



Poised to achieve its full potential...

RARE Hospitality acquisition further positions Darden Restaurants as industry leader

Darden Restaurants, Inc., announced in October of 2007 that it successfully completed the acquisition of RARE Hospitality, operator of 287 LongHorn Steakhouse and 28 Capital Grille restaurants, for \$1.4 billion. Darden now operates over 1,700 restaurants including Red Lobster, Olive Garden, LongHorn Steakhouse, The Capital Grille, Bahama Breeze and Seasons 52. They employ approximately 170,000 people who help serve over 350

"RARE Hospitality's two outstanding brands and the talented leadership and restaurant teams behind them enhance Darden's entire organization."

million meals annually.

"The combined organization is strongly positioned to capture the long-term growth opportunity in full-service restaurants," said Clarence Otis, Chairman and Chief Executive Officer of Darden. "RARE Hospitality's two outstanding brands and the talented leadership and restaurant teams behind them enhance Darden's entire organization."

Darden's expertise in operations excellence, brand management and national advertising and real estate development will help RARE's brands more successfully



realize their national expansion potential. In addition, RARE has operating expertise that will benefit Darden's brands.

Gene Lee, RARE President and Chief Operating Officer, and the marketing and operations heads of the two concepts have agreed to stay on to help lead this new organization.

The spirit of cooperation...

Michigan Turkey: establishing a legacy

The summer of 1998 will be remembered as troublesome and ultimately transitional times for Michigan's contract and independent turkey growers. That was the summer when Zeeland-based Bil Mar Foods announced they were terminating slaughter operations—effectively leaving the state's farmers with no place for their birds. Almost

"The quality of our growers' birds has been long established..."

a decade later, Michigan Turkey Producers (MTP) has become one of the most technically advanced, efficient, and food safety prioritized turkey plants ever.

Urnner Barry's Reporter had an opportunity to visit the state-of-the-art facility this past October. On hand were President and CEO Dan Lennon and Commodity Sales Manager Chad Van Kley. Mr.

Leadership of LongHorn Steakhouse will continue to be provided by Dave George, who will remain its President and report to Drew Madsen, current President and Chief Operating Officer of Darden. The Capital Grille will continue under the leadership of John Martin, who will remain its President and report to Gene Lee.

Phil Hickey, RARE's Chairman and CEO, will also become an exclusive advisor to the company to help with integration and business strategy.

Headquartered in Orlando, FL, Darden anticipates that enhanced sales growth opportunities and meaningful cost synergies exist, driven by supply chain and purchasing integration, increased advertising effectiveness and consolidation



Michigan Turkey Producers' Sales Manager Chad Van Kley (L) and President and CEO Dan Lennon outside the company's headquarters.



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COVER STORY:

RARE Hospitality acquisition further positions Darden Restaurants as industry leader

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THE FASTEST WAY TO TASTE THE FRESHNESS FROM THE SEA

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PUBLISHER
Paul Brown Jr.

SENIOR EDITOR
Russ Whitman

MANAGING EDITOR
Joe Muldowney

CONTRIBUTORS
Janice Brown
Ken Coons
Liz Cuzzo
Greg Deppeler
Dave Herrick
Brooke Joensen
Jim Kenny
Linda Lindner
Bruce Longo
Angel Rubio
John Sackton
Jane Unger
MaryAnn Zicarelli

COPY EDITORS
Lynn Dekovitch
Linda Lindner

CREATIVE DIRECTOR
Glenn F. Juszczak

PRODUCTION MANAGER
Chris Ashley

ASSOCIATE DESIGNERS
Maria Morales
Gary Swarer

ADVERTISING
Janice Brown
Brooke Joensen

SUBSCRIPTION INFORMATION
800-932-0617



Tel. 732-240-5330
fax 732-341-0891
www.urnerbarry.com
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Cargill continues to "meat" consumer needs...

Asian style beef: the newest development in the food service industry

New trends in the food service industry indicate that healthy eating and dietary changes are going to take center stage. To identify this area of opportunity, Cargill Meat Solutions' team member Andrew Stanton created their newest development in the food service industry—Asian style beef.

Stanton is no stranger to the meat or food service industry. With over 40 years in the protein industry, watching products come and go, he spent the beginning of his career as a journeyman meat cutter.

As most careers take twists and turns, Stanton's was no different. After his meat cutting days he became involved with DPM, which was acquired by Cargill under the Excel brand in 1986, offering his expertise in product development. He is credited with inventing the first commercialized fajita meat, the "Beef Fajita Pita" ingredient and the first Beef Fajita for "Taco Bell", a trend that was so hot it revolutionized the Mexican food wave.

Stanton spoke with *Urnner Barry's Reporter* and said that as a result of following consumer trends he now sees Asian beef value-added products as the next big emerging product movement. He believes consumers are in search of smaller portions which are low in fat, but full of convenience.

The specially sliced beef protein creation easily absorbs the clean label, traditional base Asian marinade. These raw, domino-



shaped portions not only provide ease of handling, but they also offer the necessary amount of flexibility, thus allowing providers to explore a vast number of flavor profiles while at the same time providing boundless menuing possibilities.

Available as frozen five-pound flat pack packages in a convenient food service 10 pound case, the product delivers versatility and portion control. Because it is pre-cut,

it also minimizes prep time and maximizes handling ease. In the CVAM platform Stanton has developed the proprietary process that was specifically engineered to cut the domino shape strips as well as developing the recipe and the marination system.

Stanton's experience has him focused on delivering innovative products with extraordinary value and superior customer service. Over the next 10 years he believes the Asian style beef and similar line extensions will be the next big emerging trend. Look for this hot new product to roll out in the first weeks of 2008.

**"Consumers
are in search
of smaller
portions
which are
low in fat,
but full of
convenience."**

When east meets west and north meets south, Cargill's Cedar Canyon Asian Beef will be perfect for any food service outlet. **U**

The dollar is the 98-pound weakling of world currencies, but the bottom may be nearing

Contributed by

NAROFF ECONOMIC ADVISORS, Inc.

Joel L. Naroff, President and Chief Economist

The dollar, once the strongest currency on earth, is now weak and getting sicker. Yet few seem to be worried. And for good reason. While the faltering currency is putting cost pressures on importers and especially foreign producers, it is making U.S. products cheaper overseas and is working wonders for exports. But with the trade deficit narrowing sharply, it is unclear how much further the dollar will fall.

In just a little over six years, the dollar has dropped nearly 35% when compared to other major currencies, and nearly 25% against a broad range of currencies. It is down 42% against the Euro, 40% against the Canadian dollar and 16% against the Yen. No matter how you measure it, the buck has not stopped anywhere.

So why has the dollar lost all respect? Much of the reason has to do with the huge budget and trade deficits the country has been running. With all those dollars sloshing around the world, one would expect the value of the currency to fall. And it has.

But there are other reasons, some psychological and some economic. The Bush Administration has basically talked loudly about a strong dollar but carried a small stick. The Treasury Secretary has made it clear he wouldn't intervene in the markets and thus there is no floor for the dollar. Since government intervention rarely does more than slow the change in the currency, that policy made sense. But it did mean that speculators who bet on a weak dollar did not have to fear intervention.

More recently, changing economic

conditions have played a role in the dollar's decline. A softening U.S. economy, coupled with improving if not strong foreign economies, allowed investors to look outside the U.S. for investment opportunities. Declining interest rates also reduced the desirability of investing in the U.S. As a result, the demand for dollar related assets has eased and that has also put downward pressure on the currency.

How far will the dollar fall? There are competing forces at hand that make the outlook for the dollar less clear. The narrowing trade and budget deficits should help stabilize the dollar. But the possibility of significantly lower interest rates would be a negative.

What this says is that the dollar's near constant decline may be over. We could see

periods of strength as well as softness. And if the trade deficit keeps narrowing, we should expect the dollar to start rising.



Joel L. Naroff

Joel Naroff is chief economist and founder of Naroff Economic Advisors. He appears frequently on CNBC. Joel was named MSNBC forecaster of the year for 2006 and 2007 forecaster of the year by the National Association of

Business Economists. Mr. Naroff will give his economic outlook at Urner Barry's Executive Conference and Marketing Seminar this year in Las Vegas, Nevada in April 2008. **UB**

"More recently, changing economic conditions have played a role in the dollar's decline."

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The changing face of food packaging



Oscar Mayer's 'Fresher thinking for fresher bacon' ad spots feature their newly introduced Stay-Fresh Reclosable Tray.

If the question "what is the purpose of food packaging?" were asked of 10 people, it's likely that 10 different answers would be offered. Packaging food is not a simple task, although at one time it may have been an undertaking given very little thought.

The changing dynamics of consumer needs, demographics and time concerns pressure both package and food manufacturers to work in a mutually beneficial relationship which best satisfies ever-evolving requirements.

So what are the multi-faceted purposes of modern day food packaging? They include such reasons as:

1. To protect the food, especially perishables, from the elements.
2. To convey an attractive and appealing sense to consumers.
3. To allow the product contained within to be viewed to its best possible advantage.
4. To facilitate maximum display capabilities within the retail outlet.
5. To permit the product to be immediately recognizable when stored in a home refrigerator.
6. To preserve the "freshness" of the food for as long as possible.
7. To maximize convenience in the acquisition, storage, and preparation of the contents.

Like the many purposes of food packaging, food and food packaging industries are being shaped by specific "drivers." At the top of the list, spurred on by the generation known as the Baby Boomers, is aging population. The second driver, which is at least a partial overlap to the first, is the overall proliferation in one and two person households. These include not only the Baby Boomers, but also people domiciled with "significant others" and young people recently out of school rooming together. The third is the busier-than-ever lifestyle virtually everyone is experiencing and which generates the need for a quick but tasty and wholesome meal.

Given these influences, it's easy to see

why food packaging is a challenging undertaking. It presents the food and food packaging industries with problems driven by the dynamics of change in the end-user marketplace and adaptation to these "drivers" is, itself, constantly evolving.

One of the earliest responses was the proliferation of offerings designed to replicate the appearance and taste of a home-cooked meal, while at the same time offering the convenience of fast-food fare. A typical example being that of a whole, roasted chicken, available in almost any supermarket. Others more recently introduced include (but are not limited to) boil-in a bag individual servings; re-sealable packages of items such as bacon and lunch meats; pouches containing a built in handle for portability; and packages which will turn color after a "use by" expiration date has passed.

Ron Boedart, a food expert of some renown at the Jersey Shore, said in a recent interview: "...food packaging, like individuals these days, must be multi-tasking. It must first possess consumer appeal, or else it doesn't get to first base. After that, its

properties should be visually apparent and functionally beneficial: portable, easy to use, clean, offer transparency for product visibility, be user-friendly, and so on...". Doug Emich, Executive Chef for Englehard Industries, concurs, but opines that food packaging "...must offer maximum utility to the end-user. It should make the tasks of purchasing and preparing as rewarding, simple, and efficient as possible".

Consumer demand is changing. The food and packaging industries must continue to respond, by offering packages and contents that are safe, convenient, functional and in tune with the moving requirements dictated by the consumer marketplace. **UB**

"It (food-packaging) should make the tasks of purchasing and preparing as rewarding, simple, and efficient as possible."

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Getting a little fishy...

The world is hooked on fish



Americans in search of a healthier lifestyle and diet may find it swimming right in front of them. According to a survey by the National Oceanic and Atmospheric Administration (NOAA), in 2006 Americans consumed 16.5 pounds of fish per person, and 4.9 billion pounds overall. These booming numbers are largely due to the growth of imported farmed fish and shellfish. The United States imports about 80-83%

of seafood Americans consume each year and of that percentage at least 40% is farmed.

"The U.S. imports about 80-83% of consumed seafood each year."

The benefits to a diet rich in seafood are vast. Seafood is filled with Omega-2 and

Omega-3 fatty acids, which have now been proven to improve mental health, fetal infant development, heart and vascular health, vision, and respiratory problems. The American Heart Association advises that eating fish just twice a week can reduce the risk of dying from a heart attack by 36 percent. These findings are all key reasons why people are consuming so much more seafood today than in years past.

Even though the United States seafood consumption numbers are rising, we are still a small fish in a big pond. The U.S. doesn't even fall into the top 10 countries for seafood consumption. The top 5 per capita are: #1 Maldives, an island nation off the coast of India just southwest of Sri Lanka; #2 Icelandic, which includes

Iceland, Greenland, Denmark, and Norway; #3 Kiribati, another island nation located in the center of the tropical Pacific Ocean right over the equator. The soil is extremely thin and very bad for agriculture, so fishing is their major source of income; #4 Japan and #5 Seychelles, an archipelago off the coast of Africa in the Pacific Ocean which is made up of a total of 155 nations.

Not only is seafood beneficial to one's health, but it also gives the economy a nice boost. Dutch Harbor in Alaska has clinched the title as the USA's number one port for the 18th year in a row! It is also Alaska's number one business. If the seafood trend keeps up, you may find yourself being asked "would you like a side of shrimp with that?" **LB**

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Brazil's poultry industry on the rise

After stagnant growth in 2006, poultry production in Brazil is bouncing back. Current figures are surpassing analysts' projections and production is expected to end above strong estimates made earlier this year. At the core of the rebound is an increase in exports, strong domestic demand, and results from heavy investment in the Brazilian poultry industry.

At the beginning of 2007, estimated broiler production growth was set at 5%, from 9.4 to 9.8 million metric tons. By October of 2007, USDA and Brazilian authorities revised the estimate and projected a new figure between 10.1 and 10.3 million metric tons—a 10% increase from 2006. For the first half 2007, Brazilian chicken meat exports were 28% higher than year ago levels. Revenues experienced a 54.6% increase during the same period.

So after a declining year in exports and stalled production, one might wonder why this sudden surge. First, we must remember that consumer spending is the strongest driving force to sustaining a market economy. With real income increasing by more than 5%, Brazilians are left with more disposable income. Chicken meat's competitive pricing advantage to other proteins has it benefiting the most. Second, international markets are demanding more chicken meat from those countries that are free from disease—Brazil being one of them and representing 41% of the total global trade.

Additionally, strong foreign investment is resulting in increased production capacity. Tyson Foods has recently announced the

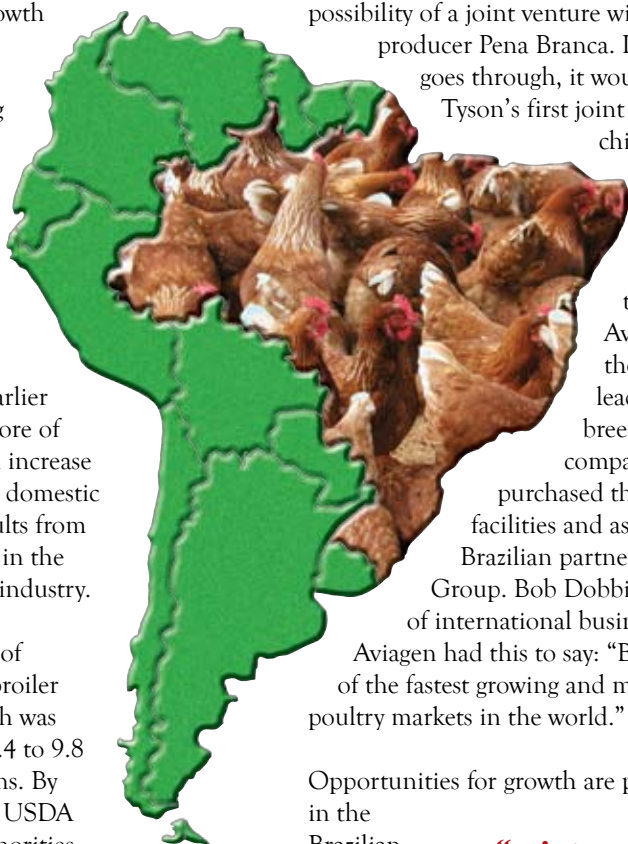
possibility of a joint venture with Brazilian producer Pena Branca. If the deal goes through, it would be Tyson's first joint venture chicken processing facility in Brazil. Earlier this year, Aviagen, the world's leading poultry breeding company, purchased the breeding facilities and assets of Brazilian partner Agrocere Group. Bob Dobbie, president of international business at Aviagen had this to say: "Brazil is one of the fastest growing and most dynamic poultry markets in the world."

Opportunities for growth are present in the Brazilian poultry industry. However, Brazilians must first confront and solve several constraints that could harm the industry's potential. For instance, the market must overcome high production costs that are directly derived from higher

"...international markets are demanding more chicken meat from those countries that are free from disease."

commodity prices. Competition for corn is fierce, especially with growing ethanol production, despite Brazil's strong production levels of corn and soybean. Second, funds for the National Plan for Prevention of Avian Influenza and the control of the Newcastle Disease must be released as promised by the Brazilian government a year ago. Third, further appreciation of the Real relative to the U.S. dollar could negatively impact packers' profitability, and therefore, other markets must continue to be sought. Finally, new access constraints in the European Union could threaten the current high level of exports.

Growth in the Brazilian poultry market in 2007 is imminent. Strong global demand and higher prices are signaling producers and investors that it's time for expansion. Yet in order to fully realize its potential, Brazil will first have to overcome several constraints. **UB**



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Flavor and fare from Chef Todd English

Chef Todd English is an extremely decorated, respected and charismatic chef known throughout the world. He is also an accomplished restaurateur, author, entrepreneur and television star.

Nine years ago, Todd English paired with the National Turkey Federation as part of its Chef Cooking Demonstration on their Web site, Eatturkey.com. There, 30 celebrity chefs from across the country provide visitors with interactive discussions and cooking demonstrations.

With a host of honors having been

bestowed upon him, English's recognition in the food and restaurant industry is prestigious. He has been honored by the James Beard Foundation, as well as by

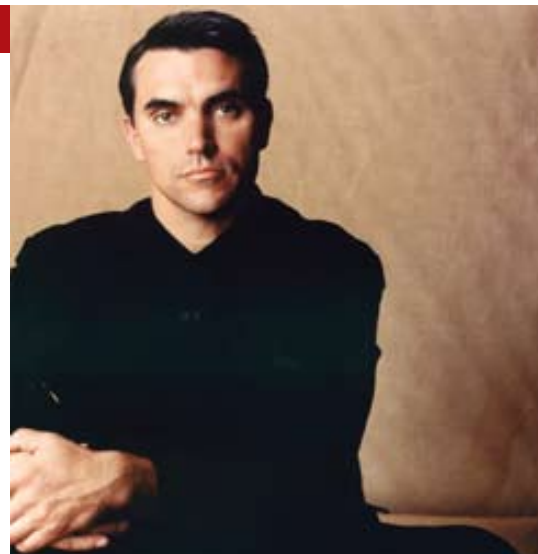
People Magazine's 50 Most Beautiful People. Also to his credit is an award for establishing one of the best-known

restaurant brands in the nation. English has published three critically acclaimed cookbooks, and was the

first recipient of the Robert Mondavi Award for Culinary Excellence.

Born in Texas and growing up in Georgia, he entered the Culinary Institute of America when he was 20 years old. Upon

TURKEY
the perfect protein.



graduating with honors in 1982, he apprenticed in fine restaurants in New York, France and Italy, which greatly influenced his work. He returned to the States when he was 25 and opened the award-winning northern Italian restaurant, Michela's, in Cambridge, MA.

Since then English opened a host of other restaurants with "Olives" in Charlestown, MA, being one of his most famous. Since its early beginnings, the 49-seat storefront restaurant instantly drew national applause for English's Mediterranean-style cuisine.

In an interview with the NTF, English says that Italy is where he really found himself. "The area's rich resources and agriculture, as well as its French, Arabic and Italian influences, makes the cooking very interesting," he said.

According to English, the Italians find turkey to be a popular choice in their menus "it is a healthy, light meat that lends itself excellently to their style of cooking, and they use it in many different ways. Also, Italians do not celebrate Thanksgiving so they perceive turkey as an all-year round option."

"Also, Italians do not celebrate Thanksgiving so they perceive turkey as an all-year round option."

English, and a host of other famous chefs on the NTF's Web site, view turkey as a truly perfect protein as its versatility proves itself over and over to be a great value to foodservice and restaurants and an ideal complement to any meal. **UB**

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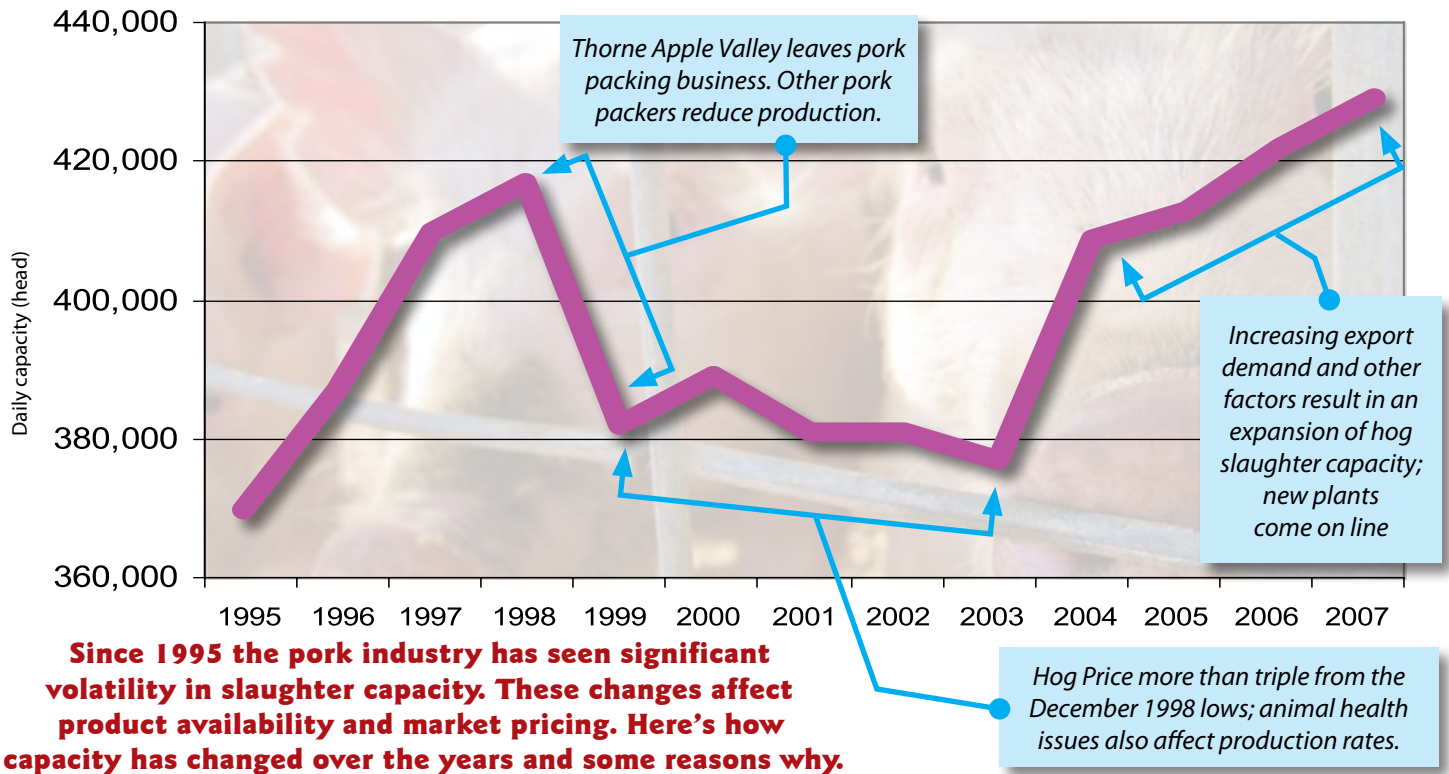
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The fourth most abundant mineral in the body, magnesium is essential to every cell as it is involved in the synthesis of protein and the way it assists in the functioning of certain enzymes in the body. It helps with the formation of bones and teeth and aides in the absorption of calcium and potassium.

Magnesium also helps in keeping your heart and liver healthy and it is essential for strong bones and good muscle function. 50% of total body magnesium

is found in bone. The remaining 50% is found inside cells of body tissues and organs. Only 1% of magnesium is found in the body's blood, however, the body is continuously working to keep the blood levels of magnesium constant as it helps to regulate blood sugar levels, and promotes normal blood pressure.

Magnesium works in conjunction with vitamin B12 and may prevent calcium oxalate kidney stones. It is said to prevent depression, dizziness and muscle twitching. It can help prevent cardiovascular disease, osteoporosis and certain forms of cancer and may reduce cholesterol levels. It is best taken with calcium, iron, B group vitamins



and vitamin E.

Toxic symptoms from increased magnesium intake are uncommon because the body eliminates excess amounts. A deficiency in this mineral is very rare but can occur in alcoholics or people whose magnesium

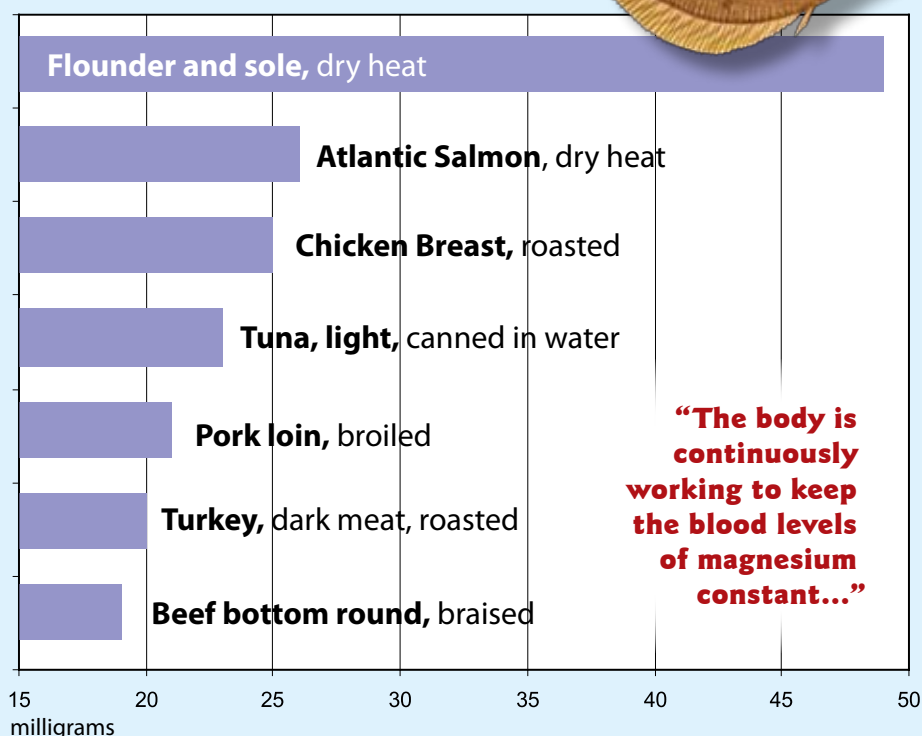
absorption is decreased due to surgery, burns or problems with malabsorption.

The Recommended Daily Allowance varies according to age.

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Males >30 years - 320 mg
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Females >30 years 320 mg **US**

Magnesium Content

Per 85g serving. Source: USDA



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The “other” other white meat: **black chicken**

The Black-bone silky fowl, otherwise affectionately known as the Silkie, is a species of bantam chicken that sports an abundance of snow white feathers that lack barbs and are therefore as soft as silk. Underneath their pallid, fluffy appearance is bluish-grey colored skin which covers the bird's black meat and black bones. Only the Silkie chicken and a few other rare Asian breeds have this unique black meat.

Legend and folklore surround the Silkie. One, in particular, describes it as a mythical creature that could alter states between seal and poultry form—thus explaining the bird's black meat. While the actual biological origins of this bird are not known, the Silkie is believed to come from eastern Asia as Marco Polo is reported to have exported some birds from China at the

end of the 13th century. Today, many are said to be bred in California, New York and other American states where there is a large Chinese immigrant population.

China has prized the Silkie for its medicinal value for centuries as it has been known to ward off the effects of

aging, improve muscle strength and has been used to boost the body's immunity. More recently, the fowl has been receiving press hailing it as a new form of “super food.” It has been reported that Chinese scientists studying these birds have confirmed their meat and bones contain high levels



of a substance called carnosine. Carnosine is a powerful anti-oxidant used to treat diabetes, anemia, post-partum depression and used to alleviate the effects of autism and diabetes. In the West, carnosine is taken as a dietary supplement.

The Black-bone silky fowl is growing in popularity because of the expanding Asian communities and because of the meat's benefits. But how does it taste? Reportedly, it is a deeply flavored, lean tasting free-range chicken with more flavor than other well-known domestic breeds. Unfortunately, its unusual color may make some people hesitant to eat it. Only time will tell if America is ready for black chicken nuggets!**LB**

“[the Silkie] is a mythical creature that could alter states between seal and poultry form.”

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The science of cooking

Perhaps more than anything else, the way our food tastes to us has a direct affect on our willingness to eat it.

So what is it in a steak that gives it a “steak flavor”? Why does a ribeye steak taste different than a prime rib? After all, they come from the same cut of meat.

The answer lies in something called the Maillard reaction (some people call it the browning reaction). The reaction is named after Louis Camille Maillard who first explained the phenomenon of the reaction between proteins and carbohydrates when meat is cooked at high temperature.

“In its raw form, sugar and protein in meat peacefully co-exist.”

In its raw form, sugar and protein in meat peacefully co-exist. However, high heat on the grill makes the proteins and carbohydrates react and combine to form an outer crust on the steak. This same reaction is also responsible for changing the aroma, flavor, and turning the outside of the steak brown. Because the temperature on the inside of the steak is not as high, it does not experience this same reaction. Similarly, the temperatures at which a prime rib is cooked in the oven are too low to generate

the Maillard reaction. Consequently, it tastes different. Scientists in the 1940s and 1950s discovered that the Maillard reaction

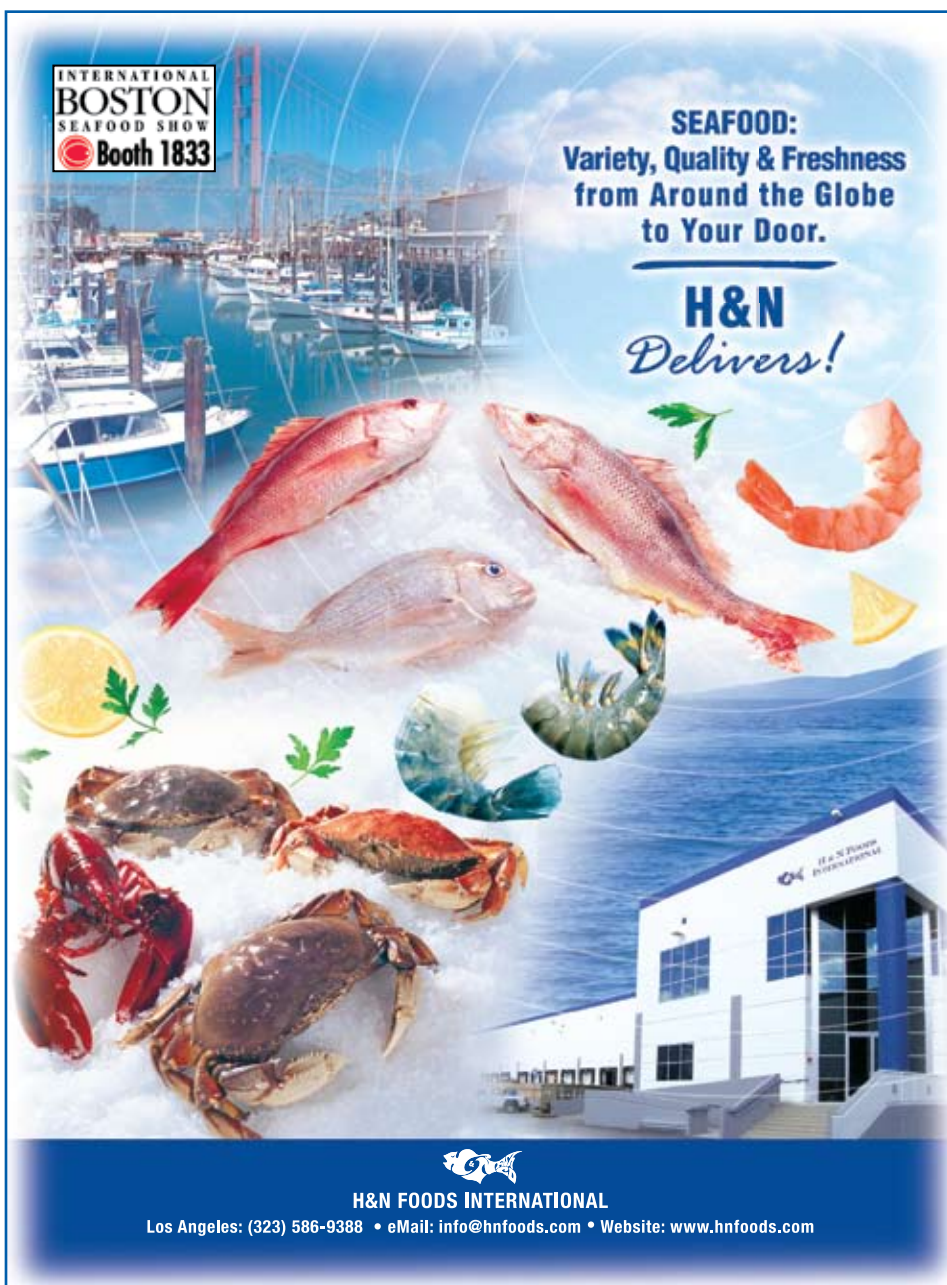
played a huge role in creating flavors and aromas—as many as 600 components have been identified in the aroma of beef!^{UB}



UB Fast Fact

In addition to steak, the Maillard reaction is responsible for the outer crust of bread.





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U.S. exports up 40%...

Russia: The “cold peace”

U.S. exporters to Russia have been enjoying tremendous growth in the last several years. According to data released from the International Trade Commission, the value of U.S. exports to Russia rose nearly 40% between January and June of 2007 when compared to the same period the previous year. Industries benefiting from this growth include automobiles, poultry and machinery.

Historically, Russia has been the U.S.’s largest broiler export market. According to recent data, this still appears to be the case. Exports to Russia in June 2007, totaled 209 million pounds. The outlook for the remainder of 2007 still looks promising. However, the market has been changing ever so slightly that results for 2008 exporters may be altered.

The number one problem facing U.S. exporters is the delisting of U.S. poultry



▲ Container terminal at Russian port Vladivostok

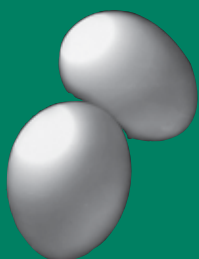
plants due to concerns regarding food safety issues. The lack of protocol on the part of the Russian Ministry of Agriculture in re-establishing these plants seems to indicate that they are at once restricting foreign trade and protecting Russia’s domestic broiler industry, leading to the U.S.’s next potential growth obstacle—Russia’s domestic broiler market. During the mid- to late 1990s Russia’s broiler production shrunk to record lows mainly because of tight grain supplies. Companies went bankrupt and factories closed. U.S. exporters stepped up and in to fill the demand.

domestic products. Capital was invested in the poultry industry which included the building of efficient western-style production facilities. As a result, poultry production in Russia is now growing at a rate of 20 percent per year. With this increase in domestic production it is believed the market will eventually become saturated. Together with increased competition from Russia’s domestic market and their restrictions and general lack of openness, many U.S. poultry companies have turned away from Russia.

After the 1998 financial crisis, however, the Russian government’s mission was to replace imported foods with

As Russia’s accession to the World Trade Organization moves forward, only time will tell if this will give U.S. exporters firmer ground from which to trade. **UB**

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Russia / U.S. comparison



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COASTLINE	79,400 km	19,924 km
POPULATION	141,377,752	295,734,134
LIFE EXPECTANCY	69.87 years	77.71 years
GDP	\$733.6 billion	\$11.75 trillion
GDP (per capita)	\$12,200	\$40,100
AGRICULTURE AS A %GDP	5.3%	0.9%
AGRICULTURAL PRODUCTS	grains, sugar beets, vegetables, fruit	fruit, wheat, corn, grains, poultry, beef, vegetables
LABOR FORCE	73.88 million	147.4 million
UNEMPLOYMENT RATE	6.6%	5.5%
POPULATION LIVING BELOW POVERTY LINE	17.8%	12%
OIL PRODUCTION / CONSUMPTION	9.4 / 2.5 (million bbl/day)	7.8 / 19.65 (million bbl/day)



▲ USDA Secretary nominee Ed Schafer

Who is USDA secretary nominee Ed Schafer?

Bush's judicial nominees. In fact, a 2003 report from the Congressional Research Service found that more than 99 percent of Presidential nominees are confirmed by the Senate.

Schafer's appointment would be great news for North Dakota. At the very least, it would mean a secretary of agriculture with knowledge of the issues facing farmers there. He was a popular two-term governor who was well connected with the people and the halls of power. He is aware of the role rural America plays and the problems it faces and can be a solid voice for those who are such a large part of the population which feed much of the world.

Schafer said during his nomination ceremony that his top priorities included

enhancing the nation's agricultural economy, advancing renewable energy, protecting the nation's food supply, improving health and nutrition and conserving natural resources.

Having the duties of the Secretary of Agriculture bestowed upon Ed Schafer would certainly be a bonus for America's livestock producers as he would admittedly work hard toward getting a fair shake for them all, it would also be one in which many officials have already expressed their confidence, including President Bush himself. **UB**

"(Schafer) is aware of the role rural America plays and the problems it faces..."

On September 20, 2007 Chuck Conner assumed the position of Acting Secretary of Agriculture as Mike Johanns stepped down in preparation for a run for U.S. Senate. Normally, the "acting" official is an intermediary individual and someone else is appointed to the position. Many were under the assumption that the White House was likely to look inside the Agriculture Department for Mr. Johanns' successor and had strong theories supporting why Chuck Conner would be the man. On October 31st of 2007, however, President Bush nominated former North Dakota governor Edward Schafer for the post.

Schafer served as governor of North Dakota from 1992 to 2000. He has been referred to as a "natural" candidate for the post as his farm roots and experience as governor of a state where nearly a quarter of the workers hold agricultural jobs, highly uphold his qualifications as the correct man for the job.

More than likely, Schafer's nomination will be confirmed by the Senate, as it has only blocked 2.3 percent of President

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Homegrown proteins find broader consumer appeal

Idaho potatoes, Alaskan salmon and Wisconsin cheese are regional food stuffs that, for today's consumer, are often well-established household names. But what about Pennsylvania beef, New Jersey turkey or Maine pork?

Locally grown produce has always had a soft spot in the hearts of American consumers. Frequenting a roadside produce stand or going to a u-pick farm in many parts of the country are time-tested traditions. Thanks to small local suppliers and associations, locally grown proteins are

joining the ranks of vegetables and other produce in today's consumer diet.

Successful companies are carving themselves a small niche in the growing locally raised protein sector. Because of improved distribution and advancing demand, today's consumer has a number of options when seeking locally grown food. Increasingly, locally grown and harvested products can be purchased directly



from the farmer at Farmers Markets, Farm Stands, U-picks, and by joining a Community Supported Agriculture (CSA) farm. Regional retail outlets also carry locally raised food products.

For the restaurant or institutional buyer, however, purchasing locally grown food isn't always easy. Obstacles to purchasing directly from a farmer or rancher and the convenience of ordering from a foodservice distributor can easily stifle distributive growth potential.

"When people buy from a farm or farmer's market they know where the food is coming from..."

In a survey, conducted for the USDA by the University of Nebraska, distribution and delivery concerns were ranked number one by HRI buyers when asked what obstacles are the most challenging or difficult to overcome in purchasing locally grown food. Reliable supply, pricing, knowing what products are available and complications with ordering rounded out the top five responses. Positive influences in purchasing locally grown food from that same survey suggests that product freshness, consistent quality, food safety/

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Increasing consumer demand for locally raised, grass fed Angus cattle (above) along with other locally raised proteins, may become a common sight along with the more traditional, locally grown fruit and produce, at roadside farm market stands (left).

wholesomeness and product knowledge play heavily when an institutional purchase decision is made.

Institutional purchase decisions are largely consumer driven, and the appeal of locally grown food to the consumer is unmistakable. So what is it about local proteins and produce that is so attractive to consumers? According to a report

published by the Leopold Center for Sustainable Agriculture, the Truck Weighted Average Source Distance (WASD) for the continental United States is 1518 miles. This is the distance food travels from where it is raised or grown to where it ends up being purchased by an end user. Simply put, today's consumers are showing preference for purchasing locally and don't want their food being trucked long distances. When people buy

from a farm or farmer's market they know where the food is coming from and often who is selling it to them.

Pennsylvania beef or Maine pork may not become household names anytime soon but the move towards eating locally raised produce and proteins is an undeniable trend that looks to be taking root in the consumer diet. **UB**

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Urner Barry hosts 'Seafood Import Workshop'



"Our objective is to improve compliance. Today, buying the wrong product, or buying the right product from the wrong supplier, can cost you thousands of dollars in unexpected tariffs or penalties."



Mary Snyder



Richard Gutting, Jr.

Throughout 2007, Urner Barry hosted a series of Seafood Import Workshops across the country. All venues are attended by sell-out audiences consisting of varied individuals within the seafood industry.



Well-engaged attendees learn about product specifications, classifications and databases, supplier agreements and audits, and entry checklists. With the same objective in mind, which is to learn about the regulations of importing seafood into the United States, many commented that the information provided is not easily obtained and they were happy to have the opportunity to gain this knowledge from experts.

The workshop is presented by Richard Gutting Jr. and Mary Snyder, who are well-known experts on importing seafood with first-hand working knowledge of agency requirements and compliance policies. Both have conducted seafood workshops in the United States and around the world.

According to Richard Gutting... "Our objective is to improve compliance. Today, buying the wrong product, or buying the right product from the wrong supplier, can cost you thousands of dollars in unexpected tariffs or penalties. And seafood regulation is no longer just about your products, it's about you and whether you are being careful. Being ignorant about your product's origin or proper trade

classification is not an option. Federal agencies can audit your records and even prevent you from doing business. All these changes add risks and costs, but they also bring opportunities."

As General Counsel to the National Marine Fisheries Service and counsel of the House Subcommittee on Fisheries and Wildlife Conservation, Mr. Gutting has intimate knowledge of seafood importing regulations and common pitfalls. The interactive workshop details seafood



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THE REPORTER'S GUIDE TO... **Cut-up broilers**

Few institutional lines are as commonly referred to as the cut-up broiler. Depending on the purchaser's requirements, the broiler may be processed any number of ways including eight- and nine-piece cuts, halves, quarters or supplied as individual parts—drums, breasts, legs or thighs.

The eight-piece cut broiler is popular among fast-food and foodservice establishments because of the inherent flexibility of the product. In the 1960s, the fast growing popularity of the Kentucky

Fried Chicken franchises escalated market demand for cut-up broilers. Eight- and nine-piece cuts were then done by band saw and proved a daunting task for the inexperienced operator. Since that time, the band saw has given way to automated cut-up lines and is routinely accomplished to the user's specifications. A typical eight-piece cut will be produced by separating the whole bird or carcass into two breast halves (with the ribs and back), two whole wings, two thighs, including the tail, and two drumsticks.



◀ **Breast Half** The breast half is produced by splitting the whole breast in half through the breast or keel bone. A whole breast is cut beginning at the shoulder joint, down towards the tail, and out the chicken near the last vertebrae.



◀ **Whole Wing** Wings are all white meat and when marketed whole, contain all three joints cut from the carcass at the shoulder joint.



◀ **Thigh** The thigh is separated from the drum by a cut at the knee and is all dark meat. Broiler thighs may be marketed both with and without the back portion but an eight-piece cut contains the ribs and back.



◀ **Drumstick** This part is the lower portion of the leg quarter and is all dark meat. Tendons are not removed and skin is on. **UB**



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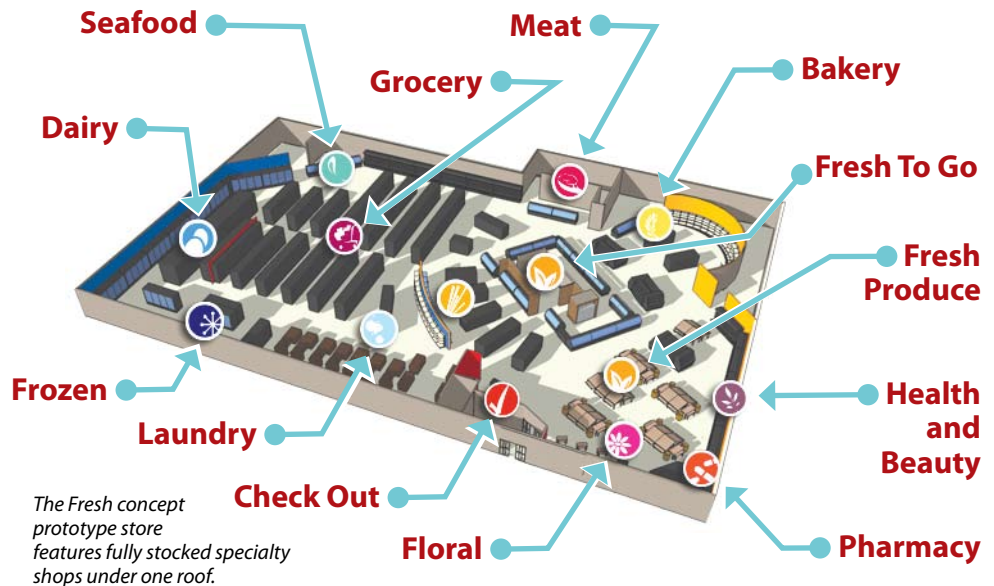
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New store merges tradition with innovative format...

A&P takes fresh evolution to next level

Re-thought, re-designed and ready to give the consumer a shopping experience like no other, The Great Atlantic & Pacific Tea Company, Inc. revealed its Fresh concept prototype store that, aside from offering traditional and non-traditional foodstuffs, bears no resemblance to conventional supermarkets.

Located in Park Ridge, New Jersey the revamped A&P logo outside hints at what the company hopes will astound shoppers inside. A & P President and CEO, Eric Claus said, "In reinventing the food shopping experience for our customers, our goal in Park Ridge was to marry the best elements of innovative American and traditional European food-selling approaches. So in and around our full range of grocery products, we've put together a neighborhood of shops under one roof. These are not just departments - they're fully stocked specialty shops offering the finest fresh foods and



complementary products."

Throughout the new Park Ridge A&P Fresh store, shoppers' senses are attacked by the

sights, sounds and smells of the 17 shops that are located

on "streets" in neighborhoods that are identified by easily recognized symbols located throughout the store. In each neighborhood consumers can

browse the many opportunities afforded to them 'market-style.' Whether artisan breads baked in an old world brick oven, a fish mongers selection of seafood, or a selection of chocolates from around the world, many shopping opportunities await the consumer.

"...our goal...was to marry the best elements of innovative American and traditional European food-selling approaches."

For week in, week out shopping, the traditional grocery section will still satisfy the basic consumer needs with a complete range of national brand products, and A&P's own America's Choice line. "We're very proud to open this truly special store, both to best serve our customers in and around Park Ridge, and also as an example of the Fresh thinking that's revolutionizing A&P," said Eric Claus. "Offering the best quality, the best overall value and the most enjoyable experience possible is what the new A&P is about - and we will continue raising the bar in all three criteria as we go forward." **U**



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The history of hot sauce

Recent trends in the food industry have shown a rise in the use of spices and the consumption of what are classified as 'spicy foods.' There are many factors contributing to this rise, from health related issues and concerns to increases in ethnic populations more familiar with these spicy flavorings. Whatever the reason for the upswing, the increase is quite obvious as a simple stroll in the aisles of your local grocer and a count of the many varieties of spicy sauces quickly reveals. While things may be

The United States is in the top 10 hot sauce consuming countries.

heating up for hot sauces more so now than ever, truth is, they have been in existence since humans first realized chili peppers were edible.

Historians specializing in this area have used everything from old newspaper ads to the labels on old bottles housed in private collections to gain insight on

the history. Even bottles recovered from ancient shipwrecks have provided proof of the sauces longtime existence. Most historians agree that although they existed for thousands of years, it wasn't until 1807 that a Massachusetts newspaper ran an ad for the first commercially available hot sauce—a cayenne pepper sauce.

The next major milestone in the hot sauce world came in 1849. That year the first after market flavoring sauce was imported into the United States. Lea & Perrins Worcestershire Sauce was brought to the U.S. from England to rave reviews. Separately that same year, the first commercial chili crop was raised by Colonel White from which the first hot sauce from "Tabasco" chiles was manufactured. That sauce instantly became popular, and hot sauces in general began to be accepted as a commercially viable product.

Things really began to heat up for the hot sauce industry in 1868 when Edward McIlhenny developed his own version of a Tabasco chili sauce, called Tabasco®. In 1870 he patented the variety of sauce and in 1906 trademarked the brand we still recognize today, thus paving the way for Tabasco's continued success. Other varieties of hot sauce tried to follow in the popularity of Tabasco with claims of exotic flavors and even medicinal benefits, but few have stood the test of time like the Tabasco brand.

"...the hot sauce market is exploding and most larger grocery stores carry up to 200 different varieties."

Today the hot sauce market is exploding and larger grocery stores carry up to 200 different varieties. As you may have guessed, consumption is up as well. The United States is in the top 10 hot sauce consuming countries with California, more specifically Los Angeles, consuming the most—a total of 3.3 million gallons a year and growing. **UB**



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What is my carbon footprint?



"Global warming...

**is the warming
of the earth...
related to the
amount of carbon
dioxide gas (CO₂)
released into the
atmosphere."**

Among *An Inconvenient Truth* winning an Oscar, the Live Earth concerts around the world and the recent Pulitzer win by former Vice President Al Gore, you may have heard a thing or two about global warming. Global warming, in shortest terms possible, is the warming of the earth over the past several decades related to the amount of carbon dioxide gas (CO₂) released into and deteriorating the atmosphere.

It is clear that at this point, awareness is out there and one very popular buzz word is "carbon footprint." A carbon footprint is the amount of CO₂ emissions you personally contribute. It is the direct effect your actions and lifestyle have on the environment.



Examples are: how many miles you commute each day, whether or not you turn the lights off when you leave a room, and how much paper you use at the office.

If you search the Internet for your carbon footprint you will come across a slew of carbon footprint calculators on the Web. The carbon footprint calculator ranges from questions like "How many Kilowatt hours do you consume annually?" to "Do you take more showers than baths?" It uses this data to compute the amount of carbon you use. The idea is to find out how much CO₂ you are responsible for and offset that amount by changing your habits or become "carbon neutral."

There are multiple ways you can offset

your carbon dioxide emissions. You can get started by taking some of these suggestions:

- Walk or bike when you can, instead of driving.
- Properly inflate your tires. This will improve gas mileage and reduce emissions.
- Eat locally. If your food travels less, it creates less CO₂.
- Use recycled products and recycle again.
- You can also contribute to organizations sponsoring research and projects in renewable energy and energy efficiency. **UB**



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Recognizing the growing concern for animal welfare

In speaking of eggs, the terms “free range” and “cage-free” have created a frenzy. Suddenly, eggs from chickens raised in large, open areas of fresh grass, scratching the ground and enjoying other natural amenities are among new menu “requirements” for schools, restaurant chains and grocers across the nation. Actually, it has been found that many eggs labeled cage-free do not come from chickens enjoying such lavish perks.

In fact, officials at Notre Dame turned down a request to switch to cage-free eggs after a six-month investigation found that both the caged and cage-free operations they visited appeared to take “equally good care” of their chickens. The university ultimately decided to stay with their original source for eggs as they believed it had exemplified the edge in food safety.

Jocie Antonelli, nutrition and safety manager for Notre Dame said, “There are pros and cons to each system. Either way, these are not free-roaming chickens living out in a pasture.”

As there is no “official” definition to the term “cage-free,” the United Egg Producers (UEP), an organization representing most U.S. egg companies, is attempting to change how birds are treated. “In the egg industry, the hens come first,” says the UEP. Their belief in this philosophy is so strong that they developed the United Egg Producers Certified program for cage, and cage-free production systems.

The UEP Certified Welfare Program is a program that assures eggs with the United Egg Producers Label are from egg farmers who have implemented the UEP Certified Guidelines on 100% of their farms. This means they adhere to the highest scientific

standards for egg production and undergo independent audits from the USDA as well as the independent testing firm Validus to ensure 100% compliance.

The program was designed out of guidelines established by an independent advisory committee made up of some of the top animal welfare experts in the United States. The USDA, the FDA and the FTC have approved the

UEP Certified logo and the International Egg Commission recognizes the program as a model from which to create animal welfare programs in other member countries throughout the world. Also, the Food Marketing Institute and the National Council of Chain Restaurants has

endorsed its guidelines.

Hens raised in modern cage systems are protected from predators, severe weather, diseases and soil-borne diseases. The UEP’s program for cage production provides assurance that the hens are raised with adequate space, nutritious food, clean water, proper lighting, and fresh air which not only improves the flock’s livability, but their egg production rates as well. Additionally, the cage system allows for caretakers to visually inspect each hen every day and it has also eliminated the need to administer medications, leaving the birds in a state of optimum health and welfare.

By purchasing eggs with the United Egg Producers Certified logo consumers can ensure they are receiving the safest, highest quality and most economical eggs in the world. **UB**



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www.uepcertified.com

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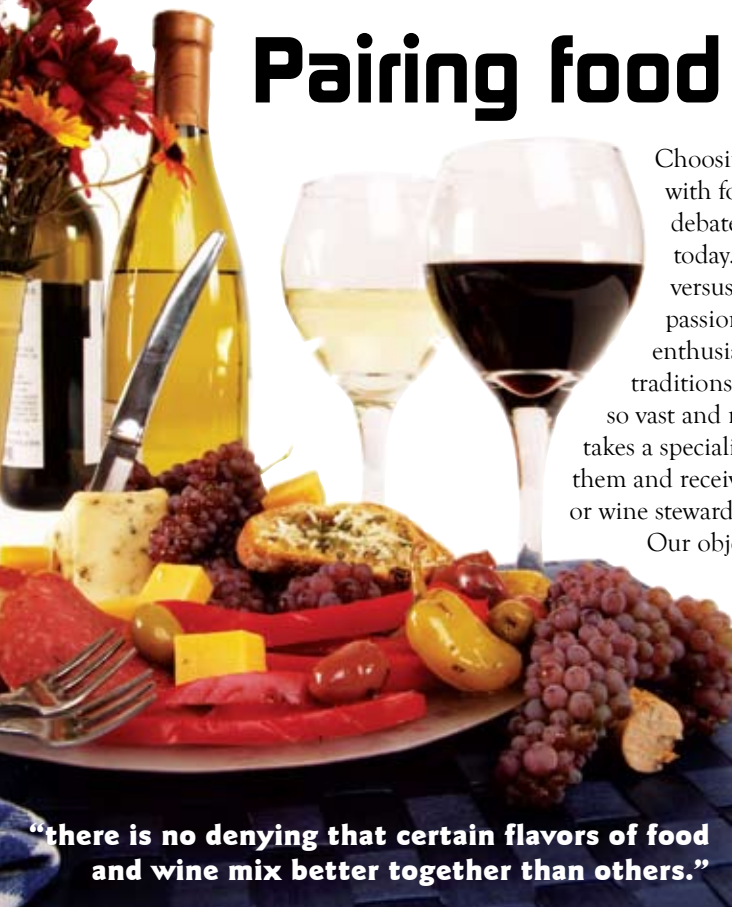
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Pairing food and wine



"there is no denying that certain flavors of food and wine mix better together than others."

Choosing the "right" wine to pair with food is one of the most hotly debated topics in the wine world today. Only the subject of cork versus screw cap can elicit a more passionate debate between wine enthusiasts. The complexities and traditions related to this topic are so vast and numerous that it literally takes a specialized education to master them and receive the title of sommelier, or wine steward, a recognized wine expert.

Our objective here, however, is not to turn you into a master sommelier or to hand-down a set of steadfast rules, but rather to provide the novice wine drinker with some suggestions to better pair food and wine choices.

The 'traditional' rules for wine pairing have

relaxed in recent times but there is no denying that certain flavors of food and wine mix better together than others. While having a glass of white wine with meat or a glass of red wine with fish or seafood is not unheard of, you always want to be cautious. You don't want to serve a very strong tasting wine with a delicate entree, or vice versa. Ideally, the wine and the food should complement each other, not battle against each other. One quick tip that some experts recommend when deciding, "simple wines with complex foods...complex wines with simple foods."

The most important piece of advice that we can give, and it applies to everyone at every level of knowledge, is simply drink what you like!

Some common pairings to get you started:

Eggs - Sparkling

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Turkey - Pinot Noir, Zinfandel, Merlot, Riesling, Gewurztraminer

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Pork - Merlot

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Lamb - Syrah, Rhone Varietals, Cabernet Sauvignon, Merlot

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Top stories based on subscriber hits September 17, 2007 through November 16, 2007

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2. **JBS-Swift Deal Changing Beef Industry** - 11/6/07
3. **Hog Industry in 'Crisis' Mode, Worldwide** - 10/10/07
4. **Beef Producers Selling Meat with E. Coli** - 11/12/07
5. **Crying Foul over Thanksgiving Turkey Prices** - 11/6/07
6. **USDA Took 18 Days to Recall Meat; Agency Knew of Tainted Burgers, Employee Writes** - 10/4/07
7. **Ethanol, Once the Cure-All to Oil Problems, Facing More Heat** - 11/15/07
8. **Producers Fear Loonie's Rise Will Wipe Out Pork Industry** - 11/12/07
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The newest addition to the 'Seafood Price-Current'...

The growing popularity of Chinese crab meat

Crab meat, particularly jumbo lump, continues to increase in demand. A whole crab produces two pieces of jumbo lump

"As importers of crab now see a need to search elsewhere to fulfill the growing demand..."

meat with a typical can of jumbo lump crab meat ranging from approximately 80 to 120 pieces. This equates to the production of 40 to 60 crabs for each can. It is important to recognize that the FDA does not have any set standards for sizing or grading of crab meat and the size and piece count does vary depending on the packer.

Why the increase in demand? In part, it

is due to the recent commercials which advertise jumbo lump crab cakes for major casual dining restaurants. Although this item has been viewed as a specialty item in years past, it is now recognized as a regular menu item. The increase in demand has put some pressure on the natural resource.

The majority of today's supply comes from Indonesia, and Venezuela is also a major contributor. The crab meat that comes from these two countries is named *Portunus pelagicus*, also known as blue swimming crab. Indonesian meat is typically imported as pasteurized and sometimes as frozen meat in a can. Venezuelan product, which is also canned, comes to the U.S. as either fresh or pasteurized.



As importers of crab now see a need to search elsewhere to fulfill the growing demand, Chinese crab meat is making its way into the marketplace. The species of crab that comes from China is referred to as *Portunus haanaii* or red swimming crab.

Continued on page 73

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GAA CONFERENCE: milestone in aquaculture



Wally Stevens,
Executive
Director of
the Global
Aquaculture
Alliance

The 2007 GAA meeting in Madrid represented a milestone for moving aquaculture standards forward. This meeting marked the first time there was significant participation at the GAA from National Government

Organizers (NGOs) and certifiers, like Naturland, Europegap (now global gap), The Sustainable Fisheries Partnership, and Seaweb. Well before the Marine Stewardship Council (MSC) became widely known in the market place among retailers, the GAA had begun working on standards for sustainable farmed shrimp—not under pressure from NGOs, but from a recognition of the buyer's need for industry standards, and the unique role the GAA could play in both the development and implementation of those standards. The GAA shrimp standards, implemented through the Aquaculture Certification Council, have been written into many retail and foodservice specifications. They also were the primary template for sustainable shrimp standards issued by the FAO in 2004.

What most outsiders do not realize is that the GAA is a minimally funded, largely



volunteer organization. Nevertheless, it is committed to actually getting things done—as is common in industry. When it became evident that buyers needed standards for farmed finfish development for species like catfish, tilapia, and basa or pangasius, the GAA stepped forward with a concrete plan to do so. The GAA is forming standard oversight committees (SOCs) for each of the major species and feed production which will have a balanced membership of 1/3 industry, 1/3 NGO, and 1/3 scientific or academic members.

One of the most striking charts at the GAA conference was presented by Roger Bing, of Darden, who said that without any further increase in seafood demand in the U.S.,



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rising population alone would mean a need for an additional 400,000 metric tons of product weight (nearly 2 million metric tons of live product) simply for the U.S. to continue consuming seafood at its present level, with projected population growth. Some environmental groups look at these facts and say no. They think growth of aquaculture will put too much strain on existing resources—from use of the stable supplies of wild fishmeal from well managed fisheries to use of coastal land and water resources.

“...rising population alone would mean a need for an additional 400,000 metric tons of product weight.”

Unilevers (now Primera) of the world, all are customer driven. They see their customers want more seafood, and are also concerned about the sustainability of wild stocks. They also want to pay stable prices. As a result, they embrace certification and environmental labeling, not just to show to customers that they can be trusted, but to solve the problem of increasing the global supply of seafood—a product in heavy demand—in a long term sustainable manner. Those NGOs who recognize the buyer interest in both sustainability and in greater aquaculture production, are the ones most likely to work with GAA on real standards that actually get implemented all the way down to the individual small farmer. **UB**

*Adapted from an article by John Sackton
which originally appeared on Seafoodnews.com
on November 5, 2007*

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On the other hand, the major buyers—the Wal-Marts, Carrefours, Dardens and

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It's not just about dust and pollen anymore...

The growing threat of food allergies



It wasn't very long ago that the food industry paid little attention to the subject of food allergies. Today, it's estimated that 11 million Americans suffer from some form of food allergy... and the numbers are growing. Not only do more people seem to be acquiring allergies to a widening variety of foods, but some allergies, like those

to eggs, are not being outgrown as quickly as in the past.

So, is our food supply at root, or is some other explanation possible? Research, both in Canada and in the U.S., increasingly suggests that our environment may hold the answer. The theory is that our preoccupation with hygiene and cleanliness, not the food supply,

is causing our immune system to misfire. Toxin fighting white blood cells, and the antibodies they produce, mistake innocent foods like eggs or wheat for more harmful substances like viruses, germs and infections, and start wreaking havoc. Some studies have shown that children who have grown up on farms or who are in closer

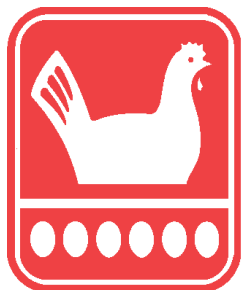
contact with dirt and animals are less prone to developing allergies.

Milk from a cow is the most common food allergy. It is usually caused by a reaction to the proteins in the milk. A milk allergy is distinct from a food intolerance, as that is commonly due to the sugar lactose. Allergies to cheese, ice cream, yogurt and other dairy products are similar and common in those allergic to milk. Like with milk, many individuals—approximately 600,000 Americans—are allergic to the proteins found in egg whites. This is especially common in children. People allergic to eggs also avoid egg substitutes and foods that are prepared with eggs.

However, food allergies are not just limited to dairy and egg products. The Food Allergen Labeling and Consumer Protection Act (FALCPA), which took effect January 1, 2006, mandates that foods containing milk, eggs, fish, crustacean shellfish, peanuts, tree nuts, wheat, and soy must declare the food in plain language on the ingredient list. But that's not all; some food manufacturers are providing point of sale reference materials to help enlighten consumers on what the best ways are to prevent food allergies. According to the Mayo Clinic's "Tools for Healthier Lives," introducing cow's milk to your child after the age of one reduces the chances of your child developing a milk allergy. They also recommend not introducing eggs to children until they reach the age of two.

"...preoccupation with hygiene and cleanliness, ...is causing our immune system to misfire."

Whether it's milk and eggs, or peanuts and shellfish, food allergies affect the lives of millions daily. The U.S. food industry's aggressive effort at providing the safest food supply in the world doesn't help food allergy sufferers. Educating the consuming public and taking certain preventative steps are presently the best and only real medicine prescribed in the attack against food allergies. **UB**



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Species 101: **Wahoo**



Wahoo, *Acanthocybium solandri*, is a relative of the mackerels that can attain weights over 100 pounds, but is typically caught at weights between 30 and 100 pounds. It is found in the tropics and subtropics worldwide where the ideal temperature of the water is 70 to 86 degrees Fahrenheit. In Hawaii, it is commonly referred to as Ono which means “good to eat” or “delicious” in Hawaiian. Other common names are Oahu fish, Pacific Kingfish, ocean barracuda, Jack mackerel, and Peto.

The wahoo is dark blue or electric blue in color with a silver belly with vertical stripes or markings that have a wavy pattern. The dorsal fin is curved and gets higher towards the back of the fish. They have sharp teeth and a large mouth. Their

growth is quite rapid.

Some believe that the name wahoo derived from the expressions of excitement that were yelled by the fisherman when they would catch one. However, islanders say early explorers derived the name from the Hawaiian Island of Oahu as fish there are plentiful.

Wild caught wahoo are commonly landed using hook

“Some believe that the name Wahoo derived from the expressions of excitement that were yelled by the fisherman when they would catch one.”

& line, longline or trolling methods. They typically swim alone or in pairs and are not found in schools. Many commercial fishermen report harvesting wahoo as a by-catch of tuna or swordfish.

Commercially they are sold as fresh, whole, headed and gutted. The meat or flesh is delicate, white and lean. It must be cooked so as not to dry it out and poaching proves a good cooking method. Frozen wahoo is sometimes imported from India and other parts of Asia in steaks or fillets.

To find information on other species of fish and shellfish, refer to *Umer Barry's Commercial Guide to Fish and Shellfish* available at www.shopurnerbarry.com **UB**

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Making meat tender and tasty...

A shot of flavor for your tri-tip

There is much speculation as to how, where and why the marinade originated for meats. Some are myths, some provide historic details and some explanations are just plain silly.

Mexicans in the 14th century are believed to have wrapped meat in papyrus to act as a tenderizer, while in Asia, soy sauce was said to have been used as early as the 16th or the 17th century as a marinade. Some people even think the word marinade is derived from the Italian “marinare” or based off a Latin term related to pickling fish. In any case, marinade serves the distinct purpose of making even the toughest meat tender and tasty.

The tequila marinade offered below uses soy sauce and lime to break down the chewy tri-tip. The underrated tri-tip is comparable to a top round london broil in texture. It comes from the bottom portion of the sirloin or bottom butt. Top sirloin may have more marbling, but there is no denying that the triangle tip offers plenty of flavor. Marinating makes the tri-tip even more tender and prevents it from drying out during cooking. This marinade even offers a unique ingredient to give it a kick—tequila!

It is unclear when people began using tequila in marinade, though it has been shipped to America since the early 1870s. Tequila hit its popularity in the 60s when students in California invented the margarita. Most believe it is made from cactus, but tequila is actually made from the blue Agave, a flowering plant from tropical climates.

Tequila is named for the municipality where it originated in Mexico. When fermented, tequila is around 105 proof, however, must be reduced to 80 proof in order to be shipped to the United States. The high alcohol content and distinct flavor make tequila a spicy ingredient for you to use as a marinade for your roast or steak. **LB**



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Ingredients:

1/4 cup tequila
1/3 cup soy sauce
1/2 cup fresh lime juice
7 garlic cloves, finely chopped
1/2 cup chopped fresh cilantro
1/2 cup extra virgin olive oil
2 teaspoons cumin
2 teaspoons oregano
1 teaspoon fresh ground black pepper
Optional: grated lime peel
2 2-pound beef loin tri-tip roasts, trimmed
(if steaks, at least 3/4 inches thick)

TEQUILA MARINADE FOR BEEF

To Prepare:

Chop cilantro and garlic cloves. Add remaining ingredients and whisk together in medium bowl. Pierce meat for added tenderness. Place meat in food grade container and add marinade.

Make sure entire surface of the meat is covered. Refrigerate meat in marinade overnight.

Serves 8 people.



Etching leads to greater consumer confidence...

Food safety taken to the 'eggstreme'

In an effort to bring added confidence to consumers in the Northeast, EggFusion



announced it has formed a partnership with BJ's Wholesale Club and will make its mark with its freshness and traceability coding on eggs sold in BJ's stores in Massachusetts. BJ's is now the first wholesale club to offer a tamperproof food safety feature on eggs sold to its members.

"Food safety is of the utmost importance to us," said Laura Sen, Executive President of merchandising and logistics at BJ's Wholesale Club.

"We are making food safety more transparent and convenient."

Now BJ's members can be assured the eggs they purchase from the wholesale club are tamperproof and fresh. Each EggFusion

egg has a freshness date etched on it to show the date by which it should be consumed along with a traceability code which is able to provide information on where and when each egg was packed.

"This is a great way to help our members understand that what they are buying is fresh and has an expiration date. We are making food safety more transparent and convenient so that members no longer have to rely on the expiration date marked on the carton," said Sen.

BJ's has been selling eggs with the USDA accepted etching process since March

2007 and has already delivered more than 12 million eggs with traceability codes to its members. BJ's says it will continue to rollout the coded eggs throughout the company.

Members can retrieve egg-specific production information such as when and where the eggs were packed on www.MyFreshEgg.com using the alphanumeric traceability code. **LB**



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National Fisheries Institute combats fraud and deception: Establishes Economic Integrity Initiative and Better Seafood Bureau

Given a finite amount of resources, the agency charged with protecting our food supply, the Food and Drug Administration (FDA), has dedicated only a limited amount of these resources to the issue of economic fraud. Recognizing this, and in an effort to combat a decrease in consumer confidence and increase in concern over country of origin, in 2006, the National Fisheries Institute (NFI) Board approved an Economic Integrity Initiative. The initiative



focuses on three key areas, mislabeling or substituting species, low weights or undercounting, and transshipments to avoid duties.

NFI's goal is to increase consumer confidence in seafood products by developing a process for accountability.

The Economic Integrity Initiative is now a condition of NFI membership. Each member company must pledge their commitment to fair and lawful business practices by agreeing to the following statements...

- Our products are correctly labeled for weights and counts
- Our products are correctly labeled for identity and that species are not substituted in any matter
- Our products are correctly labeled for country of origin
- Our products adhere to all other labeling laws

This initiative led to the formation of the Better Seafood Bureau (BSB), an independent body that establishes accountability for lawful business practices in seafood distribution and retailing. Its purpose is to collect information concerning "intentional," illegal economic fraud in the seafood industry.

The priority of the BSB is to report incidences of intentional misbranding of seafood with incorrect name of the seafood or net quantity statement, as well as the illegal trans-shipment of seafood.

The BSB, launched in July 2007, is a corporate entity separate from National Fisheries Institute. It has a separate Board

of Managers, 16 members representing the NFI Board of Directors, NFI membership, and the public.

Similar to Better Business Bureau, the BSB is a system to report unresolved challenges, with a call-center established to document unresolved situations of economic fraud. There, complaints are logged following a script developed by the BSB Board of Managers. The call-center ensures that the caller has attempted to resolve the situation with their supplier and provides reports of call to the Board of Managers.

NFI members will be notified after each logged complaint. After three complaints, the member company must submit to a third-party audit in order to determine if the member is adhering to their pledge. If after ample opportunity to correct the error the offending member has not sufficiently met the proper obligations, that member will then be dismissed from NFI.

The Better Seafood Bureau program will highlight NFI members as committed to the highest ethical standards. This will further emulate to consumers that high standards for business operations and accountability are upheld.

Only time will determine the magnitude the changes NFI's Initiative and BSB Program will bring about, however, significant results can be seen immediately in the power of retail and restaurant industries' purchasing decisions. **UB**

"NFI's goal is to increase consumer confidence in seafood products by developing a process for accountability."

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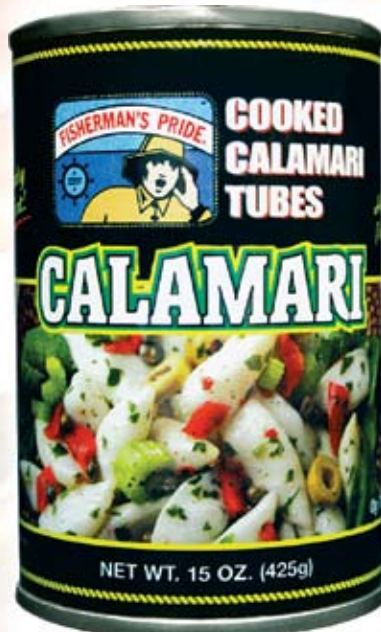
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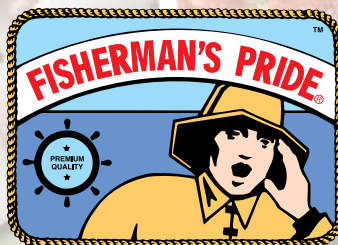


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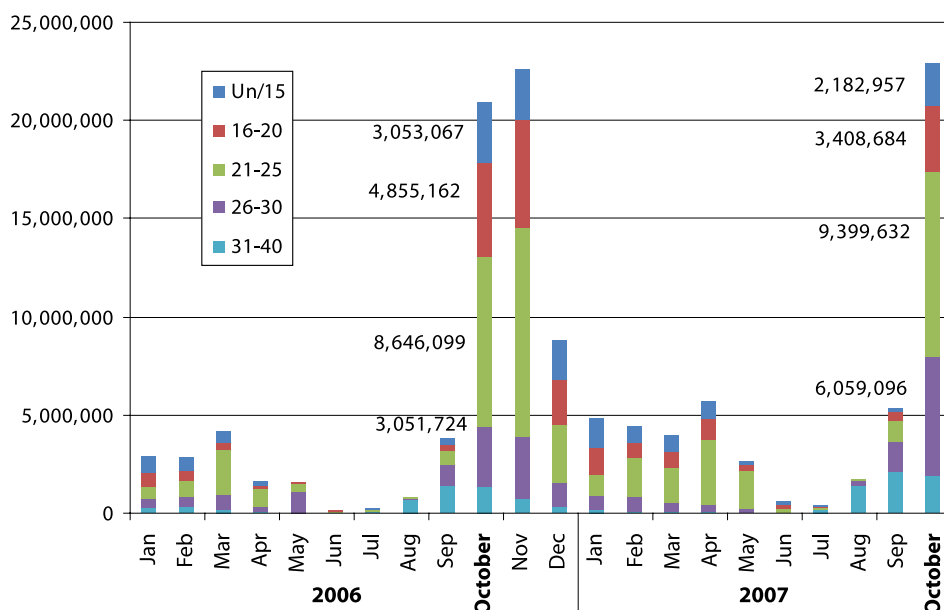
Lower production, greater demand

What a difference a year makes! Last year saw ample supplies of both Mexican farm-raised and wild shrimp at traditionally low prices. Much like the U.S. domestic Gulf shrimp fishery, the Mexican wild shrimp fishery is reported down sharply from last year, and prices are up to more seasonally average levels. Additional anecdotal evidence indicates that farm-raised production may also be down.

However, initial imports from the season's first month, October, are higher than a year ago. (see graph, right)

Most participants in the Mexican fishery report that catches are off anywhere between 40-70% from last year's levels. Despite the fishermen's pleas for a normal opening to the season, this year it opened historically late which permitted shrimp to disperse in the ocean. This fact, together with colder than normal water temperatures, appears to

October Mexican Shrimp Import Comparisons



October imports; when compared to a year ago, indicate an ample supply of 26-30 count, a balanced supply of 21-25 count, and a shortfall of under 15 and 16-20 count.

Source: U.S. Census, Urner Barry

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boosting Mexican shrimp prices

be the reason for limited production.

Farm-raised shrimp in Mexico were also subject to seasonally cold water conditions. Sub-optimal water temperatures, and an additional problem of some poor quality larvae, have reportedly affected production. Many participants report that farmed production will be down 20% from a year ago. There have also been additional demands on farmed shrimp to supplement the short supply of wild shrimp especially on 16-20 count.

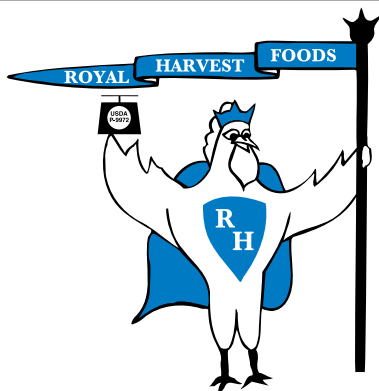
Finally, the Mexican domestic market continues to demand additional supplies of shrimp leaving less for export to the U.S. market. **UB**

"...this year it (the Mexican fishery) opened historically late which permitted shrimp to disperse in the ocean."



Used in Mexico's bays and estuaries, this colorful panga is ready for its next excursion.

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The factors affecting food prices are global...

Food prices continue to rise in the U.S.



Expanding depression in the housing market, a weak U.S. dollar, and overall fears of an economic slowdown have occasioned consumers to be increasingly prudent in their expenditures.

Fiscally prudent maybe, but there's only so much the average American household can do to prevent spending a larger portion of their disposable income on food.

Fueling already jittery inflationary fears, rapidly rising food costs are a real concern. As expressed by John Lonski, chief economist of Moody's Investor Service, this is the worst short period of food inflation since 1990. Michael J. Cuggino, manager of the Permanent Portfolio, a mutual fund, emphasized that government data show the costs of food and energy are going through the roof and also said that "Businesses need energy, and people need to eat."

The consumer price index, or CPI, is the recognized standard for measuring changes in pricing within a certain period of time. It is comprised of a fixed basket of goods and services, including food.

The seasonally adjusted annual rate (SAAR) CPI as of September 2007 revealed that food prices increased 5.7%. This increase represents a significant change when compared to a 2.6% rise for all of 2006. Some of the more noteworthy advances include dairy and related products where year-to-date prices increased 12.5%; milk, which rose 19.3%, eggs were 43.9% higher than a year ago; and poultry year-to-date pricing levels rose 8%. In

general, grocery store food prices increased at an annual rate of 6.7% during the first nine months of 2007.

The factors affecting food prices are global, and have impacted many countries. In late October, Mexico's central bank increased its overnight interest rates largely due to inflationary fears resulting from rising food prices. Up-and-coming industrialized nations like China, India, and Brazil are demanding more raw materials like grains, beans, and corn to feed livestock and a growing population. Increasing demand for ethanol is putting further pressure on corn production and contributing to record prices.

According to Professor of Agricultural Economics Darrel Good at the University of Illinois, given that the production of raw materials is often linked, problems in one market can spread to another. For example, as a result of the growing demand for corn production, less land and fewer resources are available for wheat and soybean production. The result—soybean prices that

advanced 40% in the first three quarters of 2007 and a reduced supply. Furthermore, The Kellogg Company felt it had no choice but to increase cereal prices given that cost of wheat used in Frosted Mini-Wheats and Eggo Frozen Waffles soared 60%. The company's CEO, David Mackay, said: "We see a long-term upward trend in commodities."

In addition to rising costs for raw materials, a weaker U.S. dollar has had an impact on the domestic food industry's purchasing power of the currency by making imports more expensive.

There appears to be no signs of relief in the near future as economists have warned consumers not to expect lower food prices. Although some investors have relied heavily on core inflation signals—which exclude food and energy—and thus believe that overall inflationary fears are yet not worrisome, as Associated Press writer, Lauren Villagran said in a recent article, "It's enough to make you cry in your cornflakes." **UB**

"...as a result of the growing demand for corn production, less land and fewer resources are available for wheat and soybean production."

% change in value from
September '06 through
November '07

CORN
57.6%



WHEAT
72.7%



SOYBEAN
94.7%



Source: Chicago Board of Trade (corn, soybean), Kansas City Board of Trade (wheat)

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Urner Barry and Richard Gutting have teamed-up once again!

Urner Barry is pleased to announce that Richard Gutting, lawyer and seafood regulation expert, will be sharing his research and expertise with Foreign Trade Data (FTD) customers. Dick is a partner in the law firm of Redmon, Peyton & Braswell, LLP, and has been actively involved in the regulation of seafood in the United States for over 30 years.



Richard Gutting, Jr.

"The FTD Web site provides detailed information on each and every frozen waterborne shipment of seafood entering the United States."

The FTD Web site provides detailed information on each and every frozen waterborne shipment of seafood entering the United States. Commodity names, importer and exporter names and addresses, volume of shipment, country of origin, U.S. port of entry, date of arrival and much more are provided in this fully upgraded online version. The FTD site allows you to access full lookup and sorting capabilities, trade reports, full-color summary reports and charts, address reports, and weekly data updates. It also puts complete shipment records at your fingertips allowing you to analyze and search as you desire. The most recent data of import information is automatically updated weekly with over 1200 new records per week.

Highlighting this partnership are two of Dick Gutting's latest

works, *A Practical Guide to the Regulation of Seafood in the United States* and *Model Seafood Import Compliance Manual*.

"The Red Book", as *The Practical Guide* is affectionately called, is the first comprehensive regulatory guide for the buyers and sellers of seafood in the U.S.—providing a concise summary of the federal requirements governing seafood safety and inspection, labeling, permits, recordkeeping, customs and international trade, advertising, business practices and fishery trade restrictions. The online

version of *A Practical Guide to the Regulation of Seafood in the United States* outlines the sections of the book and will allow you to search the body of the text by keyword, providing all this vital seafood importing information at the click of a mouse.

The second of Dick's publications featured on FTD, the *Model Seafood Import Compliance Manual*, is a step-by-step system for seafood importing using checklists, supplier reviews, agreements, product specifications and descriptions. It is intended to guide you in drafting a manual specifically designed for your products and operations. Recently published by Urner Barry Publications in October 2007, this book previously has only been distributed at the Seafood Import Workshop Series. For more information on the latest installment of the Seafood Import Workshop series, go to <http://www.urnerbarry.com/seafoodimport>.

Also new to the FTD site is the Seafood Directory of International Government

Agencies. This comprehensive directory lists international organizations, fishery management organizations and governmental departments by region such as the Americas, Asia and the Pacific, Europe, the Middle East and Africa. Each listing in the catalog is linked to the Web site in its native language.

Beginning January 2008, Foreign Trade Data service is available to you for \$159 a month for a single user license. For more information on how to subscribe, e-mail sales@urnerbarry.com or call 732-240-5330.

The section below is a "sneak peek" at the type of information subscribers can expect when they sign up to the FTD Web site. **UB**

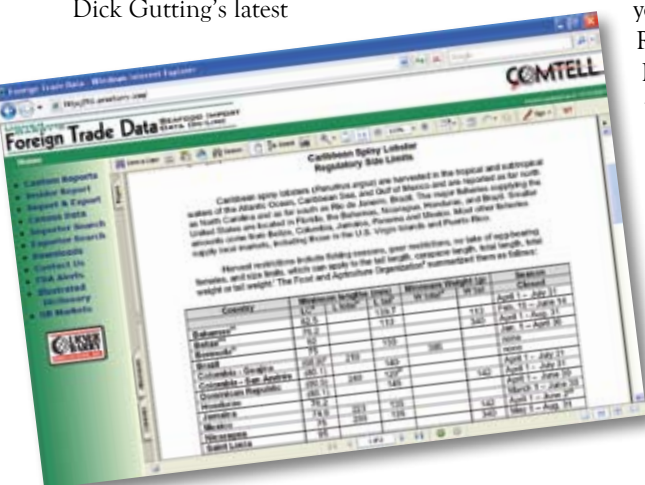
Caribbean Spiny Lobster Regulatory Size Limits

Caribbean spiny lobsters (*Panulirus argus*) are harvested in the tropical and subtropical waters of the Atlantic Ocean, Caribbean Sea, and Gulf of Mexico. The major fisheries supplying the United States are located in Florida, the Bahamas, Nicaragua, Honduras, and Brazil. Smaller amounts come from Belize, Columbia, Jamaica, Panama and Mexico.

Harvest restrictions vary by nation and include fishing seasons, gear restrictions, no take of egg-bearing females, and size limits, which can apply to the tail length, carapace length, total length, total weight or tail weight.

In an effort to attain long-term sustainability and more stable production, the U.S. government passed the Lacey Act, a U.S. law that requires importers and buyers downstream to adhere to the laws of the foreign producing country regarding legal tail sizes. Penalties for Lacey Act violations are severe. Rules change and you should always ask your supplier or the government officials responsible for regulating harvests about the specific restrictions that apply to your products.

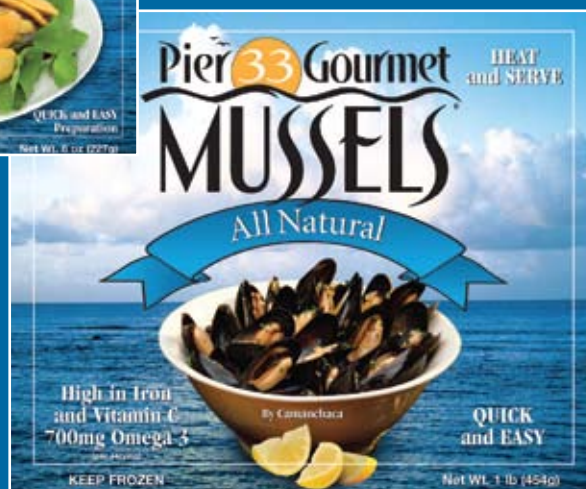
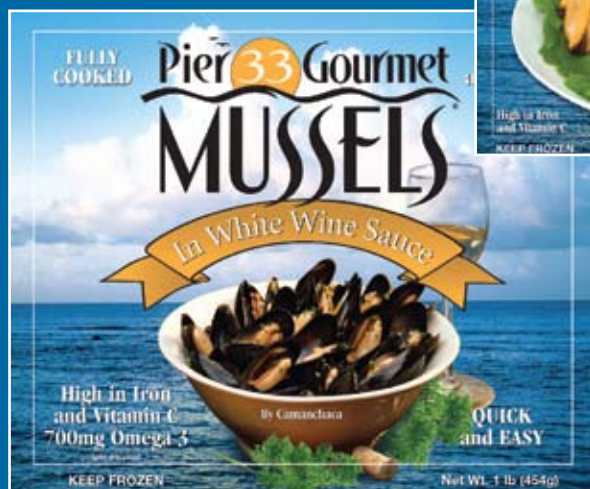
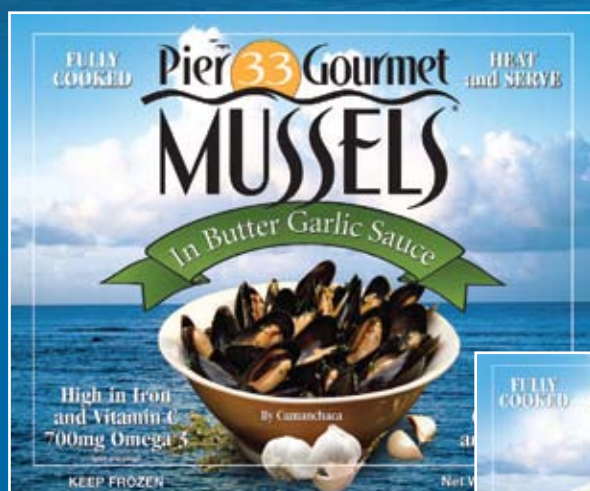
Sizing information is available on the newly updated Foreign Trade Data Web site. If you are not a subscriber, please contact your Urner Barry account manager.



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Boston is home to the first "green" certified fast-food outlet

The Grille Zone, located near Boston University in Massachusetts, is the nation's first certified "green" fast-food outlet by the Green Restaurant Association. This eatery is so eco-conscious that it generates almost no trash.

"It was an immediate decision to try to make this restaurant as green as possible while doing it dollar-efficiently," said co-owner Ben Prentice.

The 25-seat quick-casual restaurant goes beyond the earth friendly green mile. It is committed to doing all it can to reduce its impact on the environment while serving all fresh and delicious foods at the same time.

All of Grille Zone's cooking, cooling, washing and ventilation equipment are the most energy efficient available. It also uses cutlery made from potato starch, plates from sugarcane pulp and cups from cornstarch—all of which are fully compostable and will become mulch in 90 days or less. In fact, the Boston restaurant produces an average of no more than 15 pounds of waste per day. According to the Green Restaurant Association, this number is significantly different from the amount an average restaurant produces per



day which is approximately 275 pounds of waste.

Even their meat, bread, vegetables and soft drinks are all produced as locally as possible to minimize delivery-truck emissions. Prentice said by ordering from local suppliers, less fuel is spent transporting the food, such as their hamburgers, hot dogs and buns.

"Keep it super fresh. Make a commitment to never being frozen and building every item as carefully as possible. We found the best way to do it, was buy from local, small businesses," Prentice said.

Although the hot dog buns and hamburgers come from further locations than he would like, (the hamburger makes a 60-mile trip), Prentice said they are the best he has found. In addition, he said, "it still beats out the voyage other food items make via big-name suppliers."

The founders, Ben Prentice and Barry Baker are currently seeking further locations in the Boston area as well as in Albany over the next five years. **UB**

"Keep it super fresh. Make a commitment to never being frozen and building every item as carefully as possible."

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Making sense of product to feed ratios

Businesses use a number of metrics to help manage their business. In stocks, people look at price to earnings ratio to determine how the market is pricing a company's stock. The return on assets ratio reveals the amount of resources needed to support operations. Ratios are also used in the meat, poultry and dairy business.


Feed represents a significant cost in the production of red meat, poultry and eggs. The feed ratio communicates the cost of a unit of feed relative to the price of meat or the product derived from the animal or animal product. These ratios are one tool that people use to determine industry profitability and consequently whether a producer may increase or decrease their production. Bill Lapp, a contributor to the OBSONO market forecasting service and principal of Advanced

Economics Solutions says that product to feed ratios are perhaps most useful in the dairy business. The milk to feed ratio is simply the price of a pound of feed ration as compared to the price of a pound of whole milk. For example, if the price of one pound of whole milk is \$9.00 and the price of a one pound ration of feed for a dairy cow costs \$3.00, then the product to feed

ratio would be 9/3 or 3.

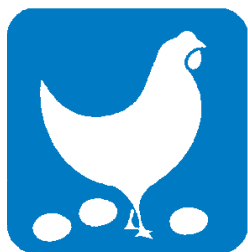
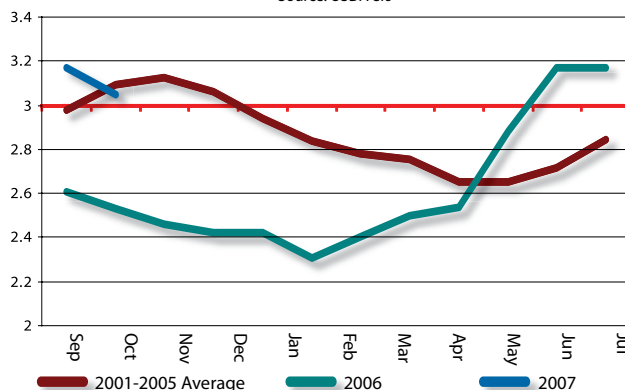
When this ratio is over 3, the price of feed is low relative to the price of milk. Everything being equal, farmers might increase production with a milk to feed ratio over 3. Conversely when the ratio is less than 3, the price of feed is high relative to the price of milk, and farmers might consider decreasing production.

These ratios are one piece of information that successful buyers and sellers make themselves familiar with.

OBSONO publishes market forecasts and analysis in their publications *Market Insight for the Meat and Poultry Industry* and *The Egg Report*. To get more detailed information on this topic and more, contact 732-240-2349 or e-mail sales@obsono.com 

Milk to Feed Ratio

Source: USDA ers



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Alternatives to fishmeal

Fishmeal is a high-protein component made from small bony fish that are not commonly used for direct human consumption. Although production is limited, it is a worldwide component in hog, poultry, and aquaculture feed—where the majority is used. The main producing countries are Peru, Chile, Denmark and Iceland. China is by far the largest buyer of fishmeal, although Germany and Japan are also heavy users. Chile, Norway, and Scotland, also utilize large amounts of fishmeal for their farmed salmon industry.

Fishmeal is rich in proteins, and very advantageous to use in farmed fish. The International Fishmeal and Fish Oil Organization claims it provides virtually all the nutrients fish would receive in the wild. Beneficial fatty acids and essential vitamins and minerals that help fish maintain a healthy immune system and optimize disease resistance can be derived

from fishmeal.

Production of fishmeal has not increased in the last 20 years, however, aquaculture has grown from 2.5 to 48 million metric tons in the last 35 years. As a result, prices of fishmeal have soared, and the need to strictly monitor the sustainability of the fisheries used to produce fishmeal has become significant. Consequently, research to find an alternative source has become crucial.

Despite softening prices for fishmeal, levels continue to be significantly higher in comparison to recent years. Soybean meal, which is the most immediate substitute, has shown more stable behavior. In 2007, prices of soybean meal advanced, however, they were still within reasonable ranges when compared to fishmeal. During the year, fishmeal prices oscillated about \$1,000/tonne while soybean meal proved less volatile at \$400/tonne.

Generally speaking, experience has shown that fishmeal cannot be entirely replaced by soybean meal. Some disadvantages include reduced growth as a result of feed being less palatable and a smaller amount of amino acid content. The ultimate negative result is a poorer feed conversion ratio.

Some experiments, however, have shown successful outcomes. For example, a recent experiment from Auburn University showed that feed for white shrimp—*Penaeus vannamei*—can be replaced by a combination of soybean meal and corn gluten meal without compromising economic and production performance. Still, this does not apply to all species.



“...there have been studies where fishmeal has been replaced with other non-marine animal proteins such as poultry by-product meal and bone and meat meal...”

Conversely, another study compiled in 2005 replaced fishmeal with soybean meal in red snapper. Although survival rates were similar, there was a clear drop in performance and weight based on reduced palatability.

Since around 2004, there have been studies where fishmeal has been replaced with other non-

marine animal proteins such as poultry by-product meal and bone and meat meal, displaying relatively good outcomes. In a recent study, successful replacement of 80% of fishmeal for poultry by-product meal was observed for shrimp production. However, other species such as hybrid striped bass and rainbow trout needed extra supplements of amino acids. For that purpose, Doctor Yu Yu from the National Renderers Association of Hong Kong, blended blood cells and hydrolyzed feather meal with protein meals—poultry by-product meal, meat and bone meal—for carp and sturgeon. The aim was to solve the problems of palatability and low essential amino acid content. The complementary effect that feather meal had revealed remarkably high protein and essential amino acid digestibilities (90%), lead to researchers suggesting that these blends prove to be valuable fishmeal replacements.

The conclusion is clear. With limited production and an increasing demand for aqua feed—in an ever-growing aquaculture industry—alternatives are likely to partially replace the use of fishmeal. However, this will be a gradual transition as continuous research and development delivers more positive results. **UB**



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Beaver Street Times Daily

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December 1, 2007

Sea Best 10 oz Jumbo Breaded Shrimp Sizzles to #1 Ranking in National Brands Units Sold For Breaded Shrimp

By RICK ARMSTRONG
Staff Writer

Summer Sales Memorial Wk - Labor Day Wk			16 Weeks Ending 9 / 8 / 07 *			16 Weeks Ending 9 / 9 / 06 *			% Change	
UPC	Description	Size	Units	Dollars	Avg Retail	Units	Dollars	Avg Retail	Units	Dollars
007539197555	SEA BEST BTFL SHRIMP JUMBO WHOLE BREADED	10 OZ	628,343	\$1,993,811	\$3.17	208,181	\$712,227	\$3.42	201.83%	179.94%

Data Source: AC Nielson

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Keep on chuckin': new cuts from the chuck roll



A new line of beef value cuts—this time fabricated from the beef chuck roll—is slated for a 2008 rollout. According to the Checkoff-funded Beef Innovations Group (BIG), the items represent the “next frontier” in the value cuts program that

began in the late 1990s with the Checkoff’s groundbreaking muscle profiling research.

BIG coordinates research and marketing efforts to expand the value cuts program in an effort to reach the industry’s Long Range Plan goal of increasing beef demand by ten percent by 2010.

for consumers, operators and retailers, processors, packers, steak cutters and beef producers,” said Tom Hotz, an Iowa beef producer and chairman of the Joint New Products and Culinary Initiatives Committee.

“Consumers will get new and economical steaks and roasts bursting with great beef flavor, and that’s positive news for producers. Cattle-Fax, a market research company that provides cattle and protein industry statistics, and market and economic analysis and forecasting, estimates that the first group of value cuts, led by the Flat Iron and the Petite Tender, added \$50 to \$60 a head to the value of the chuck, so we know from experience how popular products can affect our bottom line,” he added.

It expects to debut four to five new cuts from the chuck roll in foodservice and retail channels after the New Year. The new cuts will include two tender steaks for grilling, an affordable elegant roast for dry roasting, boneless country-style ribs and a fully cooked sumptuous roast.

“Optimizing the chuck roll should be great



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Ellen Gibson, executive director of the Checkoff-funded new-product initiatives said the flavorful new cuts are expected to offer versatility and value. "Since they work well with high volume cooking they have the ability to present increased profit opportunities for producers, packers, processors, retailers and foodservice operators," Gibson said. "The chuck roll also lends itself well to home-style and ethnic dishes."

"Optimizing the chuck roll should be great for consumers, operators and retailers, processors, packers, steak cutters and beef producers..."



The first round of value cuts experienced dramatic growth in both foodservice and retail channels. To date, cuts like the Flat Iron, Petite Tender and Ranch Steak have been menued in about 20,000 U.S. restaurants and sold in some 9,900 grocery stores across the country.

BIG is a team of culinary professionals, food scientists, marketing, operations and research experts working together to inspire beef and veal product innovation and facilitate success by providing information, insights, ideas, science and tools to the beef industry. Visit www.beefinnovationsgroup.com for more information. **LB**

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New information for an "egg"-citing industry

The egg industry has been in existence since man first realized he could in fact consume its contents, but it took until now to really understand and predict the market. For the first time, OBSONO is proud to offer their Egg and Feed Outlook Report. Together with Urner Barry Publications and Cattle-Fax, this latest product from OBSONO's egg and feed analyst Bill Lapp is designed to provide its readers with an in-depth

look at what has gone on in the egg and feed industries, as well as what to expect going forward. Bill Lapp, has over 25 years experience in analyzing and forecasting economic conditions and commodity markets with a specialty in the economic analysis of egg, grain, livestock and dairy markets.

"These reports provide a big picture view of not only where the markets are... but most importantly where you can expect them to go."

which fuel this highly complex industry. These reports provide a big picture view of not only where the markets are now, but also why, and most importantly where you can expect them to go and the key factors that will drive them there.

Each report includes market recaps, price history and projections, production history and projections, grain information, commentary on market conditions and live interactive quarterly Webinars. The live Webinars have proven to be a great success in other applications as they deliver a level of expertise and intimate industry knowledge to the egg industry via the personal touch of a live interactive.

ABOUT URNER BARRY

Urner Barry is a business publisher specializing in the reporting of market quotations and news to clients in the poultry, egg, meat, seafood, and related segments of the food industry. Urner Barry offers market reports via mail, e-mail and Internet, as well as books and other media intended to make you a more informed buyer or seller of food products.

ABOUT OBSONO

OBSONO blends the experience and talent of Cattle-Fax and Urner Barry Publications to provide information, education and insight that allows companies to identify market opportunities and recognize developing trends in the beef, pork, and poultry and egg industries. OBSONO's reports give concise information and forecasts needed to formulate market strategy. **UB**



Included in each quarterly report is a complete examination of the shell eggs markets as well as breaking stock and egg products. There is also a special section devoted entirely to the feed situation and the grains, corn and soy,

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It began as a small family business in the city of Celaya, Guanajuato.

Fundada en 1976, Empacadora Celaya es una de las principales productoras de carne delicatessen en México.

Inició como un pequeño negocio familiar en la ciudad de Celaya, Guanajuato.

To keep up with increasing consumer demand, Empacadora Celaya is currently expanding its processing plants to double production.



One of the company's most successful brands, offers a complete line of high-quality ham and deli meats at very competitive prices.

It is marketed under the slogan: "Capistrano: Freshness and Nutrition", which clearly demonstrates the commitment to the company's mission statement: "Our goal is to proudly satisfy each and every customer order while satisfying the nutritional needs of society."

Additionally, Empacadora Celaya offers a full line of products from a host of their family brands, all with the same excellent quality.



Al día de hoy, Empacadora Celaya ha experimentado tal crecimiento que su planta procesadora se está expandiendo, con la intención de duplicar sus niveles de producción.

Capistrano una de las marcas más exitosas de la compañía, ofrece una línea completa de jamones y carnes frías delicatessen a precios muy competitivos.

Promocionada bajo el slogan "Capistrano es fresca y nutrición", demostrando su compromiso con la misión de la empresa:

"Cumplir orgullosamente con cada compromiso establecido con nuestros clientes, satisfaciendo las necesidades de nutrición de la sociedad".

Adicionalmente, Empacadora Celaya le ofrece una gran variedad de productos en otras marcas de excelente calidad.



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What's left may not be right for consumers

By guest author Steve Suther,
CAB Director of Industry Information

The year 2007 may be remembered for its narrowing Choice/Select boxed beef cutout spread, as reported by *Urner Barry's Yellow Sheet*. Its final estimated average of about \$9.00 per hundredweight (cwt.) is the lowest since the 2004 average of \$8.79/cwt.

However, the spread between premium Choice and "commodity Choice" has maintained greater stability. Indeed, the difference in total cutout value for the Certified Angus Beef brand over Choice was greater than the Choice/Select spread in both July and September 2007, when both were in the \$6 to \$7 range.

Whatever the other causes, one might consider the impact of greater shares of branded product being pulled from the supplies of Choice beef. Even without this factor, most Choice beef falls into the lower one-third category. Now look at what happens when you take out all, or even most, of the product with high enough marbling to meet some brand standard:

Among "A-Stamped" Carcasses, Mean Marbling Scores

Change if you remove Modest⁰ and above

100%	397.6
75%	411.4
50%	423.2
0%	442.4

Change if you remove Modest⁰ and above and 50% of Small⁵⁰

100%	388
75%	404
50%	418
0%	442.4

Certified Angus Beef LLC conducted a national consist study in 2004-05, a period with a Choice/Select spread similar to the 2007 level. Data from that survey showed an average (mean) Marbling Score of 442.4, or low Choice for all of the Angus-influenced cattle from across the Midwest and Great Plains.

If just half of the Modest⁰ and above (500+) product is pulled out to supply the increasing number of brands, marbling

The boxed beef cutout

A compilation of market values for cuts of beef and the amount of the carcass that they comprise. The boxed beef cutout is a benchmark for overall beef market direction.

\$/cwt

(Abbreviation for dollars per hundredweight) The amount of dollars it would take to buy 100 pounds of beef.

Choice to select spread

The difference in price between choice product and select product.

drops by 19 points. Many brands are going with Small⁵⁰ (450+) product. If 75% of all such potential Angus brand-eligible beef leaves the mix, what's left is barely at the Choice level.

If all of it is siphoned off, the average Marbling Score of the remaining "Angus" product is well down into the Select grade

level, at 388 (Slight). A similar phenomenon is occurring within the premium non-Angus mix.

In 2006, CAB industry data show that the share of Small⁵⁰ or better pulled out to fill USDA certified brand needs amounted to 52.7% of all that certified branded supply and 11.7% of all fed cattle.

Based on National Beef Quality Audit and USDA numbers, 35% of Choice beef is Modest⁰ or better, until the sort for branded programs. That cuts the share of top Choice product in the Choice box by more than half, to just 15%.

When all beef costs more, consumers see more risk in the purchase of any cut. More and more, consumers say beef doesn't taste as good as it used to. Maybe that's because their once-favorite store or restaurant is only offering commodity leftovers. **UB**

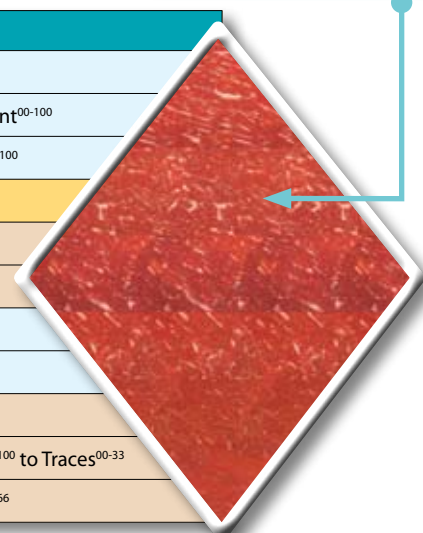
"... consider the impact of greater shares of branded product being pulled from the supplies of Choice beef."

The quality grade of a cut of meat is determined, in part, by the amount of marbling the cuts possesses. Within a specific **quality grade category** there are several **"marbling" categories**.

Commodity choice product can be produced from any marbling category within the **choice quality grade**.

Some branded programs draw product from the **best part (highest marbling scores)** of the choice grade.

GRADE	MARBLING SCORE
Prime +	Abundant ⁹⁰⁻¹⁰⁰
Prime °	Moderately Abundant ⁸⁰⁻¹⁰⁰
Prime -	Slightly Abundant ⁷⁰⁻¹⁰⁰
Choice +	Moderate⁶⁰⁻¹⁰⁰
Choice °	Modest ⁵⁰⁻¹⁰⁰
Choice -	Small ⁴⁰⁻¹⁰⁰
Select +	Slight ⁵⁰⁻¹⁰⁰
Select -	Slight ⁴⁰⁻⁴⁹
Standard +	Traces ³⁴⁻¹⁰⁰
Standard °	Practically Devoid ⁶⁷⁻¹⁰⁰ to Traces ⁰⁰⁻³³
Standard -	Practically Devoid ⁰⁰⁻⁶⁶



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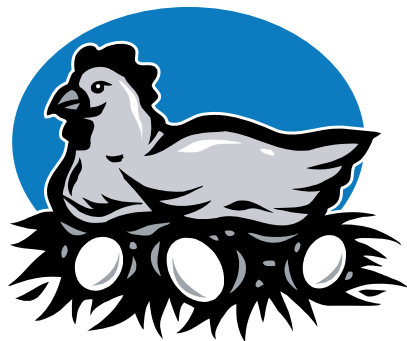
China and U.S. respond to food safety issues

By now we are too familiar with the seemingly endless problems with Chinese exports to the U.S.

Going forward, we will look at what is being done to safeguard the Chinese seafood exports to the U.S. The effort can be broken down into three areas.

*What is China doing there?
What is the U.S. doing in China?
What is the U.S. doing here?*

First, it is important to understand just what action the FDA took regarding seafood. Initial press reports were that the "U.S. had banned Chinese seafood imports." What the FDA did on June 28th, 2007, was to put certain farm-raised seafood items including catfish, shrimp, and basa on automatic detention "until the shipments are proven to be free of residues from drugs that are not approved in the United States."



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The FDA will allow the importation and distribution of these products if they are found to be free of contaminants. Further, if an individual Chinese exporter can prove that they have taken steps to ensure product safety they can be issued a "green ticket" from the FDA which will exempt them from automatic detention.

So what is China doing there?

Despite some initial resistance to FDA's tough stance on some imported farm-raised seafood, China seems to have gotten the message on food safety. Almost immediately the licenses of hundreds of food producers were revoked. Beginning in early October the Chinese Ministry of Agriculture imposed tough new standards on seafood for export. The UN's World Health Organization said that China is making good progress on solving its food safety problems. However, traceability challenges still exist in China. Although processing is centralized and can be monitored, the most significant problem exists at the ponds where farmers must be educated to use good aquaculture practices and avoid the use of banned antibiotics and chemicals.

What is the U.S. doing in China?

NOAA's National Marine Fisheries Service has inspected and certified seven

processing plants in China over the last several months, and more inspections are scheduled in the near future. A full-time seafood inspector has been assigned to Hong Kong and communication with Chinese authorities has been increased to alert each other to problems with imports.

Further, the FDA and Chinese authorities are working on a joint agreement, called a memorandum of understanding, that would specify certain areas of government to government cooperation, such as which Chinese laboratories would be accredited by the FDA to do testing, and how would these laboratories be monitored.

What is the U.S. doing here?

FDA is charged with the task of making sure imported seafood from China is safe, and of course

they have instituted automatic detention. In September the FDA

exempted the first Chinese shrimp producer from import restrictions after inspecting its facilities. The FDA is evaluating a number of additional Chinese producers, and more are expected to earn the ability to bypass automatic detention.

Finally, the scrutiny of Chinese food exports not only by the U.S., but by Japan and the EU has added to the pressure on China to preserve its reputation.

The 2008 summer Olympics in Beijing are shaping up to be a major international event for the Chinese, and any possible problems, such as an issue of food safety, would be unwanted. This is putting huge pressure on the Chinese government to put its house in order, and it will go a long way to ensuring that legitimate manufacturers and exporters take all necessary steps to secure the safety of their supply chain. **UB**

"China is making good progress on solving its food safety problems."

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Top stories based on subscriber hits September 21, 2007 through December 21, 2007

1. **SCOM** - Arkady Gontmakher, biggest U.S. importer of Russian king crab, arrested in Moscow in major crackdown - 9/26/07
2. **LN** - Good Morning America bashes imported seafood with help from Alabama's Ag commissioner - 11/7/07
3. **SCOM** - A blatant double standard hits the seafood industry (editorial comment) - 10/17/07
4. **SCOM** - Trends quite negative for pollock stock in 2008 - was major surprise at Groundfish forum - 10/23/07
5. **SCOM** - Alaska king crab fishermen accept 'disappointing' price, begin fishing (Fish Radio) - 10/17/07
6. **SCOM** - Some seafood import time-bombs put into just passed FDA bill - 9/24/07
7. **SCOM** - FBI investigating Stevens' fishing earmarks, including \$100 million crab buyback, Adak, and Fisherie - 10/31/07
8. **SCOM** - Bye Bye Byrd Amendment - 10/2/07 - 283
9. **SCOM** - Preferred reports full truckload of lobster tails stolen out of Medley, Fla facility - 9/28/07
10. **SCOM** - The dog that didn't bark: industry takes Bering Sea pollock and cod cuts in stride (news analysis) - 12/5/07

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The next big thing in shrimp farming?

During the late 1980s and early 1990s commercial production of Black Tiger shrimp in Asia grew tremendously. However, in 1996 commercial production of white shrimp began to ramp up in Asia and now, white shrimp production dominates the world's farm-raised shrimp supply. White shrimp became the preferred specie because larvae could be successfully bred in hatcheries while realizing better survival, growth rates and yields than other species.

Today, Moana, a leading aquaculture company in the development and supply of genetically improved and disease-free seed of Black Tiger shrimp, is attempting to stabilize their production. Moana's innovative approach through pedigree-based selective breeding (non-GMO), fills today's need for sustainable production and fully traceable supply of quality seed throughout the value chain.

A limiting problem in farming Black Tiger shrimp has been the reliance on wild brood stock. In year 2000, Moana began the work of building a genetic improvement program to address this issue. A large Nucleus Breeding Center dedicated to this work was built in Kona, Hawaii. The domestication of the Black Tiger shrimp and development of a disease-free founder stock took several years. By 2004 a genetic selection program, with the largest collection of founder stock ever attempted in shrimp, had taken shape. Today, Moana is the leading company in this industry. Their ongoing pedigree-based family selection program is founded on the world's largest and most diverse collection of Black Tiger stock.

In 2007, Moana launched the production of genetically improved and disease free post larvae in the countries of Vietnam, Thailand and India. The Moana parent stocks are now grown in these countries to produce post larvae for the farmers in 2008.

Successful trials of Moana post larvae on commercial farms have shown harvests with substantially higher survival, faster growth, and greater yield when compared to the production using post larvae from wild parents. The Moana post larvae will not only benefit farmers by achieving better results, but will also be fully traceable being from a domesticated and pedigree source. In 2008, Moana post larvae will be available for farmers in these countries to be grown on their farms for shrimp consumer's worldwide.

"A limiting problem in farming Black Tiger shrimp has been the reliance on wild brood stock."

Moana continues its genetic improvement work as well as research into the fundamental biology of the Black Tiger Shrimp. The

company has several research projects in the area of molecular genetics, physiology, health, and nutrition. Moana also applies farming technologies both on its own and in collaborations with leading institutions in the USA, Asia and Europe. The final result of Moana's efforts will be the availability of a reliable, high quality Black Tiger shrimp supply for the world market, from a modern and sustainable farming industry. **UB**

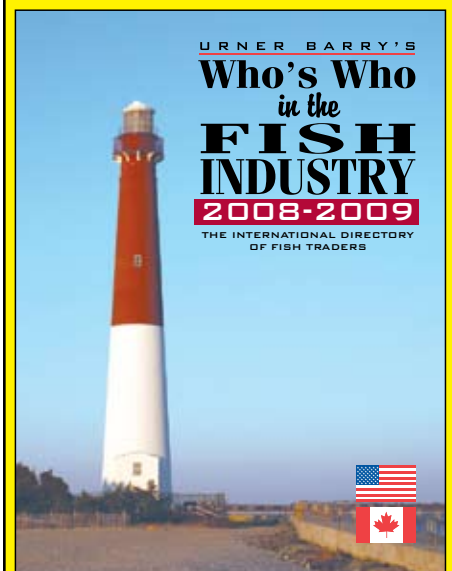


Moana site, Kona, Hawaii



Black Tiger Shrimp

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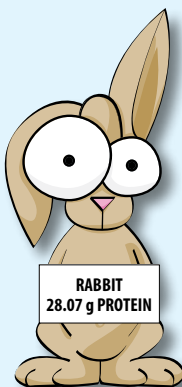
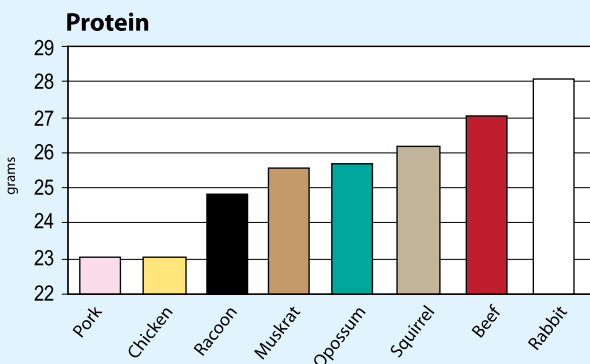
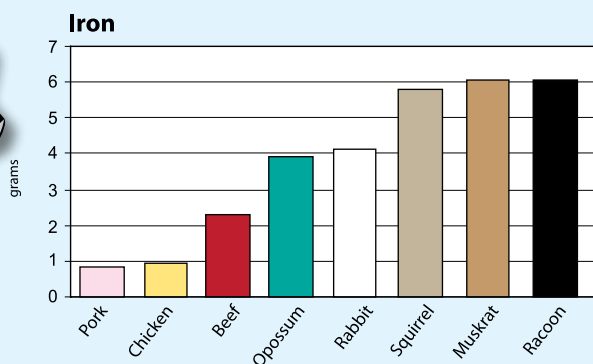
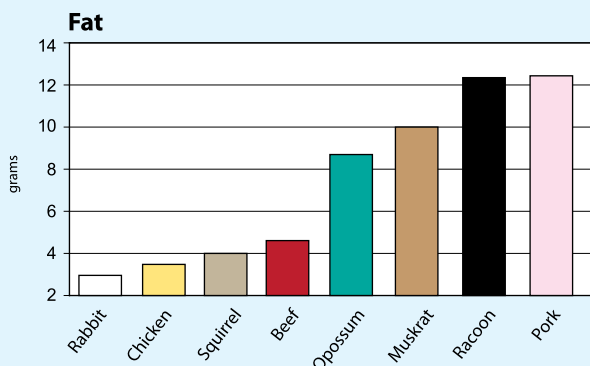
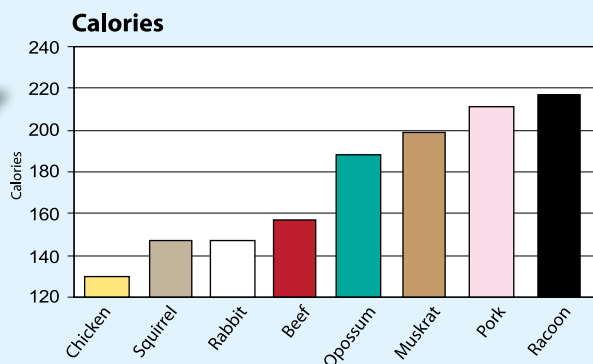
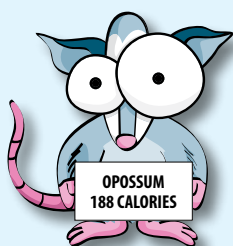
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Menu makeover: squirrel

Nutritional values compared

Values reflect roasted meat for one serving of comparable cuts. Source: USDA nutrient database



Squirrel – it's what's for dinner. No, this isn't mocking the famous beef slogan; it really is what's for dinner for an increasing amount of Americans. Consumption of squirrel meat is on the rise and is considered a favored meat in many parts of the country. Many even view it as a delicious alternative to the traditional forms of protein.

The squirrel is a member of the rodent family Sciuridae. Many different varieties, sizes and colors exist, with the most common being the grey squirrel which sports a grey coat and a tail about the size of its body.

According to those in the know, grey squirrels are more tender to eat than other varieties. All squirrels over a year old will most likely be tough, however, there are plenty of recipes designed to make even the toughest squirrel tender. Since squirrel is considered white meat and its taste is reportedly similar to chicken, it can easily be a substitute for chicken in recipes. Squirrel is also said to be less greasy than chicken with a firmer feel. As with any wild game, if handled and cooked correctly it will offer a fine dining experience.

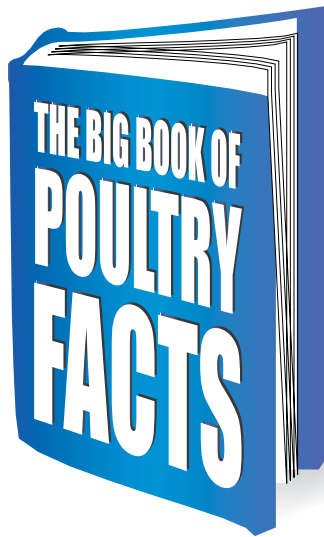
“Squirrel can easily be a substitute for chicken in recipes.”

According to the American Heart Association, squirrel meat significantly helps lower cholesterol because of its higher percentage of cholesterol-reducing polyunsaturated fatty acids. Game meat, in general, has a higher content than domestic meat of Eicosapentaenoic acid (EPA), an Omega-3 fatty acid. It is a good type of oil, sometimes referred to as fish oil, which is thought to help to reduce the risk of atherosclerosis—the leading cause of heart attacks and strokes. **U**

MENU

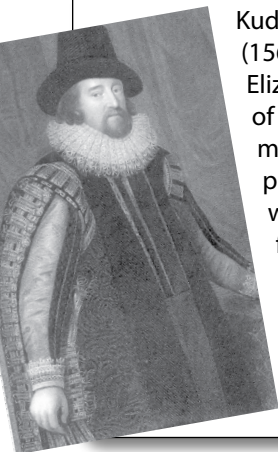


Test your poultry knowledge



1. It takes a laying hen 24 to 26 hours to produce an egg. T or F
2. Eggs age at the same rate at room temperature as they do in the refrigerator. T or F
3. Chicken drumsticks have a lower ratio of meat to bone and skin than other parts of a chicken. T or F
4. The greatest number of yolks in one chicken egg was nine. T or F
5. Baby turkeys are called:
A. peachicks
B. poults
C. fledglings
D. jennys
6. The heaviest recorded weight of a domestic turkey was...
A. 68 pounds
B. 77 pounds
C. 86 pounds
D. 93 pounds
7. The average 15 pound turkey typically has
A. 50% white meat and 50% dark meat
B. 60% white meat and 40% dark meat
C. 70% white meat and 30% dark meat
D. 80% white meat and 20% dark meat
8. Turkeys can see movement almost
A. 25 yards away
C. 50 yards away
B. 75 yards away
D. 100 yards away
9. The long fleshy growth that hangs down from the forehead over the turkey's beak is known as a...
A. wattle
B. gizzard
C. hackle
D. snood
10. On a quiet day, a gobbling turkey can be heard up to...
A. ¼ mile away
B. ½ mile away
C. 1 mile away
D. 2 miles away

UB Fast Fact



Kudos to Francis Bacon (1561-1626)! The Elizabethan champion of the scientific method died in pursuit of a better way of preserving food. He caught a severe cold while attempting to preserve a chicken by filling it with snow.

Answers

1. True
2. False
3. True
4. True
5. B. Poults

Poults are tan and brown in color. They are hatched from buff-colored eggs, lightly spotted with brown and black that are twice the size of a chicken egg. The eggs hatch in 28 days. Peachicks are baby peafowl, fledglings are baby eagles, and jennys are female turkeys.

6. C. 86 pounds

The bird of this immense size was grown in England in December, 1989. He was about the size of a large German Shepherd.

7. C. 70% white meat and 30% dark

The white meat of the turkey is generally preferred in the United States while dark meat is preferred in other countries.

8. D. 100 yards away

Turkeys have excellent visual acuity. They possess a wide range of vision of about 270 degrees which makes them hard to sneak up on. Turkeys can see colors. They do not see well at night. Turkeys have great hearing capabilities and an excellent sense of taste. They have a poor sense of smell.

9. D. snood

A wattle is the bumpy skin on a turkey's neck. Hackles are long, narrow feathers on the neck or saddle of a bird. A gizzard is the thick-walled muscular pouch in the lower stomach of many birds that helps to grind up food, often with the aid of ingested grit and stones.

10. C. 1 mile away.

Males, or toms, gobble. Females, hens or jennys, do not gobble. Instead, they make a clicking noise.

Breaking and entering a new niche...

Old favorite finds a new outlet

Beef jerky isn't just for roadside stands and truckstops anymore, now it's for inmates too! This hugely popular snack is now being produced by inmates associated with Colorado Correctional Industries program.

That's right, inmates with the prison industry program are being put to work to learn job skills associated with the meat drying process. Why are inmates producing jerky? Steve

Smith acting director of Colorado Correctional Industries quite simply said it was for the profit.

"When we sell cows at auction we get \$800 per cow. When we send cows to

"...inmates with the prison industry program are being put to work to learn job skills associated with the meat drying process."

the meat market, we double the profit to \$1,600 per cow," Smith said. Each month approximately 25 cows are sent to market to be sold for meat.

With the help of Jensen's Blue Ribbon, a Fowler meat processing plant, the cows are made into beef sticks. The market uses the whole cow for the sticks – steaks, roasts, cheeks, etc. 5,900 sticks of jerky are produced from one cow."

Smith says his plan is to supply the prison canteens with Correctional Industries beef sticks. With state prison inmates purchasing 17,000 beef sticks per month, the inmates alone would consume three cows worth of beef sticks.

"We did a test market with the beef sticks, giving inmates samples and they responded very well. We will siphon off whatever number of cows Jensen's can produce to supply the inmate population as a base

market, plus take the beef sticks to other markets, Smith said.

No tax dollars are used for the Correctional Industries programs, they are all self-supporting, with the profits remaining after costs going back to the programs.

Additionally, Smith said that none of this would be possible without the continued support of Canon Minimum Centers Warden Ron Leyba, as well as the head of the state's prisons system, Ari Zavaras, who also supports the programs. "He likes Correctional Industries programs because they teach a trade and work ethics to inmates and that helps reduce recidivism," Smith concluded. **LB**



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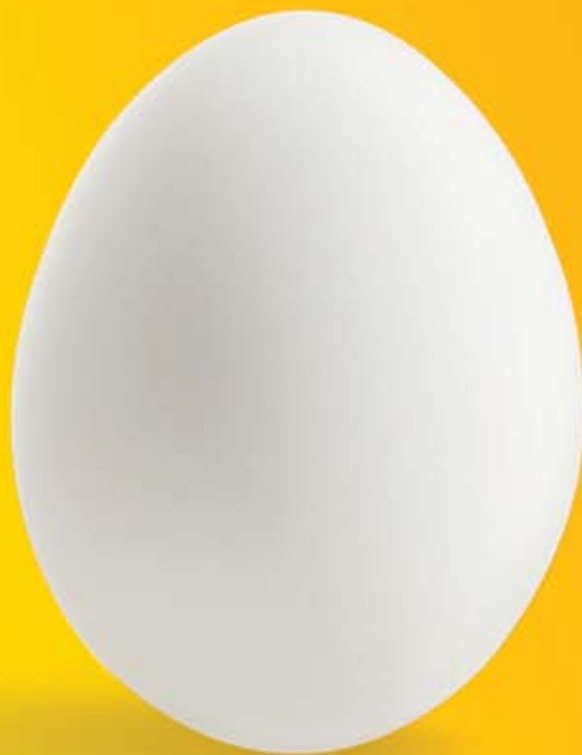
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Organic market: carving a larger niche

While still small, the organic food market is growing at a rapid pace. An online survey from market researcher Mintel shows that recent health and food safety concerns have increased the demand for organic foods.

Buying organic isn't just for the health conscious anymore. It is now part of mainstream America's diet. Baby boomers, ethnic groups and teens are all looking for more natural food and drinks.

Mintel values the organic food and beverage industry at nearly \$6 billion. They say that since 2002 organic food sales have increased 132 % and organic beverages have increased 97 % since that same time period. Sales of organic meats have increased more than tenfold in the past five years. Moreover, the

sales estimates for 2007 are \$364 million, compared to \$33 million in 2002.

"The desire for organic meat products is based on a general sense that the food supply has the potential to be unsafe," the report states. "But demand has more than outpaced production, and the U.S. market for organic meats has become highly import-dependent."

According to the report, challenges facing the U.S. organic meat industry are high production costs involved in producing and processing organic meat products, the lack of certified slaughterhouses and processing plants, and inadequate distribution

"Challenges facing the U.S. organic meat industry are high..."

infrastructure. Another stumbling block to market expansion are the high prices that organic foods continue to command.

Mintel's survey shows that just over half of all Americans said they purchased organic in the last year, compared to 34 percent in 2002. The industry has already stepped up to this increased demand as some 1600 products were launched in the last year. Most retail stores have over 300 private label organic products available with entire departments dedicated to the category.

The organic market is forecast to continue its consistent growth, but at a declined rate. It predicts sales in that segment to increase 59 percent by 2012.

"Organics will undoubtedly continue to thrive, but there are hints that the industry may face increasing challenges," says Marcia Mogelonsky, Mintel's senior research analyst. **UB**



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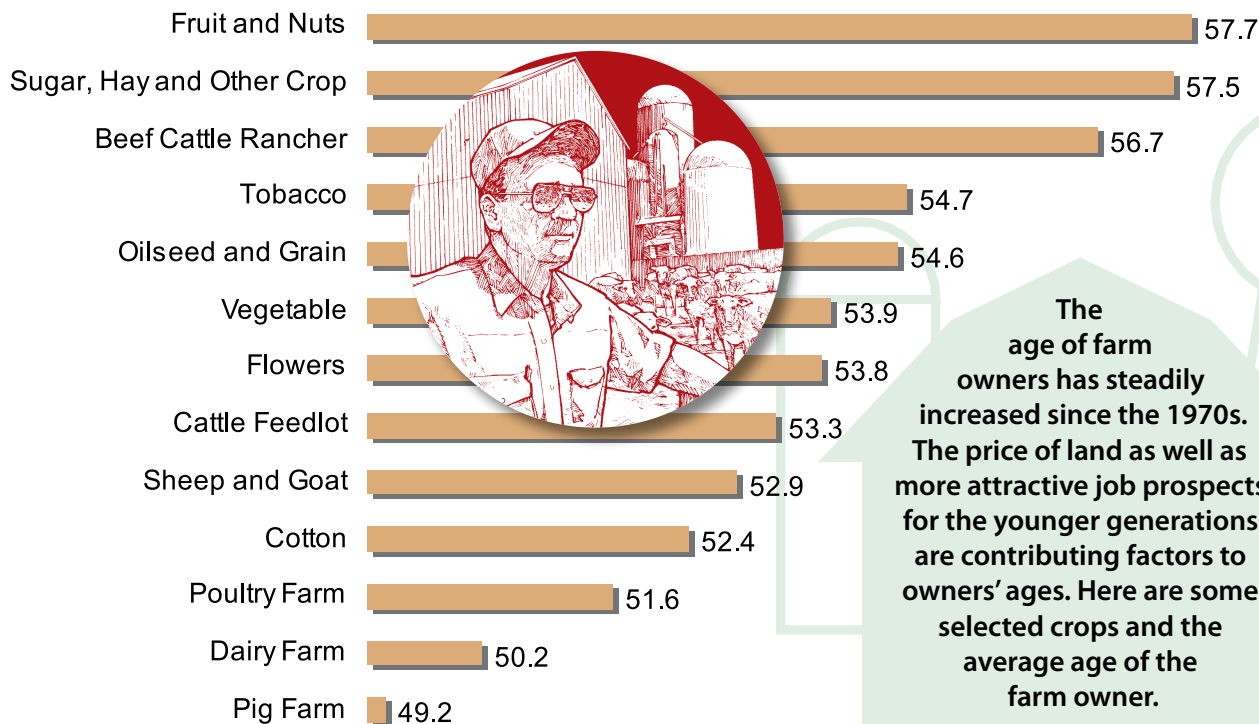
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New meaning to the tune "Old MacDonald had a farm"...

Average age of farm owners



Source: NASS



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The protein 77 percent of consumers want...

Get tapped into turkey trends at www.eatturkey.com

Article contributed by
National Turkey Federation

There is no doubt that turkey is enjoying a strong presence in the foodservice industry, with 81 percent of commercial operators reporting that they currently offer turkey items on their menu (*Restaurant Hospitality*, 2007). Clearly, it is recognized as a profitable and popular protein.

This popularity is well justified. Known as "The Perfect Protein," turkey boasts a unique combination of features that make it appealing to chefs: it is a healthy, highly versatile and a great-tasting option. The National Turkey Federation's (NTF) award-winning Web site, www.eatturkey.com, is rich with expert resources specifically designed to help foodservice professionals tap into the benefits turkey brings to a menu.

More than 800 standardized foodservice recipes ensure there is never a shortage of fresh ideas. The database is a searchable, photo-rich collection of recipes that comes straight from the menus and kitchens of chefs from across the country. Subscribing to the monthly recipe e-mail delivers a favorite seasonal recipe to your fingertips, along with turkey trends and industry news.

"Turkey allows us to be innovative... and lets us use new cooking techniques."

The "Turkey Trendsetter" Web area recognizes accomplished culinary professionals whose successful, creative uses of turkey entice customers. Currently, nine "Trendsetter's" share their wisdom, including their on-trend turkey recipe.

"Turkey Trendsetter" Rick Bayless, chef-owner of the award-winning Frontera Grill in Chicago, Ill., finds that turkey adds diversity to menus. "Turkey allows us to be innovative because it has a richer flavor, a

different texture and lets us use new cooking techniques," says Bayless. His Classic Red Mole with Turkey Breast recipe masters the marriage of bold taste with healthier fare.

An NTF online survey (November 2005) revealed that 77 percent of consumers would order turkey when dining out if it was offered on the menu, proving that this healthy-savvy, heart-happy profile is exactly what many Americans look for in food. For example, turkey breast meat is free of saturated fat, high in protein and nutrient-rich.

The Web site also offers an informative multimedia presentation that lets visitors tap into the ways that turkey fits with consumer diet interests. Registered Dietitian Erin Boyd offers insight on health trends and underlying nutrition concepts in order to satisfy current customers and attract new ones. "Turkey is great way to offer satisfying, creative dishes that are lower in calories and fat," remarks Boyd.

Eatturkey.com's featured product series consolidates useful information and on-trend recipes on a variety of turkey cuts. Any operation can always benefit from consulting the full "Turkey Foodservice Manual & Curriculum," a reliable guide to turkey cooking techniques, food safety principles, international cuisine and more. Throughout the year the site also posts specialty resources, such as its "Holiday Menu Planning Guide."

"Chefs have always embraced the flexibility of turkey products, nevertheless NTF will continue to be amazed by the novel uses we see at restaurants across the country," said Sherrie Rosenblatt, NTF's vice president of marketing and communications. "It can be a very lively protein on menus."

Versatile and healthy, turkey cooks-up



dishes for every nuance of consumers' changing tastes and lifestyles. Visit www.eatturkey.com for access to this extensive library of online resources. **UB**



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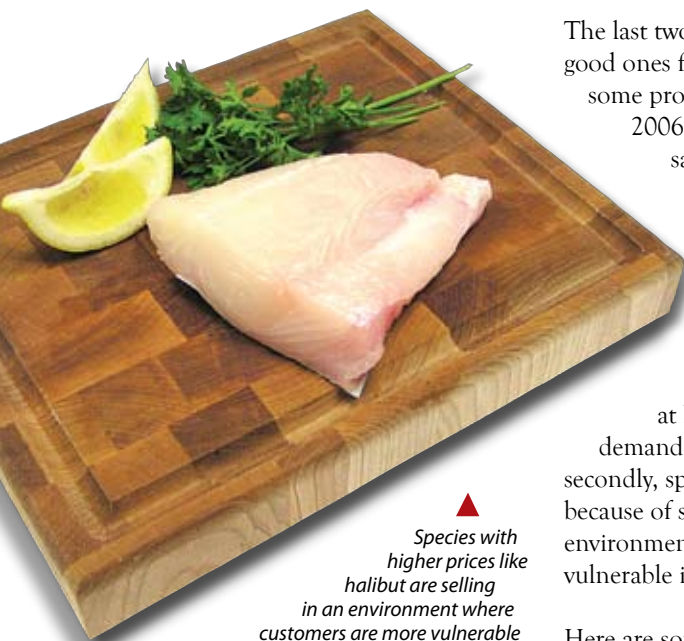
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Seafood outlook problematic for 2008 as economic uncertainty grows



▲
Species with higher prices like halibut are selling in an environment where customers are more vulnerable if there are economic shocks.

The last two years have been relatively good ones for most seafood sellers. Despite some problematic species—crab in 2006, catfish in 2007—overall, both sales and margins have been increasing.

Preliminary indications are that 2008 may be a more difficult year. For one thing, a number of species are now trading at lower prices, even though demand remains relatively strong. But secondly, species with higher prices, usually because of supply issues, are selling in an environment where customers are more vulnerable if there are economic shocks.

Here are some examples: In December of 2007, fresh Chilean salmon fillets were selling at 19% below their prices the previous January.

Fresh tilapia fillets are 5% lower than last January and 13% below their highest price in 2006. Frozen tilapia's average price for 2007 is lower than in 2006, and current prices are 3% below the highest prices in 2006.

Most shrimp are trading at lower average prices in 2007 than in 2006, except where there are supply issues. There was a shortage of black tiger shrimp this spring, with correspondingly higher prices. Also, there is the chance that the poor Mexican and domestic Gulf landings will boost shrimp prices as well.

Fish in shorter supply, like cod, halibut, and even Alaska pollock, are all near their highest price points in the last several years—driving away customers.

The general trend shows a softening of pricing for all seafood commodities that are in fairly good supply, almost across the board. At the same time, prices for short commodities, like cod and halibut, crab and some types of shrimp have jumped. Sometimes they are well above the levels

where customers are comfortable or able to keep programs going, which leads to pressure to find lower priced substitutes or cut back on sales. This opens the industry to vulnerability for 2008, especially given economic problems such as high fuel costs and the current housing lending market. More and more experts think this could lead to a serious consumer pullback and a possible recession.

Concurrently, U.S. seafood buyers have to contend with the low value of the dollar. It is making seafood more expensive when customers are less and less able to handle increased prices. So for example, the strengthening Canadian dollar will mean that crab producers will demand more U.S. dollars for their products in 2008—regardless of how demand develops. If the markets are soft, price declines will be less than they otherwise would have been.

Whitefish buyers are going to face increasing prices due to the ability of European buyers to outbid them on cod and pollock.

The further reduction in Atlantic cod landings in Iceland, for example, will mean even more Alaskan cod goes to the salt fish markets—at higher prices.

So, the industry is in a weaker position to deal with economic shocks because increased prices and margins are being pushed by supply shortages, not increased demand. Yet an economic shock can turn a shortage into a surplus very quickly once prices become untenable. That is why 2008 may ultimately prove a more difficult year for seafood buyers and sellers. **UB**

Adapted from an article by John Sackton which originally appeared on Seafoodnews.com on November 5, 2007

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The center-of-the-plate choice... ..

Talkin' turkey in Israel

When thinking about the top turkey consuming countries of the world the first ones to mind would no doubt be the United States, Mexico or perhaps a country in the EU, right? Sorry, but when it comes to turkey consumption Israel is tops.



At about 37 pounds per person, Israel is the world's leader in per capita turkey consumption. For comparative purposes, the United States consumes about 17 pounds per person, or less than half of what the average Israeli consumer eats each year.

So why is turkey such a popular center-of-the-plate choice for Israel's 7.2 million inhabitants? To begin with, religion plays a leading role in Israel's appetite for turkey.

One of the best known foods forbidden under traditional Jewish dietary law is pork. According to the

"...kibbutz farmers made barren lands blossom harvesting field crops, orchards, poultry, dairy and fish."

CIA's World Fact Book, 76.4% of Israel's inhabitants are Jewish. As a result, Israel severely restricts the importation and consumption of pork. That leaves two other prominent proteins—poultry and beef. Beef, however, is a relative newcomer to Israel, and although demand has advanced to over 37 pounds per capita, much of the increased demand is a result of population growth (16% in the period) and increased standard of living. Additionally, fresh beef was limited to domestic slaughter of dairy culls and cattle from Israel's small 50,000-60,000-head beef herd until the mid-1990s when imports of frozen beef began.

Both religion and beef's relatively new status therefore make poultry the center-of-the-plate choice for Israel's largely Jewish

population. There are other factors that play key roles as well. Israel's climate, for one, is very similar to the U.S.'s leading turkey-producing states like North Carolina and Arkansas. The temperate atmosphere allows for good year 'round growing conditions. Secondly, and perhaps more importantly, may be Israel's tradition and culture.

Synonymous with Israel's tradition is communal living on a kibbutz. Over the years, kibbutz farmers made barren lands blossom harvesting field crops, orchards, poultry, dairy and fish. Turkey is an ideal meal for feeding larger groups and it only takes 14 weeks to grow a protein that could feed up to 15 people. Kibbutzim have pooled their resources, establishing



regional enterprises such as poultry-packing plants. Through a combination of hard work and advanced farming methods kibbutzim backed poultry plants account for a large percentage of Israel's poultry output to this day.

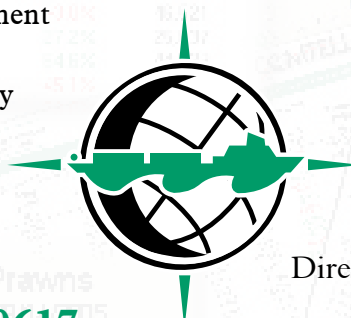
Traditional culture, religion and climate all play a key roles in explaining how a country slightly smaller than New Jersey consumes more than 266 million pounds of turkey each year. These same factors, plus a strengthening standard of living and continued population growth, will ensure that turkey will maintain Israel's leading center-of-the-plate status among its people for years to come. **UB**

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What seems to be skewing the cattle trend?



The Cattle Cycle - it's been called one of the most predictable cycles in agriculture. Essentially it is an 11-year cycle from peak to peak, and reflects the time it takes for animals to grow and the time it takes for cattlemen to react to economic signals.

When cattlemen want to expand their herd, they accumulate females for calving. Once this starts, it takes about two years for cows to enter the beef production chain. In all, it takes about six years for the cyclical expansion of the herd to take place.

Eventually, the herd size swells. Cattle market prices decline and cattlemen start culling their herd because it is no longer profitable to own and sell cattle. This is the liquidation phase and can take about five years from beginning to end.

During all of this, market participants look at the heifer slaughter for an indication

of how the cattle cycle is progressing. Farmers will either keep heifers (female cattle) for breeding or send them to slaughter plants. The current cycle has had a very short expansion phase leading to the distortion of the cattle cycle.

In part, this is a result of drought throughout much of the country. Cows graze on pastures. When pasture conditions are poor, as they have been for the

past few years, farmers will send animals to slaughter. Higher feed costs also affect farmers' willingness to keep animals. This resulted in a short expansion phase.

There has also been some speculation that the escalating price of real estate is also

contributing to the departure of cattlemen from the business. For many, it's becoming increasingly attractive to "sell the ranch"

Seeing the current generation of cattlemen struggle, the next generation is also opting out of the business. Data from the National Agricultural Statistics Service shows the average age has progressively increased since the 1970s.

Time will tell if these conditions are simply skewing the cattle trend for one cycle or if it is being permanently altered. In the meantime, those who track the beef markets need to be aware that these factors are changing dynamics of the market. **UB**

"The current cycle has had a very short expansion phase leading to the distortion of the cattle cycle."

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60 seconds with...

Wesley Batista

With the acquisition of Swift and Company, JBS has become the biggest beef processor in the world operating plants in the United States, Australia, Argentina and Brazil. In this interview Wesley Batista, the new CEO of JBS Swift, gives his views on the beef business as his company ushers in a new era.

URNER BARRY'S REPORTER: What is your vision for JBS Swift?

WESLEY BATISTA: We see a great opportunity to put the company in the highest level of operational efficiency in the industry. We also want to take advantage of the strength and recognition of the Swift brand globally. Finally, we believe that Swift will allow JBS to be



Swift & Company

one of the most important players in the worldwide red meat business.

UBR: What challenges do you see facing the global beef industry, the U.S. beef industry, the Australian beef industry?

WB: (Globally) The main challenge is to stimulate the global demand for beef and also improvements in the global sanitary conditions. (USA) Regain full access to the markets closed or partially closed to U.S. beef after BSE. (Australia) Keep its status of being the only major beef producing country in the world with access to the entire world's demand.

"...we believe that Swift will allow JBS to be one of the most important players in the worldwide red meat business."

UBR: What challenges are ahead for JBS Swift?

WB: Get Swift to the same or better level of operational efficiency and cost structure of the top players in this industry.

UBR: How is the U.S. meat business different from what you have experienced in South America?

WB: The main difference is that cattle in the U.S. are 100% grain fed vs. mostly



grass fed in South America. The focus and actual scales here are also much larger than what they are in South America.

UBR: How is the business in Australia different from South America?

WB: The Australian business is very much similar to the South American model, with the exception that they have full access to the Asian markets.

UBR: Many people are saying that the U.S. beef industry actually needs to see a contraction in packing capacity to make the sector (packing) more profitable. At the same time, there are reports that Swift may add a shift in the Greeley, CO plant. How do you see making this work?

WB: Indeed the U.S. beef industry has overcapacity. But Swift is the only company today that is operating way under its capacity (and the industry's average use). For this reason, the other players should rethink its capacity utilization, while Swift is allowed to readjust its volumes in order to be at the same level of operational efficiency (cost vs. volume) of the other players.

UBR: In what area do you see the next expansion opportunity for JBS as it relates to their U.S. or Australian holdings?

WB: The market will always provide us with expansion opportunities. We cannot say at this time specifically what is out there, but we are always looking for expansion opportunities.

UBR: Do you have any interest in owning feedlots in the U.S. or Australia?

WB: We already own four feedlots in Australia. In the U.S. our focus is on turning around the beef business, bringing it back to the desired optimized efficiency. **UB**

R V T

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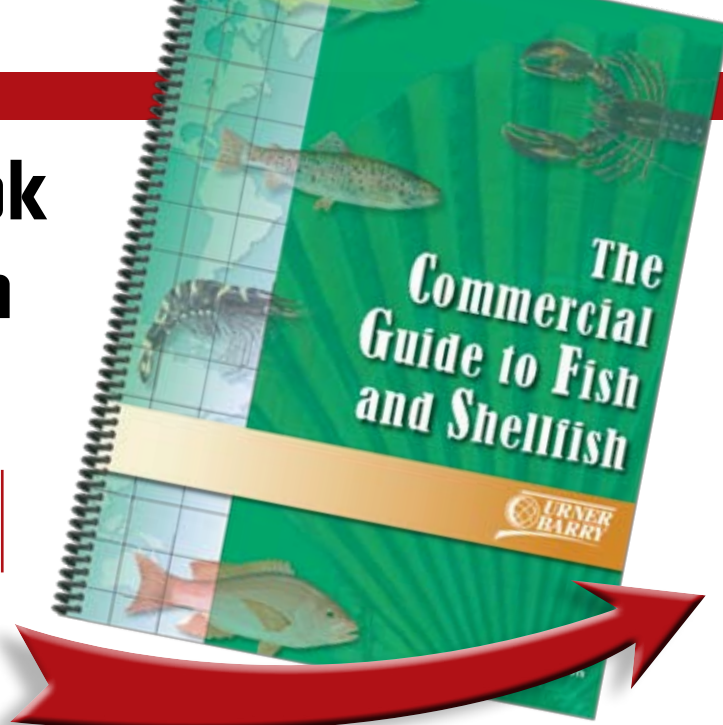
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From Urner Barry...

Seafood reference book gaining popularity with restaurant chains

The *Commercial Guide to Fish and Shellfish*, first published in March 2006, is enjoying overwhelming success and is scheduled for its third printing. This reference guide has become the "go to" resource for food companies both large and small. It is currently being used by a number of retail chains to train buyers. National foodservice distributors have armed their on-the-road sales force, and several national restaurant chains use the book to educate their store-level managers. For more information, contact your account manager at 732-240-5330 or visit us online at <http://shop.urnerbarry.com>. If you are planning on attending the International Boston Seafood Show, please be sure to visit Urner Barry at booth #364.

**See the next
2 pages for
a sample
spread from
the book!**



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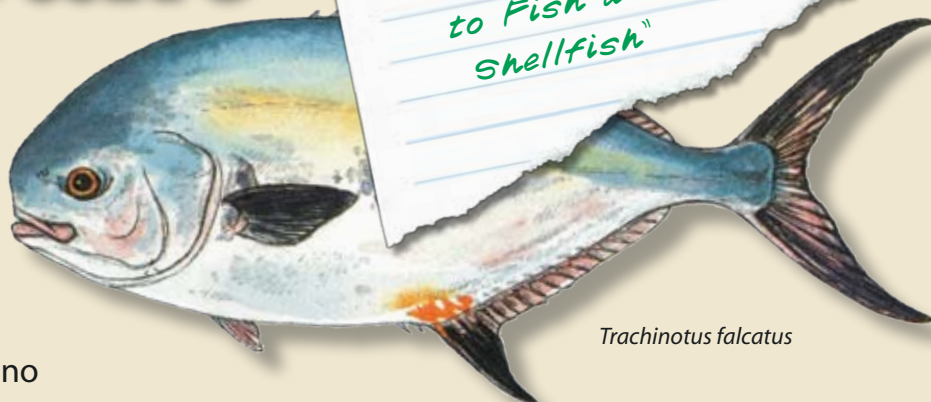
Three cans of Sigma Supreme Crabmeat are shown on a metal grate. The cans are labeled 'SIGMA SUPREME', 'Premium Gourmet Quality', 'PASTEURIZED', 'CRABMEAT', 'JUMBO LUMP/SUPREMO', and 'NET WT. 16 OZ. (454g)'. The cans are arranged in a triangular pattern, with one can in the foreground and two in the background.

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Pompano

This is a sample page spread from the Urner Barry book "The Commercial Guide to Fish and Shellfish"



Trachinotus falcatus

Specifications

Market name	Pompano
Scientific name	<i>Trachinotus</i> spp.
Common name	Snubnose Pompano, Florida Pompano, Permit Palometa, Paloma Pompano, Palometta Permit, Gafftopsail Pompano

Description

Trachinotus spp. The nomenclature for pompano is confusing. All of the following may legally be called pompano, but they sell for sometimes substantially different prices under the alternative names.

Pompano; *Trachinotus carolinus*. Also called Carolina pompano, Florida pompano and cobbler. Pompano range from Massachusetts—although rare north of Chesapeake Bay—to Brazil and throughout the Gulf of Mexico and West Indies. They move north and south based on water temperature. This is a fast, thin, silvery fish changing to golden on the belly with a deep body. The flesh is white and delicate. Pompano is a member of the very large jack family. It has oily flesh and grows to about two pounds and 18 inches long. In Florida, where much of it is caught, it is an important commercial and sport fish. Most of it is sold fresh.

Larger fish may be filleted. Smaller fish are usually offered in pan ready form. In price terms, however, it is definitely not just another pan fish. Most pompano run between one and two pounds. They are caught from the Carolinas, around Florida and into the Gulf. The main fishing season is October through May. Smaller fish are better eating than the larger ones. Although permit is a different fish, larger pompano are frequently called permit, which grow to much larger sizes.

Pompano are excellent broiled, but there is a substantial tradition of cooking them in pouches by baking them and using complex sauces. It is highly esteemed as a food fish. The delicacy and quality of the flesh,

Nutrition Facts

Serving Size: 3.5 oz

Amount Per Serving

Calories 164 Calories from Fat 85.4

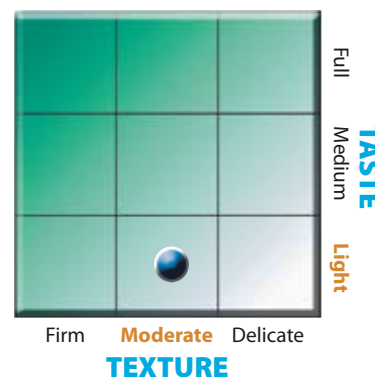
% Daily Value*

Water	71.12g	
Total Fat	9.47g	15%
Saturated Fat	3.5g	18%
Cholesterol	50mg	17%
Protein	18.48g	37%
Iron	0.60mg	3%
Sodium	65mg	3%
Omega-3	0.568g	

*Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs.

Eating Qualities

Pompano is considered a premium fish. The fat content is moderate, which contributes to the mild, succulent-tasting flesh. The finely textured meat ranges white to off-white and the taste is almost sweet. Pompano is typically prepared baked, broiled, grilled or pan-fried. Fresh fish should smell of the sea.



Fish Fact

While inspecting the beach a surveyor jotted down the name of the local fish he had for dinner on his chart, this is said to be the origin for the name of the city of Pompano Beach, FL.

Fishing Methods

- ☐ Aquaculture
- ☐ Dredge
- ☒ Gillnet
- ☐ Harpoon
- ☒ Hook
- ☒ Seine
- ☐ Trap
- ☐ Trawl

however, should be able to stand on its own with simple preparation and cooking.

There has, and continues to be, significant restrictions on both the commercial and recreational harvests of pompano in order to protect the resource.

Permit; *Trachinotus falcatus*. This fish is remarkably similar to the pompano and is also from the Atlantic. The only external difference is in the number of rays on the

dorsal fin. The permit's second dorsal fin has one spine and 17 to 21 soft rays; the pompano's second dorsal fin has one shorter spine and 22 to 27 soft rays. (Rays are the rib-like rods in the fin.) To the layman, the permit has a longer dorsal fin than the pompano. The chances of finding fish in commercial distribution with the fins sufficiently intact for positive identification are poor. Permit are found in the same areas and at the same time as pompano.

There are two major differences between the pompano and the permit. First, the permit grows much larger. Pompano seldom exceed five pounds. Permit may reach 50 pounds. Fish weighing 20 to 30 pounds are often taken by anglers and commercially caught fish around 10 pounds are also common. The second major difference is that pompano generally costs much more.

In terms of eating quality, permit is said to be drier and coarser than pompano. However, pompano also gets less desirable as it gets larger.

Since the visible difference between the two species is so slight, the probable commercial explanation is that smaller fish are offered as pompano and larger fish as permit. When buying these species look for smaller fish and try not to pay pompano prices for permit.

PRODUCT FORM

Fresh
whole, fillets,
butterflies

Frozen
whole, fillets,
butterflies

Palometa; *Trachinotus goodei*. This fish may be called pompano legally, as well as palometa. It is sometimes called longfin pompano. It is also very similar to the pompano and permit. It is slightly different in appearance, as it has four dark gray bars vertically on each side and the big dorsal fin is considerably longer than on the pompano or permit—sometimes so long that it extends behind the tail when flattened against the fish. The palometa's body is slightly more compressed laterally, so the fish is not so good for filleting as it provides a thinner fillet. In practice, dealers seem to call this fish a permit also.

Snubnose Pompano; *Trachinotus blochii*. Commonly imported as Golden Pompano, also called Golden Permit; this fish is farm-raised in sea cages in Asia with most U.S. imports coming from China.



Whole pompano.

PACK DESCRIPTION

IQF
1/30 lb, 1/40 lb,
1/45 lb, 1/50 lb

Fresh
1/50 lb, 1/100 lb



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Hormel and Cargill agree to label carbon monoxide treated meat

Cargill Inc. and Hormel Foods have joined the growing list of companies which have agreed to label all meat and fish products treated with carbon monoxide if deemed necessary. Their decisions came during a hearing last fall arranged by the House Energy and Commerce Subcommittee on Oversight and Investigations.

"Hormel will comply with any labeling

"...the practice was called 'highly deceiving' by some lawmakers who believe it misleads consumers into believing it is actually fresher than it is."

of this product that is determined to be necessary and fair through the legislative or regulatory process," said Jeffrey Ettinger, Chief Executive Officer of Hormel.

The practice of treating meats with carbon monoxide has been questioned because it was called "highly deceiving" by some lawmakers who believe it misleads consumers into believing it is actually fresher than it is.

In fact, Rep. Stupak, Chairman of the Subcommittee said at the hearing, "to put it bluntly, the sole purpose of carbon



monoxide packaging is to fool consumers into believing that the meat and fish they buy is fresh no matter how old it is and no matter how decayed it might be." He also cited that other countries—Canada, Singapore, Japan and the EU—have already banned the use of carbon monoxide in meat packaging.

Target Corporation sought permission from the USDA to mark CO-treated meats with a warning label in an effort to "encourage guests not to rely on color or the 'use or freeze by' date alone to judge the freshness of the product," the company said in a statement.

Hormel and Cargill executives both agreed to use similar language on their labeling.

Although the practice of treating meats with carbon monoxide was approved by the FDA in 2004 under the Generally Recognized as Safe categorization, investigations and studies have led to reservations regarding the safety of the product. Kroger discontinued the sale of CO-treated meat in February of 2006, and since then Tyson Foods, Safeway, Giant Food and Stop & Shop have followed suit by agreeing not to sell products treated with carbon monoxide. **U**

Adapted from a story which originally appeared on Foodmarket.com on November 19, 2007



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Sizes
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4 OZ (113.4g)
5 OZ (141.8g)
6 OZ (170.1g)
7 OZ (198.5g)
8 OZ (226.8g)
9 OZ (255.1g)
10-12 OZ (312g)
12-14 OZ (368.8g)
14-16 OZ (425.3g)
16-20 OZ (510.3g)
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Darden Restaurants

Continued from page 1

of corporate and restaurant support infrastructure.

Bill Herzig, Senior Vice President of Purchasing for Darden Restaurants stated he believes the transaction has put Darden even more firmly on the path to achieving their full potential. "LongHorn Steakhouse

and the Capital Grille's concentration in steak protein help us diversify Darden's portfolio which will be key in our ability to continue to drive long term growth that is both sustainable and profitable."

Bill Herzig will be on hand to address attendees of Urner Barry's Marketing and Executive Seminar this year in Las Vegas, Nevada, in April 2008. **LB**

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Crab meat

Continued from page 26

Many variations of the word haanai are recognized. Some of the most common spellings are haani, hanii, and hannii. The FDA does not have any listed name for this product which adds to the challenge of pinpointing the actual species. Since imports are required to be labeled, they will typically read "swimming crab" from China or *Portunus spp.*

Urner Barry's Reporter staff sampled crab meat from China and found the product to be large in size with a slightly drier consistency and texture than Indonesian product. It was clean and virtually shell-free. The product was firm and held up well in crab mixtures and crab cake recipes. Its appearance was white and bright. The overall quality and taste was very similar to that of Indonesian meat and sells at a price point that is significantly less.

Urner Barry has recently added Chinese crab meat price quotations to its *Seafood Price-Current* due to the many requests from importers who found the need to track pricing of this item. **LB**

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Michigan Turkey

Continued from page 1

Lennon explained that the original marketing plan for MTP, that of being a commodity meat supplier, was designed around the co-op's growers' understanding that they produced some of the best tom turkeys around.

Demographically, the surrounding area has a very stable labor supply and low turnover rate resulting in less training hours and a higher quality product. In fact, it is in large part due to Michigan Turkey's hand deboning lines that the operation has enjoyed the success it's had, even weathering difficult start-up years and poor markets of 2003.

According to Sales Manager Chad Van Kley, besides 100% hand deboning, another key point of differentiation, which is apparent in the company's yields and high-quality cooked products, is their proprietary bird stunning system. Instead of using a traditional electric stunning system, carbon dioxide is employed to render the birds unconscious before being hung on the slaughter line. Chad goes on to say that "this method minimizes blood spots and bruising on the bird's body. It's also much easier on the labor and reduces the number of employees needed to hang the birds."

In 2005 a decision was made to purchase a cooking facility to produce quality, value-added, cooked turkey products. Food safety was top priority during the plant layout process. Hung throughout headquarters are architectural diagrams of the plant, where a clear and distinct separation between raw and cooked is evidenced for

all to see. Employees have separate uniform color and individual electronic passes granting access only where permissioned. Stainless steel doors, floor drains and access ports are utilized to improve sanitation and cleanability. Overhead you'll find very limited pipes and fixtures to minimize airborne contamination.

Almost ten years in business and all the hard work and planning is paying off for the growers, investors and management at Michigan Turkey Producers. The development of their fully cooked and value-added line of turkey products was a natural transition for a company whose commodity product had already established a fine reputation in the industry. According to Dan Lennon "The Golden Legacy Line was developed to provide fully cooked and raw value-added products to the foodservice and retail marketplace. The quality of our growers' birds has been long established and now



Michigan's 100% hand deboning is a key point of differentiation for the company and ensures high quality product time after time.

the same excellent quality turkey meat is available in a wide variety of cooked high-end deli meats and raw seasoned roasts as well under the Golden Legacy Brand."

Whether raw or cooked, commodity or value-added, Michigan Turkeys is well on its way to establishing their own legacy in turkey industry lore. **US**

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