



U.S. Soy Animal Agriculture Study

Results released September 25, 2023

Overview of Results

7 OUT OF 10



Consumers say animal diet is extremely or very important to their decision-making process

SOY-FED MEAT IS....



THE MOST PREFERRED ANIMAL FEED INGREDIENTS INCLUDE:



49%

Say knowing the animal was fed a vegetarian diet, including soybeans, was very or critically important

Executive Summary

Regular pork purchases are on the rise since 2019.

- 41% of US consumers purchase pork at least weekly, up from 37% in 2019.
- Among meat eaters, younger generations, especially Millennials, are the most likely to purchase meat multiple times a week. Three in 10 millennial meat consumers say they buy pork two to three times a week.

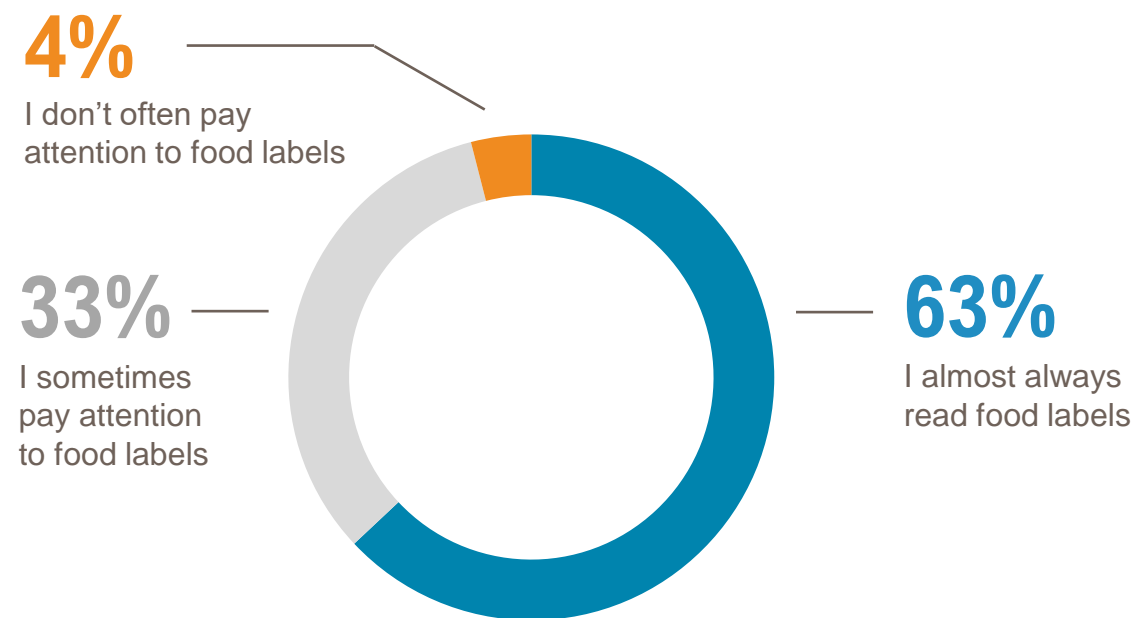
Consumers who prefer soy-fed meat believe it is healthier and of higher quality.

- Those who prefer soy-fed meat say it is healthier (45%), of higher quality (40%), more nutritious (39%), and better tasting (35%).
- Consumers are willing to pay significantly more for meat coming from animal that was raised humanely (42%) and born and bred in the US (41%). Over three in 10 consumers are willing to pay more if the animal was fed a nutritious diet (37%), or if the animal was fed a vegetarian diet including soybeans (35%).
- Consumers are looking for meat from animals fed a high-quality, nutritious diet (51%) and raised humanely (49%). Where the meat comes from is also a top concern (47%).

Executive Summary

Nearly all US consumers pay some attention to food labels.

- Knowing the animal was raised humanely and fed a nutritious diet are the leading food label for trustworthy meat brands.
- Younger generations show a higher interest in knowing the animal was fed a vegetarian diet including soybeans (29% Gen Z and Millennials).
- 43% are more likely to purchase meat if the labels indicate the animal was fed a vegetarian diet including soybeans.
- Consumers place a higher importance on antibiotic-free meat, or from animals not fed synthetic ingredients, than animals fed a vegetarian diet or soybeans.



Executive Summary

Consumers are concerned with where meat comes from, and older generations prioritize domestic meat.

- Consumers say knowing the animal was raised humanely and domestically, and fed a nutritious diet is critical to them. These attributes rank higher than sustainability and animal feed.
- The majority of consumers (88%) are more likely to purchase meat from animals born, bred and raised in the U.S.
- Consumers are concerned with where the meat comes from (47%).
- Older generations are looking for meat from domestically raised animals. 60% of Boomers and 50% of Gen X prioritize meat from animals raised and fed by US farmers.

Soy remains a top ingredient for animal feed.

- Seven in 10 say animal diet is extremely or very important to their decision-making process, up from 51% in 2019.
- Younger generations are more specific about their diet and value antibiotic-free meat. Gen Z and Millennials rank Antibiotic-free a top purchase driver for meat products (44% and 45% respectively). Gen Z are as likely to purchase meat if the label reads not fed synthetic ingredients (44%).
- Corn, wheat, and soybeans are the top ingredients consumers want to see in animal feed.
- There was a five percentage point increase for soybeans as the best animal feed ingredient, since 2021.

Methodology

U.S. Soy partnered with market research company, Reputation Leaders, to conduct a 10-minute online survey in May of 2023. The survey was conducted among a total of 2,028 Americans, 18 years old or older, who consume pork at least every couple of months.

The margin of error for the total sample of 2,028 is +/- 2.2% at the 95% level of confidence.

