US Meat Export Sentiment - Methodology

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Survey Methodology Overview

In January 2020, Kansas State University (KSU) in collaboration with the North American Meat Institute (NAMI) initiated a new project focused on the sentiment of U.S. meat exporters. This project reflects the observed need for additional meat export focused information, recognition of successful sentiment indices elsewhere, and initial funding support by USDA.[1]

On a quarterly basis, NAMI distributes an email invitation to its members requesting they complete a survey designed at KSU. This short survey aims to discern sentiments on the status of U.S. meat exports. The base survey questions asked each offering are included at the end of this document. The convenience survey will have a varying number of completed responses each offering reflecting distribution to packers, processors, and distributors who are NAMI members.

Sentiment Indices

The first step in deriving the *US Meat Export Overall Sentiment Index* is to calculate the relative scores of four different questions. This includes two current situation (*Current Strength* and *Current US*) and two future situation (*Future Strength* and *Future US*) questions. Considering each question individually, a value of 100 is added to the percentage of favorable responses minus the percentage of unfavorable responses. This results in each question having a potential sentiment range from zero (100 plus 0 percentage points favorable less 100 percentage points unfavorable) to 200 (100 plus 100 percentage points favorable less 0 percentage points unfavorable). The resulting four sentiment scores are then averaged providing that month's overall *US Meat Export Overall Sentiment Index* score. Similarly, averaging the two current situation scores provides a *Current US Meat Export Sentiment Index* score and averaging the two future situation scores provides a *Future US Meat Export Sentiment Index* score.

Survey Instrument (*Variable Names in Italics and Purple Text*)

We are primarily interested in your views regarding U.S. meat exports.

Throughout the survey, we ask about total value of exports (quantity times price) and present questions specific to your primary, largest exported meat species.

Which of the following best describes your business? {*Business Type*}

○ Packer/Processor

○ Packer

○ Processor

○ Distributor

○ Other

Which of the following meat products (and their by-products) is the <u>primary, largest total value</u> source of your <u>export</u> business (across all U.S. locations and operations)? {*Largest Meat*}

○ Beef

○ Pork

○ Chicken

○ Turkey

○ Lamb

○ Other

Approximately what share of your <u>total business</u> (across all U.S. locations and operations) is from ${Largest_Meat/ChoiceGroup/SelectedChoices} exports? {*Share By Meat*}

○ None (0%)

○ 1-10%

○ 11-20%

○ 21-30%

○ 31-40%

○ 41-50%

○ Over 50%

What change do you anticipate in your company's total value of ${Largest_Meat/ChoiceGroup/SelectedChoices} exports over the next 12 months (relative to the past 12 months)? {*Future Share*}

○ Decline over 20%

○ Decline 11-20%

○ Decline 1-10%

○ Small Change

○ Increase 1-10%

○ Increase 11-20%

○ Increase over 20%

Would you say that currently ${Largest_Meat/ChoiceGroup/SelectedChoices} exports for your company are stronger, the same, or weaker <u>than 1 year ago</u>? {*Current Strength*}

○ Stronger

○ The Same

○ Weaker

Looking ahead, do you think <u>1 year from now</u>, ${Largest_Meat/ChoiceGroup/SelectedChoices} exports for your company will be stronger, the same, or weaker? {*Future Strength*}

○ Stronger

○ The Same

○ Weaker

Considering the broader, U.S. ${Largest_Meat/ChoiceGroup/SelectedChoices} industry, do you think <u>now</u> is a good, okay, or bad time for exports? {*Current US*}

○ Good Time

○ Okay Time

○ Bad Time

Still considering the broader, U.S. ${Largest_Meat/ChoiceGroup/SelectedChoices} industry, what do you think will happen to exports over the <u>next 12 months</u>? {*Future US*}

○ Increase

○ Remain the Same

○ Decrease

Which <u>country</u> do you anticipate will <u>most increase</u> U.S. imports of ${Largest_Meat/ChoiceGroup/SelectedChoices}, over the <u>next 12 months</u> relative to now? {*Country Future*}

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Please indicate 4 of the following factors that currently are MOST SUPPORTING and 4 that are MOST RESTRICTING U.S. ${Largest_Meat/ChoiceGroup/SelectedChoices} exports? {*Export Factors*}

MOST SUPPORTING (Drag 4 Items Here)	MOST RESTRICTING (Drag 4 Items Here)
_____ Production Volume in the U.S.	_____ Production Volume in the U.S.
_____ Production Volume in Competing Exporting Countries	_____ Production Volume in Competing Exporting Countries
_____ U.S. Dollar Exchange Rate	_____ U.S. Dollar Exchange Rate
_____ Foreign Market Access, Tariff-Rates, and Quotas on Exported Products	_____ Foreign Market Access, Tariff-Rates, and Quotas on Exported Products
_____ Prices in the U.S.	_____ Prices in the U.S.
_____ Prices in Competing Exporting Countries	_____ Prices in Competing Exporting Countries
_____ Regulation in the U.S.	_____ Regulation in the U.S.
_____ Regulation in Competing Exporting Countries	_____ Regulation in Competing Exporting Countries
_____ Production Practice Requests/Requirements of Candidate Importers	_____ Production Practice Requests/Requirements of Candidate Importers
_____ Cold Storage Stocks in the U.S.	_____ Cold Storage Stocks in the U.S.
_____ Animal Disease Issues	_____ Animal Disease Issues
_____ Income Growth in International Markets	_____ Income Growth in International Markets