

MEAT AND POULTRY STILL RULE

EVEN IN A WORLD THAT'S CURIOUS ABOUT MEAT ALTERNATIVES

Worldwide demand for meat and poultry products continues to increase, even with a growing interest in plant-based protein. Meat-based diets are still the norm in Western societies, and meat avoiders like vegans and vegetarians represent a small minority.

<5%

Vegetarians account for significantly less than 5% of population in U.S. and UK.¹

49%

of consumers have tried a plant alternative to animal meat²

24%

of popular diet trends (including paleo, keto, etc.) include meat while restricting carbohydrates³

RED MEAT

THE RED MEAT CATEGORY* REACHED SALES OF \$47 BILLION IN 2018.⁴

*Includes beef, pork, lamb and other red meats in all forms, including ready-to-eat and heat-and-eat.

PACKAGED RED MEAT
\$47.3B
(+3.2% vs. 2017)

BEEF
\$36.4B
(+4.4% vs. 2017)

PORK
\$9.4B
(-0.6% vs. 2017)

OTHER RED MEAT
\$1.5B
(+0.2% vs. 2017)

AND, GROWTH CONTINUES...

\$48.2B
IN U.S. SALES, UP 1.9%
(2019, ESTIMATED)⁴

\$51.8B
IN U.S. SALES, UP 1.6%
(2023, FORECASTED)⁴



WHY PEOPLE LOVE IT:

Sheer enjoyment—red meat has a reputation for:

- GREAT TASTE
- PROTEIN BENEFITS
- PROVIDING SATIETY

People also love its **versatility**, and **convenient options** earn extra bonus points.

WHEN THEY EAT IT:

Red meat has strong ties to both **social and everyday occasions**, especially with multiple uses and recipes.

Breakfast and snacking opportunities mean brands can expand their reach.

WHERE THE OPPORTUNITY LIES

77% of consumers are actively trying to IMPROVE THEIR HEALTH, whether just a little or a lot.⁵

This creates both a challenge and an opportunity in a protein-centric landscape.

FRESH VS. FROZEN

Fresh is the #1 choice, with frozen and shelf-stable options following close behind.

BRANDS CAN CELEBRATE RED MEATS' **TASTE**, **NUTRITION**, AND **SATIETY**.

A new generation of convenience food is emerging amid consumers' healthy eating priorities.

ELEVATED CONVENIENCE IS KEY, WITH:

- Pre-cooked frozen options
- Meal kits
- Cook-in bags
- Vacuum-sealed options

WHO IS EATING MEAT?

SOME DEMOGRAPHIC HIGHLIGHTS⁶



Parenthood spurs consumption of red meats.

Younger men aged 18-44 and **fathers** are the most frequent red meat eaters.

But don't forget: Brands should also **focus on women**, who are likely consuming less meat than previous years

Consumers aged 18-44 are most likely to be **increasing** meat consumption.

CLEAN AND SIMPLE LABELS RESONATE

CONSUMERS ARE SEEKING OUT FRESHNESS AND CLEANER INGREDIENT LABELS.⁶

Clean label meats resonate with consumers and their perceptions of:

- QUALITY
- HEALTH
- VALUE

Consumers prioritize claims that convey natural, minimally processed red meats. They want to see signals of a less-processed product:

- CLEAN LABELS
- RECOGNIZABLE INGREDIENTS



POULTRY

THE POULTRY CATEGORY REACHED SALES OF \$25.8 BILLION IN 2018.⁷

MOST POPULAR CUTS⁸

67%
fresh, white parts

41%
frozen, white parts

41%
fresh, dark parts

40%
fresh, whole

38%
breaded frozen

24%
frozen, dark parts

AND, GROWTH CONTINUES...

\$26.1B
IN U.S. SALES, UP 0.7%
(2019, ESTIMATED)⁷

\$27.9B
IN U.S. SALES, UP 1.4%
(2024, FORECASTED)⁷



WHY PEOPLE LOVE IT:

Chicken is delicious—and a family favorite, for its⁹

- VERSATILITY
- AFFORDABILITY
- WIDE AVAILABILITY

WHEN THEY EAT IT:

Pretty much all the time: the largest share of consumers have eaten **four or more different cuts of poultry** over the last six months.⁹

Consumers choose **different cuts for different occasions**, recipes and even dayparts.

POULTRY IS LESS VULNERABLE TO SWITCHING BEHAVIOR, WITH A GREAT REPUTATION IN THE PROTEIN SPACE AS A HEALTHIER, MORE AFFORDABLE SOURCE OF PROTEIN.

WHERE THE OPPORTUNITY LIES

Chicken has nearly universal (91%) penetration¹⁰, so it's important for brands to leverage new occasions and usage.

FRESH VS. FROZEN

Fresh cuts and white meat cuts outperform frozen and dark counterparts. Consumers more strongly associate white meat to health, and dark meat with flavor and taste.⁷

A **4.9% sales increase in the MEAT SNACKS category** is fueled by consumer interest in protein¹¹, with opportunities for products such as **chicken jerky** and more **snack-friendly chicken bites**

BRANDS CAN LEVERAGE POULTRY FOR ITS' **VERSATILITY**, **NUTRITION**, AND **CONVENIENCE**.

A new generation of convenience food is emerging amid consumers' healthy eating priorities.

ELEVATED CONVENIENCE IS KEY, WITH:

- Snack-friendly versions
- Ready-to-eat options
- No-thaw options
- Prepared, pre-cut options

WHO IS EATING POULTRY?

SOME DEMOGRAPHIC HIGHLIGHTS¹²



With 91% penetration, it's no surprise that a **variety of consumers** love chicken.

Men and women consume poultry with similar frequency, but **women are far more likely to use poultry as an ingredient in recipes**.

Brands can appeal to **consumers across age groups**: With older consumers, attributes that signal freshness, like all natural and no additives/preservatives, resonate more.

Parents and non-parents consume poultry equally, but **parents are more likely to eat a variety of poultry options and cuts**.

Women, especially moms, are more likely to respond to **better-for-you claims** like all natural and antibiotic free.

Younger consumers consider holistic production values as important product attributes, like **organic and pasture raised**.

Simplicity and transparency are key for poultry eaters.

In fact, poultry products with natural and organic claims are experiencing strong sales growth and are often featured in new product development.

CLEAN AND SIMPLE LABELS RESONATE

Consumers want to see recognizable ingredients and label claims such as¹³:

- ALL-NATURAL (47%)
- NO ADDITIVES OR PRESERVATIVES (42%)
- ANTIBIOTIC-FREE (39%)
- NON-GMO (26%)

DELIVERING WHAT CONSUMERS WANT

How do you deliver consumer-pleasing meat products, in a meat-alternative world?
With Kemin shelf life, oxidation control and food safety solutions.

Today's consumers are reaching for simpler, 'free from' and clean label meat and poultry products, but taste is still at the top of their shopping list.

Kemin helps solve your color, freshness and safety challenges, while pleasing consumers at the same time.

You can trust Kemin and our portfolio of solutions to deliver the difference you need for your product to succeed.

SOLUTION	USE IT IN:	FOR:
FORTIUM® A Acerola Extract	fresh whole muscle and ground red meats, alternatively cured products	• Color protection, alone or in combination, as a direct addition or sprayed topically prior to packaging
FORTIUM® R Rosemary Extract	all poultry applications, dry and semi-dry sausages	• Flavor and color protection, best product for use alone in chicken and turkey • Replacing synthetic antioxidants or extending efficacy in combination with synthetics, at high use rate in pepperoni/salami
FORTIUM® RGT Rosemary + Green Tea Extract	all value-added beef/pork applications	• Flavor and color protection, most effective solution
BactoCEASE® Propionic Acid	only approved for use in RTE meats (deli, cooked sausage, etc.)	• Inhibiting listeria in RTE meats, can be used alone or in combination with lactate, diacetate or other synthetic antimicrobials
BactoCEASE® NV Buffered Vinegar	all meat products	• Clean label antimicrobial protection, applied by direct addition, spray, tumble, or injection. Cultured dextrose antimicrobials can be added to further inhibit spoilage bacteria
EN-HANCE® BHA EN-HANCE® BHT ENHANCE® Propyl Gallate	fresh sausage, dry and semi-dry sausages	• Delay oxidation, color and flavor loss. Standard traditional ingredients, can be used alone at 100 ppm or in combination with other synthetics at 200 ppm