

AUSTRALIAN **Meat**News

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VOLUME 16 | NUMBER 1 | MARCH 2018

**The how to
guide for
China exports**

**Andrew chooses
his path**

**Western Meat
Packers takes
on young guns**





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*Lachlan Grabam, from Argyle Food
Group says understanding the business
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Image courtesy: The Weekly Times

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Telephone (03) 9421 2855

Facsimile (03) 9421 5438

Toll Free 1800 621 631

EMAIL

Admin: optimal@majestic.net.au

Editorial: optimalnews@majestic.net.au

Advertising:

optimalnews@majestic.net.au

ADVERTISING 1800 621 631

PRODUCTION TEAM

Publisher/Editor: Athol Economou

Managing Editor: Deborah Andrich

Layout & design: Jocelyn Harvey

Subscriptions: Sheryl Pither

Find-a-Word: Jo Edwards

CONTRIBUTORS

Stephanie Flynn

Deborah Andrich

Susan Webster

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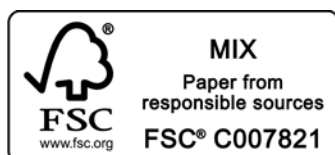
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Bunzl Food Processor Supplies & Flavour Makers join forces

Bunzl are now an official distributor of Flavour Makers in NSW and SA. Working together, the companies will be better able to service customers and respond quickly to evolving consumer trends.

A culinary focus and consumer-led approach means that Flavour Makers is constantly innovating to provide new on-trend products to set their customers apart from the competition. Examples of

new products include Sriracha Spice/Glaze and South Carolina and Louisiana BBQ Rubs straight from the American barbecue belt.

Flavour Makers has been at the forefront of natural and gluten free trends with the backing of a world-class allergen management system. Their range includes organic, health and allergy-friendly products. ■



Tipper Tie from Globus

Globus, after many years of being Australia and New Zealand's leading supplier of clipping equipment, clips, loops and labels – has joined forces with Tipper Tie.

Tipper Tie specialise in clipping solutions for the meat, poultry, seafood and pet food industries and service customers, worldwide and have a leading market presence in the US and Europe.

The Tipper Tie range includes tabletop equipment for smaller or seasonal operators through to semi and fully automatic systems for larger operators. Tipper Tie also make systems that seal, clip, net, bag-and-hang a wide variety of products.

Globus' Phil Marchi will head up the transition to Tipper Tie. Phil brings a wealth of knowledge to the role having previously worked in engineering and most recently as National Sales manager for packaging said Michael Faure Globus Group sales manager.

Globus Group has experienced and knowledgeable technicians and have sufficient equipment, spares and consumables, on-hand, to ensure prompt installation, service and supply throughout Australia and New Zealand. ■



National Sales Manager Michael Faure (L), with Phil Marchi (R) who will lead the roll-out of the Tipper Tie range of equipment and consumables.

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Thomas Food community bands together post-fire

Early in January, a massive fire ripped through the Thomas Foods International export facility for beef and lamb at Murray Bridge, SA, causing extensive damage that will require the whole plant to be re-built.

Employing more than 1000 staff, management has made a commitment to support as many employees as possible. The company's Lobethal facility, an hour's drive away, has taken on a number of employees and doubled production, while others have been offered work at the Tamworth plant. Those who take-on other short-term work during the re-build stage, will be welcomed back.

In a statement after the fire, Darren Thomas, CEO of Thomas Foods International, said, "Our company and people have been truly tested these past weeks but we are a resilient and determined team.

"There are no easy solutions in a difficult situation such as this. To find new positions for the majority of our permanent workforce so soon after the fire is testament to the outstanding efforts of everyone involved. This shows what can be achieved when industry, government and communities work together for a common goal."

The South Australian government has set up a support taskforce for employees of Thomas Foods with a Community Information Centre (CIC) at the Murray Bridge Town Hall. A hotline for enquiries for employees and the broader community has also been established – 1800 302 787.

"I commend Thomas Foods for the way they continue to handle this devastating event," Mehdi Doroudi, CIC Fire Coordination Taskforce Chair said, "They (TFI) are working around the clock to keep staff informed, as well as reassure customers and the wider community of their commitment to move forward and rebuild."

If you can help, please give the hotline a call. ■

Agreement reached on TPP

The Comprehensive and Progressive Trans-Pacific Partnership (CPTPP) agreement has now been signed by the remaining 11 countries after re-negotiating the deal after the United States pulled out of the original TPP deal.

A trade agreement between Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, Peru, New Zealand, Singapore and Vietnam, it includes improved market access arrangements for the red meat and livestock sectors.

Under the agreement Australia has gained progressively reducing tariffs for exports to Japan for frozen and chilled beef, offal and live cattle. Canada's quota will remain (35,000 tonnes) but the tariffs will be phased out on beef and the sheepmeat tariff removed.

Tariffs imposed on imports by Japan on beef from Mexico will be phased out within 10 years and goat and sheepmeat within eight years. Peru, will see Japanese imposed import tariffs removed once the TPP is fully implemented.

The remaining member countries will continue to strengthen bilateral and/or regional agreements to ensure market access improvements.

Patrick Hutchinson, AMIC's CEO said, "The TPP 11 will allow Australia's largest trade exposed manufacturer, the red meat processing sector, to operate in a more competitive environment within these markets.

"It reflects the strong, long term relationships we share with our market partners over many years of trade, and is designed to underline continued provision of quality Australian red meat products.

"This is not about increasing access on volume, rather providing competitive access for red meat. It also provides the opportunity for Australian red meat exporters/processors to more effectively manage medium/long term investment within their businesses, at a time of record input costs (livestock, labour, energy), and manage their paper thin margins with more confidence, in turn providing increased confidence throughout the entire supply chain," Mr Hutchinson said. ■



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Aussie butchers prepare to carve up the competition

The knives will be out at the World Butchers Challenge, but the Australian butchers hope to bring home the bacon.

Ireland will host the prestigious competition in March 2018, with 12 countries fielding teams in the biggest turn-out yet.

The Australian Steelers national representative team brings together butchers from across Australia. Team captain, Adam Stratton, from Sydney's Tender Gourmet Butchery, said the Steelers were ready and their team dynamic was strong.

"We're a great team, with specific roles for each member and focused on our end display," Mr Stratton said. "There's a wealth of experience, skill and enthusiasm and we're coming of a win at the 2017 TransTasman competition that's help boost our morale.

"This year's competition is much bigger than in previous years, but we're really excited to see the end results. We know there will be tough competition, but with the extra training we've done and our focus, I'm confident we're in with a shot."

The competition is a three-hour test of skill, preparation, presentation and overall display, but Mr Stratton said it was just a reflection of the skills needed in-store on a daily basis.

The Australian contingent in Ireland also includes the young butchers and apprentices, who will compete in an individual challenge under the Young Aussie Butchers banner on 20th March. This new curtain-raiser competition was trialled in 2015 and 2016 as a chance for up and coming butchers to show their skills and learn from other butchers.



The Aussie Steelers team ready to battle it out at the World Butchers Competition, to be held in Ireland in March.

The Australian Steelers are:

Adam Stratton (Captain), Tender Gourmet Butchery, NSW

Colin Garrett, Colin's Butchery, NSW

Paul Brady, Tender Gourmet Butchery, NSW

Tom Bouchier, Peter Bouchier Butchers of Distinction, Vic

Nick Dagg, Gourmet Market Meats, Qld

Luke Leyson, Goodwood Quality Meats, SA

Young Aussie Butchers – Apprentices:

Joseph Maberley, Vic's Meat Market, Pyrmont, NSW

Jack Stuart, Neal Eastley's Quality Meats, East Maitland, NSW

Mitchell Byrnes, Hudson Meats, Drummoyne, NSW

Young Aussie Butchers – Young Butchers:

Caleb Sundqvist, Goodwood Quality Meats, SA

Jimmy Nevill, A Cut Above Family Butcher, Vic ■

Oops, we didn't give credit where credit is due

In the November 2017 issue of *Australian Meat News*, we published a contributed story on good practice for insulation in cold stores, but an oversight meant that we didn't give the author due credit for his work.



Insulation on pipework needs to be fit for purpose, particularly when exposed to the elements.

Submitted by Michael Bellstedt, managing director of Minus40, he makes the point that good insulation and correct installation – whether it is foams, rubbers or panels – can make the difference on efficient cooling systems, saving money on energy bills.

The key points of the story are:

- Choose an insulation that is well suited to the range of temperatures and fire risks that it is likely to be subjected to
- Minimise operating ownership costs by choosing an appropriate thickness – too thick and you may be wasting your money
- Protect the insulation against damage – UV, forklifts, exposure to fats and grease
- Choose an insulation that is resistant to moisture or install a well designed vapour barrier to prevent moisture getting in.

Thanks Michael for your great work!

www.minus40.com.au ■

Australia's newest Sausage Kings

Six butchers from around the nation have survived a sizzling showdown to claim the title of 2018 National Sausage King.

After winning their way through regional and state rounds, the group claimed victory in the annual Grand Final, held in Healesville, north east of Melbourne on Saturday 10th February.

The 2018 Kings are:

Traditional Australian: John Hastie, Hastie's Toptaste Meats, Wollongong, NSW

Traditional Aussie Pork: Michael Almond, Collins Court Butcher, Mt Gambier, SA

Poultry: Raff Barbaro, Barbaro Bros Quality Butchers, Perth, WA with a chicken bratwurst

Lamb: Bernie Nolan, Circle T Meats, Brisbane, Qld presenting a Moroccan lamb

Continental: Paul Rae, Aussie Smokehouse, Warana, Qld with the best bratwurst

Gourmet/Open: Kory Edwards, South Nowra Meats, South Nowra, NSW showcasing a Peking Duck sausage

The winning sausages are judged in both raw and cooked form, grading them for flavour and texture, as well as shrinkage, splitting and crinkling.

Organised by AMIC, the competition attracts huge interest from the nation's independent butchers.

"Every year we are amazed at the interest we receive from butchers across Australia from country towns to capital cities," says AMIC executive director, Paul Sandercock. "It's an event that gets bigger and better and shows that butchers still play an important role in the community."

The Best Butcher Burger awards were also held with the winner in the beef category with an Angus beef burger was from Milan Matutinovich, The Corner Butcher, Morley WA. The Thai chicken with shredded coconut burger presented by Shaun Watson, Tender Cuts, Naracoorte, SA took out the Best Gourmet Burger.

Recognising the industry's future

To acknowledge the industry's future butchers and innovation, the 2018 National Apprentice of the Year saw state representatives battle it out in a two hour Mystery Box competition.

The Mystery Box challenge requires contestants to create a range of dishes within a two hour time frame, where the ingredients are unknown prior to the competition. The primals for this year's event were a beef knuckle, leg of lamb and a pork rack and each box included bacon, mince and ham pancetta.



Kiara Marrone and Brennan Robertson are proud of their efforts for the Apprentice of the Year and said the competition was a great way to hone skills and network with the industry.

Other ingredients available from a shared resource included pastry, vegetables, lemons, fresh herbs, cheese, nuts, honey and the mystery item was artichoke hearts and fresh flowers.

Judges assessed the range of value-add products the apprentices create based on preparation and performance, use of ingredients, creativity, product knowledge and adherence to food safety and OH&S.

Taking out the top honour was Jack Stuart, of Neal Eastley's Butchery, East Maitland, NSW who presented a range of beef, lamb and pork dishes. Anthony Palmer-Field of Mt Pleasant Meat Specialists, Mount Pleasant, Qld, took out second place, while Kiara Marrone of Goodwood Meats, SA was awarded third.

Kiara and Brennan Robertson of Torre & Mordini Gourmet Meats, WA both commented that being a part of the competition was a wonderful opportunity to hone their skills as apprentice butchers and network and share ideas with interstate colleagues.

Neither of the two had meat industry backgrounds prior to commencing their apprenticeship, but both expressed a love of food, choosing to be a butcher rather than a chef. Brennan, who has had training as a chef previously, commented that being a butcher, gives real rewards for real food and he can see the appreciation of his work in the shop. ■



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Build your Business Skills

The Meat Development Program is an intensive, live-in course designed to develop business, communications and people management skills for the meat industry. It will run for four days from June 12 - 15, 2018 and will be held at the Sydney Conference & Training Centre, Ingleside, northern Sydney.

This course is specially designed for young people, who have developed their trade skills, to take the next step and acquire business skills to progress their careers or fully

realise the potential of a small or family business.

The program is centered on practical and applied learning with a meat industry focus. Interactive sessions will be facilitated by faculty staff and invited business experts.

The program is described as a "journey" not an "event". Students will make individual and group presentations to enable the sharing of industry knowledge and encourage peer feedback. Real-world



case studies will highlight strategic thinking and effective action.

The course will be presented by Dr Melinda Muth, Director of the Institute of Food and Grocery Management and invited specialist educators together with guest industry executive Mr Mark Heintz, CEO of Otway Pork.

The course fee is \$5,450.00 + GST and includes lectures, books and materials, accommodation and meals. ■

SPECIAL OFFER

The Institute of Food and Grocery Management and *Australian Meat News* are offering \$1,000 off the registration fee for the first four participants from small businesses that contact the Program Manager, Anita Pike and reference this article. This reduces the price to \$4,450 + GST, which includes accommodation and all meals.

Anita can be reached at 03 8640 0947 or apike@streamwise.com.au.

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All-natural grassfed beef with a minimum marble score of four (AUS-MEAT), a feat near impossible to replicate, makes Little Joe the most exclusive beef offering by JBS Australia's southern business.

Value for money calculations are constantly evolving. Gone are the days when it was only dollars per unit of protein. While unit cost, eating quality and convenience are still important, production values that include; the environment, nutrition, freedom from potentially harmful inputs and animal welfare are increasingly influencing consumers' purchase decisions.

Consumers across all market segments are looking for eating quality, and a provenance story that is consistent with their values and aspirations.

In 2010, JBS Australia launched their class leading JBS Farm Assurance (JBSEA) program, an ambitious project where the company partners with cattle and sheep producers to ensure livestock are bred, humanely raised, only naturally pasture fed, free to roam, and managed in accordance with best practice and in-line with consumers' expectations.

JBSEA underpins the majority of brands produced by JBS' southern operation, which are all linked by the same raising claims. Cattle destined for these brands must be 100% grass fed, have never been treated with antibiotics,

continued on page 12

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have never been administered hormone growth promotants (HGP), and never have been exposed to genetically modified feedstuffs (GMOs).

In addition, JBSFA production standards require livestock operators to ensure all stock are fully traceable from property of birth to place of slaughter. The standard also covers; nutrition, animal husbandry, animal welfare, the use and management of farm chemicals, maintenance of farm equipment, and the training of staff who handle livestock.

The JBSFA program, meeting international ISO17065 requirements, requires all producer partners to be third party audited and comply with the regulations and standards in order to maintain the integrity of the program.

JBSFA has grown over the past seven years to be the largest and leading certified livestock supply program in Australia. Thousands of certified and audited beef and lamb producers spread across; South Australia, Victoria, Tasmania and southern New South Wales supply a carefully selected range of cattle and lambs into JBS' southern operations in Melbourne, Scone and Longford (Tas).

The livestock team at JBS works closely with livestock producers that supply into JBSFA. This partnership has improved farm productivity and streamlined production, and has resulted in a sizable increase in carcase quality and MSA optimisation scores since the program's inception.

From this foundation, JBS has developed a range of grassfed brands, each with their own unique MSA and provenance. Now 4,000 head of cattle per week are processed under the program and supplied into these brands.

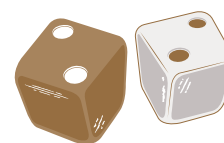
Brands

Great Southern is the original Farm Assurance backed brand. See below for the full range of JBSFA backed beef and lamb brands:

BRANDS	MARBLE SCORE	AUSMEAT CIPHER	BREED
GREAT SOUTHERN BEEF	0+	YP	BRITISH AND EUROPEAN BREEDS ONLY, NO BOS INDICUS, NO DAIRY.
LITTLE JOE	4+	YP	
GREAT SOUTHERN PINNACLE	2+	YP	
KING ISLAND BEEF	1+	YP	
HEREFORD BOSS	0+	YP	HEREFORD BREED ONLY.
GREAT SOUTHERN LAMB	N/A	*L*	MEAT BREEDS ONLY, NO MERINO

Little Joe

The newest addition to JBS' southern brands portfolio is Little Joe, designed for beef connoisseurs, it is very unique and exclusive in supply.



Little Joe complies with all of the raising requirements set out by JBSFA but in addition, has a minimum Marble Score of 4. Little Joe meets very strict brand specifications and achieves some of the highest MSA optimisation scores in the country.

little joe

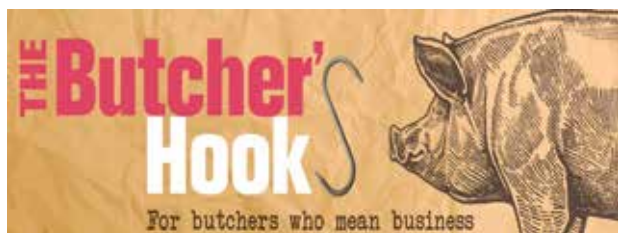
Little Joe is the first commercially available grass fed beef that manages to achieve the marbling and eating quality, whilst also meeting the JBSFA raising standards.

These brands are available exclusively through D.R. Johnston, the domestic wholesale division of JBS Australia. ■

Butcher's Hook – Tips for Success

The Butcher's Hook program, launched by Australian Pork Limited (APL) in February is an update and refresh of *The Butcher's Battleplan* developed in 2012.

Recognising that the retail landscape has undergone changes in the past six years, many of the same challenges remain; APL has overhauled the program to deliver bite-sized information and video content. Topics will be wide-ranging, from what consumers want to business costs, staffing and competition.



The Butcher's Hook, launched by Australian Pork Ltd is a freshen up of The Butcher's Battleplan to contain bite-size information and video content that reflects the current retail landscape.

"The reality is that butchers are under pressure from a lot of different issues and we'll be offering tips to tackle and ease these, with the end goal of making your business more successful," said APL independent channel manager, Jennifer Fletcher.

"The Butcher's Hook will cover everything from training to in-store display and point of sale materials, to the latest pork advertising campaigns and information about the PorkMark program, as well as competitions, recipe templates and tips for media engagement.

"Butchers who subscribe also gain access to a new pork value-add recipe every two weeks," Ms Fletcher said.

The Butcher's Hook has been officially launched to kick off in 2018, with butchers encouraged to sign up at www.porkbutchers.com.au or by emailing porkbutchers@australianpork.com.au ■

Winners of the November 2017 Find a Word Competition

Congratulations to the winners and thank you to our sponsor BUNZL. Bunzl will contact all winners and make arrangements to deliver your prize.



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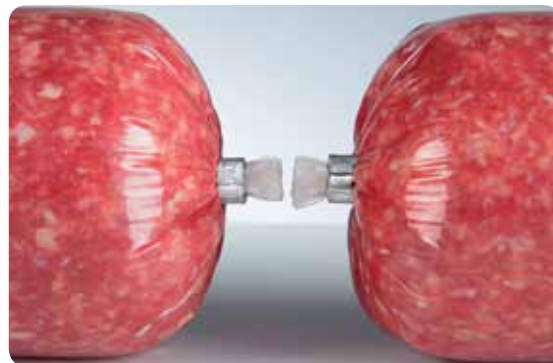
Ms Laura Brasacchio, Tibaldi Australasia, Clayton Vic

Mr Christopher King, Byron Bay Butchery, Mudgee NSW

Mr Emmanuel Mentis, Manuel's Superior Meats, Hurlstone Park NSW

Mr Ken Simpson, My Butcher Duke Street, Gympie Qld

Mr Brett McDonald, Homebush Export Meat, Condell Park NSW



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Andrew Vourvahakis, owner of Andrew's Choice has built a word of mouth reputation for premium quality hams and smallgoods that give the consumer an experience in food.

Andrew's Choice, a business built on quality

Uncompromising quality is the key factor that has driven the growth in sales at Andrew's Choice, a smallgoods business, based in Laverton, in the western suburbs of Melbourne.

The reputation of Andrew's Choice Christmas hams has reached the point where the company produces hams in the thousands and all are pre-sold. Such is the popularity of the hams, that Andrew Vourvahakis, owner of Andrew's Choice, has been featured on television and in mainstream print media. And, there is no marketing team, or public relations agency, or social media or sales team. His marketing is all based on word of mouth – allowing the product to “speak for itself”.

Andrew buys locally grown Australian female pigs from Riverside in Echuca. He works with the growers eight months in advance to prepare for the November preparation.

To prepare the hams, Andrew's team use a slow cook process in the smokehouse for the legs and easy carve portions in batches based on weight to ensure that the fat layer has time to render and infuse into the meat to give a consistent flavour across all the products.

“Eating an Andrew's Choice product is an experience and is the reason why people buy our product,” Andrew said. “We have built a reputation and brand and it is up to us to honour that relationship with our customers every time they buy our product.”

“The sale of Christmas hams makes up 80% of our business, so having the right systems in place – quality control, refrigeration, packaging – must be working correctly, otherwise we are not doing the right thing by our customers.

“If a butcher rings us to sell our hams through his shop and asks for the price, I tell them they are already on the wrong foot.

“Our hams are an experience, not a price point. The family wants to see the beautiful ham on the table at Christmas,

continued on page 16

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smell it, taste it and savour the flavour. If it is a good experience they will remember the brand, not how much they paid for it. If they want a price based ham, send them to the supermarket, but that is not what we are about,” Andrew said.

Learning on the job

Much of what Andrew knows has been learned through trial and error. In the early days of making hams and sausages, he believed (and admits he was wrong), that it was bad to have fat, that a lean product was better. He now knows that it is the fat that gives the flavour.

Andrew’s first attempts at making hams started with smaller pigs at 50kg which give a wonderful presentation of a 5kg leg, but had no fat coverage and consequently were flavourless and dry. In addition the young meat of the smaller animal did

Controlling Electricity Costs

Andrew’s biggest short term challenge is the power bill.

The cost of electricity has increased significantly, putting businesses, like Andrew’s Choice under stress. In Andrew’s case, the annual bill has trebled from \$80k to \$250k per year. This year, Andrew will install a solar system to help reduce the cost. Raising his prices is not an option.

Andrew is fearful that in the near future, the industry will see many smaller operators either taken over by corporates or simply close-up and walk away. Andrew takes pride that his business is a leader in the industry, but he admits it is hard and there is only so much he can do as one person.

“We need to work together as a team, a united voice, to get a better deal for small operators and butcher shops. If 75% of small business employs 85% of the Australian workforce and collectively butchers make up 10% of that, then we can have a voice with the power companies,” Andrew said.

“It is hard though, to divide yourself between running your business and lobbying the local MP and negotiating with the power company.

“The industry needs to recognise that we need a spokesperson to act on our behalf to get a better deal. Without a better deal, many will lose their jobs. We have already lost the automotive industry – will we lose food manufacturing to overseas companies as well?”



Thorough quality control and attention to detail have ensured that Andrew's Choice products are highly sought after.

not have the ‘body’ that comes with age – in the same way a good red wine develops with age. The same is true of his first batches of kransky – Andrew discovered it was the fat that made the difference.

Quality pepper and spices are a vital element of Andrew’s Choice products that now include bacon, kaiserfleisch, frankfurts, kabana and smoked chicken and turkey. Quality ingredients give a quality product. Using inferior white pepper for instance results in a higher cost as it is necessary to use more to achieve the same taste as a good quality one.

Andrew started down the path of butchering at the age of 10, washing and cleaning, standing on a milk crate in his father’s butcher shop in Yarraville, in Melbourne’s inner west. By the time he was 18 in the early 1990s, he had bought out his father’s partner to be part owner of the business.

In those early years, business was slowing and many of the eight local butcher shops folded. In an effort to keep ahead, Andrew and his father investigated making smallgoods, mostly hams, sausages and bacon. Eleven years ago, the business had outgrown the shop’s capacity to make smallgoods, so Andrew made the

decision to build a purpose built factory, while his brother ran the shop as a separate business entity.

Andrew learned the basics while studying smallgoods at William Angliss Institute under the guidance of Doug Ramsay. It wasn't until he met Hans Bauer, a master butcher from Germany, that he really understood the why of smallgoods.

"Looking back on those early days, I laugh at how I went about things," Andrew said. "Sometimes I had too much smoke and all you could taste was the smoke. The cheese kransky didn't have enough cheese and Hans told me after trying my attempt at weiswurst that, 'tomorrow I show you how to make it properly'.

"Hans was so skilled that he could feel the weight of the meat and know exactly how much salt, sugar and flavour was needed without measuring – I wouldn't dare, even now. From Hans, I learned why you use salt and sugar in a frankfurt, not just remember the recipe.

"The first smokehouse I had in my father's shop was nothing more than a tin shed with a copper bowl cutter and mincer – no coolroom, no quality control – that was how it was done in those days."

Regulations

Now, regulations dictate much of how Andrew runs his business. Temperature loggers are deployed in all the fridges and freezers; swabs are taken regularly to ensure product integrity and full cross referencing is kept between batches for manufacturing, cooking and storing to ensure complete traceability.

Lamenting about the regulations and those that enforce them is not what Andrew focuses on. He believes that if his systems are in place to meet the regulations, then the auditors have no reason to seize product and Andrew does not begrudge them for doing their job.

Andrew still remembers, the terrible incident in South Australia in the 1990s when bacteria in smallgoods caused severe illness in a number of consumers. Andrew knows one mistake can destroy his business – his life's work. His food safety systems ensure he is the first to know if something might be wrong – well before a product gets to a customer.

Teamwork, ultimately is the key to success. Andrew's Choice has built a successful reputation based on a great team who are focused on producing the best possible product and Andrew believes that it is teamwork that makes great products and keeps customers satisfied and safe. ■



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China export success needs due diligence

The market for Australian red meat in China has huge potential but to realise its full potential exporters need to recognise how China does business and respect cultural and language differences.

By Deborah Andrich

China is seen by many as having significant potential as an export market for Australian red meat, particularly as the wealth of households increases giving greater scope to buy or dine, on red meat. Australia's reputation for clean, green, safe meat is certainly an attractive proposition to Chinese consumers.

To succeed, exporters need to undertake a lot of research to understand the Chinese consumer; the likes and needs of the potential customer; the supply chain to reach these customers; the logistics to handle and deliver product and the financial and regulatory requirements that need careful negotiation and management.

The principle proteins consumed in China have been for centuries pork and poultry, but as the country explores other options beef, lamb and goat are increasingly in demand.

Meat and Livestock Australia (MLA) have taken a snapshot of the consumer market and found that pork and poultry currently hold around 68% of the market and beef and sheepmeat at around 12%.

It might not sound like much, but when you consider in a country of 1.4bn people, that 12% becomes a sizeable market.

There is a catch, not every one of those 1.4bn people has the capacity to buy premium imported beef and lamb. MLA use a household income of US\$35,000 a year as a base line for those that can afford imported meats. With currently

8.9 million households in that category and rising to 19.7 million by 2021, it still represents a large market.

For the rendering market in tallow and animal feeds, the numbers are equally as attractive, with pet food likely to increase with household wealth and animal feed. Currently, the industry is valued at \$US2.4bn for the Asia Pacific region with an annual growth at around 4%. Aquaculture is a rapidly increasing component of the market for livestock feed rising from 7% in 1980 to 40% in 2016.

In the past, Australian exports to China had been subject to tariffs, but under the China-Australia Fair Trade Agreement (Ch-AFTA), those tariffs are slowly being removed making Australian product more competitive.

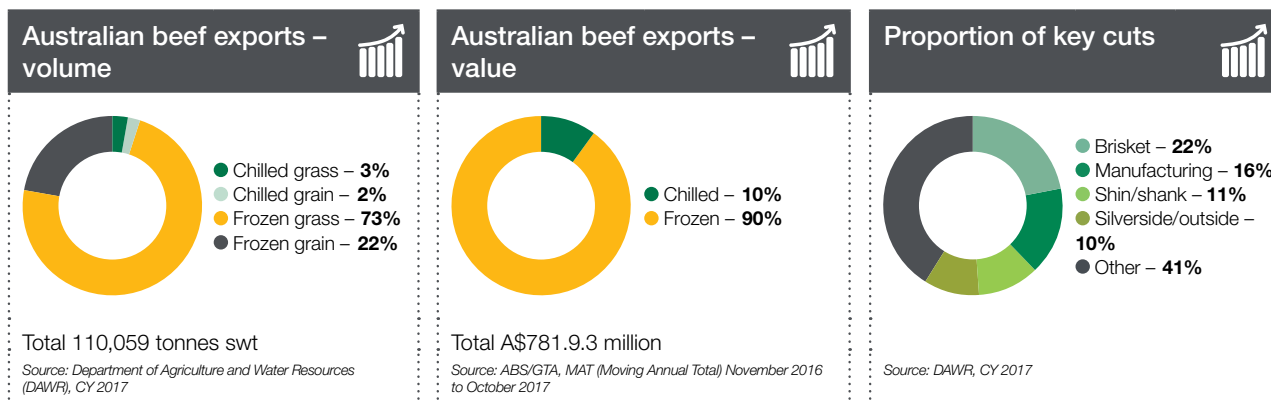
Beef – chilled and frozen currently at 7.2% to be phased out by 2024

Lamb – chilled ranges from 8.3 - 12.8% to be phased out by 2023

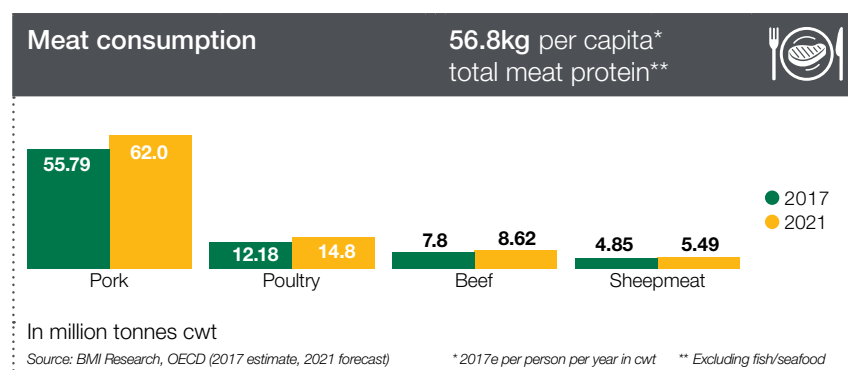
Tallow – currently at 2% to be phased out by 2019

In a report published in 2017 by Rabobank, senior animal protein analyst Angus Gidley-Baird said that 'rather than compete with mass market protein suppliers, Australia should aim to capitalise on its credentials – including the ability to supply chilled product ... creating a higher value proposition to the consumer'.

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and be well-capitalised in case things go wrong, because they usually do.”

Elders had been trading with China for 11 years before turning a profit in 2015. The early years saw two costly mistakes – importing a range of premium products instead of focusing on one product and doing it well and the other, establishing

an e-commerce site that ultimately failed instead of using an established Chinese platform.

The turnaround for Elders was to focus on its core business – beef – distributing exclusive Australian brands of Wagyu to Shanghai restaurants, 50 of which are steakhouses.

Getting the systems in place

Austrade gives guidelines to get an export business off the ground, but suggests that there are several key points to indicate that you are in a position to do so:

You have the time and skill to manage and commit to exports. Developing a new export market can be more demanding than a domestic one. It is recommended that undertaking a course in exporting would be beneficial

Strength in the domestic market. Doing well at home gives you a strong basis to explore export markets – with cash flow and working capital to back it up

Resources – strong financial resources to cover product modifications, travel, marketing and help on the ground in China.

Development of an export business plan. Many businesses have a plan for a domestic market; it's worth considering doing one for an export market.

Knowledge of how to export, including how foreign markets operate, financial arrangements, export documentation and regulations.

Visit <https://www.austrade.gov.au/Australian/Export/Guide-to-exporting/Getting-ready-for-export> for more information.

Once you have determined that you have market potential in China you first need to be a registered exporter here in Australia with the Department of Agriculture and Water Resources (DAWR), from there, apply to be an accredited exporter to China. Processors, live exporters and renderers all need to have this accreditation in place before they can even start.

Do the research and work with an expert

MLA focus market development into China on what is termed the Tier 1 cities; Shanghai, Shenzhen, Guangzhou and Beijing are examples, as well as the east coast. These cities and regions have better systems in place for cold chain logistics, supply chain capabilities and locals on the ground who know how the system works.

“China is an incredibly large country with a large population,” says Michael Finucan, general manager, International Markets, MLA. “By looking beyond the ‘bigness’ of China and focusing on those households that are likely to be the primary market, then exporters can make sense of the potential.”

Dennis King, executive officer of Australian Renderers Association and a former meat trader, agrees. “If you look to targeting a specific region or city, it helps to define what product the consumer is looking for.

“Shanghai, for example has 24 million people – nearly that of Australia’s population, but not everyone in the city will want your product. Choose a couple of regions – north and south – with seasonal differences so you can have year round market demand and access.”

Both Michael and Dennis commented that in many ways the Chinese cold chain and logistics systems are still naïve, and may need to be trained, to ensure that frozen and chilled products are handled correctly and not left to swelter in the heat on the dock.

Finding the right trading partner or consultant based in China will go a long way to ensure that the paperwork is completed correctly;

- there is open communication with the consumer;
- translation of ideas and contracts
- social and business etiquette is observed.

In an interview on ABC’s *Landline* program in early 2017 with Elders China CEO, Craig Aldous said that Australian exporters should expect to be in it for the long haul and not view China as easy pickings.

“Here you need to give yourselves a longer time-frame to achieve your goals, and you need to have deep pockets

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Auditors from China's AQSIQ (General Administration of Quality Supervision, Inspection and Quarantine) will assess your business as a suitable importer into China.

Once approved, it is up to you to ensure that you have:

HS codes – Harmonised System codes are the classification of your product to ensure the correct tariffs, import duties and the like are correctly applied. For example the HS code for fresh sheepmeat carcass is 020410, while frozen bone-in cuts of sheepmeat is 020442

Labeling – including product name, country of origin, AQSIQ number, manufactured date, batch number, shelf life, storage guide, destination, nett weight, your company details and packaging specifications

Export documentation – usually a Chinese agent will collate the necessary documents on your behalf to lodge with Chinese Customs agents. Typical documents will include an invoice, packing list, certificate of origin, bill of lading, trade contract, food safety certificate.

Agreed terms of payment or establish an account through online trading platforms such as Alibaba, JD (Jingdong), Tmall. ■

The cost of getting it wrong

Getting it wrong can be a costly mistake as six beef processing plants discovered in 2017.

A failure to have consistent labels on the inside and outside of the cartons of chilled and frozen beef and sheepmeat led to a suspension of imports into China. Representing around 30% of Australia's exports to China, the ban which was imposed for around three months while the issue was resolved, was a significant financial blow to the five companies involved.

The Australian Meat Industry Council (AMIC) worked with DAWR to ensure that the exporters were able to be up and running as quickly as possible.

"AMIC's role in meat exports is to ensure that Australia has market access free of issues with respect to economic and market trade barriers," says Patrick Hutchinson, CEO of AMIC. "Issues such as the packaging and incorrect labeling of cartons are an example.

"As an industry body, it is our responsibility to work with the processors to ensure that the importing country's requirements are met, just as an importer into Australia must meet ours. We therefore, are involved in ironing out the technical issues that can be an impediment to market access." ■

Who does what?

There are effectively three levels of government and industry that collaborate to maximise Australia's export capabilities:

Department of Foreign Affairs and Trade: development of policy with international governments to develop trade agreements

Department of Agriculture and Water Resources: operates at a federal government level to assist Australian agribusiness to be productive and internationally competitive

AMIC: operates on behalf of the red meat industry to advise DAWR and DFAT and to resolve technical issues to facilitate market access, which can include packaging resolution through to working with exporters to meet audit requirements for AQSIQ

Australian Renderers Association: operates on behalf of the rendering industry to advise DAWR and DFAT and to resolve technical issues to facilitate market access, conduct training workshops for processors and exporters and have engaged a consultant in China to assist with resolving issues should they arise.

MLA: undertakes research and development and marketing activities to assess and promote Australian products into overseas markets.

Useful links

Department of Agriculture and Water Resources:
<http://www.agriculture.gov.au/export/>

AusTrade: <https://www.austrade.gov.au/Australian/Export/Export-markets/Countries/China/Industries/agribusiness>

MLA market snapshots: <https://www.mla.com.au/prices-markets/overseas-markets/market-data-and-insights/>

AMIC: <http://amic.org.au/>

ARA: <http://www.ausrenderers.com.au/>

Need some financial help?

AusTrade offer financial help for exporters – Export Market Development Grants – offering reimbursements of up to 50% for eligible export promotion expenses above \$5,000. It is designed to assist small to medium businesses with international marketing to ensure that they have the best chance of long term success. Applicants can receive up to eight grants.

<https://www.austrade.gov.au/Australian/Export/Export-Grants>

MLA also offers financial assistance through the Collaborative Marketing Program, with the aim of assisting brand owners in beef, lamb and veal to strengthen customer loyalty. If eligible, grassfed beef assured brands may receive up to 75%, while grainfed beef, veal, lamb and goat may attract 50%.

<https://www.mla.com.au/marketing-beef-and-lamb/international-markets/collaborative-marketing-program/> ■

Successfully exported to China

Argyle Foods Group has been a domestic and Asian success story selling beef and lamb from the family's Angus stud in Harden, NSW. The company is owned by the Graham family in partnership with the Manildra Group and Hong Kong listed Dah Chong Hong Holdings Ltd (DCH) and were the Weekly Times Coles Australian Farmer of the Year winners for 2013.

The company is vertically integrated with processing undertaken at Argyle Processing in Nowra, supplying more than 2,000 Australian and Asian retail outlets.

Argyle have been exporting, principally to Shanghai, grain-fed Angus beef at 100, 120 and 200 day programs and are looking to expand into grass fed products. The Graham family recognised that there was a growing demand for Australian product and had a long held vision of establishing a global market based on quality, provenance and end to end supply chain integrity.

In the beginning a group of high calibre managers were engaged in each portfolio – business, quality assurance, market access and documentation and a sales team.

In 2017, in conjunction with partners Manildra Enterprises and DCH, the Graham family announced that there were 'plans to leverage on its latest technology, best practices and highest industry standard of the processing plant in Australia to replicate it in a proposed China processing plant'. Critical

to this success is the close partnership with DCH in China via DCH Gourmet with an extensive sales team in Shanghai, Shenzhen, Guangzhou and Beijing. DCH also manage import, clearance and local distribution to their extensive client base of 5 star hotels, premium restaurants, e-commerce platforms and leading supermarket chains.

Lachlan Graham from Argyle Food Group said, "We will replicate our model in Australia and Asia: similar plants, same equipment, managed by the same management team, with the people on the ground up there providing the same products and brands as from the sister plant like we now operate in Nowra, giving us the ability to value-add and distribute retail ready products."

The increased focus on China exports with the processing plant has seen substantial growth this financial year.

Lachlan says that each market culture and process is different and needs careful management. He has found that export sales must be very clearly documented and contracted in fine detail and that before any order is received the sales contract process must be confirmed including payment terms, product mix, labelling requirements, specifications, shipping terms and production dates and needs to be counter signed. Ideally it is best

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to have pre-payment in full before releasing goods unless there is a credit check and trading history with the customers or a Letter of Credit in place to guarantee payment.

Despite dotting the 'T's' and crossing the 't's', hurdles still occur. Argyle have still had payment issues and lost stock at times and found that launching legal action in an overseas country is complicated.

"Documentation is hugely critical and an area that unfortunately creates issues from time to time as there are so many documents required for every shipment (by air or sea)," Lachlan said.

"Any errors or delays can hold up shipments being released which can lead to demurrage costs, shelf life loss and/or rejection of goods. My advice is to plan very carefully and understand your customer extremely well prior to producing anything.

"All customers are different and China's market and customers are becoming increasingly educated and specific with the expectation of quality of the product and the packaging integrity. If anything is supplied not to their expectation then be prepared to receive a damages claim and no repeat orders!

"China used to be about volume and price, these day the focus is quality, specifications and always on price," says Lachlan.

Adding another dimension

Arcadian Meat Company is a well respected supplier of certified organic meat products into the domestic market under the Cleaver's Organic Meats brand, and since 2005 has been the major exporter of product into North America, Asia and the Middle East.

The company recognised early on that North America in particular were early adopters of organic products – more so than Australia and with a much bigger market, it was an attractive proposition. Arcadian is now the largest exporter of certified organic meat from Australia and well represented internationally.

To reach the Chinese market, the company established a close relationship with businesses that trade with China and in 2014, were the first Australian company to send a shipment of organic beef.



Arcadian Organic Meats are one of the few who trade with China for certified organic meat. The certification process adds another level of complexity for business dealings but has been worth the effort for the company.

The challenge for Arcadian is the organic certification. Australia's certification is no guarantee that it will be recognised in China.

"Obtaining certification to export organic product to mainland China is especially complicated and difficult," says Arcadian marketing manager, Paul da Silva. "It involves a lot of compliance work and onsite audits in Australia by Chinese government representatives. There are also special requirements that have to be met for each shipment. To our knowledge Arcadian is the only Australian business with this approval."

Paul adds that Australian companies cannot assume that what we have to offer is so desirable that you can pick and choose your customer. With such a large market, the Chinese are a sophisticated culture with a lot of business acumen and consequently won't sign a contract if it doesn't give them what they want.

"Finally, I'd say that language is very important and you should use a professional translator whenever possible. Often there is no direct equivalent for a word or idea so you need to be sure that your intention is understood and that it has been correctly translated. The fact that someone is fluent in a language doesn't necessarily qualify them to write your promotional copy or business documents." ■

Co-ops at cutting-edge of meat supply chain

Co-operatives are being revived across Australian agriculture, backed by a \$13.8m Australian Government project that is attracting attention among meat producers/processors.

The Farming Together project has been helping nearly 120 co-ops form since mid-2017, several of them red meat and lamb groups.

The Farming Together project is based in Lismore, NSW, close to the home base of the Northern Co-operative Meat Company (NCMC), which has operated since 1933. That co-op has five core business: beef/veal lines as well as a tannery are based at Casino, a pork line near Byron Bay, a marketing/processing division and farmland for waste water reuse and livestock grazing.

Last year NCMC received a \$175,000 grant from Farming Together to set up a new division to help small family farms upgrade infrastructure. Announcing the grant, Federal Member for Page Kevin Hogan said: "Under the co-operative model, not only does the farmer have a shared interest in the success of the co-operative, the co-operative has an interest in the success of the farmer as a supplier and owner."

Another co-op in the red meat space is Adelaide-based Master Butchers Co-op (MBL) which has operated since 1905, something CEO Warren McLean attributes to: "Remaining relevant to the needs of butchers by being a 'one-stop-shop' for most of what they need. Also keeping prices down by aggressive purchasing, buying group participation and constantly renewing our range with new or improved products.

"Our diversification into pet food ingredients across our protein recycling businesses has added a whole new



Farming Together program director Lorraine Gordon says a co-op structure can be beneficial to all its members.

level of growth to the business, benefiting our butcher members."

Co-op members of MBL include retail/wholesale butchers, supermarkets, smallgoods manufacturers, abattoir and boning room operators, seafood and poultry manufacturers and retailers based in SA, NT and western Victoria. Its divisions comprise Food Service – providing packaging, food ingredients and equipment supplies, MBL Machinery – equipment and MBL Proteins which recycles food industry waste. It collects and processes by-products such as fat, bones and mixed abattoir material from the co-op's members.

"Product is exported to North America, South America, EU, Asia and domestically," Mr McLean said. "We load the container and our manufacturer customer unloads it at the processing plant."

As the meat industry evolves, MBL continues to look at new innovations and another growth area is selling to consumers on-line.



Farming Together have put together a self-taught and paced video explaining how co-ops work.

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"We sell a lot of products on-line, including to chefs, home cooks and country people," he said. "This area is growing."

Demand across the supply chain has led Farming Together to compile a range of free 'how-to' guides helping groups decide if a co-op structure suits – and then supplying the tools for official registration.

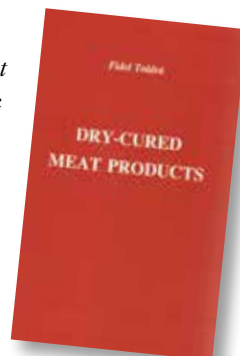
The most recent offering is a free online course – an Australian-first animated guide to help groups understand collaborative business structures.

The course compares co-ops with companies and incorporated associations. It includes information on governance, financing and member engagement. It comprises six, 10-minute video lessons with quizzes. The site www.farmingtogether.com.au > Learn > Online offers self-paced video lessons, you can begin and stop them at any time and each lesson provides access to support resources.

Farming Together program director Lorraine Gordon said: "If you're thinking about forming a co-op, becoming a co-op director, or if you're just curious about co-ops ... this course provides a broad and deep understanding of what co-ops require and what they deliver." ■

Book Competition Winner

The copy of *Dry-Cured Meat Products* by Professor Fidle Toldra was won by Royston Simpkin. Royston correctly answered the question: According to the FAO, on a global basis, how much of the food produced is wasted – 1/3rd.



Royston lives in Dundathu, Queensland and works for Axial Training, an RTO based in Queensland and trains and mentors apprentice butchers.

He is also studying dry curing through a distance learning course at Massey University in New Zealand. On weekends and in his spare time he does farm butchery for locals.

Congratulations Royston and we hope this book proves useful. ■

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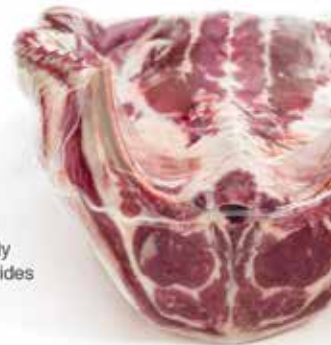
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ML40-MX is a 110 micron shrink bag for the most demanding high abuse applications such as large bone-in meats (e.g. beef ribs, lamb saddles & square cut shoulders).

Shopping for food and groceries – the new ways



Professor David Hughes

In the November edition of *Australian Meat News* we reported on the success of the ready-to-heat and ready-to-eat meals program run but the Vaux Family at their once traditional butcher shop in Rosedale, in rural Victoria.

The following is a summary of a blog posted by Food Industry and Marketing Identity, Professor David Hughes, that describes the parallel expansion of convenience driven ready meals and grocery shopping options being developed by major food retailers and associated internet based service providers in the UK and US.

The blog was posted on 7 June 2017 by Prof David Hughes and Miguel Flavian.

www.supermarketsinyourpocket.com

Twenty years ago, the share price of fledgling Amazon was \$1.49. Clearly, some investors believed in the Bezos vision for the company, but many pundits thought it a folly. The current share price is a modest \$1,011 (June 6, 2017).

To this day, the prevailing wisdom is that there's no money to be made in online grocery delivery. In the early days (and particularly in the USA), the view was that shoppers wouldn't pay a \$5 delivery charge for groceries.

How consumers value their time was seriously underestimated. Now, in London Amazon Prime customers who pay a \$100 annual fee can have Amazon Fresh food at their doorstep for a top-up fee of \$10 per month on as many deliveries over \$60 as they want.

But the hot news on delivering food to home or office is about McDonald's. In the USA, Australia and shortly across Europe, including the UK, McDonalds is rolling out a partnership with Uber Eats. In the US, 75% of the population is within three miles of a McDonald's restaurant which brings ordering-to-home-delivery time down to less than 30 minutes.

It's millennials who are most enthusiastic and, at a push, they'll hang on for half an hour without squealing. The most popular delivery time window is later in the evening – handy as it happens to coincide with a slow period in the restaurants.

Home delivered Big Macs will best suit a group of mates as there is a \$5 delivery charge. This is big food news because McDonald's is so big – 14,000 outlets in the US and 1,250 in the UK – with close to a 50% market share of the large burger chain market.

McDonald's already has a US\$1+ billion home delivery business in Asia and the Middle East. What do the analysts think? Well, McDonald's stock price has increased by 39% (June 2017) since November 2016. The All-Day-Breakfast in the US was a contributing factor.

Online grocery shopping

In the UK, 7% of groceries are already being delivered via online channels. Only Asia (Japan, South Korea and accelerating massively China) has a greater share.

Tesco has more experience in online than any other grocer – its 20-year online anniversary is coming up soon. Early in to click & collect, speeding up delivery, adding other services, Tesco has been consistently innovative, driven on by

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competition from Amazon, other supermarket chains, and the exclusively online supermarket Ocado.

The principal focus has been on capturing the “Big Shop” – the main shop to restock the fridge and larder.

Success in this area has been a double-edged sword. It has reduced sales through their main stores and has led Tesco and others to downsize the floor space allocated to groceries and limit their ranges.

Shopping habits are changing – the main grocery procurement outing is getting smaller and less frequent. Shoppers are more likely to pop into a store to shop for tonight, grab a lunch meal deal, and do the “Big Shop” online.

It is estimated that of the £28 billion of increased grocery sales to be made in the UK in 2022 relative to 2017, 80% of the sales gains will be in convenience stores, the hard discounters and online.

The supermarket chains are particularly focusing on the convenience-driven purchase: Tesco has Amazon Fresh in its sights with a one hour delivery promise using courier Quiqup, Sainsbury is trialing one hour delivery with a “boy on a bike” reminding one of the circularity of trends. Morrisons has launched its online grocery presence with Amazon and Amazon Prime – customers can have their Morrisons groceries within the hour. Marks & Spencer and Majestic Wine both use Deliveroo for “want it/need it now” alcohol purchases.

Many takeaway restaurants have been in the meal delivery business for years.

Only recently have web-based companies such as Deliveroo and Uber Eats arrived to link hungry consumers with trusted restaurants. They are competing with the more established Just Eat that already does takeaway online orders for 20,000 plus restaurants.

These companies have exploded with success, none more than Deliveroo. Deliveroo now builds “warehouse kitchens” that replicate a client’s restaurant kitchen, where the client has run out of space in their restaurant kitchen to service their Deliveroo generated on-line orders.

Convenience Meals

Another variant of convenience meals is fresh ingredient recipe boxes that are directed at those who love food, love to cook but don’t have time to prepare – Hello Fresh and Gousto lead the pack.

Supermarkets are responding. Waitrose, has trialed but withdrawn a “Dinner for Tonight” recipe box sold from stores. They are now trialing a home delivery option “Cook Well from Waitrose”. Tesco has had more success with its store-sold “Recipe Box” and is expanding the

meal ingredient range to include more Asian fresh items and sauces.

Tesco is emulating McDonald’s and forging a partnership with Uber Eats to handle the last couple of miles of delivery for its mainstream online orders.

Like McDonald’s, most households in London are no more than five minutes away from a Tesco store of some sort. Tesco has done an excellent job with its online offer and the friendly person in Tesco livery who delivers your groceries puts one in mind of the milkman of past times. As such, the Tesco delivery person is a brand ambassador for the company and is key in building and maintaining the bond of trust between retailer and customer.

In 2016, \$1.4 billion of venture capital monies was invested in delivery start-up companies and about the same amount was added in 2017. ■

WA based D’Orsogna to double production

Western Australian based, D’Orsogna Limited, has begun construction of a \$66 million food manufacturing facility at Merrifield Business Park, 30km north of Melbourne. The new facility will employ 240 people and compliment their Mt Waverley, Victoria plant opened in 2007.

The D’Orsogna family first had a presence in Melbourne in 1947 when Tommaso and Giovanni D’Orsogna worked there in the food and hospitality industry before returning to Perth to open a butcher shop in West Perth in 1949.

Managing Director Brad Thomason said the new facility would double production capacity.

“We anticipate a large percentage of our expanded production capacity will be produced out of the new Victorian facility, due to its proximity to major markets and its streamlined manufacturing processes,” Mr Thomason said.

The company has finalised the design of the green-field facility, which will incorporate the latest energy and water conservation technology. The new facility will exceed the standards for export approval and the south-east Asian market will become a focus in the medium term.

Currently headquartered at Palmyra, near the port of Fremantle, WA, D’Orsogna produces a range of cured and cooked whole and sliced hams, gourmet continental goods, bacon and cooked and fresh sausages, supplying Woolworths, Coles, Metcash and food service businesses across Australia. The company employs 550 people. ■

Andrew Fuda, Chief Executive Officer,
Western Meat Packers Group.



Generational change sets new direction for WA processor

By Stephanie Flynn

A new day has dawned for West Australian-based meat processor, Western Meat Packers Group (WMPG). Owners, Rod and Shana Russell have implemented a strategy to effect generational change in the company and export market expansion setting it up for a bright and prosperous future.

Heading-up the young and dynamic new corporate team is Chief Executive Officer, Andrew Fuda who, at age 38, is part of a new breed of corporate player with a new way of doing business. Based on collaboration and the use of technology, without losing sight of the benefits of long-term relationships with suppliers and customers established by Rod for the past 35 years.

Andrew Fuda has worked alongside Rod for nine years in what could be described as an echo of the master and apprentice relationship of the old world and has since taken the lead role in the company but with the benefits of a perpetually on-tap Rod when required.

Andrew has since been joined by a host of new blood including Jason Spencer who joined the company from JBS as the new General Manager for its processing and boning operation and Lui Rinaldi, appointed to the role of manger of special projects, after 15 years in the pork sector with Craig Mostyn Group.

A clear indication of the importance of the technological innovation Andrew places on the company growth strategy is the appointment of tech guru, Bill Wong, who joins WMPG from the University of Western Australia.

“Technology is a very big thing for us, I travel overseas every year, mainly searching for new machinery and technology to improve the business – the industry in Europe and the US is one step ahead of us in terms of these type of innovations,” Mr Fuda said.

“We are investing as much into travel as we do into every other aspect of the business as we know the great difference that innovation and technology make not only to the reduction in operating costs but also to our ability to service and meet customer requirements.

“As a consequence of technological advances in our business we can make real time decisions and changes that customers may require. As an example, we can and do make real-time changes in cutting specifications on the spot during our meetings with them.

“It is really all about collaboration and using technology to provide good old fashioned customer service,” he said.

Western Meat Packers was established as a family-owned and run enterprise by Rod Russell in 1983, and the company has since grown to be WA's leading family-owned processing company with an annual turnover of \$150 million and employing some 360 staff across its considerable operations.

In August last year, Rod and wife Shana, effected a buyout of other family members, taking full control of the company and announcing plans for a major up-grade of its abattoir on

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a 250-hectare site in the renowned Margaret River region in the state's south-west.

The investment in the expansion of its Margaret River abattoir will enable the company to fully integrate operations, adding an on-site boning capability in preparation for the accreditations that will allow WMPG to export to China and Malaysia.

The company currently slaughters at Margaret River and transports the carcasses as quarters and sides to its boning operation at Osborne Park in Perth which is located equidistant from both the Fremantle Port and the domestic and international airport.

"We have made substantial investments across our operations but the investment in the Margaret River plant is a strategic one, currently, we can access many notable international markets including Hong Kong, Singapore and the United States markets which highly value the idyllic growing conditions of the Margaret River region where we both produce and source a good majority of our cattle," Mr Fuda said.

"But the expansion will enable us to export offal and all grades of beef into China as well as Malaysia both of which require a fully integrated facility combining slaughter, boning and cold store in the one location.

"The expansion will also enable us to lift our slaughter capacity from a consistent 400 head a day, five days a week to at least 570 head a day five, six or seven days a week which, when added to a hot boning process for increasing numbers, will ensure we can consistently meet the demand from increasing our international market access," he said.

Mr Fuda is heavily focused on ensuring the company is consistent in its supply capacity before it continues to expand its markets as opposed to growing the business before this capability is enabled.



Western Meat Packers' abattoir in the renowned Margaret River region of Western Australia.

He sees incremental growth as the way forward both for the company and the farmers in the region with which it has established long-term partnerships.

“A key component of our strategy is to ensure we do nothing that puts our farmers in the position of expanding their cattle or lamb numbers only to find that there is not enough demand from us which leads to downward pressure on prices due to over-supply,” Mr Fuda said.

“We always keep our eye on the potential result in our approach to growth, consistency is vitally important, both in terms of quality and quantity from the producer right through to the end customer for a range of factors,” he said.

Unlike processing companies on Australia’s east coast, which can source their cattle or lambs across three states with differing climatic influences, WMPG and its competitors on the west coast face unique supply challenges with larger cattle supply in the Spring but limited Winter turn-off.

During this period, the Pilbara and Kimberley regions in the State’s north, at one time, provided the supply during the southern winter but the increasing demand for live cattle for export from those regions has all but halted this supply source.

An expansion of the feed-lot sector has stepped-up to meet this supply gap and Mr Fuda believes that continued growth of this sector is the answer to what has been the state’s perpetual challenge.

But WMPG has taken the approach of addressing potential negative impacts by ensuring that it spreads the risk through diversification of both its product ranges and markets.

“We do a little bit of everything in many different markets which, of course, means that despite what may occur in any one market we can



Jason Spencer (left) joined WMPG last year from JBS as General Manager for its processing and boning operation with Lui Rinaldi who was appointed manager of special projects after 15 years in the pork sector with Craig Mostyn Group.

continue to run effectively and profitably due to this diversification across the breadth and depth of the company,” Mr Fuda said.

“We are US and export accredited which means we can supply organic beef into that market, we also produce Angus, short and long-term grain fed, we bone Wagyu, and we do cow, steer and lamb products.

“I think one of the key secrets to our success is that Rod has always taken the view that the domestic market is vitally important and should never suffer due to export markets and it is a course that I continue to hold for the company.

“So, we take the same approach to our domestic market as we do with our export markets providing both premium and good quality but cheaper products for the retail sector,” he said.

WMPG has three brands – Margaret River Fresh, Perth Meat Export and Western Meat Packers – under which it supplies both its domestic market customers and its considerable export market customer base.

Mr Fuda is the first to admit that its products benefit enormously from the global reputation of the Margaret River

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region which was forged decades ago by the premium wine industry.

He notes that in all its export markets including Japan, Korea, the U.S., Hong Kong and Singapore, there is high demand for sustainably sourced, clean products and that the Margaret River region is renowned for these qualities.

“We have built on this reputation and the growing consumer trends around sustainability, hormone-free and animal welfare by ensuring we produce in accordance with these expectations, there is no question that it is a major growth market for the industry,” Mr Fuda said.

“In the not too distant future, the local infrastructure will enable us to further capitalise on these factors with work having commenced on the expansion of the regional airport to an international airport, the Margaret River Busselton airport, which will be very helpful for us in terms of air freight for chilled products directly from our plant,” he said.

Mr Fuda takes the view that the processing sector faces a unique set of challenges, most notably that it is constricted in its ability to overcome



In the boning room at WMPG's Osborne Park plant in Perth.

the rising costs of production in that these cannot be constantly passed on to customers.

He believes that engineering costs out of the business through investment in technological innovation and automation is the way forward.

Government's role in supporting the industry, in his view, is to ensure that there is a level playing field in terms of Australia's product across global markets and a stepping up in their negotiations with foreign Governments to ensure Australian processing plants are accredited at a much faster pace than is currently the case.

“There are Australian processors that have been on the waiting list for years for the necessary audits and successful accreditation to export to China and Indonesia that have still not been approved for export to these countries,” Mr Fuda said.

“Government also needs to continue to focus on ensuring our range of Free Trade Agreements are expanded and that they enable an increase in our quotas to major markets because at present, we are behind our major competitors like New Zealand given their tariff reductions are way ahead of us and their quotas are higher,” he said. ■

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Redefining PSE in pork meat for improved eating quality

The pigmeat industry needs to revisit the problem of defective meat and set standards for pale soft exudative (PSE) pork, according to new Australian research.

The PSE problem leads to variable eating quality, according to the WA-based scientist Dr Cameron Jose.

His research has found that the incidence of PSE is going unrecorded, and is still prevalent in Australian herds. This is despite a national effort to identify the genetic basis of the condition and to cull animals.

Back in the 1970s, international researchers pinpointed a defect in the halothane gene as the most-common cause of PSE. It was found that animals carrying two copies of the gene suffered stress when they underwent halothane anaesthesia. Meat from these animals is more prone to moisture loss during fresh storage and contains less marbling. Also the meat has a lower post-slaughter pH, leading to earlier breakdown of its protein structure and robbing it of tenderness. It is also notably paler than non-PSE meat.

The Western world has been systematically gene-testing pigs and culling affected bloodlines. "Factors other than the halothane gene are known to lead to the temperature and pH conditions required to cause PSE," said Dr Jose, a post-doctoral fellow at School of Veterinary and Life Sciences at Murdoch University.

"The current data presents a high incidence of PSE," Dr Jose said: "Although paleness is an attribute of PSE, the colour of fresh meat is not associated with eating quality and is a consumer preference, thus colour alone should not be used to determine PSE."

His research, printed late last year in the journal *Animal Production Science*, reported that since the removal of the halothane gene from the Australian herd the incidence of PSE pork might have been underestimated. No studies have been conducted to determine the prevalence of PSE pork "as it is no longer seen as an issue".

"My paper has identified very high rates of so-called PSE in an Australian herd and this is likely to cause extensive quality variation," Dr Jose said. "The best way to detect these defects would be to include a grading system much like the MSA system that identifies dark cutting in beef cattle through applying a pH threshold to ensure a high level of eating quality."



Pale soft exudative pig meat is a defect not a disease giving pork a poorer eating quality.

"We need to be clear that PSE is not a disease or anything like that, it is simply a quality defect."

Dr Jose said the more the pH declines the paler the meat will look, and the more moisture it will expel.

"In pigs, the normal pH of the muscle will be close to neutral. After slaughter this will decline. Typically in pigs, the ultimate pH would be reached within 8 - 24 hours post-slaughter, this means it stops declining.

"However, if the pH drops extremely fast within the first few hours post-slaughter, while the muscle is still hot (+40°C), the combination of heat and acidic conditions can cause the muscle proteins to denature, making the 'soft' texture found in PSE," he said.

An audit of 198 Large White/Landrace cross male pig carcasses from a single farm, collected for six days from an Australian abattoir measured the dorsal muscles for colour, drip loss and the meat pH, and compared the results against the five definitions used to judge defective meat. Almost two-thirds of the carcasses failed the drip-loss test and 68% of the carcasses were classified PSE due to their pH levels.

The criteria of the five different definitions produced different results, he said, adding: "The Australian pork industry must consider the development of an industry standard for describing PSE pork." ■

Alternative proteins sparks global analysis

By Stephanie Flynn

The consumer demand for 'alternative proteins' has sparked a rapid rise in consumption in Europe and the United States catching the attention of agri-business giant, Rabobank, becoming a catalyst for a recently released study into the market and projections for future growth potential.

According to Rabobank's global sector strategist for animal protein, Mr Justin Sherrard, the market for alternative proteins in Europe and the United States is evolving swiftly and he cautions the meat industry, including Australia, not to remain complacent, for to do so will risk losing a sizeable share of growth in the protein consumption market.

According to Mr Sherrard's analysis, the rapid rise in alternative proteins is a consequence of a consumer driven trend to reduce meat consumption, particularly among the 'Millennial' generation, those born between 1980 and 2005, now the largest market segment.

In what is believed to be the first in-depth analysis of the market for alternative proteins and the quantification of market size, Mr Sherrard has estimated the current market at 130,000 tonnes for the European Union and 120,000 tonnes for the US and Canada.

With growth rates over the next five years projected at eight per cent in the EU market and six per cent in the US and Canadian markets being a clear indication of the challenge posed to market share for the animal protein industry.

Rabobank has identified the main types of alternative proteins:

Emerging alternatives – insect and algae-based products;

Meat substitutes – such as tofu and tempeh;

Meat analogues – which include sausages and burgers made from plant-based products; and

Lab-grown meat products – the least mature market entrant based on legume or animal cells.

In all cases, the products are classified as highly processed foods but can supply a protein content of 20 per cent, equivalent to red meat or poultry.



Rabobank's global strategist for animal proteins, Mr Justin Sherrard.

Mr Sherrard said that the leading players in the global meat industry have already recognised the competitive challenge posed by rapid rate of growth in alternative proteins and have swiftly moved to take-up strategic investments in the industry.

"Global conglomerate, Tyson Foods, was the first major meat industry corporation to enter the alternative proteins industry taking-up a minority stake in 'Beyond Meat' in 2016," Mr Sherrard said.

"At the time, the company described the move and its investment as 'game changing' and, in my view, marks the point at which alternative proteins moved from a 'niche' market distraction to become a mainstream market issue," he said.

Other companies have since followed Tyson's lead entering the industry either through ownership or minority investments.

Drivers of Growth Rate

Rabobank's analysis has identified seven major drivers of the sudden growth rate of alternative proteins in the market, both in the EU and the US as well as in other mature markets, Australia included, where consumers are only making marginal increases in meat consumption.

"Three of the strongest drivers – health, animal welfare and sustainability concerns – are negatives for the meat industry and are pushing consumers away from regular meat consumption," Mr Sherrard said.

“The most frequent reason consumers give for turning to alternative proteins is health concerns with concerns about animal welfare featuring heavily along with growing concerns about the sustainability of current animal protein production systems.

“The drivers pulling alternative protein products into the mainstream market are notably curiosity, convenience and personal nutrition.

“One only needs to look at the great rise in demand for meat labelled ‘sustainably produced’, which includes animal welfare, to realise the major market driver these concerns are for consumers,” he said.

The Market

Rabobank estimates the total market for alternative proteins in Europe will increase to between 200 and 250,000 tonnes during the next five years and in the US and Canada the overall market size will grow to just over 200,000 tonnes over that same period.

Among EU countries, the largest markets are the UK, Germany, the Netherlands and Sweden but Rabobank

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suggests that alternative proteins will gain market share in other countries including France and Spain.

These projections are based on the use of alternative proteins as either the main component of a meal or as additives such as pieces or strips in stir-fry, pasta or rice dishes.

But, Mr Sherrard cautions that within each trading zone the market is highly fragmented with certain alternative proteins tipped to grow at a faster rate than others.

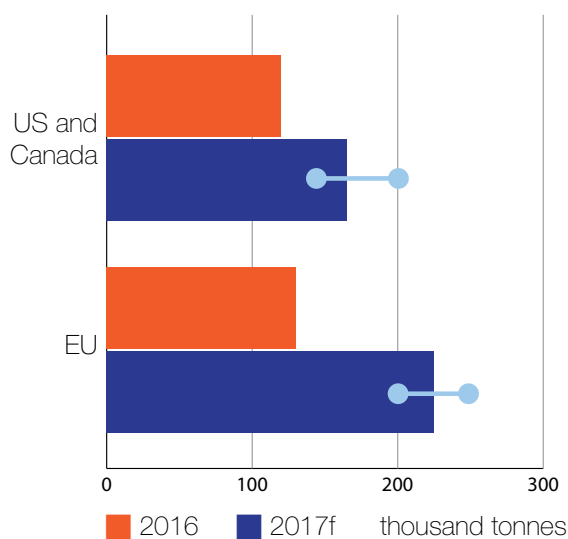
Currently meat substitutes dominate the market over other alternative proteins and will continue to do so.

While consumption of insects is common in many parts of the world, with an estimated two billion people consuming 1900 edible insect species (FAO, 2013), Rabobank notes that in the EU, US and Canada consumer acceptance of eating insects is lower but regulatory changes introduced this year in Europe are likely to facilitate growth.

"In January this year, a new regulation under the EU's Novel Food Directive will reduce the complexity around commercial production of insect proteins and enable the production and marketing of insect-based proteins for human consumption," Mr Sherrard said.

"Insect and algae-based proteins can also be used as a protein fortifier or ingredient in baked goods, cereals, pastas and noodles as well as snacks, which will create additional demand growth for these alternatives," he said.

The size and projections for growth of the alternative protein markets in Europe and the US



Source: Rabobank 2017

Rabobank estimates the current market for these emerging proteins as ingredients at 65,000 tonnes for the EU and 40,000 tonnes in the US and Canada.

Combined, the use of alternative proteins as products and as an ingredient could see the total market reach a level of between 320,000 and 390,000 tonnes in the EU and between 235,000 and 290,000 tonnes in the US and Canada by 2022.

Mr Sherrard believes that while the current market for alternative proteins is much smaller than the animal protein market and will not even get close to the demand for traditional meat products in any region through to 2022, it is the growth rates that are most significant.

"As an example, in the EU, where demand growth for animal proteins is expected to flat-line, the growth in alternative protein products is expected to represent one-third of the increase in total protein demand by 2022," Mr Sherrard said.

"But to realise the potential, alternative proteins need to satisfy consumer expectations in terms of taste and texture, overcome consumer concerns regarding technology and processing in food production and address consumer interest in natural ingredients and food, all of this needs to be done at a competitive price as consumers are not willing to pay a premium.

"It is vital that the meat industry responds to the market drivers propelling growth in alternative proteins as not responding could well lead to stagnation or the experience of declining market share," he said.

Mr Sherrard suggests some key strategies for the meat industry include:

- Product innovation to improve the health benefits of eating animal proteins;
- The adoption of voluntary approaches and standards to managing animal welfare that exceed regulatory standards;
- Taking steps to improve the sustainability of business operations and supply chains; and
- Engaging more directly and effectively with consumers and improving supply chain transparency.

Mr Sherrard suggests that the domestic market penetration of alternative proteins and substitute foods in Australia and New Zealand will lag behind that in the EU and US, where current market development efforts are focused.

"That said, the trends in Australia and NZ often eventually follow what unfolds in the EU and US, and it would be a missed opportunity not to learn from the experiences of producers in these markets," Mr Sherrard said.

<https://research.rabobank.com/far/en/sectors/animal-protein/why-alternative-proteins-are-competing-for-the-centre-of-the-plate.html> ■

A Charcuterie Diary

by P. J. Booth, B.Sc (Hons), LL.M, LL.B.

One might ask, why read a book on charcuterie written by a Melbourne based barrister? The author has asked himself a similar question. He is yet to come up with a credible answer.

A Charcuterie Diary is a record of the author's four year journey into the art and science of making charcuterie. Starting with a dream - some basic cooking skills but no meat or smallgoods training, Booth learned everything about meat cuts, ingredients, terminology and equipment. The book describes the evolution of his knowledge, and as his skills developed, the products he made.

It is discussion of the basics that makes this book interesting.

In his words: "Most of all they usually did not explain exactly what was going on in the process of charcuterie, a matter as to which I became intrigued just because they did not explain it to my satisfaction.

"All these things made me write this book. It is written by reference to my conditions and access to supplies and suppliers in Australia in 2017."

At one level the author is "in love" with the idea of charcuterie: "It is important you (the reader) are a torchbearer of the

traditions, have a place where you can practice your traditional beliefs and culture."

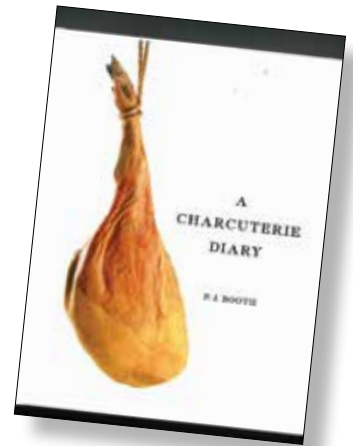
At another he is fiercely conscious of the risks and technical challenges: "Read this stuff carefully. Be careful. Be hygienic... Be scrupulously vigilant concerning mould, temperature and ingredients."

Reflecting on the history of charcuterie the author points out regulators have interfered with production as far back as the mid 1400s, when in France, charcutiers, were not allowed to slaughter pigs but had to buy them from "butchers" nor were charcutiers allowed to sell fresh pork.

A Charcuterie Diary has more than 100 recipes, mainly French using beef, pork lamb, goat, duck and fish. It is available from Books for Cooks, RRP \$75.00.

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See competition details on page 43 ■



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132114	2kg	El Paso Grande Rub NEW	Hold on to your sombreros! Subtle herbs blend to complement a savoury background of garlic and onion – and just the right amount of chilli spices to make your taste buds stand up and pay attention.
132117	2kg	Carolina Gold Rub NEW	Digging for Gold? You've found it here – deep golden tones cradle a delicious combination of flavours based on chipotle, mustard and pepper notes with the rich aroma of smoke permeating the blend.
132118	2kg	Flamin' Matador Rub NEW	Entice your palate with the dancing flavours of chipotle and paprika. The heat in this rub is balanced with savory garlic, cumin and smooth butter. Olé!
132119	2kg	Sweet Tennessee Bourbon Rub NEW	Tennessee, famous for it's dark spirits, inspired this rub harnessing the rugged combination of bourbon and sweet flavours creating a sticky, shiny glaze. Spiced up with orange, chilli, pepper and ginger. Char grilling further enhances the smoky flavor for that wow factor.
132917	2kg	Sweet Memphis Glaze	Creole cooking magic. Flavours of the deep South are combined in this mouth watering glaze which adds visual appeal to any meat cut. Spicy highlights blend perfectly with smoky notes and the solid background flavours of tomato, onion and celery.
132116	2kg	Uncle Sam's Buffalo Wing	A fiery blend including cayenne pepper, chinese five spice, white pepper and a hint of worcestershire sauce. This product forms a shiny orange/brown coating when sprinkled onto chicken wings (or any other desired meat cut), adding maximum flavour.
110220	2kg	Smokey Chipotle Rub	The rub that bites back. Smokey chipotle pulls together distinct smoke aroma and the pungency of dried chilli. Not for the faint of heart.
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A short case study is available from Hydro Innovations that describes the conversion of an aeration system at a food production facility which resulted in operating cost savings of more than \$112,000/year and increases in total EQ tank performance to produce a clearer effluent, controlling odours, settling solids, cooling the water and hydrolysing fats, oils and greases [FOG] causing them to float for better removal efficiency.

The existing system was to add dissolved oxygen to mix and equalise the contents in the EQ tank with submerged aerators. These submerged aerators were supposed

to add dissolved oxygen (DO) which would cause fats, oils and grease (FOG) to float so they would not be discharged with the plant's effluent into a privately run wastewater treatment plant. Secondly, they were to provide cooling of the influent process washdown water (~40o C). These aerators had been in operation for several years and were not achieving the desired conditioning objectives. Further, whenever one of the submersible pumps plugged or failed, the facility had to rent a crane to remove the pump for repairs and then had to use the crane for removal, repair and to reinstall the repaired pump at additional costs on each occurrence. A failure of one or more of the submerged pumps was occurring at least once if not twice a year adding to systems operating costs just for crane rental. The facility was looking for a more viable aeration, mixing and equalisation solution to keep them in compliance.

The facility environmental engineer decided to replace the existing

aerators with a Model VA-1400 venturi aerator and a T8 Gorman-Rupp pump. The venturi aerator was designed to handle 82 L/s. This allows the contents of the equalisation tank to be recirculated four times during a 24-hour period achieving greater oxygen transfer and better mixing and equalisation. With better circulation and cooling in the equalisation tank the FOG is floated for separation and treatment and is not being discharged with the effluent to the local wastewater treatment plant, reducing surcharges.

The plant was able to achieve a \$6,000 per year energy cost reduction, an \$89,000 annual reduction in chemical costs, a \$12,000 annual reduction in non-compliance charges, along with maintenance cost reductions.

The facility environmental manager now has a system that allows him to achieve his discharge permit parameters and he has less concern over maintenance issues and costs.

www.hydroinnovations.com.au. ■

New range of grease separators for trade waste

Management of wastewater from meat processing applications takes a step forward with the extension of ACO's range of in-ground gravity grease separators, now available up to 5,000L total capacity.

Wastewater containing fats, oils and grease (FOGs) and food solids enter the grease separator from the food processing plant. Food solids sink to the bottom of the unit under gravity, while FOGs, which are less dense, float to the top and the treated wastewater flows into the sewer system.

Treatment of trade waste is vital. FOGs in our water ways compromise hygiene, workplace health and safety, plumbing and the environment if not adequately managed. The build-up of FOGs in pipes or through untreated discharge can result in costly repair bills and non-compliance with water authorities and other regulatory bodies.

The range of below ground grease traps from ACO is now available in 3,000L, 4,000L and 5,000L capacities for in-ground applications to complement the 1,000L, 1,500L and 2000L below and above ground units. Food processors can now have greater control over FOGs discharged from sinks, dishwashers, kitchen appliances and other drainage outlets.

A single access point in ACO's below ground units allows for easy access for maintenance and cleaning. ACO has a choice



The range of gravity grease separators from ACO now includes 3,000L, 4,000L and 5,000L units to separate fats, oils and grease in commercial kitchen applications.

of access covers and reinforced precast concrete collars to provide protection of the grease traps for high traffic and load environments.

Constructed from lightweight polyethylene or glass reinforced plastic (GRP), ACO's grease separators feature a smooth finish for easy cleaning and are corrosion resistant to cope with the harshest environments. If buoyancy is a concern, the grease separator design includes external ribs that key into the surrounding soil to assist in preventing the unit from floating.

Lightweight and robust, the grease traps are easy to install and can be incorporated into the overall wastewater system at the design stage or as a retrofit or upgrade.

ACO provides full installation and design support for the decision making process including Revit models, drawings and installation guides.

"The ACO Passavant grease separators give designers peace of mind when it comes to trade waste discharge," says Brad Ryan NSW Sales Manager, ACO. "The new range of capacities enables specifiers and installers to choose the most appropriate volume for the application knowing that the product is fully compliant with Australian water authorities and is easy to install, clean and maintain."

<http://www.acopassavant.com.au/>

Kate Jennings, product manager, T: (02) 4747 4000 ■

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Last issues winners see page 13

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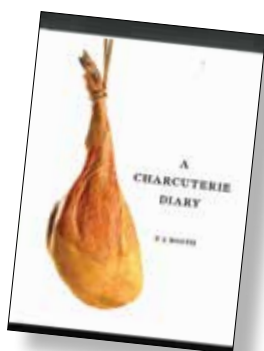
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