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Sealed Air Re-imagine™

The Power of Meat 2016

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

Presented by:
Anne-Marie Roerink

210analytics

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THE POWER OF **MEAT** 2016

Spending more, less and differently

60%
Made changes

- ↑ 15% Premium cuts, convenience, product attributes
- ↔ 60% Switching between cuts, species, stores & brands
- ↓ 25% Smaller quantities, trading down, promotions, volume-based discounts

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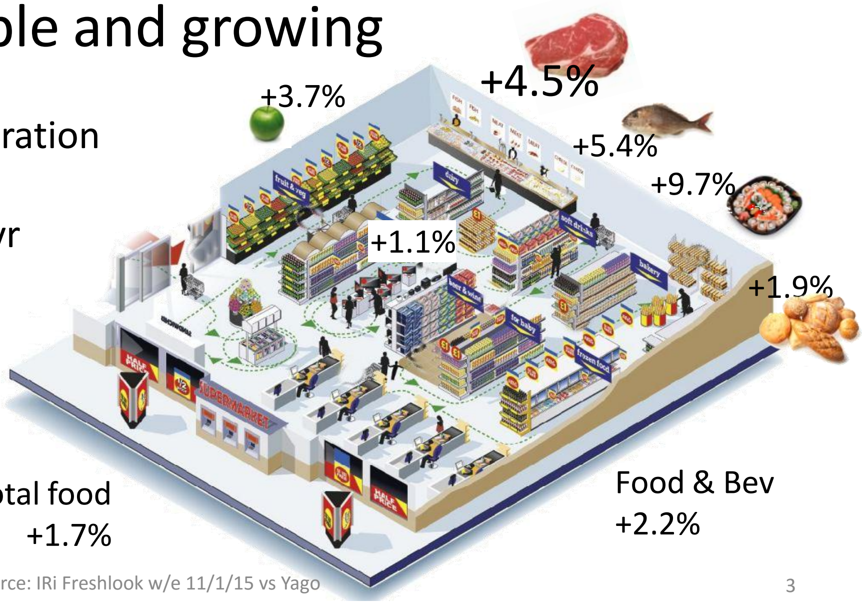
Big, profitable and growing

- 97% HH penetration
- $50B
- $300 per HH/yr



The Power of Meat© 2016 Source: IRi Freshlook w/e 11/1/15 vs Yago 3

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Dollar growth across segments

Conventional

+3.8%

Value-added

+6.4%

Natural

+23.5%

Organic

+31.5%

+4.5%

The Power of Meat© 2016 Source: IRi Freshlook w/e 11/1/15 vs Yago 4

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But volume growth much more subdued

Conventional

-0.1%

Value-added

-0.2%

Natural

+20.8%

Organic

+29.3%

+0.7%

 Source: IRi Freshlook w/e 11/1/15 vs Yago

THE POWER OF **MEAT** 2016

The Power of Meat 2016

- Consumer survey among 1,400 shoppers
  - 11 years and running
  - Updates on long-standing trend lines
  - New topics
- Real-life overlay
  - IRi nielsen Sealed Air Re-imagine
- Expert videos

THE POWER OF **MEAT** 2016

Agenda

- MEGA TRENDS
- PRE-TRIP PLANNING
- CHANNEL CHOICE
- PURCHASE DECISION
- CONSUMPTION & PREPARATION
- IMPROVING THE MEAT DPT

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Health and wellness
Transparency and traceability
Provenance
Natural/organic

MEGA TRENDS —
INFLUENCING THE MEAT PURCHASE

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Mega trend:
Health & wellness

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Meat and poultry belong in a balanced diet

78% Agree a balanced diet is essential to good health

82% Agree meat and poultry are important to a balanced diet as sources of protein and other nutrients

Lower agreement among Millennials

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The nation’s protein craze continues

- Annual sales of products containing labels calling out protein presence: $15.3 billion
  - Dollar growth: +7% Yago
  - 4-CAGR: 9%
- Are we doing enough to stake our claim?

Source: Nielsen, Total U.S. Food, 2012-2015

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Many sources with great consumer info

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Mega trend:
Transparency, traceability and provenance

The proliferation of claims & product attributes

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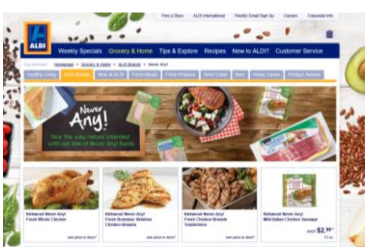
Growing awareness often leads to greater interest



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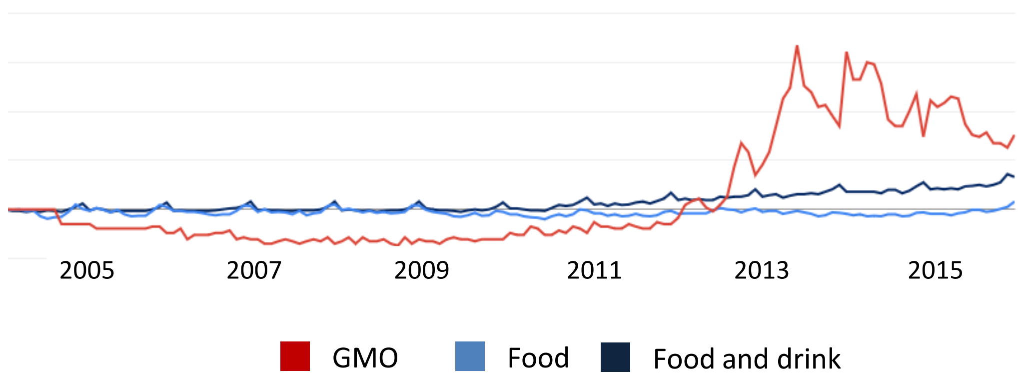
It gets consumers talking, and sometimes buying



 Source: Nielsen

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Label claim growth in the past 5 years

	$ CAGR	Unit CAGR
Organic	30%	23%
Hormone/antibiotic presence	29%	25%
Natural	27%	22%
Vitamin/mineral presence	15%	8%
Preservative presence	13%	9%
Saturated fat presence	12%	5%

 Source: Nielsen, Total U.S. Food, 2011-2015

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Interest versus the price trade off

Choice:
Equal freshness
No price difference

			
	Conventional	**Antibiotic-free**	**Organic**
All	**45%**	**30%**	**25%**
Currently buy natural/organic	19%	34%	47%

THE POWER OF **MEAT** 2016

Interest versus the price trade off

Choice:
Equal freshness
Price difference

			
	$2.99/lbs	**$4.99/lbs**	**$5.99/lbs**
All	**71%**	**20%**	**9%**
Buy nat./organic?			
Yes	51%	30%	18%
No	89%	11%	0%

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Transparency & traceability — “a right to know”

Even if shoppers don’t vote with their wallets

Importance of Transparency Traceability	The use of hormones	The use of antibiotics	Whether GMO ingredients are present	Traceability to the animal
Very important	44%	42%	35%	41%
Somewhat + very important	70%	68%	58%	68%

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An example of public debate: Netherlands

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Sub trend:
Provenance

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Provenance includes many different strategies

Local

USA

Imported

Pictures/labels courtesy of Yerecic Label and MLA

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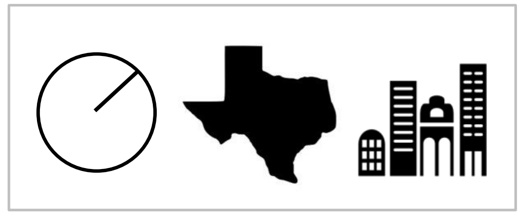
In meat, USA > local



63% — % Very interested — 41%

Ultimate question: does interest affect purchasing decision?

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Price versus USA

Choice: domestic vs. imported	Price> Country of origin	Willing to pay a little more for U.S.	Willing to pay significantly more for U.S.
All	**42%**	**54%**	**4%**
Millennials	48%	48%	4%
Boomers	33%	63%	4%
Low income	44%	53%	3%
High income	33%	60%	7%

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So many claims or "data points"

Organic Free Range Natural "No added" All vegetarian fed

Raised humanely Source verified Free range Sustainable Brands

But it is the story that sticks

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Country: Coles, Australia

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Pictures courtesy of NH Foods Australian Beef

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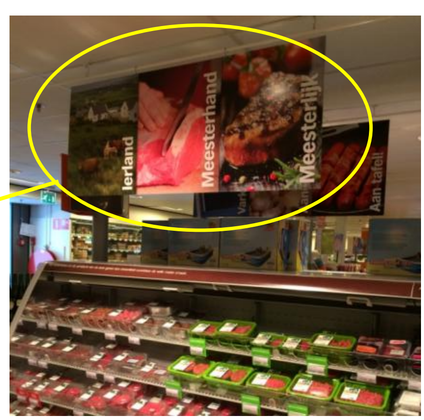
Import — Albert Heijn, The Netherlands



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Import — Hanos, the Netherlands

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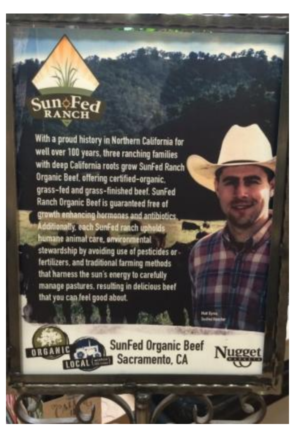
Local — Nugget Markets, CA



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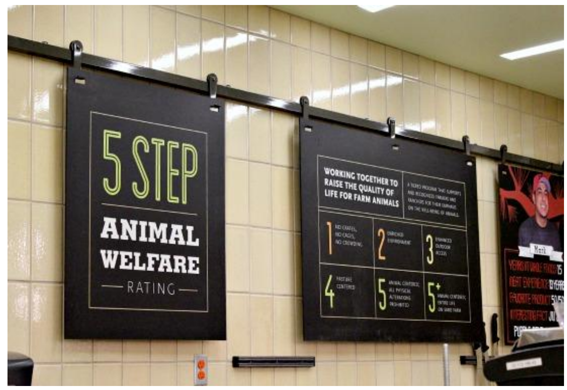
And provenance allows for many more stories

Award-winning

Animal welfare



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Mega trend:
Natural and organic

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Considerable uptick in availability

<u>% of total packages</u>

2004: 22%

2015: 38%

2004: 0.2%

2015: 3.8%

But prices for organic rising fast:
Organic: +9.6% vs. Conventional: +5.2%

 Source: Sealed Air | National Meat Case Study 2015 & Nielsen

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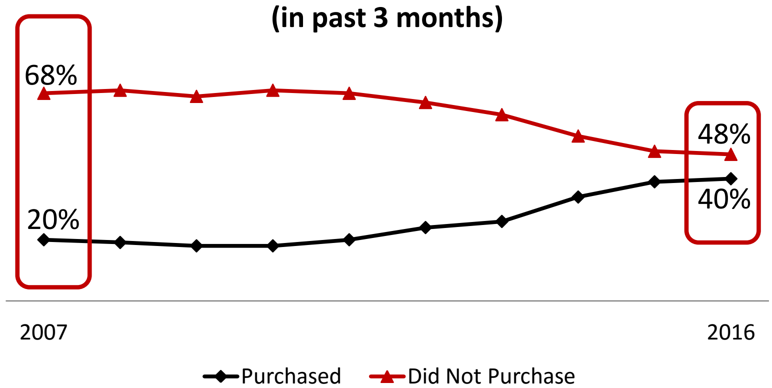
Continued growth for natural/organic meat & poultry

Purchased natural and/or organic meat/poultry? (in past 3 months)



Intent upcoming year

28% plan to spend more

66% about the same

6% less

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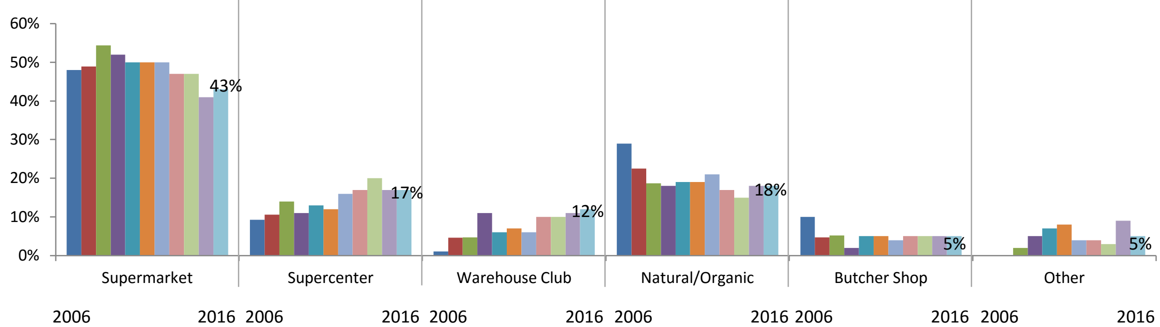
Supermarkets	Supercenters	Clubs	Specialty/Organic	Butcher shops	Other
After initial growth, lower but steady share	Slow growth to +17% plateau	Sustained growth	Long-term down; but rebuilding	Plateau around 5%	Strong growth for farmers' markets, Farm direct and online as sources for natural and organic meat/ poultry



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"Free from" top reason for natural/organic

2009

1. Positive long-term personal health effect
2. Better nutritional value
3. Freshness
4. Better health/treatment of the animals
5. Better taste

2016

1. "Free from"
2. Better health/treatment of the animals
3. Positive long-term personal health effect
4. Freshness
5. Better taste

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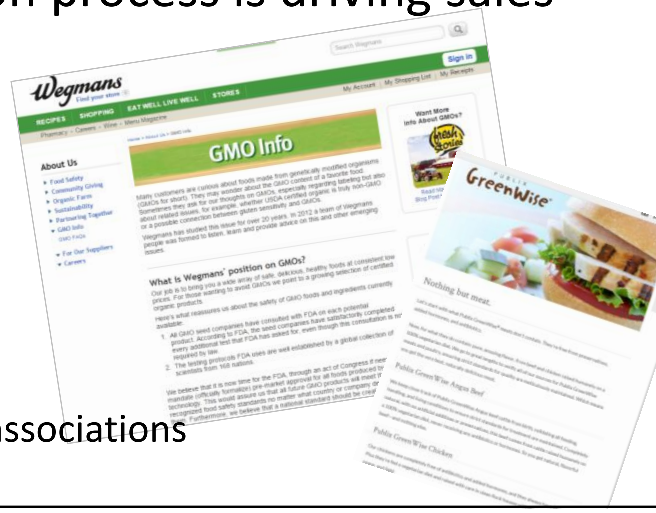
Growing desire to have transparency into the product and production process is driving sales

- Listen and engage
  - Be proactive
  - Be interactive
  - Educate
  - Informed choice
  - Explain your position
  - Work with your trade associations



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Determination pre-trip or in-store
Promotional research
Circular trends

PRE-TRIP PLANNING—
WELL-RESEARCHED LIST ITEMS

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Majority decides on meat/poultry items at home

	At home	In the store	Behavior varies
	47%	36%	17%
Millennials	41%	33%	26%
Boomers	52%	39%	9%

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Meat/poultry promotions remain important

78%

Check meat/poultry promotions at primary protein store:

39% Every time
39% Sometimes
11% Hardly ever
11% Never

59%

Check meat/poultry promotions across stores:

18% Every time
42% Sometimes
22% Hardly ever
19% Never

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Paper circular still on top; but big gains in digital

	2016	Change vs. 2015	Millennials	Boomers
Paper circular at home	63%	↓	43%	76%
Paper circular at the store	51%	=	49%	54%
In-store only promotions	39%	↑	47%	37%
Electronic circular	26%	↑	31%	23%
Special digital meat promotions	24%	↑	30%	22%
Smartphone in-store	16%	N/A	25%	9%
Store app	14%	=	24%	5%

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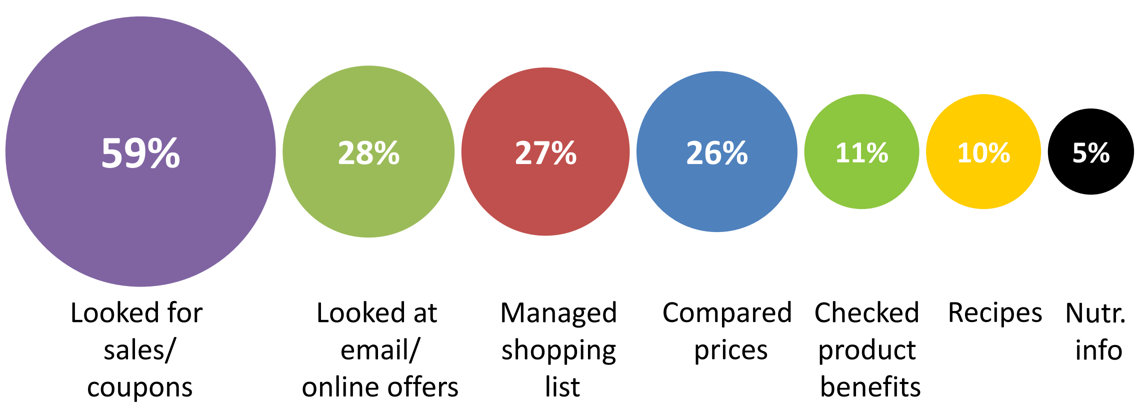
Seeking value is the top pre-store digital activity



For comparative purposes, as some respondents selected more than one activity

Source: The Nielsen Category Shopping Fundamentals study - Quantitative study, capturing 45,000+ purchases among 18,000+ respondents

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Cents-off top preference

	Ranked 1st among	Avg rank 1-4, 1=highest
1. Cents-off per pound	46%	1.86
2. Meat/poultry BOGOs	29%	2.11
3. Bulk	18%	2.99
4. Meal BOGOs	7%	3.02

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Promotions help to solidify sales among primary shoppers and attract secondary shoppers

- Emerging communication vehicles
- Shifting ad budgets
- Relevant, targeted promotions
  - Carefully considering species, cuts, attributes, convenience vs. unprepared, prices and/or total meal solutions

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Primary channel
Channel switching
Occasional purchase
Alternative channels

THE CHANNEL CHOICE—
TRADITIONAL POWERHOUSES & ALTERNATIVE CHOICES

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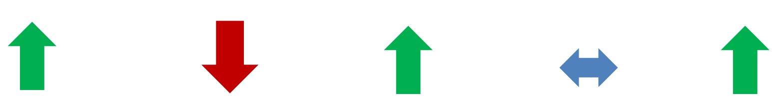
Meat/poultry are a supermarket stronghold

	Supermarkets	Supercenters	Club stores	Organic stores	Other
 Primary store groceries	60%	29%	6%	3%	2%
 Primary store meat and poultry	62%	19%	10%	3%	6%

Gain/loss meat share 2016 vs. 2015



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Supermarkets main beneficiary of channel switching

If switch, where to?
48% Supermarkets
18% Club stores
13% Butcher/carnicerias
7% Supercenters
4% Farmers' market
4% Organic stores
2% Online
4% Other

Dual store strategy

27%

Primary channel for groceries is different than primary channel for meat/poultry

Attrition by channel

14%
Supermarket patrons buy meat/poultry elsewhere

47%
Supercenter patrons buy meat/poultry elsewhere

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Supermarkets improved

Supermarket shoppers buying meat at their primary store (conversion %)

More likely to occasionally purchase meat at farmers' markets and online

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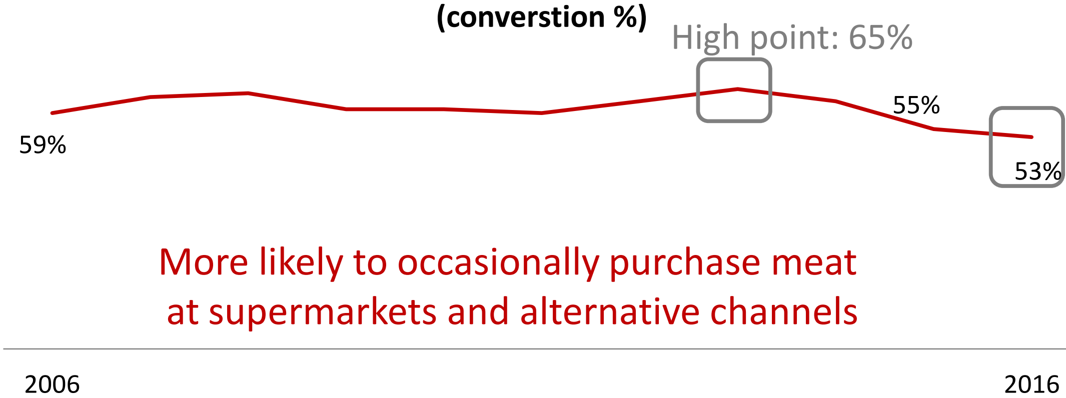
Supercenter patrons' meat purchase scatters

Supercenter shoppers buying meat at their primary store (converstion %)



More likely to occasionally purchase meat at supermarkets and alternative channels

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Occasional purchase: growth in alternative outlets

	Farmers' markets	Dollar stores	Farm direct	Online
2016	18%	7%	5%	4%
2015	15%	3%	3%	3%

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Optimizing conversion among Millennials key to traditional channels

- Channel shifting significant
- Millennial baskets becoming more important to industry success
  - More spontaneous buyers
  - If no differentiated offer, price rules purchase
  - Overindex for alternative formats

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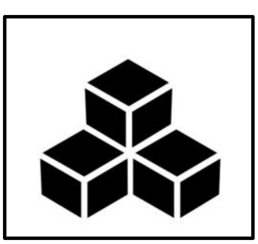

Purchasing decision tree
Meat case versus full-service counter
Packaging innovation

PURCHASING DECISION—
HIERARCHY CHANGING

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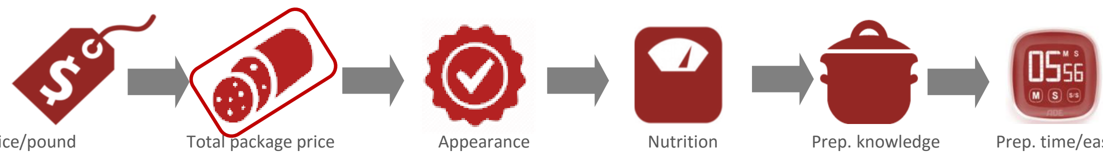
Renewed dominance of price



	Price/pound	Total package price	Appearance	Nutrition	Prep. knowledge	Prep. time/ease
	4.4 ↔	4.2 ↑	4.0 ↓	3.0 ↓	2.8 ↔	2.7 ↔
Millennials	4.0	4.1	3.9	2.9	2.9	3.1
Boomers	4.7	4.3	4.1	3.0	2.7	2.5

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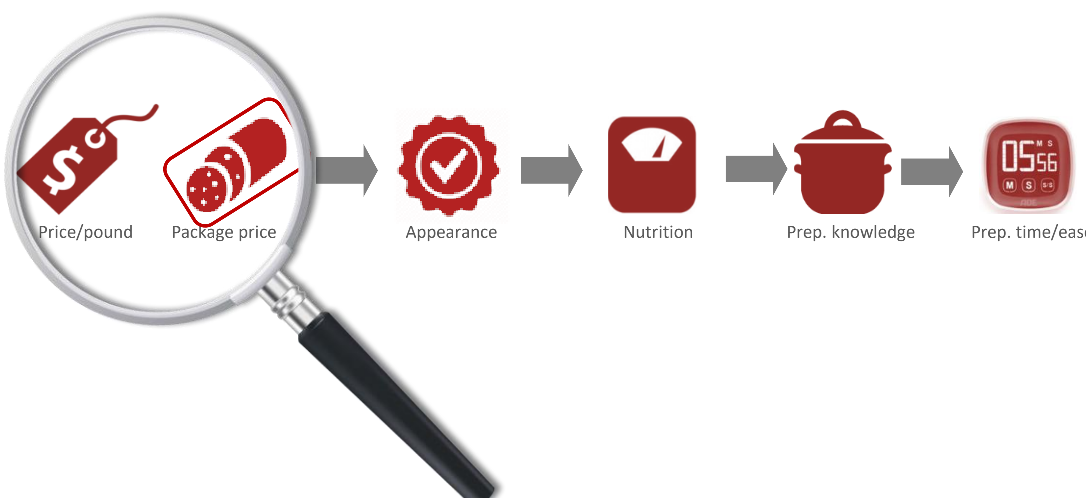

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Price per pound has universal, long-standing appeal, but interest in total package price rising

4.4

Price per pound
6-item ranking scale

Importance rises along with…

- Age (Millennials: 4.0 | Seniors: 4.8)
- HH size (Singles: 4.3 | 4+ people: 4.5)

4.2

Total package price

Dominant factor for Millennials & singles

- Impacting package size variety, fixed weight packages and price ceilings

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Rapid rise in exact weight packages

Turkey	Ground beef	Pork	Chicken	Lamb & Veal	Beef
2004: 31%	2004: 31%	2004: 6%	2004: 13%	2004: --	2004: 4%
2015: 68%	2015: 68%	2015: 25%	2015: 15%	2015: 14%	2015: 9%

2004: 13%
2015: 31%

Source: National Meat Case Study 2015 | Beef: 9% and Veal: 19%

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Emphasis on price drives in-store importance

36% of shoppers decide on items in-store

Regardless of deciding at home or in-store:

90% compare different cuts/kinds
- Every time: 37%
- Frequently: 27%
- Sometimes: 26%

Once decided on a cut/kind:

91% compare different packages
- Every time: 36%
- Frequently: 31%
- Sometimes: 24%

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Retailers are moving towards branded programs

% of packages in the meat case in 2015

	Supplier brand	Private brand	No brand
2002	45%	22%	33%
2015	46%	51%	4%

 Source: Sealed Air | National Meat Case Study 2015

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Rising preference for brands

	Fresh	Processed
		
▪ Prefer supplier/nat. brand	25% ↑	40% ↑
▪ Prefer private label	21% ↑	18% ↑
▪ No outright preference	54% ↓	42% ↓

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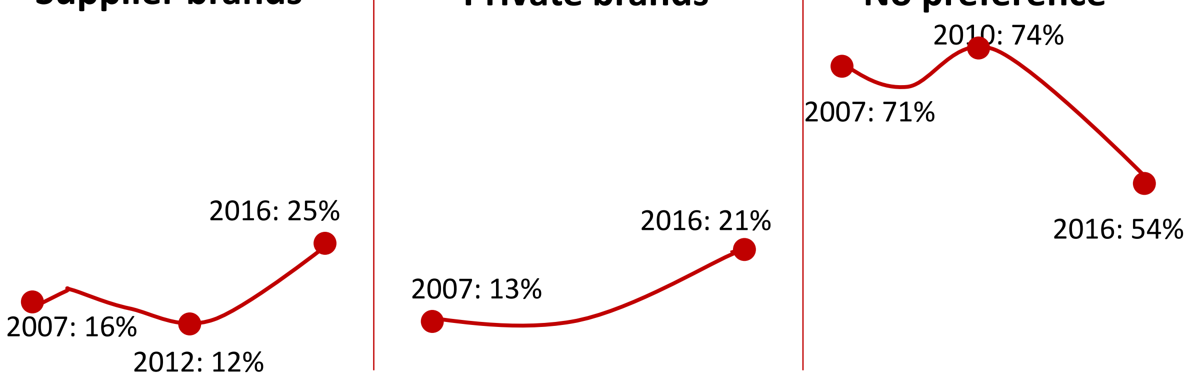
Long-term rise of brands — fresh

Supplier brands | **Private brands** | **No preference**



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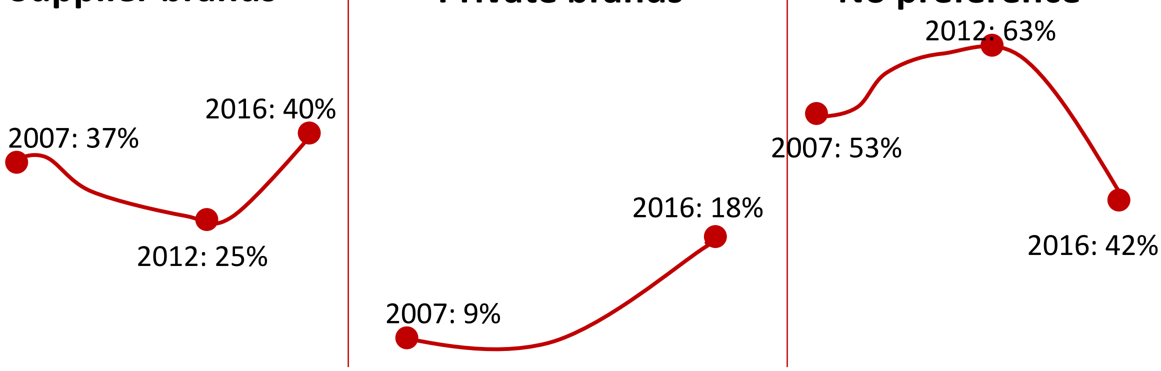
Long-term rise of brands — processed

Supplier brands | **Private brands** | **No preference**



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Appearance: discerning freshness

1. Use/sell by date: 58%
2. Color: 57%
3. Time allowed in case: 45%
4. Time between farm/store: 38%

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Discerning freshness continued

5. Never frozen: 37%
6. No preservatives: 37%
7. Minimally processed: 31%
8. Cut to order: 18%
9. Age of the animal: 16%

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Who does fresh best?

33% Butcher	29% Supermarket	10% Farm-direct	9% Farmers' market



Millennials	28%	26%	15%	16%

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Who does safe best?

34% Supermarket	25% Butcher	13% Organic store	12% Supercenter	12% Farm/Farmers' market

Touting our supply chain!

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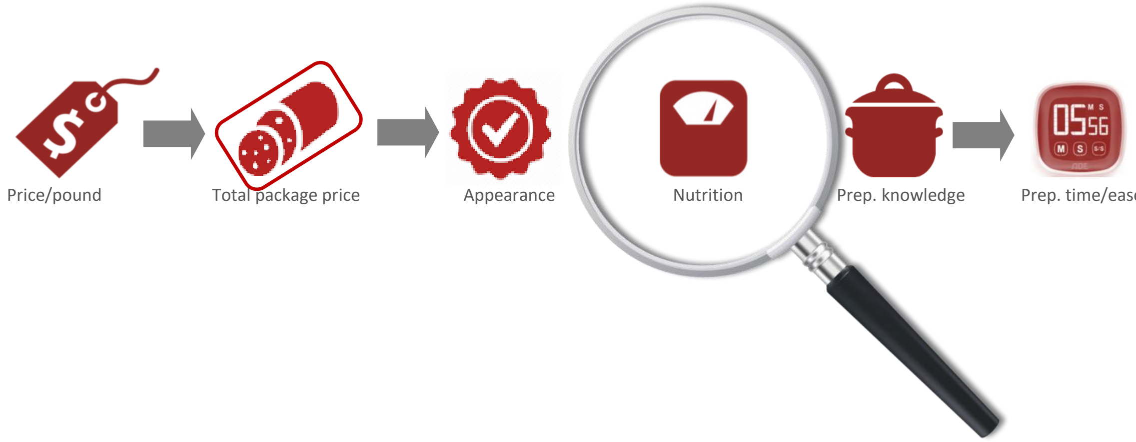

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Moderation, not elimination

	Regularly	Never
▪ Leaner cuts	50%	8%
▪ Limit second helpings	35%	21%
▪ Smaller portion sizes	31%	19%
▪ More fish & seafood	26%	20%
▪ More meatless meals/ meat alternatives	20%	31%

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Greater focus on sodium, calories and sugar

Sodium	**60%**	↑
Total fat	55%	=
Calories	47%	↑
Saturated fat	46%	=
Cholesterol	39%	=
Sugars	39%	↑
Trans fat	36%	↓
Protein	34%	=
MSG	25%	=
Non-GMO	24%	=
Total carbohydrates	23%	↓

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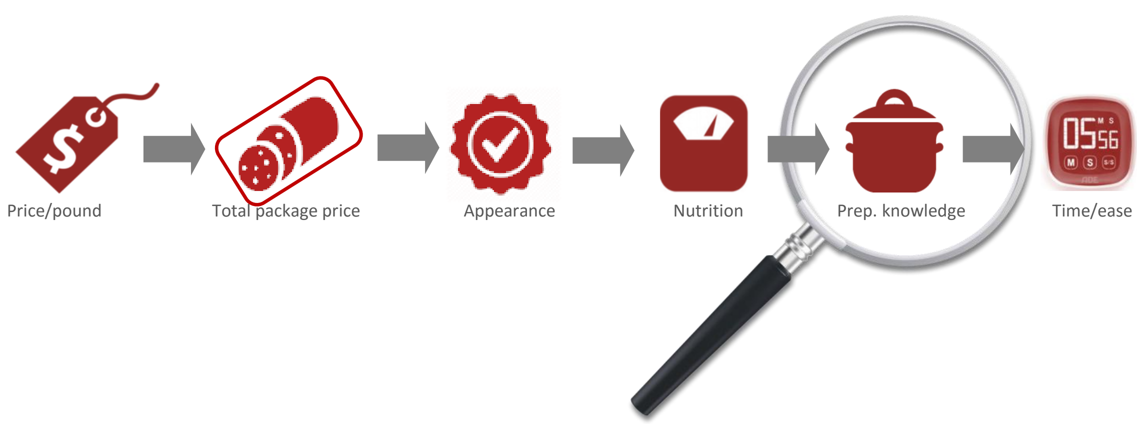

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Preparation knowledge marginal at best

> 50% “manage but no expert” or “need help”

- Cooking fresh product
- Marinating, seasoning
- Discerning quality and freshness
- Nutrition
- Wine pairing/meal creation

>70% of Millennials

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Don’t know? Digital research >> Mom

41%	25%	13%	7%	5%

Websites: 36%
Social media: 5%

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Interest in "how to"

	2013	2016
Would absolutely use	29%	49% ↑
Would maybe use	54%	42%
Would not use	17%	9% ↓

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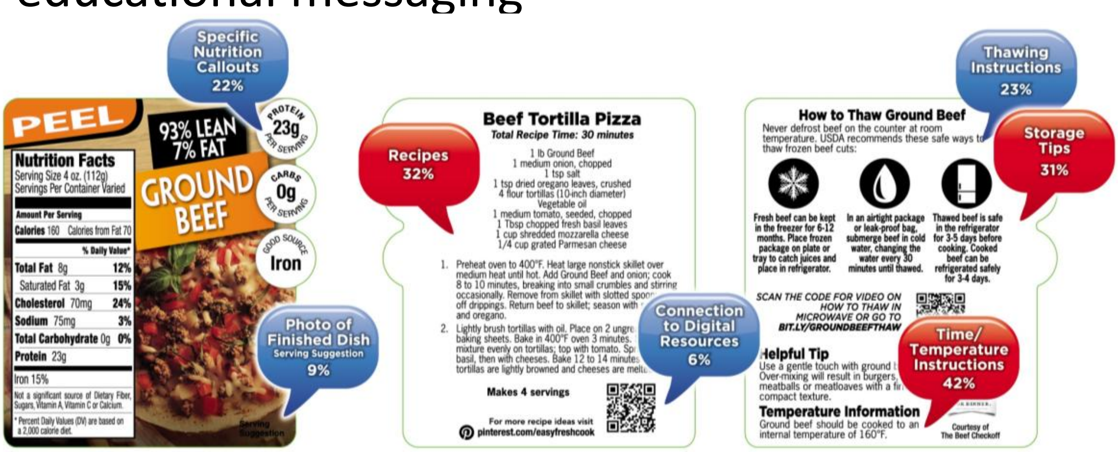
Cooking instructions & recipes top package educational messaging



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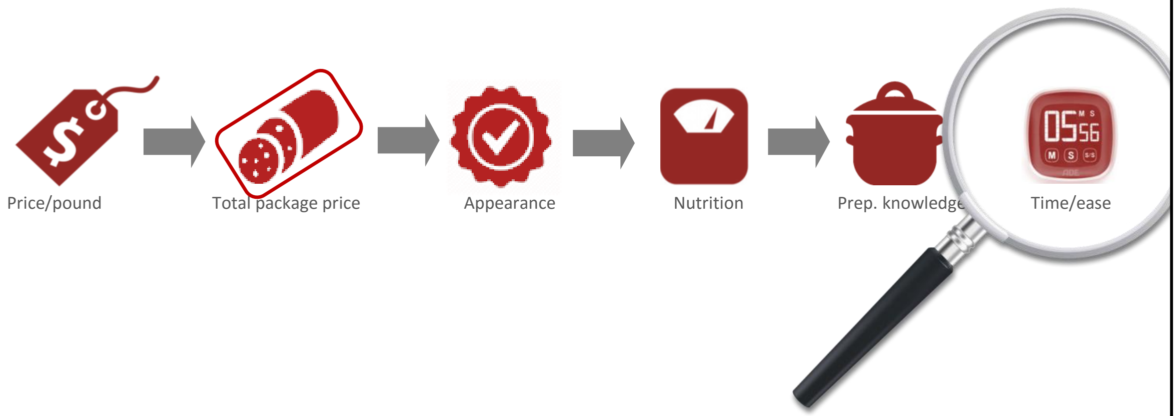

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Preparation knowledge/time will increasingly influence the meat department

	Prep. knowledge	Prep. time
	2.8	2.7
Millennials	2.9	3.1
65+	1.6	1.5

- Convenience meats
- Meat as ingredient versus center-of-plate
- Muscle cuts versus "quick" items
- Cooking instructions/recipes
- More help/advice

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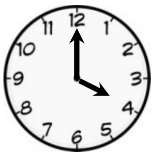
Dinner plans a moving target for many



Know what's for dinner
- 30% Occasionally
- 10% Hardly ever

40%

35%

51%

50%

30%

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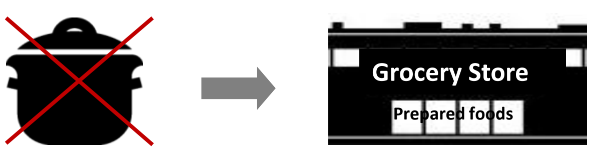
But when undecided, foodservice often wins out



2016

12% Very often
41% Sometimes
35% Rarely
12% Never

- Slight uptick in very often/sometimes
- Deli prepared +9.8%

Home-cooked meals containing meat/poultry
Meal trends
Heat-and-eat and ready-to-eat
Value-added meat

MEAT CONSUMPTION & PREPARATION

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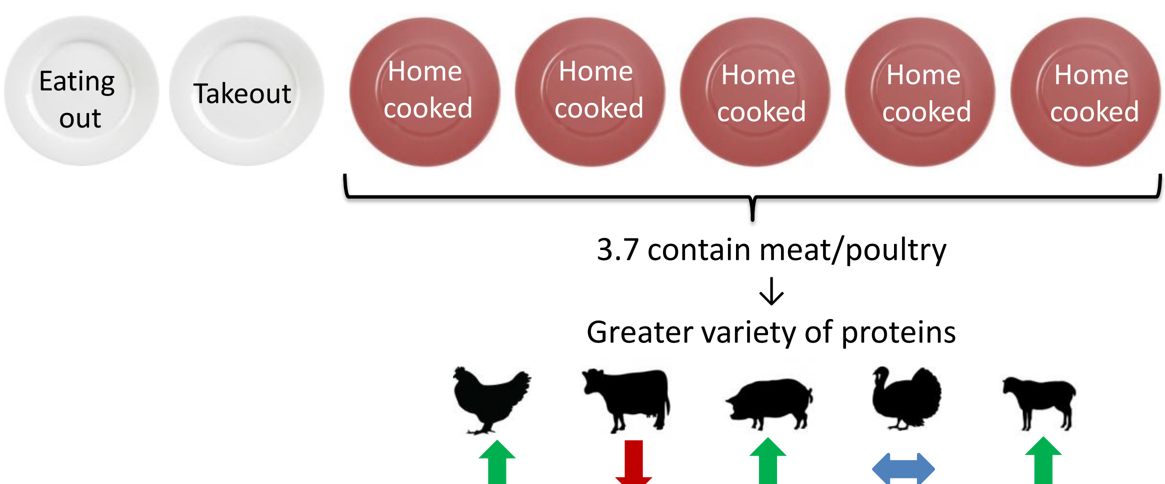
Home-cooked is in, but how about meat?



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Different proteins reflect gains and losses as well

	$	Lbs
	+5.1%	+3.0%
	+6.1%	-4.1%
	+2.9%	+7.3%
	+2.5%	-0.7%
	+8.0%	+3.7%

$ **+4.5%**
Lbs **+0.7%**

Source: VMMeat FreshLook

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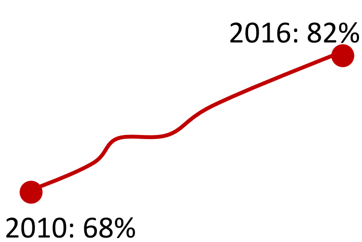
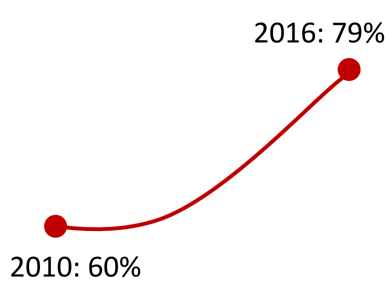
Shoppers take to convenience solutions

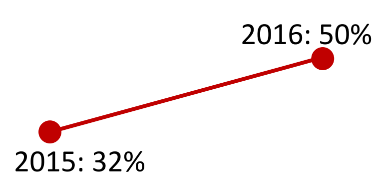
Ready-to-eat



Heat-and-eat



Value-added



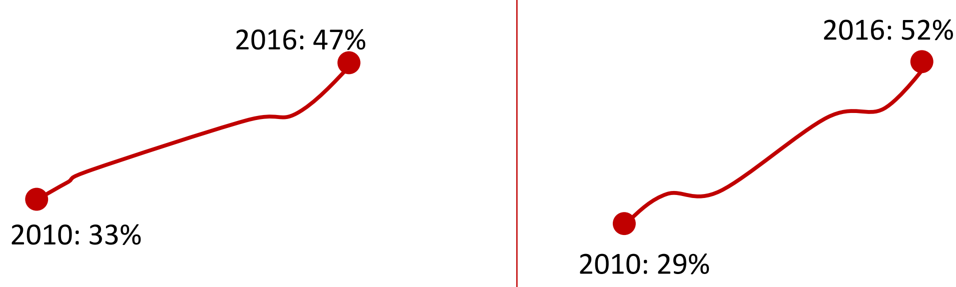
% buying 1+ time/year

82

THE POWER OF **MEAT** 2016

Combined with a rise in consumption frequency

Ready-to-eat | **Heat-and-eat**

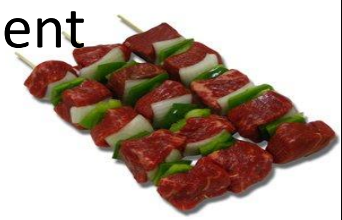


% consuming at least once a week

83

THE POWER OF **MEAT** 2016

Value-added is a promising segment



Buy?

28% Sometimes

9% For special occasions

8% Only in a time crunch

50% Hardly ever/never

THE POWER OF **MEAT** 2016

User profile for value-added signals need for careful consideration at the store-level

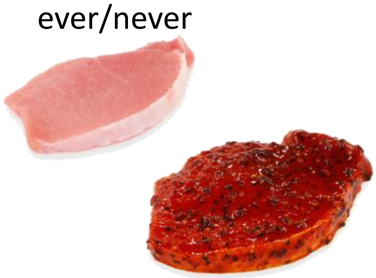
- While growing, continued skew:
  - Urban areas
  - Higher incomes of $100K+
  - College educated
  - Smaller household sizes from 1-3 people

THE POWER OF **MEAT** 2016

Cost primary barrier to faster growth

50%

Hardly ever/never



Why?

- **20%** Cost
- **17%** Prefer my own
- **5%** Don't think they are fresh
- **4%** Don't think the meat/poultry quality is good
- **4%** Don't like the thought of employee handling

THE POWER OF **MEAT** 2016

Being part of the solution

- Recapture fresh meat opportunity as centerpiece of home dinner occasions
- Develop quick/simple preparation opportunities for oven, stove top and slow cooker
- Win with Millennials

THE POWER OF **MEAT** 2016

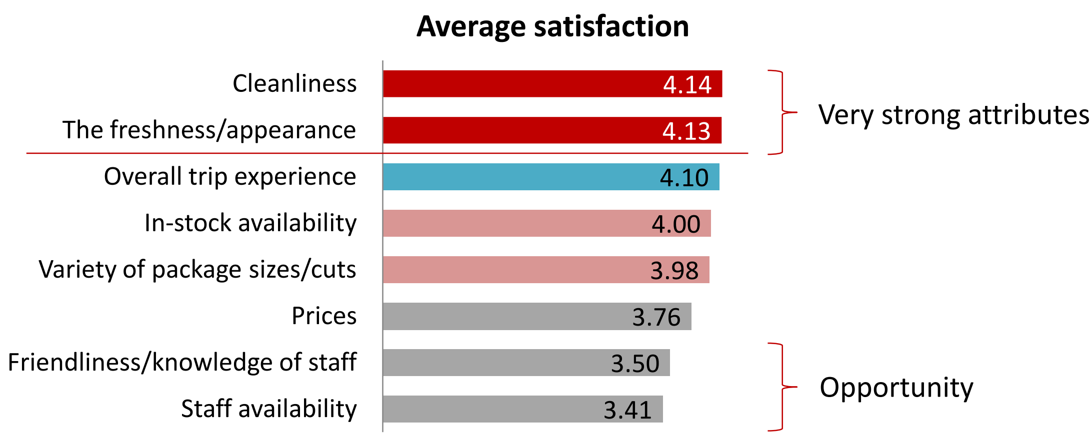
Department score card

Shopper suggestions on improvements

IMPROVING THE MEAT DEPARTMENT

THE POWER OF **MEAT** 2016

Meat department scores highest in cleanliness



THE POWER OF **MEAT** 2016

Satisfaction declines as day progresses

	18% Before 11 a.m.	39% 11 a.m.-3 p.m.	37% 3 p.m.-7 p.m.	7% After 7 p.m.
Overall trip experience	**4.17**	**4.06**	**4.04**	**3.86**
Freshness/appearance	4.26	4.11	3.98	3.72
Cleanliness	4.20	4.11	3.82	3.67
Variety of package sizes/cuts	4.13	3.95	3.89	3.62
In-stock	4.06	3.98	3.88	3.68
Prices	3.77	3.70	3.79	3.75
Associate friendliness/knowledge	3.67	3.84	3.50	3.35
Associate availability	3.60	3.40	3.35	3.18

THE POWER OF **MEAT** 2016

Spending and willingness to recommend drop accordingly…

	18% Before 11 a.m.	39% 11 a.m.-3 p.m.	37% 3 p.m.-7 p.m.	7% After 7 p.m.
Overall trip experience	**4.17**	**4.06**	**4.04**	**3.86**
Average basket	$25.44	$27.22	$26.60	$22.52
Willingness to recommend	4.12	4.05	3.92	3.85

THE POWER OF **MEAT** 2016

As the hours tick by…

- Variety
- In-stock position
- Cleanliness
- Service
- Appearance

- Trip satisfaction
- Trip spending
- Willingness to recommend

Immediate (basket) and long-term (loyalty) impact

THE POWER OF **MEAT** 2016

No greater detractor than lack of cleanliness

CLEANLINESS

	Overall trip experience	Willingness to recommend	Average basket
All	**4.10**	**4.04**	**$26.38**
	4.60	4.36	$27.23
	3.07	3.47	$24.38

THE POWER OF **MEAT** 2016

What do shoppers mean by cleanliness?

Clean aprons, in fact, clean **white** aprons

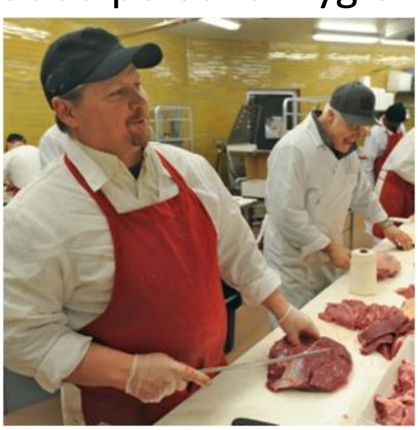
What do shoppers mean by cleanliness?

Hats, hair nets and some mention gloves

THE POWER OF **MEAT** 2016

What do shoppers mean by cleanliness?

Good personal hygiene and appearance

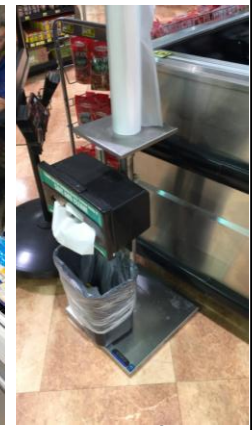


THE POWER OF **MEAT** 2016

What do shoppers mean by cleanliness?

Bags, hand cleaning stations and wipes





THE POWER OF **MEAT** 2016

What do shoppers mean by cleanliness?

Packages that are not leaking/bled through

>Half would rather buy

- Leak-proof
- Freezer-ready
- Resealable

THE POWER OF **MEAT** 2016

What do shoppers mean by cleanliness?

Being able to see the backroom

THE POWER OF **MEAT** 2016

What do shoppers mean by cleanliness?

Clean refrigeration equipment

Other comments

- Lack of “clutter”
- Good organization

THE POWER OF **MEAT** 2016

Out-of-stocks second-highest detractor of satisfaction

IN-STOCK AVAILABILITY

	Overall trip experience	Willingness to recommend	Average basket
All	**4.10**	**4.04**	**$26.38**
	4.73	4.40	$27.10
	3.35	3.61	$25.01

THE POWER OF **MEAT** 2016

Not finding all items can cost you dearly

Found all items		Did not find all items	
	48%		29%
	16%		41%

25-point swing in dissatisfactory trip

"Will soon be available again. Our associates will gladly make alternate recommendations."

THE POWER OF **MEAT** 2016

Item and package variety has greatest ability to drive satisfaction

VARIETY OF PACKAGE SIZES/CUTS

	Overall trip experience	Willingness to recommend	Average basket
All	**4.10**	**4.04**	**$26.38**
	4.80	4.43	$28.00
	3.31	3.59	$24.49

THE POWER OF **MEAT** 2016

What do shoppers mean by variety?

Package sizes

Species/cuts

Claims/attributes

THE POWER OF **MEAT** 2016

Employees are your best loyalty card

Service counter

Used		Did not use	
☺	59%	☺	41%
☹	13%	☹	20%

18-point swing in very satisfied

Received help/suggestions

Did		Did not	
☺	62%	☺	43%
☹	13%	☹	19%

19-point swing in very satisfied

105

THE POWER OF **MEAT** 2016

Leveraging the service counter advantage

76%

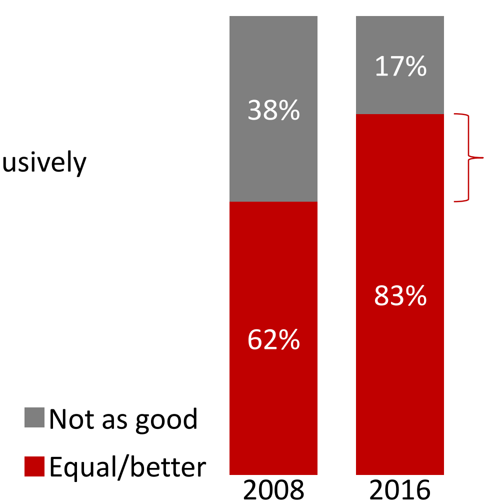
Have access to a full-service counter at primary meat/poultry store; 27% use counter exclusively

97%

Use meat case; average of 70% selected from case

83%

Believe case-ready is just as good or better



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THE POWER OF **MEAT** 2016

What do shoppers mean with good service?

Having available, friendly and knowledgeable staff

THE POWER OF **MEAT** 2016

What do shoppers mean with good service?

Introducing the managers/wearing name tags

THE POWER OF **MEAT** 2016

What do shoppers mean with good service?

Offer to break packages/provide custom cuts

THE POWER OF **MEAT** 2016

What do shoppers mean with good service?

Education on types of cuts, uses, and preparation

What do shoppers mean with good service?

Recipes, meal suggestions, meal stations

Satisfied shoppers higher spending & more loyal

Long-term relationship:

- Repeat purchasing
- Resist lower-priced competitors

In closing

- Food retailing starts and ends with the shopper
- The Power of Meat:
  - One size fits no one
  - Identify pockets of growth that match your organization
  - Create differentiated offerings
  - Tell the story

THE POWER OF **MEAT** 2016

Download your copy of the report

- Top 10 handout
- www.meatconference.com/2016POM

- For questions or additional information
  - aroerink@210analytics.com
  - 210.485.4552

thank you!