

Marketing Fresh Meats: The Role of Brands

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Introduction: The Meat Industry Discovers Marketing

The fresh meat industry has crossed the threshold of contemporary food marketing. It is beginning to move away from the *selling of commodity* beef, pork, lamb and veal in favor of the *marketing of meat products* targeted to the wants and needs of specific consumer segments.

Traditionally, the term "marketing" has been regarded as the act of shipping livestock to the marketplace. Today "marketing" has taken on a whole new meaning to agriculturally-oriented executives. The term now encompasses the process of adding value to farm and food products, providing customers throughout the meat industry – supermarketers and restaurateurs, as well as ultimate consumers – with services and benefits that meet desired needs.

It is appropriate to focus attention in this presentation on the role of brands and marketing due to the recent emergence of numerous brands in the fresh meat industry. Brands are being developed by livestock growers and feeders who are identifying carcasses and meat products according to a number of attributes: "natural" methods of growing and feeding; degree of leanness and/or fat trim; as well as certain breeds and crossbreeds of cattle which meet desirable characteristics of quality grade and/or cutability. Some brand programs are based on specific states or geographical regions, and some on the ranches or feedlots from which the animals originate.

Brands are also being employed by fresh beef, pork and lamb packers in new ways. Ironically, many meat processors have for several decades attained high levels of sophistication in converting fresh meat products into branded hams, bacon, hot dogs and luncheon meats. Pork processors, especially, have excelled in this arena. Yet, until recently, traditional fresh meat items have been considered inappropriate, or impractical, for the application of these same principles and techniques. Moreover, some meat firms have maintained clear delineation of fresh and processed meat operations. There appears to be a growing belief that *all* meat products are subject to the application of the marketing concept. For instance, some beef packers are marketing to

retailers more closely-trimmed boxed product – the traditional fat cover, from up to 1 ½ inches, reduced to new maximums of ½ inch; and one packer trims, bones and *slices* vacuum-packaged subprimals needing only to be trayed and wrapped at the supermarket. Numerous pork processors are marketing boneless, trimmed, mini-subprimals to retailers; and one major pork processor is stressing the measurably lower fat content and leanness of its subprimals in addition to a ¼-inch fat trim.

All of these marketing initiatives are associated with brands which play the role of identifying specific products and permit suppliers to communicate their products' unique attributes. It should be noted that the brand identification in some instances is targeted exclusively to retailers, not to ultimate consumers. In such cases, retailers can be thought of as the "consumers" of certain product attributes; i.e., consistency of quality, timeliness and dependability of delivery, specifications of fat cover, internal marbling, and the productivity gains available from packer pre-trimming, rather than the laborious task of supermarket backroom or restaurant kitchen fabrication.

Packers and processors are also moving rapidly in the development of branded fresh meat products designed to appeal directly to shoppers and consumers. One fresh pork processor has recently introduced branded, fully-cooked spare ribs. The label not only identifies the processor, but also the restaurant which is noted for its excellent barbecued ribs. In this case, the restaurant provides the recipe and cooking expertise for the ribs. Another packer is selling some 30 cuts of branded, boneless, vacuum-packaged fresh beef, which arrives at the store ready for supermarket display. Brand awareness among consumers in this marketing program is being achieved by extensive television and newspaper commercials in both markets in which the product is offered. In-store video, point-of-sale posters and brochures, as well as product sampling by informed consumer spokespersons, are other aspects of the coordinated marketing approach used in this pioneering effort by the packer and supermarket customer.

Similarly, processors are now offering pre-cooked, fresh, case-ready cuts of selected meat, trimmed to close specifications and presented in vacuum packaging. At the request of one of the nation's largest retailers, several beef and pork companies have developed and manufactured these lines of fully-cooked, refrigerated, but never frozen meats. These products carry the brands of their respective firms. Items include microwaveable slices of roast beef and pork in gravy, steaks, chops, small roasts, kabobs and barbecued meats.

These case-ready, fresh and pre-cooked marketing initiatives have taken place within the past two years. The retailer

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who has taken the lead intends to expand sales of these products throughout its stores. It is significant that this leading retailer, as well as others who have traditionally regarded themselves as the major "marketers" of fresh meats from their supermarket backrooms, have begun to recognize the merits of shifting fabrication and marketing functions to packers and processors.

It should be noted that poultry processors such as Holly Farms, Tysons, Perdue and Foster Farms have led the way in adding value to fresh commodity products utilizing classic marketing practices, including strong consumer brands. Their successes have motivated retailers and red meat packers to innovate in similar ways. It is noteworthy that today's emerging fresh meat marketing initiatives also parallel the patterns established by leading food companies throughout the entire food system during past decades. The commodity, oats, for instance, was the basis upon which the Quaker Oats Company established its now highly profitable business. Similarly, General Mills, the Pillsbury Company, and numerous other food industry giants have built their modern food businesses from commodity-based origins with the guidance of sound marketing principles.

What It Takes for Marketing to Succeed

It is generally recognized that successful marketing programs are difficult to achieve. Failure rates of branded food products are notorious. Nevertheless, companies continually attempt to create marketing winners because the reality of today's marketplace is that any company must market successful, differentiated products and services or cease to maintain acceptable profitability. Thus, experience shows that profitable food companies are simply those which are most effective in the *process* of marketing. These organizations possess the best records of successful branded product innovation and development. Effective marketing, therefore, must be regarded not as an option for meat companies; but rather, as a necessity.

Brands vs. "Stickers"

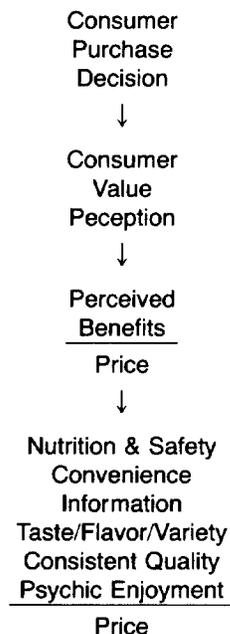
One point should be made at the outset when discussing the elements of effective marketing. The mere application of a *brand label* on a carcass, a subprimal, or a consumer package of meat, in and of itself, does not insure a profitable marketing program. In fact, this simple process adds to costs, but by itself adds nothing to customer benefits. One is reminded of the seemingly countless fresh fruit and vegetable grower labels on shipping containers of tomatoes, potatoes, berries, etc. The vast majority of these labels have virtually no meaning to consumers, and precious little to wholesalers and retailers; at least little that can be measured in terms of price premiums paid by retailers. In such instances, there is an absence of true marketing and the undifferentiated fruit and vegetables remain "commodities" in the eyes of the trade and the public. The merits and value of one "label" versus another are not consistently apparent to wholesale buyers, nor the consuming public. It is possible that the same might be said of certain initiatives being undertaken by the fresh meat industry in the name of marketing. No brand or label in and of itself creates a product from an undifferentiated commodity. Much more is needed to

achieve a viable brand, a brand that will be sought and purchased at a higher price because it is consistently worth more.

Marketing Litmus Test

No food product can succeed unless it meets this fundamental test of true marketing: Does the product respond to a perceived consumer need? That it meets a need will not, of course, in itself insure profit or success; however, unless it does meet this criterion, the branded product cannot succeed over time. Moreover, in today's highly competitive arena, products, if they are to succeed, likely will meet several important consumer needs.

One means of determining whether a product meets this litmus test of serving consumers' needs is to consider the following consumer purchase decision criteria that apply to all food products:



A potential shopper or consumer of meat products formulates a decision – analytically and emotionally – that ultimately will result in acceptance or rejection of a particular product. The decision process evaluates the perceived worth or benefits of the product in relationship to the price charged. Picture a shopper at a supermarket meat case handling a fresh beef product. What goes through the shopper's mind as the package is handled and examined in a typical supermarket meat department setting? What are the shopper's perceptions of observed benefits, in comparison to the price? This comparison translates into a value perception which in turn converts to the purchase decision. Recognize, however, that different consumer demographic/lifestyle segments – because they have different wants and needs – will place somewhat different emphases on this list of benefits and needs.

If the perceived benefits of the meat item exceed the price charged, and if the benefit-to-price comparison is more favorable than other direct purchase alternatives, a decision to purchase the item will be made. Otherwise, the product will be rejected. Given that this is the nature of purchase deci-

sions, the process of marketing, including the branding of products, can play a vital role in heightening consumers' value perceptions of meat products. Indeed, heightening consumers' value perceptions of meats is the basic challenge confronting the meat industry in its efforts to improve consumer demand and achieve profitable operations.

A Positive Contribution to Nutrition and Safety

On the basis of recent research, it can be said with certainty that a major portion of the shopping public is concerned and anxious with respect to the healthfulness of meat in the diet. Marketing-oriented initiatives can aid organizations to respond in ways insuring that meat products are nutritious and safe and that they will be correctly perceived by targeted consumer segments. Nutrition and safety issues are likely to change over time; but several current meat-related issues are as follows:

- Avoidance of fat, calories and cholesterol
- Concern over chemical residues
- Negative views of meat processing

Marketers wishing to address consumers concerned with fat, calories and cholesterol can establish specified levels of fat trim, as well as leanness in meat products sold to retailers and consumers. Specifications which are established and consistently maintained can be promoted, and the effects on diet can be objectively and accurately explained to potential consumers. The fresh meat industry – producer organizations, government, as well as packer and retailer associations – has developed objective data with respect to the nutritional values of principal cuts of red meats in the Nutri-Facts program. It is appropriate and beneficial for this type of information to be communicated in association with branded products. Furthermore, it is now known that there are distinct consumer segments composed of people who want – and are willing to pay for – different levels of fat trim and leanness. However, it is clear that many in the meat industry continue to view consumers as a homogeneous group in terms of preferences. It must become better understood that different consumer segments want different levels of trim and leanness. The experience of branded products across many food categories suggests that brands can be instrumental in clearly delineating meat products targeted for specific consumer segments in the marketplace.

In response to consumers who believe that current mainstream production and processing methods are potentially harmful, there have been several marketing initiatives focusing on "natural" production and processing. These efforts pose several major issues. First, it is possible that consumer confidence and trust in marketers of "natural" products may weaken when and if it is established that current production technologies and methods, such as the use of growth hormones and pharmaceuticals, are not only relatively safe, but contribute to a more productive and efficient animal agriculture. Second, it may be that leading marketers of "natural" products will discover over time that the gains of marketing "natural" products may be reduced by increasing numbers of competitors making similar claims. This is especially true if the potential consumer market for "natural" products is small and stable. Perhaps the most critical issue is the possibility of long-term damage to overall meat demand if the promotion of

"natural" products serves to impugn the wholesomeness of mainstream meat products – intended or not.

With respect to the role of brands in marketing, it is observed that as companies in the food industry establish strong brands, they tend to regard it as essential to take greater steps to insure that products bearing their brands be wholesome and safe. Moreover, several leading food organizations increasingly have made commitments to developing foods which make at least some positive nutritional contribution to consumers' diets. Interestingly, many of these companies have established standards of wholesomeness and safety which exceed those of governmental regulatory agencies. It is noteworthy that a major poultry processor is reported to be innovating technologies that are greatly reducing bacteria levels. The motivating factor is the recognition that its brand franchise with consumers is at risk so long as potentially hazardous bacteria levels exist; and that the possible loss of consumer confidence could result in economic devastation to the firm. This is an instance where a company committed to effective marketing is also investing in ways to solve genuine consumer problems.

Apparently, many companies recognize that investments made in establishing a viable brand ought not be put at risk. Incredibly high costs of establishing viable brands (5 to 50 million dollars or more) are no longer uncommon. It may also be that as company executives are brought into closer contact with consumers in the marketplace – physically and psychologically – there is a growing sense of corporate responsibility for the ultimate consumers of its products. Companies successful in developing branded products also tend to improve profits. In turn, these profits are frequently invested in progressive processes and technologies which are often state-of-the-art in terms of safe production methods.

Of course, there are exceptions to these beneficial contributions of marketing and brands; but it is evident that there are already positive steps occurring in the meat industry, such as higher levels of product quality and consistency, as well as products with "residue-free" assurances. Thus, the application of brand marketing can help to achieve significant gains toward more positive consumer perceptions of fresh meat's nutritional worth, wholesomeness and safety.

Continuing progress toward this goal will clearly require closer collaboration and coordination among retailers/wholesalers, packers, feeders and livestock producers. Packers and processors with direct communication throughout the meat industry must take a leading role in achieving improved coordination. Packers cannot be effective in applying consumer-oriented marketing principles to their operations unless they can procure raw materials meeting specifications from livestock producers. Improved coordinating mechanisms with appropriate incentives for producers are greatly needed. Traditional methods of buying livestock on averages, and compensating on the basis of dressed weights, are barriers to the implementation of true product marketing programs. Packers are coming to the realization that it is in their self-interest to buy on more precise specifications, paying premiums and discounts accordingly. In fact, methods are needed to encourage the development and adoption of new systems which identify and compensate producers, packers and retailers across the meat industry for genuine

value received. As much creativity and effort as is now being devoted to product development should also be directed to this need for more precise buyer/seller coordinating mechanisms.

On the selling side, retailers and restaurants, as the ultimate contacts between the meat industry and the consuming public, play key roles in facilitating packer marketing initiatives. Merchandising effectiveness is essential over a vast array of such activities as: product presentation, pricing, communication of information, as well as the proper care and handling of products. However, ultimately the bulk of *production* activities — fabrication, cutting and packaging — will be shifted to packers where comparative advantages exist. The specific nature and pace of change will differ greatly among the various types of retailers and restaurants. Nevertheless, all segments of the distribution system will be affected.

Creating More Convenient and Contemporary Meat Products

As a growing portion of the consuming public engages in non-traditional and faster-paced lifestyles, not only must fresh meats be perceived as more healthful, but meats must be fabricated and processed into more convenient forms. These new products also must be communicated to consumers, indicating that they are appropriate and appealing in the context of today's new lifestyles. Clearly, the marketing process and brands are important in meeting these challenges.

The roles of packers and processors in contributing to these goals are of greatest significance. Packers and processors are situated in the fresh meat system to conceive and implement ways to convert commodity meats into more convenient products. Marketing initiatives which truly serve the wide range of consumers' convenience preferences will include the following:

- Meat packages and cuts matching smaller households, as well as lighter and more selective appetites.
- Single muscle cuts, completely boned and trimmed.
- Packaging which contains desired information on nutrition, storage, preparation and serving.
- Value-added, high quality restructured products.
- Meats available with an entire range of preparation; from stir-fry cuts to spiced, oven-ready meats and fully cooked, heat-and-eat fresh entrees.

The many forms new and convenient meat products take will be guided by the realization that sizeable segments of consumers are desirous of foods that are highly consistent, contemporary in taste and flavor, and provide variety at meals and snacks. Moreover, consumers seek foods which are pictured as enjoyable and socially acceptable under given meal occasions. Thus, as the meat industry moves from limited lines of traditional products to a broad range of new products matching today's diverse lifestyles, there is a clear and compelling requirement for information and communication. Effective branding, with all its related communications activities, is no doubt an essential component of this conversion to new products.

Another important development for the successful marketing of new, convenient meat products is packaging. Consumer packaging for the vast majority of food products serves at least two purposes: to protect products and to present them in attractive, appealing and convenient ways. It is evident that consumers and meat industry executives are dissatisfied with current fresh meat packaging. The conventional foam tray/film overwrap fresh meat package, long used by retailers, is inadequate in terms of both protection and consumer presentation. Fortunately, there are exciting prospects for improved meat packaging. Rapid advances in the adoption of truly new and improved meat packaging are beginning to emerge. Vacuum and controlled-atmosphere packaging technologies are being applied to fresh meats. Even the foam tray/film overwrap package is now being improved and used by packers in conjunction with controlled-atmosphere shipping containers.

Indeed, improved packaging associated with branded products is in many ways a precondition for the meat industry to respond with improved convenience products for the shopping and consuming public. Packaging is an essential conveyer of information to consumers relating to selection, storage, preparation and serving. That this type of information is highly desired for meat products is amply demonstrated by responses to toll-free "meat hot-line" programs offered by a few firms in the meat industry. These firms have discovered that the most frequently-asked questions relate to preparation. Moreover, packers' products which are currently marketed with extensive information enjoy superior shopper acceptance.

Organizing and Conducting the Marketing Process

Firms in the meat industry which for the first time are making a commitment to adopting and implementing marketing are discovering that many challenges must be confronted:

- Marketing to be effective must be understood and embraced by members of top management, especially the Chairman and CEO. Only in this way can a total corporate commitment be made to the arduous and unfamiliar task of marketing.
- How firms can most appropriately organize to conduct marketing is a major consideration. For example, should a brand management system be employed; or is it more appropriate for a director of marketing to manage two or more brands? What kinds of market research activities should be conducted internally; and what research is best conducted by outside organizations?
- Corporate-wide strategic planning should be conducted to assess new corporate initiatives under a marketing orientation.
- Reasonable expectations from consumer-directed advertising and trade-oriented promotion is a major issue. Funds distributed between these two functions should take into account the long-term needs of building a brand and the short-term pressures to stimulate sales.

Meat processing industry trade associations, through educational programs, have been affirmatively addressing the challenges of assisting firms in the adoption of the marketing orientation with all of the diverse aspects outlined above. At the corporate level, companies are employing seasoned marketing executives from other successful marketing firms; and they are utilizing the professional training of such organizations as the American Management Association. Additionally, a marketing management program in conjunction with a university capable of tailoring a marketing program to the particular needs of the meat industry is being considered.

Organizations representing livestock producers, such as the National Live Stock and Meat Board, state Beef Councils, the National Pork Producers' Council, and the American Sheep Producers' Council, have initiated effective programs that contribute importantly to the meat industry's adoption of marketing. Technological research to be used by packers in the development of new products, and consumer research to identify potentially successful new meat products, as well as promotional programs to communicate the positive story of meats to the consuming public, are examples of these activities.

Summary and Conclusion

Increasingly, the meat industry realizes that truly effective marketing occurs when meat products respond to one or

more of the following shopping criteria:

- Positive contributions to health and nutrition
- Greater convenience to match busy lifestyles
- Better information on preparation
- Contemporary taste, flavor and variety
- Consistent quality
- Enhanced psychic enjoyment

The trend toward marketing and branding of fresh meat products is certain to contribute significantly to a customer and consumer-oriented meat supply. Packers are trimming, portion cutting and packaging meat, and will gradually replace the traditional role of supermarkets in meat cutting and packaging. Packers are beginning to develop and market branded products characterized by consistency and high quality, as well as new levels of wholesomeness and safety. The "marketing orientation" will be a powerful force energizing packers to insure that meat products match targeted consumer preferences; and that the raw materials for these products are obtained from growers and feeders using the most appropriate animal production practices. This trend, which is already underway, needs to be accelerated.

Given outstanding leadership throughout the meat industry, effective programs such as Nutri-Facts in place, new promotional programs on the drawing board, sound on-going market research and substantial new funding to implement demand-expanding initiatives, the meat industry can look forward to a new era with justified optimism and enthusiasm.

Discussion

M. Marchello: I have an interest in the fact that the key to this is consistency in products of all kinds. I see a problem with no-roll beef losing identity when put in a box, and occasionally older beef is slipped into the box. How do you address this problem and is the packer or someone else responsible for the problem?

J. Francis: You have identified a real challenge for the packer. It is one thing to say "Give Good grade beef a new name and see if that kind of beef has a new place in the marketplace," but we will still have no-rolls, as you have pointed out. I think this is a very serious problem for the packer to work with. One idea I have heard from a retailer who is marketing a natural product and a branded product is that the natural product was keeping the boss happy but he liked the branded product because it came from one location. All the beef came from one farm and offered him a great deal of consistency. This may be a can of worms, but we may be looking for some kind of system for tracking back to the feedlot. Can we do more sorting in the major feedlots? Can we pair up similar frame scores, muscling scores, etc? The problem is not going to go away. We still have to find a home for the losers. We will have a new set of losers, I hope a smaller set of losers, but the concentration will be worse.

J. Savell: I think USDA's figures on no-roll consist of Prime through Utility and Yield Grade 1 through 5. I think that pretty well explains where we are. When we have talked to packers about trying to sort and do a better job of marketing both ends with the Choice to one segment and the Good or Select, or whatever it may be, to another segment, they really object to sorting more than twice. They want to sort into categories

of Choice and all others. The idea of going to three lines of boxes really gets complicated, and I understand the problem, but it sure is a problem that needs to be solved for the future.

Marchello: I might add one comment to that. The fact is that if you are building a business, it is a hard upward road and all it takes is that one bad piece of meat that someone sticks in the box and you are back to zero again. The bad image of something mushrooms tremendously, whereas consistency and a good image must be built. The companies that are willing to put their names on that product and stand behind it put forth a very positive front, and we need more of this. This goes back to people saying "My product is good – you buy it and I will guarantee it." I think we have gone away from this in the last 20 years.

A. Pearson: You have identified a key issue. It was very interesting that the President of Kroger, not the Vice-President for Meat Operations, went to the AMI's annual fall meeting about 18 months ago and asked for branded fresh meat products from packers and processors to do what you are suggesting. That is, to gain consistency; that he sees as being so difficult to get with our current distribution system, which ships generic beef through the system. He wants someone else's name on that product. I think you really identify the issue: Once someone puts their name on the product, they are going to have to take the steps to make sure the product is consistent. We will have to get the older animals out of the system, have ways to certify that the animals coming out of the feedlot are of a certain age, that the feeding systems are consistent, that the breeding stock is consistent, before I believe we are really going to be suc-

cessful with some branded products.

J. Allen: Con Agra had some chicken products on exhibit at the Food Marketing Institute meeting a couple weeks ago; and on the package, they have a number they can use to identify the chicken all the way back through production to the hatchery. That is a sign of the times. Part of this quality control of variability requires a partnership of the packer with the wholesaler and retailer. The retailer has to have a sufficient and adequate quality assurance program on his end of things, too. That is part of the real world. When the boxes are not really looked at or inspected and just go right into the system, there is a responsibility there, but maybe there doesn't have to be. However, in the absence of that, what really happens is that the beef system or the red meat system is putting product in the case that is variable and has the risk of having a poor experience with the shipper. You get the feeling this red meat system is dangling so loosely that we just have to tighten up. We must have tighter specs all the way through the system.

G. Davis: When we look at this problem, it seems like the whole span on percentage fat in the carcass may need to be addressed. It seems that about 20 percent is the minimum for acceptability for total percent fat in the carcass; which is about Yield Grade 1 to the very low end of Yield Grade 2 beef, and then 40 percent is Yield Grade 4 beef. In Yield Grade 3, fat is about one-third of the carcass. If we go to muscle boning and presenting products totally trimmed, we are looking at presenting to the consumer a product with about 10 percent or less fat. The question is, where are we going to remove the fat? I don't think any of us have a problem seeing that it needs to be removed. We are going to have to respond as meat scientists this next year, and in future years, to that question. There are a lot of producers who are pretty concerned. This last year, we did a little study that was released in August which has resulted in 172 phone calls or requests for a report on this subject. These producers are asking us what they should have out in their fields and what can they do with the product. I think they are not enjoying the psychic part of this whole issue. What do we do? Maybe we need to be putting together a group among our meat scientists to address it so we don't respond with various ways to remove the fat. We need representation from the marketing segment in addition to the producer and meat scientist segments. We all know we will need to remove the

fat and I think some of the fat is going to have to be removed in the feed yard and by genetics. We are still going to have that segment of fat from about 20 to 10 percent that still has to be removed. Do you think we can remove all the fat, starting with Yield Grade 3 beef, expect to go all the way down to 10 percent and present that product to the retail case? Or should we, as meat scientists, be addressing the whole yield grade system and encouraging incentive programs or something to get that fat off?

Savell: I believe Yield Grade 3 as it is today, which is one-third fat, will not work when we try to go to a total trim or a very closely-trimmed product. I think we will have to redirect our efforts toward producing cattle comparable to Yield Grade 2 to make them fit into the system. We used to always say that Yield Grade 4 was man-made. Any time we had a Yield Grade 4 animal, it was because someone mismanaged that animal and produced an overfat one. It may be that a large percentage of the Yield Grade 3 cattle are that way. I think instead of feeding an animal to be a Choice, Yield Grade 3 in the future, we will make the decision that we will be better off to make that one a Good, Yield Grade 2 and market it because of its leanness rather than the perceived benefits of having it a Choice. In a lean-beef system, it will be very difficult to make a Yield Grade 3 work.

D. Kinsman: Now that I know what psychic perception is, I'm concerned about some of the labels I see. Randalls Food and Drugs – what is Drugs doing on the label with food? Secondly, why does Kroger have "grain fed" in huge letters, "USDA Choice" in lesser letters; and why use the word "cheap" when "inexpensive" will do?

Pearson: Your point is very well taken. I think we have some labeling problems and let me deal with the issue of labeling a little more broadly. The whole issue of using carcass designations to describe the products that consumers are purchasing at retail, I believe, is a problem that will back up on us at some point. The Nutri-Facts approach to labeling is sound because it is labeling based on what is going to go into the stomach. I am inclined to think that the meat industry really needs to develop a labeling system that they would be comfortable with; then go to the USDA and get approval of that system. I believe we have some problems that will be viewed negatively by consumers, once it is realized what all the labels mean.