# MEAT PACKAGING: PAST, PRESENT AND FUTURE

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## A Review of Fresh Meat Packaging

From the Beginnings of Meat through Yesterday, Today, and A vision of Tomorrow

# The Future is an Extension of the Present and the Past

- For 5,000 Years...
  - ◆ Man hunted for meat, but did not preserve it. Meat was eaten fresh off the killed animal.

- For 500 Years...
  - ◆ Man raised animals, killed and dressed them, and dried the meat.
    - And the buffalo

- 125 Years Ago...
  - ◆ Man grazed animals, killed and dressed them, and either salted the meat or ate it fresh.

- 100 Years Ago...
  - ◆ Man grazed animals, killed and dressed them, and refrigerated their carcasses
  - ◆ At retail level, the straw-hatted butcher wearing a bloodied apron converted carcasses into retail meat cuts in a shop strewn with sawdust.

# Late 19<sup>th</sup> Century through Pre-World War II

- Carrier invented refrigeration
- Slaughter in Kansas City, Omaha Chicago
  - ◆ Carcass shipment on rail
    - Rail cars with ice bunkers
  - ◆ Carcasses to butcher shops
- Processed/cured meats

### Pre-World War II through World War II

- Carcasses in butcher shops
  - ◆ Refrigerated storerooms
  - ◆ "Refrigerated" display cases
  - **♦** Sawdust on floors
  - ◆ Butcher cut to order
  - ◆ Paper wrap tied with string
  - ◆ Ice boxes in homes
- Delicatessens for cured meats

#### Post-World War II

- Advent of supermarkets
- ca 1947
  - ◆ DuPont—cellophane
  - ◆ Developed supermarket backroom cutting/packaging to inventory
    - Molded pulp trays
    - Cellophane wrap
      - Moisture resistant
      - Pass oxygen for color
    - ◆Semi-automatic equipment

# Fresh Meat Packaging—1950s

- Supermarkets expanded
- Corner /neighborhood butcher shops contracted
- DuPont continued to lead, grow and sell cellophane
  - ◆ As did its two competitors
- Problems
  - ◆ Short shelf life
  - **◆**Color
  - ◆ Leakage

## Centralized Red Meat Packaging—1964

- U.S. Department of Agriculture study
- Transfer backroom cutting/packaging for several supermarkets to a single location
- Save \$0.01 per package
- Chub packaging for ground beef developed
- Barrier bag/boxed beef concept

## Centralized Fresh Meat Packaging—1967

- Iowa Development Commission Report citing benefits
- Resistance from retailers, meat packers
- Boxed beef resisted by meat packers, retailers

### Backroom Fresh Meat Packaging—1960s

- Development of polyvinyl chloride (PVC) film
  - ◆ Moisture barrier
  - ◆Oxygen permeable
  - ◆ Stretch film
  - **◆**Tranparent
- Development of new trays
  - ◆ Clear polystyrene
  - Expanded polystyrene
- Demise of cellophane

- 40 Years Ago marked the beginning of vacuum packaging of...
  - Cured meats
  - ◆ Primal cuts of beef
- ...and poultry was "poor persons' food"



- 30 Years Ago...
  - ◆ Vacuum-packaged, cured meats began their climb
  - ◆ Service delicatessens receded
  - ◆ Vacuum-packaged primal cuts were resisted by retailers
  - Visionaries conceived of fresh red meat centralized packaging
  - ◆ ...and poultry was "poor persons' food"



## Centralized Fresh Meat Packaging— 1960s

#### Europe

- **♦** France
  - Intact cuts fabricated and packaged in central location
  - ◆By law, ground beef was in presence of consumer
  - ◆ Total system collapsed because of ground beef situation

## Barrier Bag Concerns—1960s-1970s

- Eliminate retail butcher jobs
- Cost—higher than hanging beef
- Cost of package materials

## Centralized Fresh Meat Packaging— 1960s

#### Europe

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# Centralized Fresh Meat Packaging— Europe—1970s

- Coop Denmark
  - ◆ More than 1000 IRMA outlets
  - ◆ All small
  - ◆ No space for butchers
- Employed Kalle principles
  - ◆ Clean operations
  - ◆ Cold <36°F
  - ◆ High 80% oxygen/20% carbon dioxide
  - ♦ 6-10 days shelf life

# Centralized Meat Packaging—1960s

- Ralph's Los Angeles
  - ◆ Conventional packaging
  - ◆ Central location
  - ◆ Limited shelf life
  - ◆ Rapid turnover
- Falley's Topeka
  - Conventional packaging
  - ◆ 70-mile radius rapid delivery
- Liberal Dayton, Ohio

# Centralized Meat Packaging—1960s— Tray Ready

- Subprimal cuts fabricated into retail sizes
- Reassembled
- Packaged in barrier bag
- Distributed to retailer
- Repackaged as cuts in conventional packaging
- Cryovac/Kenosha Beef development
- Original Pic 'N' Save
- Recently Sam's Club from Packerland

- 25 Years Ago...
  - ◆ Feed lot operations for cattle
  - ◆ Overcoming butcher resistance, vacuum-packaged primal cut beef began moving into supermarket backrooms
  - ◆ Chub packaging of ground beef
  - ◆ Keeper casing of coarsely ground beef
  - ◆ Expanded and impact polystyrene and molded pulp trays and PVC film overwraps
  - ◆ Vacuum-packaged cured meats increased
  - ◆ A few centralized packaging trials in the United States

## Centralized Fresh Meat Packaging—1970

- Kalle West Germany
  - ◆Plastic film producer
  - ◆ High oxygen/high carbon dioxide environment
  - ◆ Package produced on Multivac thermoform/vacuum gas flush/seal equipment
  - **♦** Shelf life
- Master pack

# Environmentalist Concerns—1970s et seq.

- Too much package material
- Plasticizers in PVC film
  - ◆ No effective alternatives
- PVC incineration generates
  - ◆ Acid rain
  - Grate corrosion
- No visibility through expanded polystyrene trays
  - ◆ Legislate transparent polystyrene
  - ◆ Pulp with open grid
- Polystyrene does not degrade in landfills

# Centralized Fresh Meat Packaging— Europe—1970s

- Marks & Spencer—United Kingdom
  - ◆ Primarily a clothing store
  - ◆ In every neighborhood in United Kingdom
  - ◆ Limited assortment of St. Michael's brand food to accommodate customers
  - ◆ No backroom
  - Fresh meat to accommodate customers
  - Originally imported from Coop Denmark
  - ◆ Transferred to British meat packers
  - ◆ PVC trays/heat-seal closures/Multivac equipment/high oxygen/high CO<sub>2</sub>
  - ◆ So successful, copied by U.K. supermarkets

## Centralized Fresh Meat Packaging— 1970s

- Chub packaging
  - ◆ For retail grind
  - ◆ Reduced oxygen
    - Barrier package structure
  - ◆ Color
    - Purple myoglobin in package
    - Restored to oxymyoglobin after opening
  - Applied to coarsely ground for distribution to supermarket backrooms
    - Retailer grinds
    - Retailer replaces on conventional tray
    - Double handling of microbiologically sensitive product
    - ◆ Still common practice



# Bivac Program—1980

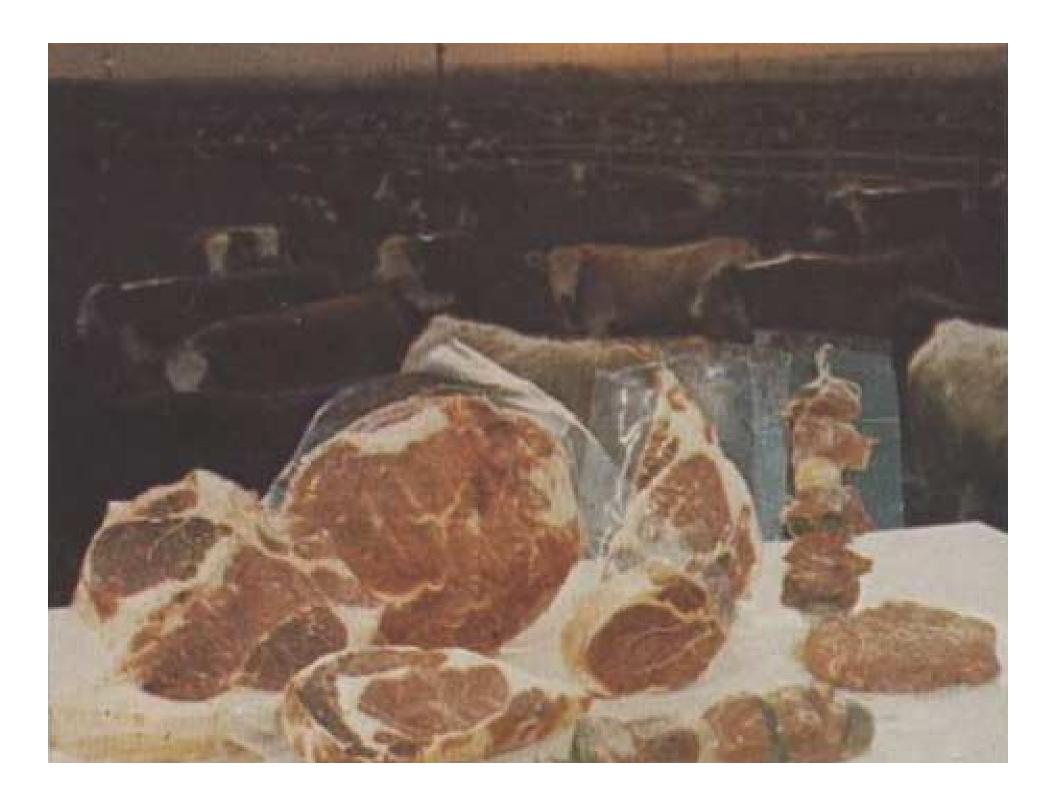
- Bivac—a William E. Young/DuPont development
  - ◆ Twin transparent web
  - ◆ Vacuum skin package fusing ionomer film
  - ◆ Purple myoglobin color
- Erdman's Minnesota
  - **♦**Four stores
  - ◆21 days shelf life at 28-31°F
  - ◆Operated until 1985

## Kroger/St. Regis Test—Mid-1980s

- SuperFresh St. Regis
  - ◆ High oxygen/high carbon dioxide
  - ◆ Coextruded barrier tray
  - ◆ Flexible barrier heat seal
  - ◆ Tiromat thermoform/vacuum/gas flush/seal
  - ◆ Large headspace for gas reservoir
- 10-day shelf life—intact cuts
- Tested in Kroger, Atlanta
- Similar to American Can Fresh Seal, Chatham Supermarkets, Detroit

- 20 Years Ago...
  - Vacuum-packaged primal cuts moved into supermarket backrooms
  - ◆ Poultry began its move to central packaging
    - Cut parts
    - Branding
  - ◆ Europe: centralized packaging of beef and pork
    - ◆ High oxygen/CO₂ packaging
    - Sanitary cutting and packaging
    - Controlled-temperature distribution
  - ◆ United States: more centralized packaging trials
    - ◆ High oxygen/high CO<sub>2</sub>: St. Regis/Kroger
    - Vacuum skin: Bivac/DuPont
    - American Can in Michigan





# Centralized Fresh Meat Packaging Projections from 1970s

- Principles and practices of 1970s technology are common commercial practice in 2002
- "High Ox"
  - **♦** Sanitation
  - ◆ Low temperature control
  - ◆ High oxygen/high CO<sub>2</sub>
  - ◆ Barrier trays
  - ◆ Heat-seal barrier flexible closures
- Master packs
- Chub package coarse grind

### Kroger/Excel Vacuum Skin—Mid-1980s

- Kroger Midwest/South
- Excel Missouri
- Twin web barrier vacuum skin
- Multivac equipment
- 21-day claimed shelf life intact cuts
- Color purple
- Too many leakers
- Discontinued 1989

### Safeway/Cryovac Peelable Lid—1980s-1990s

- Safeway Western Canada
- Vacuum skin package (VSP)
  - Base thermoformed
  - ◆ Top two-ply flexible conforms to meat shape
- Vacuum package on Multivac equipment
- Purple color
- At retail, top ply removed
  - ◆ Inner ply oxygen permeable
  - Meat returns to oxymyoglobin red
- Discontinued 2000
- New format: tray plus flat lid

### An Historic Foundation to the Future

- 15 Years Ago...
  - Centralized packaging of meat strong in United Kingdom
  - ◆ Centralized packaging of poultry in North America
    - Branded
    - Controlled distribution
    - Master packaging
      - Modified atmosphere
      - Air
    - Rapidly increasing sales



### Centralized Fresh Meat Packaging— 1990s

- High oxygen/high carbon dioxide
- Preformed barrier expanded polystyrene trays
- Flexible closure heat-sealed to tray
- Large headspace
- Equipment
  - **♦** Ross-Reiser
  - **♦** Mondini
- Commercial practice today

### Garwood Flavolok—1980s

- Australia
- Three-web/two-compartment
  - ◆Top web/tray barrier
  - ◆Intermediary web gas permeable
  - ◆In-line thermoform/gas flush/seal
  - ◆ Tested in Australia for offal meats

### Garwood—1990s

- Two-compartment
  - ◆Preformed tray
    - ◆Holds meat
    - Closed with heat-seal flexible closure
  - ◆ Preformed over-closure
  - ◆ Remove top closure at retail
- Indiana Packers/Marsh Supermarkets for pork
- Discontinued 1993

### Master Packs—1980s through Today

- Conventional primary packaging
- Barrier or non-barrier master bags
- High or low oxygen
- Coupled with
  - **♦** Sanitation
  - ◆Low temperature control

### An Historic Foundation to the Future

- 15 Years Ago...
  - ◆In-store delicatessens began to grow strongly
  - ◆ More North American trials on centralized packaging of beef
    - High oxygen/high CO<sub>2</sub>
    - Vacuum
  - Vacuum packaging of pork primal cuts
  - Consolidation of the beef industry
  - ◆ Beef consumption declining



### An Historic Foundation to the Future

- 10 Years Ago...
  - ◆ Centralized packaging of meat strong in United Kingdom
  - ◆ Centralized packaging of poultry in United States
    - Branded
    - Strong sales increase
  - ◆ Centralized packaging of pork
  - ◆ More trials on centralized packaging of beef
  - ◆ Nutritional labeling
  - ◆ Beef consumption declining







# Chronology of Meat Packaging— 1990s

#### 1990s

- ◆ Tesco in the United Kingdom converted
  - Barrier trays
  - ♦ High oxygen/CO<sub>2</sub>
- ◆ Poultry passed beef in per capita consumption in United States
- ◆ Centralized packaging of pork
- Ground poultry under modified atmosphere—high oxygen/CO<sub>2</sub> packaging
- ◆ Precooked poultry under modified atmosphere packaging
- ◆ Home meal solutions emerged as a force
- ◆ More North American trials on centralized packaging of beef
- ◆ Warehouse club stores
- ◆ Beef consumption declining



### And in the 1990s

- Mid-1990s...
  - ◆ Poultry consumption soaring
  - ◆ Pork consumption near that of beef—and growing
  - ◆ Home meal solutions growing exponentially
  - ◆ More in-store service delicatessens
  - ◆ Wal-Mart indicating conversion into all case-ready
  - ◆ Beef consumption declining



### An Historic Foundation to the Future

- **•** 1997...
  - ◆ Poultry is Number 1
  - ◆ More case-ready pork
  - ◆ Home meal solutions grew exponentially
  - ◆ Beef consumption static to declining
    - Dependent on price
  - ◆ More trials on case-ready beef, especially ground beef
  - ◆ More "value added" meats
    - Marinated
    - Seasoned
    - Skewered
    - With other ingredients

### An Historic Foundation to the Future

- 1998...
  - ◆ More trials—some commercial—on centralized packaging of beef
    - Cryovac VSP with peelable plies
    - High-oxygen: barrier polystyrene with heat-sealed flexible closures ground beef
    - Master pack
      - High oxygen
      - High carbon dioxide
  - ◆ *E-coli* O157:H7 pathogen issue
  - ◆ Consumers perceive fresh and nearly fresh as better, more nutritional
  - ◆ Fat trimming
  - ◆ More added-value meat



### Fresh Meat Packaging

#### 2002 Issues

- ◆ Despite the significant declines, meat volume remains high
- ◆ Meat marketing is meager
- ◆ The "corner butcher" has returned—even in supermarkets
- Microbiological deterioration is key
- ◆ Pathogens
  - ◆ Especially *E. coli* O157:H7
  - ♦ And *Listeria*
- ◆ But red color perception is key to consumers

# Fresh Meat Packaging

- 2002 Issues
  - ◆HACCP programs mandated in plants
  - ◆ Economics of case-ready beef
  - ◆ Temperature control in distribution
  - ◆ Radiation pasteurization for beef approved
    - One electron beam pilot plant operating
    - One gamma ray plant

#### 2002 Issues

- ◆Except for *E. coli* O157:H7 and analogous pathogens, how does 2000 et seq. Differ from 1990, 1980, 1970?
  - More competitive products
  - More competitive protein
  - More technical alternatives
- ◆ Is 2002 the same as 1982 in a much more competitive macroenvironment?

- **>** 2002
  - ◆ Case-ready beef alternative technologies
    - Vacuum
    - ◆Vacuum skin
    - ◆ Vacuum skin with peelable membrane
    - Pressure stuffing (chub)
    - Modified atmosphere
      - High oxygen
      - Low oxygen
    - ◆Peelable membrane

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- **>** 2002
  - ◆ Case-ready beef alternative technologies
    - Oxygen scavenger
    - High oxygen
      - Barrier
      - Barrier film
    - Master packaging
      - Modified atmosphere
        - ◆ High oxygen
        - ◆ High carbon dioxide
      - Air
    - ◆Ultra-low oxygen
      - SecurFresh





- **2002** 
  - ◆ Case-ready beef alternative technologies
    - Master pack
      - Preformed bag
      - Film-based
    - ◆Low-oxygen reblooming
    - Gas exchange
      - Active
      - Passive
    - ◆Irradiation
      - Electron beam
      - Gamma ray

- **2002** 
  - ◆ Do we need more technologies for case-ready beef?
    - Regardless, they are coming.

# Fresh Meat Packaging

- 2002 Issues
  - ◆ Case-ready beef
    - ◆Who or what is driving?
      - Consumers??
      - Retailers?
        - **♦** Chains
        - ◆ Warehouse club stores
      - Meat packagers
      - Packaging suppliers
      - Equipment
      - Materials
      - Microbiological safety; regulation
      - Academia
      - Inventors, entrepreneurs

# Fresh Meat Packaging

- 2002 Issues
  - ◆ Case-ready beef
    - Can push marketing significantly change a massive industry?
    - ◆Where is consumer marketing of beef?
    - ◆Shelf life time required?
      - → 1 week
      - 2 weeks
      - → 10 weeks
      - → 20 weeks (?)

### Case-Ready Beef—2002

#### United States

- ◆300+ million units of ground beef in retail chubs
- ◆Up to one billion units of ground beef in trays, and growing
- ♦ 500 million units of beef cuts
- ◆Less than 20% of total retail beef
- ◆Less than 40% of retail ground beef

# Fresh Meat Packaging

- Technical Issues
  - ◆ Initial microbiological load
    - Aerobic
    - ◆ Anaerobic (?)
  - ◆ Temperature control
    - Including fluctuation
  - Oxygen
  - ◆ Color
    - Myoglobin
    - Oxymyoglobin
    - Reversible reactions
    - Metmyoglobin
  - ◆ Package oxygen transmission

### Vacuum Packaging

- Heat-shrinkable bag
- Thermoformed rollstock films
- Pouches
- Vacuum skin packaging



## Vacuum Packaging

- Nozzle and clip
- Heat seal
- Thermoform in line
- Preformed trays



#### Modified Atmosphere

- High oxygen/high carbon dioxide
- High carbon dioxide/low oxygen
  - ◆Barrier overwrap
  - ◆Oxygen scavenger
  - ♦ Bloom from air
  - ◆Bloom from oxygen
- And other gases



#### Benefits

- ◆ Case management
  - Product variety
  - ◆ Reduced out-of-stock
  - ◆24-hour case
- ◆ Improved sanitation
  - Reduces cross contamination
  - ◆Reduces *E. coli* O157:H7 probability
- ◆ Reduced shrink and mark-downs

#### Benefits

- ◆ Focus on merchandising versus production
- ◆ Leak-proof packages—reduced visible purge
- ◆ Cost?
  - ◆Direct
  - ◆Total system
- ◆ Potential for branding and consumer marketing
- ◆ Needed if meat is irradiated

- Disadvantages
  - ◆ Package material costs
  - ◆Packaging equipment costs
  - ◆ Retail butcher resistance
  - ◆ Retailer knowledge of actual costs
  - ◆ Temperature control
    - Shelf life
  - ◆ What are the consumer benefits?



- Issues
  - ◆ Pathogenic microorganisms
  - ◆ Red color of beef
  - ◆ Shelf life time
  - ◆ Discoloration of pork
  - **♦**Cost
  - **♦** Inertia
  - ◆ Overt resistance
  - ◆Driving forces?



- Issues
  - ◆ All require sanitary handling
  - ◆ All require distribution temperature control
  - ◆ Modified atmosphere
    - High oxygen/high carbon dioxide
    - High carbon dioxide/low oxygen
    - ◆Color
    - Some fat deterioration
    - Shelf life limited

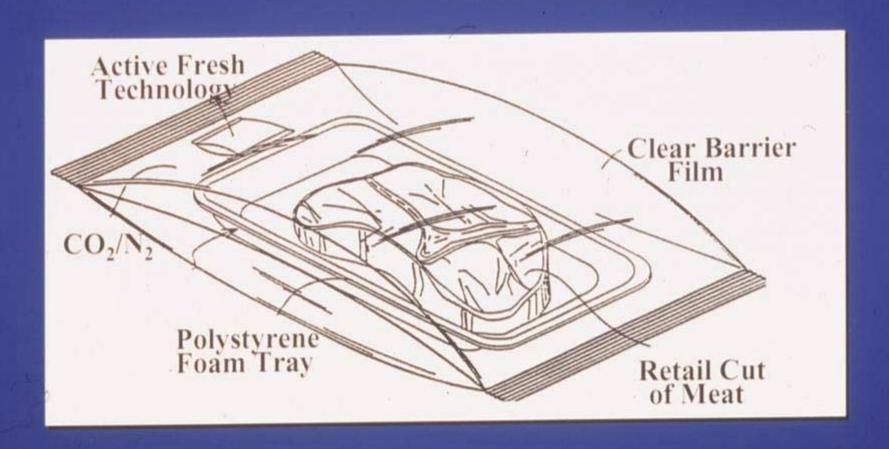
- Modified Atmosphere Packaging
  - ◆ Thermoform/vacuum/gas flush
  - ◆ Preformed tray/vacuum/gas flush
    - Heat sealed
      - PVC/PVDC tray
      - HDPE tray
      - PP/EVOH tray
      - Barrier (EVOH) expanded polystyrene tray
      - Ross Reiser
      - Tray plus dome
    - Wrapped tray
      - Cryovac BDF shrink barrier film
    - ◆ Flex/tray/flex: exterior barrier; product not visible



- Modified Atmosphere Packaging
  - ◆ Active Tech barrier outer film with scavenger
  - ◆ Master pack
    - From preformed bags
    - ◆From roll stock

#### <u>ActiveTech</u> <u>Package Concept</u>







- Vacuum Packaging
  - ◆Tray ready
  - ◆ Vacuum skin package

- Gas exchange
  - **◆**Passive
    - ◆Peelable closure
    - ◆Peelable vacuum skin package
      - Shelf life of vacuum
      - Bloom
    - Flavolok—two compartment
      - → Film closure
      - Semi-rigid closure
    - Master packaging
    - Active Tech



- Gas exchange
  - **♦** Active
    - Windjammer
      - MA packaging in distribution
        - ◆ Add oxygen at retail level
      - Requires oxygen tank in retail operation

- Technical foundation is in...
  - **♦** Sanitation
  - **◆**Temperature control
- ...to deliver shelf life

- Future Perspectives
  - ◆ Case-ready beef
    - ◆Is it here?
    - ◆ Will it significantly penetrate the retail scene?
    - ◆If so, which format?
    - Will/can beef transfer package structure/graphics from poultry?
    - Credibility

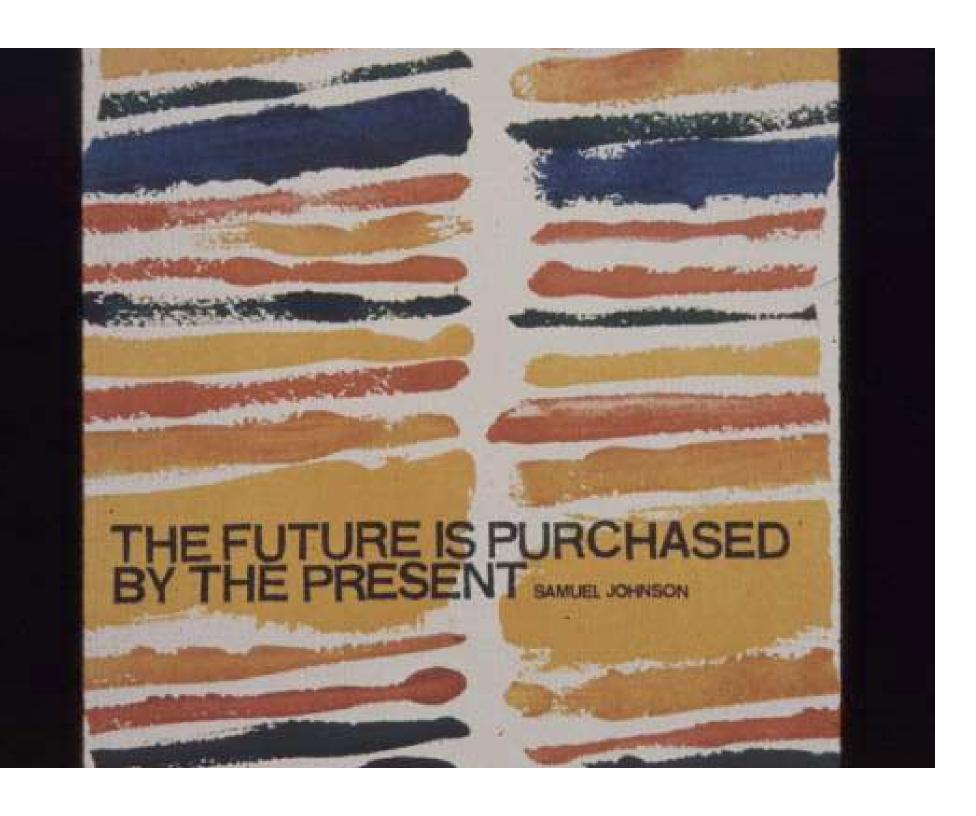
- Future Perspectives
  - ◆ Added value
    - Fully cooked for reheating
    - Partially cooked for finish cooking
    - Prepared for cooking
    - Ready-for-preparation with all ingredients

- Future Perspectives
  - ◆ Enhanced refrigeration
  - ◆ Integrated technologies
    - Aseptic and clean
    - Modified atmosphere/reduced oxygen
    - Pasteurized
  - ◆ The Center-of-the-Plate home meal replacement

- Future Perspectives
  - ◆ Ready-to-eat (ready-to-heat-and-eat)
  - ◆ Package is integrated protection + heating + serving
  - ◆ Graphics illustrate product as eaten
  - Graphics deliver complete cooking/heating instructions
  - ◆ A key element of tomorrow's home meal solutions

- Does the future lie in case-ready fresh?
  - ◆ ...or is this a vestige?
- Does the future lie in precooked?
  - ◆ Can the quality equal or surpass freshly cooked?
- Is this a packaging issue OR is it a total system issue?

# Packaging/Brody, Inc.



#### MEAT PACKAGING: PAST, PRESENT AND FUTURE

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Reciprocal Meat Conference American Meat Science Association Michigan State University June 31, 2002



- Future Perspectives
  - ◆ The aroma of freshly grilled beef is highly desirable—
    - Incorporate into retail merchandising
    - Incorporate into the retail package
  - ◆ Microwave susceptor package for meat?
  - ◆ Microwave susceptor package with sensing link to microwave oven controls