

Poultry - US - December 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The chicken segment dominates the poultry category and is essentially keeping it in the black with marginal growth while other poultries are declining. Increased consumption of other poultry types and finding new occasions and uses for chicken will be necessary. Flavor expansion, premium convenience products, farm fresh messaging and plant-based products are all opportunities for brands."

- Kaitlin Kamp, Food & Drink Analyst

This report looks at the following areas:

- Other poultry struggles to permeate chicken's dominance
- Poultry dependent on habitual behavior
- Poultry consumers stuck in the dinner occasion

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Poultry - US - December 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
Definition

Executive Summary

Key takeaways
The issues
Other poultry struggles to permeate chicken's dominance
Figure 1: Poultry type consumption, October 2019
Poultry dependent on habitual behavior
Figure 2: Poultry associations, October 2019
Poultry consumers stuck in the dinner occasion
Figure 3: Poultry usage, October 2019
The opportunities
Flavors a way forward for dark meat
Figure 4: Poultry behaviors by poultry cut consumption, net, October 2019
New usage can boost excitement and engagement
Figure 5: Poultry usage, October 2019
Jumping on the BFY bandwagon
Figure 6: Poultry attributes by protein type consumption, October 2019
What it means

The Market – What You Need to Know

Chicken keeps the category flush
Plants shake up the protein space
Ethics raise the bar for protein
Poultry gets political

Market Size and Forecast

Poultry sales remain stalled
Figure 7: Total US sales and fan chart forecast of poultry, at current prices, 2014-24
Figure 8: Total US sales and forecast of poultry, at current prices, 2014-24

Market Breakdown

Chicken continues to dominate, steady the category
Figure 9: Total US retail sales and forecast of poultry, by segment, at current prices, 2014-24
Figure 10: Sales of poultry, by segment, percentage change 2017-19

Market Perspective

Brands respond to consumer pursuit of protein

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Poultry - US - December 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Percentage of food products with high/added protein claims, 2014-18

Plant-based proteins everywhere

Figure 12: Dietary preferences, February 2019

Ethical standards crossing into the healthy debate

Market Factors

Poultry prices hold steady

Figure 13: Changes in consumer food price indexes, year over year and average year to date, August 2018-August 2019

China lifts four-year ban on US chicken imports

State legislation begins banning small cages

Key Players – What You Need to Know

Tyson peckish for sales growth

Happy, healthy birds make top-selling products

Poultry brands dig deeper into Elevated Convenience

Plant-based poultry expected to grow

Company and Brand Sales of Poultry

Tyson's losses pave the way for private label to lead

Figure 14: Multi-outlet sales of poultry, by leading companies, rolling 52 weeks 2018 and 2019

Perdue chicken brands move forward

Chicken

Figure 15: Multi-outlet sales of chicken, by leading companies and brands, rolling 52 weeks 2018 and 2019

Organic, farm fresh brands make gains for Hormel, Cargill and Maxwell

Other poultry segment

Figure 16: Multi-outlet sales of other poultry, by leading companies and brands, rolling 52 weeks 2018 and 2019

What's Working

Farm focus

Figure 17: Poultry brands with farm fresh messaging, MULO sales 52 weeks, September 2018-19

Figure 18: Shady Brook Farms video

Natural birds make healthy sales

Figure 19: Poultry brands with organic/natural positioning, MULO sales 52 weeks, September 2018-19

Figure 20: Poultry product claim growth, percentage change 2017-18

Cut for convenience

Figure 21: Poultry brands with convenience products, MULO sales 52 weeks, September 2018-19

Figure 22: Poultry products with convenience claims, percentage change 2017-18

What's Struggling

Tyson saddled with a trifecta of woes

Figure 23: Tyson poultry products, MULO sales 52 weeks, September 2018-19

Poultry struggles to stand out among prepared foods

Figure 24: Poultry brands with meal kits, MULO sales 52 weeks, September 2018-19

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Poultry - US - December 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Legacy plant-based brands stuck in the past

Figure 25: Legacy vegetarian poultry brands, MULO sales 52 weeks, September 2018-19

What to Watch

Poultry plus plants

Figure 26: Plant-based poultry products, MULO sales 52 weeks, September 2018-19

Figure 27: Perdue Chicken Plus video

"Slow growth" an attribute to watch

The Consumer – What You Need to Know

Health and freshness influence poultry consumption

Poultry's place at dinner leaves little time for other occasions

Consumers need a little excitement

Keep it clean, natural

Consumers expect a value

Consumption by Poultry Type

Chicken remains at the top of the pecking order

Figure 28: Poultry type consumption, October 2019

Parents consume a wider repertoire of poultry

Figure 29: Poultry type consumption, by parental status, October 2019

Poultry consumption varies by race and origin

Figure 30: Poultry type consumption, by race and Hispanic origin, October 2019

Poultry Consumption by Cut

Consumption of fresh white meat surpasses other cuts...

Figure 31: Poultry type consumption, net, October 2019

Figure 32: Poultry type consumption, October 2019

...but variety, or rather versatility, is the spice of life

Figure 33: Poultry type consumption, repertoire analysis, October 2019

Generational divide between fresh and frozen

Figure 34: Poultry cut consumption, by age, October 2019

Consumers age out of nuggets

Figure 35: Poultry cut consumption, net, by age, October 2019

Parents consume more types of cuts

Figure 36: Poultry cut consumption, repertoire analysis, by parental status, October 2019

Figure 37: Poultry cut consumption, by parental status, October 2019

Poultry Usage

Poultry continues to rise to the dinner occasion

Figure 38: Poultry usage, October 2019

Breakfast, snacking are the path to growth

Figure 39: Poultry usage, breakfast and lunch, October 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Poultry - US - December 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Women leverage poultry in recipes more

Figure 40: Poultry usage, by gender, use as an ingredient, October 2019

Younger consumers more likely to reach for poultry for lunch

Figure 41: Poultry usage, by age, lunch, October 2019

Poultry Attributes

Act natural

Animal ethics on the back burner, for now

Figure 42: Poultry attributes, October 2019

TURF analysis

Figure 43: TURF analysis – Poultry attributes, October 2019

Pricier poultry warrants more attributes

Figure 44: Poultry attributes by protein type consumption, October 2019

Don't forget Value Chasers

Figure 45: Poultry attributes, by food and drink segmentation, October 2019

Women, especially moms, more concerned with health

Figure 46: Poultry attributes, by parental status and gender, October 2019

Older consumers swayed by freshness, younger consumers by wellness

Figure 47: Poultry attributes, by age, October 2019

Poultry Attitudes

Consumers could use a flavor boost

Figure 48: Poultry behaviors, October 2019

Figure 49: Directionally fast-growing flavors in new US food product launches, July 2016-June 2019

Nuggets, dark meat have the most opportunity for flavor expansion

Figure 50: Poultry behaviors by poultry cut consumption, net, October 2019

Foodies ready for the next thing

Figure 51: Poultry behaviors, by food and drink segmentation, October 2019

Parents more interested in innovation

Figure 52: Poultry behaviors, by parental status, October 2019

Figure 53: Perdue Chicken PLUS video

Flavor interest is unsurprisingly cultural

Figure 54: Poultry behaviors, by race and Hispanic origin, October 2019

Poultry Associations

Poultry a part of the routine

Figure 55: Poultry associations, October 2019

Figure 56: Correspondence analysis – Symmetrical map – Poultry perceptions, October 2019

Value often sacrificed for convenience

Figure 57: Poultry associations, good value, October 2019

Dark meat loses in health, wins in flavor

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Poultry - US - December 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 58: Poultry associations, October 2019

Parents perceive nuggets more favorably

Figure 59: Poultry associations, nuggets/bites, by parental status, October 2019

Younger consumers need preparation guidance

Figure 60: Poultry associations, by age, easy to prepare, October 2019

Price Sensitivity Analysis

Consumers unwilling to sacrifice value

Figure 61: Price sensitivity – A 25 oz bag of frozen, unflavored chicken nuggets – Price summary table, October 2019

Figure 62: Price sensitivity – A 25 oz bag of frozen, unflavored chicken nuggets – Optimal price, October 2019

Figure 63: Price sensitivity – A 25 oz bag of frozen, unflavored chicken nuggets – Threshold prices, October 2019

Figure 64: Price sensitivity – A 25 oz bag of frozen, unflavored all natural chicken nuggets with no artificial ingredients or preservatives – Optimal price, October 2019

Figure 65: Price sensitivity – A 25 oz bag of frozen, unflavored all natural chicken nuggets with no artificial ingredients or preservatives – Threshold prices, October 2019

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Food and drink segmentation

Abbreviations and terms

Abbreviations

Appendix – The Market

Figure 66: Total US retail sales and forecast of poultry, at inflation-adjusted prices, 2014-24

Figure 67: Total US retail sales of poultry, by segment, at current prices, 2017 and 2019

Figure 68: Total US retail sales and forecast of chicken, at current prices, 2014-24

Figure 69: Total US retail sales and forecast of chicken, at inflation-adjusted prices, 2014-24

Figure 70: Total US retail sales and forecast of other poultry, at current prices, 2014-24

Figure 71: Total US retail sales and forecast of other poultry, at inflation-adjusted prices, 2014-24

Appendix – Retail Channels

Figure 72: Total US retail sales of poultry, by channel, at current prices, 2017 and 2019

Appendix – Key Players

Figure 73: Multi-outlet sales of poultry, by leading companies, rolling 52 weeks 2018 and 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com