

Poultry - US - December 2018

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.



"Poultry maintained its position as the most widely consumed animal protein with nearly total household penetration. Category sales topped \$26.2 billion in 2018, a modest 2% gain from 2017. The universal appeal of poultry comes from its healthy reputation, versatility, and affordability."

– **Michael Averbook, Food & Drink Analyst**

This report looks at the following areas:

With consumer interest in protein at a high, poultry is not only poised for success but also charged with defending its position.

- **Is marginal growth a precursor of a category plateau?**

**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 2018

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

The issues

Is marginal growth a precursor of a category plateau?

Figure 1: Total US sales and fan chart forecast of poultry, at current prices, 2013-23

The opportunities

Help to break the mealtime monotony

Figure 2: Protein consumption frequency, September 2018

Red meat's woes and successes can be a model for poultry opportunity

Figure 3: Poultry behavior – Consumption versus last year, September 2018

iGens and Millennials and, yep, GenXers can power newer occasions

Figure 4: Protein occasions – Chicken and turkey, by for dinner, for lunch, for breakfast, and as a snack, September 2018

Hard "clean" claims outweigh ethical

Figure 5: Poultry claims, September 2018

What it means

The Market – What You Need to Know

Conservative gains, sizeable market

Poultry delivers on value

Healthy eating is on consumer radars

Poultry's value appeals even in an improved economy

Market Size and Forecast

Category continues marginal growth

Figure 6: Total US sales and fan chart forecast of poultry, at current prices, 2013-23

Figure 7: Total US retail sales and forecast of poultry, at current prices, 2013-23

Market Breakdown

Chickens rule of the roost continues

Figure 8: Total US retail sales and forecast of poultry, by segment, at current prices, 2013-23

Market Perspective

Health, versatility, and price make poultry the protein of choice

Figure 9: Protein perceptions – Healthy, good value, and convenient, September 2018

Figure 10: Changes in food price indices, 2017-18

Plant-based alternatives

From cells to poultry

**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 2018

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.

Online butchers a niche part of the poultry market

Market Factors

Most consumers strive to eat healthy

Figure 11: Approaches to healthy eating, May 2018

Affordable poultry holds its own despite improved economy

Figure 12: Consumer Sentiment Index

Away from home opportunities grow

Figure 13: Consumer expenditures for food, September 2017 and September 2018

Uncertainty in trade issues threaten market volatility

Consumers are waiting longer to have children

Figure 14: Households, by presence of own children, 2008-18

Key Players – What You Need to Know

Leading brands struggle, private labels gain traction

Top turkey companies post gains

Brands strive for minimally processed, clean positioning

Going international

Next level convenience in poultry innovation

Company and Brand Sales of Poultry

Tyson continues domination, but slips

Perdue refreshes packaging to offset struggles

Recalls, scandals plague JBS

Turkey brands take flight

Private label brightens the category

Figure 15: Multi-outlet sales of poultry, by leading companies, rolling 52 weeks 2017 and 2018

What's Working?

Private label gains brand share with value, innovation

Figure 16: Multi-outlet dollar and unit sales of poultry, by percent change of store brands, rolling 52 weeks 2017 and 2018

Figure 17: Attribute scores of poultry – Tasty, exciting, good value, by name brands and store brands, January 2017-November 2018

“Clean” labels and transparency gain trust

Figure 18: Launches of poultry, by hormone-free, all-natural product, and no additives/preservatives, 2017-18*

Figure 19: Multi-outlet sales of poultry, by select growing brands, rolling 52 weeks 2017 and 2018

Fresh birds

Figure 20: Poultry formats purchased – Any fresh poultry and any frozen poultry, September 2018

Figure 21: Purchase intent of poultry, by select fresh products, January 2017 – September 2018

Going global

Figure 22: Purchase intent of poultry, by select internationally inspired products, January 2017-November 2018

Plant-based nuggets, patties, and strips

Figure 23: Multi-outlet sales of poultry, by select meatless brands, rolling 52 weeks 2017 and 2018

**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 2018

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.

What's Struggling?

Category leaders lose share to store brands

Figure 24: Multi-outlet dollar and unit sales of poultry, by percent change of name brands, rolling 52 weeks 2017 and 2018

What's Next?

Snacking with the bird

Prepared meals and kits offer next-level convenience

The Consumer – What You Need to Know

Chicken leads the protein pecking order

A time and place for both fresh and frozen

Frequency may have peaked, interest has not

Turkey chipping away at seasonal ties

Mix of excitement and convenience sought after

Claims that signify “clean” top wish list

Poultry Species Purchased

Chicken, turkey far outpace other birds

Figure 25: Poultry types purchased, September 2018

Young adults reaching for turkey more

Figure 26: Poultry types purchased – Chicken and turkey, by age, September 2018

Men, fathers buy a broader repertoire of poultry types

Figure 27: Poultry types purchased, by parental status by gender, September 2018

Poultry Types Purchased

Fresh and frozen both have their place at the table

Figure 28: Poultry types purchased, September 2018

Participant repertoires are 50/50

Figure 29: Repertoire of poultry types purchased, September 2018

Larger households seek flexibility

Figure 30: Repertoire of poultry types purchased – Four or more types, by household size, September 2018

Poultry Consumption

More than half of consumers eat chicken a few times a week

Figure 31: Protein consumption frequency, September 2018

Younger men, fathers are most frequent poultry eaters

Figure 32: Protein consumption frequency – Chicken, turkey, and other poultry, by gender and age and parental status by gender, September 2018

Protein Perceptions

Leveraging versatility, convenience can nudge consumption

Figure 33: Correspondence Analysis – Symmetrical map – Protein perceptions, September 2018

Figure 34: Protein perceptions, September 2018

Younger consumers chipping away at turkey's seasonality

**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 2018

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 35: Protein perceptions – Turkey, by seasonal, September 2018

If you can, hitch your brand to the protein trend

Figure 36: Protein perceptions – Good source of protein, September 2018

Protein Occasions

Keep poultry from becoming mundane

Figure 37: Correspondence Analysis – Symmetrical map – Protein occasions, September 2018

Figure 38: Protein occasions, September 2018

Protein content and versatility make snacking a next step

Figure 39: Protein occasions – Chicken and turkey, by for dinner, for lunch, for breakfast, and as a snack, September 2018

Poultry Behavior

Red meat's decline is poultry's gain

Figure 40: Poultry behavior, September 2018

Women use variety of types, but men increasing consumption

Figure 41: Poultry behavior, by gender and age and parental status by gender, September 2018

Larger households dive deeper into category versatility

Figure 42: Poultry behavior – I used different types depending on the occasion, by household size, September 2018

Poultry Attitudes

Category participants still interested in exploration

Figure 43: Poultry attitudes, September 2018

Older consumers seek to diversify, younger adults experiment and develop skills

Figure 44: Poultry attitudes, by generation, September 2018

Parents looking for help managing family mealtime

Figure 45: Poultry attitudes – Parental status, September 2018

Poultry Claims

Consumers are a little confused by claims

Figure 46: Poultry claims, September 2018

Women seek clean ethics, men choose convenience

Figure 47: Poultry claims, by gender, September 2018

Clean, free-from are "ageless" claims

Figure 48: Poultry claims, by age, September 2018

Mix of free-from claims, convenience, and quality maximizes reach

Figure 49: TURF Analysis – Poultry claims, September 2018

Ethical, clean claims substantiate other poultry

Figure 50: Poultry purchase, by poultry claims, September 2018

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

**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 2018

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.

TURF Methodology

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 51: Total US retail sales and forecast of poultry, at inflation-adjusted prices, 2013-23

Figure 52: Total US retail sales and forecast of poultry, by segment, at current prices, 2013-23

Figure 53: Total US retail sales of poultry, by segment, at current prices, 2016 and 2018

Figure 54: Total US retail sales and forecast of chicken, at current prices, 2013-23

Figure 55: Total US retail sales and forecast of chicken, at inflation-adjusted prices, 2013-23

Figure 56: Total US retail sales and forecast of other poultry, at current prices, 2013-23

Figure 57: Total US retail sales and forecast of other poultry, at inflation-adjusted prices, 2013-23

Figure 58: Total US retail sales of poultry, by channel, at current prices, 2016 and 2018

Appendix – Key Players

Figure 59: Multi-outlet sales of chicken, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 60: Multi-outlet sales of other poultry, by leading companies and brands, rolling 52-weeks 2017 and 2018

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