

# Bacon and Lunchmeat - US - 2021

Report Price: £3695 | \$4995 | €4400

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

## This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and the bacon and lunch meat category
- Bacon and lunchmeat product features that drive purchase
- Attitudes toward bacon and lunch meat
- Impactful shifts in lunchtime habits

Despite brand efforts to detach from consumers' limited perception of suitable occasions, there is still a constituency of consumers (about half) who largely reserve consumption of bacon and lunch meat to breakfast and lunch occasions, respectively. Yet consumers are still hungry for new ideas, indicating that brands may need to get creative and refresh how and where they communicate with consumers to edge into new uses, especially to reach younger adults.

Despite considerable sales growth for the category in 2020-21, the number of consumers who disengaged from the category could be cause for alarm: nearly a fifth of all consumers, including more than a sixth of those aged 18-34. Much of this is due to the increased time spent at home and less demand for quick, easy and portable lunch. As cooking fatigue grows and at least part-time working from home becomes more of the norm, brands have the opportunity to shift strategy to reestablish their foothold to be grounded in convenience and versatility.

While price is important to product choice, brand also remains a driver in the category. As supply chain and inflationary challenges lead to rising prices, brands will have to double down on messaging that conveys other elements of value to remain competitive. Still, the category's overall value proposition should leave it well-positioned relative to other protein cuts that will also be subject to price increases. As price volatility occurs across most proteins, shifting "down" to more affordable packaged meats or trading up to premium brands may occur.



"In the pandemic's first year, with a significant number of consumers and school-aged children at home with few away-from-home food options, bacon and lunch meat saw dramatic increases in sales: 21% in 2020 and another 6% in 2021."

– Billy Roberts, Sr. Analyst –  
Food and Drink

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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**
- **This Report looks at the following areas**
- **Definition**
- **Economic and other assumptions**
- **COVID-19: US context**

### EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**  
 Figure 1: Total US sales and fan chart forecast of bacon and lunchmeat, at current prices, 2016–26  
 Figure 2: Total US sales and forecast of bacon and lunch meat, at current prices, 2016–26
- **Impact of COVID-19 on bacon and lunch meat**  
 Figure 3: Short-, medium- and long-term impact of COVID-19 on bacon and lunch meat, 2021
- **Challenges and opportunities**
- **A fifth of consumers abandon packaged bacon and lunch meat**  
 Figure 4: Bacon and lunch meat nonparticipation, by age, 2021
- **Bacon and lunchmeat have to contend with plant-based fever**
- **Harness the opportunity of new approaches to work**  
 Figure 5: Changes to lunch habits, 2021
- **Adults under 55 are open to new ideas for bacon, lunchmeat**  
 Figure 6: Bacon and lunch meat attitudes, by age, 2021

### THE MARKET – KEY TAKEAWAYS

- **Pandemic sales growth extends well into 2021**
- **Bacon sales lead the surge**
- **Volatile meat and poultry prices impact the market**

### MARKET SIZE AND FORECAST

- **Category sales growth lingers into 2021**  
 Figure 7: Total US sales and fan chart forecast of bacon and lunchmeat, at current prices, 2016–26  
 Figure 8: Total US sales and forecast of bacon and lunch meat, at current prices, 2016–26

### What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
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

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

## SEGMENT PERFORMANCE

- **Bacon growth sets the pace for 2020**  
Figure 9: Sales of bacon and lunchmeat, by segment, 2016-21
- **Other channels resume encroaching upon supermarket share**  
Figure 10: Total US retail sales of bacon and lunch meat, by channel, at current prices, 2016-21

## MARKET FACTORS

- **Rising protein prices**  
Figure 11: Changes in consumer food price indexes – Meats, poultry and fish, 2019-22
- **At-home food spending surge continues**  
Figure 12: Sales of food at home and away from home, 2012-21
- **Bacon and lunch meat poised to tap into plant-based fever**  
Figure 13: Plant-based protein consumption, by dietary preferences, 2021
- **California rule could have national impact**
- **Changing household landscape calls for new focus**  
Figure 14: Percentage of households with children, 2008-18
- **Convenience remains a need among WFH consumers**

## COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Other brands outpace leading brands' private label growth**
- **Brands further explore alternative occasions**
- **Encourage the role of lunch meat as a routine lunch solution**

## MARKET SHARE

- **Leading brands lose share to private labels and other brands**
- **Sales of bacon and lunchmeat by company**  
Figure 15: Multi-outlet sales of bacon and lunchmeat, by leading companies, rolling 52 weeks 2020 and 2021

## COMPETITIVE STRATEGIES

- **Brands take new aim at expanded occasions**  
Figure 16: Brands targeting occasion expansion, 2021
- **Brands lean into sustainability initiatives**  
Figure 17: Lunch meat messaging focused on freshness/animal welfare, 2021

## MARKET OPPORTUNITIES

- **Don't forget to remain competitive at lunch**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

Figure 18: Lunch, before, during and after the pandemic, 2021

- **Speak to parents' health/protein needs**

Figure 19: Healthier claims on bacon/lunch meat, by parental status, 2021

- **Raise the bar on the importance of brand**

Figure 20: Important bacon/lunch meat features, 2021

## THE CONSUMER – KEY TAKEAWAYS

- **Despite sales gains, category attrition rises**
- **Extended WFH is a game changer**
- **Price leads bacon and lunchmeat choice**
- **Shake up consumer routines with bacon and lunch meat**
- **Consumers eager to dine out again**

## TYPES OF BACON AND LUNCH MEAT CONSUMED

- **Bacon for the win in 2020-21**  
Figure 21: Consumption of bacon and lunch meat, 2021
- **Opportunities remain to increase usage**  
Figure 22: Repertoire analysis – Bacon and lunchmeat consumption, 2021
- **Limited big shifts in types of bacon or lunch meat consumed**  
Figure 23: Bacon and lunch meat consumption, 2021
- **Younger adults need some inspiration to raise lunchmeat engagement**  
Figure 24: Consumption of bacon and lunch meat, by generation, 2021
- **Target young adults with freshness, customization of deli meats**  
Figure 25: Deli counter lunch meat consumption, by generation, 2021

## BACON AND LUNCH MEAT CONSUMPTION FREQUENCY

- **Weekly+ consumption is the norm among nearly half of category participants**  
Figure 26: Frequency of consumption of bacon and lunch meat, 2021
- **Variety and versatility keep weekly users fresh**  
Figure 27: Weekly consumption of bacon and lunch meat, 2021

## IMPORTANT BACON/LUNCH MEAT FEATURES

- **Price (really) trumps the flock of claims in product choice**  
Figure 28: Important attributes of bacon/lunch meat, 2021
- **Parents seek details in hard claims**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

Figure 29: Important attributes of bacon/lunch meat, by parental status, 2021

## LUNCH MEAT ATTITUDES

- **Quality and health play a role in lunch meat choice**

Figure 30: Attitudes toward lunch meat, 2021

- **Under 45s seek versatility from brands**

Figure 31: Lunch meat usage attitudes, by age, 2021

## BACON ATTITUDES

- **Remind consumers that bacon is worth the work**

Figure 32: Bacon attitudes, by age, 2021

- **Guide consumers to new occasions**

Figure 33: Bacon and lunch meat attitudes, 2021

- **Adults under 55 are open to new ideas for bacon, lunchmeat**

Figure 34: Bacon and lunch meat attitudes, by age, 2021

## THE PANDEMIC IMPACT ON LUNCHTIME BEHAVIOR

- **Emphasize ease and value of at-home lunch post-pandemic**

Figure 35: Lunch behaviors, 2021

- **Maximize the at-home lunch occasion**

Figure 36: Lunches featuring meat, by age, 2021

## APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Sales data**
- **Forecast**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**

## APPENDIX – THE MARKET

Figure 37: Total US sales and forecast of bacon and lunchmeat, at current prices, 2016–26

Figure 38: Total US retail sales and forecast of bacon and lunch meat, at inflation-adjusted prices, 2016–26

Figure 39: Sales of bacon and lunchmeat, by segment, current year

Figure 40: Total US retail sales of bacon and lunch meat, by segment, at current prices, 2019 and 2021

Figure 41: Total US retail sales and forecast of refrigerated bacon, at current prices, 2016–26

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

## Bacon and Lunchmeat - US - 2021



Report Price: £3695 | \$4995 | €4400

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

Figure 42: Total US retail sales and forecast of refrigerated bacon, at inflation-adjusted prices, 2016-26

Figure 43: Total US retail sales and forecast of refrigerated lunch meat, at current prices, 2016-26

Figure 44: Total US retail sales and forecast of refrigerated lunch meat, at inflation-adjusted prices, 2016-26

Figure 45: Total US retail sales and forecast of shelf-stable lunch meat, at current prices, 2016-26

Figure 46: Total US retail sales and forecast of shelf-stable lunch meat, at inflation-adjusted prices, 2016-26

### APPENDIX – COMPANIES AND BRANDS

Figure 47: Multi-outlet sales of bacon and lunchmeat, by leading companies, rolling 52 weeks 2020 and 2021

Figure 48: Multi-outlet sales of refrigerated bacon, by leading companies and brands, rolling 52 weeks 2020 and 2021

Figure 49: Multi-outlet sales of refrigerated lunchmeat, by leading companies and brands, rolling 52 weeks 2020 and 2021

Figure 50: Multi-outlet sales of shelf-stable lunchmeat, by leading companies and brands, rolling 52 weeks 2020 and 2021

### APPENDIX – RETAIL CHANNELS

Figure 51: Total US retail sales of bacon and lunch meat, by channel, at current prices, 2016-21

Figure 52: Total US retail sales of bacon and lunch meat, by channel, at current prices, 2019 and 2021

Figure 53: US supermarket sales of bacon and lunch meat, at current prices, 2016-21

Figure 54: US sales of bacon and lunchmeat through other retail channels, at current prices, 2016-21

### APPENDIX – CONSUMER

Figure 55: Average household spending on bacon and lunch meat, 2016-21

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.