtured to a suitable size for laying and then moved to a production facility. Their male counterparts, disquieting as it may be, are merely an undesirable byproduct of egg production. Since they are unable to lay eggs and lack the right body composition to be used for meat consumption, they provide no economic value and are therefore disposed of, either by gassing or grinding, a practice known as culling.

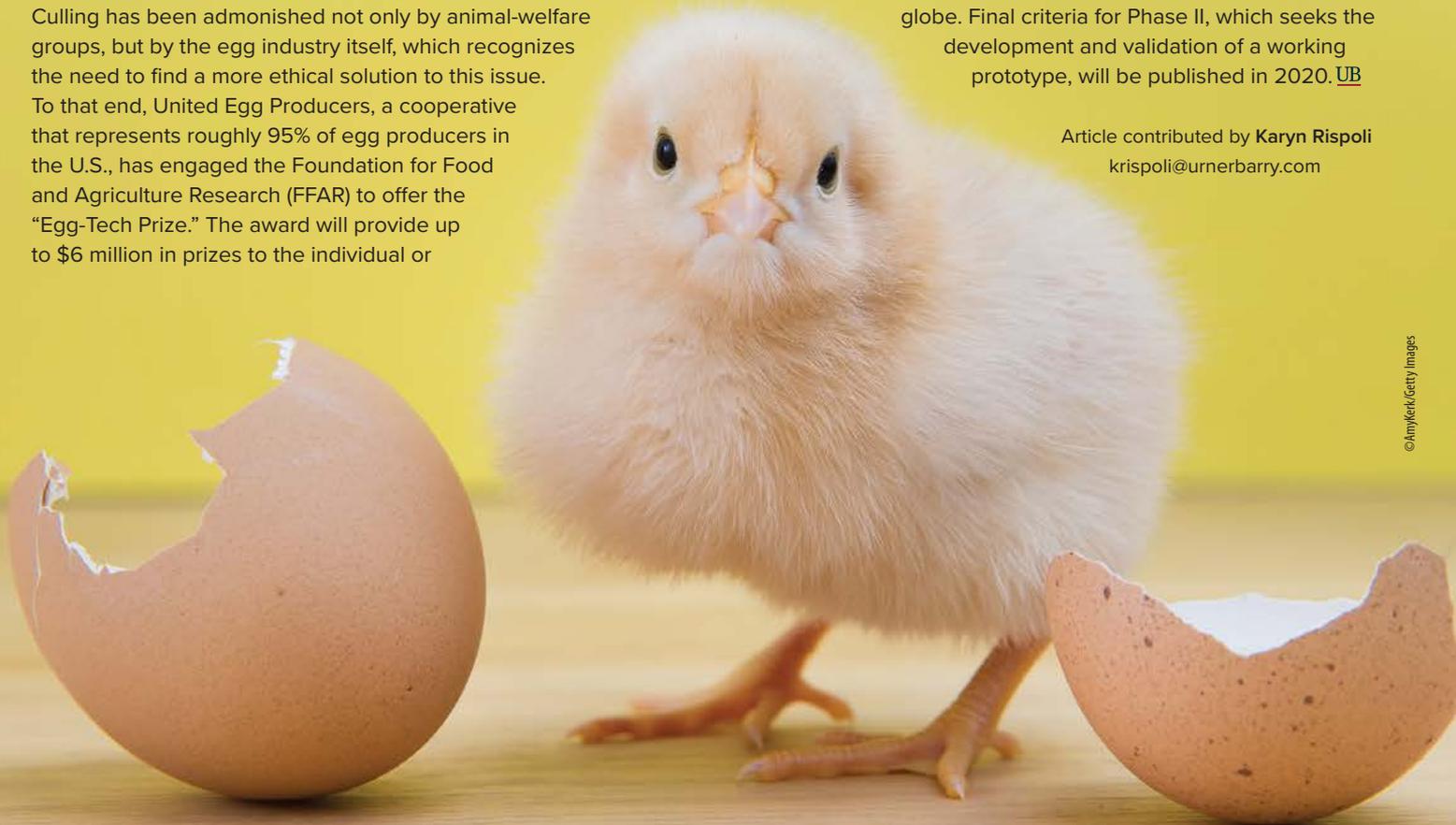
Culling has been admonished not only by animal-welfare groups, but by the egg industry itself, which recognizes the need to find a more ethical solution to this issue. To that end, United Egg Producers, a cooperative that represents roughly 95% of egg producers in the U.S., has engaged the Foundation for Food and Agriculture Research (FFAR) to offer the “Egg-Tech Prize.” The award will provide up to \$6 million in prizes to the individual or

team that can develop technology that will accurately and quickly determine the sex of layer chicks before they hatch, effectively eliminating the need to cull day-old males.

While worldwide initiatives to solve this challenge are underway—ranging from gene editing to measuring an egg's hormone levels to determine its sex—current approaches present various drawbacks that would likely prevent global adoption. FFAR is confident, however, that the industry can build upon recent advancements to come up with “clean” technology that is highly reproducible and that functions prior to incubation, allowing male embryos to be identified and eliminated humanely.

According to FFAR, the Egg-Tech Prize “has the potential to revolutionize U.S. and global egg production.” A viable solution would not only be a huge win for animal welfare, but it also stands to save egg producers up to \$2.5 billion annually in lost-opportunity costs that hinder farm profitability. Phase I of the competition concluded in November, with the announcement of six finalists selected from 21 entries across the globe. Final criteria for Phase II, which seeks the development and validation of a working prototype, will be published in 2020. [UB](#)

Article contributed by **Karyn Rispoli**
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Export sales and processing capacity critical issues for U.S. pork, beef industries

Looking back on the events of 2019 makes it clear just how important export sales and having adequate processing capacity are for the U.S. pork and beef markets.

The cattle markets were rolling along through the spring and into the summer with one of the strongest demand periods in recent years. Then, in early August, news of a fire at a plant in Kansas, and predictions that the damage was extensive enough to likely keep the facility from resuming cattle harvest operations the balance of the year, led to limit declines in futures the following two trading days. Over a period of five days, October cattle futures tumbled \$8.70 per cwt, or approximately \$122 a head for a 1,400-pound steer.

The main concern among futures traders was that the remaining plants would not be able to keep up with the large supplies of slaughter-ready cattle expected to be available throughout the fall and into early winter. Although cattle futures eventually recovered as the remaining plants boosted daily and weekend operations to levels that at least approached what would have been attained had there been no fire-related closure, the event showed how tenuous and fragile the market can be to such news.

In the case of hogs, producers expanded output in 2018 and again in 2019 in anticipation of increased world demand for pork due in part to the rapid spread

of African Swine Fever in China and elsewhere in Asia, along with growth in U.S. pork processing capacity.

However, trade issues with China and unexpected delays in getting the new plants open, along with slower than expected gearing up periods at some facilities, led to surplus hogs available to the market, which weighed on cash prices for extended periods. Record large supplies available at times exceeded slaughter levels and led to some loads being carried over a few days or into the following week. That contributed to periods of weaker prices and significant losses for some producers.

Weekly slaughter rates during October averaged nearly 2.7 million head and exceeded the previous year by about 6.1%. Should supplies expand any further without any additional processing capacity available, the market could be under even more pressure. It would seem that producers are dangerously close to pushing output too high, which could drive cash prices down even if demand for pork is strong. [UB](#)

Article contributed by **Curt Thacker**
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“...the event showed how tenuous and fragile the market can be to such news.”

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Raw Seafoods, IBM aim to improve seafood consumption through blockchain

Does America have a fear of fish? Americans don't eat enough seafood. USDA data shows that most adults in the country do not eat the recommended two servings per week.

Dan McQuade, Vice President of Marketing for Raw Seafoods, a Massachusetts-based company, is looking to solve that. Raw Seafoods announced a partnership with IBM Food Trust to implement blockchain to digitize a supply chain for scallops that are sourced from the Atlantic Sea Scallop Fishery.

McQuade and IBM believe this can enhance traceability for the product and increase consumer trust and in turn, improve seafood consumption.

"We have a trust issue," McQuade said. "There's a lot of seafood fraud that happens in the United States and every time that

happens it hurts companies like Raw Seafoods and our customers who are doing things right."

From seafood mislabeling to sustainability concerns, McQuade described the industry's issues as causing a "fear of fish."

In an effort to make consumers confident when ordering seafood at a restaurant or at the seafood counter at the supermarket, McQuade is turning towards technology and blockchain to prove the scallops coming from Raw Seafoods are safe.



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IBM and Raw Seafoods' collaboration began after McQuade had an epiphany about the outbreak of E. coli linked to Romaine lettuce.



Picture above and on opposite page: Raw Seafoods scallop harvest in action. Photo credit: IBM Blockchain

"For someone who's been in the perishable food industry for my entire career, I thought how could this happen? In the United States of America we cannot pinpoint the point of contagion where the problem originated from?"

After observing what IBM Food Trust was doing to improve Walmart's leafy green supply chain, he believed IBM could make similar improvements in the scallop supply chain.

18 months later, a fleet of scallopers owned by Captain Danny Eilertsen of New Bedford, Massachusetts, are uploading data of their catch onto the IBM Food Trust platform. Now, retailers and distributors in the supply chain can trace exactly where a multitude of scallops were harvested.

IBM Food Trust's platform can also follow when a boat has landed, when each scallop was graded, selected, packed, and shipped to its destination.

Raw Seafoods and those in the rest of the supply chain can now show consumers exactly where their scallops came from.

"Raw Seafoods is the premier example of how seafood can benefit from participating in a network like this," Suzanne Livingston, IBM Food Trust Offering Director said. "[Raw Seafoods] has not just taken Food Trust as a way to share data in the supply chain, but also using it to get more products to consumers."

Raw Seafoods is pushing even further to get the message out to consumers. The company is currently planning a consumer-facing app, which is connected to the Food Trust platform. The app will give consumers access to information about the scallops on the menu or at retail by scanning a QR code.

McQuade and Livingston credit the early success of the collaboration to both sides mastering one half of the equation. Raw Seafoods knows scallops and IBM knows blockchain.

"[IBM] was able to take their solution and make modifications to fit Raw Seafoods,"

McQuade said. "We were able to take this to the community we are serving, to the distributors and to the retailers."

Livingston noted that IBM isn't a food company. They depend heavily on clients like Raw Seafoods to understand what the industry is willing to accept and what solutions they are looking for.

"We are looking to facilitate changes in the industry where there has been desire for decades, but there hasn't been that push for adoption," Livingston said. [UB](#)

Article contributed by [Ryan Doyle](#)
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A look into the cuisine of a galaxy far, far away...

STAR WARS: GALAXY'S EDGE INTERGALACTIC EATS

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From Mickey-shaped pretzels to Rice Krispie Treats, Instagram-worthy food items have long added flavor to the immersive experience offered at Disney. But now visitors can enjoy tastes from a galaxy far, far away.

Inspired by George Lucas's epic space-opera film series, the newly opened Star Wars: Galaxy's Edge is a massive 14-acre land that opened at Disneyland Park in May and Disney's Hollywood Studios in August 2019.

Galaxy's Edge is set on the remote planet of Batuu. StarWars.com describes the planet as "home to those who prefer to stay out of the mainstream, and a thriving port for smugglers, rogue traders, and

adventurers traveling between the frontier and uncharted space" and a "safe haven for those looking to avoid the attention of the First Order."

Home to a diverse mix of humanoids, aliens and droids—including the iconic R2-D2 and C-3PO—the new land allows guests to immerse themselves in the Star Wars Universe by creating their own lightsaber, building a droid companion and taking a trip on the famed Millennium Falcon. And in addition to the variety of rides, park-goers can also indulge in some tasty treats.

Batuu has a host of Star Wars themed beverages and meals to whet the appetite. As guests take a trip through Batuu's Black Spire Outpost, they will likely fill up at Docking Bay 7. The Docking Bay is housed in a working hangar bay where diners can enjoy out-of-this-universe dishes, like Fried Endorian Tip-Yip (a fried chicken dish with roasted vegetable mash and herb gravy), Kaadu Ribs (smoked, sticky short ribs served with a blueberry muffin and cabbage slaw) and Felucian Garden Spread (plant-based "kefta" with herb hummus and tomato-cucumber relish, served with pita bread).

Another top option for those looking for a quick bite during their travels is Ronto Roasters, a quick service sandwich stand located in the Black Spire Outpost Marketplace. For the early risers, Ronto's features its Ronto Morning Wrap (scrambled eggs, grilled pork sausage, shredded cheddar, peppercorn sauce, wrapped in pita). For those trekking the Outpost in the Florida and California heat may want to cool down with Tatooine Sunset or Sour Sarlacc beverage. The dinner and lunch menus are headlined by the Ronto Wrap (roasted pork, grilled pork sausage, peppercorn sauce, tangy slaw, wrapped in pita) and sweet or spicy Nuna Turkey Jerky.



Above: Felucian Garden Spread
Below: Smoked Kaadu Ribs
Photo credit: David Roark/Disney Parks



Throughout the park there are a wide range of delights, from raspberry filled Oioi puffs to multicoloured milk drinks. Adult visitors can also enjoy a range of alcohol infused beverages such as the Jedi Mind Trick and Batuu Brew at Oga's Cantina, which can be found in Smuggler's Alley. Be warned, Oga's Cantina is known to serve an assortment of galactic travellers from bounty hunters to smugglers, and even the odd Stormtrooper.

Whether you have an insatiable appetite like Jabba the Hutt or a taste for the hard stuff like Han Solo, there is something for everyone at Galaxy's Edge. While flying the Millennium Falcon and taking selfies with Chewbacca have quickly become key attractions, the chance to indulge in guilty food pleasures will keep travellers—even those from a foreign universe—returning for generations to come. [UB](#)

Article contributed by Michael Nesbitt
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Take a trip through the best eats in the country music capital of the world...

Dining through Music City

Nashville, Tennessee may be known as “Music City” to most Americans, but the country music capital of the world features an impressive food scene.

Nashville became the hub of country music as far back as the 1700s when early settlers enjoyed tunes on the fiddle and buck dancing. The city also boasts historic venues including the Ryman Auditorium and the Grand Ole Opry. These are two legendary locations for musical entertainment in the country. The Ryman dates back to 1892 and the Opry was established in 1925.

Nashville, like many big cities, is broken down into neighborhoods and each area brings their own special charm. There are nine major neighborhoods that offer a variety of options and their own flare to the city.

With Nashville being the home for this year’s Annual Meat Conference, here are a few of the favorite eateries around the city that visitors rave over:

ROLF AND DAUGHTERS

This cute little joint is known for its fresh take on Northern Italian and Mediterranean cuisine. The chefs at Rolf and Daughters put a spin on the classics and offer guests homemade pastas and meatballs.

LOVELESS CAFE

A staple due to their biscuits, they serve up some mean Southern classics such as catfish and fried chicken.



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MAS TACOS POR FAVOR

One of the most popular spots in Nashville, this Mexican restaurant is known for their holiday tamales and quinoa tacos.

PRINCE’S HOT CHICKEN

You can get deep-fried chicken in four different heat levels, mild, medium, hot or extra-hot. One of the premier fried chicken spots in the city.

THE GRILLED CHEESERIE

Food truck turned brick & mortar, The Grilled Cheeserie offers a wide variety of just that, grilled cheese, along with some seasonally inspired treats.



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BUTCHER & BEE

Opened in late 2015, Butcher & Bee takes your middle eastern cuisine and puts a southern spin to it. With more of an industrial look to the building, the team made sure to make it a cozy gathering spot.

EDLEY’S BAR-B-QUE

Known for just that, their famous bar-b-que, Edley’s cooks their meat low and slow. Edley’s also offers farm fresh sides, a great addition to tasty bar-b-que.



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WALDEN

This swanky establishment was transformed from an old beer bar into the neighborhood cocktail-bar. Along

with a hefty list of bar snacks, there is a fun twist to their menu which includes fig-and-brie grilled cheese.

BLACK RABBIT

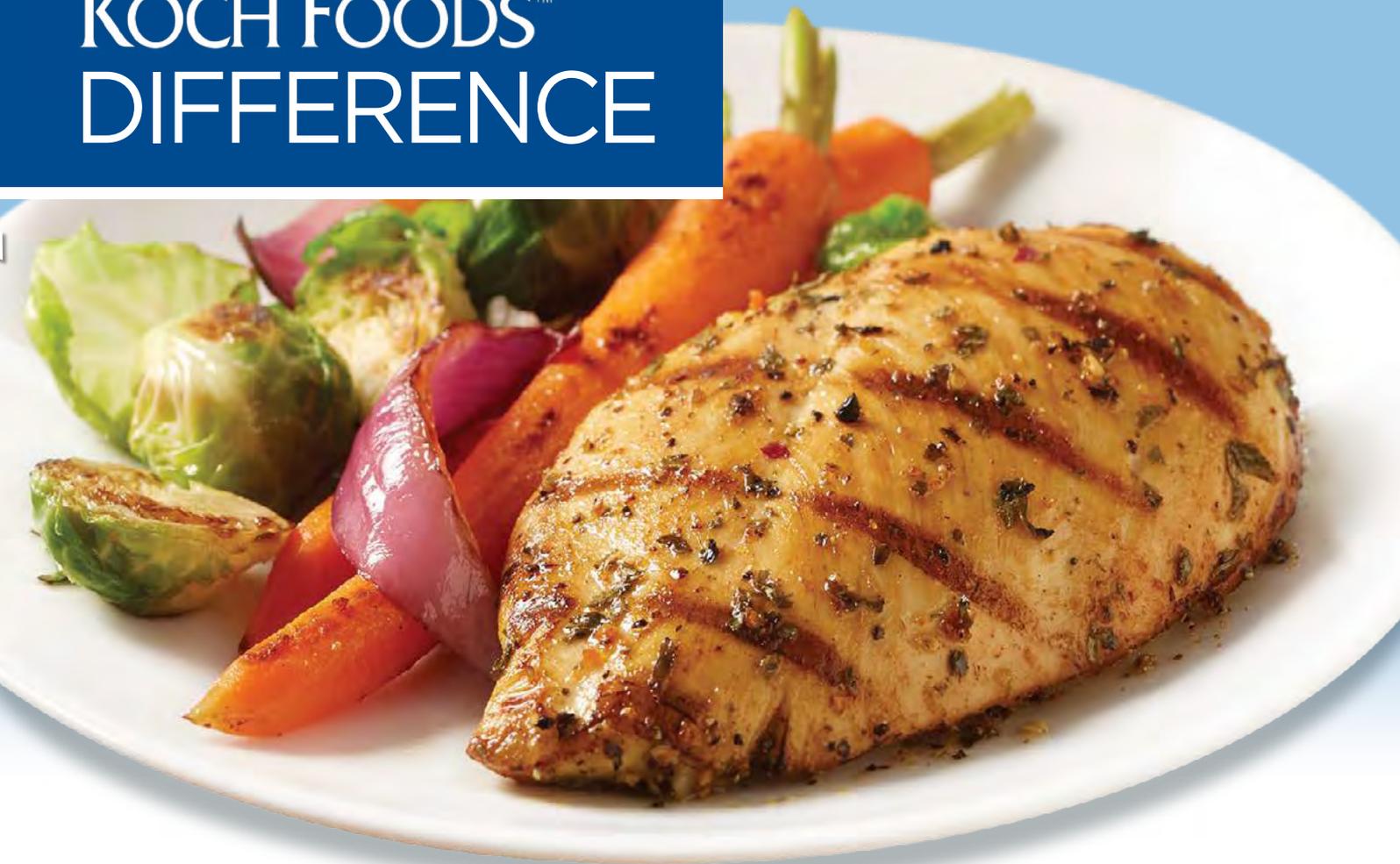
This sophisticated speakeasy gifts its guests a sophisticated yet comfortable cocktail bar. From their tailored drink menu to their small plates and beyond, there is plenty to be excited about.

CAPITOL GRILLE

Capitol Grille has a strong reputation for their steaks, but their other offerings including roasted lamp chop and sweet onion bisque impress. [UB](#)

Article contributed by Holly Graga | hgraga@urnerbarry.com

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Turkey Dinner

Article contributed by
Beth Breeding, Vice President,
Communications and Marketing,
National Turkey Federation

Time is a hot commodity. More than ever, we are making the most out of every minute of the day, so it makes sense that the trend of maximizing time also extends to mealtimes. Whether it's walking the grocery aisles or scrolling through Pinterest, one thing is abundantly clear: convenience is king.

But today's consumers aren't really looking for those quick, frozen meals that we know all too well from college. They want quality and freshness, and they're also increasingly interested in cooking at home. A report from Peapod last year found that 77% of survey respondents said they'd rather eat a homemade meal than go out for dinner.

The National Turkey Federation (NTF) sees this as an opportunity to get more turkey in grocery carts and on the plate. If folks are cooking at home, why not try turkey? According to Mintel, nearly a third of consumers eat turkey weekly, and 21% of consumers reported increased turkey consumption in the last year. However, for so many consumers, turkey is less likely to be viewed as a protein that falls into the increasingly important convenience category. That's where NTF's efforts to introduce consumers to simple, everyday ways to incorporate turkey into meals comes into play. As more consumers better understand turkey's versatility and how it fits into a weekly meal plan, we can further amplify turkey's spot in the marketplace (and the meat case).



It doesn't have to take hours to roast your turkey. There are plenty of ways to pull together a quick, healthy and flavorful turkey meal without breaking a sweat. And contrary to the old rumors you've heard, when it's cooked properly, you can't beat a tender, juicy turkey. Here are some ways we are working to transform how consumers bring turkey to the table.

GO, GO GADGET

Shield your eyes, kitchen minimalists. It's gadget time. Unless you've been living under a rock, the odds are pretty good that you have heard of the famed Instant Pot. This multi-functional cooker works its magic in a fraction of the time and has come to my rescue on several occasions.



When you're thinking of different ways to prepare turkey, don't count out the Instant Pot. Reaching new audiences of potential turkey consumers means that turkey has to meet them where they are. For many home cooks, that's the Instant Pot. Turkey pairs well with this handy gadget. A number of products, including boneless or bone-in turkey breasts, turkey wings and ground turkey, all work well in the Instant Pot, and cooking under pressure keeps them tender and moist.

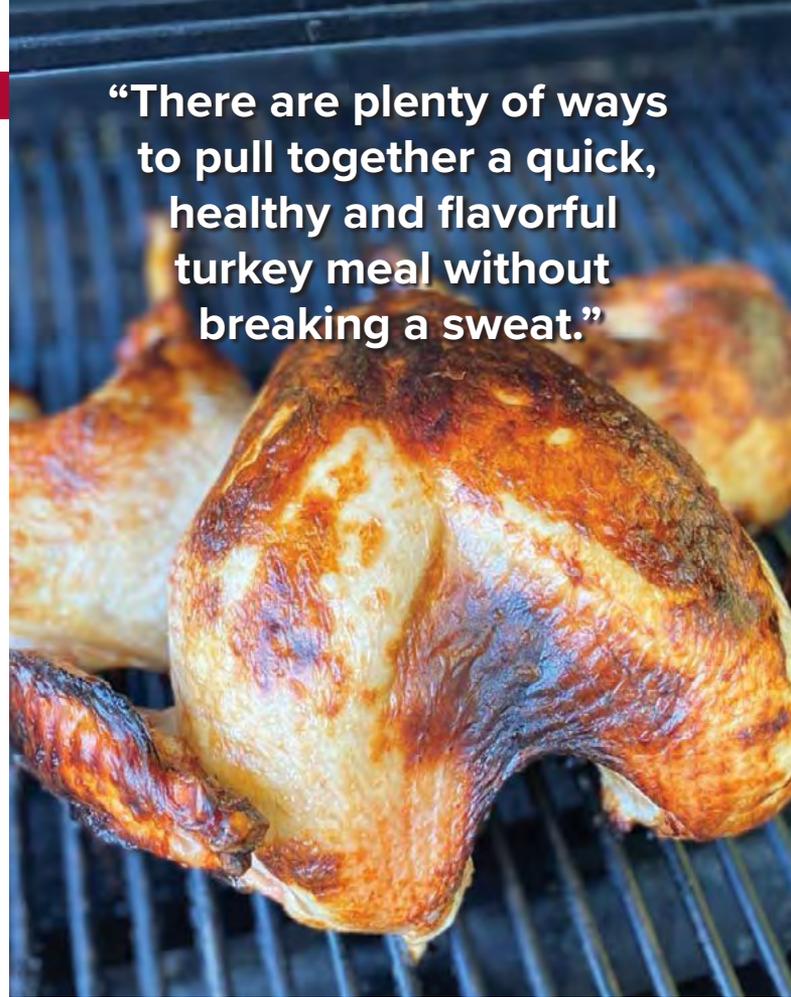
At NTF, we have a few turkey meal ideas that are bound to be *instant* favorites. Home cooks pressed for time can stir up a quick pot of spicy turkey chili. Or use the Instant Pot to test out a new twist on America's bird with a turkey pad thai. A bone-in turkey breast makes for a quick, hearty dish and is also the perfect way to prepare a smaller holiday meal (with plenty of leftovers). Cooks can get creative by adding their own flavor profiles to the turkey breast while letting the Instant Pot do all of the hard work.

WHOLE BIRD, WHOLE WEEK

For the millions of families who are fans of weekly meal prep, turkey is a healthy, cost-effective option. Preparing a whole turkey doesn't have to be just a holiday tradition. It's easy enough to do any time throughout the year. Roast, smoke, grill or fry a whole turkey over the weekend, and you'll have the base to whip up meals for days. White and dark turkey meat can be used in several different recipes to keep consumers from getting that leftovers fatigue, but still allowing for a quick prep time before dinner. The options are endless, but turkey tortellini soup for lunch and smoked turkey quesadillas for dinner sounds like a great plan.

Engaging more consumers is all about shaking up the perception of turkey. As we head into 2020, you'll see more from NTF as we work with our members and partners to shine a light on turkey's versatility and amp up the convenience factor. But don't just take our word for it, bust out that Instant Pot hiding in your closet and try turkey. Make sure to follow NTF at @ServeTurkey to get quick, creative recipes to get you started. For consumers looking for convenient, tasty meals, turkey is a winner.

No gobbling about it. [UB](#)



Photos provided by National Turkey Federation

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Brexit uncertainty: A shadow over agri-trade

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Deal or no deal, a lack of political consensus continues to prolong the polarized Brexit dispute.

A tug of war between those in favor of an exit and those who wish to remain within the single market regime has showed little sign of easing. More than three years since the United Kingdom voted to leave the European Union the “divorce” process remains in limbo.

WHAT NEXT?

Despite Boris Johnson’s exit attempts, the UK’s membership was yet again extended until January 31, 2020.

Much of what happens next will be determined by a snap election set for December 12, 2019. Provided there are no more delays, the UK exits the EU with or without a deal one month into the new year, with a transition period up until December 2020. However, according to the Withdrawal Agreement Bill, the transition can be extended once by up to two years if the UK and EU jointly decide to do so before July 2020.

Adding to the perplexity, there is also the prospect of a second referendum—albeit slim—with many Remainers arguing that the electorate should have a second chance to vote now that a draft agreement is on the table.

FUTURE TRADE

What mainland Europe consumes and produces has a profound impact on the British economy. Under the existing tariff arrangement, the EU accounted for 46% of all UK exports and 54% of imports in 2018 alone.

Forecasting the food protein landscape years from now is a difficult task, though a few scenarios can be mapped out.

NO DEAL

In a no-deal scenario the UK will automatically abide by World Trade Organization (WTO) schedules. Under the WTO’s “most favored nation” rules, the UK can only lower tariffs for a specific country under a trade deal, without one all members are treated as equal. As such, if the UK government decided to drop EU food tariffs to keep costs low, it would need to adopt the same tariffs for all 163 WTO members.

Products currently sourced almost entirely tariff-free from the EU—such as beef, pork, and cheddar—would all be subject to new tariffs.

With the second largest dairy trade deficit in the world, the UK imports 16% of its dairy consumption, 98% of which is from the EU. Meanwhile, 91% of UK dairy exports end up in the EU. Without a deal agreement the EU would impose its common external tariffs to UK exports, with butter and cheddar expected to pay a tariff of €1,896 and €1,671 per ton, respectively.

According to statistics from the National Sheep Association, the UK exports 35% of its sheep, 95% of which ends up in the EU. Under the EU’s common external tariffs beef and sheep meat will each pay 12.8%, plus an additional tariff which would add approximately 50% or more to the value of imports. While prices for cattle and beef are likely to rise with the adoption of new tariffs, consumption would likely drop shortly after.

Several farming unions and associations have voiced fears that a no deal scenario could jeopardise exports and undermine domestic markets. Market analysts have warned that the exportation of beef, lamb and dairy from Northern Ireland originally headed to the Republic of Ireland for processing would remain within the UK, leading to a surplus of product and depressed prices.

Aside from a range of new duties and the risk of depressed prices, UK agri-exporters would need to meet a range of new product standards, including sanitary checks and safety regulations, which will all come at an additional cost.

To ease the transition, the UK government has announced a temporary schedule of 12 months—in the event of a no deal—with 87% of imports (by value) to be tariff-free, compared to the current 80%.



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FISH

Access to UK waters has long served as a focal point in the Brexit debate. As it stands, the UK is part of the EU's Common Fisheries Policy (CFP), which gives all European fishing fleets equal access to EU waters.

Under a no deal scenario, the UK would introduce its own Exclusive Economic Zone (EEZ) of 200 nautical miles—abandoning the CFP in the process—giving the UK full sovereignty over its waters, whereby the Royal Navy would be responsible for monitoring activity.

Fish tariffs on exports to, and imports from, the EU would impact consumers on both sides of the channel. Several new procedures will also be adopted which will come at a cost. A catch certificate, storage document and processing statement will be required to trade fish between the EU and UK, which will indicate the country where the fishing vessel is registered as well as when, where, and how much fish was caught, as well as where the fish has been stored and processed.

While Brexiteers argue in favor of taking back control of British waters, there will be domestic fleets that lose out in the event of a no deal. According to recent estimates the UK exports 80% of its catch to the EU while 70% of fish consumed in the UK is imported. British shellfish sales to the EU alone are worth around £430m per annum, accounting for almost a third of all UK fish exports by value. Disruptions to these channels could have a lasting impact on fisheries.

DRAFT DEAL

In October, a draft Withdrawal Agreement—with a free trade agreement at its core—and Political Declaration was reached between the UK and lawmakers in Brussels. While the draft agreement has reduced the likelihood of a no-deal Brexit, the upcoming snap election has added another layer of uncertainty.

At the time of this writing, the draft Brexit paper had been agreed by EU leaders, though was yet to be ratified by both the UK and European parliaments.

Following the announcement of the draft agreement, a joint statement from the Presidents of the four UK farming unions was released: "The default of trading with the EU under WTO rules alone is unacceptable and would decimate our industry... The draft Brexit Withdrawal Agreement, while not perfect, will ensure that there are no hard barriers on the day we leave the European Union, and will allow trade in agricultural goods and UK food and drink to continue throughout the transition period largely as before. This opportunity needs to be taken."

Addressing one of the more complex issues, measures have been taken to provide clarity over hard border concerns. Under the draft agreement Northern Ireland will remain part of the customs territory of the UK. The draft also notes that trade between Northern Ireland and the Republic of Ireland will be governed by EU's Union Customs Code (customs rules) with no tariffs or restrictions.

DISRUPTION

Disruption across supply chains has already begun, as procurement teams continue to remodel supply networks to mitigate the potential implications of a withdrawal from the Union.

What measures will be taken to ensure that the UK's high standards of production are not undermined by any future trade policy? Only time will tell, though the outcome of the Brexit conundrum will play a leading role in shaping future trade dynamics.

Deal or no deal, the UK is set to inherit a wealth of challenges and a mixture of new opportunities if it manages to break free from the shackles of Brussels. [UB](#)

Article contributed by **Michael Nesbitt**
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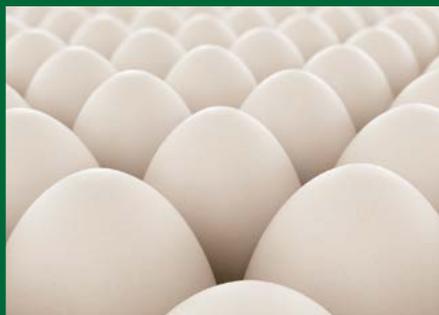


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Chinese catfish stays domestic due to African Swine Fever



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According to an analysis piece from Urner Barry's Pork Market Reporter, Russell Barton, the U.S. exported more pork to China than Japan in July 2019, for the first time in history.

China essentially consumes more pork than every other country combined. The impact on global pork and subsequent center-of-the-plate protein trade could be substantial as they try to fill the gap left by African swine fever (ASF).

The seafood industry is seeing the effects that ASF has left on China's protein supply. With less pork to consume, China is turning to seafood as a replacement protein. The pressure from imposed tariffs and the increase in domestic consumption has led to the decline of imports of Chinese catfish into the United States.

CHINESE CATFISH

Pricing has been gradually firming on Chinese catfish frozen fillets since the second quarter of 2019 due to imposed tariffs on the market. With the recent announcement of the 25% tariffs getting increased to 30% in October, another jump in price was noted.

With prices continuing to firm, shipments are reportedly delayed and inventory levels in the U.S. remain low. Domestic consumption within China of this species is climbing due to ASF affecting their pork production, with catfish emerging as one of the key protein substitutions.

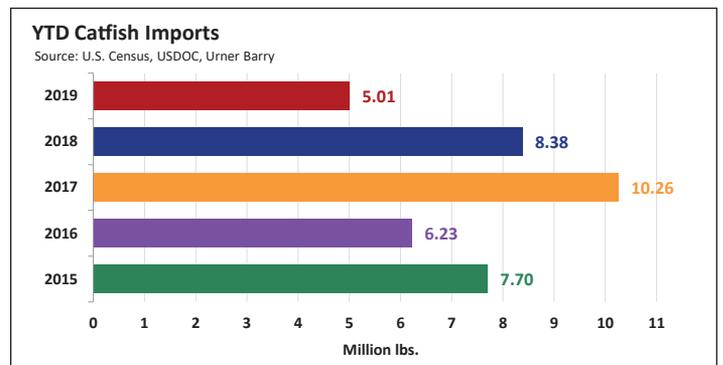
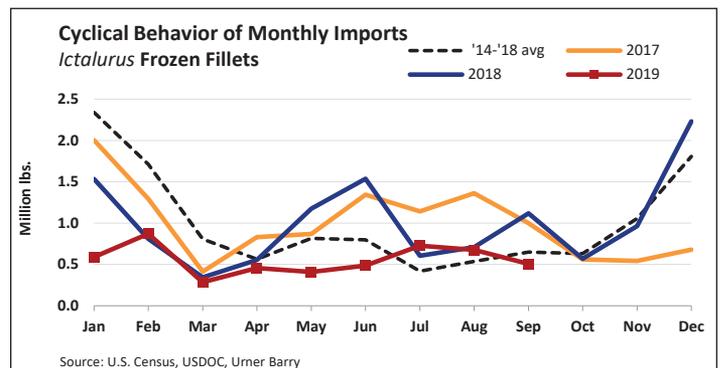
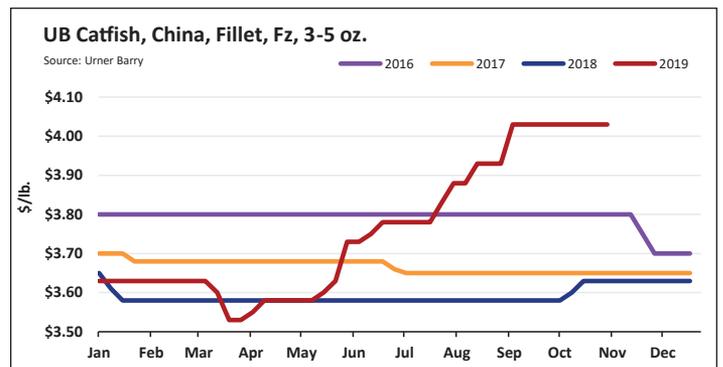
In looking at import data into the United States, 2019 volume for Chinese catfish frozen fillets have been trending well below the previous five-year average, with July import volume being the first month to break that trend.

On a year-to-date basis, 2019 import volume totals 5.01 million pounds for January through September, 40% below the same 2018 timeframe and 42% below the previous five-year average of 8.6 million pounds.

The market supply is barely adequate and with many companies preparing and planning for the coming Chinese New Year and Lenten season, industry players are on their toes anticipating how 2019 Q4 and Q1 of 2020 will pan out. [UB](#)

Article contributed by **Lorin Castiglione**
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“With less pork to consume, China is turning to seafood as a replacement protein.”



Shrimp Crab Meat Lobster Value-Added Finfish

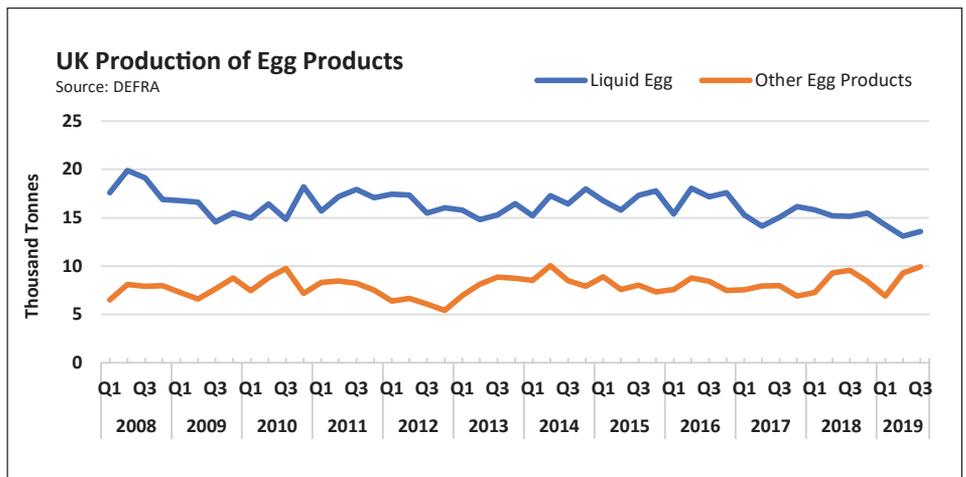
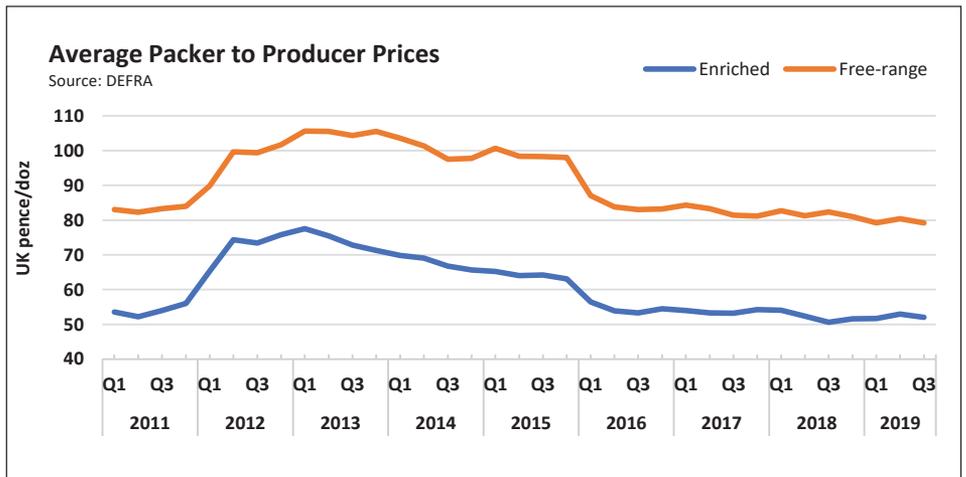
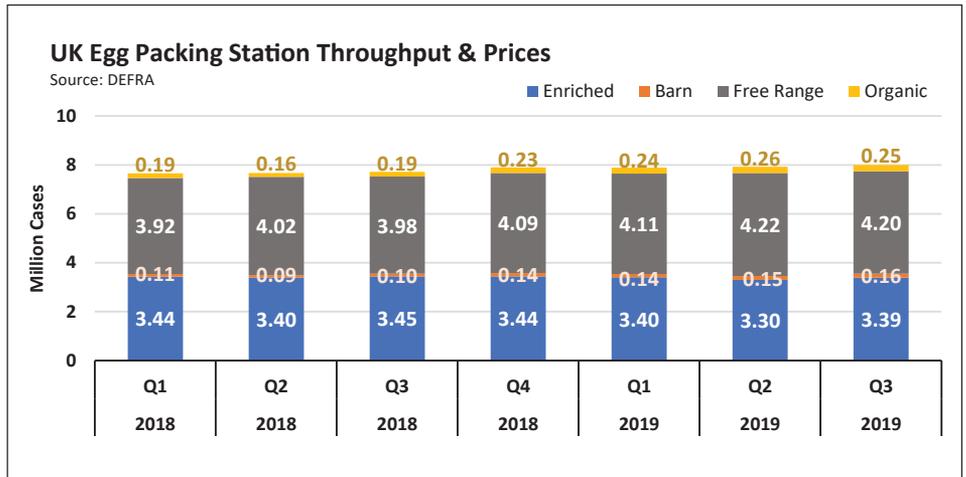


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UK egg production reaches all-time high

The UK's egg packing station throughput reached another all-time record during Q3 reaching 7,998 thousand cases of eggs, up 3.6% year-on-year, according to the Department for Environment, Food & Rural Affairs (DEFRA).

Most of that growth stemmed from packing stations in England and Wales, although Scotland and Northern Ireland stations were also up year-over-year. In addition, free range eggs represented 52% of all egg categories with enriched colony a close second at 42% of all eggs packed. The free-range share is unchanged from last year while enriched colony is down 2%, substituted mainly by packing of organic eggs.



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“The UK’s egg packing station throughput reached another all-time record during Q3.”

UK shell egg prices were down across all categories. Free-range prices were down 3.8% year-over-year at 79.2 pence/dozen, while enriched colony eggs were down 2.8% at 52 pence/dozen.

Meanwhile, production of egg products continued to struggle in the face of higher imports from continental Europe. Out of all eggs packed for the quarter, the share of eggs bought for processing fell

to an all-time low of 12.6%. Overall, the Q3 production of liquid egg products rebounded from Q2 totalling 13,576 tonnes. Liquid egg production is continuing to come down in the total share of egg products, with other products such as hard-boiled eggs increasing steadily. Non-liquid egg products were up 3.5% year-over-year compared with a decrease of 10% year-over-year for liquid eggs.

According to DEFRA, year to date imports of egg products reached 2,447 tonnes, which was down 7.6% year-over-year. There was a clear increase in imports in March due to stocking from the previous Brexit deadline, but this was followed by lower imports during the rest of the year. [UB](#)

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Ranchers rise to the challenge of 'ideal'

Article contributed by
Steve Suther, **Certified Angus Beef**

Beef cow herds change with each year's calf crop, bulls used, and replacement heifers kept, adapting with management decisions. So, when the first National Beef Quality Audit in 1991 found a quality shortfall, producers knew they could shift directions. It just took time for the market to incentivize it.

Certified Angus Beef® (CAB®) brand president, John Stika, recently addressed changes in the "ideal" across three decades.

In the early 1990s, "we were lucky to produce 2% Prime" when that audit called

for 7%, he said. That was a fantasy then, but it was no accident that led to a summer 2019 fed-cattle mix of 8.8% Prime and 72% Choice.

"We didn't get there by randomness," Stika said. No, it took "intentional responses" to consumer demand that filtered all the way back through feedyards to the cow-calf ranch.

That's how the CAB acceptance rate for Angus-influenced cattle doubled in little more than 10 years. Currently 35%, or 5.65 million finished animals, meet the brand's 10 science-based specifications and allow

some 19,000 global partners to market 1.25 billion pounds annually.

The market incentivized that over a number of years. Even through a "Great Recession" and widespread drought, starting 10 to 12 years ago and largely resolved by 2014, the brand saw record consumer demand at record prices.

"We learned that it's not just price that drives consumer purchasing decisions; it's price in relation to value," Stika said. "And that value is defined by the taste and the experience that our beef products provide to the consumer," who is the beef cattle community's "most sustainable source of revenue."

The world's leading brand of beef was created to be market driven, and that's exactly how it works in its 42nd year as ranchers read the market signals that called for more premium beef and less Select grade. A couple of years ago, the supply of CAB product surpassed that of Select and the trends remain intact, Stika noted.

"The reason we reached this level of production is because our packer partners sent economic signals back into cow country," he said, "to the tune of \$1.4 million a week in the form of *Certified Angus Beef* premiums. The signals said to keep the supply coming."

Despite record levels of quality, Stika pointed out that in the two-thirds of Angus cattle that failed to qualify for the brand, 92.6% did not have enough marbling. That's relatively easy to add as herds change going forward—but has the trend line outpaced demand?



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“We can continue to put more marbling into these cattle and the market is still indicating that it’s willing to reward us,” he said. The mission for high quality beef is not over; there’s still a lot more to do. Moreover, based on some record-high grid premiums paid for CAB Prime in recent months, the rewards remain strong.

“Maximizing what we have in our herds and feedyards today means managing health, nutrition, and care so that genetic potential for quality can be more fully realized,” Stika said. “Data tells us animals that have a bad day with regard to health or nutrition have almost no chance of reaching the CAB or Prime end point.”

Looking forward, Angus genetic trends for beef quality and value assure producers that their efforts in providing the best of care will mean more premiums for more of the best beef as the consumer ideal advances. [UB](#)

Photo provided by Certified Angus Beef®

“We learned that it’s not just price that drives consumer purchasing decisions; it’s price in relation to value.”



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From fast food to Halal, Mennella's poultry does it all

Entering its 75th year in business, Mennella's Poultry is a third-generation meat distributor in Paterson, New Jersey. Back when all one could ever need was located on a single street, consumers would visit Mennella's to purchase a dozen eggs or poultry from their live chicken market. In 1964 the World's Fair came to New York, and Mennella's Poultry was hired by Chicken Delight to deliver products to the fair. The business was working around the clock, driving to Delaware and

Pennsylvania daily, picking up chickens and preparing them for the event. This gave Mennella's Poultry the opportunity to work with the fast food industry for the first time and led to wholesale delivery as well.

After working with Chicken Delight as their first major national brand, Mennella's Poultry expanded, and began working with Kentucky Fried Chicken, Church's Chicken, and Popeyes Louisiana Kitchen. Through a recent social media campaign

known as the chicken sandwich wars, all Popeyes restaurants across the country sold out of their chicken sandwich. Vincent Mennella described the sandwich shortage as a "total shock," as to how the sandwich volume took off. The business recently geared up to supply Popeyes locations in New Jersey, New York, Pennsylvania, Delaware, Maryland, and Virginia, as the chain announced the re-launch of its popular sandwich in early November.

In addition to supplying restaurants, Mennella's Poultry has a retail store that offers a wide range of unique ethnic meats, they also deliver to catering halls and provide meals to airlines. Recently, Mennella's Poultry began venturing into Halal. In 2016, Mennella's Poultry created Al-Aqsa, the company's own Halal brand. Vincent stated that, "The brand has seen major growth in the last three years, and business is booming." Al-Aqsa can be found in approximately eighty butcher markets in cities including Philadelphia and Brooklyn. On top of these diverse markets, Mennella's Poultry opened a USDA facility in January of 2016. There were only five members when the room opened, and there are currently sixty. Processing 250,000 pounds of product weekly, Vincent added that the creation of the USDA facility allowed the business to focus on the center of the plate and supply additional products to customers.

Mennella's Poultry is truly a one-stop shop, and the team works diligently to ensure a positive experience for their customers. Shipping an average of 1.5 million pounds of meat per week, Vincent is proud of the business' growth when reflecting on the beginnings of the live poultry market on 21st Avenue in Paterson. While Mennella's Poultry is not open to the public 24/7, workers begin arriving at midnight to prepare orders, and you can find Vinny along with his partners there every morning at 4:00, eager to serve those that choose Mennella's Poultry for all of their protein needs. [UB](#)

Article contributed by **Andraia Torsiello**
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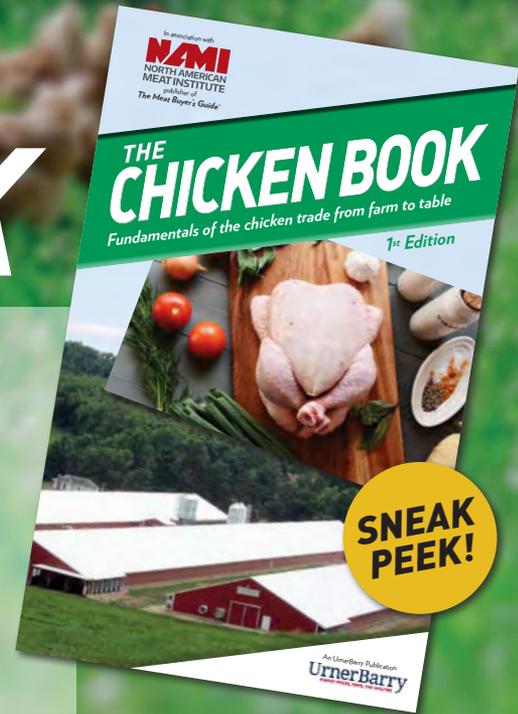
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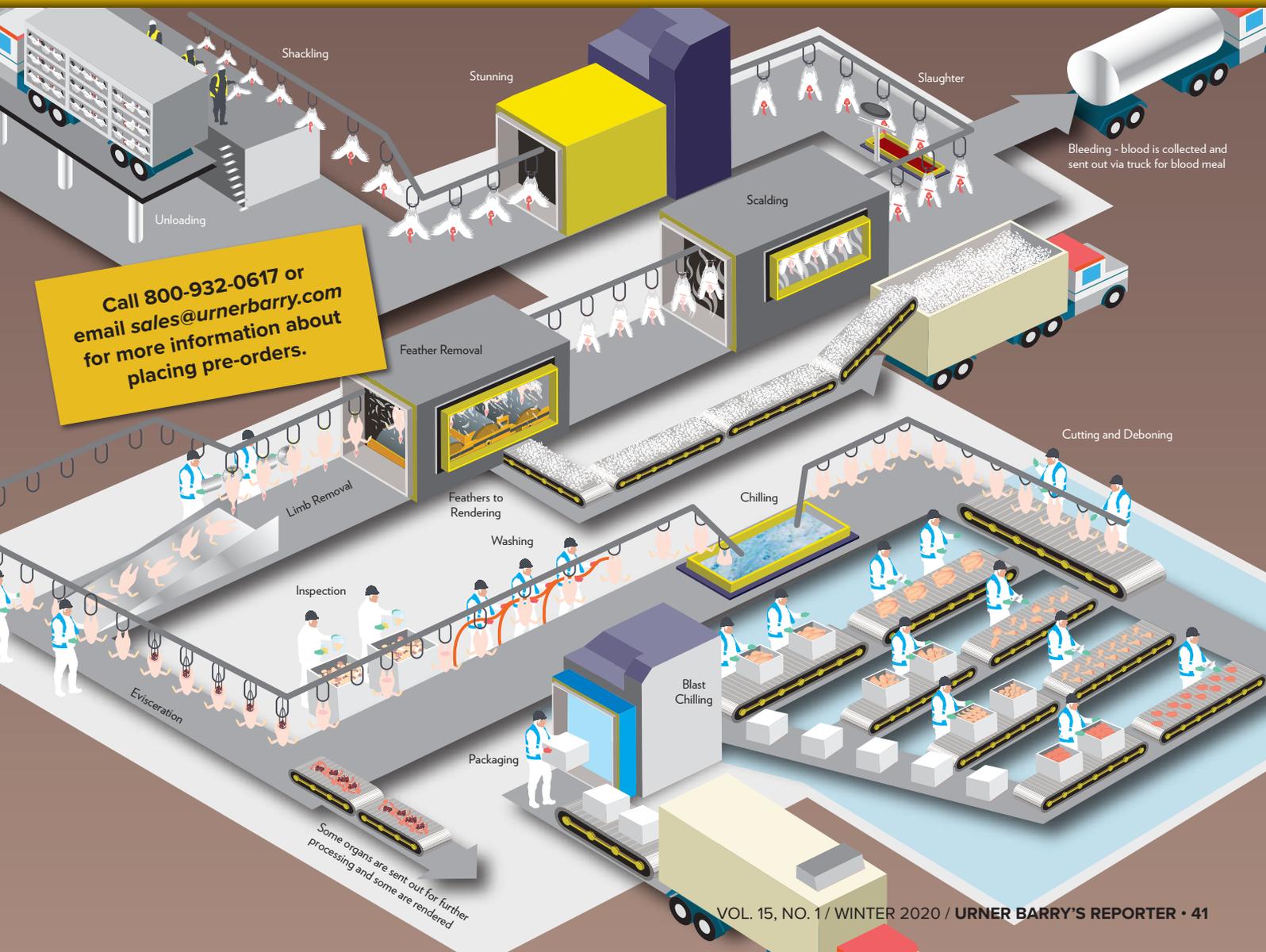
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CHICKEN PROCESSING: INSIDE THE PACKING PLANT



Best Aquaculture Practices gets a fresh new look

Aquaculture certification program Best Aquaculture Practices (BAP) recently underwent a facelift, rebranding with a fresh new logo for the first time since its inception in 2002.

BAP falls under the umbrella of Global Aquaculture Alliance (GAA), a trade association that strives to promote responsible aquaculture practices. GAA underwent a rebrand back in 2016, and it was time for GAA's certification body to follow suit.

GAA's Communications Director Steve Hedlund said that in order for BAP to become a recognizable eco-friendly label, they needed to consider best practices in logo design. With an identifiable logo, BAP

could become not only more noticeable in the seafood industry, but it would also be easier for consumers to spot at the grocery store.

"It was a long time coming and we got a lot of good feedback so far from our partners up and down the supply chain," Hedlund said.

Early in the rollout process, BAP is seeing strong results. Hedlund admitted that when the rebranding was announced, he faced a lot of questions. BAP's work answered most of those questions thus far as stakeholders have been pleased with the new logo and how consumer friendly it is.



Best Aquaculture Practices

Above: BAP's new logo
Right: previous version



The new logo rollout, which includes a number of variations, began in October. BAP has various packaging logos that break down the certification status of the specific products.

The difference between the previous BAP logo and the current one is night and day. It is easy to read, and the new logo has a clear purpose.

"If you look at the old logo, it's circular and the words 'best aquaculture practices' is difficult to read," Hedlund said. "When we redesigned the logo, we had to make the term easier to read."

Diving deeper into the logo's anatomy, the fish is facing the name and moving forward, symbolizing how the company is looking to move the industry forward. The fish even has a hidden checkmark, signifying the certification standards. And finally, the fish has a very discernible eye, showing that the association is keeping an eye on what looks to be a bright future.

BAP is working hard to grow. Their recent rebrand is another way to show consumers that aquaculture is a sustainable practice. As sustainability continues to be an important issue for consumers, seeing products that are third-party certified gives consumers peace of mind. [UB](#)

Article contributed by Ryan Doyle
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UB heads to India for GOAL Conference

This past October the Global Aquaculture Alliance hosted its Global Outlook for Aquaculture Leadership (GOAL) Conference in Chennai, India, for industry stakeholders across global aquaculture.

Urner Barry's COO and seafood market reporter Jim Kenny took the trip to GOAL and had plenty of takeaways from the event.

"This year's GOAL Conference was highly anticipated given its location in India," he said. "It was well attended, and the support of the Indian aquaculture industry was clearly evident. The program was informative, and the gala was the best one yet."

For the 13th consecutive year, James Anderson, Director at the Institute for Sustainable Food Systems, and professor of food and resource economics at the University of Florida, presented data on global farmed shrimp production. Anderson noted the strong growth from Ecuador of late at a CAGR of 13% from 2013-2021.

Anderson broke down U.S. shrimp imports, which were up 39% from 2013-2019. Imports from Thailand had a steep decline of 79% from 2010-2019, as India and Indonesia have become the top exports to the United States. Both countries have accounted for 58% of imports in 2019. India's exports have increased at a CAGR of 30% between 2008 and 2019.

When it came to Chinese shrimp imports, numbers jump significantly over the past two years, 114% in 2018, and 150% in 2019. Imports came largely from Ecuador and India.

Kenny noted the buzz around keynote speaker Ramana Laxminarayan's address "Antibiotic Use in Aquaculture and Antimicrobial Resistance in Humans."

Laxminarayan highlighted the use of antibiotics in aquaculture and the potential



impact it can have on humans. He believes this will be a growing concern for the industry as antibiotic-resistant bacteria can lead to serious health issues. He highlighted previous cases in which food handlers have fallen ill and consumers who have been contaminated with a food-borne disease linked to seafood.

Another presentation that was making waves at GOAL was Syed Mahmudul Huq's breakdown of the potential growth of black tiger shrimp. Huq, the Chairman of Bangladesh Shrimp and Fish Foundation, pointed out the importance of keeping the black tiger population healthy. The species is key for biodiversity in the Sundarbans of Bangladesh, home to the largest mangrove forest in the world. Black tiger shrimp are also keeping countless farmers in business.

Huq discussed the benefits of promoting the species as a top brand and how creating a market for it will help both producers and consumers looking for a quality product.

As he looks toward the future of black tiger shrimp, Huq urged black tiger producing countries to collaborate and develop a strategy for technology and production innovations. He also pushed for engagement with retailers, importers, exporters, and policy makers to support the market for the species.

To keep the entire black tiger industry in the loop, he also highlighted the importance of a network arrangement which will allow for a free flow of information. [UB](#)

Article contributed by Ryan Doyle
rdoyle@urnerbarry.com



Urner Barry COO and seafood market reporter Jim Kenny in Chennai, India, at GAA's 2019 GOAL Conference.

CHANGE OF TEMPERATURE LOSSES?



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2019 snapshot of beef varieties

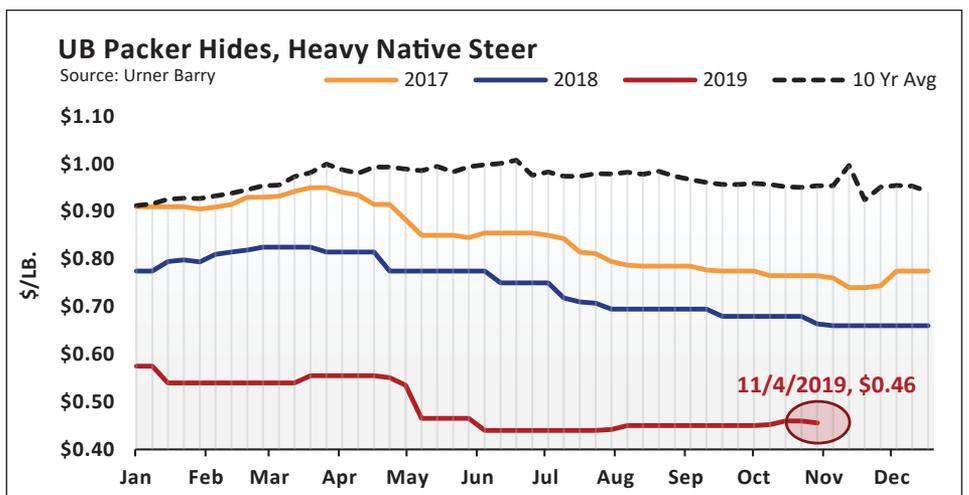
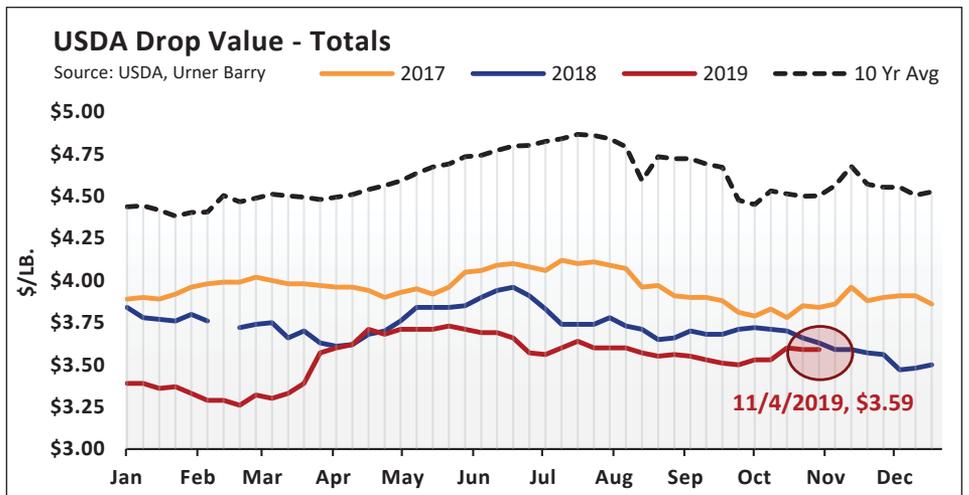
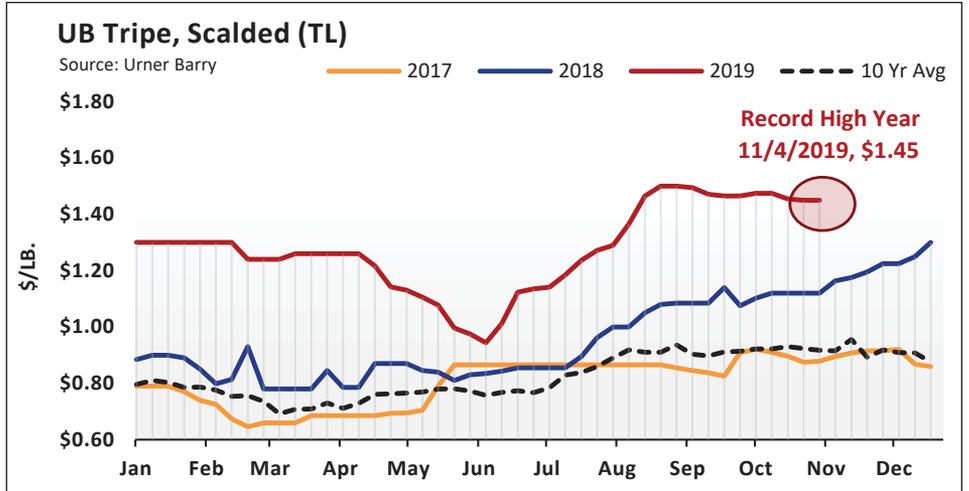
“The standout item this year became scalded tripe, which reached record quote levels since Urner Barry first began reporting it in 1990.”

The arrival of summer weather was somewhat delayed in 2019—disappointing news for some but supportive conditions for the beef varieties market. Beef varieties trend during the cold months—and this year’s rain and storms kept varieties supported longer than seasonally expected throughout the year. Other contributing factors included the export demand from Asia and Mexico along with the shortage in lean meat.

The standout item this year became scalded tripe, which reached record quote levels since Urner Barry first began reporting it in 1990. Currently the quote sits at \$1.45/lb., a 29% increase over last year, and 58% above the 10-year average. Compared to when Urner Barry first started reporting a quote for scalded tripe, the current quote is 417.9% higher.

With varieties remaining stable to firm this year, one would expect to see drop value higher. However, drop value is lower than the past two years, and down 20% from the 10-year average. Hides, among the top contributing item to drop value, are at record low numbers. As the winter months begin, continued and increased support for beef varieties is expected for the remainder of the year. [UB](#)

Article contributed by [Jocelyn Garcia Rojas](#)
jgarcia Rojas@urnerbarry.com



From the
recipe box



Menudo, referred to also as "pancita," is a Mexican soup prepared with beef tripe. This traditional dish is very important in Mexican cuisine.

Ingredients

- 4 lbs. scalded tripe ("Menudo"), cut into medium sized chunks and rinsed *pictured on previous page*
- 1 beef foot, cut into pieces and rinsed
- ½ onion, chopped
- 2 garlic bulbs, separated into cloves (reserve 2 cloves for later step)

- 2 bay leaves
- Oregano
- Salt
- 2 small cans of white hominy
- 10 guajillo peppers, seeds removed and rinsed



Directions

1. Place menudo and beef feet in a large stew pot with one gallon of water.
2. Add chopped onion, garlic, bay leaves, salt, and oregano.
3. Bring pot to a boil, cover and cook over low heat for 12 hours.
Patience is key and the secret to a delicious menudo.
4. After 12 hours, remove 4 cups of broth and place into a second pot. Add white hominy to second pot, bring to a boil and cook for 20 minutes.
5. In a blender, mix the peppers, one cup of water, and two reserved garlic cloves until liquified.
6. Strain the pepper mixture into the hominy stew.
7. Remove the menudo and beef foot cooked parts from the original pot and place into the hominy stew. Leave broth in pot.
8. Remove any excess fat from original pot with cooked broth.
9. Add broth to hominy stew to combine and boil for 10 minutes.
10. Menudo is now ready to eat. Enjoy with optional toppings below.

Optional recommended toppings for additional flavor:



- Lime
- Cilantro
- Oregano
- Black Pepper
- Chopped Cabbage
- Sliced Radish
- Extra Hot Sauce

Recipe contributed by Jocelyn Garcia Rojas
jgarciarojas@urnerbarry.com

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Nourishing our future— AEB's Eggs in Schools Program



Article contributed
by Anne L. Alonzo,
President & CEO
The American
Egg Board

As the marketing organization for the U.S. egg industry, entrusted with increasing demand for U.S. eggs and egg products, the American Egg Board (AEB) always has its eye on the future growth of the egg sector. One important and growing area where AEB has been especially focused on making inroads—with both immediate and longer-term benefits—is in schools. We're focusing on adults who make or influence decisions about what children eat. Specifically, the AEB has been targeting the K-12 school nutrition programs and the foodservice professionals that run them. The opportunity to increase egg consumption in schools is significant. Each year, approximately 2.4 billion breakfasts and five billion lunches are served through the National School Lunch Program and School Breakfast Program, administered by the USDA.

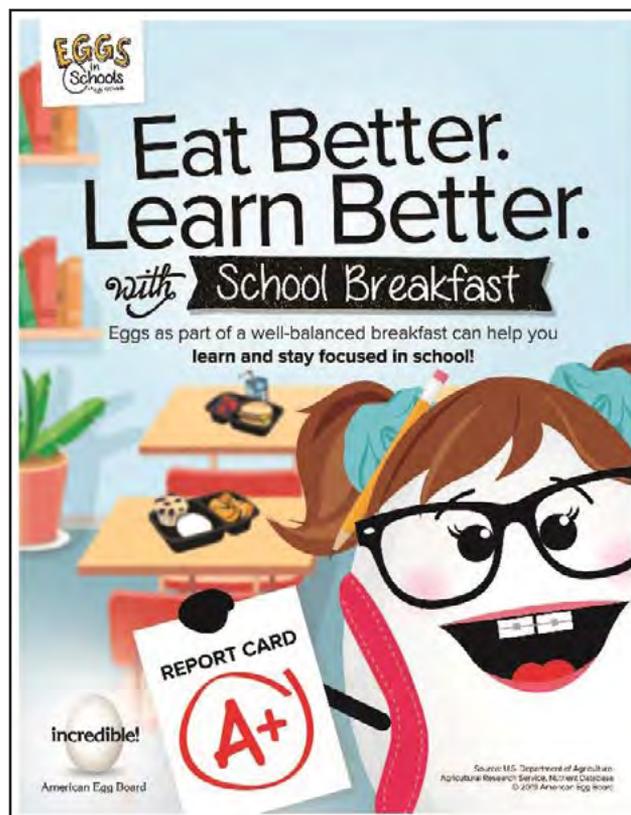
Most importantly—and perhaps more than any other program AEB is advancing—our Eggs in Schools Program is, arguably, one of our most fulfilling and personally satisfying endeavors. Through our efforts,

we're working to nourish and feed our youth—our future—with high-quality egg products.

How does it work? The AEB has identified the top 20 school districts, by enrollment, nationally, and I'm delighted to report that for the 2018-2019 school year, increases in egg consumption were up by 3.6 percent due to the focus on foodservice distributors and an additional 9.5 percent by USDA purchases, resulting in more than 350 million egg servings in schools across

EAT BETTER. LEARN BETTER.

"Eat Better. Learn Better." derives from research showing that students who routinely eat breakfast perform better in school. To engage school nutrition directors and encourage usage of eggs on school menus, the program capitalizes on the egg's versatility through an Eggcellence in School Menu Innovation contest—with a chance to have their district recognized and celebrated at a special event.



A pilot last year, in which large school districts submitted egg-centric school menu items, yielded an additional 1.2 million servings of eggs, culminating with the inaugural "Eat Better. Learn Better." celebration at Charleston County School District.

This year, the Des Moines Public Schools Food & Nutrition Program was selected from 35 applicants. The district, comprised of 33,000 students across 63 schools, serves approximately 36,000 meals a day. The two-day event—in partnership with the Iowa Egg Council—included a day of training for the district's 300-plus school nutrition professionals

on the value of protein, understanding changing school meals and social media best practices to increase meal participation. We even attracted Iowa Governor Kim Reynolds and Iowa Deputy Secretary of Agriculture Julie Kenney to provide keynotes addressing the value of agriculture and nutrition in schools. The event generated considerable local media interest around eggs and school nutrition.

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5 DAYS/5 WAYS™

School nutrition directors are continually looking for meal ideas that increase meal participation at a low cost while maximizing inventory. The AEB's 5 Days/5 Ways™ program meets this need by providing real school recipes for each day of the week—helping menu planners minimize inventory costs while maximizing egg product use by serving them multiple ways across the menu cycle. The versatility of eggs allows operators to customize offerings while enticing students with new eggcellent entrees. The program has been hugely popular, with social media and downloads far exceeding our goals and benchmarks.

Most recently, to grow demand for eggs with the expansion of breakfast service models, the AEB has introduced a new series of 5 Days/5 Ways™ menus that can be used for Breakfast in the Classroom, All Day Breakfast and after-school snacks.

NEXT UP: SETTING SIGHTS ON LUNCH AND SNACKS

One of the keys to the success of the AEB's Eggs in Schools programming has been our ability to provide relevant, on-trend culinary and marketing support to school nutrition programs—featuring eggs—that meets their needs and also delights both students and parents. Now we're moving toward the opportunity to increase demand for eggs via lunch and snacks. With schools expanding breakfast beyond the cafeteria to alternate venues, the increase in demand for vegetarian options, the rising popularity of brunch for lunch and a bevy of other trends, eggs' versatility and affordability make it the perfect choice. We're proving that when it comes to nourishing America's youth, eggs truly are in a class of their own! [UB](#)



Pictured (from left): Iowa Egg Council Executive Director Kevin Stiles, Iowa Governor Kim Reynolds, AEB mascot STEM Shelly, Iowa Deputy Secretary of Agriculture Julie Kenney, Des Moines Public Schools Director of Food and Nutrition Amanda Miller, AEB SVP Market Development John Howeth, AEB Member and Chairman Emeritus Blair Van Zetten, President of Oskaloosa Food Products, and AEB School & College Marketing Manager Maribel Alchin.



Photos courtesy of American Egg Board



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MLMC provides a look into Maine's staple industry on *National Lobster Day*

What do you associate with different states? When imagining New York, do you think skyscrapers? How about Florida and sunshine? Well, how about the state of Maine? Odds are you will start thinking about a lobster dinner.

The lobster fishery in Maine provides more than \$1 billion to the state's economy and continues to be an industry that thousands of Mainers rely on.

To celebrate National Lobster Day, the Maine Lobster Marketing Collaborative (MLMC) showed off the impressive Maine lobster industry.

A DAY ON THE BOAT

To kick off the festivities, the MLMC provided just a tiny taste of life as a lobsterman with the help of Lucky Catch Tours. Lucky Catch provides a look into the daily routine of Maine lobstermen. Captain Dave Laliberte and Jessica Penny led the trip and displayed all the steps necessary to catch lobster.

One thing was clear: Maine lobstermen are serious about sustainability. They understand their livelihoods depend upon the health of the lobster fishery. It was apparent that throughout the industry, from boat to processing facility, everyone is



aware that they must work to protect the fish that has given them so much.

The lobstermen take several steps to ensure the species is in good shape.

They notch the tails of breeding females, which protects her from being harvested. They also implement minimum and maximum size limits and only use traps to collect lobster.

The tour focused on a typical day for Maine lobstermen. Although it was just a sliver into what the long days on the water are like, it was chock full of useful information.

HOW LOBSTERS MAKE THEIR WAY AROUND THE WORLD

As travels through the lobster industry continued, Maine Coast Shellfish provided an insightful tour of their facilities in York, Maine.

President Tom Adams, alongside his wife Sheila Adams, VP of Sales and Marketing, led the tour of the facilities, which recently achieved certification under Safe Quality Food (SQF) Food Safety Code for Manufacturing.

Maine Coast is one of the premiere success stories of lobster distributors. Known for its Lively Lobster™, the tour showed exactly how lobsters are shipped around the globe.

The Adams' showed off the company's packing methods and traceability measures to ensure product quality as well.

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Lobsters arrive the same day they are caught and delivered right to Maine Coast's facility where they will be held in conditions that mirror their conditions in the wild. The care taken to ensure the lobsters are in a comfortable condition allows them to thrive while in transit. Whether it be a short ride down to Boston or a flight to Las Vegas, Maine Coast wants to ensure that every customer receives lobsters that are teeming with life.

Maine Coast was sold to Premium Brands Holdings Corporation, a Canadian-based company that owns specialty food distribution businesses like Maine Coast.

PROCESSING ASPECT

The final stop on the tour of Maine lobster was at Luke's Lobster Seafood Company. The journey for Luke's Lobster began in New York when the company's founder and CEO Luke Holden was craving a Maine-style lobster roll in New York City.

Holden leaped and has landed with a successful restaurant business. With all that success, Luke's Lobster decided to vertically integrate and build a processing facility which allows the company to not only provide lobster to its restaurants, but to follow the company's lobster from trap to table.

A tour around the processing facility showed exactly how processed lobster, like tails and the meat found in a tasty lobster roll is prepared.

Ben Conniff, co-founder and CMO, and Ben McKinney, VP of Operations of Luke's Lobster Seafood Company, led the processing tour. The duo broke down every aspect of processing to ensure that customers receive the best quality product from New York to Japan.

LOBSTER, LOBSTER, AND MORE LOBSTER

The MLMC wanted to showcase some of the top restaurants in the state; especially those that feature popular lobster dishes.

The first meal was in the middle of Downtown Portland at Eventide Oyster Co., featuring an impressive line of small



plates featuring several seafood dishes. The menu is highlighted by the Brown Butter Lobster Roll, a twist on the traditional lobster rolls Mainers are accustomed to.



CLAM SHACK

The next day, a trip to Kennebunkport, Maine meant it was time to visit The Clam Shack, home to its famous lobster roll dish. Owner Steve Kingston nicknamed, "The King of the Lobster Roll," went through every step of his process, describing how he creates one of the best lobster rolls in the state.

Kingston didn't forget to mention his personal delivery of his lobster rolls to George W. Bush and his family at their Kennebunkport compound.

Photo credit: MLMC

LUKE'S LOBSTER

The final stop on the trip was to Luke's Lobster Portland location where Ben Conniff was able to chat about the company he co-founded. Alongside the menu full of lobster and other seafood rolls, Conniff showed off the company's lobster buying station, which is right next door to the restaurant. [UB](#)

Article contributed by Ryan Doyle
rdoyle@urnerbarry.com

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Beyond the surface: Interview with Chuck Muth of



BEYOND MEAT®



It doesn't seem likely that a phone call could pull a person straight out of retirement. But in the case of Chuck Muth, that's exactly what happened. When the opportunity to spearhead the growth of publicly traded Beyond Meat came knocking—he answered. Chuck recently gave an interview for Urner Barry's Market Digest Podcast, and he had a lot to say about the whirlwind that he's experienced as the Chief Growth Officer of Beyond Meat and the brand's explosive expansion.

EARLY ADOPTION

Unlike its competitors, Beyond Meat had a unique shelf space in the supermarket early on—right at the meat counter. Drawing inspiration from dairy alternative shelf placement, the company envisioned its products truly providing visibility and variety for

consumers and insisted that grocers shared that goal. Chuck shared that Beyond Meat actually turned down retailers that would not put their plant-based products in the meat case up until recently, highlighting the overall importance of choice for shoppers. Today, Beyond Meat products can be found at virtually every retail grocer in the US.

DRAWING A CROWD

Product placement was always part of the larger mission for Beyond Meat. Chuck told the Market Digest, "You don't really change the world if you get vegetarians to eat less meat, you really get it when you get meat eaters to eat less meat." Research shows that the brand has done just that, "93% of consumers that buy (Beyond Meat) products also buy meat." That kind of ratio isn't bad for the man with the plan for growth either. "We have never targeted the vegan, vegetarian community...for us [meat-eaters are] a much bigger audience."

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KEEPING UP WITH DEMAND

From a growth standpoint, the kind of demand Beyond Meat is experiencing is tremendous; but the ingredient supply is another story entirely. “Demand has been astronomical. It’s been a challenge. There has historically not been a lot of pea protein isolate production facilities. There are plenty of peas—peas aren’t really the issue themselves, it’s really the processing of the peas. And furthermore, we make it even more difficult because we only use very high-quality peas; we don’t qualify every producer... We do have multiple sources right now in the US as well as internationally that we’re using for it, however, it is definitely not a robust supply chain at this point.” But the flexitarian frenzy can continue uninhibited, as Chuck assured that, “There are definitely investments coming in that space.”

CHUCK’S TAKE ON BENEFITS

Chuck was quick in his interview to list some of the many advantages of consumers choosing Beyond Meat products at least occasionally. He cited an independent, peer reviewed study from the University of Michigan on consumers who opted for a Beyond Burger over the more traditional 80/20 beef patty. The study found that those who chose the plant-based alternative required 99% less water, 46% less energy and used 93% less land. “From a health perspective there are some advantages, it has no cholesterol for instance. It has quite a bit less saturated fat. At Dunkin, our sausage it’s quite significant 50% less total fat, 44% less sat fat, 37% less sodium, so significantly better from that perspective.”

Many critics point out that plant-based meat alternatives are still not a great choice due to the amount of processing it takes to create the products. But when Chuck was asked about the amount of processing, he easily pointed to our toasters for comparison. “If you have avocado toast in the morning, that toast is processed.” Beyond Meat uses all plant-based ingredients and no chemicals whatsoever. “We could even argue that animals are processed the way they are fed hormones or antibiotics.”

QSRs AND BEYOND

Beyond Meat products are already available at some of the most recognizable quick service brands, including McDonalds, Subway, Dunkin, KFC, A&W Canada, Carl’s Jr, and Hardee’s. And the Chief Growth Officer could not be more passionate and involved in further expanding the brand and the mission. Chuck ended his interview with some insightful notes on the core of Beyond Meat and its hope for the future, “It’s about democratizing the brands. It’s about allowing it to be affordable and available to every consumer at every economic level... none of this is possible if it wasn’t consumer driven.” [UB](#)

Article contributed by **Laura Zinger**
lzinger@urnerbarry.com



Examples of some of the partnerships that Beyond Meat has with national QSRs. Images provided by Beyond Meat.

To listen to the full interview, find and subscribe to Urner Barry’s Weekly Market Digest on Spotify, Sound Cloud, or Apple Podcasts for free. You can also easily find links on COMTELL and FoodMarket.com by searching “podcast.”

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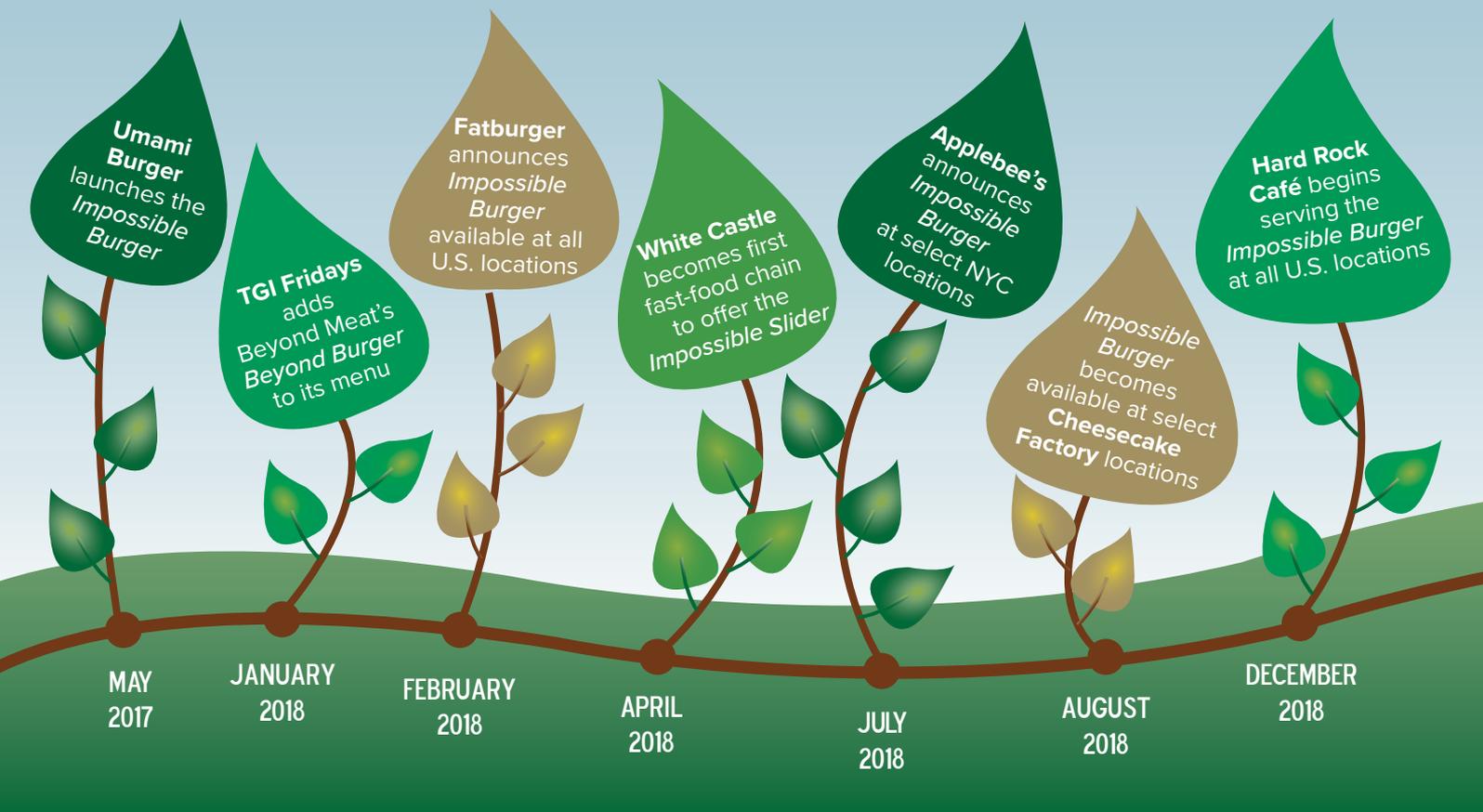
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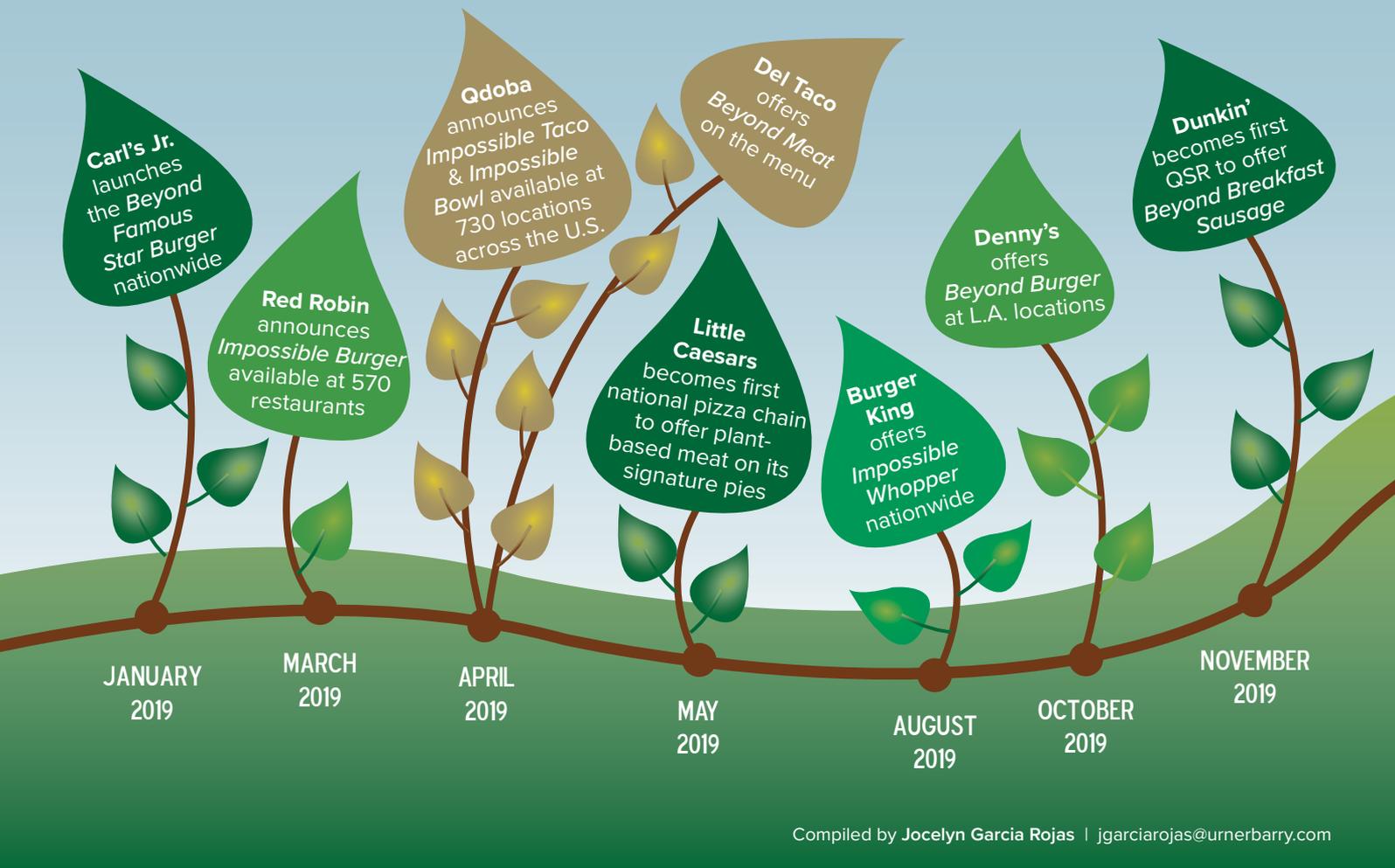
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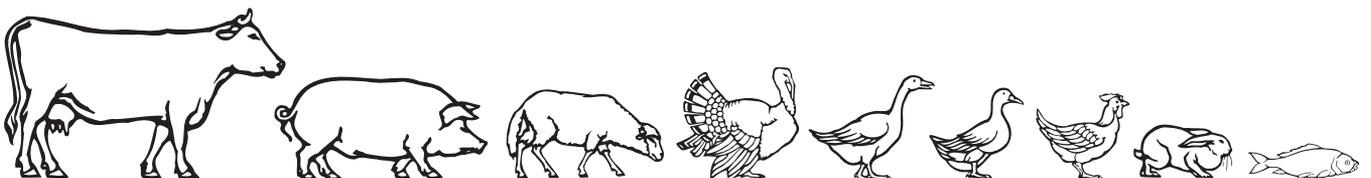
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BIODIVERSITY:

The key to feeding a growing population

A crisis threatening the stability of the global food supply and ecosystem is brewing all around us. In February 2019, the Food and Agriculture Organization (FAO) of the United Nations premiered “The State of the World’s Biodiversity for Food and Agriculture” report. It clocks in at 529 pages and is compiled of research from 91 countries, comprehensively covering a breathtaking scope of data. But why is it just premiering this year?

As the population grows, so does the need for food. About 6,000 plant species are grown for human consumption. However, about 50% of all farmland is occupied by wheat, corn, rice, and soy alone since the demand for them is the highest. This unbalanced crop monopoly greatly increases the risk of a disease epidemic decimating the global food arena due to the limited genetic lineage of the most widely planted crops. Today’s massive populous needs more than just a few species to rely on for

sustenance. Imagine a corn-wide blight; ethanol, feed, and other industries would be placed under tremendous stress to meet even bare minimum demand.

Looking below the literal surface reveals the invisibly incredible and integral world of dirt. Over exploitation of soil in developed areas through pollution, failure to rotate crops, or simply overharvesting wrecks microbiomes full of the vital fungi, bacteria, and insects that make for healthy plants, air, and critters.

Biodiversity is vital to our infrastructure in quiet but direct ways. Water, fuel, air filtration, and food sources are deeply intertwined with the health of the ecosystem. Commercial farming is necessary to support the planet but compromising critical environmental balance risks economic and political instability.

“...ethanol, feed, and other industries would be placed under tremendous stress to meet even bare minimum demand.”



Urbanization and soil depletion have a very immediate effect on biodiversity, but the demands the market places on producers play a part, as well. The requirements for product uniformity and supply continuity, in addition to the challenges presented by international trade restrictions, leave little room or appeal for more varieties of crops to get a root in the door with growers or buyers.

The FAO's report made a timely arrival. The agricultural sector can now educate themselves on the imminent threat we face, collaborate to find innovative solutions to maximize sustainability and diversity, and minimize ecopolitical or environmental damage. The situation may sound bleak, but experts are posing solutions to this crisis.

The wellness of the biosphere being a cornerstone in decision makers' minds during the execution of new developments can

negate some of the damage that's already been done. Economic reform with the goal of stimulating and rewarding sustainable behaviors while discouraging non-sustainable ones, on the consumer, agriculture, and production sides, will promote new habits that could save the world.

Now more than ever, addressing the biodiversity crisis is a necessary and long overdue step toward ensuring the security of agriculture and our posterity. [UB](#)

Article contributed by **Bridgette Hanson** | bhanson@urnerbarry.com

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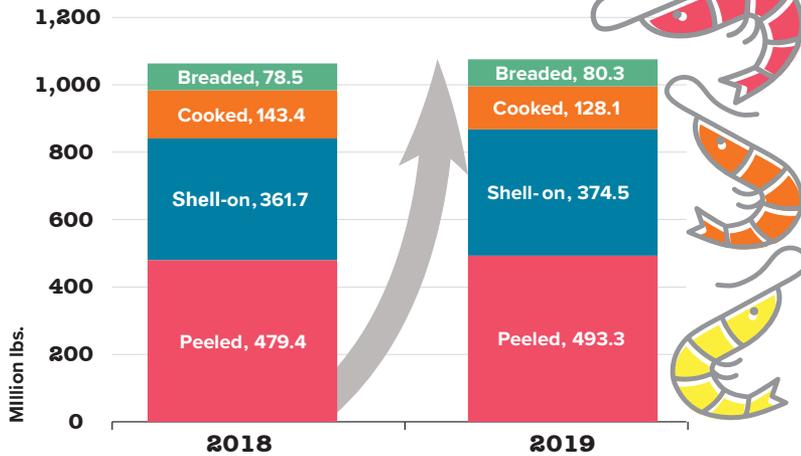


Compiled by Lorin Castiglione | lcastiglione@urnerbarr.com

NAPSHOT

YTD Shrimp Imports by Type Breakdown

Source: U.S. Census, Urner Barry, USDOC



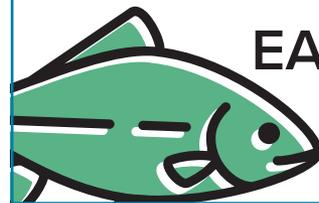
TUNA

main fishing season occurs in **FALL** with imports into U.S.

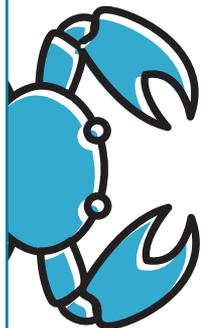
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Q1



LIVE CRAB DEMAND



in Asian markets



LESS IMPORTS

INTO THE U.S.



Q4 Chilean

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fall

amid protests in Chile



More than

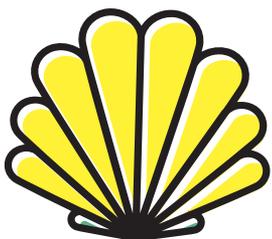
83%

LIVE LOBSTER EXPORTS

occur in 2nd half of the year



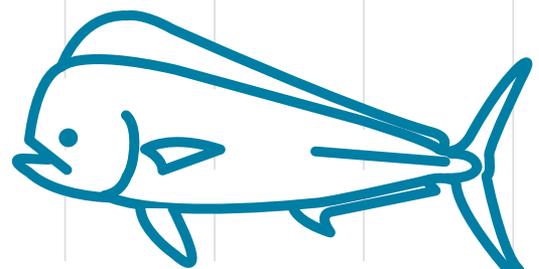
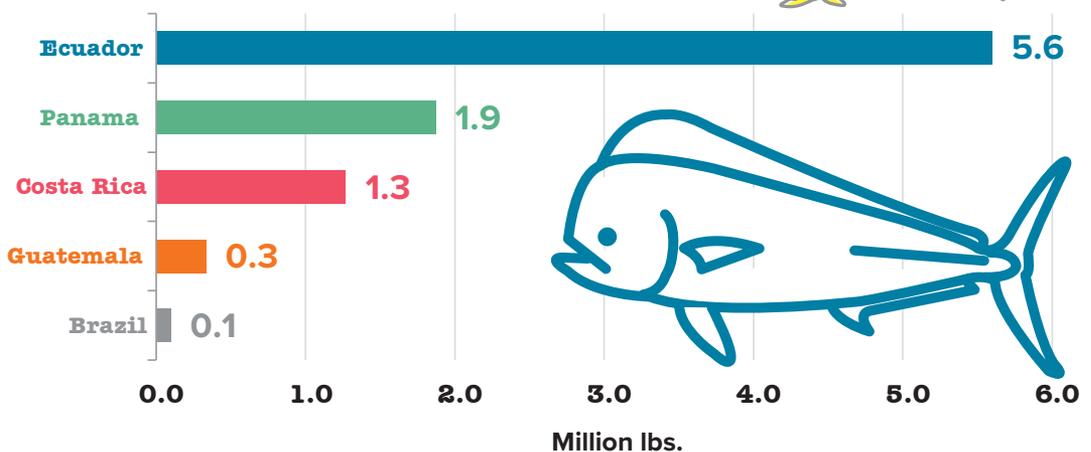
PRICES FOR China bay SCALLOPS on the rise



due to tariffs & labor costs

2019 Mahi Fillet Imports by Country

Source: USDOC, Urner Barry



MEET URNER BARRY EGG REPORTER *Karyn Rispoli*

Urner Barry's newest egg market reporter Karyn Rispoli joined the team in April 2019, bringing with her extensive market reporting knowledge.

Karyn stepped into her role at Urner Barry with the principles of market reporting down pat. Although she would dive into a new world of shell eggs and egg products, the concepts and applications of reporting transferred well to her role at UB.

When she first came across Urner Barry, she was pleasantly surprised to see an opportunity for a market reporter right in her backyard. After Karyn researched a little bit more about Urner Barry she was impressed with the reputation and the working environment. She felt it was time to throw her hat in the ring. Almost a year in at UB, Karyn is a critical piece of the benchmark quotations for the egg market.

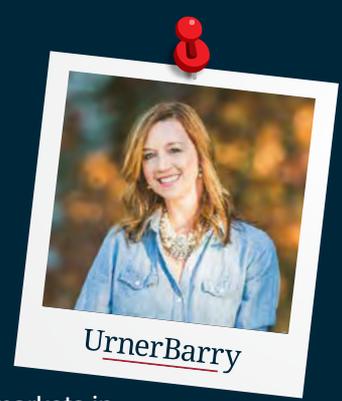
After graduating from Radford University with an English degree, Karyn kickstarted her career covering wholesale power markets as her first introduction to market reporting.

She then took a position with Bloomberg where she continued working as a power reporter, before transitioning to oil, gas and other fuels.

The next stop in her career took her back home to Monmouth County. After long commutes to Northern and Western New Jersey, she was able to report on markets in Monmouth County, leading up to her start at Urner Barry.

When she's not reporting, Karyn is working on one of her other passions, photography. In 2013, Karyn enrolled in a professional program where she received a photography certificate from Boston University's Center for Digital Imaging Arts. Karyn continues to put her artistic talents to use by taking family portraits and professional headshots in her spare time.

Karyn is a Jersey girl, through and through. She is a 7th generation New Jerseyan, and family documents show she is a direct descendent of relatives that not only fought in the Civil War but were enlisted right here in New Jersey! She has called Wall Township of Monmouth County home for most of her life, where she resides with her soon-to-be husband and two rescue dogs.



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FOR SOME,

MARKETING ANIMALS

A TOUGHER JOB

than raising them



©PeterHermesFurian/Getty Images

For some livestock and poultry producers, marketing animals successfully in today's business environment has proven to be a tough job—at times perhaps even more so than raising the animals.

Smaller producers, particularly, along with others not having a contractual agreement in place with a processor, can at times be shut out of the market. They may also be unable to sell their animals on a timely basis during periods

of larger production or around holidays when processors do not need as many cattle, hogs or birds to fill their reduced slaughter schedules.

This group of livestock producers may also be forced to sell on a negotiated cash basis, which at times can result in taking lower or less-than-average prices, delivery times that may not be the most convenient, or selling to another processing plant further away, requiring higher freight costs.

In an industry in which over 600,000 head of cattle and hogs along with around 36 million head of chickens and turkeys are processed daily, the logistics needed to provide the plants with this huge number of animals are massive.

Most of the poultry industry is made up of vertically integrated companies. In the pork sector, a growing portion is either vertically integrated or vertically aligned. These firms either produce their own animals or have contract producers who do so.

Many of the hogs and most cattle are still being raised by independent producers. For those who feed their animals to slaughter weight, numbers can speak volumes when it comes to bargaining over prices or in putting together a marketing agreement with a processor.

The transition to fewer but larger livestock operations has also led to a significant decline in local small livestock markets and buying stations. Some smaller independent producers no longer have a local buyer available and must haul their animals further to sell them, requiring more freight cost and time.



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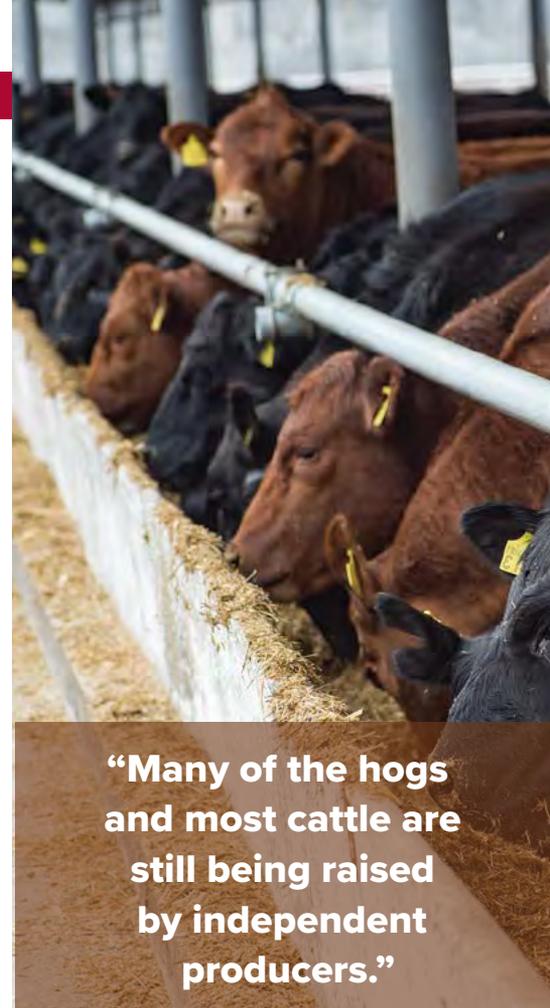
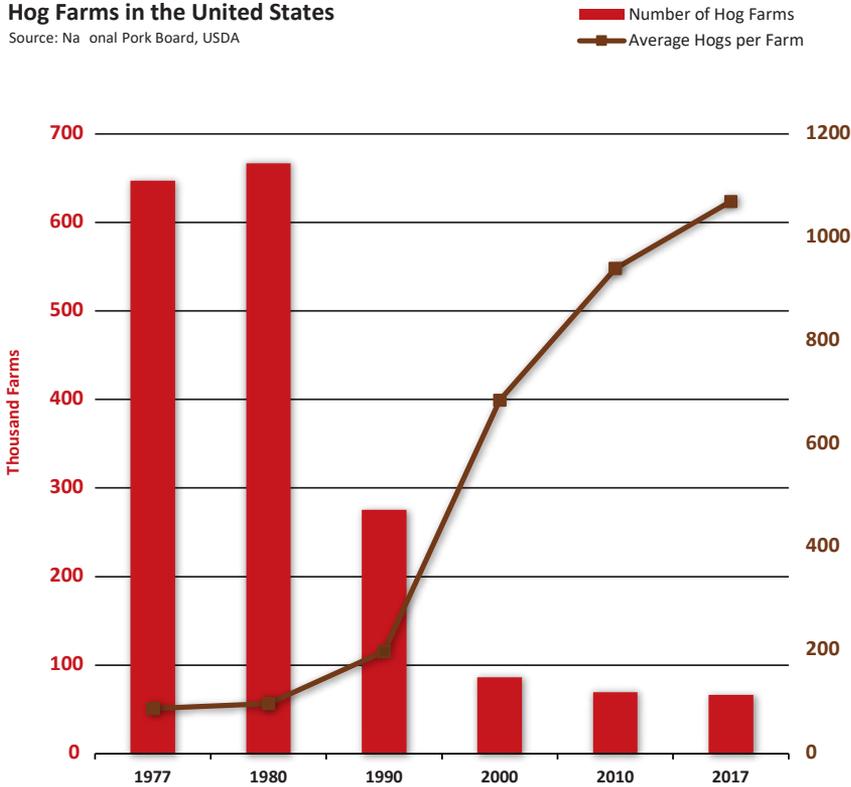
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Hog Farms in the United States

Source: National Pork Board, USDA



“Many of the hogs and most cattle are still being raised by independent producers.”

©sasapanchenko/Getty Images

In 1980, there were nearly 667,000 hog producers in the US with an average herd size of about 97 head. Just 10 years later, the number of swine farms had fallen to around 275,000 with an average of nearly 200 head. By 2010, only about 69,000 hog farms existed, and the average head count was 940. The first hog farm with 5,000 or more head occurred in 1996. By 2010, there were 3,100 farms with 5,000 or more head, according to National Pork Board statistics.

USDA price data for August through October show that, on average, hog producers selling on a negotiated cash basis received about \$9.80 per cwt less than the weighted average price for all sales not including packer to packer transactions. This difference amounts to nearly \$21 a head.

Raising the animals is one thing, marketing them successfully can at times be even more difficult. [UB](#)

Article contributed by Curt Thacker
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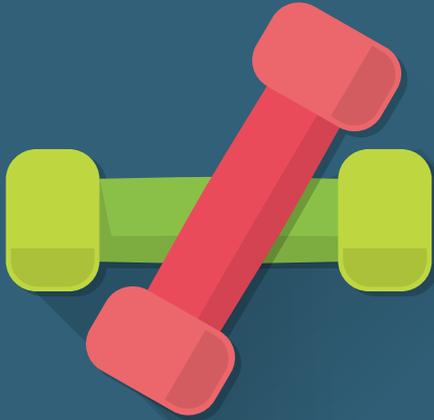
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Nutrition research at the forefront of protecting athletes



Ever think: “This is definitely our year, we are going to the championship!” Then, in a blink of an eye, your favorite sports team’s hopes are dashed due to an injury to their star player.

Let’s face it, a single injury to a prominent player can drastically change the complexion of a professional team, effectively bringing it from the “Penthouse” to the “Outhouse” rather quickly. As franchises continue to invest tens of millions, sometimes hundreds of millions into athletes, it is becoming more important to take a proactive role in protecting them.

At the forefront of this proactive approach is the topic of nutrition. For franchises across professional sports, nutrition has manifested itself as an essential building

block for maintaining peak fitness levels, a way to reduce preventable injuries, and promote faster healing cycles when serious injuries occur throughout a long season.

In the United States, many major franchises in the NFL, MLB, NHL, and even top college programs, have adopted some sort of consistent nutritional plans for their athletes. For example, teams like the New Orleans Saints, and Tennessee Titans in the NFL have invested up to seven figures in renovating their culinary facilities, hiring on site dieticians to educate and enhance the nutritional options offered to its athletes.

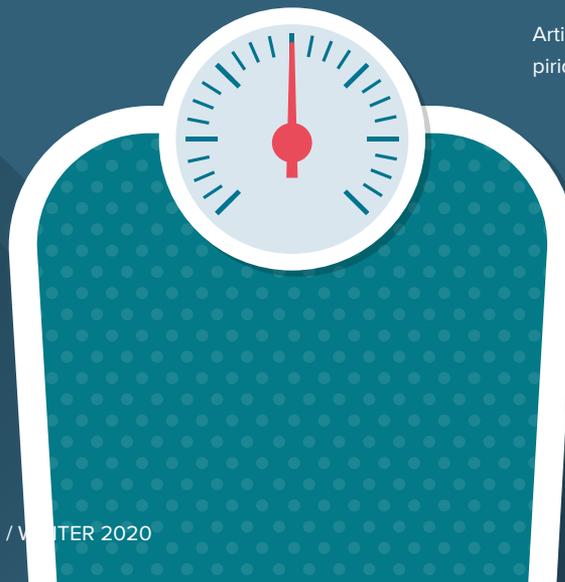
Across the pond, several teams in the Premiere League (ENG), La Liga (Spain) and Serie A (Italy) have also committed to revamping their nutritional offerings for their players. Footballers have grueling schedules nowadays, with additional club tournaments and national team matches on top of their normal league schedules.

The need to maintain peak performance and reduce injuries is increasingly important.

But what role does protein consumption play in this equation? Much has been made about the exclusion of animal-based proteins in diets recently. However, in terms of balancing an athlete’s diet for peak performance, animal-based proteins are essential to prevent iron and zinc deficiencies, while providing a source of B vitamins, B-12 in particular, which is specifically found in animal-based proteins. Furthermore, independent studies have shown that maintaining adequate iron levels improve low plasma ferritin, which was associated with an increase in performance.

So, if we were professional athletes what would our diet look like? Expect roasted chicken, grilled or steamed fish, and lots of vegetables. [UB](#)

Article contributed by Pete Iridoy
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Packing plant fire causes loss of capacity, leading to record margins

Boxed beef margins pierced through record levels driven by the reaction to the Tyson Food's Holcomb, Kansas plant fire late Friday, August 9, 2019 and closure of the facility for an extended, unknown period. Before we expand on that, let's look quickly at what set the table because these are topics we have covered if you have been reading our comments for some time.

In mid-summer, the industry started to see a contra-seasonal widening of the Choice and Select spread. Weather delayed the start of the summer demand period into a time that cattle marketings were more current than they have been in a long

time. The reduction in grading as a result tightened Choice supply when more and more customers were looking for it. This has continued throughout the year. The spread is at record levels for fall and is nearing all-time highs. In fact, since July 1, the spread has been over \$20.00/cwt each week, an unprecedented feat. Many believe this would continue through the balance of the year given the fundamental dropback of a solid economy.

Fast forward to that eventful week and retailers started to aggressively buy for planned features for Labor Day. This is typically a strong price period for beef and

2019 was not going to be an exception. Then news broke late Friday, August 9, that a beef plant in Holcomb, Kansas caught fire. It was reported that this plant was responsible for 6,000 head per day, or roughly 5-6% of cattle slaughter.

Cash cattle prices plummeted as a result of the short-term disruption. While there was concern that the industry may not be able to make up these numbers given the logistics of moving cattle around, or labor and capacity issues. But as the market started to normalize, slaughter rates began to near pre-fire levels.



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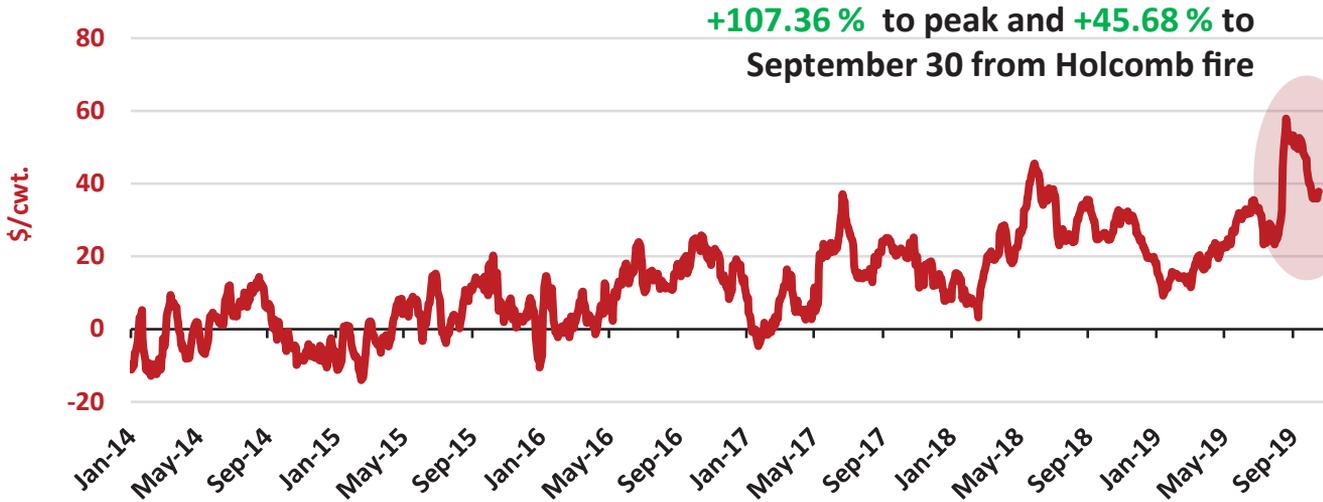
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**“Cash cattle prices plummeted as a
result of the short-term disruption.”**

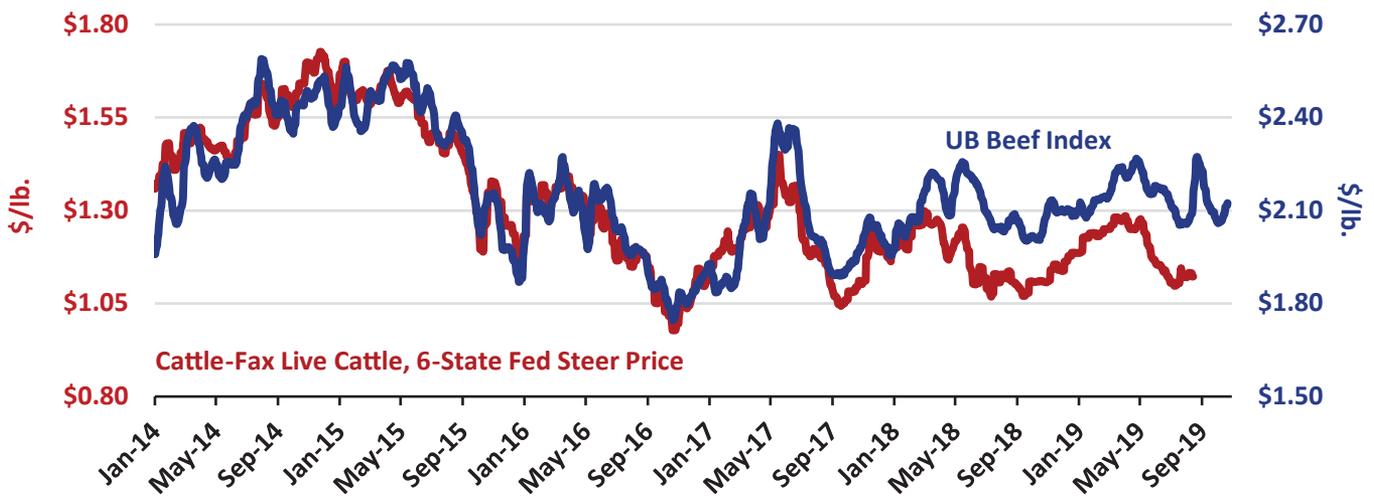
UB Boxed Beef Margin

Source: Urner Barry



Live Cattle Prices v. Wholesale Beef Prices

Source: Cattle-Fax, Urner Barry



Prior though, buyers of beef were quickly scared of the idea of scarcity of product in the market at a time when they really needed it. Packers used this leverage to push prices up significantly every day. Cutout values were largely in the green behind middle meats and grinds, but the strength was broad-based.

As a result of the confluence of these factors, margins shot up quickly. In fact, in one week, they gained over 61%. There were only 17 instances in the last five years that margins started greater than \$20.00/cwt and moved over 30% in five days.

And in only one instance in May 2017 did the margin gain more in a five-day period. Margins more than doubled from the fire date to the high (+107.36%), and at the end of September still sat 45.68% higher despite this compression. [UB](#)

Article contributed by Gary Morrison
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Major COMTELL upgrades are coming in 2020

Urner Barry is making exciting strides in its COMTELL redesign. COMTELL is receiving a complete overhaul with changes geared towards providing an improved and streamlined user experience.

After a thorough assessment of our staple product, we found that user customization, intuitive navigation, and ease of access to market prices and data are top priorities.

We believe these improvements to our homepage, navigation, charting and more will be a hit for both long-time and new users.

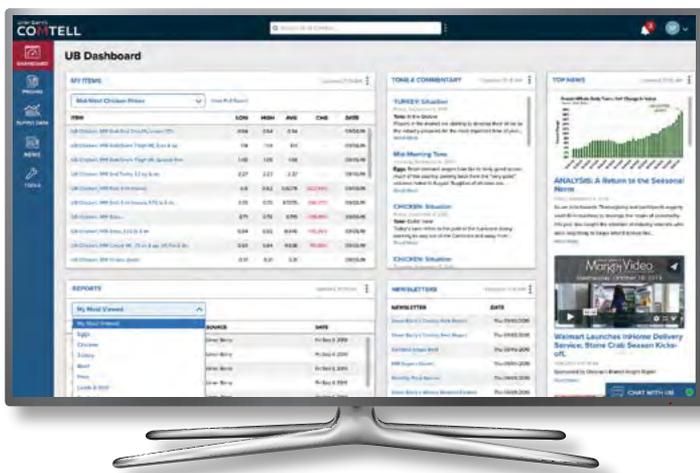
Currently, the homepage of COMTELL is the same for every user, whether you are a beef packer or shrimp importer. While this provides a nice overview of the protein industry as a whole, we know that your time is valuable and seeing the news, quotes, and data that are relevant to your job function would be preferred. With this in mind, it was time to bring a customizable experience to the table.

The new COMTELL homepage features a customizable dashboard. Now it will be possible to build a homepage tailored to each user. You can now have relevant quotations, reports and news all in one place.

Implementing a menu that makes navigating COMTELL as easy as possible was a high priority for Urner Barry. Both newcomers and industry veterans will find our new flyout menu more natural to use.

Access to our plethora of reports has never been easier. The reports you check every day will appear first. Plus, our new vertical menu structure will reduce the number of clicks needed to maneuver through different commodity reports and data.

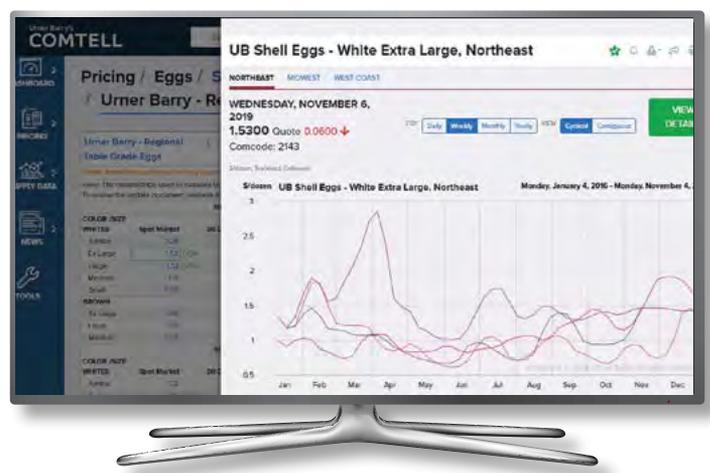
Our market pages are receiving a touch up with a new clean, sleek look. The fresh design provides the same valuable information in the same order that you are accustomed to, it just adds some highly requested functionality.



MyItems, the most visited section of COMTELL, will now be accessible through the dashboard. Our popular portfolio tool will no longer be hidden behind a dropdown menu anymore.

All of your preferences will be saved, so the next time you come to the site, COMTELL will be tailored to your needs.

Refreshing, isn't it?



The new market pages will now adjust more easily to different screen sizes. They also have two unique features, including a filter option to help find a specific quotation, and the ability to change the currency and unit of measurement.

Our new item flyout window will appear after an item in a market report or MyItems is selected. The flyout will provide a summary

“...COMTELL will be tailored to your needs.”

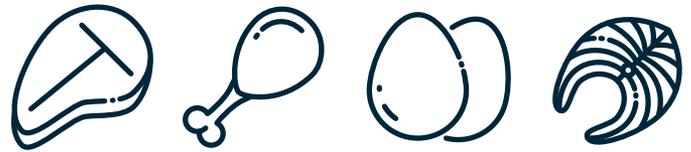
of the chosen item that includes an interactive chart and critical statistics. Looking for more? The “View Details” option will display even more in-depth information.

The flyout menu will also keep you on the same page as the market report. No more having to navigate back to the report after viewing an item’s details.

Assessing the history of an item is an integral piece of the COMTELL experience. Alongside the market pages, history pages also received a facelift.

History pages will feature more intuitive controls, including a more interactive and yet easier to use chart. Creating a “Quote Alert” for an item to receive alerts on price movement will now be a breeze.

The date selector tool saw attention as well. It will be simple to create a custom range for data, and those changes will be reflected in both the chart and data table.



Report and quote alerts now appear in one place. A new notifications menu will be a click away.

Report alerts can be set when selected reports are updated. Quote alerts are created when a user sets a specific condition for a quotation, and if they are met, it will send a notification. Users can create alerts at multiple points on COMTELL. [UB](#)

Article contributed by **Russell Barton**
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If you are interested in being an early adopter of new COMTELL, please email Russell Barton at rbarton@urnerbarry.com. We will notify you when the site is ready to be experienced.



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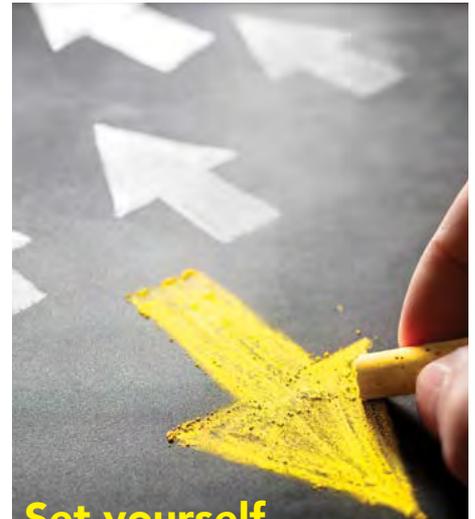


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Joseph Muldowney, Publisher

COMTELL through the ages

COMTELL. Most of those involved in the protein trade know the name well—but do they know the history of this leading market information platform?

Urner Barry's flagship service COMTELL (named for "Commodity Intelligence") was first launched in the early 1980s. Providing the latest in market news, quotes and statistics, COMTELL has served the needs of businesses operating in the food and agriculture industry proudly, adapting over the years to both changing technologies and evolving demands of the industry. From delivering market data via mail, to over the phone, via fax, then email, then online—Urner Barry has aimed to meet customers where they are.

Urner Barry is the oldest and most respected commodity market news reporting service in America, with roots dating back to 1858. The company is fully operative 150+ years later and continues to evolve and expand in tandem with rapidly advancing technologies and increasingly instantaneous means of communication. Urner Barry's extensive history includes a time before the advent of the world wide web and personal computers. Prior to COMTELL, Urner Barry's data was distributed via traditional means such as by phone or mail.

Executive Secretary Lynn Dekovitch, who has been with the company since 1976, recalls the wire room where thirty-seven customers would call in every morning to hear the mid-morning tone for turkey, chicken, and eggs. Pointing to a picture taken of her with an early model PC, Lynn explains the limited, fixed-format pages she worked with. It may seem archaic relative to the technology we have now, but this means of data entry was cutting edge at that time. Urner Barry has prided itself on utilizing the latest technology for the benefit of our readers. As technology advanced, so did the company.



Urner Barry's Executive Secretary Lynn Dekovitch enters data on an early PC during a time when COMTELL was in its early development.



An early version of the COMTELL logo...



...and as it appears for 2020.

Hence, COMTELL was devised. Its early home was a free-standing trailer. Senior Vice President Russell Whitman, who joined Urner Barry in 1986, recalls how COMTELL had to be set up and hard wired with a satellite dish. Labor intensive and tedious, Russ reminisces how "we hated winter snow storms because it hindered our ability to get the news out!!!" The days of laying cables for our customers are a not-so distant past, but COMTELL has since developed into a powerful platform reaching thousands of industry professionals daily.

Participants in the protein industry are well familiar with the scarce and precious commodity, one which cannot be quoted or bid on: time. That's why, in 2020, Urner Barry Publications is celebrating the New Year with a revamped and redesigned COMTELL site. Subscribers will be greeted with a brand-new customizable experience.

The remodeled COMTELL site is tailored to each subscriber's specific needs and preferences—saving valuable time while broadcasting the most relevant commodity reports and data. The redesigned site is centered around intuitive navigation and ease of access to our market prices and data—all of which are displayed in a streamlined, eye-pleasing layout featuring Urner Barry's updated branding.

With a growing subscriber base, the need for a streamlined website was increasingly paramount. IT Director Frank McQuarrie, who wrote the company's first website in 1995, stressed the importance of a "third-party view" when evaluating subscriber preferences. With the help of UX Team, who implemented various shadowing sessions and interviews, the sleek new COMTELL was built.

CEO Joe Muldowney explains it is "really the customers who designed the interface." The heavily used MyItems feature sits front and center on the homepage, which allows users to create a fully customizable dashboard. Access to our abundance of reports can be viewed with ease. Items selected will appear on a flyout window, ensuring the reader never loses their place when navigating data. These are just a few of the latest features designed to enhance user experience and advance Urner Barry's mission to provide timely, unbiased, and accurate reporting.

The protein industry is a vast and endless sea of information, and the team at Urner Barry works tirelessly to ensure our subscribers never miss a beat—whether that's via Morse code, satellite, the world wide web, or whatever follows next. [UB](#)

Article contributed by **Courtney Shum** | cshum@urnerbarry.com



Wire room operators would call customers and have the markets read to them right from the publication.

Urner Barry's Reporter

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