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# Byron Center Meats

March 17, 2018

## Packaged Red Meats

> \$43 BIL industry

Sales going forward “largely stagnant”

- Decline in consumption frequency
- Choice of other proteins, largely poultry

Mintel Packaged Red Meats US February 2017

## Packaged Red Meats

Expected 2011-2021 sales declines over health concerns

- Beef – poultry and protein alternatives
- Pork – poultry and protein alternatives; oversupply

Mintel Packaged Red Meats US February 2017

## Consumers

Red meat is an important  
source of vital nutrients  
(37%)

# Packaged Red Meats

Brand Sales (4.5%)

Tyson (14.4%)

Cargill (7.6%)

Hormel (2.4%)

Mintel Packaged Red Meats US February 2017

# Packaged Red Meats

Private label

Biggest market share (44%)

Mintel Packaged Red Meats US February 2017

# Packaged Red Meats

## Claims

- Claims outpaced “free from”

Sustainable, environmentally conscious

## Ethical

Mintel Packaged Red Meats US February 2017



# Packaged Red Meats

Allergen-free

Biggest group

2012-2016 meat product launches

(51% gluten-free)

Mintel Packaged Red Meats US February 2017

# Packaged Red Meats

Example:

Nature's Rancher  
Beef Meatballs

Animals raised Global Animal Partnership Certified

Mintel Packaged Red Meats US February 2017

# Packaged Red Meats

## Other red meats

- Lamb
- Ostrich
- Buffalo/bison
- venison

Mintel Packaged Red Meats US February 2017

# Packaged Red Meats

Other red meats - challenges

- Unknown to consumer
  - Hard to find
- Often higher priced
  - Food service

Mintel Packaged Red Meats US February 2017

## Consumers - Any meat consumption

- Refrigerated ground beef 88%
- Refrigerated beef portions 86%
  - Pork 83%
  - Frozen ground beef 79%
    - Whole ham 77%
  - Frozen beef portions 76%
    - Lamb 41%
    - Venison 33%

Mintel December 2016

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# Meat/poultry consumption

All	Race (highest)
Beef (88%)	White 89.6
Fresh chicken (82.7%)	White 83%
Pork (72.5%)	White 74%
Frozen chicken (48.6%)	Black 53.7%
Fresh turkey (40.5%)	Black 52.9%
Frozen turkey (28.5%)	Black 32.7%

# Consumers

I always look for the freshest ingredients when I cook:

- Asian 35%
- White 28%

Mintel Packaged Red Meats US February 2017

# Consumers

I try to eat healthier these days:  
(by region)

- Northeast 26.4% (highest)
- Midwest 20.8% (lowest)

Mintel Packaged Red Meats US February 2017



## Hispanics 20%\* of population

- Pork and ham over index
- Also lamb, buffalo/bison, ostrich, esp. millennials
- Cargill “Rumba” brand – beef, cheekmeat, kidney, liver, bones etc.

\*nearly 1/4 of the younger generation is Hispanic

Mintel Packaged Red Meats US February 2017

# Hispanics

## Cuisine tie-in

- 90% of weekly meat-eaters eat Mexican food
- And, >50% made meals at home

Mintel Packaged Red Meats US February 2017

# Age

## Cuisine tie-in

- 90% of weekly meat-eaters eat Mexican food
- And, >50% made meals at home

Mintel Packaged Red Meats US February 2017

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## What type of meat snacks would you prefer to buy?

- Spicy 45%
- Snacks from prime cuts 41%
- Meat snack variety pack 38%
- Asian flavors 37%
- Grass fed 28%
- Meat snack bars 27%
- Preservative free 26%
- Humanly-raised 24%
- Meat snack trail mixes 24%
- Artisanal, small batch 18%
- Uncured 12%

Mintel Salty Snacks US April 2017

# Hot dogs and sausages

Purchased by 73%

- Any hot dog (43% red meat; 21% poultry; 10% meat alt. ) 58%
- Any sausage 56%
- Any breakfast sausage (26% red meat; 18% poultry; 10% meat alt.)
- Any dinner sausage (25% red meat; 18% poultry; 8% meat alt.)

Mintel Hot Dogs and Sausages US October 2017

# Hot dogs and sausages

When do you eat?

- Dinner 59%
- Cookout 55%
- Lunch 50%
- Breakfast 37%
- Ingredient 26%
- Pizza topping 24%
- As a snack 24%

Mintel Hot Dogs and Sausages US October 2017

# Hot dogs and sausages

Which of the following are you interesting of seeing more of in hot dogs or sausages?

- Smoky flavors 39%
- Premium products 35%
- Wood smoked 34%
- Spicy flavors 33%
- Cheese ingredients 30%
- Gourmet meats 24%
- Peppered varieties 22%
- Fruit flavors 10%

Mintel Hot Dogs and Sausages US October 2017

# Free-from Food Trends

Consumers: which food claims would you like to see more of?

- Hormone free (46%)
- Antibiotic free (43%)
- MSG free (39%) (older consumers)
  - Sulfite free (20%)
  - Phosphate free (18%)

Mintel Free-from Food Trends US October 2017



# Free-from Food Trends

Consumers said:

Free-from foods are too expensive by age:

18-35 40%

55+ 25%

Mintel Free-from Food Trends US October 2017

# Free-from Food Trends

I prepare a different meal for person with food allergies in my household:

26% child <5

29% child 6-11

24% child 12-17

10% 18+

Mintel Free-from Food Trends US October 2017

## Healthy Dining (Out) Trends

- 82 % consumers care about quality more than calories
  - 48% want protein-rich options (top)
- 56% don't think there are healthy options on menus

Mintel Healthy Dining Trends US March 2018

## MarketMaker

- <https://mi.foodmarketmaker.com/>

Connecting Producers, Markets, and Food Lovers

- Producer profiles
- Market research

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