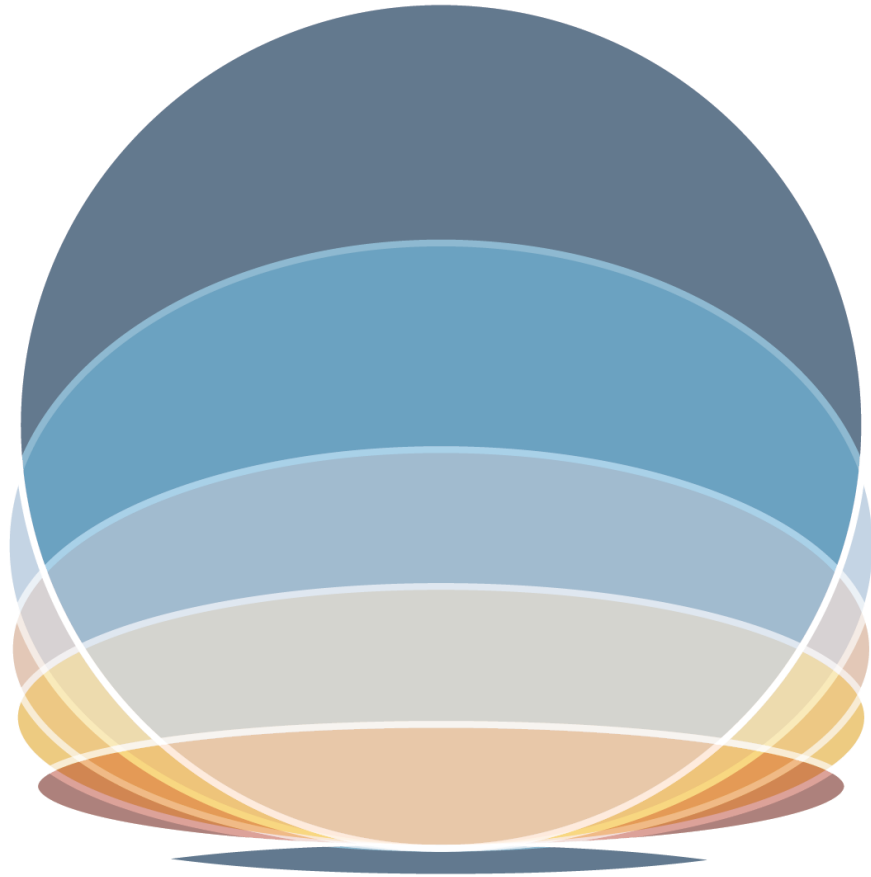


Balancing Needs at the Meat Case

Trends and Insights Into Today's Consumer

midan





MEAT CONSUMER SEGMENTATION 3.0

Connected Trendsetters




Claim
Seekers

Convenience Cravers

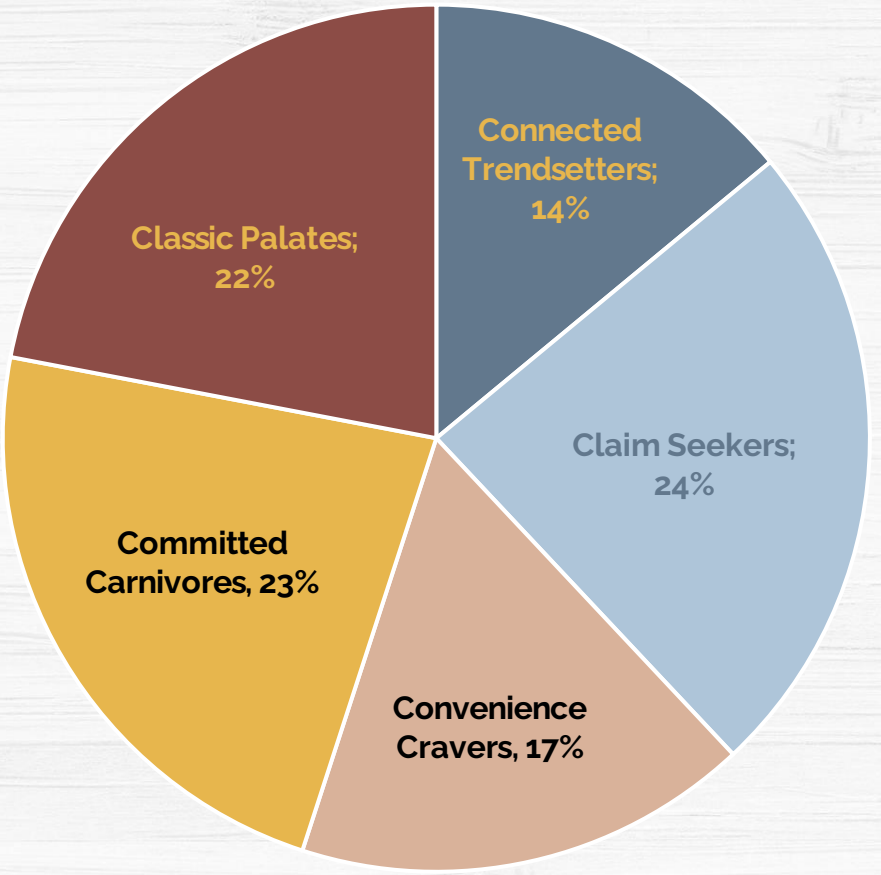


Committed Carnivores




Classic
Palates

2023 Meat Consumer Segments



Multicultural Meat Consumers

- Purchase larger variety of meat cuts
- More likely to share grocery responsibility
- Aware of and interested in claims



Midan Marketing, Multicultural Meat Consumer Research, 2021

Millennials

- High consumption of all protein types
- Encumbered with debt
- Like to experiment with new foods



Generation Z

- Adventurous eaters
- Interactive
- Likely to replace meat with plant proteins in the future



Consumers of Tomorrow

Shared Attitudes:

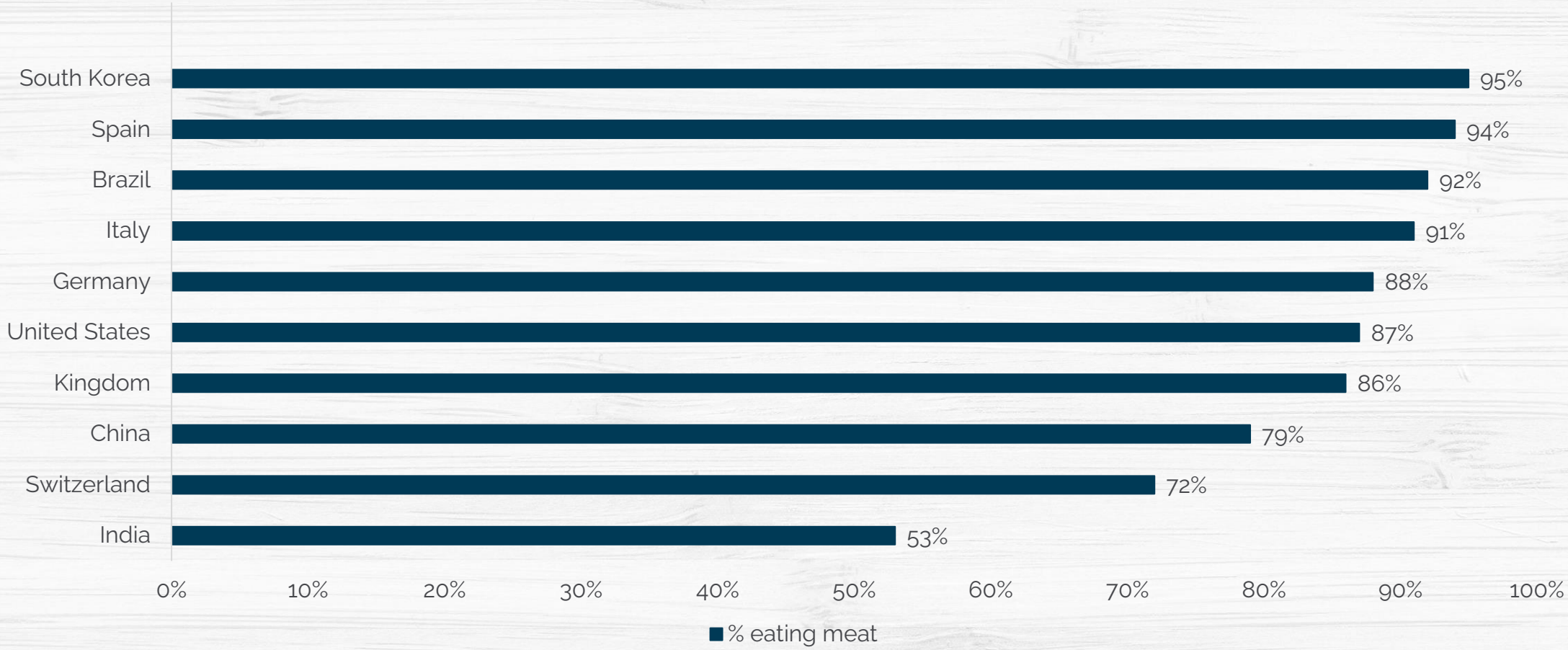
- Animal care practices
- Nutrition
- Environmental concerns
- Online shoppers







Population Consuming Meat By Country



Global consumption of meat protein is projected to increase by **14%** by 2030.



United Nations Food and Agriculture Organization, Agricultural Outlook: Meat 2021-2030, March 2023

Role of Meat in the Global Diet

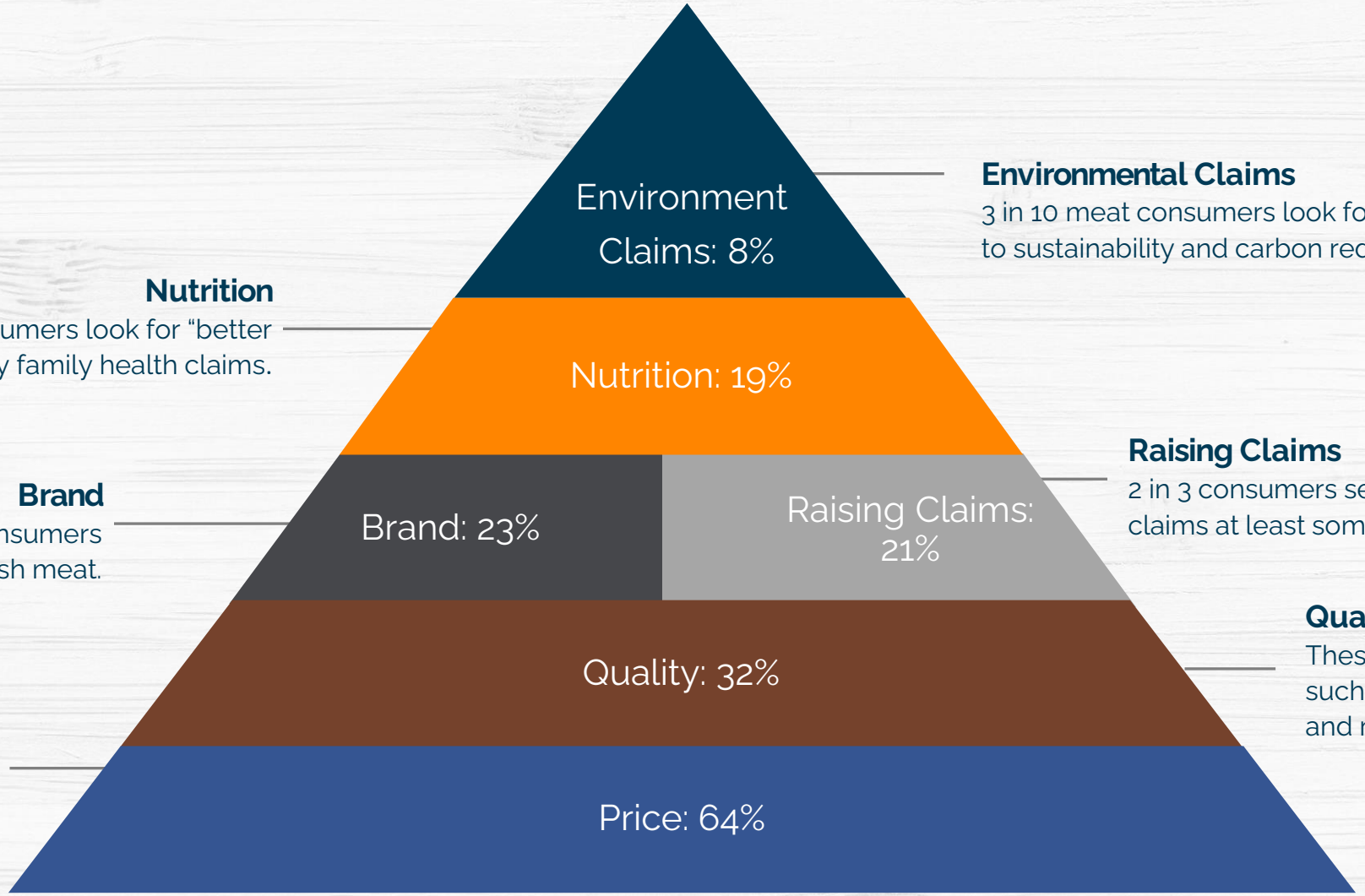








The Consumers' Journey to Choosing Value at the Meat Case



Environmental Claims
3 in 10 meat consumers look for claims that relate to sustainability and carbon reduction practices.

Nutrition
62% of consumers look for "better for" me/my family health claims.

Raising Claims
2 in 3 consumers seek out claims at least sometimes.

Brand
Over half of consumers prefer branded fresh meat.

Quality
These are indicators such as USDA grade and marbling.

Price
For 64% of beef consumers, price is a top influencer when purchasing beef.

Midan Marketing, Beef Attributes Research, 2022
Anne-Marie Roerink, Principal, 210 Analytics LLC, The Power of Meat 2023, Report sponsored by Sealed Air Food Care Division/Cryovac® and Published by FMI and the Foundation for Meat & Poultry Research & Education

Making Changes at the Meat Case

76%

of meat shoppers are making one or more changes to their meat case purchases as they react to inflationary pressure.



Anne-Marie Roerink, Principal, 210 Analytics LLC, The Power of Meat 2023, Report sponsored by Sealed Air Food Care Division/Cryovac® and Published by FMI and the Foundation for Meat & Poultry Research & Education

Price is a Rising Factor

In 2022, **60%** said product quality is the most important factor when purchasing meat/poultry and **48%** said price. In 2023, these factors became significantly closer as **53%** said quality and **50%** said price per pound.



Anne-Marie Roerink, Principal, 210 Analytics LLC, The Power of Meat 2023, Report sponsored by Sealed Air Food Care Division/Cryovac® and Published by FMI and the Foundation for Meat & Poultry Research & Education

How Consumers Define Beef Quality

#1 USDA PRIME

#2 USDA CHOICE

#3 Product of the USA

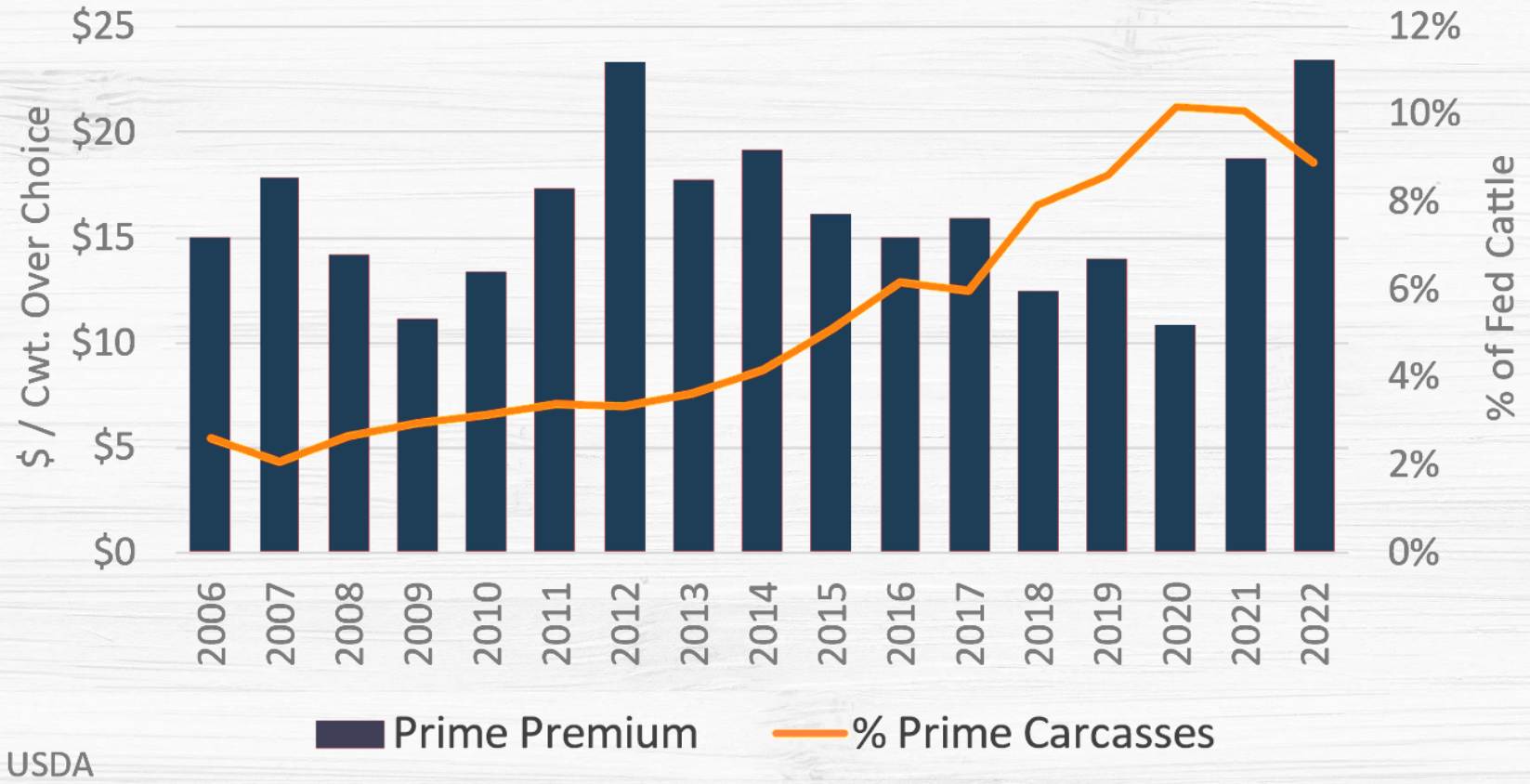
#4 All Natural

#5 NO ADDED HORMONES EVER

#6 No Antibiotics Ever

Midan Marketing, Beef Attributes Research Survey, April 2022

Demand for Prime Beef is Outpacing Supply



USDA

USDA AMS, Meat Grading Reports

How Consumers Define Pork Quality

#1 NO ADDED HORMONES

#2 All Natural

#3 No Antibiotics Ever

#4 No Growth Promotants

#5 Product of the USA

#6 No Artificial Ingredients

Midan Marketing, Pork Attributes Research Survey, February 2023

Today, **63%** of consumers prefer brands when it comes to purchasing fresh meat.



Anne-Marie Roerink, Principal, 210 Analytics LLC, The Power of Meat 2023, Report sponsored by Sealed Air Food Care Division/Cryovac® and Published by FMI and the Foundation for Meat & Poultry Research & Education

Transparency

72%

of consumers consider transparency to be important or extremely important when making food purchases.



Anne-Marie Roerink, Principal, 210 Analytics LLC, The Power of Meat 2023: An In-Depth Look at Meat Through the Shopper's Eyes, Report sponsored by Sealed Air Food Care Division/Cryovac® and Published by Food Marketing Institute Foundation for Meat & Poultry Research & Education

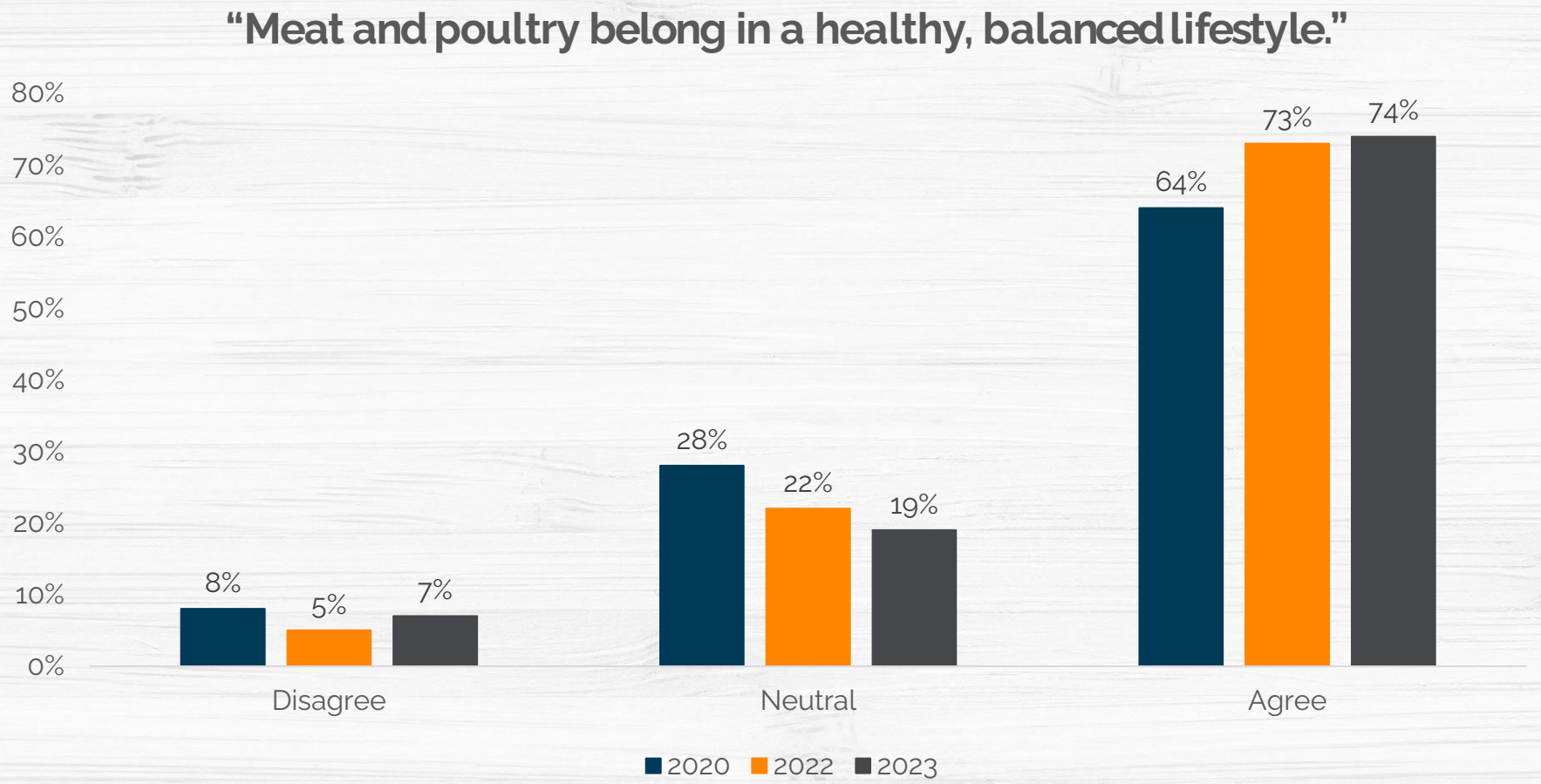
Shoppers Want to Make Better For Choices

64% of shoppers look for products that are “better for" me/my family, the farmer/worker, the planet or the animal



Anne-Marie Roerink, Principal, 210 Analytics LLC, The Power of Meat 2023: An In-Depth Look at Meat Through the Shopper's Eyes, Report sponsored by Sealed Air Food Care Division/Cryovac® and Published by Food Marketing Institute Foundation for Meat & Poultry Research & Education

Health Perception of Meat



Highlight Nutrition

4 in **10**

want more protein in their diet



NPD, America's Health Pulse: Closing the Gap Between Wants and Needs, 2022

Diet Trends Lean Into Sustainable Beef

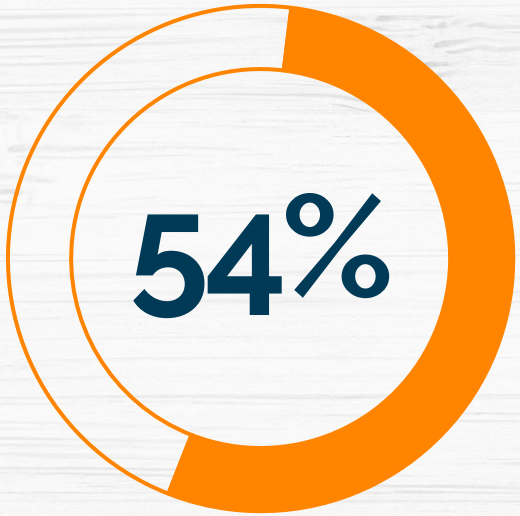
1 in **3**

said they view food grown using regenerative agriculture as more nutritious than that grown through conventional practices

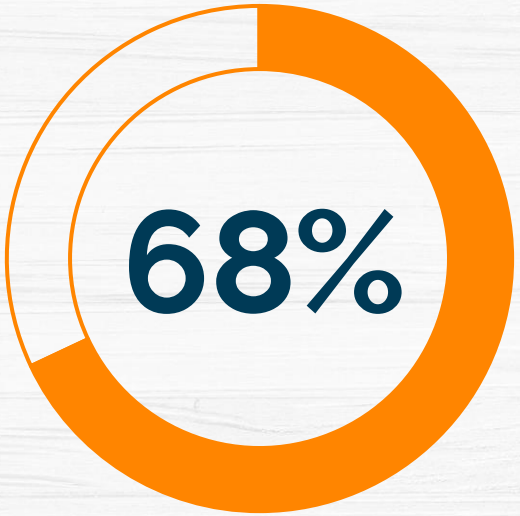


Food Insight, Consumer Perspectives on Regenerative Agriculture, February 2022

Sustainability Influences Food Purchases



Meat



Non-grocery items



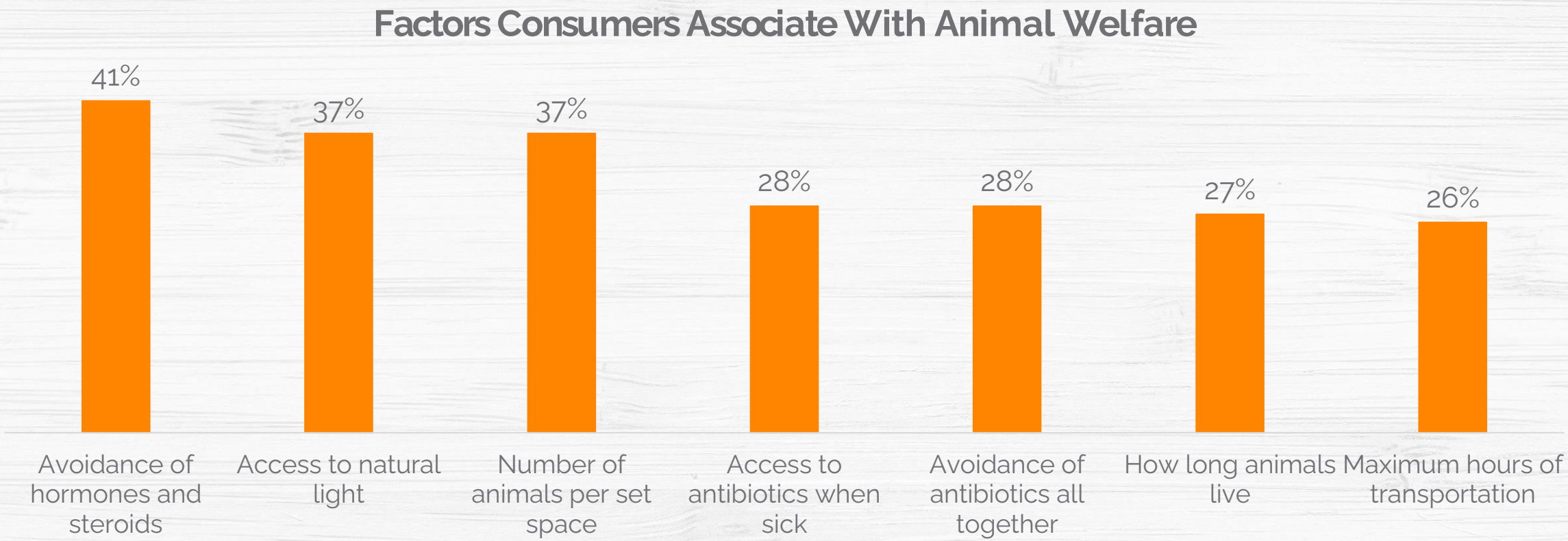
Midan Marketing, Meat Eater Sustainability Survey, July 2021

Meat's Sustainability Story Must Include Animal Welfare

MOST IMPORTANT MESSAGES

- Raised without antibiotics and hormones
- Better animal welfare
- Carbon footprint
- Waste reduction

Animal Welfare Components



Other components: Maximum hours of transportation, how long animals live, avoidance of antibiotics, and access to antibiotics when sick

Raising Claims

21%

of consumers consider raising claims a top influencer when it comes to purchasing beef



Midan Marketing, Beef Attributes Research, 2022

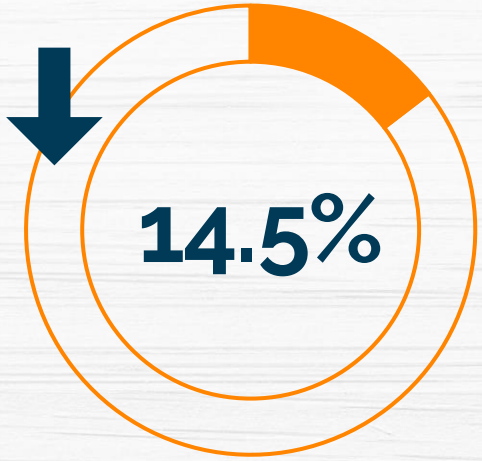
California Prop 12

Supreme Court Backs California Prop 12



Plant-Based Meat's Performance

2022 Refrigerated Plant-Based Meat Alternatives:



Volume sales



Dollar sales



Anne-Marie Roerink, Principal, 210 Analytics LLC, The Power of Meat 2023, Report sponsored by Sealed Air Food Care Division/Cryovac® and Published by FMI and the Foundation for Meat & Poultry Research & Education

How Consumers Feel About Cell-Based Meat

16%

of consumers probably or definitely would purchase cell-based meat.





For more information please contact:

Michael Uetz

Principal

m.uetz@midan.com

Michael Uetz

Scan the QR code to learn more about Midan's Meat Consumer Segmentation 3.0

© 2023 Midan Marketing Inc.