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Dean
THE SLAUGHTERHOUSE HANG-UP
IN MEAT MARKETING

BY
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A THESIS

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PREFACE

My interest in the meat industry is not a purely academic one, it is a part of my life -- it is my job.

Three years ago a 39-year old man, uprooted his family from California and moved to Omaha in hopes of putting an idea to work. It was a meager beginning that took much time, effort and money but the idea has proved successful.

Coast Packing Company is a specialist within the meat industry, striving for innovation in the processing and marketing of beef variety meats. We have not changed an entire country's way of thinking, but we feel very much a part of the new breed of the meat industry.

It is men like Mickey Kaplan who help carve the future of an industry.
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INTRODUCTION
INTRODUCTION

The purpose of this research paper, The Slaughterhouse Hang-Up of the Meat Industry, is to introduce the reader to the present condition of the meat industry, to highlight its past decade of accomplishments, and to predict some probable and possible changes, strides and trends of the industry.

Primitive packaging, erratic pricing, nonexistent research and development, almost no brand recognition, and profits that average less than one percent combine to make meat marketing a candidate for the marketing failure of the last century.¹ I shall criticize the meat industry where I believe it deserves criticism and I shall praise it where I believe it merits praise.

Professor Max Brunk of Cornell University, and the author of the American Meat Institute's "Brunk Papers" on the meat industry, expounds that "when I go into a supermarket meat department, I see pieces of an animal -- legs, ribs, and livers -- spread

all over the counter. Here in the middle of the twentieth century, they (the meat industry) are still selling anatomy]. Because packers must, as the industry adage goes, sell meat or smell it, all their energies have been consumed by procuring, slaughtering, processing, and shipping meat which has left no time for innovation. Change and innovation are the watch words of American industry, the keys to success. The world has never been witness to such progress as American industry has brought to it. The meat industry would do well by heeding the words of Henry Ward Beecher: "If you are idle you are on the way to ruin, and there are few stopping places upon it].

"The meat industry talks big about what it has to do to build consumer acceptance of frozen or even irradiated (preserved by atomic radiation) meats", says a packaging executive, "but it hardly has taken a first baby step to achieve that]. For the meat industry, the future is out of sight.

\[2\text{Ibid.}\]

\[3\text{Ibid., 37.}\]
PART ONE

A MARKET-ORIENTATED MEAT INDUSTRY?
PART ONE

A MARKET-ORIENTATED MEAT INDUSTRY?

It cannot be denied that Omaha and Nebraska owe much of their growth and prosperity to the once called "Giants" or "Meat Barons" of yesteryear. But Omaha has been witness in the last decade to the death of a lusty era in the meat packing industry. Swift, Armour, Cudahay and Wilson have all passed away in the manner we used to know them. The giants have given way to firms such as Iowa Beef Processors, Inc., American Beef Packers, Inc., and Missouri Beef Packers, Inc., all founded within the past decade.

In 1968, Armour closed its doors to some 1,700 of the company's 2,200 employees. In 1969, Armour's Omaha plant was leveled to the ground and yet remains a graveyard of bricks, steel, lumber and yesterday's dreams -- the testimonial of a dead but not forgotten era of the meat packing industry.

When errors are made and failures result, explanations are demanded. The employees, the stockholders and the members of the meat industry demanded explanations for the collapse of this hardy industry. Such explanations as "the outrageous demands
of the union broke this industry", or "their antiquated buildings were responsible", were offered. I cannot argue that these reasons offered for the collapse of the meat barons hastened its end, but only in a minor way. I propose that the major reason for the "broken barons" was caused from and due to its total lack of a market-orientation.

Not only were the packing houses one-hundred years old, but so also were their methods of marketing. Professor Max Brunk hit the nail on the head -- the meat industry today is still selling anatomy as they did one-hundred years ago. And yet, red meat has continued to be the keystone of the American dinner plate.

Professor Brunk notes:

The prepackaging of meat in supermarkets is about the only significant innovation experienced by your industry since the advent of refrigeration. One might well raise this question. How much longer can your industry afford the material and labor wastage of shipping carcass meat and provisions to individual stores for cutting and packaging? Surely the pre-packaging of meat set the stage for the next step which we now see slowly developing in the form of more processed product, more blockready meat, frozen cuts, and the like. The shortage of butchers may indeed be a blessing in disguise as this labor shortage forces more central cutting. This in turn will be accompanied by more processing and preparation for the dinner table. Fifteen years from
now the retail butcher shop may well be as obsolete as the cracker barrel. 4

If you are idle you are on the road to ruin, and no one explanation could be more valid in describing the collapse of these companies.

Mr. C. B. Weiss was asked by the American Meat Institute in 1967 to prepare a speech to be presented to the AMI, but it was never heard by its members. Mr. Weiss canceled his speaking engagement when the AMI requested that Mr. Weiss "tone down the abrasive references" used in his speech. Mr. Weiss is a Vice-President/Director of special merchandising services of Doyle Dane Bernbach, a New York advertising agency. The AMI further retarded the meat industry's struggle forward by denying its members the very important message that Mr. Weiss had to convey to them. Mr. Weiss's views were not so unlike those of Professor Brunk, just not quite so dressed-up.

The new professional manager knows that the meat industry will continue to have low earnings so long as two-thirds of its tonnage is sold as a commodity that cannot be distinguished in the market place. They know your policy has been emphasis on production

and price -- and that your record or product innovation is dismal. They know you have abandoned prepackaging to the retailer and that you freeze up when central processing and frozen meats are mentioned. Perhaps the most damning indictment of your industry is that companies like Stouffer, Campbell Soup, American Home Products, General Mills and Quaker Oats are marketing branded consumer products which you offer. If you had been marketing-orientated, you might have marketed soft, semi-sweet dog food first.  

The last two decades of American business have been noted not only for their great strides in technology but also for the creative, innovative advances that have been made in marketing. And yet, nothing else presented to the consumer in the supermarket has undergone so little change within the last two decades as meat. Over two-thirds of the industry's tonnage is still sold as "fresh" meats. Meat is still meat.

I have heard many knowledgeable persons express the belief that the meat industry remains one of the last uncultivated frontiers left to the ambitions of modern marketing concepts. I have also heard it said that the meat industry is fifty years behind itself. I cannot argue with these opinions. Mr. Weiss notes further that:

The meat industry is competing with both hands handcuffed. The meat industry would be doing well if its

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major competitors -- the giant food processors -- were only a step or two ahead in marketing sophistication. But the blunt fact is that you do not bat in the same league as your 'real' competition, which consists of the major food processors who are increasing their share of the consumer's food dollar.6

One of Sales Management's editors points to another fact, which seems to have resulted from a stagnant era.

Meat men themselves have become so masochistic that they not only point with pride toward their niggardly profits but take a perverse pleasure in accusing each other and themselves of backwardness and stubbornness.7

Mr. John M. Cowan, presently a consultant to the National Flexible Packaging Association, presented a Modest Proposal for Meat Men in the Sales Management journal in the January, 1968 issue. Briefly, Mr. Cowan's proposal consisted of carrying the meat packers' identity over to the fresh meat counter.8 Without the initiation of this proposal, the meat industry has only two sources of profit; one, they can come from markup on commodity;

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6Ibid.


and two, they can come from advantages the packer can establish in production efficiency. But until the meat industry realizes the value of marketing, they will not extract profits from the third source of profit, which is marketing services rendered. An industry that has regarded marketing as nothing more than a cost will find it most difficult to accept this proposal.

Professor Brunk makes the distinction.

Right here we have the key differences between a production and a market-orientated industry. Marketing to a market-orientated business is nothing more than a continuation of the production process -- a continuation of the production process of adding value to the product from which profits can be derived. In a marketing-orientated industry every individual marketing activity is a source of generating profit.  

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I cannot deny that antiquated facilities and union demands played an important part in the collapse of the meat industry, but they only added fuel to a fire that had been ignited from another cause. When the meat industry was drawing profits from markup on commodity and efficiency gained in production, these two avenues became highly limiting. Meeting union demands cut into profits and when profits are limited by market tolerance, the packers could only go so far before they had to close their doors. And when sales are increasing and profits declining, there is not much left for the building of new facilities.

Union demands and antiquated facilities were merely results of the industry's lack of market-orientation. The Meat Barons, and not the unions nor their facilities, were the cause of their own ruin. A lusty era in the history of the meat industry had come to an end.
PART TWO

SPECIALIZATION WITHIN THE MEAT INDUSTRY:
THE FROZEN FOODS AGE
PART TWO

SPECIALIZATION WITHIN THE MEAT INDUSTRY:

THE FROZEN FOODS AGE

Centuries ago, man once feared temperatures below that which made water solid, now he is using temperature to an advantage in the preservation and presentation of food products to the consumer. However, it was not until the advent of the 1940's that the concept of freezing for the general food industry was initiated by the citrus industry with the canning and freezing of orange juice. Through new and improved methods of freezing and temperature control, the frozen food industry has come into its own in the last decade. Today frozen foods of all varieties are in great demand and competition with the fresh and canned products -- a healthy competition which has brought about better products for the consumer.

Slaughterhouse products, though a latecomer in the frozen food industry, have played a strategic role in the past decade in this growth industry. Although frozen meats and meat products encompass only one area of specialization for the meat industry,
the frozen foods system has been vital to the meat industry’s recovery. An editorial which appeared in Quick Frozen Foods a year ago had this to say about the advantages to be gained by the meat industry in this field:

Here are some of the obvious savings that will come about as a result of conversion to freezing (for the meat industry). Cattle will be slaughtered at the places where they are raised. Automated systems will cut the carcasses up into ready-to-cook products. They will be packaged, frozen and shipped to a distributor, who will distribute them along with all other frozen foods products, possibly as infrequently as once a week. Only the edible weight will be shipped; the skins, bones, fat, and gristle will be processed into other plants near the central unit. Meat cutters will disappear from the supermarkets. 10

The advantages of frozen foods as a system are not to be gained by the processor alone, for the consumer will also prosper greatly from the system.

The government should... encourage the frozen foods industry to grow even faster, because frozen foods are reducing the price of transportation, warehousing, distribution and the final cost of the price of food itself, including the cost of processing. What we are saying is that frozen foods are a system of selling foods. And that the greater the percentage of the food supply of the U.S. that converts to frozen form and uses the frozen distribution system, the lower the price of foods will drop. 11


11 Ibid.
In the preceding paragraphs, only one advantage of the frozen food system has been discussed -- cost. But what other advantages of a frozen food system exist for both the processor and the consumer?

One of the greatest benefits derived from the process of freezing is that a highly perishable product has been transformed into a nonperishable product. The subtle statement of this fact is far reaching. Before the advent of mechanical refrigeration, meat products were transported, distributed and presented on the retailer's shelves in a fresh state. Time was of the essence and spoilage a common occurrence. And where spoilage did not take place, bacterial growth was rapid.

The early history of refrigeration reveals that a patent was granted to Enoch Piper in 1861 for the freezing of fish and to H. Benjamin of England in 1842 for the invention of mechanical refrigeration. But it was not until Clarence Birdseye developed

the quick-freezing process and the equipment necessary for it, that the concept of frozen foods as a system became a reality. And because the meat industry per se, chose to ignore the possibilities of a frozen food system for so many years, other companies like Swanson, Campbell Soup, etc., have reaped the fruits of a new industry. Today, the meat packers realizing the success of frozen foods are scurrying to enter the market.

The Lone Ranger of the Meat Industry:

Spencer Foods, Incorporated

Gerald (Bud) L. Pearson, President of Spencer Foods, Incorporated, since early 1969 reprimands the meat industry:

There has been too much underachieving by the (meat) industry. By our industry I am talking about the independent beef slaughterers that have sprung up in the last ten years. You can analyze them and discover the 'profitless prosperity' that has existed in the last few years. All have had an astronomical growth in sales with a decreasing return on dollar sales. In almost every case, earnings per share have gone down. 13

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But Spencer Foods, Incorporated, under the leadership of Bud Pearson (tagged by the industry as one of the "new breed of packers") is basing their future on frozen convenience foods. Spencer Foods initiated their campaign into the frozen foods arena by conducting a test market of distinctive frozen beef patties at the retail level in four major cities -- Cleveland, Denver, Omaha, and Buffalo. The Spencer Range Patties come in three flavors -- onion, barbecue, and unseasoned and each package contains a packet of Ranger special relish mix. The freezing technique employed by Spencer Foods is the cryogenic process.

Through advanced research and testing of bacterial growth and freezing methods, the cryogenic process of freezing (nitrogen freezing) has opened numerous areas for frozen foods. The technique employed by Spencer Foods is described by Bud Pearson:

The first step is pre-cooling. Meat travels down a belt... during which the temperature of the surface is reduced to an optimum temperature that both sets the color of the meat and puts a crust on the surface which locks in the moisture. This temperature varies from zero to -50°F, depending on the load. Secondly, the meat is prechilled. During this step a colder temperature, about -150°F., is initiated to condition the meat for the ultra-cold blast of liquid nitrogen that will hit the surface of the product in the next

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14 Ibid., 14.
15 Ibid.
step. During the third step the meat is frozen. A blast of -32°F. liquid nitrogen hits the surface, radically lowering the temperature of the meat, particularly the outer shell. 16

The cryogenic method and other methods of "quick freezing" have opened the door to frozen foods, especially to the meat industry. Prior to these new methods conventional freezing was initiated at temperatures between -0°F. and -20°F. The old slow freezing method was effective in the preservation of meat products but gave way to bacterial growth before the product was totally frozen. Another side effect of slow freezing was the rupture of cells, resulting in the loss of juices and coloring. Extensive research enabled by the help of technologically improved refrigeration equipment has proved that quick freezing at or below -40°F. allows only a minimal of bacterial growth and produces a swelling but not rupturing of the cells.

These processes of quick freezing require a large investment in equipment and a high cost of materials and maintenance. Bud Pearson estimates that Spencer Foods' freezing cost alone is one to three cents a pound higher by using the cryogenic method of freezing rather than a conventional mechanical refrigeration

16 Ibid., 17.
system.\textsuperscript{17} This cost factor of freezing raises the question of economic feasibility to both the processor and the consumer. Bud Pearson is highly optimistic.

\ldots When one considers the difference in dehydration, drip loss, operating labor, quality of the finished product, there is no question in my mind that liquid nitrogen freezing is economically feasible.\textsuperscript{18}

And as far as new horizons that may lay ahead for the meat industry with the use of quick freezing, it is Bud Pearson's belief that nitrogen freezing opens the door to substantial importation of Midwest beef by Europe.\textsuperscript{19} Prohibited factors prior to quick freezing have been excess deterioration and shrinkage which is suffered because of the time it takes to transport the beef over water. Many packers and processors have looked deeply at transportation via air, but the cost of this type of transportation has proved to be extremely higher than the costs incurred by nitrogen freezing.

\textsuperscript{17}Ibid.

\textsuperscript{18}Ibid.

\textsuperscript{19}Ibid.
Summary

Spencer Foods has been sold in the many advantages to be gained through the quick freezing of meats which makes these products superior to the fresh meats now presented to the consumer. Spencer Foods is but one example of the many meat processors that have experimented with the idea of frozen meats. Companies of the magnitude of Iowa Beef Processors, Inc., and American Beef Packers, Inc., who are noted mainly as slaughterers have initiated programs of central meat cutting. These cuts of meat are vacuum packed and sealed in cryovac bags and presented at the retail level as frozen cuts.

The concept behind frozen cuts is not new, it is just better.
PART THREE

OBSTACLES AND RESOLUTIONS

FOR THE MEAT INDUSTRY
OBSTACLES AND RESOLUTIONS
FOR THE MEAT INDUSTRY

The "new breed of packers" have posed this question to the industry: Are we in the meat business or the food business? It has taken the industry many years to answer that they are in the food business, but once finding themselves, great strides have been made.

Because the meat industry chose to market their product as a commodity and overlooked the demands which were made upon them, marketing-orientated companies and even chain stores filled the gaps which the meat industry had left. The result is that the industry today faces a long and difficult battle to regain these areas which once belonged to them.

I have made mention in Part Two of central meat cutting programs initiated by some of the independent packers throughout the country. The sad song to be sung here is that central meat cutting was one of the gaps that the meat industry left to be filled by the chain stores. In the last decade many of the national chains have initiated along with their central warehousing and distribution
centers, a central meat cutting program. The chain stores did not move hastily into the central meat cutting programs, but preceded this move only after extensive in-depth research. The points of comparison with the greatest amount of influence were shipping, handling and distribution costs of carcass meat, and the duplication and costs of the in-store butchers and equipment.

The first point of comparison, shipping, handling and distribution costs in the shipping of carcass meat versus the finished product, results in savings inasmuch as only the edible weight is shipped to the stores. The inedible weight consisting of skin, bone, fat, gristle, etc., is bulk shipped to rendering plants for processing. The savings to be realized will depend on the types and cuts of meats that will be shipped. The second point of comparison, the duplication and costs of in-store butchers and equipment, is more obvious in the savings to be realized. The in-store butcher must divide his time between serving the customers and cutting meat, and the time devoted to the customer does not get the meat into the cases. Besides this time lost, the chains have discovered that when the in-store butcher is active in cutting meats, he devotes the greatest amount of his time to the higher priced cuts such as chops, steaks, and so forth. The lower priced meats such as ribs, liver, and stew meats, for example, more
often than not will go unattended. And even though these items are lower priced, the grosses on these products are comparable to the higher priced cuts. Furthermore, packing and packaging equipment must be duplicated. Every store must be provided with the necessary pieces of equipment. Central meat cutting allows the butcher full-time concentration on meat cutting and eliminates the duplication of equipment.

The meat industry not realizing the problems faced by the chain stores at the retail level allowed the chains to get into central meat cutting programs first. The packers are now channeling their efforts toward a market-orientated meat industry. The results are the turnaround by packers such as Spencer Foods, a truly marketing-orientated packer who claims to be in the food business.

What many packers are now doing is taking their plant, cutting it into two distinct operations, thusly separating the species, and sacrificing volume for profits. The packer is not stopping at point of slaughter, but rather he is breaking, boning, fabricating, processing, packaging, freezing, and shipping a finished product of red meat cuts. Many packers are now performing the centralized meat cutting process that chains had initiated in the past. The packers are merchandising their product.
Will we see another turnaround in the next decade of meat processing? Central meat processing initiated by the chains has introduced some of the efficiencies to be gained in the handling and distribution of the product, but will this be good enough for the future? Who will perform this centralized job -- the retailers or the packers? Mr. Weiss stated that:

As long as it is fresh meats that are involved, the retailers will do the packaging for several reasons. But the most economical place to cut and package meats would be in the packing house -- if the meat were frozen. Central cutting and packaging of frozen chicken is now being done by the processor. Frozen meat -- frozen by the packer -- seems inevitable. Prepackaged frozen meats must come and the packer must shoulder this job. 20

Will we witness a decommitment of resources by the chains and a commitment by the packers to central meat cutting? I believe we shall. Grocery chain stores are in the business of mass merchandising of food staples at the retail level, but because of the gap left by the packers, the chain stores got themselves into the meat industry.

Some chains have already begun the process of decommitment of resources and are turning to the packers and the specialists of the industry to provide them with the necessary services and

products. The chain stores are now requesting the packers and specialists to provide them with private label brands of meats and meat products, such as Manor House Brand poultry and meat for Safeway Stores, Incorporated.

The blunt fact of the matter is, that where once the chains could provide their individual stores with meat cuts at a lower price through central meat cutting programs, the packer and specialist of the meat industry can now, in many instances, provide the chains and their stores the same product with better quality and at a lower price. The transition has begun but will take a number of years to become an accepted method of providing the consumer with the highest quality of product at the least cost.

The meat industry is playing a catch-up game, but it possesses the capabilities of regaining its top position not only in the meat industry but also in gaining a high seat in the food business.

Meat people are becoming marketing-orientated. They are merchandising their product from live weight to finished product. Specialists in the industry are growing and prospering. The meat industry is becoming more atune to the problems faced by the chains at the retail level. There are still many obstacles for the meat industry to overcome in the future in their struggle to become a marketing-orientated industry. They have taken the first step,
called by one observer as only a baby step, but this step has
proven to be in the right direction. Meat men are beginning to
pose such questions as this one asked of Professor Brunk at the
Annual Meeting of the American Meat Institute in Chicago, 1969:

Question: Where can a packer find a good product develop­
ment man or how else can a packer get out of
the commodity and into the product business?

While 'people resources' are the basic material out of
which business is built, managements which raise such
questions seldom find the solution. Product develop­
ment is not an individual responsibility -- it is a com­
pany responsibility. The capacity of a company to
differentiate its products, to innovate, to maintain a
flow of successful, new products into the market
place is far more the result of a management philosophy
than the presence or absence of individual people. Good
product development men are to be found in almost any
company but there are few companies which have found
the secret of establishing an environment in which such
men can work successfully. The development of a good
idea is relatively simple but the translation of the idea
into success requires the full and concerted effort of
everyone in the company. In the final analysis it's
not so much the idea that's important but rather the
execution of it. 21

Meat men are rechanneling their efforts away from production,
volume, commodity, and tonnage concerns and concentrating on
product innovation and on marketing. Professor Brunk replies

21Dr. Max E. Brunk, "The Retailer and You". (Talk before
the Annual Meeting of the American Meat Institute, Chicago,
to the second part of the question:

We have spent much time together over the past few years trying to answer the latter part of the question. Not being overwhelmed with apparent success I shall conclude my answer, and this talk this way:

If you are one of those packers who earn a little money, who have several profitable but many unprofitable products in your line; if your worries are about physical problems of efficiency rather than about pricing, quality, packaging, and advertising, if you are more content to copy the ideas of your competitors than to fight the battle of carrying through a new idea, then you might well be advised to consider the merits of selling your business and using what equity you might have remaining to go into the retail food business. Your attributes will be more at home. 22

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22 Ibid.
PART FOUR

THE FUTURE OF MEAT MARKETING
As American industry comes to recognize the profit generating potentials that marketing in itself has to offer, the corporate executive will become deeply involved in 'marketing management.' This brings me to the point: to sell means 'to get rid of,' to market means 'to create utility.' In planning the firm's marketing future, management must make the decision whether profits are to be sought primarily in production or in a finely-balanced program of production and marketing. If you chose to be production orientated, then marketing is merely an instrument for selling meat, for selling a commodity. If on the other hand, firm objectives point to profit in marketing, the whole nature of the business changes to that of discovering, producing and selling marketing services.  

Meat packers today are no longer members of just the meat industry, for they have joined the ranks of the broader field of the food industry. Meat men are making changes. They are directing their businesses toward a market-orientation. Not only have they left behind the old ways, they are making some of the new ways. Meat men no longer take a sadistic pride in their

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23Dr. Max E. Brunk, "Management's Responsibility for Marketing" (talk given before the Executive Management Conference of the American Meat Institute, Monterey, California, March 29, 1965), pp. 16-22.
stubbornness to resist change, but have become change agents in one of the world's largest industries -- the food industry.

The question is no longer what is the future of the meat industry, but rather what will be the future of meat marketing? One of the most exciting avenues that the meat packers have taken is the presentation of frozen red meat cuts as illustrated by Spencer Foods in Part II. Spencer Foods are not alone in their endeavor. Iowa Beef Processors, Inc., one of the new breed of the 60's sees frozen red meats in this light:

We see the beef industry as an emerging growth opportunity through creative new marketing and merchandising programs. Iowa Beef is dedicated to the task of making rational the process of providing our nation with quality beef products. The advancement of our innovative ideas in providing prefabricated beef cuts to the supermarket and feed service industries represents a challenge unequalled in the meat industry.24

A challenge unequalled in the meat industry -- will the packers be able to meet the challenge? Meat men today are already meeting the challenge head on and it is my belief that they will greatly surpass it. As in the case of frozen red meat cuts, industry indicators point to a 50% conversion from "fresh" meat cuts to

frozen by 1980. Spencer Foods is but the example of one packer experimenting with this conversion, but what about the other end of the meat marketing spectrum. A Jewel Tea Company Food Store in Melrose Park, Illinois, believes that "we are just a little ahead of our time" in 1971, "however, we still feel frozen red meats are not far off. Many shoppers resisted buying meat frozen, although others have written to ask for the items since the line was withdrawn." 25

Change does not take place over night and yet the meat industry has initiated a considerable amount of change in food processing in the past decade. The meat industry has assumed a marketing atmosphere, something that was totally lacking fifteen years ago.

It is true, as Professor Brunk has pointed out:

In a generation of marketing change, the meat industry has done little more than initiate prepackaging and decentralize its processing with more efficient plants. The former has abandoned to the retailer and the latter was a forced yield to the pressures of price. Far too many meat firms cling to the belief that marketing is little more than salesmanship, advertising and pricing -- a belief as outmoded as the roll top desk. Today marketing offers as much opportunity for profit as does production but you will never see that opportunity nor reap the reward it offers until you recognize marketing for what it is. 26


Professor Brunk gave his talk to the American Meat Institute
seven years ago. What was its impact? The meat industry has
recognized the vast opportunities that lay waiting them in marketing
and have risen up to meet the challenge. Every industry should
be so lucky to have a "Professor Brunk", for it is men like the
professor who help an industry come of age.
Summary

In the Introduction I said that I would criticize the meat industry where I believed it deserved criticism. I have pointed out a multitude of sins I believe the industry is guilty of committing, and yet, I cannot praise the men of the industry enough for their hard-fought comeback. "If you are idle, you are on the way to ruin, and there are few stopping places upon it." Henry Ward Beecher's words are displayed throughout the industry's past. The meat industry became stagnant and idle, but it also learned a great deal about itself during its near collapse. For the meat industry, the future can be out of sight.
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