

URNER BARRY'S Reporter

VOLUME 9 / NUMBER 1 / WINTER 2014 / QUARTERLY

the newsmagazine for the food industry professional



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PEDv: How much will it affect U.S. hog supplies in coming months and year ahead?

The porcine epidemic diarrhea virus (PEDv), which was confirmed to be in some U.S. swine operations in May and subsequent tests have shown the earliest known case occurred in mid April, could have a significant effect on hog supplies in the weeks and months ahead.

Slaughter-ready hog supplies have not been affected much yet because the disease affects mainly very young pigs. Although PEDv has a high mortality rate, the shortfall in supplies will not be fully felt until the remaining pigs reach slaughter weight, which takes about six months from

birth. However, the impact of the disease is expected to show up soon, yet no one knows for sure the numbers of pigs that were killed since PEDv is not classified as a reportable disease, therefore neither producers or veterinarians are required to report cases or death losses to state or federal animal health officials.

In some cases on the large operations, thousands of pigs have been killed by the disease, according to anecdotal reports. Since PEDv was not in the U.S. swine herd until this year, the sows had no natural immunity to the disease so the pigs were

highly vulnerable to it, and the virus swept through farrowing facilities, killing large numbers of pigs in a matter of just a few days. These reports have led to projections by some analysts that slaughter-ready hog supplies could be reduced at times by anywhere from 2% to as much as 7% from what would have been available had there been no outbreaks of the disease.

PEDv has been found in many parts of the world including Europe and Asia. A vaccine is used to help fight the disease in

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Poultry facility big part of an era of economic growth ...



Farbest Foods Vincennes Ribbon Cutting. Officials and guests ushered in the opening December 2, 2013 with (l-r) Farbest Foods President Ted Seger, IN Lieutenant Governor Sue Ellspermann, and Vincennes Mayor Joe Yochum.

Farbest Foods celebrates opening of new turkey processing plant

In early December, 2013, a month ahead of schedule and right on budget, officials cut the ribbon at Farbest Foods' new turkey processing plant in the Vincennes Industrial Park in Indiana.

At the event, Lieutenant Governor Sue Ellspermann, Farbest Foods president Ted Seger and Vincennes Mayor Joe Yochum made remarks before the ribbon-cutting, which was followed by interviews with the media and tours of the new plant.

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On the inside



5 Charles Urner - beyond agriculture.

A grandson of one of Urner Barry's founders and a man of many talents.



16 California egg producers have a lot on their plate.

Only time will tell how the whole situation will play out.



58 Urner Barry foodies bite into burgers.

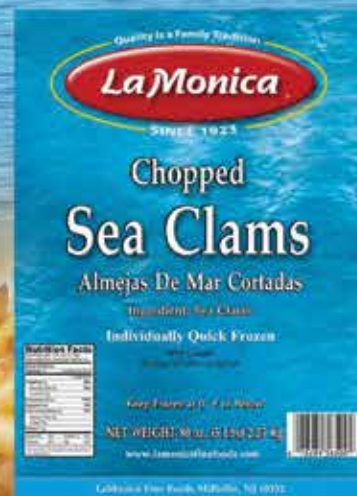
Taste test shows how different offerings stack up against the traditional beef hamburger.



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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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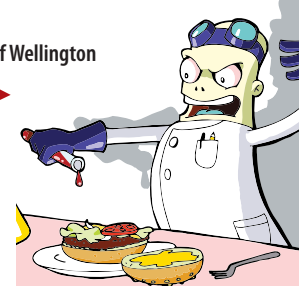


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Advancing pet food demand and struggling economy boost MSP

It's no secret that our economy has been under pressure for quite some time now, but even when finances are tight, people still eat, right? Okay, maybe that's being a little over dramatic. Of course people will still eat, but there's no way of hiding the fact that consumers are being more careful with their spending.

So, instead of springing for that lobster or steak dinner, many consumers are choosing the practical and less expensive route to supplement protein into their diets. Products that are ready-to-eat such as hot dogs, bologna and other luncheon meats have become a popular choice amongst consumers as they stretch their food budget dollar. But, during these difficult times, what exactly are we choosing to feed our pets?



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These days, owners are treating their pets more and more like they're a part of the family and when it comes to feeding them, only the best will do for man's best friend or feline companion. If this means spending a little extra money for that "all natural" diet or for the pet food that contains "real meat," then that's exactly what today's pet owners are going to do.

If you take a look in the local supermarket nowadays, you'll no doubt find a refrigerated section displaying pet food of all shapes, sizes and flavors. Read any of the product labels and there's a good chance that you'll see "chicken," "turkey," or "mechanically separated" variants listed as the main ingredient. Mechanically separated poultry also happens to be the one of the most commonly used ingredients in our everyday fully cooked and ready-to-eat products. So what exactly does all this mean for buyers and sellers of this widely used raw material?

Since 2007, the Urner Barry average yearly quotation for mechanically separated

turkey (MST) has increased by over \$.13/lb., or 54%. Similarly, mechanically separated chicken (MSC) has gone up in value by over \$.14/lb., or 82%. So, not only are manufacturers purchasing more MSP in a variety of forms for human consumption, but they're also purchasing more to satisfy the growing pet food ingredients demand to feed our furry little friends.

With that being said, how many more hot dogs are we actually consuming and is it really enough of an increase to boost MSP values this much? Can it be that it is more the combination of a struggling economy and an overwhelming desire to treat our pets like family? Certainly, manageable poultry production levels also play a role. One thing's for sure, in this economy as long as the pet food industry continues to market the importance of "real meat" in our pets' diets and consumers continue to seek out low cost proteins, the newly reached record high values for MSP could be here to stay. **UB**

Article contributed by Terence Wells
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Charles A. Urner

A Renaissance man in U.S. agriculture

I would like to have met this man, Charles A. Urner, a person of many talents and interests who contributed much to the agricultural community and to all having an interest in nature.

Charles was the grandson of Benjamin Urner, founder of what would first become Urner Publishing Company and later the Urner Barry Company. Benjamin's initial market reports, known as "Producers' Price Current" reports, emerged four years before President Abraham Lincoln established the U.S. Department of Agriculture in 1862.

Charles, like his father, Frank G. Urner, learned the business of agricultural market reporting and publishing from the ground level as he joined the firm in 1889 as a market reporter when he was not yet 20 years old. Charles understood the markets, the need for fair and impartial price reporting and held firmly to those principles. Charles would eventually become vice-president of the company and broaden his influence and that of the Urner Barry Company even further throughout the agricultural industries.

But, Charles' legacy goes well beyond the scope of the agricultural markets.

A love of nature drew him to the study of birds and what became a passion throughout his life. Perhaps the detailed record keeping that he learned as a market reporter and inherited from his father and



Picture Frame Photo ©iStockphoto.com/LightScribe

grandfather enabled Charles to be one of the most prolific compilers of information on wild birds of his generation. He held the amateur record in 1935 for bird identification in the East, spotting 170 different species in a single day in his home state of New Jersey. Mr. Urner was also active in the National Association of Audubon Societies, the New Jersey Audubon Society, and other ornithological groups. His works continue to be a source of education and encouragement to bird watchers long after his untimely passing in 1938.

Mr. Urner wrote a book on birding, "Birds of Union County N.J. and the Immediate Vicinity—A Statistical Study" and contributed information or illustrations for several others, some of which have just recently been released. He also wrote poetry and published a book of Christmas poems.

The devotion of Mr. Urner to the study of birds, the identification of species, migration routes and habitat preservation has lived on through the generations. Following his passing, the Ornithological

Club of New Jersey honored Mr. Urner by naming their organization after him and it became known as the Urner Ornithological Club. Tim Vogel, president of the organization, said members of the group still refer to him as Mr. Urner out of respect for him and his efforts.

Mr. Urner also served as president and as secretary of the Linnaean Society of New York, a club of amateur and professional naturalists founded in 1878. The Society conducts field trips, generates a newsletter and holds programs on natural history. Over the years, the organization has focused mainly on birds. Mr. Urner was on his way home from a meeting of the Linnaean Society when he had a fatal heart attack, Vogel said.

After Mr. Urner's death in 1938, the Linnaean Society initiated a memorial scholarship in his name, "for the promotion of field ornithology in New Jersey, New York and Connecticut for publication of studies made in these areas."

Mr. Urner's fascination with birding included making plaster casts of various bird tracks then using those to make concrete walking stones for his garden, so that each stone had a unique bird track. It is believed to be the only one of its kind. After his death, his widow donated the walkway to Union County Park Commission for others to share the enjoyment of the 'bird' walk.

Mr. Urner's grave is in Hillside, N.J., and the location is ideal for bird watching, Vogel said.

Naturally.

I wish I had met the man. **UB**

Article contributed by Curt Thacker
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"...the detailed record keeping that he learned as a market reporter ... enabled Charles to be one of the most prolific compilers of information on wild birds of his generation."

Record egg market for Thanksgiving

Urner Barry has been quoting the shell egg market since its inception in 1858, so when the market hit record highs ahead of Thanksgiving this year many looked for a single reason as to why.

If you asked someone to describe how shell egg prices move, the simplest answer would be that they follow cyclical factors. In fact, there are six main holidays which affect egg prices positively and negatively. Labor Day, Thanksgiving, Christmas and Easter typically boost demand while Memorial Day and the 4th of July can

usually be more difficult sales periods. It is no coincidence that the market responds better to cooler temperatures, as consumers turn to warmer breakfast options.

There are a number of outside factors which affect the market though; several that we've seen come into play over the last few years. Exports, features, production changes, recalls, inventories, and PR stories, to name a few.

In 2013, Midwest large egg prices increased from \$1.20 a dozen from the middle

of October to begin the week of the Thanksgiving holiday at a record level of \$1.69, a 40.8% rise. There was however not a single main reason that this lofty level was achieved, rather a mixture of some of the aforementioned market movers.

The peak was at least partially set up by low dried stocks in the first half of the year. Processors really never had the ability to build inventory due to strong call for egg products, both domestically and abroad. In fact, liquid egg white prices also hit record highs in 2013 on interest from Quick Service Restaurants (QSRs); most notably McDonalds' launch of their Egg White Delight sandwich. The situation left processors in the market for breaking eggs not only through the summer, but into the holiday period. This is evident in the spread between large and breaking stock, which typically bottoms sometime in September before rallying through the end of the year. In 2013 though, the low proceeded through the end of October, allowing shell eggs to move into either channel.

Exports also played a role, but it wasn't just to Mexico as most may have expected. Canada also pursued U.S. supplies of shell eggs. In total, egg exports increased more than 8% during August and September of 2013 when compared to the same period a year prior, further tightening preholiday supplies.

Domestic retailers are the main drivers in any holiday market. Many especially plan robust feature schedules around the winter

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***"When an item that
has been quoted for
over 150 years reaches
all-time highs, market
participants want to
know why."***

holidays, but volumes can often fail to reach expectations when prices advance. Margins quickly deteriorate in a rising market, affecting both the attractiveness of ad levels as well as overall volume. Most planners remained steadfast ahead of Thanksgiving this year however, and not only were volumes better than anticipated, but price points were kept down as several major chains used large shell eggs as a loss leader.

These factors motivated wholesale buyers through the period. Not only were they building inventory of their own for the holiday, but they were also filling feature related orders and competing with export buyers and further processors for supplies.

During the week of Thanksgiving, the national shell egg inventory was reported by the USDA as 956.3 thousand cases, down 16.6% when compared to the week of Thanksgiving a year prior. The total shell egg inventory was 1,187.6 thousand cases, down 15.7% when compared to 2012. One thing to consider here though is that there was also a short supply of brown eggs during the period, which are included in the inventory report. Midwest large browns averaged \$0.50 more per dozen in November of this year than in 2012.

Layer numbers didn't seem to factor much in the record price, though the flock did take a surprising two million bird dip between the beginning of September and

the beginning of October. It rebounded to similar levels seen in 2012 to start November, which was actually a good level considering 2013 levels were around five million birds higher than 2012 for most of the year.

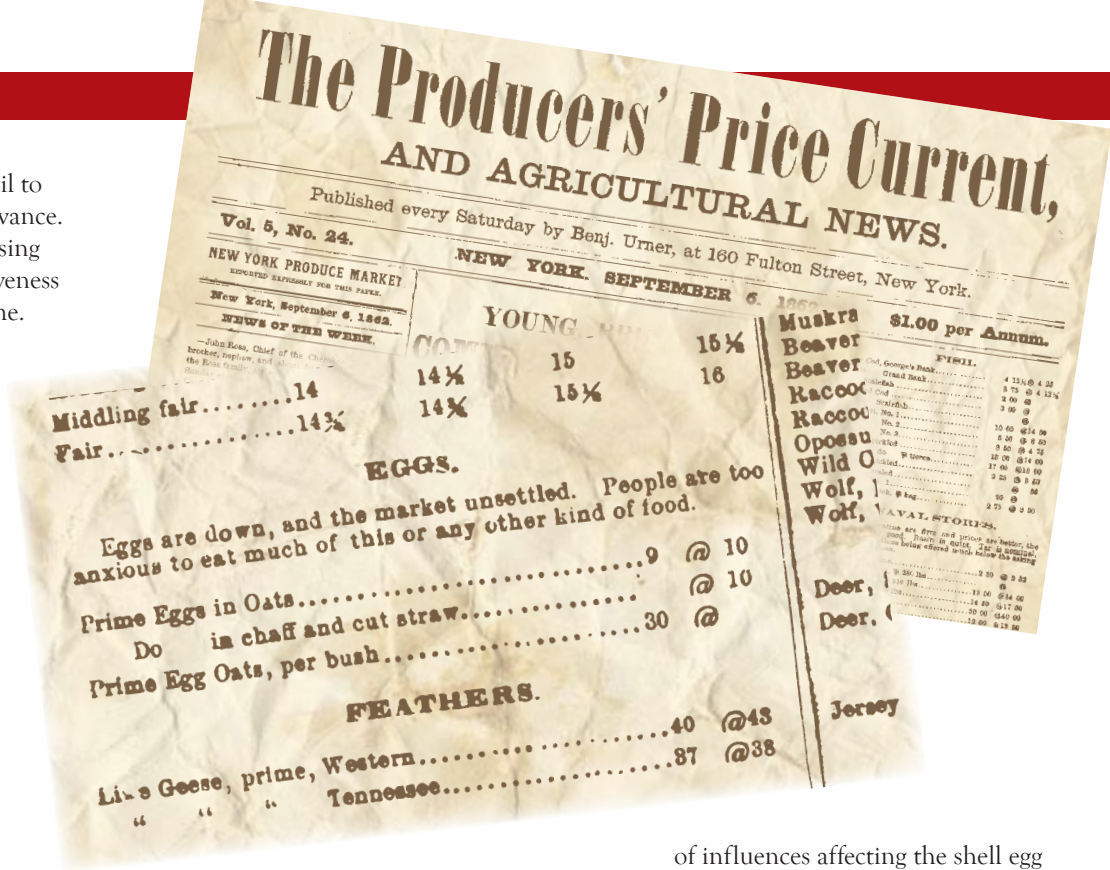
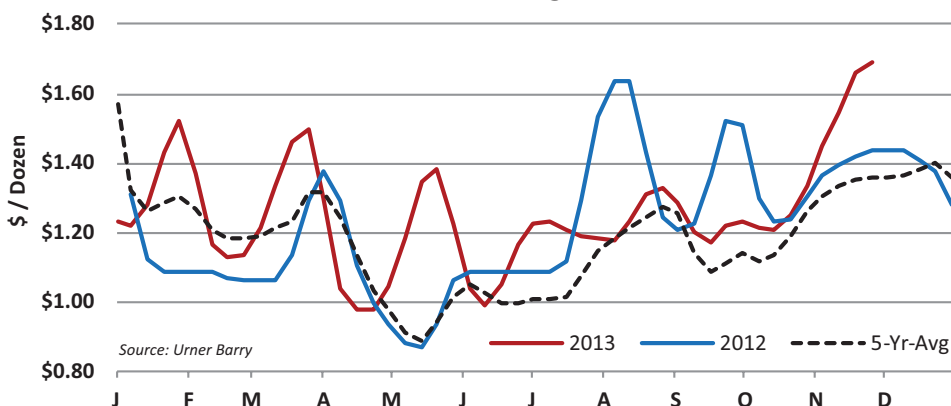
Thanksgiving fell very late this year, a full week later than in 2012. This set up a short turnaround period between then and the remaining holidays. Retail buyers may have taken an early position for those needs as well.

When an item that has been quoted for over 150 years reaches all-time highs, market participants want to know why. There was not one main reason for the Thanksgiving peak this year, but a variety

of influences affecting the shell egg market through the year which forced Urner Barry's quotations to these levels.**UB**

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UB Midwest Large Quote



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Soaring shrimp prices shake up consumer consumption

The National Fisheries Institute released its annual list of the top ten seafoods eaten in the U.S., based on NMFS consumption figures.

Overall, Americans ate .4 lbs less seafood in 2012 than in 2011, with per capita consumption falling four percent.

"Population growth certainly factors into this but we want to see the numbers heading in the other direction," said Jennifer McGuire MS RD, NFI's nutrition communications manager. "There is an important message in seafood

"The main news from the listing was whitefish surpassing shrimp as the largest single seafood category."

NFI's 2012 Top Consumed Seafood Items

	2011	2012
Shrimp	4.2	3.8
Tuna	2.6	2.4
Salmon	1.95	2.02
Pollock	1.29	1.17
Tilapia	1.29	1.48
Catfish	0.56	0.5
Crab	0.52	0.52
Cod	0.5	0.52
Clams	0.31	0.35
Pangasius	0.5	0.73

Source: National Fisheries Institute

consumption trends for public health professionals; when the amount of fish people eat goes up, ailments, medical costs and preventable deaths will go down."

The main news from the listing was whitefish surpassing shrimp as the largest single seafood category.

Whitefish consists of cod, pollock, tilapia, pangasius, and domestic catfish. Combined, consumption of these items soared 6.2 percent, while shrimp fell 9.5 percent. As a result, whitefish as a category now is higher than shrimp for U.S. per capita consumption. The growth in whitefish is driven by tilapia and pangasius. Cod saw a small increase, while pollock and domestic catfish declined. Cod growth should continue in 2013, as it will be attractively priced compared to other seafoods.


Salmon consumption rose 3.5 percent, and at around 2 pounds per capita, it is almost exactly where it was in 2001. In 2012, it was an off year for pink salmon, and so Alaska's catches fell. The fact that consumption increased was due to strong demand for farmed Atlantics.

The shellfish category includes clams and crab. We do not have separate data on scallops, mussels and oysters. One notable change is that for the first time in five years, crab consumption began to increase again. It had been on a steady decline since 2007.

"The top ten most popular fish make up a little more than ninety percent of all the fish Americans eat," said NFI President John Connelly. "It's a fairly stable list but we see a slight increase in salmon consumption and an increase of about 15-percent, combined, in pangasius and tilapia so there is growth in certain areas." **UB**

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Adapted from a posting on Seafood.com News on November 1, 2013 by John Sackton




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Regal and worldly

Beef Wellington

Beef Wellington is one of those classic dishes that everyone seems to recognize but that we actually know so little about. The fact that this somewhat secretive dish is cloaked in pastry seems very fitting. The origin of the name is open to some debate but it's generally understood that the dish was named after Arthur Wellesley, 1st Duke of Wellington. If this is fact, it was done to honor a Field Marshall, our Mr. Wellesley, for his role in helping to defeat Napoleon Bonaparte, sending him to exile one final time. This seems reasonable as chefs would often create dishes to pay tribute to a war hero. So why not a rich, decadent beef dish to honor this military hero? On the other hand the evidence is on the scant side and there are few supporting facts to even suggest that Mr. Wellesley had a fondness for mushrooms, wine or pastry.

What chefs can agree on is that this classic preparation of beef tenderloin encased in pastry dough is elegant and focuses everyone's culinary attention when it's brought to the table. At root is a beef tenderloin fillet which in the *Urnner Barry's Reporter* recipe is coated in mustard, wrapped in ham spread with a mushroom mixture, and then encased in pastry and baked. Sometimes this dish is made with individual slices of beef being wrapped and then baked. This traditional name, "Wellington," is sometimes informally used to describe other dishes in which meat is baked in a puff pastry.

Whatever the variation, Beef Wellington is a classic dish that can be prepared in an afternoon, and is sure to impress even the most discriminating tastes! Enjoy. **UB**

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Recipe prepared by **Rusty Dean** | Rusty@urnerbarry.com

Photograph by **Caroline Hirt**

Recipe adapted from a Beef Wellington recipe by Chef Gordon Ramsey from Simply Recipes <http://www.simplyrecipes.com>

BEEF WELLINGTON

PREP TIME: 10 MINUTES

COOK TIME: 2 HOURS

YIELD: SERVES 4

INGREDIENTS:

1 lb beef tenderloin fillet
Salt and pepper
Canola, grapeseed, or olive oil
1 lb mushrooms (we used half cremini, half shiitake)
4 thin slices ham (Parma ham if you can get it) or prosciutto
2 Tbsp yellow mustard (we used Coleman's Original English Mustard)
7 ounces puff pastry (needs 3 hours to defrost in refrigerator if using frozen)
2 egg yolks, beaten

METHOD:

- 1 Preheat oven to 400°F.
- 2 Heat a tablespoon or two of oil in a large pan on high heat. Season the fillet generously with salt and pepper. Sear the fillet in the pan on all sides until well browned (hint: do not move the fillet until it has had a chance to brown). Remove the fillet from the pan and let cool. Once cooled, brush the fillet on all sides with mustard.
- 3 Chop the mushrooms and put them into a food processor and purée. Heat a large sauté pan on medium high heat. Scrape the

mushroom purée into the pan and let cook down, allowing the mushrooms to release their moisture. When the moisture released by the mushrooms has boiled away, set aside the mushrooms to cool.

- 4 Roll out a large piece of plastic wrap. Lay out the slices of ham on the plastic wrap so that they overlap. Spread the mushroom mixture over the ham. Place the beef fillet in the middle, roll the mushroom and ham over the fillet, using the plastic wrap so that you do this tightly. Wrap up the beef fillet into a tight barrel shape, twisting the ends of the plastic wrap to secure. Refrigerate for 20 minutes.

- 5 On a lightly floured surface, roll out the puff pastry sheet to a size that will wrap around the beef fillet. Unwrap the fillet from the plastic wrap and place in the middle of the pastry dough. Brush the edges of the pastry with the beaten eggs. Fold the pastry around the fillet, cutting off any excess at the ends (pastry that is more than 2 layers thick will not cook all the way, try to limit the overlap). Place on a small plate, seam side down, and brush beaten egg yolks all over the top. Chill for 5-10 minutes.

- 6 Place the pastry-wrapped fillet on a baking pan. Brush the exposed surface again with beaten eggs. Score the top of the pastry with a sharp knife, not going all the way through the pastry. Sprinkle the top with coarse salt. Bake for 25-35 minutes. The pastry should be nicely golden when done. (To ensure that your roast is medium rare, test with an instant read meat thermometer. Pull out at 125-130°F for medium rare.) Remove from oven and let rest for 10 minutes before slicing. Slice in 1-inch thick slices.



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College degree: costs versus value

It's the old adage that each generation wants the next to do better than them, with parents working hard to achieve this. Educational attainment is a big part of this goal as 94% of parents expect their child to go to college, according to a survey by the Pew Research Center. However, with student loan debt surpassing \$1 trillion dollars, Americans now owe more on student loans than on credit cards, moving student loans to second behind mortgage debt on what Americans owe creditors. This has forced a generation to delay starting families or purchasing homes. The debt, coupled with a stagnant job market, has sparked a national debate about

whether a college education is worth the skyrocketing costs.

On one side of the aisle, many are saying that the costs outweigh the benefits. Besides the monetary costs, which continue to climb higher, there is the opportunity costs of investing the money used for college, which could grow significantly greater than those that put off investing for many years. In addition, there is four years of job experience that is lost. The other view points to greater lifetime

earnings associated with more education as well as the social benefits that the college experience affords, among other things.

No matter what side of the fence you are on, let's focus on the latter: getting a college degree. Choosing the correct major could potentially take the bite out of the economic argument of the other side. Supply and demand fundamentals we are all used to comes into play for human capital as well. Looking at the table attached, you can see that 9 out of the top 10 average starting salaries come from the STEM (Science, Technology, Engineering, and Math) degrees. These graduates are in greatest demand but in short supply. The final degree from the list is finance. Many of the best and brightest go into this field. But Jim Rogers, a well-known investor and author in the field, believes there is an area that offers more promise than finance, and that is agriculture.

Mr. Rogers was quoted on CNBC.com saying, "If you've got young people who don't know what to do, I'd urge them not to get MBAs, but to get agricultural degrees." He believes the center of the world is going to be the producers of real goods. Further evidence on the future of the field is highlighted by Timothy Burcham, Dean of Agriculture and Technology at Arkansas State University. He states, "we are going to be trying to feed 9 billion people by 2050 with the same number of acres of arable



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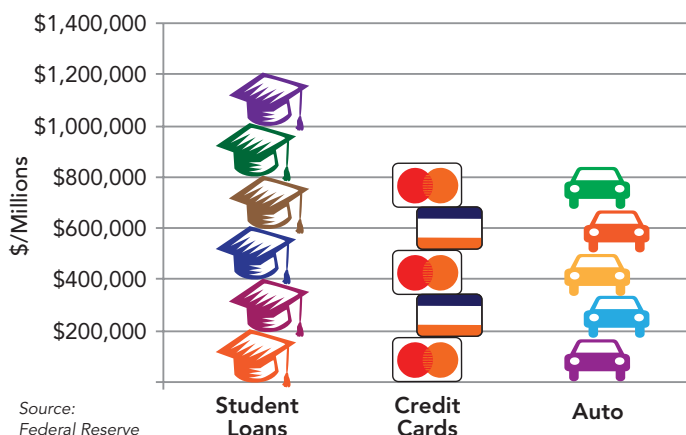
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land,” and further said “the opportunities for a person that has a graduate degree in agriculture are great now, but they are going to be really, really excellent going into the future.”

The field is growing and jobs are expected to increase. There are many professions within the field to choose from, as shown in the table of agricultural related professions. And as we saw with other degrees, the more demand for these people, the more companies are going to be willing to pay. **U**

Article by Gary Morrison | Gmorrison@urnerbarry.com

Outstanding Consumer Debt



Major

Avg. Starting Salary (2013)

Computer Engineering	\$70,400
Chemical Engineers	\$66,400
Computer Science	\$64,400
Aerospace/Aeronautical Engineers	\$64,000
Mechanical Engineers	\$62,900
Electrical Engineers	\$62,300
Civil Engineers	\$57,600
Finance	\$57,300
Construction Science	\$56,600
Information Science	\$56,100

Source: National Association of College Employers (NACE)

Job Descriptions

Avg. Salary (2010)

Agricultural and Food Science Technicians	\$32,670
Agricultural Chemist	\$69,790
Agriculture economic professors	\$62,050
Agriculture Engineers	\$71,090
Agricultural reporters	\$36,000
Agricultural workers	\$18,970
Animal care and service workers	\$19,780
Climatologist	\$87,780
Food Processing occupations	\$23,950
Farmers and Ranchers	\$60,750
Grain buyers	\$58,360

Source: Bureau of Labor Statistics, US Department of Labor

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Keeping *Salmonella* off of chicken

Contributed by Mike Brown,
President National Chicken Council

The *Salmonella* outbreak earlier this year linked to chicken was a stark reminder for the National Chicken Council (NCC) to redouble our food safety education efforts and remind consumers that we all play an important role in ensuring food safety for our families.

Given that we eat 160 million servings of chicken every day, the vast majority of consumers are cooking and handling chicken properly and having a safe experience. But we want that experience to be safe each and every time.

Most of the media stories that ensued omitted the fact that proper handling and cooking in the kitchen is

"... we all play an important role in ensuring food safety for our families."

—Mike Brown, President NCC



the growth of potential foodborne pathogens; organic sprays to cleanse the chickens and inhibit bacteria; and metal detectors to make sure that no foreign object makes its way into a product.

Microbiological tests for pathogens are then

conducted by companies and federal laboratories to help ensure that food safety systems like HACCP are working properly. The numbers tell us we're making tremendous progress:

- According to the FSIS Quarterly Progress Report released on October 26, 2013, 2.6 percent of young chicken carcasses tested positive for *Salmonella* — a fraction of the FSIS performance standard of 7.5 percent.
- The prevalence of *Salmonella* on raw young chicken carcasses is down 26 percent over the first quarter of 2013 and represents a decrease of 55 percent during the past five years.
- Over the last five years, the prevalence of *Salmonella* on ground chicken has been reduced by 50 percent.
- From 2001 to 2010, the latest 10-year period for which data are available, outbreaks related to *E. coli*, *Salmonella* and other pathogens decreased by more than 40 percent.

But we are constantly striving to do better. We expect a new FSIS performance standard for chicken parts sometime in early 2014. NCC is taking this very seriously and we are working collectively as an industry to determine more opportunities in second processing that will further decrease *Salmonella* on parts.

The bottom line is that all chicken is safe when properly cooked and handled, and that chicken producers and processors are continually seeking methods to make them even safer before leaving the plant. **UB**

the last step in keeping *Salmonella* off of chicken, not the first.

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COUNCIL**

That's why chicken

processors rely upon the best science, microbiology and technology available to reduce foodborne

pathogens in order to meet

and exceed standards set forth by the federal government.

It all starts even before the egg. Healthy breeder flocks lead to healthy chicks — measures are taken to prevent diseases from passing from hen to chick and to ensure that natural antibodies are passed on which help keep the birds healthy.

At the hatchery, strict sanitation measures and appropriate vaccinations ensure the chicks are off to a healthy start. At the feed mill, the finished feed of corn and soybean meal is heat treated, which kills any bacteria that may be present. On the farm, farmers adhere to strict biosecurity measures and the chickens are routinely monitored by a veterinarian to keep them healthy.

At processing plants, the U.S. federal meat and poultry inspection system complements efforts by chicken processors to ensure that the nation's commercial supply of meat and poultry products is safe, wholesome and correctly labeled and packaged.

Chicken processing facilities use a variety of intervention strategies at their critical control points that might include: the use of food-grade rinses that kill or reduce



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Certified Angus Beef® brand sets seventh straight record

Licensed partners cater to consumers; achieve 6.7% increase in fiscal 2013

Contributed by
Jennifer Schertz, Certified Angus Beef

They come from all across the globe. Some of them are competitors and friends, most have never met, but they're all part of a shared goal.

The 16,000 *Certified Angus Beef*® brand licensed partners continue to show that a common mission, delivering high-quality beef to consumers, is one that everybody in the food chain — rancher to distributor to consumer — can get behind.

Certified Angus Beef LLC reported record sales, marketing more than 60 million pounds of CAB product every month in fiscal 2013. Its partners sold 865 million pounds for the year that ended Sept. 30, an increase of 6.7% or 54 million pounds.

As the brand's 35th anniversary marked a seventh consecutive year of growth, company president John Stika credited leadership from those partners and rising consumer demand for premium beef. A brand that consistently satisfies consumers offers a strong value for their dollar, he noted.

"The quality beef movement our partners lead is gaining momentum," Stika said. "Everyone associated with it takes great pride in being part of a community that is committed to quality, and something much larger than ourselves."

Demand fueled balanced growth across sectors—middle meats, end meats and grinds—and divisions. Retail partners again accounted for the most sales, 46% at 398 million pounds. Sales for the top 14 retail chains that regularly featured the brand in circulars and promotions were up 26%.

Fajita meat, marinated steak and fresh corned beef and brisket led the charge in

value-added products, which set a new record of 24 million pounds, up 11.6%.

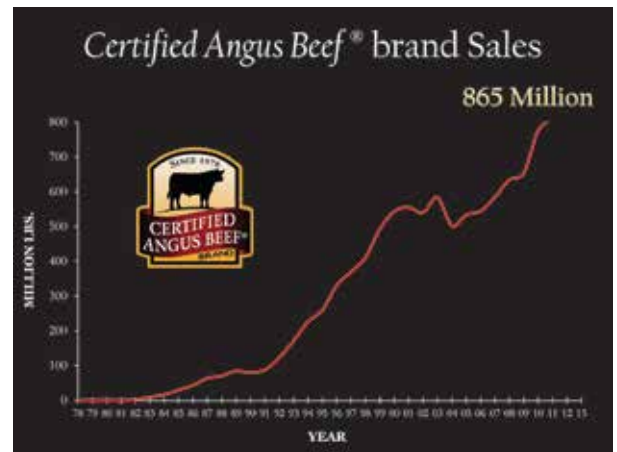
Foodservice partners made up nearly one-third of the brand's total sales this year at 276 million pounds sold, up 6.2%. Much of the increase came from distributors licensed longer than two years, showing strong growth in established markets.

An international sales increase of 17% proves the demand for premium beef crosses borders and oceans. Although some large markets like Russia and Saudi Arabia remain limited or closed to U.S. beef, the CAB brand found strong growth in South America's Colombia, Chile and Peru. Canada, Mexico, Hong Kong and Japan represent the highest volume markets.

But with record sales comes the need for record supplies, and America's farmers and ranchers did not disappoint. The acceptance rate, which tracks those Angus-type cattle meeting all 10 of the brand's specifications, rose to a record 24.2% last year. Cattlemen and women aim for those standards because of the higher prices they command, so despite a relatively static number of Angus cattle, their focus on quality genetics and management netted another 200,000 head that qualified for the brand. That was the equivalent of an extra three weeks of production in the year, and 66 million more pounds of product going into CAB brand boxes.

"It's clear that we have a hallmark opportunity to drive taste to consumers," said Stika. "Their increasing demand equals increasing trust in the brand. Our responsibility is to stay focused on providing the flavorful, quality beef

consumers want, and to understand the value it has to them." **UB**



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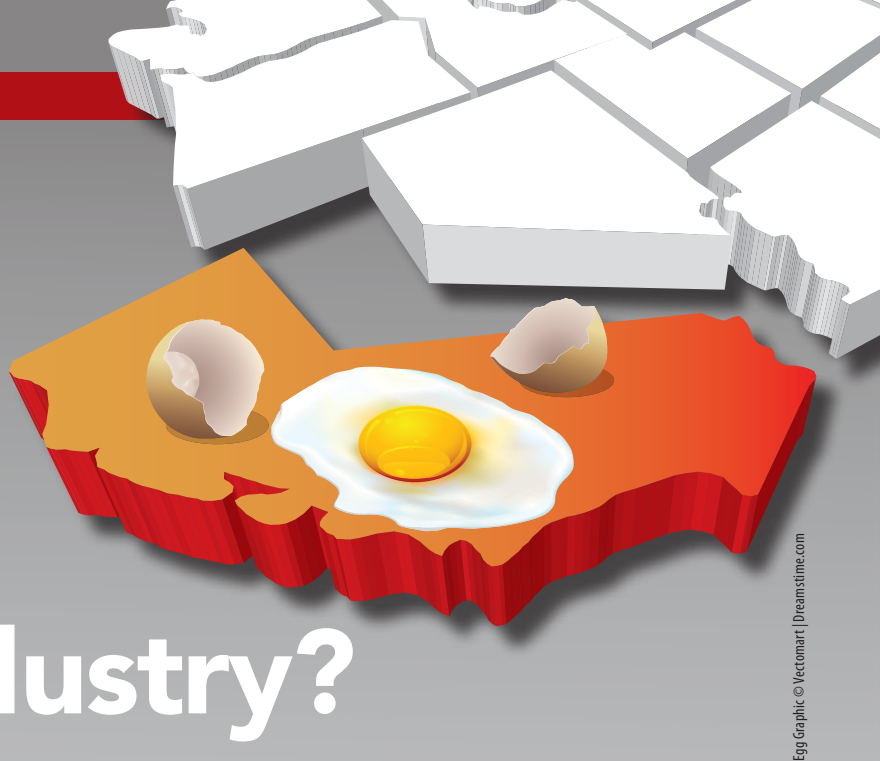
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Changes on the way for the U.S. egg industry?



Egg Graphic © Vectormart | Dreamstime.com

Should egg laying hens have the ability to stand up, turn around, and spread their wings without touching the sides of their enclosure or other hens? That was at least part of the question presented to California voters on their November 4th, 2008 ballots. Whether right or wrong, the

answer to the question formally known as Proposition 2 was “YES,” as represented by a 63.5% passing vote.

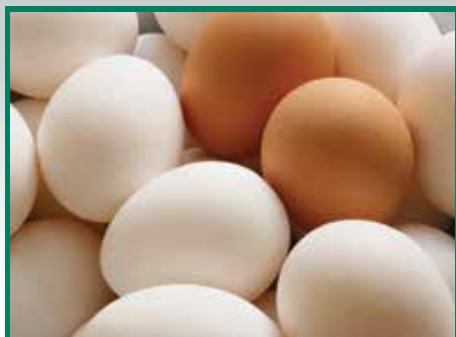
The motion left California producers, responsible for nearly 20 million egg laying hens, puzzled and angry given its vague language and potential economic impacts. Most would have to remodel existing facilities or build completely new ones to house their birds. The Prop 2 compliance deadline was set for January 1st of 2015 with those failing to meet requirements facing fines and potential jail time. In 2010, California Governor Arnold Schwarzenegger signed a law mandating that no eggs be brought into or sold in the state if they were not laid in compliant facilities. This law potentially protected the investment of California producers, but may create potential shortage conditions in a state with over 38 million consumers. As a general rule of thumb, each individual requires one hen to fulfill their egg consumption needs. Prop 2, in essence, may result in drastic price increases at the shelf due to higher production costs associated with increased space per bird.

Several California producers have begun to update facilities in preparation, in a number of cases turning to an “enriched colony” system which gives birds generally 116 sq inches of room along with the ability to partake in other natural behaviors such as perching and nesting. Similar standards were settled on by United Egg Producers (which represents over 90% of

U.S. egg layers) and the Human Society of the United States after Prop 2 passed, however, that agreement failed to make it into the farm bill.

Another influential piece of legislation did make it into the House Agriculture Committee’s markup though. Iowa Rep. Steve King’s Protect Interstate Commerce Act (PICA) prohibits any state from enacting laws that place restrictions on the means of production for agricultural goods that are sold within the state but are produced in other states. Also, declaring the California law unconstitutionally regulates and dramatically impacts producers from all over the nation. King’s amendment would allow non California compliant eggs into the state. These eggs would likely have reduced input costs and resulting price points when compared to enriched colony production or other California law compliant laying systems.

PICA would not only directly affect eggs. A number of trade barriers already exist from state to state, including restrictions on firewood to prevent the spread of certain pests, honey, alcohol, and also affect California’s previous bans on foie gras and shark-fin soup. A number of livestock



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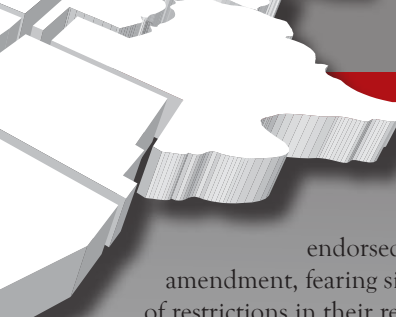
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“... there could be clues in what took place in Europe over the last few years.”



groups have endorsed King's amendment, fearing similar types of restrictions in their respective industries. Limitations they feel would hinder business across the U.S. and be very difficult to follow and abide by.

Producers have taken various actions in regard to the situation. Some have chosen a wait and see approach, while others will experiment with different types of compliant production both in California and in surrounding states. There has also been some hedging by California producers who are building noncompliant production outside of the state. It is still unclear how the whole situation will play out and what it will mean to the individual trading regions, but we can look at a similar situation which recently unfolded in Europe for clues.

In 1999, the European Union announced the ban of battery cage production for the consumer market. The implementation

had a thirteen year window, which concluded January 1st of 2012. Many producers waited until the last minute to make necessary adjustments, some ran both compliant and non compliant facilities, while others did nothing at all. Compliant producers feared that there would be a lack of protection against noncompliant eggs. For a short period, a shortage situation occurred, but the market was quickly saturated with product from both compliant and noncompliant facilities thereafter. To make matters worse for the EU producers, the European Union announced that it would allow eggs from noncompliant countries such as the Ukraine into the region.

What most of the EU industry failed to see though, was that the original motion for the cage ban came from animal welfare groups and ultimately the consumer. These groups began to petition the major retailers to carry only EU compliant production. Compliant eggs slowly but surely became the norm across the shelves of major retailers and in foodservice organizations.

Currently, two different markets have since developed in the Union, compliant production which has become standard and noncompliant eggs which can only be used for breaking. Opportunity to export shell eggs into the EU from noncompliant countries as a result tempered.

The U.S. industry may see a very similar situation develop in California in 2015. If a version of the farm bill which includes King's PICA is passed, eggs from non California Law compliant farms will be allowed into the state. Chains large and small will have a tough destination to make, particularly if King's Amendment allows potentially less expensive, noncompliant production into the region. How will buyers respond and what will that mean to the different trading regions across the U.S.? We will have to wait until 2015 to get most of these answers, but there could be clues in what took place in Europe over the last few years. **UB**

Article contributed by **Brian Moscogiuri**
Brianm@urnerbarry.com



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Kula Café - A community creating great employees for the food industry!

Recently, *Uner Barry's Reporter* was invited to meet with Mr. Roger Boyce and the staff at Kula Café in Asbury Park, NJ. Situated in the heart of an extremely depressed community, the Reporter was warmly greeted into this clean, friendly and extremely welcoming restaurant. According to Mr. Boyce, the mission of this distinctive café is to train youth (16 years and older who have lived in this recycling community of poverty) in a uniquely offered opportunity. Those interested and that have a desire to change their path and make their lives better, are offered the necessary tools to work in various roles within the food industry.

The Kula Café training program is 16 weeks in duration — 4 weeks of job readiness training, 8 weeks of hands on experience in the Kula Café, and 4 weeks



of paid internship with local restaurants, allowing the participants to demonstrate the skills they have developed to a prospective employer.

Kula Café is part of an initiative of the Interfaith Neighbors Organization of Asbury Park (which owns and operates the café), NJ. Heather Schulz is the Community Outreach Coordinator from Interfaith Neighbors who oversees the day-to-day operations and Wendy Escobedo is the restaurant manager. Wendy came to Kula Café with some culinary training

as well as six years restaurant experience which included everything from bussing tables to management.

The program is funded by a combination of investment funds and private foundations. Mr. Boyce said the private foundations have been quite generous in supporting the café and he showed his genuine gratitude for each and every donation. Boyce proudly told the Reporter that the restaurant's revenue is growing and he expects for it to be 100% sustainable within three years.

Local customers as well as a large percentage of patrons from surrounding communities come in support of the café where they enjoy a wide variety of breakfast and lunch menu choices. What makes this dining experience different

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The Kula Café, 1201 Springwood Ave., Asbury Park, NJ opened in April 2013. Roger Boyce, a retired start-up entrepreneur, dedicates his time as co-founder.

than most, is that when customers come to dine at Kula Café, they are giving the trainees the opportunity to practice their skills by working in a productive, authentic restaurant environment.

The Kula Café is open six days a week and serves breakfast all day and lunch from 11:30 am – 3:00 pm. It also opens its doors the first and third Thursday night of each month for a special Blues Night. Local blues and jazz musicians are invited to play in an open mic forum while customers indulge on authentic southern, Cancun cuisine.

To date, Kula Café has produced 11 graduates who are all gainfully employed in the food industry. Boyce is thrilled with the results. He further explained to the Reporter that employers and potential employers have very little risk because part of Kula Café funds is dedicated to paying the first month's employment for each employee. "It's a win-win for the employer" said Boyce.

Roger Boyce, having no experience in the food industry, is hungry for information that would help to further develop their curriculum and training. He is eager to find out from experts what they need so



Chiniqua in the kitchen at the Kula Café.

that he can help to supply the industry with well-trained employees. He welcomes those who are seasoned in any aspect of the food industry to reach out and offer their expert advice.

Contact the Kula Café info@kulacafe.org or 732-455-0514 **UB**

Article contributed by MaryAnn Zicarelli
Maryann@urnerbarry.com



Pictured Left to Right: Chiniqua, Thomas, Wendy Escobedo, Manager, Khalil, and Ericka

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NFI's 2013 Future Leaders Class outside Handy International's plant along the Chesapeake Bay in Crisfield, MD.

From Beantown to DC, NFI group finishes 2013 program with a lifetime of experiences

Four cities, thousands of frequent flyer miles and several extended bus rides later and the National Fisheries Institute's (NFI) Future Leaders Class concluded the 2013 edition of the program.

Since 1998, NFI has brought together a contingent of up-and-coming seafood professionals to network, learn and further expose themselves to the complexity of the industry through a series of plant tours, interactive workshops and group discussions.

The start of this year's program brought the class to Miami and Portland, and in the waning summer months, the Future Leaders ventured to Boston and Washington DC to complete the year-long program.

"The best part of the trip was spending time with other young leaders in the industry. It's always good to see a different perspective and learn from your peers," said National Fish & Seafood's Mark Pandolfo.

In August the Leaders headed to Boston, MA.

The week started at the Seaport World Trade Center where the Leaders boarded the Spirit of Boston for NFI's New England regional meeting. During a tour of the Boston Harbor, the class mingled with the program's past alumni, along with dozens

of NFI members, to chat about the current state of affairs of the seafood industry in New England and across the country.

The following morning Seafood Industry Research Fund (SIRF) Chairman Russ Mentzer met with the group to discuss SIRF's involvement with the industry, particularly its mission to fund research crucial to improving fishery management, import regulations and consumer attitudes toward seafood consumption.

Classmate Ryan Martin then hosted a tour of Preferred Freezer Service's Everett-based facility where he serves as the general manager of the plant's operations. Martin emphasized his company's "We Get it Done" approach to business and commitment to efficiency; evident not only in the plant's day-to-day operations, but also in its carefully constructed design.

Longtime industry mainstay Ipswich Shellfish Company was next up on the Leaders' agenda. There the class was treated to a full tour of the company's various shellfish and finfish operations. Ipswich's "waterfall" style lobster storage facility was of particular interest to the group, as were the freshly made lobster rolls provided to the class for lunch.

The day moved on to Boston's oldest fish packing district where Stavits Seafoods'

President & CEO Richard Stavits enlightened the Leaders with his dynamic insight into the company's vast history in the New England and global seafood trade. Stavits noted his company's multi-dimensional approach to serving various seafood markets with a diverse selection of products.

Moreover, Stavits touted the need for industry professionals to band together on sound buying and selling practices.

The day ended with a group dinner, made by the group, hosted by Create-A-Cook. The Leaders worked alongside professionally trained chefs with fresh seafood ingredients to prepare a full spread of ethnically diverse, but simple recipes.

The Boston experience wrapped up the next day with two breakfast presentations. Capitol Risk Concepts' Michael Lieberman led a discussion on the necessity for proper insurance coverage, regardless of where one might work in the seafood distribution chain.

Next, SeaFax engaged the Leaders with their credit reporting firm's work identifying operations that may not be paying their bills. The agency informed the Leaders of its data gathering process and how Leaders can actively engage with SeaFax to red flag dubious business

practices they might come across in the industry.

Finally, Wegmans Food Markets opened its doors to the class where the seafood department's management offered a tour. The group was armed with questions on Wegmans' procurement strategies and daily sales volumes and was generally impressed with the operation's distribution network.

In September, the final stretch of the 2013 Future Leaders program found the class in Washington DC to help spread seafood industry awareness to the country's leaders.

Before heading to Capitol Hill to have meetings with Congressional leaders to discuss a controversial seafood sustainability initiative undertaken by the General Services Administration, the class participated in a lively public speaking workshop with Tom Goodwin of Tom Goodwin Communications.

The next day the Leaders met with attorney Joel Roberson of Holland & Knight for a final pep talk about the ins and outs of lobbying with Congress. Armed with advice and information, the class took to Capitol Hill for a full day of meetings with Congressional staffers. All in all there was an overwhelmingly positive response from the meetings.

"Our trip to DC was highlighted by the opportunity to spend a day on Capitol Hill. That's an opportunity that I am grateful to have had the chance to experience," Pandolfo said.

Following a day navigating through the halls of the Congress, the Leaders took off to Maryland where Handy International was proud to host their very first Future Leaders class. The company's president and founder Terry Conway educated the class on Handy's long history as the original soft shell crab company in the U.S. before eventually expanding its operations internationally.

During a tour of the facility, the class learned about the company's commitment to handmade products and the careful steps taken to produce a top quality product. Handy then treated the Leaders to samples of its GastroPub line of items



The Pacific Northwest contingent of Future Leaders snagged a photo opportunity with Alaskan Republican Representative Don Young at his office in Capitol Hill.

while explaining the research, development and marketing strategy behind it.

From Handy, the class trucked over to Sea Watch International, the largest clamming company in the United States. The company's vice president of marketing and sales Guy Simmons, presented SeaWatch's history as the company has grown to be the largest clam quota holder in the country.

From SeaWatch the group learned about seafood testing procedures at EuroFins particularly the precision and timeliness with which the laboratory carries out its testing.

On the very last day of the program, the Future Leaders class headed to NOAA Fisheries and engaged in a fruitful discussion with NMFS's Chief of External Affairs Laurel Bryant.

Bryant demonstrated the sustainability breakthroughs and overall success of U.S. fishery management in Alaska and the lower 48. Additionally, she revealed how NMFS has bolstered promoting U.S. fishery management's success in building a sustainable model for the rest of the world to follow.

The session ended over a group discussion with NMFS personnel concerning their work with foreign relations, code enforcement, sustainability concerns and more.

The 2013 Future Leaders class will reconvene one more time to graduate at the NFI's 2014 Global Seafood Marketing Conference in Miami. While the program may be over for the group, the memories and experience will endure. Moreover, NFI can again claim success in the creation of another network of professional seafood leaders to share a bit more knowledge, camaraderie and

passion, necessary for any industry to thrive into the future.

"The whole experience broadened my horizons and reiterated just how vast the seafood industry is," said Emily Matlock, a fresh fish sales manager for Trident Seafoods. "I have a renewed sense of dedication to not only being more well-rounded and versed in all aspects and issues that our industry faces, but to educate consumers about sustainable seafood practices in place." **UB**

Article contributed by Michael Ramsingh
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The future of meat?

Back in 2009 *Urnner Barry's Reporter* was among the first to explore the real possibility that in the future, our meat may be grown in a Petri dish. At the time this “Petri-dish cuisine,” as we called it, was a new form of meat science. Although still very much in its infancy, a huge milestone was surpassed this past August when the first hamburger comprised entirely of meat grown in a lab was consumed by a panel of tasters.

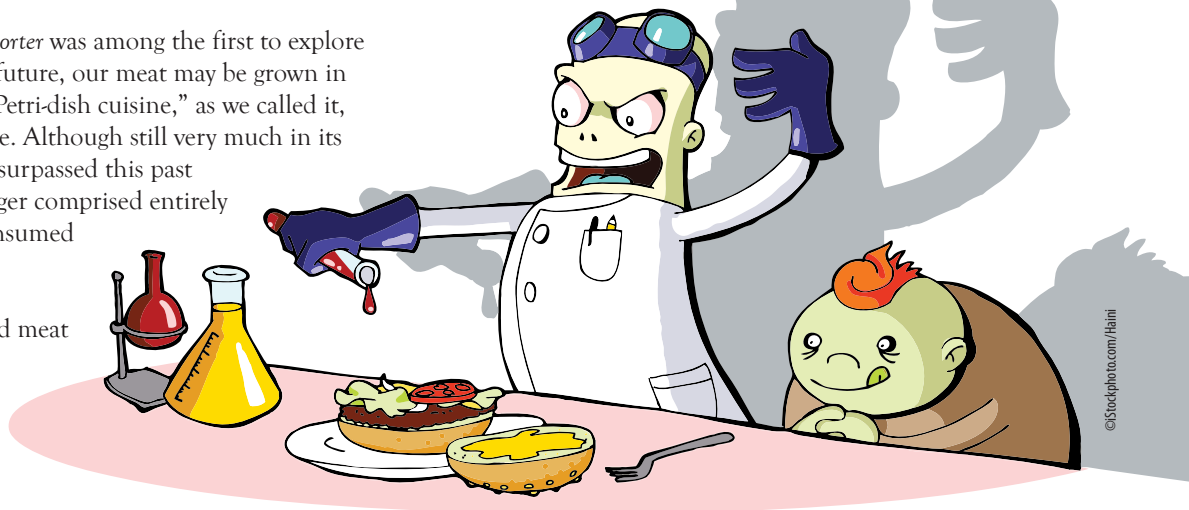
The “reasonably good” cultured meat burger cost about \$325,000 to produce. It was made up of 3,000 separately grown, “cultured” muscle strips which began as just a few cow cells. In an August interview, Chicago-based food writer Josh Schonwald said the “bite feels like a conventional hamburger,” but that the meat tasted “like an animal-protein cake.” With the United Nations expecting global population to grow from the current 7.2 billion to about 9.6 billion by 2050, the ability to raise enough meat, or something meat-like, will become increasingly more important. In the future, it seems likely that our meat supply will be a mix of conventional production practices, sustainably raised meats, and cultured products like our burger and plant-based alternatives.

Vegetarians are likely throwing a party about now just thinking about the possibility of eating “meat” guilt free, in the not too distant future. As the planet begins to think about how it is going to supply its burgeoning population with proteins, non-animal based meats are gaining consumer traction. Companies such as Beyond Meat, which manufactures meat substitutes largely produced from soy and pea proteins and amaranth (a rice or maize like grain which has been harvested for 8000 years), are leading the charge in producing non-traditional meats. Just how near that future will be depends a great deal on available research grants along with the regulatory scrutiny and slowdowns that stand between this burger and your local butcher case.

WHERE NEXT?

It's been made pretty clear that not only can we create living tissue in a lab but we can create tissue which is edible. Growing tomorrow night's dinner in a Petri dish doesn't sound like it would strike a great appeal with one's taste buds but at the press conference following the test in August, some were quoted as calling it “close to meat.”

Isha Datar, the director of New Harvest, a nonprofit research group focused on alternative meat production methods, is a vocal proponent of exploring alternative protein “manufacturing.” She is especially knowledgeable on the novel subject of in vitro meat production. According to Datar, with the global meat herd in 2050 projected to be 100 billion land animals for 10 billion



people, we just don't have the resources to maintain more animals. She says on the New Harvest website that it is not clear what the consequences of this increase will be, particularly when coupled with a growing global population. Although conventional meat production may be capable of feeding a population of 9 billion, this ever present fear among economists and the general populous of the future state of our global food supply, is what will force the world to adopt alternative animal farming systems.

WHEN WILL “LAB-GROWN” MEAT BE AVAILABLE?

According to just about everyone who has an opinion on the matter the biggest driver will be out of economic necessity. Yet the research depends on funding; something there isn't a lot of publicly available. The more money, the faster cultured meat becomes available to the consumer. But it's not just about money. The technology for such a big undertaking still needs to be developed and implemented. According to Datar the things that hold this technology back are: 1) creating a medium for the cells to grow in that is totally plant-based and sustainable, because at present it is not, and 2) making [lab-grown meat] affordably and quickly. But these are engineering problems, she says, not problems of difficult science.

If and, more accurately, when significant changes come to food production, whether the world will be ready or not is certainly at question. Our overall perceptions of food and how we use it are constantly in motion and big strides have been made marketing meat alternatives, such as soy, to today's consuming public. With science moving forward, preliminary indications suggest that our vision of food in the future will certainly include a combination of traditional, plant-based and cultured meat alternatives. Food production in the U.S. has always been about alternatives and choice. The question is which one will you make? **UB**

Article contributed by Russell W. Whitman
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pasteurized crabmeat
mahi king crab snow crab
shrimp cold water lobster
tails clams warm water
lobster tails imitation
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G. F. Higgins

OCEAN VENTURE



Landmark environmental study released on the egg industry

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

In October, AEB shared a comprehensive press kit with the media detailing the results of the landmark 50-year Environmental Footprint study conducted by the Egg Industry Center.

The study's main finding highlights that while the U.S. egg production has increased during the past 50 years, the industry has also been able to significantly decrease its environmental footprint. The press kit included the release, fact sheet and related infographics. The key messages noted that:

- Today's hens are producing more eggs and living longer due to better health, nutrition and living environments.
- At the same time egg farms use fewer resources and produce less waste including the use of:
 - 26% less daily feed
 - 32% less water
 - 71% fewer greenhouse gas emissions.

The full study and accompanying materials can be found on IncredibleEgg.org, and AEB will be posting on its social networks to drive traffic to IncredibleEgg.org. A slideshow featuring study highlights was also pitched to the media. Targeted follow up with key reporters is ongoing.

"The U.S. egg industry has evolved remarkably over the past five decades by incorporating new technologies to protect natural resources," said Hongwei Xin, agricultural and biosystems engineering and animal science professor at Iowa State University, director of the Egg Industry Center and the study's lead researcher. "Egg farmers have improved their production practices, allowing them to provide an affordable source of high-quality protein while using fewer resources and producing less waste."

MEDIA OUTREACH

Within the first week of launch, media coverage generated more than 19 million media impressions. Additionally, AEB worked with the NBC News Channel to capture background footage of Simpson's Eggs in Monroe, N.C. This footage was then distributed to more than 20 NBC affiliates across the country. Feedback from the NBC producer was extremely positive, saying the footage was the best he's seen and is a testament to the industry.

Journalists are continuing to reach out for more information. AEB successfully coordinated interviews with Bob Krouse, an egg farmer for Midwest Poultry

Services in Indiana, for both consumer and trade publications. An editor from JobPosting Magazine was working on a feature on sustainable agriculture. Work is also ongoing with the reporters from Environmental Leader on a bylined article from Hongwei Xin.

Krouse will also travel to New York City in December to participate in desksides with long-lead editors from top consumer magazines to garner additional interest in the environmental study. Through its Consumer Marketing outreach, AEB hosts at least two desksides with these influential members of the media each year.

In 2014, AEB will reach key influencers in both egg product marketing and foodservice through print and digital advertising in February and March. Additionally, as interest in agricultural sustainability continues to grow, AEB will be analyzing various egg industry and related conferences and exhibitions for the opportunity to share the Environmental Footprint findings with relevant audiences.

A CLOSER LOOK AT THE FINDINGS

Due to increased feed efficiency, advancements in hen housing and manure management, egg farms now use less water and energy on a daily basis and release less polluting emissions. Every aspect of the egg

"Every aspect of the egg production process, from cultivating feed to raising the laying hens, has led to a reduced environmental footprint."

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production process, from cultivating feed to raising the laying hens, has led to a reduced environmental footprint.

- **Feed efficiency** plays a key role in reducing environmental impacts. Due to advancements in nutrition and bird breeding, young hens now require 48 percent less food during the rearing period than they did in 1960 and the laying hens have 42 percent better feed conversion. Using 1960 technology to produce the 2010 egg supply would have required 78 million more hens, 1.3 million more acres of corn and 1.8 million more acres of soybeans.
- **Advancements in hen housing** such as improved building ventilation, temperature control, better lighting, and a more secure housing environment, help to ensure that hens are protected from disease-carrying wildlife. These techniques have been widely adopted by egg farmers across the country, leading to healthier hens with a lower mortality and higher rate of egg production. In addition, advancements in the development of preventative medicine to eliminate avian diseases have greatly improved hen health.
- **Manure management** has played a role in minimizing the egg industry's environmental footprint. The vast majority of manure from laying hens is recycled into crop production, providing nutrients for plants, contributing to healthy soils, saving energy and reducing commercial fertilizer use.

LOOKING AHEAD

With the growing U.S. population and egg demand on the rise, egg farmers play an important role in providing an abundant and affordable source of high-quality protein.

"The U.S. population has increased by 72 percent over the past 50 years, but efficiencies in egg production have enabled us to meet the demands of the growing population with just 18 percent more hens, while also leaving a smaller environmental footprint," said Krouse. "Egg farmers are now in a position to help fulfill the growing need for an affordable and nutritious source of protein in an environmentally responsible manner."

Egg farmers are dedicated to providing safe, nutritious food while maintaining the highest quality care for their hens. At the same time, farmers understand the importance of protecting the land, water and air for their communities and future generations, and they are always looking to identify ways for continued improvement. Efforts to further improve feed efficiency, hen housing facilities and manure management will facilitate even greater environmental footprint reductions in the future.

The study was funded by the American Egg Board, the U.S. Poultry and Egg Association, the United Egg Association- Allied and the Egg Industry Center. To obtain data for 2010, researchers conducted anonymous surveys with egg farmers and collected data on 57.1 million young hens and 92.5 million laying hens. For more information, visit www.incredibleegg.org or www.eggindustrycenter.org

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**

EGG FARMERS REDUCE ENVIRONMENTAL IMPACT

Today's hens are producing more eggs and living longer due to **better health, nutrition and living environments**; yet at the same time egg farms use **fewer resources** and produce **less waste**.

U.S. population increase
over the last 50 years

+72%

Egg production efficiencies
developed over 50 years
enable farmers to
increase productivity

27% more eggs
per day

18% more hens

All while **reducing environmental impact**

26% less daily feed

32% less water

71% fewer greenhouse gas emissions

IMPROVING FEED

Today's hens use a little over **half the amount of feed** to produce a dozen eggs

Using 1960 technology to produce today's supply of **77.8 billion eggs** would have required

78
million more hens

1.3
million more acres of corn

1.8
million more acres of soybeans

SAVING WATER

Compared to 1960, today's hens use **32% less water** to produce a dozen eggs

The volume of water conserved would fill

3,716
Olympic-sized swimming pools

REDUCING EMISSIONS

2010 egg production has **71% lower greenhouse gas emissions** than in 1960

The amount of CO₂ reduced is equivalent to taking

5.2 million cars off the road for a year



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For more information, please visit www.IncredibleEgg.org

NFI's 2013 Future Leaders bring SeaShare's mission to thousands

Members of the 2013 class of the National Fisheries Institute's Future Leaders program headed to Texas and raised public awareness to thousands of festival goers for seafood charity SeaShare, at the Galveston Shrimp Festival held September 27-29, 2013.

Annually, each NFI Future Leaders class works with SeaShare to help raise food donations, funds and awareness through a class project. SeaShare is a charity founded to work with the seafood industry to help solve hunger in America. This year the group was tasked to find a long-term approach to broaden SeaShare's marketability past the seafood industry and to the public at large.

The project kicked off with a VIP shrimp dinner sponsored by event organizer Yaga's Café. SeaShare director Jim Harmon and



NFI's Future Leaders and friends representing SeaShare at the 2013 Galveston Shrimp Festival.

the class engaged with representatives from the festival's largest retail supporters on SeaShare's goal to provide disadvantaged Americans healthy seafood options at their local food banks.

On day two, the festival opened to thousands of attendees where SeaShare and the Future Leaders, in conjunction with the Galveston Shrimp Company, hosted a booth to raise funds and spread local awareness of the charity's impact on local communities in Galveston and across the country.

At the booth the Leaders sold retail packs of donated seafood items. Options included salmon burgers from Trident Seafoods, shrimp from Galveston Shrimp Company and tuna steaks courtesy of Orca Bay Seafood.

Trident and Orca Bay's products were shipped from the Pacific Northwest as a donation courtesy of Preferred Freezer Services.

The booth also featured a 50/50 raffle with proceeds going directly to SeaShare. Wristbands, donated by Limson Trading, were also distributed and helped spur conversations with the public about the charity's impact within their community.

All in all close to \$1400 was raised in the name of SeaShare, a figure Harmon said

will contribute nearly 11,000 meals for Americans nationwide.

"Texas was a great experience that set the foundation for future classes to expand upon," said Dominick Gattuso, CFO of Chicago's Fortune Fish Company. "The 2013 class was able to create awareness outside the industry of SeaShare and all that it does to feed the hungry. It was the first step towards expanding SeaShare's reach beyond the seafood industry and to the general public."

Harmon echoed Gattuso's sentiment that the event was unique in exposing SeaShare to a greater public audience, educating them on how the charity directly impacts communities across the country.

"The Galveston Shrimp Festival was a wonderful event. I enjoyed working with the Future Leaders to raise awareness for SeaShare. The shrimp was fantastic, and we raised dollars to feed more seafood to hungry Americans. I especially want to thank [Galveston Shrimp Company General Manager] Nello Cassarino and the Galveston Shrimp Company for their southern hospitality," said Harmon.

To date, the 2013 Future Leaders Class has raised over 100,000 pounds of seafood product donations and more than \$18,000 worth of cash contributions for SeaShare; nothing short of a great



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accomplishment for the group said Capital Risk Concept's Michael Lieberman, who also serves on SeaShare's board and is a Future Leaders Alumnus.

"This year's NFI Future Leaders class has gone far beyond their call of duty, states Lieberman. "Hunger in America is a big issue, and this year's class, along with SeaShare, is demonstrating how the seafood industry is making a difference." **UB**

Article Contributed by Michael Ramsingh | Mramsingh@urnerbarry.com



During the festival, the Future Leaders sold retail packages of seafood items donated. All proceeds went to SeaShare.

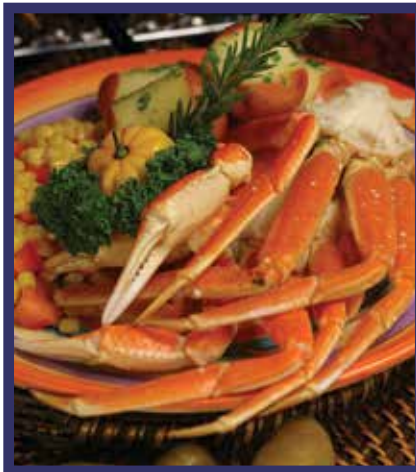


The Future Leaders held a 50/50 raffle and passed out SeaShare brochures to festival attendees at the SeaShare booth.



The Future Leaders' SeaShare booth at the Galveston Shrimp Festival.

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Dry conditions persist in western plains; may limit cattle herd rebuilding

While most of the eastern half of the U.S. is now considered drought-free following generally good rainfall amounts in 2013, western portions of the Plains and the far western states remain abnormally dry, which could limit the rebuilding of the U.S. cattle herd.

Market conditions are ripe for rebuilding the beef cattle herd but a lack of adequate moisture may be the factor that keeps it from happening just yet in key production regions such as the western halves of Texas, Oklahoma, Kansas, Nebraska and eastern New Mexico to southeastern Colorado.

Amarillo, Texas and the surrounding areas have been near the center of the worst drought on record that began in late 2010 and which has not yet released its grip on the region. More rain has fallen there this year than in the past two, but that's not saying much since the driest 12 months on record were set from late 2010 through 2011.

Agricultural losses due to the 2011 drought were pegged at \$7.62 billion, according to the Texas AgriLife Extension Service of Texas A&M University. Losses associated with livestock accounted for about \$3.23 billion, or more than 42% of the total.

According to the U.S. Drought Monitor, nearly 60% of Texas held a severe drought rating as of the end of October, about the same as a year ago but better than the extreme drought conditions seen throughout most of the summer. Enough rainfall has occurred to provide some relief to pastures and help the growth of winter wheat and fall grasses, yet water levels in streams, ponds and lakes remain far short of normal.

Lake Meredith, located northeast of Amarillo, with a capacity of nearly 1.408

million acre-feet of water, was completed in 1965. The lake was built to provide drinking water to Amarillo, Lubbock and surrounding areas. The Canadian River Municipal Water Authority, which manages Lake Meredith, ceased pumping from the lake this summer after water levels reached an all-time low of about 26 feet, just over 1% of its capacity, said Tammy Hamby, with the CRMWA. The lake has recovered some and was last at about 33 feet. The all-time high for the lake was hit in 1973 with a depth recorded at nearly 102 feet.

Pictures of the lake from 2004 through present help illustrate the effects of the drought. (right)

Due to back-to-back years of severe drought in key cattle-producing regions and record high feed costs, the U.S. herd fell to 89.3 million head as of Jan. 1, 2013, the smallest since 1952. Industry analysts and agricultural economists participating in a mid-year survey conducted by the Livestock Marketing Information Center estimated that the herd declined further by 1% to possibly 2% during the first half since corn prices remained high and pasture conditions had not yet improved significantly in the central and southern Plains.

Declines in corn prices and improved pasture conditions in parts of the Plains region during the second half of the year may have led to some retention of heifers to replenish the breeding herd but it may not be any larger as of Jan. 1, 2014 than the previous year. Some measureable

Harbor Bay at Lake Meredith, located northeast of Amarillo, TX, provided by the Canadian River Municipal Water Authority.



Lake at a fairly full level; photographed in 2004.



Same location in 2011 after the state's worst-ever drought.



Same location taken week of 11/06/2013.

growth in the herd might occur in 2014. Some analysts forecast total cattle slaughter next year to be down sharply, off perhaps around 7% or more from 2013 levels.

While pasture conditions in the Texas Panhandle have improved some, Lake Meredith serves as a symbol that the region's water resources are far below where ranchers and urban dwellers alike want them to be. **UB**

Article contributed by Curt Thacker
Cthacker@urnerbarry.com

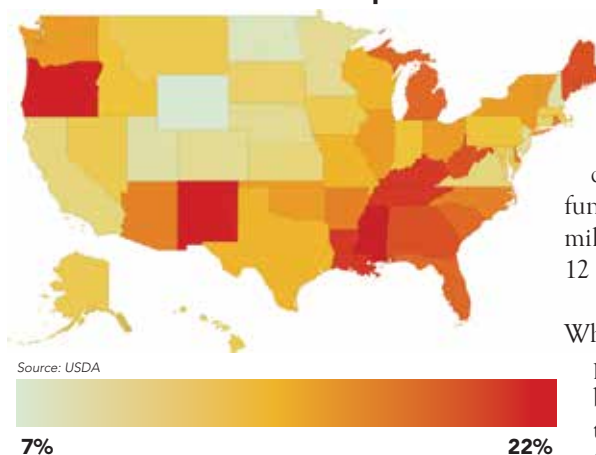
"Agricultural losses due to the 2011 drought were pegged at \$7.62 billion."

SNAP benefits reduced in November – a look at the numbers

During the U.S. financial crisis, the government decided to increase the benefits provided by the USDA's Supplemental Nutritional Assistance Program (SNAP) in order to aid families directly or indirectly affected by the economic downturn. This stimulus, included in the American Recovery and Reinvestment Act of 2009, increased the maximum monthly household benefits by 13.6%, giving a one person household an extra \$24 per month, two person households \$44 per month, \$63 for three and an additional \$80 for four person households.

On November 1, 2013, part of this added assistance came to an end, reducing the SNAP benefits received by roughly 23 million households or 47.6

SNAP Participation as a Percent of State Population



million individuals as of the latest USDA participation figures. For a family of three, this cut equals roughly \$29 per month.

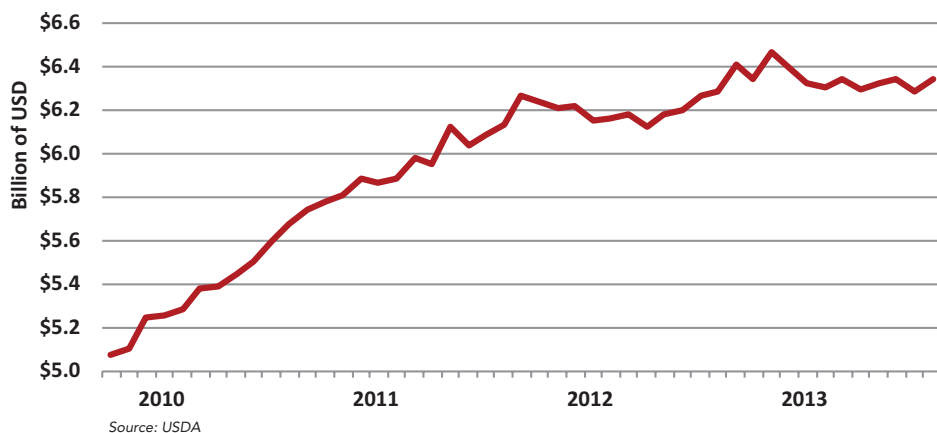
The average household monthly benefit as of August was \$275.84, so a cut of \$29 equates to over 10% of a household's monthly food budget (ignoring other expenses these funds can go toward). With roughly 23 million households on SNAP benefits as of August, the difference in monthly SNAP related funding/spending drops by nearly \$667 million a month or \$8 billion over the next 12 months.

While some may argue that the SNAP program is over inflated at over \$6.3 billion a month and that because of that deep cuts should take place, there is also the question of how budget reductions could affect center of the plate protein purchases. In seven states, 20% or more of the population is on some degree of SNAP benefits. On the United States map, states in red have around 20% or greater of the population on the program. Hypothetically, of the \$8 billion in potentially lost food sales over the next 12 months, retailers in these states may possibly feel the impact the most.

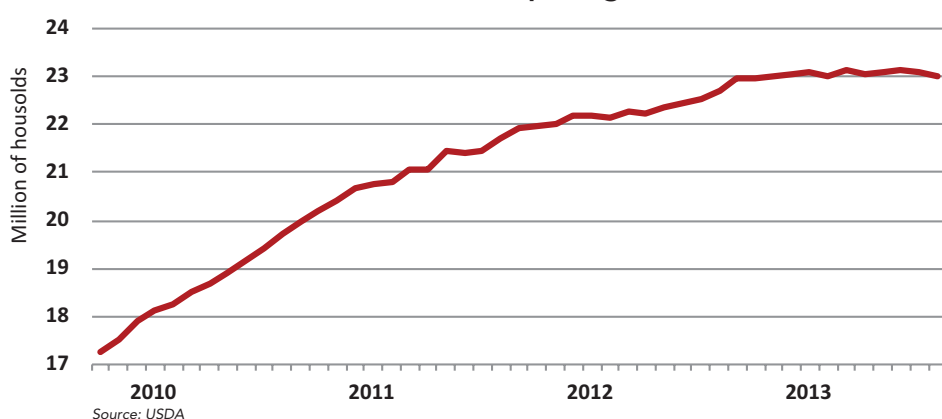
At the time of publication, debate over further cuts in SNAP included in drafts of the farm bill have yet to be factored in. If further cuts were to take place down the road, the effects would potentially be amplified.**UB**

Article contributed by Russell Barton
Rbarton@urnerbarry.com

SNAP Cost/Benefits



Households Participating in SNAP



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Contributed by Lyndee Stabel,
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As a meat marketer worries about the availability of beef, so a cattle feeder frets about the supply of cattle.

With a U.S. cattle inventory at levels not seen since 1952, “We’re much smaller than we ever intended to be,” says Derrell Peel, Oklahoma State University livestock marketing specialist. Drought and other circumstances led producers to liquidate their cow herds 15 out of the last 17 years, despite recent market signals to expand.

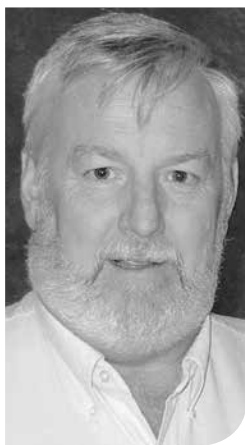
But that is starting to change and Peel expects producers will rebuild their herds in the next several years.

Eventually that will not only mean more beef, but perhaps more, better beef. Many cattlemen were forced to sell more animals than normal during the drought, but the silver lining is that they often kept only the best of the best.

“We’ve probably got this herd as young and productive as maybe it has ever been,” Peel says. “When we do start to expand, we have the capability for a year or two to expand faster than what we could have probably seen otherwise.”

Yet Peel expects it to be 2017 before herd numbers can even recover to 2011 pre-drought levels. Females are not only in strong demand as breeding animals, but there’s real competition from feedlots that are in desperate need of cattle to fill pen space.

Such strong market signals for more feeder cattle would typically send ranchers into high gear to expand their herds and calf crops, but for many American cattlemen today the situation is not that



Derrell Peel, Oklahoma State University livestock marketing specialist

simple. Most are more than 62 years old, and are not looking to increase their workload.

“When you show a lot of older producers the potential that is out there from the cow calf standpoint, they say, ‘Yeah, I see all of that, but it ain’t going to be me. It’s going to be someone else,’” Peel says. But who will that “someone else” be? Getting into the cattle business is not an easy task.

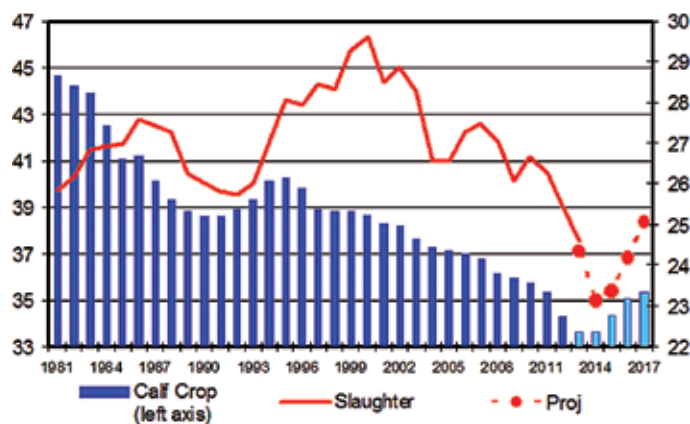
The next generation of cattlemen cannot borrow enough money to get started, so Peel says it’s up to the older ranchers to help get them in business with long-term contracts or lease arrangements.

No matter who takes on the challenge, the fact remains that the market needs more feeder cattle than are available today. Now Peel says the question is, “How far do we need to grow, and how fast can we do it?”

Those in every part of the beef business are anxious to find out. **UB**



Calf Crop Versus FI Steer and Heifer Slaughter



Livestock Marketing Information Center

Data Source: USDA-AMS & USDA-NASS Compiled & Analysis by LMIC

C-N-39 01/29/12

Urner Barry adds depth to market coverage with news service

In an effort to provide exclusive content to the Urner Barry family of products including Comtell, SeafoodNews, Foodmarket, and Foreign Trade Data, we are pleased to announce the formation of Urner Barry Newswires.

This newly-assembled news team will deliver the latest in breaking agricultural, seafood, and food industry news to Urner Barry customers. According to Urner Barry President, Paul Brown, "this newly-formed venture is the first in the industry to offer coverage of the entire center of the plate."

One of the most exciting developments in the process of creating UB Newswires was acquiring journalist and long time market participant Curt Thacker for original content creation. Most recently at Dow Jones Newswires, Curt spent 22 years at Wilson Foods serving in various capacities from hog procurement to corporate manager of the fresh pork department.

In 1995, Curt joined Knight-Ridder Financial as senior livestock correspondent and has covered the livestock, poultry and meat markets for the past 18 years including the last nine years with Dow Jones Newswires.

Urner Barry aims to continue evolving UB Newswires to better serve the industry. Through a reliable, consistent stream of interesting and relevant stories, interviews, and other media, we hope to keep our customers better informed. **UB**



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Show's offerings reflect regional consumer, changing U.S. demographics

Recently, *Uner Barry's Reporter* was offered the opportunity to attend the 12th annual Quirch Foods Buying Show which was being held at the Westin Diplomat Resort & Spa in Hollywood, FL. Participation at the event is typically open only to existing food vendors and customers of Quirch Foods so when *Uner Barry's Reporter* received an invitation we, along with over 1,000 independent and chain retailers, jumped at the opportunity to see and sample the latest food industry offerings.

As one of the largest distributors and exporters of meat and seafood in South Florida and the Caribbean, the products offered during the event reflected the demographic makeup of not only Quirch Foods' primary customer base, but also the rapidly changing makeup and tastes of the U.S. consumer as a whole.

Americans are increasingly interested in tropical cuisines, according to Technomic.



The Kikiri Quirch line of products reflects the company's commitment to not only their long standing customers in the Southeastern United States and the Caribbean, but it's dedication to taste innovation and adaptation to constantly changing U.S. consumer demographics.

That includes Hawaiian (28%), Caribbean (27%), Jamaican (22%) and Cuban (19%). Chef Elizabeth Johnson, Culinary Institute of America, is well versed in Caribbean, Central American and Cuban foods. She told the *Reporter* that it's no wonder the U.S. consumer is drawn to the "certain cadence and quality of life attributed to the islands and their foods." The climate, the water, the heat and the people all help spin a gastronomical web of sorts that envelops us. Chef Elizabeth said that the Caribbean and its cuisines are "sexy" and they have been and will be for a long time. "There's something captivating and mysterious about Cuba and its people. Here, and throughout the Caribbean, there are important traditions and flavor profiles that can't be glossed over."

At their show the company's Kikiri Quirch label could be seen gracing a variety of cooked and uncooked chicken products. The image of wholesomeness and



Quirch Foods' Poultry Buyer, John Hazard, told the *Reporter* that besides offering exceptional products, the employees of Quirch pride themselves on providing quality service in harmony with the company's family-oriented values.

convenience was evident, but so was the promotion of just how flexible chicken is to any number of traditional regional dishes. When asked about poultry as it comes to Caribbean food, Chef Elizabeth commented that "roasted chicken, along with some plantains, is synonymous with the Caribbean," while in Central America fried chicken is integral to the regional diet. Chef Elizabeth continued by saying that chicken is part of a "vibrant tradition" in regional fare.

Over the course of the two day event nearly 100 vendors, many of which offered products specifically manufactured for their customers' unique cultural requirements, provided tasty treats to attendees. But more importantly, they provided a thorough understanding of their product lines and the unique challenges inherent in marketing to the nation's growing Caribbean and other ethnic influences. **UB**

Article contributed by **Russell W. Whitman**
Rwhitman@urnerbarry.com



Although everyone who attended the Quirch Foods Show came out on top, Kevin Crofton (far right), President Crofton & Son's, along with his team pose with Miami Hurricane's mascot, Sebastian the Ibis, after taking home first place for their award-winning booth.



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Low seafood consumption is a serious public health issue

Contributed by Linda Cornish
Executive Director,
Seafood Nutrition Partnership

The media often covers the benefits and risks of eating seafood, but unfortunately the “risks” tend to overshadow the “benefits.” This is likely one of the reasons Americans are eating less seafood, as evidenced by the 14.4 pounds per capita seafood consumption in 2012 as reported by NOAA. If we all followed the USDA Dietary Guidelines for Americans, then we should be consuming 26 pounds per capita of seafood per year.

The fact is not eating enough seafood is a public health issue that needs urgent awareness.

We need to put risks in perspective. According to the Centers for Disease Control and Prevention (CDC) the #1 killer in the United States is heart disease, taking about 600,000 lives every year. In comparison, the CDC has analyzed the number of deaths from foodborne illnesses from 1998 to 2008, resulting in about 1,451 deaths per year. The food categories in this figure include: 278 from poultry, 240 from vegetables, 140 from red meat, 140 from dairy, 93 from fruits and nuts, 71 from fish, and 23 from shellfish.

The body of science on the health benefits of Omega-3 eicosapentaenoic acid (EPA) and docosahexaenoic acid (DHA) has grown substantially, and the best source for EPA and DHA is seafood. The Global Organization for EPA and DHA Omega-3 (GOED) states that since the 1970s there has been over 20,000 research studies on the essential benefits of EPA and DHA on human health. In simple terms EPA supports heart health and DHA supports brain and eye health.

In research studies it's been observed in human trials that eating seafood twice a



week has been shown to reduce the risks of dying from heart disease by 36%. If we were able to reduce the number of heart disease deaths by 1/3 then that would mean saving about 200,000 lives in the U.S. each year.

The American Heart Association's (AHA) Impact Goal by 2020 is “to improve the cardiovascular health of all Americans by 20 percent, while reducing deaths from cardiovascular diseases and stroke by 20 percent.” To help achieve this goal AHA has developed suggested habits called “Life’s Simple 7.” One of the 7 simple habits is to eat healthy including fish twice a week. A 2012 AHA update report found that only 1 in 5 American adults and 1 in 10 American children eat fish twice a week. This consumption data is from the National Health and Nutrition Examination Survey (NHANES).

Another way to assess low seafood consumption is our intake of EPA and

DHA. Prominent health organizations recommend 250-500mg of Omega-3s EPA+DHA per day. NHANES shows that the average intake for Americans is 90mg of Omega-3s EPA+DHA per day, and it is even lower for children.

The bottom line is that our diets impact our health more than any other action in our daily lives. We all know how hard it is to develop a new habit, but sometimes it just takes one thing to get us started on the right track. One easy thing that we can do to jumpstart a healthy life is to eat seafood twice a week.

ABOUT SEAFOOD NUTRITION PARTNERSHIP

Seafood Nutrition Partnership is a nonprofit with a mission to inspire a healthier America through partnerships that raise awareness about the essential nutritional benefits of eating seafood. www.seafoodnutrition.org **US**



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Contributed by
the National Turkey Federation

Over the rise of a glistening green countryside this spring, the gobbling of tom turkeys will be heard again on the historic Leesburg, Virginia farm of the late Governor Westmoreland Davis. With help from the National Turkey Federation, the turkeys' presence on the grounds marks the farm's recommitment to advancing the fundamentals of agriculture. Morven Park in the early 1930s had one of the largest poultry farms on the East Coast, with a flock of 20,000 award-winning bronze turkeys. The turkeys this spring will be just three — but they bring with them a bit of their own history, and a strong, new beginning.



Virginia Governor Westmoreland Davis served from 1918 to 1922. Raising nearly 20,000 bronze turkeys at his Leesburg, Virginia farm, Davis had built one of the largest poultry farms on the East Coast by the 1930s. Photo: Morven Park

This spring, the turkeys taking up residence at Governor Davis' farm are newly arrived from a holiday stopover at

George Washington's Mount Vernon. They are the National Thanksgiving Turkey and his alternate, presented to President Obama just before Thanksgiving in a tradition started by the National Turkey Federation in 1947. The nationally celebrated turkeys join the ruler of the roost, Franklin, a resident for the past year at Turkey Hill Farm.

Morven Park established Turkey Hill Farm on the site of Davis' former turkey operations. The 1,000-acre property is the governor's legacy from the early 1900s, encouraging the use of the latest scientific methods for profitable farming by improving soil quality and boosting the health and productivity of farm animals.

The National Turkey Federation assisted Morven Park with acclimating the

turkeys as well as arranging the advice of veterinarians. Morven Park built new housing for the turkeys as well as fencing and aviary covering. As the new permanent home for the National Thanksgiving Turkey, its alternate and the Park's resident bronze turkey, the Turkey Hill Farm will host educational programs with area public schools. Students will arrive on site to plan, plant, and maintain vegetable gardens as they complete a service-learning project.

The Park continues to reflect the ideals advanced by Gov. Davis — civic responsibility, agricultural sustainability, and improvement of life for rural Virginians — through programs offered at its three museums, sports/equestrian complex, and open space. The majority of Morven Park's fields were used as pastures or for growing crops to feed livestock. Davis, along with other progressive agriculturalists of the early 20th Century, utilized innovative and scientific methods to improve the soil, such as leaving fields fallow and planting cover crops. These methods increased the nutrients in the soil and deterred pests, leading to healthier crop yields and providing the foundation for modern agriculture.

Morven Park is near Leesburg, Virginia, approximately 30 miles west of Washington, D.C. **UB**

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Snack time, anytime

In the fast paced world we live in, capitalizing on our available time is crucial—and that includes meal time.

In the age of instant gratification, the millennial generation, especially, seeks easy, fast choices for satisfying hunger—increasing the importance of convenience stores as well as fast casual, fast food, and quick-service restaurants.

Fast food restaurants are finding new and innovative ways to present old favorites like chicken into bite-sized, snack-able, on-the-go meals. QSR chains are taking ethnic cuisines and making them a quick and easy meal for hungry people in a hurry.

Many convenience stores are moving towards offering hot foods and snacks like pizza, hot dogs, and even do-it-yourself microwaveable burritos in store. Snack time in general has gone way beyond the traditional chips and candy bars, and has evolved to include a wide variety of hot and cold snack-able foods and mini-meals.

When I was a kid, and long before that, snacking was considered irresponsible and even unhealthy. “Three square meals a day,” mom always said — and you weren’t supposed to fill up on snacks before supper. Well, more recently studies have shown that snacking (healthy snacking that is) can improve overall health and even speed up the metabolism. Some studies suggest that eating several small meals over the course of the day is better for our overall digestive health than eating three large meals.

According to a recent study by the NPD Group, snack time, especially in the morning, has shown the greatest growth of any eating occasion over the past decade.

Recognizing this growing trend, there is opportunity to be had by all in the food industry. The increasing consumer demand

for quick and easy food items opens the door to new innovations in food, packaging, accelerated heating technology, and creating snack items with a longer shelf life. Yogurts, granola bars, protein bars, fruit cups, veggie dippers, lunch meat, along with a seemingly endless number of ways to eat pizza on a bagel, in a roll, or in a pouch — the types of foods consumers snack on vary widely.

So, whether it’s a new twist on an old classic like crackers and cheese, or a new individually wrapped elegant meal for one, the options are endless for providing consumers with a satisfying snack selection. **UB**

Article contributed by Jamie Chadwick
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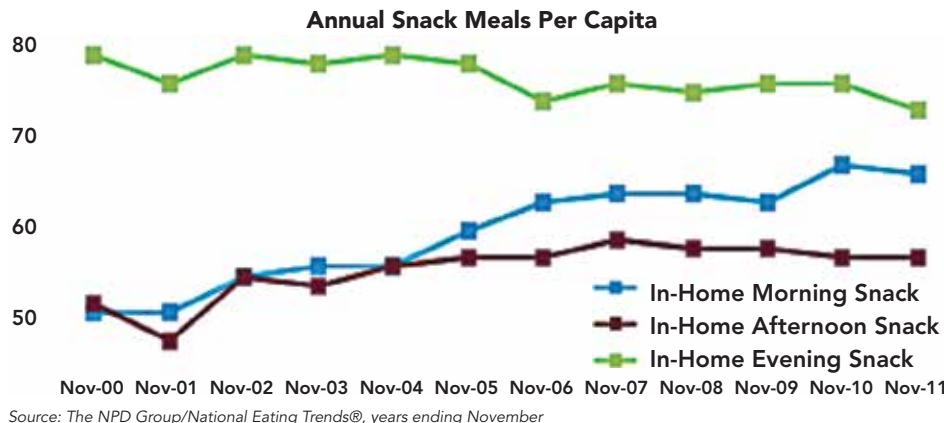


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A switch in protein preferences

The American appetite for red meat has declined in recent years as consumers have flocked to alternative protein choices for both financial and health conscious reasons.

In a special report, "The Changing American Diet" by nutritionist Bonnie Liebman published in the September 2013 edition of the Nutrition Action Newsletter, USDA data indicates combined pork and beef consumption has fallen from roughly 85 pounds per capita in 2000 to about 74 pounds per capita in 2010.

Conversely, the USDA's data said U.S. chicken and fish consumption rose to about 65 pounds per capita.

Liebman attributes the change to Americans' protein preference to a more health-conscious population seeking more diet-friendly food options at both the retail and foodservice level.

A look at recent quick and full service restaurant menu trends indicates consumers are seeking healthier options. McDonald's for example has increased its chicken menu offerings in recent years. Meanwhile, full-service restaurants have increased healthier ordering options on their menus that feature meals low in fat and calories.

But another underlying factor surrounding the center of the plate protein industry is price.

In 2013 beef prices hit record highs on a confluence of factors. Drought across the U.S. in 2011 and 2012 saw grain, and consequently, feed prices to increase. Meanwhile the drought forced ranchers to place more animals in feed yards. To rebuild the herd going forward, industry expectations are for U.S. beef production levels to dwindle into 2014.

This rise in beef prices has been handed down the supply chain. Going back to McDonald's, for the first time in 10 years the world's largest hamburger chain raised prices on its famous Dollar Menu.

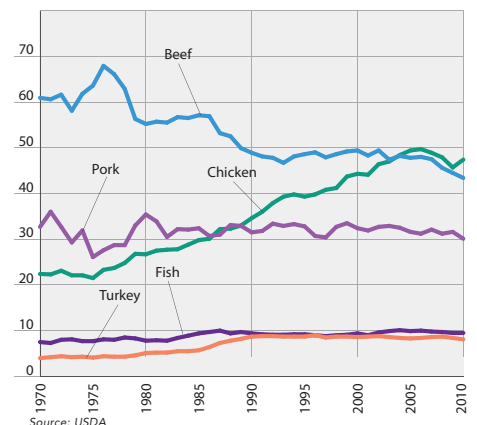


And while chicken prices have also increased in recent years, poultry remains a more cost-effective protein option for cash-strapped consumers in a weak economy.

So while pork and beef consumption continues to trump that of poultry and seafood, an evident shift in consumer preference has occurred, driven by both a health conscious and fiscally mindful U.S. consumer. **UB**

Article contributed by Michael Ramsingh
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US Consumption: Meat, Poultry, & Seafood
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North American Meat Association CEO, Barry Carpenter

North American Meat Association, CEO, Barry Carpenter assumed his position in 2007 following a 37-year career with the USDA. As a USDA senior executive, he administered USDA's Livestock and Seed Program where he directed numerous functions vital to the meat industry, including beef grading and developing standards for meat and livestock. As NAMA's CEO he is a strong voice on issues affecting the meat industry and works closely with regulators on significant issues, including food safety and trade. Barry has received numerous

governmental and industry awards, including the Presidential Rank Award and was recently inducted into the Meat Industry Hall of Fame.

Uner Barry's Reporter had the opportunity to sit down and chat with Barry about some issues affecting the meat industry. Here are some highlights of that conversation:

UBR: *Do you foresee any major impacts on livestock producers and/or processors from the Farm Bill and the lowering of SNAP aid?*

BC: The big question is, Will we get a Farm Bill passed? Unfortunately, Congress seems to be having a difficult time reaching a compromise and moving forward. I do not expect adjustments to SNAP to have any significant impact on livestock producers or meat processors. However, without a bill, important programs remain unauthorized. For the livestock and meat sector there are several critical areas, including provisions that help the industry address its market-access challenges for exports. Most importantly, a Farm Bill is the appropriate vehicle to address the devastating impact of COOL on the livestock and meat industry and on trade with Mexico and Canada, our two largest trading partners. Other potential provisions in the Farm Bill would prevent states from imposing restrictions on animal production practices that risk restraining interstate commerce and would include provisions to address marketing issues.

UBR: *Country of Origin Labeling is a labeling law that requires retailers, such as full-line grocery stores, supermarkets, and club warehouse stores, to notify their customers with information regarding the source of certain foods. NAMA opposes country of origin labeling (known as*



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***"An opportunity
exists to create an
organization that can
collectively represent
the interests of the
industry and its
members."***

COOL). Why do you think some people were so keen to get this law passed?

BC: There's no mystery about why COOL exists. It is clearly an attempt by a minority group of uninformed producers to deny market access for products from our most important trading partners. Under the guise of "consumer desire to know" a mandatory system has been implemented that provides no measurable value while imposing millions of dollars of costs on the livestock and meat industry. The industry has numerous programs that are market-driven and provide information that consumers, through their purchasing decisions, have identified as important. Those range from Certified Angus Beef to organic.

UBR: What are the reasons that you oppose the labeling law?

BC: First and foremost, the law adds considerable costs without adding any value. If continued it will cause drastic changes to our industry to the detriment of producers and processors. We believe that COOL should be market-driven. For those consumers that see value in various labeling schemes, the marketplace will address their demand for products. This has been the model for other consumer preferences like organic, natural, grass-fed and even locally produced.

UBR: What are the chances that the COOL law will be repealed?

BC: It's very unclear, but there is a growing contingent in Congress who understand the seriousness of the issues. Also, the WTO case is continuing to move forward. And we're involved in litigation to get an injunction against the rule on the grounds that it's unconstitutional. We'll see what happens.

UBR: We just had a merger of two organizations (National Meat Association and North American Meat Processors Association) to create NAMA (North American Meat Association). Now there are talks of a potential merger between the American Meat Institute and NAMA. What factors are driving this merger?

BC: We live in a rapidly changing world. The meat industry is no different, and the associations that serve our industry



North American Meat Association CEO,
Barry Carpenter

must continually evolve to best serve their members. An opportunity exists to create an organization that can collectively represent the interests of the industry and its members. The paramount criteria for a merger is the value it would provide to our membership.

UBR: Are they the same ones that drove the NAMA/NAMP merger?

BC: Yes, the desire to continually focus on the needs of our members, and to find ways to enhance services for the advantage of our members and for the industry in total.

UBR: What do you see the strengths and challenges of one large industry organization?

BC: As we explore the possibility, our guiding principle is to see if we can successfully create an organization that would have a unified industry voice providing exceptional industry advocacy, enhanced member services, and inclusive grassroots policy development, while also fostering lasting relationships and long-term prosperity for the benefit of all members. A committee composed of members from each association has been formed to discuss how a new organization could best be structured to meet the needs of its members. The challenge is designing an organization that can effectively and efficiently achieve the objectives stated above. **UB**

Interview questions provided by Joe Muldowney
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Poultry producer receives American Humane Association 'National Humanitarian Medal'

American Humane Association, the first national humane organization and the world's largest farm animal welfare certification program, presented its prestigious National Humanitarian Medal to Gus Arrendale of Springer Mountain Farms at its October American Humane Association Hero Dog Awards™. The only charity dedicated to the protection of both America's children and animals awards the National Humanitarian Medal to visionary leaders whose actions reflect the essential values of compassion, caring and hope.

Recently, the organization announced that it now oversees the humane treatment of nearly one billion farm animals through its American Humane Certified™ program, representing 10 percent of all livestock raised for food production each year in the United States. Mr. Arrendale has been with the program since the very beginning as a visionary leader in the humane movement, bringing the progressive farm animal welfare program to his family's operations. In 2001, Arrendale led Georgia-based Springer Mountain Farms to become the first poultry producer to bear the American Humane Certified™ seal of approval.

Since then, he has been key in educating his fellow producers — as well as retailers and consumers — about the benefits of

third-party animal welfare audits and humane certification.

"I am honored to receive the National Humanitarian Medal from American Humane Association, an organization

I deeply respect and have enjoyed working with, helping to educate my colleagues about why the American Humane Certified™ program is so vital," said Arrendale. "My family

is passionate about the

humane treatment of our chickens, and at Springer Mountain Farms we produce all natural chicken raised on a vegetarian diet without the use of antibiotics, steroids, growth stimulants or hormones."

Arrendale currently serves as president of Springer Mountain Farms, overseeing the day-to-day operations and decisions, but has spent most of his lifetime with the company, representing the third generation of a family dedicated to poultry farming. Even before entering elementary school, he was caring for baby Easter chicks at home, and then taking them to his grandmother's farm to live. Throughout his teenage years, he worked in a number of positions at his family's business from delivering baby chicks to working in the processing facility to delivering the finished products to the supermarkets.

This work ethic allowed him the opportunity to learn the operations of his family's business from the ground up. After receiving a Bachelor's of Science Degree in Agriculture from the University of Georgia, Arrendale returned to the company and helped to develop it into the operation it is today.

Arrendale is also committed to agricultural issues in his state and around the country. Nationally, he serves on the National Chicken Council's Marketing Committee

and is a member of the National Poultry & Food Distributors Association. On the state level, he has served on the Agricultural Technology Research Program's Poultry Advisory Committee at Georgia Tech, was a past president of the Georgia Poultry Processors Association and is also a lifetime member of the Georgia Poultry Federation.

But Arrendale is equally active and dedicated to his community through his commitment to higher education. He

continues to serve as Chairman of the Board of Trustees

at Piedmont College, in Demorest, Georgia, as he has for the past 10 years.

In 2007, he received Habersham County Rotary Club's Vocational Excellence Award, and in 2010 he was presented with the Distinguished Citizen Award by the Boy Scouts of America.

"The agriculture industry is the No.1 economic engine in Georgia, and businesses like Springer Mountain Farms represent the best of what our state's industry has to offer," said Georgia Governor Nathan Deal. "Gus is a leader in environmental stewardship and a truly deserving recipient of this prestigious award."

"Gus has been a special partner for American Humane Association over the years, and we are honored to bestow upon him the prestigious National Humanitarian Medal at the 2013 Hero Dog Awards," said Dr. Robin Ganzert, American Humane Association president and CEO. "He is truly a humane visionary in the animal welfare community, deeply committed to the welfare of all farm animals. Through his leadership by example, he has been instrumental in helping the nation's oldest and largest farm animal welfare program grow at this unprecedented rate."



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Adapted from a story which originally appeared on Foodmarket.com on October 4, 2013

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Make room for the sausage, it's not just all about pork!

Shelf space within any retail establishment is at a premium, and it takes an intense science and vast amounts of market research and data to set up the selection and placement of items within a retail establishment. Demographics play a role in the makeup and placement of items and trends, and new product introductions also influence what the buyers will see when they walk up and down the aisles of the store.

One change within demographics is the health conscious shopper

and the buying choices made within this sector. Specialty stores aside, what are the new offerings of major retail chains and club stores when it comes to sausage?

According to Nielsen, moderate growth in dollars and volume for dinner sausage was seen during a 52 week period ending August, 2013. Their data shows that traditional sausage (Italian sausage and smoked sausage) showed growth and also showed a decline in price. Nielsen concluded the growth for traditional sausage varieties may not be entirely indicative of growing demand and

declining price could have been one of the driving factors.

Nielsen commented that although growth for sausage was moderate, it's not to say innovation in the transitional sausage space isn't happening. Health conscious shoppers have shown an increased interest in sausage options that are made of chicken, sausage and even seafood.

Uner Barry's Reporter gathered some nontraditional sausage varieties that were found in the retail case of Wegman's.

The case was filled with a variety of choices of chicken sausage from flavor rich options to natural and organic varieties. Some of the flavors the Reporter cooked up were organic chicken, spinach & garlic asiago, (a favorite among the staff's tasting), chicken spinach & feta, chicken classic hot Italian, chicken jalapenos & roasted red pepper, and turkey with cheddar. The average chicken sausage nutrition label revealed that the calories varied from 70 to 130 per link with fat content ranging from 2.5 - 7% and protein from 10-14%. This obvious addition to the meat case certainly offers options to those shoppers looking for alternatives to traditional sausage.

Nielsen's data indicated that flavor profiles for some of the top selling items in the case include mozzarella & garlic, spinach & asiago, fajita chicken and sweet pepper. Nielsen commented that new flavors in better-for-you proteins are in demand and that traditional channels will likely experiment while maintaining stable space allocation.

Article contributed by MaryAnn Zicarelli
Maryann@urnerbarry.com



Photograph by Caroline Hirt • Food Styling by James Patterson

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Chicken's charged up market chokes under growth in slaughter

Adapted from an article which originally appeared on UB Newswires October 30, 2013



An increase in 2013 chicken production appears to have quelled a wing market that some believe had been poised for record growth in the fourth quarter.

In 2012 October values for chicken wings were among the highest ever recorded in the industry. Over the last few years consumer appetites for wings have grown substantially, particularly as the protein of choice during the fall football season.

The emergence of wing-centric quick service restaurants including Buffalo Wild Wings and Wingstop commanded even more of a market demand, justifying the price increases.

McDonald's announcement that they too would enter the chicken wing craze late last year helped keep values high. Such a large undertaking required that the world's largest fast food chain start building frozen wing inventories in preparation for their national debut.

However this year, Urner Barry's chicken wings quotations are down nearly 25

percent compared with year ago levels and the unexpected price decline is a result of a few factors.

First, McDonald's Mighty Wings rollout has been less than stellar and the company is currently not playing an active role as a buyer in the current wing market.

Also contributing to this trend is the emerging popularity of boneless wings, which in essence was a marketing response by quick service restaurants to distance themselves from the then, record-high bone-in wing prices.

But what may be the driving factor in declining wing prices is simply more wings.

There has been notable chicken production increases industry wide. This year's number of eggs set and chicks placed have been up each week compared with year ago levels.

Additionally, total and average live weights also increased in 2013 as well as the number of head slaughtered.

For example, a look at broiler slaughter data for the week ending November 16 shows about 153 million head of chicken were slaughtered compared with 151

million head the same week a year before. This means there were about 4 million more wings in the market. On a year to date level, the US broiler slaughter shows that the chicken industry has slaughtered about 87 million more chickens, good for about 174 million wings in this year's market.

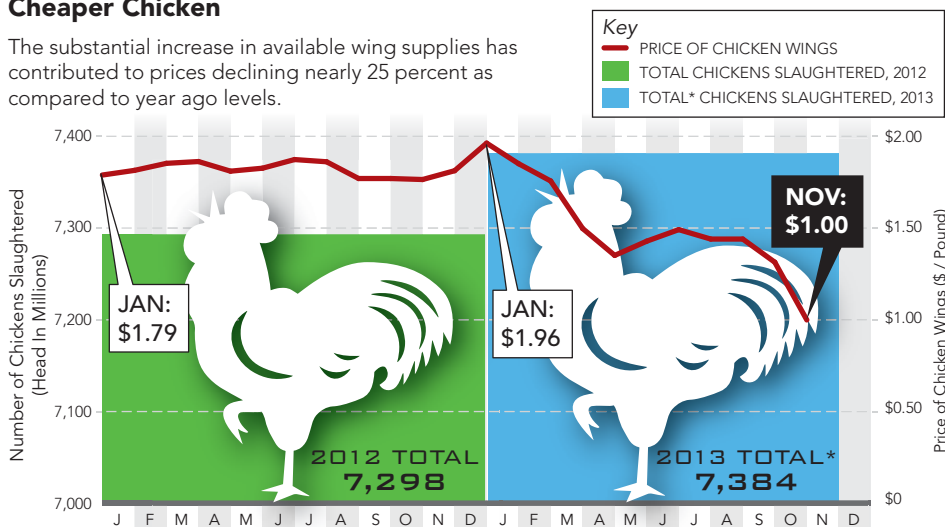
And if you assume an average serving size of 10 wings per order, that's roughly 17 million more servings are available for sale.

So as the wing market heads into 2014 the substantial increase in available supplies currently being generated may mitigate any remaining chance for prices to soar beyond the heights achieved in 2012. **UB**

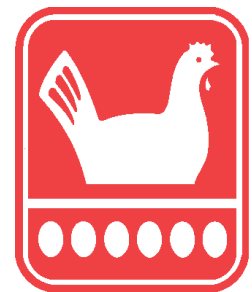
Article contributed by Michael Ramsingh
Mramsingh@urnerbarry.com

Cheaper Chicken

The substantial increase in available wing supplies has contributed to prices declining nearly 25 percent as compared to year ago levels.



*Numbers for December 2013 were not available at press time

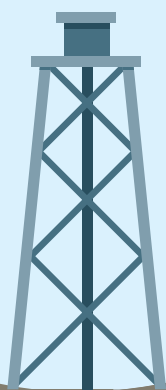


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U.S. crude production hits milestone

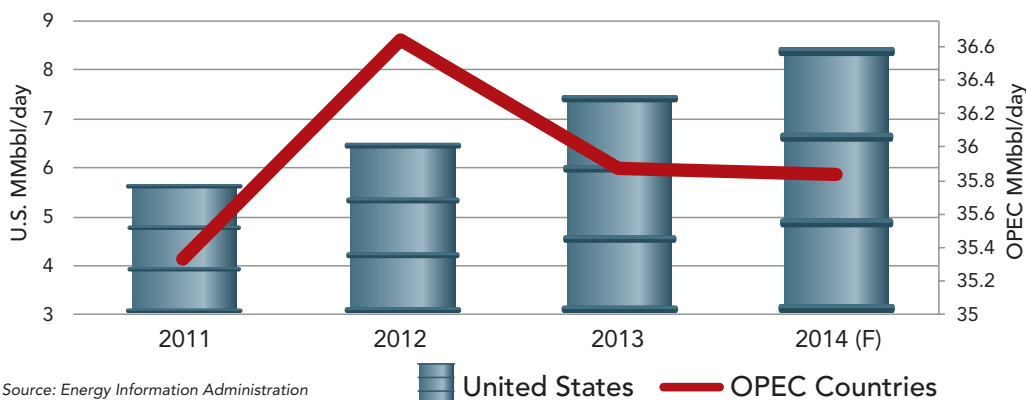
This past October, the United States produced more crude oil than it imported for the first time in almost two decades; since early 1995 to be exact. The Energy Information Administration (EIA) related a surge in domestic shale oil output and the fact that U.S. consumption of petroleum products has remained relatively flat to the presently appealing situation.

The figures mark a milestone in the rebound of U.S. oil production since drillers started using a combination of horizontal drilling and hydraulic fracturing to unlock oil previously trapped in layers of shale rock. At the same time, car manufacturers have made substantial gains in boosting the fuel efficiency of automobiles and other areas of industry have been curbing U.S. oil consumption as well.

In its November Short-Term Energy Outlook (STEO) the EIA highlighted that:

- ✓ The weekly U.S. average regular gasoline retail price has fallen by more than 40 cents per gallon since the beginning of September. EIA's forecast for the regular gasoline retail price averages \$3.24 per gallon in the fourth quarter of 2013, \$0.10 per gallon less than forecast in last month's STEO. The annual average regular gasoline retail price, which was \$3.63 per gallon in 2012, is expected to average \$3.50 per gallon in 2013 and \$3.39 per gallon in 2014.
- ✓ The North Sea Brent crude oil spot price averaged nearly \$110 per barrel for the fourth consecutive month in October. EIA expects the Brent crude oil price to decline gradually, averaging \$103 per barrel in 2014. Projected West Texas Intermediate (WTI) crude oil prices average \$95 per barrel during 2014.
- ✓ The projected discount of the WTI crude oil spot price to Brent, which averaged more than \$20 per barrel in February 2013 and fell below \$4 per barrel in July, increased to an average of \$9 per barrel in October. EIA expects the WTI discount to average \$10 per barrel during the fourth quarter of 2013 and \$8 per barrel in 2014.
- ✓ U.S. crude oil production averaged 7.7 million barrels per day (bbl/d) in October. Monthly estimated domestic crude oil production exceeded crude oil imports in October for the first time since February 1995, while total petroleum net imports were the lowest since February 1991. EIA forecasts U.S. crude oil production will average 7.5 million bbl/d in 2013 and 8.5 million bbl/d in 2014. **UB**

Crude Oil Production



U.S. daily crude oil production has advanced 33% since 2011 and is forecast to grow by another million barrels per day in 2014.

Article contributed by **Russell W. Whitman** | Rwhitman@urnerbarry.com

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Seafood market issues eclipse sustainability as focus at GOAL 2013



Adapted from an analysis By John Sackton
which originally appeared on October 10, 2013
on Seafood.com News



At the Global Aquaculture Alliance's (GAA) GOAL 2013 meetings in Paris held from October 7 to the 10, it appeared that market issues eclipsed sustainability in these major industry meetings.

The reason is a growing recognition that sustainability is being addressed by the seafood industry – both on the aquaculture side, and on the wild harvest

side, so that the question of 'how to do it' now applies to selling seafood - not making it sustainable. For example, 95% of U.S. seafood is recommended now by the Monterey Bay Aquarium, and BAP or ASC certified shrimp make up the majority of U.S. shrimp sales.

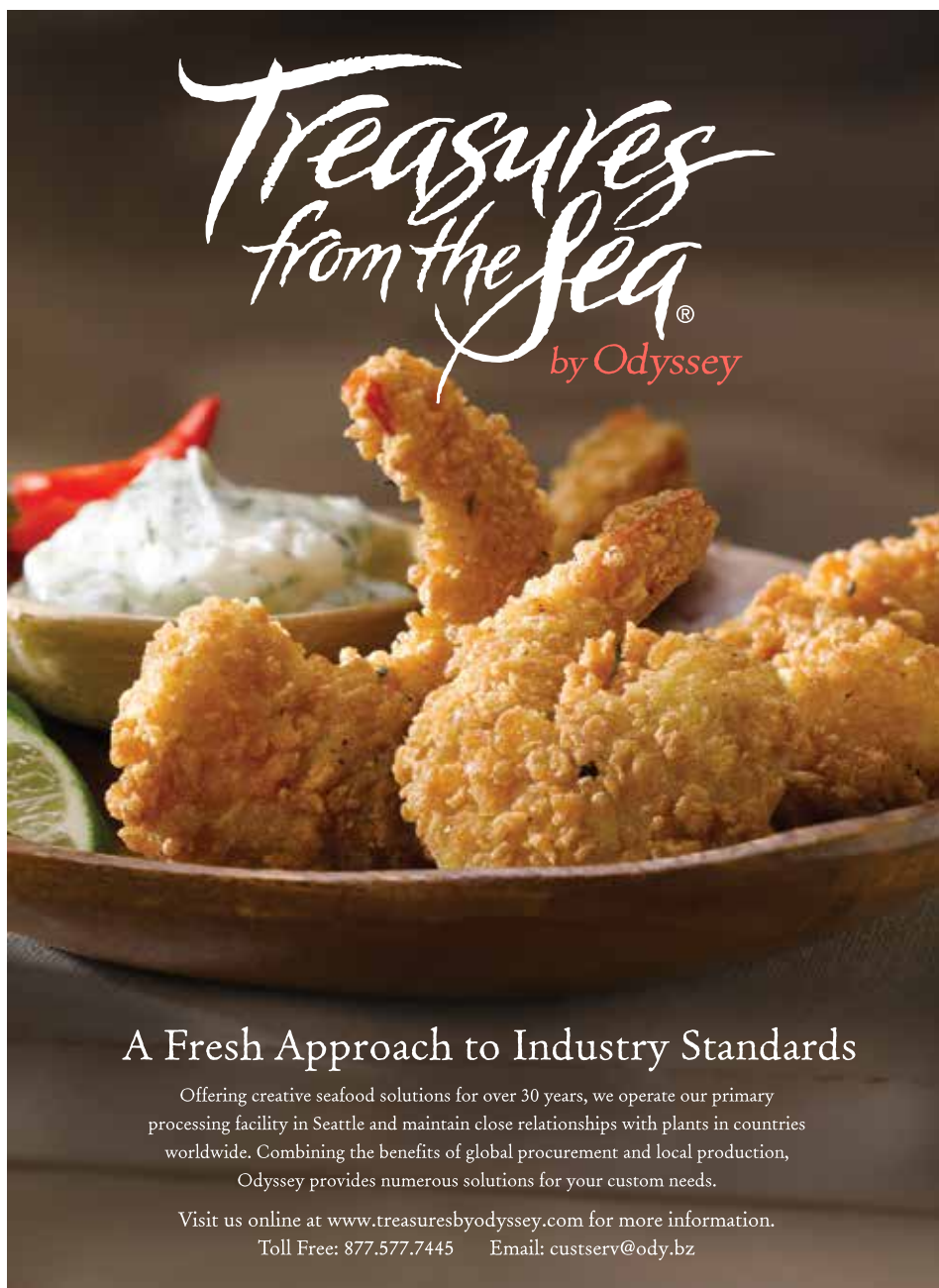
This emphatically does not mean that sustainability is not important. Rather, as every retailer on three panels affirmed at one morning meeting, they are all committed to their individual sustainability and corporate responsibility standards regardless of the particular market situation.

There was remarkable unanimity around several ideas.

First, sustainability was not a 'negotiable' commitment. "There are going to be peaks and troughs, biological and supply challenges. But it doesn't change the way we approach things," said Ally Dingwall, aquaculture and fisheries manager for Sainsbury's.

Second was a widespread willingness to work with suppliers to move towards sustainability goals if they were not currently being met. In other words, the era of black and white sustainability choices is over: there is no magic bullet that says if everything is certified, our problem is solved. There were many differences between the various retailers on the panels about the evolution of each of their sustainability programs. In one way or another all emphasized, their commitment to engage with problem fisheries, and to support efficiencies in standards where possible.

The MOU between Global GAP, Aquaculture Stewardship Council and the GAA's Best Aquaculture Practices was held up as a model that reduced costs, certified sustainability, and also allowed customers to still retain the choice of which standard or certifying body they wanted to use. As a result, many supported the GSSI initiative, so long



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as it produced a credible and defensible approach to standardization.

Retail panelists included ASDA, Morrison's, Sainsbury's, Wegmans, Price Chopper, Delhaize, Sam's Club and BJ's.

Third, customers are going to react to high prices by seeking alternatives. Here there was not unanimity. Bob Fields, representing Sam's Club, said "even though prices are on the rise, the consumer will pay the price for high-quality product as long as the eating experience delivers." He says they do not want to lower quality level and risk changing the eating experience.

However, Scott Williams, representing BJ's, said they had a \$9.99 price point for a bag of shrimp, and as prices rise, they will offer smaller sizes to try and keep the same price point. They will also adjust the weight of the bag. He says if they try and go above that \$9.99 price point customers will just stop buying. He also said another alternative was to try and switch some of that business to value added.

At one point in the session, the audience was asked whether they thought the broadening of certification schemes beyond the MSC label such as the Alaska and Iceland RFM certification was a positive or negative development. By a 2-1 margin the audience thought it was positive, although some also did not have an opinion.

Overall, the GOAL conference was focused around EMS and disease management issues related to supply, which came up again and again; development of feed sources which will be necessary for future

growth, and whether there are new production areas that one day may support large scale aquaculture production.

In looking at the October 15-17 Groundfish Forum Vienna, besides the focus on data, the second day focused on marketing. In the past there has been a lot of discussion of sustainability at this forum, but with surging whitefish stocks and the management programs in place, it seems the industry is ready to move beyond this topic. Instead of focusing on how to ensure sustainable supplies, the focus this year will be on how to sell what is there — especially with the growth in global cod stocks.

Strategies for pollock are another set discussion, as this year Russian pollock fisheries have become certified.

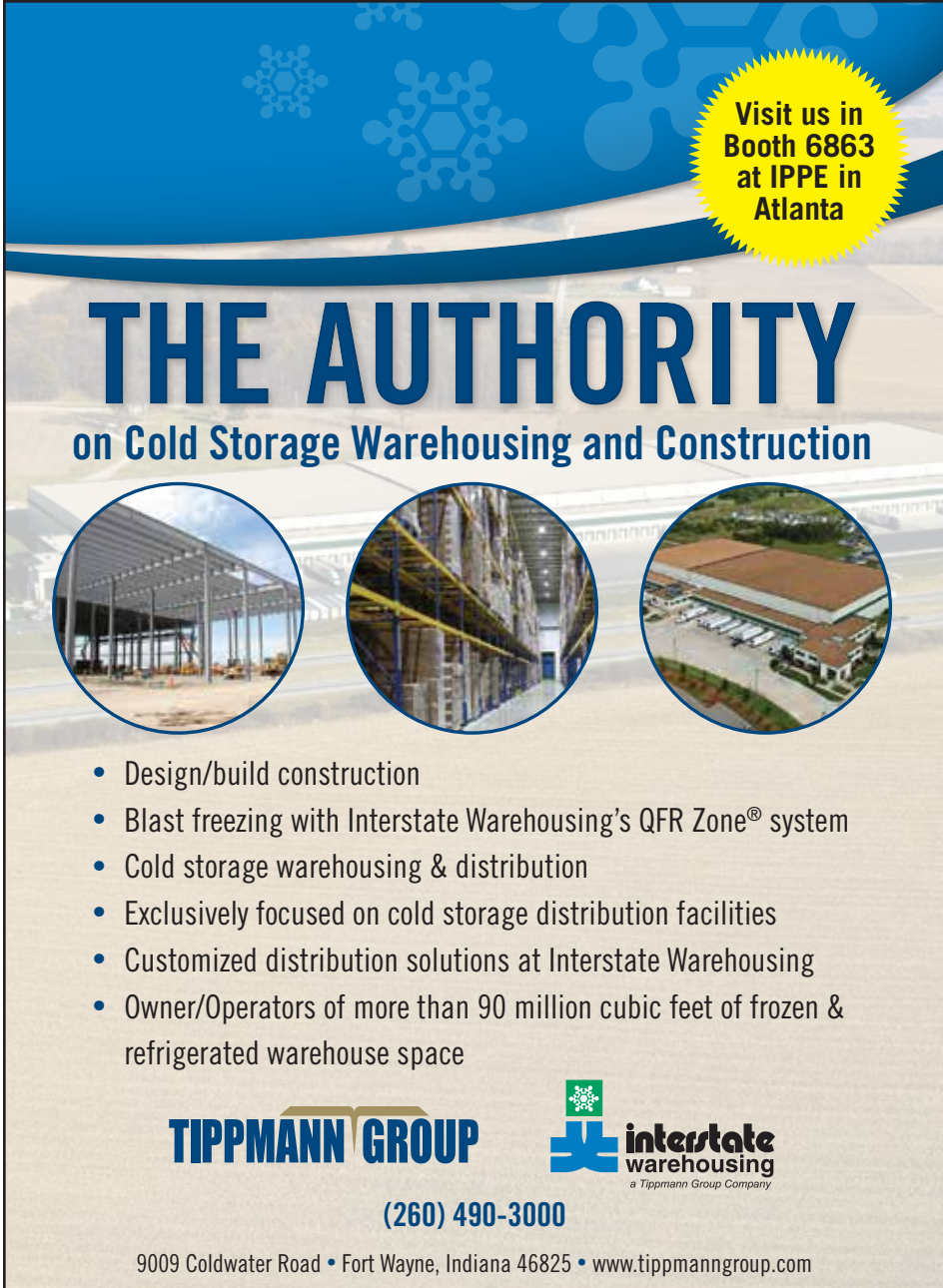
Outside of cod and pollock, which are a big exception, prices of most fish and seafood are rising at a time when economic recovery in the U.S. and Europe remains very sluggish. Groundfish sellers have an opportunity to regain some of their market share given the rise in price in shrimp, salmon, tilapia and pangasius. The question will be how to do this profitably, and avoid a price slump that will push margins into dangerous territory. **UB**



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GOAL 2013 Conference attendees and the "tour de Urner Barry"

In October of 2013 Urner Barry gathered with a contingent of seafood professionals attending the Global Aquaculture Alliance's (GAA) GOAL 2013 Conference in Paris on a bike tour around the French capital.

Just over 40 of the conference's attendees signed up for the Urner Barry organized event that was conducted through Fat Tire Bike Tours.

On October 9, day three of the GOAL Conference, riders were led on a three-hour tour of the iconic city. The group of GOAL riders was easily recognizable with custom shirts designed by Urner Barry that meshed the seafood industry with a bit of biking flare.

The tour's highlights included the Eiffel Tower, Napoleon's Tomb and the Louvre Museum, among other notable city spots. All in all, the riders made six unique stops and took in countless more sights and sounds along the route.



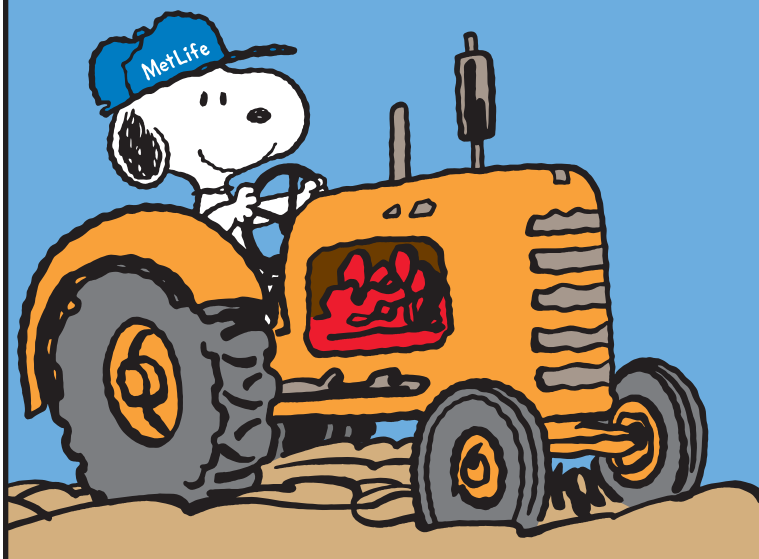
The GOAL 2013 Conference featured three days of lectures surrounding the global state of the aquaculture industry at Paris' Hotel Pullman.

About 50 speakers and panelists participated at this year's event with discussions featuring early mortality syndrome in shrimp, feed sustainability, aquaculture growth opportunities in the Middle East and Africa, meeting the needs of Europe's discerning buyers and the latest farmed seafood production data and forecasts.

In addition to hosting the bike tour, Urner Barry was among the group of proud sponsors for the 2013 Conference.

As for next year, GAA will bring the GOAL Conference back to Vietnam for the first time since 2005 with the 2014 installment of the event heading to Ho Chi Minh City. **UB**

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Some of the GOAL 2013 Conference attendees that participated in the Uner Barry organized bike tour around Paris. The tour's highlights included the Eiffel Tower, Napoleon's Tomb and the Louvre Museum.

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LaMonica Fine Foods' conch product featured on Travel Channel's 'Bizarre Foods'

New Jersey-based seafood company LaMonica Fine Foods showcased its hand shucking clam and conch canning operations to a national audience during



LaMonica Fine Foods was featured in the season 5 premiere of the Travel Channel's Bizarre Foods with Andrew Zimmern.

the November 4, 2013 premiere of the Travel Channel's Bizarre Foods with Andrew Zimmern television show.

The program's fifth season premiered in the Garden State, with the show's host Andrew Zimmern taking a tour of Millville-based LaMonica's clam and conch distribution operations.

This was LaMonica's first foray into television production, unlike Bizarre Foods, which has had a number of encounters with the seafood industry.

"We have profiled many other commercial fishermen and commercial seafood processors around the country: shrimp and clam processors in South Carolina, a new octopus fishery off the coast of Georgia, sea urchin processors in San Diego,

oyster processors in Massachusetts and Texas, a geoduck farm and processor in Washington State, and many more," said Bonnary Lek, communications manager for the Travel Channel.

For LaMonica, the national spotlight marked a significant marketing accomplishment for the 80-year-old company. LaMonica is the country's largest hand shucking clam facility and the only domestic canner of conch and whelk in the United States.

Though the show may be known for investigating 'bizarre' foods found throughout the world, Zimmern and crew also profile unique foodservice operations; criteria that LaMonica's company spokesperson Kim Beardsworth says LaMonica fit perfectly.

"Our hand shucking process for our Clams is second to none. We are the only domestic canner of Conch, which traditionally has been a staple of Italian-Americans and is gaining popularity in mainstream America. Our newest product, Petite Scungilli (Whelk) is totally new to the canned seafood category and has been received very well," said Beardsworth. "This show will help us to demonstrate our commitment to quality products, showing the process of shucking and plucking, all which is done by hand."

In fact it was LaMonica's offbeat production process that originally nabbed attention from the Travel Channel said Lek.

"The pre-production team knew that the seafood industry is an important part of New Jersey's history and current economy.



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"This show will help us to demonstrate our commitment to quality products ..."

We love to shed light on things that folks outside a community know little about. We were looking for clamming in Cape May and LaMonica came up in our research. When we found out that they process whelk and have a great history in the region, we were sold,” said Lek.

Once production was underway, LaMonica’s owners Danny and Michael LaVecchia were impressed with the production crew’s professionalism and vested interest in the food and seafood industry said Beardsworth.

“Danny and Michael were amazed to see how quickly Andrew jumped into the operations and got involved with the processes and our employees,” said Beardsworth. “He fit right in!”

Lek said LaMonica was equally accommodating.

“It was fun to work with an Italian American family that’s sustaining, evolving, and growing a generations old business,” Lek said.

Meanwhile Lek said the Travel Channel said the episode exposed a lost side of New Jersey’s culture and economy.

“We love the idea that a state that is widely characterized by outsiders as an expanse of urban grit, in truth, has great commercial fishing and agriculture. We hope that viewers will be surprised and impressed, and maybe even go out and try some New Jersey scungilli,” Lek said. **LB**

Article contributed by Michael Ramsingh
Mramsingh@urnerbarry.com



Zimmern, with production crew in tow, toured LaMonica’s clam and conch processing operations.

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Chilean salmon production returns to pre-ISA form

Chilean salmon output hit record volumes on its return to pre-ISA levels in 2013, which was absorbed by a surge in demand from Brazil while imports from traditional importing markets remained strong.

Through October 2013 Brazil imported 140.6 million pounds of Chilean salmon, about a 20 percent increase compared with year ago levels.

This is a continuation in Brazilian demand for Chilean salmon that started when Brazil imported 17 percent more salmon in 2011 compared with 2010 figures. In 2012, Brazilian salmon importers ramped up buying even more; importing 149 million pounds of Chilean product or nearly 50 percent more product from the year prior.

Naturally, as the Brazilian market for Chilean salmon has grown over the years, so has the country's overall market share for salmon. Brazil inched up its take of Chilean salmon from 12.2 percent of the market in 2011 to 14.5 percent of the global share as of October 2013.

Meanwhile, the U.S. — traditionally among Chile's top exporting markets — continued to increase its salmon shipments from Chile.

U.S. imports from Chile have increased steadily since 2010. In 2012, U.S. imports of fresh Atlantic salmon fillets increased 71 percent to 159.9 million pounds versus 2011 figures.

In 2013, the U.S. increased its imports of fresh Atlantic salmon fillets from Chile by 12 percent through October, to 147.8 million pounds. Currently, the U.S. is the second best market for total Chilean salmon, accounting for over 23 percent of the global market share.

These notable increases in salmon exports from Chile have occurred along with substantial production increases from the Latin American country since recovering

"Naturally, as the Brazilian market for Chilean salmon has grown over the years, so has the country's overall market share for Atlantics."

from the ISA crisis that crippled the industry's production in 2009, 2010 and 2011.

According to Info Trade, Chile exported 969.8 million pounds of salmon through October 2013, a 13.5 percent increase over year ago levels.

Though the jury remains out on what to expect from Brazilian salmon buyers

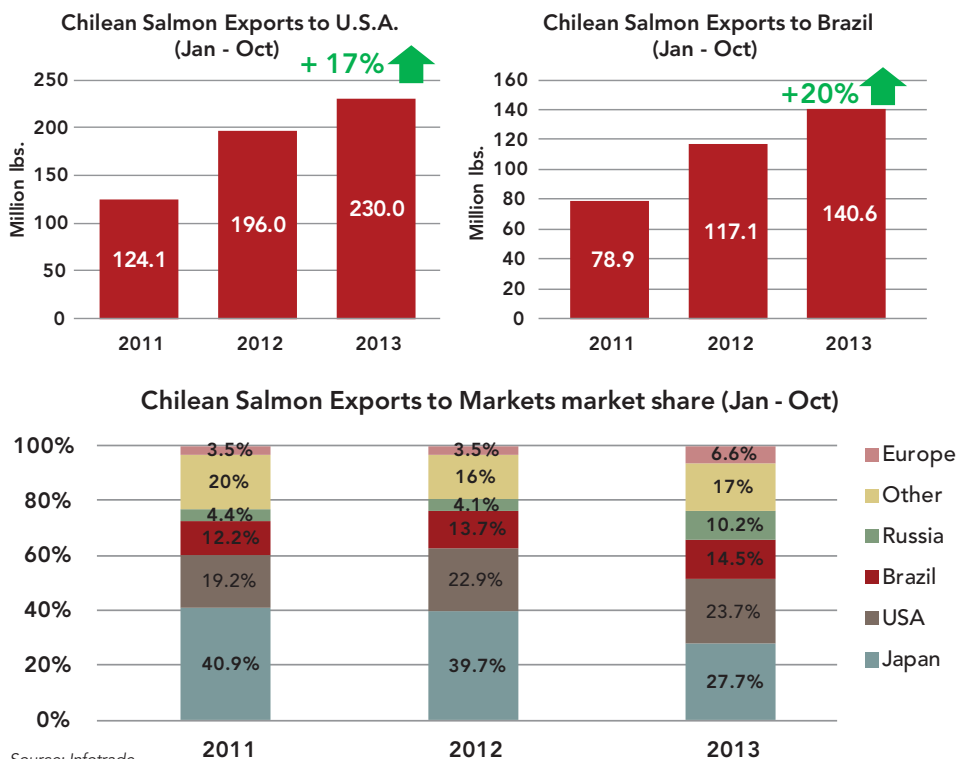
going forward, both Chile and Brazil have committed to a number of salmon marketing campaigns during the year. The countries reported success in a retail promotion campaign in 2013; moreover, Chile and Brazil have partnered to promote Chilean salmon products for the upcoming 2014 FIFA World Cup and 2016 Summer Olympic Games.

So as Brazil has boosted its market share for Chilean salmon, across-the-board import increases from other top markets indicate the global market was prepared for the return of pre-ISA level Chilean salmon production.**UB**

Article contributed by Michael Ramsingh
Mramsingh@urnerbarry.com

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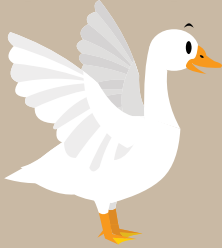
Adapted from an original Seafood.com News article published October 10, 2013



Are you a **Bird Nerd?**

1. Once, when the Air Force was conducting test runs and breaking the sound barrier, a number of these birds that were out in the field were also found to have dropped dead after suffering heart attacks.

A) Chickens
B) Geese
C) Wild Turkeys
D) Ducks



2. These birds will lay brown eggs if they have red earlobes and white eggs if they have white earlobes.

A) Chickens
B) Ostriches
C) Turkeys
D) Quails



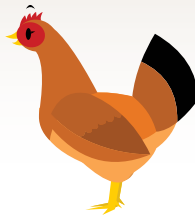
3. Protected under the Migratory Bird Act of 1918, these birds have a wingspan of more than 6 feet and can reach speeds of 30-40 MPH while flying.

A) Chickens
B) Canada Geese
C) Wild Turkeys
D) Ducks



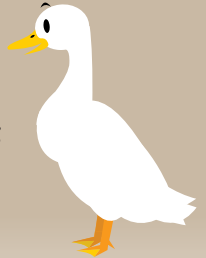
4. The greatest number of yolks to ever be laid in a single chicken egg was:

A) 5
B) 7
C) 9
D) 11



5. These birds are the fastest of the bird species, although flightless, their running speed can reach more than 40 MPH.

A) Turkeys
B) Ostriches
C) Chickens
D) Ducks



Quiz prepared by Terence Wells
Twells@urnerbarry.com

Answers
1. C Wild Turkeys
2. A Chickens
3. B Canada Geese
4. C 9
5. B Ostriches

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Strong growth of Mexican beef exports seeking new markets

Exports of Mexican beef have skyrocketed in the past few years soaring from 70.6 million pounds in 2008 to 330.5 million pounds in 2012; the result of notable production growth combined with the country's drive to create its own reputable "Mexican Beef" brand for export markets.

According to the Mexican Beef Feedlotters Association's (AMEG) Mexican Beef Exporters Association (Mexican Beef), a combination of export growth and Mexican domestic market demand have absorbed the country's substantial production increase.

In fact, assuming 2012 beef demand constant, production growth would have resulted in an oversupply in the domestic market were it not for overseas shipments; an argument, the numbers indicate is true.

For example, exports of Mexican beef have increased 48% on average year over year since 2008—or 65 million pounds per year. Conversely, imports, which mostly come from the U.S., have declined steadily over the past few years. As reported by AMEG with data from Mexican trade authorities, beef imports declined 47% since 2008.

Using the available data from SAGARPA, the equivalent of the USDA in Mexico, production increased 77.6 million pounds on average per year from 2003 through 2012; or about a 2.2% growth rate. In 2012, Mexican beef's three main export markets were the U.S., Russia and Japan; accounting for 63, 18, and 17 percent respectively of the total market share.

"...exports of Mexican beef have increased 48% on average year over year since 2008—or 65 million pounds per year."

However, "change is the only constant in the market," said one Mexican Beef executive.

And in 2013 this sentiment rang true.

In February, Russia halted imports from Mexico and other countries. This situation had a huge impact on Mexican beef exports as existing product destined for Russia, along with any long-term production intended for the country, now needed a new export market. As a result, the domestic market absorbed the excess

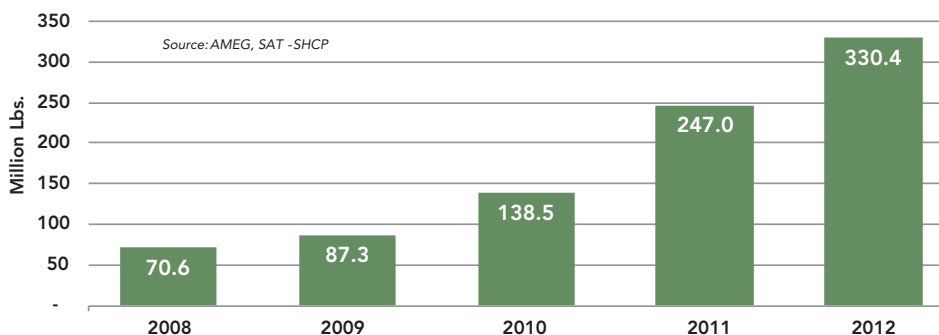
product, while shipments to the U.S. increased.

According to the USDA, U.S. imports of Mexican beef have increased more than 15 million lbs., or 7.5 percent through October 2013 compared with the same period a year ago. However, total exports declined 18.33 percent during the same period in 2013, largely due to Russia's import ban. Production, however, has remained virtually the same in 2013 when compared to 2012.

Since 2007, Mexican beef has been sold to 14 different markets and the goal is to continue this trend as markets around the globe are steadily opening to new products. In addition, Mexican beef is in sights for expanding its presence in the U.S., as well as new export markets including Canada, Chile, China, Singapore, Europe (among other countries), for Mexico's blossoming beef production industry. **LB**

Article contributed by Angel Rubio
Arubio@urnerbarry.com

Annual Exports of Mexican Beef

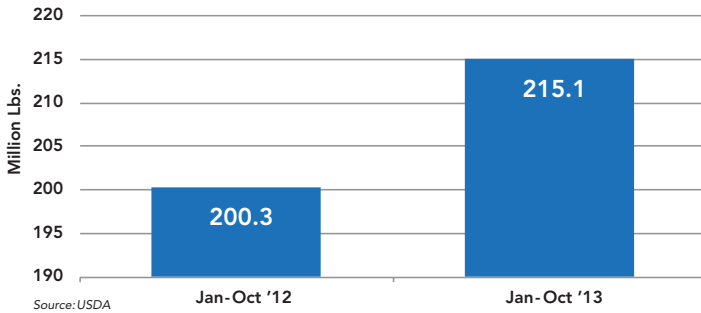


SAGARPA

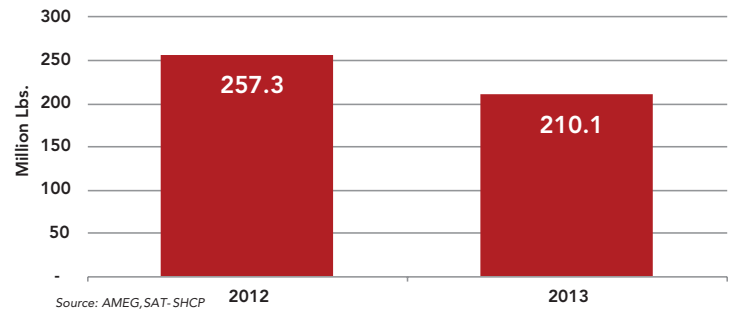
SECRETARÍA DE AGRICULTURA,
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YTD U.S. Imports of Mexican Beef



YTD Exports of Mexican Beef (Jan - Sep)



SAGARPA
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PESCA Y ALIMENTACIÓN



Beef burgers bested by boar?



Urner Barry Burger Taste Test panel. Left to right: Terence Wells, MaryAnn Zicarelli, Caroline Hirt and Brian Moscogiuri.

The burger boom of the past several years has seen an explosion in the variety of hamburger offerings. In some cases, the differentiation from burger to burger is subtle. Some might use ground beef from Angus cattle, others might use a certain cut such as sirloin, or brisket or chuck. Others look for an even greater point of differentiation. This is seen on burgers that contain ingredients from different species such as elk, Bison and the like.

So how do some of these different offerings stack up against the traditional beef hamburger? What makes one burger taste better than another? By burger we are referring to the actual patty. Urner Barry's Reporter conducted an extremely unscientific survey to see if insight as to what makes a great burger could be gained.

We were able to purchase the traditional items for our taste test from our local

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supermarket. This included 80/20 ground beef, veggie burgers and even bison! We also included some turkey burgers which were left over from a company barbeque that was held during the summer (those things keep for a while, right?)

We ordered some more exotic meats from an online store. The order was for burger patties of buffalo, elk, venison, antelope, and kangaroo. The items that were actually delivered to us were kangaroo, buffalo, two venison patties and wild boar. Most of the frozen patties ordered online were professionally labeled with the exception of the wild boar, which was labeled by someone scratching the words "Wild Boar" with a permanent marker. This unconventional labeling triggered our first casualty of the study. One of the less adventurous people on our tasting panel immediately dropped out upon seeing the magic marker label.

While we did not receive exactly what was ordered, we were too short on time to have the online vendor send us the missing antelope and elk. Resolute in our duty to get the story into this issue of the *Reporter*, we pushed on with the materials we had.

As we inventoried the products to start our test, we ran into our next challenge. The kangaroo burger had disappeared from the company freezer. What happened to the kangaroo burger, did someone inadvertently take it? Was it thrown out by accident? Several company-wide emails were sent. Investigations were launched. Eventually it became clear that the goods would not be recovered. Words cannot adequately express our disappointment at the exclusion of the kangaroo burger. It would have been a special part of the test. The bright, almost



A favorite restaurant of Urner Barry hosted the Burger Taste Test where the establishment's professionally trained chef prepared all of the burgers on a flat top grill in the same exact manner.

neon red color of the frozen patty made us think that this burger would have somehow been more special than all of the others ... Yet, we will never know ...

It was decided that in order to make the comparisons as comparable as possible, the preparation method for all of the burgers needed to be the same. So, we embarked to our favorite local restaurant where a professionally trained chef prepared all of the burgers on a flat top grill in the same exact manner.

All burgers were to be made with the patty, roll, tomato, lettuce, and ketchup.

With our panel assembled at our testing facility, we started the test. Our tasting team consisted of four people of somewhat different eating experience backgrounds. Terence, one of Urner Barry's newest market reporters covering chicken and turkey, gained his burger experience from his frequent visits to quick service restaurants — he eats out approximately five times a week.

MaryAnn, Urner Barry Events Coordinator and seafood market reporter, likes to dine out in New York City and is known to try a wide variety of foods. She also plans all the menu's for Urner Barry's annual Executive Conference.

Caroline is a graphic designer in the company's printing department. She describes herself as health conscious and cooks more at home rather than going out to eat.

Brian is an Urner Barry egg market reporter who also does some marketing work in the company. He likes to hunt and eats what he kills.

Each burger was split into four portions. While panelists were told the items that would be prepared, they did not know what each burger was made of as they tasted it. Panelists were asked to rate each burger on the attributes of appearance, aroma, texture, "gaminess," consistency and overall flavor. A rating of "1" meant the item had a low rating for the attribute



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and a rating of “5” was a high rating. The attribute of gaminess is perceived to be a negative so those scores were deducted from the overall total. The test was also recorded on video so we could capture first impressions and comments (be sure to check out the video by following the QR code or following the link at the end of this piece). Jamie Chadwick, one of our account managers and “on-air talent” for our daily video news report conducted the test.

Looking at the test results, we found some surprises while other results were somewhat expected. The hands down winner of the test was the burger made with conventional 80/20 ground beef. It scored extremely high in all categories logging a 23.25 out of a possible 24 points. This was also the cheapest burger in the test.

The wild boar, the big surprise of the day, came in second (the one that was labeled with the marker). Our panel scored it 17/24 and most in the panel actually thought that it was organic beef. One interesting note, while the burger was being prepared our chef called us into the kitchen to show us how much fat it

actually contained. We think that pork fat is likely the reason that the wild boar burger was so positively received.

The buffalo burger purchased from the online store and the burger made with bison meat that we purchased from the supermarket tied for third place scoring 14.5/24. We initially included those two items hoping the “buffalo” purchased from the online store was actually a water buffalo. Calls to the online store were not returned. However when we went back to the site for a description, we found a photo of a bison next to the buffalo burger description — so we’re assuming it’s a bison burger.

Scores for both bison burgers were fairly similar. The chef said there was some difficulty getting the bison meat purchased from the supermarket to bind together and described the meat to be somewhat



Each burger was split into four portions for each of the panelists to sample.

“watery.” We think the leanness of the meat had something to do with this.

Not far behind the bison was the grass-fed organic beef, scoring 14.25/24 and coming in fifth out of the eight tested burgers. At 85% lean, this burger was leaner than the conventional ground beef purchased from the supermarket. We wonder if the lack of fat and the beef being grass fed affected the gaminess score on this item as it had one of the higher scores in this category.

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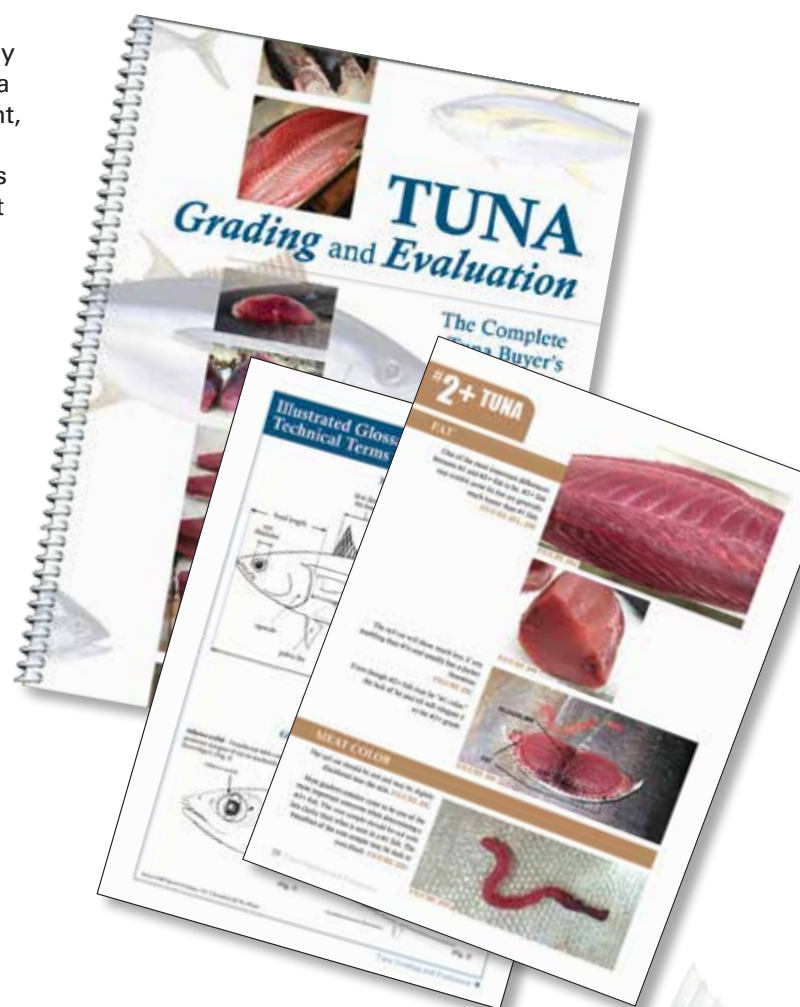
by Robert DiGregorio

This easy-to-use handbook takes all the mystery and guesswork out of grading tuna. Learn how to knowledgeably discern the differences between a Grade #1, #2+ and #2 tuna while also gaining expert insight on how to judge fat content, color and freshness. This practical publication will also act as a guide to the most commonly seen diseases and defects in tuna, allowing buyers to be aware of all the maladies that can affect the quality of the fish they are buying. With the inclusion of stock assessments, national and international regulations, tuna farming, statistics on supply, production, and consumption, **this book will serve as a guide every tuna trader should have!**

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The turkey and veggie burgers scored sixth and seventh in the test. Because this was a blind taste test and mostly about the eating experience, our tasters could not score any perceived health advantage in their review.

Coming in dead last was the venison. Brian, our hunter scored it very high on gaminess and did not want to eat more than one bite. It also scored very low on appearance and aroma. While items like venison loins do well at high end restaurants it was not received well by our testers as a burger.

So what did we learn from all of this?

1. Fat = flavor — the good type of flavor favored by our panelists.

2. A higher retail burger price did not necessarily correlate with increased eating satisfaction.

3. Don't judge a book by its cover. While we went out on a limb with the wild boar burger where someone had implemented a hand written label to their product, we are glad we took the leap. Although we're not sure that we'd take the chance again.

4. Taste might be just one component of a purchase decision.

Caroline said she searches out organic foods whenever she can, and possibly she might prefer organic items for perceived

benefits other than taste. But in the end she really liked the taste of the "real" hamburger.

For more on the hamburger taste test, check out the video at www.urnerbarry.com/video/burger

Article contributed by Joe Muldowney
Joemo@urnerbarry.com



Video by Maria Morales



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Burger Rankings			
Item	Purchase Source	Purchase Form	Cost/lb.
1. 80/20 Beef	Supermarket	Tray	\$1.79
2. Wild Boar	Online	Frozen Patty	\$18.00
3. Buffalo	Online	Frozen Patty	\$9.99
4. Bison	Supermarket	Package	\$9.99
5. Organic Beef	Supermarket	Package	n/a
6. Veggie	Supermarket	Frozen Patty	\$2.25
7. Turkey	Supermarket	Frozen Patty	n/a
8. Venison	Online	Frozen Patty	\$4.99

Panelists were asked to rate each burger on a scale of 1 to 5 (1 being least, 5 being best) on the attributes of appearance, aroma, texture, "gaminess," consistency and overall flavor.

Buffalo (Probably Bison)						
	Appearance	Aroma	Texture	Gaminess	Consistency	Overall Flavor
Terence	2	2	2	1	2	2
MaryAnn	5	5	4	1	3	4
Caroline	4	4	3	2	3	4
Brian	3	4	2	1	3	2
Average	3.5	3.75	2.75	1.25	2.75	3

Ratings 1 (low) to 5 (high)

The buffalo burger and the burger made with bison meat tied for third place in the rankings scoring 14.5/24.

Wild Boar						
	Appearance	Aroma	Texture	Gaminess	Consistency	Overall Flavor
Terence	4	5	3	2	3	4
MaryAnn	5	2	1	1	2	1
Caroline	5	5	4	2	4	5
Brian	5	5	5	3	4	4
Average	4.75	4.25	3.25	2	3.25	3.5

Ratings 1 (low) to 5 (high)

The wild boar burger was the big surprise of the day. Our panel scored it 17/24, ranking it in second place among our entries.

80/20 Ground Beef						
	Appearance	Aroma	Texture	Gaminess	Consistency	Overall Flavor
Terence	5	5	5	1	5	5
MaryAnn	5	5	5	1	5	5
Caroline	5	5	5	2	4	5
Brian	5	5	5	1	4	5
Average	5	5	5	1.25	4.5	5

Ratings 1 (low) to 5 (high)

The hands down winner of the test was the burger made with conventional 80/20 ground beef.



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Poultry flight 101: U.S. to Russia roundtrip

In September 2013, First Fresh Foods, which operates within Prime Pak Foods in Gainesville, GA, announced that it would begin manufacturing and marketing Russian-style chicken products for sale and distribution here in the United States. Initially, one might look at this announcement and not think much of it, but in fact, as simple as it may seem, this



is only the latest chapter to be written in a much deeper story.

It all began back in the early 1990s when Russia emerged as the U.S. poultry industry's largest export market. By the mid 1990s, U.S. processors became quite dependent on Russia's active role. However, all well-written stories include some sort of conflict, and in this tale it was the Russian government that delayed the plot.

At the time, Russia felt that its national poultry industry was being threatened. In an attempt to eliminate the U.S. as competition, Russia banned U.S. poultry



exports. The ban lasted for a month and could've lasted even longer if it weren't for a meeting that took place in Moscow between several U.S. poultry industry leaders, Russian

government officials, and Russian poultry industry leaders. The main objective was to reopen the Russian markets; it would have been devastating if the ban had lasted for any significant period of time, since by then, Russia was importing over 1 million metric tons of U.S. leg quarters each year. But what would entice Russian officials enough to lift their heavy hammers?

After some debate, the group, which included members from the NCC



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(National Chicken Council) and USAPEEC (USA Poultry and Egg Export Council), came up with a plan to end the ban. Their idea was to introduce Western production and processing techniques to Russia; while simultaneously helping to improve a struggling company in Moscow. Of course, there were a few hurdles that the U.S. had to jump over before the Russians would agree to any terms. The main one being a combined contribution of \$15 million from the U.S. Government and U.S. Poultry Industry. Yes, it was a pretty sizable investment, but if it could lift the ban, many felt that it would be worthwhile.

Then, after sifting through over eighty Russian applications, Elinar Broiler of Moscow was selected as the project company. Before getting any further involved and in an attempt to protect the association, USAPEEC set up the UIPDP (USAPEEC International Poultry Development Program), a 501 c3 nonprofit organization, which would take on the leading role in working with Elinar Broiler. UIPDP's objective was to aid in the enhancement of the chicken company's food safety, sustainability, promotion of economic development and consumer acceptance. Even though many observers thought that the project would fail, UIPDP leaders were confident and so they got started. First, U.S. managers were brought in to oversee the everyday plant operations. If Elinar Broiler was going to be a model plant for Russian government officials and poultry industry leaders alike to observe Western practice, then it needed the right personnel. Over the years, one of the men brought in to run the plant was a man named Alan Habegger, who we'll bring up again a little later. By the end of 2009, Elinar Broiler had completely turned its misfortunes around, becoming one of the top suppliers of fresh chicken products to Moscow. After the successful 10 year campaign, UIPDP divested itself, which was the plan all along, selling off its Elinar Broiler shares back to the Russian partners.

"Today, the U.S. exports 9.1 million metric tons of poultry to Russian markets, totaling \$6.9 billion in revenue." Jim Sumner, President of USAPEEC and member of the Elinar Broiler Board of Directors said. "That's a pretty good return on our initial investment." The initial investment if you recall, was a \$15 million combined contribution, of which \$5 million came from the U.S. Poultry Industry and \$10 million of sunflower seed oil was donated by the U.S. Government. Most would probably agree with Jim here, that's a pretty darn good R.O.I., and the big picture, of course, is that this project with Elinar Broiler helped reopen the Russian markets.

Now, Habegger, the former Elinar Broiler manager and present day CEO of First Fresh Foods, is back in the States attempting to market the very same Russian-style chicken products he manufactured with Elinar Broiler. They've started by introducing six products, ranging from cutlets to chicken sausage. Habegger added, "We're rolling out with products that are flavorful, high in quality, and made

from whole muscle white meat." Although, the initial plan is to market the First Fresh products where Russian and Eastern European populations are prevalent, his hope is to eventually expand the products' reach beyond these niche communities.

In the 1990s, the U.S. poultry industry went into Russia and helped improve of a struggling chicken company called Elinar Broiler. Today, the story continues, with those very same ideas and principles embedded in Elinar Broiler, making their way back to the U.S. **UB**

Article contributed by Terence Wells
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Production began on December 9. Once the fully-automated, 227,000 square-foot Vincennes plant's first shift reaches full production this year, it will employ 300 people. That number will rise significantly if Farbest expands to a second shift, Farbest officials report.

JFS Milling, Farbest Food's new turkey feed mill in Bruceville, began making pelleted feed in October and will employ 30 people at full production.

BOOSTING JOBS AND ECONOMIC GROWTH

"We look forward to becoming a big part of an era of economic growth in Knox County and Southwestern Indiana," company president Ted Seger said at the ribbon-cutting event. Seger thanked federal, state and county officials and the cities of Vincennes, Bruceville and Bicknell — where a new turkey brooder hub is located — for their "tremendous support and acceptance throughout this process."

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Farbest Foods' headquarters, original processing plant and related facilities are located in the Dubois County area. The company is one of the largest turkey producers in the U.S., shipping about one million pounds of raw fresh and frozen turkey products daily to brand-name food processors in the U.S. and around the world.

LOCAL RESOURCES; SUPPORT ON ALL LEVELS

Farbest oversees the growth of its own turkeys — currently more than 10 million per year — and its first feed mill in Dubois produces 1,800 tons of turkey feed each day using locally-grown corn, soy beans and other agricultural products.

By 2014, once the Farbest Vincennes plant reaches full first-shift production, the

two plants combined will process some 12.7 million live turkeys each year. That number is expected to rise consistently through 2016.

Farbest reports it chose the Vincennes site based on the availability of locally-grown grains; the potential for contracting new turkey-growing farms in the tri-state area; and the support it received from officials of Vincennes, Knox County, and Indiana's Economic Development Corporation and Department of Agriculture.



Adapted from a story that originally appeared on Foodmarket.com on December 4, 2013

Statement of Ownership Management and Circulation

1. Publication Title: Urner Barry's Reporter	10. Owner: Urner Barry Publications, Inc., 182 Queens Boulevard, Bayville, New Jersey 08721. Stockholders owning or holding one percent or more of total amount of stock are: Paul B. Brown, Jr., 1509 Forrest Trail Circle, Toms River, New Jersey 08753; Richard A. Brown, 212 St. Clair, Spring Lake, New Jersey 07762; Michael W. O'Shaughnessy, 925 Teaberry Lane, Brielle, New Jersey, 08730.	
2. Publication Number: 009-500	11. Known Bondholder, Mortgagees, and Other Security Holders Owning or Holding 1 Percent or More of Total Amount of Bonds, Mortgages, or Other Securities: None	
3. Date of Filing: October 31, 2013.	12. Tax Status Has Not Changed During the Preceding 12 Months	
4. Issue Frequency: Quarterly	13. Publication Title: Urner Barry's Reporter	
5. Number of Issues Published Annually: 4	14. Issue Date for Circulation Data Below: 8/27/13	
6. Annual Subscription Price: 0.00		
7. Location of known office of publication: 182 Queens Boulevard, Bayville, Ocean County, New Jersey 08721.		
8. Location of headquarters or general business office of the Publishers: 182 Queens Boulevard, Bayville, Ocean County, New Jersey 08721.		
9. Names and addresses of Publisher Editor and Manager Editor: Publisher, Paul B. Brown, Jr.; Editor, Russell Whitman; Managing Editor: Joseph Muldowney, 182 Queens Boulevard, Bayville, Ocean County, New Jersey 08721.		
15. Extent and nature of circulation.		
	Average No. Copies Each Issue During Preceding 12 Months	No. of Copies of Single Issue Published Nearest to Filing Date.
A. Total No copies printed (net press run)	10,875	11,650
B. Legitimate Paid and/or Requested Distribution (By Mail and Outside the Mail)		
1. Outside County Paid/Requested Mail Subscriptions stated on PS Form 3541.	10,025	10,547
2. In-County Paid/Requested Mail Subscriptions stated on PS Form 3541.	-	-
3. Sales Through Dealers and Carriers, Street Vendors, Counter Sales, and Other Paid or Requested Distribution Outside USPS®	-	-
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C. Total Paid and/or Requested Circulation [Sum of 15b. (1), (2), (3), and (4)]	10,025	10,547
D. Nonrequested Distribution (By Mail and Outside the Mail)		
1. Outside County Nonrequested Copies Stated on PS Form 3541	-	-
2. In-County Nonrequested Copies Stated on PS Form 3541	-	-
3. Nonrequested Copies Distributed Through the USPS by Other Classes of Mail	-	-
4. Nonrequested Copies Distributed Outside the Mail	627	880
E. Total Nonrequested Distribution (Sum of 15d (1), (2), (3) and (4))	627	880
F. Total Distribution (Sum of 15c. and e.)	10,652	11,427
G. Copies not Distributed (See Instructions to Publishers #4, (page #3))	223	223
H. Total (Sum of 15f. and g.)	10,875	11,650
I. Percent Paid and/or Requested Circulation (15c divided by f times 100)	94.11	92.30
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Joseph Muldowney, Managing Editor		

Continued from page 1

Japan, South Korea and China, but there is none available yet in the U.S. The vaccine used in Asia may not be effective against the strain of PEDv found in the U.S.

Animal health officials have linked the strain of PEDv found in the U.S. to one in China, but they have not been able to determine how it got into the U.S. nor why outbreaks occurred in various locations and states within a short amount of time.

Numerous research projects, funded in large part by the National Pork Board using producer-donated pork checkoff dollars, are underway in an effort to better understand this disease and how to control or eradicate it. The Board has designated \$800,000 to this effort.

Producers have been urged to use the best biosecurity practices to reduce the risk of their hogs contracting the disease, but new cases of PEDv are on the rise this fall. Cooler temperatures have arrived, which may be allowing the virus to live longer. There may be other factors as well that contribute to the spread such as applying manure to recently harvested fields. The manure slurry may contain still-living PED virus which could then be carried to new locations on the tires of tractors, sprayers or other equipment and possibly by wildlife such as birds.

Preliminary research indicates that the virus may be able to remain alive and

"Preliminary research indicates that the virus may be able to remain alive and infectious in manure slurry for 6 to 8 weeks."

infectious in manure slurry for 6 to 8 weeks. The virus spreads within a herd mainly through contact with manure from infected animals but can also be spread on infected clothing, shoes and other means within or among buildings and farms.

Pork industry participants and animal health officials had hoped that the implementation of strict biosecurity measures throughout the summer would control or at least limit the number of new cases. The efforts seemed to be helpful as the number of new cases was relatively low throughout the summer, averaging around 29 weekly compared with 45 a week in late May through early June.

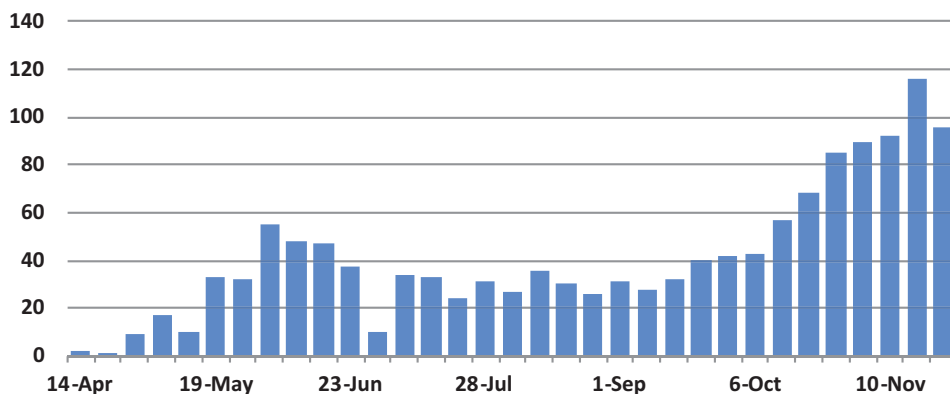
But the data shown on the American Association of Swine Veterinarians' website indicate the number of new cases has been on the rise since mid to late September. In the latest data available, for the week ended Nov. 30, the case count was 96, down from the previous week when the

largest number of new positives was found since the disease was discovered in the U.S. at 116. The latest total for the case count since the disease was first confirmed in the U.S. was 1,373. Six consecutive weeks of new highs occurred before the dip in the latest week, and the last seven accounted for nearly 44% of the total cases reported since mid-April. The growth in recent cases of PEDv raises even greater concerns about shortages of slaughter-ready hogs next spring and early summer.

"It would appear that the worst impact of the disease is ahead of us," said Steve Meyer and Len Steiner, authors of the Daily Livestock Report. "The uncertainty comes from the fact that despite reports from AASV, it is unclear how many hogs have indeed been infected and what is the survival rate. At this point, the market is left guessing, and the guess is that despite \$4 corn, we could still see \$100 hogs this summer, promising excellent margins for those with hogs to sell." **UB**

Article contributed by **Curt Thacker**
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Number of PEDv cases by week reported by AASV



Source: American Association of Swine Veterinarians

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URNER BARRY'S Reporter

Urner Barry • P.O. Box 389, Toms River, NJ 08754-0389
Volume 9, Number 1 • Winter 2014

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.



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