

**PRIVATE LABEL
SUPPLIERS OF BEEF &
PORK PRODUCTS**

FINAL REPORT

Prepared for:

Saskatchewan Agriculture Food and Rural Revitalization

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The Private Label Market - Suppliers of Pork and Beef Products - PLMA 2002-

1.0) INTRODUCTION

The annual PLMA (Private Label Manufacturers' Association) show is the largest marketplace for retailers sourcing private label products. Hosted in Chicago, November 17 – 19th the show attracts buyers and executives from America's largest supermarkets and drug and mass merchandise chains. This year the show featured 2146 exhibitor stands (Food – 1030, Non-food 1019, International Pavilions 970), and hosted approximately 5000 visitors.

The following categories were represented at PLMA:

- Food
 - a. Perishables
 - b. Shelf Stable Products
 - c. Sauces and Spreads
 - d. Organic Health and Dietetic
 - e. Oils, Dressings & Seasonings
 - f. Beverages
 - g. Confectionary and Snacks.

- Health and Beauty Products
- Household Products

During PLMA 2002 research was conducted by Saskatchewan Agriculture, Food and Rural Revitalization on the existing suppliers of beef and pork products to the private label market. The objective of this research was to identify key suppliers of beef and pork products to the private label market, detail the type products being supplied and determine whether there are any opportunities that may be suitable for Saskatchewan industry to target.

Every effort was made to interview each of the 31 exhibitors identified in this report. Due to the highly competitive nature of this industry, a large percentage of companies refused to share any details regarding their company, products (sourcing) and private label clients. They were very quick to qualify the researcher as a non-buyer, and would entertain minimal questions, if any. Furthermore, the majority of food companies exhibiting at the show did not have corporate literature readily available. As such, many of the profiles included in this report were supplemented by information contained on the company's website.

1.1 New Product Expo

Since its inception 5 years ago, PLMA's New Product Expo has become indispensable for tradeshow attendees. It is the place to see the latest products and packaging that are being promoted at the show for the very first time by exhibitors. The showcase featured a number of products including the following:

Meat Products

- Marinated Pork Souvlaki (oven-ready, uncooked), 600g by Expresco Foods of Montreal, Quebec.
- Marinated Skewered Entrees (Beef, Pork and Chicken) "Seasoned and Fully Cooked", also by Expresco Foods of Montreal. The product can be cooked within 5 minutes on a barbeque or in the oven. The entrees come in a variety of portion sizes ranging from 3, 3.5, 4, 5 or 6 oz.
- Toasted Meat Breaded Ravioli (Frozen) – 14.5oz by Windsor Frozen Foods of Houston, Texas.

Other food products featured included:

Snacks

- Double Baked Pretzel Balls by Shultz Pretzel of Hanover, PA

Organic Food

- Organic Canola Oil by Sunora Foods, Calgary, AB
- Organic Bagels – Fleischer's Bagels, Macedon, NY
- Organic Soups in 473ml tetra paks by Pacific Foods of Oregon, Tualatin, OR. New flavours include: Creamy 3 Potatoe (with all-natural garlic, cumin, onion, and a hint of curry), Creamy Corn Chowder (sweet corn with roasted poblano chilis and cumin), Natural Beef Broth, and French Onion. Other flavours include Cream of Tomatoe, and Cream of Mushroom.
- Organic Cereal (Honey Crunches of Oats, Honey Nut Toasted Oats, Wheat Squares) by Weetabix Company, Clinton, MA

Desserts

- Sugar Free Chocolate Mousse Cake (boxed) by Sublime Desserts, Saint-Laurent, Quebec.

Beverages

- Imported Russia Vodka, JSC "Ussuriisky Balsam", Orlando, FL

Sauces & Spreads

- Gourmet Dipping Sauces by Mad Will's Food Company, Auburn, CA

Vegetable/Potatoe Products

- Frozen Seasoned Potatoes (boxed). Available in chunks and wedges. Flavours included garlic & parmesan, rosemary and garlic, chipotle campfire and glazed roasted sweet potatoes by Norsun Food Group, West Chester, OH

2.0) PRIVATE LABEL – MARKET OVERVIEW

2.1 What is Private Label?

Private label is a term used to describe the increasingly popular practice of creating a product line which is exclusively developed, manufactured and produced for a retailer.¹ That label can contain the store's own name (Safeway Select) or a name created exclusively by that store (President's Choice).²

Consumer acceptance of private label products has never been higher. Private label products (or store brands) account for one of every five items sold every day in U.S. supermarkets, drug chains and mass merchandisers. In 2001, private label sales were valued at approximately \$50 billion (US), and they continue to grow.

It is interesting to note that Canadians tend to be more receptive to private label products than U.S. consumers. (Private label accounts for a 25.1% share of supermarket dollars in Canada and only 16.2% in the US). This figure indicates the importance Canadian consumers place on receiving good value for their dollar.

Store brands are often comparable in quality and nutrition to their national brand counterparts, with the major difference for consumers being the notable cost savings (10 – 30% less than national brand varieties).³ This cost saving can be realized because private label products are not as heavily marketed as national brand products.

According to PLMA President Brian Sharoff, "Over the past decade retailers first expanded their private label programs to include premium private label and later perishables." Now wines and spirits, gourmet lines, and housewares (on the non-food side), are the areas attracting significant attention.

¹ QRS, "Unlock the Potential of Private Label: Building Loyalty with a Private Label"

² www.plma.com/storebrands/sbt02.html, "Store Brands Today"

³ www.ralcorp.com/thestorebrandstory.htm

2.2 Fastest Growing Private Label Categories

According to Chicago-based Information Resources, Inc. for the 52 weeks ending September 8, 2002 certain private label products experienced significant growth across individual and combined food/drug/mass merchandiser channels. The following chart details the categories that achieved high rates of growth across all channels. (This information does not include Wal-Mart, which has also gone into the private label business.)

Product	Dollar Sales	% Change vs. Year Ago
Frozen appetizers/snack rolls	\$38.8 million	66.4%
Frozen seafood products	\$522.5 million	63.7%
Miscellaneous snacks	\$11.4 million	55.5%
Non-fruit shelf stable drinks	\$8.4 million	52.1%
Salad toppings	\$7.9 million	50.5%
Oriental food category	\$13.7 million	28.8%

2.3 Trends

The trends for the private label market parallel the trends being seen across the conventional food market.

- **Dinner Solutions Boom** – The 46-category dinner solutions grouping has experienced a 10.8% growth rate over last year according to Information Resources, Inc. Products in this category include: frozen and shelf-stable bowl dinners, frozen skillet dinners, refrigerated diced but uncooked meats, frozen & refrigerated appetizers/snack rolls, frozen prepared meats, refrigerated salad kits, frozen hand-held entrees, frozen and refrigerated dinner sausage, frozen poultry, frozen pizza, shelf-stable dinners, and frozen and refrigerated dinners and entrees.

- **Convenience** – is emerging as the fastest way to get a consumers attention. “New conveniences may be the real differentiator,” states Information Resources, Inc. “Meal kits...some containing cooking and serving containers – like bowls, others effectively completing time-consuming preparation steps – buying, peeling, chopping, cutting, marinating, etc. are particularly successful”.⁴

- **Great Taste** – A good tasting product is “a basic cost of entry” for new product success. “Distinctive flavors, textures and recipes are critical to

⁴ www.plma.com/scanner/scanner.asp

success.”⁵ It is also important to ensure your product includes a variety of flavors and/or choices for the consumer.

2.4 The Competitive Environment⁶

Any Saskatchewan company interested in penetrating the private label market needs to be aware of two competitive factors.

Local Capabilities

Currently, domestic manufacturers supply more than 90% of private label foods found in the U.S. market. It is estimated that there are more than 1000 manufacturers that specialize in producing private-label food products in the United States.

International Competition

As the U.S. private label market has grown, international competition has also increased significantly, with the greatest competition coming from Europe. Countries such as the United Kingdom, France and Germany have all highly developed private-label programs in place and therefore manufacturers have a great deal of experience and expertise in the private label market. However, our advantages in geographic proximity and tariff rates should allow Canadian companies to be competitive in this market.

Canadian Position

Canadian companies have been very successful in positioning themselves in the U.S. market. This has resulted in Canada developing a solid reputation as an exceptional source for high-end private-label foods, both in terms of taste and packaging. Many top U.S. retailers such as Wegmans Food Markets, Giant Eagle and Kroger Company have actually visited Canadian tradeshows in search of potential suppliers. As the U.S. market is renowned for moving large volumes of private label products at a low cost, experience and expertise is essential.

Canadian companies such as Loblaws Supermarkets, with their President’s Choice brand have been highly successful not only in Canada, but within the U.S. market. Private label category penetration is the most critical pillar of their business and accounts for approximately 30 – 35% of their sales in Canada. The company recently introduced a line of organic products called “President’s Choice Organics”, which identifies and supports the new and evolving consumer lifestyle. Thus far their organic baby food line is experiencing enormous success, while their orange juice

⁵ Ibid.

⁶ www.atn-riac.agr.ca/info/us/e3207.htm

is experiencing sales levels equivalent or better than the major national brand.

The forecast growth of the private label market holds potential for Canadian companies, especially those that offer new or innovative products that can be used by retailers to expand their product lines.

3.0) THE RETAILER

The consolidation of retailers in the past couple of years has been one of the most influential factors shaping the growth of the private label market. Large retailers now have more resources to allocate to a private label program, and as the environment becomes increasingly more competitive, retail grocers are working harder than ever to distinguish their operation from the competition. As they attempt to grow their businesses, they are looking at private label products to offer an exclusivity element to their product assortments.⁷ Retailers are finding that private label is a great way to differentiate their store – their brand – from other competing stores because it is something the consumer can only get there. Retailers are developing private label not to simply differentiate on price, but to offer a variety of quality features. It can be packaging or performance promises, or an indulgent product that offers some kind of feature and benefit the retailer believes is unique from the branded products available.⁸

Retailers are working very hard to determine the right balance of private label and branded products necessary within their operation to ensure their customers keep coming back. A leading manufacturer of private label packaged goods stated “Private label prospers when there is a good brand leader in the category, because it brings in more consumers to the category”.⁹

The Potential Rewards to a Retailer of a Private Label Program

A private label program provides retailers with a number of rewards:

- **It creates more interest in and dependence on the retailer by the customer.** By offering products that aren’t available at the competition, a retailer creates a sense of variation and choice that can attract and keep customers.
- **It generates customer loyalty and minimizes product and retailer comparisons.** By offering unique products, a retailer can avoid price comparisons and earn customer loyalty.
- **It provides the retailer with more freedom on pricing strategies.** Creative pricing strategies and strategic assortment management can truly take place if goods are under the retailer’s

⁷ QRS, “Unlock the Potential of Private Label, Building Loyalty with a Private Label Products”.

⁸ Turcsik, Richard: “More in Store”, Progressive Grocer, November 1, 2002.

⁹ Ibid.

price control. In branded scenarios, most prices are standard and have no flexibility, even at the point that goods are marked down.

- **It develops supplier relationships that are able to adapt quickly to new concepts and create products specific to the retailers' specifications.** Many times, suppliers are quite open, willing and able to produce new lines tailored to the retailer's target clientele – which generally produces a tremendous cost savings to both the retailer's gross margin and the customer's wallet.
- **It offers significantly increased margins.** Improved gross margin is a clear benefit of a successful private label program.

3.1 Sourcing of Private Label – Internet “Reverse Auctions”

Sourcing for private label products is becoming more pronounced on the Internet through “reverse auctions”. Internet “reverse auctions”, where a retailer will establish a bid and manufacturers vie to match it, have opened a Pandora's Box. “It's a very sensitive issue,” says Brian Sharoff, President of the Private Label Manufacturers' Association. “The retailers are looking for ways to reduce the cost and goods and have found an answer they like in the notion of going to auction. Manufacturers see it as a way to beat down the price, which it is, and that sometimes the winner of the auction is a company that may not in fact be able to make the goods at the price they bid and perhaps not at the service level that they promised”.¹⁰ As industry moves closer to this system in private label the “relationship” factor between the manufacturer and retailer will become less pronounced.

Internet “reverse auctions” were part of a panel discussion at PLMA 2002, with some of the key issues of the exchange being detailed in the table below:

**“Reverse Auctions”
Key Issues**

THE GOOD	THE BAD	THE UGLY
Market visibility	Phoney savings	Low bid does not always win
Level playing field	Post bid negotiations	No quantity guarantee
Efficient	Unqualified bidders	
One time savings	No quality credit	
	No product difference	

Even though there currently a number of issues with “reverse auctions”, there are a number of benefits to manufacturers:

¹⁰ Ibid.

- It provides suppliers with an opportunity to secure new business, which in the past may not have been possible due to a strong existing relationship between the supplier and retailer;
- It is a good way for manufacturers to utilize excess plant capacity; and
- Reverse auctions compress the time required for negotiation.

This is a relatively new system and as such will experience growing pains. Retailers stressed that one of the key issues that needed to be addressed immediately was the establishment of a pre-qualification feature to ensure that suppliers that were submitting bids were actually capable of fulfilling the contract should their bid be selected.

4.0) THE PRIVATE LABEL MANUFACTURER (Supplier)

Who Makes Private Label Products?

Manufacturers of private label products fall into the following four classifications:¹¹

- Large national brand manufacturers that utilize their expertise and excess plant capacity to supply private label products.
- Small, quality manufacturers who specialize in particular product line and concentrate on producing store brands almost exclusively. Often these companies are owned by corporations that also produce national brands.
- Major retailers and wholesalers that own their own manufacturing facilities and provide store brand products for themselves.
- Regional brand manufacturers that produce private label products for specific markets.

Advantages to the Manufacturer:¹²

- You can get into the market at a lower cost, relative to launching your own product.
- You have a secondary product providing your company with a new profile.
- It is an opportunity for smaller suppliers who don't have the promotional capabilities to enter a bigger marketplace.
- The supplier can secure more shelf space within the store.
- Provides an opportunity to build strategic partnerships with selected retailers.

Disadvantages to the Manufacturer:

- The relationship with the retailer could be threatened if the product doesn't perform.
- You may have created a competitor for your own brand.

¹¹ www.plma.com/storebrands/sbt02.html

¹² www.retailindustry.about.com/library/us/02/uc_stanley3.htm

- Other suppliers may introduce cheaper private labels and drive margins downward.
- High inventory costs and low profit margins.

Prior to entering the private label market manufacturers must conduct significant research to ascertain whether the private label market is well suited to their existing corporate strategy. Even if a company’s product has initially been accepted by a retailer, the manufacturer still runs the risk that the retailer may at some point drop the contract in favor of a better offer from a competitor. Even though many manufacturers solely focus on the private label market, other companies adopt a diversified approach that targets further market segments such as a line of branded products for the conventional retail market and/or foodservice.

5.0) SUPPLIERS OF PRIVATE LABEL BEEF AND PORK PRODUCTS AT PLMA

At PLMA there were 31 companies representing various products containing beef or pork. The products fell into the following categories: perishables (14 companies), prepared entrees (8), canned meats (5), ready-to-eat foods (2), and snacks (2). Refer to Appendix A for further information on the above suppliers. **Please note that this list is not inclusive of all the manufacturers supplying meat products to the private label market.**

Even though the number of companies exhibiting at the show was small, discussions with exhibitors revealed that there are indeed a number of players providing private label meat products to retailers. Supplier strategies differ with some players focusing solely on the private label market, whereas for others, private label business is an extension of their product line.

The chart below looks at supermarket sales for various private label products containing meat. In the past year the areas that have experienced the greatest growth include refrigerated meat and poultry, dinner sausage, frozen appetizers/snack rolls, ethnic foods (Oriental and Mexican) and frozen dinners/entrees.

Private Label Performance Supermarket Sales

Private Label Product Category	Dollar Sales	% change vs. Yr. Ago
Breakfast Meats	422,571,008	3.6
Dinner Sausage	110,558,736	19.4
Canned Meat	48,777,044	10.7
Frankfurters	104,762,072	(0.7)
Frozen Appetizers/Snack Rolls	38,537,980	65.9

Frozen Dinners/Entrees	144,589,488	15.7
Frozen Meat	129,953,288	14.2
Frozen Pot Pies	22,655,260	3.7
Luncheon Meats	478,282,784	9.0
Meat Pies	3,025,660	(8.1)
Oriental Food	13,623,777	28.6
Mexican Foods	78,834,376	19.7
Pizza (Frozen)	154,924,944	1.4
Pizza (Refrigerated)	12,732,191	(30.2)
Entrees (Refrigerated)	168,425,424	1.3
Meat/Poultry (Refrigerated)	197,257,168	68.1
Single Serve Dinners	112,167,864	2.0

Source: Information Resources, Inc. Total supermarket sales for the 52 weeks ending Sept. 8, 2002. Categories with sales less than \$1 million not listed.

5.1 Opportunities

Innovation is being sought to grow the private label category and retailers are looking for products that are unique and provide convenience to consumers. The meat business is highly competitive and companies are working very hard to establish their niche. One company stated that they believed that opportunities existed in private label pork sausage products.

A major US supplier of beef jerky advised they were looking for a Canadian company to manufacture beef sticks. (The company's Vice President of International Sales was formerly from Regina.) The sales lead was forwarded on to a couple of Saskatchewan companies.

Retailers are also looking for new ideas – “things aimed at children, organics.”¹³

5.2 Meat

Discussions with suppliers yielded conflicting information on nature of the private label meat business. Some of the comments collected at the show included the following:

- Meat is a high volume business and you need to be “big” to succeed (500+) employees.
- “Meat is not huge [in private label] because it is very capital intensive, not to mention all the regulations that must be met (HACCP, CFIA) etc”. It appears that a large percentage of the private label meat business (at least refrigerated/frozen meat) is being served by large well established players who already have their own brand of products (i.e. Hormel, Tyson etc.) However, this

¹³ Ibid.

is not to say that opportunities do not exist for smaller niche players, especially in the development of value-added products.

- “Smaller companies can succeed in the private label business, but they need to pick a niche and focus on it. Don’t try to be all things to all people.”
- Meat is considered a commodity and retailers aren’t interested in private label meat products. “Unless your product is really unique (organic/natural) it is difficult to brand”.
- Many retailers currently have a private label or branded meat programs in place. “Even though there weren’t many meat companies and/or products represented at this show, there are a number of companies producing private label meat products.”

Even though suppliers had conflicting opinions regarding the opportunities for private label meats, the researcher is confident that companies can succeed in this market if they have a unique product and are niche oriented.

5.3 Issues

Discussions with suppliers raised a number of key issues that need to be met in order to succeed in the private label business.

- **Quality Counts** – Quality becomes even more critical for a private label than a national brand because the retailer’s reputation is at stake. If the customer has a bad experience with a national brand product, he may return it to the store for a refund but won’t hold the retailer responsible for the quality of the product. A store-brand product, though, carries the reputation of the retailer on every package.¹⁴ Quality rated as the most important success factor for most companies, however, they stated that quality must be consistent or the retailer will find a new supplier. One company said one of its major advantages is the traceability of all its meat products - from source right to the market.
- **Competitive Pricing** - Retailers demand quality products, but at a competitive price. Next to quality, pricing was the second most important factor identified by suppliers. The retail environment has become brutally competitive and retailers must be profitable to survive. A major supplier of luncheon meats summed up the importance of pricing, “the retailer is most interested in the profit margin your product can provide their operation”.

¹⁴ QRS, “Unlock the Potential of Private Label, Building Loyalty with a Private Label”

- **Supply capability** – Consolidation has resulted in retailers becoming larger than ever. Larger retailers will increasingly require “strong manufacturers with the resources available to support large-scale, private label products”¹⁵. Supply capability will be an issue, especially it targeting larger US-based retailers. One company indicated that an initial order from Wal-Mart can be valued at \$3.5M, and stated that his company (which provides private label pizzas) just received an order from Meijer for 1200 pallets to be delivered in two weeks.

Companies must have an in-depth understanding of their production capabilities prior to approaching a retailer. This is especially true for fresh/frozen meat products (which tend to be higher volume items). Suppliers of fresh or frozen meat products also need to be aware of the effect that “Country-of-Origin” Labelling and the Food Safety and Bio-terrorism Act may have on their ability to penetrate the U.S.

- **Customer Service** - Companies must be prepared for a lot of hard work and perseverance if they want to succeed. Retailers expect products to be labelled properly, delivered on-time, and in the quantity originally agreed upon.
- **Retailer Support**- Most retailers don’t charge slotting fees for private label products, however, whatever promotional support you can offer will give you an edge. Some manufacturers offer retailers the expertise of culinary chefs to aid in designing customized private label products. Retailers are also beginning to demand more from their private label suppliers in terms of planning, merchandising, category management, and forecasting.

5.4 Brokers

A new company entering the private label market may prefer to use a broker to sell their products and service their accounts. Brokers don’t take title or possession of the “goods”, but rather act as an “outside” sales staff.

Many brokers have established solid relationships with retailers and wholesalers and meet with their buyers regularly. As a result, they can be very valuable in helping new companies penetrate the private label market.

¹⁵ Agri-food Trade Service, “The U.S. Market for Private-Label Foods”, July 2001.

Some of the advantages of using a broker's services include:¹⁶

- Comparatively low start-up and overhead costs (no sales, no costs);
- Quick access to an established network of buying contacts;
- A local presence to service clients; and
- The broker is knowledgeable on the market and the promotional requirements required for the product.

Many of the companies interviewed at PLMA utilized brokers, in combination with their own direct sales force. Direct sales were preferred by suppliers, however they advised that many retailers demand that their suppliers work through a pre-identified broker. Conversely, some retailers are amenable to working directly with their suppliers. Therefore companies will need to be flexible in how they approach the private label market.

The two largest "private-label brokers" are Daymon Associates and TOPCO Associates Cooperative. These companies actually have representatives which operate out of the headquarter offices of all major chains and independent wholesalers. They are typically under contract to these organizations to manage a large number of private label and non-private label goods.¹⁷

Daymon Associates Inc.

700 Fairfield Ave., Suite 2
Stamford, CT
6902-7526
Tel: (203)352-7500
www.daymon.com

TOPCO Associates Cooperative

7711 Gross Point Road
Skokie, IL
60077-2615
Tel: (847)676-3030
www.topcoess.com

More information about food brokers can be secured from the report entitled, "Working with a U.S. Food Broker: A Guide for Canadian Exporters". This report can be accessed from InfoExport at:
<http://www.infoexport.gc.ca/docs/view-e.asp?did=5191&gid=229>

Manufacturers targeting the private label market should note that the retailer decision to pursue a private label strategy takes place only after a category review. This is the process whereby retailers will periodically assess market demand and their own corporate strategy to determine which products and respective suppliers are needed to fulfill their strategy.

Category reviews can appear arbitrary, and often do not take place at a designated time, but rather at the discretion of the retailer. Retailers primarily review their private label categories for two reasons: to assess

¹⁶ Ibid

¹⁷ Ibid

product performance and in the event that problems arise with an existing supplier. Most often it is the retailer that seeks out private label alternatives.

There are two things that suppliers can do to keep their products under consideration by the retailers they are targeting:¹⁸

- Ensure that retailers have been provided with up-to-date promotional literature on your product.
- Become familiar with the private label broker and the personnel in the retail chain who manage the private label decisions for the retailer. (This is often accomplished best by participating in private label tradeshow).

RELEVANT CONTACT INFORMATION

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www.plma.com

For more information on this report please contact Renata Bereziuk, at 306-787-8541 or by email at rbereziuk@agr.gov.sk.ca.

¹⁸ Agri-food Trade Service, “Approaches to Markets in Upstate New York and Western Pennsylvania”, <http://atn-riac.agr.ca/info/us/e3351.htm>

APPENDIX A

SUPPLIERS OF PRIVATE LABEL PRODUCTS CONTAINING BEEF OR PORK





Overview of Exhibitors at PLMA 2002 with Products Containing Beef or Pork

Company	Address	Phone	Fax	Product	Other
CANNED MEATS Castleberry/Snow's Brands, Inc. (www.castleberry.com)	1621 15th St., Agusta, GA 30901	706-733-7765	706-736-5061	Beef stew, chili w/beans, plain chili, hot dog chili sauce, corn beef hash	Company is an established co-pack and private label producer. Mfg. & warehousing facility is 430,000 sq. feet.
Hoopeston Foods	Two Appletree Square, Ste. 242, Bloomington, MN 55425	952-854-0903	952-854-6874	Canned pork & beans, sloppy joe sauce, canned chili, stew, corned beef hash.	A manufacturer and contract packer of private label canned goods.
Hormel Foods Corp. (www.hormel-spd.com)	1 Hormel Place, Austin, MN 55912- 3680	507-437-5603	507-437-5120	Bacon (bits, flakes, diced Canadian bacon, bacon topping), Beef (dried- slicing type, beef chunks/crumbles, frozen beef fajitas), Diced and ground ham, pepperoni, Pork - (chunks/crumble, pork sausage crumble)	Have a private label dessert program. Hormel is the leader in private label desserts.
Vietti Foods Company Inc. (www.viettifoodsinc.com)	636 Southgate Ave., Nashville, TN 37203	615-244-7864	615-242-7055	Regional chili, beef stew, brunswick stew	Canned products.

Zwanenberg Food Group (USA) Inc. (www.zwanfood.com)	10 Madison Ave., Morristown, NJ 07960	973-455-8000	973-455-1472	Canned cooked ham (455 grams), chunked (flaked) ham and beef products including corned beef (340grams), canned roast beef with gravy.	Importer. Other products include canned fish, fruit, fruit preserves and jams. All of their pork products are imported from their parent company in Holland called Zwanenberg Food Group BV, one of the EU's largest exporters of preserved meats including ham, luncheon meat, bacon, sausages and bouillon. ZFG has modern HACCP, EU and USDA approved facilities in the Netherlands producing 60,000 M/tonnes of canned and deli meats and dried sausages annually. Their beef products are imported from a variety of producers in South America.
PERISHABLES					
American Foods Group (www.americanfoodsgroup.com)	544 Acme St., Green Bay, WI 54308	920-436-4249	920-436-4248	Processed hams, smoked bacon, retail ready boneless beef roasts, breakfast sausage.	Facilities for beef are vertically integrated (slaughter to packaging). For pork, they purchase the cuts that they need to service the private label market. Also service the foodservice market. This company sees significant opportunities for meat in private label. Stated that many companies use a strategy consisting of 50% brand business and 50% private label. PL for Kroger.
Birchwood Foods (www.bwfoods.com)	Box 639, Kenosha, WI 53141	262-859-2272	262-859-2414	Variety of ground beef patties packaged in re-closable bags and boxes.	

Carl Buddig/Old Wisconsin Food Products (www.buddig.com)	950 W. 175th St. Homewood, IL 60430	800-621-0868	708-798-0900	Thin sliced traditional and premium thin sliced meats (ie. Beef, Corned Beef, Ham, Honey ham), summer sausage, beef sticks and other meat snacks.	Have both private label and branded meat products. Product line also includes a number of "lean", "low fat" options. Packaging comes in various sizes to accommodate different needs. (i.e. 1 lb. Value pack, and smaller). PL for Loblaws.
Expresco Foods (www.exprescofoods.com)	8593 Delmeade, Montreal, QU H4T 1M1	800-205-4433	514-344-9443	Marinated portion control beef and pork skewered items. (Kabobs, skewers, satays [available in beef, pork, chicken, lamb])	Have a co-packing agreement with Jane's. Flavours for skewered items include Greek and honey and garlic. Two of their products were featured in the new products showcase. Products come in a variety of portion sizes including: 3, 3.5, 4, 5, 6 oz. Some of the products are partially cooked, only needing to be grilled for 5 minutes prior to serving. PL for Loblaws. Stated SME's must be focused (target niche markets) to succeed in the private label market. Recommended that SME's pick "good" partners.
King's Command (www.kingscommand.com)	7622 S., 188th, Kent, WA 98032	425-251-6788	425-251-0523	Fully cooked meatballs, burgers, meatloaf, fajita meats.	Full line processor of pre-portioned meat products (including processed raw, breaded and unbreaded meats, breaded deep fried meats, and oven baked and flame broiled meats). Target markets include retail, foodservice and education.
Knauss Foods (www.knaussfoods.com)	625 E. Broad St., Quakertown, PA 18951	800-338-4111	215-536-1129	Natural beef jerky, beef nuggets, creamed chipped beef, beef steaks, beef sticks and pickled sausage.	Largest producer of naturally cured dried beef in the world. Beef jerky/sticks/sausage marketed under the name Bull and Hannah's. Are not really in private label at this point. Most of their business is based on the US Eastern coast.

Land O'Frost (www.landofrost.com)	911 Hastings Ave., Searcy, AR 72143	501-268-2473	501-268-0351	Thin sliced deli & luncheon meats: (2.5 oz ham, honey ham, beef, corned beef, pastrami, 6 oz. smoked ham, honey ham)	Only conduct business in the US. Use a broker and also have their own sales force. Ham is their top seller. Low fat deli meat is not as popular as it was a couple of years ago. Land O'Frost brand is the 7th largest selling lunchmeat in the US. Other lines of business: Ingredient supplier to major US restaurant chains, also produce prepared meals sold through catalogs and weight loss centres). Stated that promotional support for retailers is essential (even in private label), as well as consistent quality, on-time delivery and being able to offer the retailer a good profit margin.
Nodine's Smokehouse Inc.	65 Fowler Ave., Torrington, CT 06790	800-222-2059	860-496-9787	Produce 6 types of specialty bacon and specialty sausage including andouille and chorizo.	Purchase their pork from Canada. Supply product to British Airways and high end specialty stores like Dean & DeLuca.
Premio Foods Inc. (www.premiofoods.com)	50 Utter Ave., Hawthorne, NJ 07506	973-427-1106	973-427-5251	Italian sausages	Products consist of a breakfast sausage, specialty Italian sausages (Bell pepper, onion 7 mushroom; plum tomatoe, garlic & rosemary; cajun; and imported romano cheese with imported herbs & spices), kielbasa, chorizo & pork bracioli (sliced pork seasoned with garlic, imported cheeses and spices, rolled and tied up).
Rosina Food Products (www.rosina.com)	75 Industrial Pkwy., Buffalo, NY 14227	716-668-0123	716-668-1132	Frozen meatballs.	Specialize in "Italian" food products for retail and foodservice. Other products include: Italian sausage, meatloaf & pizza toppings.

<p>Seaboard Farms Inc. (www.seaboardpork.com)</p>	<p>9000 W.67th St., Ste. 200, Shawnee Mission, KS 66202</p>	<p>913-261-2600</p>	<p>913-261-2626</p>	<p>Marinated and flavored fresh pork loin filets, tenderloins, roasts and chops.</p>	<p>Launched their private label pork line at PLMA. Vertically integrated pork production system that allows the company to control all aspects of production from genetic selection to processing. Prefer to deal directly with the retailer, however will use a broker if requested by the retailer. Core products include: Extra Lean Pork Tenderloin (Peppercorn, Teriyaki, Honey Mustard, Mesquite BBQ, Lemon Garlic) & Pork Shoulder Roast (Onion Garlic, Roast Flavour, and Italian Style)</p>
<p>Sugar Creek Packing (www.sugar-creek.com)</p>	<p>2101 Kenskill Ave., Washington C.H., OH 43160</p>	<p>740-335-3586</p>	<p>740-333-3962</p>	<p>Bacon Processor. Foodservice (bacon bits & pieces, fully cooked sliced bacon, bacon pizza topping and single slice products which meet customer specifications including flavor: maple, mesquite, honey, pepper, and double smoked); Retail (fully cooked sliced bacon)</p>	<p>Sugar Creek is the nation's leader in bacon slicing capacity, producing over 100 million pounds per year. With six USDA inspected plants located in Bloomington, IL, Cincinnati, OH, Dayton, OH (2), Frontenac, KS, and Washington, OH., Sugar Creek can deliver most orders within 72 hours. Their state-of-the-art, USDA certified food laboratory helps maintain a quality standard. The centre is also integral to product development. Their bacon is sold under as many as 70 different labels across the U.S. Customers include: Kroger, A&P, Food Lion, Albertson's, HE Butt, & Winn Dixie. The company's private labelling capabilities are among the best in the industry, allowing customers to choose their bacon's grade, thickness, pickling formula and weight. They can select among a variety of options in labelling, tray pack color, and case-ready size packaging.</p>

<p>Tyson Foods Inc. (Refrigerated Processed Meats Division) (www.tyson.com)</p>	<p>300 Portwall, Houston, TX 77029</p>	<p>713-224-5901</p>	<p>713-678-1718</p>	<p>Products featured at PLMA were sliced lunch meat, canned meat, bacon, boneless ham.</p>	<p>The company is the largest provider of protein products (beef, pork & chicken) in the world. Average weekly production (2001) was 196,881 head (beef), 333,288 head (pork) and 42.5 million chickens. 2001 sales were \$24.975 billion broken down into the following distribution channels: Fresh meats (45.5%), Foodservice (23.0%), Retail (14.3%), International (11.9%), Case-ready (2.1%) and Other (3.3%). Private label clients include HE Butt, Food Lion, Dominicks, IGA and Cub Foods.</p>
<p>Quality Meat Group</p>	<p>145 East Dr., Bramalea, ON L6T 1B9</p>	<p>905-790-3737</p>	<p>905-790-1416</p>	<p>Fresh marinated pork and chicken products, retail and foodservice bacon, cooked and smoked sausages, cooked and smoked ham, full line of deli beef and poultry products.</p>	<p>Most successful product is their bacon, which they supply to Westfair, Sobseys, Loblaws, and A&P Canada. Private label makes up the majority of their business. Their individually packed, fixed weight kabobs came in the following flavors: teriyaki, smokey BBQ, souviaki (pork), honey garlic (pork). Also in foodservice (Supply Subway). Stated smaller companies can succeed in the private label market, however they must be very focused in their efforts (target niche markets).</p>
PREPARED ENTREES					
<p>Contessa Food Products (www.contessa.com)</p>	<p>222 W. 6th, Ste. 800, San Pedro, CA 90731</p>	<p>310-832-8000</p>	<p>310-832-8333</p>	<p>Frozen gourmet stir fry & complete meals, gourmet rice bowls.</p>	<p>(Meals include all the seasonings, meat etc.) Shrimp/chicken dishes most popular. PL for Trader Joes and Safeway.</p>
<p>Hindsdale Farms</p>	<p>605 Kresco Dr., Bristol, IN 46507</p>	<p>574-848-0344</p>	<p>574-848-0355</p>	<p>Corn dogs</p>	

Maple Leaf Foods (www.mapleleaf.ca)	30 Eglinton Ave. W., Mississauga, ON L5R3E7	905-501-3106	905-501-3420	Bacon, canned meats (ham, flakes of ham, klick, vienna sausages), deli meats (smoked ham, bologna, black forest style smoked ham, summer sausage, all beef salami), hot dogs and smokies, pork (lean medallion pork, frozen pork sausages).	Were primarily promoted their canned meats and frozen entrees. PL for Shopsy's (Royale brand name)
Ocean to Ocean Seafood Sales (Canada) (www.oceantoocean.com)	160 rue King St. Montreal, QU H3C 2P3	800-363-3802	514-871-8001	Variety of seafood and meat entrees (stir fries)	Primarily in the seafood business. Also provide products to foodservice. PL for Loblaws and Safeway.
Otter Valley Food Inc. (www.ottervalley.com)	95 Spruce St., Tillsonburg, ON N4G5C4	800-265-5731	519-842-4521	frozen prepared entrees (i.e. lasagne, chili, meat pies)	Stated private label is a "volume" intensive business. Develop private label for retail, foodservice and large food manufacturers (Campbells). Also developed CARE Cuisine® brand entrees, suitable for cafeterias, and the new concept hospital food vending centres. (Entrees are fully cooked, ready to be heated). Quality vital to success.

Request Foods (www.requestfoods.com)	3460 John F. Donnelly Dr., Holland, MI 49424	616-786-0900	616-786-9180	Frozen prepared entrees (lasagne, Salisbury steak)	Their 300,000 sq. foot, USDA approved facility has the capacity to mfr., 5,000,000 lbs. per week, and over 200 different product formulations. Pkg. sizes include 2, 2.5, 3 & 6 lb. pans, 10 & 12 oz pans/bowls, and 8 and 16 oz pouches. Other beef products include: beef burgundy, beef chow mein, pot roast, stew, beef tips & noodles, braised brisket, sheperds pie, shredded beef barbeque.
Schneider Foods (www.schneiders.ca)	321 Courtland Ave., E. Kitchener, ON N2G 3X8	519-741-5000	519-749-7406	Frozen Entrees/Appetizers	Offer frozen boxed meats for fundraising initiatives including: cooked meatballs, beef burgers, Octoberfest sausage, plus a number of chicken products. Other products include: Hot stuffs (portable meals you can eat with one hand), sliced meats, wieners, bacon.)
Venice Maid Foods (www.venicemaid.com)	270 N. Mill Rd., Box 1505, Vineland, NJ 08360	856-691-2100	856-696-1295	Canned soups, pasta, meat entrees, sauces and gravies.	Target retail and foodservice markets. Entrees include: Corned beef hash, chili, and beef stew. (15 & 24 oz). The company also has a Mexican product line, a selection of Italian soups, and a line of organic soups.
READY-TO-EAT FOODS					
American International Inc.	45 Eisenhower Dr., Paramus, NJ 07652	201-587-0101	201-587-2040	Corned beef, roast beef.	One of the nation's oldest import companies. Imports corned beef hash from Argentina and Brazil. Other products include processed seafoods, fruits and vegetables. Their pricing strategy tends to be a little higher than that of the competition, however the company focuses on providing exceptional service to their retailers.

J.R. Ouimet Inc. (www.jrouimet.com)	8383 J-Rene, Ouimet, Anjou, Quebec, H1J2P8	514-352-3000	514-352-3418	Stews, meat pates	
SNACKS					
Double B Foods (www.doubleb.com)	Box A, Schulenburg, TX 78956	979-743-6545	979-743-4014	Beef jerky (original, hot & spicy, teriyaki, all natural smoked, apple wood smoked, pecan smoked), smoked sausage rolls	Manufacture their own product. Beef jerky available in 1, 4, 6 and 8 oz. and .11 lb packages. Smoked sausage rolls can be microwaved and eaten on the run. Also specialize in co-pack partnerships. PL for Bridgebrand. Stated service is most important, followed by a high quality product.
Mirab USA (www.mirabusa.com)	91 W. Long Lake Rd., Ste. 8, Bloomfield Hills, MI 48304	248-594-1187	248-594-1189	Beef jerky.	Use beef from Argentina to make their jerky, because it has very little marbling. Produce 600,000 lbs/month. PL for Co-op/Safeway. Stated that quality and a competitive price are the most important to succeed in this market.