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See page 29 and 31

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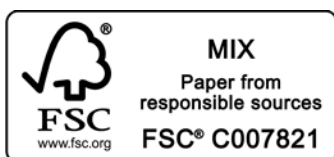
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ICMJ goes digital as coronavirus cancels conferences

Australia's Intercollegiate Meat Judging Association (ICMJ) is investigating new digital delivery methods for meat science training and career networking after COVID-19 (coronavirus) forced the cancellation of its annual conferences.

ICMJ president Peter McGilchrist said that as a result of the measures brought in to limit the spread of coronavirus, the association's national committee had decided to cancel all of its 2020 face-to-face events, including overseas tours, school competitions, and its annual conferences in Wagga Wagga and Rockhampton.

Dr McGilchrist said while protecting the health and safety of the public was paramount, he believed ICMJ also had a responsibility to ensure that the red meat industry was well prepared when the economy enters recovery mode.

"With face-to-face events no longer possible, ICMJ is now preparing a program of activities to be delivered from digital platforms to ensure students and young industry professionals can continue to access training and networking opportunities," Dr McGilchrist said.

"We obviously can't take students for on-site training at the moment, with some meat processors reporting they will be closed to visitors for at least nine months, so we need to find other ways to keep people engaged.

"Ideas we are looking into include training webinars, podcasts with leading meat science researchers and practitioners, a potential virtual careers fair to link students with potential employers, 'how to' videos for sharing via social media, and online quizzes and competitions.

"And with schools and universities now being forced to deliver online, ICMJ will also be investigating how we can develop learning materials that are aligned to their curricula."

Dr McGilchrist said the shift to online delivery would take some time to prepare, but he was confident a new series of activities could be launched by mid-year.

"Some of these ideas may not be feasible, but it is important for the future of the red meat industry that we leave no stone unturned in investigating options for building the knowledge and skills base of its future leaders," he said.

For more information visit www.icmj.com.au ■

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would like to thank industry for their continued support by sponsoring this issue of the magazine while we work through this difficult time.



Behaviour's changing = boost your bottom line with pork

Customers have changed their behaviour as a result of the COVID-19 pandemic and associated measures, but for butchers, this has been a good news story.

While for some sectors the control measures have been hugely disruptive, butchers have been seen as an essential service and customers have been flocking to their stores.

Australian Pork Limited's Venessa Barnes said while it was a difficult time, butchers should be working to seize the opportunity.

"Isolation measures and the changes in the foodservice market have people back in the kitchen and cooking," she said.

"Some people may be using their former commute time to cook up a storm, while others have been juggling more time with their children and looking for more complete options. Shopping habits are also changing, with more households buying fresh meat and more frequently, with an increased weight and spend per trip in March compared to the month prior.



Venessa Barnes, Foodservice Business Development Manager, Australian Pork Limited.

"Butchers' dollar share of trade in March compared to a year ago has grown by 1.8 points to 19.2%*.

"With more customers heading to butchers, now is the perfect time to innovate, expand on offerings and respond to your customers' changed circumstances," Ms Barnes said.

Across the country, butchers are looking at ways to address COVID19 concerns and opportunities, from implementing delivery or click and collect to utilising local chefs to help create new value-add products. Ms Barnes suggests now is the time to build a customer database, to unlock future opportunities.

"Customers share a wealth of information with every transaction and by collecting that, you can strengthen the connection you have with them and build your business," Ms Barnes said.

"Consider using order forms, inquiries and satisfaction surveys to build knowledge of your customers. If you know how many people are in their household, you can offer tailored family or couple meal-deals or weekly meat packs.

"Think about what you already know about your regulars, start making notes and capturing similar information about your new customers."

Isolation measures have also made an online presence all the more important.

"Websites, social media and email newsletters help keep you front of mind," Ms Barnes said.

"Personalisation and service set you apart from the supermarkets, so it makes sense to leverage that. Make a visit to your store satisfying for your customers and, beyond that, provide them with information and opportunities that help meet their ongoing needs. It's a win-win."

Ms Barnes said pork supply was secure, with the Australian pig producers and the supply chain continuing to work to get some pork on Aussie forks.

For more information visit

www.porkbutcher.com.au or email [porkbutcher@](mailto:porkbutcher@australianpork.com.au)

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**APL calculation based in part on data reported by Nielsen through its Homescan Service for the meat category 4 period week to 22/03/2020, for the total Australia market, according to the Nielsen standard product hierarchy. Copyright © 2020, The Nielsen Company.*

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NAT10001110327	Fibrous Casing Clear EP 75X500 CL	Bundle of 20	50 Bundles	Cooked Salami
NAT10001110332	Fibrous Casing Clear EP 90X500 CL	Bundle of 20	50 Bundles	Cooked Salami
NAT10001110335	Fibrous Casing Clear G 43X450 CL/WLP	Bundle of 20	50 Bundles	Fermented Salami
NAT1000111793	Fibrous Casing Clear G 55X500 CL	Bundle of 20	50 Bundles	Fermented Salami
NAT1000111383	Fibrous Casing Clear G 65X500 CL	Bundle of 20	50 Bundles	Fermented Salami
NAT1000111368	Fibrous Casing Clear G 75X500 CL	Bundle of 20	50 Bundles	Fermented Salami

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MC5055MBOX	Casing Beef 50/55 Middle 8X9MT Sets	Box of 8	8 Bags	Fermented & Cooked Salami
MC21285000	Casing Hog 28/32, 1 X Bundle Bag	Bag of 1	20 Bags	Italian Sausage
MC22321000	Casing Hog 32/35, 1 X Bundle Bag	Bag of 1	20 Bags	Italian Sausage
MC22351000	Casing Hog 35/38, 1 X Bundle Bag	Bag of 1	20 Bags	Italian Sausage
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Anthony Scott McGregor

Meat your local butcher

What is your name and the name of your butcher shop and where is it located?

McGregor's Artisan Butcher and Catering located in Macedon Square, Lower Templestowe.

How long have you been a butcher?

I have been a butcher going on 32 years, starting my apprenticeship on the 1st of January 1988.

Why did you become a butcher?

An opportunity arose at our local butcher shop. I applied to the advertisement as school wasn't a path for me as I spent more time on the fairways than the classroom.

Where did you do your training?

I did my training at William Angliss TAFE in Melbourne.

What are the typical products you have in your store?

The main focus of our premises is to provide our customers with a constant, consistent product, from the high-end steaks, which we source from still doing body beef and Argies, to a wide variety of value-added products, including pies and baked goods, hams, porchetta and approximately 12 varieties of heat and serve meals.

Who is your typical customer?

Our demographic is wide ranging, from singles to both parents working, stay at home mums or dads, to the elderly who have done their fair share and are now loving retirement.

What is your favourite products?

I still get a massive kick out of breaking and cutting beautiful steaks and then putting them on show. But I hate upsetting the display and selling them, lol!

What has been the highlight of butchering so far?

I have had numerous highlights from butchering and it has been very good to me. Starting from scratch building up three butcher shops to be successful and then selling them, and still going strong. I was also in a gold medal winning team for Australia as part of the Steelers, and I taught a number of award-winning apprentices, two of which won apprentice of the year.

What are some of the challenges you have faced?

Butchering is a never-ending battle but if you are willing to bend, move and sculpt yourself around the moving trends, you can keep yourself in the game. Or, if you're lucky, a little ahead of it.

What goals do you have for the future?

At the moment, our goal is to set up this premises with the foundation for it to provide a lifestyle for myself and Corey. We have plans to do a major renovation which we hope will set us apart from a lot of the shops out our way. We want to make it a fun, vibrant destination butcher shop which consumers actually like coming to.



What is your retirement dream?

Retirement dream... it seems so far away but it will be here in a heartbeat. I will probably fluff around on ten acres with a couple of horses for the kids, maybe a cow (I will name it), and just clean the pool.

But the main dream would be to take an overseas trip for the first time. America would be good.

How is superannuation important to you?

I have been a member of AMIST Super from day 1 and it has always been a not negotiable for me. My super will help provide the financial freedom in my latter years to do the things I've dreamed of during my working days standing at the block. In my opinion superannuation is an ESSENTIAL SERVICE.

Anthony McGregor (left) with his younger brother, Corey, outside their Lower Templestowe business.

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Quietly achieving her goals

Suzanna Roeger goes quietly about her business, but persistence and a knack for butchery has seen her win a number of awards, and put her on the path to her dream – her own butcher.

Moving out of home to go to university means for most students the need for a part time job to help pay the bills. And so, it was with Suzy who worked as a counter hand with Zone Fresh in Brisbane. She soon realised that Uni was not what she wanted and looked to start an apprenticeship as a mechanic. However, the opportunity to be a butcher apprentice with Zone Fresh set Suzy on a whole new path.

Along the way, Suzy has picked up a number of awards including second place in the World Skills National Championship in 2018 and MINTRAC's Vocational Student of the Year in 2015. The win in the World Skills placed her automatically in the running for the team for the Young Butchers Challenge as part of the World Butcher's Challenge, 2020. Based on these successes, Suzy caught the eye of the Queensland Overseas Foundation and gained a scholarship to work in a country of her choice. Suzy chose Canada.

With a dollop of modesty, Suzy says, "I've done a few competitions and been pretty good at it and won a few awards, which is how I ended up with the scholarship. Ever since I picked up a knife, I've known this is what I wanted to do."

"I finished my Certificate III in Meat Processing (Retail) in two years instead of the usual four, but I had a fantastic trainer in Steve Hassett, who pushed me to my limits and encouraged me to enter the competitions. After my apprenticeship I worked with Billy Gibney at Meat at Billy's. He has been a fantastic mentor and an incredible boss."

With the overseas scholarship, valid for up to two years, Suzy opted for Vancouver as a base to learn and see the differences North America and Canada has to butchering. It became apparent very quickly that the Canadian butcher skills are different to Australia in that the training is based around a nine-month college training course, rather than an apprenticeship. Suzy said that she felt the attitude towards butchers in Canada fell way short of the reputation that Australian butchers have gained. As a consequence, highly experienced butchers are in short supply.

The butchering language has been an interesting aspect of Suzy's work experience, as many of the cuts have an entirely different language compared to Australia. For example, the prime rib, refereed to in Australia as a rib fillet on the bone, retains the fat cap, rump is called top sirloin. Pork is also processed with the rind off, to reduce labour and waste in the shop.



The meat industry in Canada is predominantly beef and poultry (chicken and turkey), with a little pork. Lamb is rarely on the menu and mostly imported from Australia or New Zealand, a lot of shops would struggle to move a whole lamb in a week. Most butchers will break down beef, but most of the pork is boxed. Game meats also feature regularly, such as buffalo, deer, bear and moose.

A stint backpacking across Canada with her knives, landed Suzy in Toronto, which she says has a far greater European influence, with most butcher shops also supporting a bistro, to allow customers to buy fresh meats, as well as ready meals, or eating-in, compared to the home-style approach of Vancouver.

"With the rapid changes around corona virus, I made the decision to head back to Vancouver as soon as I could. I am now working at Hopcott Farms, outside of Vancouver.

"A lot of British Columbia relies on locally grown produce, so the beef is local, the abattoir is about 5kms down the road, and Hopcott Farms grows a lot of its own vegetables which are sold onsite in the Farm shop.

"Many of the butcher/bistro shops employ a chef who wants to learn more about being a butcher and vice versa. It means there is a full kitchen, all the marinades and meals can be made onsite. In Vancouver in particular, butchers and chefs are mindful of nose to tail processing, how to use cuts like offal and have a high awareness of waste."

With the uncertainty around corona virus, Suzy is unlikely to be able to come home anytime soon, but is more than content to learn more about her chosen trade in a country she loves and take a day at a time. ■

Viscofan Globus expands range and service

Viscofan Globus is at the forefront of supplying casings, packaging and protein manufacturing equipment in Australia and New Zealand. Established in 1949, initially Globus was predominantly a supplier to the smallgoods industry but over time its customer base broadened to include poultry, dairy, pet food and seafood industries.

In 2018 Globus was acquired by Viscofan and now has access to global resources and new technologies. Viscofan Globus has the largest range of artificial casings that include collagen, fibrous, cellulose, and plastics. Supported by local printing, quick delivery times are ensured.

Its engineering portfolio now includes, vacuum fillers, mixer/grinders/cutters, forming lines, cooking and smoke ovens and x-ray inspection systems to suit small, medium, and large-scale operations.

Viscofan Globus can provide a total solution that includes equipment, consumables and the technical and engineering guidance needed to ensure optimal operational performance.

Viscofan Globus fully understands that the market is dynamic. New to their product range is Veggie casings – 100% plant based, developed specifically for vegetarian and vegan based products. Veggie is gluten, GMO, and allergen free, thus opening-up the “sausage market” to all classes of vegetarians and religious groups who may have issues with meat related casings. Veggie casings are suitable for fresh and cooked applications, showing good frying ability and a super-tender bite. Casings are available in shirred stick formats for easy processing and can be used with traditional machinery.

Viscofan Globus are the exclusive agents for Tipper Tie in Australia and New Zealand offering a range of clipping solutions for chub and bagged products. SwiStick is a proven, state-of-the-art automated suspension technology for salami and chub production. The SwiStick system loads string loops from the string loop feeder from a TIPPER TIE double clipper. The single salami or chain of salami's are placed on a chain of hooks by the conveyor belt and deposited on a smoking rod. Offering significant labour savings, the base model handles sausages from 20 to 120mm caliber and can hang up to 100 loops per minute on the smoking rod. It can handle up to 22 smoking rods, from 0.8m to 1.4m in lengths, per run. The heavy-duty model SwiStick XXL can handle salami lengths of up to 1.7m and chain weights up to 10kg. SwiStick reduces the physical workload on operators.

Responding to the growth in the use of frozen meat blocks as an input, Viscofan Globus have introduced the drum based Metalquimia D-ICER. This technology offers advantages in speed, optimization of floor space and food safety. The D-ICER is fully programmable giving absolute control, and repeatability of all phases of the thawing process. Drum capacities range from 500 to 5000kg. ■



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Supply Chain Conundrum

The very real prospect of closure due to positive cases of COVID-19 such as those seen in the US, has sent the Australian processing sector rallying to minimise the risk of closure, however, finding markets for all carcase cuts has proved to be a challenge.

The Australian Meat Industry Council and processors have been working closely in the past few weeks since lockdown to ensure that capacity of meat processing can be met, while maximising social distancing and minimising risk of positive coronavirus cases.

Initiatives such as more frequent clean downs of processing facilities, washrooms and dining areas have been employed. Staff are kept to the same shift while working and during meal breaks so that if a case does arise, a small number of staff can be identified to self-isolate.

For many processors, the greater challenge has been the loss of food service business both domestically and internationally. While the lift in retail sales is welcome, not all carcase cuts are suited to the retail market in terms of use and price, leaving many looking into the crystal ball on how to manage premium cuts such as loin.

Many in the industry believe that while the food service sector will rebound post-COVID-19, there is a fear that it may

not be to the levels seen in recent years, with consumers opting to eat out less, or not at fine dining as a result of financial stress, or corporate catering maintaining a tighter belt.

The outbreak of the disease in China in late 2019, alerted many meat exporters to the possibility of reduced meat consumption enabling a shift in target markets. However, the lockdown of business and borders in mid-March virtually overnight, left a number of processors and wholesalers reeling.

Brand owners around the country are now facing the prospect of how best to use the full carcase.

Stockyard Beef CEO, Lachie Hart, explained that they, like other brand owners, had seen the increase in demand in retail, but the problem is more about how to maintain the carcase balance across all sales activity so that oversupply in select cuts is minimised.

“The cuts that would be used for food service, like loin, are only part of the carcase, while others go into retail or processing,” said Mr Hart.

“We had an inkling of what was to come with the slowdown in China and countries like Taiwan and Hong Kong and were able to divert the high-end cuts into other food service markets that still operated. The closures in March, within a few days meant we had to make some hard decisions as to whether those cuts would go into retail and we cop the price drop on the chin or to hold them.”

The panic buying felt by butchers resulted in some offloading the higher valued cuts into ground beef, to meet customer demand. For some butchers, the higher wholesale price of those cuts was accepted by the customer.

Estimates by RaboBank suggest that for every 10% drop in food service sales, only 3% is re-couped by diverting it to retail with ‘many meat and poultry companies cutting back production of pricier specialty and value-added products and offering more affordable commodity items’.

“The industry demand cannot be met by turning on a tap. We can look at shortening feed times, but for long fed programs like Wagyu, you can’t just create more and feedlots are pretty much full,” said Mr Hart.

Other proteins such as seafood are now available at heavily discounted rates through the supermarket, but still represents a wholesale rate that is lower than that obtained through food service. The conundrum is whether the consumer will continue to expect higher quality product at lower prices through retail or if it can be diverted back into food service and regain the prices seen prior to the pandemic.

“It is a crystal ball question, and the answer changes every week,” said Mr Hart.



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Lachie Hart, Stockyard Beef reflects on the effect COVID-19 has had on industry.

"I've seen a number of brand owners try different things, including passing those cuts in margin back down to the producer with reduced livestock or carcass pricing.

"Others are diverting into retail at either a loss or break even to maintain the relationship moving forward and for future opportunities. We can't afford to stop our supply to important retail clients just because margins on loin cuts are impacted. Breaking that important relationship and going back in six months to resume business is not likely to work, as the retailer will have gone elsewhere for supply.

"Some brand owners are slowing production down to reduce volumes or feeding cattle longer. For the moment, feed costs are less than the potential loss we are seeing through processing without a profitable market for some items. However, feeding cattle longer does have a larger impact on cash flow which is vital during these uncertain times."

The riskiest tactic that Mr Hart is seeing is to hold and freeze the high-end cuts in the hope that the markets will re-bound. Frozen cuts have a shelf-life of up to two years, however, once in a carton, the destination market is determined. Country labelling requirements on carton product include country-appropriate labels – for example, once in a carton destined for China, that is where it needs to go. If the market lifts in another market such as the Middle East or Europe, those cartons labelled for China cannot be used. Frozen product in storage consumes a lot of working capital. In addition, once frozen, high-end cuts lose the premium price as fine dining will pay a premium for fresh chilled or dry-aged.

Today's solution for Stockyard Beef is to leverage the overseas markets into new business models that echo the online system that the industry is seeing locally.

MLA has identified in recent years that China in particular has a growing online business model by consumers rather than going to the traditional supermarket or market outlets.

"We looked at doing online direct from Australia, but actually find we are better to develop capabilities in-market. For Stockyard Beef to develop a portion-cutting business for overseas demand, it is only going to be frozen product.

"By building that capability in-market in countries like China and South Korea means as a chilled premium cut, we can produce it in-market, date it today, deliver it tomorrow in home and still provide the consumer with a first-class product. We have been able to divert some of our loin cuts into online channels overseas."

"People still want to eat protein and the trajectory of consumption suggests that will still be the case as we get closer to 2050. The question is, what will the industry's business model look for all sectors. For fine dining that may take premium product like Wagyu, it will rebound but it is unlikely to recover entirely. I think many consumers and businesses will be making different choices in the future. Businesses may continue to use technology more to communicate with clients resulting in less people travelling around the world staying in hotels. Tourist travel could also be reduced with people preferring to holiday locally. Consumers may question how they spend depending on their financial security opting to reduce their spending in premium beef and fine dining restaurants. If these scenarios play out it would have a significant impact on Australia's premium beef sector." ■



The New Zealand Butcher Experience

Panic buying in New Zealand during the early days of COVID-19 led Mike Hanson of Netherby Meats, Ashburton in the South Island, to stock up – only to discover snap lockdown rules meant he had to shut.

“In the back chiller – we probably had four or five beasts for the shop and 30 hoggets to put somewhere, and the freezer is not big enough to store all of this,” he said, adding he would have to give away or throw out the meat.

The new laws meant that butcher shops, but not supermarket butcheries, had to shut.

On March 24, Mr Hanson was told by his local MP and Retail Meat New Zealand that he was allowed to remain open as an essential business. The next day he told customers ‘with a heavy heart’ that he had to shut.

“I don’t know if I’m open or closed,” he said. “I’m just really quite confused and sad about the whole situation.” He had to switch to online sales.

And meanwhile, the milk bar next door remained open. “They’re selling smokes and Coke and fizzy drinks – and what are they doing open?”

North Island butcher Doug Jarvis, in Tauranga, found out about the lockdown the day prior. Losses from his three stores amounted to about NZ\$150,000, he said.

“At 4.15pm, when we’ve already ordered thousands of dollars’ worth of stock, we were told by Retail Meat and the Retail Association that all butchers, bakeries and fruit and veg shops had to close,” he said. “Disaster!”

“There was no defining ruling [what] you could do online,” he said. “We have an online system, a webpage, we were told even then, ‘no you can’t open’ so we just closed.

“I still have to pay rent and all my other utility bills. I can’t not pay electric because I’ve got fridges and freezers running. There’s another cost, it’s just cost, cost, cost. Nothing’s coming in but there’s massive amounts going out.”

He has now reopened for online and phone orders and doing the deliveries himself. “When we found out we could do it online, it was just like ‘right guys, let’s get going!’”

NZ’s major Mad Butcher chain estimates it had about \$3 million worth of meat which could not be donated or frozen.

However, some of the stores in the 20-store part-franchise continue to trade. Two Auckland outlets, owned by group chief executive Michael Morton, cited legal advice when they decided to stay open in defiance of the government and of the chain’s founder Sir Peter Leitch, a supporter of total lockdown. The stores that stayed open were visited by police, who were shown lawyer letters.

Mr Morton said: “Everybody was panic-buying up until that time and we panic-bought as well from our supplier. Our sales were up 60 per cent week-on-week, so we panic-bought as well because we had to keep serving all these customers.

“We bought all of this product and then they changed the regulations ... so we didn’t even get an opportunity to try and sell that product.”

“I feel gutted by it. I feel that it was completely underhand in that they changed the rules after we had closed.”

He said their legal advice supported the stores remaining open due to the scale of the chain. “Our stores are not small butcher shops. They have the size and scale of a small supermarket,” Mr Morton said. “We believe we clearly meet the government’s criteria and provide a safe and local alternative to the big supermarkets. We have spent significant sums to ensure we have in place the correct hygiene and safety measures in our stores.”

Restaurants and cafes take about 20 to 25 per cent of meat sold in New Zealand, he said, while butcher shops take another 20 per cent.

Mr Morton said: “That means the two supermarket chains have to produce basically another 45 per cent more meat than what they currently sell to be able to meet the demand if everyone still eats the same amount of meat.”

He noted that supermarkets do not offer cuts such as pork bones, hangi pork and lamb flaps favoured by lower socio-economic customers.

Public pushback has been vocal across social media. An online petition scored 117 requests for butcher stores to remain open.

However, PM Ardern told her nation: “Food is essential, but if we simply allowed every food outlet in New Zealand to open we wouldn’t achieve what we need to achieve, which is as little contact as possible between one another, we also need to reduce down the risk to as many workplaces as we can.”

The Government has since advised that essential businesses, like food providers who offer contactless payment and deliveries, can operate, as can stores in small rural communities with no supermarkets.

There is ongoing confusion for example, even with the doors shut to retail, butchers who process pigs or supply supermarkets are allowed to stay open.

NZ Agriculture Minister Damien O’Connor accepted an eleventh-hour appeal by NZ pigmeat farmers that there currently wasn’t enough capacity to hold pigs on farms or

carcasses in processing facilities. Without outlets, an animal welfare issue was looming.

“We need them to operating to ensure that pigs can continue to be processed and are not backing up on farms, leading to animal welfare issues,” the minister said. “The pork industry is domestically focused with limited export to the Pacific Islands, so there aren’t as many avenues to offload product into other markets.”

The news is not uniformly bleak. Retail Meat NZ is keeping the industry calm and highlighting the firms that have successfully shifted to online sales.

Dan Klink of Mangawhai Meat Shop, an hour north of Auckland, shifted to email and phone orders with free home delivery and reports he is trying to keep up with “thousands of e-mails”. He said: “This is something all very brand new to us but we think we have ironed out all the kinks and streamlined things the best we can.”

Further up the supply chain, NZ abattoirs are also struggling to cope. Beef + Lamb NZ and the Meat Industry Association (MIA) believe social distancing has halved sheep throughput capacity and reduced beef lines by 30%.

Processors and exporters are reportedly moving inventory out of cold storage to free up space for incoming stock.

Could there be a flow-on impact on trans-Tasman trade? NZ red meat imports into Australia rose 5% between 2018 and 2019, with beef the most commonly-traded meat.

Australia was the NZ meat industry’s 10th largest market in 2019, with exports of NZ\$170 million. The major exports to Australia in 2019 were prepared meat products (NZ\$80 million), blood products (NZ\$30 million) and hides and skins (NZ\$22 million).

MIA chief executive Sirma Karapeeva said: “Overall there is significant two-way trade in red meat and co-products between the two countries, which is driven by supply and demand in each country and facilitated by the open trading relationship under CER.

“Most of the NZ meat exports to Australia over the last five years have been beef rather than lamb. The majority of exports are co-products, particularly prepared meat products (mostly beef-based).

“NZ also imports red meat and co-products from Australia. We import more beef and sheepmeat from Australia than we export there, but we also import prepared meat products, blood products and pet food.” ■

Meat Training: still on, but modified for the times

TAFES and independent meat and food training institutions across all states are offering their normal range of courses. Enrolment times are broadly unchanged. Class learning and practical assessment formats, at school and workplaces, have been modified to ensure student, teacher and workplace safety. Enrolments in courses are running at normal levels.

Across all TAFES teaching staff have adapted courses for students to study from home via digital/on-line and/or paper-based materials.

Guidelines allow for teaching teams, at each institution, to develop formats that factors-in the size, space, and availability of training facilities and student numbers.

The TAFE NSW website includes a section, 'Get Ready for Term 2'. This describes the software required to connect to classes, how to operate the software, how to set-up a workspace at home. It also has an extended section on how to interact with your teacher and class mates, using the

computer-based interface, how to signal you want to ask a question and how to respond to a question from your teacher.

Students working from home will have regular calls from their teachers. All students are encouraged to contact their teachers to discuss course structure, delivery systems and course content.

Most TAFES have also made provision for students who cannot work from home to attend the campus. Social distancing and hygiene guidelines are being enforced. Typically, students will be required to complete a wellness check. Class sizes have been reduced and moved to bigger classrooms to ensure physical distancing.

Courses that require on-campus hands-on training or assessment will proceed under stringent safety protocols. On-campus activity will be limited to courses where it is necessary and where remote training is not viable.

In general work placements are proceeding where they can be achieved safely. To proceed, placements need the approval of the student, parent/guardian and the employer.

The above is a summary of guidelines from training institutions across the country. Institutions are subject to state regulation that may differ between states and over time.

Students already enrolled should keep in close contact with their teachers and prospective students should study the website of the institution where they plan to enroll and closely monitor developments as they unfold.

For more information visit:

www.tafensw.edu.au www.swtafe.edu.au
www.angliss.edu.au www.axial.edu.au ■



Staying up to date with what's happening in our industry is always important, but in the current climate it is crucial.

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Government Assistance

The federal government is supporting small business to retain apprentices and trainees. Employers can apply for subsidies up to 50% of the apprentice's or trainee's wage to a maximum of \$21,000 per trainee/apprentice. The subsidies also apply to the engagement of new apprentices.

Rules apply to the timing and the eligibility of business and trainees/apprentices. Claims must be lodged by December 31, 2020.

For more information visit:

www.dese.gov.au
www.australianapprenticeships.gov.au

COVID-19 Stimulus and Support Measures Guide

Hang in there – The Devil is in the Detail

By EGU Accounting and Taxation

As usual, “the devil is always in the detail” when it comes to Government announcements regarding help for their constituents. The stimulus and support packages do help, but there are gaps and they will not return most adversely impacted businesses or people back to their pre-pandemic position. It will all take time.

It's important to understand the timing of the each of the measures as many are not immediate. You also need to understand who is eligible and how. We are here to help you as much as we can to ensure that you have the right information and can make informed decisions.

There are a few peculiarities with the support measures and incentives, and they will not apply equally across the community.

The structure of your business may affect your eligibility for support. The definition of business is any trading entity that meets the eligibility criteria. For example, the JobKeeper Payment legislation means that a payment will only be made to an adult beneficiary of a trust and the Cash Flow Boost legislation excludes those who are structured to receive a trust distribution or a dividend paid by a company.

There are many family trust business structures in Australia where the trusts do not have employees, and the trustee of the trust distributes the profits of the trust to the family members at the end of the financial year.

The current legislation suggests that only one partner in a partnership, one beneficiary of a trust, and one director or one shareholder in a business can receive the payment.

It is important to remember that there are also integrity rules preventing artificial or contrived arrangements from being used to access the cash flow boost.

March 12, 2020 is a crucial date for accessing the cash flow boost. Relatively new business entities that have not lodged any tax returns or activity statements by 12 March 2020 might miss out unless the Commissioner grants discretion around the timing requirements.

Also, with the \$1,500 wage subsidy, employees eligible for the subsidy had to be employed by the business claiming the subsidy as at 1 March 2020. Some will miss out.

If you are experiencing financial hardship because of COVID-19 you may consider contacting your bank, your landlord, your insurance/equipment leasing companies, the ATO, and the people who supply you meat and consumables to see if they can help.

It is worth noting that in most cases you will have to prove hardship and the debt obligation will have to be repaid at some stage. However, the ATO and some leasing companies are offering an interest free deferment of payments. Each application will be assessed on its individual merits.

It can be confusing and frustrating, however we will help you work through it and ensure that you are able to access the support that is available to you.

There will no doubt be further announcements by the Government with accompanying legislation and it cannot be emphasised highly enough that you keep in contact with your professional advisers to ensure that you know exactly what you are entitled to receive. We will continue to update our blog as legislation is introduced. ■

continued on page 18



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Snapshot of Assistance Available to BUSINESS AND INDIVIDUALS

From	Stimulus	Eligibility	Trigger for Support
BUSINESS			
30 March for up to six months	\$1,500 JobKeeper payment A \$1,500 (before tax) per fortnight per employee wage subsidy paid through employers to the employee and administered by the ATO.	Employer - > 30% downturn (>50% for businesses with turnover of \$1bn or more) Employee – employed as at 1 March (other conditions apply) Self-employed individuals can also access this	Employer applies to ATO
From 28 April 2020	Tax-free cash flow support between \$20,000 and \$100,000 (paid in two rounds of up to \$50,000) for businesses with an annual aggregated turnover < \$50 million and make certain payments to staff by 30 June 2020.	Annual aggregated turnover < \$50m Pay staff between 1 January 2020 and 30 June 2020 (includes not-for-profit businesses) Business must have been established by 12 March 2020	Automatic on lodgement of March Activity Statement and later Activity Statements
12 March 2020 – 30 June 2020	Instant asset write-off increased to \$150,000 and extended to businesses with an annual turnover < \$500 million	Annual turnover < \$500m Assets used or installed ready for use between 12 March and 30 June 2020	2019-20 tax return lodgement
12 March 2020 – 30 June 2021	Accelerated depreciation deductions - ability to deduct 50% of the cost of the asset plus normal depreciation deductions on the remaining cost amount in the year of purchase.	Annual turnover < \$500m New assets acquired from 12 March and used or installed ready for use by 30 June 2021	2019-20 and 2020-21 tax return lodgement
1 Jan 2020 – 30 Sept 2020	Wage subsidy of 50% of an apprentice's or trainee's wage for up to 9 months from 1 January 2020 to 30 September 2020. Accessible to businesses with less than 20 employees. Employers receive up to \$21,000 per apprentice (\$7,000 per quarter).	Businesses with < 20 employees. Employee must have been paid by business from 1 March 2020	Applications from 2 April through Australian Apprenticeship Support Network providers
25 March – 24 September 2020	Solvency safety net – temporary 6 month increase to the threshold at which creditors can issue a statutory demand on a company from \$2,000 to \$20,000, and an increase in the time companies have to respond from 21 days to 6 months.	Companies and Directors Debts incurred in the ordinary course of running the business	
25 March – 24 September 2020	Safe harbour from director's duty to prevent trading while insolvent – a safe harbour for directors temporarily trading while insolvent as a result of the pandemic	Company Directors Debts incurred in the ordinary course of running the business	
	Ability to reduce PAYG instalment amounts to zero for March. Ability to claim a refund of PAYG for some quarters.	Financial distress	Contact the ATO
	Up to 6-month deferral for payment of activity statements, income tax, FBT, excise duty	Financial distress	Contact the ATO
	Ability to move from quarterly to monthly reporting for those who need access to GST credits quickly	Quarterly GST reporters	Contact the ATO
	Bank support for landlords who do not evict their commercial tenants	Landlords of commercial property with loans <\$10m	Contact bank

From	Stimulus	Eligibility	Trigger for Support
INDIVIDUALS			
25 March – 24 September 2020	Expanded access, reduced asset testing, and waiting times for social services payments Access to social services payments has been expanded to sole traders and contractors, and those who have been stood down. Waiting times to access support has also been reduced. Asset testing has also been suspended. Income tests still apply.	Sole traders, the self-employed, casuals or contractors whose income has reduced Permanent employees stood down (and not receiving any payments from employers or insurers) Carers of people affected by Coronavirus Subject to income testing	Unemployed, stood down or reduced income Contact Centrelink
27 April 2020 for 6 months	\$550 Coronavirus supplement - paid fortnightly to certain social services recipients for 6 months	Individuals receiving eligible social services payments	Automatic
12 March 2020 – 13 April 2020, and 25 March – 24 Sept 2020	Tax-free \$750 income support payments paid in March/ April and again in July to certain social services recipients	Individuals receiving certain social services payments	Automatic
25 March – 24 September 2020	Bankruptcy safe harbour. Amount of debt required by a creditor to initiate bankruptcy proceedings increased to \$20,000, and time to respond to bankruptcy notice increased to 6 months.	Proceedings initiated between 25 March and 24 September 2020	
1-May-20	Deeming rates reduced – from 1 May, deeming rates reduced to a lower rate of 0.25% and upper rate of 2.25%.	Deeming is the interest rate the government deems as income on your financial assets	It affects the amount of your pension payment
SUPERANNUATION			
25 March – 24 September 2020	Early release of up to \$10,000 in superannuation – individuals in financial distress able to access up to \$10,000 of their superannuation in 2019-20, and a further \$10,000 in 2020-21. Withdrawals are tax-free and will not affect Centrelink or Veterans' Affairs payments.	Unemployed Eligible certain social service payments Redundancy, working hours reduced >20%, or for sole traders, reduction in turnover by >20%	Applications through myGov from mid-April 2020
2019-20 and 2020-21	Temporary reduction in minimum superannuation draw down rates – superannuation minimum drawdown requirements for account-based pensions and similar products reduced by 50% in 2019-20 and 2020-21.	All account-based and similar pensions	
1 May 20	SMSFs with commercial property able to provide rent relief to tenants	Trustee assessment	Pandemic related financial distress of tenant

This guide was written by EGU Accounting and Taxation.

The above material should be used as a guide only. Businesses and individuals should seek personalised professional advice before taking action.

EGU Accounting and Taxation, T: 1300102542 E: hello@egu.com.au

Superannuation

Superannuation and taxes. Two of life's constants. But how you manage your super can make a lot of difference for when you retire.

The concept behind superannuation is to provide you with a source of income when you retire. Paid as part of your salary entitlements, your employer is required to put aside a minimum of 9.5% on top of your wage with your superannuation fund. In most circumstances, it can't be accessed until retirement.

Superannuation funds then invest on your behalf to ensure that your retirement fund continues to grow until you retire. There are a number of basic super fund types:

- Industry Super Funds
- Retail Super Funds – usually run by financial institutions
- Public sector funds – available for state and federal government employees
- Self-managed Super Funds (SMSFs). As the name suggests you can set up your own Super fund within the Australian Tax Office regulations.

What are the obligations of the employee for your Super?

As an employee, you are required to pay the Super into the nominated employee Super Fund, the amount should be shown on the payslip – either at the same time you pay your staff, or you can elect to pay quarterly. If your company has its own preferred Super Fund, that's fine, but the choice is ultimately up to the staff member which one they choose. New employees must be given the Standard Choice Form to nominate their super fund within 28 days of starting work.

The actual amount of Super paid, at 9.5% is calculated on the estimated income, therefore it is important to calculate the income with leave loadings, holiday pay or other allowances and expenses factored in. For staff members under 18, Super only needs to be paid if they earn more than \$450 per calendar month (before tax). Records of the Standard Choice Form, payments for five years and any other written information needs to be kept.

According to the ATO, the most common mistakes made by employees regarding Super are:

- Not paying enough Super
- Missing due dates for payment
- Not keeping accurate records
- Not passing on employees Tax File Numbers
- Not understanding when Super should be paid for contractors
- Error recovery: missing a date or amount and not lodging a Superannuation Guarantee Charge Statement

As an employee it is important to:

If you are new to the company, make sure your employer has given you the Standard Choice Form to choose your Super Fund. If you need to assess which one is best for you there are numerous comparison sites such as Canstar, Finder and the Government's moneysmart.gov.au websites.

Provide your Tax File Number so that you don't get taxed at a higher rate.

Keep an eye on your Super fund account – either through MyGov or through your account with the Fund. Your payslip might say what you should be getting in Super, but ensure that you actually do. If the value is roughly around 10% of your income, then it is likely to be about right.

You may also choose to contribute more to your Super Fund to give your retirement a bit of a boost.

If you believe that the correct amount of Super has not been paid, it is important to ensure that you have got all the written material and check with your employer that it has been paid and to where – it may be a simple case of the wrong account or fund.

If the concern needs to be taken further, make a report with the ATO to investigate and make a claim. It is important to follow up on missed Super in the past five years, as after that time, the ATO are unlikely to pursue the claim. ■

Superannuation amid COVID-19 (as at 22 March 2020)

For small businesses, the ATO has set up an Emergency Support Infoline 1800 806 218 to help those are experiencing financial difficulties with tax and super obligations as a result of the pandemic.

From 20 April, 2020, the ATO has advised that applications can be made online myGOV to access up to \$10,000 of superannuation before 30 June 2020, and a further \$10,000 between 1 July and 24 September if you have been financially affected by COVID-19.

In any event, check with your Super Fund and your financial advisor to see what works best for your situation.

Aerator conversion nets lower energy costs, eliminates surcharges and enhances lagoon performance

A food processing facility in Wisconsin discharges the plant's effluent into a wastewater treatment lagoon system for the reduction of BOD, Phosphorus, Ammonia (NH₃) and TSS prior to discharging to the local wastewater treatment plant. The facility discharges ~285,000 kl/day with BODs ~350 mg/L. The lagoon is very large [195m x 75m] with an operating depth of 2.7m to 3m with sufficient retention time for biological processes. The lagoon originally was equipped with five (5) 11kW high-speed floating impeller-type aerators [AireO2] and three (3) 15kW [AireoMix] draft tube surface aerators for a total of 100kW of connected power. While these aerators were able to mix and recirculate liquids in the lagoon, they were not capable of adequately influencing the biological treatment for organic reductions to include nitrification. Additionally, there was an increasing sludge accumulation of almost 1.0m or > of varying thickness [>3% solids] throughout the lagoon. In this configuration the facility was not able to meet their discharge permit limits issued by the pretreatment coordinator at the local publicly owned treatment works (POTW) and was subject to surcharges for excess BOD, TSS and Phosphorus.

As a result of not being in compliance with their discharge permit the facility was being fined for BOD in excess of 200, and TSS >100. They began to look for alternative treatment solutions to bringing the facility into compliance, as surcharges were approaching \$70,000/year. The company's staff engineer approached a Venturi Aeration, Inc. distributor for a solution.

The plant was recommended a staged approach. First, replace two of the existing aerators with 2 x VA-600 Venturi-Aerators, each "driven" by a Gorman-Rupp 84A52-B [4"] self-priming pump. Another two Venturi-Aerators would be installed when the other two floating aerators needed replacement.

Due to the depth of the sludge (2.0m below the surface air/liquid interface) the AireO2 units and the floating surface



Gorman-Rupp 84A-series with Four Inch (4") Model VA-600 Venturi Aerators.

aerators were not effectively resuspending the sludge for digestion, but rather they allowed the sludge to accumulate on the bottom. The bottom 560mm of sludge was >3% solids while the next 300mm was a slurry varying between 1 to 3% solids. The sludge was occupying 25% of the lagoons total volume.

With the pump/venturi system, the pump suction was positioned at the bottom of the lagoon so that the most anoxic liquids are pulled into the venturi aerator units, achieving a high oxygen transfer. And treatment of the sludge.

Energy Savings

In the first year, the added two venturi aerator's brought the facility into compliance. After the addition of the other two Venturi-Aerators, the eight (8) surface aerators could be discontinued. Therefore, there were energy savings due to less operating power [52kW vs. 100kW] was 48kW x 24hrs = 1152kW per day. At 10c/kWh, this is a \$115.20 saving per day, \$3,404/ month or \$42,048 per annum.

A concrete pad was poured on the dike of the lagoon to support the pump and a unique bracket support system was attached to the same concrete pad for the suction and discharge piping.

Results

With all four venturi aerator systems in operation the facility is in compliance with their discharge permit. BOD levels average 35, TSS 70, Ammonia <1.0 mg/L, Phosphorus <3 mg/L, Nitrate <1.0 mg/L. Because the venturi aerator is consistently stripping the carbon dioxide generated by the aerobic bacteria, the pH is buffered non-chemically. The facility's discharge pH averages 8.0 without the addition of alkalinity. The sludge blanket has been reduced to almost zero on the "aerobically treated" side of the baffle, while in the quiescent zone there is only an average of 100mm of sludge <3% solids. ■



Suction Piping into Gorman-Rupp pump & Venturi unit.

High Street Butcher Renaissance

Shocks and disruption to any system quickly highlight the elements that are working, and all too clearly, the weaknesses. Any system, is only as strong as its weakest point.

The meat industry is a system with a complexity of elements that takes the livestock from the farm through to the consumer. It involves processing, transport, storage, value-adding, governance and consumption.

The events of the pandemic have shown that the consumer clearly views meat products as a necessary essential item, with many butchers experiencing the panic buying that cleared shelves and prompted early



Tammi Jonas ethical pig farmer and president of Australian Food Sovereignty Alliance.

closes in order to re-stock and give staff a break from the high-pressure sales.

The advantage of the independent butcher is the ability to re-stock, take orders and work with individual customers to provide the products that the customer wants.

It is in this light, that the independent butcher can leverage new customers to the butcher store to become long term business once the crisis is past. But what happens if part of the system supply chain is forced into shutdown due to staff COVID-19 illnesses?

It has become quite evident what the consequences are in the week prior to Easter when JBS, Cargill and Tyson in the USA closed a number of meat processing facilities. Not only were hundreds of staff stood down, but the supply through to retail will be impacted. An analyst with Rabobank USA said that the country had enough inventory for a month but the flow-on effect to farmers, who still need to send animals to the abattoir, and butchers who don't hold a month's worth of stock will feel the effects within a couple of weeks.

In an interview with Farmonline, butcher Trevor Hill said he had been feeling the impact of panic-buying that many butchers had experience and noted that 'the centralised production supermarkets operate under means logistically they can't ramp up their



Nick Rose, executive director of Sustain: The Australian Food Network and lecturer at William Angliss Institute.

supply quickly but butchers can – we just walk over to the fridge and go let's put that through the mincer now'.

A significant proportion of Australian meat production is exported or into hospitality. With border and restaurant closures, much of it can be re-directed into retail to meet demand and keep the supply chain moving.

Early indications also suggest that as we 'stay home', more people are taking the opportunity to cook meals, potentially increasing the weekly consumption of meat bought from the retail butcher.



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The Red Meat Advisory Council outlines the Australian supply chain as composed of:

- Transporters and livestock freight
- Retailers
- Butchers
- Wholesalers and cold chain
- Livestock production
- Animal health professionals and suppliers
- Saleyards
- Export
- Feedlots
- Animal feed and pharmaceuticals
- Abattoirs and processing

The move into home delivery of product and meals gives an ideal opportunity for butcher shops to work collaboratively with chefs to create value-add products to suit current consumer demand.

Nick Rose is executive director of Sustain: The Australian Food Network and lecturer at William Angliss Institute and a specialist on food systems notes that the pandemic has highlighted the vulnerabilities of a bigger, long distance supply chain and that people are focusing on the essentials of life and secure access to food.

“This shift in focus has happened very quickly and likely to stay post-crisis,” said Nick. “One of those shifts may be the move toward more local and regional farming systems and economies, which some butchers are already employing with direct relationships to farmers, particularly for customers who want to know more about where their food comes from and the values and ethics of the farmer and butcher.

“The trajectory towards more centralised abattoir and processing plants in the past decade, and the closure of smaller, regional abattoirs has been detrimental to many small towns with loss of employment and a diminished community. In the current environment diversification and de-centralisation of our meat supply chain will mean greater resilience in the face of shock and major disruption.”

In Vermont, USA, the state government has successfully taken on a project to decentralise the food systems which has successfully re-invigorated small towns, seen employment growth in agriculture and food industries and given producers the true worth for their efforts and product.

“What this pandemic has really demonstrated is that farmers – and butchers – are essential to our food frameworks and should be recognised accordingly. It has also highlighted that access to food that is value for money and nutritious should be available to everyone. Putting programs in place post-crisis will be just as important then as it is now, and the butcher can have a significant role to play in that,” said Nick.

Many butchers have already taken on a paddock to plate philosophy, whereby the butcher works directly with a

farmer to supply beef, lamb, pork and poultry and uses this as a point of difference for the store.

There are a number of food business models available, such as community supported agriculture (CSAs), farmers markets and food hubs, which are based on direct relationships between the farmer and the consumer.

Tammi Jonas, an ethical pig farmer in central Victoria and president of Australian Food Sovereignty Alliance said that many CSAs are now at full membership as a result of the pandemic, and are likely to remain so post-crisis. Tammi also conceded that while CSAs and farmers markets did have the perception of higher retail prices, quite often it is not the case and urges consumers to compare supermarket prices to independent retail.

“The long game is to get our food production systems structured so that everyone has access to good food, we have reduced dependence on mega-operations and greater agility and resilience for the rough times through regional and local producers, abattoirs and processors.

“The opportunity for butchers to work with chefs to provide meals from secondary cuts (and not mince!) and connect with local growers and their community has never been better. Most butchers are community-minded and good at selling their product, now is the time to re-negotiate with the supply chain or connect with local farmers.” ■

CBS continues to support our customers during the current crisis and remain open for all our service capabilities. We are operating on a split shift to ensure we endure the crisis and offer continued service and products.

We would like to thank everyone for their continued support and look forward to working on new projects as they arise throughout the year.



First Timer Wins Wagyu Beef Competition

The results for the 2020 Wagyu Branded Beef Competition have now been announced and watched by viewers from within the Wagyu industry, hospitality and retail via an online live streamed award ceremony.

Broadcast on 15 May, 2020 the award ceremony announced the Gold, Champion and Grand Champion awards with presentations by our valued sponsors and comments from brand owners on their journey to bring award-winning Wagyu to fruition.

First time entrant Stone Axe pastoral was declared Grand Champion for 2020 with their Stone Axe brand.

The awards celebrate three classes of Wagyu – Fullblood Japanese Black, Crossbred Open Wagyu and Commercial Wagyu. Entries were

received from across the country, with 31 in all, the highest number yet received in the competition's eight-year history.

Medals are awarded for Gold, Silver and Bronze based on scoring for tenderness, juiciness, flavour, overall liking and visual. The highest score for each class is awarded the title of Class Champion. The highest score across all three categories is awarded Grand Champion.

The Class Champions are:

- Fullblood Japanese Black:
Stone Axe Pastoral, with Stone Axe
- Open Crossbred Wagyu:
Jack's Creek, Jack's Creek Wagyu X
- Commercial Wagyu:
Pardoo Beef Corporation,
Okan Wagyu



A full list of winners is available from www.wagyu.org.au. ■

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Global Economy Slows in 2019

By Stephanie Flynn

The signs of a global economic slow-down were evident well before the advent of the COVID-19 epidemic with 2019 posting a 2.9% growth, the slowest growth rate since 2009.

In releasing its 'Agricultural Commodities' assessment and outlook in March, the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) noted that both advanced and developing economies had contributed to the slow growth rate.

But, over the long term, global demand for Australian beef and beef prices are expected to remain relatively high through to 2024, compared with the long-term average, driven by population and income growth most notably in Asia.

According to the report one of the major factors which has contributed to slowing growth in Asian nations was the fact that both India and China have been experiencing a decline in growth rates.

China's economic slow-down, which is projected to continue through to 2024, has been attributed to its re-orientation to a service-based economy and its ageing population.

Other emerging and developing nations across the world also declined in growth rates with geo-political tensions, slowing exports and weather-related disasters noted by ABARES as major contributing factors and as factors that are likely to continue through the medium term.

Developed economies, too, have continued their decline in growth, down to 1.6% in 2020, and are expected to continue their decline further over the outlook period to 2024, most notably the U.S. and Japan.

Rates of growth in developed economies have been heavily impacted by trade disputes, weak manufacturing growth and civil unrest.

ABARES foreshadowed the impact of COVID-19 in China would be a major continued threat to the global economy given its economic size and its integration into global supply chains triggering broad economic consequences in a globalised economic system.

Future recovery of the global economy is considered by ABARES to be fragile and notes that it will largely depend on an acceleration of growth in emerging and developing nations.

But, on the positive side, ABARES projects that income growth remains favourable in the longer term in Australia's

top 10 agricultural export markets, including China and South East Asian countries.

ABARES identifies the top 10 markets based on the five years to 2018/2019 financial year and, in addition to China, includes the US, Japan, Indonesia, Korea, New Zealand, India, Hong Kong, Malaysia and Vietnam.

Prospects for continued economic growth in the region are also positive as a result of increasing consumer incomes and urbanisation-related changes in food preferences.

Strong global population growth will continue to drive demand for agricultural imports over the longer term and will benefit Australian exporters, according to ABARES, mainly because the majority of this growth will be in Australia's top 10 markets.

Domestic Economy Slows too

Despite resilience shown in the domestic economy for most of 2019, ABARES noted that signs of a decline in consumer confidence had started to appear by the end of the year with Australian's spending less and saving more in response to low wages growth.

Given private consumption and private investment are major drivers of the domestic economy, the evident decline in consumer confidence and spending and the nation's exposure to international forces continue to be ongoing risks to the Australian economy.

According to ABARES fires and other weather-related disasters are also a risk to the outlook with natural disasters such as the 2019 fire season causing significant economic damage as well as weakened business and consumer confidence.

And, the long-term drought in Australia continues despite recent rainfall which, ABARES notes, has not significantly reduced the impact of long-term rain deficiencies affecting our food production. ■



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ABARES: Value of Beef Exports to Decline

By Stephanie Flynn

Despite significant rainfall in January and February this year having been a boost to pasture growth across northern and eastern Australia, the drought will be ongoing in key regions and will continue to impact the state of the nation's beef herd which is now at its lowest level since the 1989 financial year.

According to the Australian Bureau of Agricultural and Resource Economics (ABARES), the size of the national herd has decreased significantly because of a sustained period of destocking due to the combined effects of prolonged drought and high export demand, most notably from China.

By the end of this financial year the beef cattle herd is forecast to have fallen to 21.1 million head and even further next financial year to 20.8 million head before commencing a slow but sustained recovery to 24.1 million head by 2024/25.

Of concern to the future of the nation's herd is the elevated female slaughter rates which averaged 56 percent in 2019 and reached a record high of 58 percent between March and June last year.

According to ABARES rates above 50 percent indicates destocking and a smaller future breeding herd.

Spurred by the recent rainfall, the nation's farmers have begun restocking their farms which, over the remainder of the financial year, will create a difficult time for processors as they face temporary falls in slaughter rates, production and exports.

ABARES suggests that as a consequence beef production will decrease to 2.0 million tonnes by the end of this financial year with higher than average slaughter weights, as a

Export Volume and Export Values 2000-01 to 2024-25



ABARES predicts Australia's beef export volumes and values to fall over next financial year.

result of improved pasture availability, only partially compensating for reduced turn-off.

But the Bureau of Meteorology forecasts average to below average rainfall in Autumn for key beef regions including far north east of NSW and south east Queensland.

Over the long term through to 2024/25 ABARES expects prices at saleyards to remain historically high due to the combined effects of strong global demand and herd rebuilding which will reduce supply, with the former acting as a constraint on the latter.

ABARES suggests that the strong demand experienced from China over the 2019/20 financial year will diminish as competition increases in the Chinese market and global pork production recovers closing protein gap created by African Swine Fever (ASF) in China and other Asian region nations.

China became Australia's most valuable beef market in the first quarter of this financial year,

accounting for 25 percent of total value compared with the nation's traditional markets 22 percent for Japan, 19 percent for the U.S. and 13 percent for Korea.

The high pork prices, driven by the ASF outbreak in China, have led to consumers substituting other types of meat in their diets including beef.

Since the outbreak of ASF, China has been rapidly approving beef export facilities in key beef producing nation's globally including 25 new facilities in Brazil bringing that nation's approved plants to 89 and 14 additional plants in Ireland bring the total to 21.

As high demand in China has been the main factor driving prices in Australia this financial year, an easing in demand and increased competition in that market are expected to moderate export prices.

Australia's beef export value, in current dollar values, is projected to decline from a record high of \$9,808 million this financial year to \$6,328 million by the end of 2022/23 financial year. ■

Weak economies to undermine global demand for protein

By Stephanie Flynn

As COVID-19 continues its unrelenting attack around the world, Australia's protein industries will continue to see the challenges in demand and trading infrastructure that exporters have experienced over the first quarter of this year with China, the first country to be devastated by the pandemic.

Global agri-business giant, Rabobank, released its initial assessment in April of the likely impact of the COVID-19 pandemic on the global economy and what we can expect on global trading markets as the world continues its shut-down.

According to Tim Hunt, Australian-based head of Rabobank Food and Agribusiness Research, global demand will be significantly impacted by the pandemic.

"While China appears to be in the early stages of recovery, the rest of the world is now ill," Mr Hunt said.

"Global demand will likely weaken significantly in coming months as panic buying for food fades and the negative impacts of reduced incomes across most of the world come to the fore.

"With that, we expect US dollar prices of most ag commodities to fall further in this second quarter of 2020, as supply typically fails to adjust quickly to negative demand shocks resulting in a build-up of inventory," he said.

The Rabobank assessment questions the potential of Government stimulus packages across the world to offset the income effect of COVID-19, describing it as a 'work in progress' which will reduce the demand shock in 2020 but likely to the detriment of the global economy in the longer term.

Significant downside risks include re-infection in China, as a second wave of

infections hit the country from its citizens returning from overseas, and a 'worse than global financial crisis' global economy in 2020.

Chinese imports have been heavily affected by the virus outbreak and resultant lock-down with food service and tourism disrupted, inventory build-ups in importing companies and back-logs in ports.

Rabobank is anticipating that the lockdown in much of world will continue until the end of June which it says will likely push the AUD down, relative to the US dollar, to around 55 cents by the end of the financial year and, just as importantly, the AUD will be lower against most competing agricultural exporters which assists keeping Australian exporters competitive in world markets.

In his guidance on the outlook for beef and sheepmeat, Rabobank's Senior Analyst for Animal Protein, Angus Gidley-Baird said that the restrictions on public gatherings and the wider economic effects will impact the Australian beef industry in different ways.

According to his assessment of the trading environment in recent months, beef exports to China were down 12 percent in February while exports to South Korea, the first country outside China to be affected by COVID-19, were down 5 percent, indicating that beef exports are likely to further decline as the pandemic continues.

"Prices of Australian exports to the US will be one to watch," Mr Gidley-Baird said.

"On the one hand, we expect reduced foodservice demand and increased retail to have a negative impact as larger volumes of Australian beef go into food service.

"However, people trading down to cheaper cuts, such as burgers in quick-service restaurants would favour Australian exports to the US," he said.

Looking at the production sector in Australia, Mr Gidley-Baird said that cattle prices dipped in March, after reaching new records earlier, and are expected to ease further over April.

Australian cattle slaughter numbers declined in March to 20 percent below their long-term average as farmers commenced restocking after early Autumn rains.

"With lower slaughter volumes and Covid-19 affecting global economies, we expect export volumes to remain low in the coming months," Mr Gidley-Baird said.

"Lower oil prices and slower economic conditions are likely to have a large impact on Australian exports of lamb given its premium positioning and its key markets being the Middle-East, the US and China.

"As around 60 percent of Australian lamb imports in the US are consumed in foodservice, we expect Australian lamb exports to the US to come under downward price pressure over the coming months," he said.

In respect of live cattle exports, Mr Gidley-Baird said that while exports to Vietnam continued their strong growth, up 6 percent YTD in February, export numbers to Indonesia were down 21 percent, with numbers out of Townsville Port continuing to exceed numbers out of Darwin Port.

But, according to Mr Hunt the spread of COVID-19 to countries such as Indonesia, Vietnam and other parts of south-east Asia means we will start to see the same set of impacts in a second very large set of export markets for Australia. ■

Austrade support for exporters

By Stephanie Flynn

A range of new support measures for Australian businesses exporting to China and other countries around the world have been introduced by the Federal Government through Austrade which is working with international Governments to provide freight and cargo mechanisms for Australian exporters.

Austrade is also providing regular updates on shipping, logistics and transport infrastructure as well as consumer market intelligence in key global markets for Australian exports.

In April, the Australian Government announced a new \$110 million International Freight Assistance Mechanism to assist the nation's agricultural and fisheries sector to export high-quality produce into prime overseas markets.

The Government also announced an increase in funding of \$49.8 million for the Export Market Development Grant program for the 2019/20 financial year which will allow exporters to get additional reimbursements for the costs incurred in marketing their products around the world.

In its statement last month (April), Austrade provided market intelligence on the state of recovery in China, which has in recent times become the major market for Australian beef exports.

According to Austrade, overall port operations had returned to normal by last month although some backlogs and transport difficulties remained, while restrictions were easing on China's road and rail networks.

Austrade also reported that Chinese companies and local governments have embarked on efforts to drive consumption through several mechanisms.

Of interest to Australian beef and lamb exporters, there are some signs that the food service sector is reawakening with investment advisory company, Fidelity International, estimating that more than half of the restaurants in larger cities were reopened by April.

Fidelity also stated that fast food chains are doing better than high-end venues with most large restaurants recording a daily turnover of 40 to 50 percent below levels before the lockdown.

Austrade reported some distributors of red meat are experiencing a temporary upsurge of meat orders most likely due to concern around food supply in the event of a protracted pandemic.

In its update on the Middle East situation, Austrade said that most Gulf States have introduced population lockdowns but demand for food is high, including Australian food, but supply remains problematic.

Congestion at ports is causing delays and airfreight availability is limited at greatly increased prices.

According to Austrade's individual country analysis, port congestion and high freight charges remain a challenge to food exporters to the United Arab Emirates (UAE).

At present, sea freight from Australia is being delayed as ships take 30 days to arrive in market via Singapore.

Most air freight from Australia to the UAE is now routed via Hong Kong. Etihad Airways in the UAE is operating some charter flights to bring in food from Australia.

While Dubai's Emirates Airline has proposed up to five cargo flights a week to Australia landing in Melbourne for freighting Australian agricultural produce, but Austrade warns that costs of airfreight will likely rise.

Qatar Airways is also looking to follow a similar cargo arrangement to source Australian agricultural produce.

Turkey has ceased meat imports until further notice citing healthy stockpiles but, according to Austrade, meat imports will be considered if market prices increase.

Beef and sheepmeat exporters wishing to access Australia's new International Freight Assistance Mechanism can register their interest with the Department of Agriculture, Water and the Environment on (02) 6272 2444 or by email to assistance@agriculture.gov.au. ■

Butchers compete online in May

MeatStock 2020 and the World Butchers Challenge is no more for this year, leaving butchers without a bit of competition and fun, and a chance to band together as a community.

With the emphasis on fun and staying connected, the Facebook group, Butchers Alliance, are conducting an online butchers challenge to be held at the end of May.

The idea is to process a side of lamb and present your best retail-ready dishes, as you would for a normal butcher competition. There is no time limit, and judging will be based on your display and creativity.

Aimed at the individual butcher, rather than a team, the idea is to upload your images to Facebook, and five judges will determine the winner. In addition, the entry with the most 'likes' will be given the people's choice award. The winning entry will have their display featured as the homepage of the Butchers Alliance group.

Entry is free. Entrants are requested to contact the Butchers Alliance group on Facebook, or for more information, Shannon Walker on (+61) 0424 055 190 ■

Transforming Lowly Cuts to Culinary Gold

PÂTÉ, CONFIT, RILLETTE by Brian Polcyn and Michael Ruhlman

Historically pâté, confit and rillettes were products of frugality. Today the words convey a message of gourmet excellence.

As the authors say: “A beautifully made pâté is a wonder ... yet this simple mixture of meat, salt and spices is also a preparation born of economy and thriftiness, a way to put scraps to use, a method likely thousands of years old.”

This book is a comprehensive 240-page manual on how to make, pâté, confit and rilette a subset of products and processes that are broadly referred to as charcuterie.

- Pâté is essentially ground meat often including liver.
- Confit derives from the word preserve. It typically refers to salting duck or goose and poaching it in its fat. Properly prepared, confit will last for years.
- Rilette is a cross between pâté and confit. The meat is cooked in the style of confit or braised then shredded, enriched with fat and seasoned, put in a mould and served like a pâté.

The first section provides an overview of the meats, salts and spices involved and a detailed description of the tools and equipment needed to produce commercial quantities.

Making pâté is not difficult but it requires planning, discipline and some precision. To quote the authors, “proportion, seasoning, cooking time and temperature are essential ingredients of the recipe.”

Given the recipes have been around for ages, the equipment needed is not complex. Fortunately, modern grinders, cookers and temperature controls allow you to make excellent and consistent products by carefully following the quantitative and procedural elements. The book conveys the message that charcuterie is precision cooking, made easier with modern equipment.

There are detailed instructions and recipes for classic pâté and recipes for traditional chicken, pork, seafood and vegetable pâtés and terrines. There is a short section on mousse, a form of pâté lightened with fats including cream and egg whites. Then a section on foie gras and how to make and add crusts to your pâté range.

The confit process is described in detail with a number of recipes for basic meats such as pork shoulder through to more exotic meats such as turkey and tongue. Rillettes are explained in detail as a way to value-add a confit to make it more like pâté in presentation.

The last chapter has 15 recipes that use left-over bits of meat and offal to make great foods but that do not fall strictly into the categories described previously.

At its most basis charcuterie can be described as: just fat, meat and seasoning – relatively cheap inputs. The

value adding takes place in the preparation.

In the words of the authors, “prepared with modest ordinary ingredients, charcuterie is the art of the miserly cook and a good pâté is determined by the proportion of meat to fat, the proper seasoning and the cooking temperature and process.”

Charcuterie is value adding, where the value is mainly added by the skills of the butcher/chef. The economic calculation is relatively simple. Despite being derived from offal and meat scraps and touched-up with a bit of salt and fat, pâté typically sells for between \$30 and \$100 per kg in 100 to 300 gm packs. This compares with highly marbled Wagyu, where most of the value adding is done at the genetic level and in the feedlot.

PÂTÉ, CONFIT, RILLETTE by Brian Polcyn and Michael Ruhlman (RRP \$62.95) is available from Books for Cooks, 115-121 Victoria St, Melbourne. www.booksforcooks.com.au ■



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When complete, send your copy by mail or email. Include your name, address and phone number to go in the draw for another great prize from **BUNZL**. Results will be published in next issue of Australian Meat News.

Entries close 15 June 2020

Last issues winners and answers, see page 31



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Book Competition Winner

Congratulations to Mal Campbell who correctly answered the question: *What share does Woolies have in the fresh meat market according to Roy Morgan?* Answer 27.5%. Mal and Michelle operate Keith's Pies, in Richmond an inner eastern suburb of Melbourne. The shop is arguably one of the best pies shop in the city, loved for its products and friendly service.

Mal won a copy of: *The MEATEATER – Fish and Game Cookbook* by Steven Rinalla.





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Question: To what amount (in \$) has the government increased the "Instant asset write-off" to, for businesses with an annual turnover of <\$500million? (as reported in this edition of AMN)

Entries close 15 June 2020



Australian MeatNews

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