

PRINCE EDWARD ISLAND  
CATTLE PRODUCERS



# Development and Cost Assessment of Market Protocols

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## **Introduction:**

Dynamic Outcomes Consulting (DOC) appreciates the opportunity of working with the Prince Edward Island Cattle Producers (PEICP) on the Development and Cost Assessment of Market Protocols Project. This project is a follow-up to the Cost of Production Study (COP) recently completed and it is hoped that the data collected during that study will be helpful for this topic. DOC has worked with the PEI Cattle Producers on market related projects in the past and this work provided a strong foundation for the recent efforts by the PEI Cattle Producers in conjunction with the Culinary Alliance and Atlantic Beef Products.

## **Project Background:**

It is understood that branding is the use of a name, term, symbol or design to give a product a unique identity in the marketplace. There is a wide range of beef brands in the market in North America. Many of these brands have a unique story based on origin and the producers behind the brand. In addition, many brands also (or alternatively) focus on product specifications related to processing, carcass size and breed.

Finally, many beef brands also focus on production protocols and use these as part of the brand story. The simplest version of this is a single issue brand. Two examples of this are "humanely raised" and "grass fed" regimes. When there are no other brand attributes, these brands are termed single issue brands. These brands tend to have a very specific niche in the market. Their future success relies on the issue chosen for the brand remaining of concern to their consumers. Another example of this type of brand is salmon safe products in the US Northwest. This brand confirms that the production practices for land-based agriculture are not harming the salmon habitat in the area ([www.salmonsafe.org](http://www.salmonsafe.org)).

The majority of beef brands tend to use more than one issue / attribute - protocol / specification in their brand story. This provides a more in-depth story for the consumer, and more reasons to buy the product and support the brand. The following is a short list of such protocols (not intended to be exhaustive):

No Antibiotics	No Hormones
Humanely raised	Organic
Sustainable practices	grass fed
Breed specific	Specific feed ration
no by-products (not allowed in Canada)	
Point of Origin	

The intent of this project is to determine the relative attractiveness of these production protocols to consumers and then determine, first using the COP data, and secondly using other sources of information, the cost of implementing these practices on farm. This will provide a tool for producers and the PEICP to use when determining which brand protocols to use in various branding programs.

### ***Production Protocol Overview:***

Production Protocols are common for individual producers who design their own production and feed systems, as well as for groups who have agreed to meet a protocol designed for a specific purpose. In the food industry, organic is an excellent example of a production protocol that a group has agreed to meet and to be certified, based on meeting that specific protocol. This example provides a guideline for producers to follow, and an assurance (through certification and producer audit) to consumers that the food is produced meeting the organic protocol. Individual producers may decide to create their own production protocol based on their infrastructure, access to capital, size of operation, or any number of other motivations.

This project is focused on the “Development and Cost Assessments of Market Protocols” for the PEI Beef Industry. It is more specifically aimed at addressing beef production protocol options, their appropriateness to PEI, and their costs and potential benefits to PEI Beef Producers. Information gathered from PEI Beef Producers as part of a recent “PEI Cost of Production Study”, completed by DOC, has been very helpful in understanding the production realities on PEI.

Market/Production protocols were studied to gain an understanding of what brand attributes are being marketed, by what organizations, and with what purpose.

We also considered what attributes were most desirable from the consumers perspective. Equally important was the consideration of their “willingness to pay” for that attribute.

Research was conducted online for most of the marketing, production protocol, and willingness to pay information. We restricted our research to North America since that is the limit of the market for PEI beef currently. With the recently announced trade agreement with the European Union (CETA), this may change and create new opportunities.

Since the start of this project a PEI beef brand has been launched: PEI Certified Beef. It is a combined effort by three partners, PEI Cattle Producers, Atlantic Beef Products, and the PEI Culinary Alliance. This brand has a number of production protocol criteria, as well as carcass size and grade specifications and origin requirements. Currently there are approximately 5 - 6 producers who are participating in this program. Although announced, there will be a delay in implementation as the production is certified and matched to demand.

Matching current production conditions and consumer preferences with opportunities to yield maximum benefit, at acceptable cost and minimal risk, is the focus of this report and will guide our recommendations.

## **Market Overview:**

Most studies that include in-depth consumer research are proprietary and used by companies marketing a particular product or by retailers wanting to better understand their customers. It is fortunate that in the spring of 2012, the Alberta Livestock and Meat Agency Ltd (ALMA) conducted the Canadian Consumer Retail Meat Study and the results are available. This is a detailed study which looked at Canadian consumer preferences for meat purchases in detail. Furthermore, their survey was large enough that in many cases they provided a regional breakdown

which gives us insight into the Atlantic Canadian market. Given that local supply only accounts for approximately 15% of the meat consumption in Atlantic Canada it is an efficient market for local beef products. The results of the report can provide a snapshot into the Canadian and Atlantic Canadian meat market - as such, the following provides a detailed summary of key data from the lengthy report.

1. First, the key results of the ALMA study - regarding key product attributes:

**"Price and Origin are the top two factors in the “trade off analysis”, more important than the added-value factors tested such as Raised without Hormones and Antibiotics, Grass or Grain Fed, or Organic."**

2. Second, the following table outlines the relative importance of these attributes:

Consumers segmented by their key driver (% of consumers in survey)	All Proteins	Beef	Chicken	Pork	Lamb
Price	56	53	68	52	58
Origin (country)	30	32	24	32	25
Product Claims (antibiotic / humane etc)	14	15	8	15	17

While many beef brands have production protocols for a range of attributes, it is clear that price and origin are the key drivers. The study did not break down origin into various regions of Canada - however, there are many other references to the importance of locally grown to consumers (covered later).

Based on purchase decisions, the following are listed in order of most important to least important:

- Price
- Product of Canada (country of origin)
- Without Hormones and Antibiotic
- Certified Humane
- Environmentally sustainable methods

- Grass or Grain Fed (equal preference)

Note: Organic was not a significant driver for meat purchases

3. The ALMA study also reports that: “Canadians report fairly dramatic changes in their protein consumption away from red meat and towards white meat/fish.

- 44% of surveyed consumers are eating less Beef compared to 5 years ago, while a huge 63% say they are eating more Fish, 45% are eating more chicken
- Consumers anticipate a continued protein shift over the next 5 years away from Beef and Pork and toward Chicken and Fish”.

This study by ALMA is the most recent data available which is based on a consumer survey regarding meat purchase tendencies. The study used a sample size of 1365 Canadians, and separated many results by region. Ninety-six Atlantic Canadians were included in the study. Approximately 85% of the meat demand in Atlantic Canada is satisfied with imported product. As such, the following provides a more in-depth review of the ALMA study, with a focus on Atlantic Canada - the most local market for our beef products.

As noted above, Canadian meat shoppers are most focused on price and health perceptions. Eight of 10 consumers read the weekly flyer and 69% choose the store to shop in based on the best deals in the flyer. While consumers tend to shop in 3-4 stores per week, they indicate that their meat purchases occur in 1 -2 stores per week.

In order to be considered as a store to purchase meat at, there are a number of meat department criteria that are critical in consumers' minds. These are, in order of importance:

<b>Weighted Base: Canadian Meat Purchasers 18+ - Top Two Box (rated 9 or 10)</b>	<b>2010 (n=1372)</b>	<b>2012 (n=1365)</b>
Meats are fresh	86%	91%
Meats look fresh, not dark or discoloured	80%	84%
Meat cases keep meat cold enough	78%	81%
Packages sealed well; not dripping	74%	77%
Good everyday prices	66%	69%
Meat specials always in stock	63%	64%
Good weekly specials	60%	57%

In a recent study conducted for "buy PEI" it showed that over 90% of the food purchased on PEI was purchased in mainstream grocery stores. This trend would be very similar in the other Atlantic Canadian Provinces. Although a regional breakdown is not available, it should be noted that 81% of all meat purchase are made by self-serving versus going to the full service meat counter. Based on the Atlantic Canada portion of the ALMA survey, the following questions regarding shopping and retailers were answered:

Survey Question - sample size 96 for Atlantic Canada	Atlantic S'store	Sobeys	Costco	Co-op	Local - Market / butcher
% respondents grocery shop regularly at	71	90	37	12	-
% respondents shop most at this store	32	46	5	5	
% respondents felt were best at meat	25	31	23	2	-
% respondents shopped for most of meat	28	34	16	5	2

It is clear that the majority of meat in the region is being purchased at the main supermarkets, and most of that meat is being selected at the self-serve displays. While the sample is small (96 people in Atlantic Canada) it is the best publicly available.

As shown in the next table, almost all Atlantic Canadians have purchased beef at one time or another. Only chicken has a higher market penetration.

Survey Question - sample size 96 for Atlantic Canada	Chicken	Beef	Pork	Lamb	Bison
% respondents* ever purchase	99	97	91	42	2

\* respondents were screened to be meat buyers

The ALMA study also provides a good indication in the shift in meat purchases happening in Canada and Atlantic Canada. From 2010 to 2012, the number of respondents who purchase beef either 2 or more times per week and those who purchase it on average one time per week have both declined. While a regional breakdown is not available for 2010, the breakdown for 2012 shows that the percent of respondents regularly purchasing beef is lower in the Maritimes than the National average.

Survey Question	Purchase 2+ per wk		Purchase 1 per wk		Totals	
	2010	2012	2010	2012	2010	2012
National % of respondents who purchase beef:	14	9	36	31	50	40
Atl. Canada % of respondents who purchase beef:		7		27		34

The ALMA report observed that branding is most developed in the lamb segment. Purchases of branded products appear to be less developed and declining since 2010. Beef branded purchases were 16% in 2012 compared to 19% in 2010. All other meat types showed similar declines in branded purchases. This behaviour could be linked to price being the strongest driver. The following table shows the number of respondents nationally and regionally who purchase branded meat products in 2012. The numbers for all types of meat are lower in Atlantic Canada. Again, price may be the key difference, and a second factor may be lack of choices compared to other areas of the country. For example, availability of branded beef

programs in Atlantic Canada is quite limited - with the few choices being Sterling Silver, Free From and in the past - Atlantic Tender Beef Classic.

Survey Question	Chicken	Beef	Pork	Lamb	Bison
National % of respondents purchase branded meat products	30	16	14	39	17
Atlantic Canadian % of respondents purchase branded meat products	20	8	11	25	-

The final element of consumer behaviour to look at is the trend in use of fresh meat. Nationally, the % of Canadians intending to cook meat at least 4 -6 times per week dropped from 46 to 42% from 2010 to 2012. A regional breakdown was not completed in 2010, but in 2012, while intense meat users (at least 4 -6 times per week) was lower in Atlantic Canada (36 vs 42 nationally), a higher percentage of the population were at least medium meat users - with 90% of Atlantic Canadians consuming meat at least 2 - 3 times per week, versus 82% nationally.

However, as shown in the following table, the change in consumption away from beef and pork towards chicken and fish is expected to continue according to the respondents to the survey:

% of National respondents who over the next 5 years expect to eat a little to a lot less of:	Chicken	Beef	Pork	Fish
% respondents	12	44	32	10

It is quite possible that the perceptions around health and nutrition of the various meat types listed below is a key driver in the move away from beef and pork towards chicken and fish.

Survey Question (Scale (-)1 -10(+))	Fish	Chicken	Beef	Pork	Bison	Lamb
National perception of healthiness and nutrition	9.1	8.4	7.0	6.9	6.9	6.8
Atlantic Canadian perception of healthiness and nutrition	9.2	8.7	7.1	7.3	6.4	6.7

In Atlantic Canada, the perception of greater health and nutrition benefits of fish and chicken are even higher than the national average.

A study titled “How local is local? Consumer Preference for Steaks with Different Food Mile Implications” by Kar H. Lim and Wuyan Hu, both from the University of Kansas was presented at the Southern Agriculture Economics Association Annual Meeting in 2012. The following is taken from their report: “the model suggested on average, LOCAL is preferred more than PRODUCT OF CANADA and PRODUCT OF USA. ....The portion of the sample that prefers LOCAL more than PRODUCT OF CANADA were estimated at 69% and 84 of the sample prefers LOCAL over PRODUCT OF USA. The premium for LOCAL beef over Canadian beef appears to range from \$.74/lb to \$1.82/lb .....

Their Conclusion reads: “One of the thorniest questions in regards to local foods is its proper definition. Using a choice experiment we investigated consumers’ valuation of local beef under different definitions. Our results show that the value consumers put to the label LOCAL is statistically indistinguishable to the label claiming a 160 km (100 mile) radius. As a result, we reiterate the policy recommendations of Louden and MacRae(2010) and Campbell et al. (2012) in that the distance of 160 kilometers could be adopted as Canadian standard of local food.

However, our results indicated that consumers value home-province products more than local. A plausible explanation is that consumers give wider acceptance to provincial label because of the more concrete effort of provincial food products promotion, or that Canadians identify themselves with home provinces. This could be an indication that it is more beneficial for food producers to use provincial labels instead of local when marketing products within home provinces.”

In the United States there has been a large body of research published that explores consumer preference rankings and consumer stated willingness-to-pay for various beef product attributes and/or product claims. A summary of published research articles, published after 2000, in peer reviewed journals

provides an interesting overview of both: 1) studies that rate consumer preference as a result of consumer surveys, and 2) studies reporting elicited consumer willingness-to-pay estimates for specific beef product attributes or claims. It was noted that most studies are from hypothetical settings where consumers did not actually exchange money for the product or consume the product. As such they may not behave the same way in a store when making purchase decisions as they do in a survey or experiment.

The most important broad attribute across all product attribute ranking studies include Food Safety, Price, and Health. Price is rated as the first or second highest ranked attribute in 89% of the studies, and Food Safety is ranked first or second in 80% of such studies. Specific attributes that have been rated by three or more studies, “US origin” was the second most highly ranked individual attribute. Product freshness is the highest ranked specific attribute.

There are not a large number of WTP (Willing-To-Pay) studies that could yield reliable data. For example, only five traits have four or more studies that have estimated and reported WTP for specific attributes (US Origin, Traceability, Tender, Food Safety, and Natural). US Origin has a median premium of 38%, Traceability 28%, Tender 23%, Food Safety 21%, and Natural 8%. Tonsor et al. (2012) is the only study to specifically estimate consumer WTP comparing labels “Product of United States” to “Product of North America”. Consumers were willing to pay an approximate premium of 38% for the “Product of North America” label, which was roughly the same as the estimated premium of 35% for “Product of United States” (compared to unlabeled product).

In a Kansas State University study “Consumer Risk Perceptions and Attitudes about Beef Food Safety: Implications for Improving Supply Chain Management” completed in 2008 looked at Canada, Japan, United States, and Mexico. This study made a number of interesting observations. It stated that “Canadian consumers exhibited more loyalty (larger WTP) to domestically produced steak than consumers did from any other country, though U.S., Japanese, and Mexican consumers also revealed strong preferences for domestically produced steaks”. It

also noted that “Canadian beef enjoys brand equity. That is, the Canadian beef country-of-origin has value in that many consumers have positive perceptions about Canadian beef. This is especially true in Canada, but it is also true in a relative sense in United States, Japan, and Mexico”.

To summarize the market information:

1. Beef has traditionally been a strong choice for meat purchasers in Canada.
2. This market base is eroding as consumers move to other meat choices perceived as healthier and more nutritious.
3. Most consumer beef purchases occur in supermarkets.
4. In supermarkets, service counters count for approximately 20% of meat sales. Consumers do see these counters as sign of service excellence.
5. The two strongest drivers for beef sales are price and "origin." These are followed distantly by production-based claims.
6. Branded meat sales are declining as a % of total category sales.

## **Beef Brands**

Dynamic Outcomes has researched a number of Canadian beef brands to understand their attributes. Among the brands researched are: Ontario Corn Fed Beef, Certified Angus Beef, Stirling Silver Premium Beef, Canada Gold Beef, Laura’s Lean Beef, Heritage Angus Beef, Diamond Willow Organic Beef, and PEI Certified Beef. The nature of beef cattle is such that there are many variables in determining quality. Safety, grade, location of cut and trim all contribute to beef quality measures. The process of branding requires additional costs over and above the costs that would be incurred if no product differentiation took place. Additional costs include everything from higher priced breeding animals to special penning and feeding regimes to separate harvesting, certification, chilling and packaging systems. At the very least, there must be additional market promotion costs. Brand attributes can be divided into two categories: functional (tenderness,

juiciness, and flavour are examples), and emotional (personal perceptions like natural or organic are examples). High quality certified beef brands incorporate high quality standards with scarcity of supply and marketing support to command premium prices.

A review of the PEI Cost of Production data base has yielded observations that are helpful in branding PEI cattle. Among participants of the study, there was only one producer using growth hormones. A review of practices indicates that there are currently approximately only six feedlots using this practice. Most feedlot operations are only using antibiotics to treat animals when sick. These attributes are part of many premium production protocols. Animal by-products are not used in the feed regimes of PEI beef cattle. This attribute is part of the specification of some premium programs. Most PEI beef producers have active Environmental Farm Plans for their operations. Sustainable practices is another element of several premium programs. Traceability, currently in place, and age verification soon be in place, are also part of premium programs. From this it can be concluded that there are attributes currently in place that can tell a brand story. No additional production costs are needed beyond current practices. Where animals become disqualified (e.g. being treated during last 100 days etc) they can be moved to non branded markets. Marketing costs are the only consideration, informing the consumers of the availability and the attributes of the brand.

PEI Certified Beef is a premium beef brand recently launched in cooperation with producers and value chain partners. Attributes of the brand are those mentioned above plus others such as production protocols and grade specification. Premium prices are to be divided between the value chain partners. Although in its early days, it is reasonable to expect that demand will exceed supply over time and that premium prices will be supportable.

### **Protocol Options:**

PEI could consider any number of market protocol options and combination of options; we will consider four:

- 1) Origin,
- 2) Hormone and Antibiotic Free, and
- 3) Origin and Hormone Free,
- 4) Origin and Antibiotic Free.

For our purposes we will consider “Origin” as born and raised in the Maritimes (could be PEI); hormone free means no hormones added to the animal during its life; and antibiotic free means no antibiotics used in the last 100 days. Grade and/or size standards could be added to any of the above.

1)Origin: Advantages – There is no additional cost and essentially all of the animals currently being processed by Atlantic Beef Products, and essentially all of the animals produced on PEI meet this protocol currently. Also it is a very important attribute to consumers. An added advantage is that no other federally inspected beef plant could produce this product.

Disadvantages: May not have the “sizzle” appeal of other attributes.

Costs: Should be no increased costs.

Revenue Potential: Has potential but the amount is unknown.

2) Hormone and Antibiotic Free: Advantages – Currently only a very small percentage of producers use growth hormones. Antibiotics are used in the last 100 days only on rare cases of specific need. There is consumer preference for this attribute.

Disadvantages: It is the third ranking for purchase decisions for consumers. It can and is being duplicated.

Costs: Should not cause an increase in costs. Producers currently using hormones may have weight gain costs.

Revenue Potential: There may be some small potential for increased revenue.

3) Origin and Hormone Free: Advantages – Combines 1 and 2 above.

4) Origin and Antibiotic Free: Advantages – Combines 1 and 2 above.

## **Conclusion:**

Based on the Canadian Consumer Retail Meat Study – 2012 discussed earlier, the two top factors in the trade-off analysis were price and origin. These two factors need to be considered carefully in planning a marketing/branding effort for PEI beef. The first factor, price, is largely out of the hands of the industry, unless a branded program is adopted; and one has been: PEI Certified Beef. Other than a branding program, factors like supply and demand create a market price. The production protocols / attributes are comprehensive and will restrict supply. PEI Certified Beef will have challenges on the supply side which can be worked through and the brand could mature over time as awareness grows. Using the current brand criteria, the majority of production in the region, following the tradition of calves being raised in NB and NS and being finished on PEI, will not qualify for PEI Certified Beef. This creates an opportunity for a brand with less restrictive criteria. The second strongest driver in beef purchases in point of origin. The ALMA study focused on country, however, work has been done on preference for local product in your home province or state. Work had previously been done on Atlantic Grown/Produced, and is currently used as an identifier for local with the major grocery chains in the region. In the ALMA study, “origin” was much more important than “without hormones and antibiotics”, “certified humane”, “environmentally sustainable methods”, “grass fed or grain fed”, or “organic”. This study confirmed that Canadian origin is always preferred over imported meat. Consumers in each province prefer beef produced in their home province. Overall only about 15% of Canadian beef shoppers are not primarily driven by price or origin.

The reasons consumers prefer buying Canadian are: 55% want to support the Canadian and local economy, and Canadian farmers; and secondarily meat buyers believe that Canadian standards are tougher (29%), Canadian meats are fresher, linked to shorter distance to travel (24%), and that it is safer/more trustworthy (22%). PEI beef producers should focus on the attribute of “origin” when planning

a commodity branding or marketing program to compliment the already established Island Certified Beef. Consumers need to be able to choose based on “origin”. This could be achieved by further developing the Atlantic Signature Brand which is recently been launched by Atlantic Beef Products (ABP).

It is worth exploring the issue of hormone and antibiotic use as an example of an attribute as this scored the highest of all production attributes assessed in the ALMA report. Island Certified Beef has established that no hormones are allowed during the life of the animal and this is not a production issue as most Island feedlots are not using them in the current production system. As well, no antibiotics can be used in the last 100 days of production for this premium brand. To extend this antibiotic free period past 100 days would result in significant costs to producers who do not have closed herds (majority of the industry). When animals are transferred between farms as feeders / backgrounders, there is a period of high risk (first 3 weeks after moving) which is managed using antibiotics such as Draxxin. With the use of Draxxin, on average only 2 or 3 animals per 100 would need to be treated for respiratory stress. Without the use of Draxxin, up to 50% of high risk animals (after moving) could become sick with respiratory illnesses. These illnesses result in no gain for at least 2 weeks, and could linger if the animals lungs are injured. This could result in poor finishing, and limited chance of the carcass grading a double "A".

Removal of Rumensin, which prevents coccidiosis is another medicine which would be difficult to remove from the current open herd production system. It is currently included in many commercially available mineral mixes. Again, assuming the consumer survey data in the ALMA report is accurate, only 15% of consumers are concerned about this type of claim. These consumers could be attracted to the Island Certified Beef Brand.

It is not recommended to use either attribute in a broader regional brand if its general ranking of importance remains consistent with the ALMA report. This would provide significant differentiation between the two brands, allowing the two brands "room" to compliment each other.

Point of “origin” can be identified in store by one of two methods: 1) package labelling, or 2) special sales/promotion area that only stocks product from one production area. Both approaches require the support of retail partners.

Further developments which will help the Atlantic Signature Beef brand (ASB) is further development at retail, and moving the program from the Service Case which only 20% of consumers buy from, to the self service counter where most of the beef purchases occur. Further supporting this would be the opportunity to market more of the carcass as a local brand in the self-serve counter. In a region which has a tradition of using more of the cheaper cuts, this would solve many supply issues. This would be a major development for the brand and would require a significant move by one of the major retailers. This could be assisted if the brand was further promoted through the region. While governments have invested heavily in ABP, a promotional campaign to promote the regional brand could provide the impetus needed to get over the hurdle of a major full carcass PEI has the fortunate advantage of having a federally inspected kill plant in the province. Atlantic Beef Products (ABP) is already part of the value chain for the PEI Certified Beef program and would be an expected supporting partner in any future PEI beef branding program.

All the production of the ABP plant could be marketed under a “Maritime” or “Atlantic” beef label, and Product of Canada. This would address the “origin” priority of Maritime consumers as coming from a “home” province as well as the “origin” priority for consumers in other parts of Canada as part of their “origin” priority by being a product of Canada. Other parts of Canada will still prefer their “home” province production, but PEI cannot do anything about that.

We believe that there is a tremendous opportunity here to address a very important consumer priority while not increasing production costs to producers. It also should be kept in mind that an “origin” label from PEI or Atlantic cannot be duplicated anywhere else. There may be opportunities to receive a premium price over time. It is our opinion that the creation of demand for a “Atlantic” brand,

that exceeds supply, could create a price increase to access this limited supply. Success of the brand would not attract copycats which could devalue the brand.

A long term commitment to consumer information and education is needed for the ASB brand to be successful in the long term. A packaging and labelling program would also be needed, as well as the full support and cooperation of Atlantic Beef Products.

The recommendations and conclusions drawn above are consistent with the market information summarized on page 11, and make it easy for consumers to support the ABS brand. It would be available locally in a mainstream supermarket in the self serve meat case, and it would be clearly identified, and supported with local promotion.

This report did not draw on the COP data to any great extent. Producer records for antibiotics and vaccines were not kept as separate records and the market research influenced the recommendations to focus on a simple brand that allows for inclusion of most of the region's production based on it being clearly Atlantic produced. This compliments the Island Certified Beef brand already established to focus on a higher end market opportunity.