Top Findings of the Power of Meat 2019

The 14th edition of The Power of Meat takes a step back from the tactical execution at the meat case to better understand how the industry can optimize meat and poultry’s role in today’s food culture: the way we eat, shop and live.

1. Shoppers increasingly buy meat/poultry across the store. Is it time to think from the meal occasion in instead of the department out? While typically managed as different departments by the industry, consumers increasingly shop across the full meat offering, from the meat case and counter, to the frozen aisle and deli. Across all departments, convenience-focused meat and poultry saw robust growth in 2018, including value-added (+5.1%), fully-cooked (+2.5%) and frozen (+2.2%).

2. One-quarter buy meat and poultry for one meal at a time. How do we inspire them to buy tomorrow’s meat as well? Four in 10 shoppers buy meat/poultry to last for the next several days, 35% buy more than they need to freeze and use over time, and 23%, particularly Gen Z and Younger Millennials, buy meat and poultry for one meal at a time. Those who buy in larger quantities to freeze over time, commonly repackage (87%) and re-portion (86%) their purchases before freezing.

3. Beyond making routine meals, shoppers use social media and recipe sites for meal inspiration. How can we turn inspiration into dollars? While 74% of Americans tend to draw from routine meals, 47% are inspired by recipe websites, 31% by cooking shows, 29% by Facebook, 26% by Pinterest and 24% by YouTube. Social and digital engagement is much higher among younger shoppers. Shoppers who take to social media are more likely to shop online, buy one meal at a time, buy meal kits, value-added meat and are highly sensitive to promotions.

4. Online grocery shopping is growing, but meat lags behind. How can brands and retailers create a seamless online/offline buying experience, win the first click and subsequent orders? Less than 1% of shoppers primarily buy groceries online, but 39% supplement store trips with online orders. Meat trails other areas: 21% have purchased any meat/poultry online and 14% have purchased fresh meat online. Online growth is likely, with 45% of current online shoppers expecting they will buy more in the coming year. For 81%, meat searches start with their past purchase history and 70% search for specific brands.

5. In-store promotional signage becomes the top platform for checking meat/poultry specials. How do we optimize signage effectiveness, while reaching beyond the store as well? Promotional research and purchase decision-making have been shifting from the home to the store. After a 13-year run as the top resource for checking meat/poultry promotions, the print ad (51%) is surpassed by in-store promotional signage (53%). Digital, social and mobile are growing promotional resources also. Meat/poultry sales promotions can be effective at driving stock-up, impulse and brand-switching.

6. Influenced by health & well-being and ethical living, food choices are increasingly influenced by want versus need. How do we leverage wants to grow sales? In addition to the traditional 4P marketing mix of Price, Product, Place and Promotion, consider four more: People, Protein, Planet and Production. Two-thirds of shoppers look for “better-for-me” options when buying meat and poultry, with a focus on leaner cuts, moderation and protein variety. Meat continues to lose out in the nation’s protein craze, with just 0.2% of sales coming from meat carrying protein claims. Three in 10 shoppers look for better-for... claims relative to the animal and planet, with an elevated interest in each among younger shoppers.

7. Plant-based meat alternatives are a small but fast-growing market; interest in blended plant/meat items is even higher. Can plant-based integration be used to actually draw younger shoppers to the meat department? Three-quarters of meat eaters integrate plant-based meat alternatives into their dinner lineup. This segment rings up $878 million in annual sales, up 19%, with sales driven by Gen Z and Millennials. Blended plant/meat items, such as mushroom burgers, have a higher and greater cross-population appeal, and can be a bridge to the attributes consumers look for, while keeping meat on the plate.

8. Meal kits are an important key to introducing shoppers to new cuts and kinds while overcoming trial barriers. How do we leverage meal kits and other consumer-focused solutions to grow shoppers’ culinary comfort zone? Four in 10 shoppers have purchased a meal kit in the past year, either at retail (34%) or through delivery (13%). The meat/poultry quality and quantity matters greatly in the decision to buy again and 71% agree meal kits prompt them to try new meat/poultry items.

9. The stove and oven still rule meat/poultry preparation, but the Instant Pot and air fryer are making rapid inroads. Can preparation methods inspire meal and meat merchandising and recipe innovation? Consumers average 4-5 meat/poultry preparation methods and mostly switch between the stove, oven, grill and crock pot. If owned, 74% of consumers use their instant pots occasionally or frequently to prepare meat/poultry and 59% use their air fryer to do so.

10. Across the store, meat/poultry carrying production claims grew sales an above-average 4.8%. Consumers tie back livestock raising practices to their own health. How do we strike the right balance, and how do we best communicate features and benefits? Consumers tie production practices, such as hormone/antibiotic-free and grass-fed, back to their own health, even more so than having benefits for the welfare of the animal. More than half of shoppers want to see their stores carry more grass-fed (54%), all natural (52%) and free-from antibiotics and hormones items (52%).

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