Top Findings of the Power of Meat 2015

1. **Price increases prompted shoppers to seek alternatives** — Price increases for both beef and pork caused shifts in buying behavior among 40 percent of shoppers, with most looking for ways to save. At the same time, others returned their focus to quality, convenience and nutrition. The meat purchasing decision tree reflects this dichotomy in the marketplace, with price per pound in first place, followed by appearance in second — a position it lost to total package price in 2011.
2. **Shoppers open to switching between proteins, cuts and brands** — Demonstrating high price sensitivity, consumers were open to switching within the meat department for cuts with high substitutability, while others sought protein outside the meat case. The use of protein alternatives is led by eggs and beans, with prime reasons being adding variety, health and cost. Millennials are more likely to use meat alternatives for ease of preparation.
3. **Megatrends affect the meat purchase** — Shoppers are also influenced by mega trends, including local sourcing, sustainability, health and wellness, and organic. Shoppers are putting greater effort into making nutritious meat/poultry choices, with an emphasis on leaner cuts and portion control. Local interest is driven by freshness and supporting the local economy, with shoppers defining local as being from within a certain mile radius or their state.
4. **Alternative channels take some of the fresh dollar** — Supermarkets remained the dominant outlet for fresh meat and poultry. Farmers' markets are the greatest source of the occasional purchase, at 15 percent of shoppers. Online meat and poultry sales may grow along with improved availability and growing confidence in quality.
5. **Meat purchase decision increasingly shifting to in-store** — While meat and poultry remained well-researched list items for many shoppers, a greater share made the ultimate buying decision between species, cuts and brand in-store — putting additional emphasis on operational excellence.
6. **Value-added fast growing but narrow segment** — One-quarter of shoppers say they purchase value-added items sometimes or regularly, but for most cost (21 percent) or preferring to prepare items themselves (46 percent) are the greatest barriers to purchase. Regardless of all heat-and-eat, ready-to-eat and value-added solutions provided by food retailing, foodservice continues to win the last-minute dinner decision.
7. **Full-service counters highly valued** — Retailers brought back the full-service meat case and shoppers appreciated it: 63 percent among shoppers with access consider this a store advantage. Among those who don't have access, 36 percent said they wish their primary store had a counter.
8. **Natural/organic segment continues to grow** — A rising share of shoppers say they have purchased natural/organic meat and poultry and most expect to maintain or increase their current purchase level. The top reasons for purchasing natural/organic are "free from" and better health and treatment of the animal. For those not yet engaged in the segment, price remains the largest barrier, followed by seeing no added benefits.
9. **Meat and poultry provide nutrition and balance to the diet** — Across the population, poultry is seen as more important to eating a balanced diet, whereas meat is most highly associated with being a source of important nutrients. Millennials are more likely to associate with functional benefits and less likely to emphasize enjoyment.
10. **Winning while faced with volume pressure** — Shoppers' comments for improvement point to better every-day and promotional pricing; better quality; better in-stock performance and variety in package sizes, cuts, and specialty items; and customer service excellence.

Additional Resources

- To download your free copy of the report and/or presentation, visit: www.meatconference.com/POM2015
- For questions or comments regarding the report or presentation, please contact: aroerink@210analytics.com | NAMI: Ann Wells at awells@meatinstitute.org | FMI: Laurie Gethin at lgethin@fmi.org
- For regulatory or legislative questions, please contact: NAMI: Mark Dopp at mdopp@meatinstitute.org | FMI: Stephanie Barnes at sbarnes@fmi.org
- Members of the media, please contact: NAMI: Eric Mittenthal at emittenthal@meatinstitute.org | FMI: Heather Garlich at hgarlich@fmi.org

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