

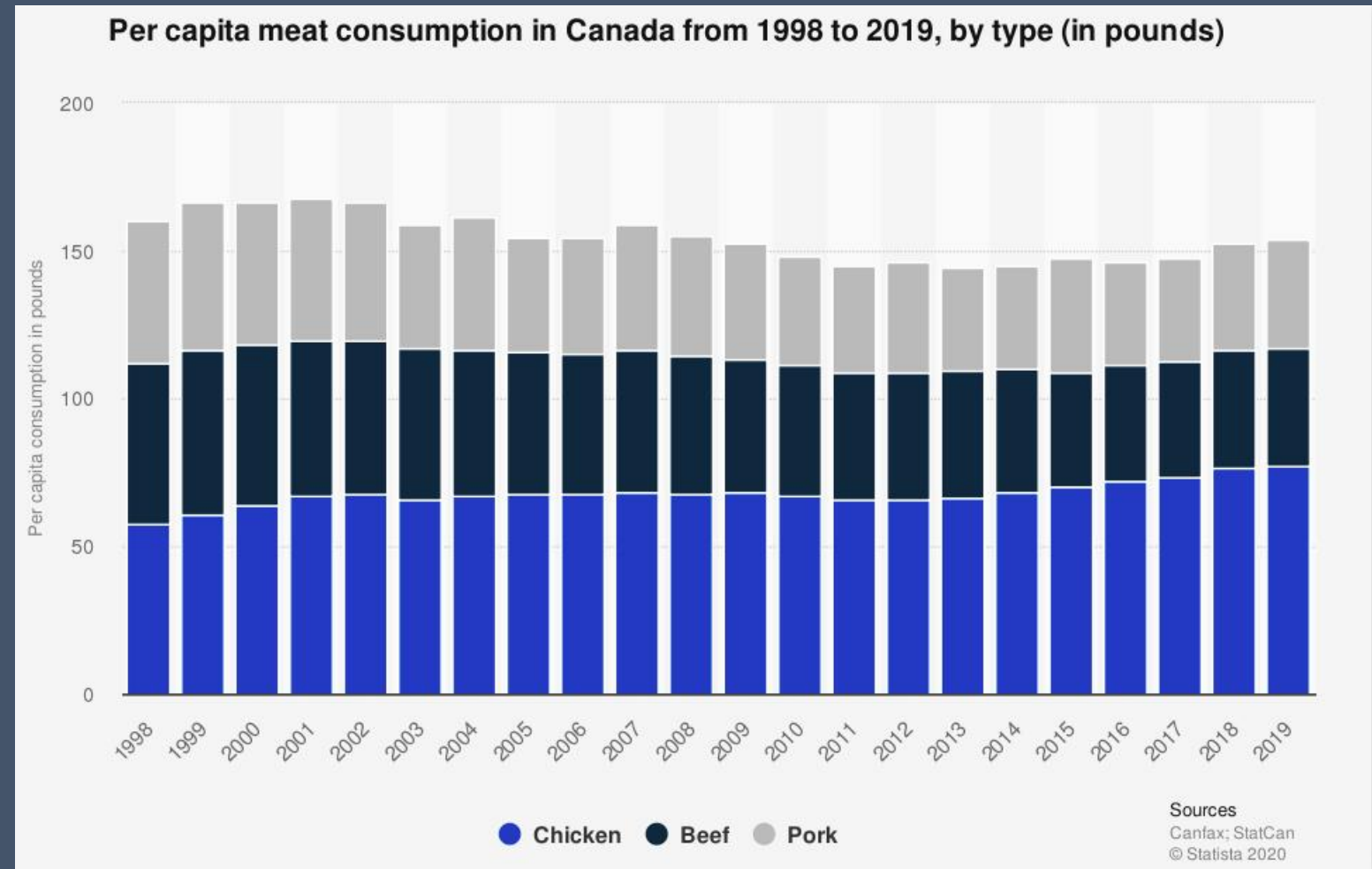
Assurance Beyond the Farm Gate

Consumers' expectations

Remember
when:
Before the
pandemic



Meat
consumption
declining,
shifting

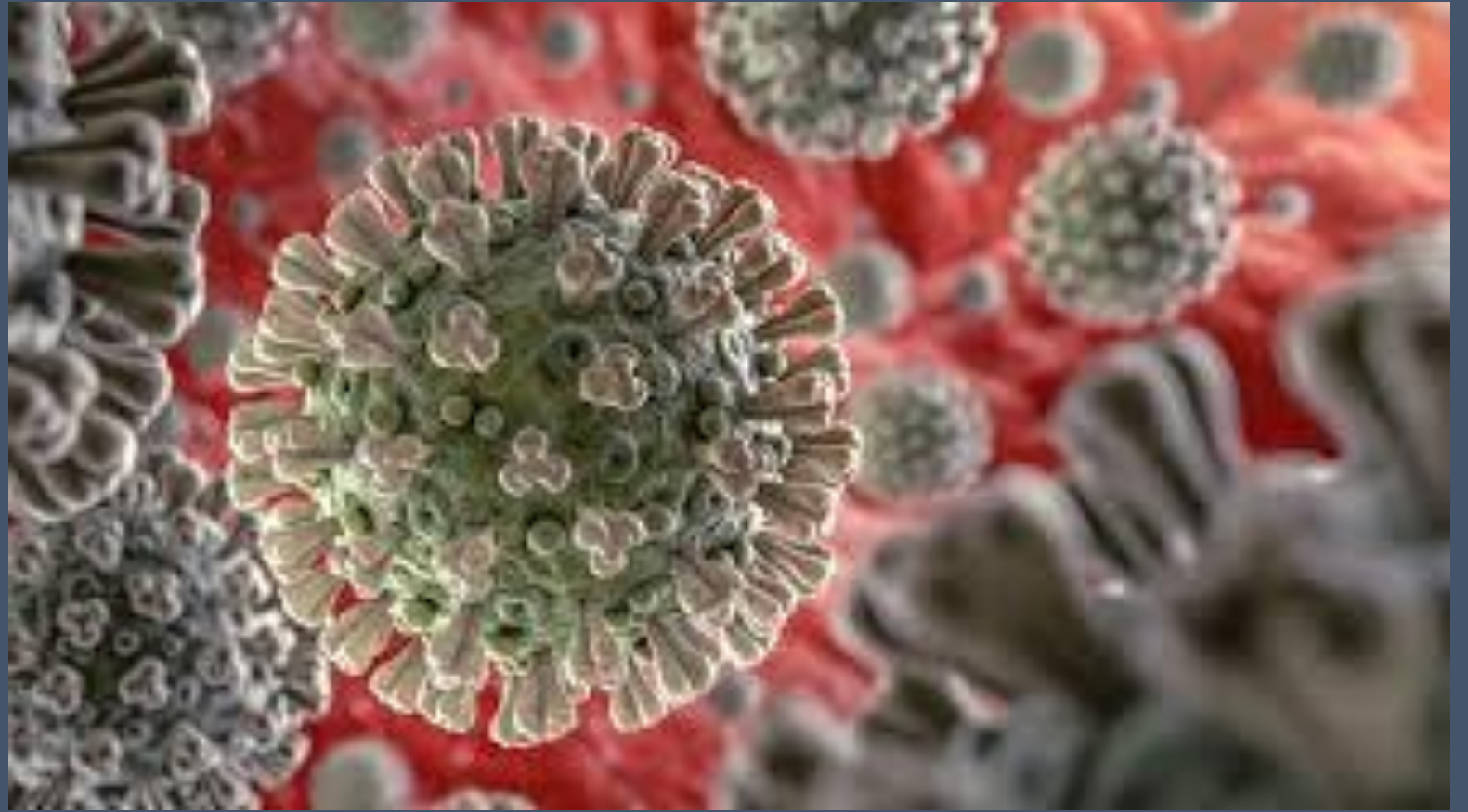






GLOBAL ROUNDTABLE FOR[®]
SUSTAINABLE BEEF

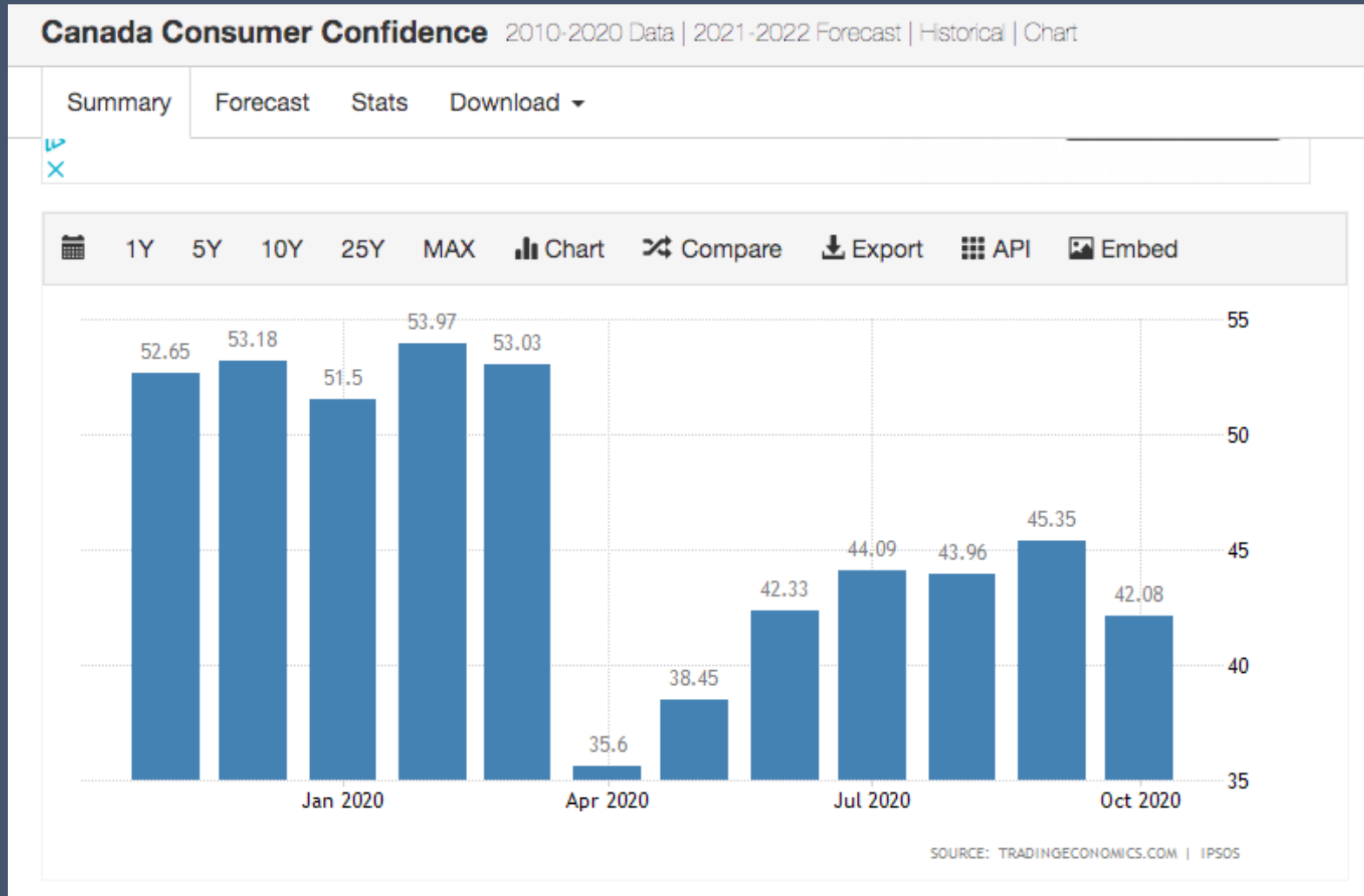
The Great Reset



Consumer confidence 2010-20



Canadian consumer confidence, 2020





A pig outside of its pen. TLOREN/ISTOCKPHOTO

Are antibiotics turning livestock into superbug factories?

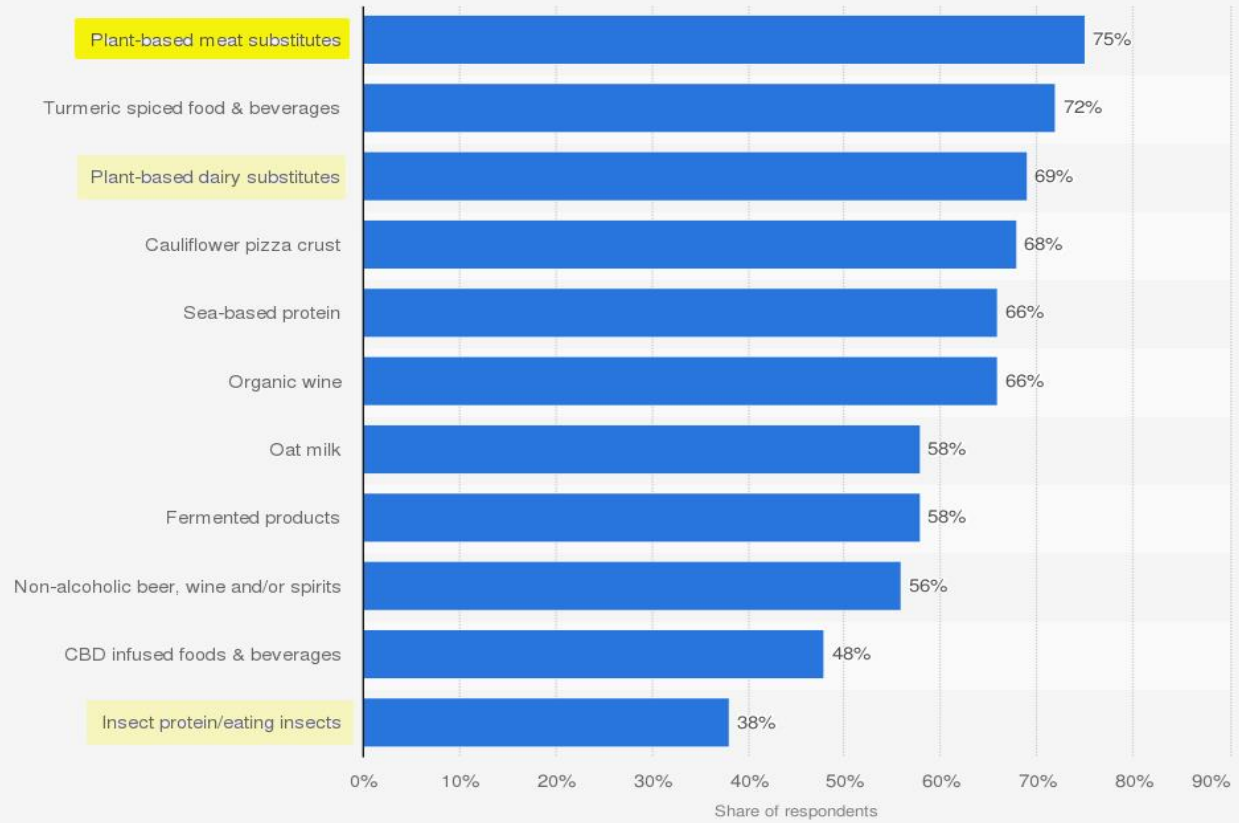


Consumer
concerns

Health (antibiotics
Animal welfare (also antibiotics)
Sustainability

Health

Interest in healthy food trends in Canada in 2019

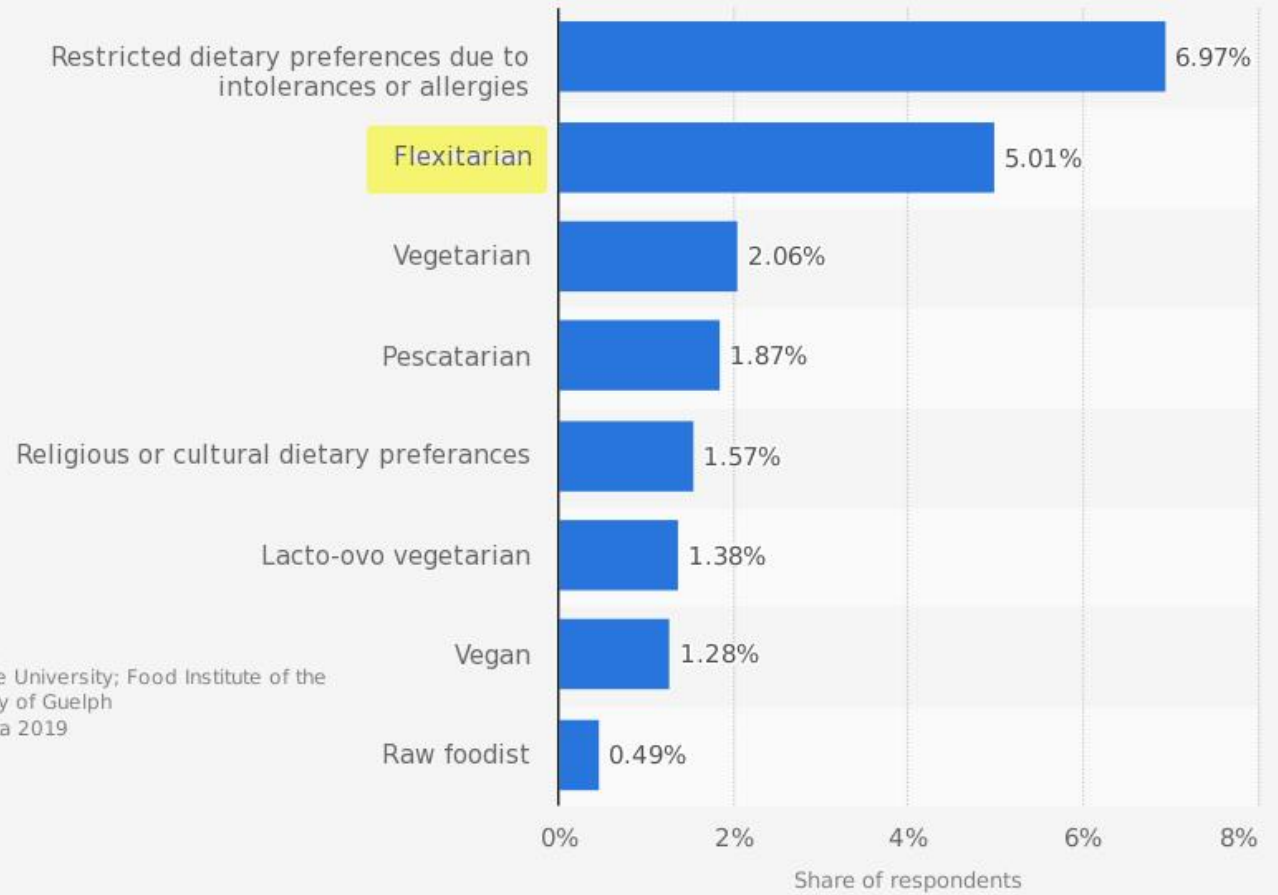


Source
Pearl Strategy and Innovation Design
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Additional Information:
Canada; 2019; 1,100 respondents; Survey respondents were split between Millennials, Gen X & Boomers; Online survey

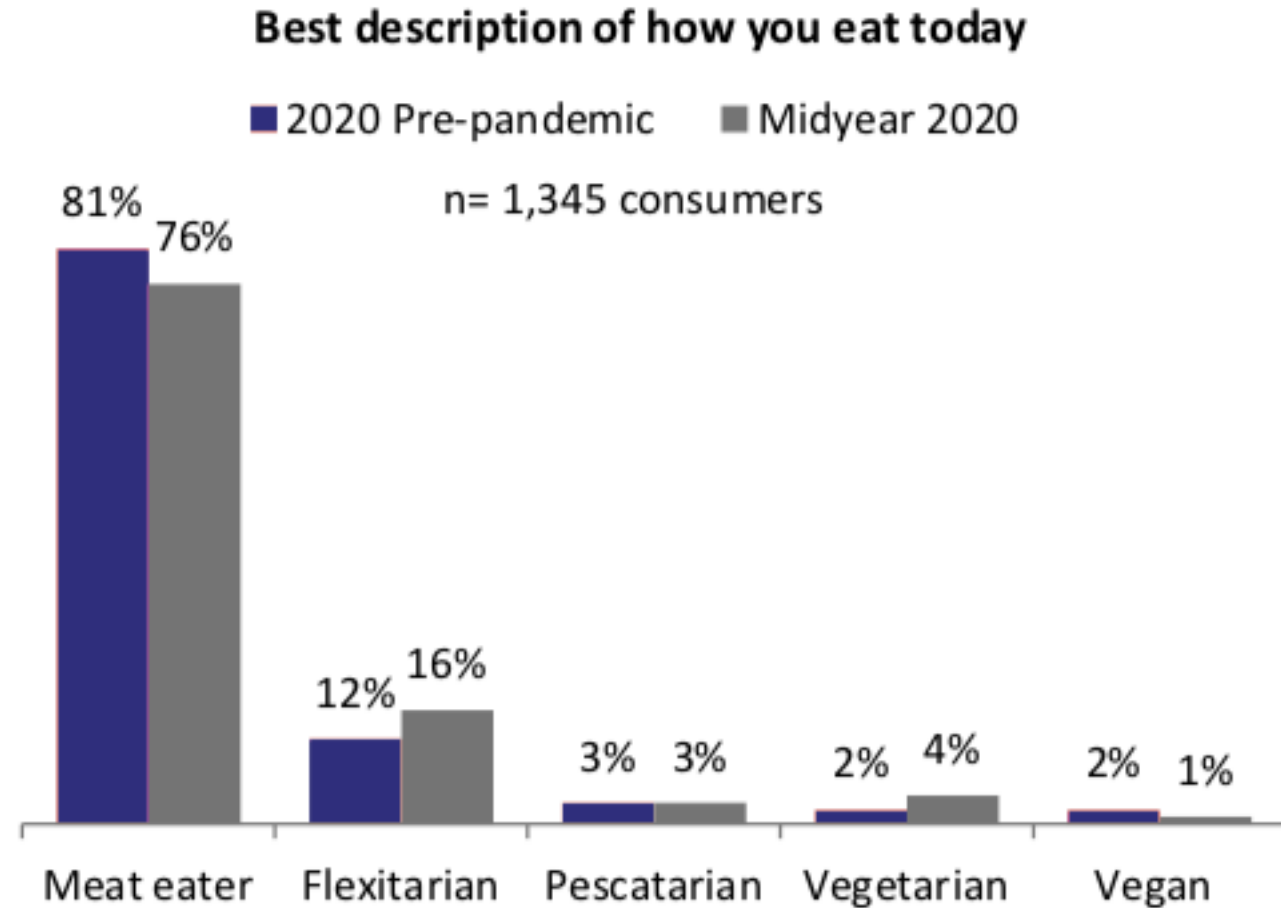
Flexitarians

Share of consumers who follow specialty diets in Canada as of February 2019, by type



Sources
Dalhousie University; Food Institute of the
University of Guelph
© Statista 2019

Flexitarians in a pandemic



Source: 21o Analytics LLC, Mid-Year POM report

Flexitarians:
Who are they?

Younger
Women
Urban
Singles, couples
Any income

Animal welfare

Food safety (54%)

Climate change (50%)

Humane treatment of farm animals (49%)

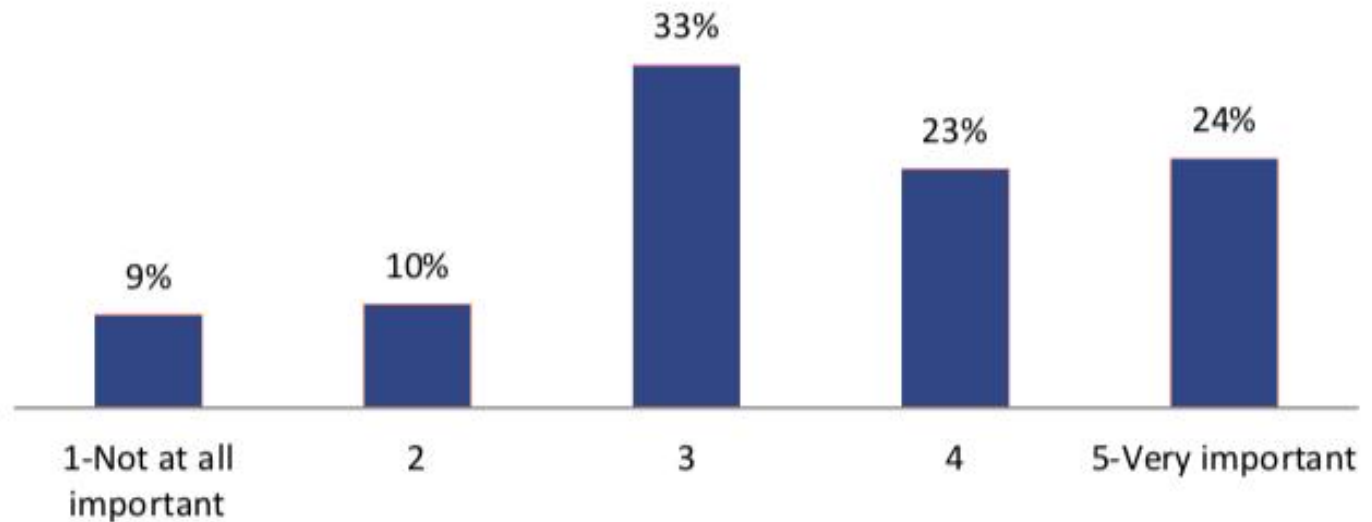
Having enough food for Canadians (46%)

Having enough food to feed others (29%)

Source: Canadian Centre for Food Integrity

Animal welfare in a pandemic

Importance of having information on how and where the livestock was raised and processed, whether from the brand or grocery store



Source: 210 Analytics LLC, Mid-Year POM report

Who else cares
about animal
welfare?

Consumers buying claims-based meat (62%)

Higher income (57%)

Younger consumers

(e.g., millennials, 56%,
baby boomers, 30%)

Shoppers who buy through specialty
channels (71%)

Source: 210 Analytics LLC, Mid-Year POM report

Take note

Younger consumers \neq animal ag
can be environmentally sustainable

Sustainability

Consumers are paying increased attention to how a company treats its employees

Which best describes how often you are doing each of the following items¹
% of respondents

■ Doing less ■ Doing about the same ■ Doing more



Source: McKinsey & Co.

Consumers
are more
concerned
about ...

- ... Their health
- ... Animal health and welfare
- ... Meat supply chain employees' health and welfare
- ... Sustainability in general

What does this
mean for the
meat supply
chain?

Communicate, communicate, communicate

Have something to communicate

Supply chain transparency



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