



JULY 10-12, 2016

**Omni Hilton Head
Oceanfront Resort**
Hilton Head Island, South Carolina

**2016 CHICKEN
MARKETING
SUMMIT**

PROGRAM of events

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WELCOME message

On behalf of WATT Global Media and the National Chicken Council, we would like to welcome you to Hilton Head Island and the 2016 Chicken Marketing Summit. This event brings together chicken marketers and buyers as well as some of the industry's allied partners to learn and share ideas at this unique, live conference.

The theme of this year's Summit is "Understanding changing consumer attitudes and demands." To accomplish this, you will be treated to a great group of speakers who will point out challenges and opportunities broiler marketers currently face and will face in the future, as well as to suggest some possible courses of action to address those obstacles.

As always, a highlight of the program for each of you will be the chicken buyers' panel, where all of you will have the opportunity to ask questions of representatives from some of the fastest growing and most innovative foodservice and retail operations.

Please enjoy your stay here at Hilton Head and take advantage of all of the networking events available to you on the Summit schedule. Be sure to save the dates of July 16-18, 2017, and make plans to join us in Asheville, North Carolina, at the Historic Grove Park Inn for the 2017 Chicken Marketing Summit.

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SCHEDULE of events

Sunday, July 10

2–6 p.m.
Palmetto Ballroom Foyer

Summit registration

3–4:30 p.m.
May 1 and 2

National Chicken Council marketing
committee meeting (open to committee members only)

4:30–6 p.m.
Courtyard

Welcome reception (dinner on own)
Co-sponsored by Kemin and Marel

Monday, July 11

7:30 a.m.–3:15 p.m.
Palmetto Ballroom Foyer

Summit registration

7:30–8:30 a.m.
Sabal, Level 2

Breakfast
Sponsored by Packaging Specialties-Pacmac

8:30–8:50 a.m.
Palmetto Ballroom

Welcome presentation
Mike Brown, President, National Chicken Council

8:50–9:30 a.m.
Palmetto Ballroom

McDonald's vision for antimicrobial
stewardship in food animals
Ernie Meier, McDonald's USA

9:30–10:10 a.m.
Palmetto Ballroom

Chicken welfare: Measures with impact
Tom Super, National Chicken Council,
and Melissa Kinch, Ketchum West

10:10–10:40 a.m.
Palmetto Ballroom Foyer

Refreshment break
Sponsored by Pactiv

10:40–11:20 a.m.
Palmetto Ballroom

Predicting future behavior of U.S. poultry
consumers and activists using Big Data
Richard Kottmeyer, V.P. of Agriculture & Food, Luxoft
and Peter Walter, partner, L.E.K. Consulting

SCHEDULE of events

Monday, July 11 *(continued)*

11:20 a.m.–noon
Palmetto Ballroom

An alternative to “Never Ever” antibiotics marketing
Dr. Karin Hoelzer, DVM, Ph.D., officer in health programs,
Pew Charitable Trust

Noon–1:30 p.m.
Shorehouse Oceanfront Deck

Lunch
Sponsored by International Paper and Sealed Air

1:30–2:10 p.m.
Palmetto Ballroom

Transparency for high-volume animal agriculture
Gary Corbett, CEO, Fair Oaks Farm

2:10–2:50 p.m.
Palmetto Ballroom

Consumer chicken consumption survey results
Joyce Neth, WATT Global Media, Laura Kleckner, ORC
International and Delbert Holzer, Elanco. Survey made possible
by primary research sponsor Elanco and contributing sponsors
National Chicken Council and *WATT PoultryUSA*.

2:50–3:30 p.m.
Palmetto Ballroom

Fresh prepared foods and poultry:
Reshaping the retail perimeter
Chris DuBois, IRI and Elizabeth Ehrhardt, IRI Protein Practice

3:30–4:10 p.m.
Palmetto Ballroom

The expanding market for “slow growing” chickens
Claude Toudic, EMEA technical manager, Hubbard France

4:30 p.m.
Shorehouse Oceanfront Deck

Cocktail reception (dinner on own)
Sponsored by Cobb and Express Markets

Tuesday, July 12

7–10 a.m.
Palmetto Ballroom Foyer

Summit registration

7–8 a.m.
Sabal, Level 2

Breakfast
Sponsored by Packaging Specialties-Pacmac

SCHEDULE of events

8–9:30 a.m.

Palmetto Ballroom

Chicken purchaser panel discussion: Hear from top executives in major retail and food service companies what their customers are doing and what they are hearing from consumers.

Dean Bradley, Buffalo Wild Wings Mike Ledford, Chick-fil-A
Chris Chang, Raising Cane's Stefan Oellinger,
Fresh Direct

9:30–9:45 a.m.

Palmetto Ballroom Foyer

Refreshment break

Sponsored by Pactiv

9:45–10:20 a.m.

Palmetto Ballroom

Building a consumer and regulatory intelligence network: A lesson from a key consumer facing brand

Richard Kottmeyer, V.P. of Agriculture & Food, Luxoft
and Victoria Platt, IBM

10:20–11 a.m.

Palmetto Ballroom

How a B2B company engages consumers

Mike Burger, corporate insights and
measurement manager, Monsanto

11:15 a.m. sharp

Omni Resort Lobby

Motorcoach departure for Palmetto Dunes

Pre-registered players of the golf tournament

11:30 a.m.

Big Jim's Deck, Palmetto Dunes

Golf lunch

12:30 p.m.

Robert Trent Jones Golf
Course, Palmetto Dunes

Golf tournament/shotgun start

Thank you to Roger Austin, V.P. Fresh Foodservice,
Pilgrim's for chairing the 2016 Golf Tournament

5:30–7 p.m.

Shorehouse Oceanfront Deck

Cocktail reception and golf tournament awards

Golf tournament prize emcee: Roger Austin
Sponsored by Interstate Container and Yerecic Label

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Golf prizes by Merial
Summit WiFi by Zinpro

TOPICS and speakers

Monday, July 11

8:50–9:30 a.m. McDonald's vision for antimicrobial stewardship in food animals

McDonald's USA director of quality systems, Ernie Meier, will discuss the fast food chain's decision process in arriving at the chain's antibiotics policy, and how McDonald's works with poultry suppliers and communicates with consumers on the issue.

He will also discuss the McDonald's process for keeping the consumer's perspective in mind and listening to customers and maintaining transparency about their food. Meier will also address how McDonald's partners with its supply chain to understand the intricacies of the decisions and the impact on suppliers as the chain's policy is implemented.



Ernie Meier, Director of Quality Systems, McDonald's USA

Meier has responsibility for quality systems for proteins and packaging in the McDonald's U.S. supply chain. That responsibility includes animal welfare and food safety and specification compliance as well

as strategic direction for those categories. Prior to joining McDonald's, Meier worked for Keystone Foods, a supplier to the McDonald's system. Prior to Keystone, he worked for Perdue Farms. Meier is graduate of the University of Florida in animal science, specializing in poultry science.

9:30–10:10 a.m. Chicken welfare: Measures with impact

How can the poultry industry tell its story about continuously improving the care of

chickens in a world of undercover animal abuse videos? This session will explore the research the National Chicken Council conducted to create a strategy that works to emotionally reach consumers and restore faith in chicken care.



Melissa Kinch, Partner and Associate Director, Ketchum West

Kinch manages Ketchum's Western Region with a particular focus on reputation strategies and programs. She has spent 19 years at Ketchum specializing in corporate responsibility, issues management, non-traditional marketing and content integrations.

In the agriculture and food industry, she helped lead the National Chicken Council's launch of ChickenCheck. In as well as many other reputation and issues programs, including creating strategies to combat attacks on agriculture groups related to animal rights and environmental standards.

Kinch developed the strategies to launch both U.S. Farmers and Ranchers Alliance, an organization made up of 90+ farming and ranching organizations, as well as the Council for Biotechnology Information's GMO Answers program. She is a production executive on the recently released documentary "FARMLAND," created to re-introduce Americans to the next generation of farmers and ranchers.



Tom Super, Senior Vice President of Communications, NCC

Super brings more than 16 years of combined experience in strategic communications, public policy, politics and meat and poultry issues management to NCC's senior management team.

He is responsible for day-to-day media relations, media outreach, social media management and strategic communications planning to supplement the National Chicken Council's legislative, regu-

TOPICS and speakers

latory, and public affairs efforts.

Prior to his joining the National Chicken Council, Super spent three and a half years at the American Meat Institute, most recently as vice president of public affairs. He previously spent six years at Greener and Hook LLC, a Washington-based strategic communications consulting firm. Super earned a B.A. in public policy from Washington & Lee.

10:40–11:20 a.m. Predicting future behavior of U.S. poultry consumers and activists using Big Data

Richard and Peter will highlight their latest analytical research and findings regarding consumer sentiment and apply them to the poultry industry to predict potential trends that will affect poultry in this year and beyond. Be prepared for bold predictions backed up by solid data and expect to better understand how consumers really think about protein.



Richard Kottmeyer, Vice President Agriculture & Food, Luxoft

Kottmeyer is a frequent speaker, author, and contributor on the intersection of agriculture and technology. He also writes under “Data Dork” for Farm Journal and leverages the same technology and analytics to spot

trends and insights into the Future of Food, including predicting the rapid growth of antimicrobial chicken demand from foodservice.

Prior to joining Luxoft, a global technology and software development firm, Kottmeyer led agriculture and food production for Accenture, IBM, Lehman, KPMG and Rothschild. Kottmeyer has been an agricultural trade delegate; advisor to the Chinese government on agriculture, acquisitions and Africa; an advisor to the G20 and African

Union; and helped write the agriculture and water sections of many developing nations’ economic plans. But what Kottmeyer loves most is using analytics to spot agriculture, food, consumer and advocacy trends well before they are commonly recognized.



Peter Walter, Managing Director, New York Office, L.E.K. Consulting

Walter has more than 20 years of global consulting experience with a focus on strategy development and activation and performance improvement for both corporate and investor clients. He currently leads L.E.K.’s agribusiness practice in the Americas and works extensively across

selected industrials markets, such as automotive, packaging and building products, as well as in transportation and logistics.

Prior to joining L.E.K., Peter worked with A.T. Kearney for ten years in North America and Southeast Asia. He received a B.S. in zoology from Duke University and completed his Master of Business Administration degree (summa cum laude) from the Kellogg Graduate School of Business at Northwestern University.

TOPICS and speakers

11:20 a.m.–noon An alternative to “Never Ever” antibiotics marketing

Concern over the increase in antibiotic resistance in human medicine has fueled the surge in demand for so-called ABF or “Never Ever” antibiotics growing programs for broilers. Will consumers accept an alternative besides “Never Ever”? In 2014, School Food FOCUS and the Pew Charitable Trust developed the Certified Responsible Antibiotic Use Standard, the first USDA-certified standard that allows for minimal use of medically important antibiotics in poultry production — but only when prescribed by a licensed veterinarian. Poultry companies interested in meeting CRAU must undergo regular USDA audits to verify conformance.



**Dr. Karin Hoelzer, DVM, Ph.D.,
Officer in Health Programs, Pew
Charitable Trust**

Karin Hoelzer is an officer in health programs supporting Pew’s safe food and antibiotic resistance projects. Hoelzer, a veterinarian by training, focuses on research and policies related to foodborne pathogens, the use of antibiotics in animals and other public health risks related to the food supply.

Before joining Pew, Hoelzer worked at the U.S. Food and Drug Administration where she developed and led risk assessments and conducted systematic reviews and meta-analyses on a variety of issues such as drug residues in dairy products and Listeria monocytogenes in retail delicatessens. Previously, she was a research associate at Cornell University, where she traced the transmission of pathogens between livestock and humans.

Hoelzer holds doctorates in veterinary medi-

cine from the University of Veterinary Medicine in Hannover, Germany, and comparative biomedical sciences from Cornell University.

cine from the University of Veterinary Medicine in Hannover, Germany, and comparative biomedical sciences from Cornell University.

1:30–2:10 p.m. Transparency for high-volume animal agriculture

What if instead of hiding animal agriculture production practices out of sight, farmers opened up their operations to the public and charged admission? Fair Oaks Farm has done just that and welcomes a half million guests to its Indiana operations annually. Learn how a 37,000-cow dairy and 3,000-sow farrow-to-wean facility has opened its doors to daily visitors and entertains while it educates the public about animal agriculture. A laying hen operation is on the drawing board, so Fair Oaks will soon be in the poultry business as well. Find out why Fair Oaks has taken this novel approach to transparency and learn what the results have been.



Gary Corbett, CEO, Fair Oaks Farms

Corbett is a cofounder of Fair Oaks Farms and has been CEO for more than 10 years. His responsibilities include developing Fair Oaks Farms’ overall strategic direction while providing the tactical leadership necessary to meet all objectives.

Corbett has over thirty years of management experience holding corporate officer and vice president positions at Dean Foods, Land O’Lakes and Swiss Valley. He holds an M.S. of economics and a B.S. in marketing from the University of Illinois.

TOPICS and speakers

2:10–2:50 p.m. Consumer chicken consumption survey results

This exclusive survey reports the latest consumption trends for U.S. adults, including purchases from supermarkets and food service. We'll also report purchase influences and compare to last year's findings.

The survey is made possible by primary research sponsor Elanco and contributing sponsors National Chicken Council and WATT PoultryUSA.



Delbert Holzer, Director, Global Market Access, Elanco Animal Health

Holzer is responsible for connecting with retailers and restaurants as well as meat processors. The ultimate goal is to educate people about the role that technology plays in food production.

Additionally, he provides key insight back to Elanco about the needs and desires of consumers through research and the food channel through direct interaction. Prior to Elanco, he worked in the meat industry for 25 years in senior marketing and sales roles for companies like Cargill, JBS, Smithfield and Meyer Natural Angus.



Joyce Neth, VP Audience Development and Research, WATT Global Media

Neth is responsible for creating insights for strategic decisions, audience marketing, product marketing and proprietary research using knowledge from WATT's database of audience behavior and demographics.

Prior to joining WATT in 2006, she held senior research positions at two major-market newspaper companies. She started her career as a marketing

engineer for Westinghouse Electric Corporation.

Neth is a graduate of Allegheny College, Meadville, Pennsylvania, and earned a Master's degree from the University of Pittsburgh.

2:50–3:30 p.m. Fresh prepared foods and poultry: Reshaping the retail perimeter

The perimeter departments of grocery stores are becoming the fulcrum point for maximum retail differentiation, the basis for deeper and more engaging customer experiences, and a retailer focus for space expansion. Fresh Prepared Foods is the fastest growing department on the perimeter, and leaders are using Fresh Prepared Foods to:

- Compete with restaurants and specialty channels
- Create stronger emotional linkages with customers
- Separate from competitors and create dominant brands
- Gain bargaining power with suppliers across the store

Chicken and other proteins are leading the way in building the department sales growth, but navigating these fast currents will require understanding key trends around convenience and food transparency, among others.



Chris DuBois, Senior Vice President and Principal, IRI

DuBois joined IRI in 2011 and is a senior principal who leads sales and marketing efforts for its services that serve fresh food retailers and processors. He also leads IRI relationships with some of IRI's largest fresh food clients as well as its

relationships with industry associations. IRI is a provider of big data, predictive analytics and forward-looking insights that help retailers and media companies to

TOPICS and speakers

grow their businesses. With the largest repository of purchase, media, social, causal and loyalty data, all integrated on an on-demand cloud-based technology platform, IRI helps to guide its clients around the world in their quests to capture market share, connect with consumers and deliver market-leading growth.



Elizabeth Ehrhardt, Executive, IRI Protein Practice

Ehrhardt is a 20-year IRI veteran and leads a major client engagement across consumer, customer, media, technology and advanced analytics groups. She has deep experience in frozen, refrigerated, perimeter and

center of store departments. Before taking her current role, Ehrhardt was the leader of IRI's top twelve client service teams. She has conducted trainings throughout the U.S., India and Europe.

3:30–4:10 p.m. The expanding market for “slow growing” chickens

With Whole Foods' commitment to shift to

only selling so-called slow growing breeds of chickens, we will take a look at this market niche and how it is developing in Europe. From Label Rouge birds in France to “Freedom Food” in the UK or “Chickens of Tomorrow” in The Netherlands, alternative genetics in the form of slower growing breeds are an expanding market niche in many developed countries.



Claude Toudic, EMEA Technical Manager, Hubbard France

Toudic joined Hubbard in 2002 as broiler specialist and became technical manager for the EMEA and Brazil area. Prior to joining Hubbard, he worked for several French poultry integrators as broiler technical manager. His area

of expertise encompasses broiler management and economic modeling. This last point is key for breeding companies who have to develop products meeting various markets' needs. Understanding the needs of each segment of the poultry supply chain, according to the type of market, is a necessity to take the right selection decisions.

Tuesday, July 12

8–9:30 a.m. Chicken purchaser panel discussion: Hear from top executives in major retail and food service companies what their customers are doing and what they are hearing from consumers.

Dean Bradley, Director, Protein Supply, Buffalo Wild Wings

Bradley has over 20 years of experience in the chicken and restaurant industries. He is responsible for all things protein, supplier relationship management and providing leadership to several cross functional



teams among other things.

Bradley held various roles for over 10 years at Gold Kist from Production Supervisor to Sales Manager. He then worked for Agro America for 5 years as Sales Manager handling sales of Chicken, Pork, Turkey and Salmon in the U.S. and Canada.

Prior to being at Buffalo Wild Wings, he spent 4 years as the Director of Purchasing-Protein for Church's Chicken. He holds a B.S. in Business Administration-Management from the University of South Carolina.

TOPICS and speakers

**Chris Chang, CFO, Raising Cane's**

Raising Cane's has 260-plus restaurants in 20 states across the country. Chang serves on a four-person executive team and oversees finance, accounting, supply chain, information technology, legal and risk management. He was previously chief financial

officer of Smashburger, where he helped the company grow from eight restaurants to over 265 restaurants.

Chang has over 17 years of experience working in finance and strategy for restaurant, retail, consumer and financial services companies. He also previously served as a vice president at Consumer Capital Partners, where he focused on private equity investments in multi-unit restaurant and retail concepts. Prior to that, Chang held positions at Vail Resorts, Inc., Goldman Sachs, Thayer Capital Partners and First Data Corporation/Western Union. Mr. Oellinger received his MBA from Harvard Business School and graduated magna cum laude with a B.A. in economics from Dartmouth College.

**Mike Ledford, Director of Food and Beverage Sourcing, Chick-fil-A**

Ledford's primary responsibilities include leading annual sourcing for over \$2 billion in spend management. Prior to joining Chick-fil-A, He was senior director of poultry purchasing role at Restaurant Supply

Chain Services, A Yum! Brands Co-op. In that role he was responsible for poultry sourcing for KFC, Pizza Hut, Taco Bell, Long John Silvers and A&W. In addition to his purchasing responsibilities, Ledford served as vice president of supply chain for KFC. He also served as director of protein for Popeyes Chicken & Biscuits before joining Yum! Brands.

Ledford spent 14 years in the poultry industry holding various positions in operations, sales and sup-

ply chain with Gold Kist Inc. and Seaboard Farms.

He graduated with a BS in Agriculture Business Management from North Carolina State University.

**Stefan Oellinger, Category Merchant/Sourcing for Meat and Poultry, FreshDirect**

Fresh Direct is a 14-year-old leading pure play full service online grocer serving Great New York City, New Jersey and Philadelphia. Mr. Oellinger previously managed a farm-to-fork

premium hormone- and antibiotic-free beef company serving major retailers and food service distributors. He was born in Austria and lived and worked on diversified farm operations until age 23.

Oellinger holds a bachelor's of science degree in agricultural applied economics and management from Cornell University. Oellinger says his roots remain in farming as he continues to own the family farm while pursuing a passion for building value chains that connect ever changing consumer needs with environmentally and economically sustainable producers.

9:45–10:20 a.m. Building a consumer and regulatory intelligence network: A lesson from a key consumer facing brand

Some brands are excellent at seeing the early threads of a consumer trend or activist movement and know where to insert themselves into conversations. Learn how the poultry industry can modify the war rooms and tools of the best known brands to see the early signs of change and better guide the conversation. Learn how using a strategy of big data and deep analytics would have allowed one poultry company to have saved over \$200 million by recognizing a food safety problem well before a recall was initiated.

TOPICS and speakers



**Richard Kottmeyer, Vice President
Agriculture & Food, Luxoft**

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trends and insights into the Future of Food including predicting the rapid growth of antimicrobial chicken demand from Foodservice.

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**Victoria Platt, Associate Partner,
IBM**

Platt is a passionate catalyst in taking business & customer intelligence combined with big data to solve for problems, create opportunities and identify new white space. She is a subject matter expert in CRM, Seller

Experience, Lead Management and Next Generation Personalization. Platt two patents in next generation retail commerce via mobile device and image analytics. She is a frequent speaker on innovation, a lead facilitator in Design Thinking workshops and use case development.

Prior to joining IBM, Platt served at Lowe's Home Improvement, Gemalto and Alcoa.

10:20–11 a.m. How a B2B company engages consumers

Sometimes it seems that the poultry industry is the world's biggest piñata for activist groups, but we aren't alone. Jessica Simmons from Monsanto will explain how this chemical and seed company has chosen to engage consumers directly, and initiate the conversation, even if the consumer isn't their customer. From GMO seeds to chemicals used to control insects and weeds, Monsanto makes products that are both vital to the future of agriculture and attract a lot of activist attention.



**Mike Burger, corporate insights and
measurement manager, Monsanto**

Burger is a 15 year veteran at Monsanto and is a communications specialist having worked on the company's internal communications efforts, leading Corporate Social Responsibility Reporting, and Annual Reporting.

His current work focuses primarily on measuring Monsanto's reputation metrics as well as language strategy, or how to communicate to consumers about Monsanto and the agricultural industry overall.

NOTES

Key learning takeaways from the
2016 Chicken Marketing Summit

THANK YOU to our sponsors





SAVE THE
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2017 **CHICKEN
MARKETING
SUMMIT**

July 16-18, 2017

Omni Grove Park Inn
Asheville, North Carolina



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Chicken Marketing Summit
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