MIDYEAR Power of Meat 2020

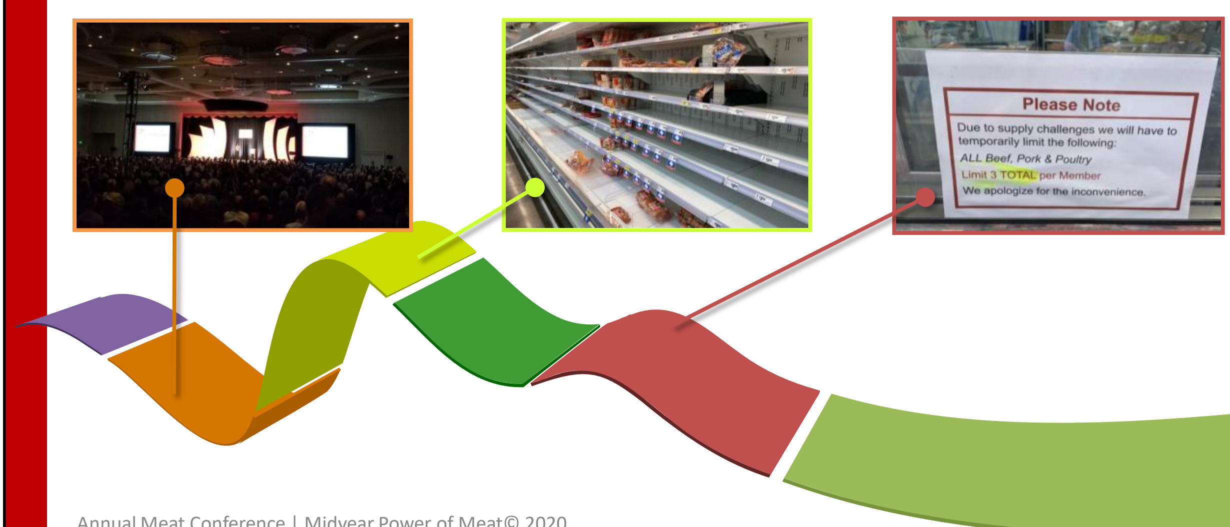
An in-depth look at the meat retailing through the shoppers' eyes

Presented by:
Anne-Marie Roerink | 210 Analytics

Made possible by:
CRYOVAC
BRAND FOOD PACKAGING

From a record AMC to an empty meat case

An unprecedented roller coaster ride since we returned from Nashville



PoM 2020 still as powerful as ever, but…

Important to understand pandemic motivations and outlook

- What changed and why?
- Which purchases were situation-driven versus intentional?
- Which changes may have staying power?

The Midyear 2020 Power of Meat

- Consumer survey
  - August 2020 among 1,006 shoppers
  - Building onto the 2020 Power of Meat, the 15th in an annual report series
  - Made possible by Cryovac
- Real-life overlay by IRI
- For the industry by the industry

ANNUAL MEAT 2020 CONFERENCE

CRYOVAC® BRAND FOOD PACKAGING

210analytics

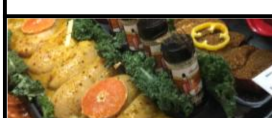
IRi

Study taskforce

A big thank you to all of you who help make POM a success year after year

TARGET, COBORN'S INC est.1921 employee owned, LUNDS&BYERLYS, Albertsons, heinen's GROCERY STORE, Kroger, Bristol Farms, UNFI BETTER FOOD. BETTER FUTURE., NATIONAL CHICKEN COUNCIL, Associated Wholesale Grocers, C&S Wholesale Grocers, VERDE, BELMONT MEATS, SCHWEID & SONS THE VERY BEST BURGER, CERTIFIED ANGUS BEEF BRAND, SunFed RANCH, National Beef, THOMAS FOODS INTERNATIONAL USA, Cargill, MEYER NATURAL FOODS, Midwest PMS LLC, GREAT RANGE PREMIUM BISON, NH Foods, HUSSMANN, YERECIC LABEL entice•inform•inspire, Allegiance RETAIL SERVICES, LLC Independent together, BEEF IT'S WHAT'S FOR DINNER Funded by Beef Farmers and Ranchers, IRi, CRYOVAC BRAND FOOD PACKAGING, pork checkoff, Elanco, meatingplace

Today's agenda

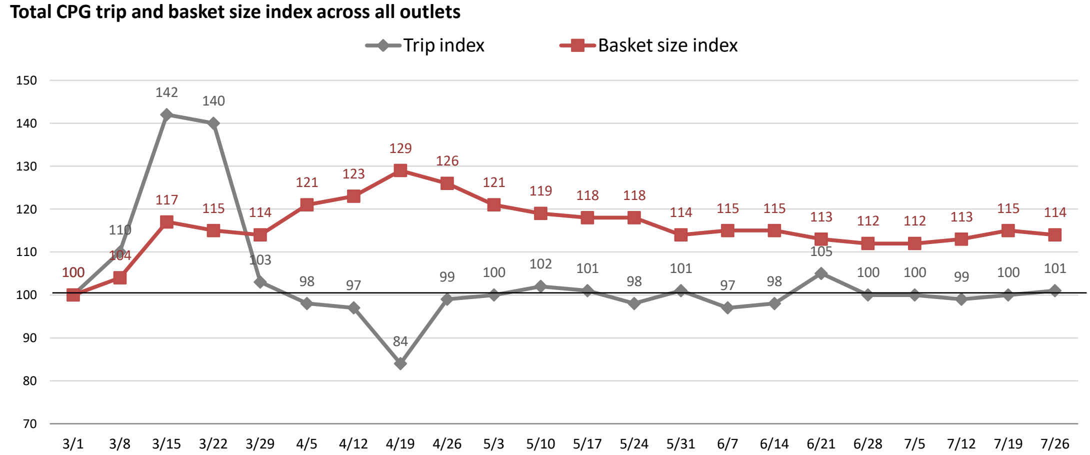
Pandemic sales evolution		**Pandemic meat performance**	
	**Meat consumption**		**Meat purchasing**
Purchase influencers		**Meat channel choices**	
	**Meat industry perceptions**		**A bit of crystal ball**

Pandemic Sales Evolution

Trips fell, baskets grew

Shoppers consolidated grocery needs into one trip, one store

Total CPG trip and basket size index across all outlets

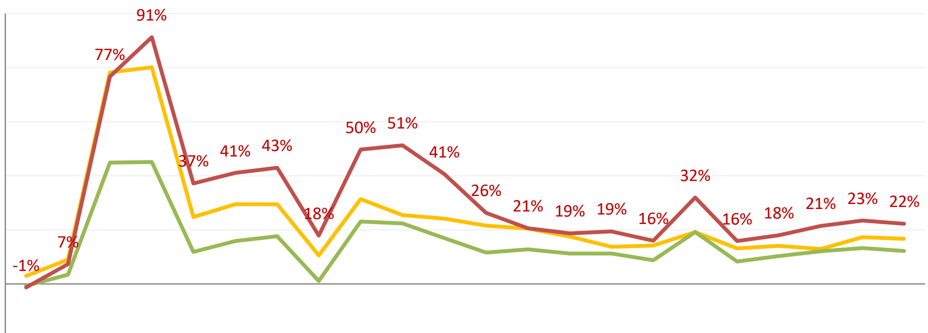


Source: IRI, MULO, % $ growth versus YA

That resulted in sales far above 2019 levels

Center store outpaced fresh, but meat was king

Dollar growth vs. the comparable week in 2019



	3/1	3/8	3/15	3/22	3/29	4/5	4/12	4/19	4/26	5/3	5/10	5/17	5/24	5/31	6/7	6/14	6/21	6/28	7/5	7/12	7/19	7/29
Center store	3%	9%	78%	80%	25%	29%	30%	11%	31%	25%	24%	22%	20%	18%	14%	14%	19%	13%	14%	13%	17%	17%
Fresh perimeter	-1%	3%	45%	45%	12%	16%	18%	1%	23%	22%	17%	12%	13%	11%	11%	9%	19%	8%	10%	12%	13%	12%
Meat department	-1%	7%	77%	91%	37%	41%	43%	18%	50%	51%	41%	26%	21%	19%	19%	16%	32%	16%	18%	21%	23%	22%

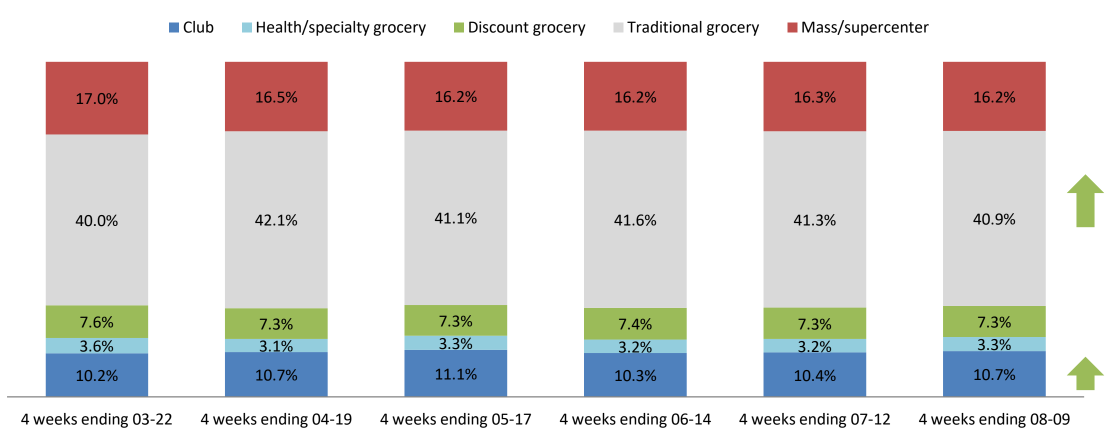
Source: IRI, MULO, % $ growth versus YA

9

Club and grocery increased their share of dollars

Specialty, discount grocery and mass experienced declines amid pandemic

Share of total fresh dollars during the pandemic



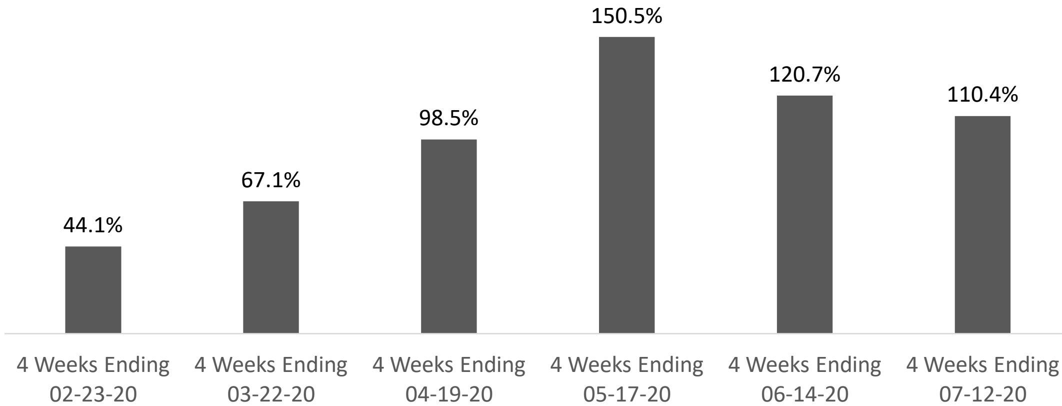
Source: IRI, Household Panel data, 4-week interval share of total fixed and random weight fresh sales

10

E-commerce sales exploded

And that included fresh, though with an initial lag

Fresh foods e-commerce sales growth versus year ago



Source: IRI eMarket Insights for perishable categories (meat, produce, seafood, deli and bakery), dollar sales 4 week growth versus year ago

11

Pandemic Meat Performance

Total meat department

+1.4%

Pre-Pandemic $ growth

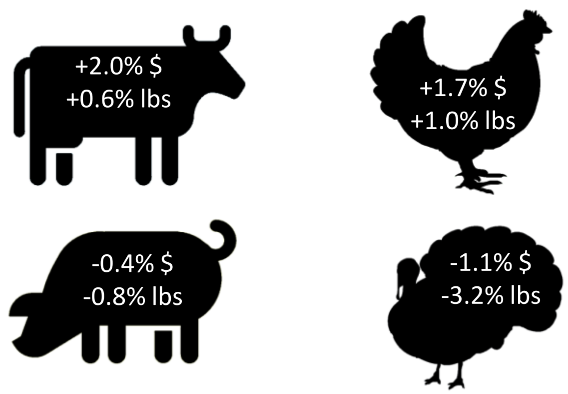
-0.1%

Pre-Pandemic Lbs growth

Source: IRI, MULO, % $ growth versus YA

The pre-pandemic starting point

Fresh meat: $**45.2B**



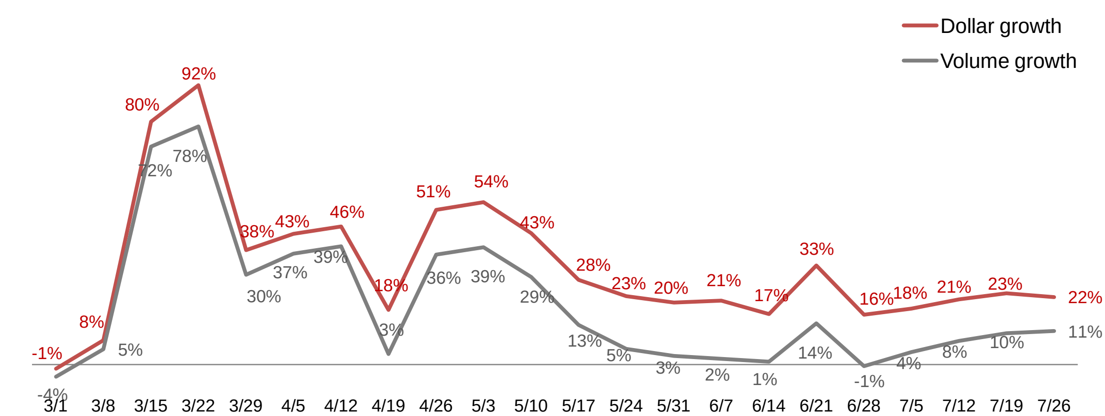
Processed meat: **$14.3B**

+1.5% $ | -0.8% lbs

Meat sales near doubled in mid March

And have been riding above the 2019 levels ever since with dollars > volume

$ and lbs growth meat department vs. comparable week in 2019



Source: IRI, MULO, 1 week % growth versus year ago

Total meat department

+34.6%

$ Growth
Pandemic growth

+21.4%

lbs Growth
Pandemic growth

Source: IRI, MULO, % $ growth versus YA

Pandemic purchasing (3/15-7/26)

Fresh meat: +**$5.9B**

+38.4% $
+20.5% lbs

+24.6% $
+18.0% lbs

+35.7% $
+22.3% lbs

+39.7% $
+35.1% lbs

Processed meat: +**$2.0B**
+35.3% $ | +24.4% lbs

15

Grinds were a pandemic powerhouse

Versatile, easy-to-prepare, cost-effective cuts did well

+40.0%
GROUND BEEF +$1.5B

+34.5%
GROUND TURKEY +$154M

+40.2%
GROUND CHICKEN +$23M

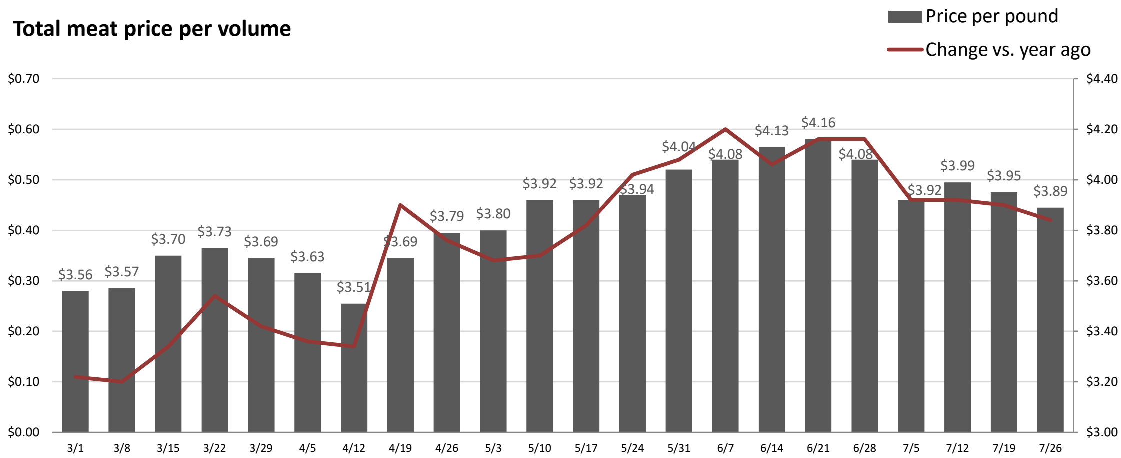
+36.5%
GROUND PORK +$20M

Source: IRI, MULO, $ growth pandemic March 15-July 26, 2020 vs. YAGO

16

Large volume/dollar gaps due to inflation

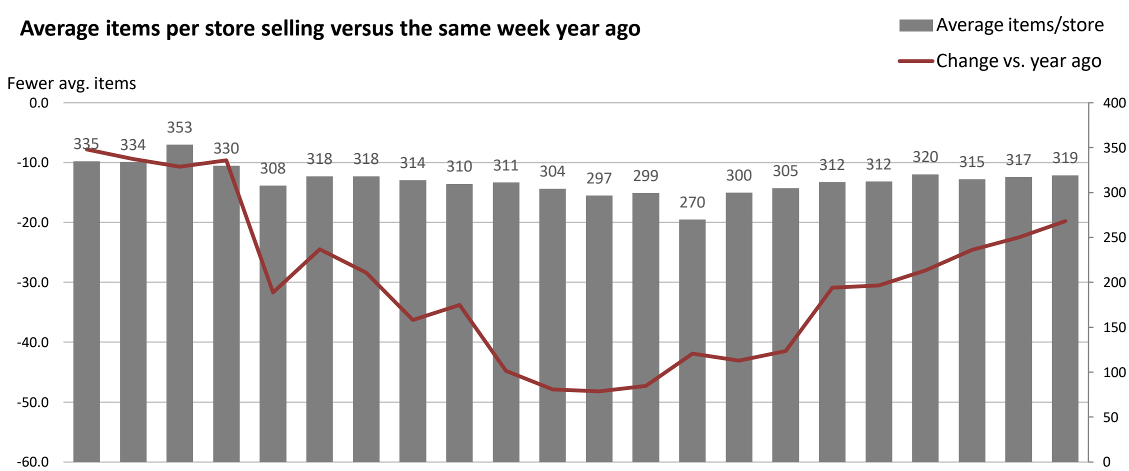
Price per volume peaked the week of June 21, 60 cents above year-ago levels



Source: IRI, MULO, total meat price per volume

Inflation was driven by supply tightness

At its lowest point, down 65 items/store — highest for beef, pork & processed



Source: IRI, MULO, average items per store selling

Soo…How much more is +36% in $ and +23% in lbs?

Astounding amounts of meat flowed through the system

+$3.6B
+389M

+$1.1B
+350M

+$838M
+196M

+$275M
+78M

+$49M
4M

+$28M
6M

That means YTD as of July 26 we are at:

70.7%

of total 2019 sales

+23.9% in dollars
+14.2% in volume

Source: IRI, MULO, gains between March 15 and July 27, 2020 versus YAGO

19

Importantly, meat won on every lever of growth

Household penetration, dollars/buyer, trips/buyer and meat trips

Midyear meat shopping trends (fixed + random weight)

HH penetration	Trips	Spend/trip	Spend/buyer
96.9%	**20.4**	**$15.65**	**$319**
+0.5%	**+13.1%**	**+11.9%**	**+26.6%**

Source: IRI, All outlets, 26 weeks ending 7/12/20 versus YA Meat department, including random and fixed weight

20

Pandemic generational spending

Shares hold from pre-pandemic with a bit of a boost among Gen X

Contribution to every **$100** spent on…

	Millennials	Gen X	Boomers	Seniors
	$24	$32	$34	$9
	$24	$31	$34	$10

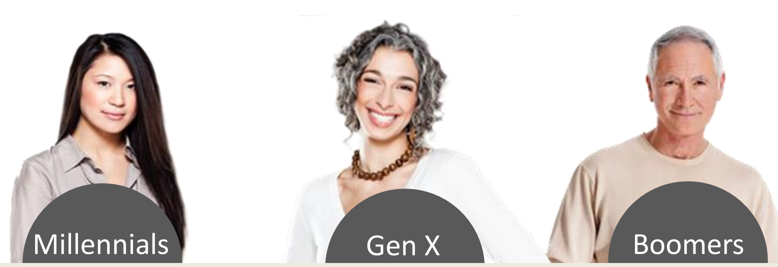
Source: IRI, All Outlets, 26 weeks ending 7/12/20 | meat department spending vs. all edibles

21

Generational shares of new pandemic dollars

Millennials' share of new dollars was far above their current day spending

% of growth in the meat department (new 2020 dollars)



	Millennials	Gen X	Boomers
	32%	**26%**	**31%**

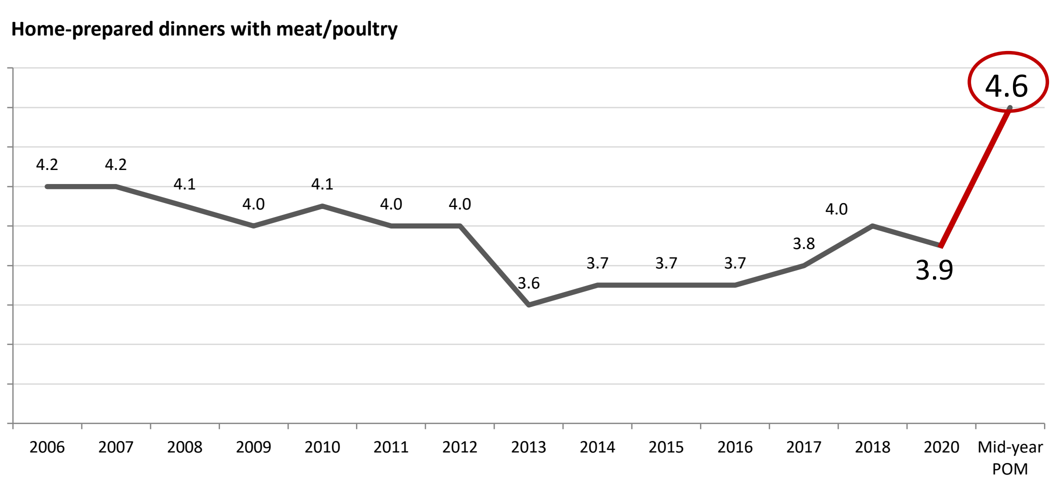
24% of spending, 32% of growth

Source: IRI, Total Outlets, Total RW and FW Meat department, 26 weeks ending 7/12/2020 vs YAGO | Millennials 1981-1997

Meat consumption

Dinners with meat jumped to a study high

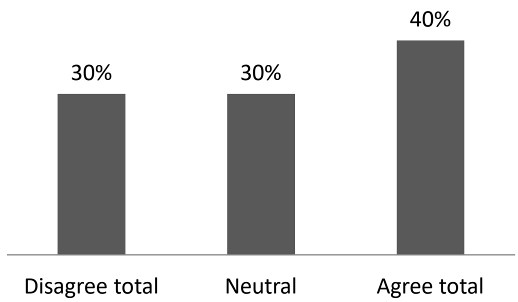
Also consider the breakfast, lunch and snack occasions that moved to at-home



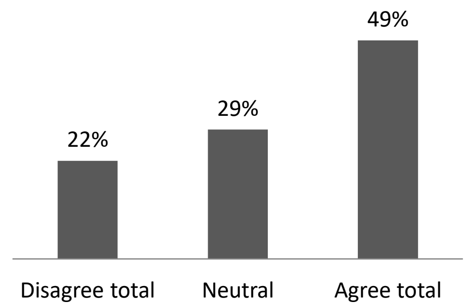
But cooking many more meals is getting harder

63% of families of four struggle with new meal ideas; 54% with meal planning

Meal planning is becoming hard five months into the pandemic



It is difficult to come up with new meal ideas



Eating meat is still the norm

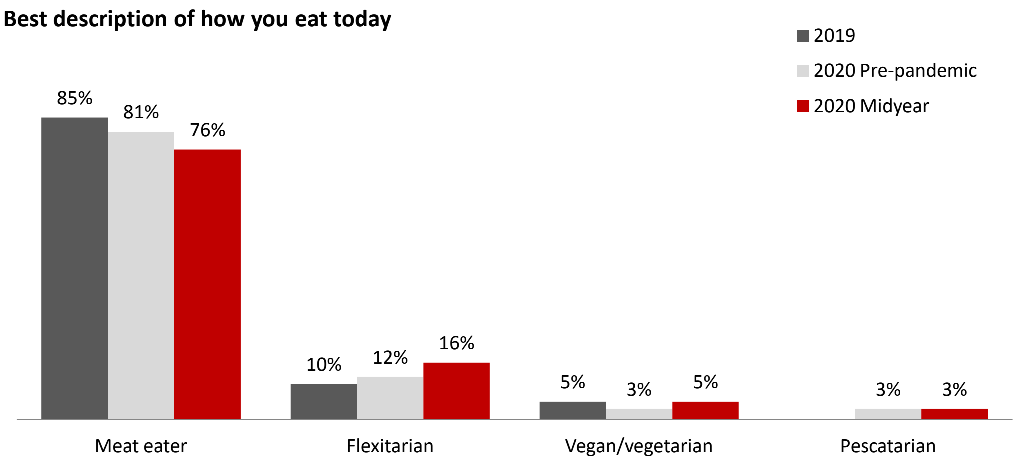
The share of vegans/vegetarians has been around 5% for 15 years

Best description of how you eat today

Meat eater | Flexitarian | Vegetarian/vegan | Pescatarian

But flexitarianism grew during the pandemic

As the swing voters of our industry, it's important to understand *and* keep them

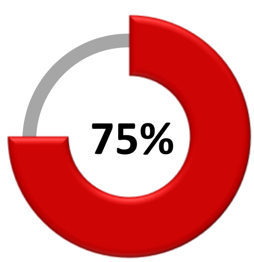


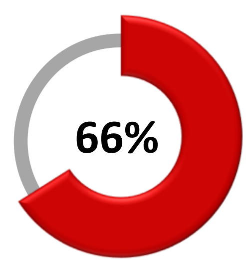
Annual Meat Conference | Midyear Power of Meat© 2020

27

Recognition that meat provides important nutrients

Slightly lower belief it belongs in a happy, healthy, balanced diet





Important source of nutrients

Agreement with meat/poultry is an important source of protein and other nutrients for a balanced diet
↓ 82% in 2015

Part of a happy, balanced diet

Agreement with meat/poultry belong in a happy, healthy, balanced lifestyle;
↑ 64% in POM 2020

Annual Meat Conference | The Power of Meat© 2015 and 2020 and Midyear 2020

28

Large generational differences

Much lower agreement scores among younger generations

% agree (4+5 on 5-point scale)

	Gen Z	Younger Millennials	Older Millennial	Gen X	Boomers
Nutrients	57%	66%	74%	77%	87%
Belongs	59%	57%	63%	69%	75%

Flexitarians' ratings lag too

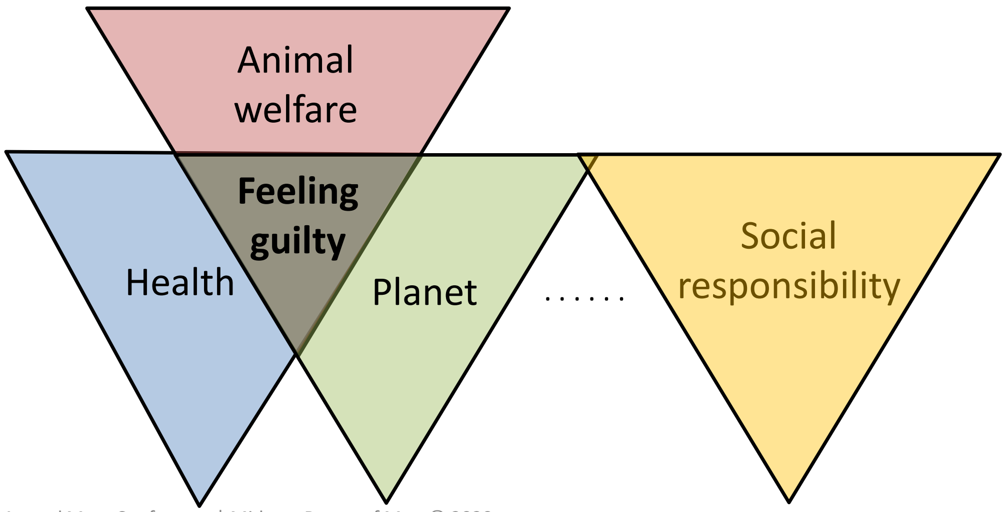
Closing that gap is our first win, increasing both measures our second

	Meat eater	Flexitarian
Nutrients	76%	65%
Belongs	69%	54%

- Flexitarian favorability improved from 50% pre-pandemic
- Buy differently:
  - Claims-based meat
  - Less animal protein
  - Avoid certain kinds of animal protein
  - Eat more plant-based proteins

What drives flexitarians?

Social responsibility could be a fourth area of guilt, elevated during the pandemic



Pandemic meat purchasing

Nearly half of shoppers buy more meat now

Much higher among shopper groups who had greater tendencies to eat out

48%

Of shoppers purchase more meat during the pandemic than they did pre-pandemic

More likely to buy more meat

58% Younger Millennials

52% Older Millennials

56% Households w/kids

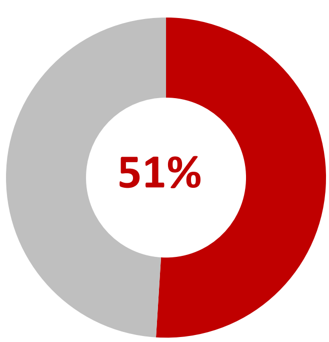
64% Buy meat online

54% Buy value-added

Many also buy different meat than before

Resulting in market share shifts in $and lbs, with gains for smaller proteins

Bought different meat types than usual



More likely to buy different types

62% Millennials

59% Flexitarians

--

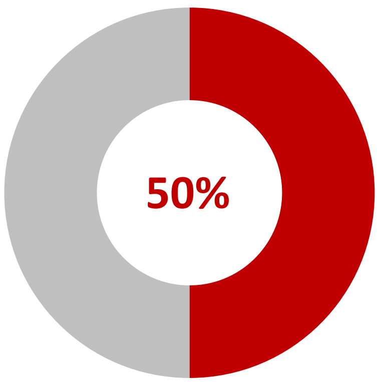
62% Bought claims-based

67% Bought meat online

Half of shoppers also bought different cuts

Once more Millennials are highly likely to have changed their purchases

Bought different cuts than usual



More likely to buy different cuts

- **57%** Millennials
- **55%** Specialty store shoppers

--

- **63%** Bought meat online
- **61%** Bought claims-based
- **57%** Buy value-added

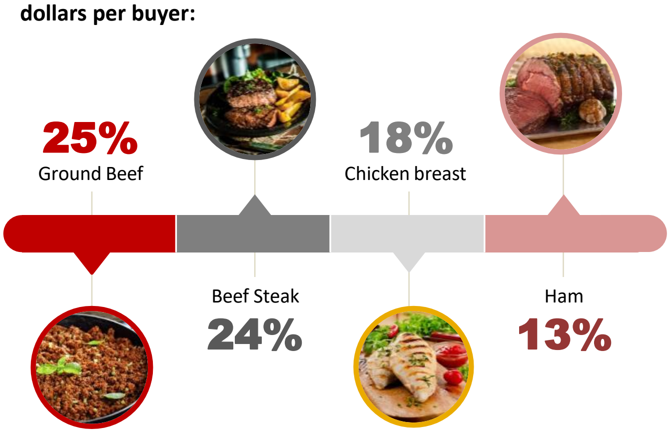
Annual Meat Conference | Midyear Power of Meat© 2020

35

June brought a 15% increase in cuts/buyer

Though important to understand unintentional vs. deliberate

Not one cut accounted for more than 25% of dollars per buyer:



- Cuts with the biggest gains in household penetration:
  - Chicken wings
  - Pork ribs
  - Sausage
  - Ham
  - Chicken breast
  - Ground turkey

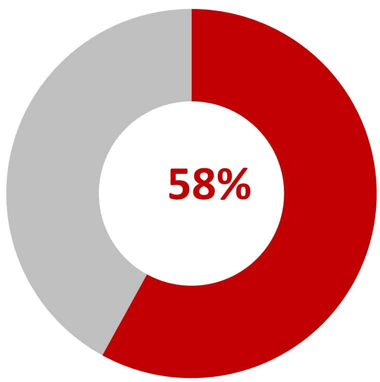
Source: IRI, MULO, June 2020 versus year ago

36

58% bought different brands

Big opportunity to court new shoppers, but also important to connect with existing

Bought different brands than usual



More likely to buy different brands

- **70%** Younger Millennials
- **62%** Older Millennials
- **63%** Households of 3+

--

- **70%** Bought meat online
- **66%** Bought claims-based

Annual Meat Conference | Midyear Power of Meat© 2020

37

Key question: deliberate or unintentional?

Out-of-stocks drove a myriad of protein choice behaviors

91%

Experienced out-of-stocks on meat/poultry during the pandemic

53% Bought a different type than planned
40% Bought a different brand than planned
33% Bought frozen meat/poultry
27% Bought frozen or fresh seafood
27% Went to a different store
25% Ate the meat/poultry stored in the freezer
25% Bought different protein (eggs, beans, etc.)
11% Ordered food from a restaurant
11% Bought plant-based meat alternatives
5% Bought meat from an online seller

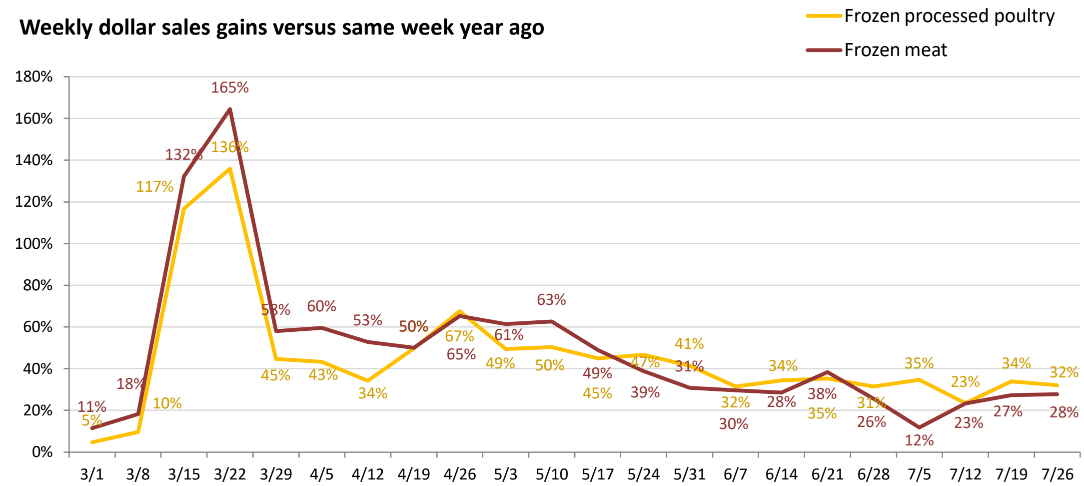
Annual Meat Conference | Midyear Power of Meat© 2020

38

Frozen meat sales have fared extremely well

As have frozen foods generally; meat/poultry/seafood are 30.2% of frozen sales

Weekly dollar sales gains versus same week year ago



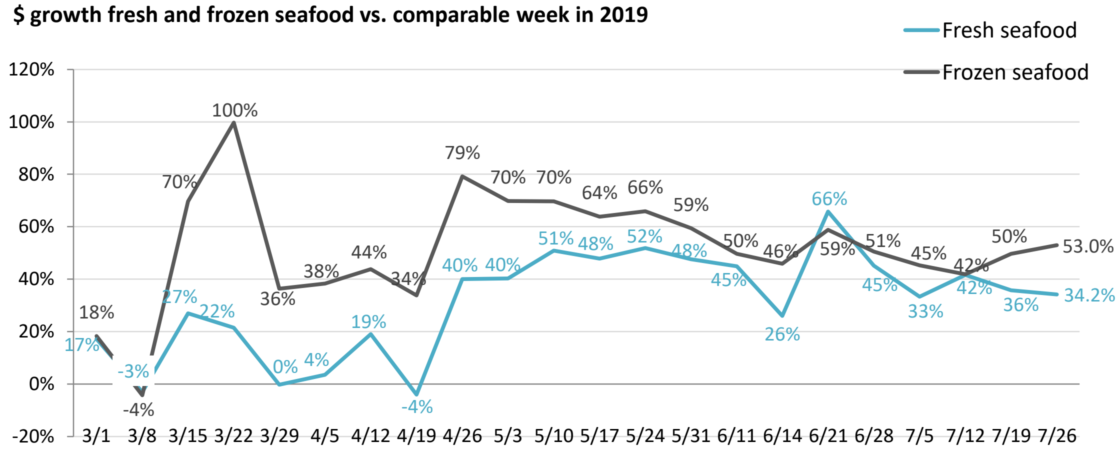
Source: IRI, Total US, MULO, 1 week % change vs. YA

39

Seafood was another pandemic go to

Both frozen and fresh have seen aggressive growth

$ growth fresh and frozen seafood vs. comparable week in 2019

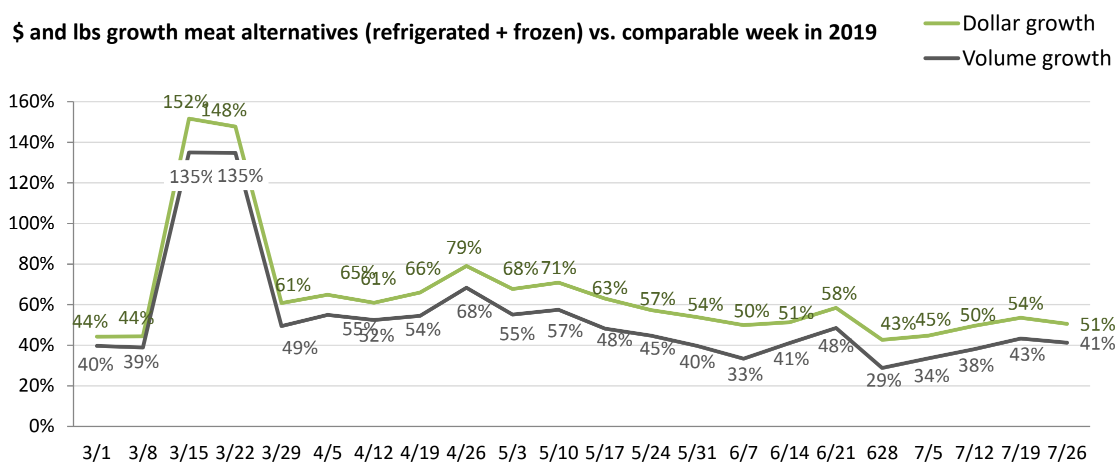


Source: IRI, Total US, MULO, 1 week % change vs. YA

40

Plant-based meat alternatives saw high growth

But off a much smaller base; with dollars outpacing volume

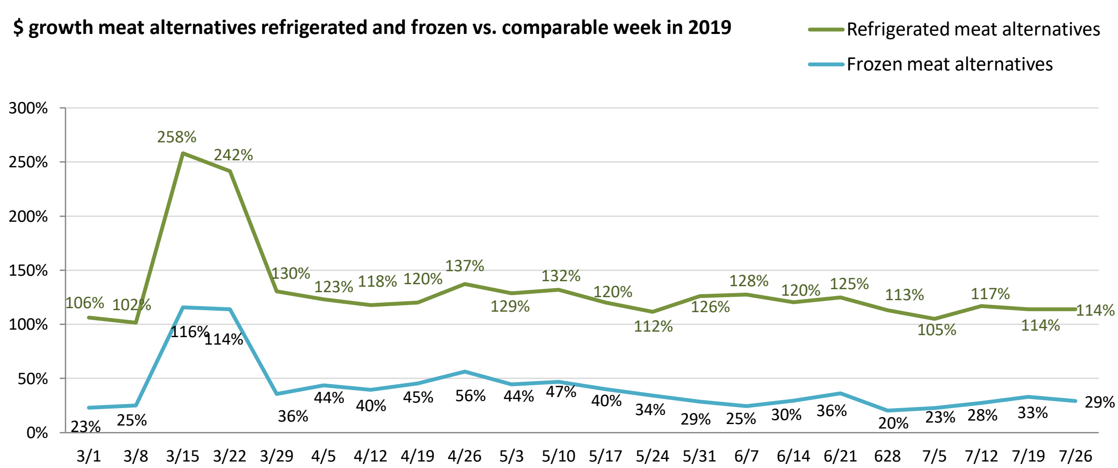


Source: IRI, Total US, MULO, 1 week % change vs. YA

41

Refrigerated outpaced frozen meat alternatives

Refrigerated gained share but frozen represents 2/3 of sales



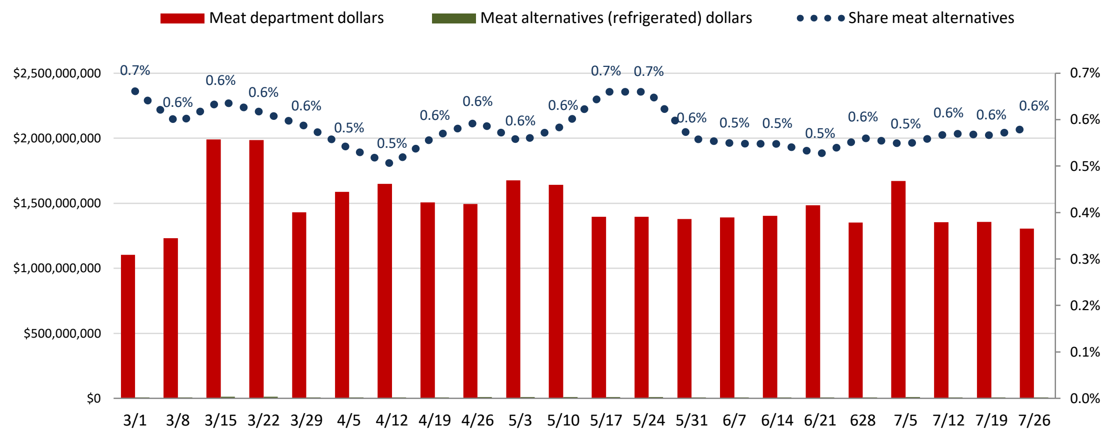
Source: IRI, Total US, MULO, 1 week % change vs. YA

42

Share drops despite growth rates of >100%

Which means plant-based alternative growth coexists with healthy meat gains

$ sales meat department versus refrigerated meat alternatives

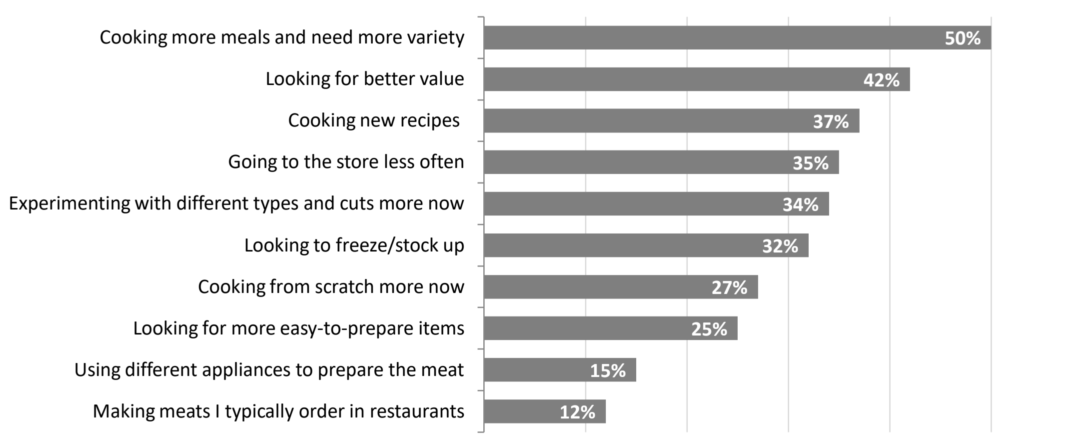


Source: IRI, Total US, MULO, 1 week % change vs. YA

Meat purchases also changed by choice

Because of cooking more meals, value and experimentation

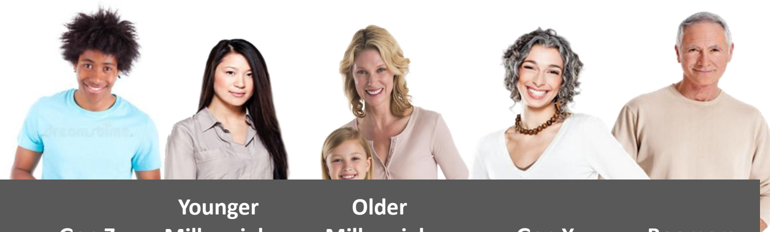
Reasons for purchasing different meat/poultry items than usual



Annual Meat Conference | Midyear Power of Meat© 2020

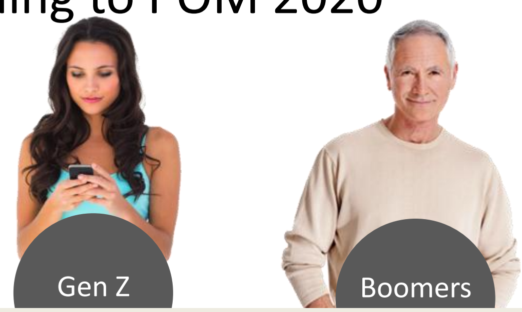
Millennials more likely to explore by choice

Due to experimentation and cooking new recipes



	All	Gen Z	Younger Millennials	Older Millennials	Gen X	Boomers
Cooking more meals and need more variety	50%	**55%**	**55%**	**54%**	44%	35%
Experimenting with different cuts/kinds more	34%	**42%**	**40%**	36%	31%	29%
Cooking new recipes	37%	**42%**	**41%**	40%	31%	33%

Lack of knowledge and confidence had plagued younger shoppers, according to POM 2020

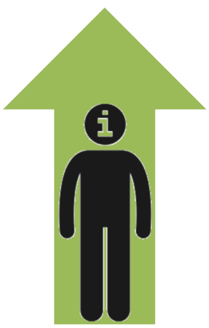


	Gen Z	Boomers
Afraid I will mess it up	58%	16%
Don’t know how it will taste	57%	21%
Don’t know how to cook it	63%	18%

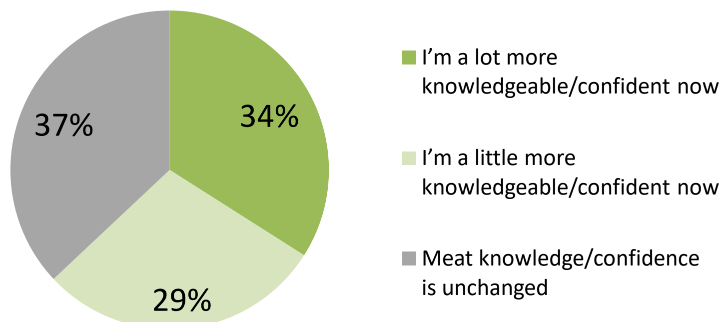
Two-thirds say their meat IQ has improved

Particularly Millennials feel they are more knowledgeable about meat

+63%



Rating of knowledge and confidence to select and prepare meat now versus pre-pandemic



Remember POM 2018:

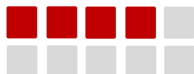
One simple, yet powerful formula

Enhanced meat knowledge
=
Greater variety purchased
=
Cooking with meat more often
=
Greater per person spending
More store trips
Greater store loyalty

Barriers were routine, cost and lacking confidence

Pandemic buying addressed many of these areas

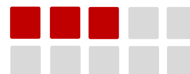
Barriers to trying a new cut/kind of meat/poultry



Creature of habit in what I buy

Creature of habit in what I cook

Many cuts are too expensive



Afraid I'll mess up anything I'm not familiar with

Don't know how it will taste

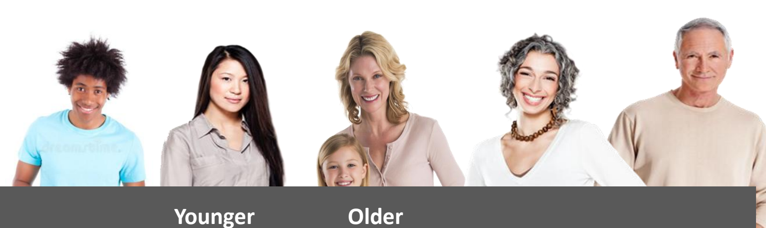
Don't know how to cook it

No one around in the meat dpt. to ask

Don't like to try new things

58% predict they will continue to buy a wider variety

This may benefit meat sales for years, and generations to come



	All	Gen Z	Younger Millennials	Older Millennials	Gen X	Boomers
Go back pre-pandemic meat choices	**42%**	45%	42%	41%	41%	**58%**
Continue to buy differently	**58%**	55%	58%	59%	59%	42%

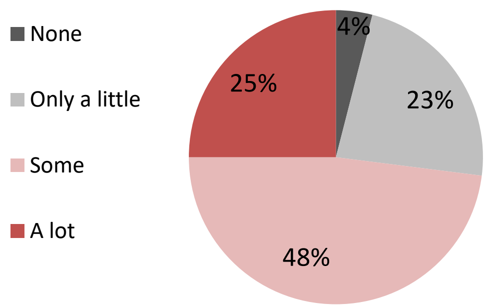
Pandemic purchase influencers

1. Making healthy and nutritious choices

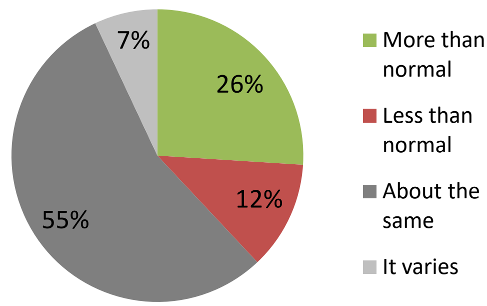
Shoppers still emphasize health amid pandemic

Most shoppers placed equal emphasis on healthy choices

Level of effort in choosing nutritious and healthful meat/poultry choices pre-pandemic



Level of effort in choosing nutritious and healthful meat/poultry options during the pandemic



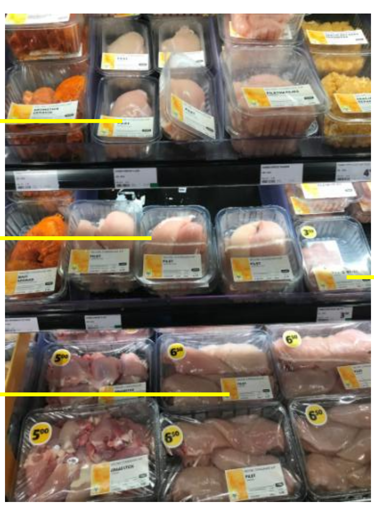
Consider portion size, tips, nutrient highlights

Emphasize that healthful choices can still taste great and don't need to cost more

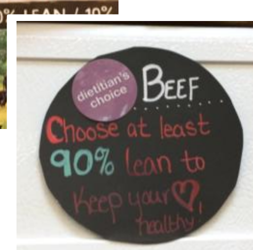
1: €11.19/kg

2: €10.49/kg

Family: €8.13/kg



Cubed: €12.28/kg

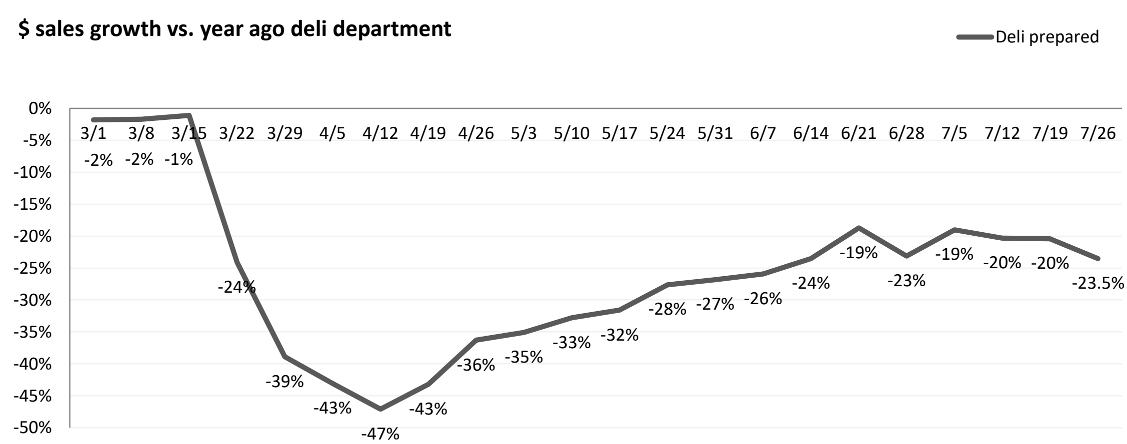


2.

Value-added and
time-saving solutions

Restaurant and deli convenience disappeared

Deli prepared is still making its way back

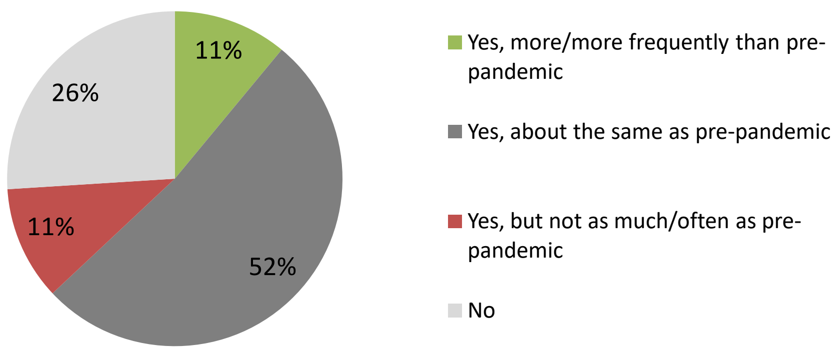


Source: IRI, Total US, MULO, 1 week % growth versus year ago. Deli meat and cheese are non-UPC/random-weight only, Deli prepared foods are non-UPC/random-weight plus limited private label UPC. No third-party UPC/fixed-weight is included in these categories.

Value-added was of interest during pandemic

Bought at about the same frequency, despite lesser availability

Purchasing of value-added items during the pandemic compared with before



Value-added meat had unprecedented growth

Slightly drop in share, but many fewer items given limited in-house production

Pre-pandemic

$ growth **+2.4%**

Share **9.5%**

Amid pandemic

$ growth **+29.2%**

Share **9.0%**

Source: IRI, MULO, 52 weeks ending 2/23 versus YAGO and Pandemic period of March 15-July 26 vs YAGO

Value-added sales was strong across proteins

Turkey saw the biggest turnaround in gains and share

	52-week growth $ growth	Pandemic $ growth	Pandemic $ share	
	+2.9%	+33.5%	8.6%	▼
	-0.5%	+12.6%	7.5%	▼
	+6.3%	+34.4%	14.4%	▼
	-4.8%	+38.6%	12.5%	▲

Source: IRI, MULO, 52 weeks ending 12/01/2019

Value-added can address meal planning fatigue

With a higher trip frequency, cross merchandise for the full dinner solution

Buy value-added meat/poultry sometimes or frequently

Core consumers

- Urban shoppers
- Millennials
- Plant-based integration (blends and alternatives)
- Families with kids
- Higher trip frequency + spending
- Higher-income shoppers

3. Claims-based meats

Claims-based meat grew 32% during pandemic

But size perspective is important

Meat with claims

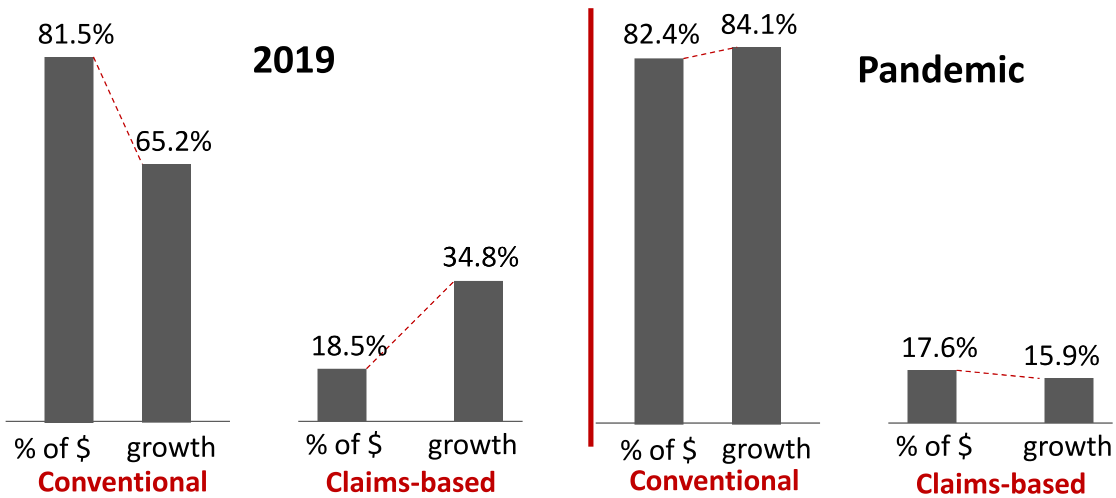
+31.9%

Pandemic period	$	$	Lbs
Total claims-based	**$4.1B**	**+31.9%**	**+19.8%**
Antibiotic claims	$3.0B	+30.9%	+18.1%
Organic	$493M	+35.8%	+33.5%
Grass-fed	$392M	+64.3%	+60.5%

Source: IRI, MULO, Pandemic period March 15-July 26, 2020 versus year ago

Claims based held its own these past 5 months

But unlike pre-pandemic, it was conventional that delivered above its share



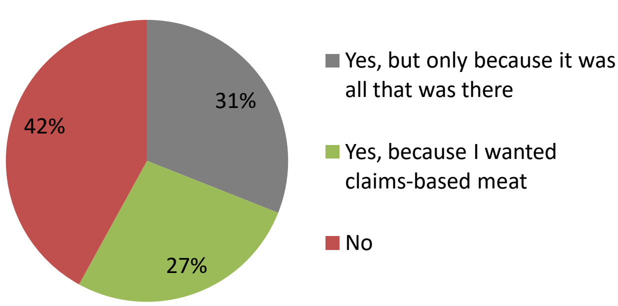
Source: IRI, MULO, 52 weeks ending 12/1/2019 and Pandemic period March 15-July 26, 2020 vs. YAGO

63

Amid pandemic, fan base persists

More people bought claims-based but unintentionally

Purchasing of claims-based meat during the pandemic



- Intentional purchasers closely match core buyers
- **79%** plan to continue to purchase claims-based meat
  - 84% of deliberate buyers
  - 75% of unintentional buyers

Annual Meat Conference | Midyear Power of Meat© 2020

64

The true believer, a small but powerful group

Who address their concerns through purchase claims-based meat

Have kids between the ages of 0-13

Older Millennials, Gen X | avg. age 40

High income, high weekly spending & trips
Favor specialty stores

Flexitarians

De-emphasize price and promotions

West coast and NE skew + metropolitan areas

Elevated focus on health, animal welfare, planet and people

Shoppers seek out production claims

Free-from, all natural and grass-fed are top claims shoppers look for

Attributes shoppers look for when purchasing meat/poultry, at least on occasion

ABF

No added hormones/ hormone-free

All natural

Grass-fed

NAE

U.S.-raised

Free-range/ pasture-raised

Locally-raised

Organic

Humanely-raised

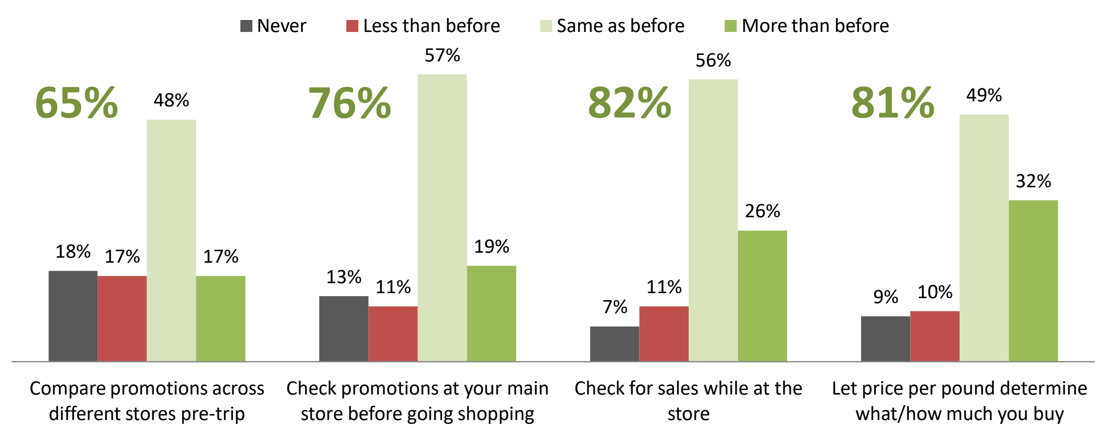
Sustainably-raised

4. Value, price and promotions

Price and value gained in importance

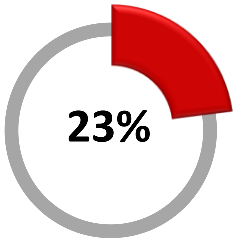
But fewer promotions noted by shoppers

Promotional/price behaviors amid the pandemic



Merchandised sales drops on fewer promos

Biggest drop in promotional share of dollars for antibiotics claims



Merchandised sales

Share of total meat dollars sold
while on promotion
(any merch)

	25.7%	-3 pts
	16.9%	-10 pts
	26.5%	-2 pts
	16.9%	-6 pts

Source: IRI, MULO, 52 weeks ending 12/1/2019 versus pandemic period March 15-July 26, 2020

69

High inflation is putting more pressure on price

Stressing meat/poultry affordability can be a way to drive inclusion

+10%

Retail price/lbs
Increase pandemic
period March 15-July 26

“Lowest price since Oct 2019”

Source: IRI, MULO, Pandemic period March 15-July 26, 2020 vs. YAGO | Pictures: 210 Analytics

70

Reminder: in-store signage + circular lead

Important to raise awareness beyond the store, especially if hi-low retailer

55% In-store promotions	**44%** Circular at home	**42%** Circular in-store
33% Digital circular	**33%** Store app	**25%** Email/ website
11% Social media	**7%** Text specials	4-year CAGR: Decline / Growth / No change

Family packs have come full circle

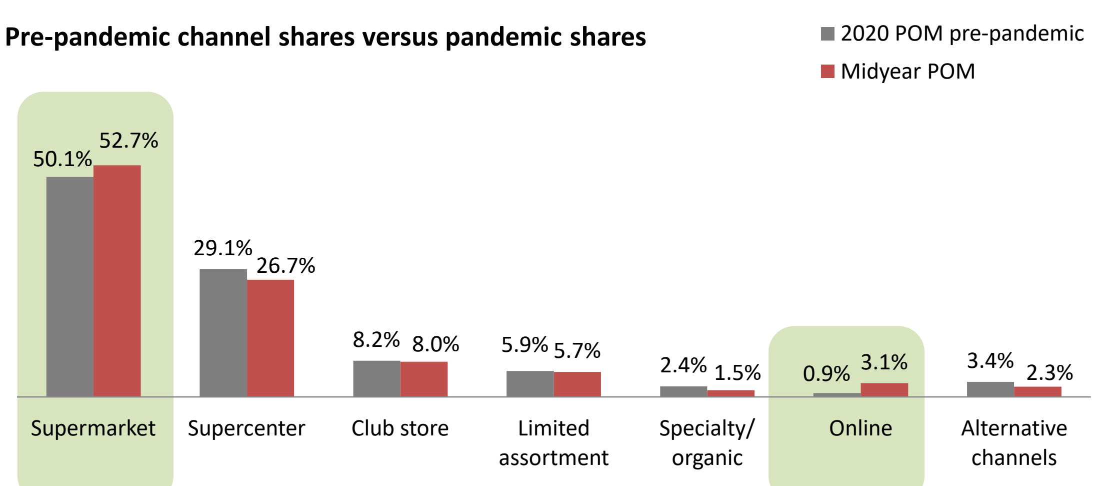
1) Value measure 2) growing Millennial HHs 3) the comeback of frozen

Pictures: 210 Analytics

Meat channel choices

Supermarkets strengthen their position

Online grows as well, limited assortment is stable and the others lost share



Some believe channel switching is temporary

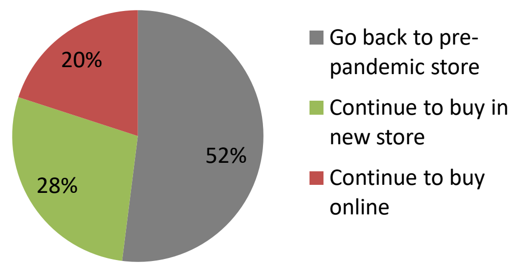
But 48% believe they will stick with their new choice

14%

Have purchased meat and poultry in a different store amid the pandemic vs. before;

- 12% to a different store/channel
- 2% online

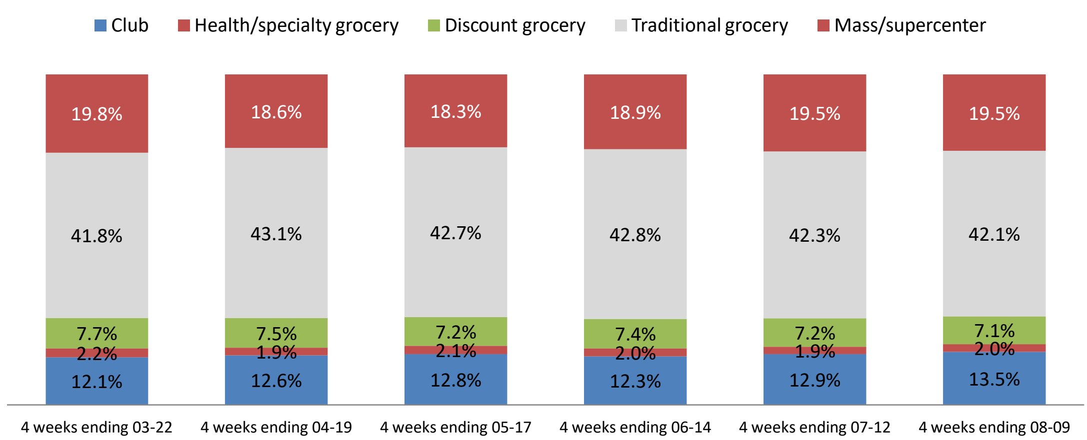
Once COVID-19 is less of a concern, do you think you will …



Club and grocery increased their share of dollars

Specialty, discount grocery and mass experienced declines amid pandemic

Share of total fresh meat dollars during the pandemic

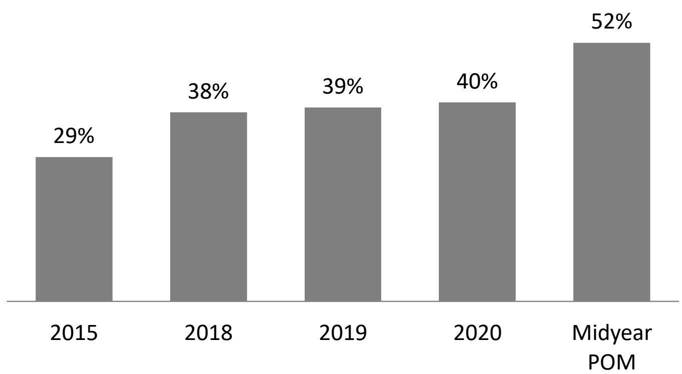


Source: IRI, Household Panel data, 4-week interval share of total fixed and random weight meat sales

Online grocery shopping leaped forward

About five years on the old growth trajectory

Have purchased groceries online



- **38%** have bought refrigerated meat online since March
- **73%** of pandemic online baskets contain meat

The online shopper changed, and meat with it

From convenience to safety

Consider the changes

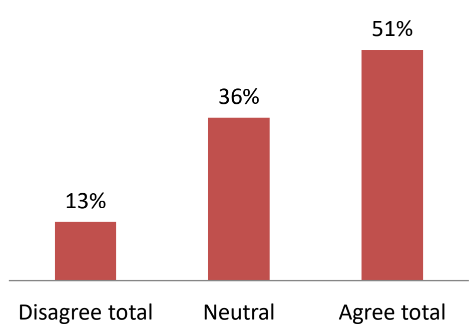
- More older shoppers who are avoiding the store
- Participation among all income levels
- Online moved beyond the coasts
- And beyond the urban areas
- Which means more focus on conventional

Meat industry perceptions

Lots of media coverage on the supply

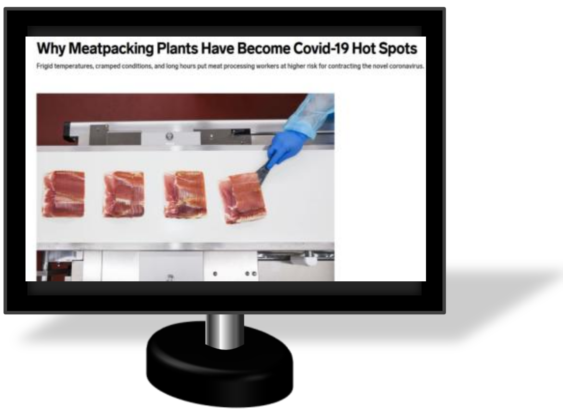
Majority feel industry did a good job keeping supply flowing

The meat industry did a good job keeping supply flowing during the pandemic

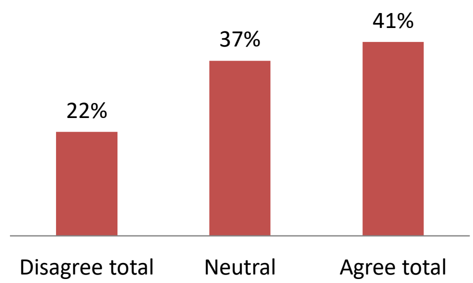


Lots of media coverage on COVID-19 cases

Consumer sentiment less positive, particularly among flexitarians



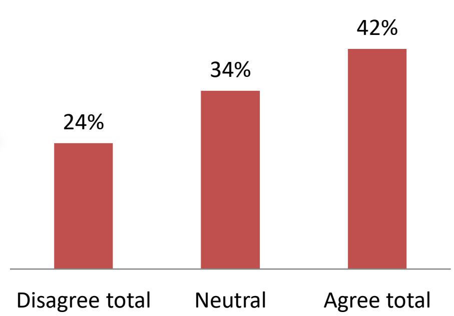
The meat industry took appropriate steps to protect plant employees during the pandemic



Also some doubt about safety vs. pre-COVID

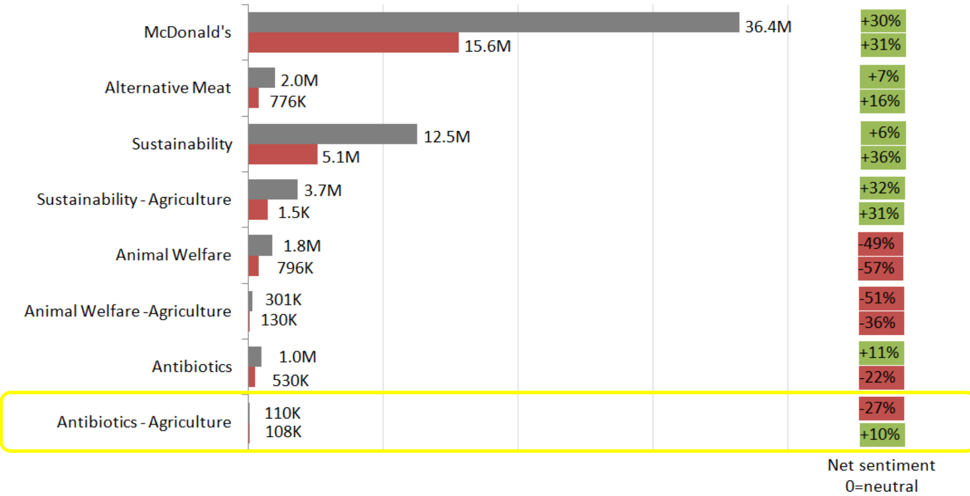
Responses reflected gratitude as well as doubt

The safety of meat/poultry did not change because of the pandemic



Relevant social media mentions are down

Some net scores improved, some backslid



Source: Elanco Pulse Institute, 2019 calendar year versus January 1-June 30, 2020

The animal welfare consumer

The importance of supply chain transparency on animal care is rising

High income, high weekly spending & trips

Millennials (families w/kids)

Specialty/organic store shoppers

Value transparency by brands and retailers

Integrate plant-based (blended + alternatives)

Elevated focus on health, environment and social responsibility

Flexitarians; wanting to eat less meat/poultry

Transparency remains important

But distinct drop in the need for communications amid pandemic

Importance of providing information on how/where livestock was raised and processed

Pre-pandemic

68%

Important for retailers

55%

Important for meat/poultry brands

During pandemic

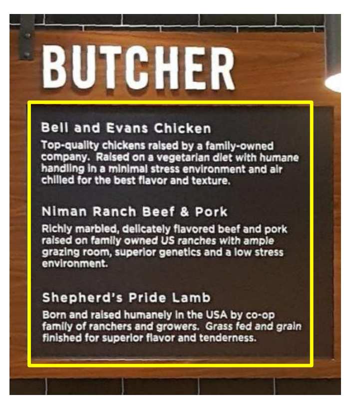
47%

Important for grocery stores and meat/poultry brands;

62% of flexitarians

US: increased focus at retail

From websites to signage and on-pack references



Pictures: Nolan Ryan | 210 Analytics

England: on-pack and in-store strategies

1) “Know and trust” and 2) Emphasis on “outdoor bred”

Pictures: 210 Analytics

Standards and transparency/traceability

“Best Retailer in Europe” — Animal welfare is now a competitive edge

Pictures: 210 Analytics

Meat alternatives stress environmental superiority

Several European retailers embrace the consumer mindset with vegan events

Veganuary:
For you
The animals
The planet

Pictures: 210 Analytics

The environmentally-conscious consumer

Of rising importance *and* impacting purchases; 17% of sales but 52% of growth

Living in metropolitan and coastal areas

Gen Z and Younger Millennials

High interest in production attributes

Flexitarians

Value transparency by brands and retailers

Integrate plant-based (blended + alternatives)

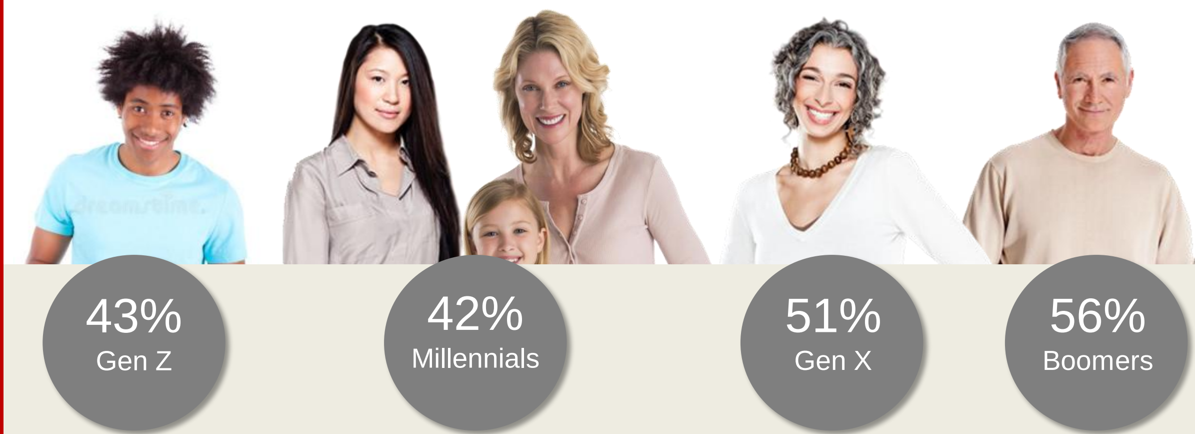
Elevated focus on health, animal welfare and social responsibility

Annual Meat Conference | The Power of Meat© 2020 |
IRI: Sustainably-positioned items in center store generate 17% of $ sales, 52% of growth

Views on meat and the environment unchanged

Overall, 49% believe there does not need to be a negative impact

If done properly, animal ag does not have a negative impact on the environment



Boomers twice as likely to be unsure

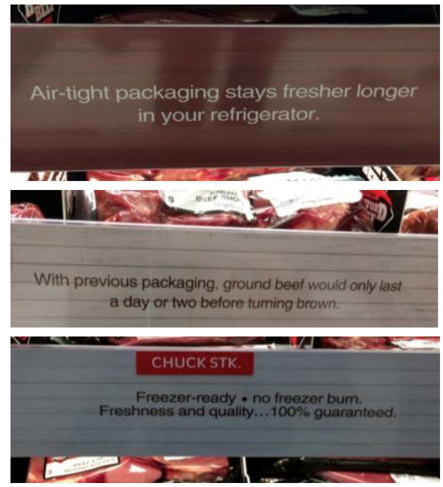
Gen Z has a highest share of big negative impact views

Animal agriculture and its impact on the environment

	POM 2020	Midyear POM	Gen Z	Millennials	Gen X	Boomers
If done properly, no negative impact	49%	48%	43%	42%	**51%**	**56%**
Some negative impact	24%	25%	26%	26%	24%	24%
A lot of negative impact	10%	13%	**23%**	**21%**	11%	3%
Don’t know	18%	15%	8%	11%	14%	17%

Opportunity to address related waste concerns

Package waste and food waste, both rapidly rising as societal issues as well



“Less plastic packaging” “Keep fresh packaging”

Pictures: 210 Analytics

In summary…

- We connected with more buyers, more times, across more brands, cuts and kinds and in different channels
  - How do we keep this momentum going?
- Engagement boosted meat IQ
  - How can we continue to grow knowledge and confidence?
  - While addressing the growing want for solutions on the one hand and economic pressure on the other
- Health, animal welfare, planet and social responsibility remain important amid pandemic
  - How do we amplify our voice and stress our side of the story?

Access your copy of the report/deck

- Top 10 handout
- Full, in-depth report
- For questions or additional information
  - aroerink@210analytics.com
  - 210.485.4552
  - Find me on LinkedIn

thank you!