



National Meat Case Study

Objective

The 2007 National Meat Case Study looked at the U.S. fresh meat case to identify trends and changes as well as areas of opportunity. Similar but less expansive audits were conducted in 2002 and 2004. The scope grew significantly in 2007 to answer two important questions:

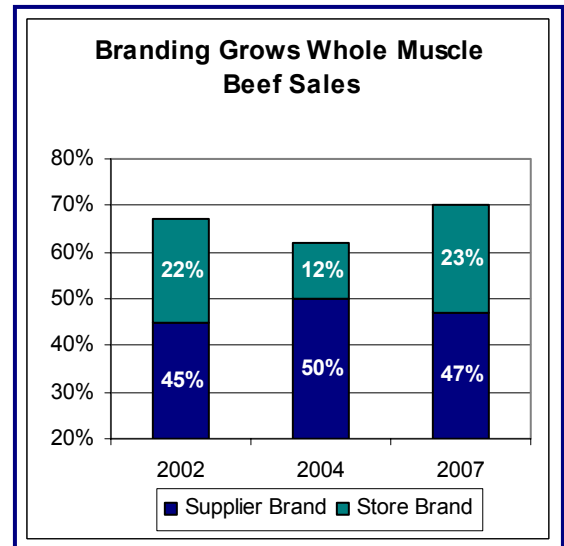
- What are retailers around the country merchandising in their fresh meat cases?
- How has this changed in recent years?

Methodology

The 2007 Audit looked at more than 164,000 total packages (315,000 pounds) in 48 key metro markets in 34 states. In addition, measurements were taken of the case space assigned to all the major proteins. Unlike the 2002 and 2004 audits, the 2007 audit increased the number of packages evaluated to include heat & serve, corned beef, smoked meats and club stores.

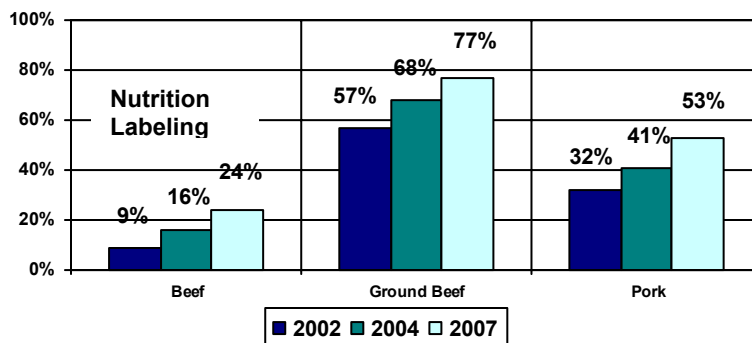
Major Insight

Case ready and branding continue to grow. Branded whole muscle beef packages represented 51 percent of the sample and 39 percent of ground beef packages. Case ready is growing at a slower pace representing 27 percent of whole muscle products (up 3 percent from 2004) and 67 percent of ground beef products (up 1 percent from 2004).



Key Learnings

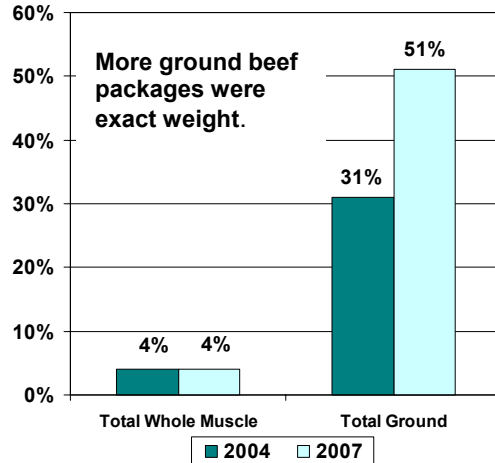
- Beef is maintaining a constant presence in the fresh meat case, with a slight increase in ground beef presence. Whole muscle beef occupies 49 linear feet and ground beef gained space, from 20 to 21 linear feet.
- Case ready product was more likely to be “in stock” than store wrapped packages.
- Natural beef still occupies a small percentage of total available space but has doubled for whole muscle beef to 4 percent.



- Nutritional labeling on packages expanded in each major category, while cooking instructions decreased.



- Ground beef is almost equal to whole muscle cuts as a percentage of meat case packages. Steaks declined from 42 percent to 39 percent of packages while ground beef packages increased from 31 percent to 36 percent.
- The trend towards consolidation in cuts offered continues to grow. Between 2002 and 2007, the top 15 steaks increased from 67 percent to 72 percent of offerings, and the top 15 roasts increased from 65 percent to 91 percent.
- There was a significant increase in net weight ground beef packaging.



Future Research Plans

This study was funded by The Beef Checkoff, the National Pork Board and Cryovac Food Packing Division of Sealed Air Corporation. This extensive audit of the nation's meat cases was benchmarked against the same study conducted in 2004. Periodic repeats of this study are warranted as the work provides valuable trend data to many segments of the industry.