### Valorisation of pork loin

**Current situation, consumption patterns and some opportunities for innovation**

Vincent LEGENDRE (1), Pierre LE STRAT (2) et Florence DELOBEL (3)

(1) IFIP-Institut du Porc, 34, Boulevard de la Gare, 31 500 Toulouse, France
(2) IFIP-Institut du Porc, 7 avenue du Général de Gaulle, 94 704 Maisons-Alfort Cedex, France
(3) Vitamines Conseil – 23 rue Jean de la Varenne 76130 Mont Saint Aignan, France

Vincent.legendre@ifip.asso.fr

---

**Keywords:** fresh pork products, loin, consumption trends, differentiation, innovative concepts

---

**Les Cahiers de l’IFIP**

Revue R&D de la filière porcine française

Vol 2 - N° 1 - 2015

---

Fresh pork consumption in France has been declining, and existing products suffer from a lack of differentiation. Of the different cuts, loin takes the main share of fresh pork products consumed in France. A study was carried out to assess the current situation of the fresh pork market, and to suggest innovative product concepts to revitalise it. Marketing tools and data from Kantar Worldpanel consumer panel were used to analyse pork consumption and the main characteristics of products. Consumer profiles were also drawn up. Comparisons were made with rival products, such as chicken cuts and minced beef. The diagnosis supports four innovative concepts. First-line qualitative tests were carried out among consumers.

---

Majoritairement orientée sur de produits issus de la longe, la consommation de porc frais en France suit une tendance à la baisse et souffre d’un manque de différenciation. L’ensemble des côtes, rôtis, escalopes et filets mignons couvre les deux tiers de la consommation de porc frais des ménages. Dans le même temps, des produits concurrents progressent, notamment les découpes de poulet et les éclaborés de volaille, apportant des réponses à l’évolution des modes de consommation. Une étude a été conduite pour réaliser un état des lieux des débouchés et de la consommation des produits de longe en France et suggérer des concepts de valorisation innovants. L’offre actuelle et les caractéristiques des consommateurs ont été analysées. Les quatre concepts développés ont fait l’objet de premiers tests qualitatifs prometteurs auprès de familles de consommateurs.

---

**Keywords:** fresh pork products, loin, consumption trends, differentiation, innovative concepts

**Mots clés :** porc frais, longe, tendances de consommation, différenciation, concepts innovants
**Introduction**

In France, pork loin is mostly commercialised as raw meat. The range of products it yields is still somewhat weakly differentiated. Four product categories obtained from loin, namely ribs, roasts, scallops and tenderloin fillets, together make up some 65% of all fresh pork consumed. Professionals consider the valorisation of loin to be insufficient. In particular, at the slaughter and cutting stage, the complete valorisation of the carcass suffers from an imbalance among the different cuts, which can reduce the competitiveness of the other pieces and so adversely affect producers’ gains. The issue of the valorisation of loin thus impacts on the overall balance of the entire pork industry.

In addition, trends in the fresh meat sector are still only weakly driven by demand, while consumer needs and expectancies are increasingly many and varied.

At the industry’s request, with the more general aim of enhancing performance, we set out to make an innovative appraisal of some novel concepts that may improve the valorisation of loin. The current situation concerning the use of loin and corresponding patterns of consumption are described, and some innovative concepts are proposed, illustrated by examples of products that have been actually developed and undergone first-line validation by consumers. Appraisal of the concepts is backed by a marketing approach (analysis of the positioning of the current offer, observation of the current offer internationally, characteristics of consumer needs, etc.).

The purpose of the project, conducted by IFIP and the VITAMINES marketing consultancy firm, was also to help the “fresh meat” sector adopt a still undervalued approach to achieving a better assessment of the market and its consumers.

**Materials and methods**

**Approach**

A three-step approach was taken:
- First we analysed the current situation concerning the valorisation of loin: main market outlets, status of the current offer, consumption patterns and characteristics of consumers, etc. We interviewed industrial operators and distributors to identify the position of loin and refine our thinking on its valorisation. We turned to existing production and consumption statistics.
- Our analysis of the situation enabled us to put forward four innovative concepts that could revitalise the market for loin. Each concept presents a sum of operational information to steer product development and foster targeted customer awareness.

To illustrate these concepts, four products were actually developed. These products were designed to illustrate the technical and economic feasibility of the concepts and to lead into the final encounter with the end-consumer.

**Data used**

Several sources of data were used to assess the situation of loin and of some rival products from other species (minced beef, chicken pieces, processed poultry products, etc.) and characterise consumption and consumers.

French production and international trade figures, together with statistics from the French federation of industrial pork producers and meat processors (FICT) enabled us to estimate the amounts of loin available for consumption and market outlets (consumption as fresh or processed meat).

Data from the Kantar Worldpanel consumer panel were largely used. This panel concerns the purchases of 12,000 households representative of the French population. The analysis crosses various indicators that define the purchasing behaviour of consumers with sociological and geographical characteristics. The base unit used for the Kantar panel data is the “household”.

Among the different sociological criteria, age and household composition, socio-economic class and type of housing area were analysed in further detail.

Panel data on fresh pork consumption in other countries were also used, in particular in Germany (GfK panel, processed and relayed by the AMI), the UK (Kantar Worldpanel panel, processed by BPEX) and Spain (MAPA panel, Spanish Ministry for Agriculture).

**Market outlets and consumption of loin products**

Loin is predominantly valorised as fresh meat in France

In France, loin is essentially consumed as finished fresh pork products. Based on availability for consumption, it is estimated that the proportion of loin used for processed products (cured and ready-to-eat meals) is about 15% (IFIP estimates), 85% ending up in finished fresh products.

At the household purchasing stage, loin valorised in France as fresh meat totals 75–80% of all pork consumed fresh. Loin in processed products totals about 5% of pork consumed in processed form.
Valorisation of pork loin - Current situation, consumption patterns and some opportunities for innovation

Salvatges de l’IFIP - N° 1 - 2015
63
Les Cahiers de l’IFIP - Vol 2

Decline in the consumption of loin owing to competitive rival products

Pork products and rival meats all seek to respond to the multiple expectancies and behaviours of consumers: nutritional requirements, taste quality, ethical aspects, fast-evolving modes of consumption, etc.

The main characteristics of consumption were observed for the principal first cuts taken from loin, and for other products, both pork-based (raw sausages, marinated pieces, etc.) and from other species (minced beef, chicken pieces, processed poultry products, etc.), for comparison. Our analysis was based in particular on data from Kantar Worldpanel, which reflect household purchases for consumption “at home”. Out-of-home catering was not taken into account. Household consumption of fresh products from loin has been declining. Between 2008 and 2012 it fell from 199,000 to 188,000 metric tons, i.e. by more than 5%.

At the same time, the consumption of chicken pieces and processed poultry products has gained ground, with an increase in quantities purchased of some 18% for each category in 4 years.

Sales of fresh minced beef have also seen an overall growth in recent years (up 4% between 2008 and 2012), despite a fall between 2010 and 2011 and a levelling-off between 2011 and 2012.

To make a finer analysis, the trend in consumption of fresh products from loin was broken down into percentage of purchasing households and their average purchasing level (quantities purchased per household per year, in kg). The main rival products competing with loin were compared according to household characteristics.

Analysis of the characteristics of consumer households shows that the most urban households, young consumers, especially single ones, and the wealthiest socio-economic classes consume the smallest amounts of fresh loin products, while families with children, the category that traditionally consumed most, have appreciably reduced their consumption in recent years. Conversely, seniors and...
modest-income households and those in less wealthy socio-economic classes bought and consumed the most loin. The analysis shows that products competing with fresh loin are popular among those categories of consumers who consume less loin than average. Fresh minced beef, chicken pieces and processed poultry products are well-represented in young households, where they meet a consumption demand. The consumption of these products is more evenly distributed according to type of housing location than that of loin, the purchasers of which are appreciably less likely to be urban. These rival products are also less likely to be widely consumed by seniors.

Some of the demographic categories who consume the least loin are large-sized consumer targets. In particular, the proportion of households living in major urban areas exceeds 60% – 46% for towns of more than 100,000 inhabitants. Young persons, singles and couples, totalled 13% of the population in 2012, and families of four persons and more 19%. Reaching these targets more effectively is thus a crucial issue for the sector in terms of potential sales volumes.

International comparisons

In addition to the analysis of the situation in France, the main characteristics of the valorisation and use of loin throughout its successive stages of processing and consumption have been studied in several other countries, in particular Spain, Germany and the United Kingdom. In these countries, the valorisation of loin is more evenly distributed between fresh and processed products.

- In the UK, bacon, made from loin and/or belly, is an important consumer product.
- In Spain, dried pork products like lomo are culturally important. The valorisation of loin from local pigs in Spain also includes the commercialisation of high value-added pieces such as presa, pluma or secreto. These are small pieces meant to be scorch-grilled and eaten pink. These pieces, highly reputed in top-end out-of-home catering are appearing more and more often on the French market.
- In Germany, the consumption of pork products is historically based on a broad range of cased products. These products made up more than 70% of the consumption of pork products in 2012. They are made from a blend of fat and lean, potentially derived from any pork pieces, which facilitates the overall valorisation of the carcass by the industry’s operators.

Definition of some innovative concepts

The fresh pork offer is still weakly diversified

Parallel to the consumer analysis, a comparison between the offer of fresh pork and poultry was made, taking into
account the diversity of consumer needs based on the essential motives for their choices: how and on what occasion they will consume the products. We opted to classify the offer according to use, from the most basic products (“ready to cook”) to finished (“ready to eat”) products, and according to the occasion of consumption, from “snacks” to “party-fare”.

The poultry offer covered all the situations well: whole fowl, pieces for cooking, breaded portions in family packs, microwaveable snacks, flavoured nibbles, etc. By contrast, the fresh pork products listed, whether for cooking or ready-prepared, were mostly concentrated around sit-down meals. They were underrepresented in certain segments: snacks, top-end nibbles, ready-to-eat products and auxiliary products (e.g. cooking ingredients). The graphic representation does not belie the fact that the fresh pork offer is evolving and expanding. It illustrates the potential for development of fresh pork in response to consumer expectations compared with poultry, which has become strongly diversified over the last decade.

In addition, the retailing of fresh pork products, which are strongly dependent on promotions and often displayed for self-service, maintains an image of a basic meat product, inexpensive but weakly segmented.

### Four concepts for valorisation

Based on unmet demand and the possible ways of improvement identified, and on consumer trends, four concepts for the valorisation of the offer were selected.

Each concept is paired with information on the corresponding consumer profile, the types of product envisaged, the possible product ranges, etc.

An international benchmark for the existing offer was established to illustrate each of the four concepts.

First, “gourmet pork” aims to offer consumers original products that are refined and project a premium image. There are two strands: “ready-to-cook” and “ready-to-use”.

The consumers targeted are mostly over-40s in the higher socio-economic classes.

- The idea of “ready-to-cook” gourmet pork is to bring a top-end differentiation into the fresh pork trade: work on the originality and appeal of cuts and presentation, emphasis on “exceptional” pieces (like pluma and secreto, presented as top-of-the-range products in Spain), etc. The product is expected to be consumed intermittently, on festive occasions.

- “Ready-to-use” gourmet pork also targets occasional consumption, but is centred on fresh products and cured products for parties and buffet-type eating.

“Easy-to-cook” pork products offer convenience and ease of preparation, which are very strong trends in patterns of consumption. They are easy to prepare, offered in ranges with varied flavours and with simple cooking requirements. The consumer target is broad, including in particular under-50s in urban households, large families and singles, depending on the packaging proposed. This concept comprises “easy-to-cook” and “easy-to-prepare” ranges.

- The aim of the “easy-to-cook” range is to offset the sparse knowledge of consumers concerning the cooking of fresh pork products, and the resulting lack of tenderness (dry meat) that can cause disappointment on eating, which strongly deters consumers from buying fresh pork.

- The second concept works on the idea of «convenience pork», which is quick to prepare, with the aim of strengthening the place of pork loin among fast, easy-to-prepare products, while at the same time emphasising the advantage of the variety of possible preparations and flavours obtainable with fresh pork, which consumers appreciate.

Thirdly, “snack pork” aims to bring loin products into line with trends in consumption and multiple uses, in particular the destructuring of meals and the rise in grazing and eating on the hoof. In particular, the aim is make an offer suited to children, teenagers and young adults, especially urban. The concept ranges from snacks to meat used as an ingredient or garnish.
• Snack products are intended for easy, fast consumption at any time. Helping to bring fresh pork products into this category entails moving away from butchery meat, and “breaking the mould”.
• In view of the multiple possible uses, pork as an ingredient in prepared products (sandwiches, snacks, salads, etc.) is also a direction to pursue, through which it is possible to address industrial food processing operators (ready meal manufacturers, etc.) and also out-of-home catering.

Lastly, “fun pork” aims to offer healthy playful products for children, and through them the whole family, in order to win over the youngest generations. The consumers targeted are families with young children.

**Products that illustrate these concepts**

To make these concepts more concrete and obtain initial qualitative feedback on their relevance, test products were developed in partnership with industrial suppliers of equipment, ingredients and packaging. We set two constraints:
• Standard quality raw material, meeting butchery specifications classically encountered in industry.
• Use of relatively simple technologies, not requiring over-specific equipment.

We opted to offer loin in the form of four products stemming from a common process feedstock, subsequently differentiated through separate work-up according to the set concepts. The organoleptic properties of the products, i.e. their recipes and seasoning, were deliberately left open, because we primarily wanted test pieces illustrating concepts. We considered that development closely tied to a precise seasoning range lay more within the scope of companies wishing to use the concepts proposed as a part of their own range of products.

The four test products were as follows:
• Vacuum-packed marinated roast pork (gourmet pork / convenience pork). The roast is meant to be cooked in its bag, with set time-temperature instructions given to the customer in order to ensure tender meat without difficult cooking control.
• Sautéed pork with soy sauce to be added during cooking, prepared in 10 minutes in a pan or wok (convenience pork).
• Small portions of breaded pork scallops for children (fun pork)
• Cooked coated pork sticks to be heated up in a microwave oven (1 minute) and eaten directly with the fingers (snack pork).

The first promising feedback

Four families were selected for each of the products. Each family received one unit of the product, instructions for its optimal use, and a questionnaire to collect their opinions before and after use and assess their interest in the product and their possible intention to purchase. The aim was to obtain initial qualitative information on the relevance of the concepts and on what directions to take in order to refine them and improve their performance.
The vacuum-packed roast pork was tested by families who were regular pork eaters. The product was judged appetising at first sight and found very good to eat. The convenience of the packaging and cooking (the oven stays clean) and the tenderness of the meat were noted. The advantages of “quality meat”, “clean cooking” and “ease of preparation” were clearly appreciated. Verbatim (actual quotations of consumers about the products):
- “Tender meat, not dry”
- “No smell all over the house”
- “Not messy”
- “Less washing-up to do”

The sautéed pork with soy sauce was tested by families with children and by young couples. The product was judged not very innovative, but very convenient and good for variety. Ease of preparation and meat quality (tenderness) were highly appreciated. Verbatim:
- “Easy to prepare”
- “Pre-portioned”
- “Change from usual meals”
- “Convenient and good, lends variety”

The breaded pork scallops were tested by families with young children who knew and already consumed “this sort of product” (cordon bleu, fish fingers, etc.). The convenience and taste of the products and their “natural” appearance were appreciated. Verbatim:
- “Convenient, fast and easy”
- “More natural than cordon bleu”

The pork sticks were tested by families with children and teenagers, mostly regular consumers of meat-based processed products (chicken nuggets, frankfurter-type sausages, etc.). The product was not judged especially “innovative”, but was much appreciated by the tasters. The rapidity of microwave cooking and the fact that the product needed no preparation were greatly appreciated. Having to eat the product with the fingers was well accepted. Verbatim:
- “Tender, good taste and good smell”
- “A nice format for pork”
- “Convenient, amusing, the children like it”
- “The pleasure of nibbling from time to time”

These first qualitative tests using actual products in real conditions of consumption are encouraging. They are the start of a validation process that must now be continued and deepened by more thorough and more operational analysis (narrower targeting of consumers, quantification of intention to purchase, deeper thinking about positioning and emphasis in commercialisation circuits, selling price points, appropriate commercial and promotional strategy, etc.)

The breaded scallops and sticks also raise the possibility of offering “healthier” products than those usually sold in this segment, providing an interesting opportunity for differentiation.

**Conclusion**

Based on an “anatomical” approach, i.e. the valorisation of loin to facilitate optimal commercialisation of the whole carcass, this study yields wider findings concerning all fresh pork products among which loin holds a prime position. The approach used combined an appraisal of the current situation, the definition of some innovative concepts and the technological development of products to give these concepts concrete form, test their application and illustrate their feasibility. Methods from marketing were used to position the concepts, cast an innovator’s eye on the existing competing products and submit the concepts to a first-line validation by consumer families.

In addition to the content of the findings made and the concepts developed, the project aimed to show the importance of adopting an approach that took better account of consumer expectancies and their evolution in the definition of the offer designed for them.

The four concepts developed were intended to prompt discussion and stimulate thinking by professionals in the pork industry. The ultimate purpose is still of course to ensure outlets for the whole carcass. The best valorisation of loin, and in general of all fresh pork, needs to ensure more flexibility and competitiveness in the valorisation of the other pieces, whether for curing and salting or for export.

The concepts proposed open up avenues for further work that must be extended and deepened: work on products and on packaging, and on concrete aspects through more operational approaches to steer market placement, etc. The characterisation of the different circuits of commercialisa-
tion must also be taken into account to allow efficacious positioning.

In a context that is difficult for the French pork industry, it is crucial that the operators make a relevant offer, the benefits of which are clearly perceived by consumers, at an acceptable price. It is essential to reassure consumers (health safety, modes of production, etc.), please them (recruitment, loyalty), and educate them (how to prepare and consume products), and so enable pork to stand out among rival meat products obtained from other species.

Acknowledgements

This study was co-funded by INAPORC and FranceAgriMer
Industrial project partners: Lutetia, Rap’s, Cryovac

References

- BPEX / National Pig Association (NPA), 2013. Porkwatch – Data about origin labeling, January 2013
- Gira Food Service, Le marché de la RHF en 2012

Reference to this article