

91% of Americans are doing it every month...

Guilty pleasures: Millions of diners heading to QSR outlets

It's nothing to be ashamed of, we all do it. Sometimes the temptation just proves too great and we have little choice but to give in. After all, sinful or not, those ads featuring mouth-watering meals, tempting treats and thirst-quenching beverages are hard to resist. Just head on down to your local QSR outlet or casual dining chain where millions of Americans have joined the ranks of heavy diners, forcing established chains and relative newcomers to increasingly compete in this segment that has weathered a slowing economy, trans fat bans and E. coli related produce scares.

**"...it's important...
to offer high
quality products
that appeal
to a variety of
consumers."**

competitors building up their breakfast menus, it's important we continue to offer high quality products that appeal to a variety of consumers."

Some of those up-and-comers in the QSR sector like Wingstop have had phenomenal success with the lunch and dinner crowd. Established dining chains like Charlie Brown's Steakhouse and Red Robin Gourmet Burgers

Burgers, Inc. are broadening their appeal to this growing audience, carving out an even

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Beef's choicest cut...

A cut above the rest: The bone-in filet mignon

If you were invited to a backyard barbeque on a nice summer day, chances

are you would not be served an appetizing and tender bone-in filet mignon. While your host may want to grill up this tasty cut of steak, it's not a product ordinarily found in your local retail grocery meat department.

Why not? The lack of availability of this bone-in cut of tenderloin is two-fold. First and foremost, it is mostly provided to high-end steakhouses. Secondly, the butcher and retail grocer is likely to find the price of this mouth-watering steak a bit too costly for the usual customer.



Photo courtesy of Allen Brothers

With today's diner crunched for time more than ever, QSR and casual dining convenience has joined taste and nutrition in redefining this industry segment, and the consumer has caught on. According to a 2006 survey conducted by Scarborough Research, 91% of Americans report having eaten at a QSR in the past month, 18% have done so at least 10 times, and children in the household only further drive the likelihood of being a heavy QSR diner.

It's this large portion of the U.S. population that established chains like Wendy's and Jack in the Box are targeting in the fierce battleground over the breakfast meal occasion. In the February 6, 2007 issue of *Food Business News*, Teke O'Rourke, director of menu marketing and promotions for Jack in the Box, had this to say: "With new players entering the breakfast market and longtime

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Cover: Guilty pleasures: Millions of diners heading to QSR outlets

Take a peak at the fierce battleground of casual dining chains and QSR outlets.

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First major overhaul in a decade.





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PUBLISHER
Paul Brown Jr.

SENIOR EDITOR
Russ Whitman

MANAGING EDITOR
Joe Muldowney

CONTRIBUTORS
Jim Kenny
Janice Brown
MaryAnn Zicarelli
Dave Herrick
Linda Lindner
Greg Deppeler
John Sackton
Ken Coons
Angel Rubio
Rusty Dean
Bruce Longo

COPY EDITORS
Lynn Dekovitch
Linda Lindner

CREATIVE DIRECTOR
Glenn F. Juszczak

PRODUCTION MANAGER
Chris Ashley

ASSOCIATE DESIGNERS
Maria Morales
Leah Salto

ADVERTISING
Janice Brown

SUBSCRIPTION INFORMATION
800-932-0617



URNER BARRY PUBLICATIONS, INC.
Tel. 732-240-5330
fax 732-341-0891
www.urnerbarry.com
mail@urnerbarry.com

Leaving a permanent mark on the fishing

Hastings:

Historic fisheries clear winners in the battle for sustainability

At the heart of England's fishing industry is Hastings, a historic town best known for the Battle of Hastings in 1066, in the South East part of the country. Until the development of tourism, fishing had been its major industry. Today, fishing continues off its coast, and its fishing fleet remains the largest beached-based fleet in England.

For hundreds of years, generations of families of this small town have taken to the seas under the Hastings' Cliffs and in all weathers. Rather than having the fishing industry die out, Hastings made a farsighted investment in its economic future as well as the marine environment. It has committed to sustainable practices and, by doing so, has firmly planted itself

in the 21st century.

Three Hastings fisheries have recently won accreditation for their sustainable methods—Dover sole, mackerel, and herring. It is one of only a handful of fishing industries that was given accreditation by the Marine Stewardship Council (MSC), recognizing the eco-friendly way they fish.

MSC certification does not come easily, it is a long process and demands close attention to the way fish are caught. Fisheries are only certified to MSC standard when they can prove the way they fish will not damage the marine environment.

The logo for Prestage Foods, featuring a stylized archway with the company name "PRESTAGE FOODS" in a blue banner at the top. Inside the archway is a large blue and green "P" logo, with the words "Family Owned" in a script font to its right. Below the "P" is a red banner with the words "PREMIUM YOUNG TURKEY" in white, bold, sans-serif font.

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In a nutshell, fisheries with this certification can guarantee they have met three key criteria laid down by the MSC:

1. Environmentally sensitive and sustainable fishing methods have been used.
2. The target fishing stock is sustained and other fish stocks are not affected.
3. There is proof of good management of the fishery.

Each haul has an established chain of custody, signed off and checked at every stage of the fish's journey to your dinner plate.

Fisheries with this certification are subject to annual inspections and have paperwork checked regularly. They are also able to use the highly respected MSC logo on their wrapping, so look out for the mark when you buy your fish.

For Hastings fishermen, certification gives them the edge over market competitors. It offers guarantees that each fish has been caught with the minimum impact on the environment and from a sustainable source. Many feel that the certification

finally gives the fishermen the deserved recognition for the important contribution they make to the town's economy.

Hastings Borough Council leader Peter Pragnell said: "Hastings is very much built on the tradition of the fishing industry, and it's a part of our culture. It's also an industry we want to see not just surviving, but thriving, and this certification will go a long way to securing that." **LB**



"Hastings has committed to sustainable practices and, by doing so, has firmly placed itself in the 21st century."



Going green continues growth

The market for organic food and natural products has been steadily increasing. In fact, the American Organic Trade Association (OTA), the membership-based business association for the organic industry in North America, forecasts an average annual growth of 11 percent until the year 2025. A cautious prediction considering growth in the year 2005 was over 30 percent!

Cautious or not, this calculation still reflects the fact that this is a market not to be ignored. According to the OTA's 2006 Manufacturer Survey for 2005, the U.S. organic industry grew

"The organic foods segment represented the largest and most clearly defined part of the organic industry."

17% overall—reaching \$14.6 billion in consumer sales. The organic foods segment represented the largest and most clearly defined part of the organic industry increasing 16.2% and accounting for \$13.8 billion in consumer sales.

Knowing that the market for organic products continues to increase, some manufacturers have attempted to take a piece of that marketshare without going through the proper channels. Consumers become obviously confused when manufacturers use the terms natural and organic interchangeably. The terms should not be confused. Other claims, such as free-range and hormone-free, although truthful, should not be substituted for the term organic.

Food bearing the USDA organic label

has been certified as meeting USDA organic standards in effect since October of 2002. This means that as of this date, consumers can be assured that products labeled organic have been produced in compliance with U.S. organic law. This law regulates the standards that organic producers and handlers must adhere.



To this date, there are still no federal standards for labeling fish as organic. Officials agree that the organic label should never be applied to wild fish because that would go against the very origin of the word. The verdict is still out, however, on farm-raised or aquacultured fish, and should a consensus be reached, it would still require an implementation time period before fisheries would be able to meet the chosen USDA standards. **US**



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Frank E. Urner, grandson of Urner Barry founder, passes at age 95

This past March, one of the last descendants of Urner Barry Publications' founding fathers, Frank E. Urner, died at the age of 95. Frank was the grandson of founder Benjamin Urner, who started the company in 1858. It is with saddest regret that we report his passing.

A highly regarded analyst of the wholesale fruit-and-vegetable, live poultry and egg markets, Frank had his early beginnings in the industry working for his father when the company was simply known as Urner-Barry Company. He later became one of the principal owners of Urner Barry Publications Inc, until his retirement in 1974.

Colleague and former partner John Carter worked with Frank and had this to say about his passing:

"It is with sadness that I learned of the death of Frank Urner. Frank pioneered a major transition in the science of market reporting. For years the New York terminal market area and the New York Mercantile Exchange provided the information for the Urner Barry Reports. Frank, early on, recognized the declining importance of these sources. There was much resistance, but he persevered in cultivating country-wide contacts and enlarged sources of market information and making a truly national digest of market information."

"He was totally impartial and fair, qualities that are absolutely necessary for a successful reporter."

Urner Barry's past President Paul B. Brown had the pleasure of working with Frank Urner during another highly transitory time in Urner Barry's history, and expressed his sorrow for a man who

was instrumental to his career:

"When I started working in market news for the USDA in 1955, I wondered what this company, Urner Barry, had to do with the egg and poultry industries. Later, I found that Urner Barry was the basis for most of the pricing in these industries."

Frank E. Urner was the president and leader of Urner Barry Publications. In 1965, he offered me a partnership in the company and for the next 20 years Frank led the company through the most trying years of its existence.

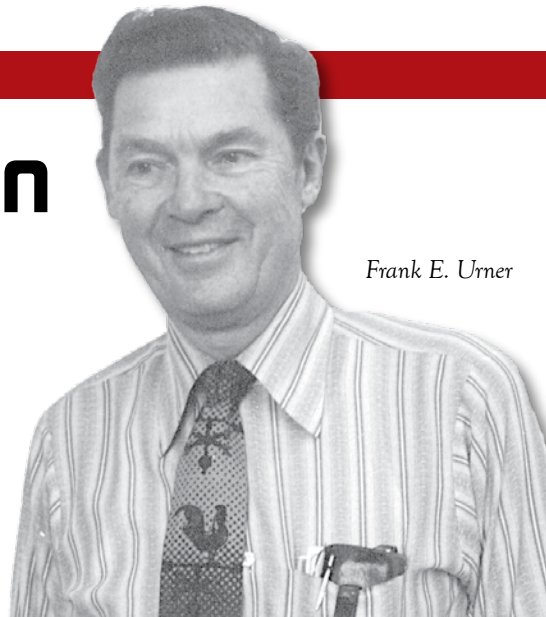
The industries we served were rapidly expanding and price discovery, under his leadership, changed accordingly. With his leadership Urner Barry successfully challenged the USDA in a copyright infringement suit which insured our position in the industry.

Frank's main strength was in his ability to train market reporters. He was totally impartial and fair, qualities that are absolutely necessary for a successful reporter."

During his 30-year career at Urner-Barry Frank resided in Westfield and Mountainside, NJ. Following retirement, he made his home first in Liberty, ME, and then in Carlisle, PA, before moving to Gettysburg in 1994. During his retirement years he was a well-respected dealer in early American antiques.

The son of the late Frank A. and Zella Urner, he is survived by Virginia Urner, his wife of 70 years, two daughters, Lynne Baxter of Gettysburg and Robin Whitebay of Highland, NY, and one son, Frank A. Urner of Glendora, CA, and predeceased by one sister, Charlotte Pamplin.

All those who worked with Frank Urner share in the sadness of his loss. In conclusion, are the farewell sentiments of



Frank E. Urner

former Urner Barry President, Michael E. "Bud" O'Shaughnessy.

"Frank was a leader in the egg industry. He was a pioneer in adapting to the needs of a modern, growing industry and highly adept at the dissemination of market news to our customers. His efforts laid the cornerstone for our current generation of reporters to build upon and improve the process of daily commodity price discovery." **UB**

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Wal-Mart remains the one to beat

The food retailing industry hasn't been the same since Wal-Mart burst onto the national scene back in the 90s. The super-giant of supercenters changed the way consumers did their food shopping and prompted a wake-up call to traditional food store chains. Since that time, the industry has gone through numerous mergers, acquisitions and sell-offs in an attempt to

maintain profitability and, frankly, viability in this extremely competitive industry.

2006 looked a lot like recent years where another series of industry mergers and acquisitions changed the lineup and faces of the top companies. Most significant among last year's developments was the break up and sell-off of Albertsons. This move almost tripled Minneapolis-based Supervalu's retail volume. During this transaction, the company acquired 1,124 Albertsons stores along with 301 Sav-A-Lots, bringing their grand total to 2,567 units with estimated sales of \$38 billion.

"...hundreds of additional supercenters scheduled to open over the next several years."

Wholesale, Safeway, and Supervalu rounding out the top five.

Uner Barry's Reporter looked into the industry rankings over the past few years and found some surprising, and not so surprising, developments. According to STORES Magazine's 2002 retail store rankings, only Wal-Mart and Kroger were still the ones to contend with for the top two spots. By selling off stores and exiting markets, Albertsons managed to stay in the third spot for 2002.

Not so surprising was Winn-Dixie's fall over the past five years to the 20th position in the SN's 2007 rankings. In 2002, they held the number eight spot, but after emerging from bankruptcy proceedings in late 2006, the Jacksonville-based grocer now has a chance at reclaiming a more solid foothold in the rankings. The Great Atlantic & Pacific Tea Company has dropped ten positions during the past five years, now holding the 21st position behind Winn-Dixie. **US**



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TOP 10 RETAILERS 2001

- 1 WAL-MART STORES
- 2 KROGER CO.
- 3 ALBERTSONS
- 4 COSTCO WHOLESALE CORP.
- 5 SAFEWAY
- 6 AHOLD USA RETAIL
- 7 PUBLIX SUPER MARKETS
- 8 WINN-DIXIE STORES
- 9 MEIJER
- 10 A & P

TOP 10 RETAILERS 2006

- 1 WAL-MART STORES
- 2 KROGER CO.
- 3 COSTCO WHOLESALE CORP.
- 4 SAFEWAY
- 5 SUPERVALU
- 6 LOBLAW COS.
- 7 AHOLD USA RETAIL
- 8 PUBLIX SUPERMARKETS
- 9 C & S WHOLESALE GROCERS
- 10 DELHAIZE AMERICA

Sources: Supermarket News 1/22/07 Industry Rankings Supplement
Stores Magazine 2001 Food Retailer Rankings

Mountainous dietary concept...

Shopping for healthy options just got easier

You know you're supposed to eat healthy, you even want to eat healthy, but you're uncertain how to do it, and when it comes to shopping, you just get confused looking at all the different selections. Now, help is on the way with a new collaborative effort developed by the food industry and the government called the "Take a Peak" program—a national campaign to promote the USDA's recommended diet advice system known as MyPyramid.



beverage products that meet specific nutritional criteria and provide a meaningful contribution

toward helping consumers reach the goals of MyPyramid are eligible for the program.

FMI president Tim Hammonds said, "All our research shows that consumers are eager for healthy food choices and dietary information that will help them



control the ingredients in their meals and support healthy eating at home. Take a Peak is an excellent example of a valuable collaboration that can reach millions of consumers and change behavior." **UB**

"small, progressive changes in purchasing habits and diets can improve health."

Designed to make shopping in grocery stores for healthier options more simple, the Take a Peak movement consists of aisle banners, informational kiosks, floor graphics, educational coupon booklets and other displays. Developed by the Grocery Manufacturers Association/Food Products Association, the Food Marketing Institute and MatchPoint Marketing in a partnership with the USDA, the goal of the program is to show consumers how small, progressive changes in their purchasing habits and diets can improve health.

Consumers at participating Publix, Giant Eagle, Brookshire Grocery Company, Raley's and Supervalu stores are able to walk the aisles taking steps on the track to better health. In all, 2,000 stores in 17 states will promote the effort, with more expected to join the campaign as it catches on.

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Just the facts...

Crabmeat Grading

The Reporter's Guide to...

Picking on crabs is big business...

To manage consumer resistance to preparing their own crabs, the industry has developed a substantial picking business. Crab meat is generally available in the following forms:

Jumbo Lump • The two large unbroken white meat pieces of the body which are connected to the swimming legs.

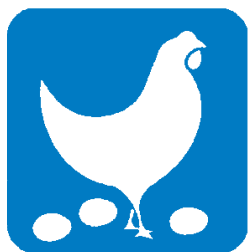
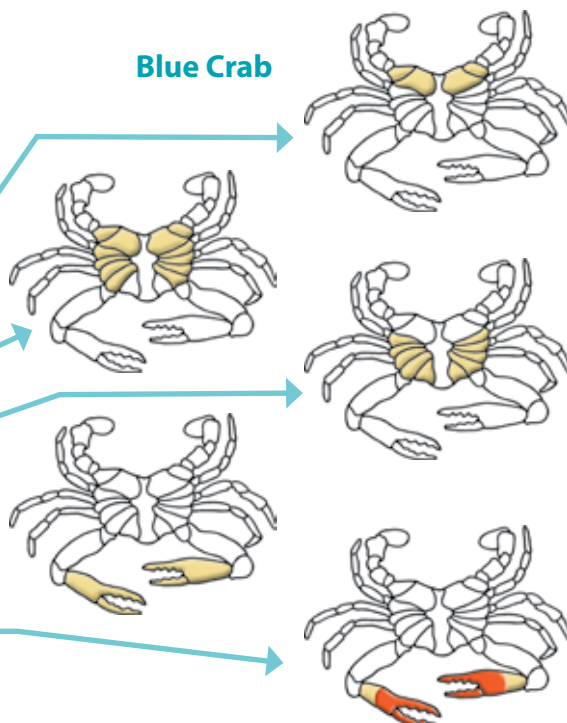
Backfin or lump • The large flakes of white body meat with smaller and broken pieces of jumbo lump.

Special • White body flake meat.

Claws and fingers • Meat from the claws and legs which is darker and a little more fibrous than the body meat.

Cocktail claws • Claws with part of the shell left on, ready to eat. The remaining shell makes it easy for the diner to pick up the claw. **LB**

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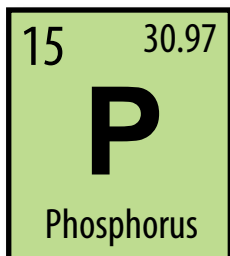


Phosphorus:

Helps metabolize fats and proteins

A component of healthy bones and teeth, phosphorus is an important mineral in the body needed for forming enzymes and genetic materials. Phosphorus is also involved in the metabolism of fats, carbohydrates and proteins, and in the effective utilization of many of the B group vitamins. Proper levels of vitamin D and calcium are required in order for phosphorus to function properly.

Found in a wide range of foods, the best way to ensure an adequate intake of this mineral is to eat a variety of phosphorus-rich items. Foods high in protein seem to be the best sources of phosphorus.



It is unlikely that you would ever develop a dietary deficiency in this mineral as it is abundant; however, signs of low phosphate levels include loss of appetite, anemia, muscle weakness, bone pain and

SELECTED FOOD SOURCES OF PHOSPHORUS

FOOD SOURCE	SERVING SIZE	PHOSPHORUS (mg)
Milk, skim	8 ounces	247
Egg	1 large, cooked	104
Beef	3 ounces, cooked	173
Chicken, light meat	3 ounces, cooked	155
Turkey	3 ounces, cooked	173
Fish, halibut	3 ounces, cooked	242
Fish, salmon	3 ounces, cooked	252
Pork, loin chop	3 ounces, cooked	180

numbness and tingling of the extremities.

Phosphorus is lost in the cooking of some foods, even under the best conditions. To retain phosphorus, cook foods in a minimal amount of water and for the shortest possible time. Roast or broil lamb, veal, pork, and poultry. Beef, however, retains its phosphorus regardless of the cooking method. **UB**

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▲ Chris Hill Vista Food Exchange; Lee Matthews Harrison Poultry



▲ Sal Prevette Sr., Fancy Foods; Adam Sahn, Porky Products; Sal Prevette Jr., Fancy Foods; and Cannon Ong, Perdue Farms



▲ Sue Ratkiewichm, Unilever; Paul B. Brown Jr., Urner Barry; Michael Enna, Unilever

The 26th installment of an evening at Meadowlands Racetrack was celebrated on Friday March 2, 2007. Sponsored by Urner Barry Publications, this popular food industry event has become a well-anticipated annual affair for guests

involved in the red meat, seafood and poultry industries.

From humble beginnings, circa 1980, an organization known as the West Washington Market Men's Club began hosting a yearly social event at the Racetrack. In the year 2000, when the Club disbanded, Urner Barry Publications stepped in, and from that time on graciously carried on the tradition.

Comprised of industry players, primarily from the east coast but from as far away as the southern and Midwestern reaches of the nation, the popularity of this event continues to bring together more and more people each year.

This past March more than 700 industry professionals broke bread with new and old business acquaintances amidst an exhilarating and social atmosphere. A wonderful evening was had by all who attended. Complete with an international buffet and harness racing, business colleagues placed bets while they dined and mingled in the beautiful Pegasus restaurant overlooking the racetrack.

Urner Barry plans on hosting the 27th annual event March 7, 2008. **UB**



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▲ David Lieboitz, Interstate Foods; Kent Seelig, Main Street Wholesale Meats

Bill Levif, Watson's Quality Food Products;
Sal Grande of Aramark





▲ Steve Levine, Empire Beef and Greg Martin, Foodcom



▲ Dave Lapage and Clint Walenciak, Certified Angus Beef; Lou Wnek, Wolverine Packing Co.; Glenn Strickholm, Tyson Fresh Meats and Dave Macvane, Certified Angus Beef



▲
Tim Morrow and
Bob Tomlinson of
Mountaire Farms



▲ Alan Gordon, Waybest;
Pete Gress, Koch Foods;
Carl Fischer, Tyson Fresh Meats



▲ Mike Navarro, Bozzoto's; Brad Dunn,
Chuck Nasscimbeni, Mike Parker
all of Allen Family Foods, Inc.

▼ Bob Tomlinson, Mountaire Farms;
Tim Zuck, Wolverine Packing Co.



► Keith and Vinny Mennella,
Mennella's Poultry Co.;
and Jonas Meyer of
Robinson and Harrison Poultry



▲ Stuart Liefer of Pierce Int'l Trading Inc.;
and Bruce Longo of Urner Barry



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New Zealand:

Free market economy competing globally

Initially settled by Maori fisherman and later colonized by the British, New Zealand has just recently begun to garner attention as a capable player in the global market. Gaining its independence from British rule in 1907, the two nations remained close allies until the 1980s when many of their defense alliances lapsed.

Today, New Zealand is enjoying a positive economical situation. Over the last 20 years the government has transformed the once agrarian economy to a more industrialized, free market economy that can, and does, compete globally. This growth has boosted real incomes, broadened technological capabilities, and contained inflationary pressures. Per capita income has risen eight years in a row and looks to



Waitemata Harbour in Auckland, New Zealand

continue as New Zealand seems to be on pace for another profitable year.

Numerous agricultural items, such as beef, lamb and seafood, position New

Zealand in direct competition to the United States on the global market, and in some cases, our own domestic market. Add to that an expanding grain and wheat production, a significant fruit and vegetable industry, and New Zealand's exploding tourism sector, and you have a recipe for continued growth and future success. **UB**

New Zealand / US comparison



AREA	268,680 km	9,631,418 km
COASTLINE	15,134 km	19,924 km
POPULATION	4,076,140	295,734,134
LIFE EXPECTANCY	78.81 years	77.71 years
GDP	\$106 billion	\$11.75 trillion
GDP (per capita)	\$26,000	\$40,100
AGRICULTURE AS A %GDP	4.3%	0.9%
AGRICULTURAL PRODUCTS	beef, lamb, wool, wheat, fruits, fish	fruit, wheat, corn, grains, poultry, beef, vegetables
LABOR FORCE	2.18 million	147.4 million
UNEMPLOYMENT RATE	3.8%	5.5%
OIL PRODUCTION / CONSUMPTION	0.0286 / 0.1506 (million bbl/day)	7.8 / 19.65 (million bbl/day)

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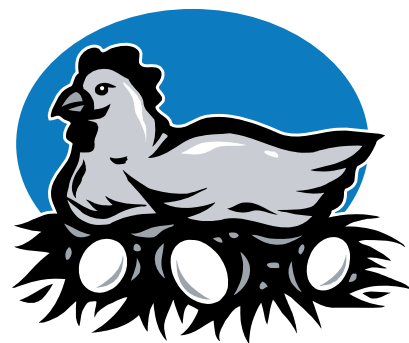


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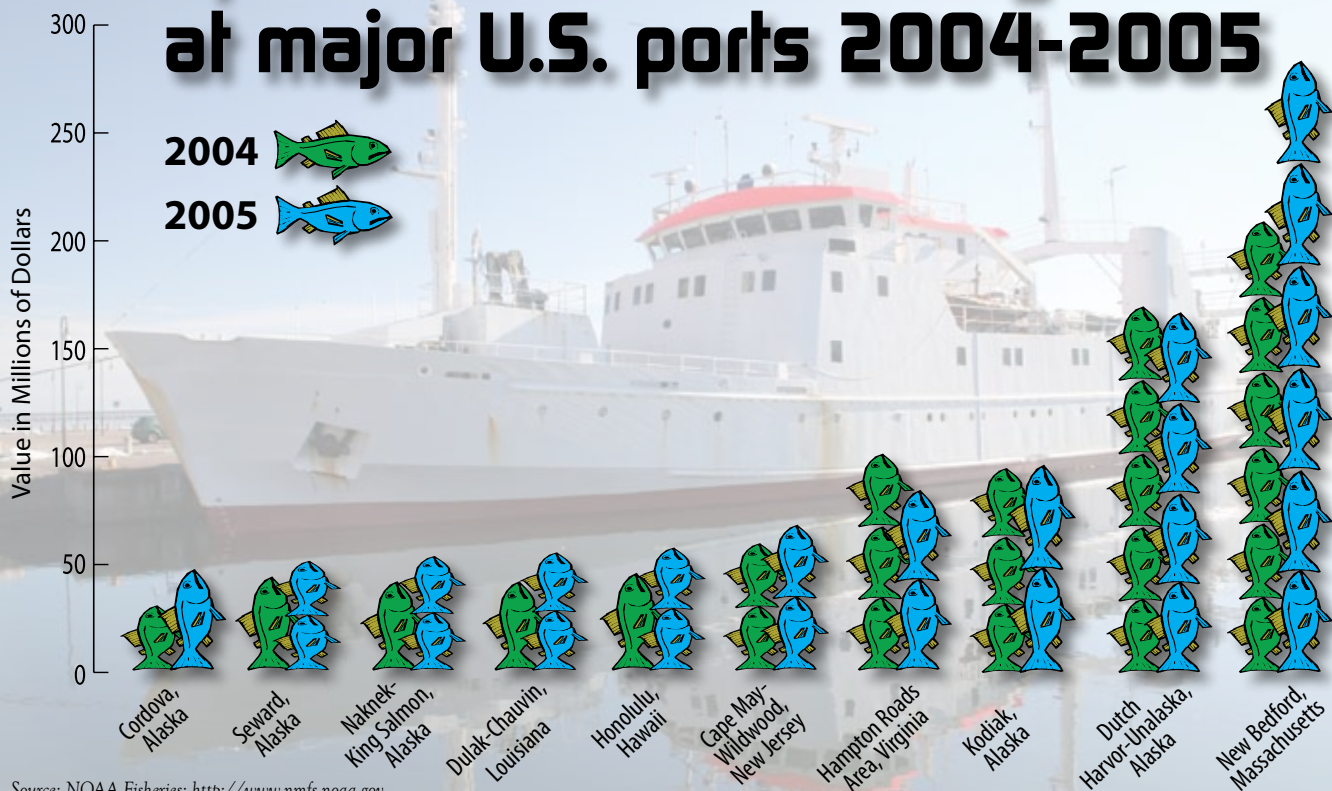
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CITES secretariat releases provisional assessment of Brazilian spiny lobsters

Brazil has recently proposed CITES Appendix-II listing for Caribbean spiny lobster (*Panulirus argus*) and for smoothtail spiny lobster (*P. laevidauda*). If CITES, the Convention on International Trade in Endangered Species of Wild Fauna and Flora, adopts the listing, it would result in a new level of trade documentation and scrutiny for *P. argus* imports.

However, CITES sources say Brazil's case is weak and poorly documented, and it appears that the measure will be postponed, rather than enacted this year.

Panulirus argus (Caribbean spiny lobster) and *P. laevidauda* (smoothtail spiny lobster) are caught and managed locally in Brazil by the Management Board on Lobster's Usage Sustainability-CGSL. The board consists of government and civil society representatives, including fishermen and fishing companies, and advises the government on the adoption of measures

like the minimum size definition, establishment of catching season, fleet size and capture tackle. Realizing that the main market for this product is abroad, CGSL had recommended the Brazilian government enlist the help of CITES.

The Brazilian government has been monitoring these species for more than 40 years, and despite the effort, the government insists the stocks of these crustaceans reached an over-fishing situation, causing a decrease in productivity of about 64%.

CITES is an international agreement between governments that aims to ensure international trade in specimens of wild animals and plants does not threaten their survival. It proves to be one of the most important agreements on species conservation and the non-detrimental use of wildlife.

Appendices to the Convention are lists of species afforded different levels or types of protection from over-exploitation; in this case, Brazil is looking for an Appendix-II listing for the Brazilian populations of the Caribbean spiny lobster and the smoothtail spiny lobster.

Appendix I lists species that are the most endangered among CITES-listed animals and plants. They are threatened with extinction and CITES prohibits international trade in specimens of these species.

Appendix II lists species that are not necessarily threatened with extinction but that may become so unless trade is closely controlled. It also includes so-called "look-alike species." International trade in specimens of Appendix-II species may be authorized by the granting of an export permit or re-export certificate.



Appendix III is a list of species included at the request of a party that has requested aid in controlling trade. International trade in specimens of species listed in this Appendix is allowed only on presentation of the appropriate permits or certificates.

The issue will be taken-up at the CITES Fourteenth meeting of the Conference of the Parties, The Hague (Netherlands), June 3-15, 2007.

The CITES process and its impact on the U.S. is loosely addressed below...

1. Prior to April 23, the CITES Secretariat will send its final recommendations on all proposals to the member countries.
2. The proposal will be reviewed by the CITES Animal Committee for a recommendation.
3. If the Animal Committee approves the listing, it will send its recommendation to the full Conference of the Parties for a vote.
4. If it passes at the COP, the U.S. government will publish a notice in the Federal Register inviting public comments.
5. After these are received and reviewed, the U.S. Fish and Wildlife Service would publish an amendment to the U.S. rules that list protected species.
6. If included on the U.S. list for Appendix II, (1) importers need a permit from FWS; (2) import shipments require an export certificate from Brazil; and (3) shipments must clear at FWS designated ports of entry.

On March 5, 2007, the Secretariat released a provisional assessment from Geneva. It states "the information contained in the supporting statement is quite superficial and lacks data and references. The distribution of the two species is described in general terms only, and their range states are not mentioned. It is not clear from the supporting



Caribbean spiny lobster
(*Panulirus argus*)



Smoothtail spiny lobster tail
(*Panulirus laeviscauda*)

statement whether the species occurs in international waters. The proposal does not contain an estimation of the populations of the two species in Brazil, but expresses their perceived declines in terms of production. Owing to over-fishing, the productivity of the two species has declined by 64% between 1979 and 1993. Information presented on the evolution of the lobster production between 1993 and 2003 suggests however that annual production has usually been higher than the low point in 1993, and appears to stabilize. An increased fishing effort has been noted, particularly in the 1970s, 1980s and 1990s.

The supporting statement expresses international trade in United States dollar value only, which is of limited utility in the context of CITES listings. The supporting statement does not indicate how specimens that enter international trade can be distinguished from specimens of *Panulirus argus* and *P. laeviscauda* originating from other range States of these species, or from other lobster products in international trade. Overall, it is unclear whether the two species meet the criteria for inclusion in Appendix II."

Given the comments of the Secretariat, the proposal is not expected to pass. It is likely to be held back for further consideration. **UB**

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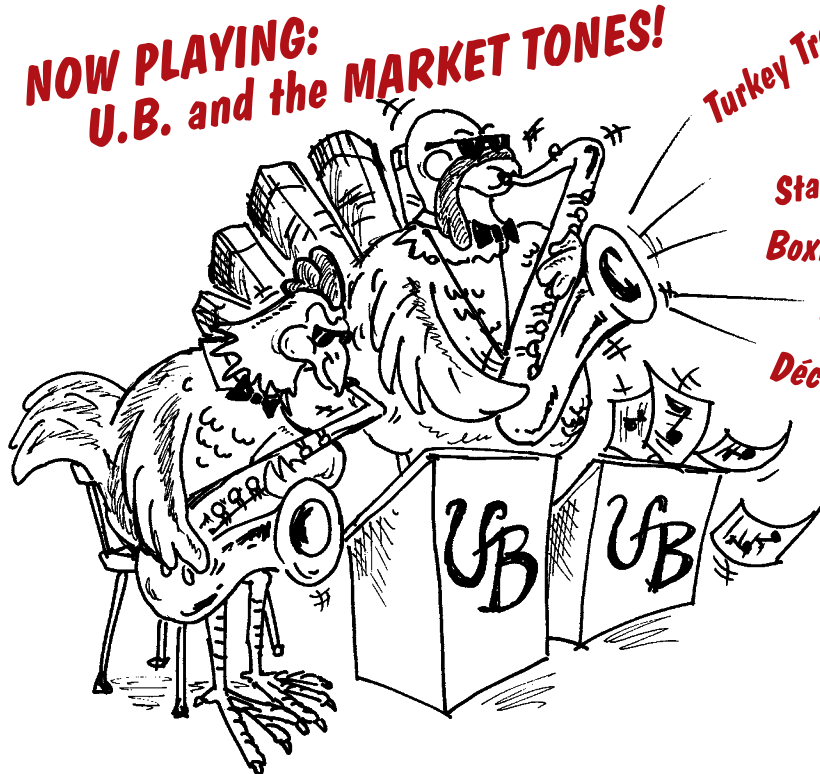
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The evolution of Urner Barry's poultry tones...

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Lockjaw

Standing Eight Count

Boxing the compass

Succotash

Décolleté

Achilles Heel

High Cotton

The chicken industry, followed later by the turkey industry, gained unprecedented popularity beginning in the late 1970s. The shift away from whole birds to a full array of parts prompted a revolution in the way Urner Barry described market conditions and trends.

While words like weak, steady and firm were the standard bearer for reporting the overall health of the market, the mundane and somewhat boring labels started to lose their luster. It was the brain child of Michael E. "Bud" O'Shaughnessy to update Urner Barry's previous methodology of describing poultry market trends and conditions by selecting a simple phrase or specific word that best defined conditions in the poultry marketplace for that particular day.



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The exact date in which Urner Barry issued this change is somewhat fuzzy; however, somewhere around August 10th 1979 is when the tone “Unstable” first appeared to Urner Barry customers, who at that time were Phone-tel subscribers. On October 19, 1981, the tone was first printed in the Urner Barry “Price-Current” under the Chicken Situation. Soon, a long list of catchy, if not dubious, words or phrases followed that often had many running to a dictionary or thesaurus to figure out just exactly what, “O’Shaughnessy,” was thinking of when he came up with his tone for that day.

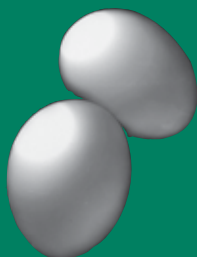
“In the early days Urner Barry’s tones were a bit liberal...but as political correctness mandated prudence, a more discretionary and conservative process became the practice...”

Here is a medley of tones from the archives: Standing Eight Count, Turkey Trot, Lockjaw, Succotash, Achilles Heel, Décolleté, Boxing the Compass, and High Cotton. Some of the following were classics: “Mother Hubbard” which indicted that the cupboards (stocks or inventories) were bare; or there was “Gorby” referring to the Former Russian premier who, back in the 1989, was reeling from the collapse of Communism. Needing to feed his people, he ushered in the era of importing U.S. leg quarters to Russia.

In the early days, Urner Barry’s tones were a bit liberal and even tended to the side of risqué, but as times changed

and political correctness mandated prudence, a more discretionary and conservative process became the practice in selecting the chicken and turkey tones. From the tradition established by Bud O’Shaughnessy more than twenty-five years earlier Urner Barry continues to take great pride in coming up with these words of wisdom and phenomenal phrases. Present day poultry reporters, Michael O’Shaughnessy and Russ Whitman always welcome their customer’s participation in the tone selection process. Who knows, it might be you who gives them the next great classic tone so it too can find a comfortable place in Urner Barry’s tone archives!**UB**

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by
Tobias Aguirre,
Executive Director, FishWise™

FishWise is the most comprehensive sustainable seafood sourcing and educational point-of-sale program in the United States. The program enables retailers to add value to their service seafood departments by answering customers' questions regarding sustainability and seafood health issues.

"We see FishWise increasing sales of sustainable seafood... and giving us a competitive advantage."

"FishWise is a great tool for our seafood counter because there is a lot of confusion about seafood among consumers, and it provides them with the information they need to purchase with confidence," said Reid Pomerantz, corporate meat and seafood buyer for Andronico's Markets, a chain based in Northern California. "We see FishWise increasing sales of sustainable seafood and seafood sales overall, and giving us a competitive advantage," he added.

After four years of serving grocery retailers primarily on the West Coast, FishWise is now available to retailers across America.

Developed in 2002, FishWise (www.fishwise.org) is the flagship program of Sustainable Fishery Advocates, a Santa Cruz, CA non-profit with partnerships with Environmental Defense and the Monterey Bay Aquarium. The program has been implemented in 35 retail locations and is impacting more than \$7 million in total seafood sales.

On average, FishWise Member Retailers have enjoyed an increase in total seafood sales of 11%. The sale of unsustainable products at member retailers has decreased an average of 68%, and more than 168,000 pounds of unsustainable seafood have been converted to more eco-friendly species. As a result, an estimated 130,000 pounds of "by-catch," or unintended catch, has been avoided since FishWise's introduction.

Green, yellow and red labels make choosing easy...

Each species within the seafood case is labeled according to its level of sustainability: green indicates best choice, yellow means some concerns and red signals unsustainable. Labels also convey where and how the seafood was caught, and whether it is farmed or wild. Materials include a Low Mercury List compiled by Environmental Defense which lists fish and shellfish that have been tested to be below the EPA cutoffs for contaminants.

In addition to labels and counter

signage, point-of-sale materials include a compact, free-standing kiosk which houses a 15" monitor that presents a short educational video with space for FishWise brochures and other educational materials.

To introduce and maintain FishWise, retailers receive management training, online training for seafood personnel, on-going support from FishWise staff, seafood ranking update reports, a FAQ Guide and reference binder, store audits and restocking of program materials, and promotion assistance. **UB**



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MRE: Meals for Re-Evaluation

Recently, there has been talk about the quantity of food and calories being provided to soldiers in their traditional meal packs, or MRE's. These 'Meals, Ready to Eat' have long been mocked by troops

in the field, but loved by the military for being virtually indestructible.

Recent complaints have showcased concerns that these meals are not providing enough calories for today's soldiers and the duties put on them. Reports of soldiers losing significant weight and suffering from the effects of a nutrient deficit have sparked outcry to update the meals themselves.

"At first glance, the heavy brown packaging looked more like munitions than a full meal..."

At first glance, the heavy brown plastic packaging looked more like munitions than a full meal, but once the contents were opened it was somewhat surprising.

Contained inside this 1,300 calorie MRE were the following items, an entrée package, two packages of bread (one slice each), a package of dried cranberries, a brownie, and a clear plastic bag with a pack of hard candy, a single serving bottle of Tabasco® sauce, flavored drink mix packet, two pieces of gum, a pack of matches, two napkins, one packet each of salt and pepper, a toothpick and a fork.

Urnar Barry's Reporter decided to do a little MRE sampling of our own, and acquired a current standard issue MRE. Oddly enough, our meal was based around a vegetarian soy patty, but nevertheless, was exactly what a hungry soldier could expect for dinner during deployment in the field.

The entrée is heated using a flameless ration heating device that uses less than one ounce of water. The heat generated from the chemical reaction is so great that the contents require cooling before consumption. The slices of bread are extremely heavy and dense, not exactly the



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most appetizing, but tolerable and quite filling. The brownie was fairly large and very chocolaty, however, had a strange gritty crunch to it. The dried cranberries added a nice sweet dessert to the meal.

Upon completion of the *Reporter's* test of the MRE, a full feeling was experienced, however, after only a few hours of desk work, hunger pangs returned. Although the MRE did provide a hot, ready-to-eat meal which included a dessert and a snack, it is easy to see how an active soldier would not receive the needed amount of nutrition from these meals, and therefore would not benefit from one. This also validates the sentiment that a revamping of these meals is necessary in order to provide better nutrition to our soldiers in the field. **UB**



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a message with a meaning...

Chicago hallmarks highlight sustainable seafood

Two historic cornerstones of the Chicago area, the PLITT Company, one of the largest seafood wholesalers in the Midwest, and the Shedd Aquarium, internationally recognized for its efforts in conservation and education, joined forces in October of

2003 to produce a period of events highlighting sustainable seafood.

Over that Columbus Day weekend, and in conjunction with National Seafood Month, the scheduled events within the aquarium included a variety of cooking demonstrations, hands-on activities, and a virtual fishmarket which highlighted sustainable seafood species. Consumers, restaurant owners and seafood purveyors were informed and educated about the importance of choosing sustainable seafood. The Right Brite program was also introduced.

Right Brite is a way the aquarium can arm individuals with the "right" information about their seafood choices. A handy seafood wallet card ranks 39 species or groups of fish and shellfish within color bars which let consumers know whether their choice is a sustainably fished product.

"Chicagoans can become part of the solution by using the power of their wallets,"



"Chicagoans can become part of the solution by using the power of their wallets," said Michelle Jost, head of the sustainable seafood program in Shedd

Aquarium's conservation department. "By making environmentally responsible buying decisions, we can support species that are abundant and form well-managed fisheries while giving those that aren't a chance to recover."

This successful weekend launched a continuing partnership between the PLITT Company and the Shedd Aquarium.

Monthly events held at the aquarium highlighting sustainable options have become increasingly popular with aquarium visitors. Several local chefs who wanted to showcase their commitment to the sustainable seafood movement offered visitors the opportunity to learn about individual species through interactive cooking demonstrations and sampling.

Combining Shedd's knowledge of how to communicate conservation issues with the PLITT Company's industry know-how allowed both parties to increase the value of their messages. The aquarium has established continuing programs such as dining events, educational public presentations, field trips and much more all which promote the importance of sustainable seafood. **UB**



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- 2. Corn prices hit fresh 10-year high - 2/23/07**
- 3. High Corn Prices Hit Home; New Demand for Ethanol Seen as Source of Increase - 2/6/07**
- 4. Expensive Corn Affects All Food Prices - 2/2/07**
- 5. Smithfield Foods Subsidiary Closes Plant - 2/2/07**
- 6. Rising Poultry Prices Relieve Producers - 2/16/07**
- 7. Ethanol Production May Raise Food Prices - 2/12/07**
- 8. Two Doctors Discover Formula That Kills Bird Flu Virus - 2/6/07**
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2. SCOM - Alaska crab pots all filled up, but with nowhere to go - 2/19/07
3. LN - 3 crab boats, processor Independence, trapped in ice floes near St. Paul - 3/29/07
4. SCOM - Suicide of prominent Thai Shrimp Producer leads to bitter accusations over Anti-Dumping impacts - 3/8/07
5. SCOM - Japanese buyers getting desperate in face of unprecedented U.S. crab demand - 3/9/07
6. BANR - Crab prices continue to trouble Japanese - 3/6/07
7. BANR - Poor Russian Barents Sea crab harvests likely to impact king crab market - 2/28/07
8. SCOM - Ocean Choice confirms FPI talks; Fate of company cast cloud of uncertainty over Boston show - 3/15/07
9. SCOM - Make Boston a 100% net weight show - 3/8/07
10. LN - Alaska's crab fishermen go prime time as viewers drawn to danger, new deadliest catch season - 3/26/07

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Ready-to-eat seafood is on the rise. So too, is the availability of these items. Although prepared, frozen seafood has been an option for consumers for years, fresh, ready-to-eat and fresh and frozen, ready-to-cook options now exist in the marketplace. According to Food Marketing Institute's 2006 survey of retail stores, 94% offered fresh, prepared foods.

The Uner Barry Reporter staff recently attended the International Boston Seafood Show and found a new ready-to-cook line of marinated tuna and mahi portions from Phillips Foods, Inc.

Representatives from Phillips explained that the new product is different because

"Phillips Foods and other suppliers recognize the demand for ready-to-cook seafood."

each portion is marinated with a flavor sheet—a technology referred to by their Corporate Chef, Dennis Gavagan, as Flavor Transfer Technology.

Gavagan informed the Reporter that Phillips was promoting this product as *Perfectly Seasoned Fish™*, and further explained that this marinating process is equivalent to the flavor a chef can create. He said the Flavor Transfer Technology is a precise way to not over- or undermarinate the product. Phillips also offers custom flavoring to the foodservice industry.

Foodservice suppliers are offering a variety of ready-to-cook options to the



industry and to retailers. Some of the available products include salmon fillets in a five peppercorn tea rub, salmon Wellington, tuna steak and wasabi panko, thai stir fry, scampi, as well as a growing variety of other choices.

Phillips Foods and other suppliers recognize the demand for ready-to-cook seafood. It is not only pleasing to the palate, but it also allows consumers to prepare restaurant quality flavors in their own home. Sellers of seafood have commented to the Reporter that although consumers like to eat seafood, many of them are not experienced in their preparation, so the products come as a welcome innovation. **UB**



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Meatless mania

In today's health conscious, label-reading consumer environment, quantity and quality are giving way to portioned, healthier alternatives in the American diet. One segment of the food industry in particular has positioned itself to take advantage of the growing trend towards healthier, low cholesterol dining choices—meatless meals. Driven by higher consumer awareness and tastier, yes tastier products, meatless meals are just the ticket for a significant and growing percentage of the U.S. population.

According to 30-year veteran of the meatless food industry, Jerry Colt, Vice President of Health is Wealth Foods, Williamstown, NJ; it isn't all about the hard core health crowd anymore. "It used to be that there was a little mom and pop natural food store that a very small, but dedicated, group of customers would

frequent. Whole Foods and other retail outlets like Wegmans have opened up new doors for the industry and the consumer has benefited with better price, taste and selection."



Although vegetarians make up a large part of the meatless meal movement, bottom line sales have been aided by anyone interested in all natural foods or all natural ingredients. Even kids are making up a growing portion of the consumer base and parents

approve of the lower fat, lower cholesterol meals meatless offerings provide. From meatless chicken nuggets to side dishes and snacks, companies like Health is Wealth are giving traditional dishes a real run for the consumer palate. "Some of our most popular offerings include southern-style mashed sweet potatoes, pot stickers, spring rolls and our spinach and cheese munchies," says Colt.

Other companies such as Gardenburger, Boca and Morningstar Farms are benefiting from growth in the natural, organic and meatless category as well. According to the Natural Marketing Institute's "2005 Health and Wellness Trends Report," retail sales of packaged natural foods and beverages grew 5.6 percent between 2001 and 2004, attaining \$11.3 billion. This same report finds that 95% of shoppers consider themselves "health active"—meaning that they select food for healthful reasons at least some of the time. 14% of the general population is either already vegetarian or "aspiring" vegetarians and another 30% occasionally eat meatless meals.

"...the consumer has benefited with better price, taste and selection."

With no signs of slowing down, product development will continue to play a crucial role in courting new consumers to the meatless aisle. Healthy offerings, tasty products and convenience will each contribute to growing consumer acceptance. "There is a new wave of growth going on," says Colt. "The consumer is realizing that good foods do make a difference in their health." **UB**

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Supermarket shopping methodologies

As virtually everyone shops in a supermarket for groceries and other household needs, it would stand to make sense that virtually everyone has their own preferences as to what items to buy, what brands to select, what sizes they require, and so on. Research shows that there are demonstrable “patterns” of shopping methodologies adhered to by consumers.

For the edification of its readers, Urner Barry's Reporter staff conducted a completely non-scientific and investigative process identifying the methodologies most often employed by supermarket shoppers.

1. THE ORDERLY LIST SHOPPER

The shoppers in this group construct their shopping lists to match the pattern in which they meander around the supermarket. As they traverse the aisles, they pluck items one by one, in an orderly fashion, from the shelves and place them in their cart.

2. THE RANDOM LIST SHOPPER

Shoppers here typically grab the list they have constructed from under a magnet on their refrigerator. Since the list has been created as they realize an item is needed or wanted, it bears no semblance of orderliness whatsoever and, therefore, neither does the way in which they scamper around the supermarket, grabbing the items on the list.

3. THE COMBO LIST SHOPPER

This group has a randomly constructed list, but attempts to acquire the items in an orderly fashion. Often seen with a pencil or pen in hand, or perhaps kept in a pocket protector, they furiously cross off items selected from all over their list as they attempt to display at least a modicum of orderliness to watchful observers.



4. THE LEFT-TO-RIGHT SHOPPER

Regardless of whether they have a list or not, these shoppers head directly for the left side of the supermarket, and go up and down each aisle in turn as they acquire necessary items for purchase.


5. THE RIGHT-TO-LEFT SHOPPER

Identical to the left-to-right shopper, people in this group begin their adventure at the right side of the supermarket. Thereafter, exhibited behavior is identical.

6. THE “MAGNET ITEM” SHOPPER

These people habitually start with one item, or grouping of items, they intend to buy. Always. Forever. Will Never Change. The item might be meat, produce, cereal, what have you. You get the picture. It has to be first! After this acquisition, they might demonstrate any, or portions of all, of the behavioral patterns previously described.

Our survey results indicated that 26 percent of respondents fell into each of categories 1, 2 and 3; 18 percent in category 4; and only 2 percent in either category 5 or 6.

We at the Reporter fully recognize that the listings contained herein may not be all-inclusive. They also may have not completely captured all regional behavior and flavor, and may have inadvertently omitted certain subsets of behavior which should, possibly, have been captured. Therefore, we welcome any and all input; feel free to contact us at reporter@urnerbarry.com. 



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A matter of taste and sensibility



Flavor is defined as "the quality of something that affects the sense of taste." You might be surprised to learn, however, that most flavors experienced in a given meal are mainly recognized through the sense of smell.

The complete art of recognizing flavor actually requires the use of both smell and taste. Humans, in their quest to continuously enhance the pleasures of taste, have found many ways

to flavor food. That being said, a market just for this purpose arose quite some time ago. Food processors and producers, along with flavor and fragrance companies, have

long been competing to please the taste preferences of today's consumer.

Before looking at what part the industry has played on this issue, let's first take a look at how taste and flavor work together. Taste can be best described as a sensation that results when taste buds convey information about the chemical composition of a soluble stimulus. Tasting allows us to determine if something is sweet, sour, spicy, etc. A "flavoring" is that sweet, sour, spicy, etc. substance added to food in order to change or enhance its taste.

There are several kinds of flavorings, but the two basic types are natural and artificial flavorings. Natural flavorings consist of extracting the flavoring substance from the source, while artificial flavors, in contrast, are chemical compounds added to either imitate or enhance a natural flavor.

Food companies employ flavor

companies to develop products to enhance the way a food tastes. These companies specialize in analyzing consumer preferences and trends in order to develop the actual flavoring. With consumer tastes and preferences changing all the time, flavor and food companies are constantly trying to keep up with consumers' demand.

"The complete art of recognizing flavor actually requires the use of both smell and taste."

Chinese, Mexican, Japanese, and Indian, just to name a few, are some of the ethnic influences currently shaping the food industry and the eating habits of the American consumer.

According to Javier Rubio, Chemical Engineer and former IFF sales manager for Mexico and Central America, another

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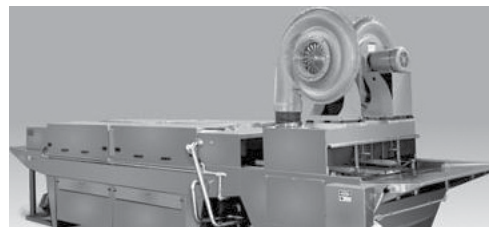
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trend influencing consumer taste is the environmental impact associated with products or their production. "Increasing environmental awareness and green demand is boosting the use of more and more organic and natural ingredients," said Rubio.

Market research group Freedonia shows consumer trends for 2007 are heading towards more authentic, yet complex, flavors and fragrances, and consistent growth in low-fat and low-carbohydrate foods and beverages continue to encourage the demand for flavors that will increase the appeal of these products.

There's no doubt that the need to enhance a product's taste will continue to be a fundamental rule in satisfying the consumer. In order to remain competitive, food companies will continue to work closely with flavoring providers so that they can expand product offerings geared towards the mainstream trends of ethnic, organic and nutritional foods in their quest to please the palate. **LB**



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The Recipe Box

Chicken Scaloppini & Lemon Butter Sauce

In a large skillet, heat a small amount of oil with two tablespoons of butter.

Dredge chicken in seasoned flour and sauté in pan, turning once until brown and cooked through. Remove chicken from pan. Add mushrooms and artichokes to pan and heat. Add chicken back to pan and keep warm.

In a separate saucepan over medium heat, combine lemon juice and white wine.

Bring to a boil and reduce by one third. Add the cream and simmer until mixture thickens, about 3-5 minutes. Slowly add butter, about 2 tablespoons at a time, until completely incorporated, whisking constantly. Season sauce with salt and pepper to taste.

Pour butter sauce over chicken and sprinkle with parsley. Serve over linguini. Serves 4-6.

Ingredients:

Oil to sauté chicken
2 tablespoons butter
for sautéing chicken
3-5 boneless, skinless chicken
breasts pounded thin
2 $\frac{3}{4}$ cups all-purpose flour
seasoned with salt and
pepper for dredging
2 4 oz cans sliced mushrooms
1 12 oz can
artichoke hearts sliced
1 pound linguini pasta, cooked

Lemon butter sauce

3 tablespoons fresh lemon juice
4 oz white wine
4 oz heavy cream
3 sticks butter
salt and pepper
parsley

Long-established meatpacker moving...

Historic Chicago slaughterhouse looking for a new location



Chiappetti Lamb and Veal Company of Chicago is looking for a new home. After four generations of providing customers with fresh American lamb and veal the family-owned slaughterhouse is feeling the pressure of lack of space and its surrounding area.

Dennis Chiappetti, President of Chiappetti Lamb and Veal said, "I'm

looking out the window at the rooftop of a \$500,000, three-year-old home. We didn't pick a residential area, a residential area picked us."

What started out as an occasional butchering of a lamb for family or friends, founder Fiore Chiappetti's small butchering operation became a business that soon developed into one of the largest lamb and veal slaughterhouses in the Midwest.

That was in the 1920s. Then, during the time period between 1940 and 1960 the company purchased buildings that would comprise its current home located in the Chicago stockyard section—an area that

was also home to the largest meatpacking district in the world.

When the stockyards closed in 1971, however, Chiappetti's business was still going strong, and still is today. The company employs over 130 individuals and slaughters an average of 3000 lambs and 400 veal calves per week.

Moving the operation will be no easy task. Dennis Chiappetti said he expects to find a new home in Chicago, preferably in an industrial park or on part of the old stockyards. He also said the whole process may take one to two years, but wherever he moves it will be "out of view and smell of homes and businesses." **UB**

"We didn't pick a residential area, a residential area picked us."



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Providing immigrants with a small taste of their homeland...

Ethnic grocery stores increasingly compete with mainstream supermarkets



It's no secret that big supermarkets or "super centers" have been gradually replacing local supermarkets and traditional mom-and-pop grocery stores during the last two decades. Good

advertising and store locations are proven keys to their success. What has made them the choice of today's consumer actually results from economies of scale. This rule, however, does not entirely apply to small ethnic grocery stores. It is within this market where ethnic groups and immigrants have been able to find a small taste of their native country's foods and products—for a small premium.

Although mainstream supermarkets like Shop-Rite or Wal-Mart are adding more ethnic products to their shelves, it hasn't been enough for many Asians. According to the U.S. census, the population of Asian and Pacific Islanders is up 200% since 1980, a hefty

increase, and savvy investors are paying attention.

Asian entrepreneurs—mostly Korean—have invested in importing many food items to the ethnic markets not only from their native country, but from all of Asia and some from Latin America. The result finds a very diverse group of shoppers including Hispanics, Caucasians, and African Americans, frequenting the aisles. With the cleanliness of any up-scale supermarket; ethnic grocery stores offer quality and freshness along with a large variety of products targeted to different ethnic groups and all at competitive prices.

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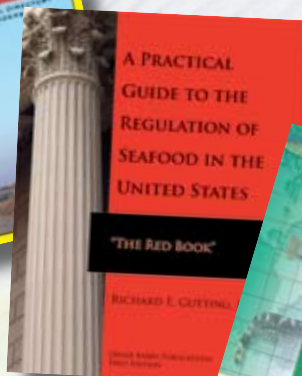
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A necessity for all those in the seafood trade

supermarket chains is Super H-Mart. After opening its first store two years ago, it now has 22 outlets across the United States. In a recent interview in the *Atlanta Journal Constitution*, John Lee, project manager for the company's expansionary plans, declared that he didn't consider having any competitors. "Our style is different from American groceries. It's even different from other Asian markets, which may focus heavily on food from one particular country," Lee stated. The NJ-based supermarket offers foods not commonly found in ordinary grocery stores such as rabbit, shank steak, octopus, ox-tails, beef stomach, yucca roots, seaweed and fruits like zapote to name a few.

Other supermarkets like Han Ah Reum, Grand Mart, Global Market and Lotte have taken Super H-Mart's lead and are expanding rapidly.

While mainstream American supermarkets have the difficult challenge of offering ethnic foods in their stores, Asian supermarkets face a different challenge.



They must accommodate the non-Asian customers if they want to survive; a point not lost on Lorrie Griffith, editor of the *Shelby Report*, a monthly grocery industry publication.

Ms. Griffith says that the greatest obstacle facing ethnic food markets will be to draw mainstream consumers into the packaged-food section, where the foods may be confusing or "intimidating" to non-Asian shoppers. But with the buying power of suburban Asian professionals doubling and even tripling in some metropolitan areas of the country, stores like Super H-Mart are ready for the challenge. They hope that attractive prices, fresh food and variety will earn them a solid reputation among Asian and non-Asian consumers alike. **LB**



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QSR dining —

Continued from page 1

bigger niche for themselves on the way.

But how long will current growth patterns hold? The restaurant industry anticipated sales of \$511 billion last year and experienced growth of 5%. However, with rising energy costs, growing disapproval for the war in Iraq and interest rate increases, 2007 faces more uncertainty and experts expect new unit development to moderate. At the same time these circumstances will likely keep consumers especially price conscious, benefiting the QSR and casual dining segment, and continuing to swell the ranks of Americans frequenting established icons and up and comers alike. **UB**



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Meat judging 101

You might not be able to judge a book by its cover, but what about meat? Is it possible to determine the quality of a cut of meat without tasting it? Apparently, each year a group of undergrads are convinced that they can do just that! Not only are the college students up to such a challenge, but they hold competitions against other schools in such an event. In fact, a whole group of coaches and assistants exist who prepare young individuals to be professionally trained "meat judges."

So, how are meat cuts graded or evaluated? And who decides if the beef, pork, lamb, and veal we eat meets industry standards? Led by the American Meat Science Association (AMSA), the Intercollegiate Meat Judging Program is an educationally-based series of contests among universities that prepares and educates young students to grade, evaluate, and ultimately "judge" the quality and the yield grading of several meat retail cuts and carcasses.

Top competing universities include Kansas State University, Texas A&M, Texas Tech, Oklahoma State University, University of Nebraska, Angelo State, Colorado State, Wyoming, Illinois, Iowa State, and the University of Florida among others.

Professor John Unruh from Kansas State University told *Uner Barry's Reporter* that, "Meat judging is valuable in developing young people in decision-making processes as well as critical thinking. It is also very influential since students are greatly exposed to the meat industry. Many of

today's meat industry leaders participated in these contests."

Meat judging started in 1926 at the Chicago Stock Show. It was directed by the General Manager of the National Livestock and Meat Board, R.C. Pollock. At that time, the contests were divided according to gender. Today, the judging is no longer separated between men and women, but is divided into divisions—junior and senior.

The junior division mostly consists of two-year schools while the senior division is made up of four-year schools. The competitions are also reserved for undergraduate students who only have one year of eligibility.

The culminating event of meat judging is the "International Contest," also known by some as the NCAA Championship of meat. Preparatory events for this are held mainly at sites that are known to have a significant presence of slaughterers and packers.

Another event that co-exists with meat judging is "live judging." The fundamental difference between the two is that the live contest is rooted on grading, evaluating, and "judging" livestock and breeding stock rather than inert retail cuts, cutouts, and carcasses. Most often, the two events are held separately, however, there is one contest which includes both livestock and meat judging—the "Meat Animal

"...the universities prepare for the so-called 'International contest', which is sort of the NCAA championship of meat..."



Evaluation Contest." Meat judging coordinator, Jim Wise, currently helps manage this event along with Oklahoma State University.

"The program gathers really top-notch students that, through competition, are motivated to make prudent decisions, think critically and ultimately defend their position...this will not only help them grade a carcass or evaluate a meat cut, but it will help them in their everyday life decisions and situations," said Wise. **UB**

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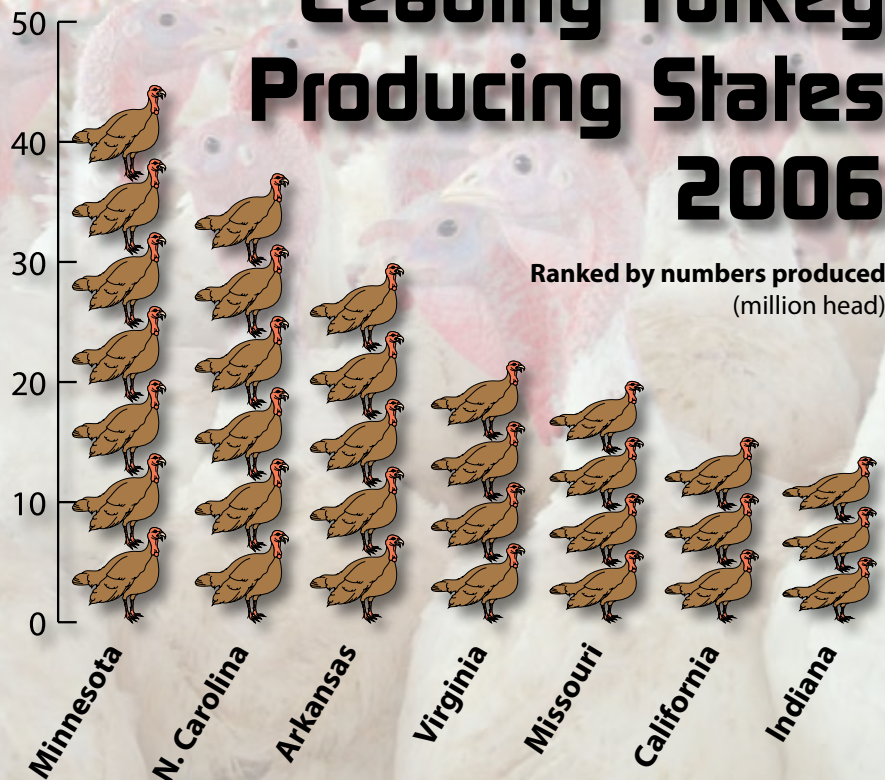
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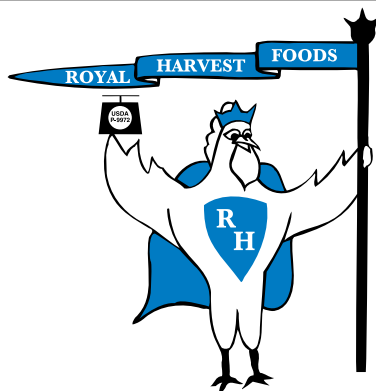
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Facility to bring new foods to life...

Tyson Foods opens discovery center

On March 6, 2007, Arkansas-based Tyson Foods, Inc. officially unveiled its new "Discovery Center," a research and development facility designed to enhance the company's ability to create new foods



and bring them to market more quickly.

"The Discovery Center is much more than a building," said Tyson President and Chief Executive Officer Richard L. Bond to reporters invited to tour the facility. "It's about our passion to create new products designed to meet the ever-changing needs of today's consumers."

"It's a hub of food innovation enabling

"It's about our passion to create new products designed to meet the ever-changing needs of today's consumers."

us to combine consumer insights with culinary and food manufacturing expertise to develop great-tasting chicken, beef and pork products," Bond added. "We believe there is no other research and development facility like it anywhere in the world."

The Discovery Center, which opened in mid-January, is located on the campus of Tyson's World Headquarters in Springdale, Arkansas. The 100,000 square foot facility is home to the food science and culinary professionals who are part of Tyson's Research and Development team. The Center includes 19 specialized research kitchens, a multi-protein pilot plant, a packaging innovation lab, a sensory analysis lab and consumer focus group capabilities.

"The Discovery Center is designed for joint value creation with our customers," said Hal Carper, senior vice president of Corporate Research and Development for Tyson. "Here our food innovation teams collaborate with customers to research consumer needs, then design and test new products and packaging. We can then produce products on a test basis in a real-life manufacturing environment." **U**

Adapted from a Foodmarket.com story which originally appeared on March 7, 2007

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Don't mess with Mother Nature...

Factors which impact quality grading

Long-term, ongoing research has yet to pinpoint how, why, and what affects the quality grading of cattle. While genetics seems to play the largest role, there still remains some mystery as to the "other factors" that potentially influence grading. The bottom-line concerning fluctuating quality grading of cattle may be, "Don't mess with Mother Nature."

When it comes to grading, certain facts do exist. Time-on-feed in combination with weather patterns will both have an impact on the quality grading. Below is a brief description of the role these two factors can play in the process.

On average, an animal entering the feedlot will weigh in the neighborhood of 550 pounds. The feedlot operator will

nourish this animal for at least 180 days, and some as much as 220 days, in the hopes that it adds the highly desirable

intramuscular fat. The goal here is to attain the best "finish" or "grading" of the animal.

Calves that enter the feedlots between August and November may have to endure harsh conditions such as cold, wind, snow and mud, all of which are factors that cause stress. During the winter months, animals make use of their internally stored

"Time-on-feed, in combination with weather patterns will both have an impact on the role these two factors can play on grading."

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fat to create warmth and energy, and unfortunately, by the time the cattle are ready for the sale barns they have most likely lessened their quality grade.

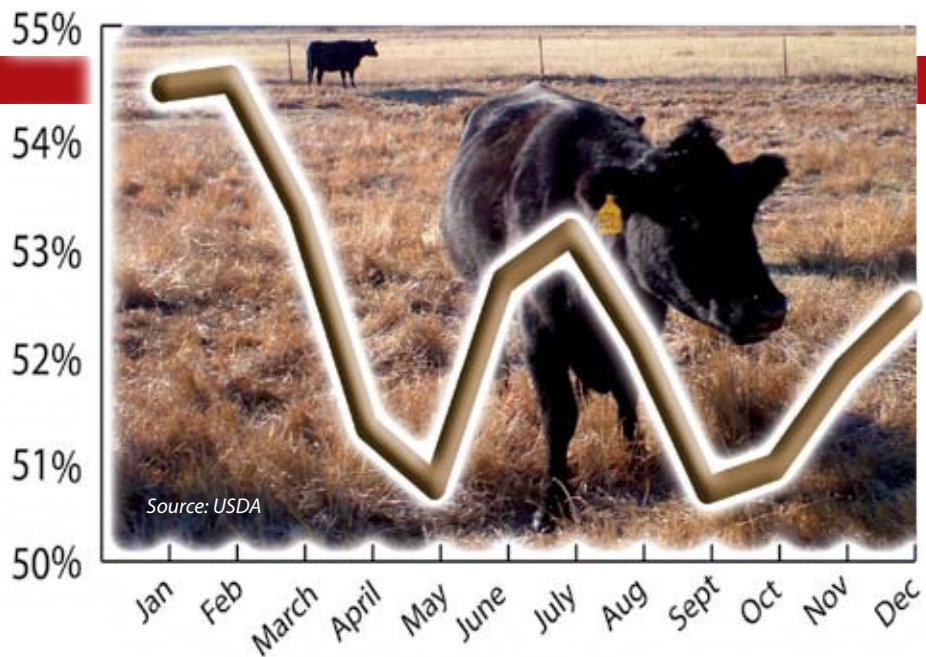
Weather also affects the cattle in the feed yards throughout the summer months. Hot temperatures and drought conditions in cattle producing regions also wear profoundly on the animal's ability to store the fat that consumers of quality beef desire. The summer of 2006 realized blistering temperatures and the absence of moisture, consequently leading to less than desired results for quality grading.

As spring arrives, the cattle owners/feedlot operators will analyze the cash markets and the potential to sell the animals for the best profit. The decision to maintain the animal on feed for the maximum time or to "pull them forward" will largely be dictated by market conditions. Cutting short the time on feed will also hamper the process of attaining the desired grading. Case in point, this past winter market had many "under

finished" cattle placed on show lists, as cattle were selling at a premium when compared to the past winter markets.

After many years of analyzing the growth and development of cattle as it relates to the quality grading of the animal, cattle industry analysts and scientists remain somewhat

puzzled. While genetics, nutrition, and supplements all play a part in cattle producers attempting to provide the consumer with quality beef that provides taste and tenderness, some things in life cannot be manipulated to provide the desired result. Perhaps when it comes to quality grading of beef, there's no arguing with Mother Nature. **UB**



Percentage of meat grading choice. 5-year average.

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International Boston Seafood Show: Another successful sensation

For over 25 years the International Boston Seafood Show (IBSS) has proved to be the largest seafood exhibit in the United States. It is the number one venue in North America where producers and consumers all come together to connect with the who's who in the seafood industry.

**"...one of the
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where the
products take
center stage..."**

This year, the 2007 event proved as successful as ever. Beginning on Sunday March 11th and continuing through the 15th, over 800 exhibitors were on hand to showcase their products.

As always, this three-day event teemed with excitement and enthusiasm. More than 2,000 people perused the convention center talking, sampling, and purchasing from vendors which were exhibiting a vast array of species, preparations and packagings.

The IBSS truly proves to be one of the few food shows where the products take

center stage with all types of designs, demonstrations and tastings.

Urner Barry Publications has exhibited at the IBSS for most of its existence, and this year our booth bustled with activity. Among some of the products and services that garnered the most interest were:

- A new Seafood Import Workshop Series featuring Richard Gutting and Mary Snyder. (See information below.)
- Urner Barry's various market price reports
 - Foreign Trade Data
 - The Commercial Guide to Fish and Shellfish
 - The Who's Who in the Fish Industry
 - Seafoodnews.com
 - All varieties of Wall Charts

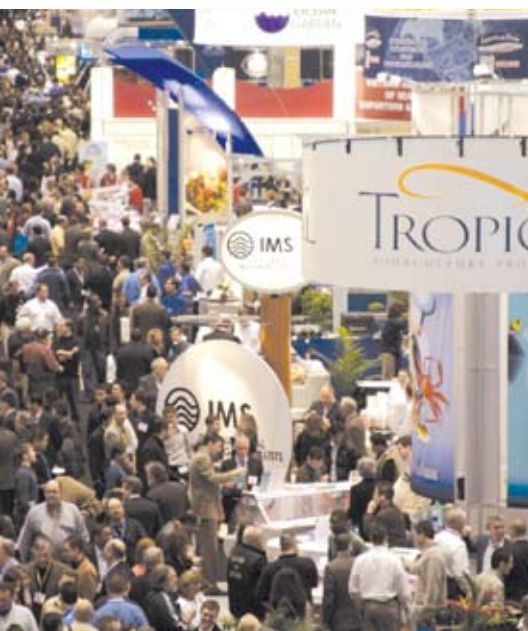
Make plans to attend next year's International Boston Seafood Show on February 24-26, 2008. **UB**



Urner Barry's booth bustled with activity at the show.



Frank Dulcich and Secretary Commerce Gutierrez at the Pacific Seafood booth. Photo by John Sackton, Seafood.com News



Aisles were crowded at the Boston Seafood Show. Photo by John Sackton, Seafood.com News

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Preferred Freezer Services exhibited across from the Urner Barry booth with their remarkable display of 22 seven-foot-high polar bears, each representing one of their cold storage facilities. Bears with hard-hats indicated a facility under construction. Photo by John Sackton, Seafood.com News



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Cobia: aquaculture's newest spawning

Acclaimed as one of aquaculture's future successes, cobia is quickly making a splash among consumers for reasons other than just taste.

Even though there are no targeted commercial fisheries, cobia has been farmed for over a decade for commercial consumption. Today, there is limited production of aquacultured cobia, with

much of it being raised in Asia (mainly Vietnam, Taiwan and China). It is becoming more popular as it is high in Omega-3s, has no fishy taste and it is easy to flavor.

Cobia is a fast-growing fish. In the open waters, landings of cobia are normally about six feet long and weigh about 80-100 pounds. Farm-raised cobia also grow quickly; reaching approximately 8 to 12 pounds in just one year. This is close to three times the growth rate of Atlantic salmon! In addition, cobia has a very low feed conversion ratio, which makes it quite attractive for aquaculture activities, and because its feed components are carefully monitored, there is no risk of mercury content.

Brian O'Hanlon, of Snapperfarm Inc. in Puerto Rico, began raising cobia on




his farm five years ago. Snapperfarm is the only open ocean, deep water cobia producer and the only cobia farm in U.S. waters. All others use traditional near shore surface cage systems in protected bays and lagoons, much like those used in the salmon industry.

"We produce a superior quality fish in the most pristine environment in the sea," said O'Hanlon.

Speaking with *Urnner Barry's Reporter* about being one of the first farms in the region to raise cobia, O'Hanlon said that the advantage Caribbean producers have over Asian producers is proximity to U.S. markets. Today there are cobia farms in Puerto Rico, Belize, Dominican Republic, Mexico and Martinique. Others are expected in Brazil, Panama and Columbia soon.

O'Hanlon expects 2007 to be a very productive year in terms of the volume of cobia produced in the Caribbean region. He said it has the potential to reach several hundred tons and may be as high as 500 tons. In 2008, O'Hanlon expects that number will more than double with production numbers exceeding the 1000 ton mark, he further added that the industry for farm-raised cobia is also expected to grow significantly between 2008 and 2009.

Over the next few years look for farm-raised Cobia to become increasingly available and popular in the market, as it has many attributes both producers and consumers look for: low production costs, fast-growth rate, low feed conversion ratio, high in Omega-3 fatty acids, great taste, perfect texture and tremendous versatility. 



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Out of the pot and into the limelight

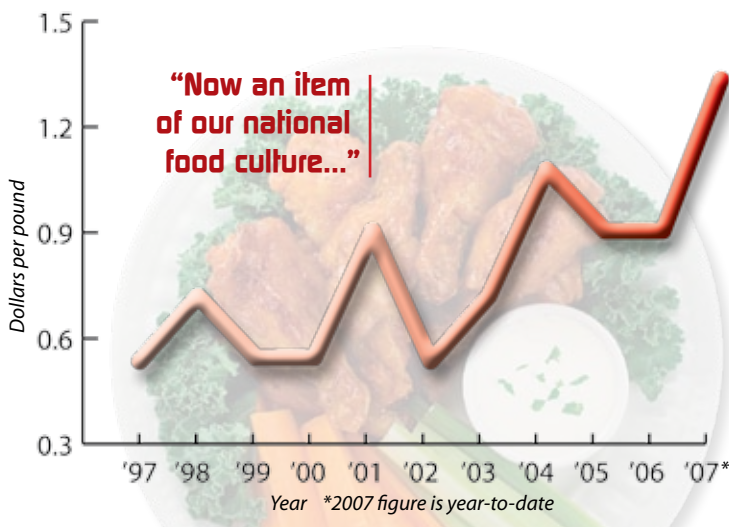
There was a time when dealers of commodity chicken had to beg buyers to take wings off their hands for a wing and a prayer, pun intended.

They were looked upon as a by-product and often found their way into the soup pot. The further processing revolution had yet to take hold and, not yet aware of the potential wings held in store for the industry, had a narrow mindset in developing a market that utilized them.

The transformation in the acceptance of the heretofore "by-product" can be traced back to the early 60s. The now famous Anchor Bar in Buffalo, New York, was the birthplace of

the "Buffalo Wing," a result of pure American know-how, or in other words plain dumb luck. The story has it that

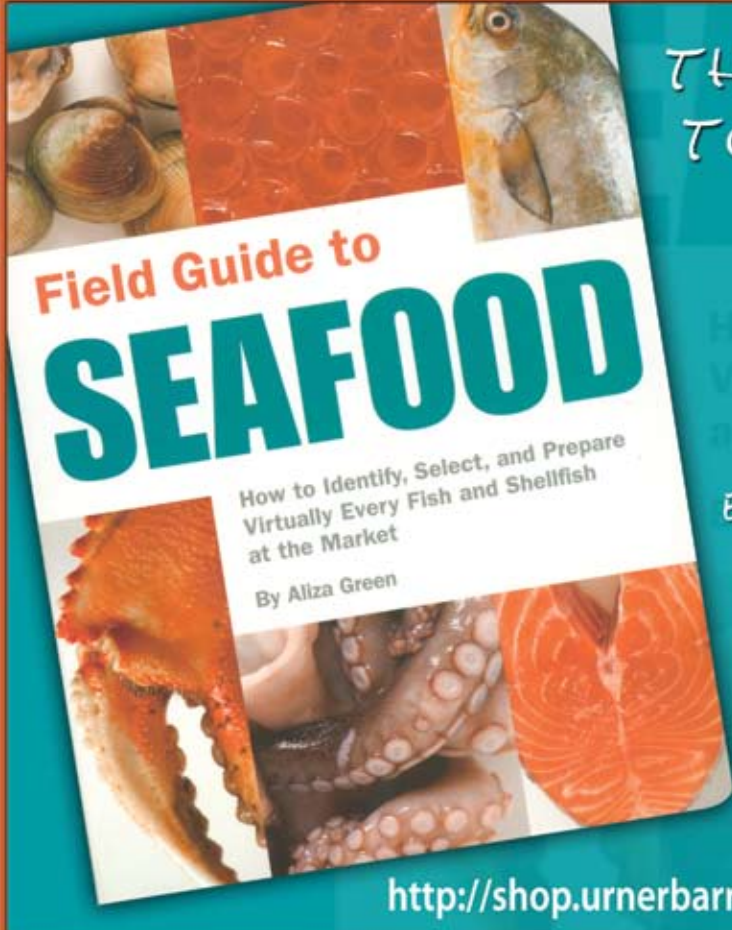
The growing popularity of the wing and its placement on restaurant and bar menus everywhere, has resulted in values experiencing steady advances during the past decade.




Dominic Bellissimo was tending bar one Friday night when a few friends dropped by with a big appetite. Dominic's mother,

Teresa, in short order was making chicken stock with wings and then improvised and whipped up two plates of wings that she deep fried and smothered with a secret sauce. The response was an instant hit, and to this day customers flock to the Anchor Bar to satisfy their craving.

As the chicken industry started to mature and technological advances became more widespread, the great "Buffalo Wing" stampede was on its way. Now an item of our national food culture, food service, fast-food, and retail outlets all stepped up to the plate and offered a



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variety of sizes and flavors, tantalizing the taste buds of Americans and changing the industry forever.

From a demand standpoint, the peak season for wings traditionally coincides with the start of football. Bar crowds and household gatherings usually have wings on the menu in some shape or form. Their popularity has blossomed into a year 'round marketing event for the chicken

industry. Since their inception in the early 60s, demand has had its increasing presence felt with wings on the menu almost everywhere. Chains like Wingstop and Buffalo Wild Wings have even gone so far as to make them their center-of-the-plate offering. Historical price points over the last ten years clearly illustrate their rise in popularity—ranging from a low of 40 cents per pound to an all time high of \$ 1.36 per pound realized this past year.

The Anchor Bar's phenomenon has truly brought good food and good fortune to the American people and the chicken industry since those few friends with a big appetite dropped by. If it weren't for Mother Teresa's Buffalo wing creation, not only would her friends have gone hungry, but one of America's tastiest treats, and certainly one of the chicken industry's greatest innovative successes, may never have come to be. **UB**

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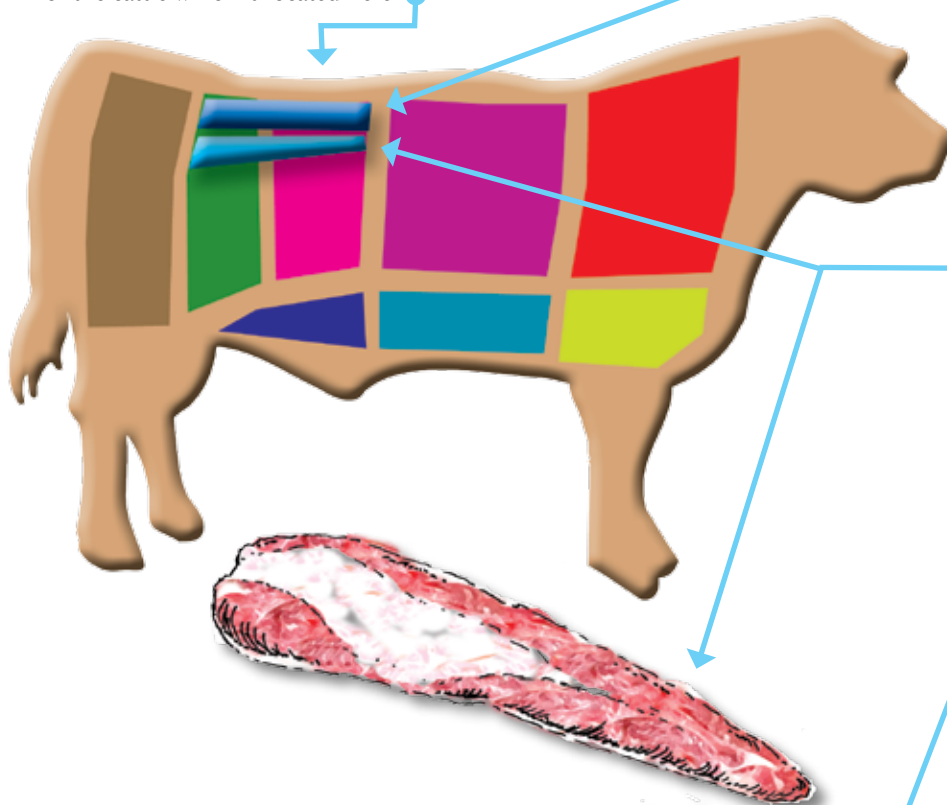
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Understanding the short loin

If you're not in the beef business, chances are you've never heard of the **short loin**. But if you're a steak eater, you probably enjoy short loins or its pieces. Let's take a closer look at the short loin.

Short loins run at about 22 pounds each. As the name implies, it comes from the loin of the cattle which is located here



Strip loin

The short loin, it is actually comprised of two pieces. The first element is the **strip loin**, which is commonly merchandised as a strip steak (also known as shell steak).

Peeled tenderloin

The second piece is the **peeled tenderloin** which is commonly sold as filet mignon. As you can see, the tenderloin is thick at one end and narrow at the other.

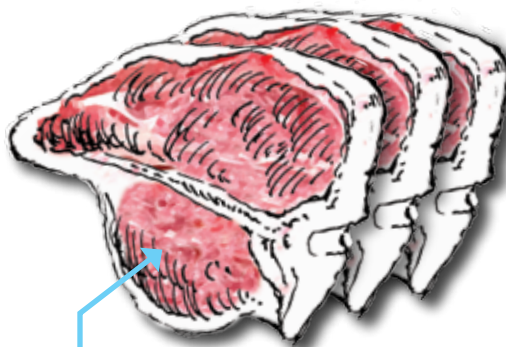
Porterhouse steak

When cutting the short loin from one end to the other, the first several steaks are known as "**porterhouse**" steaks, which contain a large part of the peeled tenderloin.

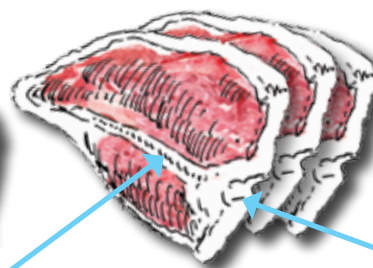
T-bone steak

The last several steaks are "**T-bone**" steaks, which consist of mostly strip loin with only a small piece of the peeled tenderloin tapering at the end.

Cuts of a carcass that come from the middle are referred to as "middle meats." They do less work on the animal and, consequently, they are more tender. The short loin is one of these cuts.



For a steak to truly be called a porterhouse steak, the **tenderloin** must be at least 1 ¼ inches in diameter.



On a short loin, the strip loin and the peeled tenderloin have the **back bone** at the top. The small bone that separates the strip from the tenderloin is called the "**transverse process**" together they look like a "T" which is why some of the steaks are called "T-bone" steaks.

Item placement is not haphazard...

The strategic placement of add-ons in supermarkets

There are innumerable "shopping methodologies" employed by patrons of stores and perhaps more so than others at food outlets or supermarkets. In fact, there are probably as many methodologies here as there are for selecting stocks, bonds or other investment instruments and the options prove just as staggering.

Just like a good car or clothing salesman, however, the various managers in a supermarket will attempt to "up sell" shoppers to help them decide to add items to their shopping carts on impulse regardless how disciplined the shopper may be.

Examples abound in retail outlets, even to the casual observer. Known sometimes, and certainly euphemistically, as "cross-

placement," this strategy appeals both to the sub-consciousness and completeness/thoroughness of the shopper, requiring them to make a "yes" or "no" decision, virtually on the spot, and without guilt.

Perhaps the placement of the "add-on" looks a mite errant (potentially giving the false impression that a shopper may have decided to place the items there, rather than return it to its rightful place in a different aisle) but, psychologically, it is there for its intended purpose and will be quickly replaced when acquired by a consumer.

Breakfast meats (bacon, sausage, pork roll) and hash browns near the eggs; cookies and chocolate syrup near the milk; catsup/ketchup and mustard near the hot dogs; salad dressings near the lettuce; crackers near the cheese; chips and pretzels near the soft drinks; cocktail sauce near the shrimp; parmesan cheese and tomato sauce near the pasta; charcoal near the meats; the

possibilities boggle the mind!

Food add-on placement is a tried and proven method to boost incremental sales and help make the purchase decision for the consumer. Foodservice operators also have been known to benefit from tactics similar to those practiced by their retail brethren. **UB**

"Food add-on placement is a tried and proven method to boost incremental sales."



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Protecting your health: FSIS's new risk-based inspections system

The United States' Risk-based Inspection (RBI) System is being overhauled for the first time in almost a decade.

In February of this year, the Food Safety and Inspection Service (FSIS) announced that in an effort to address the latest food safety concerns, certain processing plants that make products with a high risk for contamination and that have had past violations would face greater scrutiny. Slaughter facilities would not be affected. It is hoped the enhanced system will boost consumer confidence in the meat, poultry and egg products supply.

Richard Raymond, Under Secretary for Food Safety, said "We're just putting resources where the risk is greatest, and those plants that demonstrate excellent control will get less resources."

Total risk control value will be based on a scale of 1-100 with the lower values indicating better risk controls. Measures will be determined using information from previous enforcement actions, food safety recalls, verified food safety consumer complaints, public health significant compliance records, microbial testing program results, Ready-to-Eat (RTE) alternative designation and a Salmonella verification category.

FSIS has stressed that the initiative will not reduce the number of inspectors, as all processing establishments will still be subject to daily inspections.

"We're just putting resources where the risk is greatest..."



Food Safety and Inspection Service spokesman Steve Cohen indicated that the program will likely begin in the late spring or early summer of 2007. Upon inception of the program approximately 254 locations, or five percent of the nation's processing plants, will begin experiencing the new, stepped-up RBI system. It is expected that as many as 1,200 plants will be part of the new design by January 1, 2008. **LB**



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Bone-in filet

Continued from page 1

The evolution and success of such a high-end steak is thought to have originated with the pork tenderloin. Providers of steaks to "white tablecloth" style restaurants were asked to supply an item that delivered the utmost in taste and texture. The bone-in filet mignon is aged slowly for approximately 21 days to enhance the flavor and tenderness.

The bone-in filet mignon is processed from the short loin (IMPS #174). Instead of leaving the bone on the strip side of the short loin, it remains attached to the tenderloin. The feather bone, or more

commonly known as the chine bone, will stay with the filet mignon. The inclusion of the bone during the cooking process thereby enriches the flavor of the meat. The short loin, when fabricated to produce the bone-in filet, will only yield three restaurant-sized steaks. With the minimal yield and the hand labor to process, the bone-in filet commands a hefty price.

Should you find this scrumptious steak at a restaurant near you, certainly the bill for your dinner will reflect your taste in steaks. However, be assured you would be leaving the restaurant knowing you just experienced the best steak money could buy. **UB**

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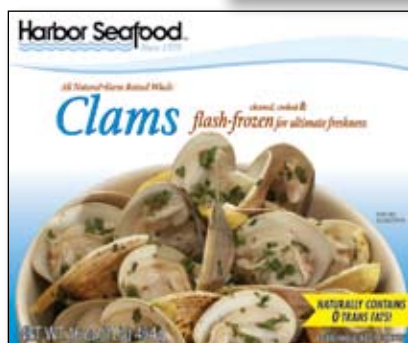
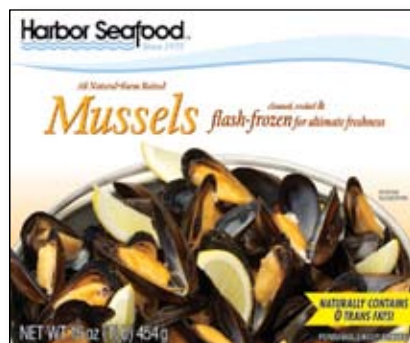
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