

THE FUTURE OF MEAT, POULTRY AND FISH: 2019

Global Annual Review: what's now and what's next for the meat, poultry and fish markets.



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Report Content

- A look back, and a look ahead

THE BIG STORIES

- Mintel's perspective

Meat alternatives mainstream

- Meat alternatives make inroads
 - Graph 1: protein consumption frequency, Sep 2018
- Meatless "meat" spans formats and categories
- Reduced-meat options bridge the gap
- European consumers show interest in veggie-accented meat products

Meat and poultry step up the competition

- Brazilian burgers have become gourmet
- Gourmet burgers have recently come to Brazil
- Restaurants experiment with new burgers to draw in burger-obsessed Brazilians
- Chick-fil-A tests meal kits in Atlanta stores
- Chick-fil-A meal kits offer a new kind of convenience

Animal welfare becomes a hot topic

- Ethical claims grow across the meat industry
- Ethical claims grow across meat, poultry, and fish
 - Graph 2: meat, poultry, and fish introductions, select ethical claims, 2016-18
- Consumers value meat from animals that were raised humanely
- Cows leap for joy at grazing on grass
- European consumers feel passionate about animal welfare
 - Graph 3: users who consider "high animal welfare" an important quality when purchasing meat, seafood, or poultry, 2018

IN THE NEXT TWO YEARS

- Mintel's perspective

A desire for sustainability drives innovation

- Meat consumers are thinking about sustainability
- Sustainability messaging helps brands stand out

The Future of Meat, Poultry and Fish: 2019

- Animal production will get more sustainable through company-led partnerships
- Companies will position themselves as leaders in sustainability

Upcycling moves into the meat industry

- "Waste Not" enters the meat category as consumers look for ways to fight food waste
- Upcycling will boost sustainable positioning on meat-based snacks
- The seafood industry holds promise for upcycling
- "Trash" fish could serve as a plentiful source for upcycled seafood products

The definition of "humanely raised" will evolve

- Companies will be challenged to raise the stakes in "humanely raised"
- Slow-growth chicken may be the next animal welfare claim
- In red meat, "barn-free" and "crate-free" will grow
- Multimedia will help companies show their dedication to animal welfare
- Transparency into treatment engenders consumer trust

IN FIVE YEARS AND BEYOND

- Mintel's perspective
- Expanding cellular agriculture and synthetic biology will make "animal-free" meat more accessible
- Lab-based meat draws on cells harvested from living animals
- It's early days, but interest in lab-grown meat will grow
- Younger Europeans will be receptive to lab-grown meat
 - Graph 4: lab/cultured/synthetic meat appeals to me, % agree, 2017
- It might not matter what can be called "meat"
- Canada's new guidelines don't differentiate between meat- and plant-based proteins
- Consumers aren't particular about their protein sources

KEY MARKET DATA

- Europe continues to lead global innovation in meat, poultry, fish, and meat alternatives
 - Graph 5: meat, poultry, fish, and meat substitutes, % product launches, by region, by subcategory, 2018
- Germany edges out UK and France to take second spot in meat and poultry introductions
- France takes the lead in meat alternative launches in 2018
 - Graph 6: meat substitute product launches, top five countries, 2018
- Top product claims vary by type of protein
 - Graph 7: meat, poultry, fish, and meat substitutes, new product launches, key claims, by subcategory, 2018
- US and France lead fish product introductions in 2018

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