

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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



“The lunch meat category enjoys high household penetration rates but is now grappling with the challenge of decreasing personal usage due to consumer price and health concerns.”

– Sarah Day Levesque, Food Analyst

In this report we answer the key questions:

- How can companies increase usage in an already saturated market?
- How can companies overcome price increases and drive sales?
- How can lunch meat brands address consumer health concerns?

While the number of households that use lunch meat is high (96%), the average U.S. household uses less than three pounds of lunch meat per month and only makes about eight lunch meat purchases a year. The recession and subsequent slow recovery may have attracted more users to the category who are seeking ways to save money, thus elevating demand for homemade sandwiches, but higher meat prices have stymied any increase in overall usage. Beyond high prices, consumers also have been grappling with nutritional concerns about lunch meat and nearly three in 10 consumers are eating less lunch meat in February 2013 than the year prior. From 2007-12, these trends have provided push-back so that even as meat prices rose (pork prices rose 20.5% from 2007-12, according to the Economic Research Services [ERS] of the United States Department of Agriculture [USDA]), lunch meat sales only grew 8% to \$12.6 billion in 2012.

Opportunities for future growth may be defined by opportunities to create new usage occasions for lunch meat. New lunch meat formats and more convenient packaging, for example, may create opportunities for increased lunch meat use in snacking, entertaining, and cooking. New products that feature better-for-you and natural characteristics, as well as bold new flavors, may also appeal to new consumers and those put off by negative perceptions of traditional lunch meat. Mintel expects this innovation, coupled with ever-increasing meat prices, to drive sales up 15% from 2012-17 to reach \$14.2 billion.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
oxygen@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

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Table of Contents

Scope and Themes

What you need to know
Definition
Data sources
Sales data
Consumer survey data
Advertising creative
Abbreviations and terms
Abbreviations
Terms

Executive Summary

Lunch meat sales creep higher, fueled by inflation

Figure 1: Total U.S. sales and fan chart forecast of lunch meat market, at current prices, 2007-17

Lunch meat segment performance

Figure 2: Total retail sales of lunch meat, segmented by type, at current prices, 2010 and 2012

Health concerns and higher prices squelch demand

Figure 3: Reasons consumers might eat more lunch meat, by change in lunch meat eating habit in past 12 months, February 2013

Kraft Foods' Oscar Mayer leads market but loses sales along with others

Figure 4: MULO sales of refrigerated sliced lunch meat, by leading companies, 52 weeks ending March 24, 2013

Expanding the ways consumers use lunch meat may grow sales

Figure 5: Household usage by type of meat, June 2013

Nearly one in four consumers are eating less lunch meat this year

Figure 6: Lunch meat usage, February 2013

Consumers most interested in natural, nutritional attributes

Figure 7: Important lunch meat attributes, February 2013

What we think

Issues and Insights

How can companies increase usage in an already saturated market?

Insight: Redefine lunch meat for more varied usage

How can companies overcome price increases and drive sales?

Insight: Enhance consumers' perception of lunch meat value

How can lunch meat brands address consumer health concerns?

Insights: Create a better-for-you image

Trend Applications

Trend: Factory Fear

Market Size and 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 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Key points

Meat consumption down; availability, price, and health concerns to blame

Widespread health concerns encourage meat reduction

Economic recovery could stifle growth prospects

Sales and forecast of lunch meat market

Figure 8: Total U.S. retail sales and forecast of lunch meat, at current prices, 2007-17

Figure 9: Total U.S. retail sales and forecast of lunch meat, at inflation-adjusted prices, 2007-17

Fan chart forecast

Figure 10: Total U.S. sales and fan chart forecast of lunch meat market, at current prices, 2007-17

Market Drivers

Key points

Higher retail prices discourage lunch meat usage

Figure 11: Consumer Price Index for all urban consumers: Meats, poultry, fish, and eggs, March 2008-13

Negative health perceptions may discourage increased usage

Figure 12: Consumer attitudes on lunch meat, by age, February 2013

Figure 13: Reasons consumers might eat more lunch meat, by age, February 2013

Figure 14: Reasons consumers might eat more lunch meat, by household income, February 2013

"Brown bag it" trend motivates some to bring lunch from home

Competitive Context

Eating out presents a convenient alternative to homemade lunch

Meals, frozen and homemade, offer more food at competitive price

Figure 15: Lunch meat competition, February 2013

Snacking culture eats into lunch meat usage

Segment Performance

Key points

Prepackaged lunch meats show biggest growth during 2010-12

Sales of lunch meat, by segment

Figure 16: Total retail sales of lunch meat, segmented by type, at current prices, 2010 and 2012

Segment Performance—Deli Counter Lunch Meat

Key points

Deli counter lunch meat sales recover from dip in 2011

Sales and forecast of deli counter lunch meat

Figure 17: Total U.S. retail sales and forecast for deli counter lunch meat, at current prices, 2007-17

Segment Performance – Refrigerated Sliced Lunch Meat

Key points

Refrigerated sliced lunch meat sales driven by price increases

Improving economy may have negative effect, innovation needed

Sales and forecast of refrigerated sliced lunch meat

**BUY THIS
REPORT NOW**

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

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 18: Total U.S. retail sales and forecast for refrigerated sliced lunch meat, at current prices, 2007-17

Segment Performance – Refrigerated Unsliced Lunch Meat

Key points

Refrigerated unsliced lunch meat floundering

Sales and forecast of refrigerated unsliced lunch meat

Figure 19: Total U.S. retail sales and forecast for refrigerated unsliced lunch meat, at current prices, 2007-17

Retail Channels

Key points

Supermarkets dominate sales but small drug store channel growing

Sales of lunch meat, by channel

Figure 20: Sales of lunch meat, by channel, 2010 and 2012

Retail Channels – Supermarkets

Key points

Supermarket sales struggle for volume sales growth

Supermarket sales of lunch meat

Figure 21: Supermarket sales of lunch meat, at current prices, 2007-12

Retail Channels – Drug Stores

Key points

Drug stores' share of lunch meat market tiny but growing

Drug store sales of lunch meat

Figure 22: Drug store sales of lunch meat, at current prices, 2007-12

Retail Channels – Other Channels

Key points

Value sales growth sluggish in other channels

Figure 23: Other channels sales of lunch meat, at current prices, 2007-12

Retail Channels – Natural Supermarkets

Key points

Insights

Sales of lunch meats in the natural channel

Figure 24: Natural supermarket sales of lunch meats, at current prices, 2010-12*

Figure 25: Natural supermarket sales of lunch meats, at inflation-adjusted prices, 2010-12*

Natural channel sales of lunch meats by segment

Figure 26: Natural supermarket sales of lunch meats, by segment, 2010 and 2012*

Natural channel sales of lunch meats by organic

Figure 27: Natural supermarket sales of lunch meats, by organic, 2010 and 2012*

Leading Companies and Brands

Key points

BUY THIS
REPORT NOW

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

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Two of top three companies lose sales in 2012 to 2013

Private label remains relevant but not gaining market share

Figure 28: Lunch meat launches, by private label, 2008-13*

Manufacturer sales of refrigerated lunch meat

Figure 29: MULO sales of refrigerated lunch meat, by leading companies, rolling 52 weeks 2012 and 2013

Manufacturer sales of refrigerated sliced lunch meat

Figure 30: MULO sales of refrigerated sliced lunch meat, by leading companies, rolling 52 weeks 2012 and 2013

Manufacturer sales of refrigerated unsliced lunch meat

Figure 31: MULO sales of refrigerated non-sliced lunch meat, by leading companies, rolling 52 weeks 2012 and 2013

Innovations and Innovators

Lunch meat innovation down from five-year high in 2011

Figure 32: New lunch meat product introductions, 2008-13*

Bold flavors may ignite sales

New product claims targeting a variety of consumer needs

Figure 33: New lunch meat product claims, according to number of launches, 2008-13*

Marketing Strategies

Overview of brand landscape

Brand analysis: Oscar Mayer (Kraft Foods)

Figure 34: Brand analysis of Oscar Mayer, 2013

Online initiatives

Figure 35: Oscar Mayer Facebook Cover Photo, 2013

Figure 36: Oscar Mayer YouTube Channel, 2013

TV presence

Figure 37: Oscar Mayer TV ad, "Transparency," 2013

Figure 38: Oscar Mayer TV ad, "Secret Recipe," 2013

Print and other

Figure 39: Oscar Mayer Print Ad, 2012

Brand analysis: Boar's Head

Figure 40: Brand analysis of Boar's Head, 2013

Online initiatives

Figure 41: Boar's Head Facebook Post, 2013

TV presence

Figure 42: Boar's Head TV ad, "International Flavor," 2012

Print and other

Figure 43: Boar's Head Ad, 2012

Brand analysis: Hillshire Farm (Hillshire Brands Co.—formerly Sara Lee Corp.)

Figure 44: Brand analysis of Hillshire Farm, 2013

Online initiatives

Figure 45: Hillshire Farm Facebook Post, 2013

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

TV presence

Figure 46: Hillshire Farm TV ad, "Timing Is Everything," 2013

Figure 47: Hillshire Farm Facebook Post, 2012

Brand analysis: Land O'Frost

Figure 48: Brand analysis of Land O'Frost, 2013

Online initiatives

Figure 49: Land O'Moms Website, 2013

TV presence

Figure 50: Land O'Frost TV ad, "Wrapped Convenience," 2011

Print and other

Figure 51: Land O'Frost Website, 2013

Social Media – Lunch Meat

Key points

Key social media metrics

Figure 52: Key performance indicators, May 2013

Market overview

Brand usage and awareness

Figure 53: Usage and awareness of selected lunch meat brands, February 2013

Interaction with lunch meat brands

Figure 54: Interaction with selected lunch meat brands, February 2013

Online conversations

Figure 55: Online conversations on selected lunch meat brands, Feb. 23-May 22, 2013

Figure 56: Online conversations on selected lunch meat brands, by day, Feb. 23-May 22, 2013

Where are people talking about lunch meat brands?

Figure 57: Online conversations on selected lunch meat brands, by page type, Feb. 23-May 22, 2013

What are people talking about?

Lunch Meat Usage by Type of Meat

Key points

High penetration means growth relies on increasing frequency of usage

Figure 58: Household usage by type of meat, February 2013

Potential to encourage more varied usage of lunch meat

Figure 59: Usage of lunch meat/deli meat in household, by age, February 2013

Correspondence Analysis

Methodology

Recipe sharing, new product innovation may attract more diverse use

Figure 60: Correspondence analysis, June 2013

Figure 61: Household usage by type of meat, June 2013

Change in Lunch Meat Usage

BUY THIS
REPORT NOW

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

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Key points

Almost a quarter of consumers using less lunch meat in 2013

Figure 62: Changes in lunch meat usage, February 2013

Family households increase their usage of lunch meats

Figure 63: Lunch meat usage—Eating more, by presence of children in household, February 2013

Low-income households are more inclined to have cut back

Figure 64: Lunch meat usage—Eating less, by household income, February 2013

Figure 65: Consumer lunch meat purchase behavior, by household income, February 2013

Health concerns discourage usage

Figure 66: Reasons consumers might eat more lunch meat, by any lunch meat, February 2013

Lunch meat is losing appeal to its older audience

Figure 67: Lunch meat usage—Eating less, by age, February 2013

Important Lunch Meat Attributes

Key points

Nutritional attributes and transparency top consumers' priorities

Figure 68: Important lunch meat attributes, February 2013

Consumers eating less lunch meat prioritize nutritional attributes

Figure 69: Important lunch meat attributes, by change in lunch meat eating habits, February 2013

Consumer Lunch Meat Purchase Behavior

Key points

Value for money is a key purchase trigger for men

Figure 70: Consumer lunch meat purchase behavior, by gender, February 2013

Women more concerned with nutrition, low processing

Figure 71: Reasons consumers might eat more lunch meat, by gender, February 2013

Older consumers engage more with deli counter meat

Figure 72: Consumer lunch meat purchase behavior, by age, February 2013

Younger consumers less likely to trust private label

Positioning Opportunities for Lunch Meat

Key points

Position lunch meat as valuable protein source for older consumers

Figure 73: Consumer attitudes toward lunch meat, by age, February 2013

Snacking is popular among those eating more lunch meat

Larger households use lunch meat for entertaining

Figure 74: Consumer attitudes toward lunch meat, by household size, February 2013

Impact of Race and Hispanic Origin

Key points

Poor nutritional perceptions, cost concerns dissuade Asian consumers

Figure 75: Any usage, by race, February 2013

BUY THIS
REPORT NOW

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

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 76: Reasons consumers might eat more lunch meat, by race, February 2013

High prices prove offputting to Asian or Pacific Islander consumers

Figure 77: Consumer lunch meat purchase behavior, by race, February 2013

Black consumers less concerned about most product attributes

Figure 78: Important lunch meat attributes, by race, February 2013

Yet, snacking and child-friendly concepts should appeal

Figure 79: Consumer attitudes toward lunch meat, by race and presence of children, February 2013

IRI/Builders – Key Household Purchase Measures

Overview of luncheon meats

Refrigerated sliced lunchmeat

Consumer insights on key purchase measures – refrigerated sliced lunchmeat

Brand map

Figure 80: Brand map, selected brands of refrigerated sliced lunchmeat, by household penetration, 2012*

Brand leader characteristics

Key purchase measures

Figure 81: Key purchase measures for the top brands of refrigerated sliced lunchmeat, by household penetration, 2012*

Refrigerated non-sliced lunchmeat

Consumer insights on key purchase measures – refrigerated non-sliced lunchmeat

Brand map

Figure 82: Brand map, selected brands of refrigerated non-sliced lunchmeat buying rate, by household penetration, 2012*

Brand leader characteristics

Key purchase measures

Figure 83: Key purchase measures for the top brands of refrigerated non-sliced lunchmeat, by household penetration, 2012*

Appendix – Food and Drink Market Drivers

Consumer confidence

Figure 84: University of Michigan's index of consumer sentiment (ICS), 2007-13

Unemployment

Figure 85: U.S. Unemployment Rate, by month, 2002-13

Figure 86: U.S. Unemployment and underemployment rates, 2007-13

Figure 87: Number of employed civilians in U.S., in thousands, 2007-13

Food cost pressures

Figure 88: Changes in USDA Food Price Indexes, 2011 through April 25, 2013

Obesity

Figure 89: U.S. Obesity, by age group, 2008 and 2012

Childhood and teen obesity—highest in decades

Figure 90: Prevalence of obesity among children and adolescents aged 2-19, 1971-2010

Racial, ethnic population growth

Figure 91: Population, by race and Hispanic origin, 2008, 2013, and 2018

Figure 92: Households with children, by race and Hispanic origin of householder, 2012

BUY THIS
REPORT NOW

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

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Shifting U.S. demographics

Figure 93: Population, by age, 2008-18

Figure 94: Households, by presence of own children, 2002-12

Appendix – Other Useful Consumer Tables

Figure 95: Change in lunch meat usage—More, by age, February 2013

Figure 96: Change in lunch meat usage—More, by household income, February 2013

Figure 97: Change in lunch meat usage—More, by race, February 2013

Figure 98: Change in lunch meat usage—Less, by race, February 2013

Figure 99: Change in lunch meat usage—Less, by presence of children in household, February 2013

Figure 100: Change in lunch meat usage—Less, by employment, February 2013

Figure 101: Important lunch meat attributes, by age, February 2013

Figure 102: Important lunch meat attributes, by household income, February 2013

Figure 103: Household usage—Ham, by age, February 2013

Figure 104: Household usage—Ham, by race, February 2013

Figure 105: Household usage—Ham, by presence of children in household, February 2013

Figure 106: Household usage—Turkey, by age, February 2013

Figure 107: Household usage—Turkey, by household income, February 2013

Figure 108: Household usage—Turkey, by race, February 2013

Figure 109: Household usage—Beef, by gender, February 2013

Figure 110: Household usage—Beef, by age, February 2013

Figure 111: Household usage—Beef, by household income, February 2013

Figure 112: Household usage—Beef, by race, February 2013

Figure 113: Household usage—Salami, by age, February 2013

Figure 114: Household usage—Salami, by household income, February 2013

Figure 115: Household usage—Salami, by race, February 2013

Figure 116: Household usage—Pastrami, by gender, February 2013

Figure 117: Household usage—Pastrami, by age, February 2013

Figure 118: Household usage—Pastrami, by race, February 2013

Figure 119: Household usage—Bologna, Wursts, and Loaves, by gender, February 2013

Figure 120: Household usage—Bologna, Wursts, and Loaves, by age, February 2013

Figure 121: Household usage—Bologna, Wursts, and Loaves, by household income, February 2013

Figure 122: Household usage—Bologna, Wursts, and Loaves, by race and age, February 2013

Figure 123: Household usage—Chicken, by gender, February 2013

Figure 124: Household usage—Chicken, by age, February 2013

Figure 125: Household usage—Chicken, by race and age, February 2013

Figure 126: Household usage—Corned beef, by gender, February 2013

Figure 127: Household usage—Corned beef, by age, February 2013

Figure 128: Household usage—Corned beef, by race, February 2013

Figure 129: Any type, by age, February 2013

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

- Figure 130: Any type, by household income, February 2013
- Figure 131: Any type, by presence of children in household, February 2013
- Figure 132: Any usage, by gender, February 2013
- Figure 133: Any usage, by gender and age, February 2013
- Figure 134: Any usage, by household income, February 2013
- Figure 135: Any usage, by race, February 2013
- Figure 136: Any usage, by presence of children in household, February 2013
- Figure 137: Reasons consumers might eat more lunch meat, February 2013
- Figure 138: Reasons consumers might eat more lunch meat, by gender, February 2013
- Figure 139: Reasons consumers might eat more lunch meat, by age, February 2013
- Figure 140: Reasons consumers might eat more lunch meat, by household income, February 2013
- Figure 141: Lunch meat competition, by gender, February 2013
- Figure 142: Lunch meat competition, by gender and age, February 2013
- Figure 143: Lunch meat competition, by household income, February 2013
- Figure 144: Lunch meat competition, by race, February 2013
- Figure 145: Consumer lunch meat purchase behavior, by race, February 2013
- Figure 146: Consumer lunch meat purchase behavior, by presence of children in household, February 2013
- Figure 147: Consumer attitudes toward lunch meat, by gender, February 2013
- Figure 148: Consumer attitudes toward lunch meat, by household income, February 2013
- Figure 149: Consumer attitudes toward lunch meat, February 2013
- Figure 150: Consumer attitudes toward lunch meat, by age, February 2013
- Figure 151: Consumer attitudes toward lunch meat, by household income, February 2013
- Figure 152: Consumer attitudes toward lunch meat, by race, February 2013
- Figure 153: Consumer attitudes toward lunch meat, by any lunch meat, February 2013

Appendix: Social Media – Lunch Meat

Brand usage and awareness

- Figure 154: Oscar Mayer usage or awareness, by demographics, February 2013
- Figure 155: Hillshire Farm usage or awareness, by demographics, February 2013
- Figure 156: Land O’Frost usage or awareness, by demographics, February 2013
- Figure 157: Hebrew National usage or awareness, by demographics, February 2013

Interaction with lunch meat brands

- Figure 158: Activities done, February 2013
- Figure 159: Oscar Mayer—Activities done, by demographics, February 2013
- Figure 160: Oscar Mayer—Activities done, by demographics, February 2013
- Figure 161: Hillshire Farm—Activities done, by demographics, February 2013
- Figure 162: Hillshire Farm—Activities done, by demographics, February 2013
- Figure 163: Land O’Frost—Activities done, by demographics, February 2013
- Figure 164: Land O’Frost—Activities done, by demographics, February 2013
- Figure 165: Hebrew National—Activities done, by demographics, February 2013

BUY THIS
REPORT NOW

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

Lunch Meat - US - June 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 166: Hebrew National—Activities done, by demographics, February 2013

Online conversations

Figure 167: Online conversations on selected lunch meat brands, Feb. 23-May 22, 2013

Figure 168: Online conversations on selected lunch meat brands, by day, Feb. 23-May 22, 2013

Figure 169: Online conversations on selected lunch meat brands, by page type, Feb. 23-May 22, 2013

Figure 170: Types of conversations around selected lunch meat brands, Feb. 23 14-May 22

Figure 171: Types of conversations around selected lunch meat brands, by day, Feb. 23-May 22, 2013

Figure 172: Types of conversations around selected lunch meat brands, by page type, Feb. 23-May 22, 2013

Appendix – SymphonyIRI Builders Panel Data Definitions

SymphonyIRI Consumer Network Metrics

Appendix – Trade Associations

BUY THIS
REPORT NOW

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