Top Findings of the Power of Meat 2022

ANNUAL MEAT CONFERENCE 2022

1. **The combination of higher prices and home-centric meals led to another sales record for meat, despite lower volume.**
Dollar sales increased 0.3% to $81.8 billion, but volume could not keep pace with 2020 sales and was down 5.6%. Shoppers made fewer meat trips but spent more per trip, while household penetration remained high, at 98.5% (IRI). Convenience-focused meat and poultry thrived as consumers looked for time savings and interesting flavors. Shoppers like to see more value-added (68%), fully-cooked items (59%), meal kits (64%) and deli-prepared meat variety (67%).

2. **Consumers are well aware of supply chain challenges and inflationary pressures, and are adjusting purchases.**
75% of consumers have noted higher meat/poultry prices and 43% see fewer promotions. In response, 61% save by eating out/ordering in less and instead try to recreate restaurant experiences at home (62%). Additionally, 72% have changed retail meat purchases. Supply chain challenges are also noticed: 38% of shoppers see more out of stocks and 21% see less variety.

3. **The population's share of meat eaters remained strong and meat/poultry permissibility remains high.**
Meat eaters make up 74% of consumers compared with 71% last year. Flexitarians make up 16% and vegans/vegetarians remain at 6%. 73% of consumers agree that meat belongs in a healthy, balanced lifestyle, but even so, 37% try to eat a little less of it. Home-prepared dinners with an actual portion of meat/poultry dropped back to pre-pandemic levels, at 3.9 per week.

4. **Meat promotions are on the shopper radar amid higher prices, but where they find promotions continues to change.**
While fewer promotions were available, 75% of shoppers check specials pre-trip, 80% compare prices/promotions across items in-store and 89% look for the ideal package price. In-store signage, the digital circular and store app exceed the use of the once dominant printed circular. Cents-off the price per pound is the top discount, followed by meat BOGOs.

5. **More shoppers buy meat/poultry at supercenters, clubs and online. But not all items make the cut in online baskets.**
35% of consumers have bought at least some meat/poultry online. 79% of Gen Z buy the same meat/poultry items online as they do in store versus just 38% of Boomers. Whole muscle cuts remain largely an in-store purchase, but ability to indicate specifications (41%), money-back guarantees (38%) and employee training (36%) can help overcome online buying hesitations.

6. **Digital sources dominate when looking for meat/poultry tips and how to's, with a shift from websites/apps to social media.**
Search engines and YouTube are the top platforms for meat tips and how to's. TikTok has become very powerful among Gen Z and Millennials. Consumers search by the kind of meat/poultry (58%), by cut (52%) and cooking method (48%). The ability to add all recipe items to a list or online shopping cart in one click is of interest to 57% of people.

7. **Value dominates the meat purchase and private brands grew as a consumer-preferred choice.**
Product quality/appearance together with price per pound and/or the total package price dominates the meat purchase. The fourth and fifth factors vary by demographic, ranging from brands and claims to nutrition and preparation knowledge. The outright preference for manufacturer brands reached a 17-year high of 29% in fresh meat and private brand preferences reached new records for both fresh (31%) and processed (26%) meat.

8. **The meat case accounts for the bulk of purchases but the service counter serves an important role.**
Despite 77% of consumers having access to a full-service counter, a shopper-estimated record 75% of purchases are made at the self-serve meat case. Current access aside, 59% of shoppers value the idea of a service counter for special cuts, advice or special occasions. Having a meat associate roam the meat case area for tips or assistance is of interest to 36% of shoppers.

9. **Focus on better-for-me/my family remains high; better-for-the-animal, planet and worker matters to about one-third.**
Among the 64% weighing better-for-me/my family, leaner cuts are the most common strategy (40%), followed by avoiding second helpings (33%). Among the 32% of people emphasizing better-for-the-planet, local, grass-fed and environmentally-friendly packaging are the top meat strategies. The 31% who weigh animal welfare in their purchase decisions, get educated through search engines, on package information, social media, documentaries and friends/family.

10. **Skepticism surrounding cultivated meat remains, plant-based meat alternatives hold steady and blends have potential.**
40% of consumers are unwilling to try cultivated meat versus 29% being open. Plant-based meat alternatives remain mostly an occasional choice with only 9% eating them weekly. Sales plateaued mid-year and backslid in the third and fourth quarters. Blended items enjoy both higher household penetration and a greater preparation frequency than alternatives.

Download further resources on the webinar platform or reach out for more information/questions:

- For study information/questions, please contact Anne-Marie Roerink at aroerink@210analytics.com
- For questions about NAMI, please contact Ann Wells at awells@meatinstitute.org
- For questions about FMI, please contact Rick Stein at rstein@fmi.org

Report made possible by Sealed Air Food Care Division/Cryovac®