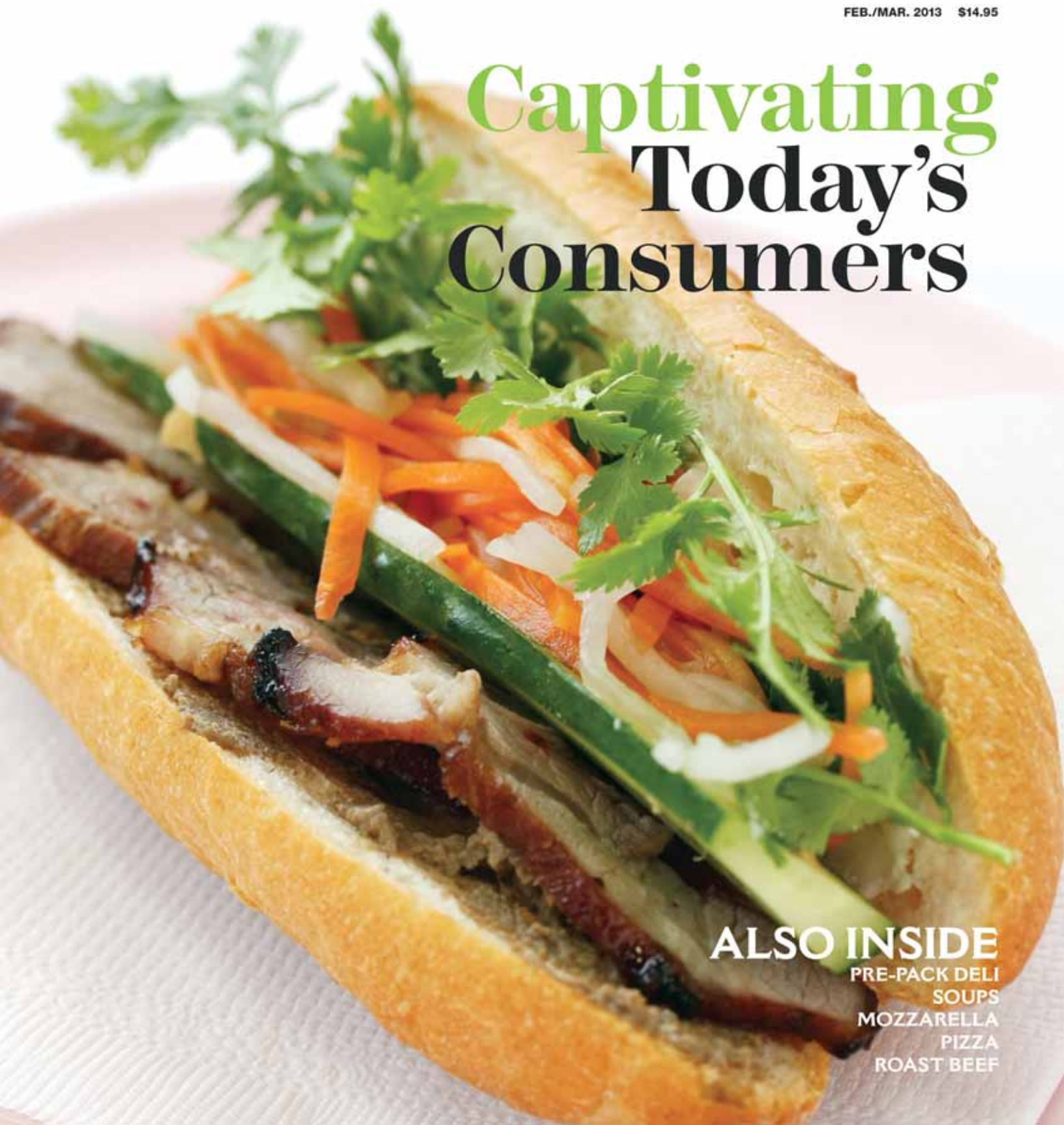


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COVER STORY



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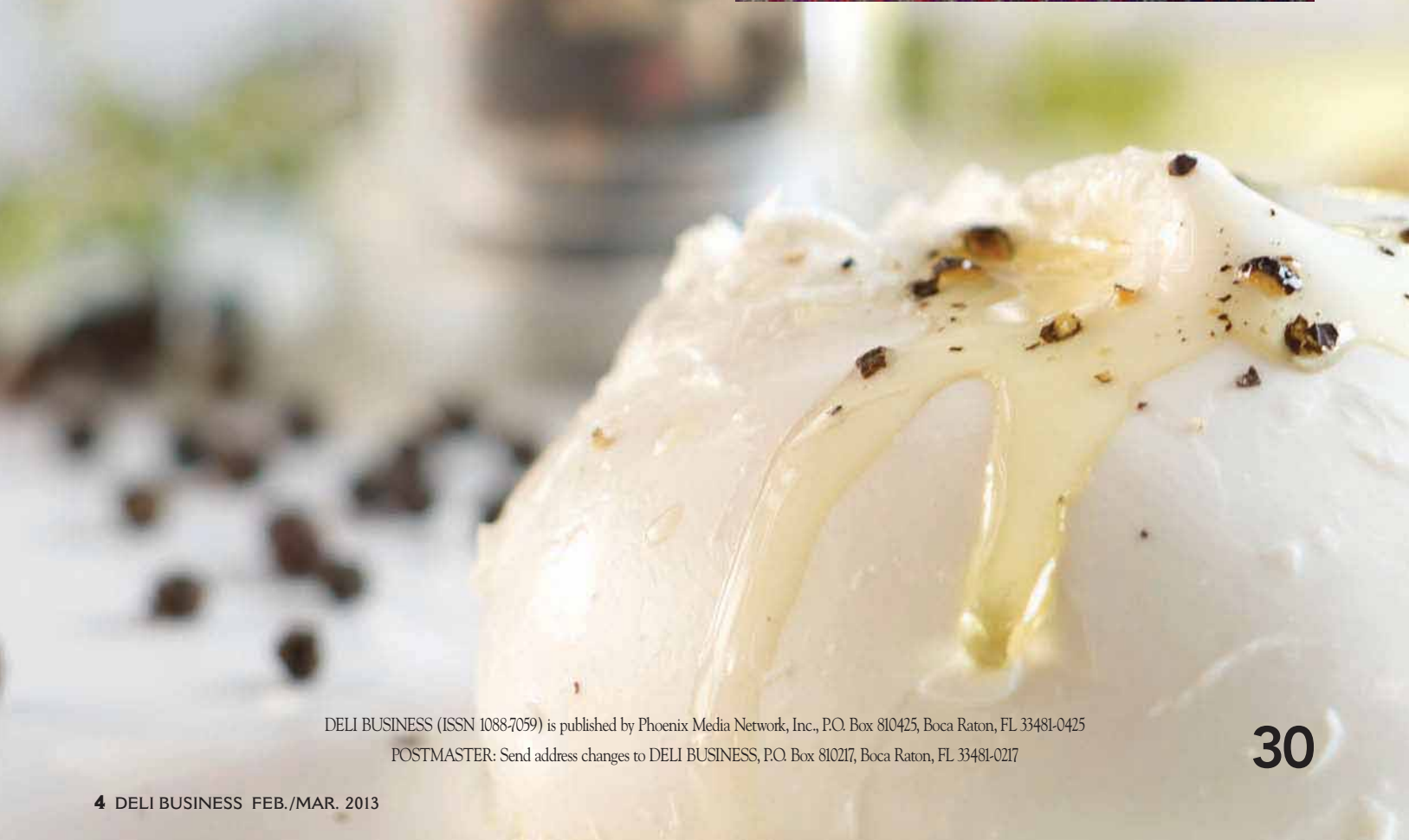
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EMMI ROTH USA PARTNERS WITH NO KID HUNGRY CAMPAIGN



Emmi Roth USA, Monroe, WI, has partnered with Share Our Strength's No Kid Hungry campaign — a national effort to end childhood hunger in America. The No Kid Hungry campaign connects kids in need to effective nutrition programs like school breakfast and summer meals and teaches low-income families to cook healthy, affordable meals through Cooking Matters. This work is accomplished through the No Kid Hungry network, made up of private citizens, public officials, nonprofits, business leaders and others providing innovative hunger solutions in their communities.

Emmi Roth will be a national partner and the official specialty cheese sponsor at four of Share Our Strength's Taste of the Nation events. At events in San Francisco, New York, Chicago and Los Angeles, attendees will be able to taste award-winning Emmi Roth cheeses, including Kaltbach Cave-Aged, Grand Cru and Buttermilk Blue. Emmi Roth culinary experts will also be on hand to offer insight into cooking with specialty cheeses.

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Specialty Cheese

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Food Safety Update

MERCHANDISING REVIEWS
Sandwich Condiments
Ribs & Wings
Pickles

PROCUREMENT STRATEGIES
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Cheese Plates
Wisconsin Cheeses



COMING IN JUNE/JULY 2013

DELI BUSINESS will present the winners of the 9th Annual People's Awards. If you would like to nominate someone to receive this award, please contact Jan Fialkow, managing editor, jfialkow@phoenixmedianet.com.

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CONVERTIBLE CONTAINERS

Anchor Packaging, St. Louis, MO, has redesigned its Culinary Classics line with a consumer-removable, perforated, hinged lid. Available as 9x9 and 9.5x10.5 in one or three compartments, the six containers in the line can handle temperatures up to 230°F and may be staged under heat lamps, in warming units, or microwaved. The design retains internal temperatures, while venting excess steam to preserve food texture and quality. They feature a cut-proof base and the new lid offers a convenient dining experience for consumers. The interlocking bases and lids, with excellent structural strength, make it easy to stack up to three high for convenient and safe transportation. Microwave-safe, dishwasher-safe and consumer reusable and recyclable. BPA-free. www.anchorpackaging.com



GRAB-AND-GO GREENWARE

Fabri-Kal Corp., Kalamazoo, MI, introduces Greenware On-The-Go Boxes that attractively present food for grab-and-go consumption and increased consumer appeal. The containers allow the flexibility to display an assortment of creative food combinations such as fresh fruit and dip, hummus and crackers and sandwiches and salads. Greenware On-The-Go Boxes are made from plants, not oil. Available in three styles with one flat lid that fits all, Greenware On-The-Go Boxes are available in 2-, 3- and 4-cell designs that are shrink-band compatible for tamper-evident applications. Crystal-clear, durable and stackable, Greenware On-The-Go Boxes have a compact, square shape to maximize cold case and shelf space. www.fabri-kal.com



FRENCH-STYLE CREPES

Kontos Foods, Inc., Paterson, NJ, has launched authentic French-Style Traditional and Savory Crepes for retail stores and foodservice operations. The crepes – significantly lower in calories, fat, carbohydrates, and sodium than other breads and wraps – can be used to create delicious, low-cal sandwiches, appetizers, meals, and desserts. Kontos offers crepes, refrigerated or frozen. Retail packaging: Savory and Traditional Crepes, nine inches in diameter; packages of six at 4.66 ounces, and packages of 10 at 7.76 ounces. Foodservice packaging: Savory and Traditional crepes in both 9-inch and 11-inch sizes, in packages of 10. The 9-inch is 7.76 ounces, and the 11-inch is 10 ounces. www.kontos.com



HARDWOOD-SMOKED SNACK STICKS

Old Wisconsin, Sheboygan, WI, introduces a tasty new lineup of Snack Stick products available in a variety of sizes and flavors. Perfect for all snack occasions, Old Wisconsin's Snack Stick products feature a unique blend of natural spices and real hardwood-smoked flavor and are a great source of protein. Building on the strength of Old Wisconsin's meat snack product line, the new selection of Snack Stick products includes: 1.5-oz. Hot Habanero Snack Stick, 1.5-oz. Original Snack Stick, 2.5-oz. Original Twin Stick, 2.5-oz. Turkey & Cheddar Smoke Stack, and 1.0-oz. Turkey & Cheddar Smoke Stack. www.oldwisconsin.com



BUTCHER-TRUSSED BONELESS CHICKEN ROASTS

Perdue Foods, Salisbury, MD, introduces Perdue Rotisserie Boneless Roasts. Satisfy shoppers' demand for boneless, skinless all white meat chicken. It's as easy and convenient as a standard rotisserie chicken with 73 percent more breast meat. This is the first product of its kind that's USDA Process Verified to be fed an all-vegetarian diet and raised cage free. They cook up great in the oven – saving valuable rotisserie time. Build your hot foods business with delicious, easy-to-prepare, slice-and-serve convenience. Each breast starts at around 1.75 pounds raw weight and has a finished cooked weight of approximately 1.25 pounds. 12 roasts in a sealed CVP bag for extra shelf life. www.PerdueRetailTrade.com



ANTI-FOG LIDS

Placon, Madison, WI, has announced new anti-fog lid technology on its entire line of PET cold deli food packaging products. The new anti-fog technology helps minimize lid condensation formation, providing excellent product visibility in cold food merchandising displays. Typically, fogging in food packaging applications occurs when products such as salsas, salads and other high moisture content foods are merchandised or stored in a cool environment such as a cold display case. Placon's crystal-clear, anti-fog lids are engineered to bead moisture build-up, allowing consumers to easily view the container's contents. Placon's PET deli food containers are made with 100 percent recycled materials that are 100 percent recyclable. www.placon.com



OLD WORLD DELI MEATS

Pulaski Meat Products, Linden, NJ, has launched a new line of hand-crafted branded deli meats called Deli-Essentials in response to consumer desire for minimally processed luncheon meats that taste great and are made without fillers. With over 44 years of family tradition and experience, Pulaski Meats is now offering the new line to retailers, wholesalers and distributors. The new line is also available for private-label programs. The Deli-Essentials line is based on Old World family recipes and is hand-made by an elite group of butchers who spent years in Europe apprenticing before immigrating to the United States. The new line consists of hams, loaves and specialties and loins. www.pulaskimeats.com



SWEET CHILI NAAN

Stonefire Authentic Flatbreads, Toronto, ON, Canada, has introduced Sweet Chili Naan Flatbread. Hand-stretched and prepared with ghee (clarified butter) and fresh buttermilk following a traditional recipe, Sweet Chili Naan is made with crushed spicy red chili and sweet red bell pepper flakes to offer the perfect balance of sweet and spicy. Like all Stonefire flatbreads, the Sweet Chili Naan is made free of preservatives, additives, artificial colors, trans fat and hydrogenated oils. An extremely versatile flatbread, great as a base for creative toppings, preparing pizza or a grilled sandwich, or served with dips, the unique, sweet and spicy flavor makes it a delicious accompaniment to sharp cheeses, spiced meats and a myriad of dips. www.stonefire.com

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A HERITAGE OF INNOVATION.



by Jim Prevora, Editor-in-Chief

A Major Retail Opportunity

Sharon Olson and her Culinary Visions Panel are irreplaceable resources for the industry and in this month's cover story, *Captivating Today's Consumers*, they offer us unusually valuable information. Three key points stand out:

1. Focus on key consumers, not just big consumers.

As IT capabilities have grown, retailers have shifted the definition of "best" customer. Thirty years ago the best customer was the one who spent the most money, the one whose cart was overflowing with goods. As they gained the capability to more finely discern the value of various consumers, it became obvious this was not the whole story. The consumers who bought the highest dollar amounts often had the largest families and were under financial stress. They sought out bargains, used coupons, cherry picked for specials. These consumers were often acutely aware of pricing and waited for sales to stock up. In many cases, their overflowing shopping carts were not very profitable at all.

In contrast a young bachelor may buy much less — he is, after all, just one person. However, he selects the location at which he shops based primarily on convenience and is not particularly focused on competitive or historical pricing — he buys what he wants when he wants it. A great deal of what he wants tends to be high-margin prepared food from the deli. So this smaller-volume customer tends to be a much more profitable one to have in the store.

This issue has grown more important with the growth of supercenters and warehouse club, leading supermarkets to compress margin on many center-of-the-store items to remain competitive. Large sales of products sold as loss leaders or at low profit margins are not, of course, the goal. So with the use of advanced IT, we have gradually learned to focus our efforts on not simply getting more customers or big customers but, rather, on attracting profitable customers to our stores.

Now Sharon Olson, in an astute insight, is prompting the next wave in customer valuation. She points out that two customers who spend the same dollar amount with a store, who even produce the same gross profit with the store, are not, in fact, created equal.

Because certain customers are opinion leaders, their family, friends and co-workers respect them for expertise on food and shopping. Their peers look to them for insight, information and recommendations.

Marketing to enthusiast sectors is not new. Automakers have long advertised heavily in enthusiast magazines, such as *Motor Trend* and *Car and Driver*, heavily read by teenage boys who don't buy any cars at all. But if they tell their parents that the engine in the new Buick they're thinking about buying is going to be nothing but trouble, the parents listen because their

sons know more about the subject than they do.

Sharon is suggesting there's an opportunity to focus our attention on presenting stores that will attract not only highly profitable customers but also customers who will, in effect, serve as ambassadors for our banners, convincing others the products and services we offer are superior and make us the place to shop.

2. Recognize that consumers differ dramatically by flavor preferences — not just income or ethnicity.

What an insight! Micromarketing is almost a cliché. Of course, we all know that in a country as diverse as the United States offering a uniform assortment across a disparate shopper base is a loser. Typically micromarketing efforts have focused on ethnicity or income as the differentiating factors; Sharon now establishes a third, independent variable: Irrespective of income or ethnicity, people value different taste profiles and the "foodies" likely to influence others as to shopping choices have distinct preferences for sour, bitter and umami flavor profiles rather than the mainstream preference for salty and sweet flavor profiles.

This means product development teams, product testing efforts and much else need to be reorganized to make sure flavor profiles that are not the most widely prized but that are prized by the key consumer influencing segment of shoppers are made available and appropriately promoted.

3. Small differences matter a lot.

To the uninitiated, the graph on page 20 contrasting the interests of foodies with those of mainstream consumers seems to show only small differences. Only the foodie interest in ethnic foods exceeds the interest of mainstream consumers by more than 10 points. On most issues, the differences are only three or four percentage points. And yet these small numbers make all the difference. The key thing to recognize in interpreting research is that all the leading players tend to quickly focus in on very large disparities. So they quickly become the ante necessary to play in the game. It is in focusing on seemingly small matters — a desire for kosher food or Laotian cuisine — that one finds the opportunity to differentiate and thus be a magnet for certain consumers.

This insightful piece of research points to the foodie culture as a major opportunity for retailers to attract loyal customers, create brand ambassadors and build business by embracing those customers and prospects who truly love food.

DB



James J. Prevora

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by Lee Smith, Publisher

Where's the Love, Baby?

Oh, you need cheese. You really need cheese. It's not just expensive imports or domestic commodities. It's not just goat or sheep or cow cheese. You need the passion behind the cheese movement — that is if you can handle it. Do you like being challenged? Do you like people who will get mad if you aren't as good as you can be? Can you deal with employees who will look at your organization as a partner and leave you in a heartbeat if you fail to deliver? Or do like complacency and a sycophantic attitude?

If you're looking for passion, you need cheese. Let me give you an example.

Take Matthew Feronze, age 30, a British civil servant, in particular a government accountant. He decided to take a two-year unpaid sabbatical because, in his words, "I'm a food-obsessed Francophile chasing the cheese dream." He somehow got a job at Fromagerie Mons — one of France's finest cheese shops, run by Etienne Boissy in Lyons.

Matthew worked really hard, so much so that his employers paid for additional training. They were so impressed with their new temporary employee that they entered him in the Concours National des Fromages Competition, one of the most grueling contests in the world. This competition scares even the most seasoned professionals. After making it through all the preliminary rounds, he made it to the final 15 of the original 100 contenders.

In addition to overcoming nerves, he had to do a blind tasting of a cheese of the judges choice. Ideally, contestants had to name the cheese, the region and area of its origin, the type of milk and perhaps even the breed of animal. Then there is a selection of cheeses — again judge's choice — for which they must write complete tasting notes. The grand finale is a selection of 25 cheeses — 10 chosen by the judges and 15 chosen by the competitor — that must be made into a spectacular cheese platter.

Guess what? He won. The first non-Frenchman to win. His reaction — "I'm considering looking for a new job in cheese." It would seem accounting has lost its panache.

If you think he's an anomaly, you're mistaken. Granted, Matthew must be somewhat of a genius, but he's also emblematic of the cheese world. Passionate, dedicated, resourceful. An example of someone looking for more out of life.

The challenge for retailers, especially mainstream supermarkets, is how to take advantage of this oppor-

tunity. How do we take the passion of cheese and transfer it to other departments?

If we're honest, we'll admit supermarkets and retailing in general have not had a reputation as being a great career choice. When I was in my early 30s, people's first reaction to hearing I worked for a supermarket chain was that it was a shame I was a cashier or that my parents had wasted their money on my education — usually accompanied by a long, drawn-out sigh.

Without question, it's difficult to draw the best and the brightest to our industry. This attitude has led to scores of high school and college students automatically dismissing a career in retailing. It's meant excessive turnover and a general lack of employee pride. That translates into untrained associates, high shrink and shortcuts taken at every level.

The first task is to make sure cheesemongers not only want to work for your company but also have a way to transfer their enthusiasm to co-workers and to management. How do we get managers, buyers and supervisors to have the same passion that drives workers who are established in other professions to quit their jobs so they can go work for a cheesemaker or cheese shop as an intern?

Retailers haven't initiated the cheese trend but there's no question we can ride on its coattails. The real challenge is to learn and develop the same passion in store chefs, produce clerks, florists, butchers, seafood managers and others. If we can do that, we're talking about a real game changer for the industry. We need a culture where people are trying to get in, not looking for a way to get out.

One place to start is to look at the Certified Cheese Professional (CCP) exam the American Cheese Society has developed. In its second year, it looks as if it will once again have a waiting list and once again garner national coverage and exposure. Personally, I've had a couple of people who were looking to open new stores ask me if I knew any CCPs who were available.

And then there's Matthew Feronze. He really did take a two-year sabbatical from a good government job to work for a small retailer in France. He kissed a cheese and liked it. **DB**





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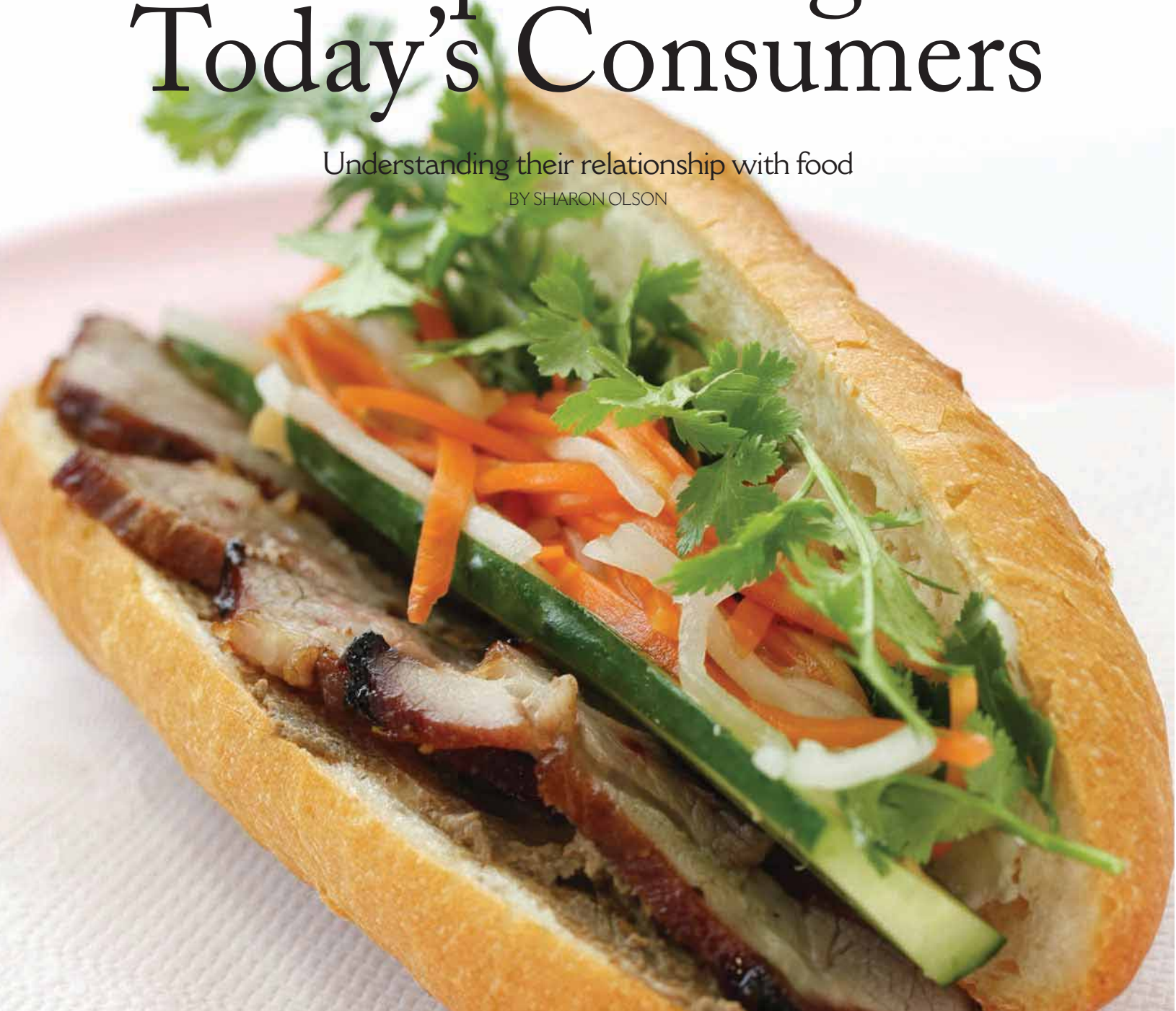
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Captivating Today's Consumers

Understanding their relationship with food

BY SHARON OLSON



Serving up the latest trends to today's deli consumers is a continuous challenge. A recent news story or a celebrity touting a new diet can be all it takes to create demand. To better understand if, how and when to jump on the latest food fad, the Culinary Visions Panel surveyed over 2,800 consumers to better understand their relationship with food and the choices they make related to food and flavor in a wide range of venues, including the deli.

The inspiration for the research was to explore why demographically identical customers can have very different purchasing behavior. The



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study found that the consumers' relationship with food can be more important in anticipating their purchases than their demographic profile.

Although it is possible to micro-segment consumers by many different characteristics, the Culinary Visions Panel focused on the consumers' purchase intentions and desire to try new foods as opposed to sticking with their tried-and-true favorites. Foodies were identified by their stated purchase intentions, not just by their interest in food. Foodies always or usually like to try new items on a menu or in a retail food store. Mainstream consumers were defined as those who like to stick with their favorites but will some-

times try something new.

In this study foodies and mainstream consumers made up 98 percent of the consumers surveyed. Of this group, 54 percent were foodies and 46 percent were mainstream consumers.

Foodies matter because they are going to be the first to try new items and tell their friends and family about the experience. Mainstream consumers are important, too, because they can be the loyal core-customer base for a store. Captivating both foodies and mainstream consumers is important to successful food businesses to build a reputation for exciting new offerings and maintain strong, steady business that

relies on more than the occasional culinary adventure seeker.

Flavor Preferences

Foodies and mainstream consumers have very different perspectives on flavor. Since the experience of flavor is essential to creating satisfaction, Culinary Visions Panel explored the differences in perceptions and understanding of the five flavor profiles — sweet, sour, salty, bitter and umami. Menu concepts were developed that included key ingredients that would typify each of the major flavors. All of the menu concepts were designed to sound desirable and delicious on a restaurant menu or as an offer-



Demographics of Foodies and Mainstream Consumers

	Male	Female	Age: 17-34	Age: 35-46	Age: 47-65	Age: 66+
Foodies	54%	54.5%	60%	57%	45%	26%
Mainstream	46%	45.5%	40%	43%	55%	74%

Source: Culinary Visions Panel 2012

ing in the deli case.

Foodies and mainstream consumers preferred distinct differences in flavors. Salty (54 percent) and sweet (52 percent) were the preferred flavors for mainstream consumers. However, consumer foodies who were interested in more culinary adventure noted bitter (62 percent), umami (61 percent) and sour (59 percent) flavors more often as their favorites.

Preferences for Ethnic Flavors

Foodies were more willing to try new items with ethnic flavor profiles than mainstream consumers. Mainstream consumers were more willing to take a chance purchasing something unfamiliar if it were not the main focus of the meal but rather a side

dish or a dessert. More than half (56 percent) of foodies also considered the availability of ethnic flavors important to their deli shopping experience as opposed to 43 percent of mainstream consumers.

Mediterranean, Latin and Asian flavors were studied as the most popular ethnic platforms. Mediterranean salads were the most commonly mentioned items that consumers wanted to see more of in the deli. Latin flavors requested most often related to sandwiches, the Cuban sandwich in particular. Thai dishes were the most commonly desired Asian dishes.

Mariano's Fresh Market stores in the upper Midwest serve up a wide range of ethnic recipes at their World Eats Food Bar. Chefs create destination flavors in authentic

recipes from many parts of world including China, Italy, Mexico and India. Certified sushi chefs work on-site delivering a restaurant quality sushi experience for shoppers

Value Perceptions

Consumers valued different characteristics in the deli versus a restaurant or a convenience store; their expectations adjusted for the venue. Foodies and mainstream consumers had similar opinions on many of the key characteristics of a good shopping experience in the deli.

Foodies and mainstream consumers valued quality and price, but in a different order of preference. Ninety-three percent of mainstream consumers considered price important or very important in their deli

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Flavor Preferences of Foodies and Mainstream Consumers

	Salty	Sweet	Sour	Bitter	Umami
Foodies	43%	45%	59%	62%	61%
Mainstream	54%	52%	35%	37%	35%

Source: Culinary Visions Panel 2012

choices compared to 83 percent of foodies. For foodies the most important characteristics of their deli experience were flavors they liked and cleanliness of the deli department, noted as important or very important by 89 percent of them.

The variety of prepared foods offered was important to 83 percent of foodies and

ager Candace Warner says they focus on satisfying their foodie customers' taste with less perishable items such as a selection of exquisite olive oils because they don't have high enough volume to warrant bringing in a

large variety of fresh foods for foodie tastes.

Culinary Discovery

Understanding where consumers go to learn about foods and flavors is important to capturing their attention. Foodies seek out a lot of different sources — culinary research is somewhat of a hobby to them. Mainstream consumers rely heavily on friends and family, and some foodies are undoubtedly among those friends and family members.

For foodies, cookbooks were the No. 1 source, noted by almost 60 percent of foodie consumers. Mainstream consumers relied more on family and friends at 66 percent.

Magazine articles, newspapers, on-line

FOODIES MATTER BECAUSE THEY ARE GOING TO BE THE FIRST TO TRY NEW ITEMS AND TELL THEIR FRIENDS AND FAMILY ABOUT THE EXPERIENCE. MAINSTREAM CONSUMERS ARE IMPORTANT, TOO, BECAUSE THEY CAN BE THE LOYAL CORE-CUSTOMER BASE FOR A STORE. CAPTIVATING BOTH FOODIES AND MAINSTREAM CONSUMERS IS IMPORTANT TO SUCCESSFUL FOOD BUSINESSES.

79 percent of mainstream consumers. Feeding the need for variety is a focus at New Seasons Market stores in Oregon and Washington where over 100 different artisan and farmstead cheeses are offered. Their locally sourced offerings range from tangy blue cheese from Rogue Creamery to Tillamook Cheddar perfect for burgers.

Offering an extensive variety is often a challenge for the retailer that needs to turn pricey perishables quickly. At Convito Café and Market in Wilmette, IL, general man-





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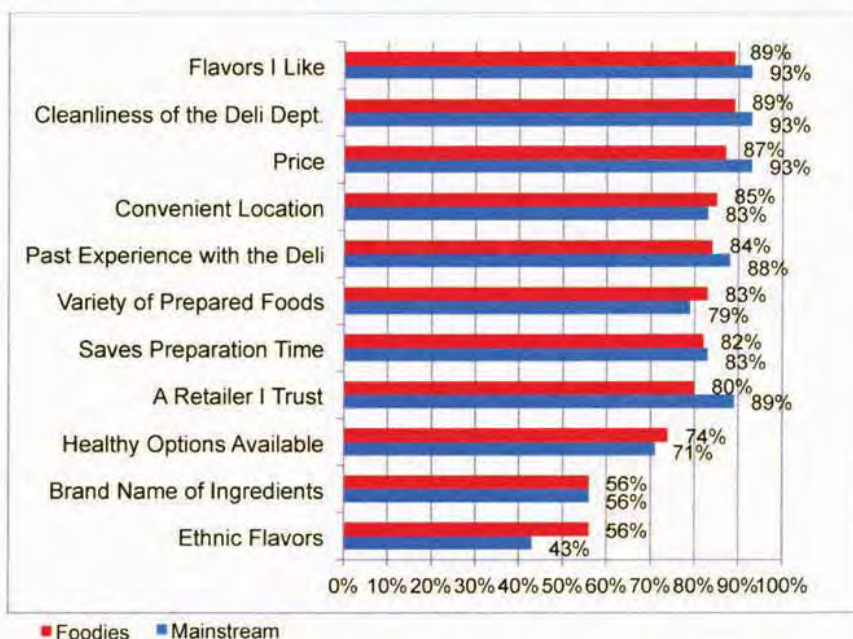
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Important Characteristics of the Deli Shopping Experience



CONSUMERS VALUED DIFFERENT CHARACTERISTICS IN THE DELI VERSUS A RESTAURANT OR A CONVENIENCE STORE; THEIR EXPECTATIONS ADJUSTED FOR THE VENUE. FOODIES AND MAINSTREAM CONSUMERS HAD SIMILAR OPINIONS ON MANY OF THE KEY CHARACTERISTICS OF A GOOD SHOPPING EXPERIENCE IN THE DELI.

recipes and television programs all play a role in our food-centric culture, each being noted by at least 30 percent of all respondents.

Consumers are most likely to experience a new flavor at a restaurant rather than at home, at a friend's or relative's home or sampling while shopping. Fifty-three percent said they experienced new flavors at a restaurant, while only 13 percent noted a retail sampling experience. Foodie consumers were much more likely to have experienced a new flavor at a restaurant, with 64 per-

cent of foodies reporting such, compared to 45 percent of mainstream consumers.

Mainstream consumers were more likely than foodies to report having a new flavor experience at a friend or relative's house or from an in-store sampling experience, at 20 percent and 18 percent respectively. Only 6 percent of foodies reported having a new flavor experience at a friend's or relative's home and 7 percent reported new experiences from in-store sampling.

Few understand the relationship between the restaurant experience and the deli experience as well as Nancy Brussat and Candace Warner, partners at the Convito Café and Market. They have been treating their customers to an authentic Italian food and wine experience in their restaurant and deli for 33 years. A recently installed cooler at the front entrance features single and sharable-for-two portions of some of their most popular restaurant recipes for market shoppers to bring home.

Although Convito has distinctively different customers in their restaurant and their deli, their authentic recipes have made both a destination for local consumers. Among the ten varieties of homemade cannelloni and lasagna they make, one special is offered daily. "When we first started we had to call some of our more adventurous flavors 'tortas' because our customers only considered one or two of our classic recipes to be real lasagna. Today our customers enjoy a much wider range of flavors including our butternut squash lasagna," accord-

ing to Brussat.

Thrilling a Foodie

When foodies were asked what thrilled them at the supermarket, the answers resoundingly focused on taste. Fresh, colorful and appetizing were adjectives used to describe food offerings that were hard to resist. When it comes to ingredients, less is more. There were many comments about the importance of "no" — no antibiotics, no hormones, no preservatives. "A nice person handing out samples," was a recurring comment related to positive market experiences.

Understanding demographics are only the beginning of understanding how customers make their decisions about food. Understanding their relationship with food and crafting a selection of offerings to appeal to both foodies and mainstream consumers can be the tipping point for success. **DB**

About the Culinary Visions Panel

The Culinary Visions Panel (www.culinaryvisions.org) explores a wide range of culinary topics with leading food industry professionals and consumers. Roundtable discussions with food industry thought leaders guide the crafting of consumer surveys on emerging issues throughout the year. Sharon Olson is the executive director.

FAST AND FRESH

Pre-pack deli satisfies both retailers and consumers

BY BOB JOHNSON



Driven by deli retailers' interest in reducing labor costs and consumers' interest in reducing the amount of time they have to spend waiting in line at the service deli, pre-packaged deli products have seen a dramatic increase. The trick to making the most out of these efficient and convenient grab-and-go items is finding pre-packaged products that also meet deli standards when it comes to being healthy, interesting, and fresh.

The increase in pre-packaged deli products across a wide range of categories is all about the savings — savings in labor, time, and shrink.

"In the soup category, there are very, very few retailers that still make and pack soup from scratch. As such, the conversion to fully prepared solutions has already been widely embraced and the labor

savings realized," says Levon Kurkjian, vice president of marketing at Kettle Cuisine Inc., Chelsea, MA.

It isn't just the deli retailers looking to save on time, however; deli consumers are also looking to save time and pre-packaged foods can help them do it. "Most of what we sell is in the meat department, but some of our Old Wisconsin sausage products are sold in the deli. People find their time valuable — if there's a line at the deli, they'll go to the pre-packaged," says Tom Buddig, executive vice president for marketing at Carl Buddig & Co., Homewood, IL.

In addition to saving time, pre-packaged items can also be an effective way to manage shrink, particularly as a replacement for olive bars. "We're seeing olive bars shrinking and pre-packaged olive products increasing. Last year we had meetings during the IDDBA [Interna-



PHOTO COURTESY OF KETTLE CUISINE

tional Dairy-Deli-Bakery Association, Madison, WI, Expo] with some of the larger buyers, and they were concerned about olive bar shrinkage,” says Dean Spilka, president of Norpaco Gourmet Foods, Middletown, CT.

Only time will tell how much of the decline in olive bars is attributable to consumers tightening their belts in tough economic times. “The decline in olive bars may have to do with the economy and people deciding not to buy some of the things they like. With the olive bars we’ve experienced a 12 percent drop. We certainly hope the prepared products will be enough to make up for that. My understanding is it’s driven by shrink. Nobody told me it was about labor costs,” Spilka says.

Fresh and Healthy

The deli has a reputation for offering foods that are healthy, interesting and fresh. To be successful, a pre-packaged program must maintain that perception. Fortunately many consumers perceive pre-packed items as offering superior freshness.

“I think pre-packaged products enhance the perception of freshness,” says Kettle Cuisine’s Kurkjian. “Consistently in both quantitative and qualitative surveys, shoppers view the pre-packaged refrigerated soups as being freshly made and better tasting and better for them than the extensive offerings of shelf-stable alternatives.”

This perceived freshness edge can be enhanced when the consumer gets the products home and sees how long they last. “I think they find the shelf life when they get it home is longer if it was pre-packaged,” Buddig of Carl Buddig says.

According to Wendy Benson, associate product manager, Jennie-O Turkey Store Sales, LLC, Austin, MN, “Our Jennie-O Premium Portions Turkey Breast products are high-quality, whole-muscle turkey breasts pre-packaged in individual pieces just over a pound. Premium Portions offer consumers variety in addition to their convenience and quality, as they’re made in four popular, great-tasting flavors: oven roasted, cracked pepper, sundried tomato and Cajun style. Jennie-O Premium Portions are also versatile. They can be sliced for salads, diced for use in appetizers, and are a convenient lean protein snacking option. And, of course, they’re a great addition to sandwiches and wraps.”

The jury is still out, however, on whether consumers will consider all categories of pre-packaged as providing optimum freshness. “Olive bars have the image of freshness. Will prepared products give you the fresh image? It’s too soon to tell,” Spilka notes.

One strategy to maintain the fresh image is to take care that the pre-pack program includes an abundant array of interesting choices. “We’ve got 12 products out there already. We’ll add about another eight to make it a total of 20 or so,” Spilka adds.

Variety can also enhance the deli reputation in the packaged soup category. “In the soup category, every type of variety has been widely accepted by consumers including soups, chilies, stews, gumbos and bisques,” Kurkjian says.

Another way to build the deli reputation is by including pre-packaged items that have a clear edge when it comes to healthy ingredients. “We’re taking advantage of consumers’ demand for lighter and healthier

options by providing products made with more nutritious, recognized and trusted ingredients,” explains Mark Sandridge, CEO of Sandridge Food Corp., Medina, OH. “One example is our new Fresh and Delicious Salad line that features crisp fresh vegetables, fiber-rich beans, real sugar, sea salt and olive oil and canola oil. Some of these salads can be touted as preservative free, which is the current top claim on packaging.”

An important part of the ingredient edge can be finding pre-packaged items that use alternatives to salt and fat to provide flavor. “Products that are lower in sodium, lightly dressed and non-mayo-based — such as couscous, bean salads, barley, and quinoa — have grown in popularity. Dishes with ethnic flair and trendy ingredients have also become more favorable, including products with dried fruits, nuts, unique proteins — for example our new Pacific Coast Cuisine premium seafood salads — more flavorful greens like arugula and kale, and roasted vegetables,” Sandridge adds.

The skill of the chefs creating the recipes is key. “Offering alternative reduced-sodium options for favorite foods, while maintaining existing taste profiles, is a good start in shifting current sodium consumption behavior. Sandridge recently did this by introducing a new line of reduced-sodium fresh soups in four favorite flavors. Only skilled chefs can successfully replace sodium with other spices to make flavor bloom and create more with less. If done incorrectly, introducing a low-fat or reduced-sodium choice with a completely different taste profile than the original will miss the mark with consumers,” Sandridge says.

Who’s Buying?

It’s particularly important to attract consumers of pre-packaged items because, regardless of age or region, these on-the-go consumers tend to be frequent shoppers. “The typical pre-packaged lunchmeat consumer purchases and consumes lunchmeat several times per week. These consumers are looking for products that have a great taste, stay fresh and are a good value for themselves and their families,” says Robert Gay, marketing director at Carl Buddig.

Younger people lead the way when looking to the deli for healthy and interesting items that can be easily picked up off the shelf. “This category appeals to a wide range of consumers but consumer data from Mintel’s *Soup Report* suggests younger consumers adopt the category much more than older consumers. The highest age bracket of adoption is 25 to 34,” Kurkjian notes.

Joining younger consumers in setting the trend are older consumers, especially boomers, who are adopting healthier life

styles. “Younger generations have become influential in product development with their desire for bold, trendy and ethnic flavors. Consumers in their mid 50s and older are also a major influence in more nutritious products, as they typically eat the healthiest due to underlying medical conditions that necessitate it according to NPD Group’s *Health Eating Strategies Report*,” Sandridge says.

The desire for convenient but healthy and interesting items has reached virtually every size town or city in the country. “Regionally, about 28 percent of health-conscious deli shoppers live in large cities, 27 percent in small cities or towns, 26 percent in suburban areas and 18 percent in rural areas according to research from IDDBA’s *What’s In Store 2012*,” Sandridge says. “In regard to income, a Counter Intelligence study finds that the most frequent deli shoppers are people with incomes of \$50,000 to \$74,000. Demographic studies of types of shoppers show that the health-conscious segment (people concerned about different nutrition attributes in food) shop the supermarket more times per week than the average consumer,” Sandridge adds.

Within this group, significant numbers of people are looking for family dinners or convenient lunches to take back to the office. “More qualitatively, consumers of pre-packaged fresh soup are those who are living really busy lifestyles and, in parallel, are focused on eating great tasting, good-for-you foods that are very convenient. Some of the highest eating occasions for soup in this format according to the same Mintel report are...73 percent as an individual meal at home, 50 percent as a family meal at home, 33 percent as a snack at home and 32 percent as a lunch at work,” Kurkjian says.

What Size Convenience?

Depending on the category of pre-packaged deli foods, particular sizes have emerged as most popular.

For olives and antipasti, relatively modest sizes of a half pint or less lead the way. “It seems that the most popular size is six to eight ounces,” Spilka says.

For pre-packaged soups, somewhat larger sizes are more popular, including sizes suitable for taking home and heating for a family meal. “In the fresh and refrigerated soup category, the most common sizes by far are 16-ounce and 20-ounce prepackaged cups. There are other sizes sold in the market but they’re much less common. There’s a promotional or family serving size in a 32-ounce cup and there are some smaller serving sizes that range from 8-ounces to 12-ounces,” Kurkjian explains.

Grab-and-go meat products can effec-

tively include sizes large enough to serve as the center of the plate for a family. According to Jennie-O’s Benson, “The Slow Roasted Turkey Pot Roast serves four and is an excellent pre-packaged item that consumers can grab off the shelf and easily pop into the oven to deliver an amazing product at the dinner table that they can be proud of. This turkey pot roast is extremely versatile and can be served either as a roast or as a shredded center-of-the-plate entrée. It can

also be enjoyed in many other meal applications such as sandwiches, salads, or as delicious leftovers.”

Nearly half of all the sales of pre-packaged lunchmeat are either one pound or clustered near a half pound. “The two most common sizes of pre-packaged lunch meat, according to Nielsen, are 1-pound pouches or tubs, at 26 percent of the category, and 7- to 10-ounce tubs or trays, at 21 percent of the category,” Buddig’s Gay says. **DB**



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Creating a Year-Round Soup Program

Deli soup purchases are growing substantially

BY BARBARA ROBISON

Deli soup purchases are on the rise because consumers see soups as a viable meal solution, according to *What's in Store 2013* from the International Dairy-Deli-Bakery Association (IDDBA), Madison, WI. The publication showed deli soups contributed a 2.1 percent dollar share to deli prepared food sales in the 52 weeks ending March 31, 2012. Nielsen Perishables Group's *Fresh Facts* reported the category saw a 5.2 percent growth over that year. Fresh Look Marketing's *Fresh View* noted nearly 8.5 million pounds of soup were sold at supermarket delis during that same time frame.

More consumers are making a greater number of unplanned soup purchases, seeking answers to the perennial what-will-I-serve-for-dinner question. "Keep the soups filled and ready for dinner, midday and evening shopper" is the advice offered in *What's in Store 2013* by Jason German, product manager of DeliTrack, a tracking service from Port Washington, NY-based NPD Group Inc.

"Fresh soup as a category is really heating up in both the hot and chilled formats. During the economic downturn several years ago, the category slipped from its previously strong sales growth, but shoppers have come back to the category in a strong way. Not only are a higher percentage of shoppers purchasing the category, but they are also purchasing more often. This has led to more retailers increasing their commitment to the category," states Levon Kurkjian, vice president of marketing, Kettle Cuisine, Chelsea, MA, a marketer of refrigerated soups, chilis, chowders and stews. The company markets bulk pouches for use in hot soup stations.

One of the biggest flavor trends Kettle Cuisine has seen is the demand and acceptance of less traditional and more adventurous varieties with inspiration from Southeast Asia, for example, Thai curry chicken soup; India, for example, Indian lentil stew; North Africa, for example, Moroccan lamb stew;



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and various regions across the United States, for example, shrimp and sausage gumbo.

Growing consumer desire to try new items has resulted in increased deli purchases. Among the most popular soups from Select Store Brands, a division of Halburton International Foods, Ontario, CA, are tortilla, triple mushroom, and chorizo and black bean soups as well as light roasted cauliflower bisque. "As you can tell by our winners, you're not seeing the same old type soups," says Bobby Ray, vice president, retail and private brands. "Many delis are simply worn out with chicken noodle and tomato soups. They want to try something new, and consumers are embracing the new soup ideas — and loving them."

"Refrigerated soup is a small but a very fast growing sector as shoppers opt for fresh soups at dinner, or as toppers for rice or pasta," Elizabeth Sloan of *Food Technology Magazine*, Chicago, IL, points out in the IDDBA publication *What's in Store 2013*.

According to Lynnea Jodway, marketing coordinator, Sandridge Food Corporation, Medina, OH, a marketer of fresh refrigerated soups, "Vegetable-based soups are on the rise as consumers look for healthier options in every aspect of their diets. Also growing in popularity are soups



PHOTO COURTESY OF SANDRIDGE FOOD CORPORATION

with global flavors or uniqueness to them, like our white chicken chili and Gumbolaya. The entire fresh soup category [soups, stews and chilis] has undergone strong growth. We have enjoyed double-digit growth in both the bulk and retail fresh soup arenas across the board.

"Fresh soup represents a really good value for the money and also offers a convenient meal solution, which we believe is driving the positive sales growth trend. The

perception of fresh soup is quite different than that of the shelf-stable competition. Fresh soup is popular choice for snacking, lunchtime meals and as center-of-the-plate dinner meals," she continues.

The soup menu should have a good balance of the familiar flavors and on-trend varieties to serve the various demographics. "A strategic soup set up should include seven different varieties, rotated daily, which accompany the traditional favorites," Jodway adds.

The consumer quest for healthy foods has impacted deli soup purchases, says Bob Sewall, executive vice president of sales and marketing, Blount Fine Foods, Fall River, MA. "Soups are trending towards having healthier and special dietary attributes," he explains. "Organic, low-fat, all-natural, good source of fiber, 150 calories or less per serving, and gluten-free are some of the information consumers search for when reading soup labels today." The company markets soups under the Panera and Legal Sea Foods labels and also develops private label hot-to-go programs for supermarkets.

"We encourage our customers to look at nutrition in a more balanced way and to emphasize all of the nutritional benefits of our soups. This would include nutrient claims like low fat or no cholesterol but also positive claims like high in fiber or full serving of vegetables. Such claims as no artificial ingredients, allergen friendly or gluten free provide a more balanced view of nutrition and allow operators to reach a wider range of shoppers," says Kettle Cuisine's Kurkjian.

Year-Round Soup Programs

Hot soups are popular in many deli departments, especially those located near office buildings. Kettle Cuisine has found hot soups and refrigerated soups play off each other. They don't cannibalize each

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are putting in wells and kettles to cater to the consumer picking up lunch for the day or grabbing dinner for the evening.”

One major challenge is how to maintain a viable soup program in warm weather and create a 52-weeks-a-year destination. When the temperatures soar, delis can increase sales by promoting soup as a quick and easy dinner alternative. Since it requires minimal cooking, kitchen temperatures are not impacted.

“While there’s definitely seasonality in soup sales, there are many ways retailers can keep their shoppers interested in soup the year around,” says Kurkjian. “While our suggestions are always specific to the parameters of individual retailers, some examples include bundling soups with salads or sandwiches, regularly rotating a sub-set of SKUs to include varieties with season-appropriate ingredients, and providing recipe suggestions that allow shoppers to use the soups as an ingredient in preparing different seasonal meals.” Kettle Cuisine offers several soups served chilled, including strawberry champagne soup, green pea and mint soup and roasted beet soup.

Blount manufactures and markets gazpacho, a refreshing low fat, gluten-free soup, with fewer than 150 calories per serving. “It’s ideal for catching the shoppers on the warm days of spring and summer. It can also lead to additional sales when the customer pairs the soup with a favorite sandwich or salad,” says Sewell.

“Seasonal soups can help keep the offerings exciting, even in the off season. It’s all about making the most of each season by taking advantage of ingredients that flourish during different times of the year,” states Jodway.



PHOTO COURTESY OF SELECT STORE BRANDS

other because the consumption occasions for the two formats are meaningfully different. Hot soup is almost always consumed immediately or within hours, whereas chilled soups are most commonly consumed the next day or two. “Years of following consumer behavior in this category suggest that you can build great shopper trial with a hot offering and build great

shopper loyalty with a chilled program,” Kurkjian explains.

Sandridge sees growth in both hot refrigerated soups. Consumer demand means increasing numbers of retailers are offering fresh soups in both formats. “The shelf space is expanding, not just in the grab-and-go but in the prepared-foods section of the stores,” says Jodway. “Retailers



PHOTO COURTESY OF KETTLE CUISINE

Merchandising Opportunities

Cross-merchandising can be an effective tool for building soup sales throughout the year. Breads, salads, or other side dishes available near the soup case can make complete meal solutions fast and easy. Featuring a cup of soup with a half sandwich or a small salad, as many restaurants do, can build deli sales, especially in warmer months when consumers are looking for lighter fare. A blackboard or easel stand can offer two or three combinations each day.

Jodway suggests merchandising soups such as Sandridge's Lobster Bisque or Herbed Tomato Bisque as a gourmet-ready sauce to be paired with fresh pastas. Signs that read "Dinner in minutes, just heat and enjoy" would communicate this convenience and engage the shopper.

Many manufacturers offer training and educational materials for deli staff. Blount provides food safety handling instructions and creates a training blueprint for supermarkets through field visits. Sandridge provides heating and storage guidelines for each soup as well as repurposing ideas to prepare specific dishes. Kettle Cuisine tailors its assistance to the needs of each customer. Training programs are offered in either written or video forms.

"We find delis need training for their operators unless you provide items that are simple to use, while still providing high quality. We feel we do a lot of the work for the operators at our plant," states Select Brands' Ray.

Point-of-sale (POS) programs are also important. Sandridge provides soup kiosks,

signage, product tags and other POS items to grab consumers' attention. It also develops simple inviting phrases for delis to use in promotional materials and can design a soup calendar for its deli customers.

"In regard to POS materials, every situation is unique. Most operators have internal marketing departments with which we work closely to supply art work, messaging suggestions and best practice guidelines," reports Kurkjian of Kettle Cuisine.

Blount provides in-store signage and QR (quick response) codes to download the latest soup recipe ideas and pairings to smart phones. "We also offer soup rotation suggestions based on region, how to merchandise soup effectively, and how to develop a hot-to-go program to coincide with retail soup products," adds Sewell. **DB**

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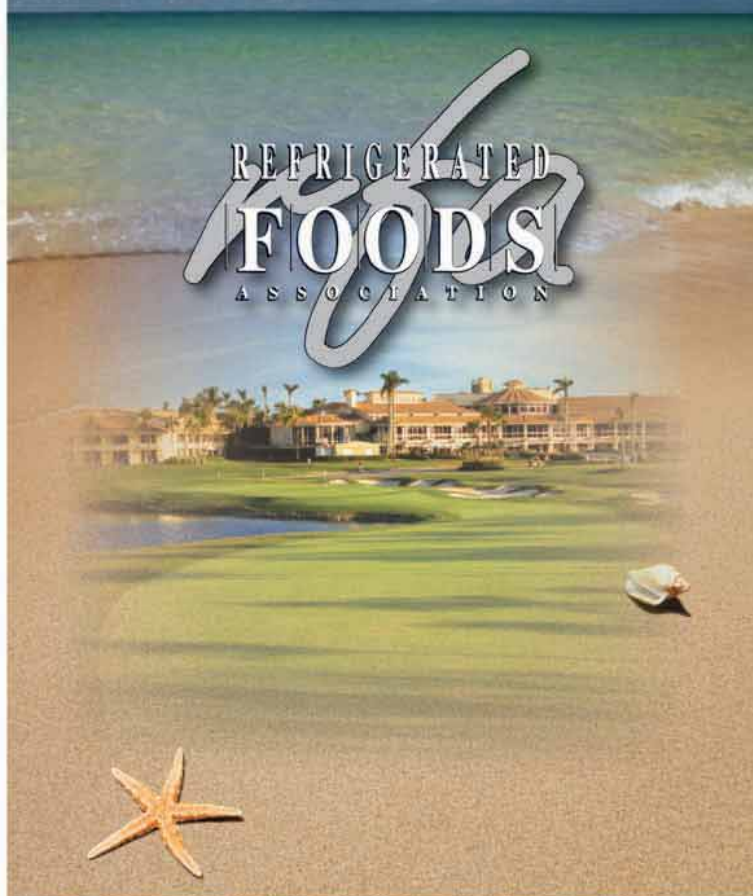
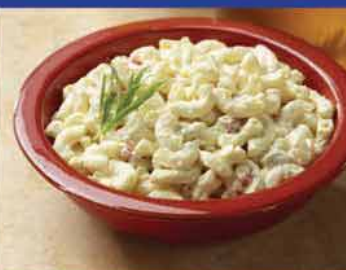
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Merchandising Mozzarella

Ways to build sales of this most versatile cheese

BY PATTI ORTON

Mozzarella sales tend to gain ground as the days grow longer and the temperatures get warmer. To maximize Mozzarella sales, it's essential to go outside the cheese department and shake up the merchandising.

John Stephano, director of marketing and training, Atalanta Corp., Elizabeth, NJ, believes there are two levels of Mozzarella merchandising. "The first level is balls or logs merchandised in the cheese department, piled high, maybe some crackers, and that's it. Level two is Mozzarella in the produce department with tomatoes on the vine, basil, sea salt and the highest quality olive oil." Level one promotes the cheese; level two promotes an application of the cheese.

"Retailers have to do this, but so many still are not.

"Level two merchandising," he explains, "is about getting cheese away from the traditional cheese case display and getting it where it belongs — with other food. It's a fundamental shift between a pairing display and a 'culinary application display.'" The latter, he claims, sells "an ultimate combination of flavors.

"In prepared foods, skewers merchandise beautifully. Why aren't we taking rich, orange, ripe cantaloupe, prosciutto di Parma and Mozzarella and selling kabobs in this department?" he asks. "If you don't have Mozzarella in the bakery in autumn, you're making a mistake. Crostini, melted Moz-

zarella, honey and caramelized walnuts — can you imagine the smells coming from the bakery?"

Stephano acknowledges transitioning displays to level two requires "passion for the culinary application."

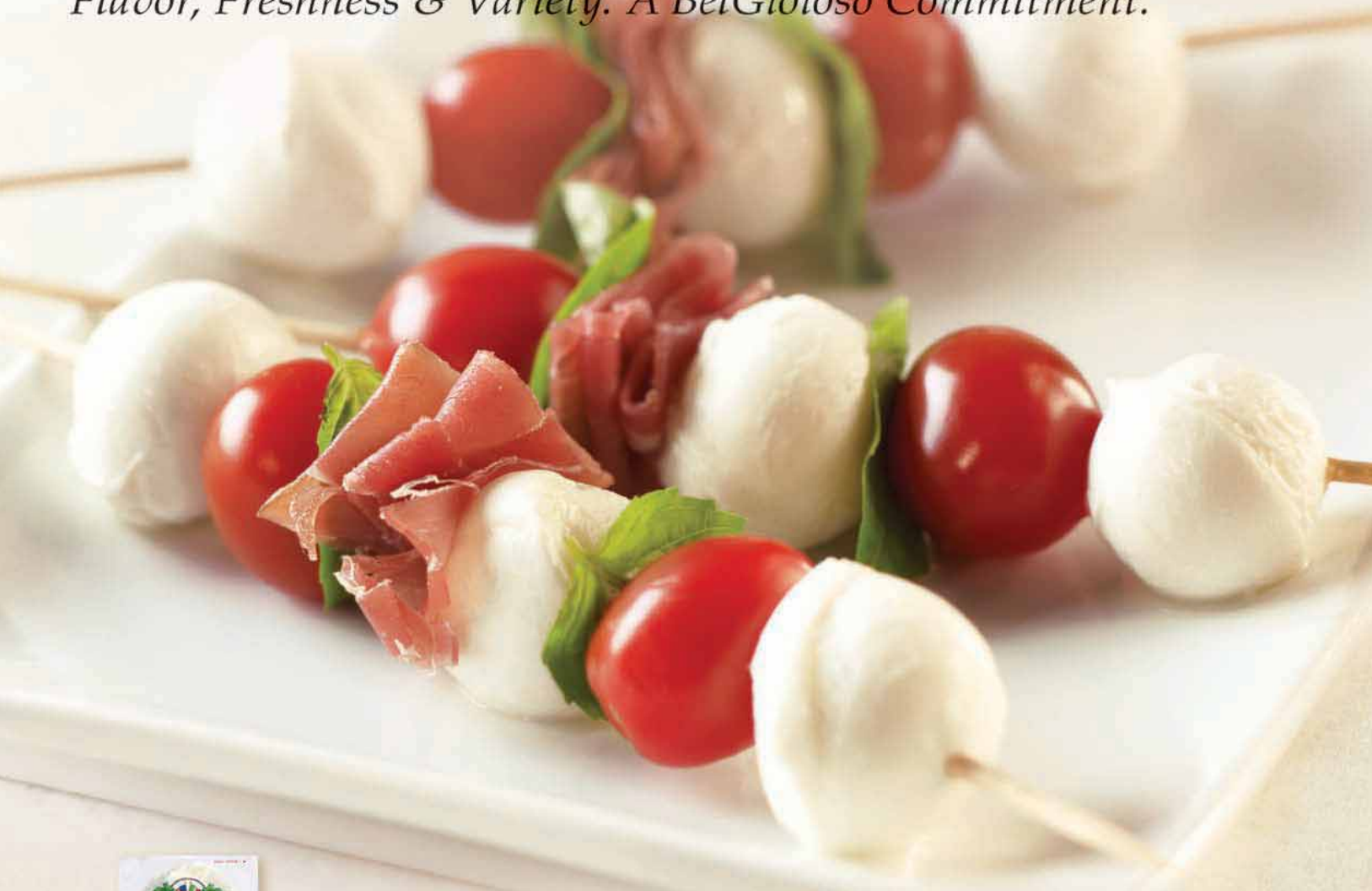
Education and training can serve as kindling to develop that passion. According to Lino Esposito, general manager at Belfiore Cheese, Berkeley, CA, the first thing retailers need to know and teach is don't eat Mozzarella cold. As with most cheeses, flavors are heightened at room temperature. Training employees leads to a special kind of service Esposito calls an added value. "Offering a pure product and providing the service to the customer is very precious."



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PHOTO COURTESY OF MOZZARELLA COMPANY

"The retailers need to know what they are selling," advises Andres Salazar, managing director of Annabella Creamery, Boulder, CO. "There are many different kinds of Mozzarella from industrialized to artisanal to water buffalo."

Salazar says retailers and consumers need more education, especially for the water buffalo Mozzarella his company makes. One misconception he runs into is that the product is seasonal. "We have full production year round," he counters. "If consumers like water buffalo Mozzarella, then they're going to buy it any time of the year. I think training is the most important, whether it's the sales team at the distributor or at the store."

Story cards — not be confused with recipes cards — next to a featured cheese can be a helpful educational tool, states Johann Englert, founder and co-owner of Maplebrook Fine Cheese, Bennington, VT. Story cards give information about the creamery, the animals and the people who make the cheese, she explains.

Francis Wall, vice president of marketing, BelGioioso Cheese, Green Bay, WI, says demos put training dollars to work. "As popular as fresh Mozzarella is, there are still a lot of people who don't know what it is or how easy it is to work with." To develop this under-tapped market, he recommends offering samples in the produce department next to the tomatoes and basil — once again outside the cheese department.

Merchandising Tips

"Retailing is a special art," states Fiorella Cutrufello, sales and marketing executive at Calabro Cheese Corp., East Haven, CT. "Because Mozzarella is a white cheese, it can easily be lost in a display if not done well. You must build contrast." She often reaches for a large, black lacquer plate as a canvas. "Fresh Mozzarella really pops against this surface."

Belfiore's Esposito adds color based on what draws the eye. When teaching others how to construct a display, he takes trainees to the fresh foods department to select what appeals to them. "It's such a mild cheese, it will work with most fruits and vegetables."

Merchandising "sends a message to your stomach," he says. "The No. 1 question to ask about a display is, 'Is that appealing?' When done properly, customers are more invited to buy, because we're animals — trust your instincts." He recommends setting up displays at noon "because that's when the body is looking for food. Don't do it after coffee in the morning, because it won't work."

Retailers may offer several different formats of Mozzarella, such as cupped in liquid, thermo-form logs, sheets and balls. How can



a retailer build an eye-appealing display with so much variety? Wall advises common sense. "Match the size of the ingredients. For example, if a display calls for grape tomatoes, pair it with ciliegine [cherry size balls of Mozzarella]," he explains. "If you're fanning melon slices, match it up with slices from a log." Wall encourages photography to connect the dots. "Show the application," he emphasizes. "Customers will get it."

"What is merchandised with the cheese,"

says Salazar, "should be suggestive of how to use it."

Merchandising outside the cheese department is less complex than many retailers think; it doesn't even require electricity. "Mozzarella can be packed in tubes and stuck down in crushed ice next to bin of beautiful, ripe, juice tomatoes and fresh basil," suggests Paula Lambert, owner and founder, Mozzarella Company, Dallas, TX.

Beyond Tomatoes and Basil

What makes Caprese salad so popular is that it's colorful, fresh, healthy and easy. But, Salazar explains, customers need to know how versatile this cheese is beyond Caprese salad. "This cheese can be added to entrées such as risottos, ravioli, sandwiches and pizzas," he explains. "And for dessert, do buffalo Mozzarella sprinkled with lavender sugar and brûléed. It's endless."

To put it another way, Stephano says, "What's cool about Mozzarella is it's a vehicle for flavors."

The Mediterranean bar offers a universe of complements. "Pepper strips, artichokes, eggplant, portobellos, and kalamatas all go great with ciliegine in a pasta salad," says Wall. "Or stuff Peppadews with pearls and add to a pasta salad or a green salad."

Another fresh idea is cross-merchandising fruit. Peach Caprese Salad is a new take on the traditional version, according to Wall. "Serve peach and Mozzarella slices on a bed of greens, and add a few raspberries and blueberries for color."

Mozzarella is not just for salads and not just for summer, says Cutrufello. For breakfast, she suggests pearlina with blueberries. In wintertime she folds it into cooked squash and pumpkin. Using Mozzarella in new ways ignites conversation. Something as simple as green peppercorns freshly cracked over Mozzarella is a gastronomic sensation, she notes. "People don't know what green peppercorns are, so they come closer and ask, 'What's that?'" She then describes the spice as a slightly sharp, aromatic, and somewhat Indian flavor. "So we're talking about green peppercorns and end up selling lots of Mozzarella — and green peppercorns."

Esposito cautions against pairing fresh Mozzarella with strong, acidic foods. Even though it's popular, he finds balsamic vinegar "a killer. Taste is personal," he admits, "but I avoid this. It's too overwhelming."

The shopper has anywhere from five to 10 choices of where to shop, Stephano says. "It's imperative retailers do everything they can to make sure their store is the consumer's first choice." Employing new merchandising strategies for Mozzarella is a sound first step.

DB

Variety, Versatility and Value

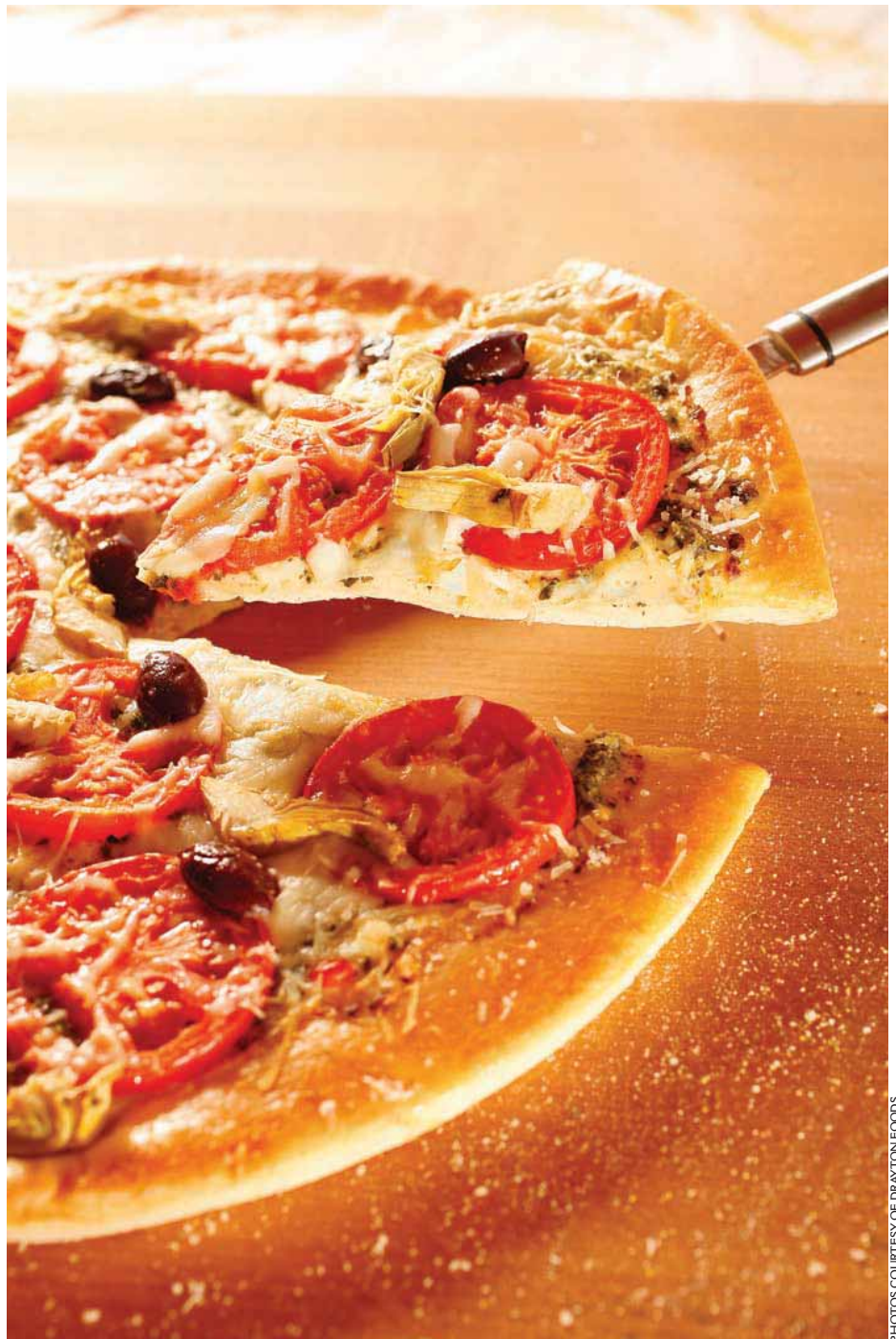
The keys to a successful deli pizza program

BY CAROL M. BAREUTHER, RD

A whopping 97 percent of adults ate a slice of pizza last year. Kids three to 11 years old claim it as their favorite food for lunch and dinner. No sides are required to make it a complete meal. No wonder the U.S. pizza market topped \$40 billion in 2012, according to Packaged Facts' September 17, 2012-released report *The Pizza Market in the U.S.: Foodservice and Retail*.

According to Harry Balzer, chief industry analyst and vice president of NPD Group, Port Washington, NY, "Pizza has become a great American food. The single biggest change we've seen is in consumption. I ate more pizza in my 20s than my parents, and my children now in their 20s are eating more than I when I was their age. Pizza's popularity seems to know no bounds. However, what will ensure growth in the category is anything that makes it easier and cheaper."

It's certainly simple to buy pizza. Options abound including eat-in, take-out and home-delivery from foodservice, and frozen, hot-to-go and take-and-bake at retail. The frozen segment, which dominated with an esti-



PHOTOS COURTESY OF DRAYTON FOODS

mated 84.8 percent of the \$5.3 billion retail pizza sales in 2012, is experiencing dollar sales declines as recession-weary consumers migrate back to restaurants. The bright spot at retail is take-and-bakes, which represented only 3.4 percent of sales last year but is forecast to grow continuously through 2016, according to Chicago, IL-based Mintel's July 2012-released *Pizza at Retail*. Deli operators can cash in by making take-and-bakes as well as hot-to-go pizzas convenient and attractive to quality-conscious shoppers through three key strategies: variety, versatility and value.

Variety: Let Consumers have it their way

Consumers don't simply buy pizza; they buy their pizza, according to *Pizza at Retail*. Eight out of 10 consumers surveyed say specific toppings or flavors are the most important determinant for their pizza purchase. Jim Viti, vice president of sales and marketing for Delorio's Frozen Dough Products, Utica, NY, notes, "Variety used to be a nice plus. Today it's expected. Variety is king."

Everything from pepperoni, supreme and 5-cheese to Hawaiian-style take-and-bake pizzas are available to consumers shopping at Safeway, a 1,600-plus-store chain headquartered in Pleasanton, CA, as part of the retailer's Signature Café deli selections.

Pepperoni, sausage and combo are the three top sellers, says Frank Pocino, Sr., CEO, Pocino Foods Company, CA. "We're seeing trends for diced ham, pepperoni and salami rather than sliced for better coverage and use of pork roll in place of ham to lower the cost. Chorizo is a topping that's being used more in regional markets, especially those with large Hispanic populations."

Asian-style pizzas made with chicken, broccoli and duck sauce as well as Greek-style pizzas with spinach, Feta and kalamata olives are other regional ethnic trends.

Fruit and vegetable toppings are more prevalent on pizzas today, says Pocino. "The biggest problem in a pre-topped program is that some fruits and vegetables can discolor the meat. For example, pineapple can discolor ham. In addition, vegetables are highly perishable and will cut shelf life on a pizza to one to two days."

In considering variety offerings, deli operators need to think more like pizza restaurant managers, advises Alan Hoover, general manager of Jane's Dough Foods, a division of Donatos Pizza, Columbus, OH. "As consumers' palates become more sophisticated, the need for strategically sound product development becomes critical. Higher-end gourmet toppings and flavors will become more prevalent."



PHOTO COURTESY OF KINGS SUPER MARKETS, INC.

One retailer that has capitalized on upscale pizzas to the delight of consumers is Kings Super Markets, Inc., a 27-store chain based in Parsippany, NJ. Neapolitan-style pizza selections, which are cooked in an 800° brick-lined oven, span from a classic Margherita made with San Marzano tomato sauce, fresh Mozzarella and fresh torn basil to creative selections such as spinach and eggplant, chicken Parmesan, white clam, shrimp pesto, mushroom truffle, squash, prosciutto, and pear and Blue cheese. Scott Zoeller, senior director of deli sales and merchandising, says, "Store made hot-to-go has been a huge win for Kings. Simple, authentic, thin crust, fresh ingredients, made to order."

Health-conscious consumers are now shopping the pizza case, says Hoover. "Thin crust remains the most preferred with a 38 percent share. In addition, crust types present a bold new palette that we can use to develop new product offerings — multi-grains, whole-grains and gluten-free."

Nearly one-third of Americans are concerned about gluten, says the NPD's Balzer. "Offering a gluten-free option eliminates the veto vote or exclusion of the one person in a group or at home who can't eat gluten."

The gluten-free market is exploding, notes Jimmy DeSisto, president of the El Segundo, CA-headquartered Venice Bakery, makers of gluten-free pizza crusts in plain and seasoned varieties in 5-inch personal and 12-inch family sizes. "The big caution with a

gluten-free pizza program where crusts are topped in-store is cross-contamination. That is, the possibility of a gluten-free crust touching a work surface used to top regular wheat crusts. That's why we suggest a private-label pre-topped program. These are topped, wrapped, sealed, labeled and frozen in a gluten-free facility. The deli has only to thaw out enough for a day and stock the take-and-bake case. This type of program also keeps shrink low."

There are a number of gluten-free toppings, adds Viti, who notes Delorio's will introduce a fully prepared, pre-wrapped gluten-free pizza in a disposable pan during the first half of the year. "These include vegetables and cheeses such as spinach and Feta."

Beyond gluten-free, says DeSisto, "We see the organic refrigerated pizza segment growing 15 to 20 percent over the next year or two."

Versatility: Merchandise in Many Ways

An expanded pizza and pizza products program can generate deli sales. Pizza bagels and pizza bread represented 11.4 percent of total deli pizza sales for the 52-weeks ending Nov. 24, 2012, according to the Nielsen Perishables Group, Chicago, IL, while calzones and stromboli represented another 2.1 percent in sales.

According to Viti, the trend right now, especially where freezer space is at a pre-



PHOTO COURTESY OF VENICE BAKERY

mium, "is to buy raw dough and use this one product to make others such as pizza crusts, breadsticks, garlic knots, dessert pizzas and savory or fruit stuffed calzones."

Drayton's Cash acknowledges the trend,

noting "We sell a dough ball in a bag in traditional, light, whole wheat, and garlic and herb flavored that operators can thaw as they need and use in a variety of ways."

One national retailer has taken this idea

to the next level by selling a private-label dough ball that it merchandises in the refrigerated case adjacent to parbaked crusts and cross-merchandises with sauce, cheese and other toppings as part of a component program. It also display the ball next to pre-topped take-and-bake pizzas.

Venice Bakery offers dough balls for retail sale. "Our product is one pound and comes with on-pack recipe suggestions," explains DeSisto. "For example, you can roll it out to 12 inches for a thick crust or 16 inches for a thin crust."

Another smart merchandising method that reduces shrink on take-and-bake pizzas is to convert them into hot-to-go or by-the-slice programs. While whole (hot and cold) pizza contributed 66.4 percent of deli pizza dollar sales for the year ending Nov. 24, 2012, according to Nielsen Perishables Group data, slices represented another 10.6 percent.

"Many supermarket delis will buy blanks [untopped crusts], top in-store and merchandise in the refrigerated case up to four days," says Cash. "What doesn't sell they bake off and merchandise hot. There are two benefits of offering a hot program in addition to cold. One, the aroma of fresh baked pizza can pull consumers right through the store and into

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the deli and generate impulse sales. Two, delis can promote that they can bake off a pizza to order while a consumer is shopping as an added service.”

Hot pizza sells best during the dinner day-part or from 3:00 to 7:00 PM on weekdays, says Delorio’s Viti. “Outside of these

hours and on weekends, the refrigerated take-and-bakes are more popular.”

Value: Promotion Works

Consumers clamor for freshly made 19-inch cheese pizzas when they’re on sale for \$6.99 each in the fresh food and bakery department at Market Basket, a 69-store chain based in Tewksbury, MA. Offering real value in a deli pizza program is a great way to boost sales.

Here are a few ideas for promoting value.

Offer private label, says Drayton’s Cash. “Sales of refrigerated pizza at retail are growing 1.5 to 2 percent annually while sales of refrigerated private-label pizzas are growing annually at 2.5 percent — and we expect this to continue to 2015. Driving this are consumers who feel the private-label product offers the same quality as branded but at a lower price.”

Grab impulse sales by displaying empty pizza boxes at the front entrance of the store, suggests Viti. “On top of the boxes, put a coupon for breadsticks or a liter of soda that consumers can redeem by taking their box to the deli. Then, 15 to 20 minutes later the consumer can go back and pick up their fresh baked pizza. They may not have thought of pizza when walking into the store, but they do after seeing the boxes and coupon offer as a reminder.”

Take a cue from convenience stores. Run a contest for consumers to submit their favorite pizza recipe with the incentive of receiving a free pizza. The winning pizza can then be made in store and offered on promotion for a week or month.

Call out to kids and their parents on a busy Saturday with a top-your-own-pizza

promotion. Stock the deli with 7-inch par-baked pizza shells. Let kids request two or three toppings from a defined selection. These might include co-branded products as part of the promotion or new types of meat or cheese toppings the deli wants to introduce. Deli personal can portion out the ingredients, let kids place them on their personal pizza and then bake the pizza. To make the promotion more of an event, the chain’s registered dietitian can be on hand to answer questions or make suggestions to parents about healthy eating. It’s a great way to pull shoppers into the store, plus kids get to play with their food and enjoy a hot lunch while their parents shop.

Place pizza on sale creatively, suggests Cash. “Pick one or two days of the week, preferably weekdays when moms have less time to cook, and go head-to-head on price with one of the major QSR chains. For example, sell a 16-inch for \$7.99 or \$8.99. Don’t worry about the margin. The whole idea is to drive increased food traffic into the store and deli.”

Address the events that drive product sales, says Jane’s Hoover. “That is, promotions that tie to holidays such as Halloween or New Year’s or events such as the Super Bowl, March Madness, football bowls and playoffs.”

Finally, follow in the footsteps of QSR pizza restaurants by promoting pizza — take-and-bake or hot-to-go — as part of a meal deal, recommends Viti. “Bundle everything in one place and for a set price. You can include appetizers such as chicken wings, the pizza and a dessert or beverage. Then use the power of social media to call out, for example, Wednesday is Pizza Day. It puts the idea in people’s minds.” **DB**

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A Butcher's Guide to Deli Roast Beef

Cuts, grades and processing are the major factors

BY BOB JOHNSON

Behind the detailed information about USDA grades of meat — the extent to which a cut is marbled, the flavor and mouth appeal of a slice of roast beef — it all comes down to the animal and how the animal used a particular muscle.

"The part of the animal determines the tenderness, flavor and bite," says Guy Giordano, president and CEO at Vincent Giordano Corp., Philadelphia, PA. "It's all about which muscle. The more the animal uses the muscle, the tougher the meat. If you just roasted a piece of shoulder bottom round, it would be too tough. You don't want a deli

roast from the shoulder, as opposed to the top round. Chuck roast is tougher because it's the shoulder. High-end roast is from the rib. The rib is tender and more flavorful," Giordano explains. "The cap-off top round is standard in the deli. You get a better, more uniform slice. The yield is not as good with the cap on."

Beef round tip roast is a wedge-shaped cut from the thin side of round. It contains cap muscle of sirloin and is usually prepared by braising or roasting. The advantage of removing the cap is that it makes the roast easier to slice uniformly.

The part of the animal from which the cut comes is a major determinant in marbling, which in turn is a major determinant of the grade. The difference between value and high-end beef starts with the grade. From low to high, the grades used for roast beef are Select, Choice and Prime. Beef producers pay for USDA quality inspection, which is not required. Beef not submitted for grading, usually because it's below the U.S. Select standard, is generally sold as no-roll.

The higher USDA grades translate into roast beef with superior mouth appeal in a number of ways. "The higher grades are a lit-



tle more marbled, more tender and more flavorful,” says Louis Eni, CEO of Dietz & Watson, Inc., Philadelphia, PA.

Less than two percent of carcasses earn the U.S. Prime grade, which signifies a fat content that makes for well-distributed marbling. Prime beef has 8 percent or more intramuscular fat, and marbling that ranges from abundant to extremely abundant. USDA Prime beef is seldom, if ever, sold at the deli.

“It’s just not available. And most of the time prime is very expensive, and retailers are trying to keep the deli price down,” says Todd Hays, director of sales for deli and food service at Tyson Foods, Springdale, AR.

“There’s so little prime on the market that you won’t see it in the deli,” says Eni. “Most of the high-end meat in the deli is USDA Choice, and most of the low-end beef is utility cuts. I would imagine prime ends up in high-end restaurants.”

A slight majority of beef earns the U.S. Choice grade, which is the highest quality likely to be found in most delis. Choice has from 4 to 8 percent intramuscular fat and marbling that ranges from moderate to small. U.S. Select grade, the lowest graded quality commonly sold at retail, is less tender and flavorful than Choice. Select has from 3 to 4 percent intramuscular fat and slight marbling.

“Typically, most delis use either a Choice or a Select. There can be quite a bit of difference in price between Choice and Select; it can be 30¢ a pound, and it can be 60¢ a pound,” Hays says.

The marbling sets the grade but the price for a cut of beef is set by a combination of demand — based largely on its mouth appeal — and supply — based largely on how many pounds of that cut are on the animal. “First-cut brisket might weigh just four pounds, while top round might be 16 pounds. When you have higher demand and less supply, the cost is higher,” adds Giordano of Vincent Giordano.

Quantity Or Quality?

It would be comforting if one could have both quantity and quality, but that combination seldom exists in the real world. Whether beef is injected, and by how much, in order to increase the quantity is an important quality distinction. A number on the label tells the degree to which beef is injected, and that number is an important index of quality.

According to Jim Dickman, CEO of Charlie’s Pride, Vernon, CA, “One way we distinguish it for the consumer is [to say] a lower pump product is better quality. Manufacturers cure the product, marinate the product. With beef, they use isolated soy protein, binders that keep the water in the beef. It keeps the product moist. The injection



THE PART OF THE ANIMAL FROM WHICH THE CUT COMES IS A MAJOR DETERMINANT IN MARBLING, WHICH IN TURN IS A MAJOR DETERMINANT OF THE GRADE. THE DIFFERENCE BETWEEN VALUE AND HIGH-END BEEF STARTS WITH THE GRADE. FROM LOW TO HIGH, THE GRADES USED FOR ROAST BEEF ARE SELECT, CHOICE AND PRIME.

tion levels can be as high as 30 to 35 percent, but a 10 percent or less injection level — or pump — is considered a high standard.”

Injection involves a tradeoff between the amount of meat and the quality of that meat. “For the lower-end products, they’re adding protein and injecting water into the meat. You can pay for water and protein, or you can pay for beef. There are no tricks,” Giordano notes.

Beef that has been injected, frankly, has a different mouthfeel. According to Eni, “An important difference between premium and lesser quality beef is whether it’s been injected. If you inject it you get more meat, but beef does not take well to salt. It gives it a hammy texture, not a tender mouthful compared to non-injected or marinated.”

All-natural is a widely used, rarely defined concept but when it comes to beef, it can



PHOTO COURTESY OF CHARLIE'S PRIDE

translate into better flavor and better nutrition. The ingredients used to process the meat are important.

“With all-natural beef, there are no artificial ingredients in the processing. The USDA does not allow sodium, phosphates or nitrates in all-natural meat. Ours just has seasoning,” Eni continues.

The deli can take steps to improve the edibility of value cuts of beef and to improve the affordability of meals built around smaller portions of premium cuts of beef. “Beef historically has price/margin obstacles,” says chef Dan Zakri, manager for new product development at Sandridge Food Corporation, Medina, OH. “Try slow cooking less expensive cuts of beef. Pair the protein with rice, grains, or other sides that can assist in reducing portion cost, as well as build ethnic or layered flavors.”

Providing value is vital in merchandising deli beef in the current economic climate. “The most important thing is to stay on top of what’s going on in the restaurants,” advises Hays. “People are looking to the deli for meal replacements and meal ideas. Try to hit certain price points to give value to the consumer. Restaurants have done a good job of bringing prices down. Some delis are trying

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to bring the price down from \$6.99 to \$4.99 [a pound].”

Specialty Meats For Special Consumers

Specialty meats appeal to a relative handful of consumers, but if those consumers are part of your customer base, they will notice whether you offer those meats.

One producer is finding deli markets for American Kobe beef, an exclusive product

that must meet exacting breed and animal treatment standards. “We have many accounts nationwide that are using Snake River Farm Charlie’s Pride Kobe beef. It’s primarily distributed in the deli, and there is a world of difference,” says Dickman of Charlie’s Pride. That difference costs about an extra dollar a pound compared to other very high-end deli beef.

Niche markets for other types of high-quality beef also exist. “There’s a little inter-



It would be comforting if one could have both quantity and quality, but that combination seldom exists in the real world. Whether beef is injected, and by how much, in order to increase the quantity is an important quality distinction. A number on the label tells the degree to which beef is injected, and that number is an important index of quality.

est in grass-fed beef, but I don’t think it’s significant nationwide. The grass-fed is important if your customer base thinks it’s important,” Dietz & Watson’s Eni notes.

The story is similar for organic beef, which has a relatively small but loyal consumer base. “A small percentage of people are willing to pay the extra for organic beef. You’re seeing a little of the organic in the deli, but it’s so expensive I don’t think it’s significant nationally,” Eni adds. One reason organic beef is so expensive is that not only must the animal be raised to organic standards, but the feed must also be grown to organic standards.

The upper end of roast beef likely to be found in most delis is certified Angus Choice top round. “People consider the animal and the cut to be the best,” according to Giordano of Vincent Giordano. The Certified Angus Beef designation was started by the members of the American Angus Association, now 35,000 ranchers strong, to promote the quality of their breed of cattle. It worked.

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Blast From The Past



Sartori Company

The picture on the right was taken in Plymouth, WI, in 1942, at S&R Cheese Corp., which had been founded in 1939, by Paolo Sartori (shown on left at age 24 in a picture taken in 1907) and Louis Rossini. The bareheaded man seen at the back of the row of men is Joe Sartori, father of current CEO Jim Sartori. On this day, Joe was working in the plant with the team making cheese. The process was completely hands-on, a truly artisan endeavor. Many of the techniques and methods used back then are still used today. Each wheel of cheese is individually handled and each batch is tested for quality in a small plant Antigo, WI.



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Drayton Enterprises, LLC	36	Pizza Dough	701-277-9947
European Union	13	Cheese & Prosciutto	
Farm Ridge Foods, LLC	17	Pickles	631-343-7070
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