

Poultry - US - November 2012

Scope and Themes



“Nearly half of respondents say they would like to see more recipes on poultry packaging, but such interests might be better served if healthy recipes were offered at point of sale. This entails brands cooperating with retailers.”

– John N. Frank, Category Manager, Food and Drink

In this report we answer the key questions:

- **Can chicken be positioned as even healthier?**
- **Will consumers flock to other poultry?**
- **How can brands encourage more poultry grilling?**

The U.S. market for poultry products experienced steady but moderate growth between 2007 and estimated 2012 and is expected to continue growing at this pace into 2017, driven by rising poultry consumption. Also factoring into sales growth are the obesity epidemic and consumers’ desire for nutritious foods that help them maintain healthy weight. In addition, ethnic consumers appear more likely than white consumers to eat poultry, and the population of Hispanic, black, and Asian consumers is set to grow more quickly than the population of white consumers, which should drive future growth. Furthermore, the slow economic recovery means that many consumers still operate on tight household budgets that make dining out cost prohibitive and preparing food at home more cost effective, which should also drive sales. This report provides in-depth examination of these issues, as well as close analysis of the following:

- How sales of other meat products such as beef, pork, and fish compete with poultry sales

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DID YOU KNOW?

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

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Scope and Themes

- How recent food safety issues have impacted consumer perceptions of poultry and how the market is addressing these concerns
- The commanding position of supermarkets for retail sales and how mass, drug, specialty, and natural foods channels are competing
- How the three leading companies in the market have maintained their positions and how industry consolidation impacts the market
- Leading poultry companies' brand marketing strategies, especially their online initiatives
- Innovations and product trends that are helping to drive sales.

Moreover, this report features analysis of Mintel's exclusive consumer survey as well as that of the Experian Simmons NCS, exploring consumer usage, purchase, and consumption; consumption frequency and reasons some consumers are eating less poultry in the last year; and attitudes and opinions about poultry and meat products. Mintel also provides compelling analysis of the impact of race/Hispanic origin on the market.

This report builds on the analysis presented in Mintel's *Poultry—U.S., December 2010*, as well as reports in 2008, 2007, 2006, and 2005. It focuses primarily on uncooked poultry, both fresh and frozen, sold through retail channels for consumption at home. For the purposes of this report, the following are defined as poultry:

- fresh and frozen chicken parts, including cuts like boneless, skinless breasts
- fresh and frozen whole chickens
- other poultry, fresh and frozen, which is mostly made up of turkey, but also includes duck and other specialty birds.

Sales data include UPC-coded products, as well as random weight (PLU) poultry sold at "butcher counters" or prepacked in frozen and refrigerated sections of grocery stores.

Frozen/refrigerated or shelf-stable prepared meals with poultry are excluded. Also excluded are restaurant or foodservice sales.

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