



Freedonia Focus Reports
US Collection

Meat & Poultry Retail: United States

July 2021



CLICK TO ORDER
FULL REPORT **BROCHURE** CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Overview	4
Market Size	4
60% of Total Sales From Fresh Case Meat & Poultry	7
Consumer Insights	8
Meat & Poultry Consumption Spikes in 2020	8
Fresh Overwhelmingly Preferred Over Frozen	8
Bacon & Sausage Get Pandemic Boost in 2020	9
Key Opportunities	10
Cultivated Meat	10
Other Alternatives	10
Blends	10
More Value-Added Meat & Poultry Products	11
Better For: People & Animals	12
Competitive & Complementary Meat & Poultry Alternatives	13
Nearly One-Fourth of Consumers Eat Plant-Based Meat, Poultry, or Seafood	13
Plant-Based Beef Products Are the Most Commonly Consumed	13
Vegans & Vegetarians Are Most Likely to Eat Plant-Based Meat Products, While	
There is Much Overlap With Eating Both Plant-Based Meat & Dairy Products	14
Flexitarians & Omnivores Make Up the Largest Groups of Consumers Who Eat Plant-	
Based Meat or Dairy Products	14
Consumer Psychographics & Motivations for Eating Meat Alternatives	14
Key Opportunities in Plant-Based Alternatives	15
3. About This Report	17
Scope	17
Sources	18
Industry Codes	19
Resources	20

List of Tables & Figures

Figure 1 Key Trends in US Meat & Poultry Retail Sales, 2020 – 2025	3
Figure 2 US Meat & Poultry Retail Sales by Category, 2015 – 2025 (US\$ bil)	4
Table 1 US Meat & Poultry Retail Sales by Category, 2016 – 2025 (US\$ mil)	4
Table 2 US Meat & Poultry Retail Sales, 2015 – 2025	5
Figure 3 US Meat & Poultry Retail Sales by Category, 2016 – 2025 (% of value)	6
Table 3 US Consumption Rates for Meat & Poultry, 2010 – 2020 (% of hshlds)	8
Table 4 US Consumption Rates for Fresh vs. Frozen Meat & Poultry, 2010 – 2020 (% of hshlds)	8
Table 5 US Consumption Rates for Selected Processed Meats & Poultry, 2010 – 2020 (% of hshlds)	9
Table 6 NAICS & SIC Codes Related to Meat & Poultry Retail	19

About This Report

Scope

This report forecasts US meat and poultry retail sales in volume and value terms in nominal US dollars for 2021-2025.

Total retail sales by value are segmented by product in terms of:

- fresh case meat
- refrigerated meat
- breakfast meats
- luncheon meats
- frozen meat
- fresh case poultry
- frozen and refrigerated poultry

To illustrate historical trends, total meat and poultry retail sales in volume and value terms are provided for 2015-2020; the various segments by value are provided for 2016, 2019, and 2020.

This report focuses on the market for meat and poultry packaged food products sold to consumers in the US through retail channels. All retail distribution channels are covered, including supermarkets and grocery stores, mass merchandisers and supercenters, warehouse clubs, specialty food stores, health/natural food stores, convenience stores, drugstores, dollar stores, and direct sales channels such as online and mail order.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

A full outline of report items by page is available in the Table of Contents.

Sources

Meat & Poultry Retail: United States (FF10047) is based on *Food Market Outlook 2021: Grocery Shopping, Home Cooking, & Food Preferences in the Waning Pandemic Period*, a comprehensive industry study published by Packaged Facts. The information in that report was obtained from both primary and secondary research. Primary research included consultation with industry sources and visits to retail stores. Secondary research entailed gathering data from relevant trade, business, and government sources, as well as company promotional literature and annual reports. Estimates of market size and company performance were based on various sources, including reported revenues of product manufacturers and retailers, relevant publications, and other market research sources. The analysis in this report also drew, as a background source, on retail sales tracking data as available from IRI and Nielsen (for mass-market channels), and SPINS (for the natural channel).

Consumer analysis largely drew on three primary sources of data:

- Packaged Facts National Online Consumer Surveys include a panel of 2,046 US adults (age 18 and older) that is balanced to the national population on primary demographic measures such as age group, gender, geographic region, marital status, race/ethnicity, presence or absence of children in the household, and household income.
- The Fall 2020 MRI National Study and other survey years going back to 2010 are booklet-based surveys conducted across tens of thousands of respondents selected by address-based sampling to represent a statistically accurate cross-section of the US adult population (age 18+).
- The International Food Information Council Foundation's 2020 and 2019 Food & Health Surveys provide valuable insight into consumers' perspectives on food purchasing decisions, diet and lifestyle choices, and health benefits of foods, along with insights on other pertinent topics.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 6 | NAICS & SIC Codes Related to Meat & Poultry Retail

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
311412	Frozen Specialty Food Mfg	2013	Sausages and Other Prepared Meat Products
311612	Meat Processed From Carcasses	2015	Poultry Slaughtering and Processing
311615	Poultry Processing	2038	Frozen Specialties, NEC
311991	Perishable Prepared Food Mfg	2099	Food Preparations, NEC
424420	Packaged Frozen Food Merchant Wholesalers	5142	Packaged Frozen Foods
424470	Meat and Meat Product Merchant Wholesalers	5144	Poultry and Poultry Products
445110	Supermarkets and Other Grocery (except Convenience) Stores	5147	Meats and Meat Products
445210	Meat Markets	5411	Grocery Stores

Source: US Census Bureau

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

Packaged Facts

Consumer and Corporate Food Gifting in the U.S.

Food Carryout & Delivery

Food Carryout and Delivery: Special COVID-19 Consumer Insights

*Food Market Outlook 2021: Grocery Shopping, Home Cooking, & Food Preferences
in the Waning Pandemic Period*

Meal Kits: Trends and Opportunities in the U.S.

Online Grocery Shopping in the U.S.

Vegan, Vegetarian, and Flexitarian Consumers

The Freedonia Group

Freedonia Industry Studies

Commercial Refrigeration Equipment

Converted Flexible Packaging

Corrugated & Paperboard Boxes

Food & Beverage Packaging Innovation

Food Safety Products in the US

Foodservice Single-Use Products

Frozen Food Packaging

Global Caps & Closures

Global E-Commerce

Global Food Processing Machinery

Global Foodservice

Global Foodservice Single-Use Products

Global Single-Use Plastic Packaging Regulations

Meat, Poultry, & Seafood Packaging

Plastic Film

Protective Packaging

Freedonia Focus Reports

COVID-19 Market Impact Analysis

Dairy & Substitute Products: United States

Demographics: United States

Dough, Dry Pasta, & Tortillas: United States

E-Commerce: United States

Food Processing: United States

Frozen Foods: United States

Global Food E-Commerce
Meat Packaging: United States
Meat & Poultry Products: United States
Packaging Machinery: United States
Packaging: United States
Plant & Cultured Cell-Based Meat Alternatives: United States
Poultry Packaging: United States
Restaurants & Foodservice: United States

Freedonia Custom Research

Trade Publications

Beef
Convenience Store News
Food Business News
FoodNavigator-USA
Grocery Dive
Meat+Poultry
The National Provisioner
Prepared Foods
Progressive Grocer
Refrigerated & Frozen Foods
Supermarket News

Agencies & Associations

American Frozen Food Institute
Cattlemen's Beef Board
National Cattlemen's Beef Association
National Chicken Council
National Protein and Food Distributors Association
FMI – The Food Industry Association
National Frozen & Refrigerated Foods Association
North American Meat Institute
United States Census Bureau
United States Department of Agriculture
United States Food and Drug Administration