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Menu innovation in the breakfast daypart leads the charge for industry growth

Morning Menu Gets Lean

Hatching Innovative Egg Dishes

Waking Up to Variety

TYSON FOOD SERVICE

A Lean Fit for Breakfast

Leaner proteins offer consumers more choices and increase sales for the breakfast segment

The morning meal continues to drive growth across all restaurant segments and has grown each year since 2007, according to MenuTrends Direct from Datassential, a food industry market research firm.

Quick service maintains the largest share of breakfast menus overall, with a healthy 3 percent growth. Casual dining continues its push into the breakfast/brunch segment, and breakfast appears at 16 percent more restaurants than in 2007.

Breakfast was the only daypart that grew during the recession, and it is predicted to be a \$33.4 billion business by 2015, outpacing food-service industry growth by 2.3 percent overall. Furthermore, breakfast visits to restaurants show a 4 percent growth since 2012, and they've completely recovered to pre-recession rates.

"Breakfast continues to be the daypart driving industry growth. This hasn't changed much since the beginning of the recession," says Maeve Webster, senior director at Datassential. "Breakfast continues to be the biggest value by daypart, with items typically costing less without significant losses in portion size, while still offering operators attractive profit margins."

Consumers realize the importance of protein in their diet, and protein remains an important component of the morning meal. Choosing a leaner protein is top of mind for many health-conscious consumers.

While no one is suggesting that eggs, bacon, and sausage will disappear from the morning meal, poultry items are pushing their way onto the plate. Turkey offers a nutritious and tasty way to cut fat and calories when compared with some other breakfast protein choices. For example, turkey sausage and turkey bacon offer a spicy and tasty way to add a leaner product, replacing traditional bacon or pork sausage. In addition, turkey can be a perfect protein component for breakfast sandwiches and other handheld items. Breakfast sandwiches are the top menu item for the daypart in quick service because of their portability, and among the top five breakfast items in other segments. Turkey appears in nearly 13 percent of all breakfast sandwiches.

Consumers also think there's a lack of turkey options on the breakfast menu—nearly two-thirds of consumers say restaurants should use



Consumers realize the importance of protein in their diet, and protein remains an important component of the morning meal.

more turkey, and 55 percent would like to see turkey bacon and sausage on breakfast menus more often, according to Technomic Inc., a research and consulting firm to the foodservice industry.

Turkey is gaining ground at breakfast—24 percent of consumers say they've been eating turkey at breakfast more than they were two years ago. Breakfast items with turkey increased on full-service restaurant menus by 8 percent in 2012. That may be because of the healthier perception patrons have of turkey. More than three-fifths of consumers believe that poultry items are more healthful than beef or pork, and most say health reasons are why they choose turkey more

often for breakfast at restaurants and retail.

By offering more turkey products on the breakfast menu, operators can give health-minded patrons more to love in the morning, says Richard Jenkins, director of foodservice marketing at **Butterball**.

Common options include turkey sausage links, perfect for platters or à la carte; turkey sausage patties, great on sandwiches or crumbled up in recipes; and turkey bacon, which can be added in recipes or served up beside favorite items.

In addition, offering turkey breakfast sausage and turkey bacon as options next to traditional meats on the à la carte menu can increase customer choice. They're each available for breakfast sandwiches, too.

"Turkey sausage offers great flavor and bite with less fat than pork," Jenkins says. "That's why it is finding its way onto the breakfast menu."

For example, pair sliced turkey with egg whites and skinny bagels to attract consumers on the go. Above all, Jenkins says, get creative with turkey on the breakfast menu to keep the early crowd coming back for more.

A key to spiking sales of many menu items is branding, Jenkins says. "Letting customers know that your turkey is the Butterball brand can boost

sales,” he says. “It’s proven that branded products sell better.”

While many consumers choose turkey for health concerns, they also care a lot about flavor and having a variety of options, which means operators have room to be creative, too.

Butterball offers menu ideas for upscale turkey dishes, including Turkey Stuffed Crêpes stuffed with turkey and Gruyère, grilled to melt, and served with chive and tomato scrambled eggs. Creamed Turkey, served over herbed biscuits with wild mushrooms, provides a healthy twist on creamed chip beef. A grilled thin-crust flatbread can be topped with dollops of Boursin cheese, scrambled eggs, chopped turkey bacon, diced tomatoes, and sliced avocado for a breakfast flatbread dish. Sun-dried tomato tortilla with scrambled eggs, turkey bacon, spinach, tomatoes, avocados, and Jack and Cheddar cheeses can be used to make a Scrambled BLT Wrap.

“Menu options like these offer operators a chance to give their customers a fast-casual experience, even in quick service,” Jenkins says. “Increasingly, operators are using turkey in new and different ways.”

Jennie-O Turkey Store has combined the wake-me-up flavor and texture of traditional-style breakfast sausage with the better-for-you nutrition of turkey in two premium sausage patty varieties. Operators can choose either a 2-ounce raw or convenient 1.5-ounce fully cooked patties. Both are ideal for anything from breakfast sandwiches to egg platters, and they meet customer demand for flavorful items that are also more nutritious. Turkey sausage has 40 percent less calories and 50 percent less fat than pork sausage links,

according to data from the U.S. Department of Agriculture. Turkey sausage grew 24 percent on breakfast menus since 2011, according to Datassential.

Turkey Breakfast Sausage Links are a delicious way to start the day with a no-gluten product.

Jennie-O Breakfast Sausage Links deliver the traditional sausage flavor patrons love, along with the benefits of turkey they seek. The popular 1-ounce sausage link now has an even better flavor and texture than before. It’s the perfect choice when you want to serve a smaller portion. For larger portions, Jennie-O has taken this new and improved sausage link and doubled its size to 2 ounces for plate-filling appeal.

Jennie-O also offers turkey bacon in both a traditional format as well as fully cooked, pre-crisped bacon, perfect for breakfast, sandwiches, or any other applications. Turkey bacon market penetration has increased over 50 percent since 2009 and 20 percent from 2011. Customers love the taste of bacon but also are concerned about their intake of fat and sodium. Jennie-O fully cooked Turkey Bacon offers a great alternative. It has between 60–80 percent less fat and 45–60 percent less sodium than pork bacon, depending on the variety chosen.

Sausage remains a popular breakfast protein, appearing on nearly 40 percent of restaurant menus across all segments, according to Datassential. For many consumers, the spicier, the better, and ethnic tastes such as chorizo offer a great alternative to traditional sausage.

Hormel Foods introduced its Fast ’N Easy Chorizo Patty, a fully cooked, bold and spicy Mexican sausage that provides menu differen-

tiation and expanded revenue opportunities for operators.

“Supported by the demand for bold flavors, this product will serve as an appealing way for operators to easily incorporate this authentic flavor profile into their current menu,” says Bill Dion, product innovation team leader at Hormel Foodservice.

“Our research indicates that chorizo is gaining momentum across the industry and customers are seeking out spicy menu options—especially at breakfast. Our Chorizo Patty is easy to execute and extremely profitable for operators,” he says. “A breakfast sandwich or menu item using the chorizo patty can support a slight menu increase of 10–50 cents when compared to using a traditional sausage. The price increase provides additional profit potential for the operator.”

In addition, the Fast ’N Easy Chorizo Patty can transition from a traditional breakfast sandwich to a spicy patty melt for lunch and into a wrap for an on-the-go snack. It provides on-trend flavors for all dayparts to keep customers interested.

The patty is fully cooked, all pork, all natural, and filled with flavorful, authentic spices and seasonings. There are no preservatives, additives, or artificial ingredients.

There are some alternatives that blend vegetarian ingredients with protein to offer consumers a viable menu option.

Hormel Foodservice also introduced the Hormel Fuse Burger line. These fully cooked patties are a blend of all-natural protein, whole grains, vegetables, fruit, and other carefully sourced seasonings. The first product in this line consists of all-natural ground turkey, whole-grain brown rice, spinach, roasted onion, celery, and dried cherries. The thoughtful combination of ingredients delivers a menu option whose time has truly come, Dion says.

“The Hormel Fuse Burger gives operators a healthful and flavorful option to offer their customers,” he says.

Hormel Foodservice believes that items that deliver on the better-for-you promise, flavor, and overall eating experience offer operators an opportunity to not only capture profits, but also to draw in an entirely new audience of customers. This versatile product is capable of living in the burger section, with sandwiches, in the better-for-you section, and on the breakfast menu.

“We discovered that mixing these down-to-earth ingredients resulted in a uniquely delicious patty, and we deemed it just right for the growing number of patrons who want to feel good about what they’re eating, without giving up on a satisfying delicious eating experience,” Dion says. **SC**



Hatching New Egg Dishes

Eggs take center stage on breakfast menu as nutritious, tasty choice

The desire for high-quality protein in the morning is a major reason breakfast is a highly successful daypart in the quick-service industry. Increased morning traffic shows breakfast satisfies a variety of consumer needs like convenience, value, and comfort, but it is the need to jumpstart the day that is positioning breakfast as the shining star of foodservice.

The number of restaurants now serving breakfast increased in virtually every segment, according to Datassential, a provider of market research for the foodservice industry. Quick service continues to account for 82 percent of all breakfasts eaten away from home. Eggs are an integral part of that, appearing in more than 80 percent of breakfast menus across all restaurants. Eggs can be a center-of-the-plate offering, but may also be prepared to fit between or inside a muffin, bagel, wrap, or burrito to deliver on consumers' needs for portable, handheld items.

Further, breakfast items are popping up across all dayparts at a number of restaurants. Many of these contain eggs in one form or another, as poached, fried, scrambled, or in omelets. Egg whites are also becoming a popular menu alternative.

Eggs are a protein-rich powerhouse and a major traffic driver, which is why restaurant operators continue to innovate and take advantage of this trend, says John Howeth, vice president of **American Egg Board**.

Eggs are packed with a number of nutrients, and one large egg has varying amounts of the 13 essential vitamins and minerals for just 70 calories. While egg whites contain some of the eggs' high-quality protein, riboflavin, and selenium, when the yolk is discarded, there is a loss of at least a portion of the nutrients found in part in the yolk and, in some cases, entirely in the yolk. Eggs provide six grams of protein, nearly half of which is found in the yolk. One egg provides 13 percent of the recommended daily value of protein, which makes it an ideal protein choice for consumers.

Eating high-quality protein foods for breakfast has never been more important, and foods like all-natural eggs help diners start their day off right, provide physical and mental acuity, and help keep them energized and more satisfied throughout the day, Howeth says. That is why



eggs are maintaining or increasing their presence on quick-service menus across the board at a number of major chains, he says.

For example, McDonald's, which serves the most breakfast in the industry, not only launched egg whites to reach a growing consumer base this last year, but also promoted steak and eggs and other indulgent breakfast sandwiches to satisfy their customers' need for protein in the morning. Taco Bell continues to expand the number of locations with breakfast. Dunkin' Donuts promoted more egg limited-time offers than ever before, including a new Big and Toasted line extension with steak, Smoked Sausage and Egg, and Spicy Sausage and Egg. Like Dunkin's Big and Toasted, which maximizes protein by featuring two egg patties, Jack in the Box's sandwiches feature double the eggs.

Since eggs are so strongly associated with nutrient dense protein, consumers are clamoring for breakfast throughout the day and chains are giving them what they want, Howeth says.

"Dunkin' Donuts, Starbucks, Jack in the Box, Sonic, and many Subway locations already serve

Eggs can be a center-of-the-plate offering, but may also be prepared to fit between or inside a muffin, bagel, wrap, or burrito.

eggs beyond the breakfast daypart," he says.

McDonald's received considerable publicity for testing breakfast after midnight, and Jack in the Box's newest offering is a brunch burger available only late at night and features a hamburger patty topped with an egg, bacon, and hash browns.

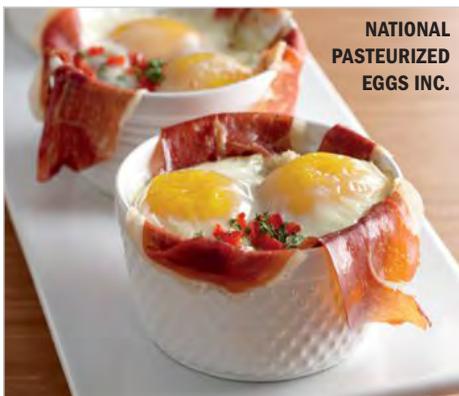
"With eggs available in so many ways, at so many new locations, and now at any time of the day, the breakfast daypart is more important than ever for restaurants," Howeth says. "By deliver-

ing high-quality protein, foods like eggs continue to be consumers go-to meal and continue to help drive traffic growth from sunrise to sunset and beyond.”

Michael Foods Inc. offers specialty egg products, refrigerated potato products, cheese, and other dairy products. Its category-leading Papetti’s brand strives to make restaurant oper-



MICHAEL FOODS INC.



NATIONAL PASTEURIZED EGGS INC.

ators successful with an extensive line of high-quality egg products and innovative programs designed to enhance menus, increase patron satisfaction, and generate greater profitability. Its wide range of value-added egg products fits any operational need, while offering convenience, versatility, savings, and safety over in-shell eggs, says Kelly Blaszcak, senior brand manager of Foodservice Eggs at Michael Foods Inc.

Traffic for morning meals continues to grow, and consumers want breakfast items that are convenient yet flavorful, she says. Egg whites retain their flavor and protein but eliminate some of the

fat and carbohydrates found in the yolk.

“We’ve seen notable growth in the egg-white category, as consumers continue to look for healthy items when dining out,” Blaszcak says. “We recently conducted an extensive study on away-from-home egg-white consumption and learned that the trigger is availability. Consumers want more egg whites on menus and will seek out

restaurants that are offering healthy yet flavorful menu items such as breakfast sandwiches featuring egg whites.”

Breakfast sandwiches still top items ordered at restaurants during the morning daypart, providing an easy way to fulfill consumer demand for egg whites. Blaszcak says heavy users of egg whites consume more eggs in total away from home, creating an incremental opportunity that operators can capitalize on by promoting their egg-white menu offerings.

One of Michael Foods’ newest products, perfect for breakfast sandwiches, is Papetti’s 1.5-ounce

Folded Egg White Patty. This product is preportioned and precooked for operational ease, saving time and labor while providing the consistent quality, performance, and taste that operators expect from the Papetti’s brand. Operators can serve their own signature breakfast sandwich by simply adding flavorful ingredients to the sandwich build.

Foodborne illness remains a real concern for restaurant operators serving eggs and poultry items. Protecting a brand is an ongoing concern for operators worried about foodborne illness and the ensuing problems and negative publicity an outbreak can cause. Consumer awareness about the potential of getting sick from some of the foods they eat has been heightened. In addition, social media provides a way for disgruntled consumers to spread the news if they get sick at a restaurant, and the national media is often willing to publicize a foodborne illness, especially if it originates at a well-known chain. Avoiding this situation is crucial for any food provider.

Safest Choice eggs are produced by **National Pasteurized Eggs Inc.**, a leading provider of pasteurized shell eggs in the U.S. With Safest Choice pasteurized shell eggs, restaurant opera-

tors can serve real shell eggs any way their customers like, even raw, without the risk of salmonella contamination. The Safest Choice patented, all-natural egg pasteurization process eliminates the risk of salmonella in eggs before the eggs even enter a foodservice operation so they can be offered to customers with food safety assurance.

“A lot of major operators are moving to safer products such as pasteurized eggs,” says Jay Berglind, vice president at National Pasteurized Eggs. “Food safety, protecting the brand, and risk management is on everyone’s mind.”

The use of ordinary shell eggs adds many food safety steps to prevent cross contamination and exposure to salmonella. In contrast, pasteurized shell eggs (PSES) allow operators to minimize labor and costs by eliminating these steps. The increasing amount of regulations in handling egg products and the amount of labor and product management involved to meet these requirements can easily offset the increased cost of a PSE.

Safest Choice pasteurized shell eggs look, cook, and taste just like the farm-fresh shell eggs operators are familiar with, while eliminating the need for the food safety procedures other eggs require. They are prepared based on a transfer of heat in a warm-water bath that very gently raises the temperature of the egg and maintains it for about an hour, preventing the egg from cooking.

In addition, the move toward eggs produced by cage-free or free-range chickens continues to grow. Public perception about the conditions of chickens confined to restrictive cages to facilitate egg-laying has grown, and some producers are responding by offering more eggs from chickens allowed to live in less restrictive conditions and engage in some natural behaviors. These include free-range and pasture-raised chickens. Consumers and operators are responding to this demand, so this could put a strain on supply in the next couple of years, Berglind says.

He says there is an increased interest in local sourcing of products from smaller farms by both operator and consumers. This can provide a streamlined supply and lessen the distance from farm to table, and also provide growth for local economies. In addition, there is growing resistance to genetically modified organisms, which has the potential to challenge the current structure of the egg industry.

On the positive side, Berglind says, there is a reassertion of the healthy attributes of eggs, particularly regarding fats and protein. A high-fat, low-carbohydrate diet is now recommended by some for weight loss and to avoid diabetes.

“Eggs can fit that category and be a part of that trend,” Berglind says.

Breakfast Wakes Up to Variety

Morning menus show increasing versatility with crossovers from lunch and dinner

As consumers seek more options in the breakfast daypart, quick-serve restaurants are responding by incorporating menu items from lunch and dinner into the morning menu. Chicken, turkey, vegetables, and even pizza are increasingly suitable breakfast choices.

“More and more, we’re seeing operators use what they have learned, what works at lunch and dinner, and they are transferring that over to breakfast,” says Maeve Webster, senior director at Datassential, a provider of market research for the foodservice industry. “This ranges from lunch- and dinner-style sandwiches to ingredients. Even nontraditional formats such as pizza are enjoying increased interest. So what was once the most conservative daypart—by way of experimentation and innovation—is now becoming far more innovative outside the bounds of traditional breakfast offerings.”

Portability is still king as a factor in breakfast menu development, and handheld items continue to grow. **Tyson Food Service** offers both protein options and carriers for handheld breakfast items. In addition to ham, bacon, sausage, and breaded chicken, Tyson Food Service offers wraps and tortillas.

“The utilization of savory proteins such as bacon, sausage, and ham can upscale a menu,” says David Jetter, chef at Tyson Food Service. “The addition of cheese or other items can increase the indulgent appeal for consumers.”

Tyson Food Service offers a line of fully cooked and raw bacon for foodservice use under its Wright and Corn King brands. It also offers fully cooked sausage and a variety of ham products. Other proteins not typically associated with breakfast are making their way onto the menu, even at quick-service restaurants, Jetter says. For example, chicken is increasingly a part of the breakfast menu, especially as a sandwich with biscuits or other carriers.

“Breaded chicken fillets continue to grow as a core offering at breakfast,” Jetter says.

Tyson Homestyle Breaded Right Size Chicken Breast Fillets are fully cooked, breaded with wheat flour, pepper, and other seasonings, and are the right size for creating smaller sandwiches. This versatile product can be used for breakfast, as well as for lunch and snack items.



Steak is another protein increasingly seen in today’s breakfast offerings, and it can be prepared starting with raw, pre-cut product.

“McDonald’s started this trend by offering steak at breakfast, and it continues to grow,” Jetter says. “Offering fresh-seared steak can upscale any menu item.”

Jetter also says carriers for handheld items for breakfast are going beyond bagels and muffins—innovative options include tortillas, wraps, and burritos.

The Tyson Mexican Original product line offers corn and flour tortillas that can be used for breakfast wraps or burritos, allowing operators to capitalize on the growing popularity of ethnic cuisine. Tyson also offers flatbreads under its Bonici brand. This artisan-inspired flatbread is par-cooked and ideal for breakfast sandwiches or breakfast pizza and multiple dayparts.

For those with the time and the inclination, sit-down breakfasts and platters still represent a growth potential, Jetter says. Menu items such as crepes and blintzes filled with yogurt, cheese, or fruit cater to such customers. The Tyson Lady

Aster line offers these products, in addition to traditional morning staples like omelets. The sweet and savory items mix an indulgent taste with a sit-down experience.

Other growing trends for the breakfast segment include artisan breads, jams and preserves, chicken and turkey sausage, and lower-fat items, says Chris Hansen, corporate executive chef at **OSI Group**. In addition, he says different types of flavored bacon and cooking techniques are also on the rise.

“There are a variety of ways to prepare foods and call out unique flavors,” Hansen says. “There are also different ways to prepare classical items; comfort foods prepared with a twist and little dashes of creativity.”

For example, a simple item such as toast wasn’t always available at many restaurants, but it is making a comeback. Beans and other legumes are increasingly popular high-protein alternatives to meats, Hansen says. “These offer a whole different experience in eating,” he says.

OSI Group works with leading quick-service chains to develop breakfast menu ideas cus-



TYSON FOOD SERVICE



OSI GROUP

tomized to meet exacting specifications, volume demands, and consumer expectations. The company's global processing facilities offer state-of-the-industry formulation, preparation and cooking techniques, and are supported by a sophisticated international supply-chain network that ensures food safety and cost efficiency.

Another growing factor in breakfast offerings is the melding of indulgent and healthy options. For example, egg whites or tofu are menu items with a healthy halo that are increasing on breakfast menus. Operators can amp up healthful beverage offerings by adding kale or other items that contain probiotics.

Hansen says Greek yogurt brought yogurt back as an alternative for traditional breakfast. It is portable and also has health benefits many consumers seek. For operators, it is the ultimate in convenience, as it usually comes pre-packaged and is ideal as a to-go item.

Hansen also says cooking items fresh to order is making a comeback. "Operators are cooking again," he says. "Cutting items out of a bag isn't always the best method. Using real ingredients prepared on the spot is what many customers are looking for."

Potatoes, which are the most common base for side dishes, are experiencing gains in the breakfast daypart. Potatoes can be prepared as hash browns, fried, or mashed, and they are menued extensively in all segments. Datassential shows 65 percent penetration on menus in fast casual, 73 percent in traditional quick service, 83 percent in mid-scale, and 87 percent in casual dining.

Since potato dishes are the go-to side dish in foodservice, it's important that restaurants offer items that meet customer expectations. Today's customers are looking for more choice in their potato side dishes, and restaurants need to provide the variety to appeal to everyone. Due to favorable pricing, potatoes are typically

the second-most profitable menu item after beverages in quick service.

Additional menu choices at many major chains and unbundling entrées with meal deals may result in less potato offerings, but operators can make potatoes a premium offering, says Don Odiorne, vice president of foodservice at the **Idaho Potato Commission**.

"The potato may now become an à la carte separate charge, which can make it an even more profitable item than before when part of a package deal," Odiorne says. "The volume of potatoes at breakfast and brunch is still very high. A lot of the creativity seems to be coming from high-volume independents. I think additional growth in the future will be in featuring dishes that include potatoes that can be marketed as gluten free, as well as capitalizing on the rise of pork dishes on menus in the last couple of years by adding potatoes as an inexpensive ingredient."

Odiorne offers some examples of potential growth areas for potatoes in breakfast and an opportunity to tap into the creativity of operators. Potato skins, usually limited to lunch or dinner appetizers, could easily be a breakfast hit, he says. Featuring eggs, meats, and potato toppings on a breakfast pizza; using potatoes as an addition to ethnic foods such as Mexican or Korean breakfasts; and roasting potatoes for menu items offer different ways to incorporate the ingredient into breakfast. Potato pancakes are also an option and can offer a vegan alternative, Odiorne says.

Simply Potatoes, fresh-tasting, refrigerated potatoes from **Michael Foods Inc.**, make it easy to offer customers more choices. They arrive prepared, refrigerated, and ready to cook, so kitchen staff can spend time creating signature potato side dishes instead of peeling potatoes, says Susanne Brau, brand manager of foodservice potatoes at Michael Foods.

Yukon Gold or fingerling potatoes come in vibrant colors and can withstand a variety of cooking methods, including grilling, frying, and pan roasting. For example, Yukons can be quick fried, then smashed, fried again, and served with a number of flavored aioli sauces.

Other vegetables and spicy sauces can offer enhanced side-dish options, says Rich Marasco, director of culinary at **Haliburton International Foods**.

Haliburton International Foods offers a variety of products suitable for breakfast menus. These include fire-roasted vegetables, sauces, and salsas. Using a proprietary high-temperature flame-roasting process followed by flash freezing, Haliburton offers 40 different vegetables in 250 different forms. These products are fit for retail or foodservice uses.

"Any dish with an egg and vegetable component can be improved with the addition of fire-roasted vegetables," Marasco says. "You can be especially innovative with a baked eggs dish, such as a strata or frittata."

Strata is a layered casserole dish made from a mixture of eggs, cheese, and bread, and may also include meat or vegetables. A frittata is an egg and vegetable dish cooked in a hot skillet and can also include meats and cheeses. Proper cooking results in a caramelized finish, and adding on-trend sauces such as chimichurri or harissa, a Tunisian chili sauce, can result in a unique and tasty breakfast alternative, Marasco says.

For breakfast sandwiches, a torta or flatbread can include eggs, meats, cheeses, and vegetables. When combined with a chili, tomato, or crema sauce, a torta can make a great breakfast alternative. "These can be simple to execute," Marasco says.

Key Players

American Egg Board

1460 Renaissance Drive
Park Ridge, IL 60068
847-296-7043
www.aeb.org



AEB connects America's egg farmers with consumers, communicates the value of "the incredible edible egg," and receives funding from a national legislative check-off on all egg production from companies with more than 75,000 hens in the continental U.S. The Board consists of 18 members and 18 alternates from all regions of the country who are appointed by the Secretary of Agriculture. The AEB staff carries out the programs under the Board's direction. AEB is located in Park Ridge, Illinois.

Butterball

1 Butterball Lane
Garner, NC 27529
919-255-7900
www.butterballfoodservice.com



Butterball Turkey has been popular with customers for many years. Today, we have even more irresistibly innovative ways to menu this long-time crowd pleaser. Give your patrons an enticing change of pace by making their favorite entrées, appetizers, sandwiches, salads, soups, and more with tender, juicy Butterball Turkey instead. They'll savor the delicious difference. You'll appreciate the incredible versatility.

Haliburton International Foods

3855 Jurupa Street
Ontario, CA 91761
909-428-8520
www.haliburton.net



No matter how you slice, dice, chop, puree, or cut it, Haliburton has the science and culinary excellence to make your recipes snap with garden freshness. Strategically located in Southern California, the largest year-round fresh vegetable market in North America, more than 90 percent of our products are made from fresh vegetables. From artichoke, carrot, eggplant, and garlic to mushrooms, onion, pepper, and zucchini, Haliburton offers more than 40 different vegetable varieties in more than 250 different forms. Available Individually Quick Frozen (IQF), refrigerated, or in flash-pasteurized, shelf-stable varieties, we have processing and packaging solutions for retailers, foodservice operators, and industrial manufacturers alike. And while we specialize in vegetable products, we are also the world's largest manufacturer of anchovy paste and a world-class manufacturer of sauces, salsas, and soup bases. Best of all, no one beats our technology for capturing flavors at the peak of freshness. From Fire Roasted Vegetables and Flash Pasteurized/Flash Cooled Sauces to extended Shelf-Life refrigerated soups, Haliburton has a solution for you.

Hormel Foods Corporation

1 Hormel Place
Austin, MN 55912
800-523-4635
www.hormelfoodservice.com



Hormel Foods Corporation, based in Austin, Minnesota, is a multinational manufacturer and marketer of consumer-branded food and meat products, many of which are among the best known and trusted in the food industry. The company leverages its extensive expertise, innovation, and high competencies in pork and turkey processing and marketing to bring branded, value-added products to the global marketplace. The company is a member of the Standard and Poor's 500 Index, Dow Jones Sustainability Indexes, Maplecroft Climate Innovation Indexes, Global 1000 Sustainable Performance Leaders, and was named one of "The 100 Most Trustworthy Companies" by *Forbes* in 2010. The company enjoys a strong reputation among consumers, retail grocers, foodservice, and industrial customers for products highly regarded for quality, taste, nutrition, convenience, and value.

Idaho Potato Commission

661 S. Rivershore Lane, Suite 230
Eagle, ID 83616
208-334-2350
www.idahopotato.com



Since 1937, the Idaho Potato Commission has represented the growers, fresh shippers, and processors of fresh, frozen, dehydrated, and refrigerated 100-percent grown-in-Idaho potatoes. The commission is directed by nine commissioners, five of whom are potato growers, two who are packers/shippers, and two who represent the processors. We supply 30 percent of the nation's fresh potatoes, mostly russets, but have expanded to include niche and heirloom varieties. The foodservice program concentrates on providing training and educational materials, recipes, and merchandising to a variety of foodservice institutions. In 2012, the Idaho Potato Commission celebrated 75 years of service.

Key Players

Jennie-O Turkey Store

2505 Willmar Ave. Southwest
Willmar, MN 56201
800-328-1756
www.jennieofoodservice.com



At Jennie-O Turkey Store, we believe that eating well shouldn't come at the cost of taste. And since 1940, we've been in the business of delivering on that mantra. From deli meats to whole turkeys to ground turkey and sausages, we offer more than 1,500 products and recipes that make it easy to eat well. Our history, mission, and ongoing commitment to innovation make Jennie-O Turkey Store what we are today: a recognized name in turkey products worldwide.

Michael Foods

301 Carlson Parkway, Suite 400
Minnetonka, MN 55305
800-328-5474
www.michaelfoods.com/foodservice



Michael Foods Inc. is a leading producer, marketer, and distributor of food products to the retail, foodservice, and food ingredient markets. Its principal products are specialty egg products, refrigerated potato products, cheese, and other dairy products. The company employs approximately 3,500 people and serves customers across North America, Europe, and Asia with Crystal Farms, Papetti's, Simply Potatoes, and Abbotsford Farms branded products.

National Pasteurized Eggs

2963 Bernice Road
Lansing, IL 60438
800-410-7619
www.safeeggs.com



National Pasteurized Eggs is the world leader in the pasteurization of shell eggs. With production facilities in the U.S. and Singapore, the company produces more than 300 million safe pasteurized shell eggs annually. NPE uses an FDA-approved, patented pasteurization process to inactivate salmonella and avian influenza virus. After rigorous testing, the company was given the seal of approval for taste and functionality by the ACF, the largest chef organization in the U.S. NPE's eggs are distributed under the brand name Davidson's Safest Choice and distributor labels to foodservice facilities and restaurants in 50 states and Mexico, and retailers across the U.S.

OSI Group

1225 Corporate Boulevard
Aurora, IL 60505 USA
630-851-6600
www.osigroup.com



For nearly 60 years, OSI Group LLC has been a global leader in supplying value-added protein items and other food products to leading foodservice and retail brands. It is a privately held corporation with more than 55 facilities in 16 countries. The company's global headquarters is located outside Chicago in Aurora, Illinois.

Tyson Food Service

2200 Don Tyson Parkway
Springdale, AR 72762
800-248-9766
www.tysonfoodservice.com



Tyson Food Service is the foodservice division of Tyson Foods Inc. Founded in 1935 with headquarters in Springdale, Arkansas, Tyson Foods is one of the world's largest processors and marketers of chicken, beef, and pork, the second-largest food production company in the Fortune 500, and a member of the S&P 500. The company produces a wide variety of protein-based and prepared food products and is the recognized market leader in the retail and foodservice markets it serves. Tyson provides products and services to customers throughout the U.S. and more than 90 countries. The company has approximately 115,000 team members employed at more than 400 facilities and offices in the U.S. and around the world. Through its Core Values, Code of Conduct, and Team Member Bill of Rights, Tyson strives to operate with integrity and trust and is committed to creating value for its shareholders, customers, and team members. The company also strives to be faith-friendly, provide a safe work environment, and serve as stewards of the animals, land, and environment entrusted to it.