

# POULTRY CONSUMPTION – RETAIL – THAI CONSUMER – 2021

Drive the future relevance of the poultry category by enhancing poultry's health value, riding on the plant-based trend and offering innovative home-cook solutions.



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# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

### Market context

- COVID-19 has driven an increase in home cooking of poultry among consumers living with family
- COVID-19 has increased food safety concerns regarding poultry consumption
  - Graph 1: reasons for consuming less poultry during the COVID-19 outbreak, 2021
- The poultry category faces risk of losing future relevance

### What consumers want and why

- Consumers want: freshness
  - Graph 2: important factors of consideration for the purchase of poultry products (any rank), 2021
- Consumers want: clean and natural poultry products
- Consumers want: ethically sourced poultry
- Consumers want: products that enhance the home cooking experience of poultry
- Consumers want: poultry products curated to specific lifestyles

### Opportunities

- Communicate on nutritional and natural to build the health image of poultry products
- Provide chef-hacks to enhance the home cooking experience
- Build sustainability credentials and provide transparent sourcing details
- Tap into the snacking lifestyle with healthy poultry snacks

### Competitive landscape

- Domination by market giant sets high competitive and entry barriers

### Mintel predicts

- The outlook for poultry in Thailand
- The marketing mix

## KEY TRENDS

- What you need to know

### Added focus on health and the plant-based momentum

- Consumers move beyond temptation to seek health benefits

- The plant-based diet is becoming a lifestyle in the pursuit of healthy living
- Strong global momentum of "all-natural" poultry innovations
  - Graph 3: share of launches in the poultry sub-category, by top 10 claims category, 2018-21
- To fit in with the plant-based diet, plant-based meat booms globally and locally

### **Eco-wakening: the rise in sustainable consumer behaviour**

- Concerns regarding animal welfare drive new sourcing standards
- Thailand's first ever cage-free egg standard to be certified
- Mintel Trend: Rethink Plastic

### **Convenience and experience becomes the core of consumers' lives**

- Mintel Trend: Life hacking
- COVID-19 has given rise to experimentation in the kitchen
- Thai food brands are enhancing the home cooking experience for consumers

## **CONSUMER INSIGHTS**

- What you need to know

### **Consumption of poultry by type**

- Chicken drives near universal consumption of poultry
  - Graph 4: type of poultry consumed, 2021
- Consumption of duck and turkey lags among 45+ consumers
  - Graph 5: type of poultry consumers, by age group, 2021
- Cost and availability are barriers towards consumption of duck and turkey
  - Graph 6: consumption of different types of poultry, by monthly household income, 2021

### **Consumption of poultry by formats**

- The consumption of roasted, ready-to-eat and unprepared chicken portions rises
  - Graph 7: change in consumption of poultry formats compared to last year (2020), 2021
- Younger Millennials explore a wide range of poultry food formats
  - Graph 8: repertoire of any format of poultry consumed among consumers aged 25-34 vs total, 2021
- Convenience drives increase in consumption of roasted, ready-to-eat chicken among urbanites
  - Graph 9: increase in consumption of roasted, ready-to-eat chicken (whole or other portion) compared to last year (2020), by region, 2021
- Home cooking drives increase in consumption of unprepared chicken portions among parents
  - Graph 10: increase in consumption of unprepared portions/fillets/diced chicken compared to last year (2020), by parental status, 2021
- Decrease in consumption of whole chicken signifies the need for ease-of-preparation
  - Graph 11: decrease in consumption of unprepared whole chicken compared to last year (2020), by age group, 2021

- Graph 12: change in consumption of select poultry formats compared to last year (2020), 2021
- Consumption of pre-marinated chicken portions take a dip
  - Graph 13: change in consumption of select poultry formats compared to last year (2020), 2021
- Opportune time to increase relevance of other poultry in meal planning
  - Graph 14: change in consumption of select poultry formats compared to last year (2020), 2021

### Areas of focus for early management of consumption decrease

- High penetration of poultry may not translate to a secure future
- Food safety: main concern that pushes consumers away from poultry
  - Graph 15: reasons for consuming less poultry during the COVID-19 outbreak, 2021
- Address concerns regarding safety of poultry among parents with young children in the household
  - Graph 16: select reason for consuming less poultry during the COVID-19 outbreak (ie post March 2020), by parental status, 2021
- The disruption of the plant-based trend is an alarming bell for poultry
  - Graph 17: select reason for consuming less poultry during the COVID-19 outbreak (ie post March 2020), by age group, 2021
- Ride on the plant-based trend with blended poultry innovations
- Sustainability becomes a concern among affluent consumers
  - Graph 18: select reason for consuming less poultry during the COVID-19 outbreak (ie post-March 2020), by financial situation, 2021

### The health value of poultry

- Build the health image of poultry among less affluent consumers
  - Graph 19: any agreement with the statement "poultry is an excellent source of protein", by financial situation, 2021
- Nutritional value is important to Bangkokians
- Combat concerns among parents with communications on nutritional value
  - Graph 20: agreement with the statement "I prefer to consume poultry which is high in nutrients (eg iron, vitamin B)", by parental status, 2021
- Dial up the health and safety image of poultry with use of natural ingredients
  - Graph 21: preference towards poultry with natural ingredients, by select reasons for consuming less poultry, 2021

### Purchase motivators of poultry

- Freshness trumps by big margins
  - Graph 22: top three most important factors of consideration when purchasing a poultry product (any rank), 2021
- Freshness quality of current poultry offerings do not meet expectations of affluent consumers
  - Graph 23: select reason for consuming less poultry during the COVID-19 outbreak, by household income level, 2021
- Clean poultry becomes essential for driving purchase
  - Graph 24: any rank 'antibiotic-free' as important factor of consideration when purchasing poultry products, by age group, 2021



- Organic poultry innovations can help hold back consumers from switching to alternate protein options
- Antibiotic-free claims can appeal to consumers' ethics and safety expectations
  - Graph 25: 'antibiotic-free' as an important purchase factor of poultry products (any rank), total vs consumers who consumed less poultry in 2021 compared to last year because of ethical sourcing reasons, 2021
- Hormone-free claims will help communicate higher safety standards for parents
  - Graph 26: 'hormone free' as an important factor of consideration upon the purchase of poultry products (any rank), by parental status, 2021
- Low-fat claims will help prevent loss of poultry relevance among diet-conscious consumers
  - Graph 27: 'low fat' as an important purchase factor of poultry products (any rank), total vs consumers who consumed less poultry in 2021 compared to last year because they are on a diet, 2021

### Meeting the in-home trend of cooking poultry

- Poultry becomes part of Thai families' home-cooked meals
  - Graph 28: select behaviour "I have switched from buying ready-to-eat poultry to cooking more poultry dishes at home in the last 12 months", by living situation, 2021
- Kitchen experimenting: offer innovative poultry recipe ideas to drive appeal among Thai urban-dwelling families
  - Graph 29: agreement with the statement "I try out new recipes in my kitchen that feature poultry", by area, 2021
  - Graph 30: agreement with the statement "I try out new recipes in my kitchen that feature poultry", by living situation, 2021
- Provide recipe ideas on packaging to encourage purchase among parents
  - Graph 31: any agreement with the statement "poultry products with recipes on packs would be appealing", by parental status, 2021
- Cater to in-home stocking needs among Bangkokians
  - Graph 32: agreement with the statement "I store big pack sizes of poultry products at home", by region, 2021

### Customise poultry products to specific lifestyles

- The next step forward: demand for lifestyle curation
- Protein levels of current poultry offerings aren't able to meet lifestyle needs
  - Graph 33: any agreement with the statement "it is hard to choose the poultry product that would be most suitable for specific lifestyle needs (eg while exercising, dieting)", total vs % of consumers that have consumed less poultry in 2021 compared to last year because the protein level in current poultry products is not sufficient, 2021
- Curate poultry products to the 'fitness lifestyle' of younger Millennials
  - Graph 34: any agreement with the statement "it is hard to choose the poultry product that would be most suitable for specific lifestyle needs (eg while exercising, dieting)", by age group, 2021
- Meet the 'snackification' Millennial lifestyle with snackable poultry formats
  - Graph 35: any agreement with the statement "a wider variety of poultry-based snacks would be appealing", by age group and area, 2021

### Ethical and ecological expectations from poultry

- Transparent and traceable sourcing will help reduce concerns among parents

- Graph 36: any agreement with the statement "packaging of poultry products should include traceable origins", by parental status, 2021
- Opportunity for premiumisation with pasture-raised poultry
  - Graph 37: any agreement with the statement "ethically sourced poultry is worth paying more for (eg pasture-raised)", by monthly household income, 2021
- Appeal to urbanites with non-plastic packaging of poultry
  - Graph 38: any agreement with the statement "the use of plastic for packaging poultry products is concerning", by area, 2021

## MARKET APPLICATIONS

- What you need to know

### **Better-for-you innovations: focus on nutrition and naturalness to dial up the health and safety image of poultry**

- Dial up focus on nutritional claims
  - Graph 39: share of launches in the poultry sub-category, by top 10 claims, 2018-21
- Innovate with high/added protein claims
- Low-in claims can communicate a better-for-you image
- Poultry can be positioned as a leaner alternative to pork/beef
- Child-friendly innovations can help drive appeal among parents
- All-natural innovations: a minimally tapped market space
  - Graph 40: share of launches in the poultry sub-category, by top 15 claims, 2018-21
- Inspiration for all-natural innovations

### **Driving in-home relevance: enhance the home cooking trend of poultry with chef hacks**

- More flavours and recipes can inspire new meal ideas
  - Graph 41: share of launches in the poultry sub-category, by top 10 flavours, 2018-21
- Flavoured recipe ideas by well-known chefs
- Christmas recipes and more! D'Artagnan provides recipe ideas for all cooking skills and various occasions
- Ease the preparation process to enhance the home cooking experience
- Inspiration for enhancing the home-cook experience with meal kits for fancy recipes

### **Curate poultry products to specific lifestyles**

- Position poultry for muscle building
- On-the-go lifestyle: single serve, convenient and mess-free
- Target the snacking occasion: Frank's RedHot launches boneless chicken bites for snacking in Original and Buffalo flavours
- Snackification: entry into children's snacking lifestyle

### **Build ethical and ecological credentials for poultry products**

- Transparent sourcing details: pasture-raised, free-range poultry
- Early initiatives with no plastic packaging will help brands go a long way

### **APPENDIX**

- Consumer research methodology

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