

Fresh meat and the need for convenience solutions

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In recent years the fresh meat industry has seen dramatic changes in the buying patterns of the major retailers throughout Europe

Large retailers wishing to reduce costs through logistical optimisation have primarily driven the trend within fresh meat.

The majority of the meat available in retailers today has been packed in a separate processing and distribution facility whereas in the past much of the meat on sale was packed in-store. The main reasons for this trend are lower costs through reducing waste through improved utilisation of the meat and longer shelf-life, and easier line management with retailers able to order only what they need on a daily basis.

The trend has been given additional drive and focus through consumer demand for improved hygiene and food safety. These consumer demands have been generated by the BSE and E. Coli contamination scares in the 1990s.

As an alternative to packing the meat in-store, retailers now buy the majority of their packaged meat directly from larger meat processors (known as centralised packing). This development has had an effect on the industry as a whole with meat processors becoming fewer but larger through acquisition. This development continues due to the high pressure on price from retailers. This price pressure has also affected packaging suppliers with increased demand for low cost and/or innovative Modified Atmosphere Packaging (MAP) solutions. Fresh meat packaging

The development towards centrally packed meat has also produced a demand for longer shelf-life and better on-the-shelf presentation. Top seal solutions have become the new buzzword within the packing of fresh meat since top sealed packs provide significantly longer shelf-life, an improved presentation to consumers and lower costs.

There are several MAP applications available in the market place; barrier display film, flow pack, form fill and seal (FFS), and of course top sealing. The main advantage of these MAP solutions compared to meat packed in store is of course longer shelf-life.

Top seal has become the preferred solution due to the improved exposure of the product, and this feel-good benefit for the consumer was reinforced with consumers aware of less packaging around the product.

Figure 1 illustrates the approximate movement from in-store packed meat, towards centrally packed MAP solutions. Innovation to differentiate

The fresh meat sector in Europe has seen limited growth and some fresh meat producers have identified the need for differentiation in order to maintain and gain market share. Differentiation has also been a means for meat processors to reduce price pressure from retailers by creating private label products. The packaging can help meat processors to diversify from their competitors and create a distinctive brand image that can be recognised and appreciated by consumers. Some meat processors have differentiated by using different colours and unique shapes for their products in order to make them easily identifiable by consumers. Ready-to-cook as a way of standing out

Another way of differentiating and appealing to the end consumer is to focus on ready-to-cook products in a product range (prepared, chilled and frozen food that needs no other preparation other than opening and heating, excluding complete ready meals). Ready-to-cook is not a new concept for retailers or smaller butchers. However, it is a fairly new concept for larger meat processors. As a consequence of the development within MAP packaging, fresh meat processors can provide these ready-to-cook products directly to the end consumer. The UK in particular has shown a rapid development in ready-to-cook products. The turnover value of ready-to-cook products has doubled within the last five years and this growth rate is expected to continue not only in the UK, but also in other countries throughout Europe. New convenience consumers and higher profits

Following the UK ready meal industry, Europe is currently experiencing a large growth in the area of ready meals. Consumers who do not require complete ready meal solutions have been found to favour ready-to-cook products. Ready-to-cook solutions especially appeal to consumers who wish to take an active part in either the preparation or cooking process, and remain reluctant to purchase a complete ready meal solution. The consumers choose the components of a meal by purchasing, for example, some marinated meat that is placed directly in the oven, often combining this with a prepared salad, prepared jacket potato, garlic bread and a ready-to-heat sauce. This ready-to-cook, ready-to-heat, and part- or fully-prepared component availability provides the consumer with multiple variations to combine and create their own meal.

The consumer's conscience is alleviated since they are actively participating in selecting the meal components, and part-

preparing and combining them to create a complete meal. In comparison to regular fresh meat products, ready-to-cook products enable meat processors to sell quality value-added products at premium prices, enhancing their turnover and earnings in a highly competitive slow-growth-market. Choice of packaging for ready-to-cook

For packaging suppliers, ready-to-cook products open new opportunities for value-added packaging. Traditionally, ready-to-cook products have been packed in aluminium foil or ordinary PS trays but the availability of dual-ovenable trays has increased use of CPET trays for these products. Dual-ovenable CPET also provides meat processors with various options of colour, shape and surfaces, providing excellent product presentation to consumers and differentiating their products from those of their competitors. CPET trays provide an additional advantage for producers of ready-to-cook products by being suitable for home freezing, and being heated in the oven straight from the freezer. This added convenience for the consumer avoids the need to decant the product from the pack into an oven-proof dish for cooking. At a minor increase in cost compared to ordinary PS trays, dual-ovenable CPET trays can offer significant benefits to ready to cook products. Compared to conventional packaging, CPET trays provide improved product exposure and more convenience, as they generate no washing up. CPET trays can even be taken direct from the oven and served from as a form of tableware.

It is expected that CPET, the preferred packaging material within ready meals, will also become the preferred packaging material for ready-to-cook products.

Although the convenience concept is mentioned in almost all food-related articles and may be wearing a little thin, it is an undisputed fact that consumers demand added convenience and are willing to pay a premium for it. Many meat processors and retailers have already realised that packaging itself can provide convenience through innovation and are working with manufacturers in the development of their ideas and processes.