

Technical Challenges in Meat Processing and Meal Solutions

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Introduction

Upon receiving the title to this presentation, I was amazed by its breadth. Since the American Meat Institute (AMI) deals with challenges in the meat industry, I started by searching its website. The AMI challenges are related to animal health/welfare, labeling, environment, work force and safety, food safety and inspection. I then searched *Challenges in Meat Processing*. The results were a host of anti-meat industry and anti-corporate farming websites. Their major issues deal with feed additives, antibiotics, pesticides, hormones, need for organic/natural foods and genetic engineering. As a result of this search, I decided to concentrate on *Challenges in Meal Solutions*.

Challenges in Meal Solutions

Personal History of Meal Solutions

In 1995, Emmpak Foods rolled out *Tonight's Choice*, a line of cooked entrees and side dishes. The entrees were 8-10 oz sliced, cooked and vacuum skin packed on a foam tray. This line of products was one of the first meal solution concepts presented to retailers. The concept was tested with many of the major US retailers. The food was good, the packaging exciting, but the sales were slow. We soon learned that retailers did not always desire the side dishes. The meal solution side dishes were thought to compete with the deli side dish program. Focus group testing, prior to concept rollout, indicated that consumers would purchase upscale and unique items not easily prepared at home. Sales analysis revealed the opposite. The best selling items were ribeye steak, chicken breast and meat loaf. The skin packed items looked excellent in their packaging, but consumers occasionally commented on a plastic appearance.

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Our next meal solution endeavor was based on comfort foods. In 1997, we presented *Heat and Serve* roasts consisting of 8 different 1.25# cooked roasts in a vacuum packed bag placed in a microwavable tray with transparent lid. This concept was relatively successful and returned acceptable margins for approximately 2 years. Versions of this concept are still very successful in several retail club stores. As sales declined at conventional retail markets, additional focus group testing determined: 1) that the unit price was too high (\$8.99/package), 2) pre-sliced was necessary to improve convenience factor, 3) more instructional materials were needed, and 4) a unique twist was necessary to enhance the comfort foods.

Heat and Serve: Dinner for Two was launched in 1999. Each entrée was cooked, sliced and vacuum packaged. Each packaged entrée (10-12 oz) was placed in a upscale fiberboard carton (no tray) along with a 4 oz package of *Chef prepared* sauce, several recipe ideas, reheating instructions and redeemable coupons. This meal solution line returned acceptable margins for approximately 3 years.

Several raw marinated-ready to cook meal solution lines have been launched with varying degrees of success. Certain items within these lines continue to be successful with major US retailers.

US Eating Trends

Four important trend categories are flavor, health (organic/natural), ethnicity and convenience. Flavor is still king. Popular flavors include: Lightly forgien, fruit and nut flavors, smoke/wood roasted/grilled, contradictor flavors (sweet and spicy, sweet and savory), upscale cheeses, regional ethnic, and comfort foods with a twist. Fresh, pure authentic, local are some flavor buzzwords that also bridge into the health trend.

The health and cause-related trend has provided numerous menuing opportunities. Examples are: no/low carbohydrates, light, low-fat, vegetarian, gluten-free, natural, organic, farm-fresh, free range, local and farm raised. The casual, family and fine dining restaurant sectors have capitalized on these menuing opportunities.

Ethnic menuing and flavors are extremely important to further business growth. Hispanic flavors are the most im-

portant since the Hispanic population is the fastest growing group in the US. Historically, Hispanics prepared and consumed a high percentage of meals within the home. Hispanic expenditures on food prepared away from the home increased 39% from 1997 to 2002 (NPD, 2005). It is important to address regional Hispanic foods since flavors and menu items differ. Island cuisine is another ethnic trend growing in popularity with consumers.

The convenience factor is the basis of meal solutions. The concept requires good food, easily purchased and easily prepared/served at home. Drive-through concepts are continuing to develop in the restaurant industry. Some limited service restaurants service 40% or more of their business from the drive-through (Mintel, 2005). Casual and fast-casual restaurants have incorporated drive-through convenience into their units. Retail store need to investigate servicing customers in their cars. Many retailers have positioned their hot food concepts in the front of the store with special checkout lines. This provides added convenience, but falls short of drive-through.

Current Successful Retail Meal Solutions

To better assess the current status of meal solutions, I interviewed Cargill's VP Retail Meal Solutions. Surprisingly, the best retail meal solutions are foodservice solutions. Successful meal solution retailers are operating restaurants in their stores. Therefore, retailers are seeking total meal solution concepts from their suppliers. They want suppliers to provide: training, marketing, preparation, menu planning, consumer information, product development and private label assistance.

The greatest challenge to retail meal solutions is competing with restaurants for market share. Foodservice industry sales grew 7.12% in 2004, yet units grew only 0.42% (Technomic, 2005). Restaurants are selling more per unit, not growing the number of units. Americans' use of restaurants has stabilized at approximately 200 visits/year. Annual meals consumed in a restaurant have actually declined from the late 1980s. Restaurant meals eaten at home have stabilized at 57/year (NPD, 2005). The result is that everyone is fighting for a stable amount of business. Restaurants are aware of this and are aggressively implementing new programs to attract customers. Meals ordered from and consumed in the car is an area of growth. Numerous restaurants, historically not known for car service, have added curbside service to enhance home meal solutions. Take N Bake concepts are becoming popular by allowing consumers to pick up meals that are prepared and just require heat-

ing at home. This concept has also grown to delivery service of meals at home. Restaurants are designing menu items to aid consumers in ordering meals for home consumption (Mintel, 2005). Limited serve concepts are providing value meals that allow mix and match choices to better serve meal solution behavior.

Packaging

Hot foodservice meal solutions have resulted in relatively simple packaging solutions. The portion sizes are larger and most solutions require conventional vacuum or modified atmosphere packaging. Often, retailers are buying meal solution entrees in cook-in/ship-in or frozen vacuum packages. Both of these packaging methods are exempt from USDA alternative 1, 2 or 3. Therefore, the use of antimicrobials or post-pasteurization is not required.

Conventional retail meal solution packaging continues to be complex. Foremost, the packaging must provide sufficient food safety. Easily understood reheating instructions and microwavability are also a must.

Summary

A review of previous meal solution programs can prevent future errors. The most important US food trends are: flavor, health, ethnicity and convenience. The greatest challenge to retail home meal solutions is competing with restaurants for market share. The most successful retail meal solution programs emulate foodservice activities. Therefore, retailers are looking for help in operating a restaurant in store. Retailers are relying on suppliers for help with: training, marketing materials, menu development, private labeling, food safety and supporting literature. This move toward hot meal solutions in retail has actually simplified packaging requirements for the manufacturer. Basic vacuum packaging and larger portion sizes have reduced the need for extravagant packaging. Conventional retail meal solution packaging remains complex. It requires food safety, extensive handling instructions and microwavability.

References

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