

10-11
DÉCEMBRE
2019

LE
PORC
SHOW

CONFÉRENCES • EXPO • FESTIVITÉS

6^e
édition

LE
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6^e
édition

How does marketing influence our food choices?

On the menu

**Marketing
influences our
choices**

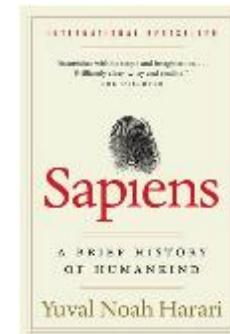
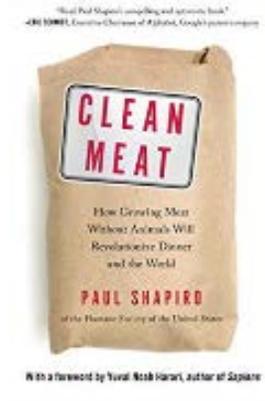
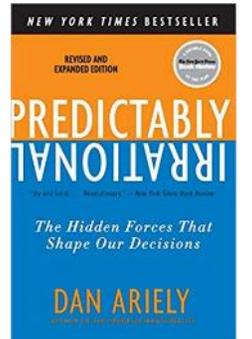
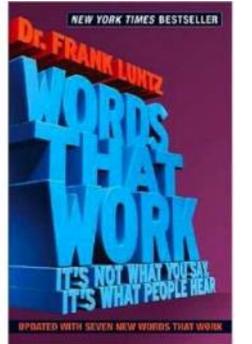
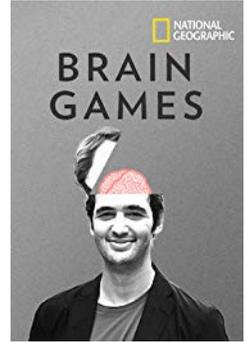
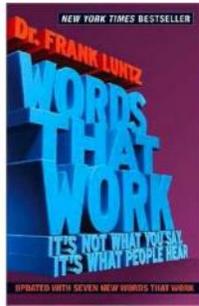


**The only
constant thing
is change**



How do we hold our own?

SOURCES OF INFORMATION



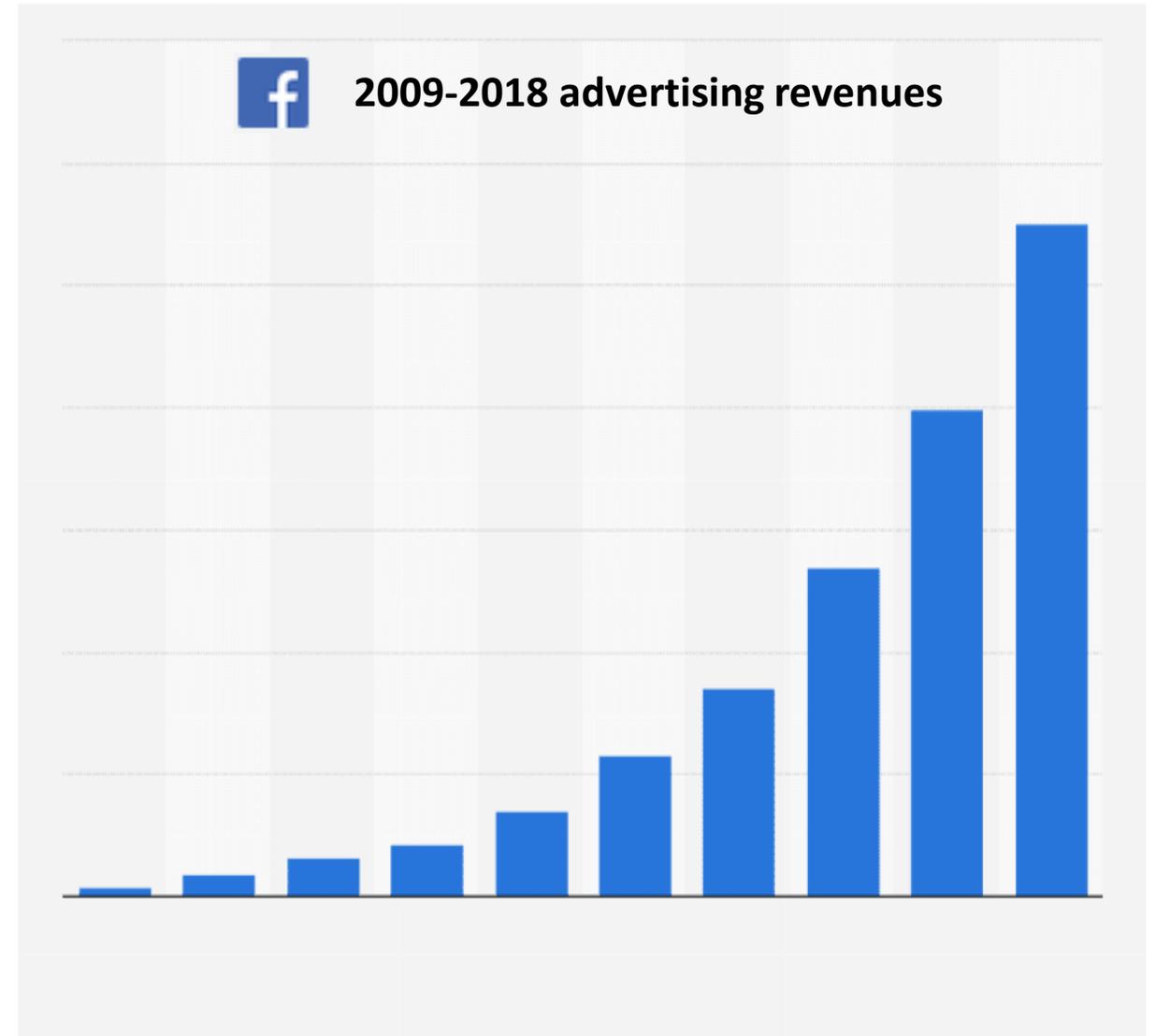
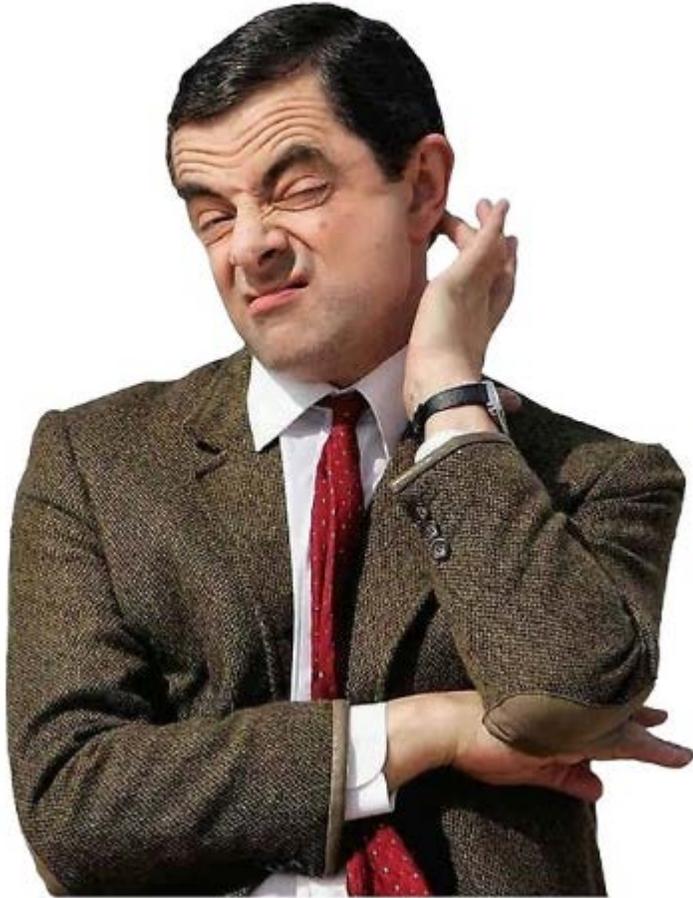
Part 1

**Marketing
influences our
choices**

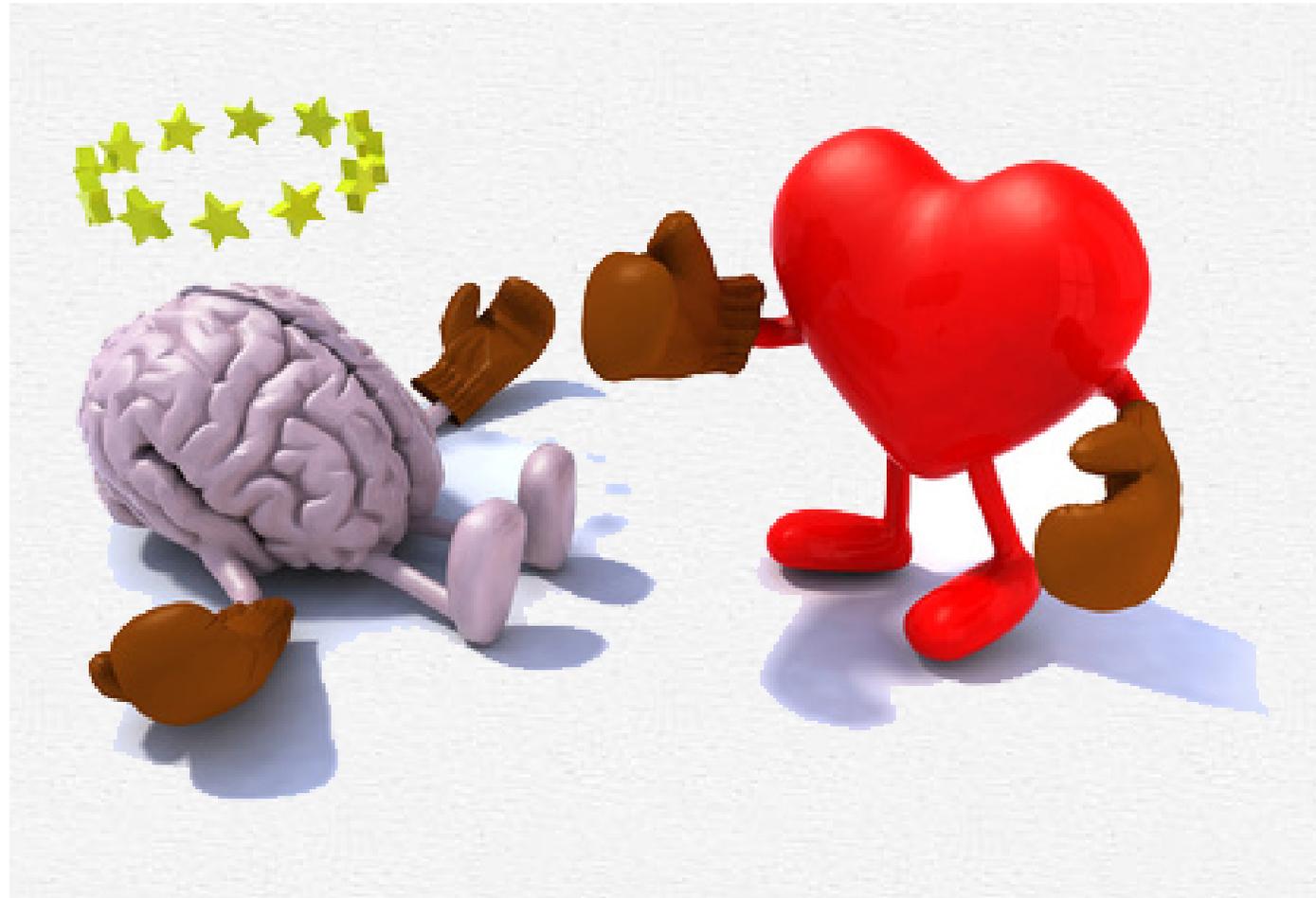
The only thing
constant is
change

How do we hold our own?

Marketing influences our choices...



We choose with our emotions, based on our perceptions.



Marketing tools





\$2.99



VS.



\$25.00



\$1,859.00
Apple iPhone XS
512GB Gold Apple...
Apple



10\$

9.99\$





PLACE



VS



Donate!

- \$5
- \$25

Donate!

- \$5
- \$25
- \$125



DON'T KEEP CALM
BECAUSE
THE SALE ENDS
TOMORROW!

75% discount
on \$11.99
vs
5% discount
on \$179.99

SUPER SPÉCIAL 2 POUR 1

-50%

» AJOUTEZ 1\$
POUR OBTENIR UNE 2^e BOÎTE

FAITES VITE!

\$399.99 instead of \$599.99



REVISED PRICE, \$200 DISCOUNT



22 996 \$

Kilométrage
99 400 km

Année
2013

CARFAX CANADA INFO

VOIR L'INVENTAIRE

Alliance
info prêt.com
490-486-1566
ACHAT-VENTE-FINANCEMENT

Various elements influence perception



Characteristics

Appearance,
ingredients, nutrition,
origin, etc.

Packaging

Colours, design, format,
texture, materials used,
etc.

Allegations

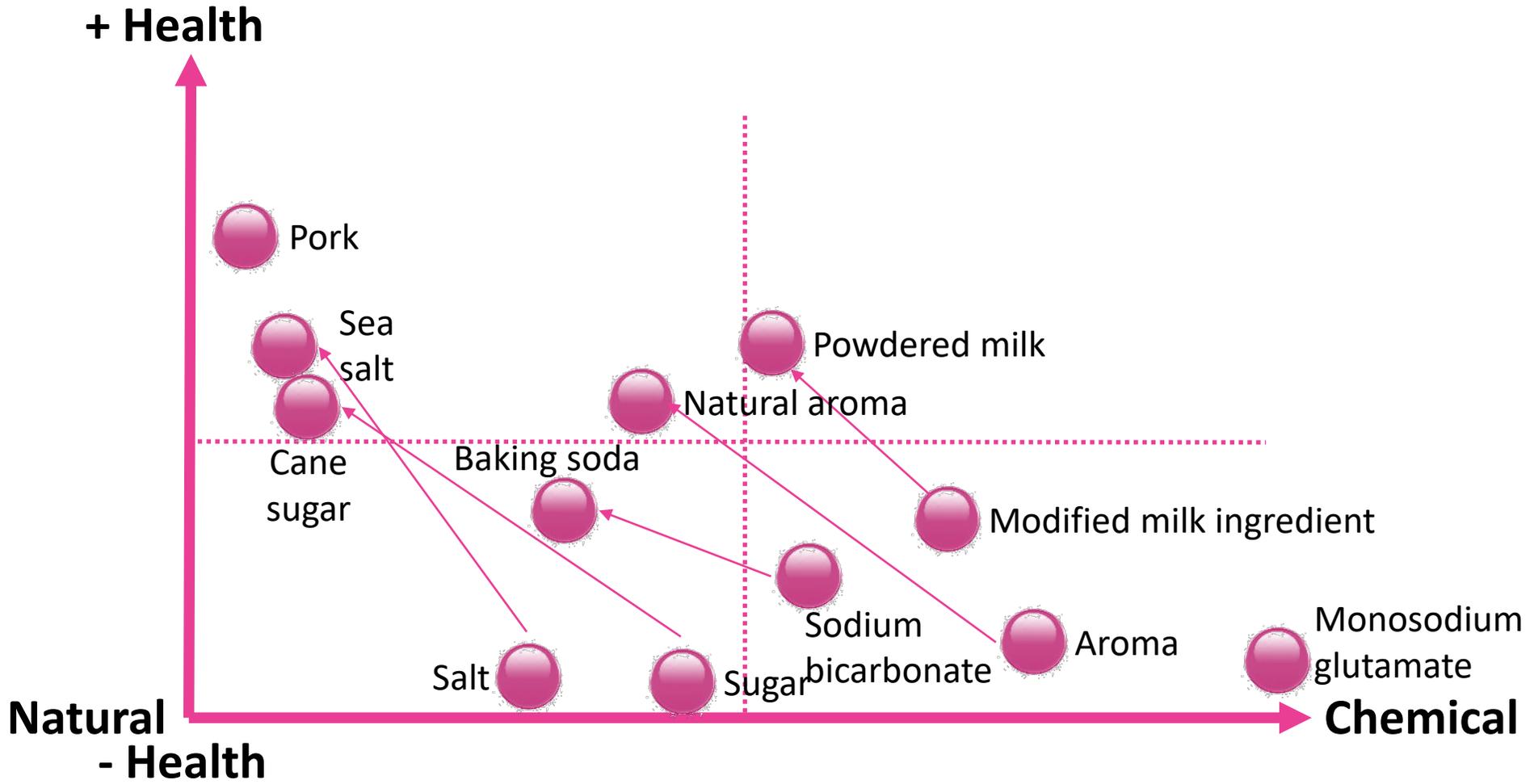
Promise, characteristics,
benefits, values, etc.

P
E
R
C
E
P
T
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O
N



Product

Ingredients: naturality vs health



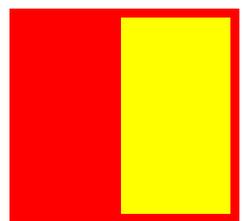


Product

Packaging: Colours



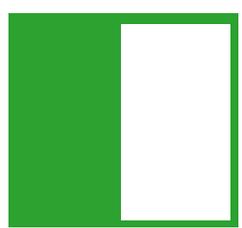
= **Quality
Upscale**



= **Works up an appetite
Affordable**



= **Purity,
Lightness**



= **Healthy**



= **Naturality,
Simplicity**



= **Less salt, fat
Diet**



= **Natural,
Plant-based**



= **Authentic,
quality, tasty**



Colour ↔ promise match

Product





Product

Product allegations



The importance of a “local” product

LOCAL = DESIRABLE



4/5

of Canadians want **LOCAL** products

2/5

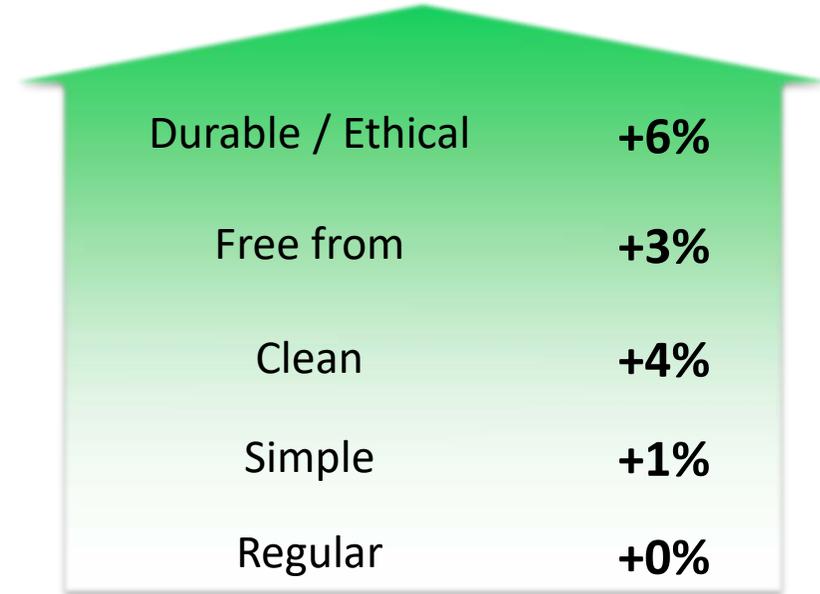
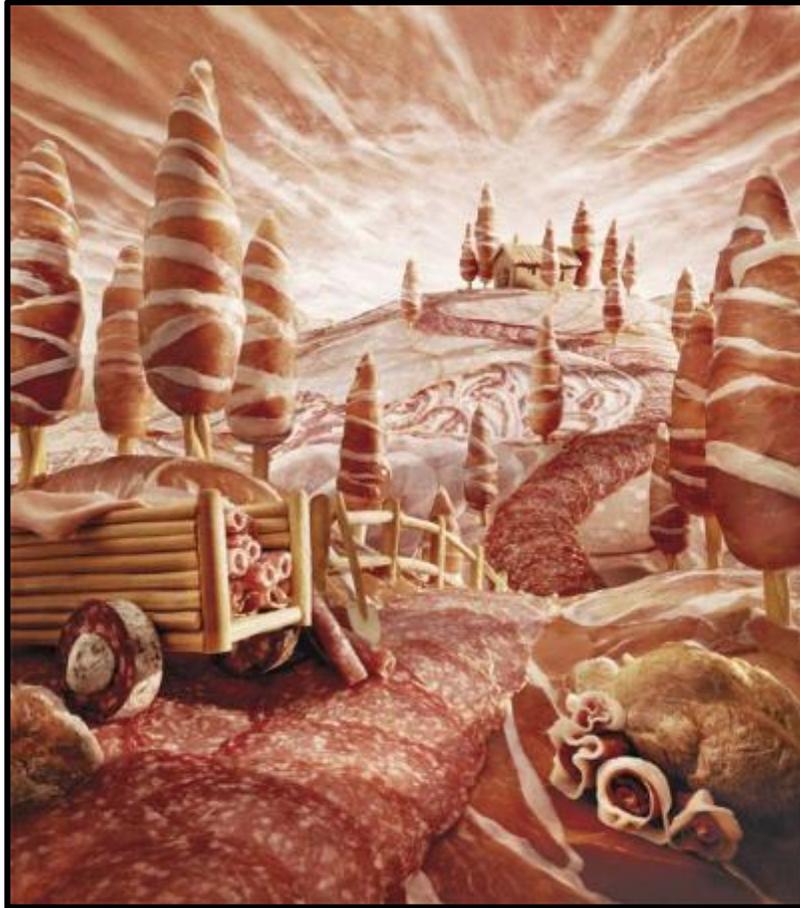
are ready to pay more



- “Local”: especially important for **millennials, families**, household income of **\$100,000 +**
- More important than a clean label

Importance of the clean label

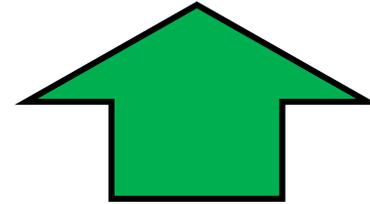
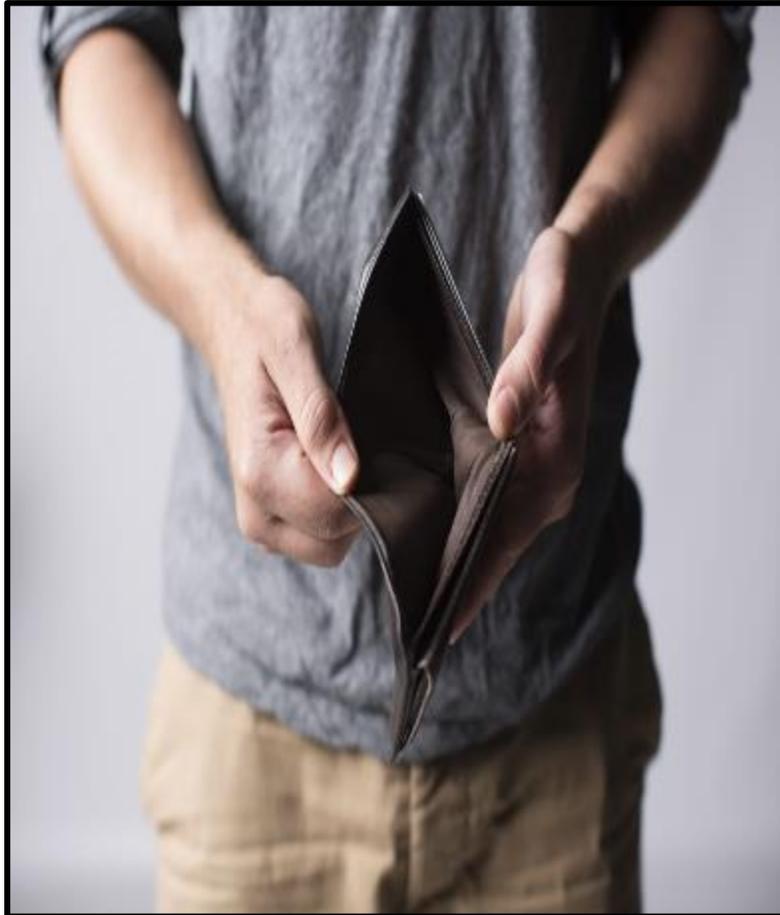
VALUE ADDED = GROWTH



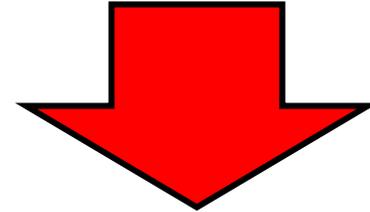
- The clean label is a basic trend and is there to stay
- **Millennials** are especially sensitive to the clean label

Are we ready to pay more for the clean label?

LIMITED WILLINGNESS AND ABILITY TO PAY



Strong interest in allegations (4/5)



Little interest in paying more... (1/3)



- **Millennials** and **parents** are those most open to paying more for sought-after allegations.
- It is important to identify allegations that are cheap and well perceived (e.g. "Source of protein").

Factor limiting clean label interest

#1 LACK OF TRUST



<1/4 of Canadians trust allegation on food packages



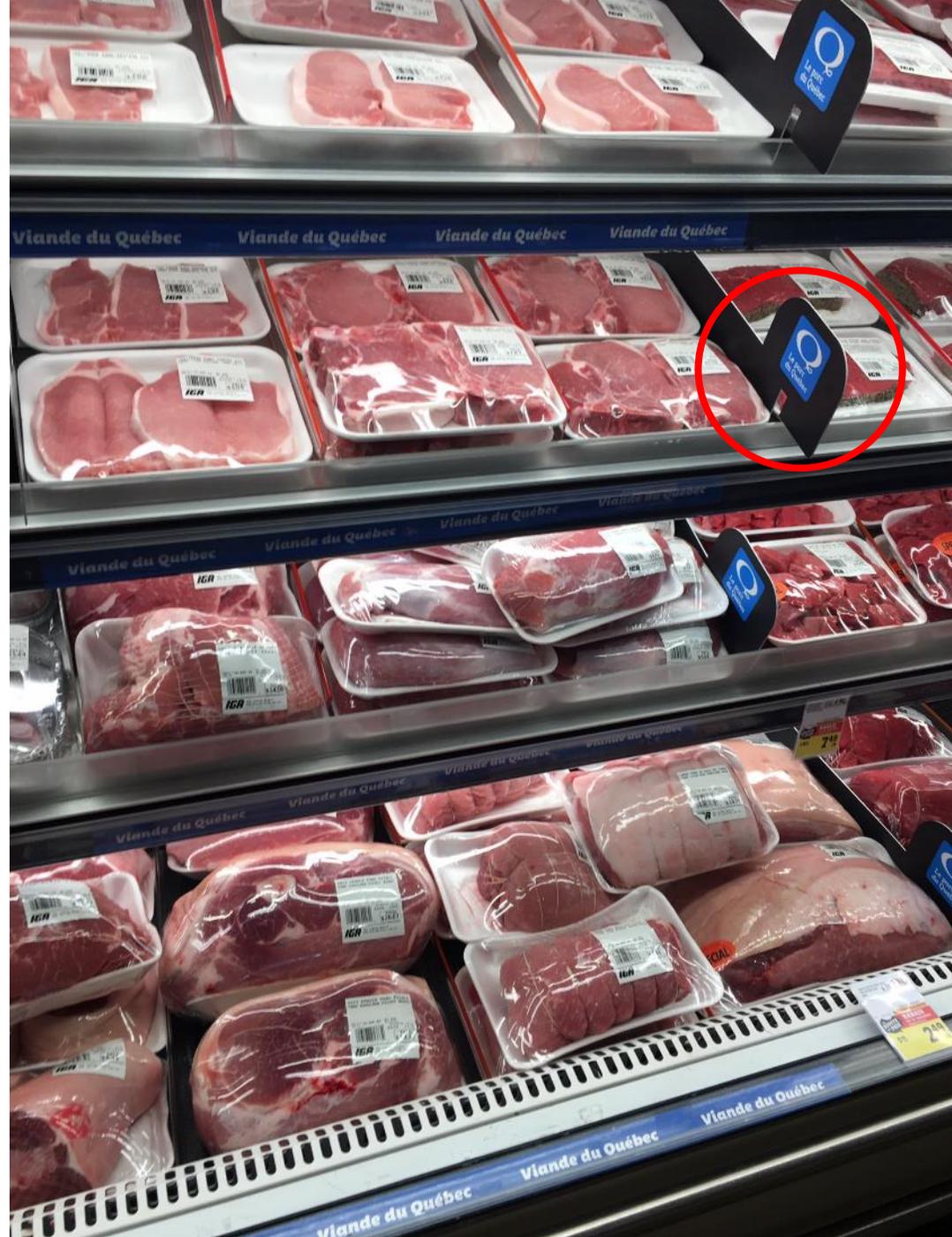
- Transparency is essential
- Accreditation from renowned third parties



Importance of a
“local” product

Factual accreditation

Third party
accreditation



Part 2

Marketing
influences our
choices



**The only
constant thing
is change**



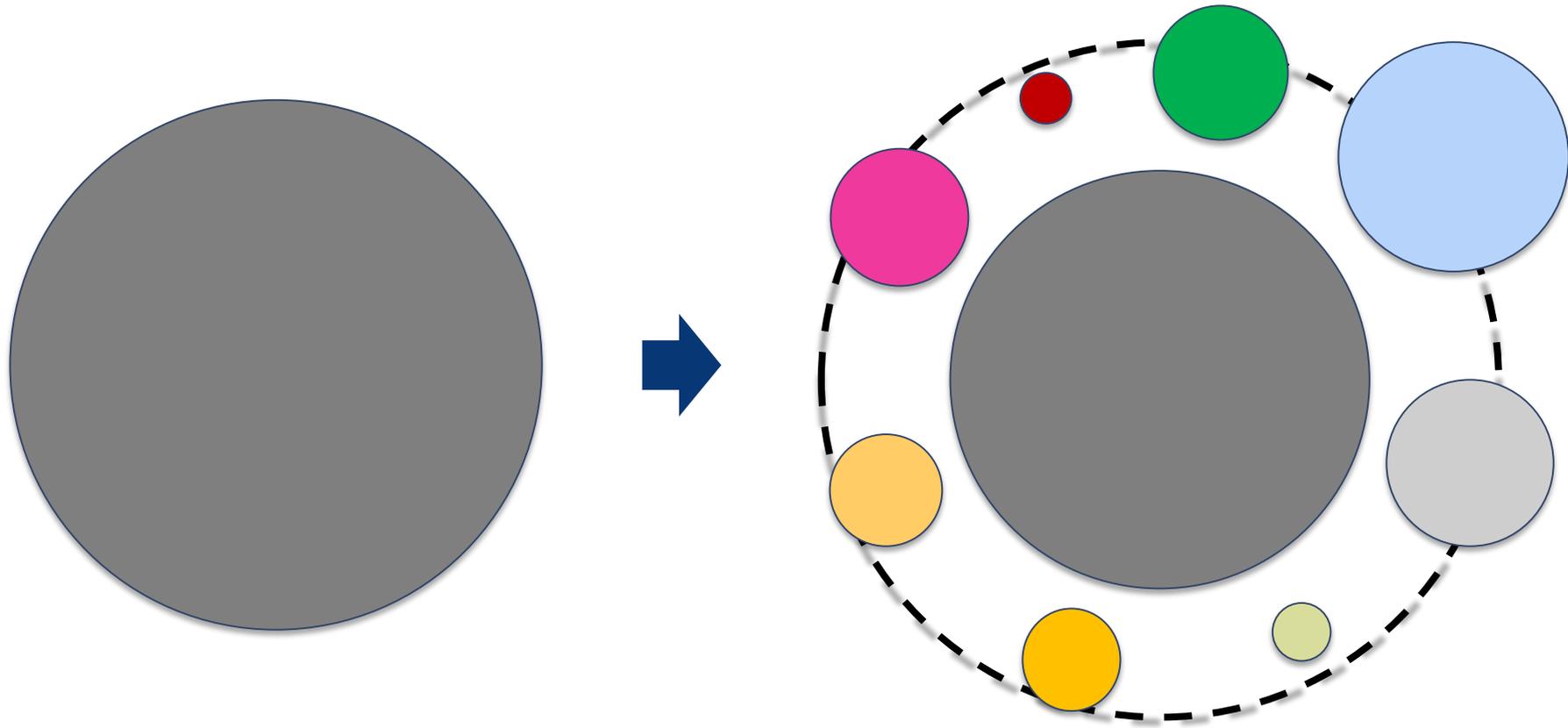
How do we hold our own?

Consumer trends



1. Market fragmentation
2. Changing perception of meat
 - Consumption
 - Health
 - Ecology
 - Social acceptability
3. Sociodemographic changes

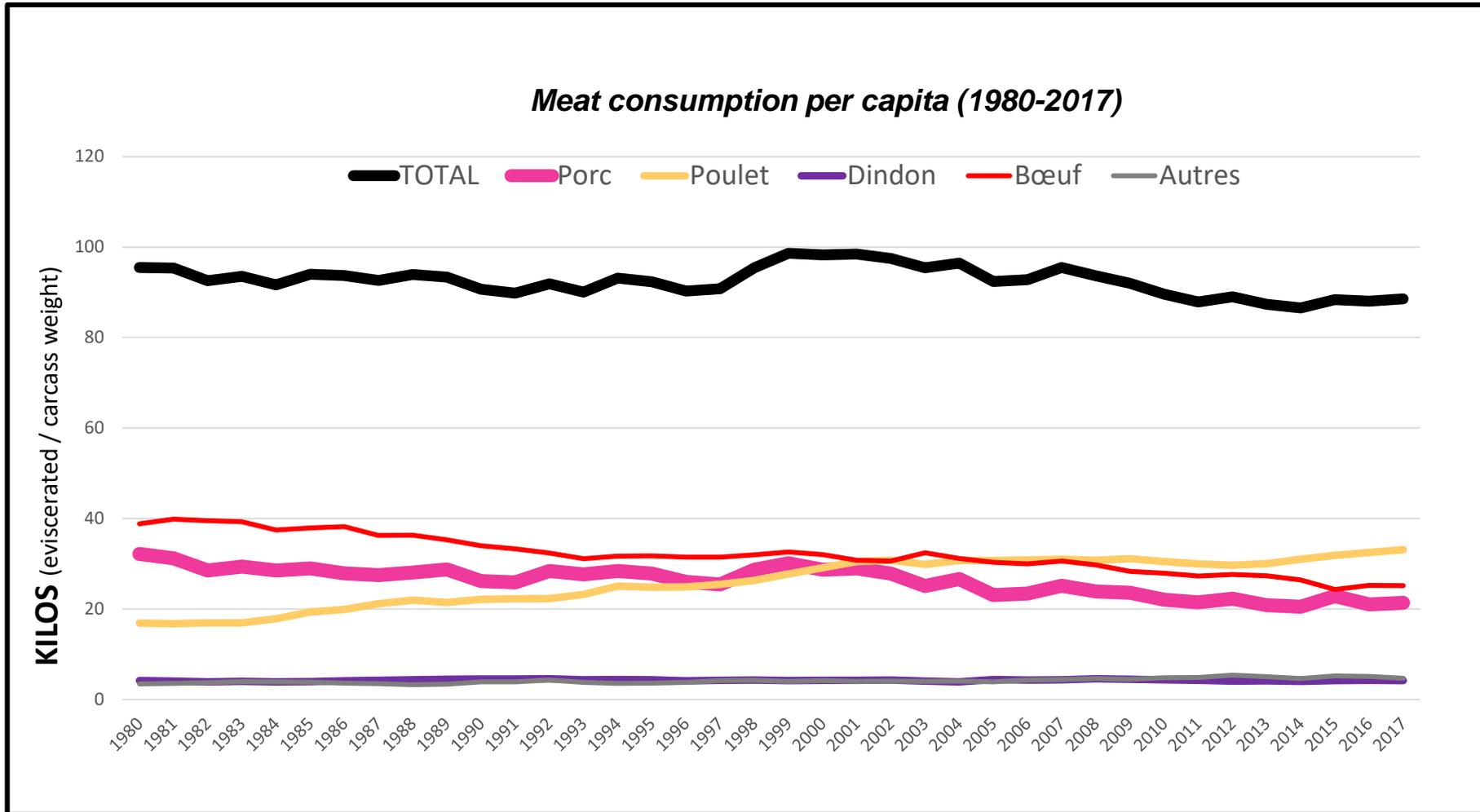
1 – Market fragmentation



2 - Changing perception of meat



Downward consumer trend



2/5

of Canadians want to **limit**
their **meat** consumption



Flexitarians

Health perception?

CANCER



These are **Group 1 Carcinogens**.



Group 1 Carcinogens are substances with the greatest scientific evidence for causing cancer.

"CANCER STICKS", 1950s



"CANCER STICKS", 2015



Ecological impact perception?



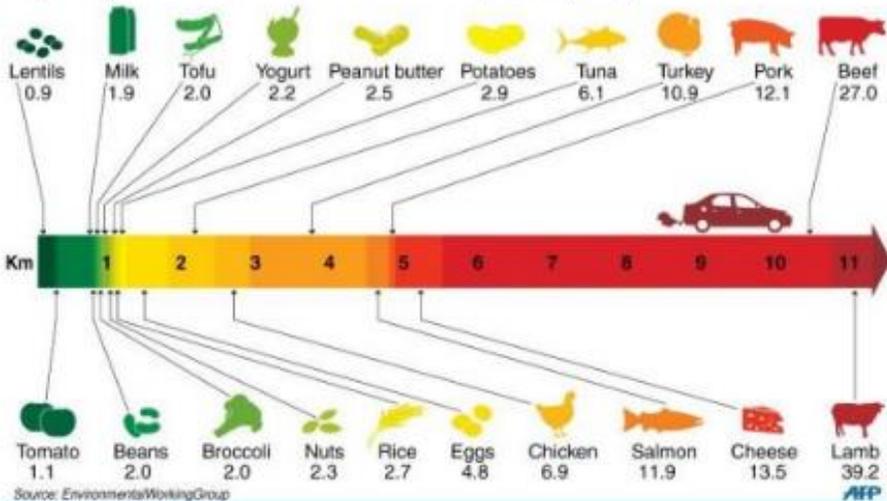
Réduction de notre empreinte carbone de **30 % d'ici 2030**

Les Compagnies
Loblaw
Limitée

Carbon footprint of what you eat

Calculations of greenhouse gas emissions from the production, processing and transportation of specific food items

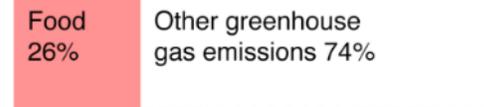
■ Main chart compares 110g of food against a journey in a mid-sized car
■ Number shows kg of carbon dioxide equivalent produced per 1kg of food



How much impact does food have?

Proportion of total greenhouse gas emissions from food

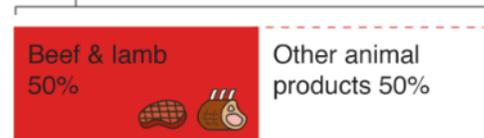
A quarter of global emissions come from **food**



More than half of food emissions come from **animal products**



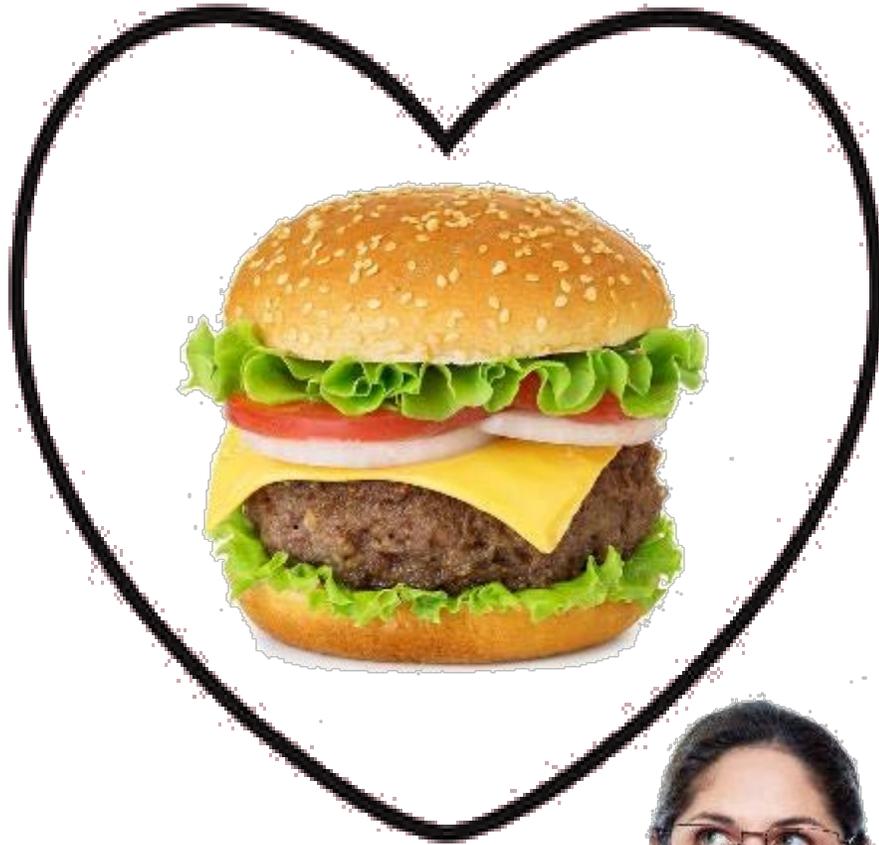
Half of all farmed animal emissions come from **beef and lamb**



Source: Poore & Nemecek (2018), Science

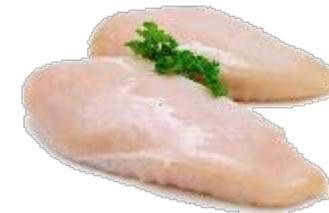
BBC

Social acceptability?

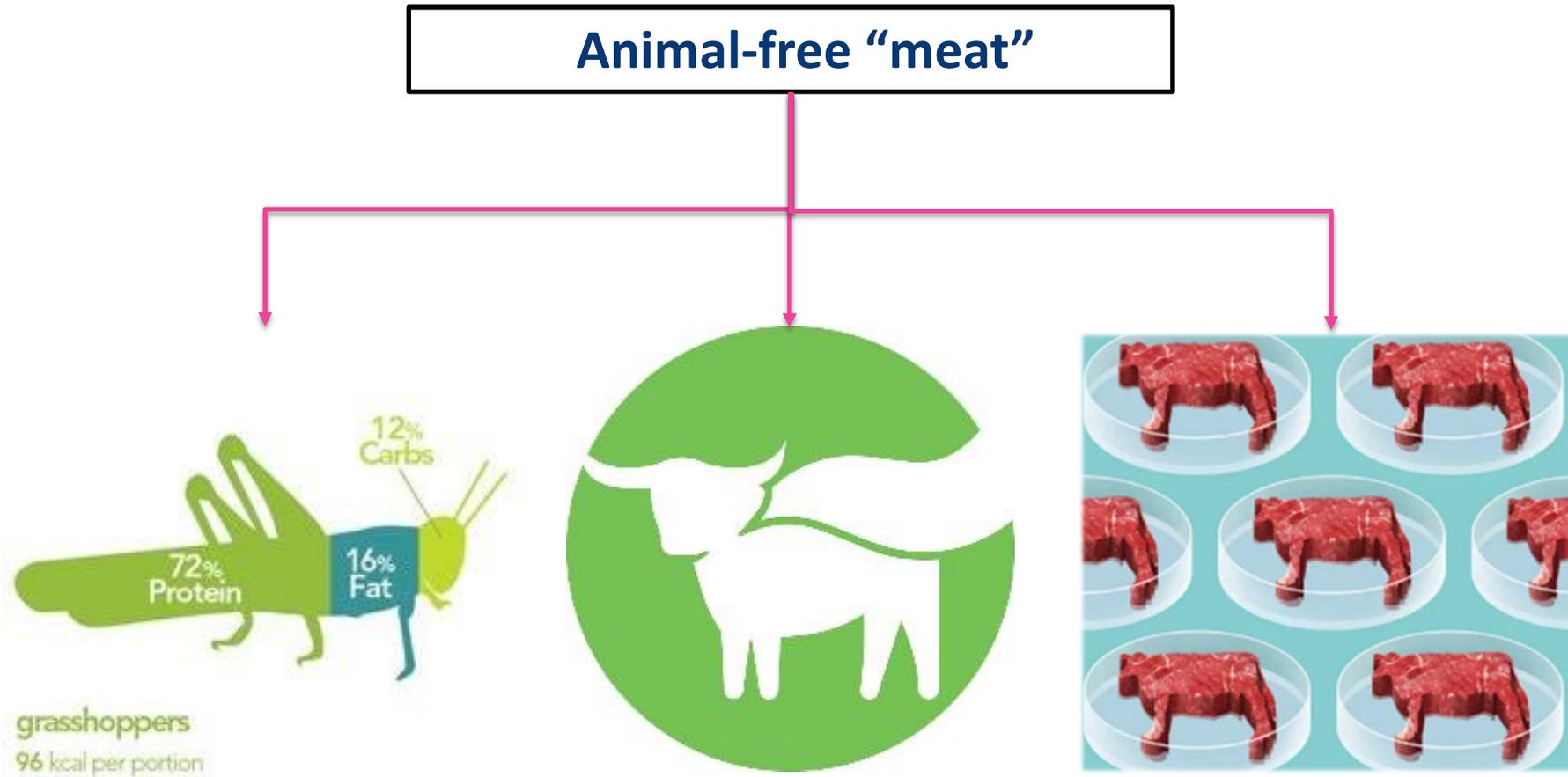


Market responses

Evolution of the meat offer



Market responses (cont'd)

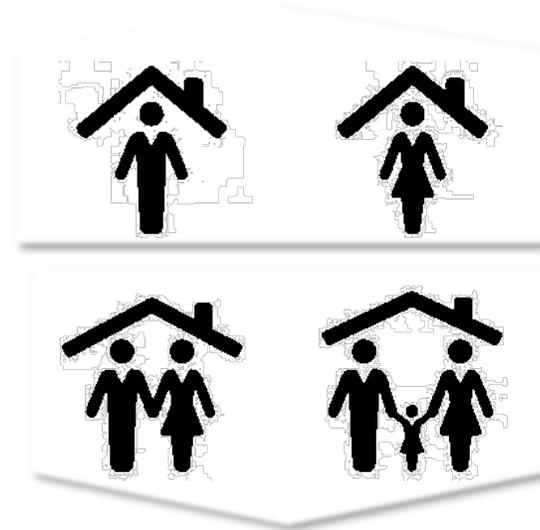


3 – Demographic changes

AGEING POPULATION



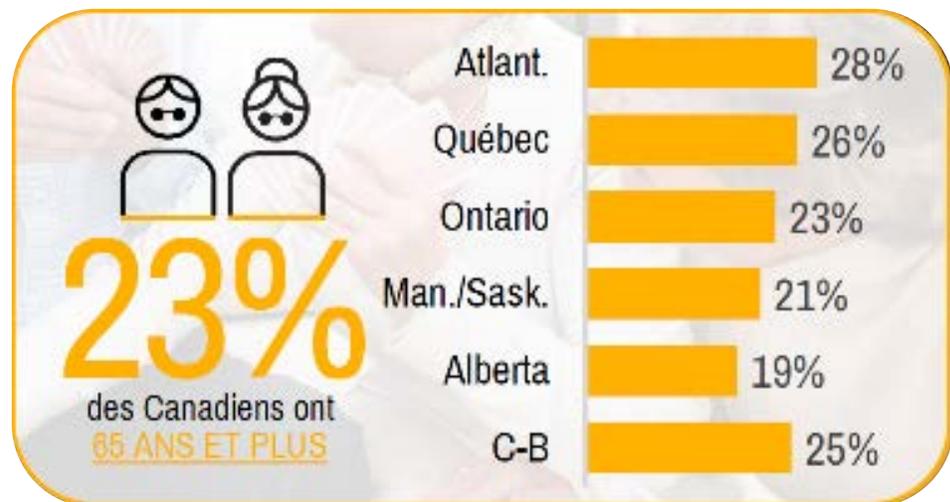
SMALLER HOUSEHOLDS



MILLENNIALS

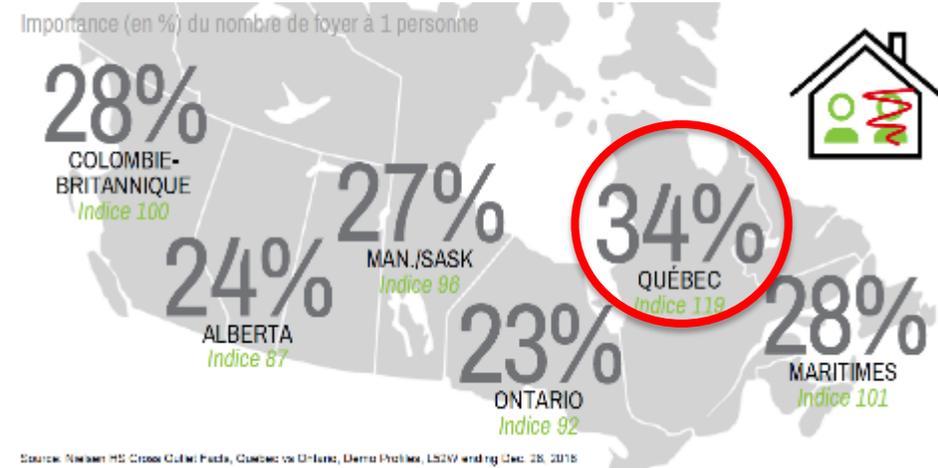
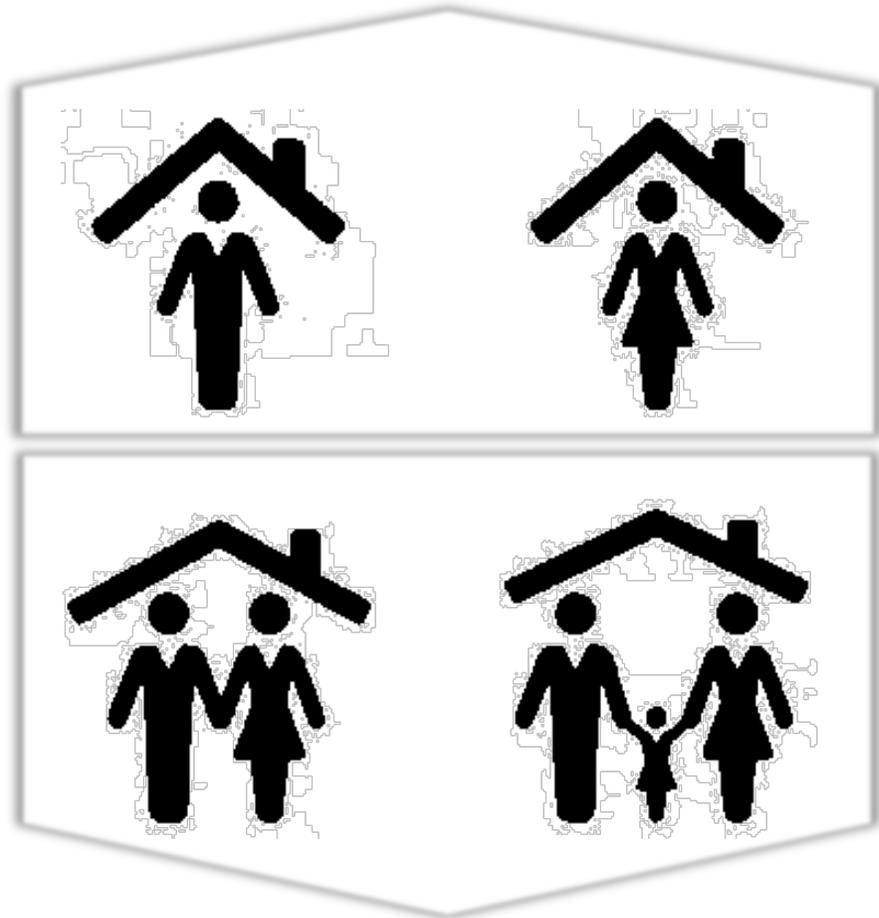


Ageing population



- Buy more products on sale - flyer
- Want less salt, more fiber
- Go to the grocery store to purchase their products
- **Want to see the meat before buying it**
- **Want to eat less meat for health reasons (especially red meat)**

Smaller households



- Smaller portions and packages or multipacks
- More HMRs / restaurants

Millennials

20-25% of Canadians (as significant
as boomers)

QC i90
Ont i100



- Don't shop in stores as much (116 vs 186 boomers)
- Buy online more (177) than in supermarkets (77)
- Eat out more often (240 vs 140 boomers)
- Buy boxed meals (17% vs 6% boomers)
- Fewer meals, more snacking
- "Ethical" considerations for their purchases
- Vegetarian 2x more developed vs gen pop.
- Don't like to touch meat

Part 3

Marketing
influences our
choices



The only
constant thing
is change



How do we hold our own?

Good news #1

Proteins are trendy!



25% GROWTH **12%**

Number of new protein products



Products with the tag line "Excellent source of protein"

INGREDIENT → BENEFIT

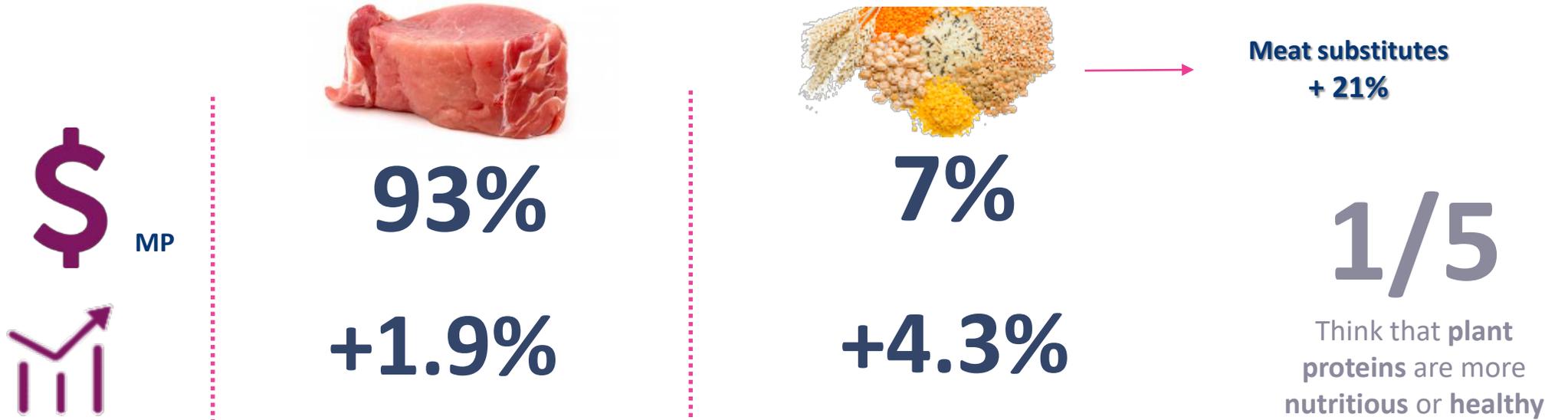


¹Innova Market Insights, 2018 trends report

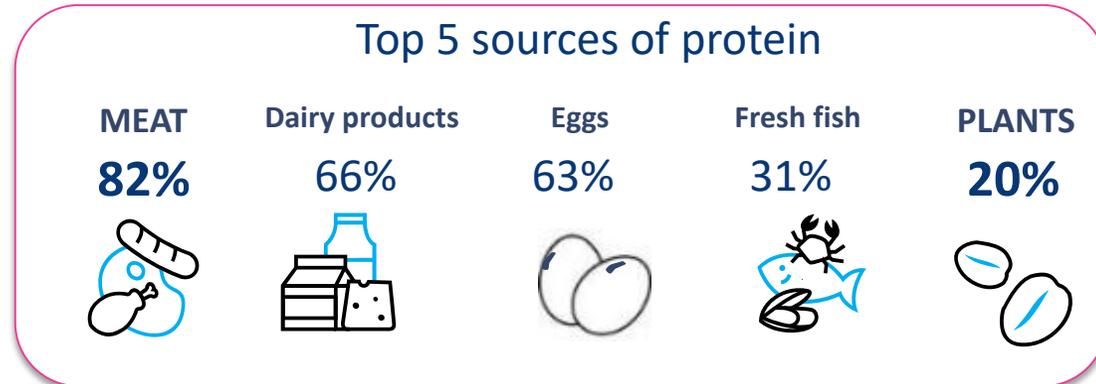
² http://www.nutraceuticalsworld.com/issues/2017-11/view_features/key-trends-in-functional-foods-beverages-for-2018/1931

Good news #1 (cont'd)

Meat is THE most important source of protein



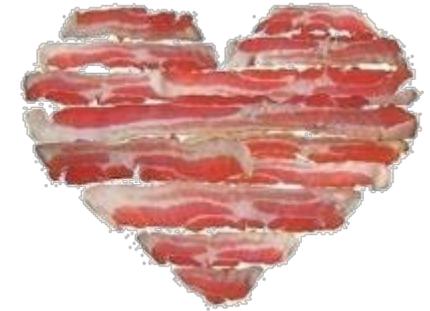
31% "Important source of protein"



BUT...
Meat is an excellent source of complete and highly digestible protein!

Good news #2

The look and taste promise of meat are aspirational



"A PLANT-BASED BURGER FOR PEOPLE WHO LOVE MEAT" Impossible Meats

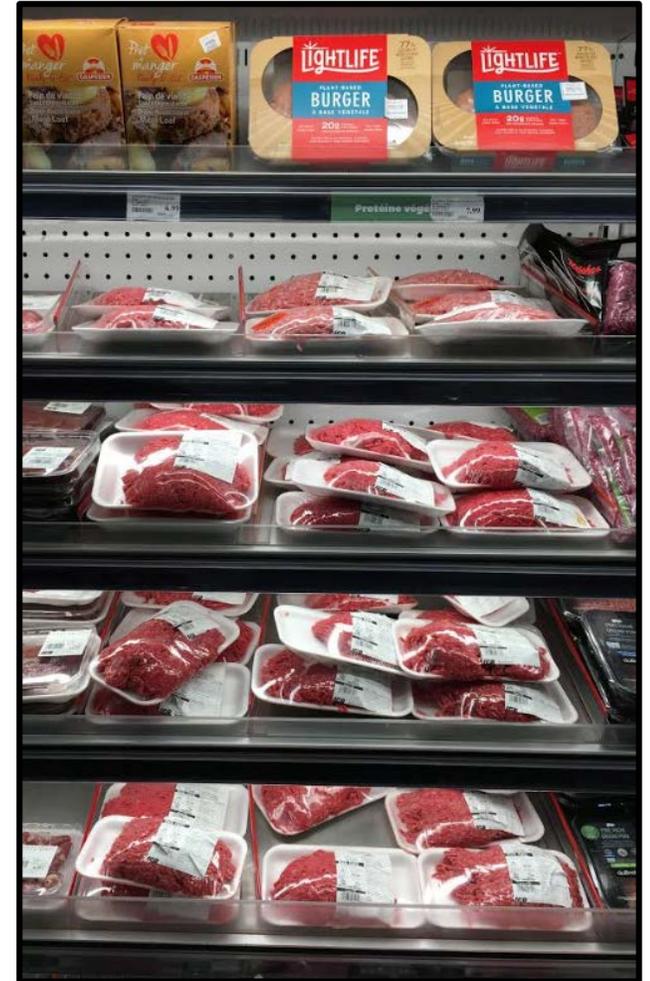


Good news #3

The meat market is still very significant

ANIMAL PROTEINS

\$22.6MM +1.5% 
\$5.86MM +0.9% 



PLANT PROTEINS

\$1.7MM +3.6% 
\$414M +3.3% 

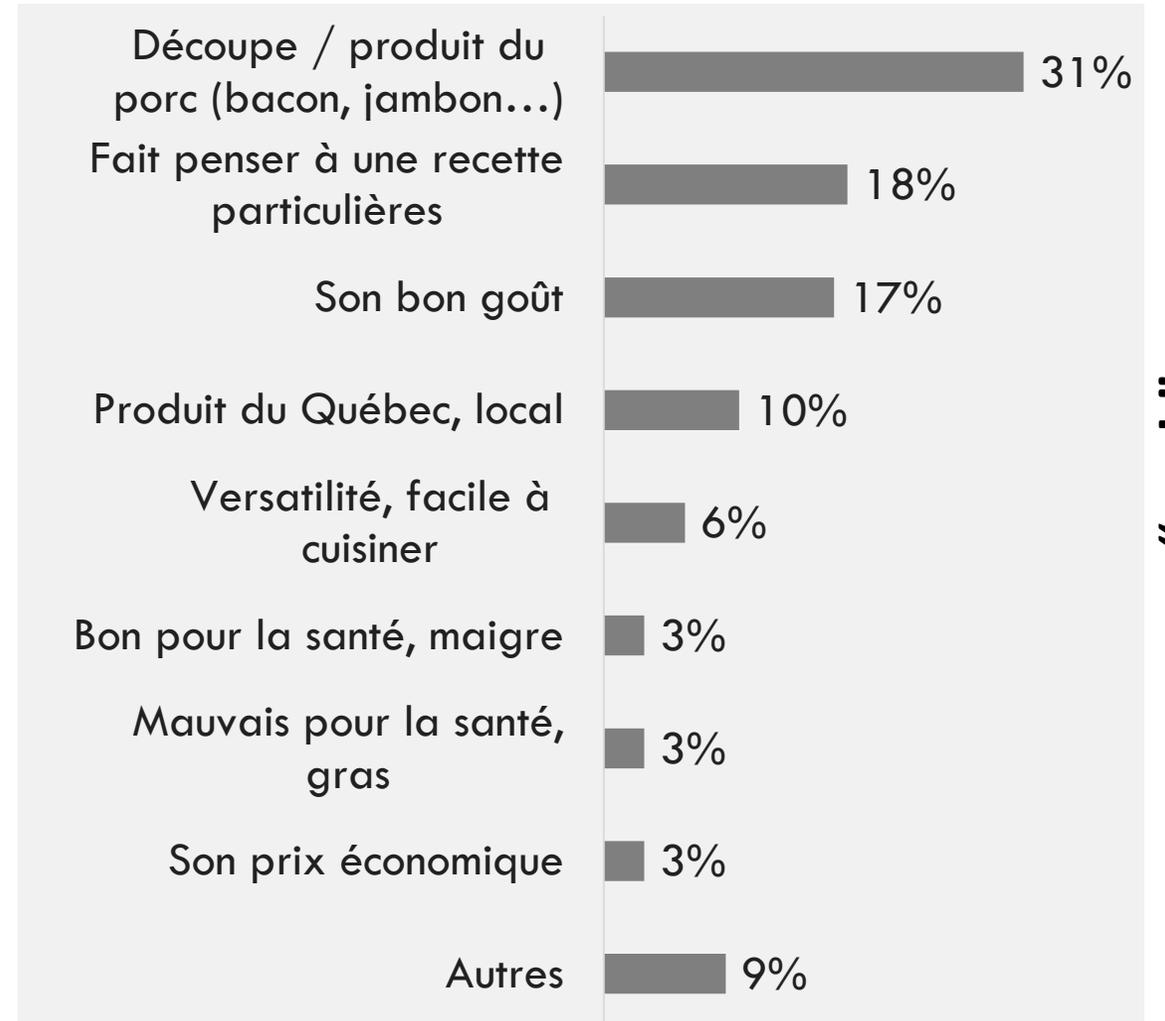


“meat” ≠ “pork”

“meat”



“pork”



What is the first thing that comes to mind when you think of PORK/ QUEBEC PORK/ BEEF / MEAT?
Basis: General French population of Quebec

“pork” ≠ “red meat”



“meat”

“pork meat”

viande hachée

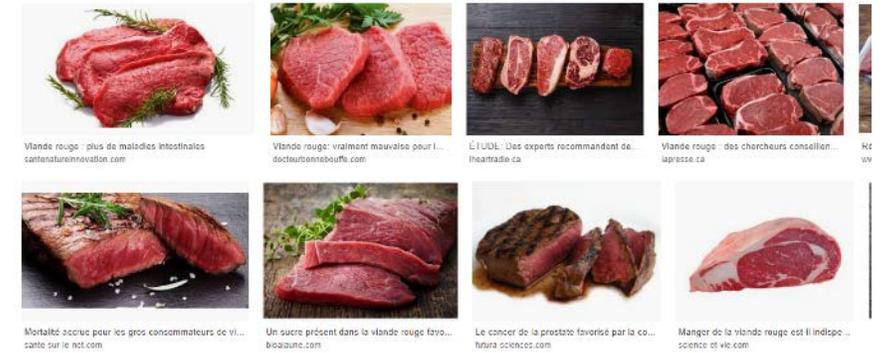
viande blanche

cancers

controverse



Consommation de viande en France | Nutrition 6 s...
 Les viandes : bœuf, veau, porc, poulet...
 Tout sur les parties de viande - Alimentation - Santé...
 Viande aviaire - les 142 kilos restants identifiés - Le Point...
 Top 4 d'antioxydants dans la viande |...
 Manger de la viande (sage, salé, indigeste...
 Procédure de cuisson - il est urgent de connaître...
 Différence viande de viande pour l'organisme...
 Comprendre le langage de la viande - Santé...
 Un sucre présent dans la viande rouge | Santé...



Viande rouge - plus de maladies intestinales...
 Viande rouge: vraiment mauvaise pour l...
 L'ILUJ: Des experts recommandent de...
 Viande rouge - des chercheurs conseill...
 Mortalité accrue pour les gros consommateurs de vi...
 Un sucre présent dans la viande rouge favo...
 Le cancer de la prostate favorisé par la co...
 Manger de la viande rouge est-il indispo...

“red meat”

porc haché

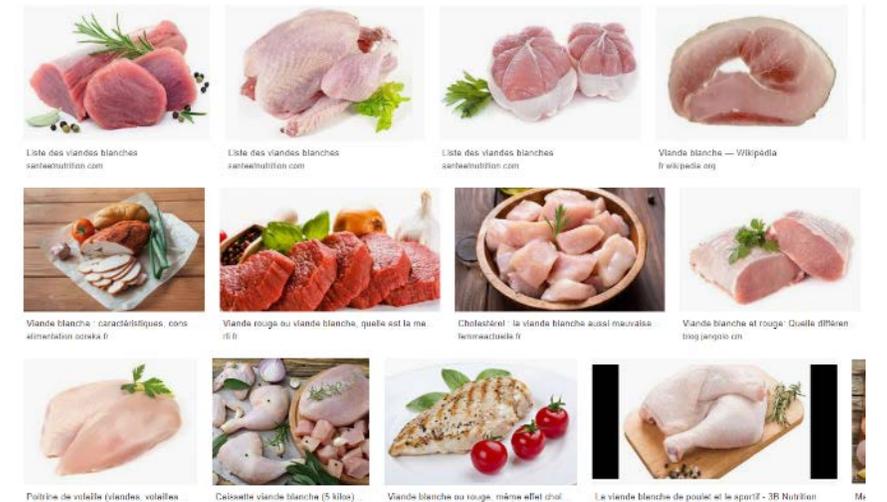
cuisson

cholestérol

accords mets



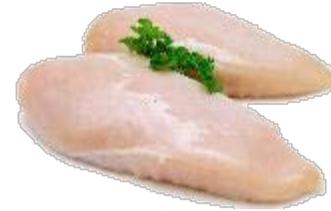
1 porc (porcelet) - tout savoir sur porc...
 Viande De Porc Cook Sur Pinterest |...
 Etude de viande de porc (porc) dans le monde...
 Menu de viande au porc...
 Le CULOTTE (C) | CASCAL |...
 Cuisine - La viande De Porc |...
 Viande de porc - Viande saine - L'association de...
 Minceur et santé - Viande de porc...
 Tout Sur La Viande De Porc - L'association de...
 C'est le Pig viande de porc...
 Est-ce de porc - Avial en ligne - Viande d...
 Porc, bœuf, mouton, poulet, sa...
 Viande de porc - tout connaître pour bien la...
 porc de région jennaroit...



Liste des viandes blanches...
 Liste des viandes blanches...
 Liste des viandes blanches...
 Viande blanche - Wikipédia...
 Viande blanche - caractéristiques, cons...
 Viande rouge ou viande blanche, quelle est la m...
 Cholestérol - la viande blanche aussi mauvais...
 Viande blanche et rouge: Quelle diffère...
 Poitrine de volaille (viandes, volailles)...
 Cuisselette viande blanche (5 kilos)...
 Viande blanche ou rouge, même effet d'ail...
 La viande blanche de poulet et le sport? - 3B Nutrition...

“white meat”

Perception of red meat versus white meat



\$

56%

44%



>

53%



Source: Nielsen Panelviews survey, March 2017 - Canada

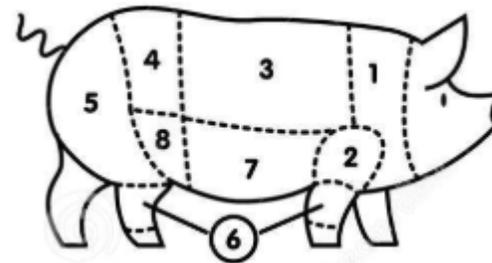
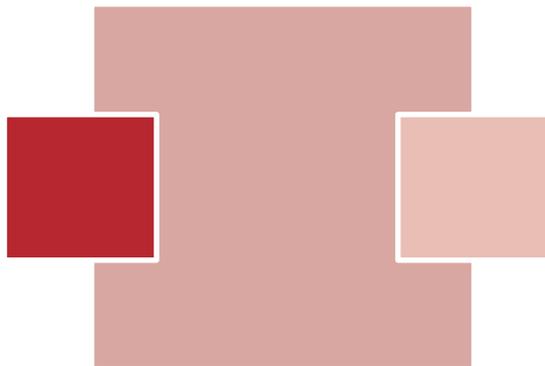
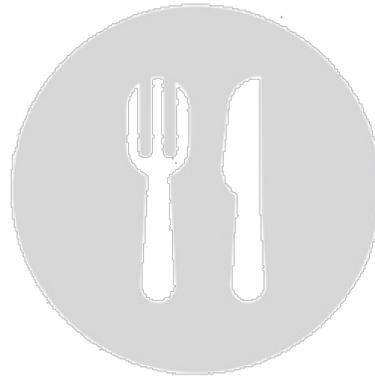
Source: Nielsen MarketTrack, National All Channels, 52 weeks ending March 2nd 2019

Good news #5

OLYMEL COMMUNITY

VISIONCRITICAL[®]
●●●●

We can influence people's perception



Good news #5

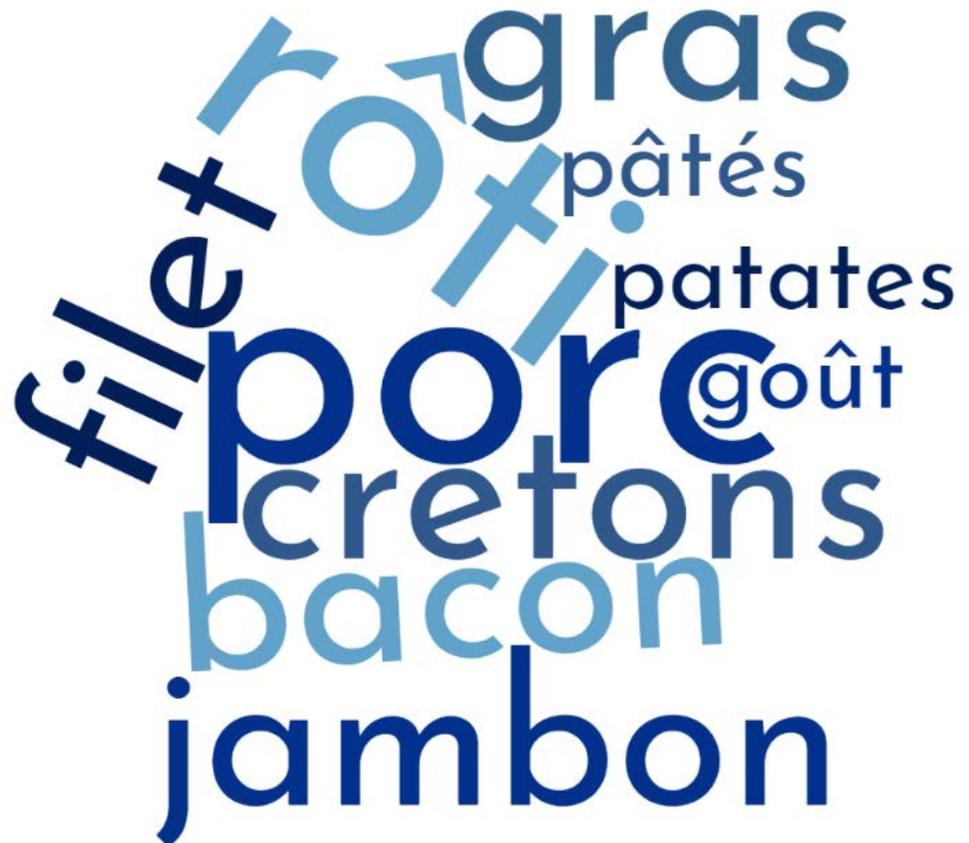
OLYMEL COMMUNITY

VISIONCRITICAL



We can influence people's perception

PORK



QUEBEC PORK



"Protein content" perception



% VERY HIGH PROTEIN CONTENT	(n=267)
red meat	60%
Beef	56%
Legumes (peas, chick peas, lentils)	43%
Chicken	39%
Turkey	39%
Quebec pork	39%
Pork tenderloin	39%
Pork	38%
White meat	36%
Pork chops	36%
Lamb	35%
Insects (crickets)	35%
Fish	34%
Tofu	25%
Grains and cereals (wheat, rice, barley, quinoa, etc.)	22%
Powdered proteins (e.g. lactoserum, hemp, etc.)	21%
Broccoli	15%
Bacon	14%
Italian sausage	13%
Meat-like plant products (e.g. Beyond Meat burger patty)	10%
Spirulina	7%

+ 1



Lactoserum



Spirulina



Insects



“Palatability” perception



+ 12

% VERY APPETIZING	(n=276)
Chicken	77%
White meat	65%
Quebec pork	64%
Pork tenderloin	64%
Beef	61%
Bacon	58%
red meat	56%
Pork	52%
Pork chops	51%
Broccoli	48%
Fish	48%
Turkey	48%
Italian sausage	37%
Grains and cereals (wheat, rice, barley, quinoa, etc.)	32%
Lamb	25%
Legumes (peas, chick peas, lentils)	24%
Tofu	7%
Meat-like plant products (e.g. Beyond Meat burger patty)	6%
Spirulina	3%
Powdered proteins (e.g. lactoserum, hemp, etc.)	2%
Insects (crickets)	1%

+ 8

"Ecology" perception



% VERY ENVIRONMENTALLY FRIENDLY	(n=234)
Broccoli	71%
Grains and cereals (wheat, rice, barley, quinoa, etc.)	62%
Legumes (peas, chick peas, lentils)	61%
Chicken	45%
Fish	44%
White meat	41%
Turkey	39%
Quebec pork	38%
Tofu	35%
Pork tenderloin	32%
Insects (crickets)	32%
Pork	29%
Pork chops	29%
Beef	26%
Red meat	22%
Powered proteins (e.g. lactoserum, hemp, etc.)	22%
Lamp	21%
Bacon	17%
Spirulina	17%
Animal-like plant products (e.g. Beyond Meat burger patty)	15%
Italian sausage	14%

+ 9

"Healthy" perception



	% VERY HEALTHY	(n=290)
Broccoli	82%	
Fish	74%	
Chicken	71%	
Grains and cereals (wheat, rice, barley, quinoa, etc.)	69%	
Legumes (peas, chick peas, lentils)	69%	
White meat	64%	
Turkey	58%	
Quebec pork	53%	
Pork tenderloin	50%	
Pork tenderloin	42%	
Tofu	40%	
Pork chops	36%	
Beef	35%	
Lamb	35%	
red meat	29%	
Insects (crickets)	21%	
Bacon	16%	
Spirulina	14%	
Italian sausage	13%	
Powdered proteins (e.g. lactoserum, hemp, etc.)	12%	
Meat-like plant products (e.g. Beyond Meat burger patty)	8%	

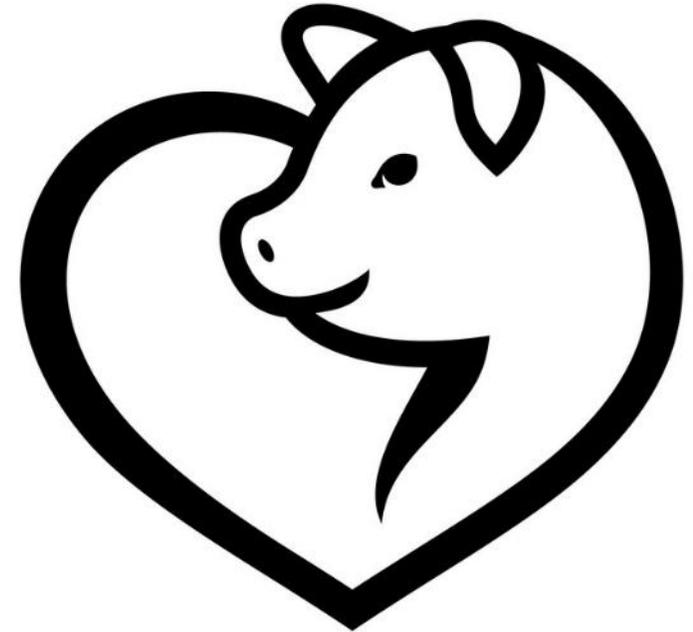
+ 8

+ 11

Possible actions to take

General advice

- Speak of PORK rather than MEAT
- Speak of QUEBEC PORK rather than PORK
- Speak of lofty cuts that are low in fat
- Highlight the taste and nutritional quality (protein, etc.)
- Avoid mentioning red meat



Producers

Rapport de responsabilité sociale :

**S'engager,
encore
plus loin.**



RESPONSABLES
PAR NATURE

Les Eleveurs
de porcs du Québec

Continue the PR momentum

(commitments, economic advantages, jobs, regions...)

Highlight product characteristics that are well perceived

(e.g. protein, local, taste, natural)

Continue to

- limit the ecological footprint
- improve animal well-being
- Communicating simply and vs other proteins



Manufacturers



Continue improving the offer (and let it be known)
E.g. ingredients.



Nature

Simple, known

Short words

Fresh

Designation (origin and cut)

Handcrafted (like at home)

Chemical

Complicated, unknown

Long words

Processed

No designation

Industrial / commercial

BUT WITH A MINIMUM OF \$ IMPACT!

Retailers

Capitalize on the uneven perception of taste/flavour of meat and its look.

Remind people that meat is “an excellent source of protein”

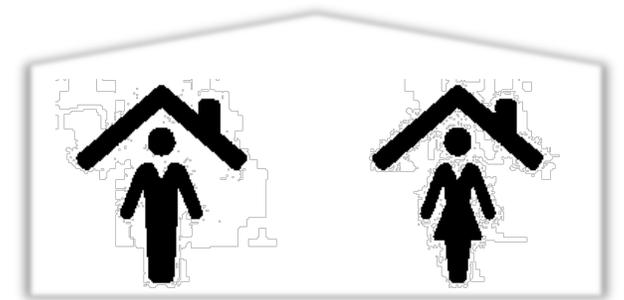
Promote buying locally → e.g. Quebec pork

Help to cook: reassure, inspire, simplify the work (e.g. Market 31)

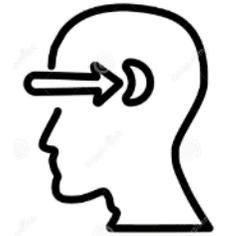


Retailers

- Segmented offer: millennials vs boomers; single households



- Take into account the specificities of human perception in your listing, pricing, promotion and planogram decisions.



Perception

- Test, measure, adjust, measure, implement... obtain

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Any questions?