The Power of Meat 2018

An in-depth look at the Meat at Retail

through the shoppers' eyes

Presented by:

Anne-Marie Roerink | 210 Analytics

Rick Stein | FMI

Made possible by:

FMI

THE VOICE OF FOOD RETAIL

Feeding Families Enriching Lives

FMI is the trade association that serves as the voice of food retail. We assist food retailers in their role of feeding families and enriching lives.

The Association:

Our members are food retailers, wholesales and suppliers of all types and sizes

FMI provides comprehensive programs, resources and advocacy for the food, pharmacy and grocery retail industry

- ASSET PROTECTION
- CENTER STORE
- COMMUNICATION
- CONSUMER & COMMUNITY AFFAIRS
- EDUCATION
- FOOD SAFETY & DEFENSE
- FRESH FOODS
- GOVERNMENT RELATIONS
- HEALTH & WELLNESS
- INDEPENDENT OPERATOR
- INFORMATION SERVICE
- PRIVATE BRANDS
- RESEARCH
- SUPPLY CHAIN
- SUSTAINABILITY
- TECHNOLOGY
- WHOLESALER

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FMI is committed to the growth and success of fresh companies and their partners. FMI provides resources and networks that support the interests of member companies throughout the global, fresh produce supply chain, including family-owned, private and publicly traded businesses as well as regional, national and international companies.

Fresh Foods

Emphasis on fresh

- Produce
- Meat
- Seafood
- Deli/In-store, fresh prepared foods and assortments
- Bakery
- Floral

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FMI Fresh Foods

Research and Education

In-depth information, trends and insights to foster innovation, take advantage of new opportunities and help develop winning strategies

Networking

Share ideas, explore best practices and develop business relations

Advocacy

Understand what is going on in Washington and make your voice heard

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Nicole Wegman*
Wegmans Food Markets, Inc.

*** Silent members**

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The Power of Meat 2018

An in-depth look at the meat department through the shoppers' eyes

Presented by:

Anne-Marie Roerink

210analytics

The Power of Meat 2018

- Consumer survey among 1,500 shoppers
  - 13 years and running
  - Updates on long-standing trend lines
  - New topics to address emerging trends
- Real-life overlay IRi nielsen MarketTrack The Power of Market Intelligence
- For the industry by the industry

Study taskforce

meijer
SUPERVALU
Bristol Farms
TARGET
FRESH THYME FARMERS MARKET
NH Foods Australia
National Beef
JBS
SunFed RANCH
SINCE 1978 CERTIFIED ANGUS BEEF BRAND
BEEF. IT'S WHAT'S FOR DINNER. Funded by Beef Farmers and Ranchers
HUSSMANN
Sealed Air CRYOVAC
YERECIC LABEL entice•inform•inspire
pork checkoff
EST. 1966 BELMONT MEATS
IRi
nielsen
MarketTrack The Power of Market Intelligence

2017: A different world yet again

Need to change routines, the shoppers' and our own

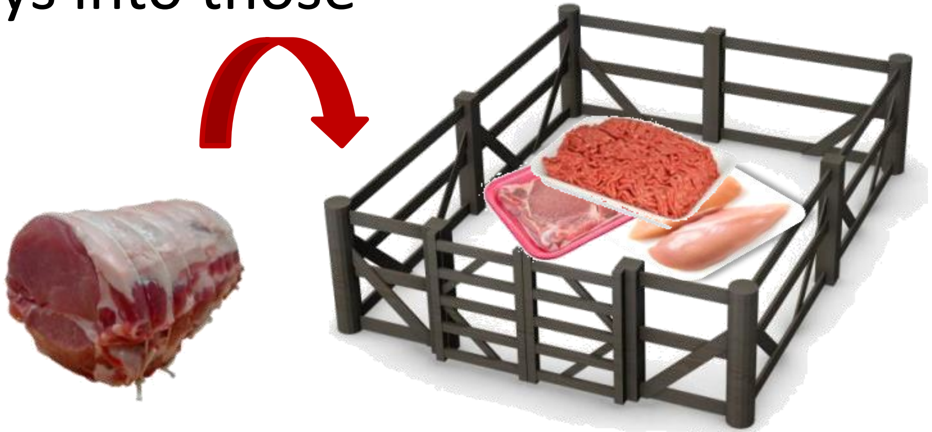
	Dollars	Volume
2015	+4.5%	+0.7%
2016	-2.8%	+3.1%
2017	+0.6%	-0.3%

* Fresh meat

Source: IRI, MULO, 52 w/e 12/31/2017 | | Picture: 210 Analytics

Accomplishing growth while mitigating risk

1. Identifying megatrends that are proven sales generators throughout the store, including fresh
2. Optimize how meat plays into those trends to grow:
   - Penetration
   - Trips
   - Basket size



Hard data on hot trends

How can meat best capitalize on proven, sales-generating megatrends?

One-size-fits-me		**Value-seeking**	
	**Upskill**	**People power**	**Shopping reinvented**
Brand premiumization		**Ethical living**	
Healthy living	**Buying time**		**Improved shopping**

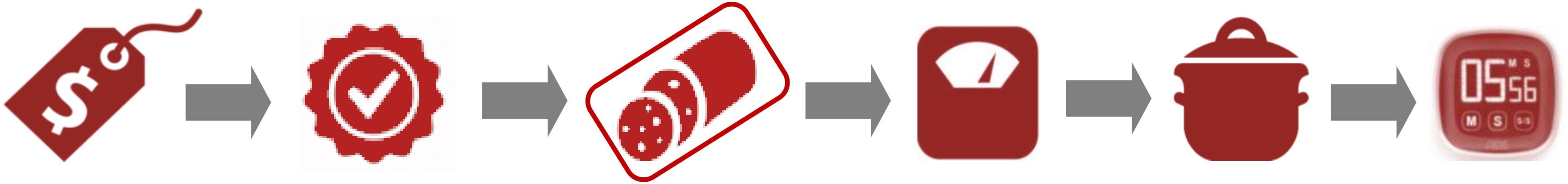
Competitive forces, demographic shifts and mega trends are reshaping the food retailing industry, and meat along with it — requiring targeted branding, marketing, merchandising and advertising

ONE-SIZE-FITS-ME

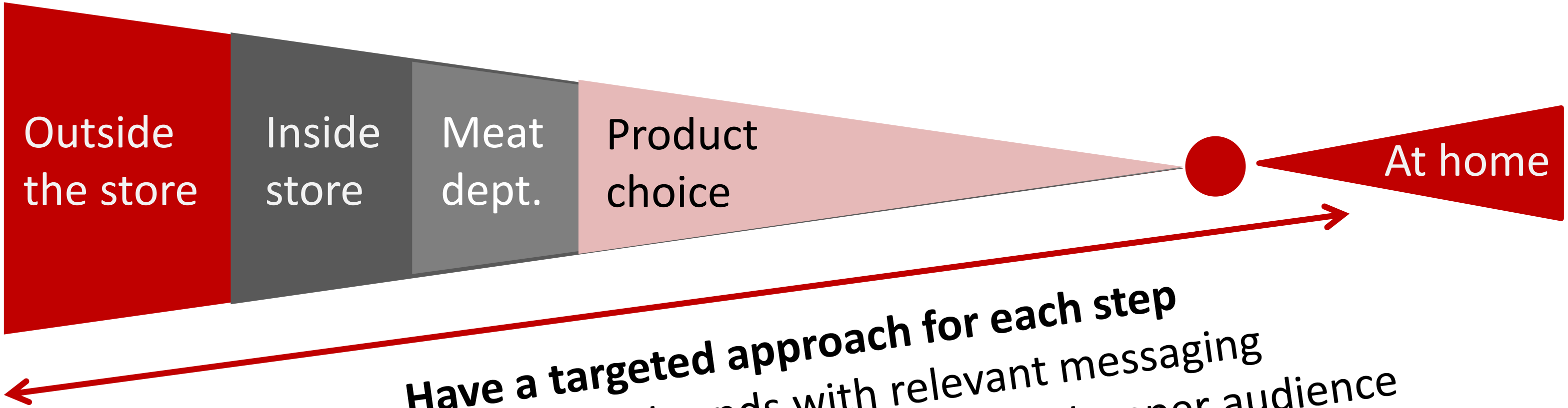
Price rules the meat purchase, hand-in-hand with appearance

Meat purchasing decision tree

Price/pound	Appearance/quality	Total package cost	Nutrition	Prep. knowledge	Prep. time/ease
35%	**26%**	**17%**	**10%**	**8%**	**4%**



Different meat shoppers have different approaches in each stepping stone of the path-to-purchase



Have a targeted approach for each step

Establish strong brands with relevant messaging

Curate a unique assortment tailored to the shopper audience

Food for thought

- One-size-fits-all must make room for one-size-fits-me
- Personalization throughout the path-to-purchase
  - Curated assortment
  - Package size variety
  - Information and education
  - Product/production attributes
  - Promotional outreach (message, platform, item, etc)

Food for thought

- One-size-fits-all must make room for one-size-fits-me

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One-size-fits-me most clearly manifests itself in shoppers' money-saving measures, that remain important as the price continues to dominate the meat decision.

VALUE SEEKING

As price rules, promotional research remains big

	Check frequently + every time	Millennials	Boomers
Across stores	41%	42%	34%
At the main store	57%	42%	57%
Across items	64%	57%	64%
Across packages	74%	79%	70%

Digital touch points gain, along with in-store signage

57% Circular at home	**51%** In-store promotions	**41%** Circular in-store
36% Digital circular	**15%** Store app	**22%** Email/ website
11% Social media	**2%** Text specials	

Year-over-year:
Decline
Growth
No change

Digital touch points gain, along with in-store signage

57% Circular at home

51% In-store promotions

41% Circular in-store

36% Digital circular

15% Store app

22% Email/ website

11% Social media

2% Text specials

4-year CAGR:
Decline
Growth
No change

The Millennial way is very different, except for in-store

Millennials 18-26	26-37	Top resources	Boomers
37%	53%	Paper circular pre-trip	64%
55%	50%	In-store promotional signage	53%
35%	40%	Paper circular in store	41%
37%	41%	Electronic circular	29%
19%	18%	Store app	9%
21%	27%	Meat promotion email/web	17%
13%	20%	Social media deals	2%
5%	2%	Text specials	0.3%

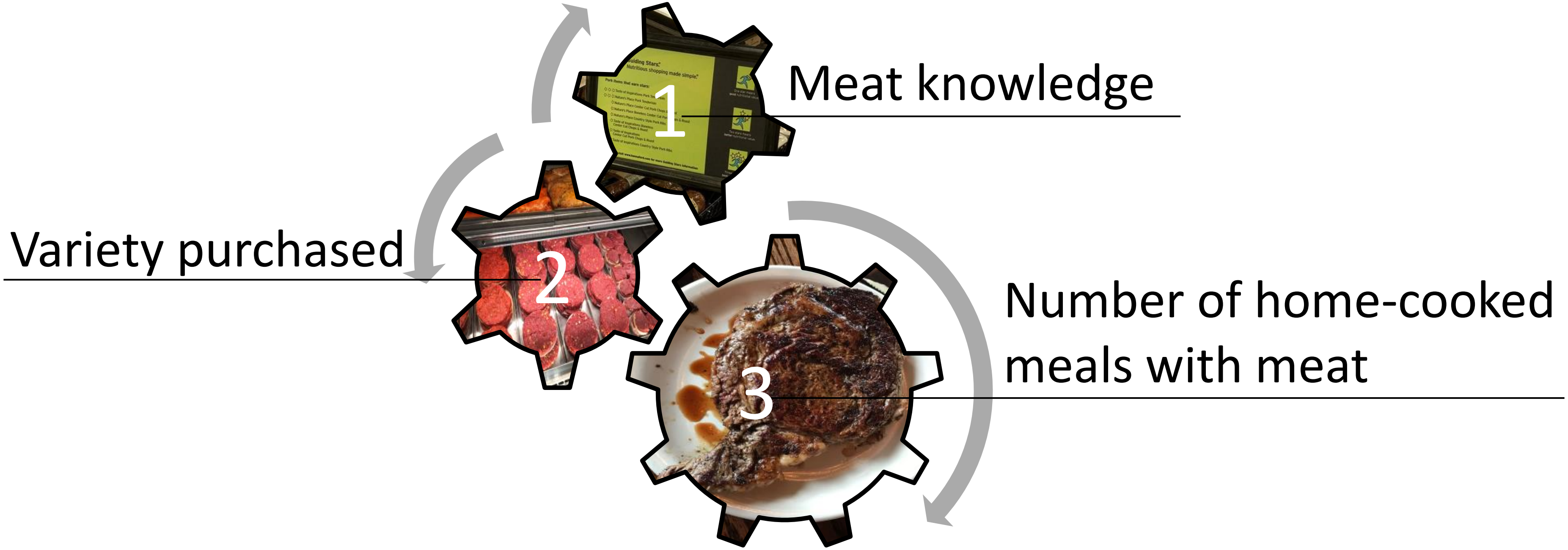
Food for thought

- Consumers research meat across stores, items and packages, are you making it easy?
- Don’t just have the hottest ad, have the most relevant ad on the most relevant platforms
  - Target promotions/messaging in fragmented market
  - Right product, right price, right messaging, right timing, right platform
- Leverage technology to include education, tips, list generation, ordering, etc. to move beyond price

To grow, the industry needs to look beyond price and volume. Much can be gained by enhancing shoppers' meat skills and affinity to drive a greater variety of items purchased and prompt people to cook with meat more often.

UPSKILL

How can we inspire people to one more home-cooked meal with meat? Three inputs to the puzzle…



1) America’s meat knowledge is lacking

53% of shoppers merely manage or need help

Self-rated meat/poultry knowledge across 5 areas

Knowledgeable	Know the basics	Need help
47%	35%	18%

Annual Meat Conference | The Power of Meat© 2018 | | Picture: 210 Analytics
Meat/poultry preparation, marinating/seasoning, nutrition and USDA grading system

2) 83% of shoppers buy just a handful of cuts/kinds

41%

Buy a handful of cuts/kinds and don’t tend to try anything new or different

42%

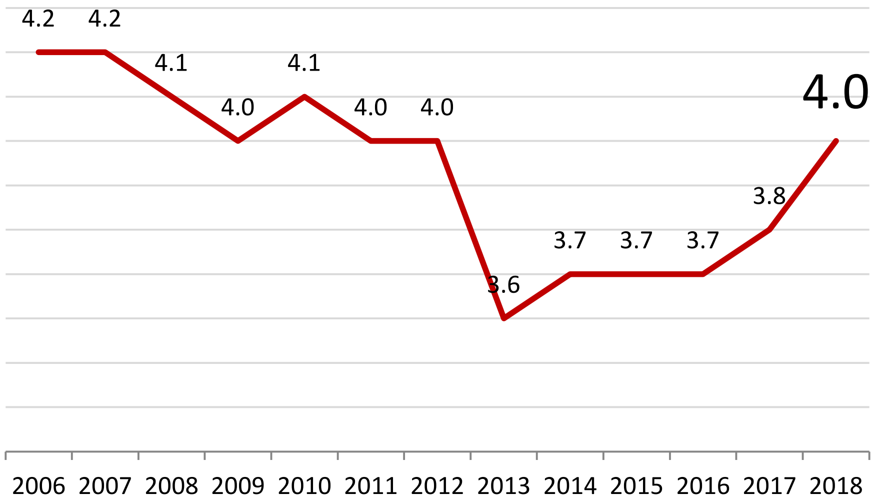
Buy a handful of cuts/kinds, but willing to try new items, if advised

17%

Buy an extensive variety of cuts/ kinds

3) Meat continues its comeback, but room to improve

Home-prepared meals with meat/poultry in a typical week



- 1-3 meals 40%
- 4 meals 34%
- 5-7 meals 26%

What can we learn from this group?

And how can we apply those learning to the 1-3 meal group?

One simple, yet powerful formula

Enhanced meat knowledge

=

Greater variety purchased

=

Cooking with meat more often

=

Greater per person spending

More store trips

Greater store loyalty

And the beauty of it?

- Lack of meat knowledge and thirst for advice cuts across demographics
  - Enhancing shopper confidence pays off across stores
  - Even greater opportunity among Millennials

- But the challenge?
  Shoppers who lack meat knowledge shop far less often
  - Connecting beyond the store

Food for thought

- People want variety
  - Skill drives in-home dinner/meat variety
  - Lack of skill often equates to eating out
- Most effective way to communicate
  - In and outside the store
  - Traditional and digital platforms
  - In-person
- Teaching knowledge AND skills
  - Engage, not just educate
  - Show, taste and entice

Customer service will be key in shopper education and changing up routines, while also creating competitive advantages.

PEOPLE POWER

Digital is shoppers' top resource

Top resource for meat preparation advice

47% Digital resource
- **37%** Recipe websites/apps
- **10%** Pinterest, Instagram or other social media

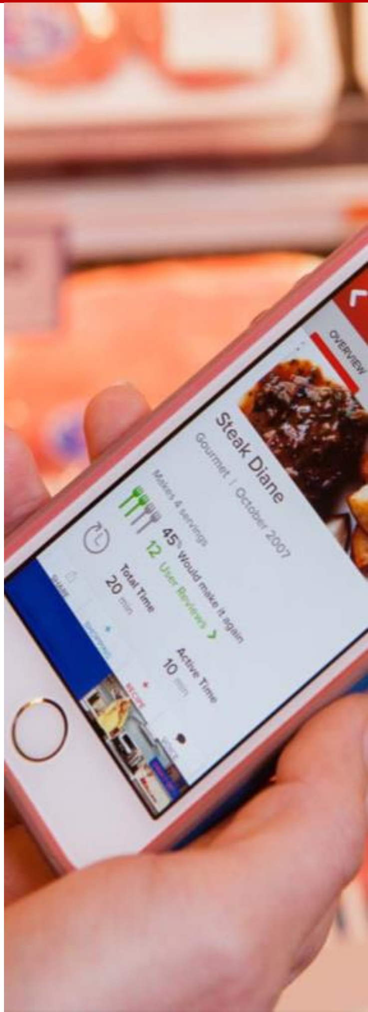
17% Mom/friend/family

12% Cook book

7% Butcher/meat dpt

6% Just give it a shot

5% On-pack info



We have to become more relevant

Millennials 18-26	26-37	Promotional platforms	Boomers
36%	29%	Recipe/cooking websites/apps	40%
24%	15%	Mom/family/friend	15%
7%	11%	Cook book/paper resource	17%
13%	17%	Pinterest, Instagram/social media	4%
4%	8%	Butcher/meat department	7%

The meat case = routine purchase

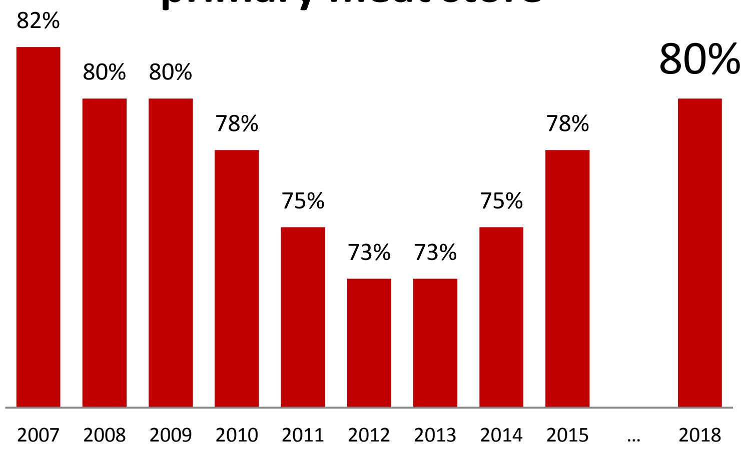
71%

Of purchases are self-selected from the meat case

Unassisted purchase at the meat case unlikely to inspire something new!!

1. Capitalize on the value of a full-service counter

Availability of full-service counters at primary meat store



Primary store access to counter

Has service counter (80%)

- 72% Glad it's there
- 28% Fine if they'd take it out

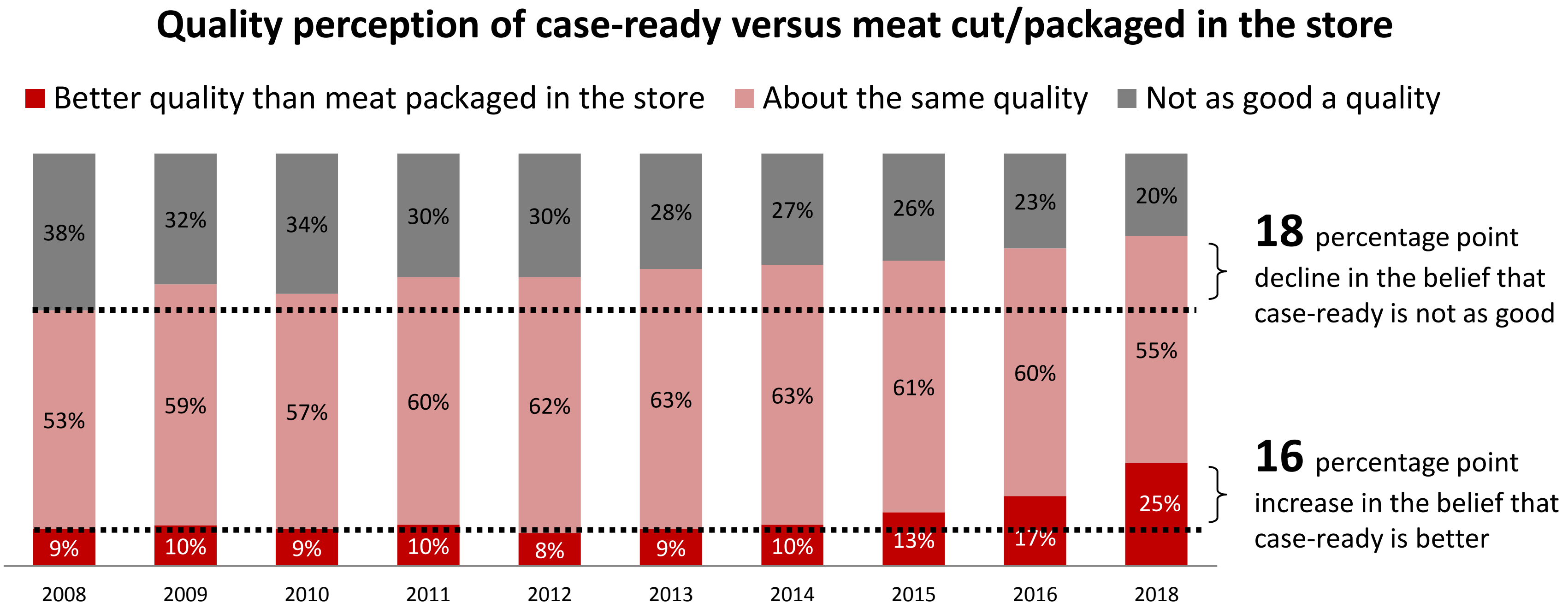
No service counter (20%)

- 64% Wish it did
- 36% Fine by me

Find ways to start a conversation

Borrow the “chef angle” idea from deli prepared

2. Consider leveraging case-ready favorability to move labor in front of the case



Assistance in the meat case

38%

Important to have someone to assist them in the meat case with customizing amounts, preparation tips or recipe ideas

Not staggering, however…

>50%

- High weekly spend
- Urban shoppers
- Kids in the household
- Nutrition focused
- Millennials

Having available, friendly and knowledgeable staff

Find the best starting points given trial barriers

Based on recommendations from a meat associate, willingness to…

35%

Make a new recipe
w/familiar meat

25%

Try a new cut/kind
of meat/poultry

Based on recommendations from social network, family or friends?

45%

25%

Building a trusted household name

One tweet,
blog, vlog, post,
snap, pin, and
tv appearance
at a time.

3. On pack recipes can be another tool to connect

36%

Influence of in-store or on-pack recipe/meal ideas on the kind/cut purchased

No silver bullet, however…

>50%

- High weekly trips
- Urban shoppers
- Millennials
- Kids in the household
- Men

Food for thought

- Position butchers/meat associates as the “Chef” of the meat department
- Solve the problem of the day, moment, the meal or the specific shopping trip
  - Find logical starting points
  - Building trust takes time
- Self-selection is not likely to change buying habits
  - Truly leverage the value of the service counter
  - Have people in front of the case
  - Offer customization, tips, recipes and solutions

Competition is ever growing with new banners and new channels vying for the meat dollar. Online ordering provides opportunity, but differentiation and clear brand positioning is more important than ever.

SHOPPING REINVENTED

Meat/poultry are a supermarket stronghold

Primary outlet for 57% of meat shoppers; 2.5x higher than next largest

	Supermarket	Supercenter	Limited assortment	Club	Organic/ specialty	Other
Primary store groceries	50%	34%	7%	5%	2%	2%
Primary store meat and poultry	57%	22%	5%	7%	4%	5%

Supermarkets reign through better conversion and being the primary destination of switchers

Primary grocery channel
≠ primary meat channel

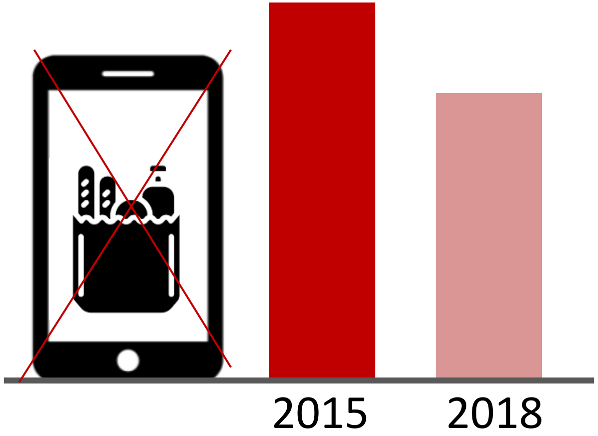
22%

Down from 27%

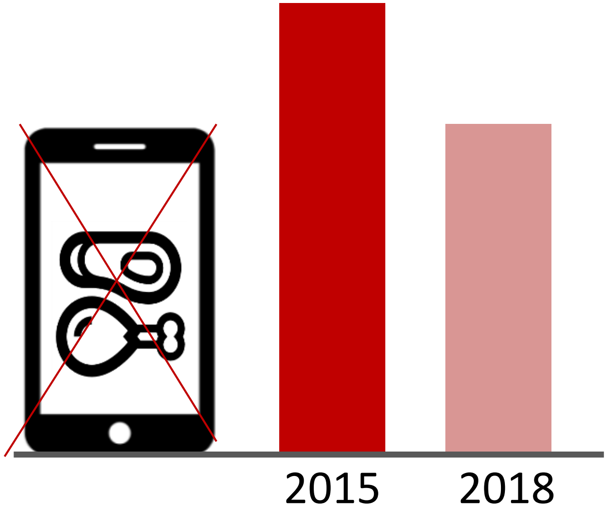
14% for supermarkets
37% for supercenters

	2018
Supermarkets	54%
Butcher stores	15%
Clubs	13%
Supercenters	5%
Specialty/organic	9%
Other	2%

Hesitance to buy groceries online is declining

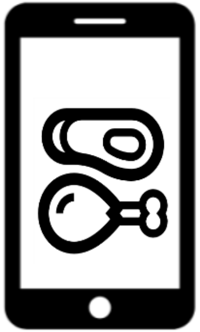


Don’t buy **81%…62%** groceries online



Don’t buy **96%…81%** meat online

In fact, hesitance is turning into willingness to try



19%

have bought meat online at least once; 15% from their primary meat department and 14% from an online company

Primary meat department

30% Very willing to try

27% Somewhat willing to try

28% No thanks

An online-only food/meat vendor

23% Very willing to try

27% Somewhat willing to try

38% No thanks

Along with greatly diminished concerns

Concerns with ordering meat online

62% Want to select myself	**48%** Lack of freshness ↓ from 66%	**44%** Safe transit ↓ from 48%	**37%** Poor quality ↓ from 49%
32% Not according to preference ↑ from 25%	**27%** Previously frozen ↓ from 40%	**20%** Difficult to browse ↓ from 23%	

Food for thought

- A new retail era with infinite ways to buy meat
  - New competitors and new banners, many focused on fresh
  - People are starting to buy meat online. Leverage the trust shoppers have in your meat department/brand
  - Understand your new competitive set
  - Trading out of the department is competition too!

- Have clear positioning, as a brand and as a meat department/banner
  - The middle of the road is for road kill
  - Match to the core consumer
  - Signature items drive loyalty

Brands will play an increasingly important role in the battle for the meat dollar, particularly online. Outright preferences are rising and should be leveraged for a unique and tailored offering.

BRAND PREMIUMIZATION

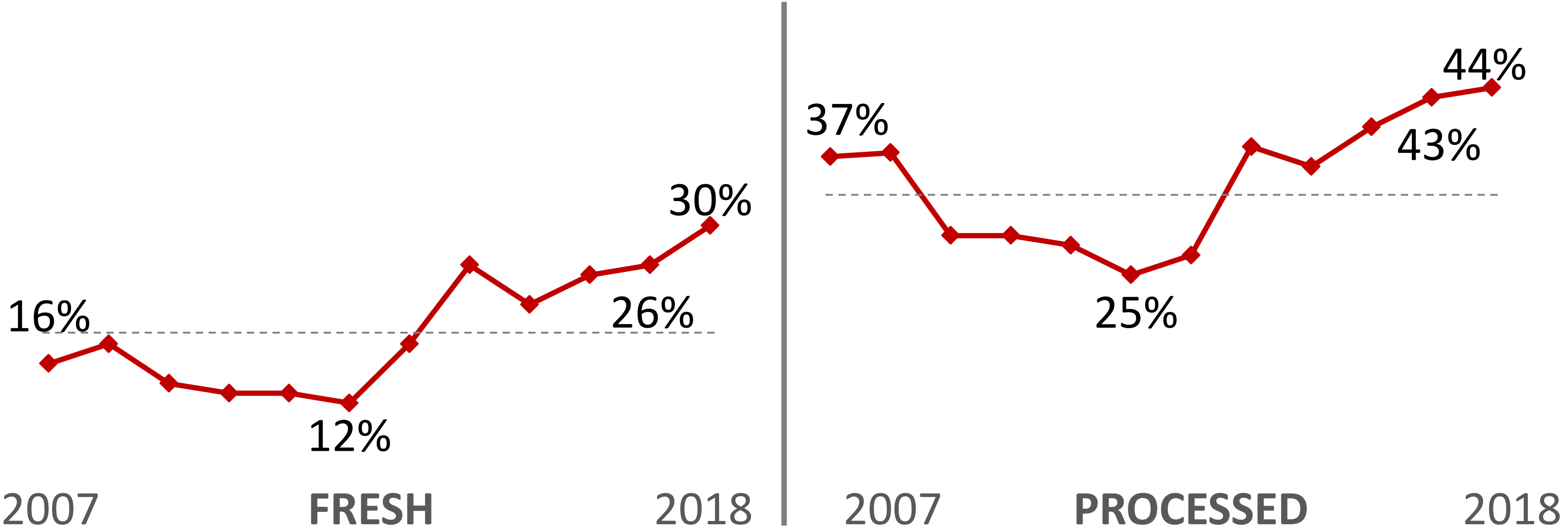
Brands continue to strengthen their preferred status

Fresh brand neutrality down to 50% in study first

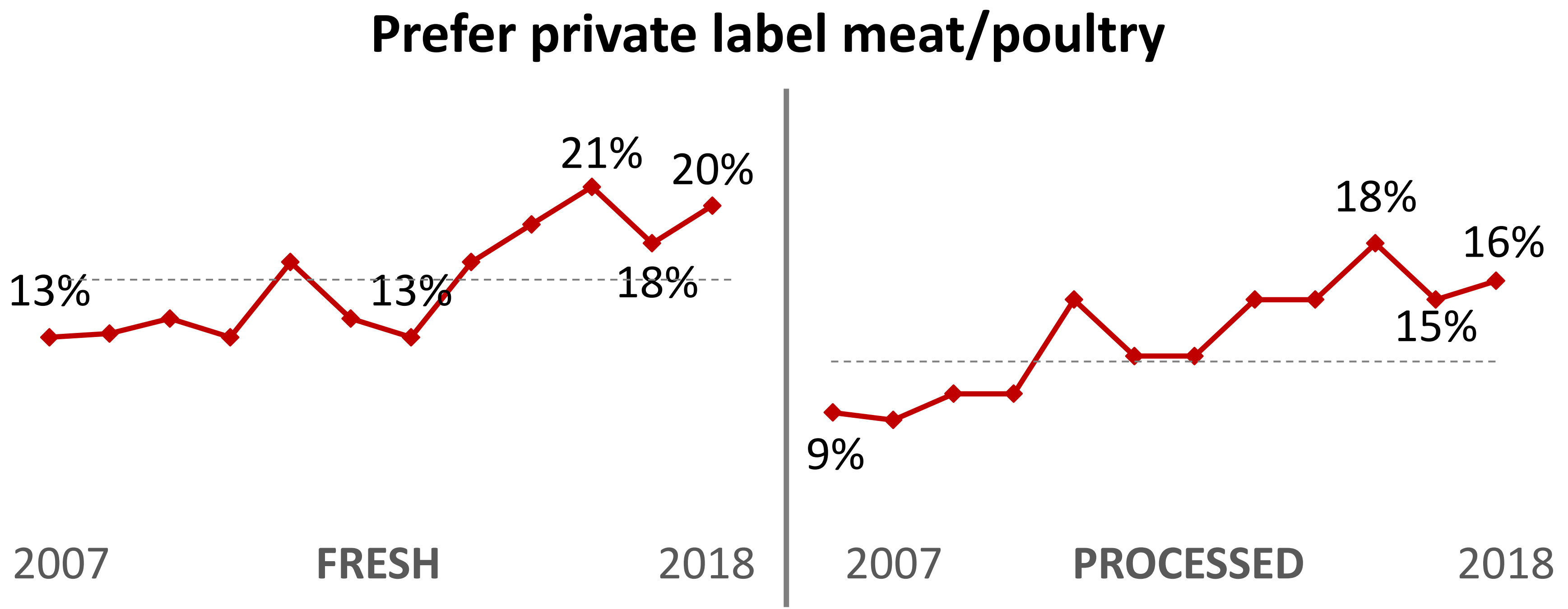
Consumer preference	Fresh 	Processed 
Manufacturer brand	30%	44%
Private label	20%	15%
No brand preference	50% …↓ from 74%	42% …↓ from 63%

Manufacturer brand outright preference at study high

Prefer manufacturer brand meat and poultry



Private brand grows outright preference at slower pace



Why brands, you ask?

63%
Inclination to buy familiar brands

48%
Better quality

43%
Better value

36%
Better consistency

27%
Confidence in safety

20%
Better shelf life

9%
Animal welfare stance

Promotions can drive brand trial

62%

Promotions would influence the purchase of a brand the shopper normally doesn't buy

Are you telling your brand story effectively?

- In the ad
- Online
- Through social media
- In the meat case
- Throughout the department
- Through your associates

Food for thought

- Online and offline strategy
  - Preference crucial in online world
  - What if you didn’t make the first cut?
- Create a unique assortment of large, small and private brands, curated to match the audience
- Animal welfare, labor and environmental sustainability look to be strong future consumer interest platforms

Many brands have focused in on transparency, with great success. Claims are driving growth and increased awareness would drive further purchase likelihood.

ETHICAL LIVING

Transparency is driving new dollars

Meat with claims
+4.8% | +5.1%

No claim
-0.1% | +0.1%

	$ CAGR	Volume CAGR
Organic	+10%	+12%
Hormone/antibiotic-free	+10%	+9%
Natural	+3%	+4%
Grass-fed	+6%	+11%
Free-range	+5%	+1%

 Source: Nielsen, Total U.S. Food, 52 wks ending 11/25/2017

Natural is the largest segment with the highest awareness

Have seen on packages of meat/poultry

All-natural
Organic
Grass-fed

Hormone-free
Antibiotic-free

Free range

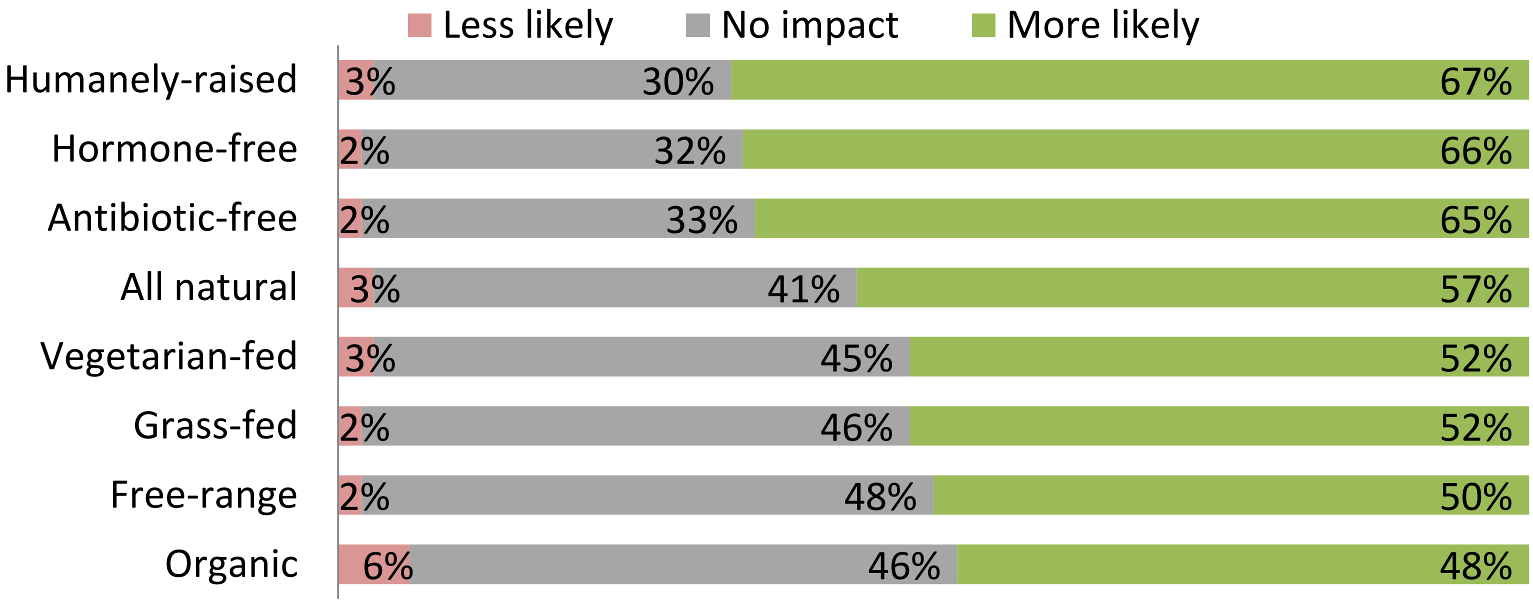
Humanely-raised

Vegetarian-fed

While Millennials are less likely to have noticed claims, they are much more willing to buy them

Awareness often prompts purchase likelihood

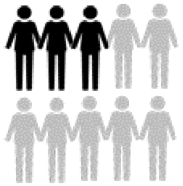
Impact of claims on likelihood to purchase over a conventional item



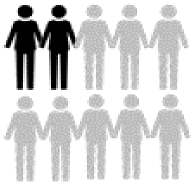
Shoppers still looking for more

Attributes shoppers want their meat department to carry more of

- Raised in the USA
- Antibiotic free
- All-natural
- Hormone-free/no added hormones



- Grass-fed
- Non-GMO
- Raised locally
- Organic
- Humanely-raised



- Vegetarian fed

The "data vs. insights" debate: be relatable without overwhelming shoppers with claims

Go beyond on-pack to reach high-target audiences

Food for thought

- More shoppers seek out information
  - Great cross-marketing of claims opportunity within meat
  - Great cross-marketing/merchandising opportunity across the store
  - Claim awareness is the all important step 1; educate beyond pack
- Ethical living goes beyond transparency production/sourcing claims
  - Packaging choices
  - Animal welfare, raising practices, labor and environmental sustainability likely to gain prominence
- Consumers rely on retailers as curators of sustainable products

In addition to ethical living, healthy living is driving dollars across the store. Nutrition-focused meat shoppers de-emphasize price and look for the industry’s helping hand in making healthful choices.

HEALTHY LIVING

Nutrition-focused shoppers are valuable

Effort in choosing nutritious/ healthful meat/poultry

30% A lot

46% Some

22% Only a little

2% None

These are shoppers we want!

- Price becomes a secondary factor
- High weekly trips
- High weekly spending

Currently clustered in:

- High-income shoppers

Point of entry:

- Presence of children

Addressing health: moderation, not avoidance

Leaner down 5-percentage points as fat is making a comeback

	Regularly	Never
Leaner cuts	45% ↓	7% ↔
Limit second helpings	41% ↑	23% ↔
Smaller portion sizes	26% ↔	20% ↔
More fish & seafood	23% ↓	19% ↔
More meatless meals/ meat alternatives	18% ↔	27% ↓

The industry can be a helping hand

The call for package size variety is growing louder and louder

72%

Variety of package sizes for portion control

Better-for-you suggestions are welcomed

Higher cost and sacrificing taste named as barriers, help shoppers overcome those

59%

BFY suggestions that don't cost more

54%

BFY suggestions without sacrificing taste

Information and callouts liked by two-thirds

Older Millennials have the highest interest

65%

Dietary callouts and information

Retail dietitians liked by one-third

Demonstrate value with relevant age-relevant tips

36% → **51%** Millennials

20% Boomers

Retail dietitian/ nutrition expert

Protein and fat most desired information

Prominently highlight on meat/poultry packaging:		18-25	Boomers
Protein	54%	67%	42%
Total fat	50%	50%	53%
Sodium	45%	39%	52%
Saturated fat	41%	34%	51%
Cholesterol	40%	30%	50%
Calories	39%	38%	44%
Iron	26%	29%	19%
None	12%	5%	16%

Other categories continue to "outdo" us in protein

*To the gym? Help your muscles recover with protein

Play into diet trends

Food for thought

- Engage shoppers in meat
  - Provide nutrition information
  - Nutritionist/dietitian tips
  - Make it easy to find information
  - Make sure your staff is informed

- Highlight meat/poultry benefits
  - Promote protein content
    Promote protein-rich meals on front of pack and in-store
  - Tailor benefits to personal health goals/needs

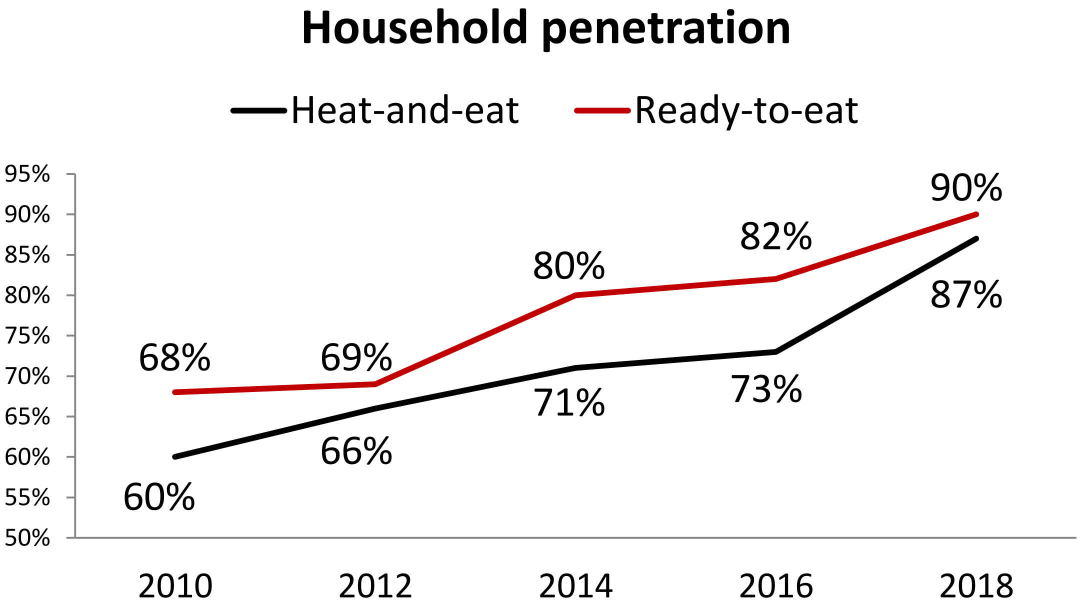
- Provide moderation options
  - Better to moderate than to be eliminated

Nutrition-focused shoppers closely overlap with convenience-seeking shoppers. Value-added, fully-cooked meat and meal stations are of high interest to shoppers willing to pay more to save time.

BUYING TIME

Heat-and-eat and ready-to-eat gain YOY

Fully cooked = $3.6B segment | +1.7% in dollar sales | +3.2% in volume sales



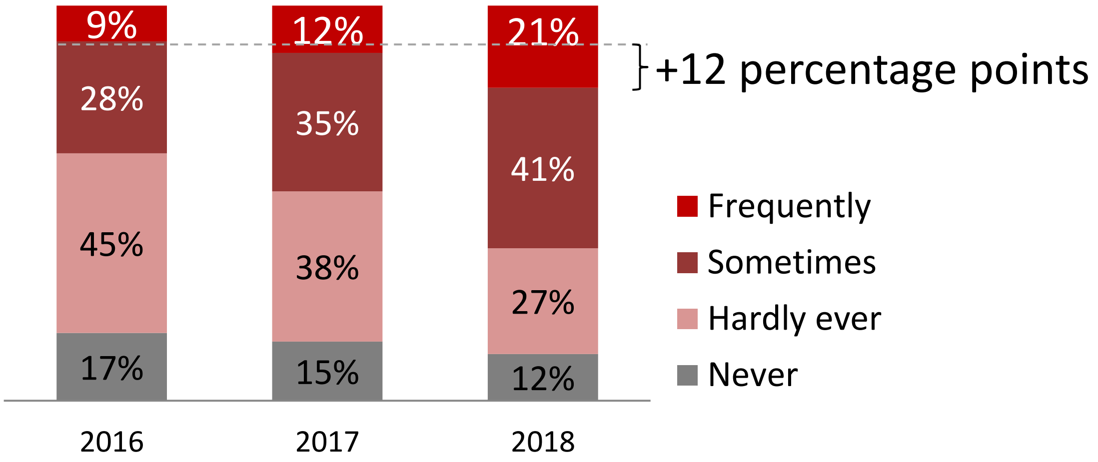
42%

Of consumers want to see their primary meat store add more fully-cooked meat

Value-added is poised for growth

Important and valuable shopper segment

Frequency of purchasing value-added meat/poultry



Frequent users

High weekly spend

Online engagement

Urban

Kids in household

Nutrition-focused

High-income

Shoppers indicate growth is likely

88%

Of consumers can be enticed to purchase more value-added meat

How?

60% Better prices

36% Greater meat assortment

32% Insight into the quality

29% Insight into the meat's freshness

29% When it was prepared

27% Greater flavor variety

This convenience-focused shopper also values cross merchandising full meal ideas

45%

Of shoppers like the idea of meal stations with all items for "tonight's dinner"

High interest shoppers

Frequently buy value-added

High income

Urban

High weekly spend and trips

Supercenter shoppers

Nutrition-focused shoppers

Kids in household

Many solutions for "buying time"

Value-added

Meal stations

Fully-cooked

Meal replacement

Meal kit

But deliver true convenience, not just the components

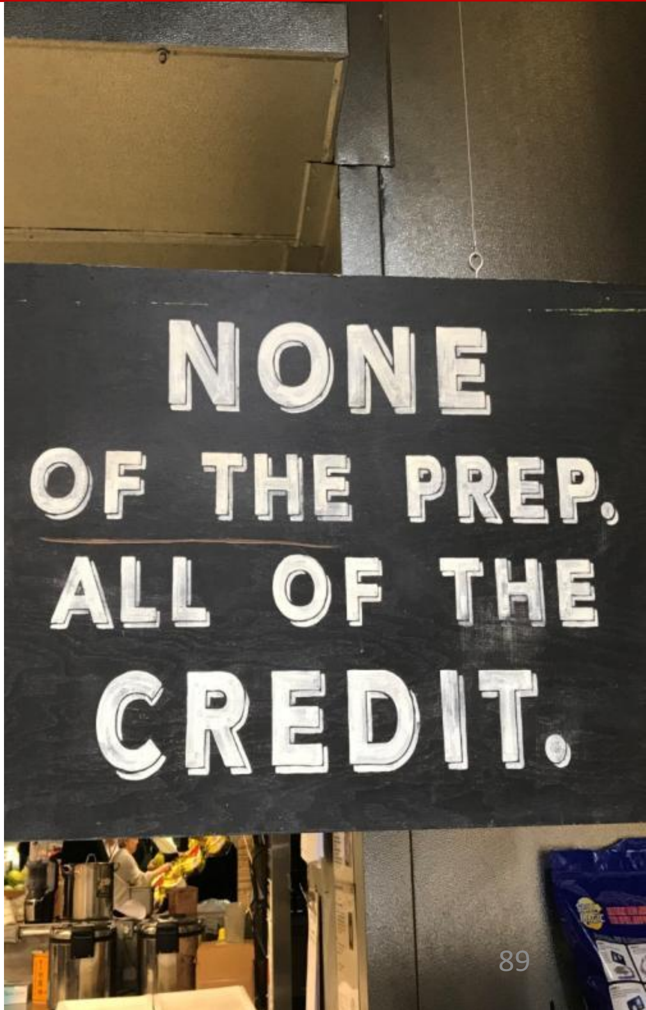
Cross merchandising ideas

Separate case for speedy items

*Vlugklaar = ready fast

Food for thought

- Shoppers willing to "buy time" are valuable, de-emphasizing price and spending more
  - Offer true convenience not just the components
- Convenience starts pre-trip and includes cooking and cleanup
  - Remind shoppers of the benefits
- In value-added and fully-cooked meat, seek to overcome barriers
  - The grade/quality/safety measures used
  - Health and wellness/nutritional callouts



Last, but not least, shoppers provided more than 800 comments on how to improve their meat shopping experience

IMPROVED SHOPPING

Four areas of improved shopping

1. More clarity on product quality and freshness to accurately judge value

- *In marinated meat, show the grade or fat %*
  so I know you’re not covering up crappy meat.
- *Make sure meat is fresh, so it lasts after I buy it.*
- *Quality matters more than anything else.*
- *Make sure the expensive stuff is really good,*
  so I don’t splurge on steak and it’s tough.

Four areas of improved shopping

2. Greater variety, including pack sizes, cuts/kinds and specialty items

- *More variety in the thickness of the cuts in pork and beef*
- *Increase availability of more atypical meats (venison, elk, rabbit, etc)*
- *Please stock at least one organic, humanely raised and free-range option for each type of meat.*
- *More small selections for seniors like small briskets, etc.*

Four areas of improved shopping

3. Better pricing and promotions

- *Better prices, though we started buying the store label and it's great.*
- *Have better price tags, more visible/bigger fonts.*
- *More variety in the types of meat they have specials on. Most common types of meat on sale tend to be chicken, and a large part of my meat-purchasing decisions is influenced by what is on sale that week.*

Four areas of improved shopping

4. Operational excellence, with a focus on better customer service, more information and outreach, packaging innovation, better in-stock performance and cleanliness

- *Be more available. I have to chase the guys around to get a question answered!*
- *Better packaging. I can't stand it when chicken leaks all over my food.*
- *Better information on real meaning of the label terms. For instance, what is grass fed? Don't cows eat grass, period?*
- *Keep it very clean, the packages, the fridges and the people.*
- *Have more, some days you go in and they are out of everything you need.*
- *Put all organic together, all antibiotic-free, etc. Just like in produce.*

Retailer Perspective

1. Overall Meat Sales are at the same level despite headwinds

2. Consumers will increase variety and consumption. BUT…Only if we engage them at point of sale. They need information to encourage them to buy outside their normal buying habits

Download your copy of the report/deck

- Top 10 handout
- Report: www.meatconference.com/2018POM

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thank you!