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ACTION

TIME TO TANGO:
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LATINOS
ARE PORK'S
FUTURE
pork



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EXECUTIVE SUMMARY



From the head to the tail and every cut in between, pork is entrenched in Hispanic heritage and culture. Whether celebrating milestone moments, large gatherings of family and friends, or everyday meals, pork is at the table.

As the largest minority in the United States, Latinos in America will represent more than \$1.7 trillion in buying power in 2020 – and that buying power is growing at twice the rate of non-Hispanics.^{1,2} U.S. Hispanics spend \$95 billion a year on consumer packaged goods.³ They also have a high affinity for fresh meat and pork indexes high in their basket.

Theoretically, this is all great news for the domestic U.S. pork industry. We have consumers who love our product. It plays a significant role in establishing their sense of community and family. Drawing on the metaphor in this report's title, *Time to Tango: Latinos are Pork's Future*, they are passionate about what we offer, and want to have a strong, lasting partnership with us.

But there are signs of concern, and we must avoid missteps.

As Hispanics become acculturated in the United States, our data shows the strong link between pork and culture weakens. If they can't find the pork cuts their traditional dishes call for, they migrate to other proteins, or seek out specialty shops. Nearly

half (49%) of Hispanics do not choose mainstream retailers as their go-to store, and instead opt for specialty stores, ethnic markets and bodegas. The meat case may be a core-contributing factor – 44% of Hispanics choose to buy their fresh meat at non-mainstream grocery stores.

With Hispanics spending \$95 billion a year on consumer packaged goods, if 49% of Hispanics do not choose mainstream retailers as their go-to stores, imagine the potential basket spend that's walking out of mainstream grocery into specialty stores and bodegas.

Like many of their non-Hispanic counterparts, U.S. Latinos have misconceptions about pork's nutrition. If we don't reinforce the Hispanic connection to pork and dispel some of the inaccuracies about the "healthfulness" of pork, we may lose a once-in-a-generation opportunity.

Hispanics have a strong desire to stay connected to their culture, traditions and family, and if we make the necessary changes today, the connection with pork can remain central and vital at every stage of acculturation.

But that means thinking differently – both at the processing plant and at retail. In this report, we'll explore three key areas where stakeholders

can win with Latinos: Accessibility, Health and Authenticity.

In each of these areas, we have uncovered opportunities to help retailers retain and expand Latinos' spend in the category. However, it's not a one-size-fits-all solution; to successfully engage Hispanics, we must pay attention to both the similarities and differences between different Hispanic groups. What works well in Florida may not be successful in California. And an entirely different approach may be necessary in the Northeast.

The music is right. There's a shared passion between us. It's Time to Tango.

HISPANIC OR LATINO?

You may have heard both terms used by companies, brands and marketers and wondered, "Well, which is it?"

If that's the case, you're not alone.

While both terms are correct and commonly used interchangeably, they are not exactly the same. For instance, consumer preference may differ when it comes to using one term over the other. To be inclusive and consistent, and to compare behaviors among the general population, the National Pork Board will use both terms – Hispanic and Latino – interchangeably in this document.

LATINOS: A MOSAIC OF CULTURES



While Hispanics share many cultural traits stemming from the combination of heritage and traditions from Spain and Native American cultures, there are many differences among them. Despite the similarities and the unifying power of a common language - Spanish - each nationality has characteristics and personalities that are unique. From geography to history, from religion to politics, each Latino culture has been uniquely shaped to an identity of its own.

It is tempting to think about U.S. Hispanics as being one and the same. But it's important to understand and account for the many nuances to establish a meaningful connection with these consumers and market to them successfully.

Latinos of Mexican origin or descent represent the largest group in the United States, with two-thirds of all Hispanics belonging to this group. However, various other cultures and countries of origin are represented in the U.S. Hispanic population, as well as different levels of acculturation within them.

WHAT IS ACCULTURATION?

Not only are there cultural differences within the U.S. Latino population, there are also different acculturation groups. Understanding acculturation is key to understanding the Hispanic population in the United States.

Acculturation is a term used to describe the process of integrating elements of a culture into one's life. In the case of U.S. Latinos, acculturation refers to the process by which an individual integrates social and cultural practices, traditions, principles and values from mainstream U.S. culture and Hispanic culture into their own lives. This integration happens naturally, most often, without an individual being conscious of that process taking place in their lives.

An easy way to think about acculturation is long-term personal relationships. When someone enters a relationship with another person (e.g., a significant other, a friend, a colleague, a mentor, etc.), a micro version of acculturation takes place: through that relationship, each person exerts a level of influence on the other while reciprocally being influenced. Over time, as the relationship grows, an integration of "personal cultures" helps define their relationship and who each person is.

Going back to U.S. Hispanics, acculturation is exactly that experience: how cultures are part of someone's life and how they define and influence who they are. To be clear, acculturation does not mean assimilation and does not suppose an abandonment of their Hispanic cultural heritage in favor of American culture.



WHAT INFLUENCES ACCULTURATION?

How a person integrates cultures into their life is a personal journey influenced by a myriad of things. Each path is personal and unique. How and when it happens remains a mystery, but it happens, and context plays a big role.

What language one grows up speaking or hearing, what media is consumed, where (in which cultural context) one’s formative years are lived, what cultures or cultural groups are around, place of birth and how long one has lived in the United States all play a role in shaping the acculturation journey.

HOW IS ACCULTURATION MEASURED?

In marketing and sociology, there is no standard way or an agreed upon method to measure acculturation for U.S. Latinos (or any other cultural group). Traditionally, the marketing community has approached acculturation in different ways, but has commonly relied on methods and algorithms developed to fulfill the need to communicate to Latinos in a language they understand and through the media they consume. Alternative acculturation models take into account attitudinal factors that address an individual’s emotional closeness to Hispanic culture and American culture.

For the purpose of the National Pork Board’s deep dive into the U.S. Hispanic consumer, we used a model⁴ that relies on attitudinal factors measuring an individual’s sense of proximity and connection to Hispanic culture and American culture.

While the models to measure acculturation vary, the large majority agree on three resulting consumer groups that sit on an “acculturation spectrum.”

The acculturation model used for this report yields the following U.S. Hispanic acculturation groups:

- Unacculturated: estimated to be 30% of the U.S. Latino population
- Bicultural: estimated to be 55% of the U.S. Latino population
- Acculturated: estimated to be 15% of the U.S. Latino population



ACCESSIBILITY: CUSTOMER EXPERIENCE AND VARIETY ARE KEY



Al Pastor Taquiza

When the holidays arrive, or a special family occasion like a quinceañera celebration (a cultural and religious celebration of a girl's 15th birthday, signifying the passage from girlhood into womanhood), many Hispanic families look to traditional recipes to celebrate. Popular dishes like lechón asado (roasted pork, usually whole suckling pig) or pernil (pork shoulder/picnic roast) use large pork cuts that can feed the whole family at these gatherings. This is especially prominent among Latinos from the Caribbean, such as Cuba, Puerto Rico and the Dominican Republic. In other Hispanic cultures, like Mexican culture, the same cuts are used differently, such as the pork shoulder or picnic roast used for carnitas tacos and served to the family “taquiza” style. The usage may vary, but the love for family and larger pork cuts is consistent across most Hispanic cultures.

When preparing dishes such as lechón asado, procuring a whole suckling pig is key – something that's not usually offered in mainstream grocery stores. That helps explain why 44% of Latinos turn to specialty stores and bodegas for fresh meat purchases. They may turn to a Hispanic butcher (carniceria), where they can find these cuts and likely chat in Spanish about how to prepare them.

Specialty stores offer more than just special cuts – they offer a familiar atmosphere and personal service. For many Hispanics, mainstream grocery stores fulfill some needs, but they turn to alternative stores for their meat purchases. In fact, most Hispanics (65%) shop at multiple stores to get the food and beverages they want.⁵

To capture this lucrative market, traditional retailers must understand how Hispanics shop for meat and how their shopping experience and expectations drive loyalty. Understanding these behaviors and preferences comes down to two factors: experience and variety.



BUILDING A BETTER SHOPPING EXPERIENCE

Hispanics are savvy shoppers. They will look long and hard for the products they want and the value and quality they expect. Nearly 4 out of 5 (78%) Hispanics agree “grocery shopping is an important part of my routine.”⁶

For the most part, Hispanics shop for perceived value – no matter their household income.⁷ Nearly three-quarters (72%) of Hispanics shop at multiple stores to save money.⁸ As they become more affluent, Hispanics tend to choose from a wider variety of brands and products, but they still prioritize keeping an eye on their wallets.⁹

According to our qualitative research, Hispanics judge value not just by the price of the goods, but by the quality of the product and the in-store experience, such as a butcher who can speak Spanish and understands their food culture. For Hispanics, it’s about relationships and experience as much as it is about price.¹⁰

But butchers and store staff matter to Hispanic shoppers beyond the relationship they provide. They offer the opportunity for Latino shoppers to ask for suggestions, order in Spanish, request cuts using names used in their country of origin and ask for cuts to be customized to their personal preferences.

IMPLICATIONS AND OPPORTUNITIES

PACKAGING OPPORTUNITIES

- Provide pre-packaged, authentically pre-seasoned cuts for retailers to use for Latino-inspired hot bar dishes, as well as smaller versions for consumers to prepare at home.
- Offer a variety of both bulk packs and smaller packs to appeal to all types of value shoppers.
- Provide packaging that looks like it was cut in the back of the store, which gives a more fresh, hands-on impression. For example, use a tray and overwrap versus case-ready rollstock packaging.

RETAIL OPPORTUNITIES

- Provide prepared Latino-inspired dishes featuring pork in-store. Good quality in-store prepared food may have a positive impact on Hispanics’ perception of the quality of other items as well, such as fresh meats and produce.
- Provide in-culture meat staff to cater to Latino customers or proper training for current staff.
- Ensure that stores have the ability to customize the fresh meat case by making it a full-service area.
- Leverage store sets and/or banners as opportunities for micro-marketing pork to individual Hispanic communities.

GROCERY SHOPPING: IT'S A FAMILY AFFAIR

For many Hispanics, shopping is a family experience. Four out of five (79%) Hispanic consumers shop with someone else, such as their spouse, kids or extended family, significantly more than the 61% of U.S. shoppers in general who say they shop with others.¹¹

The presence of children shouldn't be surprising – Hispanic households are significantly more likely than average U.S. households to have children.¹² Nearly half (47%) have children, led by Hispanic Millennials.¹³ The presence of children in their households influences family dynamics and purchase decisions. Often, meal choices are selected based on dishes the children are likely to eat.¹⁴



Shoppers with children can be a valuable consumer segment for retailers. An Acosta shopper study shows Hispanic shoppers with children at home make significantly more monthly grocery trips and spend more on groceries than Hispanic shoppers without kids (\$381 versus \$281) – no doubt, at least partly due to their larger household size.¹⁵

How can retailers draw more Hispanic families to their store?

- **Offer a family-friendly experience and selection:**

As shopping with young children can add some tension, these consumers tend to shop at grocery stores where they feel they are welcomed as a family.¹⁶ Children also are more likely to have input as to when fresh pork dishes are served in Hispanic families (9%) than in non-Hispanic families (3%), and especially among unacculturated (12%) Hispanics. Dishes such as lechón asado, perrito and tacos al pastor (a popular Mexican street taco using pork shoulder) will win over the entire family. Retailers and packers can respond by offering pre-sauced or pre-seasoned meal kits for busy families, such as pork torta de milanesa, a popular Mexican sandwich featuring pork cutlets, avocado and pineapple salsa.

- **Consider cultural ties:**

Culture and language are important to Hispanics, something they value and aim to maintain in their families. For example, 73% of Latinos say they want their children to carry on their family's cultural traditions.¹⁷ Food plays an important part in Hispanic culture and traditions – 79% of Hispanic families cook meals to retain a connection to their native culture.^{18,19} Latinos often celebrate and share their culture with family and friends through food.²⁰ Retailers need to consider cuts popular at Hispanic family gatherings such as shoulder "paleta" and whole pigs for lechón asado. Offering these cuts consistently throughout the year is key because Hispanics will go elsewhere to satisfy their needs for some larger cuts. Offering these cuts through special orders is also an option because large family occasions that would call for these cuts are usually planned in advance. Knowing they can count on a larger retailer to deliver on these special orders consistently can help Hispanics develop more confidence in and loyalty for traditional grocers.

THE PROMISE OF ONLINE SHOPPING AMONG HISPANICS

Although the Hispanic shopper tends to have less access to online grocery shopping (54%) than the average U.S. shopper (61%), those who do have access are more likely to use it (65% versus 59%).²¹ Bicultural and unacculturated Hispanics have typically under-indexed for online shopping, but that trend may be changing.²²

Online grocery shopping is particularly popular with Hispanic shoppers who are either male, earn more than \$50,000 a year, are between 18 and 34 years old, or are from South America.²³ About half of Spanish-dominant and bilingual Hispanics are willing to pay for a grocery delivery service to save time.²⁴ Male shoppers are more willing than female shoppers to trust their grocer to pick out their food when ordering online.²⁵

Many Hispanics like specialty cuts, such as offal and belly, so online ordering could provide an opportunity to gauge interest for these cuts on a regular basis. This could help boost loyalty and spending from Latino customers.²⁶

While whole hogs are already available online, specialty butchers turn to the web to offer a greater variety of cuts and subscription options that are beginning to make a dent in traditional grocery sales. For example, the *Power of Meat* report from the Food Marketing Institute found 19% of shoppers bought meat online in 2017, compared to just 4% in 2015.²⁷ According to Nielsen, growth of fresh meat sales online is outpacing fresh meat sales at traditional grocers.²⁸

With their ability to offer more cuts, more transparency and more customization, it won't be long before these digital butchers capture a greater share of the lucrative Hispanic market - by going direct to the consumer - if retailers and packers don't respond.



About **half** of Spanish-dominant and bilingual Hispanics are willing to pay for a grocery delivery service to save time.

**VARIETY:
OFFERING
CUTS HISpanic
CUSTOMERS LOVE
CAN DELIVER
LOYALTY**

The variety of ways Latinos prepare and plate pork is endless, thanks to its versatility. From Mexican-style burritos and tacos, to a Latin twist on a classic pasta or rice dish, pork has traditionally been a prominent ingredient in Hispanic households. For Latinos, a meal goes beyond the food that is served; it's a symbol of tradition and bringing family together, and what brings families together more than the holidays?

It's no surprise then, that some of the most commonly prepared dishes during the holiday season are anchored around pork; the classic lechón asado is a staple for Christmas Eve and New Year's celebrations spanning all the way from the Caribbean to Spain. Some Hispanic families opt to substitute or complement traditional proteins, such as Thanksgiving turkey, with pork during special occasions, while others opt for a traditional dish like marinated roast pork instead of turkey. Other Hispanic families will incorporate pork into their turkey preparation. Pork-stuffed turkey has a nickname amongst Hispanics, "pavochon." This nickname is derived from the combination of turkey ("pavo" in Spanish) and pork ("lechón" in Spanish).

In Mexican holiday tradition, pork tamales are a must-have at the table. Beyond simply enjoying these pork tamales at the feast, tamales bring the family together during the preparation. It is customary to find assembly lines of family members working and laughing together in the kitchen as they collectively prepare tamales (made with pork shoulder and lard) for Christmas dinner. This is a perfect demonstration of how pork offers a sense of camaraderie and brings Hispanic families together like no other protein can. Hence, why pork is the favored accompanying protein for Hispanics.

We have already seen that Latino shoppers are willing to go the extra mile - or miles - to find the type of pork they want. Often, they seek cuts not available in most mainstream grocery stores for a particular type of Hispanic meal they are preparing. However, at specialty stores, they anticipate finding different cuts and preparations of pork that are culturally relevant and familiar.

Hispanic consumers, both unacculturated and bicultural, agree the selection of pork cuts in mainstream stores is minimal, and when compared to chicken and beef, the variety is far less appealing. However, pork cuts used in traditional Latin dishes, for example, chicharrón and Kan Kan pork chops - a cut that includes the loin, rib meat, belly and skin - to name a few, are primarily available in Hispanic specialty or bodega stores and visually appeal to the Hispanic audience.



Tamales



When looking for specific pork cuts, Hispanics rely on specialty stores that cater to multicultural audiences because they feel they can depend on finding a larger selection to satisfy their preferences. Even beyond the preferences for the types of cuts found in Hispanic countries, there are preferences amongst the “typical” cuts found in the United States – thinner pork chops or pre-cut ribs to use as ingredients in stews versus the center of plate. Oftentimes, the Latino consumer will create a relationship with the butcher at a specialty store who prepared pork to the shoppers’ liking. However, understanding that pre-cut ribs, for example, is something Latinos look for, retailers can offer that as an already prepared option.

If the butcher connection is not there, and the type of cut is unavailable, Hispanics shoppers will likely go elsewhere in search of the specific pork they want, and in turn, complete the rest of their shopping list in that alternate specialty store.

To win back these consumers, retailers must gain an understanding of the Hispanic consumer and what they want to see in the meat department. Ensuring an appealing pork display is key, as is consistently featuring a wider variety of cuts Hispanics crave.

On pork packaging, messaging around common uses for cuts in Latino dishes could appeal to Hispanic consumers and inspire new recipe trial among non-Hispanics. Offering thinner cuts could also appeal to both Hispanic and non-Hispanic consumers. Providing pre-packaged, pre-seasoned cuts for retailers to use for Latino-inspired hot bar dishes, as well as smaller versions for consumers to prepare at home, can also increase both in-store and at-home usage.

TAILORING COMMON CUTS TO HISPANIC NEEDS

Among the common cuts widely available in most mainstream stores, Latinos choose ribs, chops, tenderloin and roast more often than non-Hispanics for at-home usage.

PORK CUTS MOMENTUM: WILL EAT MORE IN THE FUTURE

CUT	HISPANIC	NON-HISPANIC
PORK RIBS	29%	21%
PORK CHOPS	28%	21%
PORK TENDERLOIN	23%	18%
PORK ROAST	22%	16%

Looking in-depth at Hispanic use and behaviors, there are a number of ways retailers and packers can appeal to these consumers.

PORK RIBS: INDULGENT, INEXPENSIVE AND VERSATILE

Latinos use pork ribs in an array of traditional Hispanic dishes, from tacos to soups. As previously mentioned, Hispanics are less likely to use pork as a center-of-plate dish. Instead they opt to use pork, and pork ribs especially, as an indulgent, supplemental protein in a variety of dishes. In addition to its versatility, Latinos also lean toward pork ribs because it's an accessible, inexpensive and flavorful cut.

A typical Hispanic recipe that includes ribs is a pork rib stew. This dish is common in Hispanic Caribbean culture and includes any number of desired vegetables. The pork ribs are slow cooked for hours in the stew, resulting in a comfort food dish that non-Hispanics in the United States might associate with the traditional chicken noodle soup.

PORK RIBS - MUTUAL TERRITORY

PERCEPTION	HISPANIC	NON-HISPANIC
TASTES DELICIOUS	47%	50%
FUN TO EAT	29%	32%
MAKES MY FAMILY HAPPY	26%	28%

Mutual territories are perceptions with less than +/- 5% difference between Hispanic and Non-Hispanic.

PORK RIBS - DIFFERENCES

PERCEPTION	HISPANIC	NON-HISPANIC
INDULGENT	30%	22%
INEXPENSIVE	22%	10%
VERSATILE (USED IN MANY WAYS)	21%	9%

Differences are perceptions with greater than +/- 5% difference between Hispanic and Non-Hispanic.



Costillas de Cerdo Adobadas Chuquiabambino

PORK CHOPS: HOW THEY'RE CUT MAKES ALL THE DIFFERENCE

Chops are a cut Hispanics desire but often don't find exactly as they would like at retail. This may be why Hispanics are less likely than non-Hispanics to say chops are easy to pair with different seasonings, a good value for the money, able to be used in many ways and a good source of protein.

For Latinos, cut thickness, type and preparation are key factors. When it comes to the thickness of chops, Hispanics typically prefer a thinner cut than non-Hispanics – likely because they cook faster and it's easier to tell when they're cooked properly. Providing both standard cut and thinner cut options in the meat case can help retailers appeal more to Hispanic consumers.

Thinly cut pork chops can be simply seasoned with cumin and paprika (commonly known in Hispanic culture as pimenton y comino) and pan seared to accompany many traditional Hispanic side dishes, such as rice, plantains and avocado salad.

A common Colombian-style of preparing pork chops includes a marinade of lime juice, onion powder, freshly crushed garlic cloves, ground thyme, dried oregano and ground cumin. In this case, the chops are marinated overnight and then cooked in water before being transferred to a stove top pan for light searing. These chops are traditionally served with rice and red beans and pork rinds (or chicharrón).

Like thinly cut chops, the "chuleta Kan Kan," which originated in Puerto Rico, is not easily accessible in the United States. The chops are seasoned, then typically deep fried or grilled, and features crispy skin.

PORK CHOPS - MUTUAL TERRITORY

PERCEPTION	HISPANIC	NON-HISPANIC
QUICK TO PREPARE	27%	26%
INEXPENSIVE	25%	28%

Mutual territories are perceptions with less than +/- 5% difference between Hispanic and Non-Hispanic.

PORK CHOPS - DIFFERENCES

PERCEPTION	HISPANIC	NON-HISPANIC
SOMETHING I CRAVE	17%	11%
A LOT OF THIS MEAT WHERE I SHOP	8%	16%

Differences are perceptions with greater than +/- 5% difference between Hispanic and Non-Hispanic.



PORK TENDERLOIN: A GROWTH OPPORTUNITY

There's a more sizable opportunity gap for pork tenderloin than other cuts. Hispanics would like to buy more pork tenderloin in the future - we just have to offer them more reasons to do so. One way to do this is to emphasize tenderloin's health benefits, especially its low fat, high protein content.

As they currently stand, Hispanics are less likely than non-Hispanics to see pork tenderloin as a cut that tastes delicious, goes well with different seasonings, is easy to pair, is a good value for the money, leaves them always satisfied, is filling/hearty, is a good comfort food or they don't have to give much thought.

Opportunities to increase Hispanic consumption of pork lie in the seasoning and preparation of the tenderloin. Offering pre-marinated pork tenderloin, but with flavors that are traditional to Hispanics, is a good starting point. Simple "how to prepare" labeling on pork packaging can orient shoppers when making their protein selection.

An option for Hispanic-appealing seasoning is all-purpose adobo, which is generally comprised of black pepper, onion powder, garlic powder, paprika, dried oregano, cumin powder and chili powder. Hispanics may consider experimenting with tenderloin if it's paired with these familiar flavors traditionally seen with other pork cuts. Retailers and packers should show them how they can get the flavor they seek from other cuts, but with the health benefits of tenderloin.

PORK TENDERLOIN - MUTUAL TERRITORY

PERCEPTION	HISPANIC	NON-HISPANIC
EASY TO PREPARE	26%	30%
CONCERNED ABOUT UNDERCOOKING	22%	18%
MAKES MY FAMILY HAPPY	16%	17%

Mutual territories are perceptions with less than +/- 5% difference between Hispanic and Non-Hispanic.

PORK TENDERLOIN - DIFFERENCES

PERCEPTION	HISPANIC	NON-HISPANIC
FUN TO EAT	18%	11%
NOT COMMONLY FOUND ON MENUS	15%	22%
GOOD VALUE FOR THE MONEY	13%	30%

Differences are perceptions with greater than +/- 5% difference between Hispanic and Non-Hispanic.



PORK ROAST: OPPORTUNITY FOR VALUE AND VARIETY

Hispanic consumers rate pork roast (including loins and shoulders) highly for its taste, convenience and variety. A traditional use of the pork shoulder roast (more commonly known among Hispanics as the pernil) includes a whole pernil roast marinated overnight with mojo criollo. The pork roast can then be served as an accompaniment to many other Hispanic dish items, as the star ingredient in a sandwich, in the aforementioned traditional Mexican pork tamales or shredded for carnitas. Pernil can use a roast from the shoulder or leg, however fresh leg is another cut that's not readily available in many mainstream grocery stores.

Roasts from the loin are widely available and offer an opportunity to market a low fat alternative to Hispanics. Loin roasts can be cubed and used on skewers or in stews.

While Hispanic consumers already know and love pork roast, highlighting its role in these traditional Latino dishes at retail can appeal to both Hispanic and non-Hispanic consumers.

PORK ROAST (INCLUDING LOINS AND SHOULDERS) - MUTUAL TERRITORY

PERCEPTION	HISPANIC	NON-HISPANIC
TASTES DELICIOUS*	34%	42%
GOOD COMFORT FOOD	30%	26%
EASY TO PREPARE	26%	30%

Mutual territories are perceptions with less than +/- 5% difference between Hispanic and Non-Hispanic.

*This mutual territory exceeds a +/- 5% different because it was a top perception for both segments.

PORK ROAST (INCLUDING LOINS AND SHOULDERS) - DIFFERENCES

PERCEPTION	HISPANIC	NON-HISPANIC
FUN TO EAT	18%	10%
QUICK TO PREPARE	16%	10%
FEATURED IN RECIPES I WANT TO TRY	14%	6%

Differences are perceptions with greater than +/- 5% difference between Hispanic and Non-Hispanic.



IMPLICATIONS AND OPPORTUNITIES

PACKAGING OPPORTUNITIES

- Include messaging around common uses for cuts in Latino dishes on pack to appeal to Hispanic consumers and inspire new recipe trial among non-Hispanics.
- Provide thickness and cut options, such as thinly sliced chops, Kan Kan chops and pre-cut ribs. Thinner cuts can appeal to both Hispanic and non-Hispanic shoppers.
- Offer pre-packaged kits that cater to common Hispanic dishes, such as montaditos kits (Spanish small sandwiches) or torta kits (Mexican sandwiches).
- Provide pre-packaged, pre-seasoned cuts for retailers to use for Latino-inspired hot bar dishes, as well as smaller versions for consumers to prepare at home.

RETAIL OPPORTUNITIES

- Provide chops in varied thicknesses to appeal to Hispanic consumers who want thinner options.
- Provide a wider variety of cuts Hispanics crave and ensure the offerings are consistent. For example, provide large cuts, like pork roast shoulder, year-round to appeal to Hispanics who use it as an ingredient rather than a main course.
- If meat case space is an issue, provide messaging around the various cuts available at the butcher that appeal to Hispanics, such as Kan Kan pork chops and pre-cut ribs.
- Co-merchandise or cross-promote pork cuts with the seasonings and sides they often accompany in popular Hispanic dishes to appeal to Hispanic shoppers and entice recipe trial among non-Hispanics.



Lomo Saltado con Arroz Blanco

HEALTH: A BARRIER AND AN OPPORTUNITY



Ensalada de Cerdo Asada al Chipotle

Fresh pork is likely to be an option in the typical Hispanic fridge. There, you may find fresh pork chops – a great option for chuletas en salsa verde over rice. A dinner like this provides a healthful comfort food, and very thinly sliced pork chops browned in a pan are its star. In fact, they may have had to ask the butcher to slice the chops extra thin for a recipe like this.

For many Hispanics, eating healthy is important most of the time. About 90% of first generation Hispanics, 82% of Millennials and 80% of second generation Hispanics agree that “When I cook dinner, it is important that it be healthy.”²⁹ Yet, many Hispanics also like to give into their cravings now and then.³⁰ They believe that “not-so-healthy” meals pose no harm in moderation.³¹ A flexible approach to diet is important to Hispanics³² – almost 4 in 10 Hispanics consider that their diet is a mix of healthy and not-so-healthy foods.³³ They want healthful dishes that don’t sacrifice richness in flavor.³⁴

Although they vary in how they define “healthy eating,”³⁵ most Hispanics associate freshness with food quality and health.³⁶ In fact, 62% of Hispanics agree that “healthy means fresh to me,”³⁷ and don’t worry too much about calories and fat content.³⁸

As Hispanics grow roots in the United States, they naturally pick up views that are common in the mainstream culture. One of those views, unfortunately, is that pork is not a healthy food. Among those Latinos who do not see themselves consuming more pork in the future, more than half cite health and food safety concerns as a reason.

Health concerns about pork are notably higher among Latinos than they are among non-Hispanics. While 12% of non-Hispanics consider pork a quick, healthy meal, only 9% of Hispanics agree. Similarly, while 11% of non-Hispanics view pork as a healthy family favorite, only 8% of Hispanics view pork this way.

Combating health barriers among Latinos is vital to increasing consumption. To do so, we need to understand the main drivers of Hispanics’ perceptions of pork’s health: nutrition, safety, claims and animal welfare.

NUTRITION AND SAFETY

Most often, when Hispanics' worry about health they worry about their weight and heart health – concerns consistent regardless of acculturation levels and countries of origin.

Reading nutrition labels, eating fresh food and spending more for natural and organic foods is popular with 32% of acculturated Hispanic meat buyers and 42% of bicultural Hispanic meat buyers. Likewise, 17% of acculturated Hispanic meat buyers and 25% of bicultural Hispanic meat buyers have a tendency to diet and manage calories.

Unfortunately, only a minority of Hispanics considers pork to be a more healthful option than other red meats.

To dispel this myth, we need to clearly communicate pork's nutrition profile to Latinos. The American Heart Association (AHA) has designated certain lean cuts, such as pork tenderloin and sirloin, as a heart-healthy protein.³⁹ Both of these cuts meet the AHA's requirements for its Heart-Check Food Certification Program.

Eight common cuts of pork are leaner than they were 20 years ago – the pork industry's response to consumers' desire for lean pork products. Through pork farmers' efforts in feeding and management practices, "Great 8" cuts of pork have, on average, 16% less fat and 27% less saturated fat than 20 years ago.⁴⁰

Consumers need to know that these pork cuts meet the USDA guidelines for "lean," with less than 10 grams fat, 4.5 grams saturated fat and 95 milligrams of cholesterol per serving. Any cuts from the loin – like pork chops and pork roast – are leaner than skinless chicken thigh, according to USDA data. Pork steaks or roasts from the leg (fresh ham) are also lean choices.^{41,42}

8 CUTS OF PORK HAVE

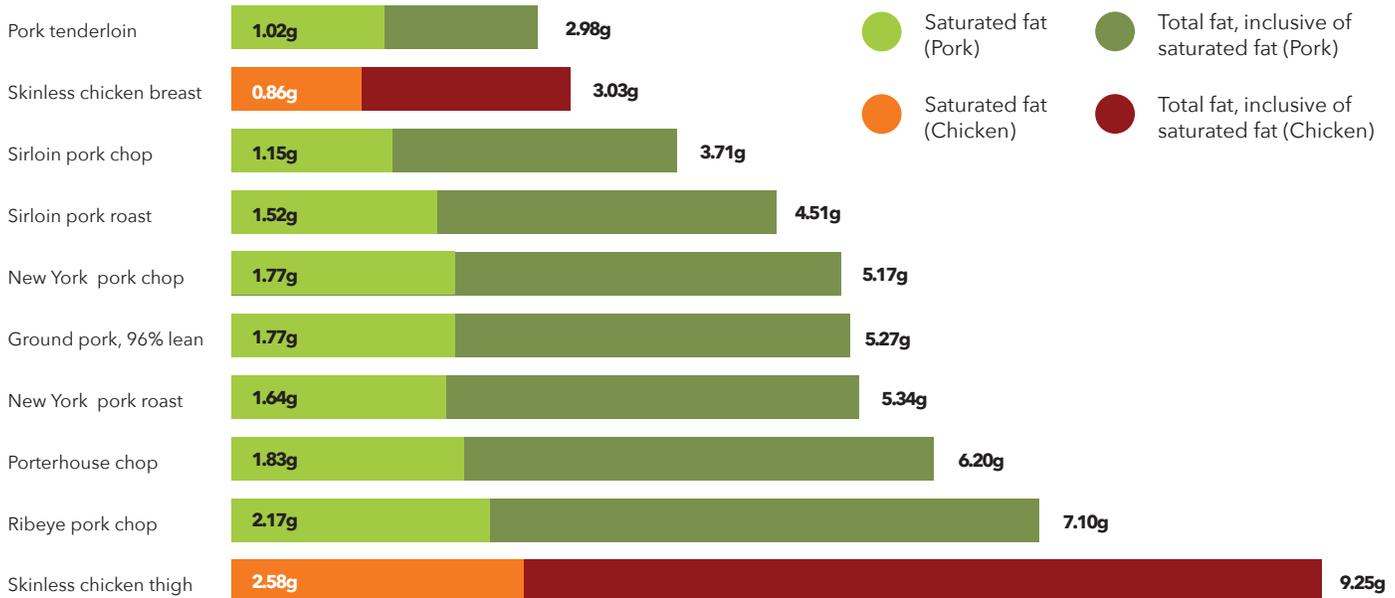


16% LESS FAT

27% LESS SATURATED FAT

THAN 20 YEARS AGO

PORK'S GREAT 8



In addition to nutritional concerns, Hispanics also worry about undercooked pork. This may lead them to overcook it, resulting in dry meat. Pork's temperature spectrum is similar to beef steak – and it's actually lower than poultry and ground meats. Like other fresh meat steaks, chops and roasts, pork should be cooked to 145°F, followed by a three-minute rest.⁴³ Through packaging and in-store signage, we need to better inform consumers – Hispanics and non-Hispanics alike – on proper cooking temperatures.

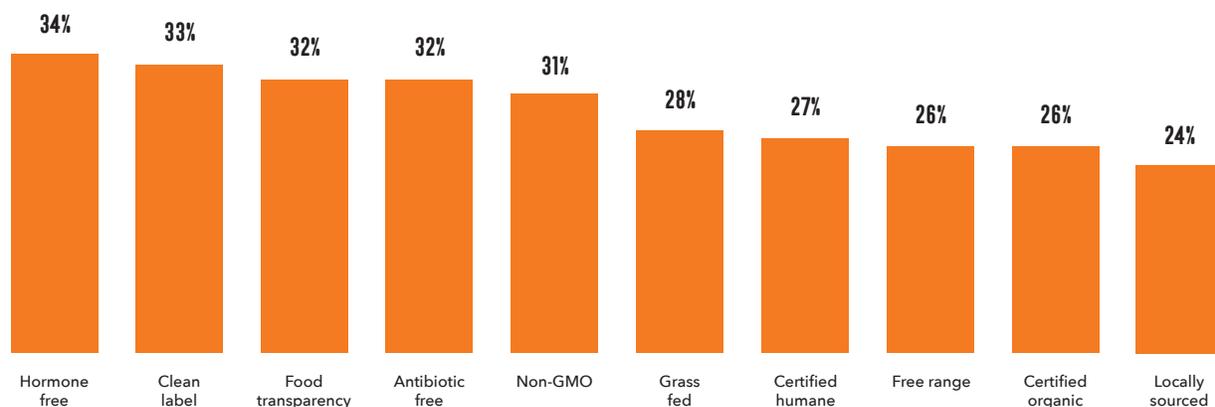
CLAIMS AND ANIMAL WELFARE

Hispanic consumers are more likely than non-Hispanics to place importance on certified humane, non-GMO and certified organic in their meat purchasing decisions. Label claims and concerns about animal welfare are increasingly important for all consumers, but especially for Latinos.

Unfortunately, packaging labels are not yet one of pork's strong points. Latinos say pork packaging often lacks label claims, offers limited pork branding, lacks innovation and shows inconsistent meat color that creates confusion. Both unacculturated and bicultural Hispanics pay attention to packaging and merchandising, with bicultural Hispanics more likely to call out pork's deficiencies. This suggests that pork is at a disadvantage compared to chicken and beef marketing and packaging.

Because Hispanics are also more willing than non-Hispanics to pay more for proteins with certain health claims, the lack of strong labelling leaves money on the table.

TOP 10 LABEL CLAIMS HISPANICS ARE WILLING TO PAY MORE FOR



Source: The National Pork Board, 2019

Organic and other health features are top of mind for many Latino customers. Hispanics are significantly more committed to buying certified organic than are non-Hispanics because they see it as healthier and fresher. This is especially true of bicultural and unacculturated Hispanics.⁴⁴

In addition to claims about a product's status as organic and free of hormones and antibiotics, Hispanics worry about how animals are treated and raised. Across all generations of Hispanics, pork welfare is a factor in how much pork they buy. Specifically, the majority say the cleanliness of pigs, what pigs are fed and how pigs are raised are factors in how much pork they buy.

Perhaps surprisingly, concern about animal welfare increases as consumers age. How pigs are raised influences purchasing decisions of:



of 18 to 34-year-olds



of 35 to 54-year-olds



of those 55 and older

The pork industry's concern about animal welfare is a story that the National Pork Board and its stakeholders need to tell consumers to assuage their concerns. Through the industry's We Care initiative, pork farmers have long been committed to animal welfare, sustainability and continuous improvement. In recent years, the industry has supported significant efforts to find solutions that are humane and viable to implement, such as researching and evaluating animal care and welfare standards. It has invested more than \$1.37 million into swine-housing research and \$3.13 million in general research to improve animal well-being over the last decade. In 2014, the pork industry adopted standards for a Common Swine Industry Audit to assess improvements among farmers and processors in animal well-being and food safety. For example, most pork producers are publicly committed to protect and promote animal well-being and must go through an extensive assessment and certification process that examines a wide range of factors related to how pigs are housed and treated.

These messages can be brought to life on in-store displays, in circulars, on packaging and on store social media feeds. Pork should be regularly promoted as a sustainable option, and packers and retailers should leverage the data that proves it.

By applying the six We Care principles, the pork industry works with its stakeholders to build trust and confidence among customers and the public. Helping consumers understand these efforts is key to increasing pork's appeal for not only Hispanic consumers, but all consumers.

WE CARE™ 6 PRINCIPLES



Food Safety



Animal Well-being



Public Health



Environment



Our People



Community

IMPLICATIONS AND OPPORTUNITIES

PACKAGING OPPORTUNITIES

- Include AHA Certified Heart healthy logo on packages of all certified cuts and include bilingual messaging.
- Include the Great 8 logo on the packages of all corresponding cuts and include both Spanish and English messaging.
- Include Spanish and English claims information on pack for all applicable products.

RETAIL OPPORTUNITIES

- Include Spanish and English signage in the meat department with information about pork's AHA certifications and Great 8 cuts.
- Request that meat suppliers meet specific claims (e.g., certified organic, certified humane, etc.) and include appropriate in-store messaging in English and Spanish.
- Include Spanish and English signage about pork's We Care initiative to increase all consumers' consideration of the protein while reinforcing the retailers' commitment to animal welfare and sustainability.
- Work with retail-level or local dieticians to develop talking points around pork and healthy eating.

AUTHENTICITY: FLAVORS, BEHAVIORS AND ORIGINS



Chuletas de Cerdo Al Pastor con Salsa de Piña

Making authentic dishes that have been passed down from generation to generation isn't easy to do for Hispanic consumers shopping at mainstream grocery stores. It can be hard to find the ingredients for favorites like mofongo (made from fried green plantains) and chicharrón. Meanwhile, for pernil or roasted pork shoulder, a Christmas favorite, it is critical to have the skin on the cut and the right seasonings.

Knowing what Hispanics think of pork cuts and how they choose to serve them, how do we make sure pork is on the grocery list and in their home refrigerator or freezer? By reinforcing pork's role in authentic Latin cuisine. Hispanics want to stay connected to their culture, tradition and roots, and food is a primary way to do that. But it's important to understand how those traditions, and pork's role in authentic cuisine, vary based on country of origin – whether it is Puerto Rico, Mexico, Cuba, Peru or another Hispanic country.

Catering to Hispanics in an authentic way means providing options that resonate with the various regional groups within the Latino audience, options that will fit the tastes and flavor profiles from their backgrounds. The better we understand their cultural nuances, differences based on country of origin, geography within the United States, age and other demographics, the better we can attract them to pork by offering authentic options.

SPICE IT UP: TRADITIONAL HISPANIC INGREDIENTS



PEPPERS:

jalapeño
cayenne
habanero
aji amarillo
chipotle
piquillo chiles



SPICES:

cilantro
cumin
paprika
adobo
sazon completa
chile pepper



CITRUS:

lemon
lime
bitter orange



SAUCES:

mojo criollo,
guava and other
fruit-based
sauces (mango,
pineapple)



ONIONS:

red
white
pickled

THE IMPORTANCE OF AUTHENTICITY

There is growing interest among bicultural and unacculturated Hispanics to stay connected to their culinary roots and traditional recipes. The pork industry needs nuanced thinking about the needs of Hispanics and to customize messaging and marketing efforts to various Hispanic groups - one size does not fit all.

For example, Hispanics differ from non-Hispanics at mealtime. Compared to non-Hispanics, Latinos care more about making sure everyone in the family eats the chosen dish and are less likely to need a "quick" meal. While both Hispanics and non-Hispanics want ease, simplicity and flavor when it comes to in-home meal occasions, Hispanics serve fresh pork when it appeals to their impulsiveness, cravings, need to indulge and desire for fun.

Meanwhile, it's important to know when Hispanics eat pork during the day, especially fresh pork. Latinos are more likely than non-Hispanics to eat fresh pork at lunch (7% Hispanic versus 4% non-Hispanic), a trend especially true among unacculturated Hispanic (13%). For retailers, this could be an opportunity to offer popular hot bar dishes featuring fresh pork, such as carnitas or tacos al pastor. At dinner, Hispanics and non-Hispanics serve fresh pork about the same (8% each). Again, unacculturated Hispanics (11%) drive fresh pork usage.



CULTURE IS NOT ONE-SIZE-FITS-ALL

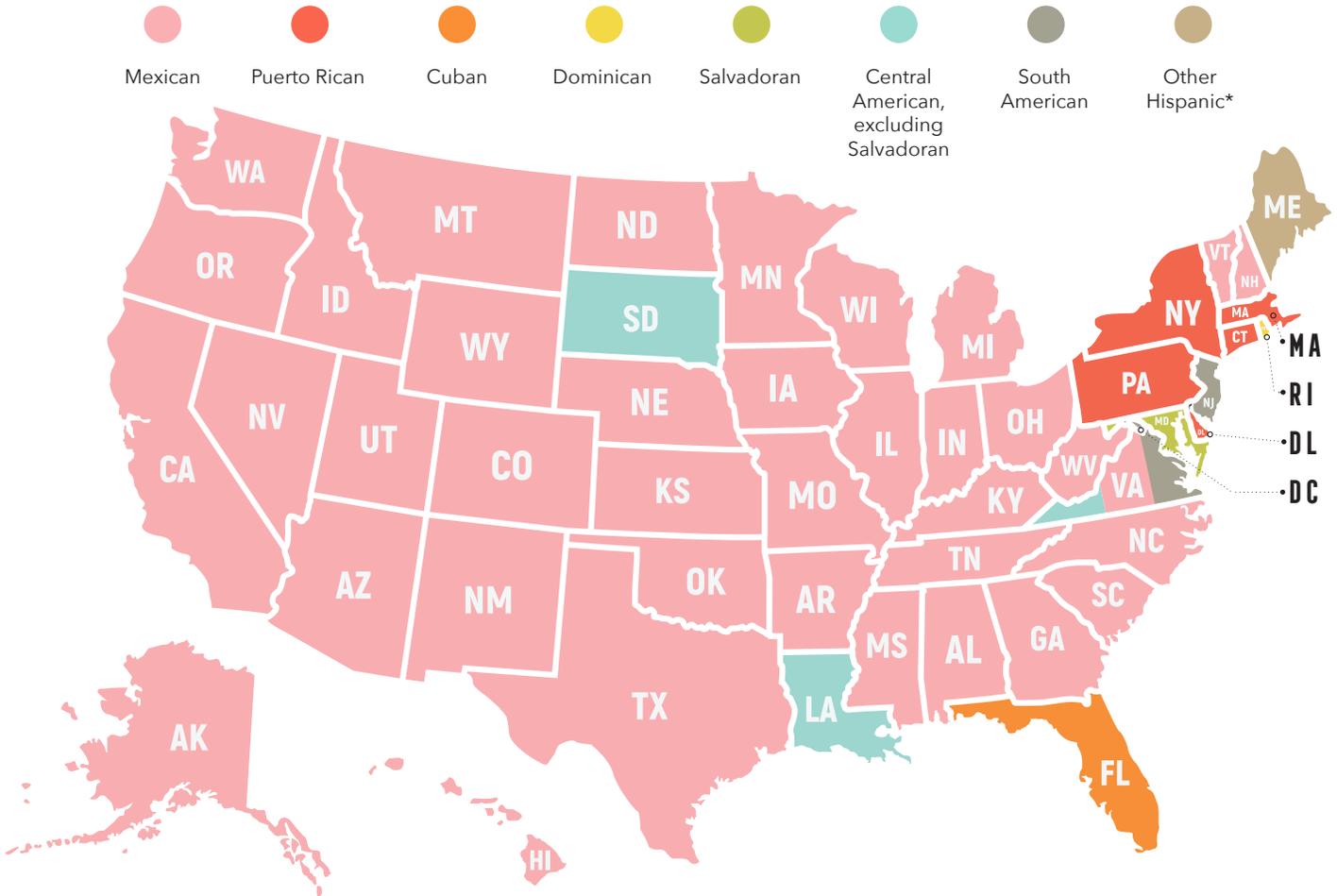
All too often, retailers and packers tend to lean toward Mexican cuisine when thinking of Hispanic dishes. While two out of three Hispanics in the United States are from Mexico (67%), the remaining third of the U.S. Hispanic population is originally from other nations. The areas most represented, in order of size, are Puerto Rico, Cuba, El Salvador, Dominican Republic, Guatemala and Colombia.⁴⁵ It's critical that packers and retailers understand how many Latinos live in their local region and where they or their ancestors came from.

Love for pork also varies among Latinos. Those originally from Mexico and the Caribbean eat pork more often and consider it a staple in their weekly menus. Pork is often central to their recipes. Those from Central America, on the other hand, eat pork less frequently and are more likely to use it as a way to enhance flavor or as a component in a dish, rather than a main feature.

Understanding the cultural nuances within Hispanic culture, especially as it applies to food, is important. For example, chuletas Kan Kan (Kan Kan pork chops) - deep-fried or grilled pork chop with rib meat, belly and skin still attached - is a Puerto Rican dish. Hispanics of different regions and nationalities have their version of this same dish with a different name.

Even though there may be variations, love for pork is consistent across Hispanic cultures, and offering a variety of pork recipes and preparations can be an effective way to enhance and even spread that love of pork. By encouraging cross-cultural or cross-tradition influences, retailers and packers can help Hispanics find even more ways to fit pork into their menus.

PREDOMINANT HISPANIC POPULATION BY STATE



Source: U.S. Census Bureau, current population survey projections
 *This category includes people who responded "Hispanic," "Latino," or provided other general terms.

IMPLICATIONS AND OPPORTUNITIES

PACKAGING OPPORTUNITIES

- Offer pre-packaged starter meal kits that provide the key ingredients needed for popular Latin pork dishes, while allowing room for cooks to add their own culture's unique spices.
- Include on-pack messaging about using leftovers for quick, easy lunches.
- Offer products that can bring real, authentic flavors, such as cooking sauces, marinades, rubs and mixes of spices.

RETAIL OPPORTUNITIES

- Provide meal-kit assembly stations in the meat department, allowing consumers to pick the meat, rubs, spices and sauces they want.
- Offer hot bar Latin dishes that reflect the most common Hispanic countries of origin in the store's region.
- Offer quick, popular fresh pork options in the hot bar during lunch, such as carnitas and tacos al pastor.
- In areas with many different Hispanic nationalities, authenticity to the country of origin is critical. Offer bilingual signage and highlight Hispanic pork dishes and cuts using the terminology most common among the area's Hispanic demographic.
- Activate in the community to show Hispanics you care about them and the community beyond sales.

COMO SE LLAMA? WHAT DO YOU CALL IT?

The Spanish names for pork and pork dishes vary by country of origin, region and culture. The following chart, while not all-inclusive, provides examples of Spanish names for pork and pork dishes, with country of origin noted.

NAME OF CUT (TRADITIONAL/ AMERICAN)	NAME OF CUT IN SPANISH, BY COUNTRY OF ORIGIN*	USED FOR... *	KEY NEEDS & THOUGHT STARTERS FOR PACKERS AND RETAILERS
Shoulder, butt and picnic	<ul style="list-style-type: none"> Paleta de cerdo (Cuban) Pernil (Puerto Rican) Hombro de cerdo (Mexican) 	<ul style="list-style-type: none"> Paleta (Cuban) Carnitas (Mexican) Tamales (Mexican) Pasteles de cerdo (Puerto Rican) 	<ul style="list-style-type: none"> Offer with skin on
Chop	<ul style="list-style-type: none"> Chuleta (Various) 	<ul style="list-style-type: none"> Chuletas Kan Kan con arroz mamposteo (Puerto Rican) Chuletas a la jardinera con arroz blanco y amarillitos (Puerto Rican) Chuletas rellenas de cerdo (Mexican) 	<ul style="list-style-type: none"> Thinner cuts Offer the Kan Kan cut, which includes the loin chop, rib meat, belly and skin
Fresh leg or fresh ham	<ul style="list-style-type: none"> Pierna de cerdo (Leg Steak) (Mexican) 	<ul style="list-style-type: none"> Torta de milanesa Al Pastor (Mexican) 	<ul style="list-style-type: none"> Offer fresh (non-cured) legs
Ribs	<ul style="list-style-type: none"> Costillas de puerco (Mexican) 	<ul style="list-style-type: none"> Pork rib stew (Various) Parrilladas (Mexican) 	<ul style="list-style-type: none"> Offer pre-cut to use as an ingredient rather than center of plate
Loin	<ul style="list-style-type: none"> Lomo (Various) Lomo de cerdo (Mexican) 	<ul style="list-style-type: none"> Carne frita con mofongo (Puerto Rican) Pinchos de cerdo con pan y tostones (Puerto Rican) Adobado al horno (Mexican) 	<ul style="list-style-type: none"> Offer pre-cut chunks Offer pre-skewered chunks
Suckling pig	<ul style="list-style-type: none"> Lechón asado (Various) 	<ul style="list-style-type: none"> Lechón asado (Puerto Rican, Cuban) 	<ul style="list-style-type: none"> Provide availability at retail or through special order

4 WAYS TO CATER TO LATINO SHOPPERS IN YOUR REGION

As all retailers know, effective marketing comes down to understanding your local demographics. Consumers in different regions, and even different areas of the same city, have different needs and expectations at retail. Understanding those unique needs and expectations is the key to success at the local level.

This is especially true for Hispanic marketing. The demographics of different regions necessitate different marketing strategies. While most Hispanics have an affinity for pork, those of Cuban descent in south Florida want different pork products than those of Mexican descent in Texas, or those of Puerto Rican descent in the northeast. And their usage of those pork cuts differ, too.

That's where a national wholesaler has a unique lens. Working with different retailers across the country, a national wholesaler can see the trends and tactics that work in different local markets. To learn more, we spoke with a national wholesaler to get their unique perspective on how the retailers they work with cater to the Latino shoppers in their region. Here are four things we learned:

1. **Don't Push Products, Listen to Desires:**

Best-selling pork cuts tend to vary by geography, so it's critical for retailers to understand the local Hispanic population and cater products specifically to them. In the northeast, with its higher Dominican and Puerto Rican population, that means picnics, bellies, loins and spare ribs, as well as fresh hams around the holidays. In Texas, boneless butts are key year-round, but whole hogs, and picnics, butts and legs for tamales, are key around the holidays. Retailers also have an opportunity to promote the dishes that are popular in their regions, such as tamales and tacos al pastor. These dishes, in particular, tend to be popular among non-Hispanics in regions with higher Hispanic populations. As a result, they're likely to grow in popularity nationally over time.

2. **The Entire In-Store Experience Matters:**

The grocers that understand how to market to Latinos throughout the store see more traffic. From a fresh bakery with Latino baked goods, to providing masa in bulk for tamales, to a full-service taqueria with fresh made tortillas available all day, the stores that provide an integrated, highly visual experience benefit the most.

3. **Understand that Eating is an Event:**

Hispanic-focused retailers understand that meals are important in Hispanic culture. A Sunday dinner may include the parents, kids, grandparents, and aunt and uncles. Retailers should tap into this tradition and ensure they're providing the right cuts at the right time to cater to these dinners, such as promoting shoulders and fresh legs on weekends.

4. **Decisions are Often Made Day-of:**

While the preferred cuts and flavors vary across specific ethnicities, the broader Hispanic population has a natural affinity for pork unlike any other demographic. Therefore, the question isn't if they'll buy pork, but where. Often, they'll shop around and purchase at the location that offers the best value on the specific cut they want that day. In some cases, this even means buying their shoulder on Thanksgiving Day, for example. To get the sale, retailers need to ensure they have enough of the right cuts to meet the demand, and they have the most competitive prices.

LOOKING AHEAD



Torta de Milanesa

With \$95 billion in consumer packaged goods buying power, Hispanic consumers are too powerful to ignore. And as we've shown throughout this report, they love pork and connect to culture through pork. The next step is for retailers and packers to adapt. We've offered thought starters and ways to engage this community throughout this report, but there are many more ideas we're eager to share.

Over the coming weeks, we'll continue to delve deeper into our research and supplemental topics about Hispanic consumers, such as how and why they shop at bodegas and ethnic markets, what their dining out habits look like, and how acculturation impacts behaviors, geography and protein preferences.

In addition, we will weave our multicultural marketing insights into everything we do. Retailers can't expect to capture the Latino market by offering one "ethnic foods" aisle. Instead, they need to think about the Latino market holistically and determine how to meet their needs across all areas of the store. Likewise, the National Pork Board and our Insight to Action program can't treat this report

like a one-and-done on multicultural marketing. We need to apply a multicultural consumer lens to every topic we cover – from Gen Z to sustainability to C-store trends.

Since we launched the Insight to Action program with our *Dinner at Home in America* report in January, we've covered a wide breadth of research and topics that provide never-before-seen insights on eating habits. We've heard from many of you – from packers to retailers to foodservice professionals – about what you've found valuable, and what you'd like to learn more about. We're excited to kick off 2020 with more insights and ideas for innovation.

As we've shown through all our reports this year, the food industry is changing at a breakneck pace; foresight and adaptability are the keys to survival. In 2020 and beyond, we will continue to provide insights into the markets, occasions and behaviors that shape consumers' dining habits, and then drive action to adapt. From Insight to Action, we can be the disruptors, guiding the future of the industry.

RESEARCH METHODOLOGY

Three 15-minute modular online surveys were fielded between March 27 and April 29, 2018 and again between August 10 and September 20, 2018.

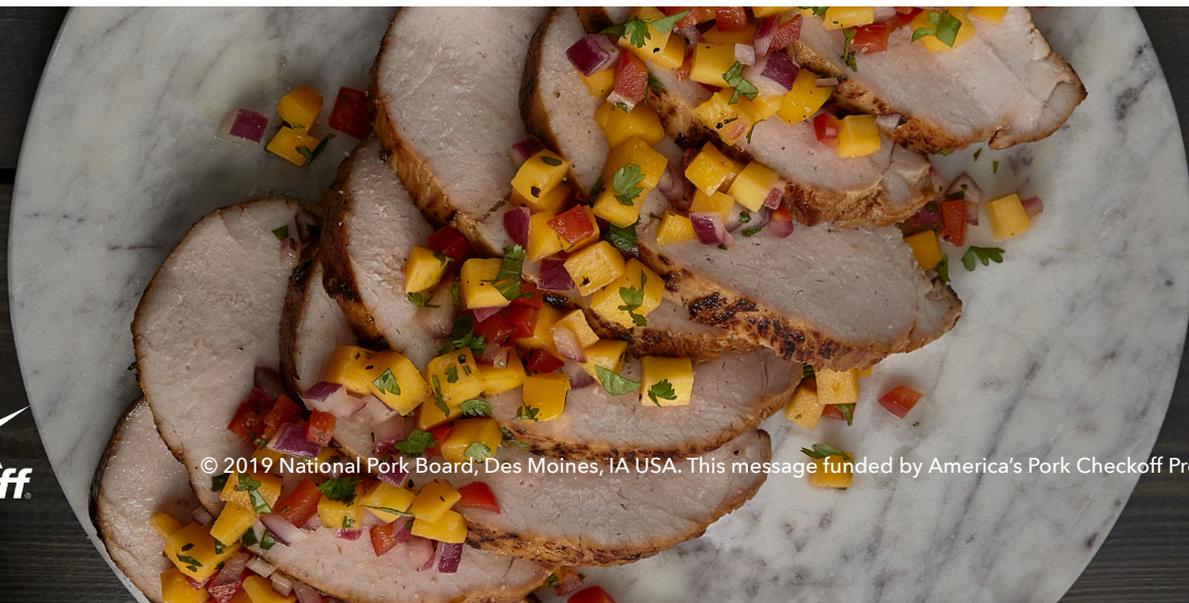
- In the first fielding of the surveys, 10,163 interviews were collected among panelists in Numerator's InfoScout Omnipanel. These surveys were fielded in English-only.
- In the second field period, an additional 952 interviews were collected among panelists from Offerwise's U.S. Hispanic panel. These surveys were fielded in both English and Spanish, and all of the respondents identified as Hispanic/Latino.
- The total ending sample size is 11,115 U.S. meat consumers including:
 - 9,086 Non-Hispanic, and
 - 2,029 Hispanic
- In order to participate in this research, all respondents were required to meet the following criteria:
 - Males/Females age 18+ residing in the U.S.
 - Personally eats meat
 - Has at least some influence in buying or preparing food for the household

The subject of each modular survey was:

- Module 1 Survey: in-home meat consumption
- Module 2 Survey: out-of-home meat consumption
- Module 3 Survey: personal attitudes about meat; personal food/health/nutrition attitudes; and awareness/engagement in contemporary food, diet and nutrition trends
- Certain data (such as demographic measures) were obtained from InfoScout's or Offerwise's panelist profiling databases; all other data was obtained through the surveys, except for retail spending on meat (Module 1) which were obtained using InfoScout's receipt database.
- While consumers may have purchased/eaten multiple meats, they were assigned one meat to evaluate for the occasion-based questions based on recency:
 - For Module 1, they evaluated the meat they have eaten most recently at home in the past two weeks.
 - For Module 2, they evaluated the meat they have eaten most recently away from home in the past month.

Qualitative Research Methodology

- General Objective: To explore and unearth Hispanics' views and perceptions of pork, their motivations and drivers of consumption as well as the surrounding challenges and barriers. Mix of Qualitative methodologies: Focus Groups and In-depth interviews
- 10 focus groups
- 5 In-home Interviews
- 5 In-home Interviews + Shop-Along
- 7 In-home Interviews + Dine-Along
- Markets:
 - Chicago
 - Los Angeles
 - Dallas
 - Phoenix
 - New York
- Participants:
 - Hispanics, mix of foreign and U.S.-born.
 - Mix of Unacculturated and Bicultural



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