

Hot Dogs and Sausages Market - Forecasts from 2020 to 2025

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Abstracts

The hot dogs and sausages market are expected to grow at a compound annual growth rate of 4.08% over the forecast period to reach a market size of US\$96.405 billion in 2025 from US\$75.839 billion in 2019. The rate at which urbanization is taking place which in turn is buttressed by globalization and rural to urban migration is facilitating the adoption of new consumption trends which have accommodated the inclusion of sausages and hotdogs among others. As of 2018, North America was the most urbanized region of the world, wherein the urban areas constituted 82% of the total population. This was followed by 81% of the population of Latin American and Caribbean which are concentrated in urban settlements and 74 % of the population of Europe that is concentrated in urban settlements. Additionally, the share of the world population living in urban areas is expected to reach 60% in 2030 from 55% in 2018. Besides, as of 2018, Africa and Asia represented the lowest levels of urbanization, however by 2030, urban settlements are projected to support 47 % of the population in Africa, 56 % in Asia, and 71 % in Oceania. Further, the urban population of Africa is projected to triple by 2050. In the case of Asia, an increase of 61 % is expected. Thus, most of the world's urban population will be concentrated in Asia (52 %) and Africa (21%) by 2050 [Source: UN].

According to OECD-FAO AGRICULTURAL OUTLOOK 2020-2029, a rise in consumption of meat is estimated among the consumers of developing regions due to high levels of population and high rates of growth. As a result, overall growth in meat consumption volume in the aforementioned region is anticipated to increase by five times that of developed countries. This estimation is reportedly relevant to Asia and Africa where growth rates are anticipated to be higher over the projected period in comparison with the preceding decade. Moreover, with the ratification of the African Continental Free Trade Agreement, the flow of trade within the African continent is

expected to positively impact and augmented during to the increased in consumption which would stem from lower prices. Besides the high growth rate of the population suggests that the growth of total consumption will be swifter in comparison with any other region irrespective of fluctuation in gains in per capita income. The trend of meat consumption Asia will be supported by the increased availability of pork meat with the anticipated abatement of African Swine Fever (ASF) and normalization of pork production. Additionally, declining meat prices, availability of disposable income, and trade liberalization are further expected to reinforce the growth of meat consumption. Lower prices have also resulted in poultry being the preferred choice of meat for consumers in developing countries. An increase in consumption of poultry meat is estimated to increase globally to 145 Mt during the next few years, accounting for 50% of the additional meat consumed. The national diets of China and India are known to comprise poultry meat.

An increase in consumption of pig meat is estimated to increase globally to 127 Mt during the next few years, accounting for 28%% of the total increase in meat consumption. In developing countries, per capita consumption of pig meat, which is reportedly half of that in developed countries, is anticipated to increase marginally over the projection period. Moreover with per capita consumption of pig meat that has grown rapidly which has been facilitated by favorable prices the growth rates of pig meat are expected to be sustained by most Latin America along with poultry to meet the rising demand from the middle class. Additionally, consumption is projected to increase to 76 Mt over the next ten years and to account for 16% of the total increase in meat consumption compared to the base period. Despite a low base, Asia is the only region where it is projected to increase its per capita beef consumption. Conversely, the food expenditures per individual in developed countries are gradually directed toward convenience food and eating-out than the erstwhile purchase of fresh produce meant for home cooking. For example, in April 2019 it was reported that Chinese pork processor Jinluo has been targeting China's health-conscious urbanites with several new ranges of heat-treated sausage snacks. Moreover, Cherkizovo Group (LSE: CHE, MCX: GCHE) which claims to be Russia's largest consumer-centric manufacturer of meat products which earlier in 2018 as part of its growth plans has established a fully automated smoked sausage factory sausage in Kashira, has reportedly in October 2019 has invested in a comprehensive rebranding of across more than 300 products categories pertaining to sausages, among others. This strategic initiative includes the improvement of recipes of its sausages, among others, the removal of non-performing products as well as enhancement of product appearance.

While products made with meat-based ingredients are promising for the hotdog and

sausage market the recent developments of plant-based alternatives are expected to drive the growth of the hotdog and sausage market to a new echelon. This stems from the fact that veganism and flexitarian eat habits are no more restricted to a fringe group. They are being increasingly adopted as a result of changing lifestyles rather than as an outcome of self-imposed dietary restriction. To substantiate the aforesaid certain recent market developments in the plant-based alternative space are being listed below:

September 2019 – Product Launch

The manufactures of Richmond Sausage, Kerry Group plc (ISEQ: KRZ, LSE: KYGA) had reportedly launched a meat-free variant of the same range, which have been made out of protein derived of soy, called The Richmond Meat-Free Sausages

December 2019 – Product Launch

Path-breaking British innovators Moving Mountains which is known for its planter-based innovations, reportedly expanded its product portfolio by making fully plant-based sausage commercially available through Jan Zandbergen BV to the retail and foodservice in Europe. With the addition of pepper and nutmeg to impart authentic flavors this product is made out of all-natural ingredients that include beetroot ad mushroom.

January 2020 – Planned Product Launch

It was reported that Nestl? would be launching a plant-based product in Europe and the US that is identical to like a sausage, called Garden Gourmet Incredible Sausage that is made out of soy and would be made commercially available in Bratwurst and Chorizo style (for a select few European countries) and Sweet Earth Sausage that is based on pea protein and called Sweet Earth Sausage would be made commercially available in three varieties called Asian Ginger Scallion, Chik'n Apple and Habanero Cheddar for the US markets.

March 2020 – Product Launch

Baicaowei which is a snack company based out of China and owned by PepsiCo had reportedly launched a plant-based sausage that is made out of non-GMO soybeans and twice distilled Konjac powder which at the final stage of production is smoked with applewood. The entire method is claimed to be unique among those employed for making vegetarian meats in China

September 2020 – Product launch

Heck which is a British sausage brand has reportedly expanded its range of vegan products with plant-based variants of its most popular sausages Heck's Chicken Italia called Vegan Italia that reportedly contains vegan mozzarella and tomato, whereas the plant-based variant for Pork & Apple sausages is named Meat-Free with Apple. Both variants are made with protein derived from peas.

Segmentation

By Farming Type

Conventional

Organic

Others

By Ingredient Type

Beef

Chicken

Pork

Others

By Product Type

Cooked

Dried

Fresh

Smoked

Others

By Packaging Type

Boxes

Flow Pack

Jars

Others

By Distribution Channel

Online

Offline

By geography

North America

USA

Canada

Mexico

South America

Brazil

Argentina

Others

Europe

Germany

Spain

United Kingdom

Italy

France

Others

Middle East and Africa

UAE

South Africa

Others

Asia Pacific

China

Japan

Australia

India

Others

Note: The report will be dispatched withing 2-3 business days.

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