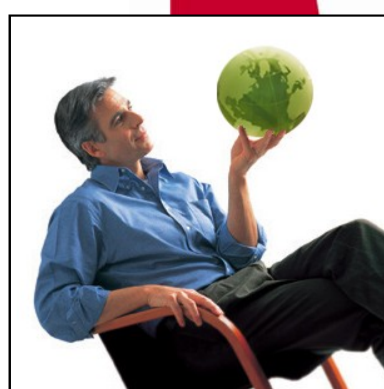
Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

International Markets Bureau

MARKET INDICATOR REPORT | MARCH 2012

Processed Meats in the United States



Growing Forward

Canada

CONSUMER MARKET

According to Global Trade Atlas, the United States (U.S.) imported over US$2.9 billion worth of beef and veal products from the world in 2010, almost US$1 billion of which was imported from Canada. The U.S also imported almost US$1.3 billion worth of pork and pork products from the world in 2010, US$905 million of which was imported from Canada. According to Statistics Canada, C$201 million worth of chicken and turkey products were exported from Canada to the United States in 2010.

Despite declining consumption rates of beef and veal in the U.S., these meats remain large exports for Canada. Consumption of pork and pork products has declined slightly since 2005, but Canadian exports to the U.S. have increased from 2008 to 2010. Per capita consumption of poultry products in the U.S. also declined from 2005 to 2010, while exports from Canada to the U.S. have only marginally fluctuated between 2008 and 2010.

Consumers are rethinking their consumption of processed meat products due to health and wellness trends and the high price of beef. Manufacturers are introducing chilled and frozen products with less sodium and fewer artificial ingredients. Pork sausages, beef sausages and bacon are some of the most popular chilled processed meats in the U.S. However, manufacturers are introducing chicken and turkey varieties as “healthier” alternatives.

Flavouring trends have also evolved, as new sausage varieties contain flavours such as sun-dried tomato, basil and apple. Claims such as “convenient,” “all-natural,” and even “gluten-free” are very popular amongst new product introductions. Private label trends are also becoming more prominent among processed meat products. Private label products with premium claims, unique flavourings or product attributes can be found as consumers look for affordable ready-to-cook products, resembling entrées that they would typically order at a restaurant.

INSIDE THIS ISSUE

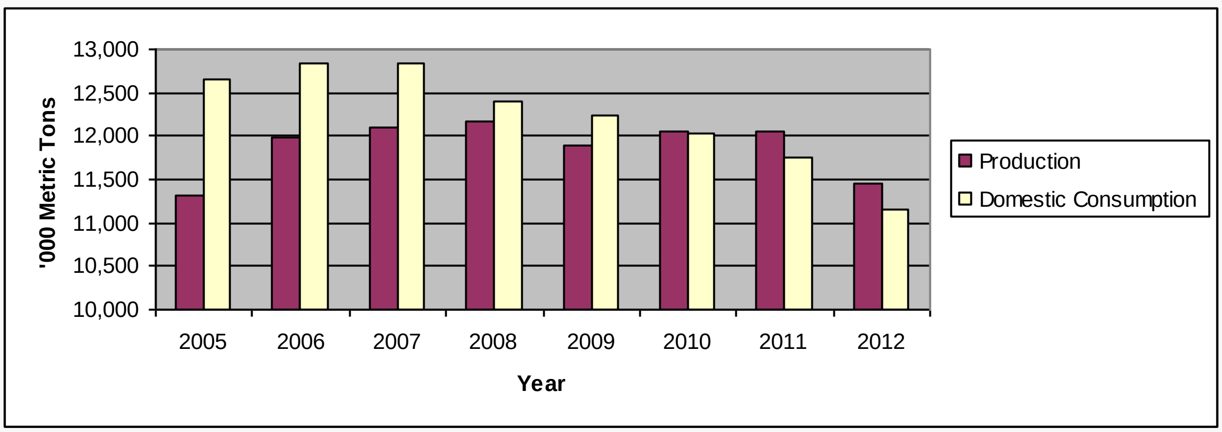
PRODUCTION AND CONSUMPTION

- In 2005, domestic consumption of beef and veal in the U.S. was well above domestic production levels. However, by 2011, total consumption and per capita consumption of beef and veal had dropped significantly causing an oversupply. Exports of beef and veal products from Canada to the U.S also dropped by C$557 million from 2005 to 2010. However, beef and veal exports to the U.S. remain as a combined C$1 billion market for Canada, and had reached over C$612.2 million in value by August 2011.

- Domestic pork production in the U.S. has slowly increased from 2005 to 2011, and is expected to increase further into 2012. Consumption of pork has remained relatively steady since 2005, but is expected to fall slightly below 2005 levels in 2012. Per capita consumption declined from 29.2kg in 2005 to 27.9kg in 2010.

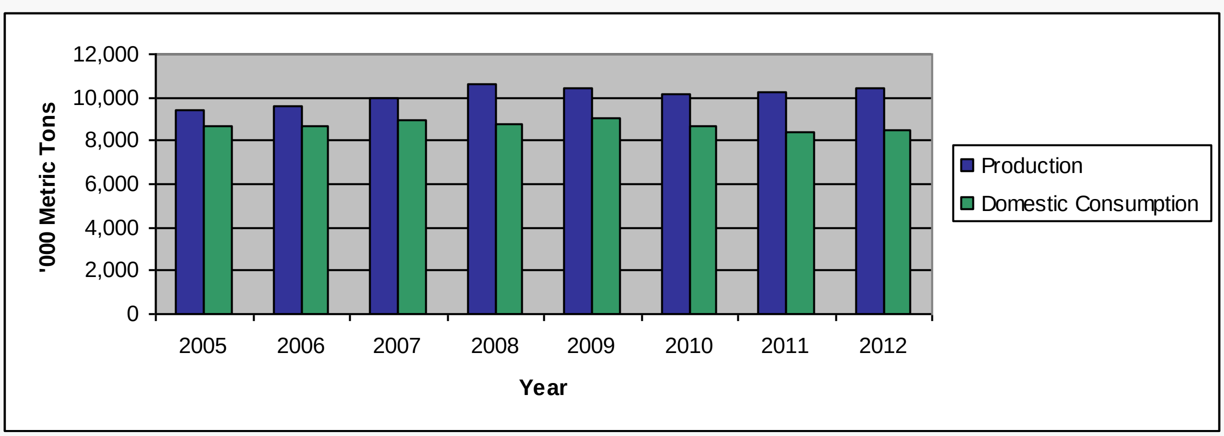
- Production of poultry meat in the U.S. grew from 15.9 million metric tons in 2005, to 16.6 million by 2010. Over the same time period, consumption also increased from 13.4 million metric tons to 13.5 million. However, per capita consumption of poultry meat declined from 45.4kg in 2005 to 43.4kg in 2010.

Production and Domestic Consumption of Beef and Veal in the United States in ’000 Metric Tons (Carcass Weight Equivalent)



Source: *USDA-FAS, 2011.* ***Note****: ‘Beef and veal’ does not include offal.*

Production and Domestic Consumption of Pork in the United States in ’000 Metric Tons (Carcass Weight Equivalent)



Source: *USDA-FAS, 2011.* ***Note****: Pork meat does not include offal, sausages or fats.*

▶ CONSUMPTION DEMOGRAPHICS

- According to the NPD Group's National Eating Trends database (2011)[1], the consumption of processed meats has seen a slight increase over the past ten years. On average, Americans consume processed meats 50.7 times per year. Of those who eat processed meats, 64.1% will consume these products an average of three times in a two-week period. Children between 6-12 years of age have the highest consumption rates, followed by adult males aged 65 years and older.

Core Consumer Markets
(at least 20% above average consumption rate)

- Low- to middle-income singles and empty nesters
- Single parents and married active seniors
- Large households and households with children
- Older homemakers
- Not employed or retired consumers
- Consumers with a high school education or lower
- Black ethnic groups
- Residents of the Southern states[2]

Underdeveloped Markets
(at least 20% below average consumption rate)

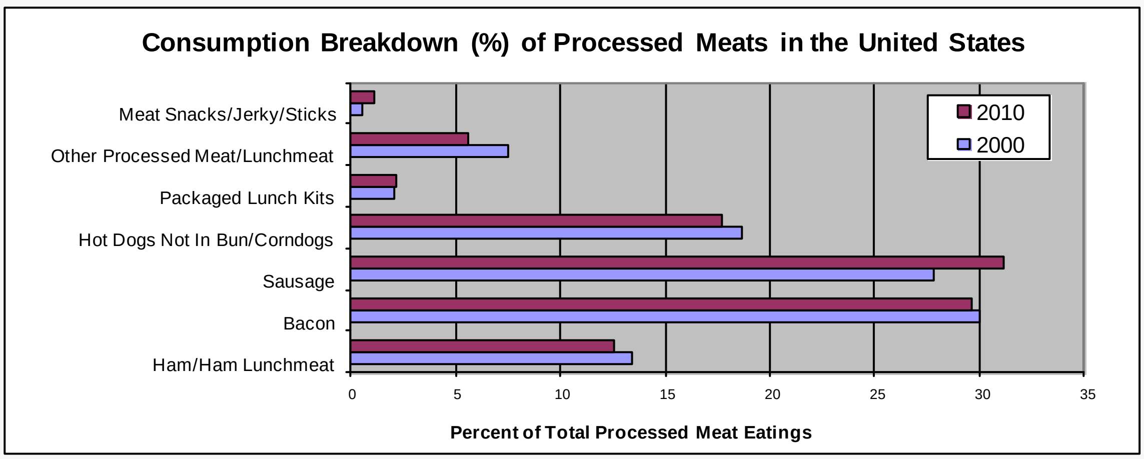
- Affluent single-person households
- Higher income households
- Younger homemakers (aged less than 25 years)
- Asian ethnic groups
- Residents of New England and the Mid-Atlantic (New York, New Jersey and Pennsylvania)

Consumption Locale

- The vast majority of processed meat eatings take place at home (97%). The remaining 3% of eatings are carried from home as a meal or snack.
- Americans primarily consume processed meats as a main dish (59.8%) or a side dish (30%), and occasionally as a snack (5%).
- Compared to the overall American average, consumers in the East South Central states[3] consume the greatest amount of processed meats (sausage and bacon, in particular).

Consumption Calendar

- Processed meats consumed at home are primarily eaten at breakfast (49%), followed by dinner (27.8%) and lunch (18%). Only a small percentage of eatings are carried from home for lunch (2.5%) or eaten at home as a snack (2.2%).
- Processed meats are typically consumed during the weekdays (62.5% versus 37.5% on weekends).
- Processed meats are consumed fairly evenly throughout the year with a slight increase in frequency during March, April and May.



[1]*Unless otherwise stated, all of the statistics on this page were derived from the NPD Group's National Eating Trends database, updated to November 2010, and reflects the eatings (defined by NPD as the number of times any particular category/item is eaten by an individual in a specified location or time period) of products at home, or products carried away from home. These figures do not reflect purchases of food products made through foodservice establishments, or the consumption thereof. NPD monitors the eating habits and attitudes of American consumers by surveying 5000 individuals reporting on 14-day's continuous consumption of all meals and snacks.*
[2]*Texas, Oklahoma, Arkansas, Louisiana, Kentucky, Tennessee, Missouri, Alabama, West Virginia, Virginia, North Carolina, South Carolina, Georgia, and Florida.*
[3]*Kentucky, Tennessee, Missouri and Alabama.*

CHILLED PROCESSED MEATS

A note about this section: The products in the chilled processed meat market are generally branded and processed with added ingredients such as marinade, spices, bread crumbs and salt. They are found in the chilled cabinets and fridges of grocery retailers. This data does not include meat sold in butcher shops. Chilled meat snacks are fully cooked meats that are ready for direct consumption, or that only require reheating. Items in the "others" sub-segment generally include some ready-meals with meat as the main ingredient, and offal.

- Bacon has the largest chilled retail market in the U.S at US$3.8 billion in 2010. "Other" chicken products, followed by beef sausages, pâté, and chicken nuggets, are also top selling chilled processed meat categories in the United States.

Chilled Processed Meat Market Sizes in the United States by Segment and Sub-segment in US$ Millions

Segment	Sub-segment	2007	2008	2009	2010	2013
Beef/Veal	Burgers	539.7	550.1	560.4	570.8	602.0
	Meatballs	388.2	391.7	395.1	398.4	408.4
	Minced meat	470.2	487.9	506.0	524.3	581.5
	Others	343.4	352.9	362.6	372.2	402.1
	Sausages	2,637.5	2,774.7	2,915.6	3,061.0	3,526.6
	Steaks/grills	960.4	982.6	1,004.9	1,027.2	1,094.8
	Whole/cuts/joints	779.4	805.8	832.3	859.3	943.0
Beef/Pork Mixture	Burgers	484.3	491.0	496.8	502.5	519.9
	Meatballs	498.3	510.5	521.2	531.7	563.9
	Others	640.2	649.6	658.7	667.2	690.9
	Sausages	408.7	415.5	421.2	426.4	442.1
Deli Foods	Cooked Meats	1,949.7	2,023.6	2,099.1	2,176.1	2,417.7
	Cured Meats	1,124.5	1,162.7	1,201.4	1,240.7	1,363.1
	Fermented Meats	1,320.8	1,312.9	1,305.2	1,297.9	1,276.6
	Pâté	2,206.7	2,292.9	2,381.0	2,470.4	2,750.5
Game/Others	Burgers	26.2	25.9	25.8	25.6	25.0
	Filet	60.7	59.0	57.3	56.4	51.3
	Legs	41.1	40.6	40.1	40.1	38.2
	Meatballs	29.8	28.9	28.0	27.4	24.6
	Minced meat	43.8	43.6	43.4	43.7	42.6
	Others	53.8	52.2	50.7	50.0	45.4
	Sausages	16.3	15.6	15.0	14.6	12.7
	Steaks/grills	51.0	49.3	47.7	46.8	41.8
	Whole	58.0	57.6	57.3	57.7	56.2
Lamb	Burgers	67.7	68.2	68.6	68.8	69.5
	Meatballs	67.6	68.2	68.5	68.9	69.8
	Minced meat	52.3	53.2	53.9	54.8	56.9
	Others	239.5	244.4	248.7	252.8	264.7
	Sausages	30.9	31.5	31.8	32.3	33.4
	Steaks/grills	54.9	55.4	55.9	56.1	56.9
	Whole/cuts/joints	181.9	181.1	180.7	180.1	178.4

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CHILLED PROCESSED MEATS (continued)

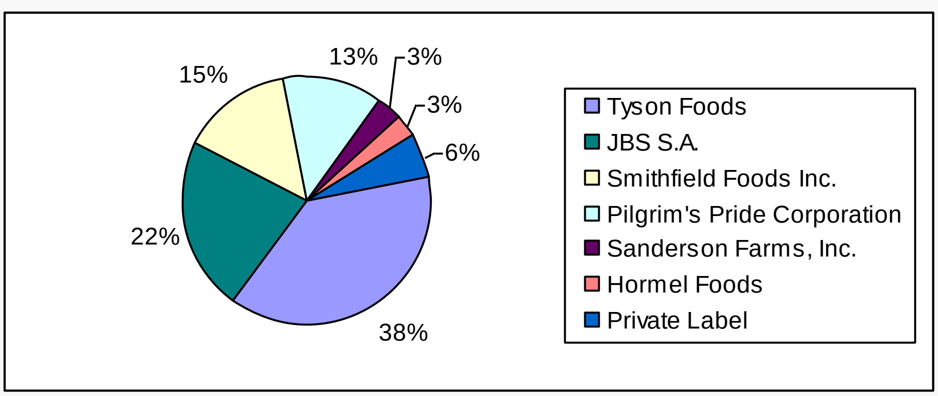
Chilled Processed Meat Market Sizes in the United States by Segment and Sub-segment in US$ Millions (Continued)

Segment	Sub-segment	2007	2008	2009	2010	2013
Meat Snacks	Burgers	41.1	41.7	42.2	42.8	44.1
	Hotdogs	55.1	56.0	56.9	58.0	61.5
	Others	8.8	8.9	9.1	9.2	9.4
	Wraps	24.5	25.2	25.8	26.4	28.1
Pork	Bacon	3,459.3	3,564.0	3,670.1	3,777.6	4,109.0
	Burgers	449.8	464.7	479.8	495.1	542.4
	Meatballs	314.9	325.7	336.5	347.6	382.0
	Minced meat	85.6	88.4	91.2	94.2	103.0
	Others	207.4	206.5	205.6	204.7	202.3
	Sausages	1,636.6	1,672.8	1,709.3	1,745.9	1,857.4
	Steaks/grills	852.0	872.2	892.3	912.5	974.2
	Whole/cuts/joints	545.2	564.4	583.9	603.6	665.4
Poultry	Burgers	798.5	801.6	804.6	807.6	816.3
	Drumsticks	479.2	496.4	514.0	531.7	586.7
	Filet	1,340.4	1,390.3	1,440.8	1,492.2	1,652.0
	Legs	286.5	294.9	303.3	311.8	337.7
	Nuggets	2,271.1	2,335.4	2,399.9	2,465.0	2,664.2
	Others	3,263.3	3,351.6	3,440.2	3,529.4	3,801.8
	Whole	772.0	797.6	823.6	849.9	931.3
	Wings	292.3	300.2	308.1	316.1	340.3

Source: *Datamonitor, 2011.*

- In 2009, Tyson Foods Inc. had the largest market share (38%) for chilled processed meats in the U.S. Some of its brands include Tyson, Wright, and Wilson.
- In terms of deli meats, the top company shares in 2009 were: Kraft Foods (28.5%), Sara Lee Corporation (10.2%), Carl Budding (4.4%), Hormel Foods (2.5%), Land O'Frost (2.4%) and private label (14.9%).

Company Shares (%) of the Chilled Processed Meat Market in the United States, 2009

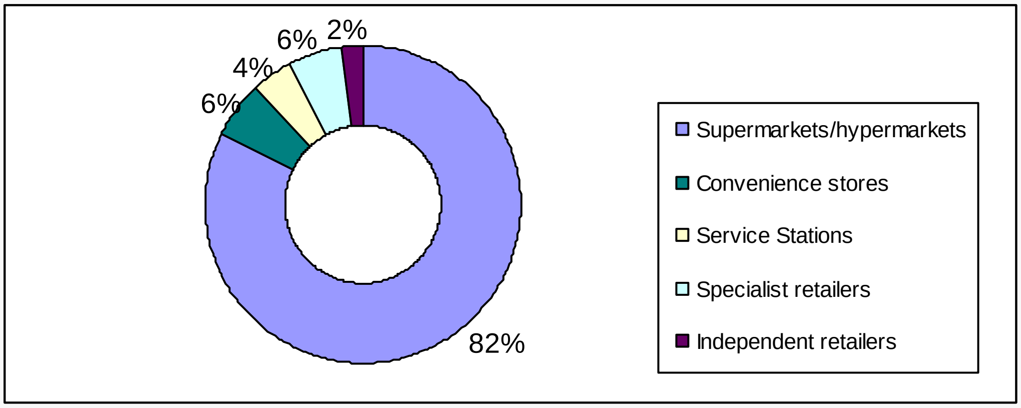


Source: *Datamonitor, 2011.*

CHILLED PROCESSED MEATS (continued)

- About 82% of all retail chilled processed meat sales in the U.S. took place through supermarkets or hypermarkets in 2009.

Retail Distribution Shares (%) of Chilled Processed Meat Sales in the United States, 2009



Source: *Datamonitor, 2011.*

FROZEN PROCESSED MEATS

A note about this section: The products in the frozen processed meat market are generally branded and processed with added ingredients such as marinade, spices, bread crumbs and salt. They are found in the freezer section of grocery retailers and include both raw and processed products. The frozen whole/cuts/joints beef and pork segments are pre-packaged and prepared for sale with little or no need for a butcher on site. This data does not include meat sold in butcher shops. Items in the "other" sub-segment generally include some ready-meals with meat as the main ingredient, and offal. Frozen meat snacks in the table below are fully cooked meats that only need to be reheated for consumption.

- "Other" frozen processed poultry is the largest retail segment in the U.S with a value of US$4.2 billion in 2010. Other popular frozen meat segments include: beef, veal and pork in the "other" category; chicken nuggets; and minced beef.

Frozen Processed Meat Market Sizes in the United States by Segment and Sub-segment in US$ Millions

Segment	Sub-segment	2007	2008	2009	2010	2013
Beef/Veal	Burgers	216.2	223.5	231.0	238.6	262.1
	Meatballs	136.7	140.5	144.2	148.1	159.8
	Minced meat	547.1	557.6	568.2	578.9	611.7
	Others	864.8	883.9	903.4	922.8	981.9
	Sausages	159.4	163.7	167.9	172.3	185.5
	Whole/cuts/joints	134.5	134.6	134.8	135.1	135.6

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FROZEN PROCESSED MEATS (continued)

Frozen Processed Meat Market Sizes in the United States by Segment and Sub-segment in US$ Millions (Continued)

Segment	Sub-segment	2007	2008	2009	2010	2013
Beef/Pork Mixture	Burgers	196.7	198.0	198.3	198.7	203.7
	Meatballs	458.6	461.8	463.4	465.0	476.1
	Minced meat	0.0	0.0	0.0	0.0	0.0
	Others	466.3	474.3	480.7	487.3	505.2
	Sausages	187.2	189.7	191.1	192.3	196.4
Game/Others	Burgers	65.9	65.5	64.3	63.3	60.3
	Filet	101.3	104.5	106.5	108.8	116.2
	Legs	88.3	89.2	88.9	88.7	88.6
	Meatballs	53.5	52.1	50.0	48.0	42.4
	Minced meat	244.1	250.3	253.8	257.8	272.0
	Others	185.9	188.2	188.4	188.7	189.5
	Sausages	51.6	50.6	48.9	47.4	43.2
	Whole/cuts/joints	196.0	201.5	204.5	207.9	220.2
Lamb	Burgers	23.7	23.7	23.7	23.6	23.5
	Meatballs	19.0	19.0	18.9	18.9	18.7
	Minced meat	9.7	9.9	9.9	10.0	10.1
	Others	42.6	42.8	42.8	42.8	42.8
	Sausages	2.4	2.4	2.4	2.3	2.3
	Whole/cuts/joints	36.2	36.4	36.4	36.3	36.1
Meat Snacks	Burgers	35.1	35.6	35.9	36.3	37.4
	Hotdogs	40.7	41.2	41.8	42.5	44.8
	Others	1.8	1.8	1.8	1.8	1.9
	Wraps	26.1	26.7	27.3	27.9	29.6
Pork	Bacon	15.7	16.0	16.3	16.5	17.4
	Burgers	57.8	58.7	59.6	60.6	63.5
	Meatballs	2.0	2.0	2.0	2.0	2.0
	Minced meat	4.2	4.0	3.8	3.7	3.3
	Others	459.1	473.4	488.0	502.8	548.4
	Sausages	84.7	85.1	85.6	85.9	87.1
	Whole/cuts/joints	13.2	12.8	12.6	12.3	11.6
Poultry	Burgers	289.4	299.4	309.7	320.1	353.1
	Drumsticks	136.4	141.9	147.7	153.7	172.7
	Filet	146.9	151.2	155.5	159.9	173.5
	Legs	48.7	50.8	53.0	55.3	62.8
	Nuggets	524.7	544.1	564.1	584.2	647.2
	Others	3,747.7	3,908.5	4,074.0	4,243.5	4,777.4
	Whole	301.4	317.6	334.5	351.9	407.8
	Wings	146.1	153.5	161.1	169.0	194.1

Source: *Datamonitor, 2011.*

FROZEN PROCESSED MEATS (continued)

- Much like chilled processed meats, in 2009, Tyson Foods Inc. had the largest market share (21.2%) for frozen processed meats in the U.S. Its main brand is Tyson. The second leading company was JBS S.A., whose main brands included Swift & Co., American Reserve, Cedar River Farms, Moyer, Showcase, Blue Ribbon Beef, Angus Select, and Liberty Bell.

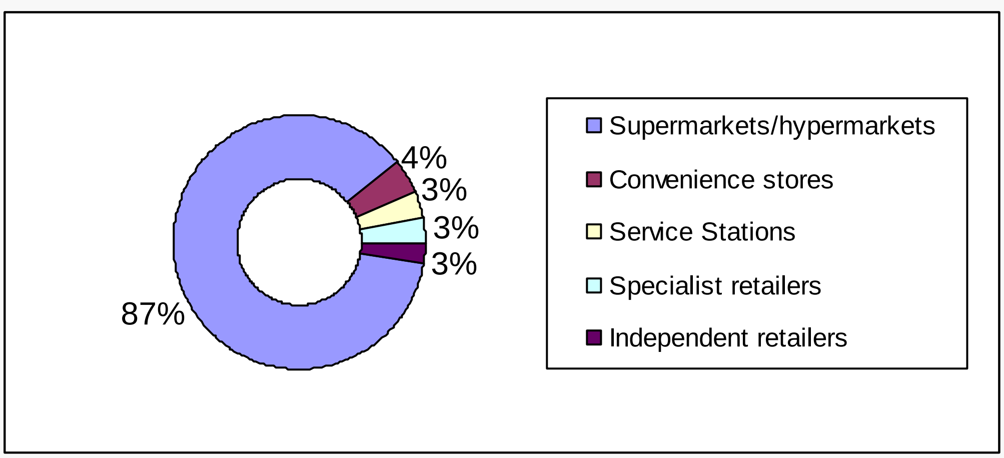
Market Shares (%) of Frozen Processed Meat in the United States, 2009

Company	% Share
Tyson Foods Inc.	21.2
JBS S.A.	6.3
Pilgrim's Pride Corporation	6.1
Sanderson Farms, Inc.	1.8
Advance Food Company Inc.	1.5
Flaanders Provision Company, LLC	0.8
Moran's All Natural	0.6
J&B Group	0.4
Cargill, Inc.	0.3
Holten Meat Inc.	0.3
Private Label	14.9

Source: *Datamonitor, 2011.*

- In 2009, about 87% of all frozen processed meat sales through the retail format in the U.S. were sold in supermarkets or hypermarkets.

Retail Distribution Shares (%) of Frozen Processed Meat in the United States, 2009



Source: *Datamonitor, 2011.*

CANADIAN EXPORTS

- Fresh or chilled pork is the largest pork category exported from Canada to the U.S., valued at C$244.8 million in 2010. Pork bellies and frozen pork cuts are also popular.

Canadian Exports of Pork and Pork Products to the United States in C$

HS Code	2008	2009	2010	August 2011
02031999 - Pork, nes,* fresh or chilled	255,981,142	209,225,583	244,829,082	164,203,248
02031991 - Pork bellies, fresh or chilled	100,152,447	113,155,329	166,093,180	151,208,673
02032900 - Swine cuts, frozen nes	94,185,340	102,503,698	125,958,081	68,361,792
02101210 - Side bacon, cured	66,931,962	65,650,768	67,076,437	50,568,266
02031210 - Hams, and cuts thereof, bone in, fresh or chilled	61,380,159	89,154,519	116,594,943	49,136,877
02031220 - Pork shoulders and cuts thereof, bone in, fresh or chilled	57,660,375	63,230,342	65,864,203	45,800,921
16024110 - Hams and cuts thereof, prepared or preserved in airtight container	42,067,264	39,602,187	38,008,843	25,330,205
16010090 - Sausages and simulated products of meat, meat offal or blood and food preparations, nes	25,860,563	25,670,338	21,161,559	15,643,809
16024900 - Swine meat and meat offal nes, excluding livers, including mixtures, prepared or preserved	20,651,730	20,453,049	15,928,214	11,120,979
02101990 - Pork meat, cured, nes	17,576,422	17,980,965	14,760,775	9,892,102
02031910 - Pork spare ribs, fresh or chilled	15,555,187	11,310,075	13,142,933	8,222,257
02032200 - Hams, shoulders and cuts thereof, of swine, bone in, frozen	7,240,710	12,485,370	12,112,127	7,853,673
02063000 - Swine edible offal, fresh or chilled	9,876,884	12,182,948	11,958,593	7,569,396
15010010 - Lard other than headings 02.09 or 15.03	4,193,232	7,439,159	7,567,953	6,084,074
02064900 - Swine edible offal, frozen nes	5,904,913	5,306,673	5,221,600	4,789,169
02101120 - Pork shoulders and cuts thereof, bone in, cured	1,298,565	1,040,383	2,051,868	3,317,976
16024190 - Hams and cuts thereof, prepared or preserved excluding in airtight containers	13,503,793	10,665,600	7,353,945	2,652,220
16024210 - Pork shoulders and cuts thereof, prepared or preserved in airtight container	8,085,270	7,203,095	5,124,517	2,591,908
02090000 - Pig fat lean meat free and poultry fat unrendered, fresh, chilled, frozen or cured	1,398,152	1,151,998	1,989,852	2,454,757
02101910 - Back bacon	9,417,990	6,586,191	4,083,249	1,311,417
05040010 - Sausage casings, natural	6,520,077	6,225,367	2,457,290	631,472
02101290 - Pork bellies (streaky) and cuts thereof, (excluding side bacon) cured	284,243	315,841	184,222	111,402

Source: *Statistics Canada, 2011.* ***Note****: Only products with export values over C$100,000 are included.*
****NES =*** *not elsewhere specified.*

- Chilled and boneless bovine cuts are the most popular Canadian beef exports to the U.S. with a value of C$806 million in 2010.

Canadian Exports of Beef/Veal and Beef Products to the United States in C$

HS Code	2008	2009	2010	August 2011
02011020 - Veal carcasses and half carcasses, fresh or chilled	38,698,608	23,321,639	15,129,592	9,848,305
02011090 - Bovine (beef) carcasses and half carcasses, nes,* fresh or chilled	319,949	132,229	53,684	409,198
02012090 - Bovine cuts bone in, nes, fresh or chilled	67,517,420	77,381,668	106,209,307	52,227,143
02013010 - Bison cuts boneless, fresh or chilled	2,246,015	3,306,176	5,020,595	2,811,704
02013090 - Bovine cuts boneless, nes, fresh or chilled	754,782,732	740,431,455	805,966,552	471,478,131
02022000 - Bovine cuts bone in, frozen	6,989,970	5,898,735	10,657,530	6,759,558
02023000 - Bovine cuts boneless, frozen	80,674,631	42,987,227	35,517,658	24,500,618
020610 - Bovine edible offal, fresh or chilled	47,152,871	41,828,940	27,184,767	32,403,478
020621 - Bovine tongues, edible offal, frozen	6,864,443	4,189,173	5,338,592	5,075,911
020622 - Bovine livers, edible offal, frozen	188,787	151,960	116,345	255,216
020629 - Bovine edible offal, frozen nes	20,002,837	17,559,849	17,515,658	11,856,811
021020 - Bovine meat cured	912,744	632,152	631,435	453,491
160250 - Bovine meat and meat offal nes, excluding livers, prepared or preserved	6,894,475	5,359,485	5,278,805	3,099,020

Source: *Statistics Canada, 2011.* ***Note****: Only products with export values over C$100,000 are included.*
****NES =*** *not elsewhere specified.*

Canadian Exports of Chicken and Turkey Products to the United States in C$

HS Code	2008	2009	2010	August 2011
020714 - Chicken and capon cuts and edible offal, frozen	90,032,612	88,718,464	82,144,898	55,372,134
160232 - Chicken and capon meat and meat offal prepared or preserved excluding livers	57,465,937	66,637,337	73,714,998	50,612,856
020713 - Chicken and capon cuts and edible offal, fresh or chilled	29,494,858	26,956,353	19,416,836	12,932,894
020727 - Turkey cuts and edible offal, frozen	3,644,832	5,739,903	12,732,011	4,561,236
020711 - Chickens and capons, whole, fresh or chilled	11,051,389	10,215,485	5,236,373	1,861,582
020726 - Turkey cuts and edible offal, fresh or chilled	2,698,989	4,926,852	4,029,864	1,594,257
020712 - Chickens and capons, whole, frozen	2,501,990	3,522,088	3,679,272	1,389,062
160231 - Turkey meat and meat offal prepared or preserved, excluding livers	2,336,553	744,922	176,214	138,277

Source: *Statistics Canada, 2011.* ***Note****: Only products with export values over C$100,000 are included.*

GROCERY RETAIL

- Most of the grocery retailers in the U.S. are hypermarkets, large supermarkets or superstores. Wal-Mart Supercenters was the leading grocery retailer, with around 25.4% of the hypermarket/superstore category in 2010 (all data uses grocery data only), followed by Kroger, Target, Wal-Mart (regular), Publix, and Safeway, among many others.

- The cash and carries/wholesale clubs market was controlled by Costco with 48.5% of the category, followed by Sam's Club, BJ's Wholesale Club, GFS Marketplace, Smart & Final, and Smart Foodservice Cash & Carry.

- The leaders in the convenience and forecourt grocery retail category were 7-Eleven with 25.5% of the category, followed by ampm, Stripes, Speedway, Wawa, and Kangaroo Express, among others.

- The discount market in 2010 was controlled by Dollar General with 25.3% of the market, followed by Family Dollar, Aldi (Sud), Dollar Tree, Save-a-Lot, and Fred's.

- The supermarkets and neighbourhood stores (independent retailers) segment was controlled by Trader Joe's with 53.5% of the category.

Source: *Planet Retail, 2011.*

NEW PROCESSED MEAT PRODUCTS

- There were 2,608 new processed meat products (beef, pork, poultry, turkey, and/or lamb) introduced to American grocery retailers between January 1, 2008 and November 7th, 2011. Of these, 58% were in the chilled meat category, 34% were in the frozen category and the rest were in the shelf-stable category.

- The company with the most introductions from 2008 to 2011 was Aldi, with 152 new products. Hormel Foods introduced 71 new products, followed by Tyson (69), Supervalu (68), Roundy's (59), and Kraft Foods (57). Sara Lee, Kroger, Target and Wal-Mart rounded out the top ten.

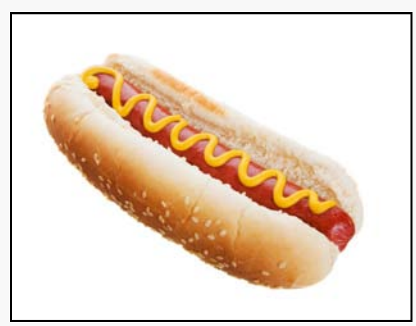
New Processed Meat Products in the U.S by Storage Type

Storage Type	2008	2009	2010	2011*
Chilled	455	305	445	308
Frozen	231	217	250	182
Shelf stable	62	52	54	47
Total # of Products	**748**	**574**	**749**	**537**

Source: *Mintel GNPD, 2011. *January 1, 2011 to November 7, 2011.*

- Of those 2,608 new processed meat products, price information was available for 1,689 (Mintel). Of these products, 196 were priced under US$2.51 each, 569 were priced between US$2.51 and US$5.00 each, 345 were priced between US$5.01 and US$7.50 each, 306 products were priced at US$7.51 to US$10.00, 101 products were priced from US$10.01 to US$12.50, and 172 were priced at US$12.51 and above.

- Other products introduced into the U.S market with beef, poultry, pork or lamb as an ingredient included: 514 prepared meals, 295 sandwiches/wraps, 233 pizzas, 173 hors d'oeuvres, 156 meat snacks, 154 soups, 103 meal kits, 47 pastry dishes, 39 meat stocks, and 38 salads.



Source: *Shutterstock.*

NEW PROCESSED MEAT PRODUCTS (continued)

- The most popular claim amongst new processed meat products in the U.S. was "microwaveable," followed by "no additives/preservatives," and "ease of use." Around 695 new processed meat products did not have any specific claims.

Top 10 New Processed Meat Product Claims in the U.S.

Claims	2008	2009	2010	2011*	Total
Microwaveable	175	205	272	190	**842**
No Additives/Preservatives	157	136	153	136	**582**
Ease of Use	73	105	193	113	**484**
Convenient Packaging	37	95	151	111	**394**
Low/No/Reduced Allergen	78	67	89	103	**337**
Gluten-Free	76	67	87	101	**331**
Premium	98	84	70	70	**322**
All Natural Product	103	69	81	66	**319**
Low/No/Reduced Fat	67	91	81	66	**305**
Time/Speed	59	69	103	56	**287**

Source: *Mintel GNPD, 2011. *January 2011 to November 7, 2011.*

NEW PRODUCT EXAMPLES

The following are examples of new processed meat products introduced to the U.S. market between 2009 and 2011, from the Mintel Global New Products Database.

Mediterranean Style Lamb & Beef Kabobs

Company: Superior Farms
Brand: Superior Farms Mediterranean Grill
Store Name: Wal-Mart
Date Published: October 2011
Pack Size: 425 g
Price in local currency: US$12.56
Storage: Chilled

Product Description

Mediterranean Style Lamb & Beef Kabobs are said to be "seasoned to perfection." The lamb and beef skewers are marinated with garlic, olive oil and a hint of lemon. This microwaveable product is certified by the United States Department of Agriculture (USDA), and retails in a 15 oz. (425 g) pack featuring simple cooking instructions.

NEW PRODUCT EXAMPLES (continued)

Gluten-Free Grilled Chicken Strips

Company: Target
Brand: Archer Farms (private label)
Store Type: Hypermarket
Date Published: December 2010
Pack Size: 227 g
Price in local currency: US$3.99
Storage: Chilled

Product Description

Archer Farms Grilled Chicken Strips are prepared from all white-meat chicken breast. This premium, heat and serve product is microwaveable.

Onion Garlic Flavoured Boneless Pork Roast

Company: Hormel Foods
Brand: Hormel Always Tender
Store Name: Schnucks
Store Type: Supermarket
Date Published: August 2011
Pack Size: 680 g
Price in local currency: US$6.49
Storage: Chilled

Product Description

Hormel Always Tender Onion Garlic Flavoured Boneless Pork Roast is ready to cook. The gluten-free product contains up to 30% of a patented flavouring solution and is coated with sauce.

Pork Skewers

Company: Aldi
Brand: Roseland (private label)
Store Type: Supermarket
Date Published: September 2009
Pack Size: 680 g
Price in local currency: US$5.99
Storage: Frozen

Product Description

Roseland Pork Skewers are described as skewers of tender and lean pork loin meat, perfectly seasoned with authentic Mediterranean flavour. This ready-to-cook product is claimed to be ideal for grilling and is said to be prepared with fresh ingredients to ensure the highest quality.

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