

## Incremental Innovation and Value Addition in SMES Operating as Retailers in the Meat Sector

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### Abstract

**Purpose:** This article aims to demonstrate that introducing specialized technical meat cuts can serve as a driver of incremental innovation in small retail marketing stores.

**Methodology:** Exploratory interviews were conducted with entrepreneurs in the sector. Consumer profiling was carried out through a convenience survey, resulting in 286 validated responses, which were analyzed using descriptive and multivariate statistical methods. The survey of prices for technical meat cuts was conducted online across four supermarket chains and traditional butcher shops. In addition, a detailed literature review was undertaken.

**Findings:** The comparative analysis of technical meat cuts in animals such as pork and beef revealed that these cuts are less detailed in Portugal than in other countries. Through cluster analysis, four behavioral groups were identified. Overall, consumers recognized technical cuts originating from Spain in Iberian pork (88,8%) and from Brazil in beef cuts for barbecue (82,2%), while awareness of international cuts made in the USA was considerably lower (18,9%). Retail price analysis indicates that the adoption of technical cuts adds value and enables targeting more sophisticated consumer segments. The findings suggest the existence of a market opportunity in the presentation of technical meat cuts, representing an incremental innovation for small retail businesses.

**Limitations:** The study was limited to southern Portugal, so it is recommended that future research be extended to the entire country.

**Originality:** Research has shown that there is a significant lack of work in this area in Portugal.

**KeyWords:** commercialization; cuts; meat; innovation; SME.

Article categorization: Research Paper

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## 1. Introduction

The research presented in this article is based on a customer visit to a small meat trading company located in a town in the Algarve, southern Portugal. The butcher shop in question is locally renowned and experiences high demand. During the visit, a customer - an expatriate resident - made an unusual request: "I want eight Tomahawks!" The employee, unfamiliar with the request, consulted with colleagues and, after searching online, discovered that it referred to a specific technical cut of beef. He then informed the customer that only traditional cuts were available and that the closest option would be a beef rib. The customer thanked him but left without making a purchase.

The product in question is one of the specialized technical cuts originating from the USA. It is a staple in barbecue dishes (along with other cuts such as the T-bone), known for its visual appeal and commonly featured in steakhouses.

We then posed the question of whether offering meat products with specialized technical cuts could represent an incremental innovation for traditional establishments targeting emerging customer segments. In this context, it is worth noting the study on innovation in food sector SMEs by Baregheh *et al.* (2012), conducted in the United Kingdom, which states that these businesses tend to favor incremental and progressive innovation over radical and disruptive approaches. This concept forms the core of our research.

Furthermore, the Algarve is a peripheral region, widely recognized for its productive specialization in tourism. However, a closer examination of statistical data (INE, 2023) reveals specific characteristics of its business environment: 96.8% of companies have fewer than 10 employees and can be classified as micro-enterprises; the average number of employees per company is 2.38; the average revenue per company is €150,400, compared to the national average of €364,400. Apparent labor productivity is the lowest among all Portuguese regions, at €23,050, versus €31,250 nationally.

Therefore, we believe it is important to develop studies that enhance the added value of production in the region - an approach also applicable to other areas where micro and small businesses predominate. One such example is the incremental innovation proposal presented in this article.

## 2. Theoretical Basis

Innovation is considered a key element in the strategic management of companies competing in the market (Drucker, 1994; Sipa, 2017). It should be incremental, based on trial and error, and lead to clear outcomes (Drucker, 1997; Al-Khatib et al., 2022). The objective is to achieve or maintain competitive advantages (Fagerberg, 2005; Distamont, 2020) that enable market presence from a value-adding perspective. According to Porter (1996), "in terms of competitive advantages, a company can outperform its rivals only if it can establish a sustainable difference. To this end, the company must seek to deliver value to the customer in a differentiated way, create value for the company at the lowest cost, or do both."

Given its impact, innovation can be classified a radical when it causes a break with what preceded it - such as in the case of revolutionary innovations or creative destruction (Schumpeter, 1934; Souto, 2015; Colombo et al., 2017) - and **incremental** when it leads to an upgrade or an improvement over existing solutions (Ettlie et al., 1984; Rubin et al., 2018).

According to Gupta (2008), innovation must originate from a structural process within the company - a routine search for knowledge to be transformed into applied products and services - rather than an ad hoc discovery. This perspective is also supported by Bigliardi (2020) and aligns with the idea of an intentional search for customer-validated opportunities in the market (Drucker, 1997; Putera et al., 2021). In this regard, Schumpeter (1934) had already postulated that innovation is based on the introduction of new or improved products, new forms of organization and/or production methods, new sources of supply, or new markets (Psomas et al., 2018). In this context, innovation is not merely about inventing an object, but about achieving meaningful advancements—which can range from the technological domain to the social or organizational domains (Simões, 2003; Tavassoli, 2015; Rad et al., 2021).

According to Sarkar (2010), innovation is the "exploration of new ideas that find acceptance in the market, usually incorporating new technologies, processes, designs, or

best practices; it can be seen in business models or forms, at the organizational or social level."

Similarly, the Oslo Manual (OECD, 2004) defines innovation as "the introduction of a new or significantly improved good or service, with regard to its characteristics or intended uses, or the implementation of new or significantly improved production, distribution, marketing, or organizational methods or processes."

Tidd and Bessant (2015) refer to a sequential implementation process: the "search" for new ideas; the "strategy" for selecting the paths to be taken; the "implementation" of ideas into concrete operational activities; and the "value capture," which aims to maintain the developed advantage and translate it into value for the company (Bitencourt et al., 2024).

However, innovation becomes more challenging when it is required from small and medium-sized enterprises (SMEs) with limited resources.

Widely present in the business sector, micro, small, and medium-sized enterprises (SMEs) represent 99% of the productive sector in Portugal and are responsible for 63.3% of the business sector's gross value added (INE, 2025). SMEs, as they are commonly referred to, often struggle to keep up with the dynamics of product and process innovation (Huggins & Johnston, 2009; Hanadi & Aruna, 2013), with limited available resources being one of the key constraining factors (Madrid-Guijarro et al., 2016).

Human resources are often limited in terms of strategic management - particularly at the leadership level - which hinders the development of an innovative positioning (Adla et al., 2020; Hanifah et al., 2020). Moreover, there is not always an external cultural environment conducive to mobilizing companies to adapt continuously to market changes (Fu et al., 2021; Kundurpi et al., 2021).

Today, innovation has become a critical factor for a company's own sustainability (Sarfo et al., 2024), including for SMEs - even in so-called traditional sectors - which are constantly tested for survival in an ever-changing market.

The scientific literature related to innovation in meat-producing SMEs is abundant, particularly in the areas of technology (Pellegrini et al., 2022), production (Wilkinson, 2023), the distribution chain (Jose & Shanmugam, 2020), sensory analysis (De Oliveira, 2019), and sustainability (Carrer et al., 2022), among others. However, studies focusing on innovation in SMEs within the meat marketing sector are rare (Baregheh et al., 2012).

In this study, the research highlights the introduction of new products by SMEs selling meat in the market, based on the availability of technical cuts. This represents a form of incremental innovation (Woschke et al., 2017). Therefore, it is crucial to further develop the literature related to this area.

In Portugal, a qualified trainer from the Professional Training Center for the Food Sector (Felner, 2022) notes that the primary reference for professionals in the field continues to be the book *Definição Anatômica das Peças do Talho (Anatomical Definition of Butcher's Parts)* by Ivo Soares, published in 1959. Another type of support material, according to the same source, “refers us to Brazilian videos on the internet, of dismantling or cutting – simply because there are no videos made in Portuguese” (Manuel, 2022). However, there are references available in Brazilian Portuguese (Lucas, 2016; ABIEC, 2019).

In Spain and in the Spanish language, there are bibliographical sources on the subject (Costas & López, 2019; Puharich, n.d.); in Uruguay, Camacho et al. (2008); and in Costa Rica, Quezada (2015). In English, several references are available (Underly, 2011; Farr et al., 2011; Fraioli, 2019), among many others originating from the USA and the United Kingdom.

Regarding the commercial appreciation of meat and its cuts, we identified studies on Iberian pork (Palmero, 1998; Ullastres, 2013) and on beef, focusing on consumer preferences (Wagner, 2014) or specifically on premium cuts in gourmet butcher shops (Lisbinski, 2019).

Naturally, at the scientific level, research remains extensive when focusing on food quality and safety, genetics, livestock, facilities and equipment, or animal welfare. For the community at large, research in the field of gastronomy also produces broad results,

which in the Portuguese case can be traced back to early works (Rodrigues, 1680) and key references such as Modesto (1982). However, these areas are not the focus of this work.

The literature review reveals a limited body of research and technical work in the field of meat cuts, particularly premium cuts, with little emphasis on marketing-related aspects. This contrasts with studies conducted in other regions, as previously mentioned. Therefore, this study poses the following question: Can the introduction of special technical cuts constitute an innovation capable of improving the competitive position and added value in meat marketing?

### **3. Methodology**

To conduct this study, we carried out an extensive literature review. Subsequently, to gain a deeper understanding of the business environment and the perspectives of retail companies (butcher shops), we benefited from the participation of four business owners who accepted our invitation to take part in exploratory interviews about the sector.

In order to gain insights into customers' positioning, usual purchasing behavior, and knowledge regarding technical cuts, a structured survey was conducted among butcher shop customers through face-to-face interviews. The survey was carried out over one week in cities in southern Portugal, on different days and at various times. Respondents were selected through convenience sampling and were approached as they left the butcher shop after completing their purchases. Overall, considering the number of approaches and completed questionnaires, the collaboration/response rate was 46%, resulting in 286 valid responses. Among respondents, 81% were women, with an average age of 54.9 years, and 12% were of foreign nationality.

It should be noted that this methodology was adopted after a pre-test revealed a low response rate when the survey was distributed for self-completion by butcher shop customers, which proved to be ineffective.

The data were processed using descriptive statistics, and multivariate analysis was applied through cluster analysis using Ward's method, with the aim of identifying homogeneous

groups in relation to knowledge of technical cuts. The results were obtained using SPSS software.

Regarding prices, we surveyed the “online butcher” options available from major national retail chains. In addition, one butcher shop was selected in each of the eight largest district capitals, based on the online options available. The first option displayed by the Google search engine was chosen, provided that product and price information were accessible.

This research enabled us to assess the availability of the special technical cuts discussed in this article, as well as other cuts relevant to the analysis, together with their respective prices. For comparison purposes, equivalent items in the current supply - designated as the commodity format - were identified to establish a mirror comparison.

#### **4. Results and discussion**

The results are presented in the following subsections, according to the applied methodology.

##### **4.1 The Current state of market**

From interviews with qualified informants, we obtained the following insights into the evolution and current status of street-level retail stores over the past two decades:

- Significant progress has been made in food hygiene and safety, requiring store renovations that incorporate permanent cold chains, dedicated areas for cutting and handling meat, improved display cases, and increased staff training.
- Meats continue to be predominantly industrial (standard format), sold at competitive prices. There has been an increase in the presence of meats with a Protected Designation of Origin (PDO) certification, particularly those from traditional portuguese breeds (beef) or the so-called “black/Iberian pig,” whose distinguishing feature is extensive rearing.
- The sale of game meats, such as wild boar, deer, and wild rabbit, has also increased.

- Brazilian meats, particularly barbecue cuts, have gained international prominence. All specialty or non-standard meats command higher sales prices.

They also state:

- An increase in the production of locally prepared foods aimed at adding value - such as hamburgers, meatballs, stuffed loin, breaded steaks, and other ready-to-cook items - targeting customers who are considered "time-poor" due to their professional commitments.
- The acquisition of equipment for aging meats, targeting more sophisticated customers with greater purchasing power.

Regarding technical cuts - particularly those currently in vogue in international restaurants and steakhouses - there is a significant lack of awareness among both store staff and consumers. However, they acknowledge that a growing trend is emerging.

They also add that:

- Over the past two decades, there has been significant improvement across all participants in the supply chain, including increased professionalism, adherence to deadlines, improved quality, and stricter hygiene standards.
- The market has experienced growth, accompanied by increased revenue.

To confirm this last observation, we sought recent data (2023) on meat consumption and obtained the following figures: average global per capita consumption per year is 43 kg. By country: India – 5 kg; Argentina – 100 kg; USA – 115 kg; Portugal – 124.3 kg; Germany – 52 kg (INE/E Revista, 2025). In other words, the portuguese market shows very high consumption levels, thus confirming the positive outlook expressed by business leaders.

This situation may be less conducive to the implementation of innovative elements within companies because, as Damanpour (2009) points out, “innovation is often driven by pressure from the external environment, including factors such as competition, deregulation, resource scarcity, and customer demand, and is associated with adaptive behavior that changes the organization to maintain or improve its performance.”

However, companies should leverage favorable conditions to introduce incremental innovations that differentiate them from the competition, while also increasing productivity, enabling growth, and improving wages to attract and retain human capital. Therefore, positive business cycles should be used strategically to prepare for the future.

#### 4.2 Technical cuts of pork and beef

At this stage, based on the literature consulted, it seems appropriate to identify the state of the art in terms of technical cuts, beef and pork, so that the following panorama is identified:

**Table 1 - Technical cuts in meat**

| Technical cuts in meat            |    |                                     |    |
|-----------------------------------|----|-------------------------------------|----|
| Pork – number of cuts per carcass |    | Cattle – number of cuts per carcass |    |
| Portugal                          | 9  | Portugal                            | 15 |
| Spain                             | 18 | Brazil                              | 19 |
| -                                 | -  | France                              | 29 |

Source: Felner (2022).

From the above, it can be seen that the country with the least detail in technical cuts is Portugal. See the comparison from the perspective of cut identification:

**Table 2 - Names of technical pork cuts:**

| Portugal |            | Espanha |            |    |           |
|----------|------------|---------|------------|----|-----------|
| 1        | Gourd      | 1       | Oreja      | 10 | Secreto   |
| 2        | Back ribs  | 2       | Cabeza     | 11 | Lagarto   |
| 3        | Shoulder   | 3       | Paleta     | 12 | Lombo     |
| 4        | Chop       | 4       | Castanuela | 13 | Costilha  |
| 5        | Spare ribs | 5       | Morro      | 14 | Panceta   |
| 6        | Back ribs  | 6       | Aguja      | 15 | Solomilho |
| 7        | Belly      | 7       | Presa      | 16 | Violín    |
| 8        | Loin       | 8       | Pluma      | 17 | Jamón     |
| 9        | Leg        | 9       | Paleta     | 18 | Rabo      |

Source: Felner (2022).

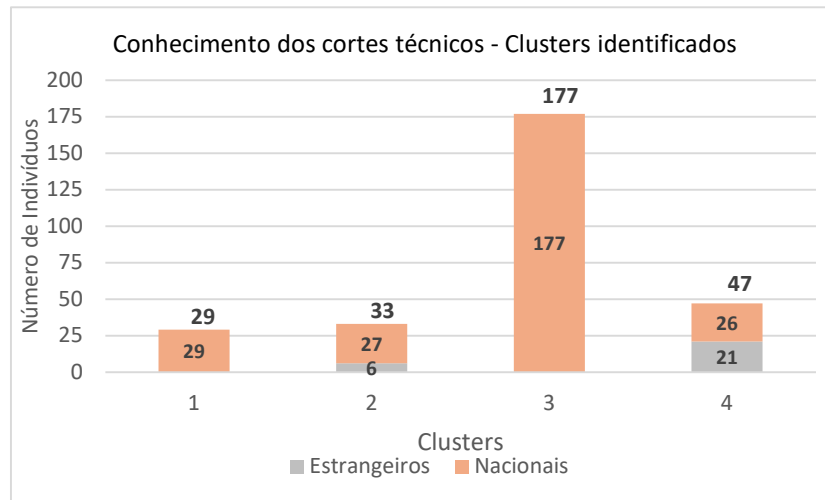
Note: We have kept the original Spanish names for the cuts of meat.

Furthermore, it is evident that in Spain, pork carcasses are more easily broken down into specific cuts, with particular emphasis on identifying the animal's prime cuts (Secreto, Pluma, Presa). In the black/Iberian pig market, these cuts command significantly higher market values than others. This represents a clear example of Innovation - specifically, the introduction of new products.

#### 4.3 The customer perspective

Following the administration of the questionnaire, we obtained insights into consumer behavior. The main findings are as follows:

- The majority of consumers tend to rely on the butcher's expertise and have made general requests such as pork or beef for boiling, grilling, stewing, or roasting (93%). They therefore trust the butcher's choice.
- The most frequent type of request (88%) is disaggregated by typical meat products, such as steaks, chops, pork slices, ribs, belly, or shoulder, specifying the species and the intended cooking method (boiling, roasting, grilling, stewing, frying, etc.).
- When asked about their knowledge of technical cuts, butcher shop customers were invited to identify three types of such cuts: in pork – *secretos* and *plumas* (variable X); in beef of Brazilian origin – *picanha* and *maminha* (variable Y); and in beef of U.S. origin – *Tomahawk* and *T-bone* (variable Z). Based on the responses to these three variables, four clusters were identified, as shown in the following chart.

**Figure 1 – Identified clusters**

- The most representative cluster (bar no. 3 in the chart) comprised 177 customers who were able to identify the technical cuts corresponding to variables X and Y but were unable to identify the beef cuts associated with variable Z.
- Cluster no. 4 consisted of 47 respondents who were able to identify all the cuts under analysis. It is noteworthy that when cross-referencing the responses of this group with nationality, 44.7% of respondents were of foreign nationality.
- Cluster no. 2, comprising 33 individuals, showed the greatest diversity in responses. For variable X, the level of knowledge was high (97% “yes” and 3% “no”); for variable Y, 66.7% “yes” and 33.3% “no”; and for the U.S. beef cuts, variable Z, 21.2% “yes” and 78.8% “no.” It should be noted that in this cluster, 18.2% of respondents were foreign nationals.
- Cluster no. 1 grouped 29 individuals who reported being familiar with the technical cuts in variable X but were entirely unfamiliar (100%) with those in variables Y and Z — that is, this group was only aware of the cuts applied to pork.

- Most customers (53%) recognize meat from certified autochthonous breeds (such as *Maronesa* or *Barrosã*) as being of higher quality. They consider it normal for such meat to be more expensive but report purchasing it only on special occasions.

From the above, we draw the following conclusions: business owners have a positive outlook on the sector and the evolution of stores, the service they provide to consumers, the shift toward pre-prepared complementary products, and the positioning of butchers toward more sophisticated customers. They acknowledge a lack of knowledge about special technical cuts (notably international ones) but view this as an opportunity to be explored.

Most customers buy standard, undifferentiated meat (treating it like a commodity) and trust the store and the butcher who serves them. Their orders are essentially tailored to the dishes being prepared. Among specialty cuts, they are familiar with those related to the black Iberian pig, and among beef cuts, particularly Brazilian barbecue cuts, as well as some traditional Portuguese cuts. International cuts based in the U.S. are primarily known by people from abroad.

#### 4.4 Products and prices on the market

The survey conducted revealed that all butcher shops primarily offer a standard, undifferentiated range of products. In addition, all of them provide the most well-known Iberian black pork cuts, namely *secretos*, *plumas*, and *presa*. Regarding beef technical cuts, traditional portuguese options such as *bife da vazia*, *acém*, and *alcatra* are frequently available. However, technical cuts such as *tomahawk*, *t-bone*, or *entrecôte* are found mainly in the catalogs of large retail chains, across four distribution networks. The *Tomahawk* cut was also available in 25% of the traditional (street) butcher shops surveyed.

Regarding prices, starting with pork, the cut known as *secretos* shows a 77.7% increase in value when compared with the equivalent part of the animal without the extraction of the section identified as *secretos*. If we compare *secretos* extracted from standard pork (thus already involving the technical cut) with the equivalent cut from Iberian black pork - which we classify as *prime* - the added value is 62.5%.

In the case of beef, the *alcatra* cut serves as the source for cuts such as *picanha* and *maminha*. Comparing the retail price of *alcatra* in butcher shops, considering only portuguese beef, we find an average price of €15 per kilogram. The *picanha* cut immediately adds a 21.5% increase in value, reaching €18.20. When the comparison is made with South American *picanha* (classified as *prime*), the value increase for this origin reaches 64.8%.

Regarding the prices of veal chops for grilling from national beef, the standard retail price is €13 per kilogram. The introduction of the technical *Tomahawk* cut raises the price to €25, representing a 91.9% increase in value. When comparing this price with the same cut applied to imported South American beef (classified as *prime*), the price rises to €37, corresponding to an additional 48.3% increase in value. The cut known as *T-bone* presents similar prices and value increments to those of the *Tomahawk*.

From the above, we conclude that major supermarket chains are attentive to new market trends and already offer some special cuts, particularly those currently in vogue. Traditional (street) butcher shops remain largely outside this trend, with a few exceptions.

The price analysis clearly shows an increase in the value of cuts that have been popularized from Spain in Iberian pork (*secretos*, *presas*, *plumas*) and from Brazil in beef (e.g., *picanha* and *maminha*), even when applied to standard-quality meat. Special technical cuts, when applied to meat from nationally produced animals, significantly enhance their market value.

**Table 3 – Added value of meat with the introduction of technical cuts**

| Carcass cut | Standard cut | Technical cut | Value increase vs. standard (%) | Prime breed | Value increase vs. non-prime technical cut (%) |
|-------------|--------------|---------------|---------------------------------|-------------|------------------------------------------------|
| Secretos    | 4,5          | 8,0           | 77,7                            | 13,0        | 62,5                                           |
| Picanha     | 15,0         | 18,2          | 21,5                            | 30,0        | 64,8                                           |
| Tomahawk    | 13,0         | 25,0          | 91,9                            | 37,0        | 48,3                                           |

**Note:** Values in € per kilogram.

The figures presented correspond to averages, based on the data sources described in the methodology.

## 5. Conclusions

We believe it can be affirmed that the adoption of technical cuts increases the added value of meat sales. This is evident in the higher prices achieved for meat from black pigs and for beef cuts popularized for barbecues. It also validates the investment made in innovation at this level. In the domestic market, there has traditionally been less emphasis on detailed cutting and a limited use of technical cuts as a strategy to enhance the value of meat sales.

However, certain customer groups - such as foreign residents, tourists, and consumers accustomed to international “steakhouse” brands - are willing to purchase and pay a premium for high-quality international technical cuts. Therefore, training is needed both to ensure that butchers can properly prepare these technical cuts and to promote consumer education aimed at expanding the customer base.

Given the potential for customer base growth, retailers (butcher shops) should pursue a customer segmentation strategy aligned with differentiated products that meet consumer preferences. Such positioning will not only increase customer satisfaction, attract new audiences, and add value, but will also have positive effects throughout the upstream value chain. Naturally, it will not be feasible for all companies to adopt this approach, but it is likely to be implemented where the market is more receptive to value-added products.

Thus, our initial research question can be answered affirmatively. We believe this represents an incremental product innovation, as it delivers value to customers in a differentiated way, renews the organization’s market offering, and provides a unique selling proposition capable of appealing to specific market segments. The expected outcome is a strengthening of competitiveness. Therefore, a clear path emerges for small national retailers and butcher shops - particularly in large cities and tourist regions - to follow. This innovation is incremental relative to their traditional offerings.

## 6. Limitations and suggestions for future studies

The main limitation of this study is that it was conducted in a specific area: the Algarve region, in southern Portugal. We believe broader insights could be obtained if the research were extended to the entire country, encompassing a more diverse sample in terms of both company positioning and consumer profiles. Such an expansion would enable more robust conclusions that could better inform the many SMEs operating in this sector.

Finally, we propose the following question for future research: if value increases are observed when special technical cuts are applied to Iberian pigs or South American cattle, could a new opportunity emerge by applying the same approach to native portuguese breeds? Indeed, safeguarding native breeds ultimately depends on achieving greater market value for their recognized quality. Substantial work remains to be done in terms of market development and commercialization.

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