

Innovation and recognition key to Michael Foods' success



We have heard from Wall Street to Main Street that eggs prove one of the

greatest values during a recession as they are not only economical but a good source of protein. With over 100 years experience, Michael Foods, the world's largest egg processing company, has learned just how to keep up with the increasing needs of the egg sector, especially during these hard economic times.



"Michael Foods takes pride in offering innovative solutions... across a wide range of business channels..."

innovative and value-added products. The company has recognized the importance of functionality, performance and product development play throughout the foodservice/catering, commercial baking, retail and food processing industries. They pride themselves in providing a leadership role in the development of egg-based products to meet the needs of the modern operator and view success in terms of the success of the customers they serve.

One of the main areas of growth for the company has been in the retail sector. Michael Foods' recently released its third quarter results, where growth was driven by the "positive performances in food ingredient, egg products and retail low and

no cholesterol liquid eggs."

Through its recognizable and well-known brands such as Papetti's, M.G. Waldbaum, Crystal Farms and Inovatech Egg Products, Michael Foods has introduced numerous

Michael Foods takes pride in offering innovative solutions to customers across a wide range of business channels, and exports their products extensively all across the globe successfully navigating the

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Inexpensive, convenient, nutritious and tasty...

Popularity of prepared foods unprecedented

The popularity of prepared foods is growing at an unprecedented pace as consumers try to save time and money. The economic downturn, which has negatively affected many aspects of the food industry, has actually helped boost the trend as consumers trade down from dining out occasions to dinner at home. In response, grocers are expanding the selections of prepared foods to help satisfy the consumers' growing appetite for quickly prepared, palate pleasing meals.

Reasonably inexpensive as compared to many restaurants, faster than cooking

at home, and more nutritious than most fast-food, prepared foods made by supermarkets have taken their place on dinner tables. As grocers attempt to attract

consumers into their stores, local markets have installed stretches of deli cases and have hired chefs, many, if not most, with culinary degrees, to fill them.



Selling prepared food has become a strategic necessity for supermarkets. According to Tim Hammonds, CEO at the Food Marketing Institute, an industry trade group, his institute's most recent shopper survey showed 28 percent of

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Center of the plate



Michael Foods

The world's largest egg processing company has learned how to keep up with the increasing needs of the egg sector, especially during these hard economic times.

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Popularity of Prepared Foods

As consumers try to save time and money see how the popularity of prepared foods has grown to help satisfy the consumers' growing appetite for these quickly prepared, palate pleasing meals.



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Specialty and novelty dairy items hit the market strong

In the last decade, much of the growth experienced by the dairy market has been based on the introduction of products to both health-conscious and indulgence-motivated consumers. Manufacturers have been reacting by widening product assortments like ready-to-eat and value-added dairy products that specifically target dieters and consumers with fast-paced lifestyles.

On the milk front, the popularity of low-fat, no fat, lite and sugar-free products can be attributed to the rise in health awareness. Likewise, the fame of natural, organic and milk that is fortified with added ingredients is increasing due to the healthy image of drinking milk in marketing. At the same time, flavored and reusable single serving-sized container milks are growing in popularity as their convenience has proven to be appealing to consumers.

The ice cream sector, most popular among children and young adults, has seen an influx of specialized and novelty products. New flavor introductions, with promotions concentrating on niche areas, contribute to the increase in sales of ice cream for at-home consumption. New means of production and processing such as low temperature freezing and blending have also made strides and have been finding favor with consumers—light ice cream that tastes like premium for example. Low-fat and no sugar added options have also increased. Marketing ice cream as a year 'round product has removed the stigma of being a summer-time only item, though summer remains the peak season for sales.

Yogurt too is flourishing as a healthy treat because of its freshness and nutritional value. It is rich in protein, calcium, riboflavin, vitamin B6 and vitamin B12. Health-conscious consumers are increasingly drawn to organic and probiotic

yogurts. Probiotics are in the Lactobacillus and Bifidobacterium families and according to the Food and Agricultural Organization of the United Nations and the World Health Organization "live microorganisms, which when administered in adequate amounts, confer a beneficial health effect on the host." Probiotic yogurt has added nutrients and probiotic enzymes, and is proven to be the most popular because of its importance to digestive health.

The dairy industry is constantly looking for ways to keep its competitive edge and increase its productivity growth rates. For the moment, it continues to thrive



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thanks to the introduction of new and healthy options, such as convenience-sized servings and the opening of other niche areas, which have proven appealing to the purchasing power of the consumer. **UB**

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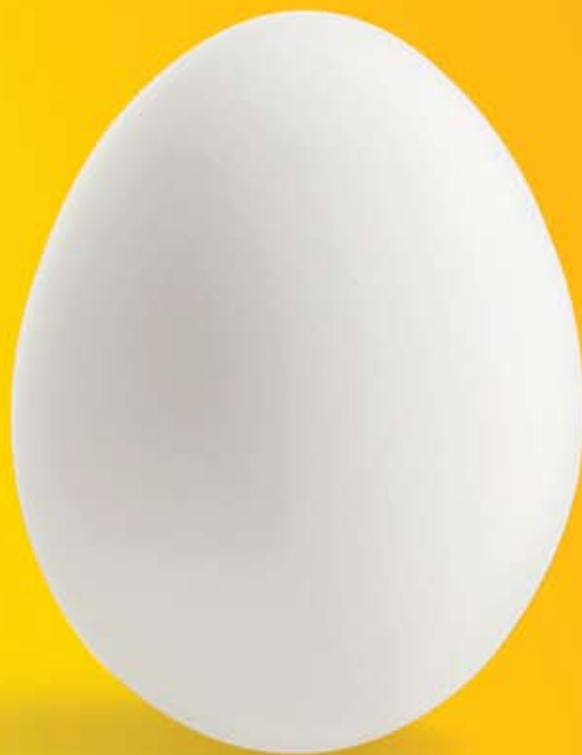
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N-60 Labeling: why it's important for beef further processors

Contributed by North American Meat Processors Association's Phil Kimball, CAE Executive Director; and Ann Wells Director of Scientific & Regulatory Affairs



NORTH AMERICAN MEAT PROCESSORS ASSOCIATION

Packers that conduct 100 percent N-60 testing on their boneless beef trimmings must be very vigilant in the harvest practices that affect contamination rates, such as sanitary dressing and application of multiple validated interventions. That is why the new proposed N-60 labeling program FSIS posted in mid-October is important to beef further processors.

FSIS says N-60 claims give companies receiving trim greater assurance than Certificates of Approval about prior controls for *E. coli* O157:H7.

NAMP has been a strong advocate of the N-60 label program and is pleased FSIS has launched it. N-60 labeling encourages stringent interventions earlier in processing, closer to the source of the problem.

While no testing program can guarantee a product is free of *E. coli* O157:H7, experts agree N-60 testing, when correctly applied, is the most robust testing scheme currently available to the industry for beef

trimmings. Most of the major packers in North America use N-60 testing and an N-60 labeling program would work well for Canada as well as the U.S.

Ideally, the CFIA and USDA should be willing to accept each other's N-60 labels. This would facilitate trade and raw material sourcing on both sides of the border.

"It is not the labeling or testing that will improve food safety, it is the more stringent practices and interventions required for any harvest operation under N-60 scrutiny that will protect the public and improve food safety," former NAMP

"It is not the labeling or testing that will improve food safety..."

Chair Brent Cator and President of Cardinal Meat Specialists, Ltd recently emphasized.

FSIS created the program in response to small and very small plants that told them it is often difficult to receive a Certificate of Analysis on product bought through a broker or distributor.

The use of labels bearing such claims is voluntary, however, and they must be approved by FSIS. Labels bearing this claim would not be approved on products sold at retail or direct to consumers.

Dr. Al Almanza, FSIS Administrator, told attendees at the recent NAMP Convention/Outlook Conference, which took place just a few days after FSIS posted the guidelines, that FSIS investigations show operations that correctly employ N-60 testing protocols are less likely to be involved in a recall or illness investigation. That being said, N-60 testing is not the silver bullet, nor should it be portrayed as such. **UB**



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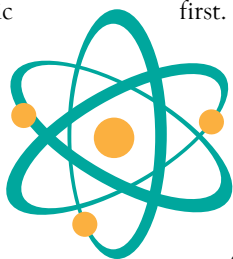
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Nano ingredients: beneficial or controversial?

A nano ingredient is a microscopic particle 1/1000th the width of a human hair, manufactured at the scale of an atom and molecule. Many times these tiny technological tokens are added to food as preservatives. The manipulation of matter on the scale of atoms is increasingly being used for nutritional supplements, flavor and color additives, as chemicals in agriculture and in food packaging. It is reported that nanotechnology is being used in more than 300 food products, packaging and food contact products for sale internationally, however, the actual number is not known.

The use of nano ingredients in food is controversial because government regulations do not require they be listed on labels. Currently in the United States, food ingredients are listed in descending order with the most prominent ingredient



first. Ingredients that consist of less than two percent are listed under the heading “contains less than 2% of the following.” Items referred to as “incidental additives” do not have to be listed as they are substances transferred via packaging, “ingredients of other ingredients,” present at “insignificant levels,” or have no “technical or functional effect.” Anything considered an “artificial flavor” also does not have to be listed.

The positive and negative effects of using nano ingredients in food are still being researched.

The Nobel Prize-winning Swiss physicist Heinrich Rohrer, a pioneer

“Nano materials are said to have the potential to revolutionize the way things are made.”

of nanotechnology, finds the lack of standard testing for food, packaging and agricultural products containing nano materials concerning because of the way the matter can dramatically change at that scale. Possible risks include organ damage and decreased immune system response. Nano ingredients can also produce free radicals which destroy DNA and can cause kidney and liver damage.



FoodProcessing.com lists some nano ingredients that may improve health. They state, “Nano ingredients will have a profound impact on raw material sourcing for food processing and will radically change how foods affect our physiology.” Synthetic lycopene as a food additive in juice, cheese and margarine is an antioxidant that converts to vitamin A in the body and is more easily absorbed. Similarly, natural free phytosterols are added to cooking oil to reduce cholesterol intake into the body by as much as 14 percent. FoodProcessing.com says nutrients remain stable under conditions of high temperature, pasteurization and agitation.

Market analysts predict a \$40 billion excess in the market for medically

beneficial, nutrient infused and functional foods. Recently, the establishment of a regulatory framework for nanotechnology including information on the size and shape of nano particles,

how they are incorporated into food by the food companies, and outlined procedures for companies to follow to have products approved for sale is being called for in Australia, but not yet in the U.S.



Nano ingredients are said to have the potential to revolutionize the way things are made. As food products technology regarding nano ingredients advances, it will be up to governmental bodies to evaluate, accept or reject the breakthroughs of science. **LB**

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Poultry exports breaking records, raising values

For those unfamiliar with the role of U.S. poultry exports, the United States is the largest exporter of poultry. Well-known U.S. brands reach all the continents in the world; although only a few markets account for the majority of the supply and resulting revenue. These markets are crucial to the U.S. but are also competition for state-side buyers and can push domestic prices higher at the wholesale and consumer level.

Russia, Mexico, and Canada are leading buyers of U.S. poultry products. Russia alone imported 1.6, 1.5 and 1.8 billion pounds of broilers and parts in 2005, 2006, and 2007 respectively. Adding other poultry exports such as turkey and chicken products, the total annual value of these exports to Russia amounted to 1.9, 1.3, and 2.3 billion U.S. dollars in 2005, 2006, and 2007. In fact Russia ranked as the number one destination market in 2005 and 2007 being displaced in 2006 by Mexico.

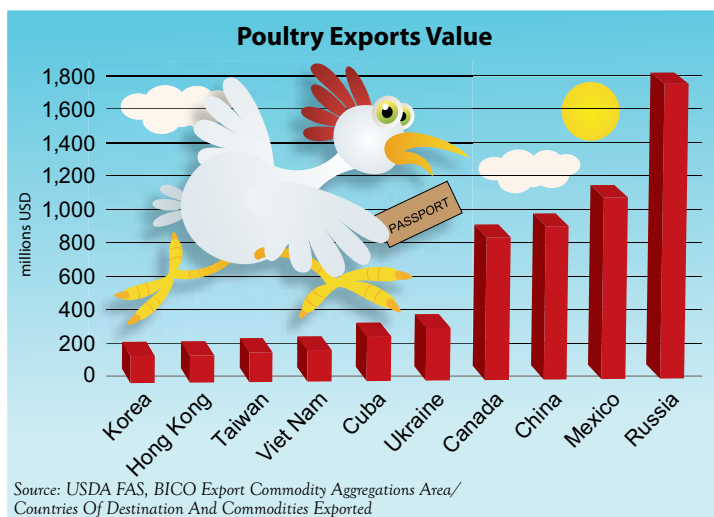
Mexico is a large consumer of commodity turkey and value-added turkey products. Turkey ham and other deli meat products have become very popular south of the border. Mexico has consistently ranked

number one on the U.S. list of export markets since 2005 for U.S. turkey products. In addition, Mexico robustly buys chicken products and broilers. With the exception of 2007, Mexico was the number one destination market of chicken products other than broilers. Total annual value of U.S. poultry exports sent to our "amigos" amounted to 1.3, 1.3, and 1.4 billion U.S. dollars in 2005, 2006, and 2007.

Canada ranks closely behind Mexico in position number three. Buying broilers, chicken pieces, and turkey products, the total value of poultry exported to Canada was 921 million, 967 million, and 1.2 billion U.S. dollars in 2005, 2006, and 2007 respectively.

Other very important markets are China and Hong Kong. China, for instance, ranks as the second most important market for broilers since 2006. Hong Kong displaced Canada as the second largest market for turkey products in 2006. Other markets for U.S. poultry include Bulgaria, Ukraine, United Arab Emirates, Turkey, and surprisingly enough, Cuba. **UB**

"These markets are crucial to the U.S. but are also competition for state-side buyers and can push domestic prices higher..."



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GOAL 2008: Global Outlook

The Global Aquaculture Alliance (GAA, www.gaalliance.org) held its annual Global Outlook for Aquaculture Leadership meeting (GOAL 2008) in Qingdao, China on October 29-31, 2008. Some 300 delegates attended at the meeting in Qingdao, and reports from attendees

and speakers were very clear: "GOAL '08, jointly sponsored by GAA and the All China Federation of Industry and Commerce—Aquatic Production Chamber of Commerce (APCC)—was one of the best meetings ever from the perspective of content presented, milestones met, bridges built, and initiatives launched."

cooperation between our two organizations in addressing the global marketplace." Stevens also noted that the opportunity exists for the Chinese industry to adopt GAA's Best Aquaculture Practices (BAP), not just for the export market but also to address food safety issues within China—as a benefit for Chinese consumers.

Emphasized during the three-day meeting were initiatives revolving around food safety of both exported products as well as those consumed within China - as China now produces over 60% of the world's aquaculture seafood—as well as standards and international trade cooperation. Several important side meetings were also held, including a high-level summit between Wally Stevens and George Chamberlain of GAA and Yu Taiwei, Director General of the Import and Export Food Safety Bureau of high-level representatives of the General

As GAA Executive Director Wally Stevens observed, this year's GOAL could be viewed as building bridges between industry groups and government. "We are delighted with our relationship with APCC, and see one of the benefits of our joint meeting to be greater



President of GAA, George Chamberlain, pictured here speaking ▲ at the three-day GOAL 2008 conference which was filled with presentations from well-respected industry participants.



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Administration of Quality Supervision Inspection and Quarantine of the People's Republic of China (AQSIQ). Stevens said the historic meeting resulted in the beginning of a cooperative relationship between GAA, APCC, and AQSIQ, and an opening of the door to working with GAA's BAP standards as a way to help both exports from China and local consumption.

"China now produces over 60% of the world's aquaculture seafood..."

Among the presenters, over the three day meetings were Dr.

James Anderson of University of Rhode Island, Ragnar Tvetas of University of Stavanger, Norway, and Howard Johnson of H.M. Johnson & Associates. Discussion included production estimates from the various producing countries and expectations on global demand and

continued discussion as to whether the aquaculture industry could handle a growing consumption of seafood.

One of the most important announcements that came out of the conference was Dr. George Chamberlain (President, GAA) discussing the application of BAP for an FDA Pilot Program which combines existing process inspections of the supply chain with enhanced product verification, with proposed product verification. A program such as this would provide comprehensive audits of each link in the supply chain. The shrimp industry would be chosen out of many other industries in the U.S. to take part in this program which would further BAP's coverage all over the world for aquacultured seafood.

Other important talks were presented by Mr. Roger Bing (Darden Restaurants) who

gave us an update of the U.S. foodservice industry, concluding that despite a difficult macroeconomic environment, there are opportunities in innovation and collaboration for increased productivity. Iain Shone (Lyons Seafood Inc.) discussed a UK buyer's perspective on the economic crisis. Shone emphasized that as cost will be at the top of all agendas the need to be proactive, to communicate and to provide buyers with options is essential to maintain product quality.

Finally, in closing remarks, Mr. Peter Redmond discussed the increasing role of the host country—China—in becoming a world seafood market force, and the goal of working together to ensure responsibility, sustainability and food safety. He also discussed the need for retailers to become more involved with the supply chain, and the important role of aquaculture as the wave of today and the future. **UB**

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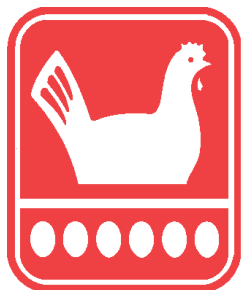


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Tyson Foods marks 50 years in poultry production



Tyson Team members celebrate 50 years of poultry processing at the Randall Road plant ▲ in Springdale, Arkansas. Randall Road was the first processing plant the company built.



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Tyson Foods recently celebrated the 50th anniversary of its beginnings in the poultry industry. Commemorated with a 250-person special luncheon for current and past Tyson Team Members, as well as invited community and state leaders. The event included remarks by Don Tyson, and a reading of a letter from Arkansas Governor Mike Beebe.

“Congratulations to everyone associated with Tyson for half a century of producing the finest food products with integrity and care,” Governor Beebe wrote. “Along the way, Tyson has become a leader in helping hunger-relief organizations feed those in need, and its many contributors have strengthened Arkansas’s economy.”

Although Tyson’s origins date back to 1935, it was not until August of 1958 that Don Tyson, former Tyson Chairman and CEO and current board member, opened the company’s Randall Road plant in Springdale, Arkansas with a \$75,000 investment from his father and founder of the then-Tyson Feed and Hatchery Inc, John Tyson.

“In the late 1950s, we were selling baby chicks and feed to farmers and realized

our company had to either expand or expire,” said Don Tyson at the plant’s 50th celebration. “I told my dad I wanted to build a chicken

processing plant and got \$75,000 from him. When I was running out of money, I went back for more, but he said ‘no.’ So I found some other investors to help finance the plant, which ended up costing \$90,000.”

“Congratulations to everyone associated with Tyson for half a century of producing the finest food products with integrity and care...”

With the opening of the plant, Tyson became the first fully-integrated broiler firm in northwest Arkansas. The one shift operation produced ice-packed, whole chickens, and initially processed 1,800 birds an hour with just over 100 people employed.

Former Tyson chairman and Chief Executive Officer Leland Tollett said that until the Randall Road plant opened, the company was shipping live chickens to processing plants in cities such as Kansas City and Chicago, and credited Don Tyson for seeing the future of the company was in processing. “He had a vision. He knew the industry was going to change. He decided not follow the industry but to lead it,” Tollett said.

Both the plant and the company have changed substantially since 1958. The Randall Road facility has been upgraded and expanded. Today it employs 460 people and processes 1.3 million birds per week, producing Cornish Game Hens for retail and foodservice customers. Meanwhile, Tyson Foods has grown in the processing and marketing of chicken, beef and pork and employs more than 104,000 people and generates annual sales of \$27 billion. **UB**



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HONDURAS: the “depths” of Central America

Honduras is said to be one of the most poverty stricken countries in Central America and the Western Hemisphere. Although the country's economic growth in the past few years has been good, their GDP per capita averages only \$3100 U.S. per year (2007 est), and the amount of unemployed individuals is rather high.

The first people known to inhabit Honduras were the Mayans. In 1502, Christopher Columbus caught the first glimpse of Honduran land when he landed there and named it for the deep water off its coast. “Honduras” literally means depths.

Bordering the Caribbean Sea, Honduras is located between Guatemala and Nicaragua. It was once known as one of the banana republics, a small dependent country of the tropics whose foreign investor would try to direct the country's internal affairs.



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▲ Honduras' land is beneficial for the growth of coffee and bananas. Ripe coffee berries, pictured here, grow throughout the region.

The U.S. is Honduras' chief trading partner, with trade estimated at over \$7 billion in 2006. The trade between U.S and Honduras is dominated by the maquila industry, which imports yarn and textiles, and exports finished articles of clothing. Hondurans, however, also export coffee, bananas, seafood (particularly shrimp), minerals, fruits, and vegetables to the U.S.

“The U.S. is Honduras' chief trading partner, with trade estimated at over \$7 billion in 2006.”

By far, the largest export item of Honduras is bananas, with much of the production taking place on the northern coast.

Chiquita Brands International and Dole Food Products, both U.S.-based companies have monopolies controlling the export trade of bananas from Honduras. The 1998 hit of Hurricane Mitch took a toll on banana production as 70% of crops were destroyed and plantations were left devastated. By 1999, 60% of the working population was employed again with the banana companies.

Coffee is another large export item from Honduras and is produced in 14 different providences by thousands of independent producers. It too, was hit hard after Hurricane Mitch in October of 1998. Prior to that, Honduras was the tenth biggest producer and exporter of coffee. Hurricane Mitch was responsible for an 11% fall of coffee production in 1999.¹⁸

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Honduras / U.S. comparison



AREA	112,090 sq km	9,631,418 sq km
COASTLINE	820 km	19,924 km
POPULATION	7,639,327	295,734,134
LIFE EXPECTANCY	69.37 years	77.71 years
GDP	\$30.65 billion	\$11.75 trillion
GDP (per capita)	\$4,100	\$40,100
AGRICULTURE AS A %GDP	27.8%	0.9%
AGRICULTURAL PRODUCTS	bananas, coffee, beef, shrimp, tilapia, lobster	fruit, wheat, corn, grains, poultry, beef, vegetables
LABOR FORCE	2.78 million	147.4 million
UNEMPLOYMENT RATE	27.8%	5.5%
POPULATION LIVING BELOW POVERTY LINE	50.7%	12%
OIL CONSUMPTION	43,000 (bbl/day)	19.65 (million bbl/day)

Sanders' secret to stay safe and secure

Early in September, under much fanfare, KFC temporarily relocated Colonel Harland Sanders' handwritten Original Recipe® to a secure location as the company redesigns the secure local of one of America's top corporate trade secrets. This is the first time in decades the 68-year old document has been moved, and only the second time in its entire history.

Louisville-based KFC spared no expense to protect the recipe, as it hired off-duty police officers and private security guards to assist the document's relocation by armored car. In fact, the yellowing hand-scripted paper was slid into a briefcase that was then handcuffed to a security expert for the transport.

"There's no way anybody could get this

"In order to formulate the secret recipe, several suppliers are involved in the process, and none know the entire formula."



recipe," said Bo Dietl NYPD detective who had the privilege of being handcuffed to the briefcase. Dietl's security firm is also handling the security improvements for the recipe at headquarters.

Just how secretive is it? Only two KFC executives know the "finger lickin'" recipe of 11 herbs and spices. A third executive knows the combination to the safe where the recipe usually stays, and less than a handful of KFC employees know the

identities of those three executives.

In order to formulate the secret recipe, several suppliers are involved in the process, and no one supplier knows the entire formula. Additionally, KFC does not identify the suppliers involved in the production and blending of the recipe.

Colonel Harland Sanders created the Original Recipe in 1940. The entire formula is scripted in pencil on a piece of notebook paper and includes exact amounts of each ingredient. For more than 20 years it has been locked inside a filing cabinet in a vault equipped with three locks. Vials of the secret herbs and spices are also said to be inside the cabinet. Although many have attempted to duplicate the concoction, none have come close. However, one executive leaked information saying that the actual recipe does include a few surprises. **LB**



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Jamie Doherty

Ad dollars during a recession = Success

In today's economy, times are hard for just about everyone. It is no secret that the common goal among businesses, both big and small, is to keep doors open. In

a period when every dollar counts and budget cuts are being made left and right, a very popular expenditure often trimmed or scaled down is a company's advertising

and marketing budget. Believe it or not, eliminating dollars in advertising or marketing is one of the worst mistakes any company can possibly make if it is aiming to succeed during an economic crisis. Unfortunately, most companies believe they are saving money by canceling

their marketing

if not increase them, whenever possible, even in times of crisis.

In a similar study by McGraw-Hill Research, results showed that businesses which either maintained or increased their budget and expenditures during a recession averaged significantly higher sales growth during a recession as well as three years afterward. These companies who were aggressive with their campaigns saw sales rise 256% over those who did not advertise or had significantly scaled down their advertising.

Advertising and marketing campaigns should be viewed as an on-going business investment, recession or not. You have to be in it for the long haul. There will always be consumers, but during volatile times they will be more cautious of where they are spending their money. If you must cut back, try changing your campaign around by creating informative messages that convince consumers why they should do business with you, and how you relate to their own personal economic needs and situations. For example, some of the most well-known campaigns were developed during rough economic periods. Intel pushed the slogan "Intel Inside" during the 1990-1991 economic crisis. This slogan is still alive and well to this day. Back in 2000-2001, retail giant Wal-Mart promoted itself with their "Every Day Low Prices" campaign. They knew consumers were watching where they spent every penny, and turned their advertising strategy around to help people feel as if they were getting more bang for their buck.

The old saying "you need to spend money to make money" definitely rings true when it comes to advertising. In this time of economic adversity, it's time to build your brand better than ever! **UB**

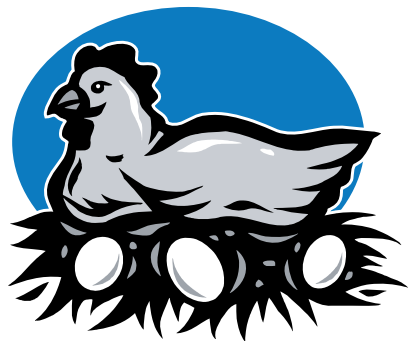


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campaigns when in fact, they are actually hurting themselves in the long run.

The most important thing businesses need to keep in mind is that recessions always end. When the hard times are over, where will your customers be? If your brand disappears, competitors would love to swoop in and take advantage of the marketing lull. Not only will they achieve instant economic gains, but they are also setting themselves up for continued success once the economy gets back on track. Those who tighten or cut their advertising budgets are not only left to rebuild their brand, but they are faced with the daunting task of reeling their customers back in.

A 2003 study by Kristina Frankenberger and Roger Graham found that advertising creates a solid advantage to financial success for up to three years into the future. Those ad dollars spent during a recession further indicate that the benefits received during tough economic times are greater than those reaped from advertising during non-recessionary periods. In their study, Frankenberger and Graham concluded that companies and businesses should keep their advertising budget as is,



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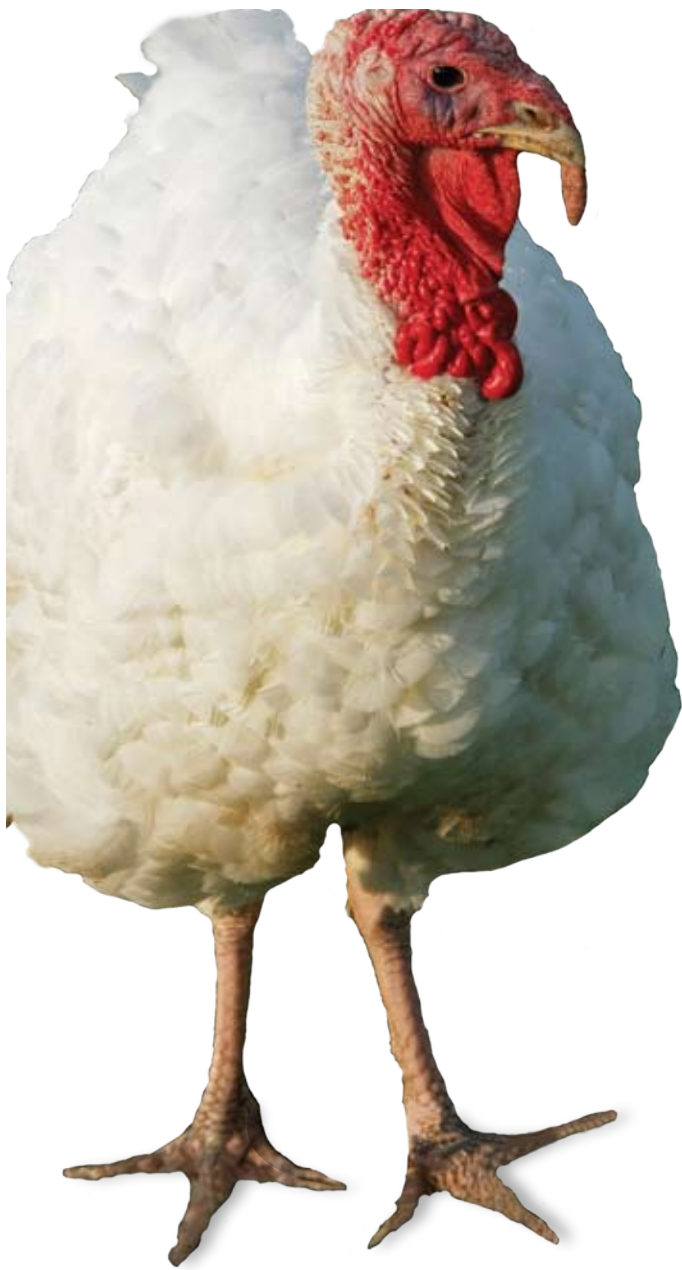
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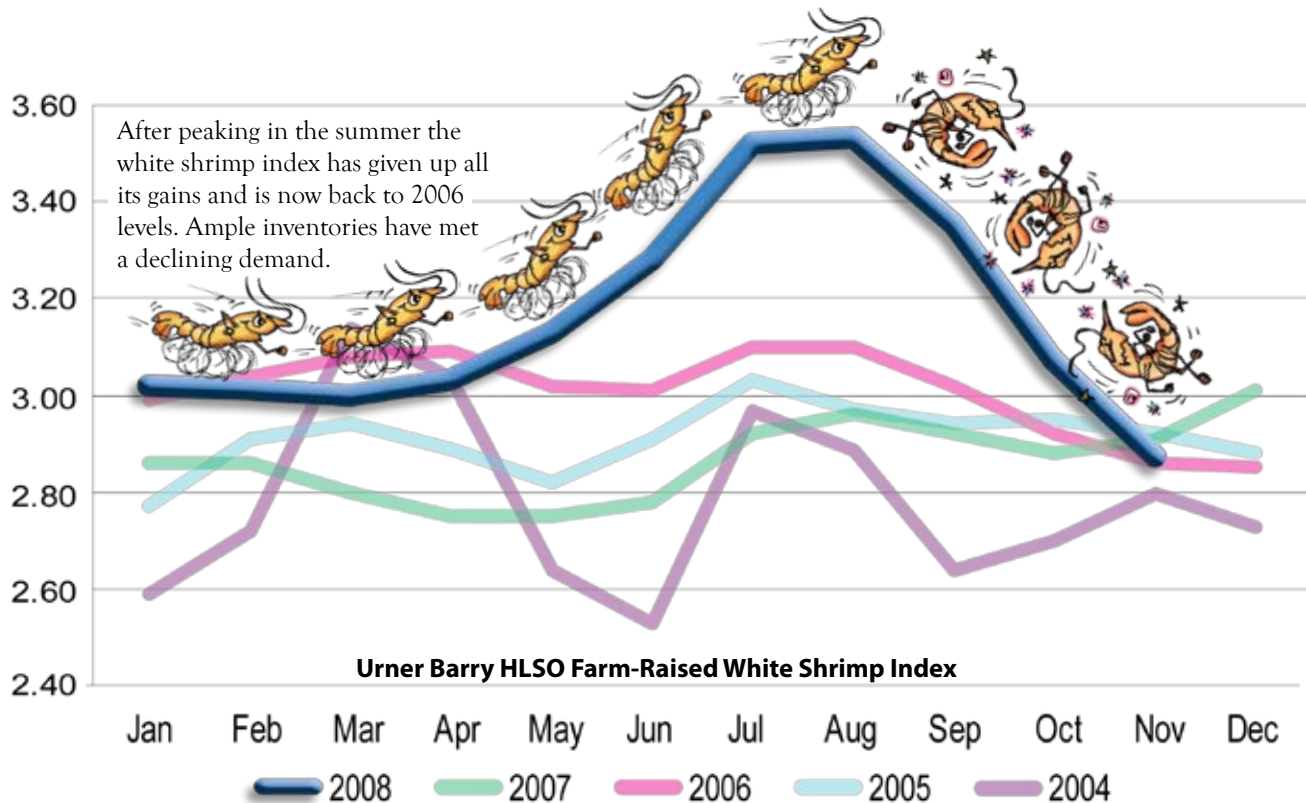
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The perspective of a corporate executive chef

Being an executive chef for a major corporation sounds like a fairly easy and cushy job, right? Well, that's not necessarily the case. I recently had the opportunity to have a sit-down session with "Doug" (who preferred that his last name not be published), who is the executive chef of a *Fortune* 500 metals and minerals company situated in the New York Metropolitan Area.

"A chef has to strike a balance among taste, nutrition, and the customer experience," he asserts. "It is vitally important to know who your customers are. On any given day, your customers are the very tier of upper management within the corporation... the CEO, COO, CFO, the President, select Vice-Presidents, and probably the Treasurer and Secretary. These are busy people who adhere to the old adage that time is money. They consider dining as a welcome respite from their busy days, an opportunity to not only take nourishment, but also to recharge their internal batteries and to exchange thoughts, ideas, and occurrences with their fellow executives."

Not only does Doug have to prepare what is hopefully a sumptuous repast each day, he must also plan the menu and order from his suppliers accordingly. "I dislike both surprises and either mediocre or inferior quality," he said. "I insist on dealing with suppliers who have very high standards of both product offering and quality control. In fact, I personally visit their premises on, minimally, an annual basis. Additionally, I ensure that I have sampled whatever they are providing me with so I can be absolutely certain that my customers will have an enjoyable dining experience."


Doug tries to have a selection of three entrees available each day: a fish dish, a red meat (beef, lamb, pork) offering, and a chicken variant. Two starches are offered (albeit in different variations daily), and a choice of vegetables is always available. At times, an offering of ethnic cuisine (Italian, Chinese etc.) may replace one

of the original three staples. Weekly menus are prepared and circulated. The executives (or their administrative assistants) make their selections electronically,

and forward them to Doug or his staff, along with the time (from 11:30 until 1:30) that the person will arrive in the dining area. Fresh condiments (celery stalks, carrot sticks) are always available, as is an assortment of fruits (apples, oranges, grapes). A single dessert is offered daily, as well as a salad. Beverages include bottled water, sodas, coffee, tea and milk.

"At times, however, I can be thrown a curveball," states Doug. "If someone within the sales side of the organization has been working hard on a prospective client, and a little executive "schmoozing" is in order in an effort to provide some peer-to-peer management positioning, an executive may request that the client be entertained in the dining room. The potential client, naturally, is queried about his culinary preferences, and every effort is made to ensure that his dining experience exceeds expectations."

I take great pride in introducing myself and my staff, and putting us all at the beck-and-call of the visitor while he/she is on our premises. Also, I always ask the salesperson to keep me apprised of their efforts. There is no greater pleasure for an Executive Chef than to have played a role, no matter how small, in the obtaining of a new client and revenue stream for the organization."

Satisfying the needs of his "clients," be they internal or external, is a daily challenge for Doug, but one that he relishes. "In some small way," he states, "I earnestly believe that the efforts of me and my staff contribute to the success of the corporation as a whole, and I take great pride in that." 

"I insist on dealing with suppliers who have very high standards of both product offering and quality control."



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Butterball University hones turkey cooking professionals



Expert advice on how to cook a perfect turkey for the holidays is available every year from professionals at Butterball's Turkey Talk-Line®. Becoming an expert in cooking the perfect turkey is no easy task. Every one of the more than 50 college-

and when to start roasting the turkey so it is ready by half-time," says Butterball's Talk-Line Web site.

Mary Cligman is a college graduate with a degree in home economics that has been "talking turkey" for Butterball for more than 24 years. She says helping families prepare their meal in a safe and reliable way is an awesome feeling. "I love the opportunity to help so many people. At the end of the day, I know that I've made a difference and helped people celebrate the holiday."

Training to become a Butterball University Expert begins in October with a kick-off day filled with media, microbiologists, food safety experts and of course, turkey!

The course culminates with a turkey lineup which is the result of a home-cooked turkey prepared by each and every trainee. The idea here is to have every "student" relay a different method of cooking with the class so that familiarity with as many different cooking scenarios can be attained.

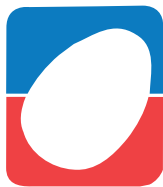
This year Butterball has even upgraded the Turkey Talk Line to provide expert holiday advice online, "on demand" and on the go. Weekly Web chats are available on the Web site and helpful turkey text messages are a part of their latest "Turkey Texts" for your mobile phone. No question is too tough for Butterball's turkey talkers, and they are ready and excited to tackle any challenge you throw at them. **UB**

"... Butterball Turkey Talk-Line experts have solved some puzzling turkey situations, like...what to do when the turkey is on fire..."

economists and nutritionists goes through a rigorous training experience before they answer one phone call.

Butterball began its Turkey Talk-Line service 27 years ago with six home economists responding to 11,000 calls in the first year alone. This year, 55 specialists, all with at least a Bachelor's degree in some type of food-related field, completed Butterball University's training course and are now set to tackle the season's influx of phone calls. Cries for help from around the nation on how to prepare, cook or salvage the holiday bird are expected with anywhere from 100,000 phone calls predicted to occur during the season, and 12,000 during Thanksgiving week alone.

"Over the years, the Butterball Turkey Talk-Line experts have solved some puzzling turkey situations, like which pan to use, what to do when the turkey is on fire,



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2008-9 Alaska crab quotas reveal no major surprises

The Alaska Dept. of Fish and Game announced the 2008-09 crab total allowable catch (TAC) for red king crab, snow crab, and bairdi crab at the end of September.

The season opened on October 15th with several areas closed to protect the Pribilof blue king crab stock. The St. Matthews Blue King crab fishery remained closed as well because the projected harvest level of 2.42 million pounds is still below the minimum threshold for opening the fishery. It is important to note that the biomass of this fishery did increase this survey period.

"Overall, these quotas are in line with expectations coming out of discussions on crab stocks earlier in September."

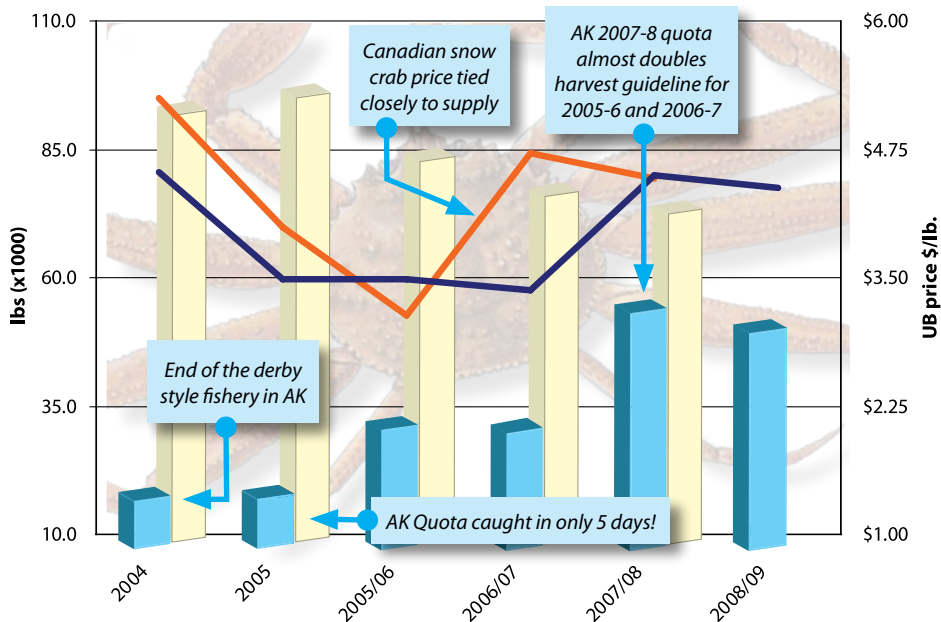
That being said, this year's quota is virtually unchanged for Bristol Bay red king crab with total amount being 20.364 million pounds, vs. 20.383 million pounds in 2007. The snow crab quota has been reduced 7.1% to 58.55 million pounds. Bairdi crab suffered a larger reduction, with the new total allowable catch equaling 4.3 million pounds or 23% lower than year ago levels. ADF&G says this reduction was partly to comply with new overfishing definitions. Overall, these quotas are in line with expectations coming out of discussions on crab stocks earlier in September.

All these figures include the 10% CDQ allocation. The IFQ allocation for crab quota share for harvesters is equal to 90% of the total allocation. **UB**

Adapted from a Seafoodnews.com article by John Sackton which originally appeared on Sept. 29, 2008

SEAFOOD
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AK and Canadian Snow Crab quotas and prices



AK quota for opilio is down slightly for this year. With the current economic climate, as well as the currency exchange between the strong USD and the Canadian loonie, there is downward pressure on both AK opilio and Canadian Snow Crab.

Canadian Snow Crab Quota
AK Snow Crab Quota
AK Snow Crab 5 oz. prices
Canadian Snow Crab 5-8 oz. prices



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Restaurants turning to two-wheel delivery

The restaurant industry has taken a cue from the increasing number of commuters opting to climb on a bike instead of into their cars in order to save on the cost of fuel. Urban areas, specifically, where

traffic and lack of parking can prolong the amount of time it takes to deliver hot meals to customers, are experiencing a large increase in bike delivery. Many franchises in the Washington, DC and Boston areas have put their deliveries on two wheels instead of four.

Besides obvious benefits like lower gas emissions and better health, restaurants that have implemented bicycle deliveries have more timely distribution and don't suffer parking ticket costs. Salary expenses go down too because gas cost is no longer built into the employee's wage.

Daniel Corno owner of Pita Pit in DC watched his liability insurance plummet without the use of motorized vehicles. He also saw a decrease in turnover. "A lot of drivers think the money looks good until they get their gas bill, do the math, and decide they're not making enough," said Corno. His riders also act as a great

advertisement for his business and put forth a climate-friendly image. Teaming up with another bicycle-based delivery service, DCSnacks, Pita Pit has boosted sales by \$2000 a week.

The new generation of bike delivery is even engineered for large loads. Some are even equipped with flatbeds and cargo lockers. Trikes that can carry up to 800 pounds are used at New Amsterdam Project (NAP), a "human powered delivery service" in Boston. Wezday Jane, the general manager says "Many of our clients use people-powered delivery as a marketing tool that helps set them apart. It reinforces that these are local companies and locally made products."

"Many of our clients use people-powered delivery as a marketing tool that helps set them apart."



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The Massachusetts-based Petsi Pies trusts NAP for all of its deliveries for Thanksgiving. Owner Renee McLeod says, "I wanted to be here making pies. I love that I don't have to smell gas in the morning, it just feels like I'm doing the right thing."

Other larger franchises are trying new and more energy efficient means of delivering their meals too. In Las Vegas, Domino's Pizza is testing Zap! Xebra's electric vehicles. Sopraffina Café in Chicago is also using electric car company Zap to launch a 100 percent solar-electric catering truck. El Pollo Loco, the fast casual restaurant chain founded in Guasave, Mexico is using a three-wheel, sub compact electric Xebra™ car covered in bumper to bumper brand messaging to deliver its chicken.

Bicycle delivery may be the answer for those businesses looking to save significantly on expenditures, with some even learning to incorporate company branding to benefit their business. Certainly, it is a sign of the times as individuals, as well as companies, nationwide shift to a greener environment and a more cost-effective business plan. **UB**

Red meat retail values at an all-time high...

Beef price spreads and retail value

The orange line indicates the retail value of beef and it is represented on the right vertical axis. The line shows that retail values as of September of '08 are at an all-time high. The blue and green lines show the spread between gross farm value and wholesale value, and are represented on the left vertical axis; here we can see when margins are squeezed and then passed along the distribution chain. **US**



Source: Economic Research Service, USDA

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Quick-service spreading its wings

With higher energy costs, commodity prices and financial problems on Wall Street, numerous surveys and studies within the foodservice sector show that consumers are likely to cut back one way or another, either by eating out less often or ordering less. Yet for some quick-service chain restaurants, such as Wingstop, the future may not be entirely so gloomy.

Wingstop is a chicken wing chain with more than 650 units, either open or under development, which has sold over one billion wings. In 2007, its system wide sales totaled \$200

million, and its plans for further expansion in the Northeast are continuing.

"Despite troubles in the economy, this has already been a banner year for Wingstop," said Bruce Evans, vice president of franchise development for Wingstop. "Our network of franchises coupled with our simple, efficient concept and quality product are growing the brand across the country. And we're excited to begin expansion in the in the Northeast."



The Dallas-based company said in a press release that it plans to launch an aggressive expansion campaign, opening as many as 75 restaurants in the Northeast area over the next five years. A series of open house events will be hosted in the New Jersey, Pennsylvania, Massachusetts, Ohio, Connecticut and New York area as a way for potential franchisees to meet existing

members of the Wingstop management team and hear more about the company's expansion plans.

Wingstop says its plans for growth are off to a strong start as most recently the company signed a franchise agreement with NFL defensive tackle of the Indianapolis Colts Raheem Brock to develop three restaurants in the Philadelphia area. A franchise agreement has also been signed with former NFL lineman Ron Stone to develop two Wingstop restaurants in Boston.

"Boston has great potential for Wingstop franchisees, and sports fans and wings go great together," said Evans. "Based on Massachusetts' active population and the success of Wingstop restaurants currently open throughout the country, we see a lot of room for growth here." **UB**



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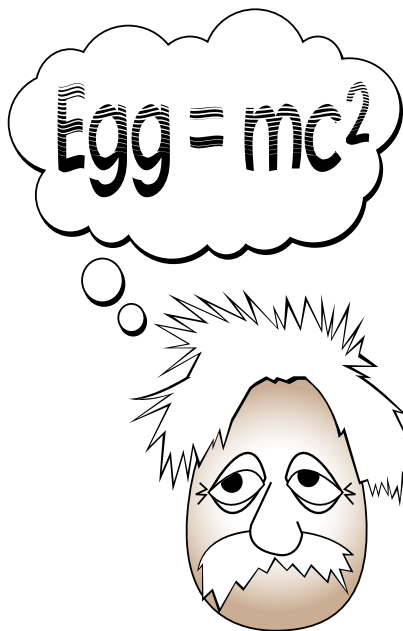
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Test your **egg** knowledge

1. What day(s) of the year can you stand an egg on its end, assuming you have a skilled hand and sufficient patience?
 - a. During the autumnal equinox
 - b. During the vernal equinox
 - c. During both equinoxes
 - d. Any other day of the year
 - e. All of the above
 - f. None of the above
2. True or False: The biggest time of the year for the sale of eggs is Easter.
3. Which of the following factors is a determinant of what color egg a hen will lay?
 - a. The diet of the hen
 - b. The breed of the hen
 - c. Whether the hen is located in New England
 - d. Whether the hen is cage-free or not
 - e. Whether the hen is a Red Sox fan
4. Approximately how many eggs per day will a hen produce?
 - a. Four
 - b. Two
 - c. Depends on a variety of factors
 - d. One
5. A "cage-free" egg refers to the fact that
 - a. Eggs are laid by hens at indoor floor operations, sometimes called free-roaming hens
 - b. The egg has never been in a cage
 - c. The cage involved did not cost the owner any money
 - d. The eggshell was cracked, and the contents flowed freely through the cage



6. True or False: The size of an egg produced by a hen has little to do with how big the bird is.

7. True or False: The production of eggs has not materially changed during the past 50 years.
8. True or False: Eggs were one of the principal ingredients in a famous Donald Duck story.
9. The U.S. produces some 75 billion eggs per year which represents what percentage of the total world's production?
 - a. 25%
 - b. 10%
 - c. 15%
 - d. 5%
 - e. None of the above
10. True or False: Eggs are produced by the same chickens that you eat.

See answers on page 61

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60 seconds with...

Joel Brandenberger

After a 15-year career with the National Turkey Federation, Joel Brandenberger was appointed as its President in December of 2006. Since that time he has implemented the Federation's strategic plans as well as promote the interests of all NTF members in the areas of marketing, legislative affairs and regulatory issues. *Urner Barry's Reporter* caught up with Brandenberger for a quick question and answer session on some important issues facing the industry.

URNER BARRY'S REPORTER: What will be the most pressing issue facing the turkey industry in 2009?

JOEL BRANDENBERGER: Restoring profitability. Obviously, the brunt of this burden lies with individual turkey companies, as they analyze their production and marketing programs and make changes where appropriate. But, NTF has a key role to play as well: we must get the federal government to revisit a renewable fuels policy that has more than doubled the cost of the industry's largest feed ingredient; we must be sure that any renewed debates on food safety, the environment and labor stay focused on policies that actually enhance food safety, the environment and workplace safety, as opposed to policies that satisfy special interest groups; and we can help provide an umbrella marketing program that compliments an individual company's efforts.

UBR: You have become a vocal spokesman, for not only the turkey business but the entire food industry concerning the ethanol mandates and the food for fuel debate. Will a Barack Obama administration be more "food industry friendly" in this regard?



NTF President Joel Brandenberger. ▲

JB: It appears President-elect Obama's views on corn-based ethanol are similar to the current administration's, but the new Congress really will be the focal point of efforts to revisit our nation's renewable fuels policy. The three pillars of the current ethanol policy—the Renewable Fuels Standard, the "blender's" tax credit and the ethanol import tariff—are all in statutory law, and it will require an act of Congress to change any of them. We have seen a growing realization among Americans that the ethanol policy has contributed significantly to food inflation while doing little or nothing to reduce our dependence on foreign oil or to improve our environment. We believe the grassroots pressure will continue to mount for Congress to make changes to the existing policy.

UBR: Turkey breast meat values were well below cost of production for most of 2008. The economy is contributing to changing consumer consumption patterns that are increasingly favoring less expensive grinds such as ground turkey, sausage patties and chubs. How can retail and foodservice outlets help counter this trend and advance the movement of white meat products?

JB: Solutions will vary between companies,



and some things—like the sharp downturn in the overall economy—are beyond any turkey company's control. Each company will look at its current production level, its customer base and its product mix and determine what changes, if any, will help its individual bottom line. As this happens, the market will begin to adjust and breast meat values will strengthen. Hopefully, the national economic picture will also improve, which will hasten the turkey market's recovery. Based on public comments and reports, it is clear the industry is responding as swiftly to the current situation as it has to any economic challenge in the last 20 years. NTF can play a role in helping provide macroeconomic information to its members, but the tough choices will be individual ones.

UBR: What's next for the National Turkey Federation?

JB: Broadly speaking, our challenge in the near term is the same as our members: we have to continue to deliver a high-quality product during challenging times. More specifically, we believe the legislative and regulatory challenges that will come with a new administration and new Congress will require us to begin lobbying Congressional committees and agencies that heretofore have had a marginal impact on the turkey industry. We also believe that the decision to cease paid advertising in our marketing programs creates an opportunity to bring some communications functions in-house and to enhance our reputation for utilizing new communications outlets like Facebook or our Web site, www.eatturkey.com, to enhance consumer awareness of turkey products. Finally, the current economic situation will compel us to make sure we use cutting-edge technologies and focused meetings and conventions to deliver critical information to our membership. We think we're well-positioned to succeed on all these fronts. **UB**

RPI trends with beef consumption...

Restaurant performance continues to slide

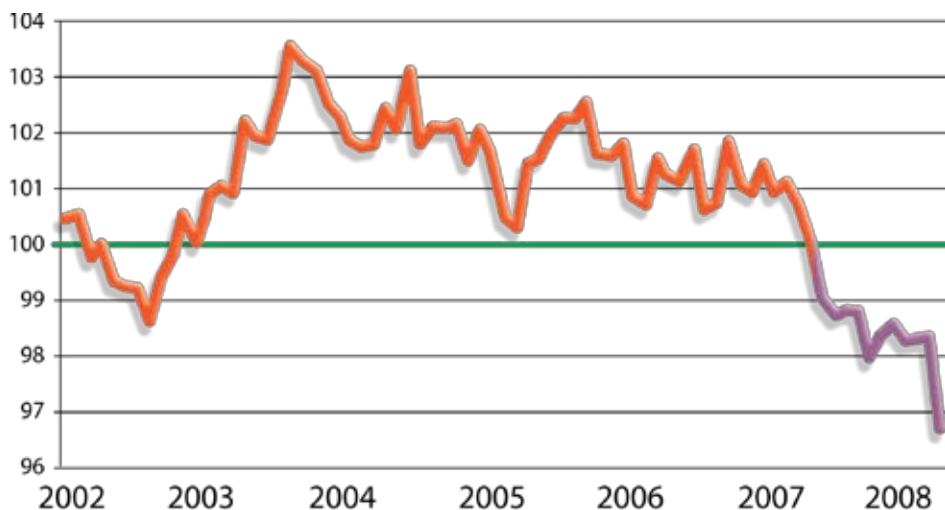
Of all the protein commodities, the per capita consumption of beef appears to reflect the trend of the restaurant performance index (RPI) most closely. Annual per capita consumption figures for beef show a direct correlation to it. The restaurant index in 2003, for instance, experienced a steep contraction which coincides with a decline in beef consumption for the same time period—consumption went from 67.6 pounds in 2002 to 64.9 pounds per capita in 2003. Likewise again, in 2005 and in 2008, the beef sector experienced a decrease in per capita consumption. If history repeats itself

and beef consumption per capita continues to follow the trend, 2008 figures could drop significantly. **LB**



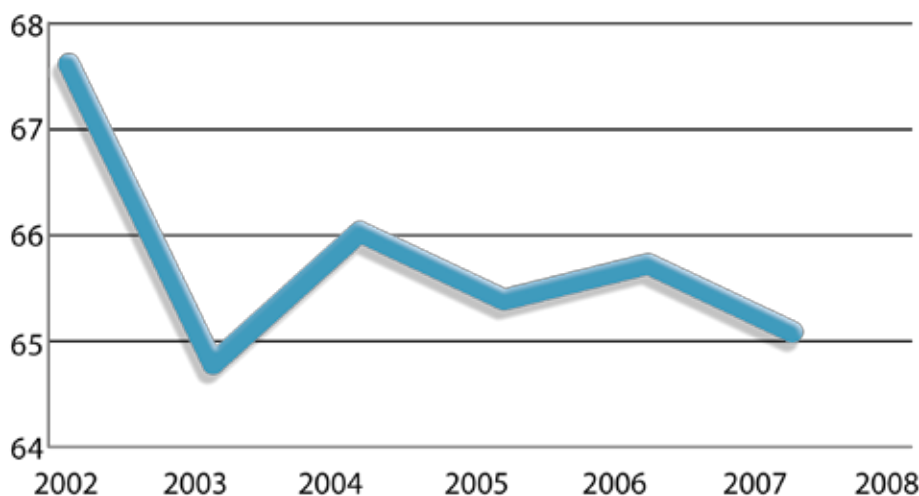
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Restaurant Performance Index



Source: NRA; Values greater than 100 = expansion; Values less than 100 = contraction

Annual Beef Consumption Per Capita (lbs.)



Source: ERS (Economic Research Service), USDA



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Natural preservative may increase shelf life...

Seaweed as a replacement for salt in processed foods



"...the project may revolutionize the food industry and improve public health."

Research shows that seaweed granules may be able to replace sodium chloride—salt—in processed foods. Specifically, seaweed granules manufactured from cold-water brown seaweed off the Norwegian coast have been shown to maintain taste and shelf life and reduce the number of micro-organisms in food the same way salt does.

According to Sheffield Hallam University's Dr. Andrew Fairclough, in association with Seagreens, a company specializing in wholefoods based mainly on wild seaweeds,

◀
Low tide in Fjord on Moskenesoya, Norway displays an abundance of the Arctic wrack seaweeds.



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seaweed can be used as a natural, health-boosting alternative that doesn't affect the taste or the shelf life of the food in an adverse way.

"In addition to this, Sheffield Hallam University tested the granules for their 'purity' in terms of their microbial load and for any external pollutants, and found that the product is extremely 'clean,'" said lead researcher Dr. Andrew Fairclough.

Although a vital nutrient for the body, salt consumption, as a standard should not exceed six grams per day for the average adult. According to Alpha Galileo's independent research, individuals typically consume 50% more than the recommended amount of the daily intake for salt. This excessive intake has been shown to lead to high blood pressure, stroke or heart attack, among other health conditions.

In the United States, Ireland and the United Kingdom, over 80% of salt intake comes from processed foods, 20% can be attributed to meat and meat products and 35% to cereal products. Salt activates proteins to increase water-binding in processed meats developing the texture.

Seaweed has been found to play a beneficial role in the fight against obesity, control of diabetes, thyroid conditions, breast cancer and cardiovascular disease.

"When you also factor in the health benefits of seaweed, this has the potential to have a massive effect on the food industry," stated Fairclough.

Seagreens seaweed granules have proven safe in levels of heavy metal, organic pollutants and microbial load. Industrial interest is developing in sausage-like meats and bakery items. Though research is still in its beginning stages, the project may revolutionize the food industry and improve public health. **UB**

"When you also factor in the health benefits of seaweed, this has the potential to have a massive effect on the food industry..."

Chef Michel Roux: a simple food from a top chef

French chef Michel Roux is a legend among culinary experts. With his beginnings in the cooking world at age 14 as an apprentice pastry chef, he himself admits that regarding pastry, there are few who know as much as he does. Along with his brother Albert, Michel Roux opened Le Gavroche, a restaurant which transformed Britain's dining experience, and has since won three Michelin stars.

Roux has also been awarded the Meilleur Ouvrier de France for patisserie and the Chevalier de la Legion D'Honneur, and in 2002 he was the recipient of The International Center in New York's Award of Excellence. Who better than such a culinary accredited master to write a cookbook about the egg, one of the simplest and most complete foods of all?

"I have decided that it is time for me to write a book about this most fragile and defenseless of foods," says Chef Michel Roux in his book *Eggs*. "To bestow the egg the honor it deserves...When I hold an egg in my hand, I feel it represents the image of the universe and it awakens and increases my respect for life."

The versatile egg, as described by Roux, is highly nutritious and adaptable enough for the quickest of meals or the most elegant of banquets. Michel Roux takes delight in the uncomplicatedness of foods and is able to convey his expertise in an elegant style—Exactly why he is the ideal author to write on *Eggs*. Even the more complicated recipes are explained in a step-by-step fashion in his publication.

Each chapter is based around a style of cooking eggs, from boiling, frying, poaching, baking and scrambling to making the perfect omelet, crepe, soufflé, meringue and custard. Michel Roux revisits classical recipes and gives them his modern twists.

While Roux has handed his day-to-day running of his restaurants to his son, he is still passionate about his food and partakes



© Photo courtesy of Phil Guest

in lectures and in giving master classes. His real food passion is helping young people and giving them an opportunity in the field. **UB**

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The next big fish...

Barramundi: the catch of the day



Barramundi (*lates calcarifer*) is a white fish native to the tropical, estuarine waters of northern Australia and parts of Southeast Asia. A highly sought-after sportfish, barramundi is also a popular table fish that is prized for its sweet, buttery flavor and moist, meaty texture. It has the mild profile that is preferred by most consumers and is increasingly being hailed as "The Next Big Fish." Embraced by chefs and consumers since its inception, barramundi has made tremendous inroads into the U.S. and global marketplace in the past three years, due largely to the efforts of Australis Aquaculture, the Massachusetts-based company that is sustainably raising

barramundi in U.S. and Vietnam. The Company spearheaded the popularity of barramundi worldwide, and offers a line of fresh and frozen barramundi to the retail and foodservice markets.



Since its inception, Australis has been committed to sustainability—branding their product as The Better Fish®- Better Tasting, Better for You, and Better for Our Environment. The company is a recognized leader in the sustainable seafood movement through its pioneering practices in sustainable aquaculture. Its U.S.-farmed barramundi is ranked a 'Best Choice' by all of the leading environmental organizations, and in 2007 Australis was named the 'Australian Sustainability Company of the Year for the Environment.'

Australis employs a number of sustainable practices that address the major criticisms levied against the fish farming industry. These include minimizing the use of fish meal and fish oil to achieve a feed conversion ratio of less than 1:1, eliminating the risk of escape and interactions with predators and wild fish stocks, and minimizing water pollution through the use of patented water filtration and recycling techniques. Controlled farming practices and low density stocking eliminate the need for antibiotics to control disease, while hormones, colorants and other additives are prohibited. The company's patented water re-use system results in minimal water discharge and almost no solids or nutrients leaving their facilities and strict and ongoing testing reveals no detectable mercury, PCBs or other contaminants.

As a carnivorous fish, barramundi has the rare ability to synthesize high levels of Omega-3 fatty acids even when fed a largely vegetarian diet. When raised in Australis' innovative farming system, it produces high levels of omega-3—levels comparable to wild

Coho salmon, which is unheard of for a mild-flavored white fish. This combination of no therapeutics, undetectable contaminants and high Omega-3s make Australis barramundi a very attractive choice for health conscious consumers while improving the sustainability profile of retail and restaurant customers' seafood offerings. Says Australis President, Josh Goldman, "With the heightened concerns over seafood safety and sustainability, plus increased consumer interest in healthy and convenient products, Australis Barramundi's mild flavor, versatility and eco-friendly pedigree offers retail and foodservice customers a unique new product to attract consumers and drive category growth."

The company's fresh product is raised in Turners Falls, MA where Australis operates one of the largest indoor aquaculture facilities in the world, producing 1,000 metric tons (2.2 million pounds) of fresh barramundi annually (available in whole round, skin-on fillets and live). Frozen product is sourced through the company's contract farms and company-own hatchery and grow-out operation in Central Vietnam which is expected to produce 3,000 metric tons (over 6 million pounds) by late 2009, and 10,000 metric tons (22 million pounds) in the next 5-7 years. Australis' frozen line is available in high-end, stand-up retail bags and bulk packs. All frozen products are IVP, skinless and boneless, and well trimmed for appearance.

For more information, visit: www.TheBetterFish.com. 

"...Australis Barramundi's mild flavor, versatility and eco-friendly pedigree offers... a unique new product to attract consumers and drive category growth."

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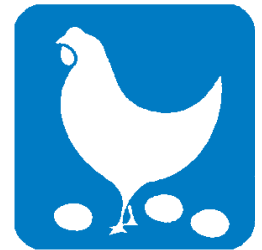
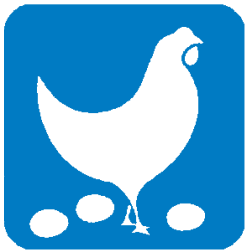
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- 2. Wingstop Announces Major Expansion for Northeastern U.S - 10/20/08**
- 3. Justice Department Files Suit to Block JBS from Acquiring National - 10/20/08**
- 4. Pilgrim's Pride Developing Business Plan to Meet Financial Challenges - 10/17/08**
- 5. Obama's Impact on the Food Industry - 11/6/08**
- 6. Smithfield Foods Completes Sale to JBS - 10/23/08**
- 7. Food Companies Keeping Prices High - 10/20/08**
- 8. California Passes Proposition 2 - 11/5/08**
- 9. Troubled Iowa Meatpacker Defaulted on Loan, Bank Says - 11/3/08**
- 10. Poultry Industry Lays an Egg in N.C.; Two Biggest Producers Post Huge Losses - 10/29/08**

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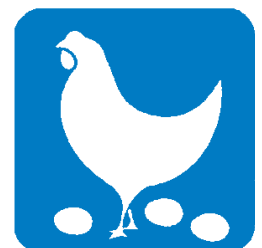
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Barnegat Bay shellfish restoration program



Shellfish harvesting was one of the main industries on which the early economy of Ocean County, NJ was built. The Barnegat Bay Shellfish Restoration

Program (BBSRP), in a joint effort with Rutgers Cooperative Extension of Ocean County and NJDEP Division of Fish and Wildlife Bureau of Shellfisheries, has been restoring the shellfish beds in Barnegat and Little Egg Harbor Bays in NJ for the past four years. This program offers both environmental and educational benefits. In addition, it helps people understand their role in protecting water quality and restoring some of the natural resources

that support a healthy environment for the estuary. Through community volunteers, it has allowed citizens to become stewards of the environment, not just visitors to it. It has also increased a general awareness and understanding of how human actions can degrade the bay and watershed and it also allows them to create actions that have a more positive impact for the future.

"BBSRP's mission is to educate the citizens...about the coastal bay, its watersheds and peoples' impact on these natural resources..."

BBSRP's mission is to educate the citizens of Ocean County NJ about the coastal bay, its watersheds and peoples' impact on these natural resources by using the hard clam and oyster as living representatives of the bay's ecosystem. The process includes setting up land-based and in-water shellfish nurseries.

Once the shellfish have grown, clams are initially placed in the bay covered with predator control screens, and oysters are placed directly in areas of natural oyster habitat. When the clam seed has a better chance of survival, without predator control, the small clams are broadcast planted in public areas for conservation and/or eventual harvest. The oysters are similarly planted on public ground which may be designated for conservation and/or harvest in accordance with established regulations.

A spin-off non-profit organization of BBSRP, ReClam the Bay, Inc. (RCTB), helps with volunteer organization, shellfish nursing, gear maintenance, fundraising and environmental

education. RCTB won a Governor's Award for Excellence in Tourism for the "Clam Trail" this year. The "Clam Trail" was created as an educational centerpiece to the program. It is a family fun activity which is similar to that of a treasure hunt. People of the community visit giant clams which are painted and placed in various shops and points of interest (museums, upwellers, Barnegat Light House, etc.) throughout the county. At each point on the trail there is a "Fact Plaque." The object of the activity is to record certain information that is found on the plaques. Prizes are awarded for points that are earned through the fact-gathering by the Rutgers Cooperative Extension office. The object is to teach citizens about shellfish and the bay.

To promote the clam trail, 15,000 maps have been distributed at more than 50 locations across Ocean County, NJ. People of the community are learning about shellfish, water quality, and the Barnegat Bay in a fun and entertaining way. **UB**

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One of the many brightly painted "giant clams" that can be found along the "Clam Trail". (This one, located in Toms River, New Jersey, is sponsored by Urner Barry.) ▲

A sign of the times...

Coupon clippers saving billions



©iStockphoto.com/Graça Victoria

Coupon clippers seemed like a dying breed. Years of decline in the use of coupons forced food companies to become increasingly creative in their efforts to steer consumers to their products. However, as early as 2006, when food prices started to escalate, coupon use began making a comeback. Blogs and instructional Web sites sprouted up and coupon clipping has been enjoying a resurgence in popularity. This was the beginning of a new trend in clipping that reversed a 15-year period of decline.

"Coupons motivate customers. They're more likely to go with a store that offers coupons,"

In 2008, the USDA initially forecasted food prices to rise by 5% to 6%, making it the largest annual increase since 1990. Yet in November 2008, industry economists forecast food prices would climb higher yet, between 7% and 9% in 2009—boding well for retailers looking to cash in on increasingly price-conscious consumers.

Other businesses are also seeing gains. Valpak, who distributes its coupon laden envelopes to about 45 million homes

each year, says that use of its coupons has increased 8% since last year for groceries and take-out food, along with home improvement products and specialty retail. Increasingly restrictive redemption rules don't seem to have hurt large retailers. According to the Promotion Marketing Association (PMA), couponing at big box retailers is up 14%.

"Coupons motivate customers when they're looking at different stores that offer the same goods. They're more likely to go with a store that offers coupons," Valpak spokeswoman Marsha Strickhouser said in a recent CNN interview.

Regardless of one's disposition towards coupons, this is big business for food producers and retailers alike. According to the PMA, in 2007 89% of Americans used coupons saving \$2.6 billion in the process. Consumers are, however, increasingly using coupon Web sites instead of the traditional cut and carry variety. According to Scarborough Research, a premier source for consumer shopping insights, 11% of households now obtain coupons via the internet—an increase of 83% since 2005. However, the Sunday newspaper remains the number-one place for acquiring household coupons—53 % of households clipping savings from it.

Other leading places for acquiring coupons include the mail (35%), in-store coupons (33%), preferred customer/loyalty cards (22%), in-store circulars (22%), weekday newspapers (17%), product packages (17%) and magazines (15%). All of the categories have undergone growth since 2005, though none at the level of internet coupons.

Whether traditionally clipped from the Sunday paper, or retrieved from one of the many coupon-oriented Web sites, coupon clipping is enjoying a comeback spurred on by the increasingly stretched consumer dollar. Food producers, distributors and retailers will need to gear their promotional agenda towards today's consumer and their new found love of coupon clipping. **UB**

COUPON FACTS

Source: Promotion Marketing Association's Coupon Council

- ✂ **89%** of the United States population uses coupons.
- ✂ Shoppers saved approximately **\$2.6 billion** last year by using coupons.
- ✂ The typical coupon was worth **\$1.25 savings** in 2007
- ✂ Coupon users report an average of **7% savings** on their grocery bill with coupons.
- ✂ The typical family saves between **\$5.20 and \$9.60 per week** using coupons.
- ✂ Manufacturers offered more than approximately **\$350 billion** in coupon savings in 2007.



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Ethnic trends impacting customers at the meat case

With the Hispanic population experiencing tremendous growth, the National Cattlemen's Beef Association's (NCBA) Beef Checkoff Program recognized the need to assist mainstream supermarkets with merchandising beef more effectively to this group. It is predicted that by 2012, 1 out of 6 people in the U.S. will be of Hispanic origin with this group spending

an average of 42% more on beef purchases than any other group!

Results of a pilot test indicate that the Checkoff-funded "Hispanic Toolkit" was successful in boosting sales of beef cuts preferred by Hispanic customers at mainstream supermarkets as it provided meat department staff with tools to better

identify and merchandise these cuts, and improved communication between store personnel and customers. During this period, test stores achieved a significant sales increase of 28 percent for beef cuts preferred by Hispanics compared to the sales of the same cuts in control stores.

"Hispanics responded favorably to the changes in the test stores, and 88% bought seven or more times at a test store during the test period vs. 68% at control stores. In addition, 83% of test store respondents said they would recommend this store to others given the changes seen vs. 57% for control stores," Retail Marketing Group said in a press release.

Results of the Toolkit found the most important motivators for Hispanics when selecting

a store to purchase beef were price, proximity to home, quality of meat, freshness of meat, and wide selection of thin cuts.

Consumer response to the Hispanic Toolkit was

very positive. More than 90 percent of the intercept participants picked up the *Beef Cuts and Dishes Dictionary* while at the meat case. Additionally, almost all of the respondents who picked up the dictionary rated it as excellent or very good. The bilingual recipe labels also performed very well with customers. Overall, 18 percent of test store respondents who noticed the bilingual recipe label said they purchased a beef item because of the label.

NCBA feels that with the continual growth of the Hispanic population it is important that retailers take time

"NCBA feels that with the continual growth of the Hispanic population it is important that retailers take time to understand the preferences in this segment."

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The Beef Checkoff-funded Hispanic Toolkit was designed to help supermarkets across the country better serve their growing Hispanic customer base by providing beef cuts and information needed to prepare authentic Latino dishes.

to understand the preferences in this segment. Therefore, the "Beef Hispanic Toolkit" was developed to assist meat department staff to market to Hispanics. The toolkit included: Bilingual Peel-off recipe labels; a bilingual beef cuts & dishes dictionary; a bilingual beef cuts & dishes poster; elements for a mini-carniceria case section; labels for the three most popular

Mexican beef cuts; and a manual on how to best market beef to Hispanics.

As Hispanic shoppers are likely to be shopping the center aisles of supermarkets now, showing them you care by understanding their needs will drive increased sales and repeat Hispanic business at the meat case. **UB**

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National Turkey Federation offers tips to fight escalating food costs

*Contributed by the
National Turkey Federation*

Because these are tough economic times, National Turkey Federation (NTF) is helping consumers and foodservice operators trim their food budget with a recipe for combating climbing food prices. Higher feed costs can translate into higher prices for producing turkeys and other meat and poultry products, which might ultimately mean higher prices at the grocery store or at restaurants. Therefore, NTF developed a resource on its Web site, www.eatturkey.com, with easy modifications that can save both time and money.

The turkey industry's biggest economic challenge is a federal mandate that diverts corn from the feed supply into ethanol that

“NTF also points out that the versatility and health profile of turkey adapts well with many flavors and preparation techniques, and is an easy protein to feature as a special or signature dish.”

is blended into the nation's fuel supply. With corn as the principal ingredient in poultry feed, this has meant significantly higher input costs for turkey producers. NTF and its members would like to see the government eliminate the mandate as one way to ensure that consumers and

foodservice operators don't continue to see rising food costs.

For consumers, trimming the grocery bill begins before stepping foot in the supermarket. NTF recommends reviewing advertised weekly specials at the local supermarket, clipping coupons, evaluating the yield of products such as ground turkey and considering such economical turkey parts such as wings, drumsticks and thighs.

For restaurateurs, NTF has tips and ideas for ways to streamline the rising costs for foodservice operators, while continuing to satisfy customers. Sharply higher commodity costs and continued food price inflation create a need to carefully evaluate daily operational practices and make modifications to succeed in these

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tougher times.

NTF recommends that restaurateurs start by evaluating their menus and assessing what dishes are winners and those that could be eliminated. Also, renovating the menu to take advantage of areas of growth such as breakfast, and adding specials and incorporating signature presentations that provide value will help the operation as well as keep the customer coming back. NTF also points out that the versatility and health profile of turkey adapts well with many flavors and preparation techniques, and is an easy protein to feature as a special or signature dish.

Whole turkeys also offer a great opportunity for savings to any consumer or foodservice operation because of the variety of recipes suitable for dark and white meat. Turkey breasts provide an endless supply of delicious and healthy entrees; turkey thighs, legs and wings offer versatility and economy, and are perfect for making healthier signature sausages; and the turkey carcass and giblets can be

used for preparing soups and stocks. Consumers and operators can find more than 1,600 recipes in NTF's searchable recipe database at www.eatturkey.com. To make it even easier, users can fine tune their search by such categories as dish type, ethnicity, meal type, occasion, preparation method or product type.

To see NTF's cost saving ideas for consumers and foodservice operators, visit <http://www.eatturkey.com/consumer/cookinfo/groceryprices.html> or <http://www.eatturkey.com/foodsrv/value.html>. **US**



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THE REPORTER'S GUIDE TO... **Lamb Chops**

The term lamb chop, in itself, is very vague as several factors are key in determining the quality of a lamb chop. Primarily, lamb chops either come from domestic product raised on corn or from imported product which has most likely been grass fed. Lamb, the meat from the carcass of a young sheep, is a lean red meat with a mild,

but distinctive flavor. Many have said that lamb's unique "wild" or "gamey" flavor is more prevalent in imported product, while domestic corn fed product is said to have less of such a taste or smell to it.

Additionally, lamb chops can come from a variety of primal cuts. They can be derived

from the rack, loin, shoulder and leg—all with different flavorings, tenderness and quality. Chops from the loin and rib are generally considered to be more tender. Cuts from the shoulders and legs are typically less expensive and can be just as tender, however, are not usually as visually attractive to the consumer.



Lamb Rib Chop

Rib and Loin Chops from the rib and loin are generally more prized, more tender, leaner, and an overall tastier cut of lamb. These qualities do come at a price, as the rib and loin chops are commonly the more expensive of the various lamb chops. The rib chop normally contains more fat than the loin chop and is therefore often more flavorful. Loin chops are cut from the loin roast section after it is sliced crosswise into individual chops. When cut from both sides of the backbone, chops are then referred to as double chops. Differences exist in the way rib and loin chops are prepared. Rib chops are usually prepared by broiling, grilling, pan-broiling, pan-frying, roasting, or baking. Whereas, loin chops are typically prepared by broiling, grilling, pan-broiling, or pan-frying.



Lamb Loin Chop

Shoulder and Leg Shoulder chops are very flavorful and often more economical than other chop cuts. That being said, the tenderness in the shoulder chop is highly varied. Blade chops, from the back side of the shoulder are often said to be even more tender than the arm chops from the front side. Chops cut from the sirloin end of the leg are easily identified as they are from the crosscut section from the leg bone. Leg chops are generally very meaty, making for a larger and more economical chop. Preparations for the shoulder and leg chops are slightly different. Shoulder chops are usually prepared by braising, broiling, grilling, pan-broiling, or pan-frying. Arm chops are typically prepared in the same manner with the exception of the pan-frying. Leg chops, on the other hand, are usually prepared by broiling, grilling, pan-broiling, or pan-frying. **US**



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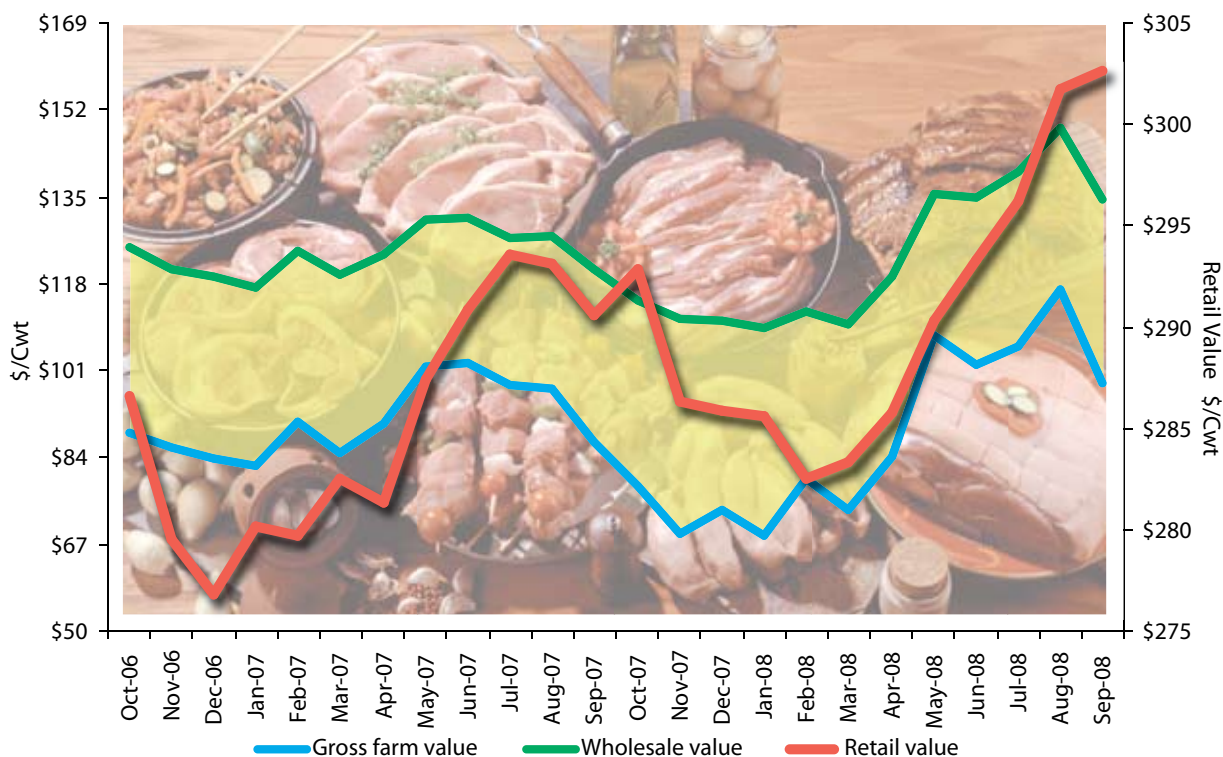
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Retail value at all-time high...

Pork price spreads and retail value

The orange line indicates the retail value of pork and it is represented on the right vertical axis. The line shows that retail values as of September are at an all-time high. The blue and green lines show the spread between gross farm value and wholesale value represented on the left vertical axis.



Source: Economic Research Service, USDA

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Snake: Unusual delicacy

For many, snakes represent an inner fear that one never seems to outgrow. Throughout history the snake has been a paradoxical symbol of strength and power, but also of danger. To others, however, they make a good meal. Snake dishes

can be found in most Asian countries, as well as in many parts of the Midwestern United States. In Asia it is customary to eat many different types of snakes; rat snakes, rattlesnakes, boa constrictors, cobras, king cobras, and most garden snakes. Here in the U.S., however, only two varieties are mostly used for feasting; rattlesnakes and garden snakes.

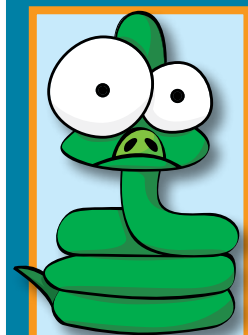
Snake meat is said to have a lean and chewy texture that becomes tough and stringy when cooked at too high of a heat. It is known as a chameleon meat, meaning that the flavor can resemble both fish and chicken, depending on which it is most prepared like. It is also said to be a good substitute for chicken

or fish in almost any recipe. Snake is most commonly prepared fried, poached, or put into a soup, and venomous snakes are used to make different types of wine and alcohol.

A very good source of protein, snake meat is said to warm the body, cure rheumatism, increase blood circulation, and act as an aphrodisiac. In China, men take shots of snake bile to increase their sexual vigor. The Chinese also make mixed drinks out of snake blood and hard alcohol.

"Snake meat is known as a chameleon meat meaning that the flavor can resemble both fish and chicken, depending on which it is most prepared like."

Your local market is not likely to carry snake meat, however, caution is advised if purchasing outside of the United States. Human consumption of snake meat, especially when eaten raw, may lead to dangerous parasitic infections in humans. You wouldn't want your latest eating adventure to land you in the local hospital! **UB**



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Eye on dining...

Atlanta's eateries bring out the best in Southern cooking

The mere mention of Southern food brings to mind church picnics, dinner at Grandma's, and overflowing breakfast feasts. It's fried chicken, barbecue, hushpuppies, shrimp and grits, macaroni and cheese, collard greens, banana pudding, and peach cobbler. In short, it's

comfort food par excellence.

Thanks to places like Dreamland BBQ and Fat Matt's Rib Shack, you can still get a taste of the really good life. More often than not though, Atlanta's chefs have taken these venerable culinary traditions

and updated them, adding a continental touch that enhances the basics. Canoe, for example, offers mountain trout and local rabbit, dressed with fresh herbs and light sauces. The bounty only continues from

there, and modern cuisine runs rampant in this food-loving city. Elegant Bacchanalia's international reach, Joël's French dishes, and Floataway Café's eclectic ambience all hint at Atlanta's fabulous options. Great steaks and seafood are welcome standards too, and although high-end establishments like the venerable Palm, Morton's, and Ruth's Chris, are abundant, so too are low-brow eateries that will satisfy your cravings.

Hot-Lanta, is moving on up in the culinary arena. There is now a plethora of dining opportunities within walking distance of the convention and hotel area. For a truly unique experience I would recommend Restaurant Eugene, a James Beard Foundation award winner for 2008, for that night out after a long day at the show. **LB**

"...modern cuisine runs rampant in this food-loving city."



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A new form of meat science

What's on the menu tonight? Grass-fed Angus beef from Colorado, or serum soaked in vitro beef from the lab? While the latter option may not have that mouth-watering ring to it, it very well may be a realistic option for your dinner plate in the near future. Scientists in several countries are now experimentally growing in vitro meat from stem cells in the hopes of fulfilling the world's demand for meat, and to create one really amazing burger!

"The process behind this act of creation relies on the ability to take stem cells from an animal and compel them to multiply..."

fibers of traditional meat.

While the current cost of in vitro meat is prohibitive, industrial production would be considerably cheaper - allowing for the production of a lot of protein at a low price.

Additionally, in vitro meat would be less prone to disease and economically damaging culls could be avoided. The meat would also be free of the growth hormones and antibiotics that are fed to many animals.



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And you can forget about that guilty feeling you get after devouring a deliciously fatty cheeseburger. By uniformly altering and enhancing the meat, in vitro burgers could have the fatty acid profile of salmon and make a nice addition to your list of health foods. So if you're looking for a cheap and healthy source of protein, just pass the petri dish. **LB**

The concept of in vitro meat is nothing new to scientists. For years, stem cell researchers have been busy growing artificial muscle and connective tissue for the medical community to repair damaged hearts and muscles. Yet the idea of producing meat solely for the kitchen table is a novel one. NASA was the first to delve into this area by creating goldfish meat as food for astronauts on long voyages. They also plan to grow in vitro meat alongside hydroponic vegetables during lengthy stays in space.

The process behind this act of creation relies on the ability to take stem cells from an animal and compel them to multiply and differentiate into muscle cells which eventually form muscle fibers. For these cells to mature, they need to be bathed in a nutrient-rich solution and stimulated to move, just as the muscles in a living animal would move from natural exercise. Since you can't put stem cells on a treadmill to workout, scientists found a way to simulate this movement by giving electric jolts to the cell serum. Through this electric stimulation, the cells transform from what scientists describe as a meat-flavored gelatin substance to the textured and striated

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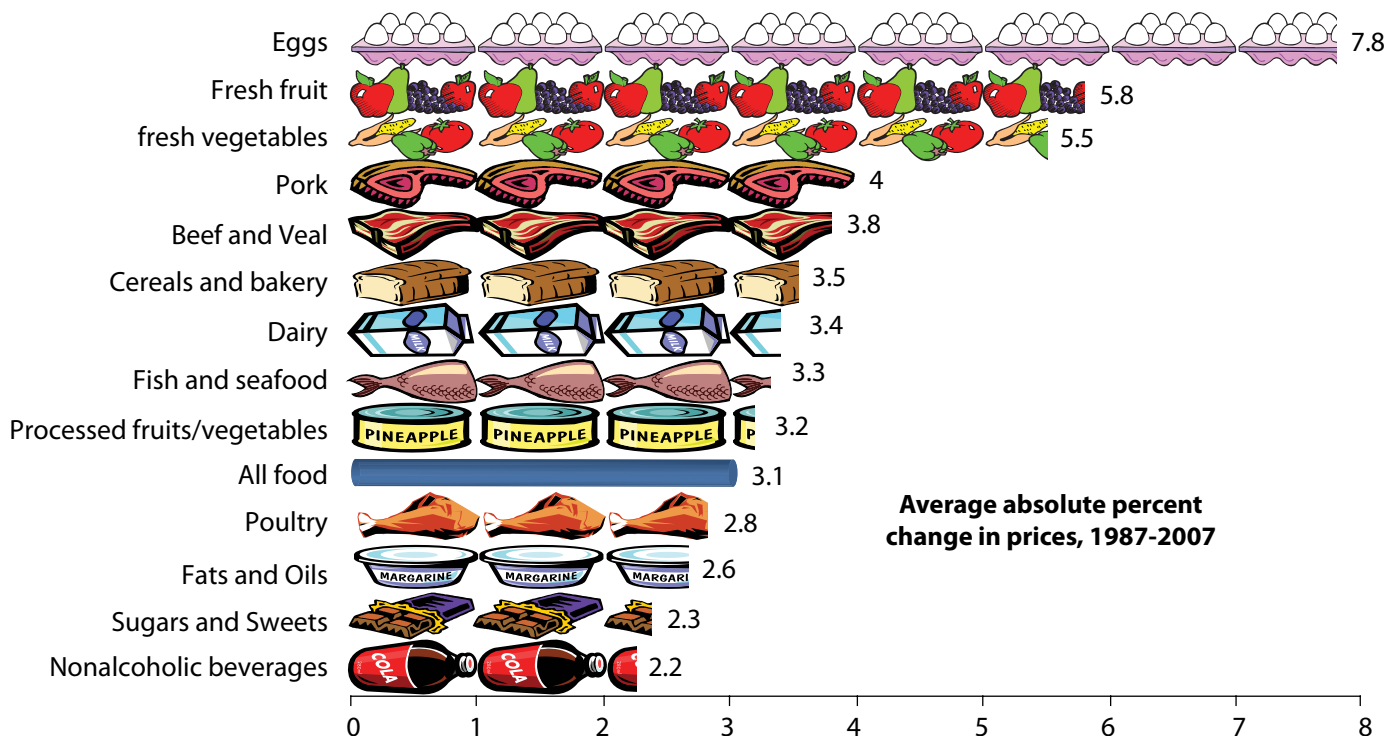
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Culinary arts class takes to the seas



In 2005 Holland America Cruise Line launched an onboard culinary program on each of its premium ships which has taken the seas by storm. Since its inception, the line's "Culinary Arts Program" has doubled, and this year more than 70 culinary experts are participating.

"The Culinary Arts Center is a guest favorite," said Richard D. Meadows, CTC, executive vice president, marketing, sales and guest programs. "We will continue to expand the program and provide our guests with the culinary experiences that have made it such a success."

Tastings, culinary demonstrations, and hands-on cooking classes are part of the line's itinerary for each premium ship. The line expanded the program when it partnered with *Food & Wine* magazine which offered select cruise guests the opportunity to experience demonstrations and seminars conducted by a wide diversity of culinary experts.

"We will continue to expand the program and provide our guests with the culinary experiences that have made it such a success."

Onboard theater-style venues include fully equipped show kitchens where well-known guest chefs perform cooking demonstrations and seminars with two large plasma screens displaying overhead and close-up videos of the food preparation. Small groups take part in interactive cooking classes. Most one-week Holland America culinary cruises schedule a minimum of two demonstrations with two or more participation classes. After the 45-minute to one hour demonstration everyone in attendance gets to sample the dishes prepared on stage!

To make the culinary cruise more thrilling,

Holland America joined forces with a diverse group of culinary experts — from celebrity and executive chefs and fromagers to authors and sommeliers. "Guests will learn from and mingle with these renowned chefs and culinary authorities using our state-of-the-art show kitchens," said Meadows. "This is an exciting partnership and we are delighted to be working with *Food & Wine* magazine to bring the culinary experience alive for our guests." **UB**

Holland America Line's Culinary Arts Center provides guests the opportunities to learn food preparation and cooking techniques during the hands-on cooking classes by award winning chefs and culinary staff.



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3. **SCOM** - Five confirmed dead, 4 rescued after 15 hours, small factory vessel sinks 100 miles from Adak - 10/23/08
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6. **SCOM** - Massive assault on pollock sustainability coming from Greenpeace as stock shows serious decline - 10/9/08
7. **SCOM** - Alaska Opilio and King Crab quota changes likely to be minor - 9/18/08 - 308
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9. **SCOM** - Trident locks up deal for 100,000 tons of certified, traceable Alaska pollock with Russian partner - 9/30/08
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Eggs Benedict:

a rich meal with a rich history

By Greg Deppeler
Urnier Barry Market Reporter

Little did I realize when I “volunteered” to author this article the volume of research that would have to pored through in an effort to become as knowledgeable as possible on the subject of Eggs Benedict. However, as an Egg Market Reporter, I deem it both my corporate and professional responsibility to become as educated as possible on anything directly, or even related to my area of expertise. So, with no further adieu, let us plunge bravely forward.

The history of Eggs Benedict runs broad and deep. Several variations of the dish’s origin exist, any of which could be completely or partially true. One suggests that the Waldorf Hotel in New York City, near the end of the 19th century, created the dish at the request of a stockbroker to relieve a morning hangover. It is said to have originally consisted of toast, crisp bacon, poached eggs, and hollandaise sauce, with English muffins and ham shortly thereafter being substituted for the toast and bacon. Another suggests that it originated at the famed Delmonico’s Steak House (also in New York City)

“...suggests that the Waldorf Hotel... created the dish at the request of a stockbroker to relieve a morning hangover.”

in the second decade of the 20th century, created at the request of a patron (the wife of noted yachtman and banker Commodore E.C. Benedict) who suggested a dish to the maitre d’ hotel consisting of English muffins, poached eggs, ham, hollandaise sauce and a truffle. Still another has the dish invented in France, and made of brandade (a puree of salt cod and potatoes), spread on fried bread, topped by a poached egg topped with hollandaise sauce. The mixture of the

EGGS BENEDICT

INGREDIENTS:

Hollandaise:

4 egg yolks
3 ½ Tbs. lemon juice
1/8 tsp. Worcestershire sauce
1 Tbs Water
1 cup melted butter
¼ tsp salt
Pinch of white ground pepper

Basic Benedict:

1 tsp distilled white vinegar
8 bacon strips
8 eggs
4 English muffins
Butter
enough chopped chives or parsley for garnish

Hollandaise: In a double boiler, fill the bottom part way with water, being careful NOT to allow it to touch the top. Bring to a gentle boil. In the top, whisk together 4 egg yolks, 3 ½ tablespoons of lemon juice, a pinch of white ground pepper, 1/8 teaspoon Worcestershire sauce, and 1 tablespoon of water. Add one cup of melted butter to the yolk mixture SLOWLY, whisking constantly until all the butter is incorporated. Whisk in ¼ teaspoon of salt. Remove from heat, and put a lid on to keep it warm.

Basic Benedict: Heat oven on broiler setting. Fill large saucepan with 3 inches of water. Bring water to a gentle simmer, and add 1 teaspoon of distilled white vinegar. Fry bacon. Gently break 8 eggs into simmering water, and allow to cook for 2 ½ minutes. Remove with a slotted spoon, and set on a warm plate. Toast 4 English muffins, halved, in the broiler. When completed, butter the muffins, add 1 slice of bacon halved, place a poached egg on top, and drizzle with the Hollandaise sauce. Sprinkle with chopped chives or parsley, and serve immediately.

salt cod and eggs suggest it was originally a Lenten meal possibly dating as far back as the Renaissance.

Many variations of Eggs Benedict exist. By substituting one or more items in place of the more traditional fare, several names can be assigned to the same dish depending upon the region of the country it is consumed. Some of the more popular are:

1. Seafood Benedict, which substitutes crab, scallops, shrimp, or lobster for the bacon or ham. Individual variations may be known by the specific shellfish contained.
2. Eggs Florentine, which (essentially) layers spinach over the ham slice, prior to the placement of the poached egg.
3. Salmon (or Pacific) Benedict, which replaces the bacon with smoked salmon.
4. Country Benedict, which replaces the ham, muffin, and hollandaise with a biscuit, sausage patties, and country gravy.

5. Irish Benedict, where corned beef hash is used for the meat.
6. Dutch Benedict, which uses scrapple for the meat.
7. Waffle Benedict, which replaces the muffin with a waffle coated with maple syrup.
8. Jersey Benedict: Pork Roll, indigenous only to New Jersey, is substituted for the ham or bacon.

Of noted interest, the breakfast staple at McDonald’s, the Egg McMuffin, was created by a franchisee in 1972 who, aware of Ray Kroc’s fondness for Eggs Benedict, decided to create the “poor man’s version” by replacing the Hollandaise with a slice of American cheese. Whether traditionally prepared or served in one of its many variations, Eggs Benedict is a delicious breakfast staple guaranteed to please the palate and satisfy the hungriest of appetites. **UB**

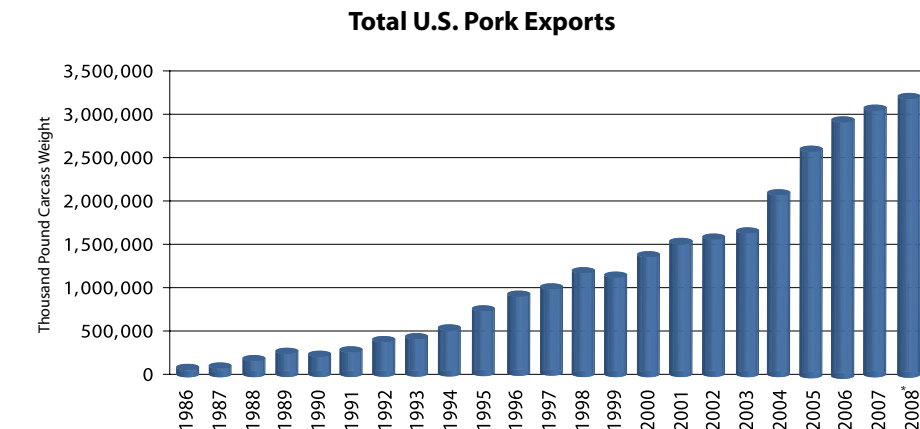


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Pork exports exceed 2007's total in

Despite growing concerns about the global financial crisis, U.S. pork exports are setting records. While the Dow is down roughly 35 percent year-to-date, pork exports are up 69 percent. According to U.S. Meat Export Federation, August pork exports, at nearly \$444 million, have pushed this year's export value past 2007's year-end amount. From January through August 2008 exports totaled \$3.21 billion in value, compared to \$3.15 billion in all of 2007. Looking at USDA data, volume for the first eight months of 2008 totals 3.3 billion pounds, compared to 1.9 billion pounds the same time last year, and 3.1 billion pounds for all of 2007. Pork exports for the balance of the year will only add to these record levels.

Foreign trade, and especially the export component, has been the dominant story of 2008. All three quarters were in record-setting territory however, the flow has slowed during Q3. Best estimates place Q3 exports up 67 percent when compared to



Source: USDA *Note 2008 January through August

Q3 2007, and even with an increase that large, they pale to the 102 percent increase noted in Q2.

While the outstanding expansion in pork exports for the first half of the year can largely be attributed to the growth in the China market, the third quarter has seen

the beginning of a slowdown in this area. Imports to China have begun to contract. 2008's Q1 was up 186 percent compared to Q1 2007, and Q2 an astounding 314 percent, but Q3 has seen a 48 percent decrease in shipments to China.

That being said, improved growth in

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Judy Doster

first eight months of '08

other export markets has helped maintain overall export strength. Japan, Hong Kong, Mexico and Russia are all still posting large year-over-year gains. Japan remains the largest market for U.S. pork, and the slowdown in exports to China has allowed Mexico to resume the number two spot.

According to the USDA, China has exhibited a very high degree of volatility, particularly since the beginning of this

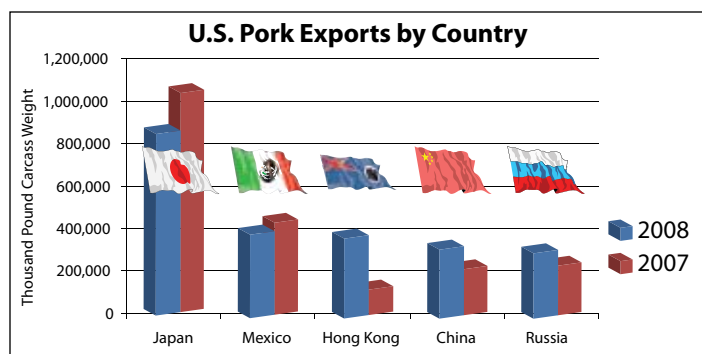
year. Factors internal to China, such as food price inflation, swine disease, and preparation for the summer Olympic Games, likely contributed to the volatility of import demand.

Looking ahead, the challenge for the pork trade will be managing the volatility. Pork exports have grown in each of the last 22 years. Continuing this trend will be no easy task in 2009 given worsening economic conditions worldwide. **LB**

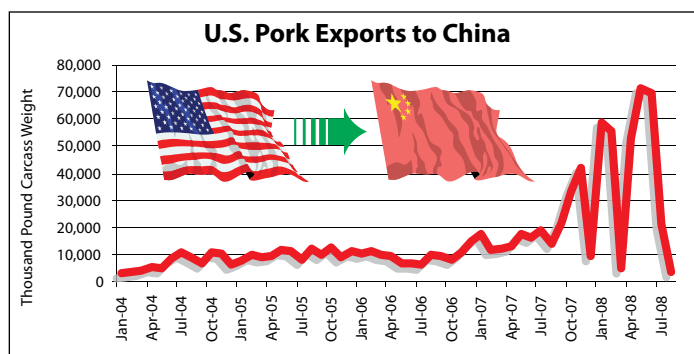


"...outstanding expansion in pork exports for the first half of the year can largely be attributed to the growth in the China market..."

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Source: USDA *Note 2008 Jan through Aug



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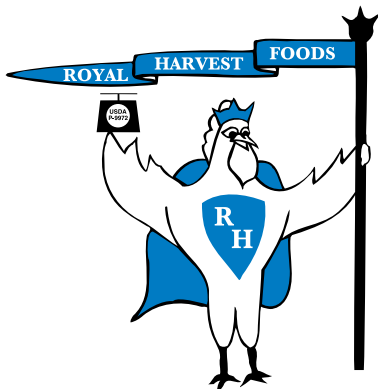
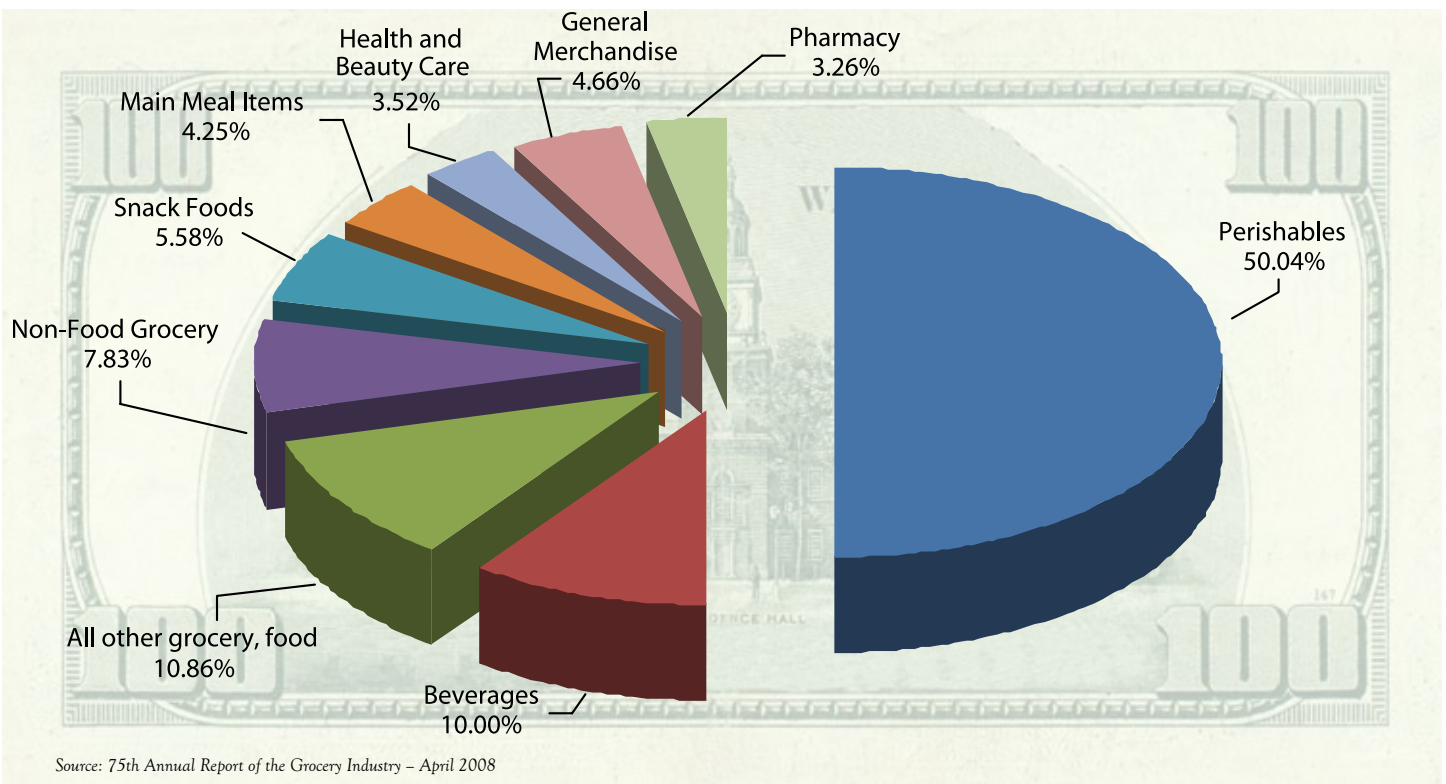
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Pork 101: three-day crash course

By Andrew Knox
Urner Barry Market Reporter

While it's true that some pork industry professionals were raised in rural areas and took part in 4-H clubs and hog judging contests, it's safe to say that many of them never grew up on a farm and had little experience with hogs before entering their career. I myself am one of those people, as the closest I had ever been to a farm was watching late night reruns of Green Acres. Luckily, for people like myself, there is a way to gain a wealth of knowledge and insight in only three days—a crash course introduction to pork known as Pork 101.

Hosted by the American Meat Science Association and the National Pork Board, Pork 101 is not just a lecture-based seminar packed with PowerPoint presentations and furious note taking. It offers a hands-on learning experience that had me elbows deep in hog carcasses. The three-day course is held at various university meat labs throughout the Midwest and takes full advantage of the facilities, professors, and staff. Designed for professionals involved in the production, processing, and marketing of pork, focus is placed on the quality and consistency issues in the pork industry today.

With the course's blend of in-class instruction and field study, not only did I find myself eye-to-eye and nose-to-snout with a real hog for the first time in my life, I had the chance to put my newly acquired skills to use by performing an initial evaluation of eight live hogs. Continuing with that mix of hands-on training, utensils needed for the course included pen, pencil, butcher knife, and bone saw as we processed an entire pig from head to tail, checking for quality at every step. Further processing techniques were also taught and put into practice. As a group we made and cooked our own hams, loins, sausage, and bacon. Attention was paid to curing methods, spices and seasonings, and the stuffing of hams and sausages with

various casings. As for the loins, specific comparisons were made between regular product and product that we enhanced by injecting a solution of water, salt, and phosphates to improve juiciness, texture, and flavor. A sample of low quality loins were used as well to further evaluate the effectiveness of enhancing pork and show just how well it can improve even poor cuts of meat. It was at that point that the culmination of

everything we had learned had brought us to one final and crucially important test for the course, the taste test.

For those who work in other meat industries and would like a similar learning experience, you don't have to feel left out. The Texas A&M University Meat Science Extension offers a three day Beef 101 class with dates in December, May, and June. Poultry 101 follows the same mold as well with classes held throughout the year at Auburn University, Texas Tech University, and the University of Arkansas. **UB**



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Economic stimulus check: satisfaction or sadness?

The economic stimulus package of 2008 saw the U.S. government issuing checks for \$600 dollars for individuals and \$1,200 for married couples, plus additional money if children were involved. That money is probably long spent. The check's main purpose was to give the economy a boost during times where economic activity was facing a major slowdown. Two-thirds of the U.S. economy depends on consumer spending and retailers began making plans to attract shoppers and their checks through the front door.

At Sears, for instance, if your entire stimulus check was spent on purchases at its store, the company would have given you 10 percent of that check back. Wal-Mart, on the other hand, offered shoppers



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free check cashing with additional grocery savings. Also, Wal-Mart refunded the fee charged when shoppers used their Wal-Mart Money card, a re-loadable pre-paid Visa card. Kroger grocery stores awarded shoppers free groceries through a nationwide gift card program after shoppers spent their entire stimulus checks with them – this was highly appealing to consumers, especially with food prices sky rocketing.

When times are tough, it is common for consumers to cut spending on discretionary items such as clothing and high-end goods, and spend on items of need. Mark Miller, a retail analyst for William Blair & Co. said “if you felt like things were tight and you had an extra 600 bucks, what would you spend it on? ...You would spend it on things you need.”

In May, just after the first checks began arriving, Wal-Mart reported a jump in same store sales of 3.9%. Eduardo Castro-Wright, Chief executive of the retail giant said that grocery sales were strong. Likewise, other stores, such as Costco Wholesale also reported gains.

By June, it was clear that the stimulus checks were helping. In fact, a better than expected growth gave many a sign of hope with the economy. Retail sales gained 4.3% with Wal-Mart Stores Inc. accounting

for the majority of the gain. Again, most of the gains were noted in grocery sales. Wholesale clubs, such as Costco and BJ's were also among the best performers. Yet, if Wal-Mart was excluded in the calculations, the sales tally was up only 1.9%. Ken Perkins, president of Retail Metrics LLC commented that the stimulus checks were only a “one time bump.” This wasn't a bad projection, especially when consumer confidence data revealed that figures were at their lowest levels in 40 years.

By July and August, the stimulus checks actually proved disappointing to retailers' sales even with the great incentives offered. As a matter of fact, August was the weakest month for retailers in the last six months.

Adrianne Shapira, a Goldman Sachs analyst said “We expect that as checks fade, so will sales.” It was a self-fulfilling prophecy, for that is what actually took place. Much of the money injected to the economy through these stimulus checks went to pay down credit card bills or fill up gas tanks. A survey made by TNS Retail Forward said that 28 percent of the people used their checks to pay off credit cards; 27 percent said they used the money to pay for groceries and gasoline, and 20 percent used it to add to a savings account. Only 11 percent responded that they used their checks for discretionary purchases. Michael McNamara, an executive with SpendingPulse, MasterCard retail's data service, said that most of the money was “flowing into the nondiscretionary areas like drugstores, food, and gasoline.”

Now that consumer spending has cut back, so too have store managers, by reducing expenses and keeping inventories low which typically translates into fewer sales and promotions. Although gasoline prices have fallen, unemployment still continues to rise and retail food prices are still high. For now, it seems that the rebate checks had a temporary and minimal impact on the health of the nation's retailers. **UB**

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Cows have a sixth sense...

Bovines sense Earth's magnetism

Birds, turtles, bees, whales and salmon are believed to use magnetic guidance when they migrate, now cows are shown to have this sense too. New research from European scientists claims bovines tend to align themselves with the Earth's north-south magnetic fields while they graze or rest.

"Amazingly, this ubiquitous phenomenon does not seem to have been noticed by herdsmen, ranchers, or hunters,"

German scientists give much of the credit for the discovery to the use of Google's satellite images. After studying the images of cows and deer, a pair of zoologists concluded that the animals align themselves in a north-south direction—congruent to the earth's magnetic field. Photos of more than 8500 cattle in over 300 locations around the world were studied, and it was found that approximately two thirds of them aligned themselves in a direction facing magnetic north.

The scientists did note that cows are known to align their bodies perpendicular to the sun on cold days to absorb heat, however, no findings on their preferred directional stance has been documented up to this point.

"Amazingly, this ubiquitous phenomenon does not seem to have been noticed by herdsmen, ranchers, or hunters," said the study, co-written by Sabine Begall of

Germany's University of Duisburg-Essen.

The study only included photos of cows that were resting on flat ground, and avoided ones that were near drinking or feeding areas. They were taken at many locations, at different times of day and in generally calm weather.

Despite the study's finding, scientists will need to conduct more research before they settle on the magnetic theory for good.

"Google earth is perfect for this kind

of research, because the animals are undisturbed by the observer," said Begall. **UB**



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Consumer food purchasing habits

Whether it's rising food and gas prices, or the plummeting stock market, consumers are feeling the effects of a tough economy, particularly in their everyday spending. Many research studies indicate that Americans are cutting back on discretionary

spending, such as eating out at restaurants, vacations, and entertainment. This change in lifestyle, and what seems to be a change in values, has affected consumers' food and grocery purchases. One would think that people eating out less, and eating home more would result with grocery sales reaping benefits. Unfortunately, consumers' behaviors at the supermarket are not that simple.



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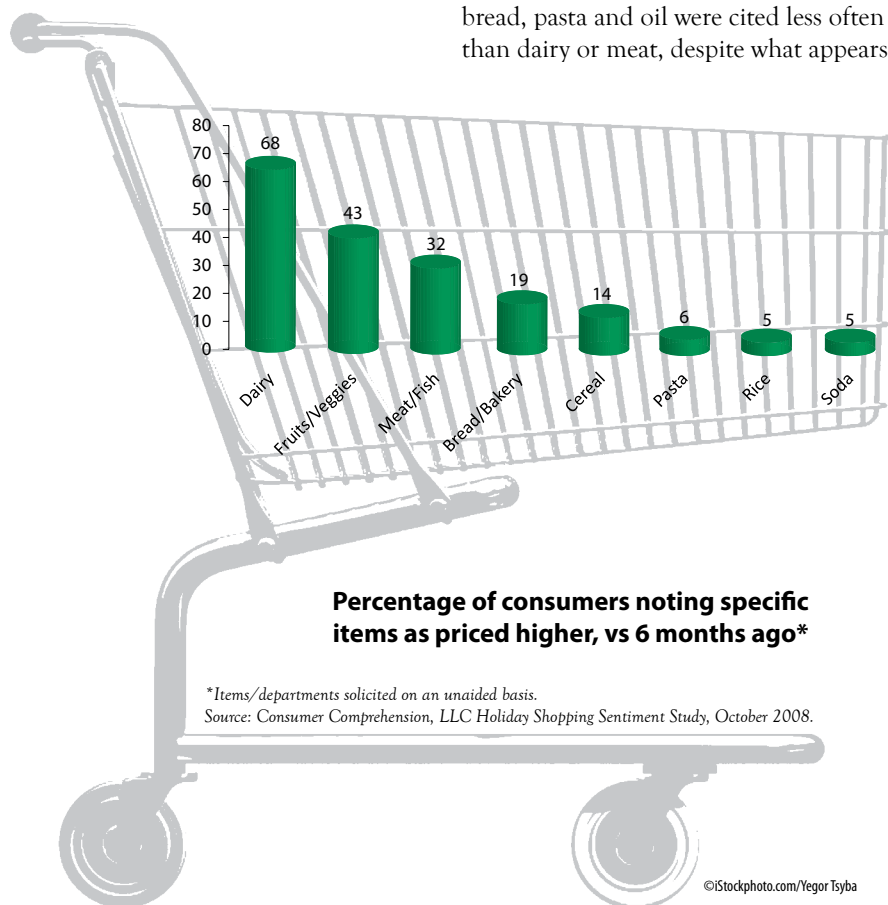
Every time a shopper enters a food retailer, they are faced with thousands of decisions and are continually weighing different brand options, against various product choices, against multiple pricing promotions. It's a constant balancing act for the consumer, with pricing and value options weighing even more heavily than before, due to the turbulent economy. Consumers are faced with price increases at

their local grocer and are taking notice. In a recent survey conducted by Consumer Comprehension, LLC, virtually every respondent (98%) reported overall food and grocery prices to be higher than six months ago. When asked which specific items were perceived to have the highest increases, perishable areas were hit the hardest, with nearly three out of four consumers naming dairy related items, and one-in-three noting meat. Interestingly, bread, pasta and oil were cited less often than dairy or meat, despite what appears

to be substantial increases in their retail pricing as well.

If perception is reality, then consumers' perception of prices, as related specifically to the product or category, may be just as important as the actual prices. Well, the reality is: commodity cost increases are causing higher retail prices at the store. When juggling a price adjustment, it is important to keep the consumer, and their attitudes and behaviors in mind, as well as your own business goals. Overall, shoppers tend to take greater notice of price fluctuations on the items they are most familiar with, or purchase most often, so 'handling' those items most delicately, from a pricing

"...shoppers are seeking value and are willing to trade-down if necessary."



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standpoint, is recommended. Additionally, being 'first to market' with any price adjustment will leave a lasting impression with the consumer, as evidenced by the significant recall in dairy items. Finally, shoppers are seeking value and are willing to trade-down if necessary. Consumer Comprehension's research also uncovered many shoppers reporting that they are purchasing different/lower cuts of meat, more poultry, and less non-essential items, in order to maintain their weekly food budget. As the consumer continues to weigh all her options during these tough times, offering the right product mix to meet ever evolving needs, is critical to sustaining her loyalty.

Consumer Comprehension, LLC is a Consumer Analytics and Strategic Marketing company, specializing in developing Customer Relationship Management strategies for retail and non-retail companies. **LB**

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California egg industry at impasse...

Proposition 2: Implementation and enforcement questioned

This past Election Day in California voters passed a ballot measure which set new standards of farm animal confinement practices.

Known as Proposition 2, the measure was approved by a margin of approximately 60% to 40% - much to the regret of many egg producers, business groups, veterinarians, and others who ran aggressive campaigns to keep it from passing.

"From the beginning, we knew we were fighting an uphill battle," read a statement from the United Egg Producers (UEP). "Animal rights groups succeeded in convincing voters in California into thinking Prop. 2 was about animal cruelty by using images of pets in their ads, when in fact Prop. 2 simply was a means to try to end animal farming in that state."

The principle behind the measure is to provide all farm animals with room to "turn around freely, lie down, stand up and fully extend their limbs." It particularly deals with three types of confinement: veal crates, battery cages and sow gestation crates. Now that it has passed, it is set to become operative January 1, 2015.

Because there are few veal producers and the largest pork producer voluntarily eliminated gestation crates, the new law

affects the many egg farmers in the State of California. They believe the effects of the law's passage will negatively impact the egg industry forcing many to either leave the state or go out of business, in addition to increasing the cost of eggs.

A California egg farmer told the *Los Angeles Times* that he calculated it would cost approximately \$30 per bird to create new housing under the new law - too expensive

for his operation to handle. Another alternative egg farmers are considering is downsizing their operations, which in turn means laying-off valuable employees.

UEP says that because the wording of Proposition 2 is so vague, the state of California will have to determine how the new law will actually be implemented and enforced when it comes into effect six years from now. Until then, California's egg farmers will be busily adjusting to the confinement standards, leaving the state or shutting down. **LB**



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Dating site for those who relate to farm life



According to the last census, 21% of the American population lives in rural areas. With such a small percentage of people living in these areas, coupled with the type of lifestyle they lead, it is rather difficult for individuals here to meet new people. In 2005, Jerry Miller set out to solve that problem. The owner of the marketing and public relations firm for Alpaca Owners and Breeders Association launched FarmersOnly.com, a dating site welcoming ranchers, farmers, agriculture students, nature lovers, cowboys and girls and country folk, even wannabes. This farmer-specific match center boasts the slogan "City Folks Just Don't Get It!"

Profiling questions on this site are different from other dating services. Members are asked what kind of livestock they raise and crops they grow instead of what business industry they are employed in or what their astrological sign might be. Other criteria include whether one is an

organic farmer or student, as well as what type of tractor they might drive.

"Working 5 to 9, Monday through Sunday, and being out in the middle of nowhere — that combo is really something," says Miller.

With over 90,000 registered users, the niche market seems to be growing in popularity for not only farmers, but for all those able to relate to farm life. Farm-loving hearts looking for someone who understands what it means to work long farm hours can find others just like them here. Miller says engagements and marriages have transpired from the dating portal designed specifically for these sincere and down to earth people. One testimonial on the site says "I can't tell you how hard it is to date a guy who likes a woman who wants to shoot deer."

"The Online Dating and Friend Finder for Down to Earth Country Singles" has been featured on numerous news broadcasts including CNN, USA Today, FOX News as well as countless farm and agricultural magazines. As one blogger writes "Let the Farmer's Daughter Jokes Begin." 

"Members are asked what kind of livestock they raise and crops they grow instead of what business industry they are employed in or their astrological sign."



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According to the Institute of Medicine Food and Nutrition Board, the recommended intake of calcium varies by age and increases the older you get. 55 percent of men and 78 percent of women aged 20 and older are said not to meet their recommended intake for calcium. The suggested intake for ages 19 to 50 is 1000 milligrams a day. Children, on the other hand, do not need nearly as much due to the fact that their bones absorb 60 percent of their daily calcium intake. Adults' bones absorb only 15-20 percent. Vitamin D is said to help with the absorption of calcium, and smoking is said to decrease it.

Dairy products are the most abundant source of calcium. Yogurt tops the chart with 450 mg of calcium per serving. Some fish are very high in calcium as well. Salmon has 203 mg of calcium per three ounce serving. Tripe is another calcium-rich fish. Eggs contain only 29 mg of calcium, however, their shell is extremely calcium-rich. One medium-size eggshell has 750-800 mg. Eggshell calcium is the best source of natural calcium, and is often crushed and fed to animals.

Although meats are not overly abundant in

calcium, they still play a big role in calcium intake. Chicken contains anywhere from 19-23 mg per serving. Ham and other pork products contain 8-16 mg per serving while beef contains about 20-30 mg of calcium per serving.

Recently, scientists at Live Science have discovered that by measuring the electrical activity of nerves linking the brain and the tongue, mice are actually able to taste calcium. With this theory, scientists are looking into whether humans are able to do so also. It is said that calcium has a bitter, almost sour taste which might explain why people tend to stray away from calcium-rich foods.

A lack in calcium in older adults can result



in osteoporosis, an extremely painful disorder characterized by porous and weak bones. To prevent this from occurring it is essential to eat plenty of calcium-rich foods, take calcium supplements and see your doctor regularly. **UB**

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Where Beef Begins:

Q&A with Missourian Ben Eggers



Ben Eggers, manager of Sydenstricker Genetics

Contributed by
Certified Angus Beef's
Industry Information Specialist
Miranda Reiman

A few generations ago, cattlemen might not have considered themselves businessmen. Today, the daily considerations of feeding cows and fixing fence remain, but there's also a heightened awareness around rising input costs, beef demand and marketing.

Ben Eggers, manager of Sydenstricker Genetics, Mexico, Mo., has been with the purebred Angus operation for 26 years. Their primary customers are commercial cattlemen looking to buy Angus bulls, but Ben knows somewhere down the line the

buck stops with the consumer.

We caught up with the former American Angus Association president recently to see what life is like in his world right now.

Q: We know that your customers raise calves that go on to feedlots and packing plants across the country. What is your primary function as a seedstock producer and how do you fit into the supply chain?

A: We owe it to our customers to search for and develop new bloodlines, and refine those currently prevalent. That's why we try to produce bulls that can do everything fairly well, and at the end of the day sire calves that will have a high

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percentage meeting Certified Angus Beef® (CAB®) requirements. We try to breed the marbling and muscling in, but there are lots of other parts of it, too. The bull has to be sound, he has to be fertile and he has to leave behind good daughters.

Q: *Everything changes so quickly today. How do you ensure that you're keeping up and providing what your customers want?*

A: Our commercial producers will communicate with me in terms of how well their cattle are performing in the feedlot.

I see more of these guys giving me an idea of what kind of bull they want, instead of just saying, "I need a bull." To some extent, we try to produce a little variation to suit those people, but the more I hear ahead of time, the more I can shift the emphasis on our matings to produce the kind of cattle they're going to need in the future.

Q: *We hear about the economy, consumers' declining discretionary income and rising costs. With respect to all that, what's the top concern*

for producers?

A: Cost of inputs absolutely is number one right now. You've got the competition with ethanol plants for the corn and you've got increased fuel prices and increased fertilizer prices. Tractors, pickup trucks—everything is quite a bit higher. We're probably going to see some shrinking of the cattle herds. We're going to have to see better management and more utilization of forages prior to that calf going into the feedlot. We're going to have to watch a whole lot of things more closely.



"The Certified Angus Beef retail and restaurant licensees are trying to market a high-quality product and get a little more for that higher quality."

Q: *In every industry there are serious challenges and big question marks when we look to the future. Can you give us some positive news?*

A: Quality grades are up, which makes you think we're doing some things better genetically. We're doing some things better from a management point of view as well. I don't even want to get into the implant argument, but that is a debate that will probably continue. It would be hard to feed cattle in today's environment without using them, but the wise use and the correct use is darn sure important and a big differentiator.

Q: *Bottom line, what's the biggest similarity between yours and other segments of the beef industry?*

A: The Certified Angus Beef retail and restaurant licensees are trying to market a high-quality product and get a little more for that higher quality. We're doing the same thing; it's just that we're selling genetics and they're selling the ultimate result, the beef product. **LB**



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Chicago chocolatier and owner of Vosges Haut-Chocolat, Katrina Markoff, has combined two equally obsessive foods together in one perfectly balanced bit of savory, smokey, and sweet to produce bacon-flavored chocolate.

"There has been a real revolution in luxury chocolate, as there was with wine a few years ago."

"Bacon and chocolate sounds like a strange combination, but the execution is fantastic. It's a real explosion of flavors and people love it," said Ewan Venters, food and restaurant director of the UK department store Selfridges.

Markoff says she began experimenting with bacon and chocolate when she was just six years old while eating chocolate chip pancakes in syrup with bacon—one

of her breakfast favorites. Memories of the magical flavorings melding together and combining stayed with Markoff until she was able to express it in her own chocolate creations.

The bacon-flavored chocolate bar has proven a brilliant success. Most recently, Selfridges, the only department store in the UK which stocked the U.S.-made chocolate bar, reportedly sold out of its entire stock of several hundred bars within 48 hours, and placed an order for more



in the hopes of getting them for the Christmas season.

"There has been a real revolution in luxury chocolate, as there was with wine a few years ago. People are much more knowledgeable about it and there is a growing demand for these high-quality, exotic products," said Venters.

The extraordinary creation is called Mo's Chocolate Bar which brings together the flavors of applewood smoked bacon, alder wood smoked salt and deep milk chocolate. It is available in the U.S. from Vosges' Web site: www.vosgeschocolate.com. **US**



Centre of the Plate TrainingSM Plus

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Answers to the quiz on page 25:

1. E
2. FALSE. In the days gone by, Easter was, indeed, the biggest time of year for the sale of eggs; however, with so many substitutes (plastic colored eggs, foil-wrapped candy eggs, etc.) currently available, Easter's dominance has been supplanted by Thanksgiving, the holiday during which more baking (all recipes call for eggs) is done than any other. Additionally, since families traditionally travel to visit with one another, breakfasts (many of which contain eggs as a staple) are generally shared.
3. B
4. D
5. A
6. TRUE. The two principal factors which determine the size of an egg laid are ambient temperature and the length of time a hen has been "in service." When first placed in service, hens produce eggs beginning with small and progressing through medium, large, extra large, and (finally) jumbo. The prevailing ambient temperature can influence how long a hen produces eggs of a given size.
7. FALSE. Back in the mid-twentieth century, the production of eggs (like almost every foodstuff) was concentrated principally at local, family-run farms. However, since then, the industry evolved into what it is today: an oligopolistic collection of huge agri-firms, many of which have collections of more than a million egg producing hens, located in massive concentrations euphemistically referred to as "egg farms."
8. TRUE. In Walt Disney's Comics and Stories, issue #146, Donald and his nephews (Huey, Dewey and Louie) move to a bucolic setting to become egg farmers. Needless to say, the result is disastrous, and the town is renamed "Omelet."
9. B
10. FALSE. Egg-laying chickens are bred for the specific purpose of laying eggs. They do not find their way into the chicken section of the meat department at your local supermarket.

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Prepared foods

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shoppers don't know what they're going to eat two hours before dinner. It also showed a four percent increase from last year in the percent of people who are eating home-cooked meals at least three times a week. Many of those meals are not being made in the consumers' kitchens, but with convenience and prepared foods from the store.

Grocers have taken note of the popularity. According to a company press release, Stop & Shop and Giant-Landover supermarkets added more than 100 fresh prepared foods such as soups and bourbon chicken. Supervalu Inc. has

"When they (consumers) are trying to return to more meals at home, they don't want to start from scratch like we would a generation or two ago..."

also introduced a line of more than 150 items that aim to rival restaurant-quality food.

A new report from foodservice consultants Technomic, states that three out of five consumers (62 percent) who report purchasing more supermarket prepared meals than a year ago, are doing so at the expense of fast-food restaurants. Additionally, the survey found that family-style and casual-dining restaurants were also impacted to a somewhat lesser extent. Convenience was cited by 86 percent as the reason for buying more retailer meal solutions.

"When they are trying to return to more meals at home, they don't want to start from scratch like we would a generation or two ago," said Tim Hammonds in a recent *Associated Press* article. "That's why the prepared foods are so popular."

The ability to pick up a healthy, affordable dinner in one stop is appealing to the consumer. Making tough personal finance

choices, like whether to eat out versus the need to keep gas in the tank, has certainly benefited prepared foods. But with good taste, value and nutrition it may not be a trend that changes when the economy improves. **UB**

Michael Foods

Continued from page 1

language, labeling, documentation, and transportation requirements for a variety of specific situations. Their specialty Quality Assurance Team has worked hard to develop an innovative range of products.

Looking ahead, Michael Foods plans to carefully monitor the potential impact on volume the overall economic environment may trigger, especially as related to food services and away from home food consumption. **UB**



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