

### About the Survey

FooDS tracks consumer preferences and sentiments on the safety, quality, and price of food at home and away from home with particular focus on meat demand. FooDS is a monthly on-line survey with a sample size of at least 1,000 individuals, weighted to match the US population in terms of age, gender, education and region of residence. See the [online technical document](#) for more details.

### MEAT DEMAND

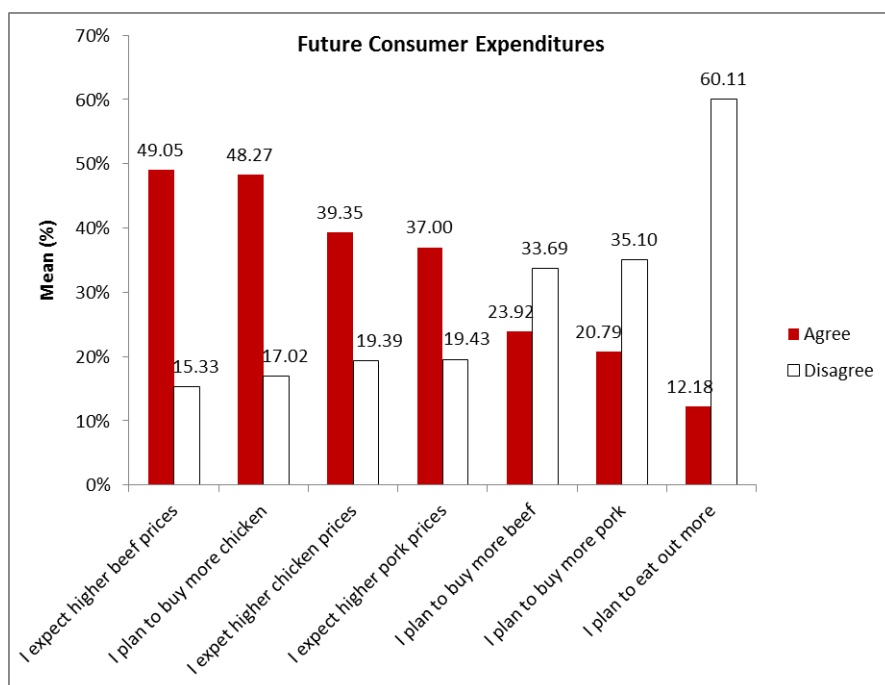
Willingness-to-Pay	Steak	Chicken Breast	Hamburger	Pork Chop	Deli Ham	Chicken Wing	Beans and Rice	Pasta
May 2013	\$7.03	\$5.03	\$4.21	\$3.91	\$2.28	\$2.07	\$1.92	\$1.86
June 2013	\$6.87	\$4.90	\$4.03	\$3.63	\$2.21	\$2.27	\$2.26	\$3.16
% change	-2.28%	-2.58%	-4.28%	-7.16%	-3.07%	9.66%	17.71%	69.89%

Coming off May, which included Memorial Day, willingness-to-pay (WTP) for most meat products fell in June, and WTP for less-valued meat (chicken wings) and non-meat foods increased.

### FOOD EXPENDITURES

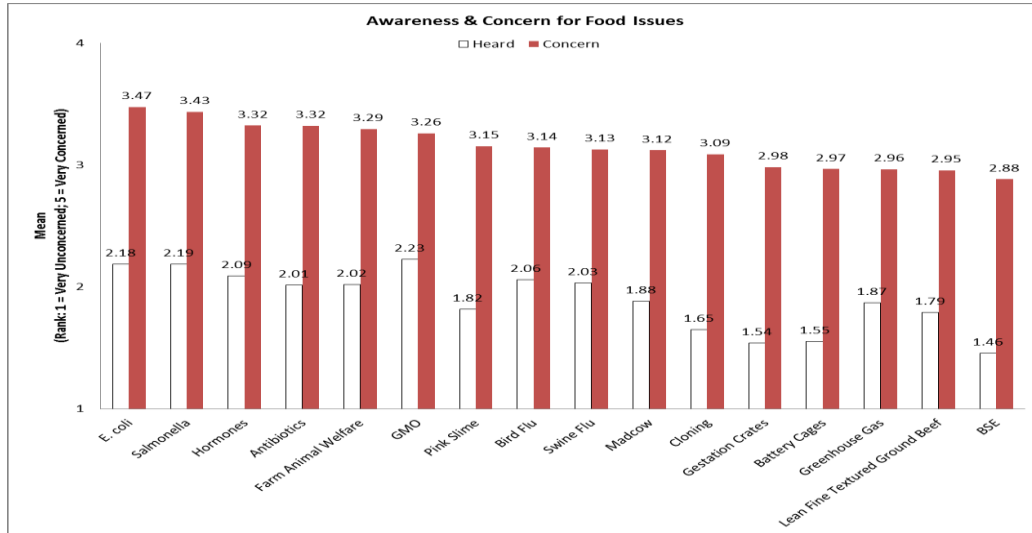
	Current weekly at home	Current weekly away from home	Anticipated change in at home in next 2 weeks	Anticipated change away from home in next 2 weeks
May 2013	\$92.37	\$45.54	-0.63%	-1.77%
June 2013	\$92.54	\$43.60	-0.60%	-2.13%
% change	0.18%	-4.26%	-4.76%	20.34%

In June, reported average food-grocery expenditures were \$92.54, up 0.18% from May, while an average of \$43.60 was spent on food consumed away from home per week, down 4.26% from a month ago. Consumers anticipate spending less money on food purchased for at home consumption, but the expected decline is 4.76% lower than last month; the anticipated fall in away from home food expenditures grew by 20.34% in June. Consumers expect to continue to see a rise in meat prices, especially those of beef cuts.



## AWARENESS & CONCERN TRACKING

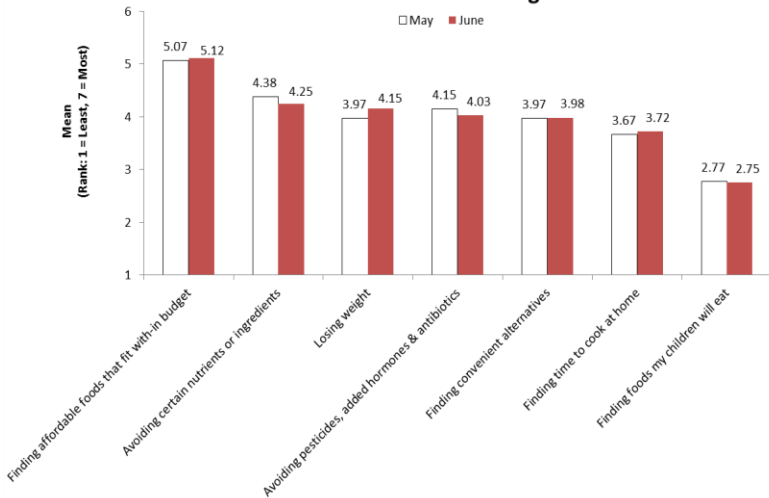
Consumer's concerns and values were similar in comparison to May. *E. coli*, Salmonella and the use of growth hormones in livestock were again consumer's top three concerns when purchasing food. GMO's, Salmonella and *E. coli* were reported to be the most discussed in the news over the last two weeks. While awareness news reports of GMO's increased by 3.22%, reports of Bird Flu declined by 9.49%. In the last month, just over 5% of participants reported having food poisoning, virtually unchanged from a month ago.



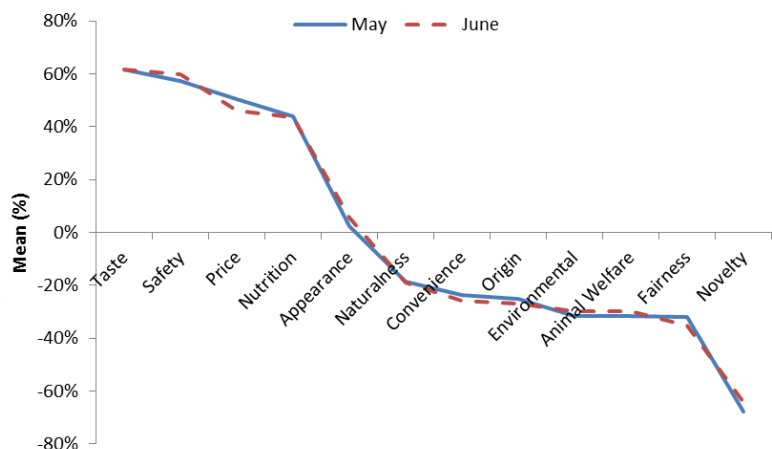
## GENERAL FOOD VALUES

Consumer values remained similar to those in May, with a slight increase in perceived value of safety. Taste, safety and price remained most important to consumers when purchasing food. Again, consumers reported that their main challenge faced this month was finding affordable foods to fit within their budget. Finding the time to cook at home and finding food their children will eat were ranked last, just as in the previous month.

### Consumer Challenges



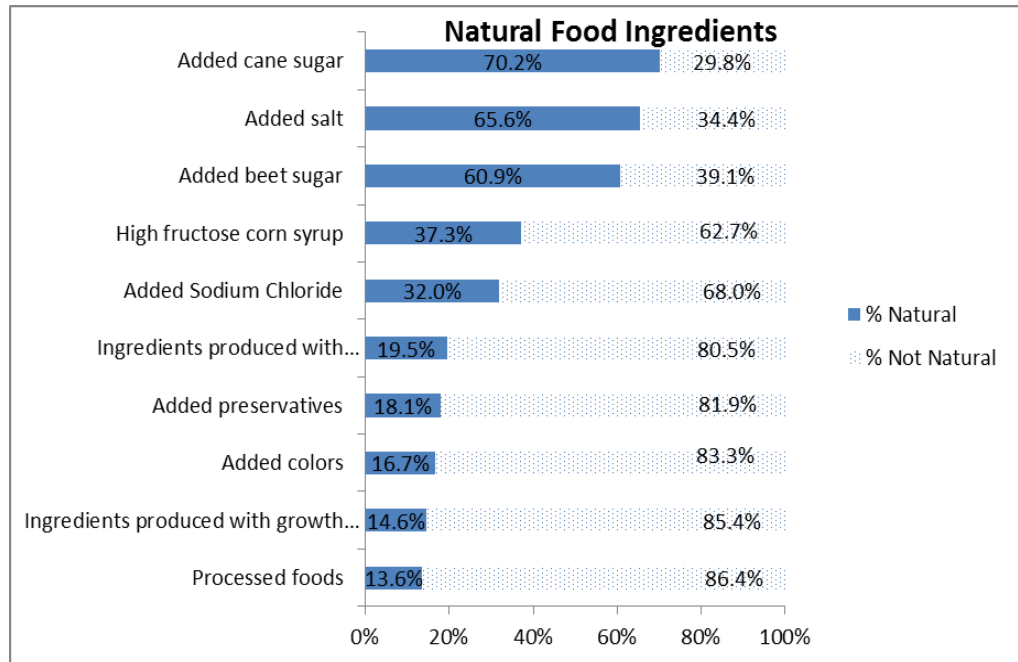
### Consumer Values



**NATURAL FOODS**

Two new questions were added to the survey in June. Consumers were asked to report their beliefs about what foods or ingredients are “natural”. A majority of consumers believe that beet sugar, salt and cane sugar are “natural” ingredients.

Consumers also reported that sodium chloride was not a natural food; however, salt and sodium chloride, are in fact, the same. More than 80% of consumers indicated natural foods are not processed, produced with growth hormones, have added color or produced with biotechnology.



Over half of the participants reported their definition of natural as “foods with no added ingredients and no processing”.

