

THE NATIONAL
PROVISIONER
THE AUTHORITY ON THE BUSINESS OF MEAT AND POULTRY PROCESSING

2011 Sausage Processing Study

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Study Overview

BACKGROUND

BNP Media's Market Research Division, in conjunction with *The National Provisioner* magazine has conducted a Sausage Processing Study in order to provide information on the trends and strategies in sausage processing. An article on the Sausage Processing Study will be included in the June 2011 issue.

PURPOSE AND OBJECTIVES

The purpose of the Sausage Processing Study is to identify the methods and innovations within the industry.

Specifically, this research seeks to identify:

- Distribution and channels of sausage products
- Trends with “healthier” sausages and product type
- Importance of purchasing factors for sausage equipment and products
- Importance of purchasing factors for sausage suppliers
- Demographics of industry professionals

Study Overview

STUDY DETAILS

Target Audience: A total of 7,707 active, qualified *The National Provisioner* subscribers with e-mail addresses on file

Sample Selection Method: Systematic random sample from the domestic circulation (on an Nth name basis)

Survey Method: Web-based

Incentive: One \$100 American Express gift check was given to one randomly selected respondent from those that completed the survey

Fielding Dates: March 11 – 28, 2011

Completed Returns Summary:

	Number E-Mailed/ Mailed	Opted-Out/ Undeliverable	Usable Base	Usable Returns	Response Rate
E-Mail	7,707	182	7,525	69	1%

DATA TABULATION AND PRESENTATION

Upon receipt at BNP Media, the questionnaires are reviewed and processed into a computer database. Tabulations are generated using SPSS, a statistical software package.

The data produced by SPSS is presented in graphical and tabular format with the number of respondents who answered each particular question. This number may change throughout the report since some respondents may skip or incorrectly answer a question.

Some questions in this survey requested respondents to type in a response. Other than minor editing for readability, these responses are presented as written by the respondent.

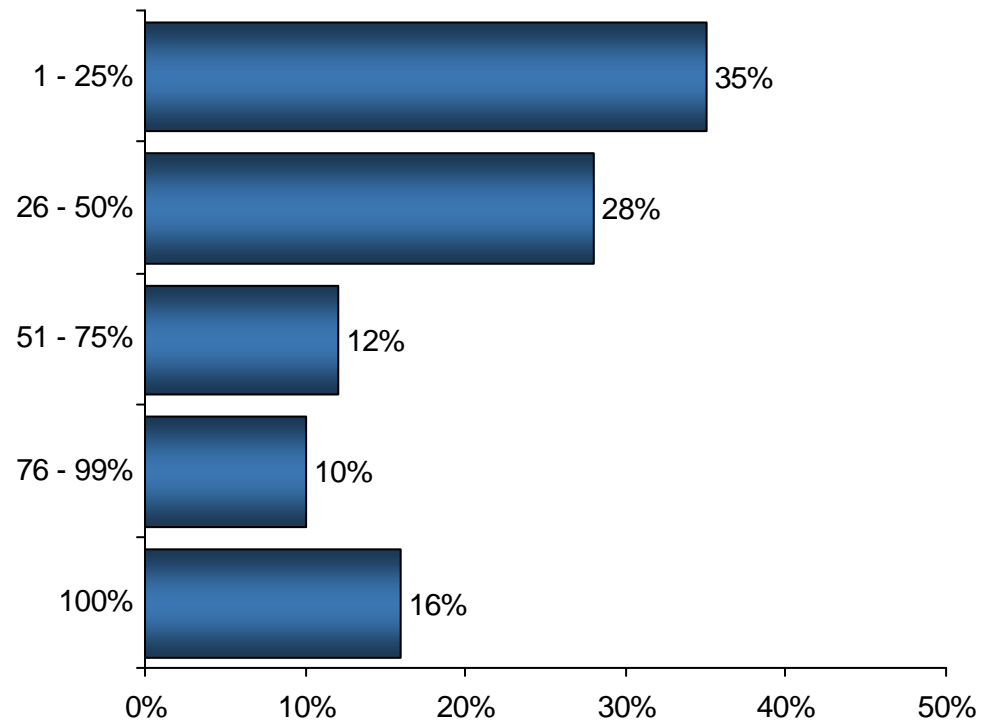


Study Results



Company Sales Exclusive to Sausage Products

2. What percentage of your company's sales is tied exclusively to sausage products?

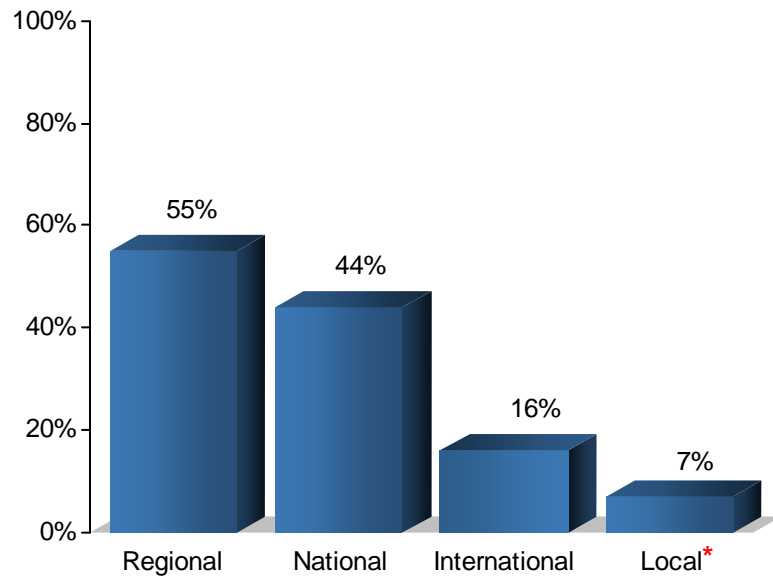


Total Respondents = 69

Note: Total may not equal 100% due to rounding

Geographic Area/Channel of Sausage Products Distribution

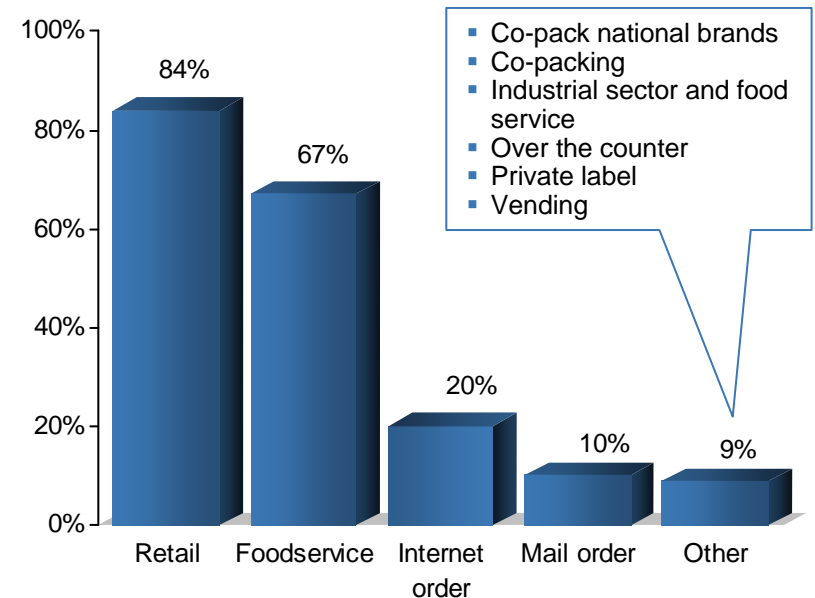
3. Which of the following represents the distribution of your company's sausage products? (Multiple response allowed)



Total Respondents = 69

* "Local" responses were taken from the "Other Mentions"

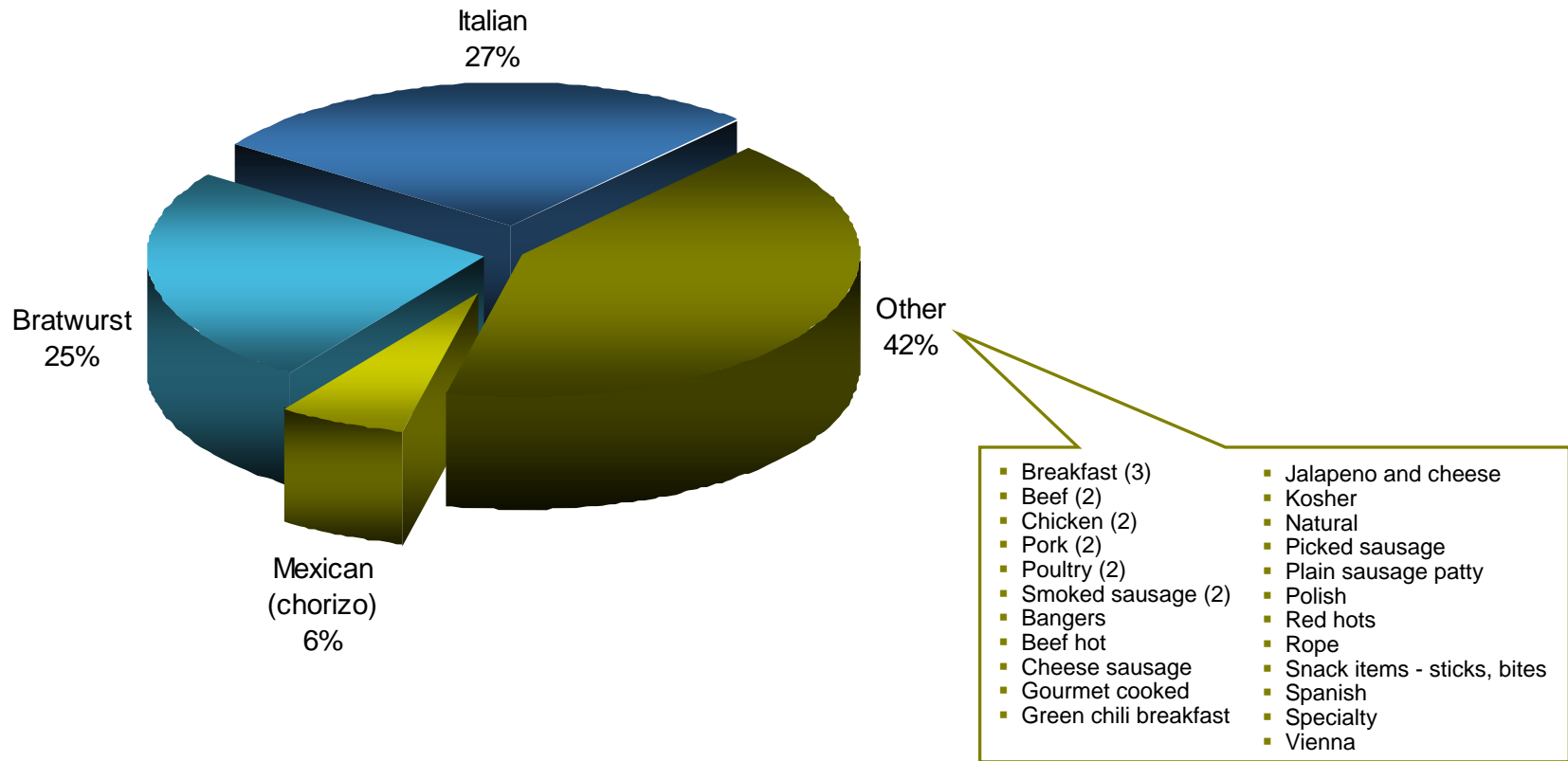
4. In which channels are your sausage products distributed? (Multiple response allowed)



Total Respondents = 69

Fastest-Growing Type of Sausage

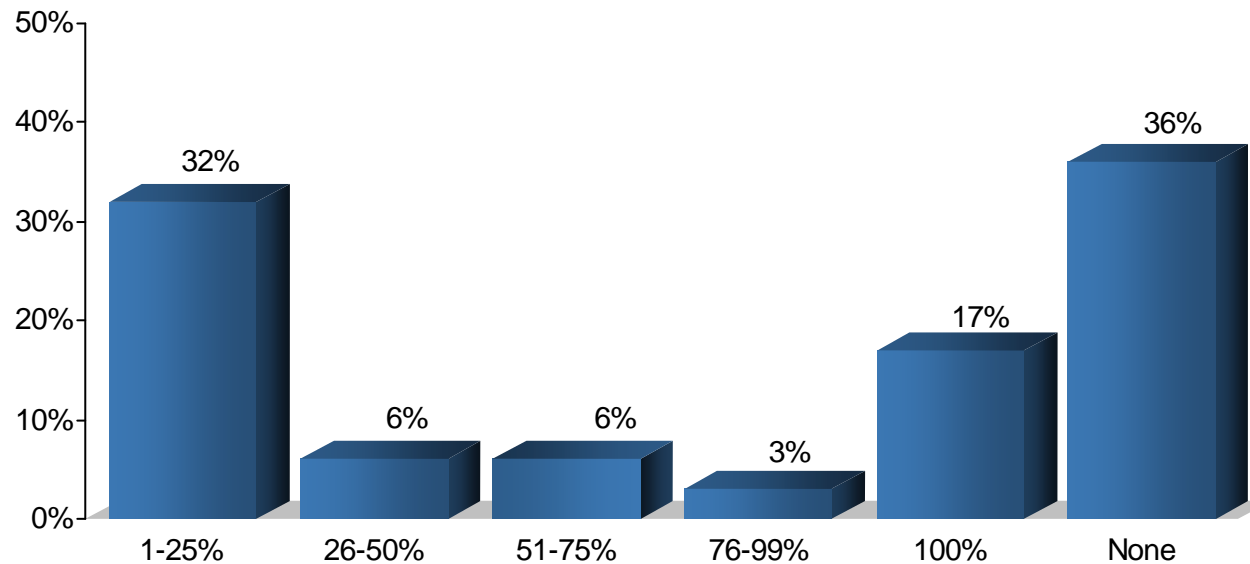
5. What is your fastest-growing type of sausage (not necessarily best-selling)?



Total Respondents = 69

All-Natural or Organic Sausage Products

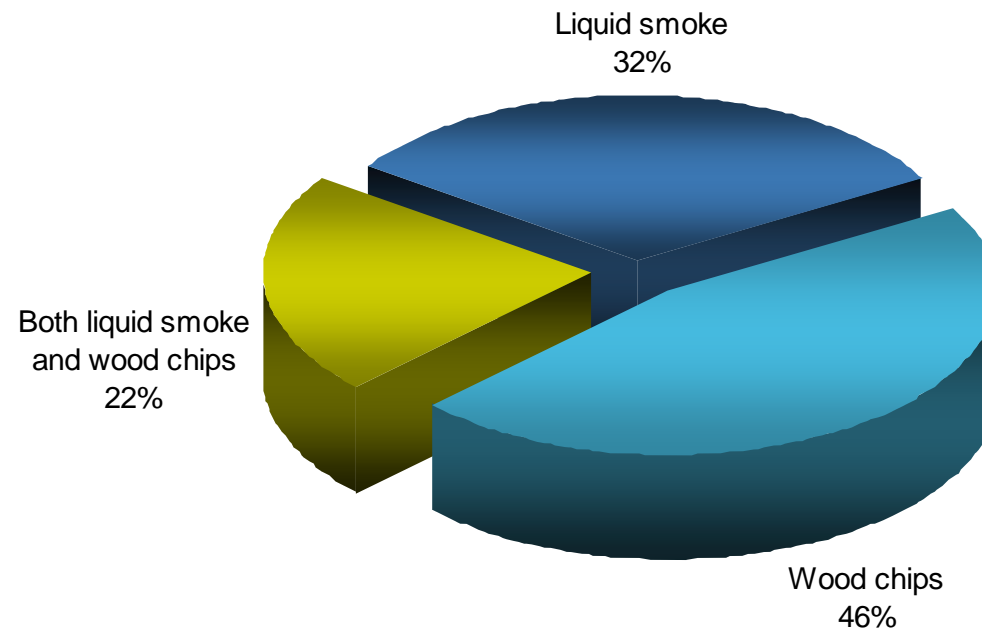
6. What percentage of your sausage products is either all-natural or organic?



Total Respondents = 69

Smokehouse Products

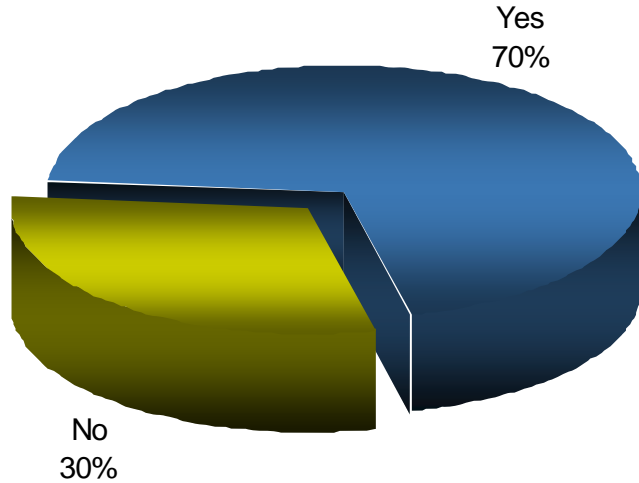
7. Which product(s) do you use in your smokehouses?



Total Respondents = 69

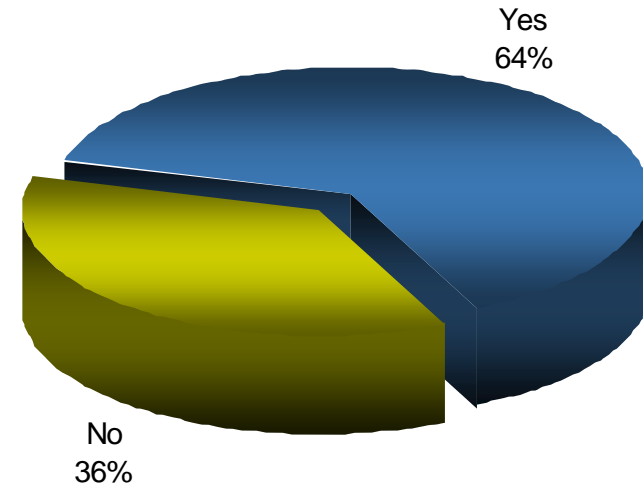
Healthier Sausage Demand/Formulation Alterations

8. Have you seen a demand for “healthier” sausages (reduced salt, reduced nitrites/nitrates, etc.)?



Total Respondents = 69

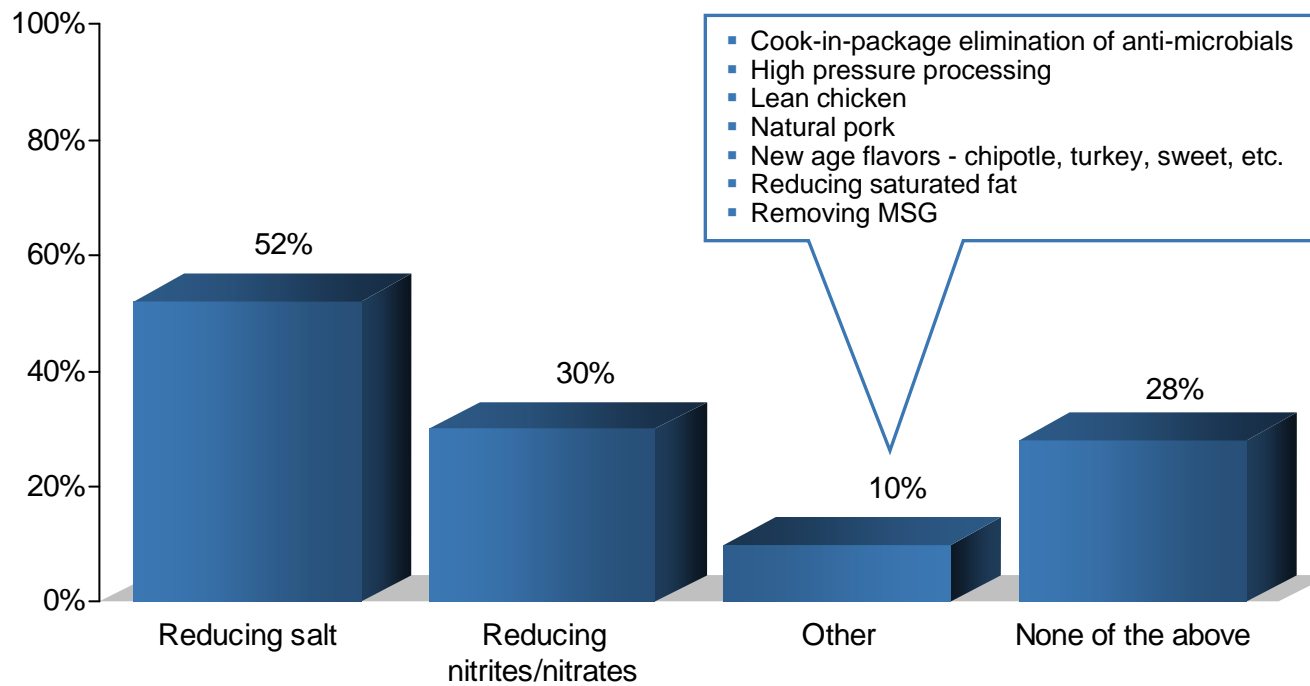
10. Have you altered any of your formulations to meet the demand for “healthier” sausages?



Total Respondents = 69

Priority Trends for R&D Teams

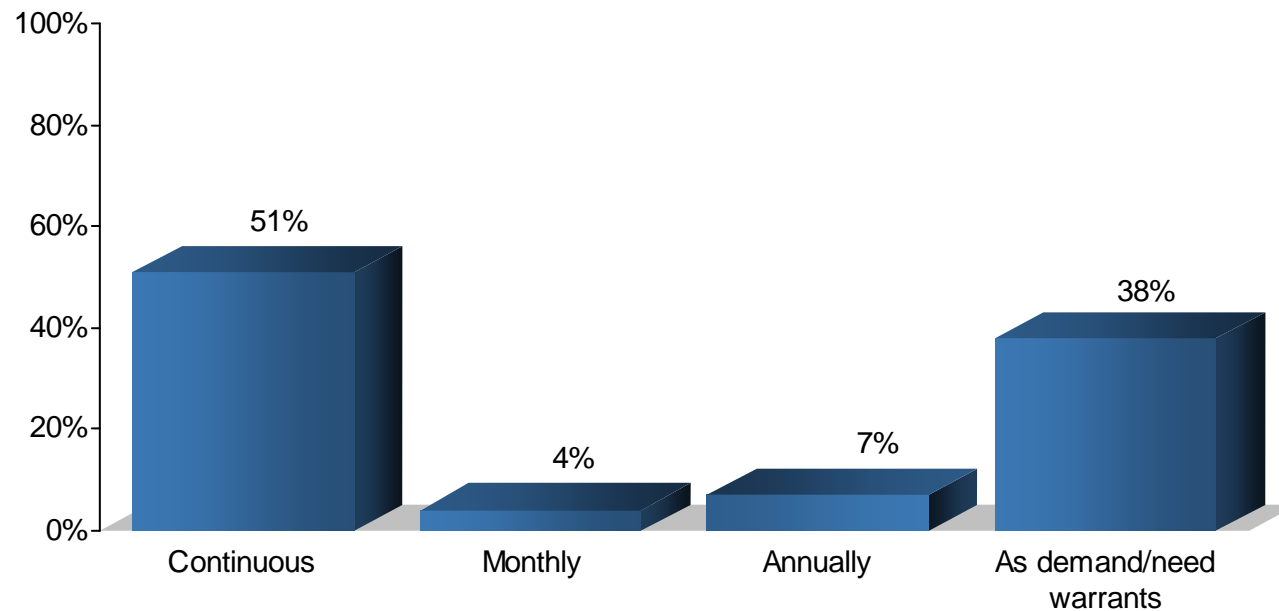
9. Which, if any, trends have become a priority for your company's sausage R&D teams? (Multiple response allowed)



Total Respondents = 69

Frequency of Assessing Formulations/Process Efficiencies

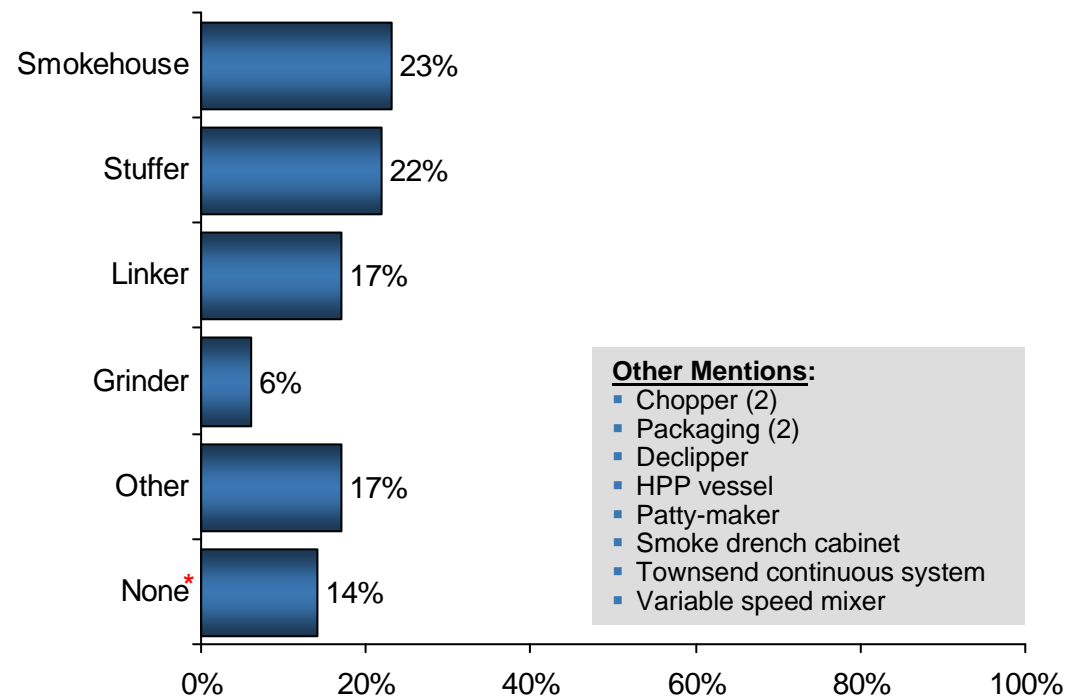
11. How frequently do you formally assess your formulations and process efficiencies for sausages?



Total Respondents = 69

Sausage-Processing Equipment Purchase Plans

12. What is the next piece of sausage-processing equipment you plan on purchasing?



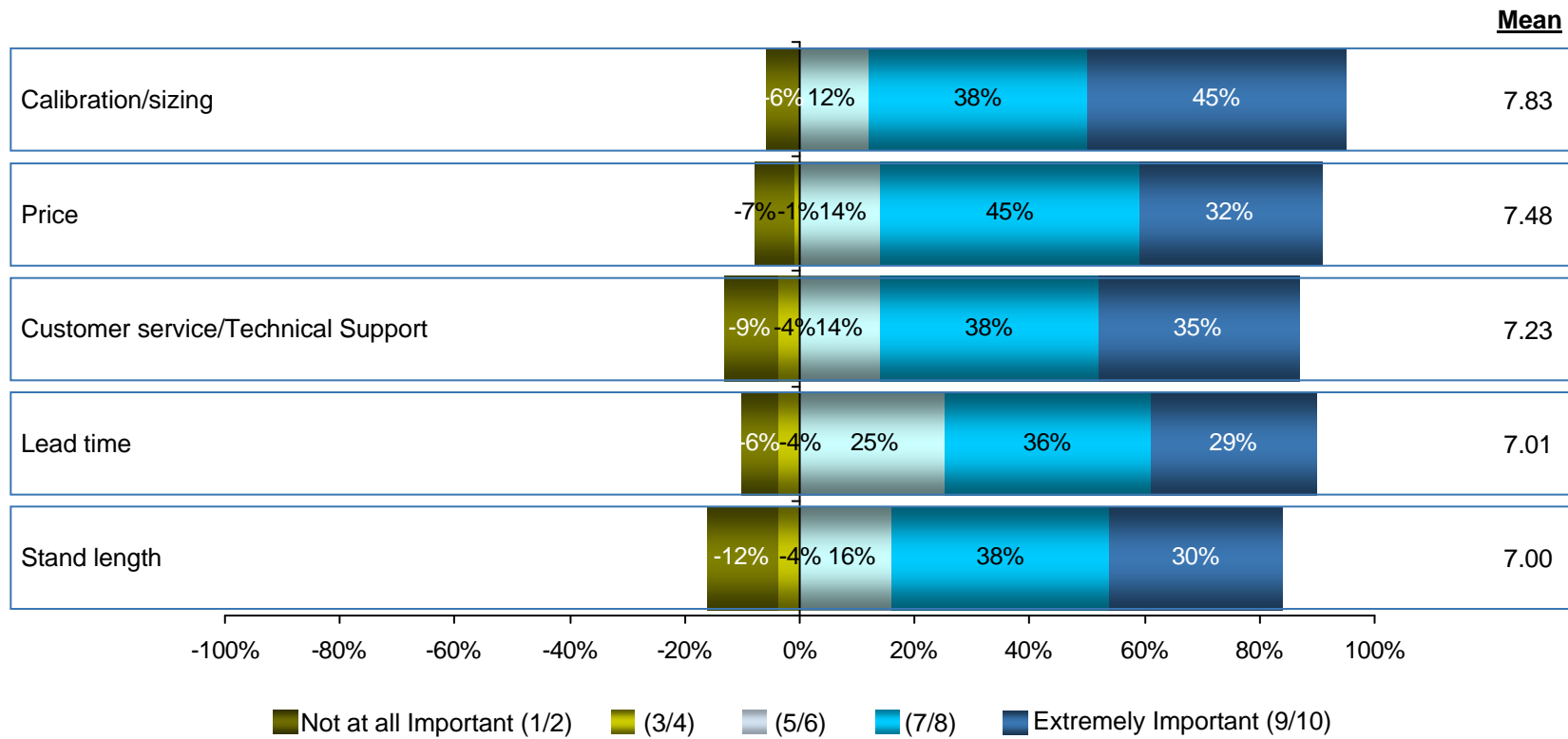
Total Respondents = 69

* "None" responses were taken from the "Other Mentions"

Note: Total may not equal 100% due to rounding

Important Purchasing Factors for Sausage Casings

13. How important are each of the following factors in your purchasing decision regarding sausage casings?

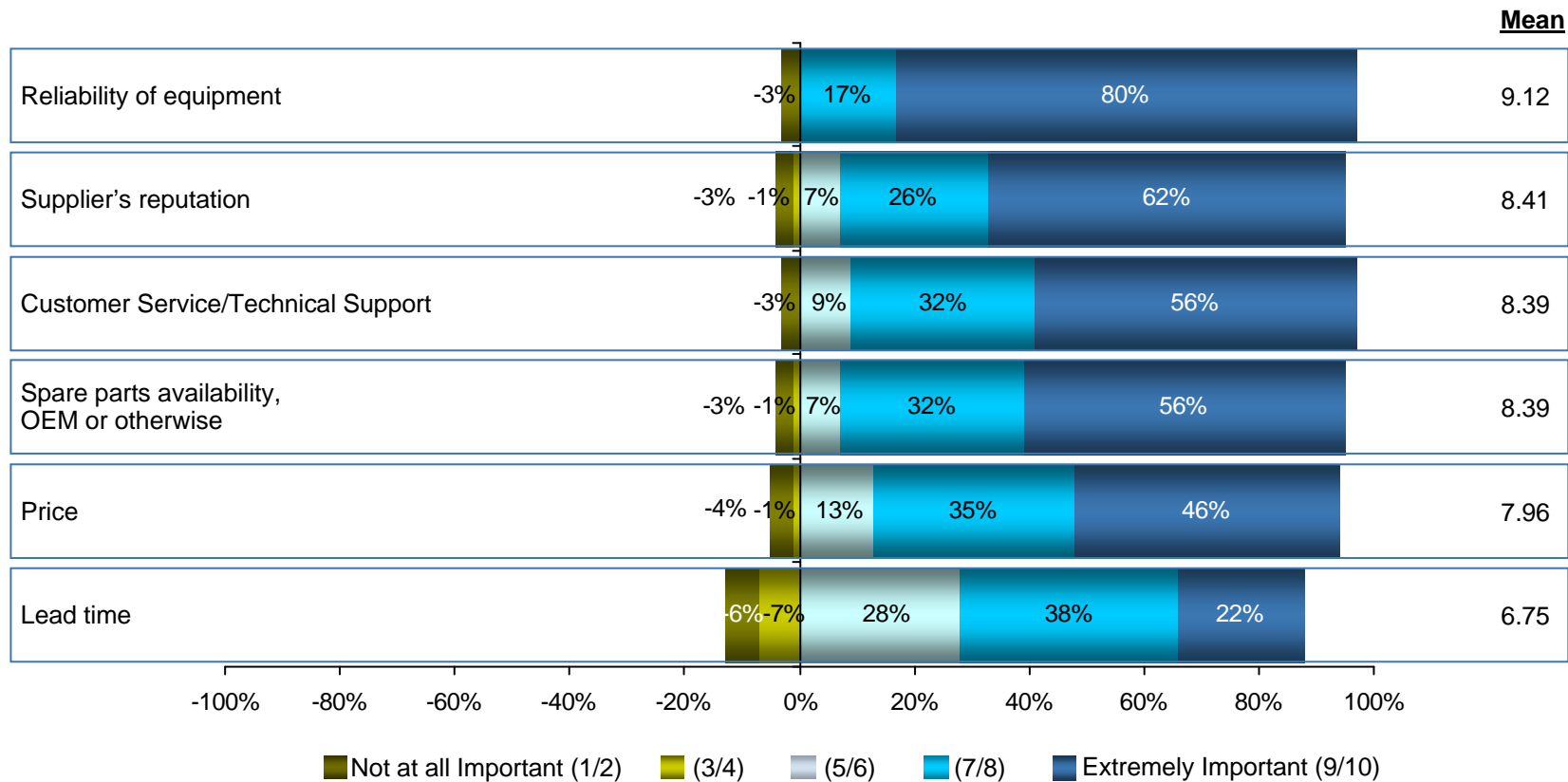


Total Respondents = 69

Note: Total may not equal 100% due to rounding

Important Purchasing Factors for Sausage-Processing Equipment

14. How important are each of the following factors in your purchasing decision regarding sausage-processing equipment (grinders, mixers, stuffers, smokehouses, etc.)?

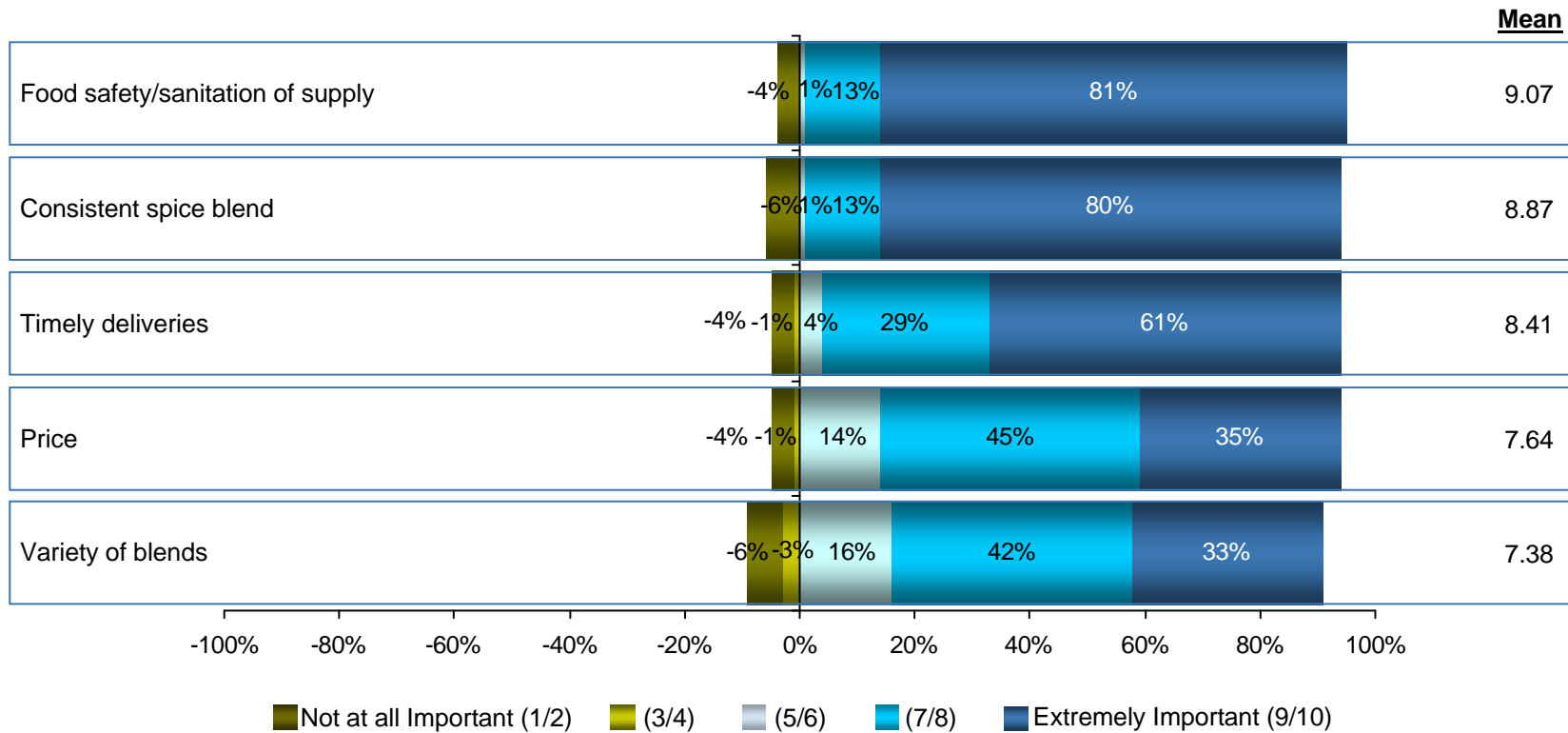


Total Respondents = 69

Note: Total may not equal 100% due to rounding

Important Purchasing Factors for Spice Suppliers

15. How important are each of the following factors in your purchasing decision regarding spice suppliers?

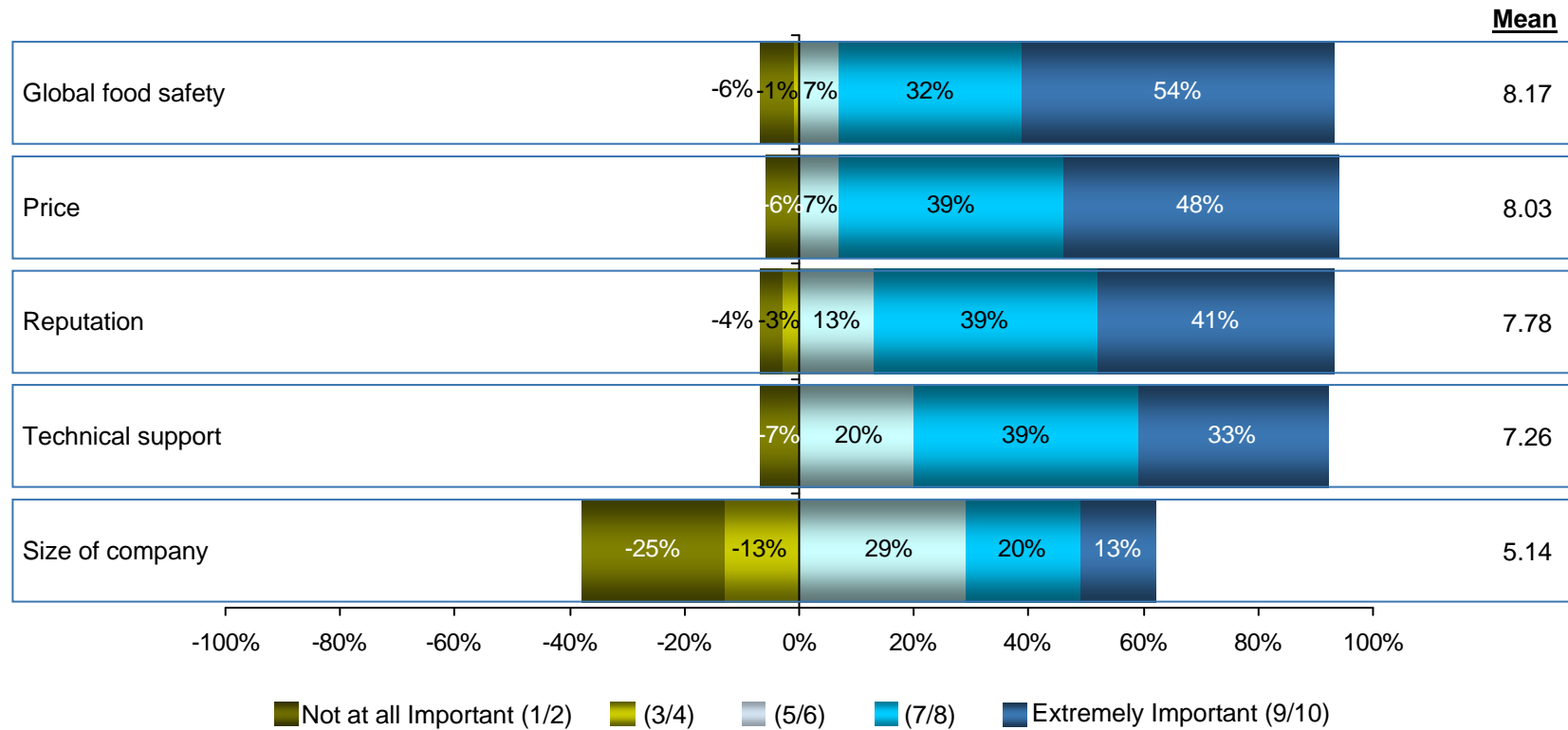


Total Respondents = 69

Note: Total may not equal 100% due to rounding

Attribute Importance Ratings for Natural Casing Suppliers

16. How important are each of the following attributes that you consider when selecting a natural casing supplier?

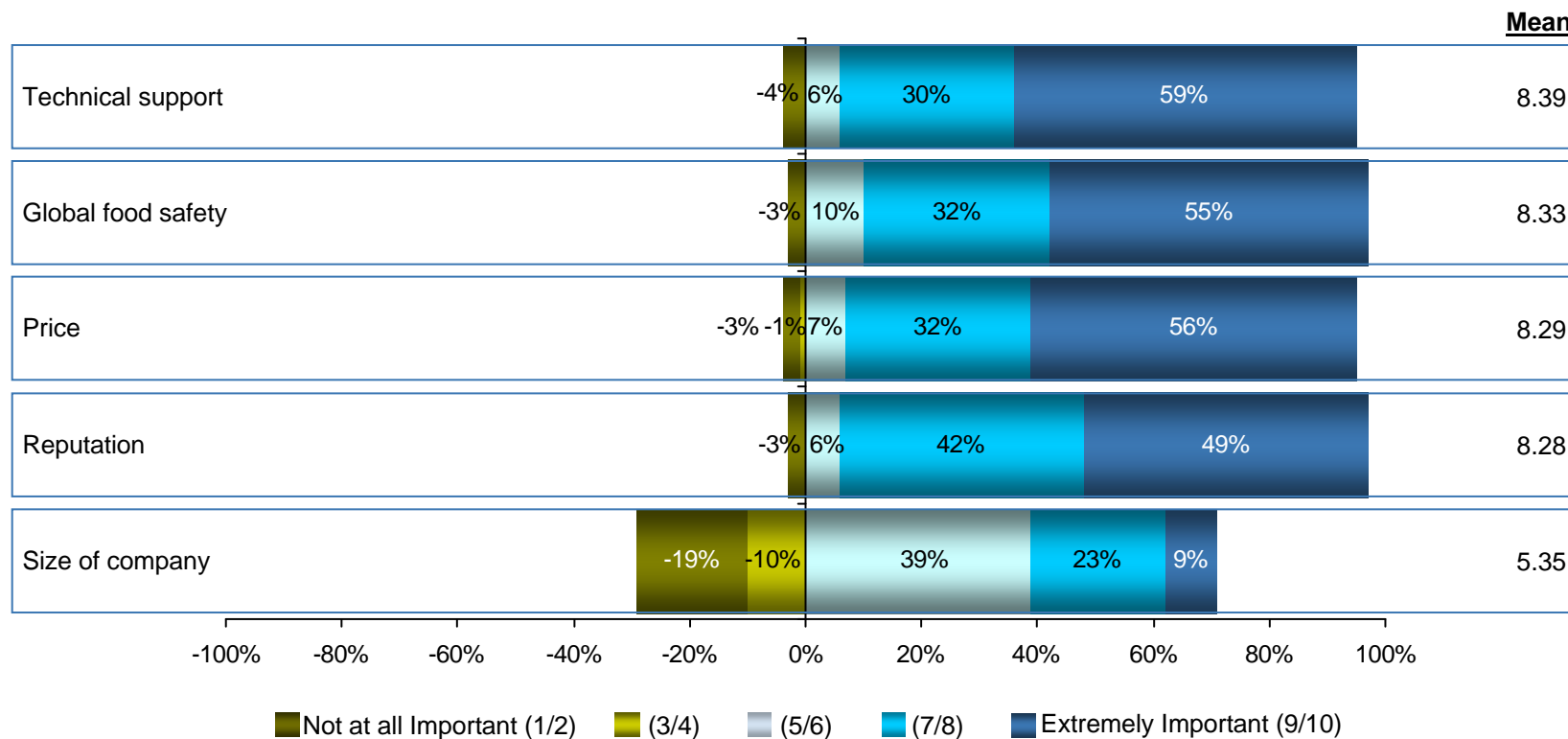


Total Respondents = 69

Note: Total may not equal 100% due to rounding

Attribute Importance Ratings for Sausage-Processing Equipment Suppliers

17. How important are each of the following attributes that you consider when selecting a sausage-processing equipment supplier?

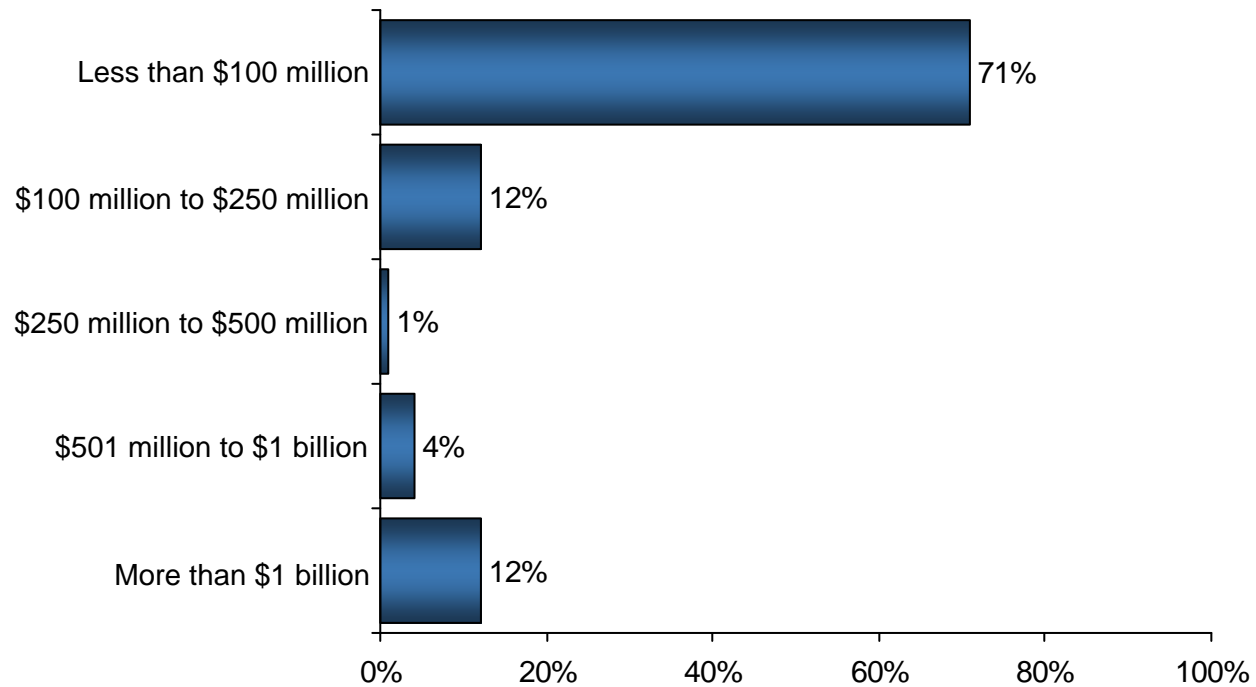


Total Respondents = 69

Note: Total may not equal 100% due to rounding

Company Sales Total

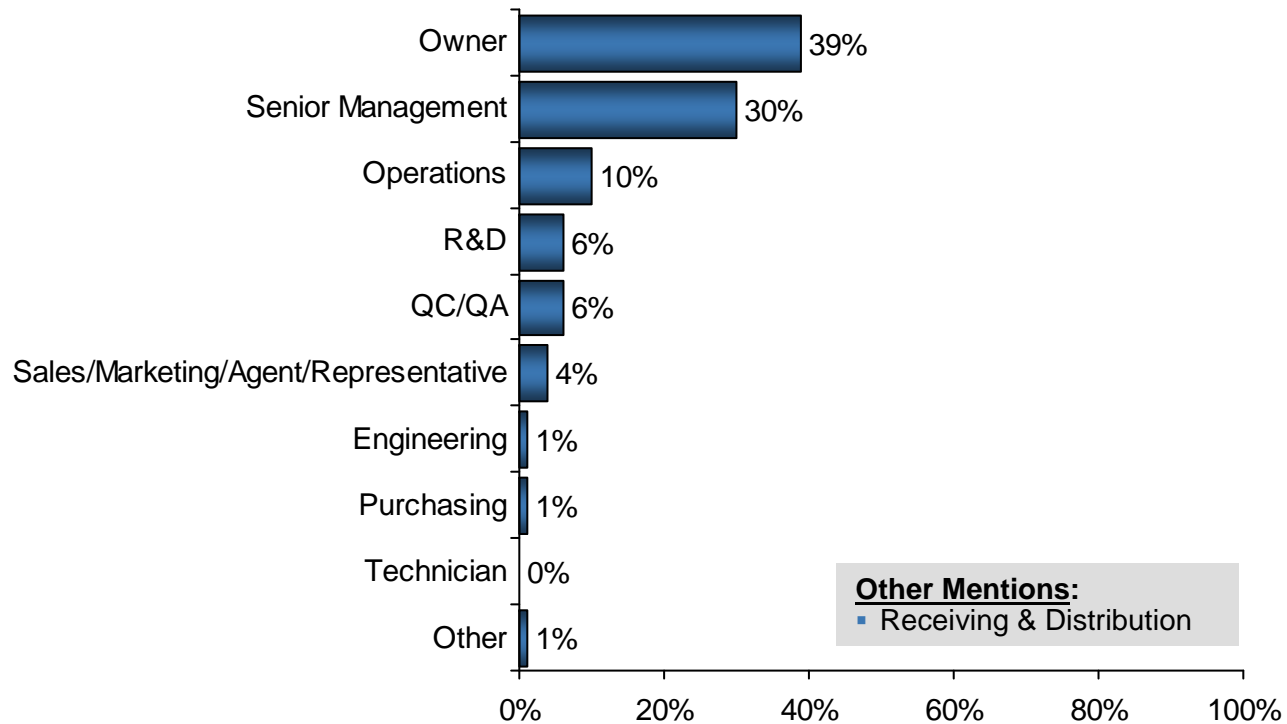
18. Regarding company sales, into which category does your company fall?



Total Respondents = 69

Job Position

19. Which of the following best represents your position within your company?

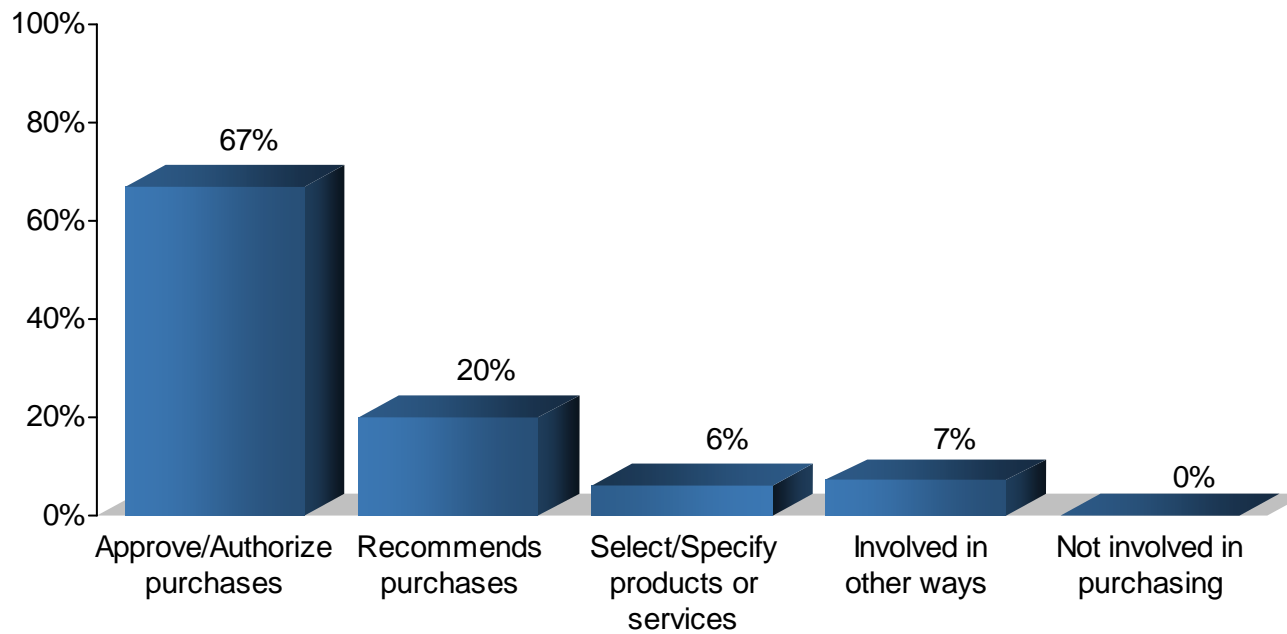


Total Respondents = 69

Note: Total may not equal 100% due to rounding

Purchase Involvement

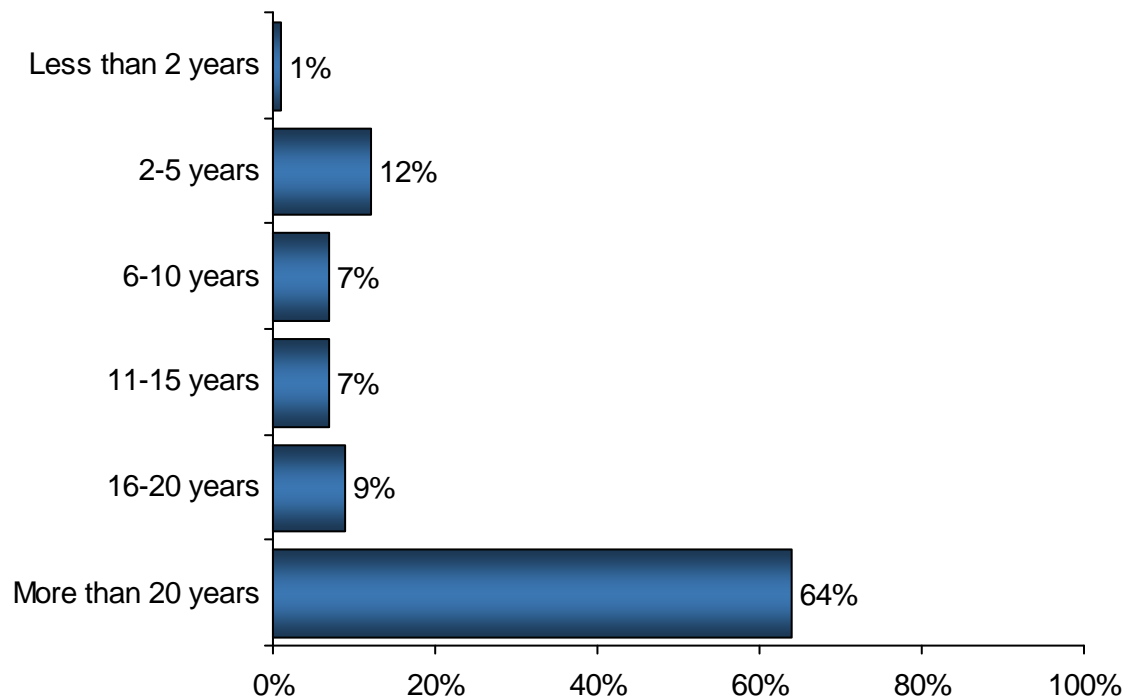
20. Which of the following best describes your usual involvement in your company's purchases?



Total Respondents = 69

Industry Experience

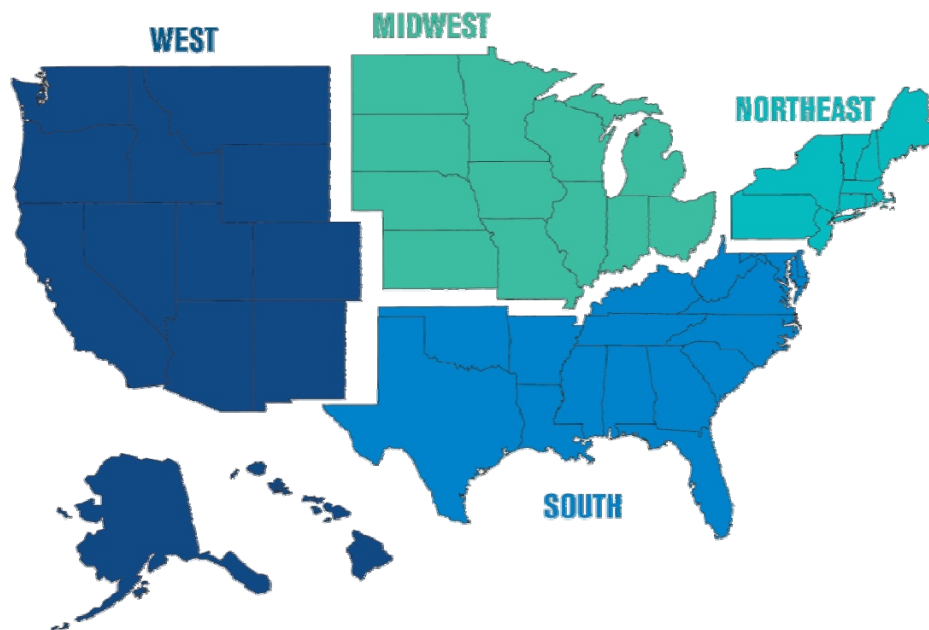
21. How many years have you been in the protein industry?



Total Respondents = 69

Respondents by Region

22. In which state do you currently live?



Region	
South	39%
Midwest	36%
West	13%
Northeast	12%
Total Respondents	69