

Improving meat quality and adding value in beef processing

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Brief overview

- Improving meat quality
- Technical innovations
- Adding value in beef processing
- Opportunities

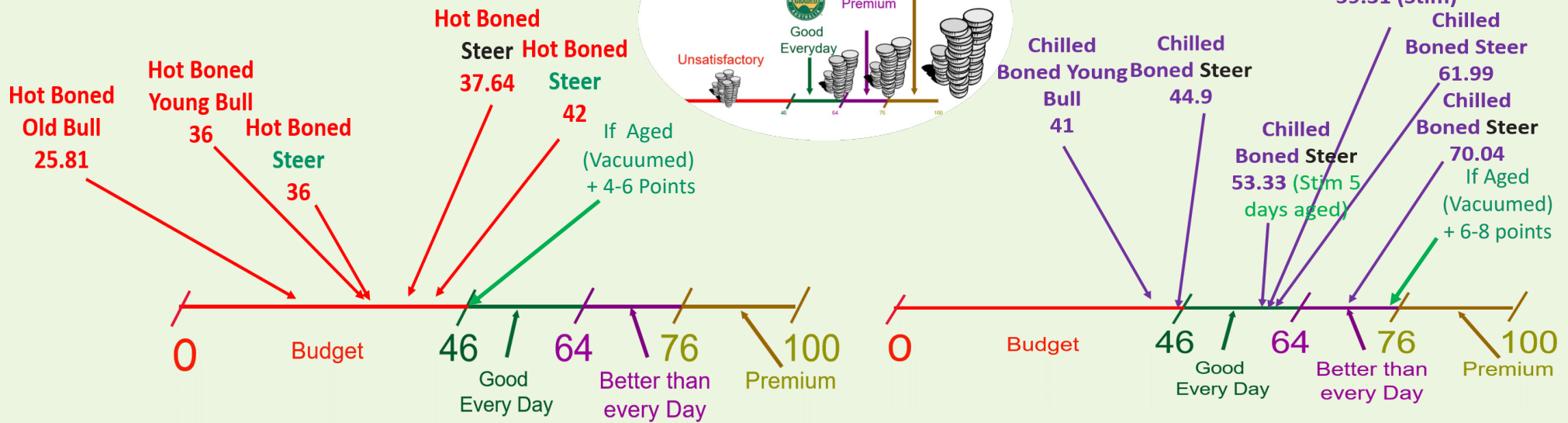
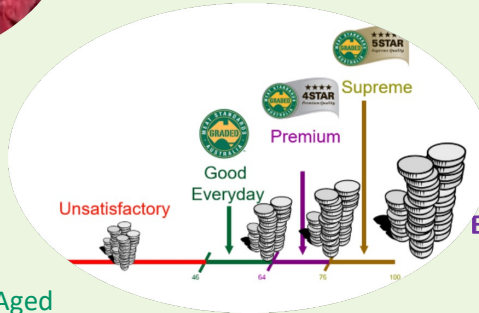
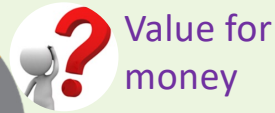


Vietnam currently has four major meat trading pathways incorporating pre & post rigor processing.

1. Traditional hot processed meat traded pre-rigor direct to markets (Tender if cooked pre-rigor- no point of difference by origin)
2. Traditional hot processed meat traded to Retail & Food service outlets post-rigor (Muscle contraction takes place and meat becomes Tougher - no point of difference to consumers)
3. Chilled carcasses processed post-rigor traded to Retail & Food Service (Prevents muscle contraction - Improved Tenderness)
4. Chilled carcasses processed post rigor, tender-stretched, vacuumed & aged (Prevents muscle contraction and optimises Tenderness) - has a valued point of difference.



Blind Taste Tests results: Pre & post rigor processing for retail – **Hot Boning** / Chilled boning - Bulls / Steers



Validation: Eating Quality of Beef

Hot Boned - Cold Boned - Imported Grain-Fed Chilled & Aged products



Validating (Australian Origin Cattle) Vissan Beef Brand - Verses - "Value For Money" to Local and Imported Brands						
Striploin	Brand	VND per Kg	Price % Above Local	Price % Above Vissan	Consumer EQ Score	Explanation
Local Beef	Hot Boned	340,000 đ			31.71	Hot Boned Local Cattle
Live AUS Origin	Vissan Beef	415,000 đ	22.06%		48.17	Cold Boned Chilled Beef
Live AUS Origin	Vissan Beef (Vac 7 days aged)	415,000 đ	22.06%		63.63	Chilled and aged 7 days
Imported A Beef	Aged Vacuummed	479,000 đ	40.88%	18.82%	N/A	Not tested
Imported Grain Fed YG	Aged Vacuummed	499,000 đ	46.76%	24.71%	80.1	Imported Aus. GF





A 'Key Attribute' to Eating Quality: Curfew periods & tTransportation

(prior to processing - the effects to pH and pH declines)

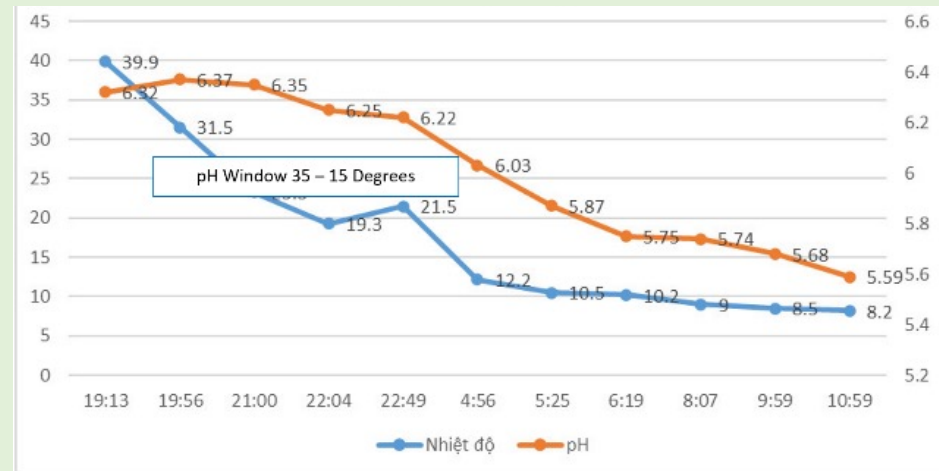
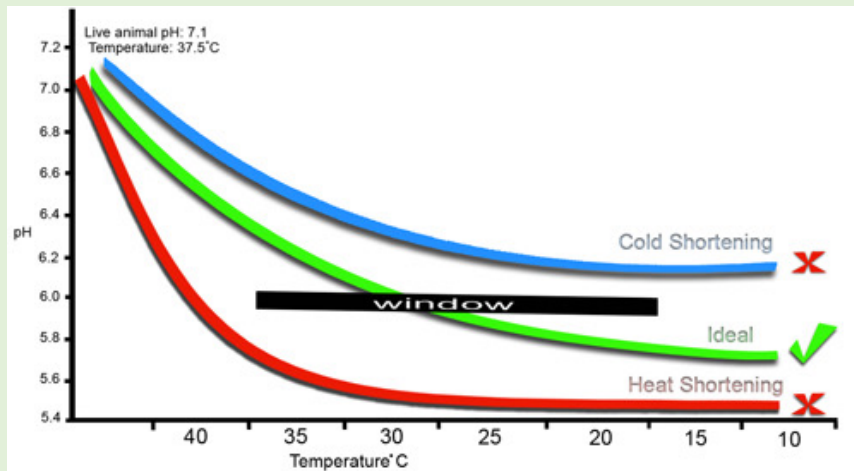
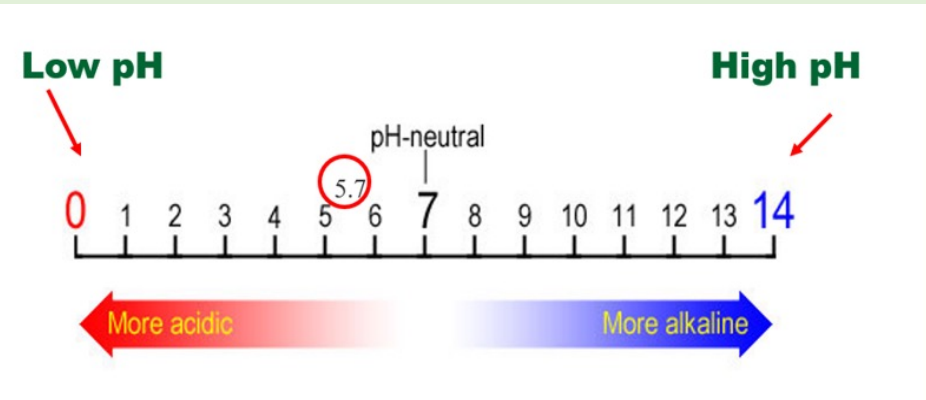


pH Decline

The ultimate pH & pH decline are key attributes for the eating quality in the chilling process.

The effects of curfew and transport can be critical to the depletion of energy, (due to lack of feed over time), which creates issues for the pH decline

This decline will continue until the time off feed is reduced.





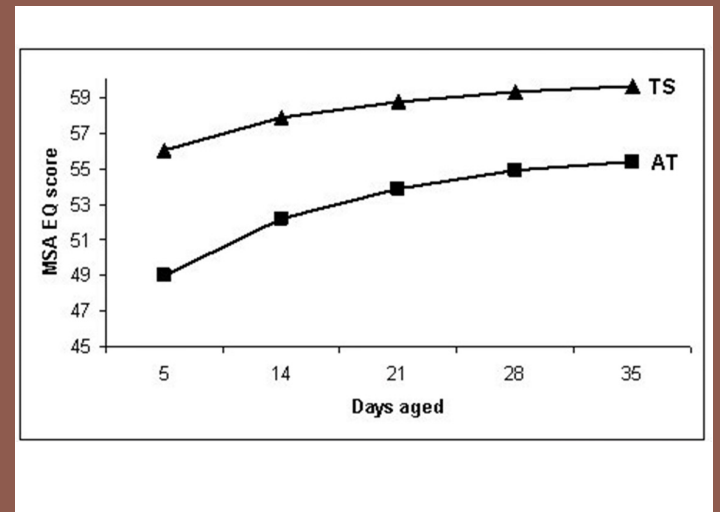
Chilled Beef



KPI Cardboard		VND		USD		Mean Value		Production Cost		Production Cost	
Conversion rate (%)	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000
Production cost per kg	2.50%	82,971,000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000
Production cost per kg	0%	82,971,000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000
Production cost per kg	0%	82,971,000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000
Production cost per kg	0%	82,971,000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000
Production cost per kg	0%	82,971,000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000	100.0000



Tender- stretching



Adding Value

Strategies:

- Communication with end users (*Specification & Description Manual developed*)
- Introduction of Various Brands (*Adding Value*)
- Introduction Eating Quality Tiers (*Good Better Best - Priced accordingly*)
- Creating Value for Money (*consumers*)
- (*Returning Premiums*) for Australian Origin Cattle - processed in Vietnam

Adding Value



PRODUCT DESCRIPTION
VN-AO140 - GAO140

Product Type	Boneless Beef (Australian Origin)
Cut Description	Shortloin
Vietnam Code	VN-AO052
AKK Code	GAO552

Location: The Striploin is located in the Hindquarter lying ventral to the Lumbar vertebrae's and may extend to include the 13th, 12th, or 11th Ribs. The ventral edge is determined by a measurement from the eye muscle at the cranial end.

Specification:		Cut Description	
Product name	Shortloin	Product name	Boneless beef
AKK Code	GAO552	Category	GAO Beef 2-8 teeth
Country of	Vietnam	Fat Depth	10 ml
Points of	Ventral edge 12 ml from eye muscle	Weight	4 kg to 7 kg
Specification	1 to 7	Fat colour	1 to 7
Meat Colour	1 to 7	Net weight	Kilns Yes
Packaging	IW/VAC Yes	Feed Regime	14 days
Refrigeration	Keep Chilled -1° to 2° C	Portion Size	260 grams +/- 10 %
	Keep Frozen after 14 days -15° C	Striploin to Tenderloin ratio:	6.4 / 5.5 / 7.3

Points of Specification:

- Subcutaneous fat 10 ml
- Tail length 12 ml

End Panel Label: Example only

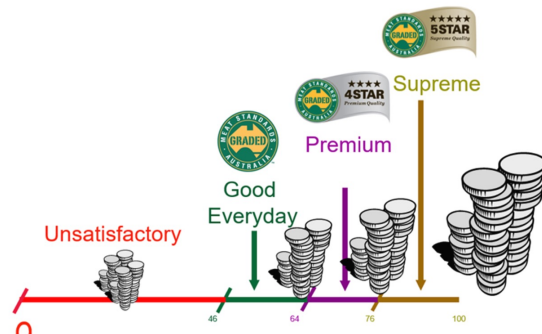
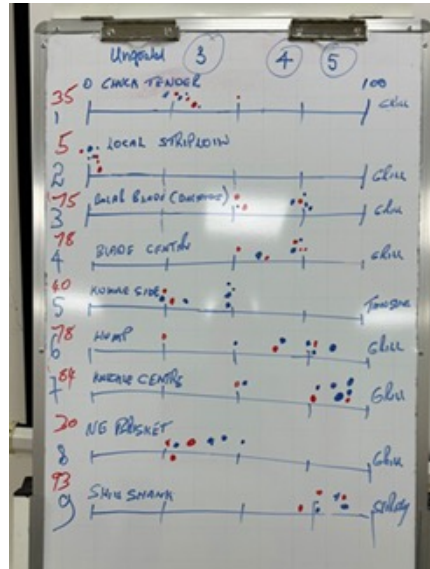
Cooking Methods







Eating Quality Scores



Blind Taste test panels:



Measuring Eating Quality Scores

Eating Quality Scores by Brands		0/10/2023	0/10/2023	Average
Topside	Grill	45		45
Local Striploin	Grill	10	49	34.5
Knuckle Side	Grill	40		40
Knuckle Centre	Grill	62		62
Cube Roll	Grill	83		83
Knuckle Side	Grill/Thin Slice		40	40
Knuckle Centre	Grill		46	46
Cube Roll	Grill		95	95
Shin Shank	Stir Fry		75	75
Knuckle Side	Stir Fry		80	80
Knuckle Undercut	Stir Fry		70	70
Knuckle Try Tip	Stir Fry		50	50



Opportunities:

Improved product presentation by cooking methods

Increased profit by product utilisation - to optimal cooking method

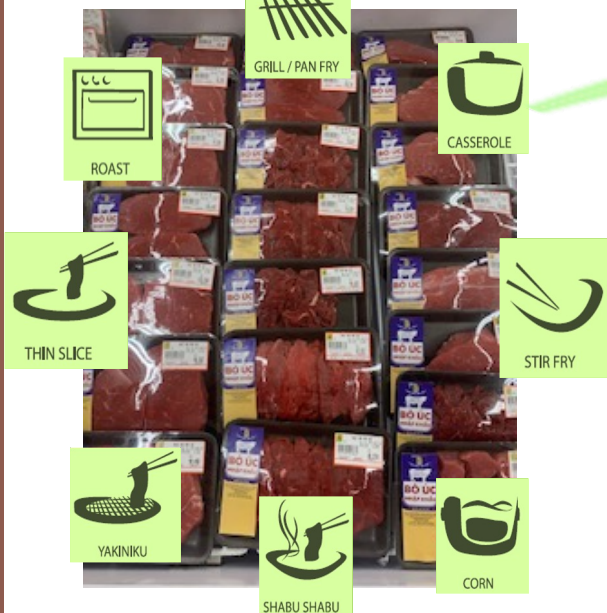


Retail

Product name	KG	Wholesale price		Wholesale \$ cost
Bolar Blade	5.040	VND 200,000		VND 1,008,000
VALUE ADDED				
Product Name	Weight (kg)	Cook Method	Sale Price (\$/kg)	Return (\$)
Blade center	1.500	Grill	VND 350,000	VND 525,000
Detoildeus	1.076	Grill	VND 350,000	VND 376,600
Trim (mince)	1.366	Mince/HotPot	VND 214,000	VND 292,324
Fat & Sinue	0.954		VND 150,000	VND 143,100
	0.000		VND -	VND -
	0.000		VND -	VND -
Total Saleable Meat	4.896	Total Return		VND 1,337,024
Waste & Weep	0.144	Gross Profit		VND 329,024
Cost of saleable Meat Kg	VND 205,882	Gross Profit %		24.61%

Average Salable Price VND 265,283

Alternative Method as per tables	Cost Price	Average Sale Price	Waste	Gross Profit Per Kilo	Gp %	Eating Quality	Outcome
Knuckle	VND 230,000	VND 276,329	7.63%	VND 46,329	16.77%	84	Only sell for hot pot
Hump	VND 200,000	VND 257,091	13.24%	VND 57,091	22.21%	78	Rearly sell
Shink/Shank	VND 180,000	VND 182,550	25.16%	VND 2,550	1.40%	93	High sales Low profit
Chuck Tender	VND 200,000	VND 268,324	2.34%	VND 68,324	25.46%	35	High Gp Fails as Grill
Navel End Brisket	VND 180,000	VND 226,866	2.28%	VND 46,866	20.66%	30	Fails as Grill
Bolar Blade	VND 200,000	VND 265,283	2.86%	VND 65,283	24.61%	78	Don't Sell at all
Oyster Blade	VND 220,000	VND 283,043	6.71%	VND 63,043	22.27%	95	Sueneue on 84



**Data collected indicated:
Sales increased when POS
material, product display
& sampling are conducted
in store.**

**Australian Beef Sales commonly
increased by 47% to 75% of total beef
sales on the days the data was
collected.**

Summary of Opportunities: Australian live cattle trade, and chilled, frozen beef

Stakeholders can pursue the challenges of an advanced supply chain approach by commercially adding value through:

- Feeding of cattle
- Locally processing Australian origin cattle (as a competitive point of difference for Vietnam consumers in traditional markets)
- Collectively producing and creating products that are consumer driven by demand - in retail and food service, (as a valued point of difference)
- Australian origin cattle processed as chilled beef and imported Australian - Chilled & frozen beef by:
 - Collectively evaluating commercial outcomes - through utilisation of secondary primals by cooking method
 - Collectively delivering - in-store product sampling and POS Material: promoting Australian Origin cattle processed chilled in Vietnam - and Imported Australian Chilled Beef



Thank You

Any Questions?

