

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.



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

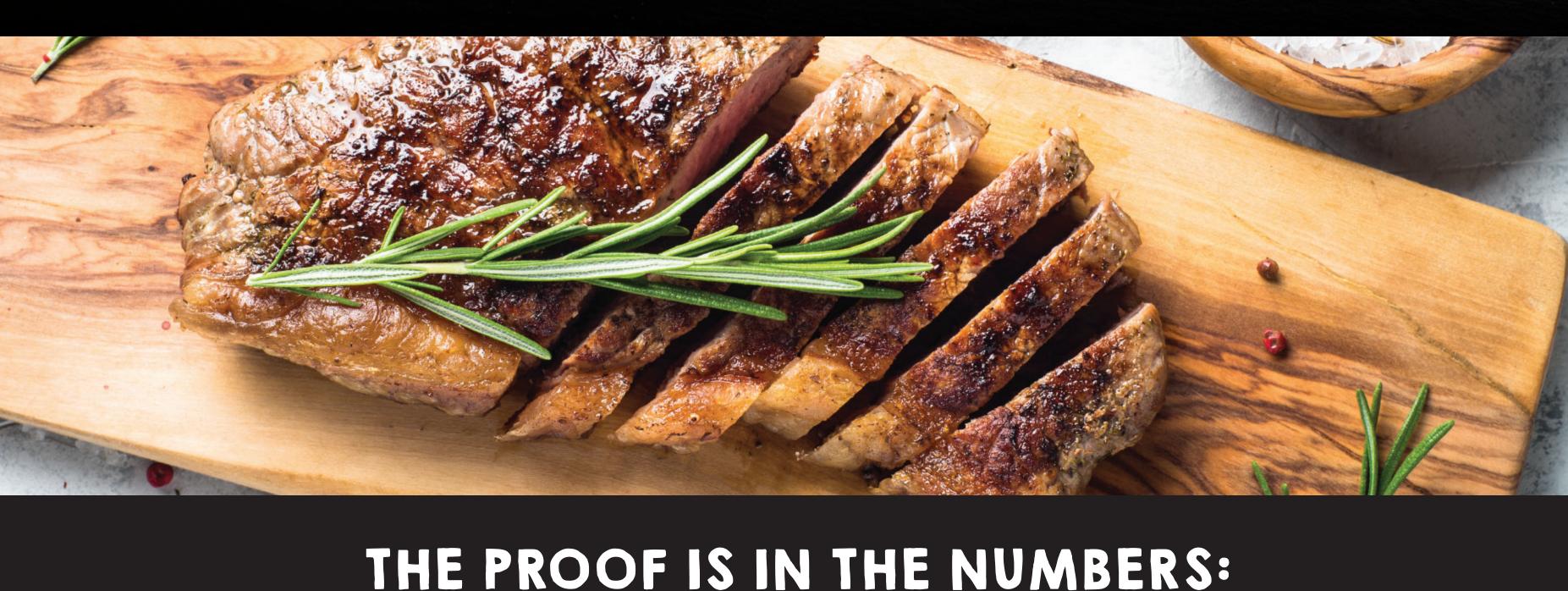


of consumers have tried a plant alternative to animal meat²



KEMIN

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



KED) MEAT

BILLION IN 2018.4 *Includes beef, pork, lamb and other red meats in all forms,

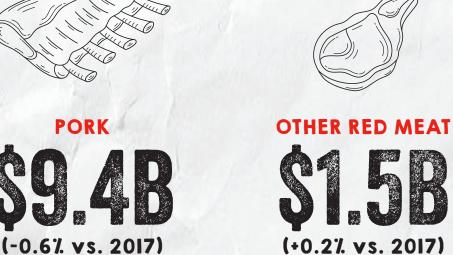
including ready to eat and heat and eat.

THE RED MEAT CATEGORY* REACHED SALES OF \$47









\$48.2B \$51.8B

AND, GROWTH CONTINUES...

IN U.S. SALES, UP 1.9% (2019, ESTIMATED)⁴

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.

THEY EAT IT: Red meat has strong ties to both social and everyday

WHEN

occasions, especially with multiple uses and recipes. **Breakfast and snacking**

opportunities mean brands can expand their reach.



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

OPPORTUNITY LIES

and an opportunity in a protein-centric landscape.

Fresh is the #1 choice, with

following close behind.

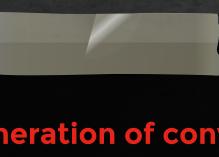
frozen and shelf-stable options

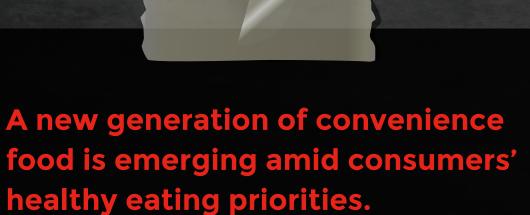
NUTRITION TASTE

BRANDS CAN CELEBRATE



RED MEATS





ELEVATED CONVENIENCE IS KEY, WITH: **Pre-cooked frozen options**

Meal kits **Cook-in bags** Vacuum-sealed options





But don't forget: Brands should also focus on women, who are

Parenthood

spurs consumption

of red meats.

Consumers aged 18-44 are most likely

to be increasing meat

consumption.

Younger men aged 18-44

and fathers are the most

frequent red meat eaters.

likely consuming less meat than previous years

CONSUMERS ARE SEEKING OUT FRESHNESS AND CLEANER INGREDIENT LABELS.6

LABELS RESONATE

Clean label meats resonate with consumers and their perceptions of:

HEALTH VALUE

RECOGNIZABLE INGREDIENTS

Consumers prioritize claims that convey natural,

minimally processed red meats. They want to see

- signals of a less-processed product: CLEAN LABELS

POULTRY

THE POULTRY CATEGORY

REACHED SALES OF \$25.8

BILLION IN 2018.7

QUALITY

40% fresh, whole

fresh, white parts

MOST

POPULAR

30% breaded frozen

frozen, white parts

24% frozen, dark parts

fresh, dark parts

AND, GROWTH CONTINUES... \$26.1B

IN U.S. SALES, UP 0.7%

\$27.9B IN U.S. SALES, UP 1.4%

(2024, FORECASTED)⁷







(2019, ESTIMATED)⁷



and usage.

FRESH VS.

FROZEN

OPPORTUNITY LIES

Chicken has nearly universal (91%)

penetration⁷, so it's important for

brands to leverage new occasions

flavor and taste.7

Fresh cuts and white meat cuts

counterparts. Consumers more

strongly associate white meat

to health, and dark meat with

outperform frozen and dark

WHY

PEOPLE LOVE IT:

Chicken is delicious-and

a family favorite, for its'

VERSATILITY

AFFORDABILITY

WIDE AVAILABILITY

WHEN

Pretty much all the time: the

Consumers choose different

cuts for different occasions,

recipes and even dayparts.

largest share of consumers have

eaten four or more different cuts

of poultry over the last six months.⁷

THEY EAT IT:

A new generation of convenience

food is emerging amid consumers'

BRANDS CAN LEVERAGE

POULTRY FOR ITS'

MEAT SNACKS category is fueled by consumer interest in protein⁷, with opportunities for products such as chicken jerky and more

A 4.9% sales increase in the snack-friendly chicken bites

With 91%

penetration, it's no

surprise that a variety

of consumers

love chicken.

Parents and

non-parents consume

poultry equally, but

parents are more likely

to eat a variety of poultry

options and cuts.

IS KEY, WITH: Snack-friendly versions **Ready-to-eat options**

No-thaw options

healthy eating priorities.

ELEVATED CONVENIENCE

Prepared, pre-cut options

similar frequency, but women are far more likely to use poultry as an ingredient in recipes.

CLEAN AND SIMPLE

LABELS RESONATE

Consumers want to see recognizable

IS EATING POULTRY? SOME DEMOGRAPHIC HIGHLIGHTS7

WHO

transparency are key for poultry eaters. In fact, poultry products with

Simplicity and

USE IT IN:

cured products

fresh whole muscle and

all poultry applications,

all value-added beef/

pork applications

dry and semi-dry sausages

ground red meats, alternatively

SOLUTION

FORTIUM® A

FORTIUM® R

Rosemary Extract

FORTIUM® RGT

Green Tea Extract

Rosemary +

BactoCEASE®

⁶ Better for You Eating Trends, U.S., July 2018

⁷ Poultry, U.S., Mintel, December 2019

Propionic Acid

Acerola Extract

development.

better-for-you claims

like all natural and

antibiotic free.

Brands can appeal to Men and women consumers across age groups: With older consumers, consume poultry with attributes that signal freshness, like all natural and no additives/preservatives, resonate more. Women, especially **Younger consumers** consider holistic moms, are more likely to respond to production values

as important product

attributes, like organic

and pasture raised.

ingredients and label claims such as⁷: natural and organic claims are experiencing strong sales **€** ALL-NATURAL (47%) growth and are often **NO ADDITIVES OR PRESERVATIVES (42%)** featured in new product **ANTIBIOTIC-FREE (39%)** NON-GMO (26%)

DELIVERING WHAT CONSUMERS WANT

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.

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

FOR:

• Color protection, alone or in combination, as a direct addition or sprayed topically prior to packaging • Flavor and color protection, best product for use alone in chicken and turkey

only approved for use in RTE • Inhibiting listeria in RTE meats, can be used alone or in combination meats (deli, cooked sausage, etc.) with lactate, diacetate or other synthetic antimicrobials • Clean label antimicrobial protection, applied by direct addition, all meat products spray, tumble, or injection. Cultured dextrose antimicrobials can be added to further inhibit spoilage bacteria • Delay oxidation, color and flavor loss. Standard traditional fresh sausage, dry and ingredients, can be used alone at 100 ppm or in combination semi-dry sausages



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Sources 1https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6479556/ ²https://foodinsight.org/consumer-survey-plant-alternatives-to-meat/ ³https://foodinsight.org/one-third-of-americans-are-dieting-including-one-in-10-who-fast-while-consumers-also-hunger-for-organic-natural-and-sustainable/ ⁴Packaged Red Meat, U.S., Mintel, March 2019 ⁵Healthy Lifestyles, U.S., Mintel, November 2018

BactoCEASE® NV Buffered Vinegar EN-HANCE® BHA EN-HANCE® BHT with other synthetics at 200 ppm **ENHANCE® Propyl Gallate**

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

> with synthetics, at high use rate in pepperoni/salami • Flavor and color protection, most effective solution

• Replacing synthetic antioxidants or extending efficacy in combination