



McDonald's Egg White Delight McMuffin.

Raw costs and consumer trends drive the value of egg whites

Consumer trends are often the main driver behind research and development. There's no doubt they guide movements in apparel, automotives, and technology, and they are also important in the food and beverage industries. During the last few years, no two trends seem more important than convenience and health; areas which have driven innovation and buying patterns in egg products.

Quick service restaurants (QSRs) have taken full advantage of their ability to move the customer in and out, allowing them to grab a quick bite during their busy day. Some have struggled to catch on to the health movement however, and are often associated with the fact that Americans

“Upwards of \$7.00 per pound, whites shattered the previous record...”

possess one of the highest obesity rates in the world, second only recently to Mexico.

In the last two years QSRs have shifted some of their focus to healthier options. With 85% of breakfast consumed outside of the home in this channel, it was important for them to update their menus and target the health conscious customer.

Egg whites became the clear option when looking at breakfast proteins and have popped up on menus across the nation. Major shareholders of the breakfast pie like Dunkin' Donuts and Starbucks quickly added egg white offerings. Subway, Panera Bread and Burger King also followed suit. It wasn't until April of 2013 though that McDonald's, launched their egg white sandwich.

Suppliers of the company were forced to build inventory ahead of anticipated demand. At the same time of year when egg whites typically receive a boost from New Year's health and dietary trends,

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The jobs report may not tell the whole story...

UNEMPLOYMENT: should the protein industry be concerned?

As of July 2013, the United States' official unemployment rate dropped to 7.4 percent, down from the recessionary high of 10 percent hit in October of 2009. It's been a long road from the 2007-2008 crash and many look to this figure as one of the benchmarks for gauging recovery. However, as is occasionally mentioned in passing conversation among TV pundits, the unemployment rate rarely tells the full story. When we look through the eyes of the protein industry, where sales depend on the populous working and earning

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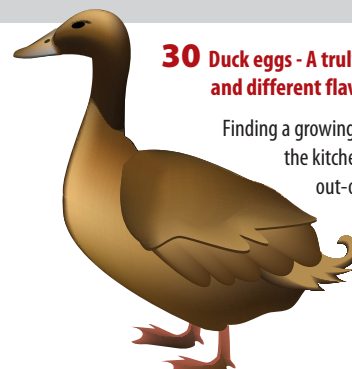
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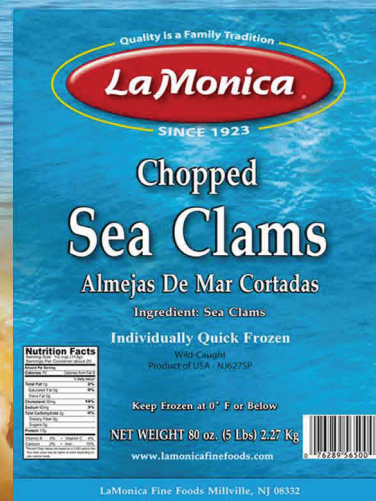
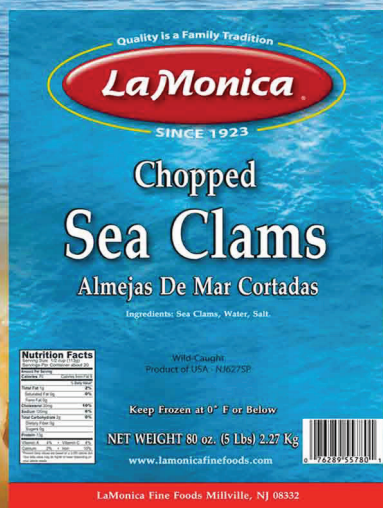
Finding a growing role in the kitchens of the out-of-the-box thinking chefs.



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Urner Barry's Reporter (ISSN 1944771X) is published quarterly by **Urner Barry Publications**, 182 Queens Boulevard, Bayville, NJ 08721. Periodicals Postage Paid at Bayville, NJ 08721 and additional offices. POSTMASTER: Send address changes to **Urner Barry's Reporter**, 182 Queens Boulevard, Bayville, NJ 08721.

Subscription to *Urner Barry's Reporter* is free. Mail subscription orders and changes to **Urner Barry's Reporter**, Subscription Department, 182 Queens Boulevard, Bayville, NJ 08721 or call 800-932-0617.

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Center of the plate

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Record beef prices kicked off the summer

There has been a lot written and discussed by the news media throughout the middle part of 2013 in regard to record high beef prices. You may have noticed the headlines or experienced the sticker shock in the check-out line of the grocery store.

The Urner Barry Choice Cutout, a composite of carcass cuts utilizing the present trading value of those items at the wholesale level, hit a record of \$2.068/lb just before Memorial Day on May 23, 2013. The Select Cutout at the same time was \$1.916/lb, just shy of \$1.951/lb, a record set in February 2012. Retailers passed the price increase onto consumers with elevated prices being paid at the retail level. There were a number of factors, some dating back to 2008 that contributed to the rise in prices that peaked right as demand does for the start of grilling season this year. Food and fuel prices rose sharply right before the recession hit, and packers culled herds in response. As beef demand increased following the recession, we saw a drought start in 2011 in the South and spread to most of the South and Midwest by 2012. The drought, combined with using corn for ethanol, forced feed prices higher again. There were further cutbacks, which left the United States with the smallest number of cattle in 62 years. This has been the perfect storm for prices which has not gone unnoticed and forced many consumers to search for alternate proteins when in the food store.

The Urner Barry Beef Index rose 37.09% from July 2009 through July 26, 2013. While beef is considerably higher on an absolute basis, it is worth looking at some of the other proteins that consumers are putting in their shopping carts on a relative basis. The Yellow Sheet Pork Carcass

“Where’s the beef? Maybe not on your grill this summer”

Cutout rose 61.12% during the same period, nearly 65% faster even while slightly falling back from record levels in 2011. Pork exports seem to be the driving force in prices. Export sales buoyed prices to those records in 2011, but fell as bans kept a lid on exports more recently.

Seafood is another option for the protein consumer, and one of the most popular items is shrimp. The UB White Shrimp Index has also hit record highs in 2013, with a gain of 64.49% during the comparative time period. The tight global supply due to EMS (early mortality syndrome) in Thailand was the largest contributing factor. As a result, buyers had to source product from other areas, pushing prices higher. Looking at eggs, the Urner Barry Egg Index gained nearly 46%; the pattern for the year was typical of past trends but prices edged higher as avian influenza in late April, early May increased buying

interest from Mexico. Now we turn our attention chicken. It seems that chicken and more specifically boneless, skinless chicken breasts has become a staple in everyone’s shopping cart. Retailers focused their activity on boneless/skinless breasts with ad features well above the five year average in 2013. This helped push the Urner Barry Chicken Index 22.33% higher from July 2009. Chicken benefited from reduced supplies and increased demand from Mexico as the country needed to fill its

needs as avian influenza hit the country. These figures all compare to a more subdued rise in CPI-Meats, Poultry, Fish, and Eggs Category. This basket of goods advanced 15.85% during this time (ending May 2013) as substitutions are allowed to

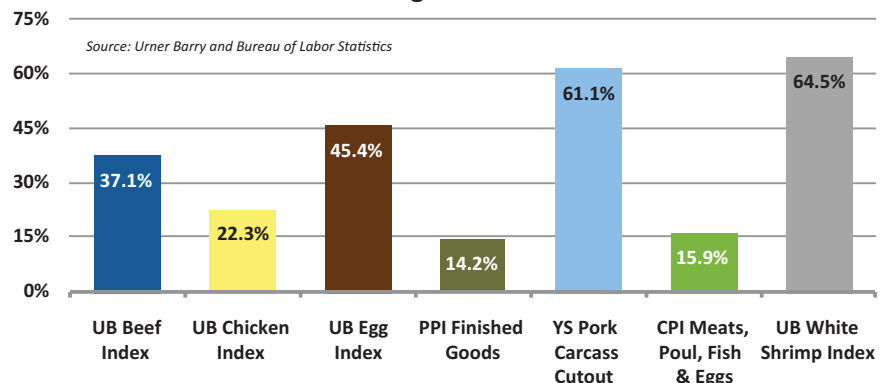
be made. The moral of the story is that there is more than one way to look at things. And like so many things, the headlines are there to grab your attention. Ask where the data comes from and what the story is trying to represent. It will help you make a more informed decision. But there still needs to be a choice when it comes down to \$40.00 worth of t-bones or \$12.00 worth of chicken. Maybe looking at it in absolute terms and by the headlines is really all that matters. **UB**

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“US beef prices set new high as spring barbeque season heats up”

“Beef prices hit record highs in time for the summer grilling season”

Percent Change 2009 - Current



BAP program reaches milestone, grows with addition of new farm standards

Contributed by Global Aquaculture Alliance

Third-party certification is becoming an integral part of doing business in the global seafood trade, and nowhere is this more evident than the Global Aquaculture Alliance's Best Aquaculture Practices (BAP) certification program.

The BAP program reached a milestone in July, surpassing the 600-facility mark. More than 600 processing plants, farms, feed mills and hatcheries are now BAP certified. That's a net increase of more than 100 facilities since Nov. 30, 2012, when 497 processing plants, farms, feed mills and hatcheries were BAP certified.

The combined annual output from BAP-certified salmon processing plants now exceeds 400,000 metric tons, and much of the growth within the BAP program over the past one to two years is attributed to Atlantic salmon.

In July, a number of salmon processing plants attained BAP certification, including Acuino Chile S.A. and Nova Austral S.A., both of which are divisions of the Pescanova Group, and Walcan Seafood, the exclusive processor of Skuna Bay Vancouver Island Craft Raised Salmon. With BAP certification of its processing plant, Marine Harvest Canada became British Columbia's first salmon company approved to offer three-star salmon.

Additionally, Albion Fisheries Ltd., Western Canada's largest seafood distributor, became the first full-line seafood distributor in Canada to earn BAP certification, for its 65,000-square-foot processing plant in British Columbia. And Belize Aquaculture Ltd. became the first shrimp company in Belize and the second in Central America approved to offer three-star shrimp, with BAP certification of its shrimp hatchery, farm and processing plant.

Further perpetuating growth, new farmed seafood species are being introduced to the

BAP program, thanks to the completion of the new BAP standards for finfish and crustacean farms in April. A number of farmed seafood species—including sea bass, sea bream, cobia, seriola, barramundi, trout, perch and carp—became eligible for BAP certification at the processing level once the new BAP farm standards were finished.

The new BAP multi-species farm standards apply to all types of production systems for finfish and crustaceans (excluding cage-raised salmon), replacing the previous BAP farm standards, which were separately tailored for shrimp, tilapia, *Pangasius* and catfish.

Pompano is also among the farmed seafood species now eligible for BAP certification. And, in July, Guangdong Gourmet Aquatic Products Co. Ltd.'s processing plant in



New Zealand King Salmon Co. became one of Australasia's first salmon-farming companies to attain Best Aquaculture Practices (BAP) certification in April. Photo courtesy of New Zealand King Salmon Co.

Wuchuan, Guangdong, China, earned BAP certification. With BAP certification, Guangdong Gourmet Aquatic Products is the first company approved to offer one-star pompano. The facility also processes shrimp and tilapia. **UB**

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Beef demand may vary with quality

Contributed by Certified Angus Beef
Steve Suther, Industry Information Director

The gap is widening between key indicators of demand for premium and commodity beef.

Non-branded USDA Choice beef saw eroding demand since its 2010 peak, as consumers apparently turned toward a premium branded alternative.

Details are in an updated research paper from Kansas State University (K-State),

“Defining and Quantifying Certified Angus Beef® (CAB®) Brand Consumer Demand, 2013 Revision.”

Pounds of CAB product sold increased every year since 2005, but it took economic modeling and research to see the demand effect.

K-State economist Ted Schroeder and 2010 Master’s student Lance Zimmerman conducted the initial study that year. Zimmerman took a break from his role as analyst with CattleFax to update

his college work with new data to characterize demand through 2012.

Methodology and results are explained in that research paper, available at <http://www.cabpartners.com/news/research.php>

That index provides a measure of demand change over time, and features a new timeline comparison (Figure 1). “Since CAB product is a branded subset of the USDA Choice-and-higher marketplace, demand for the aggregate quality category was expected to share more similarities than the non-branded USDA Choice index used in the 2010 research (Figure 2),” the paper says.

The results show three different demand growth patterns among the indexes. Demand for the aggregated Choice-and-higher grading product actually outpaced CAB from 2008 to 2010 before declining in 2011 and 2012, while CAB product continued its improvement. Demand growth for both categories was similar through the first nine years of the study.

“However, as much as the early growth patterns point to the similarities, the divergence of demand patterns most noticeable in the last two years of the study suggest there are perceived differences in CAB relative to its greater product category in the mind of consumers,” the paper says.

Demand eroded nearly 27 percentage points for Choice-and-higher beef in 2011 and 2012, while CAB demand increased 25 points.

“It is reasonable to assume that Figure 2 points to at least some of the demand differences seen lately between CAB and the Choice-and-higher product category. The graph shows demand for CAB has outpaced non-branded Choice consistently since 2009. Demand for CAB increased 79% over the 10 years, and Choice demand increased 3%, according to the updated paper.

The model results explain demand trends over time for each beef product as it relates to larger macroeconomic trends. Since



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Filet mignon with green beans.

each measure is based on wholesale demand, it includes sales to retailers, foodservice and international.

The CAB demand index had its largest year-over-year improvement in 2010 when demand improved 38 points reaching 154.8. That coincided with the 100-million-pound annual increase in sales and 13% increase in per capita consumption even as cutout values grew.

“Beef demand remains a concern in the post-recession environment. Consumer incomes have made relatively small improvements in recent years, and incomes are a key beef demand consideration,” the paper states. Since the 2009 recession lows, the CAB cutout value has improved 6.6% annually and per capita consumption improved each year as well. In the other categories, boxed beef values improved at the expense of per capita consumption. **UB**

Figure 1

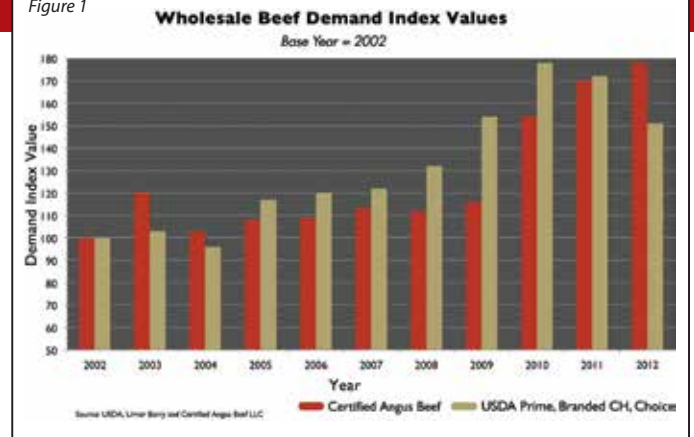
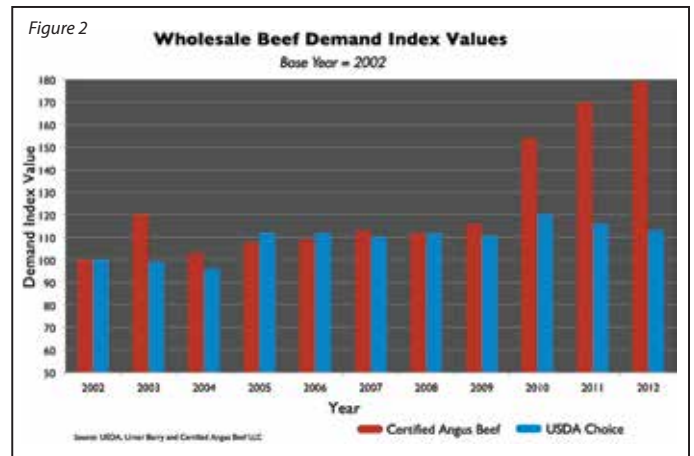


Figure 2



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Getting *Hooked* on NFI's newsletter

Contributed by Jennifer McGuire, MS, RD
National Fisheries Institute

The National Fisheries Institute (NFI) has developed a quarterly newsletter designed to keep chefs, retailers, and menu-planners "hooked" on fish and shellfish. The publication started as a suggestion from NFI's Communications Committee, a working group of marketing and public relations executives from seafood companies within NFI's membership.

"While consumers are an important audience to market to, it's the chefs who are on the front line when it comes to making sure seafood is on the menu in appealing ways," said Jim Walstrom, Chair of NFI's Communications Committee. "So we wanted to make sure they're excited about new offerings."

There have been five editions of *Hooked* released since summer 2012 with themes

ranging from fish on children's menus to serving comfort seafood. The newsletter provides the latest in seafood health and nutrition information among other trending seafood foodservice topics. *Hooked* is a quick read meant to spark ideas for new and innovative seafood selections on menus and every edition features an inspirational recipe.

In April of 2013, *Hooked* launched a recipe contest open to Johnson & Wales culinary students—the future gatekeepers when it comes to keeping fish on the menu. The submissions illustrated the many species, cooking methods, and flavors abundant in



seafood. The winning student was featured in the Summer 2013 edition with her original seafood recipe.

"More than half of commercial fish and shellfish is eaten outside of the home, so chefs play an integral role in helping people meet the recommendation to eat seafood twice a week," said Jennifer McGuire, a registered dietitian for NFI. SeafoodHealthFacts.com notes the role chefs' abilities to creatively prepare specials based on availability and demand plays in whether seafood is featured on the menu. "The *Hooked* newsletter provides chefs with inspiration to prepare up-to-the-minute seafood menu items and contains retail data trends to back up that decision," said McGuire.

Previously available exclusively to NFI members, distribution of *Hooked* has now been opened to the broad foodservice community, including culinary schools. "We received such great feedback from the NFI membership that we wanted to make sure everyone had access this resource," said Walstrom. To receive an electronic copy of *Hooked* on a seasonal basis, please email Lynsee Fowler at lfowler@nfi.org. **US**

"The newsletter provides the latest in seafood health and nutrition information among other trending seafood foodservice topics."



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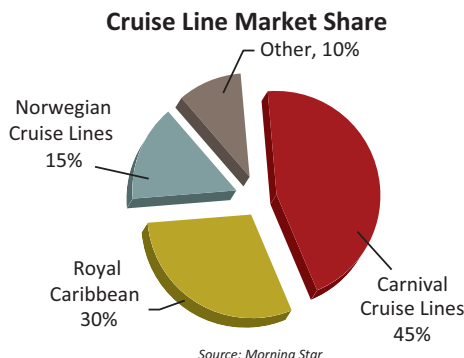
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The cruise industry and the trickle down to food production

Food costs seem to be on everyone's minds these days. How can it not be when many of Urner Barry's Indices hit record levels in recent years? If it's not on your mind, consider this: What if you had to source some of the following, week after week? 24,000 pounds of beef; 7,000 pounds of pork; 4,500 pounds of veal; 10,000 pounds of chicken; 3,000 pounds of turkey; 2,100 pounds of lobster; 14,000 pounds of fish; 9,000 dozen eggs; and that is just a start. This doesn't count all the fruits, vegetables, baking supplies and liquor. That's exactly what an average cruise ship provisions for a 7 day voyage for an average of 3,000 passengers (2,000 guests and 1,000 crew members). It's about the same as any small town across America would consume in a week.

Despite some headwinds that faced the leisure travel, and more specifically the cruise industry in recent years, things seem to be turning around. The Florida-Caribbean Cruise Association forecasts 20.97 million passengers in 2013 versus record 20.30 million in 2012, an increase of 2.5%. Cruising appears poised to be the fastest growing category in leisure travel.

2012 turned out to be a decent year for the cruise industry despite having to battle



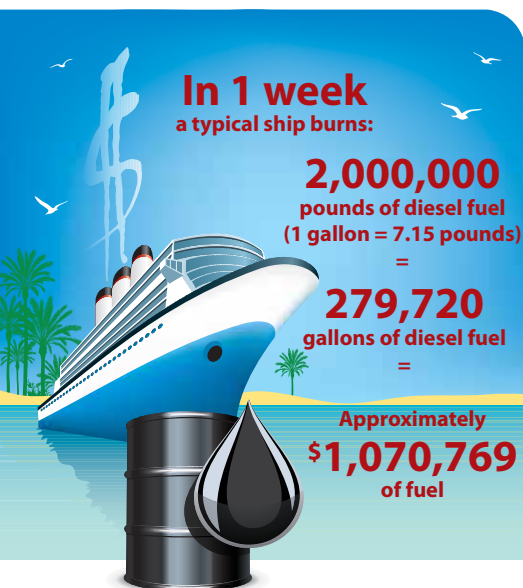
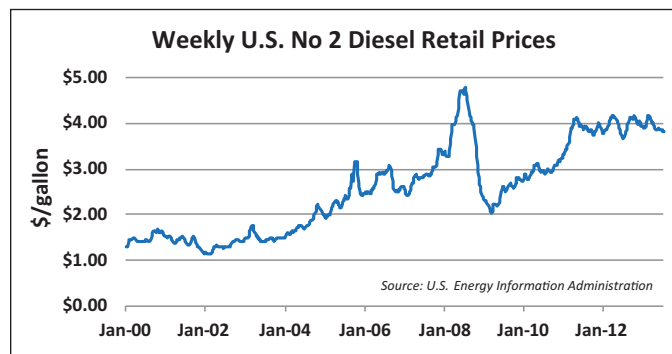
headline risk after high profile crashes and higher commodity prices—which remain the single largest factor for profitability for the industry despite hedging techniques. In addition, to start this year, consumers faced the expiration of the Bush-era Social Security tax cuts which reduced disposable income and therefore discretionary spending. There is also geopolitical risk in European and Mediterranean countries that could diminish interest in cruising to these regions. Some factors that look to favor the industry moving forward are that occupancy rates remain above 100%, so supply/demand fundamentals are in cruise lines' favor. Additionally, the shipbuilding rate remains below growth. If macroeconomic factors improve, delayed vacations over the past few years could help improve pricing.

To see how the turnaround is happening we can look at some of the most recent financial filings of the two of the largest cruise ship operators, Carnival Cruise Lines and Royal Caribbean. Carnival Cruise Lines (CCL) latest quarter ended May where they had revenue of \$3.479 billion slightly below Q1 of \$3.593 billion. While revenue numbers were down slightly from 2012, they are above 2011. Because CCL has its fiscal year different

than calendar year, the two best quarters should be coming up. And while top line numbers were down, earnings per share remained positive for the two quarters starting 2013. Royal Caribbean's (RCL) first quarter revenue of \$1.911 billion was better than expected as the company noted better bookings and revenue per available passenger at the highest level since 2000. With costs less than expected as well, earnings per share for the first quarter came in at \$0.35/share, above the \$0.21/share for the same period last year.

So while there remains to be some risks, the cruise industry appears to be starting to turn. For the food industry, the implications are positive if this happens, as you can see from the list of items needed just to provide for the passengers. **UB**

Article contributed by Gary Morrison
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Dinner is—*printed*?

We've all had those days when we're so hungry but don't feel like cooking; well imagine selecting an entrée and then pressing a button and watching your meal manifest itself from an electronic printer. Sounds like something from a futuristic Sci-Fi flick, right? Think again—the next big thing in food innovation is coming soon to a printer near you. NASA has announced its intent to fund the world's first 3D food printer.

How it works: the 3D food printer is basically automated food creation. According to the May 21st, 2013 article published by Fox News upon NASA's announcement of the grant offering, the printer uses cartridges, similar to the ink ones you use in your standard printer, filled with oils and powders that make up food components and include all the essential nutrients required for a healthy diet. The ingredients are sprayed on layer-



by-layer, eventually creating solid three-dimensional food.

The man behind the madness is mechanical engineer Anjan Contractor. He has designed the 3D printer and will be utilizing the \$125,000 grant for the construction of the machine. There is the hope that the printer will be utilized as a method to provide food for astronauts throughout their expeditions in space.

Now, what implications does this have for the future of the food industry? There is an ever present fear among economists and the general populous of the future state of our global food supply. Perceivably, this invention could eventually change the face of world food production. Imagine this contraption being a staple in every household kitchen. World hunger may be a problem long forgotten. Plus, the sell by date for these cartridges is about 30 years according to an interview with Contractor in Quartz magazine, so we're looking at what could be a significant reduction in food waste and want.

Does that mean there will be no use for grocery stores in the future? There's no need for the meat industry to panic just yet. The first item that Contractor plans to create with the machine will be a pizza—the dough being printed first followed by a layer of tomato and what's being referred to as a non-descript "protein layer" as first reported by Quartz. Still, we have no idea at this point what the cost of the powdered ingredients will be to produce, manufacture or the final purchase price of the finished product.

It will most likely be a while before we see any significant changes in the industry as a result of the 3D food printer. However, preliminary indications suggest that we can expect positive results from this innovation as it is expected to someday contribute to the overall perception and utilization of food. **UB**

Article contributed by Jamie Chadwick
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"...this invention could eventually change the face of world food production."



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Characteristically crunchy turkey croquettes

Croquettes of any kind conjure up images of home cooking and rich goodness. These spherical or sometimes cylindrical foods can be made from a variety of ingredients including beef, veal, chicken, seafood, cheese and vegetables in any number of combinations. Bread crumbed and fried, and often laden generously with gravy, the croquette is an international “delicacy” with French roots. The name comes from the French verb *croquer*, meaning “to crunch.”

In *Urnery Barry Reporter's* version of croquettes, we decided to take a stab at a less traditional, but extremely tasty, version by utilizing white and dark meat turkey. While it's true that turkey and the summer months are typically associated with cold cuts and deli sandwiches, turkey croquettes are a tasty treat and a perfect rainy, summer day recipe. Turkey is great to use because its high protein, low fat makeup helps offset some of the negative connotations linked with the butter, oil, potatoes and frying. In the absence of leftovers, summertime chefs may choose to cook a bone-in breast and some turkey thighs or drumsticks and then pick that wonderful meat to the bone for a deliciously balanced white and dark meat croquette feast! **UB**

Introduction written by Russell W. Whitman
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Recipe prepared by Rusty Dean
Rusty@urnerbarry.com

TURKEY CROQUETTES

INGREDIENTS:

2 tablespoons vegetable or any light colored oil, plus some for frying
1 stalk celery, finely chopped
1 small onion
1 carrot, peeled and finely chopped
¼ cup chopped parsley
1 pound leftover or cooked turkey
1 ½ cups mashed potatoes
1 ½ cups plain bread crumbs, divided
1 teaspoon poultry seasoning
salt & pepper to taste
1 egg beaten
¼ cup heavy cream
Chicken broth (optional)
cranberry sauce

Gravy:

2-3 tablespoons butter
2-3 tablespoons flour
2 cups chicken broth

Heat 2 tablespoons of oil over medium high heat. Add the celery, onion, carrot and parsley and cook until softened, about 5 minutes. Let cool slightly.

In a mixing bowl, shred the turkey using two forks. Add the mashed potatoes, ½ cup bread crumbs, poultry seasoning, salt, pepper, egg, heavy cream and cooled veggies. Mix to combine and form 10 patties in the remaining bread crumbs. Heat ¼ inch of oil in a medium skillet with high sides over medium-high heat. Brown the patties in two batches in a single layer in the hot oil for two minutes each side or until golden brown. Drain on paper towels and transfer to a serving plate. Serve with cranberry sauce and gravy. If mixture is dry you can add some chicken broth to moisten and flavor.

Gravy: In the same skillet used for patties, add 2-3 tablespoons butter and 2-3 tablespoons flour. Combine well over medium heat making a roux; this will take about two minutes. Whisk in 2 cups of chicken stock or broth, stirring until it thickens. Add salt and pepper to taste.



Louisiana's seafood branding

After 13 years at the helm of the Louisiana Seafood Promotion and Marketing Board former executive director Ewell Smith departed the Board with Louisiana's embattled seafood brand looking at a bright future.

Upon his departure Smith was proud to see the Louisiana seafood brand take hold beyond its native Gulf heritage as the Board's recent marketing efforts have changed consumer sentiment of the Gulf's seafood offerings. Smith said promotional efforts have rebuilt consumer interest in the Bayou's seafood to dinner plates nationwide—a daunting feat considering the challenges the Gulf industry has had to face in recent years.

"Little did I know when the Chairman hired me would there be five major hurricanes and an oil spill to lead though," Smith said. "I am very proud of the work



our team has done to serve our fishing communities over the years; putting the brand of Louisiana Seafood in the national spotlight."

One such movement in 2013 has been the Board's "Certified Louisiana Seafood" campaign that puts a logo on Louisiana's domestic seafood branded products that pass a rigorous traceability program. Smith said the branding effort is part of a greater consumer movement to eat seafood products they know are fished in Louisiana's waters.

"The trend is absolutely going to buying local; people want to buy products within the radius of their hometown," Smith said.

Since the 2010 BP oil spill, the Louisiana Seafood Promotion and Marketing Board has taken a number of strategies to get the word out to seafood consumers that the state's seafood is as good as ever. For Ewell, he says they reached a turning point in May at the 2013 National Restaurant Association Show in Chicago.

"The NRA show was really important," he said. "We turned the corner; it's the first time in three years since the oil spill that

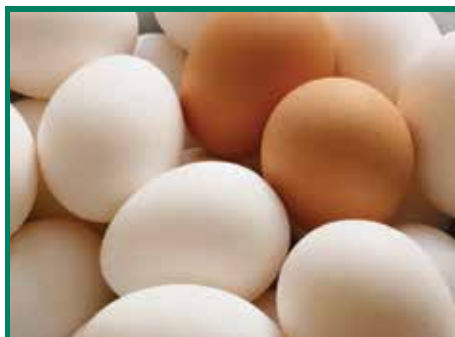
we did not have one single question asked about it."

And with BP increasingly becoming a fading memory, under Smith's leadership the Board employed a two-pronged marketing strategy: "Demand it" for in-state consumers and "Where flavor comes to life." Smith said targeting both consumers and foodservice professionals in Louisiana and beyond is the key to promoting increased awareness.

"The marketing in the state is very important," he said. "The people who are your best ambassadors and most proud of your product are the people who are from the area."

Meanwhile, Smith said the Board will continue to travel to foodservice shows throughout the country to promote Louisiana seafood.

For example the Board is expected to capitalize on its newfound position under the state's tourism department to build the Louisiana brand at the U.S. Travel Association's ESTO conference where the Board will work alongside traveling professionals to teach them about the



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Louisiana Seafood Board leaders and award-winning chefs made a 30-foot po'boy with Louisiana shrimp and oysters for the White House. Photo: Louisiana Seafood News

'turns the corner' in 2013

quality and strength of the Louisiana seafood brand.

"What this is going to do for the Board is expose it to a whole other industry to understand better how to bring the Board's message to the national audience." **UB**

Article contributed by Michael Ramsingh
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In the face of the worst possible calamity to ever face Louisiana's seafood industry and fishermen, throngs of people gathered for the Louisiana Seafood Festival. Photo: Louisiana Seafood News

At times, Douglas Olander of Big D Seafood near New Iberia, LA feels he has made a living from the Rodney Dangerfield of the fish world. Over the years, the Louisiana black drum has gotten no respect. Photo: Ed Lallo/Louisiana Seafood News

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Top U.S. burger chains in satisfying customers

Adapted from a story which originally appeared on Foodmarket.com on August 23, 2013



Empathica Inc., a leading global provider of Customer Experience Management (CEM) solutions to the world's most respected multi-unit enterprises, recently released burger brand findings from the 2013 Quick Service Restaurant (QSR) Benchmark Study, which surveyed 10,000 US

consumers and determined brand rankings in categories such as food, staff and atmosphere, as well as the drivers behind social media engagement and loyalty.

American burger brand guests were asked to rate their recent visit to a burger chain on a number of factors, and a “percent delighted” score was calculated by averaging ratings of overall satisfaction, likelihood of revisiting, value for money paid and likelihood of recommending. The Benchmark then ranked America's

top QSR burger brands from highest percent delighted to lowest.

Findings show that the top three burger brands by sales—McDonald's, Burger King and Wendy's—are ranked at or near the bottom of guest satisfaction in almost all categories including food, staff, menu and atmosphere. These results demonstrate that a high number of locations and visits do not necessarily lead to high customer satisfaction—a key driver in customer loyalty.

“Our findings reveal that the top drivers of burger chain visits include speed, price and menu followed by portion, staff and promotion,” said Dr. Gary Edwards, chief customer officer, Empathica. “However,

“Our findings reveal that the top drivers of burger chain visits include speed, price and menu...”

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these are not the same drivers of customer satisfaction. The ultimate goal for location managers is to keep their guests coming back. Most QSR burger brands are delivering a good product to guests, but this is table stakes in driving customer delight. To achieve this goal, burger QSRs must provide a continually exceptional experience in addition to a great-tasting, quickly served food item. Conversely, the smaller specialty burger chains like In-N-Out Burger, Five Guys and Whataburger do a consistent job on both product and service quality."

AMERICANS RANK TOP FACTORS IN BURGER CHAIN PREFERENCE

Benchmark results show factors important to Americans when selecting a burger QSR for dine-in, take-out and drive-thru experiences. Food taste was the top factor in each dining experience category, while menu variety was least important when making a burger chain choice. Americans continually cite "felt valued" and "attentive staff" as important factors when making their burger chain selection. Guests rely

on previous experiences when selecting a burger QSR, whether they select a dine-in, take-out or drive-thru option.

"Interestingly, several brands are really failing to deliver what customers expect across occasions. It is critical that brands deliver a high quality, consistent experience regardless of whether the guest comes into a location in Dallas for lunch or a late night snack in Des Moines," said Edwards. "We know that customer loyalty is the sum of all their experiences with the brand, so consistency really is king—customers have to know what they are getting, regardless of location or occasion."

"The burger chain Benchmark results are consistent with what Empathica has found in our overall QSR findings," said Edwards. "It's clear that location number and size do not equate with high customer satisfaction. National burger chains need to focus on improving the little things that make a guest's experience exceptional, as well as making it seamless throughout the time of day or occasion choice." **UB**

America's Favorite Burger Brands

Rank	Brand	% Delighted
1	IN-N-OUT	66%
2	FIVE GUYS Specialty Burgers and Fries	57%
3	Wendy's	49%
4	Subway	48%
5	Chick-fil-A	46%
6	SONIC Drive-Ins	43%
7	DO	40%
8	Jack-in-the-Box	36%
9	Crabapple	35%
10	Hardee's Wendy's	34%
11	McDonald's	32%
12	Checkers Rally's	30%
13	Burger King	29%

empathica

Source: Empathica 2013 Quick Service Restaurant (QSR) Benchmark Study
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Technomic: latest poultry consumer trend report

While poultry, particularly chicken, is well-represented on restaurant menus, many diners are hungry for change. Data compiled by Technomic shows that more than half of consumers (55 percent) want restaurants to offer a greater variety of chicken entrées, and 40 percent of consumers want to see more options for turkey entrées on the menu.

“Escalating prices for beef and pork are nudging more consumers toward poultry,” says Darren Tristano, Vice President of Technomic. “Operators and suppliers can leverage shifting expectations by exploring a wider range of

versatility for chicken and poultry. These proteins are both highly adaptable to flavor innovation; look for opportunities to promote more poultry for breakfast, appetizers and snacks.”

To help foodservice executives understand the latest consumer behaviors, preferences and attitudes regarding chicken and poultry menu options, Technomic has updated its Center of the Plate: Poultry Consumer Trend Report. Interesting findings include:

- Poultry is trending up for breakfast, snacks and appetizers. In particular,

breakfast entrées featuring chicken are up by 16 percent on Top 500 full-service restaurant menus since 2011.

- In addition to breakfast, poultry is also a viable alternative to beef and pork for lunch and dinner. Three out of 10 consumers say they’d order chicken- and turkey-based substitutes for beef or pork menued during these dayparts.
- Consumers see room for turkey to expand on the menu: Nearly half of turkey consumers (46 percent) agree that most chicken dishes would taste just as good made with turkey. **UB**

Spotlight on Poultry



89% of consumers eat chicken at least occasionally



54% of consumers eat turkey at least occasionally

Base: 1,861 consumers aged 18+

Leading Flavors (Top 500 Limited- & Full-Service Restaurants)

For Chicken:



1. Garlic 2. Spicy 3. Barbecue 4. Teriyaki 5. Lemon

For Turkey:



1. Cranberry 2. Savory 3. Barbecue 4. Chipotle 5. Orange

Base: 687 chicken dishes on 251 LSR menus and 931 chicken dishes on 247 FSR menus; 53 turkey dishes on 498 LSR and FSR menus

Health Factors

% saying ‘Poultry described as _____ is...’ slightly or much more healthy

Fresh..... 77%
Naturally raised..75%
Natural..... 74%
Organic.....71%
Premium54%
Local46%

Base: Approximately 675 consumers aged 18+

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Forsman Farms...

...keeping up to industry challenges

Egg production in the United States used to consist of many small scale, family-owned farms scattered across the country. In the last few decades, however, many of these businesses consolidated and companies have grown larger and fewer in number. In fact, today, thus far in 2013, the top four egg producing companies account for more than 30% of total U.S. egg production.

Trends in the egg business are not unlike that of any other. Major retailers, for instance, are dominated by the top four in their respective industry as well. In 2011, 37.3% of sales were done by the four majors.

The egg industry continues to evolve, and with that new obstacles arise that make

owners wonder, is it really worth pursuing anymore? Reinvestment in facilities, willingness of the next generation to take on the business and the aforementioned competition for sales all come into play.

One company that has not only taken on these challenges, but has done so proactively is Forsman Farms in Cokato, Minnesota, an hour's drive west of Minneapolis.

From 1918 to the present, four generations of Forsmans have run the farm. The business began with Albert Forsman farming 120 acres and selling chicks from his flock. Fifty-five years later, Albert's son Norman took over the family farm and with 1,300 chickens decided to sell eggs to local vendors and restaurants. In 1974, his son Gary took over operations of the facility. Over the next twenty-five years, Gary and his wife Debbie farmed the land, and managed the flock of 60,000 chickens. More recently, while Gary and his wife Debbie oversee operations, their children, Peter and Dave, handle day-to-day duties.

The new generation of Forsmans have tackled industry challenges head on, producing eggs which are both SQF and UEP certified. They have also been proactive in updating portions of their facility to enriched cages in an effort to stay ahead of the curve. When Urner Barry visited the farm in March, we saw firsthand the family nature of the farm and the attention they put into their day to day business.

The facility currently operates with less than one million birds or roughly 0.35% of the total U.S. production.



Peter Forsman (above) along with his brother Dave represent the fourth generation of Forsmans to run the farm.

Nonetheless, the company has been forward in their approach, updating their grading systems and adding robotics to increase efficiency and speed. They have also refurbished their barns, testing enriched cage production with a percentage of their flock. "Like many companies in the industry we moved birds (around 1,500) into enriched cages to see how the housing system affected production and animal welfare," said Peter Forsman. When asked why he felt this kind of initiative was necessary, he responded, "Any company needs to be responsive to changing conditions in the marketplace. The regulatory environment and customer expectations are shifting. We believed it made sense to take the proactive step to learn how the birds live and behave in this environment. By understanding the nuances of the housing system we will be better able to meet the need of our customers."

At any rate the company has shown its ability to adapt to the changing environment, maintaining current business and competing for new accounts. While others have succumb to the changing of the tide with little resistance, the Forsman Family farm has met these challenges head on while still maintaining the core values passed down from generation to generation. **UB**

Article contributed by Brian Moscogiuri
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Help the National Museum of American History preserve agricultural heritage

A new exhibition displaying innovation in American agriculture is coming to Washington and can only get better with contributions by those directly associated with it and who continue to feed the world today.



With the Agriculture Innovation and Heritage Archive, the Smithsonian's National Museum of American History is asking the public to help preserve the innovations and experiences of farming and ranching across the United States.

Visitors can share their stories about the technologies and innovations that have changed agricultural work, as well as how these changes have affected their communities. The museum hopes to build a comprehensive digital archive of modern agriculture through user-submitted personal stories, photos, and other ephemera for an 8,000-square-foot exhibition that it plans to open in 2015.


Of strong focus in the archive will be personal stories. Stories accepted into the archive website will explore the impact of

agricultural innovation on individuals and communities. However, stories that promote a particular product, service, or business will not be accepted.

Smithsonian
National Museum of American History
Kenneth E. Behring Center

Items will be weaved together to show how agriculture has become more efficient and sustainable over time. According to the website, the exhibit will also explore the impact the agriculture industry has on rural communities, finance, science and retail.

This online archive depends on your support. All accepted submissions will be preserved and made publicly available on the archive's website, creating a new database for students, researchers, and scholars.

To find out more on how to participate please visit <http://americanhistory.si.edu/agheritage> 

Article contributed by Linda Lindner
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U.S. shell eggs continue to cross the border

The last 12 months have been a volatile period for prices in the shell egg arena. Not only were they affected by cyclical supply and demand factors, but unexpected, outside occurrences also played significant roles in the U.S. market.

It was just more than a year ago that Mexico's number one egg producing state of Jalisco was stricken with a strain of avian influenza. News slowly spread that 1-2 million, then 8-10 million, and eventually a total of 22-24 million layers had to be slaughtered in order to stop its spread. Exports to Mexico surged in the fall as a result, and U.S. egg prices raced more than 30% unexpectedly in the month of September.

The problem seemed to quiet thereafter, even though many U.S. traders believe exports would continue at this pace through the end of the year. As the calendar turned over to 2013, a number



of players were sending private loads on a weekly basis across the border, but overall volumes tailed. Reports suggested that the problem had been contained and that birds had been repopulated. Industry professionals felt this was an unlikely scenario considering the short time frame. They instead suggested that heightened domestic prices around the holidays were the cause of reduced export movement.

In early April, the issue resurfaced when undisclosed number birds were once again affected by the virus and removed. Private inquiries for product surged and the United States Egg Marketers (USEM) also put together several deals for its members to ship product down south.

Hundreds of loads were contracted to go across the border from mid April to mid May. Urner Barry's large quotations rose from an adjusted post-Easter level of \$0.98 per dozen to \$1.38 per dozen Midwest.

These levels exceeded the previous five year average of the same period by more than \$0.24 per dozen or 20.2%.

According to the USDA FAS, exports of fresh US shell eggs to Mexico in the period from January to May of 2012 totaled \$391,000. In the same period during 2013, \$24,486,000 worth of shell eggs crossed the border, a more than 6,000% increase.

Contracted loads delivered through the next three months before finally wrapping up in late July. Private transactions continued to be done during this period but overall volumes began to slow here as well once again.

The total dollar amount of U.S. shell eggs going into Mexico for the first half of the year has already exceeded the total in 2012 by more than 7 million dollars. Traders down south are once again showing interest in product as we head toward fall, a period where consumption increases due to cooling temperatures and the start of the school season, similar to what we see in the domestic environment.

Mexican trading partners and consumers alike have been price sensitive in their buying patterns. The country is the number one per capita consumer of eggs however, and if the issue persists, the states will likely be a natural source and trading partner of eggs through the rest of the year. **UB**

Article contributed by Brian Moscogiuri
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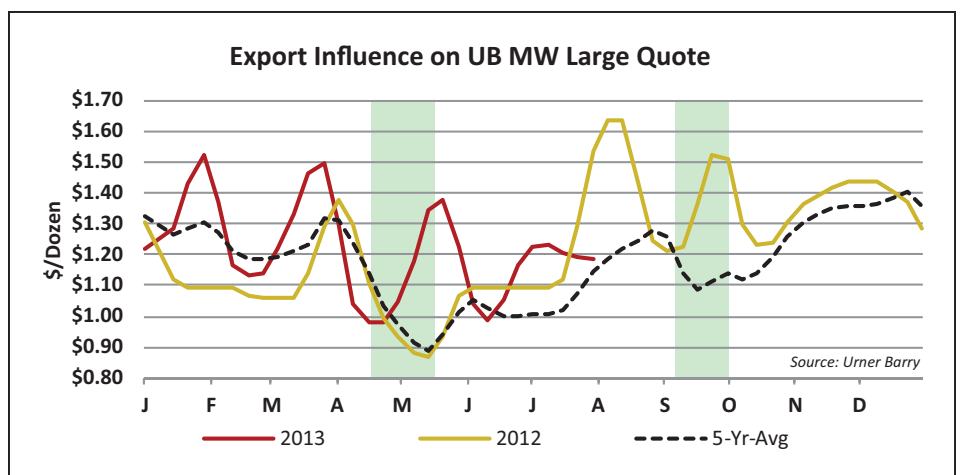
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Turkey's time to shine

There's a new trend developing in the food industry—the grand induction of the turkey burger as a staple on restaurant menus.

Burger King is the latest fast food giant that has added the turkey burger to its bill of fare. Hardees and Carl's Jr. previously offered the sandwich as a limited time offer, and have since continued as a steadfast menu item at their locations.

Turkey burgers may seem like a relatively new entrée, and while the exact history of the item is debated, research

“...recently we've been seeing an uptick in dining establishments carrying the dish.”

suggests restaurants offered the sandwich as early as 1938. The makeup of a turkey burger consists of whole muscle material from the drumstick, thighs, wing, neck and other areas of the bird where meat and fat are in natural proportions.

Ground turkey has become increasingly popular in the last decade, especially for home cooked dinners. It's easy to prepare, and can be used in place of traditional beef in many recipes like turkey meatballs and turkey tacos. However, recently we've been seeing an uptick in dining establishments carrying the dish.

At present, obesity awareness may be the single most powerful proponent prompting menu change in America. To the health-conscious diner, the turkey burger seems like a healthy alternative to a traditional burger as it's slightly lower in calories and cholesterol. Additionally beef, in recent years, has regrettably adopted an unwanted and often unwarranted stigma of its health benefits in the eyes of consumers.

According to the National Turkey Federation, overall turkey consumption has nearly doubled over the past 25 years. In 2011, per capita turkey consumption was 16.1 pounds compared to 8.3 pounds in 1975. According to our research, both spring and fall seem to be the two most popular seasons where we see specifically ground turkey featured at the retail level each year.

With the growing popularity we've seen from this item in recent years, we can expect to see it popping up on menus all over the country at restaurants both big and small. **UB**

Article submitted by Jamie Chadwick
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How BEEF can COMPETE

“Beef struggled with health perception issues, convenience woes and the challenge of being the most expensive protein in the meat case.”

Article contributed by Miranda Reiman,
CAB Industry Information

Eleven to one—those were the odds the beef industry was up against for two decades.

“We got \$10 in new spending over that 20 years, meanwhile our pork and poultry competitors got \$110,” says Nevil Speer, an animal scientist at Western Kentucky

University. “You can’t grow an industry without new revenue coming in.”

Beef struggled with health perception issues, convenience woes and the challenge of being the most expensive protein in the meat case, he said.

Then, the independent sector orientation began to adjust for mutual good.

“We began to understand that we need to work together in this industry,” Speer says.

That lent itself to more branded programs and supply-chain alliances.

“Today we’re averaging somewhere around 12% to 15% branded sales on a weekly basis,” he says “This push will probably continue in the years ahead.”

As a result, grid and other negotiated sales—where producers are paid more on how the carcasses perform rather than the animals’ looks—make up 75% of all fed-cattle marketings today.

Part of that also comes from increased competition for feeder cattle, and the need to recoup premiums paid on cattle coming into the feedyards.

“If we can find cattle that meet some end-user specification and then match our inputs and do that securely, we begin to kind of distance ourselves from the rivalry of fighting it out in a commodity market,” Speer says.

That’s happening on all sides of the beef business.

An estimated two-thirds of retail marketings are “out front sales,” he says. “They’re not spot sales.”

“What’s happening is that we are continuing to have more need for



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Nevil Speer, animal scientist at Western Kentucky University.

efficiency of movement, precision, to meet consumer needs,” Speer says. “We need the right cattle, the right products, at the right time and the right place, and that’s ultimately because we want to offer high-quality, highly competitive products with consistent, predictable turnover.”

That’s especially important as beef looks to compete with much cheaper alternatives. This spring, beef was running at 240% the price of chicken and 140% that of pork.

“We’re on the upper edge of where we’ve ever been,” Speer says. “At what point do consumers begin to push back? I don’t know; they’ve shown amazing resilience and continue to do so, but this is a concern.”

“Certainly, higher price equals higher expectations,” he says.

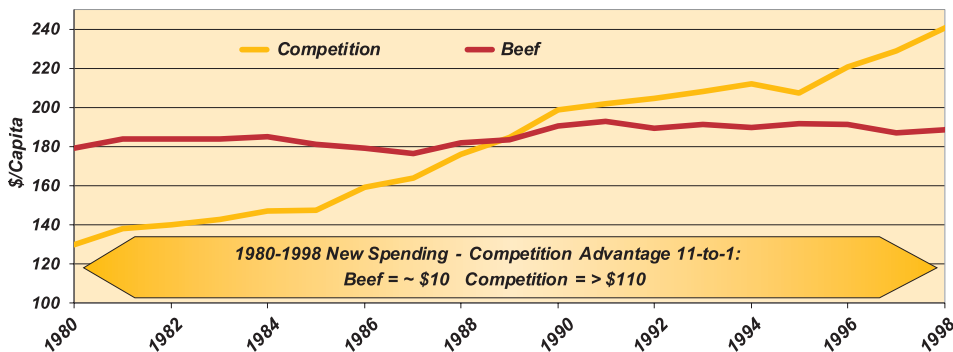
To those who say at some point the industry will have too much Prime or Choice beef, Speer counters: “If we can over-deliver that in an efficient way, and be more price-competitive with a quality product, I say let’s go. That means more opportunities in the beef industry.”

The National Beef Quality Audits, along with numerous other studies, show that meeting consumer demand sets the industry up for success.

“We have pretty good evidence that as we increase cooperation and responsiveness to consumers, we do a much better job in this industry,” he says. **UB**

Per Capita Meat Expenditures: 1980-1998 - Beef vs. Pork/Poultry Combined

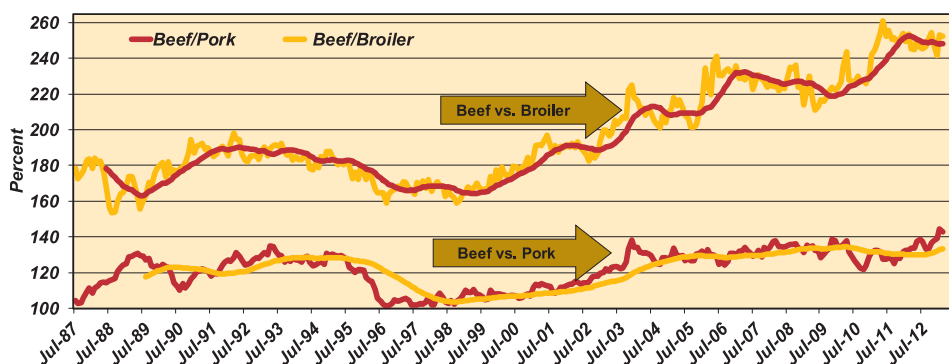
Adapted from USDA:ERS



Relative Monthly Retail Prices: Beef vs. Pork/Poultry (%)

Trendline: 12-month Moving Average (Through Feb., 2013)

Adapted from USDA:ERS



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Promoting eggs as the preferred

By Joanne C. Ivy, CAE
President & CEO, American Egg Board

For the 2013 Back-to-School PR campaign, the American Egg Board (AEB) leveraged its recent survey of 1,000 parents with school-aged children that investigated the importance of breakfast on busy school days.

The results emphasized the critical role breakfast and, in particular, eggs play in helping kids perform their best. In fact, 82 percent of parents surveyed agree that eggs are a more nutritious breakfast than cereal.



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The attention-grabbing headline resonated with the media across the country. Key survey findings include:

- **Don't Miss Breakfast:** Three-quarters of parents agree that breakfast is essential—38 percent serve breakfast to their kids before school because they believe it is the most important meal of the day, while 36 percent serve breakfast because it helps their kids focus in school.
- **Eggs Win In Nutrition:** Eight out of ten parents (82 percent) agree eggs are a more nutritious breakfast than cereal because the protein in eggs keeps kids fuller, longer.
- **Eggs Pair Up With Important Days:** Seven out of ten parents (71 percent) feed their kids eggs for breakfast on important days like the first day of school, test days or athletic events, compared to 26 percent who feed their kids cereal or breakfast bars on those days.
- **Protein Powerhouse:** Eight out of ten parents (84 percent) say eggs are the most high-quality protein breakfast to serve to kids.
- **Scrambling in the Morning:** When it comes to egg preparation, seven out of ten parents (71 percent) say scrambled eggs are their kids' favorite way to eat eggs.
- **Kids' Choice:** In many households, kids get a say in what's for breakfast, with half of parents letting their kids choose breakfast between the age of five and nine years old.

This press kit also included delicious, kid-friendly recipes, which have garnered the most attention to date. All parents need is five ingredients to create five different egg breakfasts that satisfy the taste buds of every kid in the family! AEB

reminded parents these recipes create the opportunity to save a little money on breakfast, since eggs are approximately 16 cents apiece. The recipes featured included:

- 1-Minute Sausage & Cheese Omelet
- Egg, Sausage & Cheddar Breakfast Bowl
- Egg, Sausage & Cheddar Breakfast Puzzle Sandwich
- Microwave Breakfast Flatbread Pizza
- Microwave Egg & Sausage Breakfast Taco

LEVERAGING THE RESEARCH

AEB also spotlighted a recent study conducted at the University of Missouri that found that teenagers who consumed breakfast meals that included protein-rich eggs and beef (35 g of protein) reported greater feelings of fullness compared to those who ate a cereal-based breakfast (13 g of protein) in its outreach. The egg breakfast also led to significant improvements in daily hunger and satiety hormone levels, reduced food cravings prior to dinner and resulted in eating less high-fat evening snacks.

Additionally, a study published in the *International Journal of Obesity* found that egg-eaters consumed an average of 330 fewer calories throughout the day than bagel eaters. One of the Egg Nutrition Center's (ENC) Health Professional Advisors was quoted in the release.

"When parents ask me what's an ideal breakfast for their kids, I recommend pairing protein-rich eggs with whole grains, fruits and vegetables," says Serena Ball, MS, RD, and mother of four young

Egg, Sausage & Cheddar Breakfast Puzzle Sandwich.



back-to-school breakfast choice



1-Minute Sausage & Cheese Omelet.

kids. “Protein is an important component of a healthy diet, and eggs are higher in protein than most cereals or many other breakfast foods, so you can feel good about feeding eggs to your kids in a variety of delicious ways.”

This campaign highlights the importance of the AEB/ENC’s investment in research. Once published, these studies become incredible assets in promotional efforts. ENC works hard to stock its “research pipeline” with studies that align with its core research pillars: cholesterol (and lipoproteins); protein (at breakfast); egg nutrients (choline); and health implications (diabetes).

Portions of this release were also shared on AEB’s social media sites with fans and followers reacting positively to AEB’s back-to-school content. This release was also repurposed to reach those in foodservice and food manufacturing. As more back-to-school articles appeared, AEB followed up with the media.

Serena Ball also worked with AEB on an audio news release that began airing on August 5. A blogger program also highlighted AEB’s survey and emphasized the importance of eggs for breakfast. Partnerships like these extend AEB’s reach. Parenting bloggers conducted a two-week breakfast swap and wrote about the effects of a high-quality breakfast on their kids. Health professional bloggers added third-party credibility to AEB’s messages.

ENC also created an infographic that captured the benefits of an egg breakfast that reached both the media and health

professionals. As appropriate, AEB utilized this easy-to-read and eye catching document in its other departments.

REACHING CLASSROOMS WITH THE A-B-C’S OF EGGS

While parents and kids are getting ready with eggs, teachers can, too. As a part of the Good Egg Project, America’s egg farmers have partnered with Discovery Education to give students a glimpse into where their

eggs come from and how they can eat healthily at home by following the MyPlate template. Teachers can visit The Good Egg Project: Education Station for nationally standardized lesson plans and videos, including archives of virtual field trips to egg farms. Teachers and students can join third-and-fourth generation egg farmers on a tour of their farms, and stay for a question and answer session all about eggs.

Gear up for fall by visiting IncredibleEgg.org for quick and easy breakfast recipes, “Liking” the Incredible Edible Egg on Facebook, following @IncredibleEggs on Twitter, or going to Pinterest for more breakfast inspiration! For more information on the Good Egg Project visit the Discovery Good Egg Project Education Station.

If you would like more information on AEB programs or recent results, please do not hesitate to contact me by phone, 847.296.7043, or by email, jivy@aeb.org. **UB**



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NFI's 2013 future leaders class in full swing

This year, as part of the 2013 National Fishery Institute's (NFI) Future Leaders program, a group of over 30 seafood industry professionals went coast-to-coast to engage in a series of workshops with top industry companies and professionals to expose them to varying levels of the trade.



Pacific Oyster House employees on the shucking line.

Since 2008, NFI has gathered handpicked groups of industry professionals to represent a class of leaders who will advance seafood education and awareness by obtaining widespread exposure from the boat to the dinner table.

"It's a great group of Future Leaders this year," said NFI's Gerrie Thomas, director of member relations & communications and Future Leader program coordinator. "You don't get to know this industry from behind a desk."

This year's class of 36 started the year in Miami, April 30- May 2, where they were given a tour of Quirch Foods Co. plant. There the group witnessed seafood distribution first-hand as products were received and distributed to the major Miami market.

Afterward, the class participated in a sensory workshop with Pescanova USA's Victor Garrido, director of quality assurance & regulatory affairs for the company. From rancid Mahi cuts to fresh tuna steaks, the Leaders learned about FDA standards for freshness and how full time inspectors judge seafood quality via their sense of smell.

The first evening concluded with a presentation by the University of Florida's Dr. Steve Otwell and his graduate student Molly Sims on shrimp phosphates. The class learned valuable lessons on consumer salt preferences and how researchers are attempting to make healthier, lower sodium seafood options that still carry the same flavor as their saltier counterparts.

The Miami session started day two with breakfast with NOAA Consumer Safety Officer Monty Berg and a presentation about the government's role in assuring seafood safety for consumers.

The day continued with a trip to the Bimini Boatyard Bar & Grill for a lunch discussion from Michelle L. Terorotua, general manager at Vandegrift Forwarding brokerage service. Terorotua offered the Leaders an overview of proper importing rules and regulations among other key importing tidbits.

The Miami workshop ended with a brief tour of the Port of Miami to get a better understanding of the labor intensity of loading and unloading containers and how the process works to get product to warehouses across the country.

For Mickey McCabe, Executive Vice President for USI New England, an insurance professional who services the seafood industry but considers himself an outsider looking in, the program has demonstrated the immense dedication the industry's professionals carry with them to propel the sustainability and success of their business.

"It is amazing watching the commitment of NFI and its members to strive to be best in class and keep the sustainability going



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for the future of the industry,” McCabe said. “By seeing how the seafood industry is accomplishing their goals enables me to educate the insurance industry that the seafood sector is a great industry to do business with.”

From the spring shores of Miami, the Leader’s reconvened in mid-July, this time on the West Coast in Portland, Oregon.

The group started the workshop by heading out to Astoria for a tour of Pacific Oyster House. There, they learned about Pacific’s oyster growing process before touring the company’s clock-work production process from start to finish.

The class then headed over to Bornstein Seafoods where company co-owner Andrew Bornstein and Bornstein crab salesmen and NFI Future Leader Class 2012 President John Roy greeted the group for a tour of the facility to witness Dungeness crab and groundfish processing operations.

Next the team headed over to Astoria Aquatic Center to learn about safety-

at-sea survival training where everyone participated in a number of safety techniques while passing tools used by fishermen in an emergency.

The Leaders were then treated to a full-body training experience, getting an opportunity to don a survival suit to take a dive in the local pool to test out all of their newly minted survival skills.

“They’re getting a real taste of how dynamic, and wet, the program can be,” Thomas said. “Safety at sea survival training in Oregon is a real eye opener for some.”

After training it was time to head to the Oregon State University Research and Education Center where Dr. Jae W. ‘the Surimiman’ Park taught the class about his work with surimi seafood and his lab’s efforts to expand the U.S. market by researching new ways to incorporate surimi into the American diet.

The session concluded in Clackamas at Pacific Seafood’s main plant. Pacific’s CEO Frank Dulcich educated the leaders about his management philosophy that centered on positive team building and effective problem solving through strong leadership and diligent decision making.

Following, was a top-to-bottom tour of Pacific’s vertically integrated seafood operation including an overview of the company’s unique, in-house designed traceability system used from the boat to the dinner table.

“What Pacific Seafood and their staff expect of themselves is amazing,” said Ryan Martin, sales manager for Preferred Freezer Services in Boston Harbor. “The type of organization and presence they have in the market and where they are going is impressive.”

The Future Leaders will round out the year with two more sessions in Boston and Washington DC. Preferred Freezer, Ipswich Shellfish and Stavits Seafoods will open their doors to the group in Beantown; then in DC the Class will take to Capitol Hill where they will meet with



Dr. Jae ‘Surimiman’ Park educates the Future Leaders on surimi seafood processing.

lawmakers and get a taste for how policies that influence the industry’s rules and regulations are shaped.

Additionally, as part of the NFI Future Leader program, the class will be working with seafood charity organization SeaShare whose efforts go towards promoting the gathering of more seafood donations to feed America’s hungry children.

This year’s project will head to Galveston, TX to the Galveston Island Shrimp Festival, September 27-29 to raise donations and awareness for SeaShare to a crowd of 15,000 anticipated attendees.

With the support of the NFI Alumni and member companies, SeaShare and event organizers Yaga’s, the Leaders will host a number of booths where they will sell packaged seafood goods for charity donations. A 50/50 will also be held and some Future Leaders and SeaShare representatives will be on hand to pass out educational materials and speak about the cause with festival attendees.

The Future Leaders class will end their journey where it all began in Miami at the NFI’s 2014 Global Seafood Marketing Conference in January where they will receive their graduation certificates and coveted alumni status, completing another stellar series in the Future Leader program. **UB**

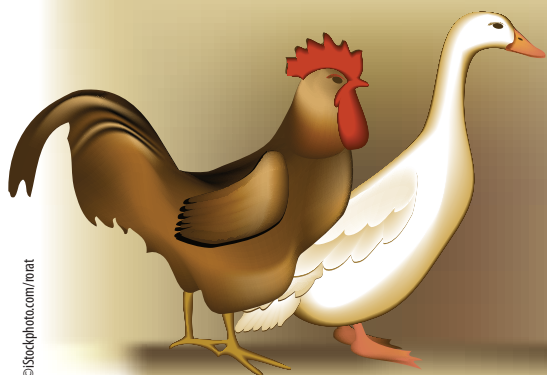
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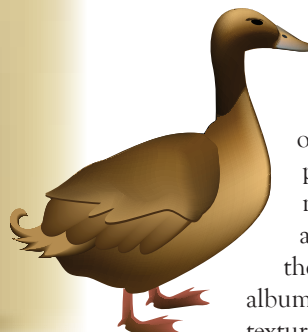
Future Leader Jeff Hodge of Seaport gets ‘saved’ by Trident’s Jeff Welbourn during survival training.

More than they're "quacked" up to be...

Delectably delicious duck eggs



"...duck eggs are noted for their 'eggier' flavor."



2013 may be the year of the snake on the Chinese zodiac but culinary insiders are beginning to think it's the year of the duck! More precisely it's the duck egg that's garnering some serious attention; charming chefs from coast to coast. Food trends, however, can be fickle and it is not easy telling whether this is a legitimate

movement to mainstream or just another flash in the (frying) pan.

Duck eggs are similar in many ways to chicken eggs but at the same time exhibit certain traits which are often preferred in the kitchen. The most obvious difference is in size. Most duck eggs are invariably

larger than chicken eggs and contain a yolk which could be characterized as thicker or creamier. According to Chef Scott Swartz Assistant Professor, Culinary Institute of America, New York, because of their richness and consistency, pastry chefs prefer a duck's egg when making custards, Crème brûlée, or a quiche. The numbers show that they are somewhat higher in fat and albumen which helps develop a richer texture and creates a product that will stay moist longer. However, when scrambled or fried, the lower water content in a duck eggs, as compared to a traditional chicken eggs, makes them easier to overcook.

As for consumers who may typically be buyers of free-range chicken eggs, make an easier transition to using duck eggs than do those who buy "traditional" commercially produced eggs at their local grocery store.

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This is largely because duck eggs are noted for their “eggier” flavor which is more similar to that of a true free-range chicken. Chef Swartz related much of this taste profile to the feed being ingested by our feathered friends. Unlike commercial eggs where the laying hens are fed a regimented, science-based diet, free-range chickens, and ducks to a lesser degree, are fed what’s available on the farm. “Mother Nature is not really about consistency of feed,” Swartz says. Of course, with duck eggs specifically, it’s the higher ratio of yolk to water which gives it that more “intense” flavor.

Access to a ready supply of duck eggs is not the challenge that it used to be. Distributors and foodservice buyers have any number of channels through which they can source eggs. However, cost considerations have proven to be somewhat of an obstacle to their more widespread use at the HRI level as well as by the everyday consumer or weekend chef. Depending on the situation, duck eggs can cost as much as 5 to 10 times as much as commercial chicken eggs.

For the most part then, cost is not an impetus to serve duck eggs. “There are really only two reasons to serve duck eggs,” say Chef Swartz. The first is to offer something truly “unique and different than the next guy” and, on an apples to apples basis, to serve up a different flavor profile



Chef Scott Swartz, Culinary Institute of America, says that duck eggs offer something “truly unique and different...”



A duck egg's size falls between that from a chicken (L) and a goose (R) and possesses a distinct flavor profile and consistency.

in a traditional recipe. “The majority of product (ingredients) everyone uses is the same stuff. A good chef has to figure out how to make someone buy from him instead of someone else.”

So, the year of the duck, it is not; but duck eggs are finding a growing role in the kitchens of the more creative, out-of-the-box thinking chefs looking for something a little different to tweak a

time-tested recipe. Perhaps the push for consumers to buy fresh, local ingredients will help duck eggs find their niche in the home cook’s kitchen. Whether making their way into the mainstream or just the latest whim in the hands of the most creative chefs, duck eggs are waddling their way into America’s kitchens. **UB**

*Article contributed by Russell W. Whitman
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Photos courtesy Culinary Institute of America/Keith Ferris



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Shrimp shortage stokes global competition for Ecuadorian product sending offers higher in 2013



“This Asian demand for Ecuadorian shrimp has limited U.S. access to product.”

Global competition for shrimp imports has helped pushed the U.S. shrimp complex to new highs as the 2013 global supply shortage put increased pressure on Ecuadorian offers.

Production issues related to Early Mortality Syndrome (EMS) have crippled shrimp

production from Thailand—traditionally a top shrimp supplier; U.S. YTD imports from Thailand are down 35 percent through June.

Moreover, Thailand’s struggles resulted in a global shrimp shortage that sent buyers scrambling for product from other producing nations in 2013, such as Ecuador.

12 percent in 2012. Meanwhile, the U.S. share for Ecuadorian shrimp has fallen to 33 percent, a 7 percent decline year-over-year. The figures were more pronounced in June with Asia accounting for 28 percent of Ecuadorian shrimp imports compared to 8 percent in 2012; this as the U.S. share fell from 36 percent to 28 percent.

On top of Asia’s expanding market presence for Ecuadorian shrimp, Europe—a significant market for Ecuadorian product—has seen little resistance in acquiring product.

Unlike the U.S., the EU market share for Ecuadorian shrimp has remained relatively steady year-over-year, falling a marginal 1 percent YTD in June totaling 97.5 million lbs.

Still, in June even the EU saw a significant (26 percent) drop in imports from Ecuador; a likely result from Asia’s massive June competition for Ecuadorian product mentioned earlier. It should be noted, however, that the EU market may see a summer slowdown in August that some U.S. buyers said could provide some relief on current importing pressures.

But for now this increased global demand for shrimp has contributed to progressively higher offers and therefore prices across the shrimp complex in 2013. As of the first week of August, Urner Barry quotations for 41-50 farmed

Ecuador’s total shrimp exports through June of this year are up just 2 percent compared 2012 levels. But shrimp buyers, particularly Asian buyers in Vietnam and China, have targeted the Ecuadorian market for product. Total Asian shrimp imports through June 2013 are up 76 percent compared to year ago levels, rising 20 million lbs year-over-year to 48.5 million lbs. In June alone, Asian imports from Ecuador surged 233 percent year-over-year to 11.6 million pounds.

This Asian demand for Ecuadorian shrimp has limited U.S. access to product. In June, for example, U.S. shrimp imports from Ecuador were down 27 percent; YTD the U.S. imported about 20 million less pounds of shrimp from Ecuador, about a 15 percent decrease year-over-year.

Asia’s demand for Ecuadorian shrimp in 2013 has seen the region’s global market share expand considerably.

Through June of this year, Asia accounted for 21 percent of the Ecuadorian market share compared to



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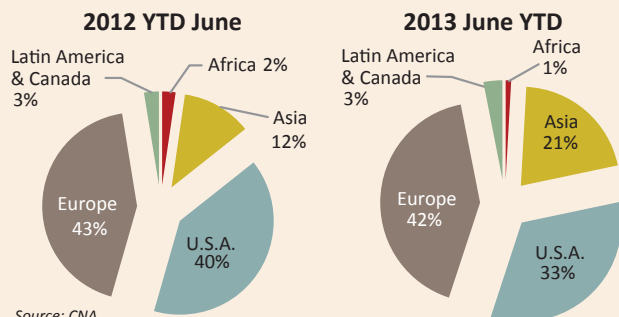
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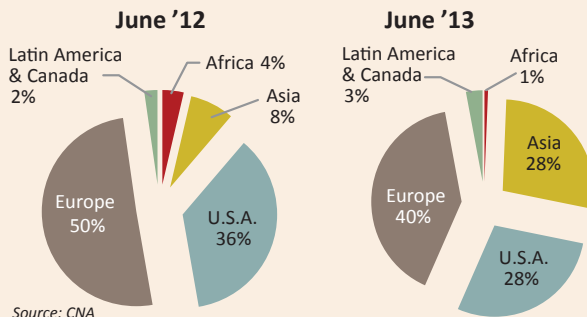
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2012 vs 2013 YTD (Jan-Jun), Ecuadorian Shrimp Exports by Destination



2012 vs 2013 Ecuador Shrimp June Exports by Destination

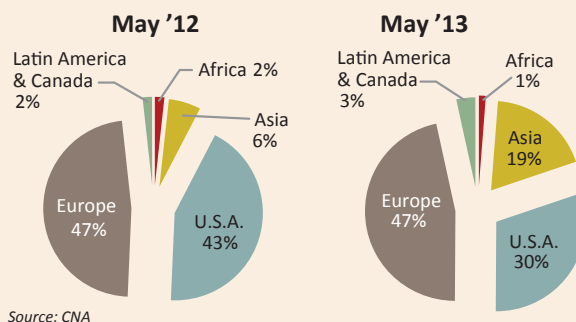


raised C&SA headless whites were at \$5.50/lb, a 52-week high. Additionally, 50 shrimp items have set price records across Urner Barry's complex—about 20% of all the shrimp items that are quoted.

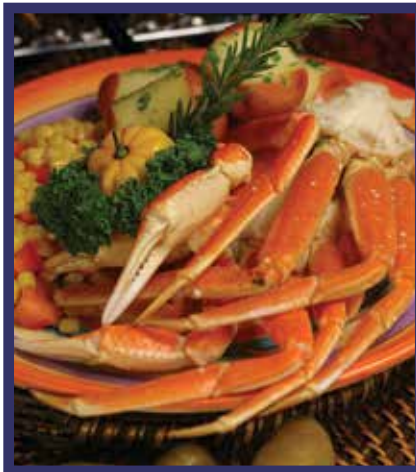
Currently the complex continues to remain strong across all categories with urgency to secure product noted. So as top importing nations look to Ecuador, India and Indonesia as stop-gap solutions to plug Thailand's shortfalls, U.S. buyers are now contending with increased competition from both EU and now Asian buyers, for market share that has helped increase pricing pressure for U.S. market participants. **UB**

Article contributed by Michael Ramsingh | Mramsingh@urnerbarry.com

2012 vs 2013 Ecuador Shrimp May Exports by Destination



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Food truck popularity revs up

“For now at least, food trucks need not be viewed as a threat to restaurant demand nationally...”



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It can be said with little debate that the hippest food trend so far this decade is food trucks. They seem to be popping up everywhere, and are a favorite for the quick-gourmet, food-loving lunchtime crowd.

The desire to run a truck is easy to understand as it is an easy way to get into the restaurant business with lower overhead and startup costs than a full-scale, high rent establishment. The trend cannot be denied as the popularity of food trucks has been evident across the country, and most cities have seen growing numbers of food trucks parked along their streets.



of QSR outlets, according to NPD. Since the top foods typically offered by food trucks are hot sandwiches, Mexican foods, cold sandwiches, and soups, Mexican and sandwich QSR places may view food trucks as more direct competition than other restaurant categories.

QSR firms were already in tune to the growing threat of the food truck movement. Most recently, and prior to the summer of 2013, White Castle, Stouffer's and Friendship Dairy were among the many brands to initiate the mobile units. And Wendy's, Chick-fil-A, Taco Bell, Applebee's and Sizzler were already keen to using food trucks as a means to extend their marketing platform, a sampling platform and as a way to try out the feel of a new location long before that.

“For now at least, food trucks need not be viewed as a threat to restaurant demand nationally,” says Bonnie Riggs, NPD restaurant industry analyst. “However, in markets with a developed food truck presence, QSR operators may wish to take note of the benefits food trucks offer, such as different and fresh food, especially as a means to build their snack business and/or protect lunch traffic.” **UB**

Article contributed by Linda Lindner
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It has often been said, however, that food trucks' perceivable threat to brick-and-mortar restaurants has grown since they appeared on the restaurant scene, and a recent survey conducted by The NPD Group shows that consumers do replace a quick service restaurant (QSR) visit with a food truck visit. In fact, the NPD foodservice market research survey, which addressed the awareness and practice of obtaining foods and beverages from food trucks, asked respondents where they would have obtained their meal or snack if not from the food truck, and about half of the consumers surveyed said they would have ordered from a fast food restaurant. Another 20 percent of respondents said they would have skipped the meal altogether, implying their visit to the food truck was spontaneous or unplanned.

The top reasons consumers gave for using food trucks related to availability of “interesting” foods and convenience, which are the traditional strengths



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U.S. importers say tilapia prices may rise

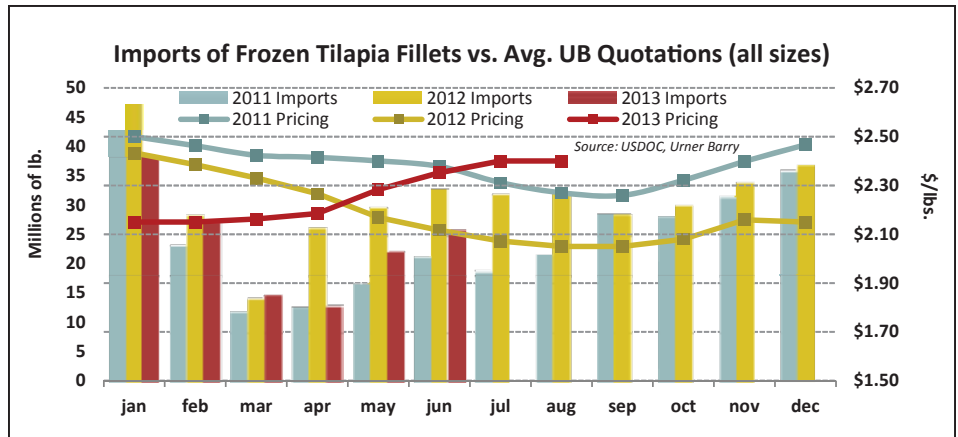
This article was adapted from one that originally appeared on July 24, 2013 in Seafood.com News by Michael Ramsingh
Mramsingh@urnerbarry.com



U.S. frozen tilapia fillet prices are at two-year highs and, according to importers, could continue to rise as China's tilapia supply base is significantly shorter compared with previous years—which has sent U.S. imports markedly lower.

Average Urner Barry quotations for 3-5 oz frozen tilapia fillets stand at 2.30/lb, up 20 percent from year-ago levels and the highest recorded price since May 2011.

The price increase coincides with a 20 percent fall in U.S. frozen tilapia fillet imports to 140 million lbs through June, driven by shortfalls from China, the top tilapia supplier to the U.S. According



to the U.S. Department of Commerce, Chinese tilapia imports to the U.S. through June registered 124.5 million lbs. compared with 157.1 million lbs a year prior.

According to one major importer, China's production woes are a result of massive 2012 buying—when U.S. importers

jumped on a glut of cheap tilapia last summer that drove U.S. imports up 65 percent compared with 2011.

This jump on summer orders saw replacement costs—or the import value per pound—plummet from \$1.94/lb in May 2012 to \$1.75 in October of that year.

However, according to importers, this 'emptying of the ponds' last year caused demand to exceed supply in 2013 which forced overseas replacement costs to soar 17 percent from \$1.75 to \$2.05/lb in the early part of 2013, the highest such value since May 2011.

At the same time, higher replacement costs were met with increased production costs namely with feed prices. For example, CME Futures Prices for soybean meal, as of the first week of August, were 10 percent above levels recorded in January 2011 and importers said these increased costs have pushed Chinese

"...according to importers, this 'emptying of the ponds' last year caused demand to exceed supply in 2013 which forced overseas replacement costs to soar..."



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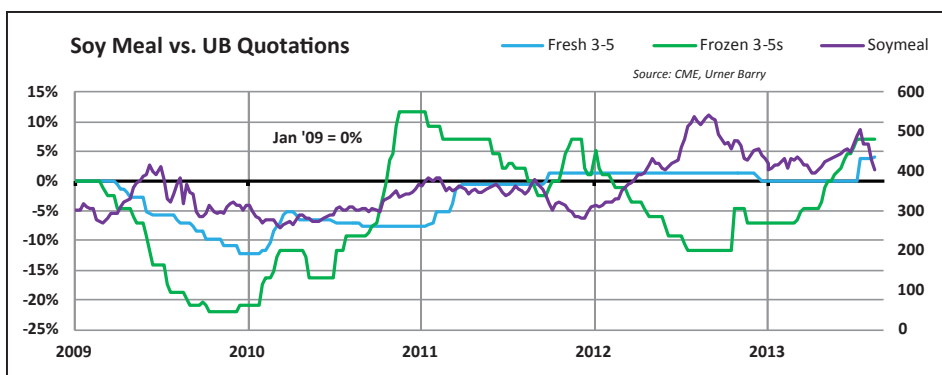
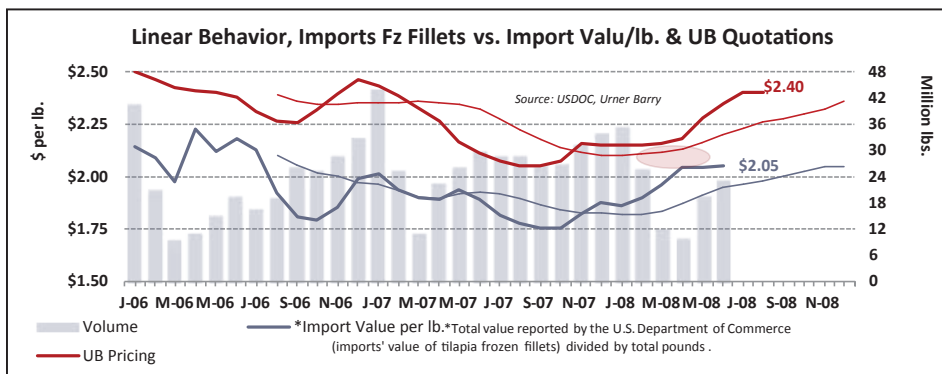


further as high production costs limit farmers

tilapia farmers out of the business, unable to produce under tighter margins.

Even though frozen tilapia fillet imports to the U.S. typically follow a seasonal trend—peaking in January, bottoming out in March and steadily increasing through the remainder of the year—importers said China's overall supply base is significantly shorter in 2013 than in years past which will result in less tilapia fillet imports to the U.S. for the remainder of the year.

So as the latest tilapia harvests are set to get underway, replacement costs remain at two-year highs as elevated production costs have pushed farmers out of the business, driving available raw materials, and subsequently imports, down significantly compared to year ago levels. And assuming demand remains constant and supplies continue to dwarf 2012 levels, a further hike in price could be on the horizon heading into the third quarter. **UB**



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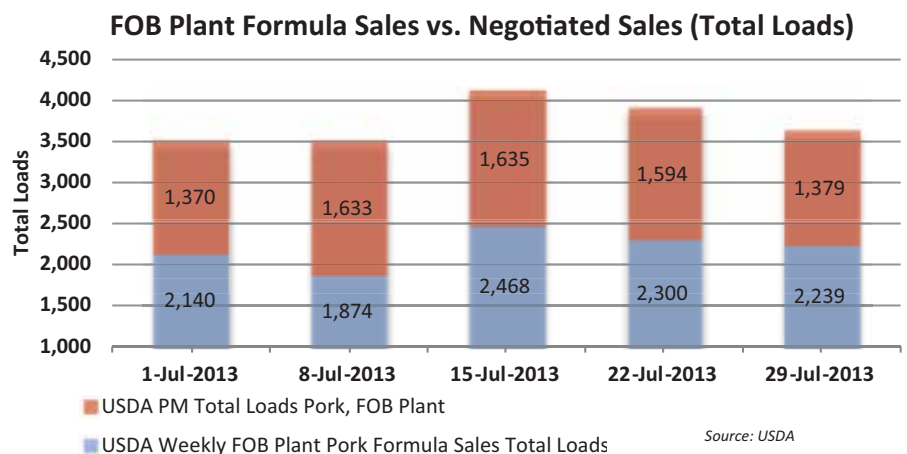
Facebook

Beginning in July 2013, the USDA began collecting and reporting on the formulated side of pork transactions. These reports include an almost identical amount of items as the negotiated reports yet are weekly publications rather than both daily and weekly like the negotiated reports. This significant portion of market transactions was never included in the voluntary system and therefore became a looking glass into a side of the market previously under the radar. Using Comtell charting abilities, we were able to determine that Formulated volume accounts for roughly 60% of the combined negotiated and formulated volumes. If and when a Forward Sales report becomes available, we will be able to

Pork Market									
Closing Urner Barry & USDA									
Thursday, August 01, 2013									
URNER BARRY		USDA FOB PLANT				USDA FOB OMAHA			
				Loads				Loads	
		Loads PORK CUTS		321.57 ¢				321.45 ¢	
		Loads TRIM/PROCESS PORK		20.36 ¢				20.31 ¢	
		Total Loads		341.00 ¢				341.60 ¢	
URNER BARRY		USDA FOB PLANT				USDA FOB OMAHA			
Price Range		Price Range				Price Range			
Carcass	95.107 -0.31		102.52 +1.39				102.18 +1.59		
Loin	121.08 +0.69		106.33 +5.06				106.16 +5.05		
Butt	98.62 +0.35		88.85 +0.83				88.16 +0.48		
Pic	73.22		-				68.84 +0.48		
Rib	142.50		131.37 -0.05				131.04 -1.66		
Ham	81.50 -2.00		80.18 -1.68				80.30 -1.31		
Belly	167.90		182.01 +3.89				181.42 +3.49		
URNER BARRY		USDA FOB PLANT				USDA FOB OMAHA			
Price Range		Pounds	Price Range	WtdAvg		Pounds	Price Range	WtdAvg	
1/4 Trimmed Loin VAC	118.00-123.00 +1.00	280,585	121.00-147.00	+9.85	125.03 +0.07	280,585	117.20-139.38	+9.90	124.16 -1.27
1/4 Trimmed Lin VAC, FZN		-	-	-	-	-	-	-	-
1/4 Trimmed Loin Paper		-	-	-	-	-	-	-	-
1/4 Trimmed Loin Paper, FZN		-	-	-	-	-	-	-	-
1/4 Trimmed Loin Combo		128,580	111.00-118.50	-10.57	111.50 +1.22	128,580	111.05-115.45	-11.78	111.37 +1.18
1/8 Trimmed Loin VAC	124.00-129.00 +2.00	254,353	119.00-144.82	-1.54	134.52 +3.53	254,353	111.10-138.60	-8.13	130.15 +0.79

“With now over 350 pork cuts per report, Urner Barry has made it a focus to organize and clearly display these new elements of the pork market on Comtell.”

Article contributed by Russell Barton
Rbarton@urnerbarry.com



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Coalition of Maryland seafood supporters

Maryland is having success with its state level marketing program for blue crab and oysters, according to Steve Vilnit, Director of Fisheries Marketing for the Dept. of Natural Resources (DNR). Vilnit, who carries 13 years of seafood industry experience as tuna wholesaler before coming to the DNR, has developed a number of programs to help promote Maryland's domestic fisheries since 2010.

In 2012, Vilnit launched the Maryland True Blue program to encourage restaurants in the Delmarva region to source their crab products straight from Maryland's domestic industry. The DNR gave participating restaurants signage and marketing materials to use through their restaurant, such as menu indicators, that inform customers the blue crab they are ordering is straight out of a Maryland-based fishery.

"Customers can look at a menu and know right away that they're getting what they think they're getting," said Vilnit.

Since its launch, the True Blue program has more than quadrupled its participation

with participating restaurants—increasing from 26 establishments to 150 Vilnit said. Moreover, the state's crab meat processors have reported a 17 percent increase in domestic pounds sold since True Blue was started Vilnit added.

Following True Blue's success, Vilnit and the DNR—realizing the opportunity foodservice professionals have to educate their diners about Maryland's domestically harvested seafood industry—started a series of "Chef's Trips" out on the Chesapeake Bay.

"Too often in today's foodservice industry there is a disconnect between the consumers and the producers. This is especially true when it comes to seafood," said Vilnit. "The Maryland Seafood Marketing Program is working to reestablish the connections to the local waterways by allowing chefs to see exactly where their products come from and the people that harvest it."

For each Chef's Trip Vilnit pairs up with local boat captains and brings a team of chefs, from restaurants as far away as

Philadelphia to as regional as Baltimore, to get a hands-on education about Maryland's domestic fisheries.

On a late-July trip, six chefs from Baltimore's 13.5% Wine Bar motored off on the fishing vessel Red Osprey with Simon Dean. The day-long cruise on the Patuxent River took the chefs around the region's wild oyster dredging and blue crab trot lining fisheries, getting the opportunity to taste fresh oysters pulled from the water and man a crab net with a local waterman.

"As the Chef, I am constantly in contact with local purveyors, fishers and farmers," said Kate Ward Executive Chef at 13.5% Wine Bar. "I have the opportunity to see and learn a lot about the products I am bringing in...it is our job in the industry to expose people to the amazing products we have right here, so readily available."

Back on the water, the day concluded with a tour of Tal Petty's Hollywood Oyster Company, an oyster aquaculture operation located right on the Patuxent. There the chefs sampled Petty's offerings and

discussed the science behind his operations and Maryland's new found interest in promoting the state's steadily recovering oyster aquaculture industry.

In fact, Maryland has been proactive in restoring the Chesapeake's depleted oyster grounds by obtaining a series of state and federal grants to rebuild the Watershed through a number of oyster recovery efforts.

The Oyster Recovery Partnership has been at the forefront of Maryland's campaign to restore the state's



Oysters get ready to tumble at Hollywood Oyster.

give big push to boost regional interest

once thriving oyster beds according to the program's director Stephan Abel. Via a collaboration to plant disease-free oysters, the partnership has planted four billion oysters on 1,500 acres of oyster reefs.

Additionally, the ORP started the Shell Recycling Alliance to remedy the shell shortage that has been plaguing the industry.

"Shell right now is the single limiting factor in everything we do," Abel said.

The Alliance has set up a network of over 200 partnered restaurants and also works with local consumers to retrieve oyster shells; contributors are able donate their shells and receive a tax credit from the state.

According to the ORP reviving Maryland's oyster fisheries will not only benefit local seafood consumers but provides the Chesapeake with a significantly cheaper alternative to cleansing the environment

versus pricey desalination and water treatment plants.

Meanwhile Vilnit and Abel agreed that Maryland's seafood industry benefits full circle from a targeted marketing standpoint.

From promoting the industry's blue crab and rebounding oyster populations, while educating local foodservice professionals to broaden consumer's seafood interest, expectations are abound to see more Maryland seafood at Delmarva dinner tables in years to come. **UB**

Article contributed by Michael Ramsingh
Mramsingh@urnerbarry.com



A freshly shucked oyster from the Chesapeake.



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Hopeful 'hotdoggers' face heavy competition...

Oscar Mayer's Weinermobile program offers rare marketing experience



Families line up outside of a grocer in Toms River, NJ to check out the Weinermobile.

All year long, grocery store parking lots throughout the country play host to one of the largest mechanical food inventions on wheels—none other than Oscar Mayer's Weinermobile. While millions of Americans have had the opportunity to see the iconic vehicle, just a select group of individuals ever get a chance to pilot the mobilized hot dog.

The longtime hotdog brand has marketed the classic American food staple using the famous Weinermobile since 1936 when the first rendition of the hot dog-on-wheels took to the streets of Chicago.

More than just a marketing tool, the Weinermobile was birthed right from Oscar Mayer's namesake family with the first model developed by Carl Mayer, Oscar Mayer's nephew.



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Since then, a number of new Weinermobiles have been launched to promote the Oscar Mayer brand; from the "Space Age Sizzle" developed in 1958 to the "Mini-Mobile" created 60 years after that.

Along with the vehicle's evolution, the campaign itself changed, and in 1988 Oscar Mayer started a new program where a select class of "Hotdoggers" would pilot the Weinermobile across the country to share the Oscar Mayer brand with consumers. Appearances are not limited to local grocery stores and shopping mall parking lots; Hotdoggers have visited major events including the Super Bowl and Kentucky Derby.

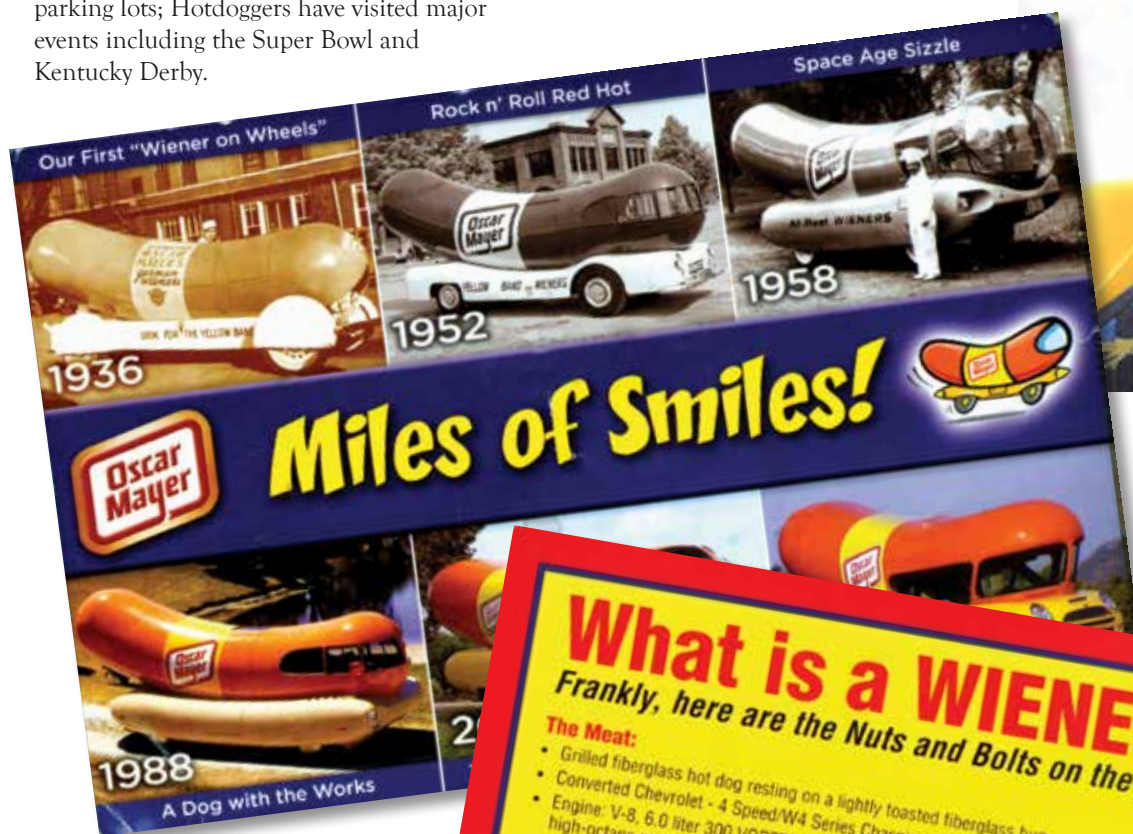
BUT BECOMING A HOTDOGGER IS NO EASY TASK

According to Oscar Mayer, approximately 1,200 college graduates jockey for just 12 available positions each year. Since the inception of the program, 300 college graduates have served as a vehicle spokesperson spanned over 26 classes of Hotdoggers.

Currently, the fleet of six Weinermobile's and their 12 Hotdogger pilots are navigating the continental United States this summer, but applications are already being accepted

for the next round of drivers, and if history is any indication, just a select few should expect to 'cut the mustard.' **UB**

Article contributed by Michael Ramsingh
Mramsingh@urnerbarry.com



TOP: The Oscar Mayer Weinermobile has evolved from Carl Mayer's original 1936 vehicle to the vehicles seen on the road today.

RIGHT: The 1995 Weinermobile grew in size to 27 feet long and 11 feet high.



The Weinermobile sure can cut the mustard! Preferred parking is a must wherever this bun travels.

What is a WIENERMOBILE?

Frankly, here are the Nuts and Bolts on the WIENERMOBILE Vehicle

The Meat:

- Grilled fiberglass hot dog resting on a lightly toasted fiberglass bun
- Converted Chevrolet - 4 Speed/W4 Series Chassis
- Engine: V-8, 6.0 liter 300 VORTEC 5700- runs on high-octane mustard

The Condiments:

- Gull wing door with automatic retractable step
- Hot dog shaped dashboard
- Hotdogger voice activated GPS Navigational system
- Ketchup walkway
- Condiment splattered carpet
- Computerized control panel with a sound system to Relish
- Removable Bunroof
- Rear navigational camera
- Blue Sky ceiling art
- Six Mustard and Ketchup colored seats
- Smiling front grill
- Official Wiener Jingle horn

(Dog)imensions:

Height:	11 ft.	24 Hot Dogs high
Length:	27 ft.	60 Hot Dogs long
Width:	8 ft.	18 Hot Dogs wide

© 2010 Kraft Foods

Softshell Clam

Fish and shellfish species identified at your fingertips...

This two-page spread is a sample from Urner Barry's *Commercial Guide to Fish and Shellfish*, the essential reference for the seafood industry professional. Complete with detailed descriptions specific to the species, each entry provides the user with all the vital information necessary to purchase, sell and consume both imported and domestically available seafood.

Visit shop.urnerbarry.com to order yours today.



Specifications

Market name	Clam, Softshell
Scientific name	<i>Mya arenaria</i>
Common name	Softshell Clam

Description

The softshell clam, also called Ipswich clam, belly clam, fryer or steamer, is a small, oval clam found along the Eastern seaboard from the Canadian arctic southwards to North Carolina and, to a lesser extent, along the U.S. Pacific Coast and Europe. They are dug from beaches and shallow water. The further south the clams are harvested along the Eastern U.S., the larger they tend to be, and consumer preference varies according to locality.

Softshell clams are one of the most delicate of all molluscs to handle. The oval shells do not quite contain the entire animal. The siphon protrudes beyond the shell, so the clams can dehydrate quickly, which kills them. It is vital to keep them in a moist atmosphere using plenty of ice or wet seaweed. The shells are quite brittle and easily broken or chipped. Live clams in bushel baskets or bags must be treated very gently. Bangs, knocks and shaking can kill them. Although ice is essential for keeping clams cool and damp, never let them sit in ice: since the shells are not completely watertight, the clams are highly vulnerable to being killed by drip from fresh water ice. Dead clams must not be used.

Nutrition Facts

Serving Size: 3.5 oz

Amount Per Serving

Calories 74 **Calories from Fat** 8.7

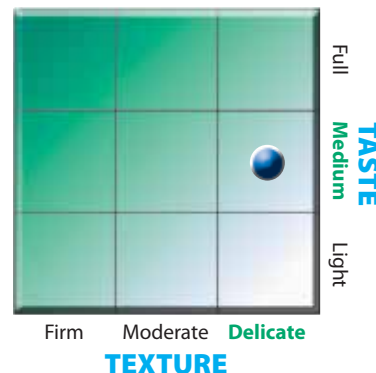
% Daily Value*

Water	81.82g	
Total Fat	1.00g	2%
Saturated Fat	0.1g	1%
Cholesterol	34mg	11%
Protein	12.77g	26%
Iron	13.98mg	78%
Sodium	56mg	2%
Omega-3	0.146g	

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

Eating Qualities

Softshell clams can be prepared in a variety of ways, however, they are best steamed. The meat is tender and sweet, and the color ranges ivory to creamy tan. Softshell clams tend to be gritty and should be purged prior to steaming. It is also common to shuck, bread and fry them.



Fish Fact

As the nickname steamer implies, the best way to enjoy softshell clams are steamed whole and in the shell.

Fishing Methods

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

The long siphon or neck cannot be entirely enclosed by the shell. The end of the siphon is covered in a thin black skin, which many people remove when eating the clams steamed.

Softshell clams, like all other clams, are subject to the controls of the National Shellfish

Sanitation Program. All containers must carry the tag of the shipper.

Softshell clams are typically sold either live in eight gallon bushels or as frozen meat products; and in some instances

as fresh shucked meats in gallon containers. Clams in the shell are used for clambakes and for steamed clams. Shucked meats are typically breaded and fried. Softshell clams are generally too expensive to be used for chowders and other recipes requiring minced clams, and they are typically not eaten raw.

There is considerable labor cost in shucking and it is seldom, if ever, worth doing it yourself. The shucking plants in catching areas have expert labor capable of a very high output of clam meats. Many users prefer to buy their fryers already shucked and then bread

the clams themselves. However, increasing quantities of fryers are sold already breaded and frozen, which is the most convenient way to handle them and avoid waste.

Frozen softshell clam meats are usually breaded and IQF, packed in four- or six-ounce portions ready for the fryer. 24/4 oz and 18/6 oz are usual packs. These clams are often called "whole fryers" or "Ipswich clams" to distinguish them from breaded clam strips. Softshell clams are not frozen whole, in the shell.



Live softshell clams.

PACK DESCRIPTION

IQF

24/4 oz 18/6 oz

Bushel
8 gallon

PRODUCT FORM

Live
whole
Fresh
meat
Frozen
meat
Value-added
breaded



Global Supply

TOP COUNTRIES:
Canada
United States



Value campaign inspires pork chop drop

Reprinted with permission from the
National Pork Board

Pork is a cut above when it comes to value and versatility. To prove you don't have to spend a lot of money to eat well, the Pork Checkoff created the popular "Pork Chop Drop" trivia game and new "10 for \$10" recipe collection this summer.

"These tools helped bolster the Pork Checkoff's value message, and we've had a great response," said Pamela Johnson, director of consumer communications for the National Pork Board.

From mid June and through July, consumers could play Pork Chop Drop at PorkBeInspired.com and the Pork Be Inspired Facebook page. After answering trivia questions about the new pork cuts and grilling preparation, consumers had the chance to unlock prizes, such as an exclusive new pork recipe, coupons for fresh pork and a chance to win a \$1,000 cash grand prize.

More than 27,000 users registered to play Pork Chop Drop, said Amy Busch, manager of digital marketing for the National Pork Board. "We tracked eight average log-ins per registered user and were pleased that people were playing more than once."

FOCUSING ON THE MEALTIME BOTTOM LINE

To help consumers save even more with pork, the Pork Checkoff teamed up with Danielle Smith, founder of the popular blog ExtraordinaryMommy.com, to host an integrated media tour and to create the new pork recipe Grilled Pork Chops with



American Pride Pork Chop.

Minted Strawberry Avocado Salsa. The cost of this recipe, which serves Smith's entire family of four, totals only \$9.61.

"I pay attention to pricing each week at the meat case, and I pick a pork cut that offers me the best savings," Smith said. "Pork is so versatile I can swap in multiple cuts with this recipe and still get the same juicy, flavorful meal every time."

YOU CAN'T BEAT 10 FOR \$10

To offer even more inspiration, the Pork Checkoff teamed up with Smith and nine other value-minded bloggers known for smart shopping to create the new "10 for \$10" recipe collection.

"These recipes are full of flavor, easy to prepare and use only a handful of ingredients," Johnson said. "They show how simple and affordable it can be to feed a family of four for \$10 or less."

The recipes feature a variety of pork cuts, from Grilled BBQ Pork Pizza Wraps to Rosemary Lemon Pork Chops. They were featured during the Pork Checkoff's June 27 Twitter party, where consumers discussed the meals they planned to grill at their 4th of July celebrations. The conversation became a U.S. trending topic, Busch noted.

SOCIAL MEDIA AMPLIFIES PORK'S MESSAGES

Throughout the summer, PorkBeInspired.com featured one of the recipes in the 10 for \$10 collection each week, along with the latest meat case pricing data comparisons from the U.S. Department of Agriculture.

In early June, for example, the Porterhouse Pork Chop was 67 percent less expensive than the Porterhouse beef steak. The Pork Checkoff used social media to help spread the word.

"Social media offers a very cost-effective way to promote pork, and it's gratifying to see how our messages are resonating with consumers," said Busch, who also shared that pork's value message was highlighted with opinion elites who attended the 2013 BlogHer Food '13 blogger conference in Austin, Texas, in June.

To keep the momentum going, the Pork Checkoff is encouraging consumers to visit [PorkBeInspired](http://PorkBeInspired.com), which includes [Pork Social](http://PorkSocial.com) online, to find more recipes, cooking tips and other special offers.

"We're consistently reminding consumers that pork offers the perfect budget-friendly way to eat well," Johnson said. **LB**

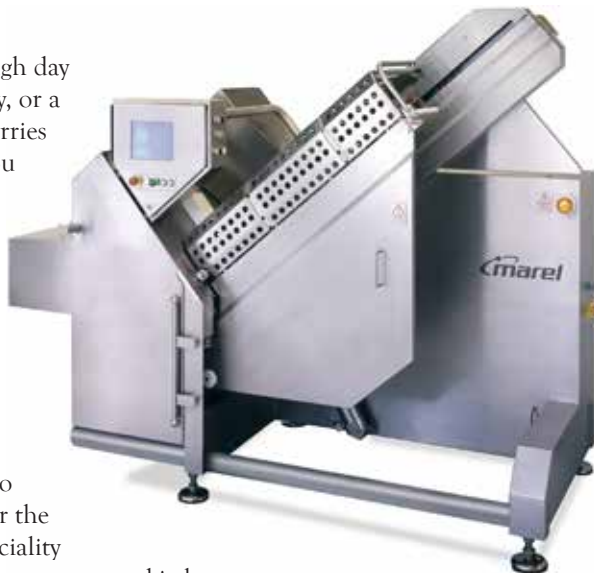


"These tools helped bolster the Pork Checkoff's value message,..."

Machine slices product to appear hand-sliced...

To be (perfect), or not to be?

One thing is for sure, after a rough day at work, an exhausting time away, or a stressful event, problems and worries seem to disappear the minute you walk in through the door and smell the delicious aroma of a home cooked meal. There is just something about it that warms one's insides. Maybe it's the thought that it was made with care and involved meticulous preparation that makes us feel better. Maybe it's all the effort that was put into the slicing and mixing. Whatever the reason, the natural look and speciality of food seems to entice consumers more than the overly processed look. In fact, more and more food manufacturers are now implementing this vision into their protein fabrication.



kitchen-cut product. But, how can these manufactures consistently mass-produce a product to look inconsistent? Take a look at the Marel Polyslicer 3000 Vision.

Companies have learned that we eat using our eyes, so it is only normal that what is natural and hand cut, appeals to us visually. From fast food companies to deli manufacturers, that cookie-cutter look is no longer the perfect product, now consumers want an "imperfect" product, one that resembles more of a home

One of the many challenges for a slicer is to be able to produce an item of fixed weight from a product that varies in shape, in fat content and which may even have holes. With the right machine, however, processors can obtain high levels of on-weights and low levels of giveaway. The Marel Polyslicer 3000 Vision for instance, can be used in conjunction with an automatic loading robot. The machine has a vision feature included on it that helps it to perform this very task. Combine that with lower levels of manual labor and higher levels of hygiene (because of the robot loading), and a processor now has a machine slicer capable of performing human-like "imperfect" product(s). The Polyslicer 3000 Vision is also capable of producing a wide-range of pack formats including stacks, shingles, shaved products and steaks.

For more information on the Marel Polyslicer 3000 Vision, visit:
<http://marel.com/meat-processing> **US**

Article contributed by Terence Wells
Twells@urnerbarry.com

"Companies have learned that we eat using our eyes, so it is only normal that what is natural and hand cut, appeals to us visually."



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New website something to gobble about

Contributed by the National Turkey Federation

As many of you know, the National Turkey Federation (NTF) has been engaged in a year-long project to re-shape its communications and marketing program. Soon, NTF will unveil one of the most visible symbols of the program's evolution: a re-designed website to meet the expectations and needs of consumers, reporters and NTF members. While the name remains the same, www.EatTurkey.com has many big changes.

Effective communication is vital to NTF and its members. We want to communicate about the big issues, as well as with household decision-makers about great recipes for turkey and chefs who want to find new ways to use the *Perfect Protein* in their restaurants.

The new website in a sense mirrors the re-shaped program: it has a significantly different look at first glance but retains all the best elements of what came before. The new website retains a healthy marketing and product promotion component, but EatTurkey.com now includes issues relevant to turkey growers and processors—the Renewable Fuel Standard (RFS), immigration, the Farm Bill, and more—on its landing page, not just in the Members Only section. The new site also will help educate the general public about how those issues can impact them as they try to stretch their food dollar. The new site will have the flexibility to adjust with the changing landscape of the animal agriculture industry.

Different audiences—from those looking to plan a delicious meal to those wishing to know more about where their food comes from and what affects them—will now be able to find answers at EatTurkey.com online. NTF found that people not only want to know a great recipe, but they also want to know where their food comes from, who made it, how to prepare it, and why it is a good value at the grocery store. EatTurkey.com integrates these topics, making it easier for consumers and members alike to stay informed.

Another component to the new website is social media. The National Turkey Federation dove-in head first with an aggressive social media presence, even before a Twitter or Facebook link was



included on the previous website.

Now, NTF's extensive social media activities, including great recipes on Pinterest, are featured on the website, giving members and interested parties a one-stop shop on the latest in industry news. NTF is engaged with consumers about turkey's wide variety of healthful and delicious offerings. Keep a watchful eye on NTF to lead more social media trends to come.

The integration of social media to the website gives consumers and members the ability to engage more directly. A strong part of NTF is grassroots support for legislative issues affecting the industry. The website is capable of introducing calls to action for turkey farmers and city consumers about issues that affect them. Legislators genuinely want to hear from their constituents, and the website can easily offer information on a concern and provide a quick and easy way to reach out.

The recipe section of the website is now more robust. Browsing easily leads hungry consumers to delicious and wholesome recipes that are quickly sorted by meal type. Searching for recipes also includes the option of using ingredients a customer particularly wants to add.

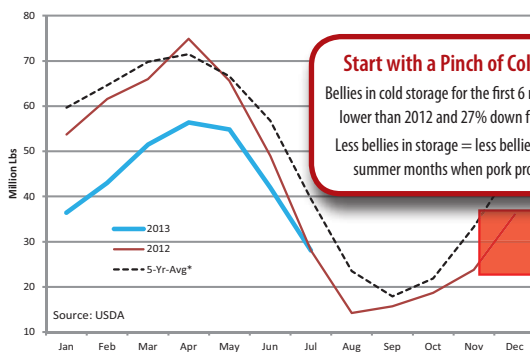
EatTurkey.com is frequently updated with information that is easy to find. Try out the newly-designed website—and don't miss out on a call to action, or trying out one of those new recipes for turkey. **U**

“...from those looking to plan a delicious meal to those wishing to know more about where their food comes from and what affects them—will now be able to find answers...”

The recipe for \$5/lb bacon

Popularity pushes prices...

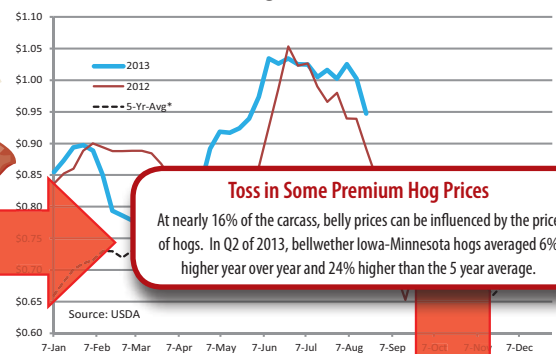
Stocks in Cold Storage - Frozen Pork, Bellies



Start with a Pinch of Cold Storage Stocks

Bellies in cold storage for the first 6 months of 2013 were 23% lower than 2012 and 27% down from the 5 year average. Less bellies in storage = less bellies available for the prime summer months when pork production is its lowest.

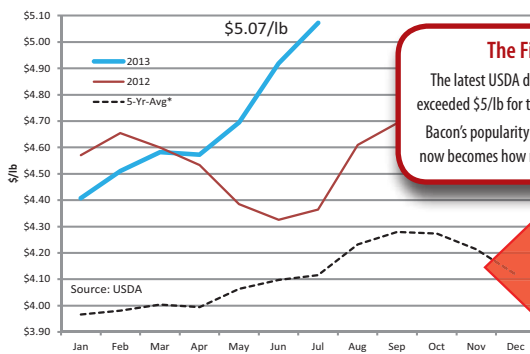
USDA Direct Hogs, IA/MN, Carcass Base



Toss in Some Premium Hog Prices

At nearly 16% of the carcass, belly prices can be influenced by the price of hogs. In Q2 of 2013, bellwether Iowa-Minnesota hogs averaged 6% higher year over year and 24% higher than the 5 year average.

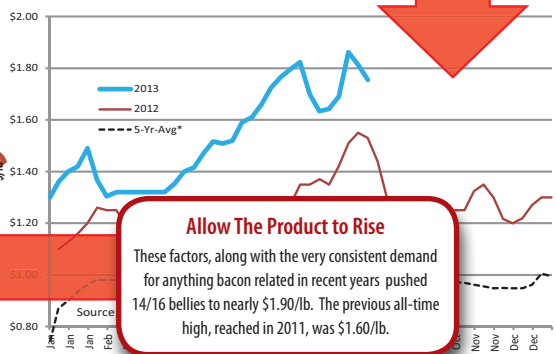
USDA Retail Prices, Bacon, sliced, per lb



The Finished Product

The latest USDA data (July) for retail bacon prices exceeded \$5/lb for the first time in that item's history. Bacon's popularity continues to grow. The question now becomes how much is the public willing to pay?

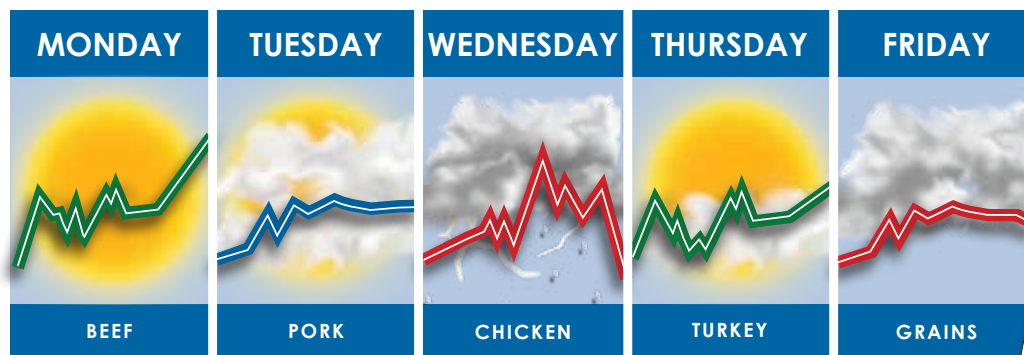
14/16 Bellies



Allow The Product to Rise

These factors, along with the very consistent demand for anything bacon related in recent years pushed 14/16 bellies to nearly \$1.90/lb. The previous all-time high, reached in 2011, was \$1.60/lb.

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Cost of raising a child in America today

“...the latest figures represent a 2.6 percent increase from 2011.”

The U.S. Department of Agriculture’s (USDA) annual report on the Expenditures on Children by Families has found that a middle-income family with a child born in 2012 can expect to spend about \$241,080 for food, shelter, and other necessities associated with child rearing expenses over the next 17 years, which translates to about \$301,970 when adjusted for inflation!

Known as the Cost of Raising a Child report, the latest figures represent a 2.6 percent increase from 2011. Expenses for child care, education, health care, and clothing saw the largest percentage increases related to child rearing from 2011. However, there were smaller increases in housing, food, transportation, and miscellaneous expenses during the same

period. The 2.6 percent increase from 2011 to 2012 is also lower than the average annual increase of 4.4 percent since 1960.

“As the economy continues to recover, families are naturally cost conscious. This report gives families with children a greater awareness of the expenses they are likely to face,” said USDA Food, Nutrition and Consumer Services Under Secretary Kevin Concannon. “The report is also a valuable resource for courts and state governments in determining child support guidelines and foster care payments.”

The report, issued annually, is based on data from the Federal government’s Consumer Expenditure Survey, the most comprehensive source of information available on household expenditures. For the year 2012, annual child-rearing expenses per child for a middle-income, two-parent family ranged from \$12,600 to \$14,700, depending on the age of the child.

The report, developed by the USDA Center for Nutrition Policy and Promotion (CNPP), notes that family income affects child-rearing costs. A family earning less than \$60,640 per year can expect to spend a total of \$173,490 (in 2012 dollars) on a child from birth through high school. Middle-income parents with an income between \$60,640 and \$105,000 can expect to spend \$241,080*; and a family earning more than \$105,000 can expect to spend \$399,780.

“One of the major expenses on children is food, and at USDA many of our programs are focused on making sure that children have access to healthy foods,” said CNPP Acting Executive Director Robert Post, Ph.D. “On our website we provide shopping strategies and meal planning advice to help families serve more nutritious meals affordably through the 10-Tips Nutrition Series and the Thrifty Food Plan. Our MyPlate symbol and the resources at ChooseMyPlate.gov provide quick, easy reference tools to facilitate healthy eating.”

For middle-income families, housing costs are the single largest expenditure on a

child, averaging \$71,820 or 30 percent of the total cost over 17 years. Child care and education (for those incurring these expenses) and food were the next two largest expenses, accounting for 18 and 16 percent of the total cost over 17 years. These estimates do not include costs associated with pregnancy or education beyond high school.

The report notes geographic variations in the cost of raising a child, with expenses the highest for families living in the urban Northeast, followed by the urban West and urban Midwest. Families living in the urban South and rural areas have the lowest child-rearing expenses.

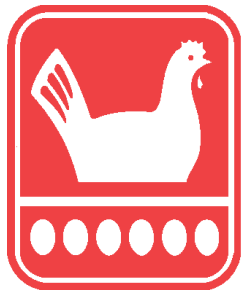
“Lower housing costs contributed to the reduced expenditures for families in rural areas,” explained study author and economist Mark Lino, Ph.D. “Families in rural areas also saw lower child-care and education expenses.”

In 1960, the first year the report was issued, a middle-income family could have expected to spend \$25,230 (\$195,690 in 2012 dollars) to raise a child through age 17. Housing was the largest expense on a child both then and now. Health care expenses for a child doubled as a percentage of total child-rearing costs. In addition, some current-day costs, such as child care, were negligible in 1960.

Expenses per child decrease as a family has more children. Families with three or more children spend 22 percent less per child than families with two children. As families have more children, the children can share bedrooms, clothing and toys can be handed down to younger children, food can be purchased in larger and more economical quantities, and private schools or child care centers may offer sibling discounts.

The full report, Expenditures on Children by Families (2012), is available on the web at www.cnpp.usda.gov. In addition, families can enter the number and ages of their children to obtain an estimate of costs through an interactive web version of the report. **US**

Source: USDA



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The United States Department of Agriculture

THE COST OF RAISING A CHILD

THE INFORMATION PROVIDED
COVERS THE COST FROM
BIRTH TO AGE 18.

\$241,080

WHERE DOES THE MONEY GO?

AFTER ADJUSTING FOR INFLATION,
THE COST OF RAISING A CHILD HAS
INCREASED 23% FROM 1960.

23% ↑

NOT INCLUDING THE ANNUAL
COST OF COLLEGE

PUBLIC
\$17,860

PRIVATE
\$39,518

*The College Board. 2013. Trends in College Pricing 2012.

30%



HOUSING

8%



HEALTH
CARE

6%



CLOTHING

14%



TRANSPORTATION

16%



FOOD

8%



MISC.

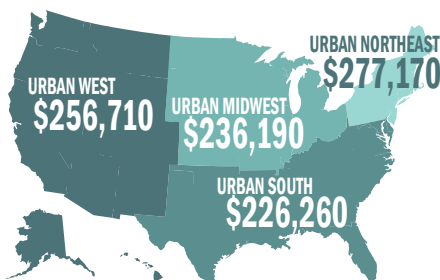
18%



CHILD CARE &
EDUCATION

COST BY REGION*

COST TO RAISE A CHILD FROM
BIRTH TO AGE 18 BORN IN 2012.



RURAL AREAS
\$190,290

OVERALL VS RURAL HOUSING COSTS*

OVERALL
\$71,820

RURAL
\$44,280

CHILD CARE & EDUCATION

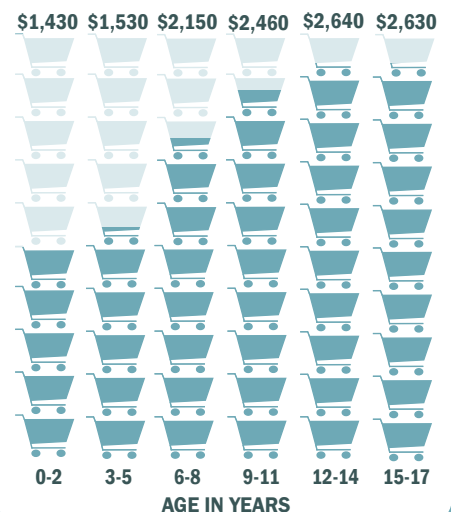
18%
(2012)

2%
(1960)

percentages of
total expenses



FOOD COST BY AGE*



*U.S. average for middle income husband-wife families.

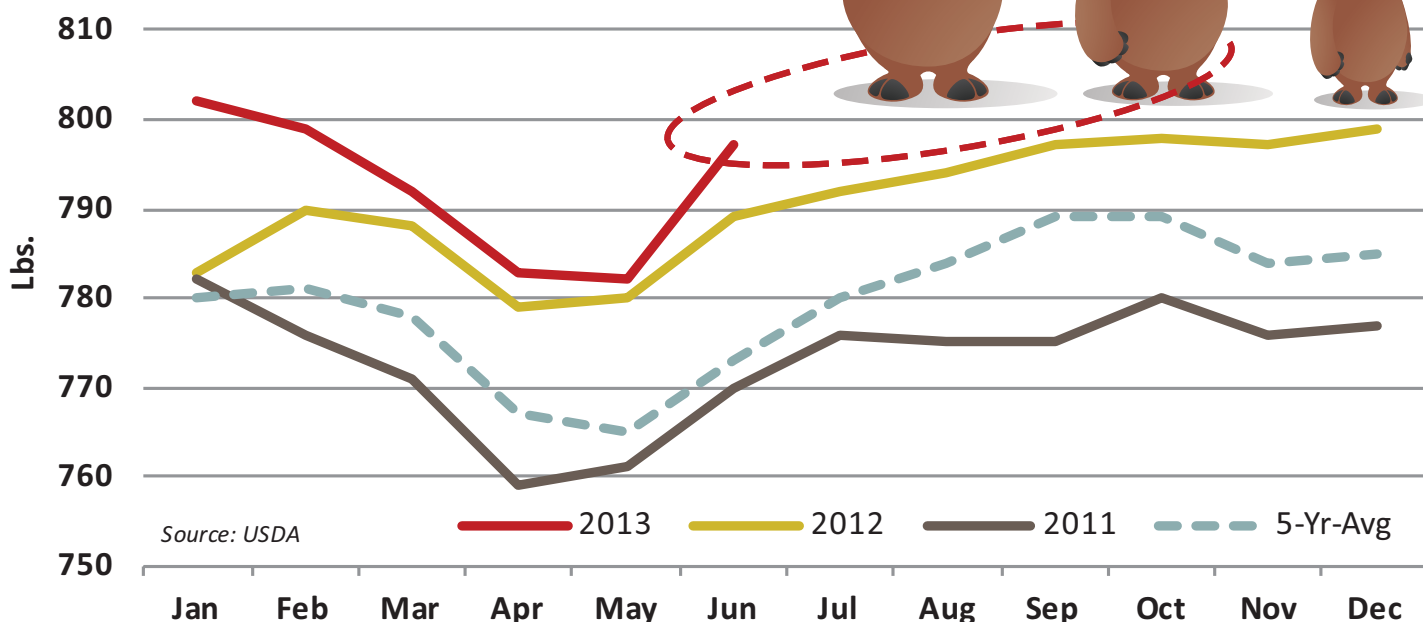
Source: Expenditures on Children by Families, 2012. U.S. Department of Agriculture, Center for Nutrition Policy and Promotion. Miscellaneous Publication No. 1528-2012. August 2013

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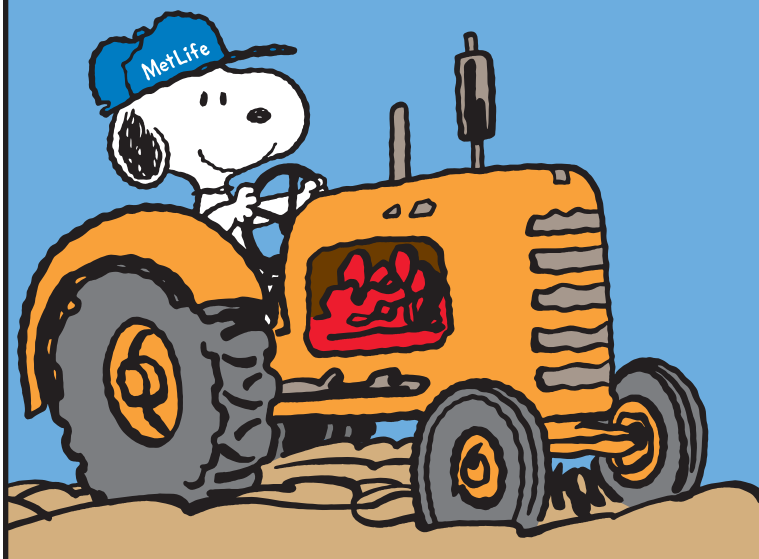
Use of fewer growth drugs may affect cattle weights

As the cattle industry re-examines its practices with the use of growth-promotion drugs, which can add anywhere from 10-28 pounds, there is speculation that it could affect cattle weights moving forward.

USDA F.I. Dressed Cattle Weights, Monthly Average



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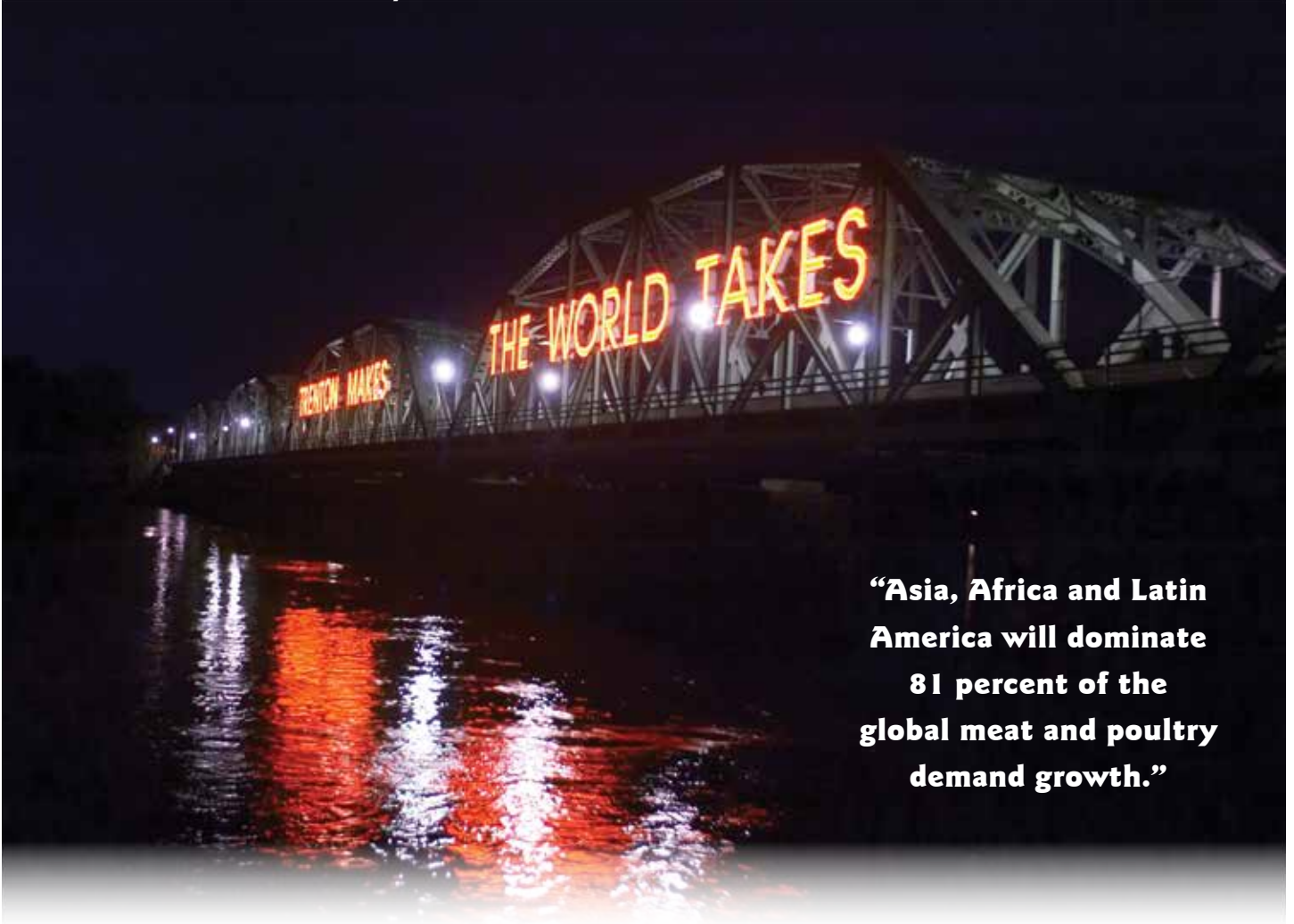
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"If we MAKE it, they will TAKE it"...



"Asia, Africa and Latin America will dominate 81 percent of the global meat and poultry demand growth."

A glimpse into the economic future of the poultry industry

Fact: There's an historic bridge that crosses over the Delaware River connecting Trenton, NJ to Morrisville, PA. Spanning the length of this bridge and in bright red neon letters is a sign that reads "Trenton Makes The World Takes." Of course at the time of its creation, Trenton was known for its strong industrial production, but has since evolved into more of a "taker" than an actual "maker." One thing's for sure, the U.S. Poultry industry is by far one of the world's largest poultry "makers," with Brazil in close contention. What we "make" as an industry, the world will undoubtedly "take," and some experts anticipate that it'll take even more.

In early June, Urner Barry attended USA Poultry and Egg Export Council's Annual Meeting, held in Williamsburg, VA. Among the number of topics discussed was the economic future of the poultry industry. Presenting on this matter was Osler Desouzart, a highly energetic consultant from Brazil and current member of the Advisory Board for the World Agriculture Forum.

Desouzart expects that most of the world's population growth over the next thirty to forty years will in fact take place in Asia and Africa. Not only would there be increases in population, but studies conducted by Desouzart suggested that these countries would also experience steadily rising incomes. So, what will all these people do with their newly found money? They'll eat of course! Being that poultry is the least expensive protein on the markets, for both the grower and the consumer, it's a safe assumption that it will also be the most popular.

Furthermore, Desouzart believes that over the next seven or so years and through 2021, Asia, Africa and Latin America will dominate 81 percent of the global meat and poultry demand growth. That's a whole lot of increase in demand. So, if U.S. Poultry growers are willing to "make it," there's strong belief that the world will continue to "take it," and then some. **UB**

Article contributed by Terence Wells | Twells@urnerbarry.com

Fertilizers, more than just making

Society preaches a strong message: waste is bad, recycling is good. To most people, recycling might mean throwing the bottles into a separate bin from the trash. However, agricultural people know differently. The Earth needs a little help sometimes, and fertilizing is a necessity.

“...the most popular organic fertilizers are composted waste and scraps.”

Fertilizers work because they replenish the earth's stores of macro and micronutrients, all essential to a plant's growth. Organic fertilizers are a great source of these vital nutrients, and we will focus on three here: nitrogen, phosphorous and potassium. Organic fertilizers are, and are made up of, decayed organic matter; whether they are made of plant, meat, fish, or any mixture. Chemical fertilizers are made of synthetic materials, and are much higher in nutrient levels. Fertilizers are labeled with three numbers, each indicating the amount of nitrogen “N”, phosphorus “P”, and potassium “K” per 100 lbs respectively. These numbers can be used to specifically repair certain nutrients. Corn, for example, the primary feed for most livestock and poultry, uses large amounts of nitrogen. The cost of feed often dominates livestock and poultry production, and to sustain the yield needed, a farmer will need to supplement the soil.

The numbers on organic varieties are lower than their chemical counterparts, but are much healthier for the plant. Instead of the quick powerful reaction you get from the chemicals, which leaves the lawn depleted, the organic fertilizers naturally release over time giving the lawn fertility for a significantly longer time—and the unused nutrients stay in the soil. The chemical version is “like candy for the lawn—a quick burst of energy and no real nutrition,” while the organic fertilizers is a hearty meal.

Better hold your nose before you try this meal; the most popular organic fertilizers are composted waste and scraps. One such fertilizer is blood meal, literally dried blood from livestock in packing houses, certainly one of the more unique recycling methods. Liquid fish is also popular, and a classic; the Native Americans used to plant corn seeds in or near a dead fish so that its nutrients would seep into the soil. Poultry

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Things grow

litter compost, another viable option, is a "combination of chicken manure, feathers, and natural bedding...moved into large piles." This creates nutrient rich planting material from the once-living matter.

Corn, an important crop for feeding poultry and swine especially, drains the soil specifically of nitrogen and phosphorus and soil maintenance is necessary to keep yields consistently high, especially if prices of the proteins are to be kept down. For long-term benefits, organic fertilizers are advised, while their chemical counterparts offer a quick fix. The organics promote growth of good bacteria instead of depleting the soil like chemicals, which scare away earthworms and cause the land to require more chemicals in a vicious circle. Either way, Mother Nature could use some help. **UB**

Article contributed by Frank McQuarrie Jr.
Fmac@urnerbarry.com



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More than just an eating experience...

Edible QR codes bring sustainable sushi to life

Diners at the Harney Sushi in San Diego, CA are able to learn all about their dish before they dive in and eat thanks to edible QR (quick response) codes.

When scanned with a smart phone or tablet, the codes take users to the NOAA (National Oceanic and Atmospheric Administration) FishWatch website, where they can learn about the sustainability of the seafood they are consuming. They can see the state of a species' global stock, where their fish was hooked, and even the actual faces of the fishermen behind the catch.

Harney Sushi is one of the first U.S. restaurants to use edible QR codes, which are printed on rice paper with water-based, edible ink. "On the Road With Free Enterprise" writers Nate Hindman and Joe Epstein say that Harney owners, Dustin Summerville and Kirk Harrison, and Executive Chef Robert Ruiz have been working with a number of fishery

stakeholders and NOAA scientists at the agency's Southwest Fisheries Science Center in nearby La Jolla, California, to develop a local economy and culture of sustainable seafood.

The edible QR codes are part of an increasing trend for transparency across the food industry and others, giving consumers confidence in the products they consume,

potentially leading to greater sales, as a recent report found that 52 percent of seafood in Southern California was mislabeled. As word of seafood mislabeling has spread through the sushi industry, and consumers have caught on, Harney and its brand of sustainable fish has taken off. **UB**

Article contributed by Linda Lindner
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The lone star tick is causing meat allergies



Need a reason other than Lyme Disease to avoid ticks? How about having an allergic reaction after eating red meat? Researchers

say that bites from the Lone Star Tick (*Amblyomma americanum*) are making some people allergic to red meat.

The tick is called Lone Star because of a single white splotch on the back of the female. Weeks or months after a bite from the tick, people have reported a new allergy to beef, pork and lamb with a characteristic slow onset; the red meat allergy caused by this tick usually sets in three to six hours after eating, according to *The Wall Street Journal*. Symptoms include vomiting and abdominal cramps, hives, and anaphylaxis, which can cause breathing difficulties and sometimes, death.

U.S. cases of the unusual allergy were first identified at the University of Virginia at Charlottesville in 2007, and are now being reported as far north as Nantucket, Mass., and on the east end of New York's Long Island. Allergy specialists Thomas Platts-Mills and Scott Commins have documented more than 1,000 cases of people who report a delayed allergic reaction to red meat. These individuals all have elevated blood antibodies to alpha-gal, a sugar found in meat, and the researchers think the production of these antibodies is triggered by tick bites.

Dr. Platts-Mills himself even experienced the delayed allergic reaction first hand. In 2007 he returned from hiking in the Blue Ridge Mountains with his ankles covered in tiny Lone Star larvae. His blood soon tested positive for the telltale antibodies to alpha-gal, and he did experience the slow onset of allergic reactive symptoms at a later date, after having consumed meat. The researchers surmise that the delayed allergic reaction occurs because alpha-gal is most concentrated in animal fat, which takes several hours to digest.

Platts-Mills and Commins have presented their research, funded by the National Institutes of Health, at allergy conferences and in a half-dozen medical-journal articles. The researchers now believe that there is something in the tick saliva that causes humans to develop the alpha-gal antibodies, but he says so far no one is sure exactly what that substance is.

"Tick saliva is brilliant stuff—it has loads of substances—but if you ask me which

substances are critical, I don't know. It's something we are working on," Platts-Mills says in an article in *The Wall Street Journal*.

The Journal also reports that fortunately, the allergic reaction seems to fade after a few years in some sufferers if they avoid additional tick bites, and provided that the individual doesn't get bitten again. **UB**

Article contributed by Linda Lindner
llindner@urnerbarry.com

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“We’ve gone and changed breakfast forever. Again...”

Breakfast is often billed as the most important meal of the day. It provides energy, and can make or break a morning. In fact, more and more studies show that eating breakfast helps fight obesity and mid-afternoon crashes while helping the mind and metabolism function at top capacity.

When people think of the fabled first meal they usually think of eggs, bacon, toast, pancakes, and (if they are feeling colorful) some fresh fruit or donuts. All of these might be ingredients to the perfect breakfast, but the ways they are prepared and served are ever-changing.

No doubt, nostalgic tastes presented in innovative ways are huge hits. Grits, biscuits sausage and French toast, or eggs, bacon and pancakes and waffles—oh, and

don’t forget the maple syrup— all these in any shape are truly breakfast classics. Dunkin’ Donuts has been a breakfast staple since 1950, going as far as to say “America runs on Dunkin’.” Their newest creation is a blend of a couple breakfast favorites. The Glazed Donut Breakfast Sandwich includes strips of bacon and pepper-fried egg in a halved glazed donut. If nothing else, this is a breakfast food to get people talking. Jimmy Dean’s Pancakes and Sausage On a Stick is another innovative way to serve breakfast; two staples replacing the classic ballpark corn dog’s ingredients. Another unique idea was just announced from an unlikely source, Taco Bell. That franchise is getting into the breakfast scene with its new “Waffle Taco”—a bent waffle wrapped around a sausage patty and eggs.



Photo: American Egg Board

Eggs’ share of weekday breakfast **has grown to 20%** second only to cereal that declined to 23%
Eggs are #1 in share of weekend breakfast, growing 9% in the last year to 25%

It seems that everything is fair game when it comes to breakfast. However, the breakfast sandwich is still king and more and more fast-food restaurants and frozen brands are carrying these portable powerhouses, perfect for the man or woman on the go.

One thing is for sure, breakfast is all about the energy. Whether going to work, school, or the gym, a person needs sustained energy to make it through their morning. Proteins are much needed, and studies have shown that “if you are trying to lose weight or maintain your current weight, including enough protein at breakfast could help you be more successful without having to feel hungry.” High-protein foods in the morning have proven to fill the consumer up and can give anybody’s metabolism an extra boost. The Center for Culinary Development (CCD) and market research publisher Packaged Facts report that the key to success in the breakfast market is offering “creative breakfast foods...in portable forms and sizes, with better-for-you recipes, and with all new flavors and higher quality ingredients.”

Hitting the “breakfast trifecta” of tasty, healthy, and portable is easier said than done, however. It should be an important source of energy to start the day but not laden with sugar, and portable without being full of sodium. In this day and age, people are realizing that weight loss and healthy diets do not just mean eating less, and that breakfast can be a very healthy and a good way to start the day. **UB**

Article contributed by Frank McQuarrie, Jr.
Fmac@urnerbarry.com

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New front-of-product labeling system

Marketers have joined forces on a \$50 million campaign plugging front-of-pack labeling called Facts Up Front. The Facts Up Front initiative actually began in 2011, displaying stats such as calories, saturated fat, sodium and sugar content, but it was promoted lightly and had little effect on consumer sentiment.

The latest campaign, funded by members of the Grocery Marketing Association and the Food Marketing Institute already has major food companies on board—General Mills, Kraft Foods Group, Mondelez International, Kellogg and Hershey will participate in the program which GMA estimates will include 70 to 80 percent of products from participating companies by year's end. The effort is the latest attempt by processed-food marketers to improve their image.

Facts Up Front is a simple and easy-to-use labeling system that displays key nutrition information on the front of food and beverage packages. Since 2011 the initiative has been rolling out slowly with front-of-pack nutrition labels appearing on dozens of brands, but to date the effort has been lightly promoted.

"Facts Up Front empowers consumers to make informed choices. It arms them with critical nutrition information about their favorite products," said Pamela G. Bailey, President and CEO of the Grocery Manufacturers Association.

Marketers are planning to kick off a campaign next year to explain the new labels, and products bearing the Facts Up Front label are already in stores. In the months to come, you'll see Facts Up Front labels on more and more of your favorite foods.

Visit GMA's nutrition education website, www.factsupfront.org, launched in April

Nutrition Facts	
Serving Size 1 cup (244g)	
Amount Per Serving	
Calories 140	Calories from Fat 45
%Daily Value*	
Total Fat 5g	8%
Saturated Fat 1g	2%
Trans Fat 0g	
Cholesterol 30mg	10%
Sodium 410mg	17%
Potassium 1,000mg	29%
Total Carbohydrate 15g	6%
Dietary Fiber 2g	8%
Sugars 5g	
Protein 9g	
Vitamin A 20%	Vitamin C 5%
Calcium 20%	Iron 0%
* Percent Daily Values are based on a diet of other people's secrets.	
Calories: 2,000 2,500	
Less than 65g 80g	
Less than 30g 25g	
Less than 300mg 300mg	
Less than 2,400mg 2,400mg	
Less than 300g 375g	
Less than 25g 30g	

"Facts Up Front empowers consumers to make informed choices."



"It arms them with critical nutrition information about their favorite products,"

2013, as part of the Facts Up Front Initiative. It offers facts and other resources including a nutrition calculator, shopping and meal planning tips, recipes and an interactive label to explain nutrients and how they impact health.

Article contributed by Linda Lindner | Llindner@urnerbarry.com



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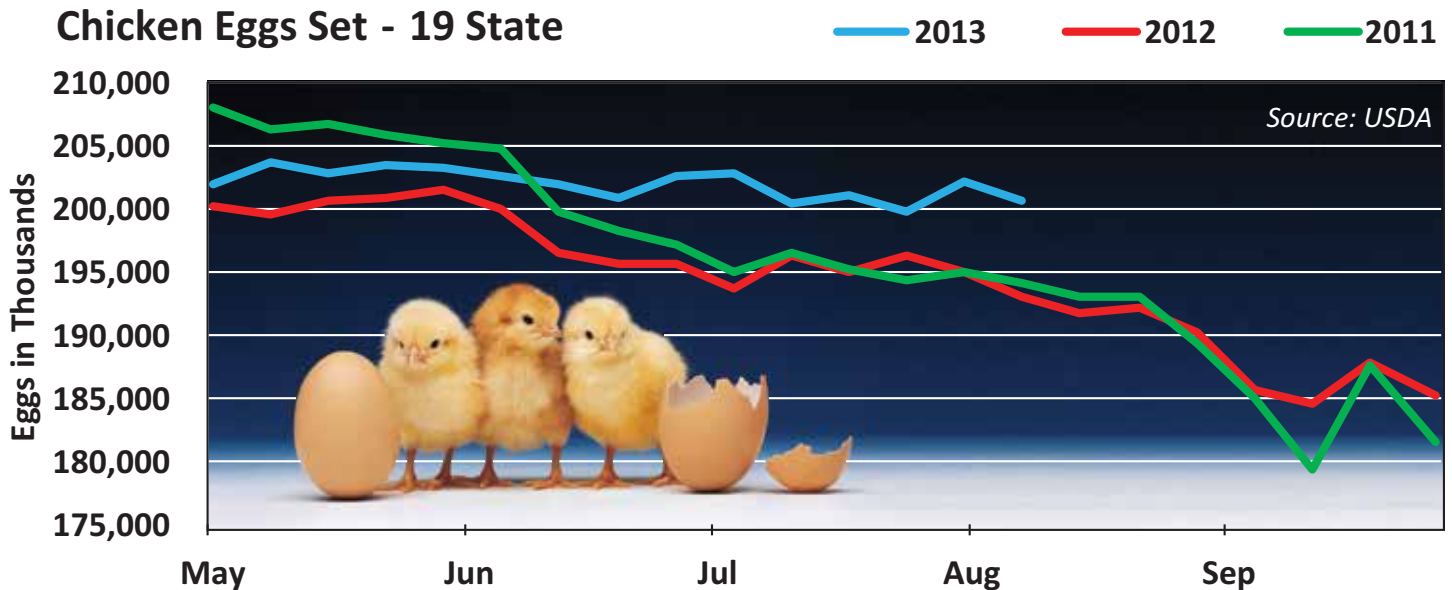
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Counting the chicks before they hatch

There are few better indicators of future production potential than egg sets. Recently, the numbers being reported reflect a noteworthy departure from any recent year and have been raising justified concern about the probability of a forthcoming increase in production. With lower corn prices and a solid 2013 marketing year for the broiler industry, one needn't have a crystal ball to anticipate this critical production development.



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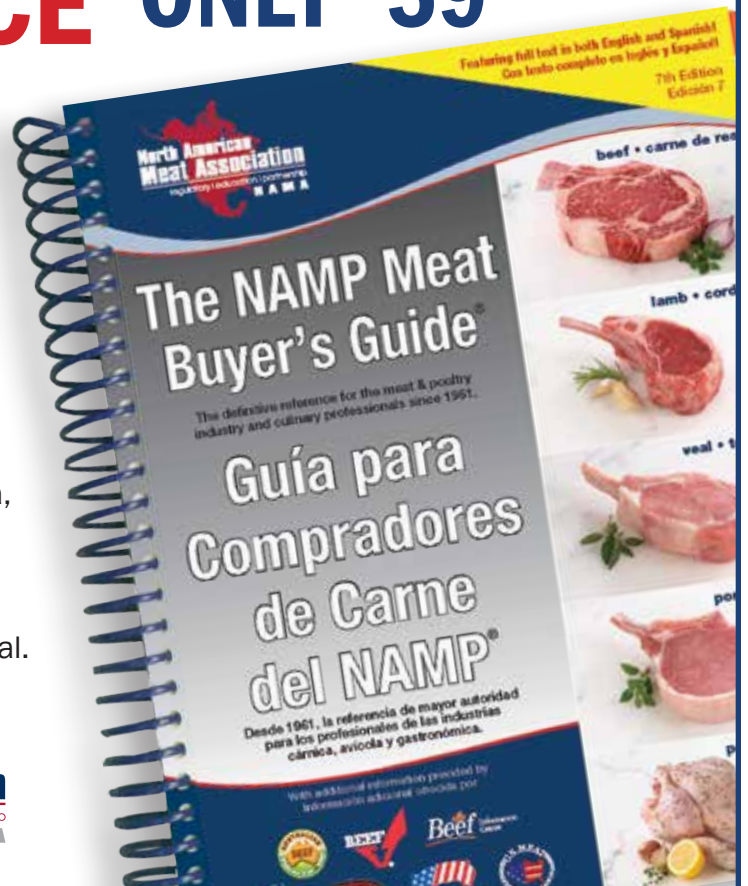
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Name that EGG



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1. _____ eggs are slightly larger and more flavorful than chicken eggs, but also contain a higher level of fat:
A) Quail
B) Duck
C) Pigeon
D) Pheasant
2. This fish lays its fertilized eggs on the sea floor where they stay until they hatch. Sometimes, _____ eggs contain several babies which cannibalize each other before hatching to ensure that only the strongest baby survives.
A) Piranha
B) Anglerfish
C) Tigerfish
D) Shark
3. Similar in flavor to chicken eggs, but much smaller in size; _____ eggs have speckle-covered shells that vary in color from dark brown to blue or white:
A) Emu
B) Turkey
C) Quail
D) Flamingo
4. Female _____ will string their soft, translucent eggs up on overhangs of rock or coral. After laying hundreds of thousands of eggs at a time, she'll stay to guard them against hungry predators until they hatch.
A) Octopuses
B) Alligators
C) Tuna
D) Mahi Mahi
5. One _____ egg is equal to 20 to 24 large chicken eggs. Mainly sold for their uniqueness, these eggs are often used in omelets and as scrambled eggs:
A) Turkey
B) Goose
C) Ostrich
D) Eagle

Prepared by Terence Wells
Twells@urnerbarry.com

See answers on page 67

**Wabash
Valley
Produce**

**Brown
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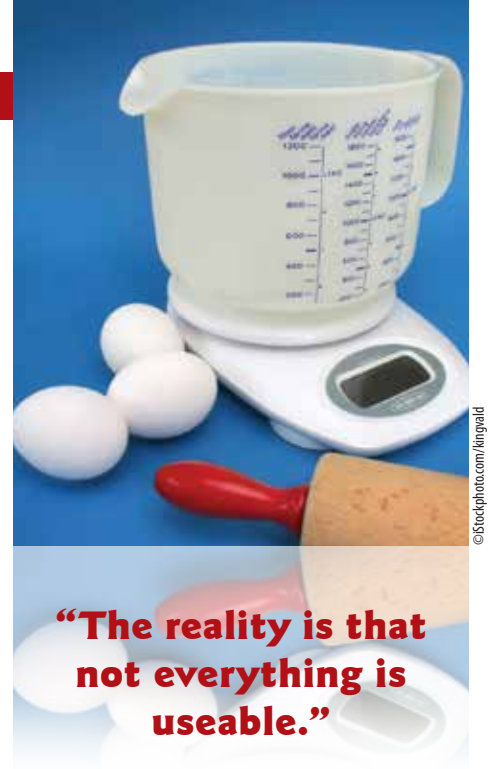
The customer's challenge to obtaining accurate recipe costs

Contributed by By Mark Kelnhofer, MBA
President and CEO of
Return on Ingredients LLC

As a food processor, we sometimes don't realize how our end customer struggles with cost identification. Whether your customer is a restaurant, hotel, casino, school or other foodservice related location, the challenge to identify the proper cost is always there. Especially in times where commodity costs are on the increase or have high fluctuations. It is a fairly accurate assessment to state that current restaurant and foodservice operations do not have accurate recipes costs. Recipe costs are the foundation of much more strategic functions such as the menu engineering process and theoretical benchmarking. Too frequently, recipes are not written to determine accurate costs. They are generally written in cookbook terms and not manufacturing terms. Thinking about a restaurant as a manufacturer is a unique concept and not typically applied. It is a concept that can bring about greater benefits such as improving profits and greater efficiencies.

There are two primary concepts to assist in obtaining accurate ingredient costs. The first is to understand what it means to treat recipes like manufacturers. The basic rule states that anytime a product or production item changes form, no matter how simple it may seem, the costs should be accounted for. The reality is that not everything is useable. Just think about all the applications of loss with the other products we sell (i.e. beef, poultry, seafood, etc.). As an example, seafood can be sold whole or in various stages of processing. Depending on how it is purchased, the customer may need to take the skin off, debone and remove the bloodline of the product and then cut it down to proper portion size. Cutting beef is yet another example where we have a beef short loin that is being cut down to porterhouse steaks. When the initial cut of the loin is done, it is 35 ounces before additional trimming at the purchased cost of \$0.70/pound. Once trimmed, the final porterhouse steak is 27 ounces in portioned trimmed size resulting is cost of \$0.905/ounce before any labor and overhead costs are applied. When working with fine dining and high end restaurants, the recipes can be very complex and the examples above only reinforce the need to account for the known losses and the associated costs.

In addition to accounting for proper yields, the second piece of recipe costing is taking a recipe written by a culinary professional and converting it to proper weights and measures. As an example, many recipes will call out for a spoodle, tablespoon or teaspoon of an ingredient. Utilizing these utensils ensures portion control and proper execution. However, for recipe costing, we need to account for the associated



“The reality is that not everything is useable.”

weights. For example, a one ounce spoodle of feta cheese is not going to be an ounce for costing. When the spoodle of cheese is placed on a digital scale, what you will discover is that the true weight is not close to an ounce (0.3 ounce). Just as accounting for the proper yields is important, it is equally important to account for the proper weights and measures to determine your recipe costing as well.

Accurate recipe costs become the base of many other things such as menu engineering, obtaining theoretical costs and commodity price impacts. Without determining accurate costs, the operation cannot possibly plan properly for success. With the high level of competition in the industry, it would be detrimental not to make the most informed decisions. Some of the emotion of a new menu item needs to be combined with the analytical side to confirm the addition or the removal of an item. Although pursuing a higher level of accuracy may take some initial work and investment of time, it is energy and money well spent in the end. It will assist in improving the profitability of the restaurant operation.

Mark Kelnhofer is the President and CEO of Return on Ingredients LLC and has over 20 years in management accounting experience including the restaurant industry. He is an international speaker on the topics of recipe costing and menu engineering. He can be reached at (614) 558-2239 and Mark@ReturnOnIngredients.com. **UB**

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EVERYTHING POULTRY SINCE 1979

Selling seafood by the kilo and kilobyte

Contributed by Lynsee Fowler,
Communications Coordinator
National Fisheries Institute

Social media isn't just here to stay—it's continuing to grow at a previously unthinkable rate. In just one year (from July 2011 to July 2012) the total time spent on social media in the U.S. increased by 37 percent. Look no further than the floor of the Boston Seafood Show as a reflection of this expansion.

Jason Simas, Director of Communications for iPura Foods, launched a tweet and blog contest in Boston that has seen steady growth since 2011. "Social media users are now able to define a company's reputation as much as the company itself," says Simas.

In the Social Media Examiner's 2013 Social Media Marketing Industry Report 86% of marketers surveyed indicated social media is important for their business. Social media is no longer a nice *addition* to a business' strategy—it's a necessity. But it's not enough to merely be on social media, seafood companies need to be engaging, innovating, and experimenting in order to truly harness the tool to enhance company reputation, and ultimately, profits.

The 24/7, real-time nature of social media is what makes it so appealing to consumers. Product recall? A company no longer has the ability to wait until the next business day and provide a carefully crafted message or its reputation will suffer. According to The Social Habit, 42% of people who contact a company on social media expect a response within 60 minutes.

But these same demanding customers, be they retail consumers or institutional buyers, have the potential to become a company's biggest advocate. New product? Social media veterans have the power to promote a product to their myriad of followers, instantaneously. Not only is it no cost to the company, but time and time again research shows word-of-mouth marketing on social media is more influential than paid advertising

elsewhere. Luckily though, it's not an *either-or* situation.

The same Social Media Marketing Industry Report found that 79% of marketers said they had integrated their social media and traditional marketing activities. During this evolution the National Fisheries Institute (NFI) has done that too, continuing to promote seafood consumption and support public policy using traditional tactics while incorporating new social media tools to amplify NFI messages and ultimately influence an audience. After integrating the two strategies, business and advocacy organizations quickly learn you can never go back.

At the 2012 Boston Seafood Show, NFI sent 6 tweets. At this year's show, NFI sent more than 65 tweets and produced 18 video blogs. In just those 3 days one video blog eclipsed the views of NFI's previously most popular vlog... which had been posted for 6 months.



It's vital for seafood companies to not only have a presence on social media, but have a proactive strategy to build one-on-one relationships with buyers, as well as a reactive strategy to manage any potential crises that would undoubtedly hit the social media sphere. The seafood community is part of a unique industry that has a constant supply of new information regarding science, nutrition, sustainability, and retail trends. Exposing buyers to information they might not be looking for has the ability to enhance a company's profile as not only a supplier, but as a resource.

Like social media itself, customers are constantly evolving and changing the way they consume... not fish... but



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information. Companies that are flexible and open to experimentation with different platforms will discover which ones are most beneficial to their audience, an audience that is ultimately looking to buy seafood whether you sell it to them by the kilo or the kilobyte. **UB**

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CMMA /Scholarship Program 2013 winners

The Chicago Midwest Meat Association has announced its 2013 scholarship winners. A one year scholarship for 12 children of the employees of members of the Association was awarded to be applied toward educational expenses for the 2013-2014 academic school years. This scholarship is renewable for their continued education at a four year college as long as they maintain a B average or better and supply the association with the necessary paperwork for renewal.



To be eligible for this scholarship specific requirements must be met:

Applicants must be a Member of the Chicago Midwest Meat Association

Must be employed with member company for at least one year

Award is for two thousand dollars initially and renewable at the same rate for 4 years of undergraduate study

Payment for subsequent years is contingent upon the student's academic standing and parents continued employment with a member company

To assure complete impartiality in the selection of winners and to maintain a high level of professionalism the CMMA employs a professor from the University of Chicago to select its winners. **UB**

"Award is for two thousand dollars initially and renewable at the same rate for 4 years of undergraduate study."

Scholarship Winners for the 2013-2014 Academic Year

CAITLIN KELLEY ►

Parent Company: Newly Weds Foods
University of Kentucky



ULYANA STARCHUK ►

Parent Company: Quantum Foods
Northeastern Illinois University



LINDSAY TYLER ►

Parent Company: Amity Packing
Indiana University



ALEXANDRIA MELTON ►

Parent Company: Newly Weds Foods
Southern IL - Carbondale



Renewal Applicants: SUSAN PIOTROWSKI

Parent Company: Trim Rite Foods
North Central College

ALICE FOLTYN

Parent Company: Rose Packing
University of Illinois/Urbana

LUKASZ SZCZESNIAK

Parent Company: Quantum Foods
Lewis University

OSCAR CAHUE

Parent Company: Newly Weds Foods
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Parent Company: Lincoln Provisions
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Egg white prices

Continued from page 1

whites had already been clearing well into the retail and foodservice channels in other prepared foods and in ready to cook liquid form like Egg Beaters.

Urner Barry's standard, unpasteurized liquid white quote climbed \$0.20 in the first quarter of the year, a seasonal type move that exceeded the previous five year average for the period by more than 28%.

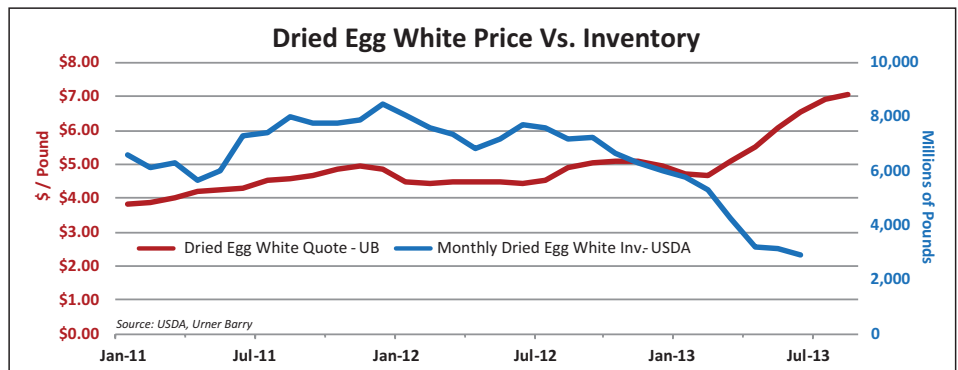
It appeared the run may have ended but the success of the McDonald's Egg White Delight and unseasonably high cost of breaking eggs prompted continued orders and price advances. From April to the end of June, the category climbed another \$0.11 or 17.5%. This doesn't seem like much in comparison to the first quarter run, but when you look at the five year average, these levels were higher by more than 76%.

RECORD DRY PRICES

Input costs and availability of raw materials quickly carried over into finished products. Exports and other opportunities in the domestic carton market kept breaking egg prices unseasonably high during the front half of the year, limiting opportunity to replenish dried inventory depleted over the previous fourth quarter. Urner Barry's dried whites quotation dipped slightly through late February, before climbing roughly 15% from there through the end of the first quarter.

Buyers were hesitant during this period, citing costs which had reached more than a dollar per pound higher than the previous five year average. Sellers not only held these levels firmly, but increased them over the next four months, still unable to build inventory. Dried whites soared more than 31% by the end of June, exceeding the period's five year average by more than 64%. Upwards of \$7.00 per pound, whites shattered the previous record hit in 2004, the period associated with the popularity of the Atkins Diet. June inventories hit the second lowest level ever recorded for the month.

Those failing to cover their needs out front were forced to pay substantial premiums to levels anticipated earlier



in the year. This affected input costs of a number of products using dried egg whites as an ingredient, leading some to look at alternatives in their mixes. Several report renewed interest in gums and other binding agents, which may be cost efficient alternatives, but often lack the taste and texture of egg whites, not to mention these alternatives affect a product's protein content and ability to be marketed with a "clean" label. Market participants close to the situation state that some will simply remove products using dried whites as a major ingredient all together, at least until prices moderate.

Dried white inventories are yet to show any sign of a rebound and liquid demand remains steady. The success that QSRs have had with their egg white offerings has opened the eyes of multinational companies who are already beginning to experiment with similar products abroad. Domestically, breakfast menu innovations continue to highlight egg whites, this at a time when McDonalds mulls an all day breakfast menu off the heels of their Egg White Delight launch. **UB**

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112 Beef Round, 113 Beef Loin, 114 Beef Rib, 115 Beef Brisket/Plate/Flank, 116 Beef Chuck, 117 Beef Shoulder, 118 Beef Shank, 119 Beef Bone-in, 120 Beef Boneless

Unemployment

Continued from page 1

checks in order to pay for groceries, the unemployment rate can be hugely important. (See chart 1)

We know the official unemployment rate calculated and provided by the Bureau of Labor Statistics is down 2.6 percent since its recent high in 2009. However, let's take a look at some of the internals

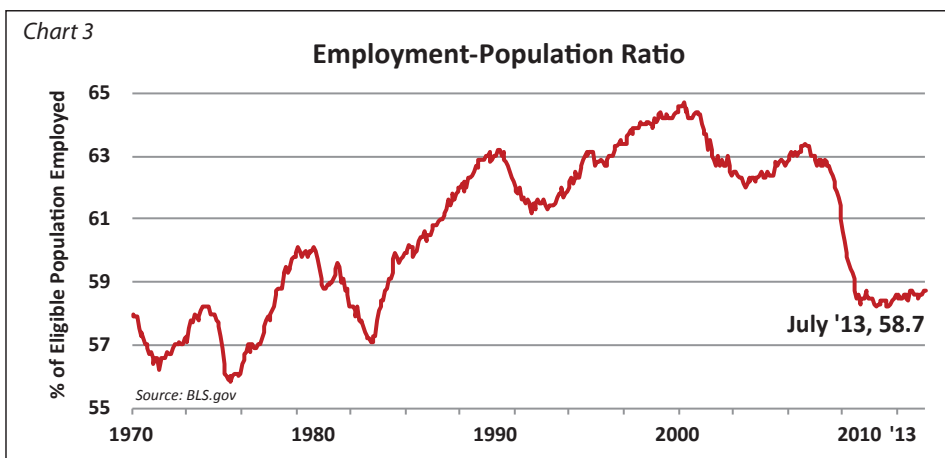
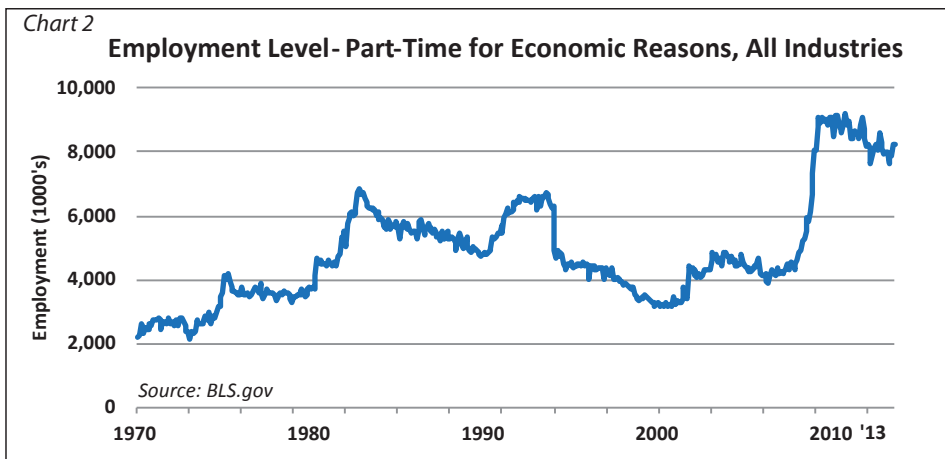
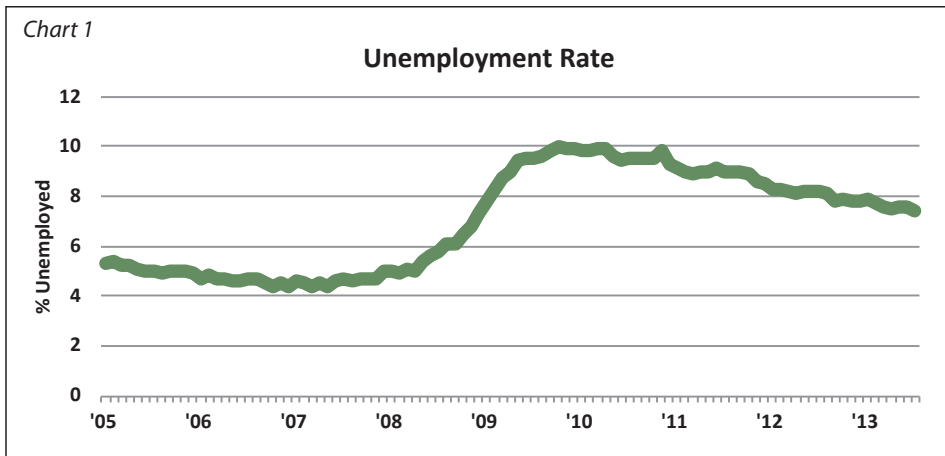
of the labor situation in the United States to see if everything is as positive as the headline number.

First, there is a certain "quality" that has to be taken into account when talking jobs. 100 part-time jobs (for the most part) are not going to produce the same income and economic weight as 100 full-time jobs. So ideally, we'd like to see both part-time and full-time jobs increasing as the

labor market improves. What we've seen instead is an explosion in part-time jobs and generally lackluster growth of more permanent employment. The possible political or fundamental dynamics causing this we won't discuss here. However, what is concerning is a statistic the BLS calls "Employment Level - Part-Time for Economic Reasons, All Industries." This figure skyrocketed during the recession from around 4 million people in early 2007 to over 9 million people in 2009. In July of 2013, the number of people that qualified for this category was 8.24 million. Since 1970 and prior to the recession, the previous high was 6.85 million people. (See chart 2)

Now, because the population is constantly growing and an increasing amount of people are entering that 16+ age range where the government considers them eligible for work, let's examine how employment compares to the working age population as a whole. We can do that with what the BLS coins the "Employment-Population Ratio." Employment as a percentage of the work-eligible community went from 62.7 percent in October of 2007 to a low of 58.2 in November of 2010. Since then, we've only found jobs for another .5 percent of the work eligible population, with a July 2013 figure of 58.7 percent. (See chart 3)

Another Federal institution that collects employment data is the St. Louis Fed; which becomes of particular intrigue as they divide employment and wages by job role as well as by age. Every month we hear about a certain number of new jobs added. However, what isn't immediately obvious is what types of jobs are created, and for whom. There are certain industries that we associate primarily with part-time work; namely retail and foodservice. However, compared to the politician and middle class favorite "manufacturing" jobs, they are hardly ever mentioned. With a look at the data, we can see that whereas there were 10,000 jobs added to what the St. Louis Fed considers the manufacturing field in 2013, the foodservice industry added 227,700 jobs and retail outlets added 164,500 jobs. As of July, foodservice jobs had average hourly wages of \$13.48, retail \$16.58 and manufacturing \$19.28/hr. So yes, the amount of jobs



increased, but what can be said of the quality of these new employment opportunities and what can be expected of these employees when it comes to buying protein products? (See chart 4)

One final aspect of the unemployment figure that needs consideration is the question of who exactly is getting the jobs. With the massive amount of layoffs that came during the recession, a pool of unemployed, experienced professionals formed who had important obligations that required an income. Over the past few years, we have seen members of society forfeit the size of their salary just to be employed. Similarly, we've seen employers realize that they can choose between a younger, less experienced person or an older, more experienced person for often very similar salaries. In addition, many of those older people with a job unfortunately came away from the crash in 2007-08 with a retirement account and home value significantly damaged, requiring them to put off retirement longer. The chart entitled "Total Jobs Added by Age Range Since 2005" displays these factors, and is perhaps one of the most dramatic comparisons one could draw out of employment data. Since January of 2005, jobs created and populated by people 55 years and older increased by roughly 9 million. In that same period, everyone else lost approximately 5 million jobs. (See chart 5)

Essentially, even though we have certainly seen the official unemployment rate decline, the headline may not be the entire



story. We now have to wonder whether this surge in part-time, low paying jobs and fiscally responsible, retirement-focused, but still working community of 55 and overs, could filter its way into protein sales. **UB**

Article contributed by Russell Barton
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Chart 4
2013 New Jobs (Jan - July)

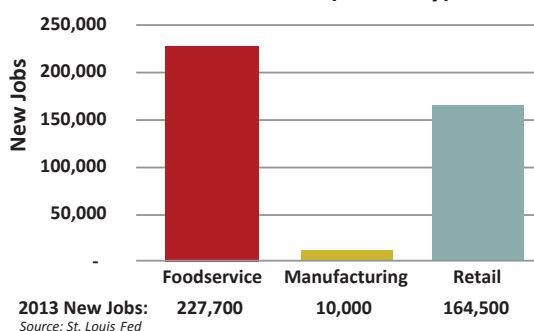
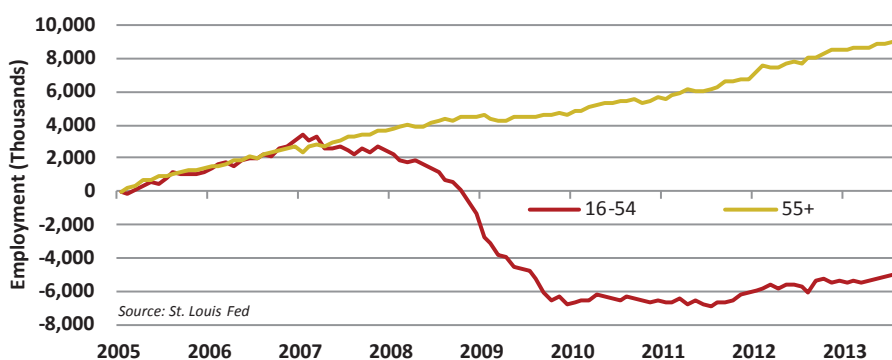


Chart 5
Total Jobs Added by Age Range Since 2005



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Answers to the quiz on page 59

1. B Duck
2. D Shark
3. C Quail
4. A Octopuses
5. C Ostrich

Urner Barry's Reporter (ISSN 1944771X) is published quarterly by
Urner Barry Publications, 182 Queens Blvd., Bayville, NJ 08721.
Periodicals Postage Paid at Bayville, NJ 08721 and additional offices.



The advertisement features a blue background with a wavy pattern. In the center is a logo for "prairie natural" with a fish jumping over waves and a banner below that says "PREMIUM SEAFOOD". To the right is a circular seal with a scalloped edge that says "100% Natural" and "Premium Seafood". Below these elements is a photograph of several large, pinkish-white fish fillets on a white plate, garnished with green herbs. In front of the fillets are two blue and white boxes of "prairie natural" seafood. At the bottom of the advertisement is a blue banner with white text.

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