

FOOD WITH A STORY

The North American
Meat Institute

APRIL 2016



AGENDA

MEAT MAKES THE MEAL

BUT, IT'S NOT WITHOUT ITS CHALLENGES

WHAT'S MEAT TO DO?



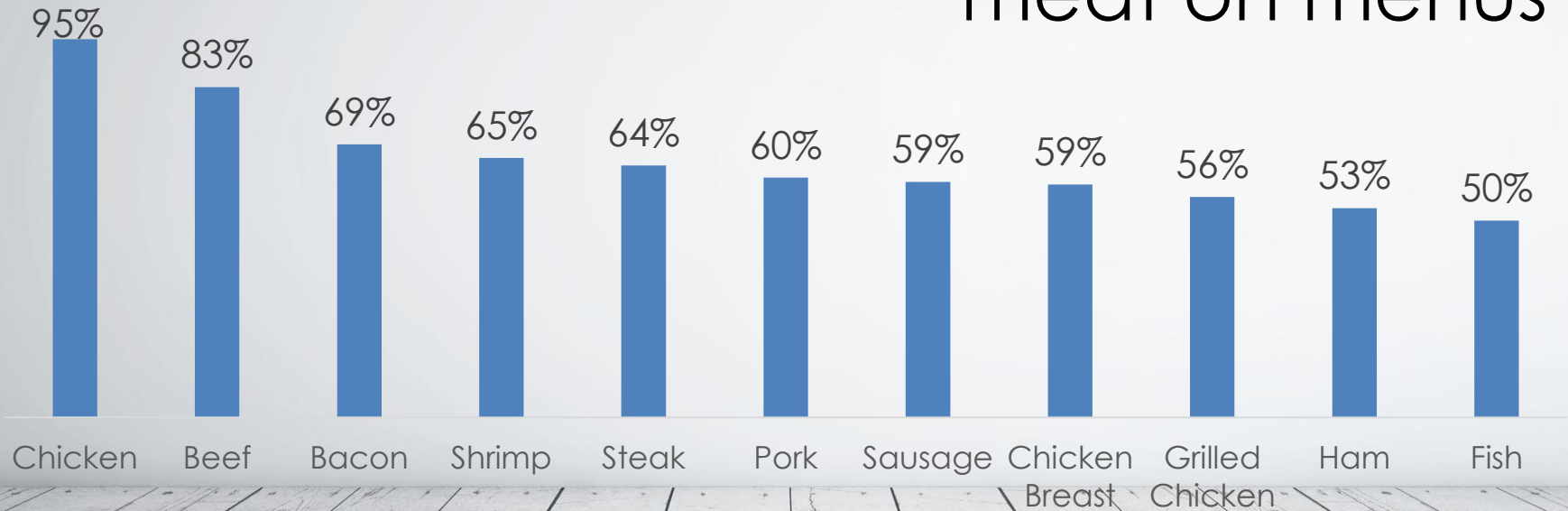
DATASSENTIAL
FOOD WITH A STORY

A white brick wall with a black rectangular sign in the center. The sign contains the text "MEAT MAKES THE MEAL" in white, uppercase, sans-serif font.

MEAT MAKES THE
MEAL

BON APPETIT

meat on menus



Source: Datassential's MenuTrends™



DATASSENTIAL

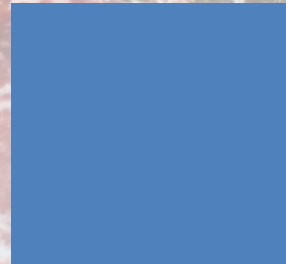
SCORES

Average Purchase Intent Percentiles

Meat*
64%



Noodle/Pasta
42%



*An aggregate of chicken, bacon, beef, sausage, steak, turkey, pork and ham

Average Purchase Intent Percentiles

Meat*
64%



Vegetables
40%



*An aggregate of chicken, bacon, beef, sausage, steak, turkey, pork and ham

A truly great burger starts with having...

65%

TRULY
GREAT

Meats / Poultry / Proteins

10%

TRULY
GREAT

Bread

9%

TRULY
GREAT

Toppings

9%

TRULY
GREAT

Cheese

7%

TRULY
GREAT

Sauces / Flavors

Source: Datassential's Burgers KEYNOTE™

Truly great BBQ starts with having...

41%

TRULY
GREAT

Meats / Proteins

21%

TRULY
GREAT

Sauce

21%

TRULY
GREAT

Authentic Prep Method

13%

TRULY
GREAT

Rub

5%

TRULY
GREAT

Sides

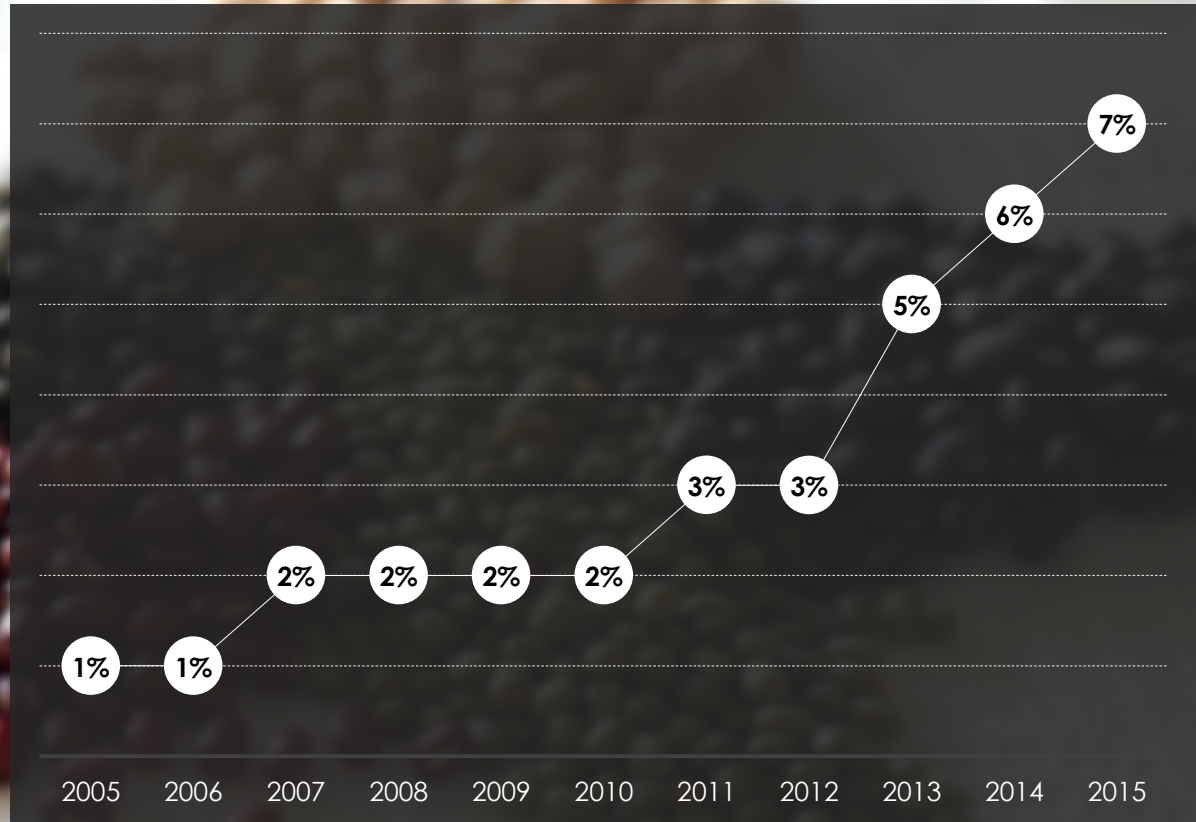
Source: Datassential's BBQ and Southern Foods KEYNOTE™

A black and white photograph of a brick wall. In the center, there is a black rectangular sign with white text. The text is arranged in three lines: "MEAT IS NOT", "WITHOUT ITS", and "CHALLENGES". The font is a clean, sans-serif typeface. The background is a light-colored brick wall with visible mortar lines. The bottom of the image shows a dark, flat surface, possibly a floor or a base.

MEAT IS NOT
WITHOUT ITS
CHALLENGES

VEGAN ON MENUS

Vegetarian claims have stayed stable at 35% of menus but vegan is on the rise.



PULSES





PULSES:

crops harvested for their dry seed

lentils

chickpeas

pinto beans

kidney beans

black-eyed peas

fava beans

protein

fiber

vitamins

amino acids



HEALTHY 1.0

WEIGHT MANAGEMENT

1980's to early 2000's

Low-fat
Low-calorie
Low-carb

HEALTHY 2.0

FEEL GOOD

early 2000's and beyond

Local
Natural
Organic

HEALTHY 3.0

FUNCTIONAL

early 2010's and beyond

Protein
Antioxidants
Superfoods



HEALTHY 3.0

FUNCTIONAL

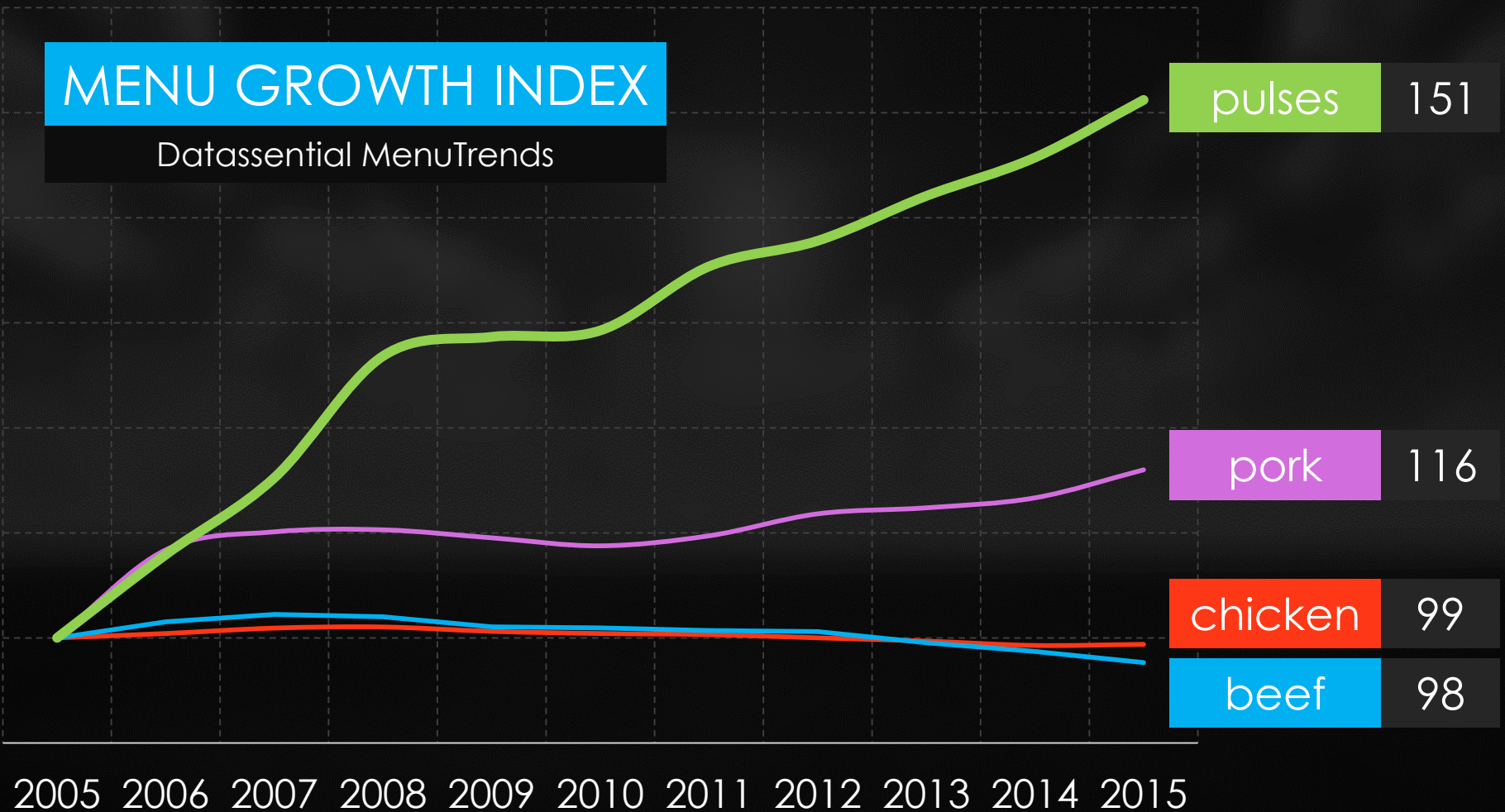
early 2010's and beyond

Protein
Antioxidants
Superfoods

PULSES

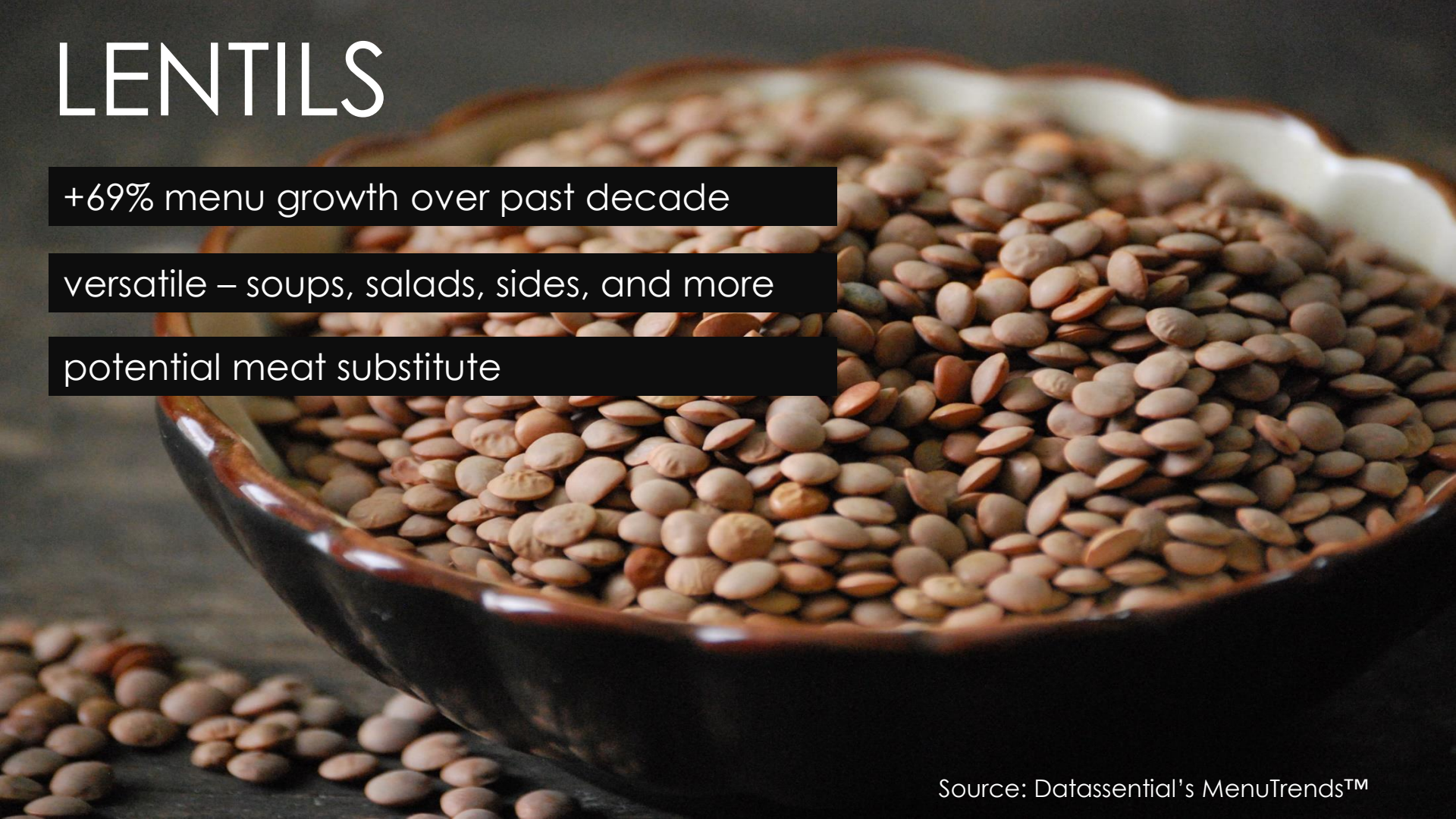
MENU GROWTH INDEX

Datassential MenuTrends



Source: Datassential's MenuTrends™

LENTILS

A close-up photograph of a dark brown ceramic bowl filled with dry, reddish-brown lentils. The lentils are scattered on a dark, textured surface around the base of the bowl. The lighting is soft, highlighting the texture of the lentils and the rim of the bowl.

+69% menu growth over past decade

versatile – soups, salads, sides, and more

potential meat substitute

CHICKPEAS



+290% menu growth over past decade

also a potential meat substitute

salads, falafel, hummus, and more

POTENTIAL FOR
BOREDOM

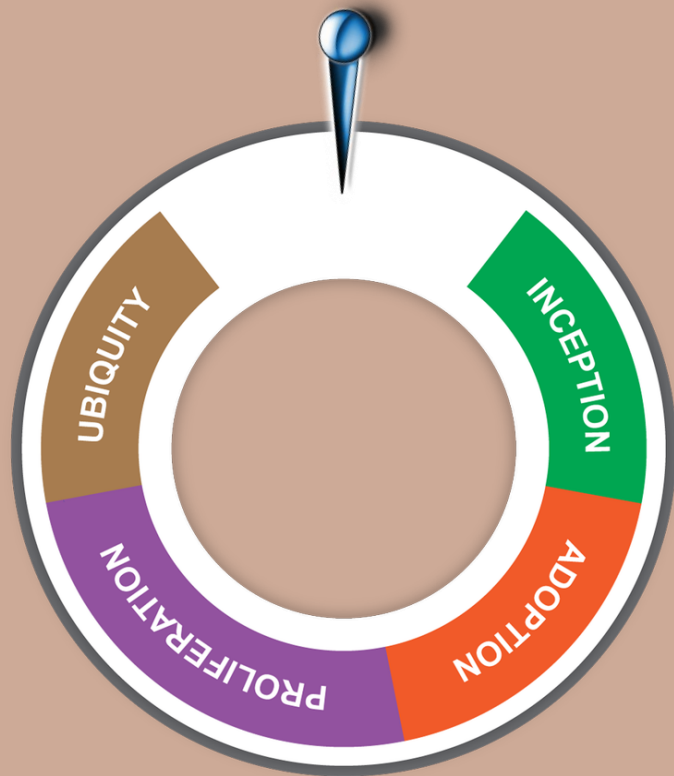
MAC

menu adoption cycle

trends are
predictable

MAC

menu
adoption
cycle



4 STAGES

Inception

Independent Ethnic
Fine Dining

Ubiquity

Midscale Restaurants
K-12
C-Stores

foods
prep methods
health terms
flavors
ingredients



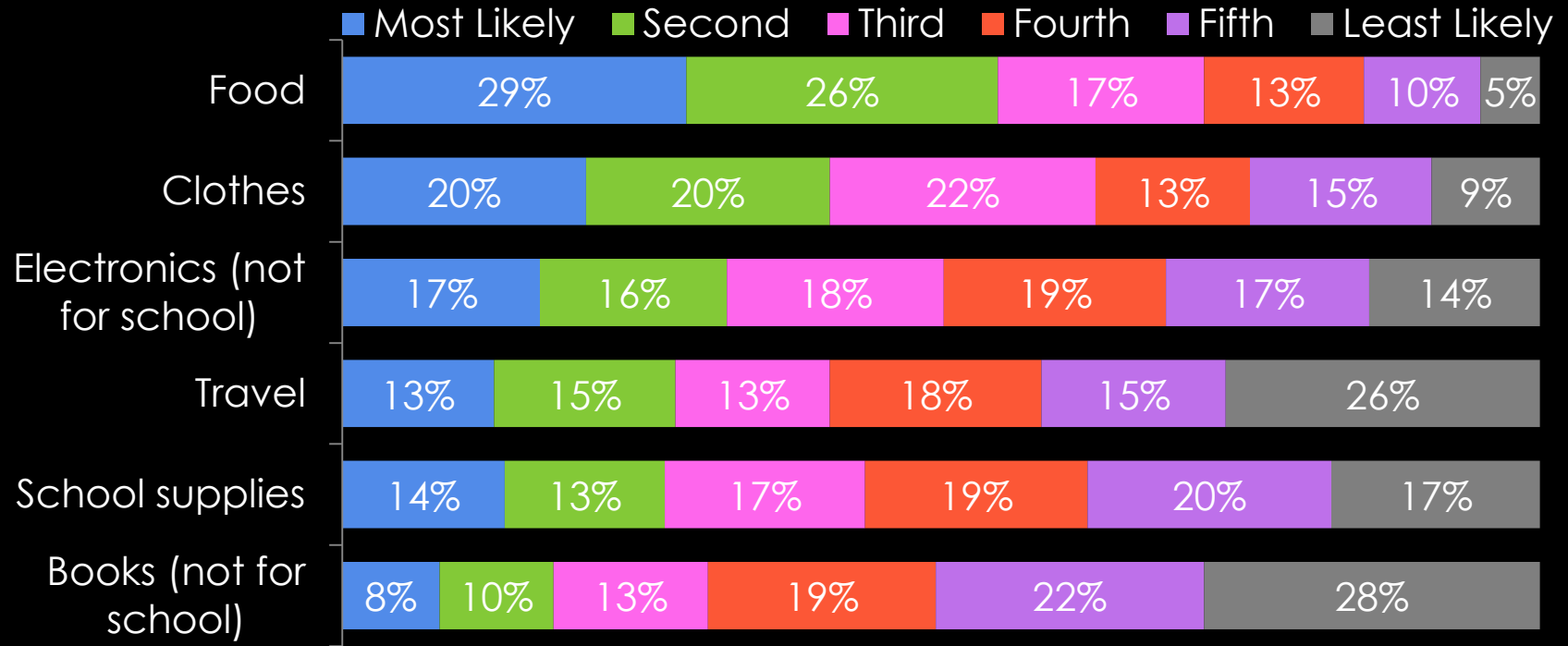
INCEPTION

ADOPTION

PROLIFERATION

UBIQUITY

On what would college students most likely spend a gift of money?



Source: Datassential's Colleges & Universities KEYNOTE™

EATER TYPES

11% of college students

vs.
19% of
population



Basic Eaters

*dispassionate
about food,
focusing more on
value and
convenience*

13% of college students

vs.
23% of
population



**Quality
Essentialists**

*quality matters to
a point; it's got to
be good, but
doesn't have to
be great*

30% of college students

vs.
28% of
population



Progressives

*passionate
about food and
health, and more
willing to try new
things*

46% of college students

vs.
29% of
population



Experientialists

*go beyond the
food to also
focus on the
experiential
aspects of eating
& drinking*

AMERICAN FOOD

59%

56%

50%

47%

Boomers

Gen X

Gen Y

Gen Z

Source: Datassential

SOUTHERN FOOD

40%

41%

37%

31%

Boomers

Gen X

Gen Y

Gen Z

Source: Datassential

KOREAN FOOD

8%

Boomers

19%

Gen X

20%

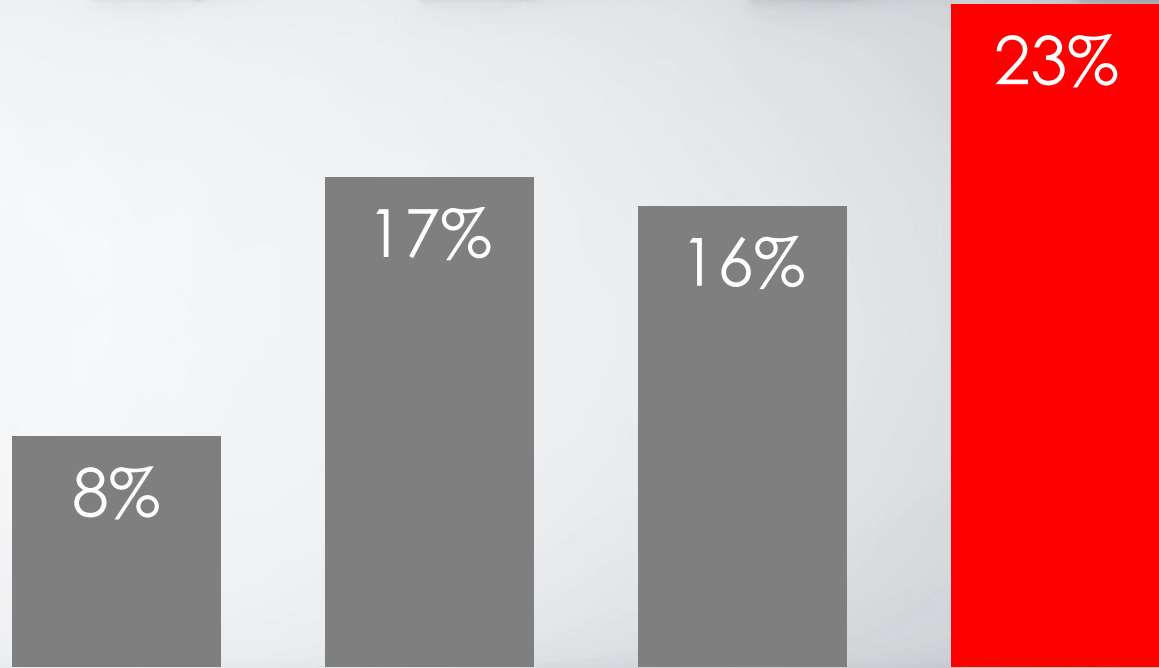
Gen Y

20%

Gen Z

Source: Datassential

Vietnamese Food



Boomers

Gen X

Gen Y

Gen Z

Source: Datassential

Indian Food

11%

Boomers

19%

Gen X

20%

Gen Y

25%

Gen Z

Source: Datassential

Boomers	Gen X	Gen Y	Gen Z
28% ethnic	38% ethnic	42% ethnic	47% ethnic





WHAT'S MEAT TO DO?

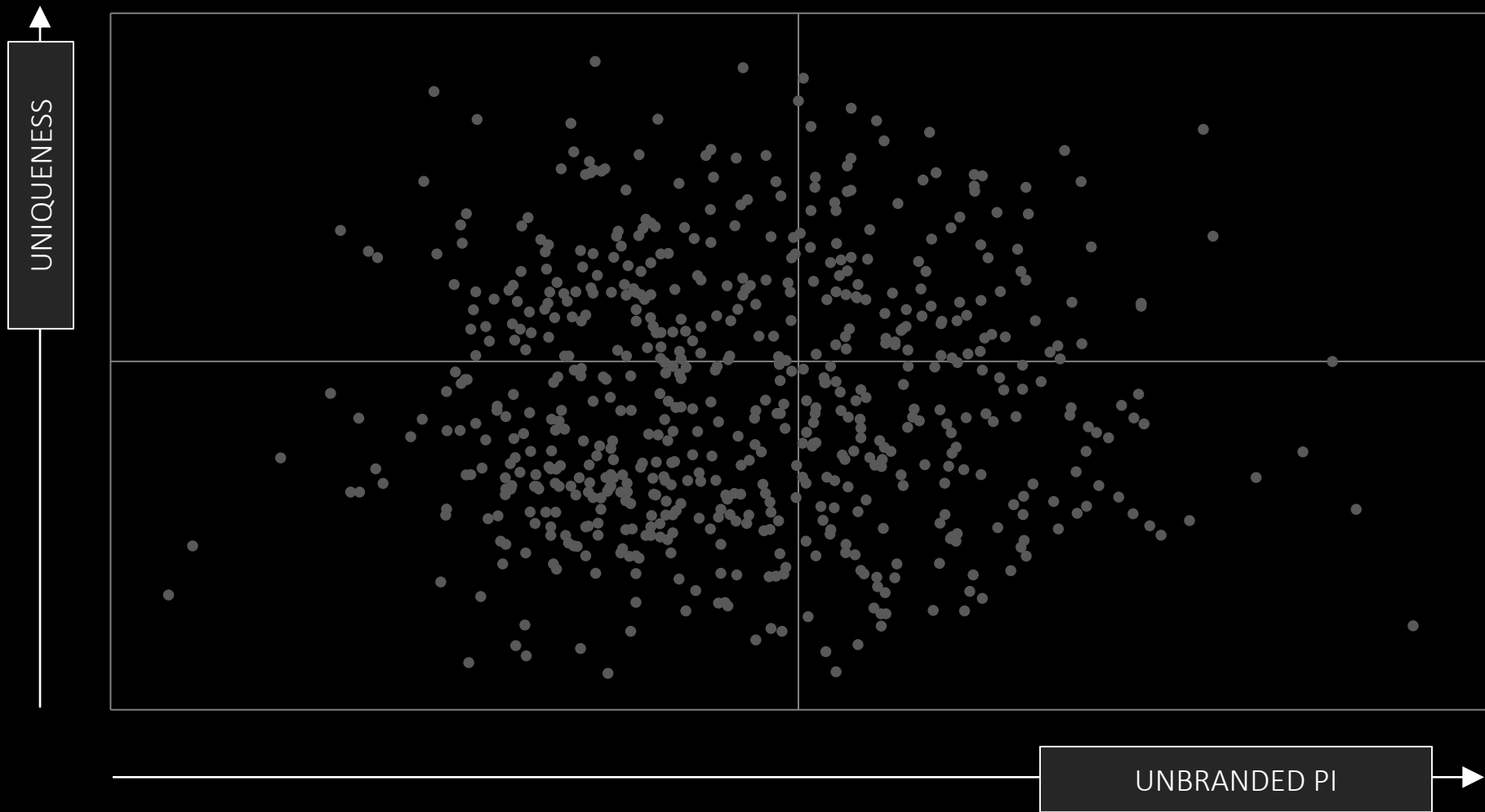
food with a story

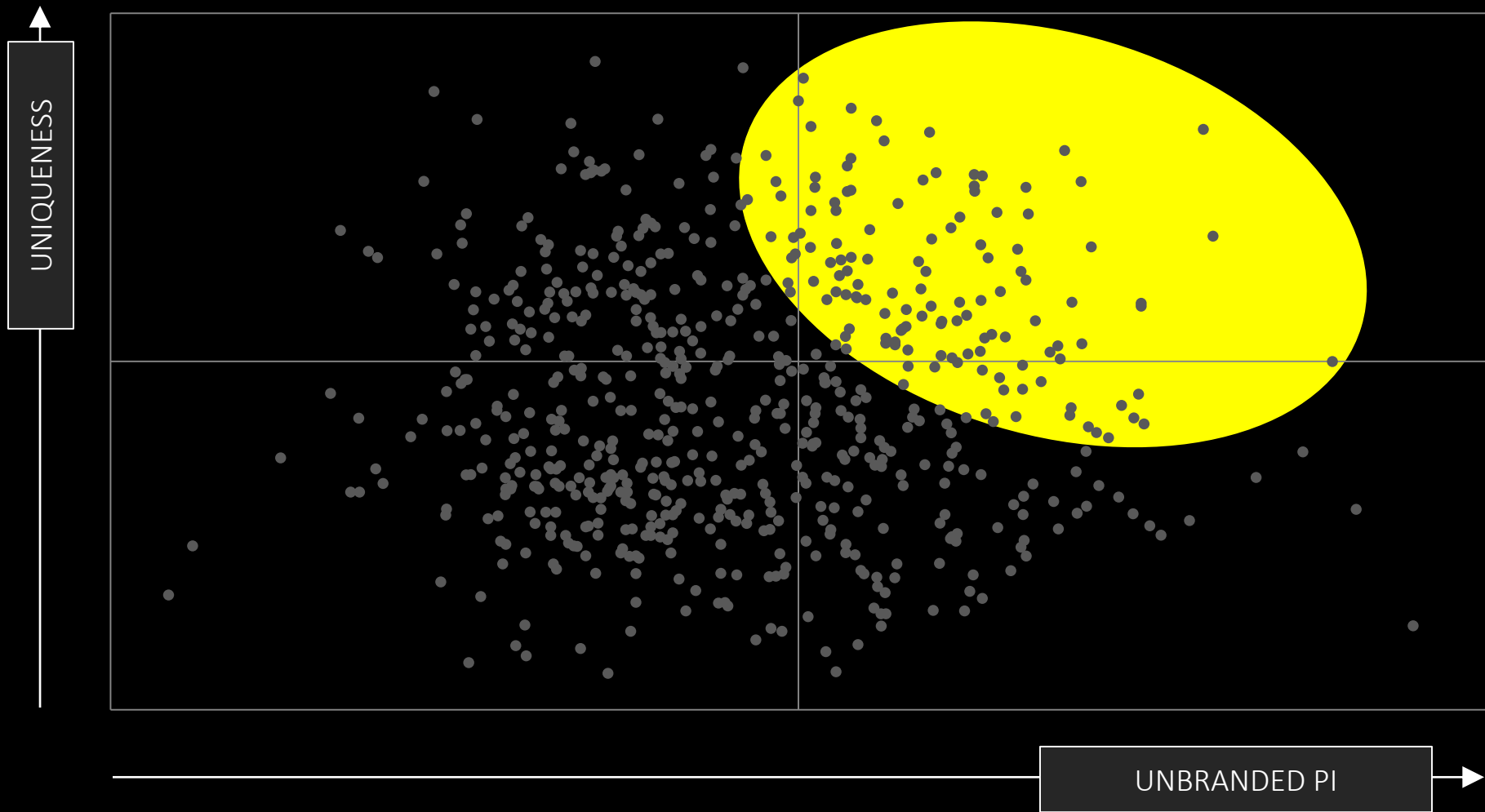




DATASENTENTIAL

SCORES









CAMPFIRE CHICKEN

Enjoy camp-style cooking over an open fire with a half chicken seasoned with Cracker Barrel® Campfire spice blend and slow roasted 'til tender with fresh carrots, corn on the cob, red skin potatoes, chopped onion, and tomato wedges. We cook and serve it in foil to seal in all the savory juices.

Purchase Intent	Liking	Uniqueness	Draw	Frequency	Value
100	99	98	100	99	91

Source: Datassential's SCORES™

“PIG FACE”



Here's a well-known item from
Chicago's Girl & The Goat.
Let's take a look at how it's made!





Size:	40g
Calories:	200
Fat Calories:	140
Total Fat:	15g



Size:	44g
Calories:	215
Fat Calories:	100
Total Fat:	11g

“These are delicious, and the healthiest snack today.”

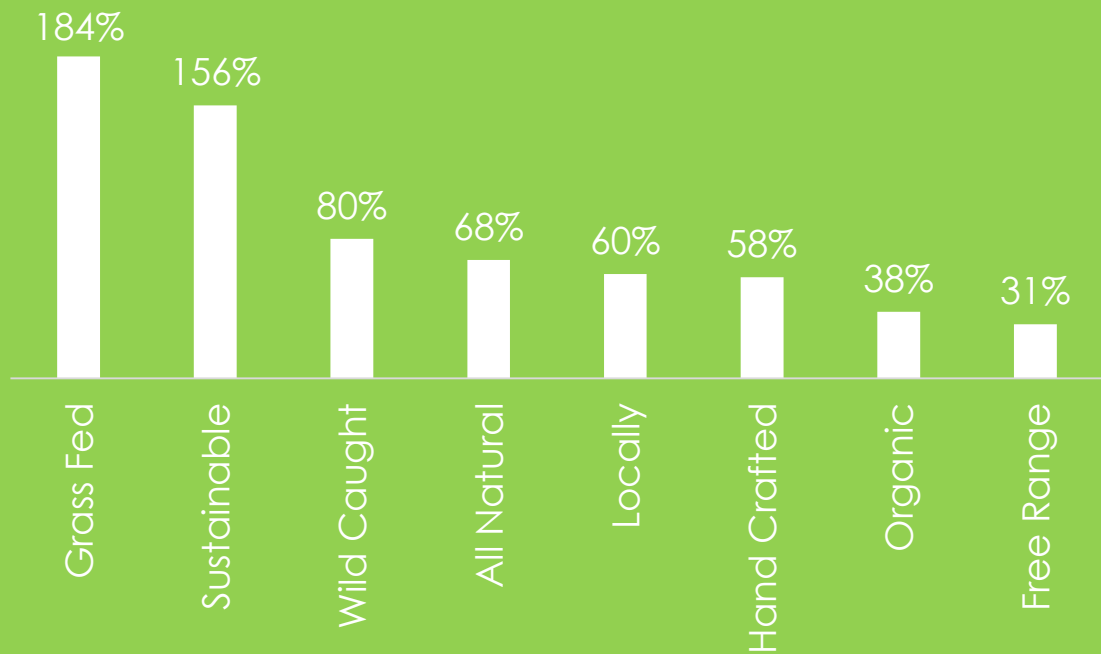
STORIES ABOUT...

the production

the potential

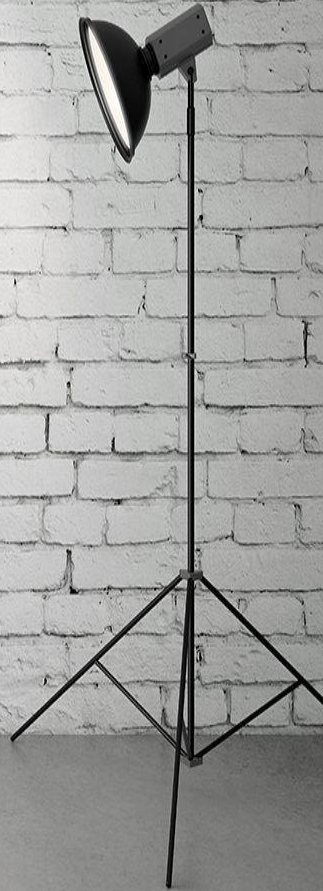
the powerful experience

THE DETAILS OF MEAL PRODUCTION ON MENUS



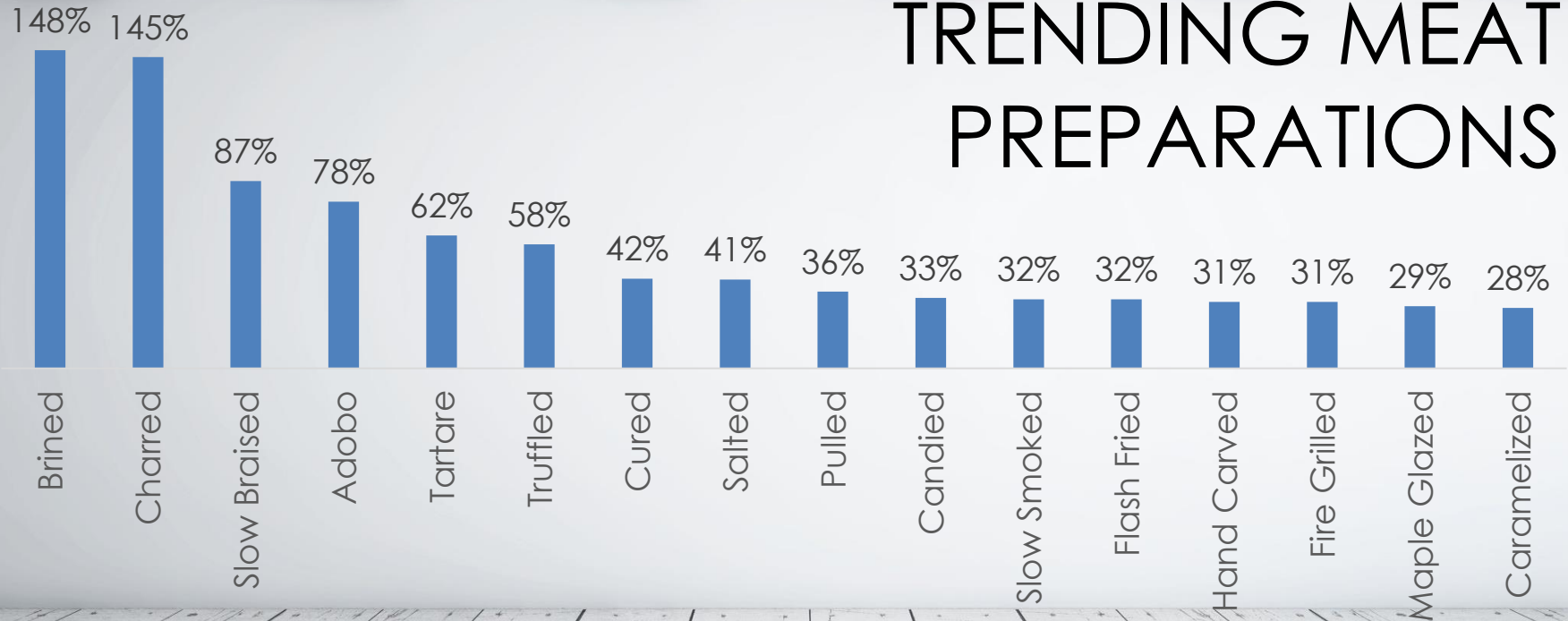
Tell a story about...

What wonderful things you
can do with the product



57% of raw meat is purchased with a specific preparation in mind

TRENDING MEAT PREPARATIONS





MEAT PIES

TORTAS



FLATBREADS





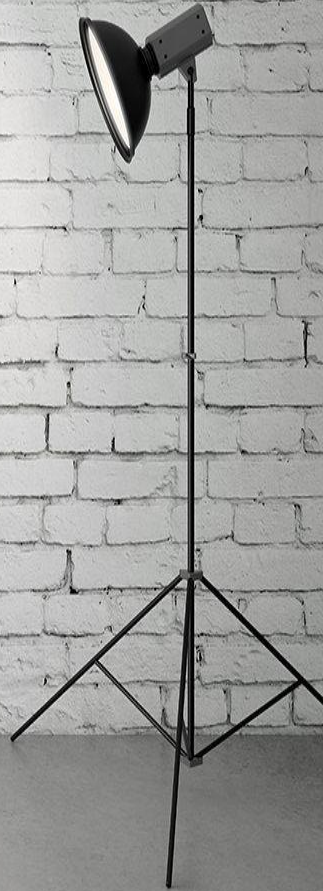
SCHNITZEL

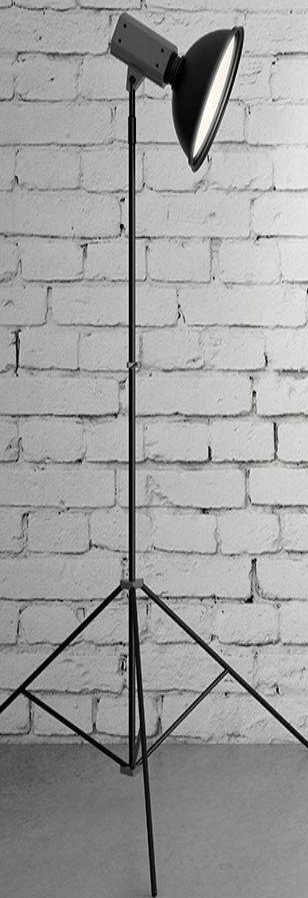
ETHNIC WINGS



Tell a story about...

the experience the
product will provide





national

regional

hyper local

beyond
true local flavor

A black studio light on a stand is positioned on the left side of the frame, casting light onto a white brick wall. The light has a silver-colored reflector and a black stand with three legs. The wall is made of white bricks with visible mortar lines. A black rectangular box is centered on the wall, containing the text "it's time to localize".

it's time to localize

CHICAGO

A nighttime photograph of the Chicago skyline, featuring numerous illuminated skyscrapers and buildings. The city lights are reflected in the calm water in the foreground, creating a symmetrical effect. The sky is dark with some light clouds.

high indexing foods

Italian Beef	1,670
Mostaccioli	908
Giardiniera	691

Source: Datassential's LOCAL™

ST. LOUIS

262 miles to Chicago

high indexing foods

Provel	12,406
Toasted Ravioli	11,452
Canneloni	772



Source: Datassential's LOCAL™

PHOENIX



high indexing foods

Green Chile	515
Prickly Pear	352
Machaca	292

Source: Datassential's LOCAL™

MIAMI

An aerial photograph of Miami Beach, showing the coastline from the ocean on the left to the city skyline on the right. The water is a vibrant turquoise, transitioning to a deeper blue further out. A wide, white sandy beach runs along the coast, with a few people visible. To the right of the beach is a strip of greenery with palm trees, followed by a dense line of high-rise apartment buildings and hotels. The city extends inland, with more buildings and green spaces visible under a bright blue sky with scattered white clouds.

high indexing foods

Churrasco	936
Conch	833
Key Lime Pie	296

Source: Datassential's LOCAL™

high indexing foods

SAN ANTONIO

Guisada	2,113
Chalupa	1,514
Shiner Bock	814



Source: Datassential's LOCAL™

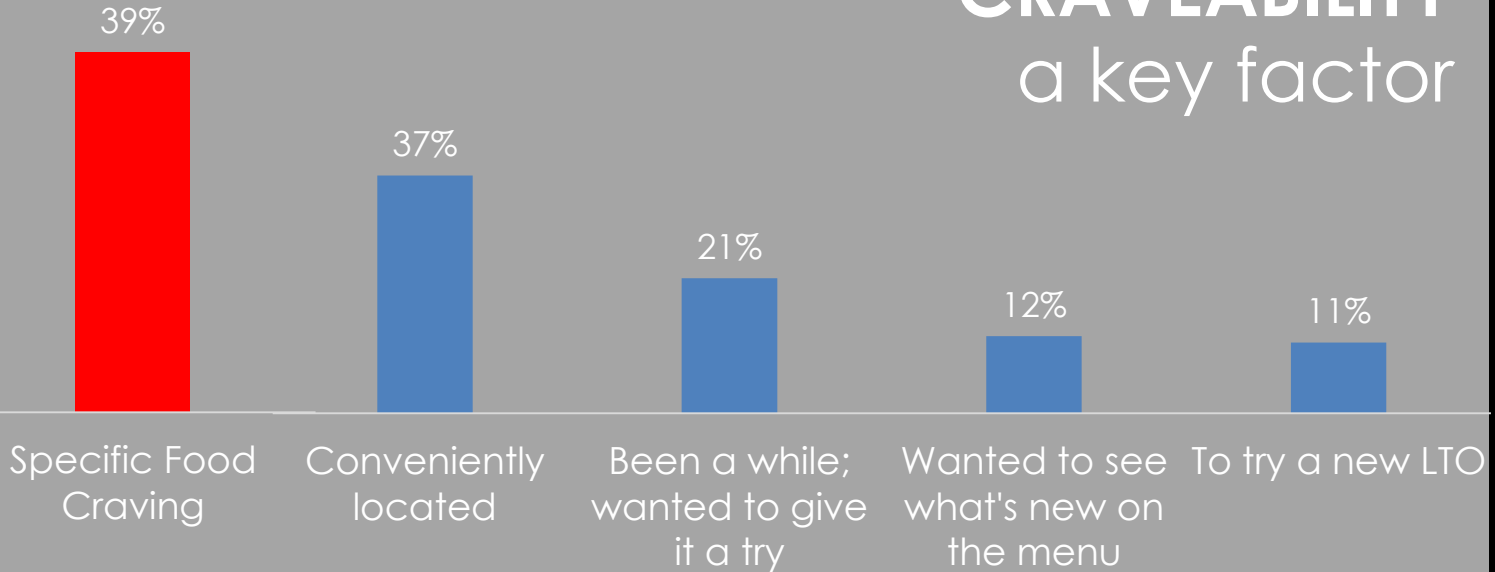


high indexing foods

Hot Chicken	982
Fried Green Tomatoes	463
Catfish	357

NASHVILLE

CRAVEABILITY a key factor





PERSONAL

food with
A STORY

Datassential Innovation

Datassential is a full-service research agency for the food industry. Over our history, we have developed several industry-leading resources including:

- **Datassential MenuTrends™** - the original, largest, and most accurate tracking service of its kind
- **Firefly™** - the most complete and accurate database of 1.3 million foodservice operators
- **SCORES™** - consumer ratings for every new item and LTO at major chains
- **Horizon™ Testing** – CPG concept screening to fill the long-term innovation pipeline



The Food Authority

Over 100 leading food manufacturers, retailers, and restaurant chains use Datassential for their insights needs.



... plus many more