

INDIANA STATE EGG BOARD



ANNUAL REPORT 2014-2015

**Indiana State Egg Board
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A MESSAGE FROM THE EXECUTIVE ADMINISTRATOR

Mark Straw

The staff of the Indiana State Egg Board continues to dedicate themselves to the mission of our agency. Staff conducted over 9700 inspections and evaluated over 150,000 dozen eggs for quality. The inspection activity resulted in the removal of nearly 48,000 dozen eggs from sale with over 87% of the violations resulting from restricted eggs or those that did not meet the required quality standards for sale in Indiana.

During the past year our staff devoted some of their inspection time visiting farm markets to observe practices, identify any issues, and to educate vendors on the egg law. The largest challenge identified was that only 1 in 5 coolers used to transport and or store eggs was at the required temperature of 45 degrees F or below. Additionally we learned that the level of knowledge on egg handling and processing is very limited.

The Avian Influenza outbreak that occurred in early 2015 had a significant impact on our inspectional activities. All federal work involving visits to poultry operations was ceased. This stoppage in work resulted in a 25% drop in federal revenue with no inspection activity during most of the third quarter and the entire fourth quarter of FY 15. We worked with the Indiana State Poultry Association to help educate small flock producers about Avian Influenza and the importance of reporting any unusual mortality.

We are also observing an increase in direct to consumer sales through the internet and Community Supported Ag memberships. Unfortunately, the movement is opening the door for the purchase and resale of eggs verses the production and sell of eggs. Vendors are buying eggs on the open market and often times repackaging/rebranding them as if they were from their own production. The practice of repackaging is not legal unless it is conducted at a location that is registered as a USDA grading station.

As in previous years, we continued to conduct inspections for the USDA Country of Origin Labeling Program, USDA's Commodity Grading Program and Shell Egg Surveillance program, and the FDA SE Egg Rule Farm inspections.

The goal of the Indiana State Egg Board is to maintain a safe and wholesome shell egg product for the consumer and do it as efficiently as possible. This annual report is designed to share information relative to the activities of the ISEB and its staff. We hope that the information serves to enlighten the reader in regard to the accomplishments of the ISEB.

Our exceptional staff continues to be our strongest asset. They have taken on more responsibilities as we have added additional inspection programs while not having a negative impact on our core mission. They are well respected throughout the state and nationally as they participate in training and educational

activities. I want to publically thank each member of our staff for their exceptional effort and professional attitude.

I would like to take this opportunity to thank the board members for their support and dedication to the shell egg industry, the Indiana State Egg Board, and to me personally. As a result of their support, the future of the Indiana State Egg Board is bright.

Program Overview:

From its establishment over 75 years ago, the mission of the Indiana State Egg Board (ISEB) has remained the same: provide consumers in Indiana a safe, wholesome shell egg. Shell eggs are monitored by our field staff from the site of production to the retail store, assuring Indiana's citizens the highest quality protein product possible.

The Egg Board has oversight by nine directors appointed by the Governor. These directors represent the various segments of the shell egg industry and include the consumer, restaurant industry, retail/grocers, wholesalers, processors and producers. The board meets quarterly to offer guidance to staff, develop policy, and approve expenditures.

All eggs produced and marketed in Indiana must meet federal standards established for shell eggs. The U. S. Standards, Grades, and Weight Classes for shell eggs, established by the U. S. Department of Agriculture, have been adopted by the Indiana State Egg Board. They are enforced by the field staff through their daily inspection activities at Indiana shell egg processing plants, distribution warehouses, and retail stores.

Anyone who wishes to distribute eggs in the state of Indiana must register with the ISEB. Additionally, anyone who wishes to sell shell eggs directly to the consumer at a location that is not on the farm of production must register. All registrations are renewed on an annual basis. In addition to the annual registration fee, wholesale registrants must report the volumes of product distributed in Indiana and pay a \$.11 per case (30 Doz.) fee to offset the cost of inspection activities and program administration.

The program not only protects the consumer but also supports the shell egg industry. The establishment and enforcement of standards for everyone in the shell egg business maintains a level playing field. Indiana is the third largest egg producing state, with approximately 26 million laying hens. The more than six billion eggs produced are marketed in all parts of the country. (Additional information on the Shell Egg Industry can be found in Appendix 1: Egg Industry Fact Sheet.)

Registration Activities:

The Indiana Egg Law requires the annual registration of anyone who wishes to sell shell eggs in Indiana. Licensing is required for every wholesaler distributing eggs to a retailer, hotel, restaurant, hospital, nursing home, school, state or federal institution in the state of Indiana. Additionally, every retailer who desires to sell shell eggs to the consumer must be registered. During the 2014-2015 fiscal year, the ISEB licensed 5265 retailers and 318 wholesalers.

There are currently four categories of retail registration. The Farm Market retail license is designed for small producers who market their own eggs directly to the consumer through a farmers market venue. As defined in IC 16-42-11-1.1, a Farmers Market “means a common facility where two or more farmers gather on a regular basis to sell farm products, which they produce, directly to the consumer. The other three permit categories are designed for the traditional retail environment with the only differentiation between them based on average weekly sales volume of cases (1 case = 30 dozen). The retail license categories and associated annual fees are:

Farm Market retail	\$20
< 5 cases/wk.....	\$30
5 – 50 cases/wk.....	\$50
>50 cases/wk.....	\$100

The annual wholesale license is also a volume based registration. The wholesale license categories and associated fees are:

< 5 cases/wk (not own production)	\$50
>5 – 250 cases/wk.....	\$90
>250 – 500 cases/wk.....	\$120
>500 – 1,000 cases/wk.....	\$150
>1000 cases/wk.....	\$200

An annual combination Wholesale/Retail permit is available to small producers who market eggs which they produced. The combination permit allows a small producer to wholesale and retail under the same permit, as long as they distribute/sell fewer than 150 dozen eggs per week.

Farmers market wholesale/retail, < 5 cases/wk.....	\$50
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Retail Permits:

When looking at retail registration trends over the past 10 years (Graph 1), registration numbers have shown a steady increase. The most significant increase in retail permits over the past year was in the very small retail/convenience store segment and the largest retail stores. The large retail store growth was likely due to a significant increase in the number of specialty stores. This segment grew by 5%. Historically, growth has been in the farm market segment, which has maintained registration numbers over the past year. It is interesting to note that while the total number of farm market registrants has remained at previous year's levels, we find that the number of new registrants is relatively high.

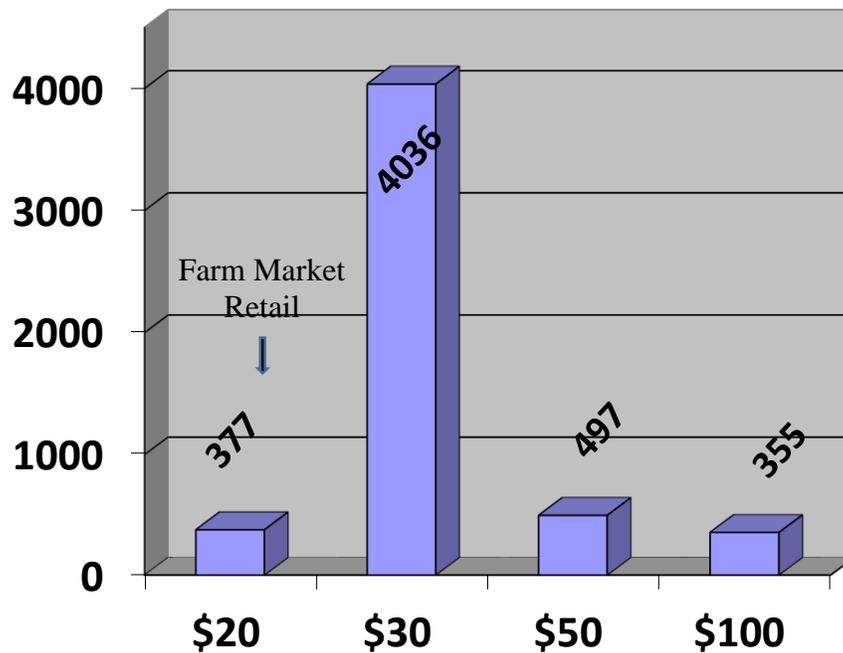
Graph 1: Annual Retail Registration



Graph 2 illustrates the license distribution of the 5265 registered retailers. We had 377 registered farm market retailers and over 4000 small retailers who sell fewer than 5 thirty dozen cases per week. A majority of the small registrants are convenience stores. The combination of these two groups represents over 84% of our retail registrants. Upon further review of these retailers, we find that the majority of them sell less than one case of eggs per week.

Graph 2: Retail License Distribution

2014-15 Retail Registration by License type



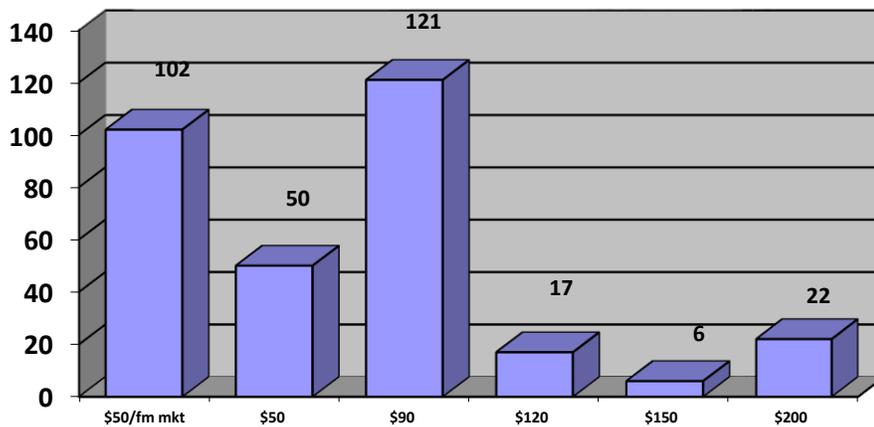
When looking at the group of retailers selling more than five cases per week (\$50 and \$100 levels), we find that nearly 70 % are moving volumes greater than 10 cases per week with some retailers exceeding volumes of 100 cases per week.

Those retailers selling > 5 cases per week represent 16 % of the retail licenses issued. Based on estimated sales volumes, this small group of retailers markets nearly 85 % of the eggs sold to the consumers of Indiana. Our data indicates a shift in the retail grocery segment that has resulted in more large volume retailers, fewer mid-sized retailers, and a continuing increase in very small retailers.

Wholesale Permits:

We currently have 318 registered wholesalers. The largest growth category was for farm market retail/wholesale combination permits. This segment represents producers who are selling their own eggs at the farm market in a retail setting, as well as, wholesaling to a restaurant or other retail location. In the past two years, the number of small flock wholesalers has doubled. The number of registrants in all other categories of wholesalers remained close to previous year levels.

Graph 3: Wholesalers by Volume Sold



As illustrated in Graph 3, we had 102 registrants with a farmers market wholesale/retail combination permit. There are 152 wholesalers distributing fewer than five 30 dozen cases of eggs each week. The number of out of state wholesalers has remained stable at around 35% of wholesalers.

INSPECTION ACTIVITIES:

Four inspectors and two administrative staff are charged with enforcing the Egg Board's regulations. Staff is strategically located around the state with each inspector being responsible for approximately 1300 retailers within their assigned geographic areas. Additionally, all in-state wholesalers are visited on a regular

basis to assure compliance with the regulations. Table 1 documents the activities of staff from July 1, 2014 to June 30, 2015.

Table 1: Quarterly Inspection Data

	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	TOTAL
Inspection:					
Retail	2,343	2,387	2,566	2,129	9425
Wholesaler	38	50	30	27	145
Egg Rule	0	0	0	3	3
Bakery	0	0	1	0	1
Other	22	1	2	2	27
Surveillance	22	13	16	4	55
School Lunch	2	8	2	1	13
COOL	21	6	0	6	33
Total Inspections	2448	2465	2617	2172	9702
Dozens Inspected:					
State	30,687	35,838	42,042	37,420	145,987
Federal	<u>1,469</u>	<u>1,080</u>	<u>1,652</u>	<u>267</u>	<u>4,468</u>
Total Dozen Inspected	32,156	36,918	43,694	33,576	150,455

Retail inspection activities are primarily targeted at the larger metropolitan areas of the state, and retailers in these areas are visited two times per year. The more rural areas of the state receive visits at least once annually. On average, each field staff conducts ten inspections per day while traveling approximately 90 miles.

In addition to inspection work at the retail and wholesale level, the staff conducts unannounced inspections at many of the 23 shell egg processing plants and grading stations in Indiana, enforcing the Egg Products Inspection Act. The visits are conducted a minimum of once each quarter. All field staff are licensed by the U.S. Department of Agriculture to conduct these activities. The Egg Products Inspection Act controls the disposition of inedible and restricted eggs, which do not meet the requirements for consumer use. During these inspections, cooler temperatures are checked to assure adherence to the 45 degree storage temperature requirement, and carton and case labeling is checked to assure refrigeration information requirements are met. Eggs which do not meet the established requirements during these inspections are retained, and must be either brought into compliance or shipped to an approved egg products processing plant to be further processed. In the 2014-15 fiscal year, inspectors retained 14,273 dozen shell eggs under this authority. Additional responsibilities under this authority include the annual inspection of 11 hatcheries and two cooking facilities.

The Indiana State Egg Board staff is also licensed to conduct destination poultry inspections for the U. S. Department of Agriculture. Inspections are conducted at food storage warehouses contracted to handle eggs, poultry, and other commodities for distribution to schools and the several nutrition assistance programs around the state. Fourteen such inspections were conducted in 2014-2015. More than 290,000 pounds of poultry was certified as wholesome during these inspections.

The Food and Drug Administration contracted with the ISEB to conduct 20 farm inspections for compliance with 21 CFR 118 "Prevention of Salmonella Enteritidis in Shell Eggs During Production, Storage, and Transportation". This was our fourth annual contract with FDA. Due to a stop work order issued after the HPAI outbreak, we were only able to complete four inspections for FDA.

Violations/Compliance issues:

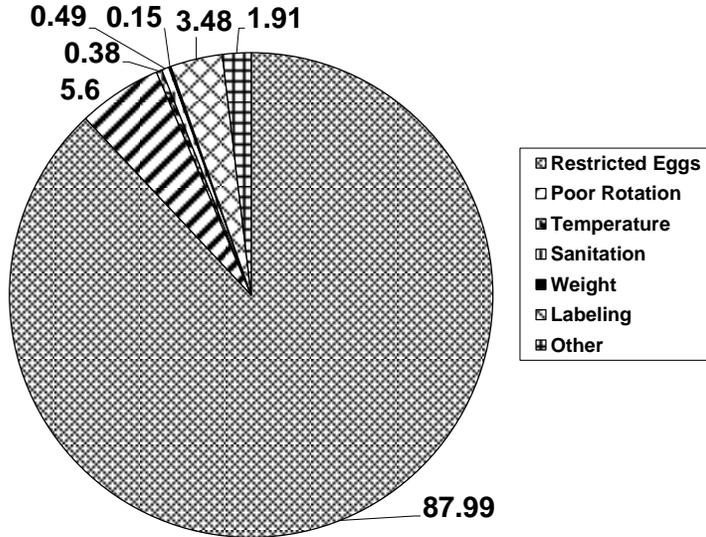
Although most of the retail and wholesale inspections are completed without incident, occasionally situations arise during these inspections that result in removal of eggs. Violations can be a result of any one of the following situations:

- **Restricted Eggs:** Dirties, cracked, bloody, or inedible eggs
- **Poor Rotation:** Eggs are past expiration date
- **Temperature:** Storage or display area is above 45° F or below freezing
- **Sanitation:** Storage or display is in an unsanitary condition
- **Weight:** Egg weights are below USDA standards
- **Labeling:** Not in compliance with labeling requirements
- **Other:** Can include not posting license, missing eggs, buying from a non-registered wholesaler

In 2014-15, inspectors removed 38,965 dozen eggs from sale. The majority of removals were a result of restricted eggs. A breakdown of the percentage of violations reported is shown in Graph 4.

Graph 4: Violations Resulting in Egg Removal

% Violations By Type



When looking at violation data represented as a percentage of total violations (Table 2) from 2010 – 2015, restricted egg issues continue to be the largest problem.

Table 2:

Summary Table: % of violations recorded

	<u>2010-11</u>	<u>2011-12</u>	<u>2012-13</u>	<u>2013-14</u>	<u>2014-15</u>
Restricted Eggs	88.59	89.19	86.77	87.05	87.99
Poor Rotation	4.32	4.29	6.21	5.62	5.60
Temperature	.83	.42	.29	.11	.38
Sanitation	.48	.53	.80	1.52	.49
Weight	.20	.05	.23	.16	.149
Labeling	3.39	2.89	2.99	3.07	3.48
Other	2.18	2.62	2.70	2.46	1.91

Poor product rotation and labeling violations continue to be the second and third most common violation, respectively. The amount of eggs being offered for sale after the expiration date continues to be an issue. This violations is most often seen in convenience stores that typically move low volumes of eggs and the specialty egg sections offered by larger retailers, since specialty eggs tend to stay on the shelf longer. High Path Avian Influenza had a dramatic impact on the egg market and where eggs were being shipped. We believe that this industry challenge led to the increase in labeling issues, which are most commonly a result of incorrect expiration

date on product being distributed from other states. Most in state labeling issues are a result of small flock producers who have incomplete labels.

Overview of additional observations:

Indiana Farm Market Observations

Through the summer of 2014, the Indiana State Egg Board staff visited with farm market vendors at various locations throughout the state. The visit was conducted as an inspection with findings documented and then corrective actions discussed with vendors as opposed to taking regulatory action.

Variables of particular interest reviewed by staff included; refrigeration methods, temperature of storage containers at the point of sale, carton labeling, carton materials, new or used cartons, egg temperature and cleanliness of eggs.

Several of the significant observations include:

- 90 % of vendors make an attempt to refrigerate eggs at the point of sale.
- Coolers with ice or ice packs were the primary storage method at the point of sale.
- Only 1 in 5 coolers were being held at or below the required 45 degree F ambient temperature.
- In coolers that met the temperature requirements, egg temperature was near or below 45 degrees F.
- 55 % of vendors sold eggs in used cartons.
- 50 % of the vendors had one or more labeling issues with their cartons.
- 1 in 4 vendors utilized a cleaning method that involved submersion of eggs in water.

In looking at these observations, we are confident that most farm market vendors want to comply with the law. The issues of most concern are the inability of coolers to maintain an acceptable temperature and the potential bacterial cross contamination of eggs resulting from submersing eggs as a cleaning practice.

Suggested management practices to consider:

- Refrigerating eggs below 45 degrees F as soon as possible after collection and cleaning and for at least 24 hours prior to the market will significantly increase refrigeration compliance rates. *(When egg surface temperatures were 45°F or below, the ambient air temperature was 5 times more likely to be in compliance)*
- Clean eggs as soon as possible after collection and utilize a cleaning method that does not involve submersion of eggs in water. Utilize potable

- running water that is 20 degrees F warmer than the eggs. (Feels warm when you run across your wrist.)
- Utilize new cartons whenever possible. This reduces the likely hood of mislabeling by not removing previous supplier information. Additionally, identifying the farm of production is much easier.

Refrigeration during transportation:

In 2014, USDA/FSIS issued an update to Directive (8010.1) “Methodology for Conducting In-commerce Surveillance Activities” which modified the procedures for taking ambient air temperature in transport vehicles hauling shell eggs. The updated procedure called for documenting three separate temperatures taken at various locations in the transport vehicle.

Based on some industry concerns over the procedures for taking three temperatures, as well as, recent product retentions for temperature violations around the country, the ISEB cooperated on a study looking at transportation vehicle temperatures and variables that may impact that temperature.

The key take away points from this project included:

- Loading a transport vehicle with freshly packed shell eggs makes it extremely difficult for a refrigeration unit to maintain ambient air temperature throughout the entire vehicle. Therefore, the location of temperature validation by an FSIS representative is critical.
- Opening a trailer door during an inspection causes a significant change in ambient temperature. It was determined that once a trailer door is opened for less than 1 minute that the refrigeration system could take 15 minutes or longer to reach equilibrium at the rear of the trailer. This is highly dependent on outside air temperature.

Other Observations:

The number of specialty brands/specialty foods stores continues to grow. This growth stimulates a rise in the number of small producers who are marketing or trying to market their eggs through these outlets.

More specialty eggs have also increased the number of samples required to conduct a complete inspection of a retail location, thus increasing the time needed to conduct an inspection.

Conclusions and Implications:

- The Indiana State Egg Board is efficient in conducting inspections as is evidenced by the over 9,000 inspections conducted with only 4 regional field staff.
- We continue to observe an increase in large specialty supermarkets that are focusing on the local food movement to pull customers. As a result, we have seen an increased focus on sourcing eggs from local producers.
- Trends indicate a continued increase in the number of small wholesalers, mostly small producers wishing to wholesale some of their excess production.
- Farm market observations gleaned in the summer and early fall 2014 suggest that the knowledge of producers relative to processing and handling is lacking. We need to do some follow-up work in the summer of 2015 to determine if our efforts at Farm markets has had any impacts on farm market vendors.

**INDIANA STATE EGG BOARD
FINANCIAL STATEMENT
FISCAL YEAR JULY 1, 2014 – JUNE 30, 2015**

Beginning Cash Balance.....	\$ 644,442.84
Income	\$ 635,110.23
Expenses:	
Salaries/Benefits.....	\$ 402,702.06
Travel	\$ 38,779.04
Automobile Purchased	\$.00
Printing and Duplicating.....	\$ 1,913.70
Postage	\$ 3,171.90
Telephone	\$ 5,106.39
Board Expense	\$ 3,271.34
Office Expense	\$ 920.02
Computer/Computer Supplies	\$ 1,783.94
Grading Supplies	\$ 735.81
Education/Memberships	\$ 500.00
Rent.....	\$ 148.44
Overhead.....	\$ 22,598.85
Other.....	\$ 1,734.53
Total Expenses	\$ 483,366.02
Net Loss	\$ (151,744.21)
Year-end accounting adjustments	\$ (1,192.82)
Ending Fund Balance.....	\$ 797,379.87

EGG BOARD INSPECTION STAFF

The Executive Administrator is charged with the overall supervision of the field staff and inspection activities, and acts as liaison with the U. S. Department of Agriculture and the several inspection programs involved between the two agencies. Candy Byers, Assistant to Executive Administrator, is responsible for licensing, audit fee reporting and collection, and State Coordinator for the Country of Origin Labeling Program. Each field staff is responsible for inspection activities in their respective geographic area of the state. Following is a description of each region and responsible personnel.

NORTHEASTERN DISTRICT

Mr. Darrel Johnson has been with the Egg Board since November, 1984. Darrel is responsible for the northeastern district which consists of the following 21 counties: Adams, Allen, Blackford, DeKalb, Elkhart, Fulton, Grant, Howard, Huntington, Jay, Kosciusko, LaGrange, Marshall, Miami, Noble, St. Joseph, Steuben, Tipton, Wabash, Wells and Whitley.

NORTHWESTERN DISTRICT

Mr. Robert "Andie" Mears started working with the Egg Board in February 2010. Andie is responsible for the northwestern district which consists of the following 22 counties: Benton, Boone, Carroll, Cass, Clay, Clinton, Fountain, Hendricks, Jasper, Lake, LaPorte, Montgomery, Newton, Parke, Porter, Pulaski, Putnam, Starke, Tippecanoe, Vermillion, Warren and White.

SOUTHERN DISTRICT

Mr. Scott Ratliff has been with the Egg Board since February, 1999. Scott is responsible for the southern district which consists of the following 33 counties: Bartholomew, Brown, Clark, Crawford, Daviess, Dubois, Floyd, Gibson, Greene, Harrison, Jackson, Jefferson, Jennings, Johnson, Knox, Lawrence, Martin, Monroe, Morgan, Ohio, Orange, Owen, Perry, Pike, Posey, Scott, Spencer, Sullivan, Switzerland, Vanderburgh, Vigo, Warrick, and Washington.

CENTRAL DISTRICT

Mr. Robert "Bob" Haynes started with the Egg Board in April 2012. Bob is responsible for the central and east-central portion of the state and includes the following 16 counties: Dearborn, Decatur, Delaware, Fayette, Franklin, Hamilton, Hancock, Henry, Madison, Marion, Randolph, Ripley, Rush, Shelby, Union and Wayne.

2015 Annual Report, Indiana State Egg Board

Appendix 1: United Egg Producers: General Egg Stats

General US Stats

Egg Industry Fact Sheet
Revised November 2014

United States shell egg production totaled 8.44 billion during October 2014, up 2 percent from last year¹.

Table egg flock size on October 1, 2014, was 303 million layers. Rate of lay per day on October 1, 2014, averaged 77.4 eggs per 100 layers².

The five largest egg producing states represent approximately 51 % of all U.S. layers³.

Currently, the top ten egg producing states (ranked by number of layers represented in thousands) are².

**1. Iowa – 58,100 2. Ohio – 29,733 3. Indiana – 26,629 4. Pennsylvania – 24,089 5. California – 15,234
6. Texas – 14,760 7. Michigan – 12,688 8. Minnesota – 10,583 9. Georgia – 9,550 10. Nebraska – 9,342**

To date, there are approximately 171 egg producing companies with flocks of 75,000 hens or more. These companies represent about 99 percent of all the layers in the United States. In 1994, there were around 350 companies with flocks of 75,000 hens or more³.

Presently, there are approximately 64 egg producing companies with 1 million-plus layers that represents approximately 87 percent of total production and 17 companies with greater than 5 million layers²

As of May 2014, organic and cage-free shell egg production accounted for 5.7% of the current table egg layer flock (16.6 million hens). Of this, 2.8% are organic (8.1million hens) and 2.9% are cage-free (8.5 million hens)⁴

Per capita consumption is a measure of total egg production, less exports, divided by the total population. It does not represent demand². (USDA has recently adjusted data to reflect 2000 Census figures)

1998	1999	2000	2001	2002	2003
239.7	249.8	251.7	252.8	255.9	254.7
2004	2005	2006	2007	2008	2009
257.1	255.4	258.1	251.7	248.3	248.4
2010	2011	2012	2013	2014	
249.3	250.0	254.2	255.1	261.1 (est.)	

USDA's Per Capita Consumption figures show egg consumption as the highest in 7 years. The egg industry has added nearly 7 eggs per person in consumption over the last two years.

Of the 229.0 million cases (estimated) of shell eggs produced in 2013:

- 73.3 million cases (32.0%) were further processed (for foodservice, manufacturing, retail and export);
- 122.1 million cases (53.3%) went to retail;
- 22.9 million cases (10.0%) went for foodservice use; and
- 10.7 million cases (4.7%) were exported.

In 2013, the United States exported a total of 349 million dozen eggs, which includes shell eggs, plus processed egg products in shell egg equivalents – a 27.4% increase since 2012⁵.

⚠ Exports of processed egg products for the first three months of 2014 were 14,145 metric tons (MT) valued at \$38.26 million, up 33.3 and 21.7 percent year-on-year, respectively. Table egg export quantity was 34.84 million dozen, up 6.4 percent year-over-year, export value reached \$37.21 million, 20.6 percent².

1. [The National Agricultural Statistics Service's Chicken & Eggs' Report](#), USDA. 2. [The World Agricultural Supply and Demand Estimates Report \(WASDE\)](#), USDA. 3. American Egg Board. 4. USDA Poultry Market News & Analysis 5. USAPEEC.

Indiana State Egg Board Board of Directors

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Indiana Retail Council

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