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Retail Meat Case Survey-2015

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Objectives

Meat retail space throughout the US is an ever-changing area of the modern supermarket. The objective of this survey was to further investigate the retail trends of the fresh meat case across the US.

Materials and Methods

National and regional supermarkets and club stores (n = 114) were surveyed from April to August 2015. Two trained auditors visited each store between the hours of 9 AM and 7 PM, with the typical audit lasting 2 h. Retail self-service cases were evaluated for the percentage of space allocated to fresh meat of various species (whole muscle beef, ground beef, pork, veal, lamb, chicken, and turkey). Five regions were represented across the U.S.:: northeast (NE), southeast (SE), midwest (MW), southwest (SW), west coast (WC). The following traits were recorded for each stock keeping unit (SKU): Species, Region, Natural (NAT), Organic (ORG), Case Ready (CR), and packaging type. NAT, ORG, and CR were recorded as either yes or no, based on the presence of NAT or ORG labeling, or the presence of a USDA mark of inspection containing an establishment number indicating CR. Data were summarized using *R: A language and environment for statistical computing (version: "Fire Safety" 3.2.2).*

Results

Across the United States 15,136 SKU were evaluated. Thirty percent of SKU's was represented by beef, and chicken was the second most prevalent at 22%. The SW region had the highest percentage (34.4%) of beef in the case, while the MW had the lowest prevalence (28.3%) of beef. Chicken presence was very consistent across the MW, SE, and SW (22.3, 22.2, and 22.0%, respectively) with the NE higher at 25.0% and the WC on the lower end at 20.2%. Ground beef prevalence was more variable, with a range from 9.4% in the NE and 13.35 in the MW. There was nearly a 5% difference from the greatest pork presence in a region (SE, 24.7%) to the lowest (SW, 20.1%).

Natural labeling varied by species across the US. Over 50% of chicken and turkey SKU's were labeled as NAT (62.6 and 51.7%, respectively). The majority of beef, ground beef, and pork packaging did not carry a natural labeling claim (89.4, 67.6, and 77.2%, respectively). Organic labeling claims were much less prevalent than NAT. Of the species audited, ORG labeling was observed most often in chicken (7.8%), followed by ground beef (5.4%). Case ready was most common with poultry products, as 93% of chicken and 97.2% of turkey was CR. Ground beef was also commonly found packaged as CR (71.7%) The only species that had a majority of store packaged product was fresh beef cuts (64.0%).

Packaging type was another trait evaluated at all stores. PVC overwrap with a foam tray was the most common (42.2%) packaging type across the US. Most chicken (58.6%) was packaged in SSD/SES packages which contributed to 15.5% SKU's evaluated. Rollstock packaging was the third most used (12.3%) packaging type in the US. Rollstock was most commonly used for pork packaging rollstock (17%).

Conclusion

The data in this study in a small snapshot of retailers' stocking trends. Overall the data is suggesting that an increasing amount of meat in self-service retail cases is case ready. The level of organic products remain below 4% on average, but has still made substantial gains since the last audit. PVC overwrap still remains the preferred package by retailers, but varies by species. More research and education needs to be completed to improve the efficiency of this packaging type to help reduce product waste.