



TEXAS TECH UNIVERSITY



An Overview of the Meat Industry

Dr. Mark Miller
*SALE Distinguished Chair
 In Meat Science*



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 in The Pursuit
 of Excellence*

Top Ten Meat Packers

1. Tyson Food Inc. 
2. Cargill Meat Solutions 
3. Smithfield Foods Inc. 
4. JBS USA Holdings Inc. 
5. Pilgrim's Pride Corp. 
6. Keystone Foods LLC 
7. Hormel Foods Corp. 
8. National Beef Packing Co. LLC 
9. OSI Group LLC 
10. Perdue Inc. 

Market Segments

TOP FIVE BEEF

1. Greater Omaha Packing Co. Inc.
2. BPI Technology Inc.
3. AFA Foods
4. Wolverine Packing Co.
5. Sam Kane Beef Processors Inc.

TOP FIVE CHICKEN

1. Pilgrim's Pride Corp.
2. Perdue Farms Inc.
3. Sanderson Farms Inc
4. Wayne Farms LLC
5. Foster Poultry Farms

TOP FIVE PORK

1. Smithfield Foods Inc.
2. Seaboard Foods
3. Indiana Packers Corp
4. Fresh Mark Inc.
5. Clemens Food Group LLC

Market Segments

TOP LAMB/VEAL

1. Mountain States Rosen
2. Strauss Brands Inc.
3. Wolverine Packing Co.
4. Chicago Meat Authority Inc.

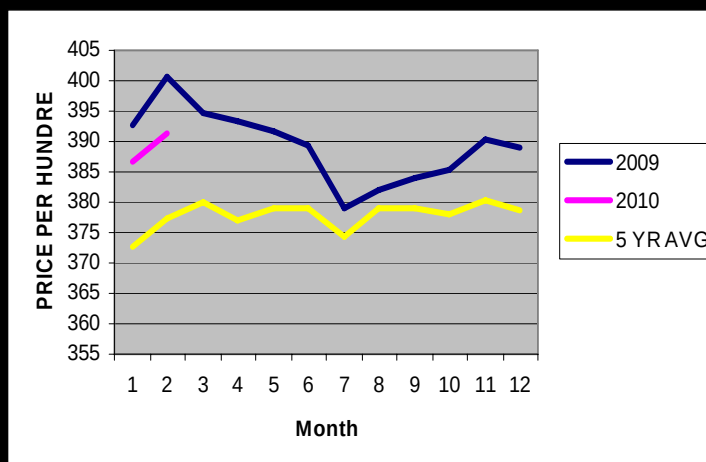
TOP FIVE TURKEY

1. Butterball LLC
2. Foster Poultry Farms
3. Perdue Inc.
4. Smithfield Foods Inc.
5. West Liberty Foods LLC

TOP PREPARED FOODS PRODUCERS

1. Foster Poultry Farms
2. Bridgford Foods Corp.
3. Abbyland Foods Inc.
4. L&H Packing/Surlean Foods

Monthly All Fresh Beef Price



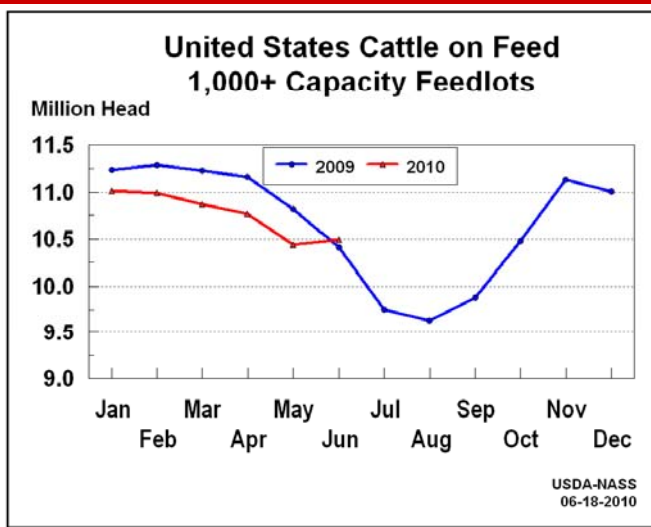
TOP FIVE STATES WITH CATTLE ON FEED IN 2009

1. TEXAS: 32,140
2. NEBRASKA: 26,640
3. KANSAS: 26,130
4. COLORADO: 11,770
5. IOWA: 6,300

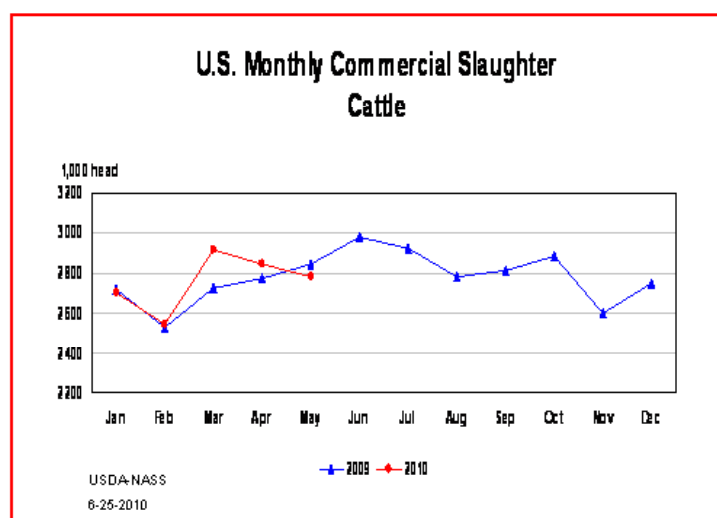
TOP FIVE STATES TO SLAUGHTER CATTLE IN 2008

1. Nebraska: 646,600
2. Texas: 620,500
3. Kansas: 572,200
4. Colorado: 232,500
5. Wisconsin: 145,000

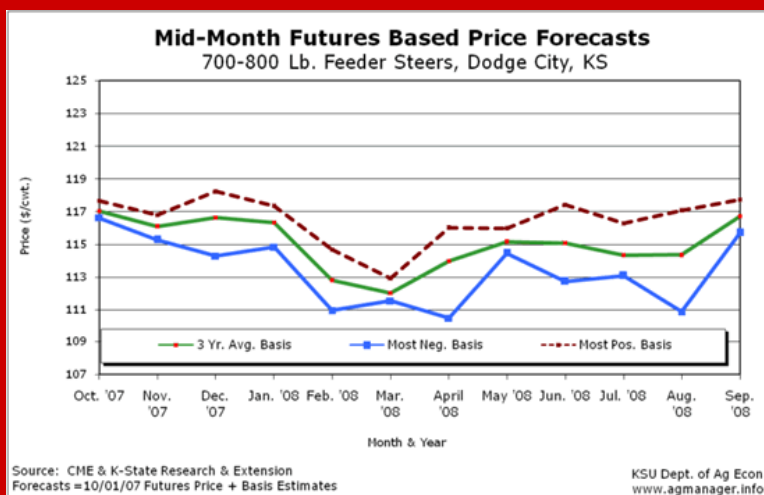
INDUSTRY CHARTS AND GRAPHS



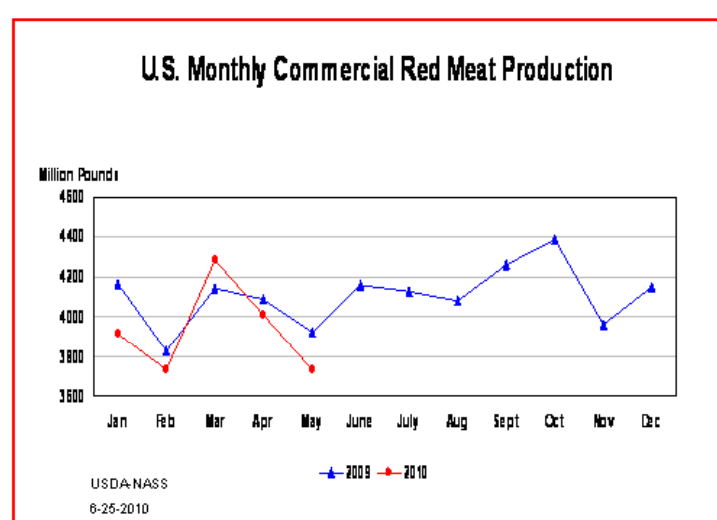
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National Cattlemen's Beef Association

NCBA... working to increase profit opportunities for cattle and beef producers by enhancing the business climate and building consumer demand.



President: Steve Foglesong



CEO: Forrest Roberts

Contact Information:

NCBA Denver

9110 East Nichols Ave. 1301 Pennsylvania Ave. NW
Suite 300
Centennial, Colorado 80112
Phone: (303)694-0305
Fax: (303)694-2851

NCBA Washington D.C.

444 N. Michigan Ave.
Suite 1800
Chicago, Illinois 60611
Phone: (312)467-5520
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NCBA Chicago

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Centennial, Colorado 80112
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National Meat Association

The mission of the National Meat Association is to be proactive and responsive in serving members -- individually and collectively. NMA members are committed to safe food, high-quality production, excellent service and supplies, and, most remarkably, to each other.



CEO: Barry Carpenter

Contact Information:

National Meat Association – West

1970 Broadway, Suite 825
Oakland, CA 94612

Phone: (510) 763-1533

Fax: (510) 763-6186

National Meat Association - East

7757 Citation Drive
Marshall, VA 2011



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National Pork Board

The mission of the National Pork Board is to generate added value to the U.S. Pork production industry by creating and executing forward-looking promotion, research and consumer information programs based on principles reflecting its investors commitment to quality, innovation and stewardship.



President: Gene Nemecek



CEO: Christopher Novak

Contact Information:

1776 N.W. 114th Street
Clive, IA 50325
(515) 223-2600
(515) 223-2646 (Fax)
E-mail: info@pork.org



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Texas Pork Producers Association

TPPA focuses our resources on consumer and producer education, production technology and swine health, environmental quality and leadership development for the Texas pork industry.

President: David Kempen

Contact Information:

PO Box 10168
Austin, Texas 78766
United States
Website: www.texaspork.org
Phone: (512) 453-0615
Fax: (512) 451-5536



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Texas Beef Council

Funded by the Beef Checkoff Program, TBC is a non-profit organization responsible for promotion and marketing of beef and beef products in Texas.



Chairman: Crawford Edwards



Vice Chair: Robert Bruner

Contact Information:
8708 Ranch Road 620 North
Austin, Texas 78726
512-335-2333 phone
512-335-0582 fax
beef@txbeef.org



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Southwest Meat Association

SMA is an organization created to make a difference for its members by initiating opportunities, resolving problems and thus helping allow our member companies to earn a reasonable return on investment. It is understood that the primary focus of our member companies is to produce products that meet or exceed consumer expectations in regards to product safety, nutrition and value.



President/CEO: Dr. Joe Harris

Contact Information:
4103 South Texas Ave., Suite 101
Bryan, Texas 77802
Phone: 979-846-9011
Fax: 979-846-8198



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Texas Cattle Feeder's Association

Texas Cattle Feeders Association represents the cattle feeding industry in Texas, Oklahoma and New Mexico. Known as Cattle Feeding Country, this area is the largest cattle feeding region in America and annually markets more than 7 million fed cattle--30% of the nation's fed cattle production.



President/CEO: Ross Wilson

Contact Information:

5501 I-40
West Amarillo, Texas U.S.A. 79106
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e-mail: info@tcfa.org



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Texas and Southwestern Cattle Raisers Association

A grass roots organization composed of cattle producers and operators of all sizes located primarily in Texas and Oklahoma that offers unique services through its law enforcement and livestock inspection divisions, which protect those involved in the cattle business.



President: Dave Scott



Executive VP/CEO: Eldon White

Contact Information:

1301 W. Seventh St.
Fort Worth, Texas 76102
(817) 332-7064

<http://www.thecattlemanmagazine.com/default.asp>



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American Meat Science Association

AMSA is a broad-reaching organization of individuals that discovers, develops, and disseminates its collective meat science knowledge to provide leadership, education, and professional development.



President: Keith Belk

Executive Director: Thomas Powell

Contact Information:

2441 Village Green Place
Champaign, Illinois 61822 USA
Phone: 800/517-AMSA (2672)
Fax: 888/205-5834

www.meatscience.org



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American Meat Institute

AMI is a national trade association that represents companies that process 95 percent of red meat and 70 percent of turkey in the US and their suppliers throughout America. AMI conducts scientific research through its Foundation designed to help meat and poultry companies improve their plants and their products.



President/CEO: J. Patrick Boyle

Contact Information:

1150 Connecticut Avenue, NW 12th Floor
Washington, DC 20036
Phone: (202)587-4200
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www.meatami.com



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North American Meat Processors Association

The North American Meat Processors Association is a non-profit industry organization helping its members achieve business success, NAMP provides exceptional value through high-caliber educational programs, interactive forums, and technical and regulatory services.



Executive Director: Philip Kimbal



Contact Information:

NAMP North America Headquarters

1910 Association Drive
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