

THE UNITED KINGDOM RED MEAT MARKET

Products, Claims and Attributes

February 2018

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KEY LESSONS

ASSESSED THE CURRENT UNITED KINGDOM RED MEAT LANDSCAPE

Two studies were conducted

- Over 8 days in February 2018
- 4,000 respondents; and
- 245 unique products

to explore United Kingdom (UK) consumer receptiveness to attribute certification, and preference for different products and positioning.

- Around **50%** of consumers site the presence of a Quality Assurances (QA) logo as important to their meat-buying decisions, and **25%** are familiar with the UK's Red Tractor QA logo.
- Most consumers are more willing to pay for 100% British meat, but higher-value consumers are more interested in grass-fed and GMO-free product.
- *The most popular beef products are* roasting joints and steaks with high-quality raising claims e.g. grass-fed.
- The highest value lamb segment is consumers who purchase every week, and prefer grass fed product attributes (average total weekly retail spend of £79 per person).
- Consumers prefer marketing that includes imagery of cooked, ready to eat product over pastoral or uncooked meat imagery.

UK Red Meat Market Scan

ARTICULATING THE LANDSCAPE



THREE STEPS WERE TAKEN TO SHOW THE 'LAY OF THE LAND'

1

Measuring product performance

by collecting data from UK supermarkets about different Beef & Lamb product attributes to isolate product category leaders

UK Supermarket Data Collection

160 Beef Products

85 Lamb Products

13 – 16 Feb, 2018

Data Fields include: Price, Rating, Weight, Reviews, Images, Claims, Origin, Descriptions

2

Quantifying consumer familiarity

with different industry QA logos, and receptiveness to different advertising

Targeted United Kingdom Survey

13 – 16 Feb, 2018

Respondents: 1,500

3

Assessing spending patterns

in relation to product attributes

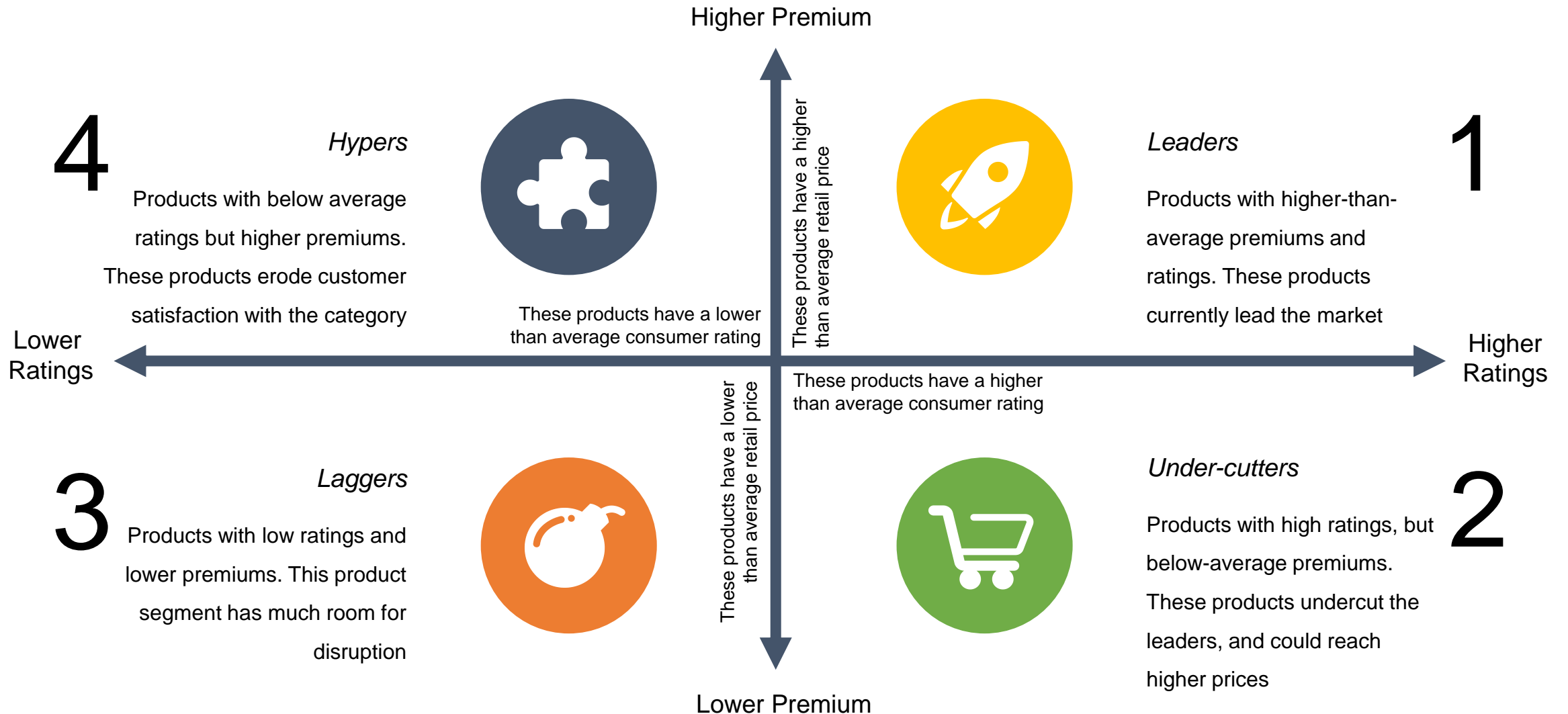
Targeted United Kingdom Survey

13 – 16 Feb, 2018

Respondents: 1,500

ARTICULATING PRODUCT PERFORMANCE

The Framework

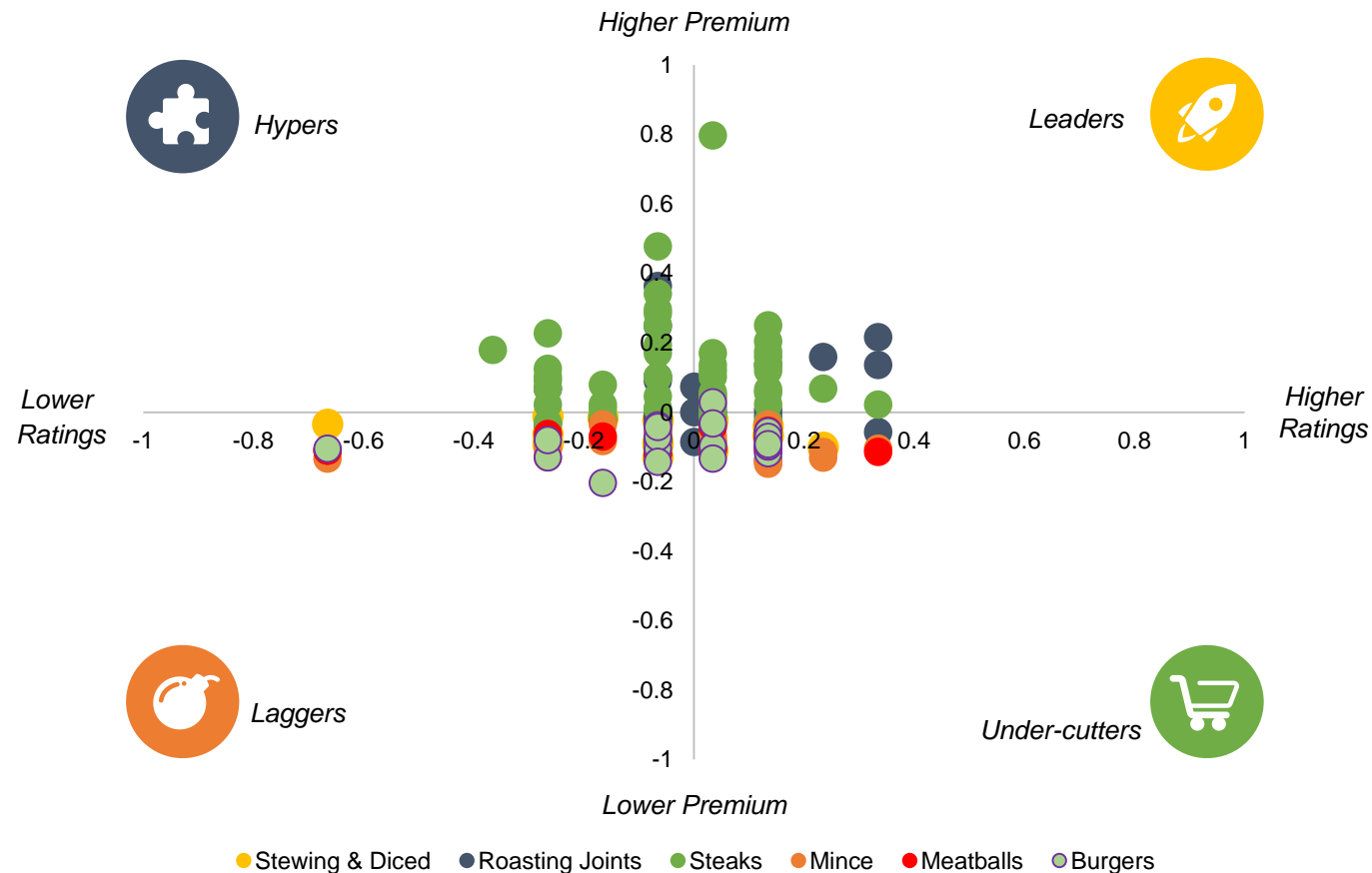


MEASURING PRODUCT PERFORMANCE

Beef Cuts

UK Beef Products By Price Premium And Review

February 2018



- Price and rating data collected from Waitrose and Ocado online supermarkets.
- Data is averaged across the UK market. Prices in specific cities may vary.
- Only two product types achieve premiums: Roasting Joints, and Steaks. These leaders are positioned with high-quality raising claims such as grass-fed.

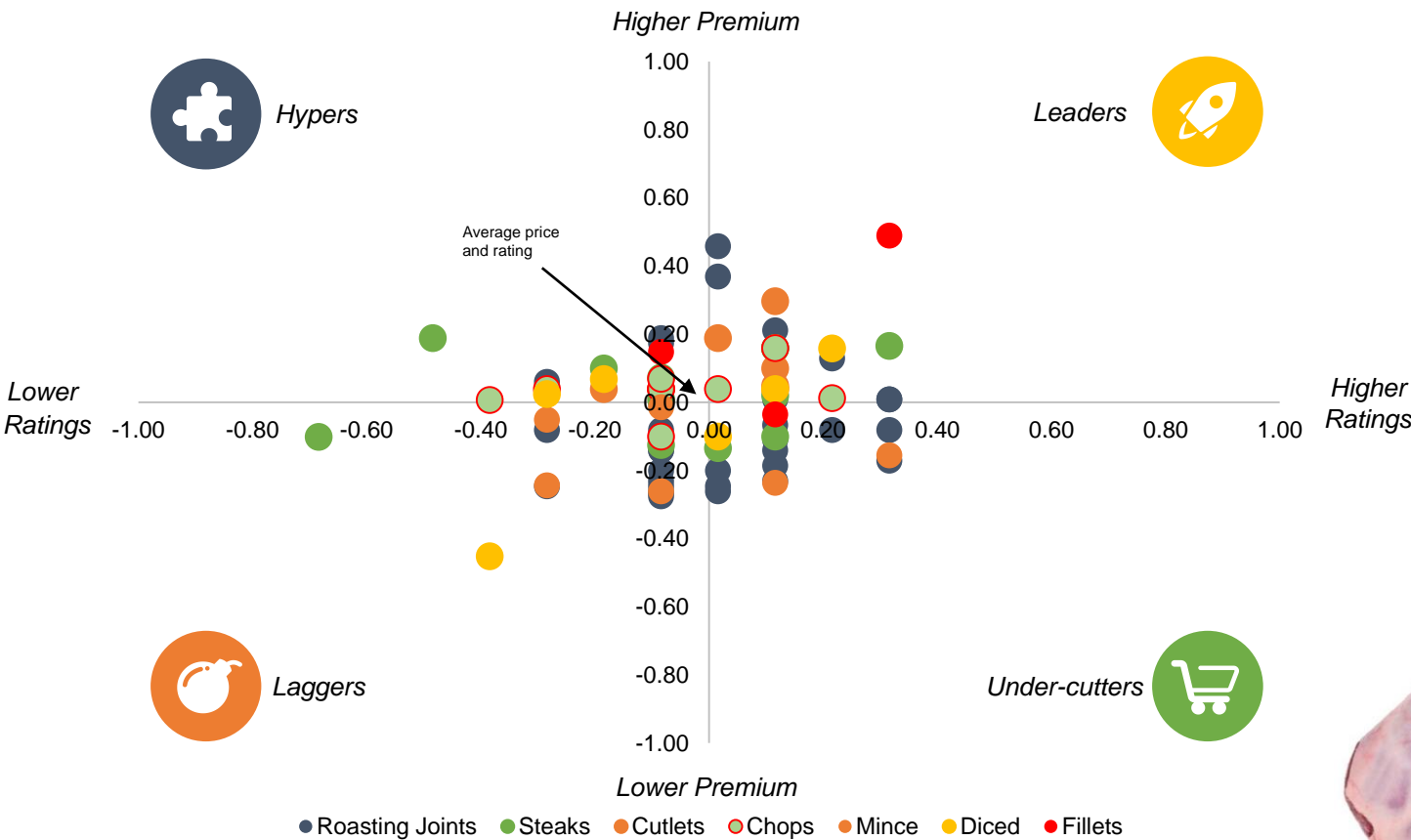
HIGH PERFORMING PRODUCTS



MEASURING PRODUCT PERFORMANCE

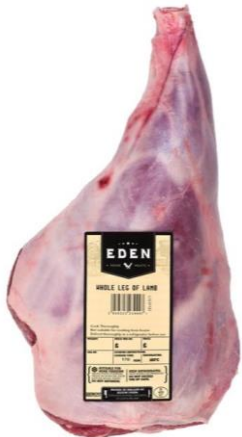
Lamb Cuts

UK Lamb Products By Price Premium And Review
February 2018




- Data collection and methods are the same as the beef category.
- Steaks and Roasting Joints are the most popular but have high variation in premiums and ratings. This is consistent across all price and ratings data in this category, showing there is high variability in consumer perceptions of value and quality.
- There is some preference for leaner, easier to manage cuts such as fillets.
- Data shows that consumers are willing to pay more for products with the right attributes. Also, products with rosemary have better premiums and ratings.

HIGH PERFORMING PRODUCTS



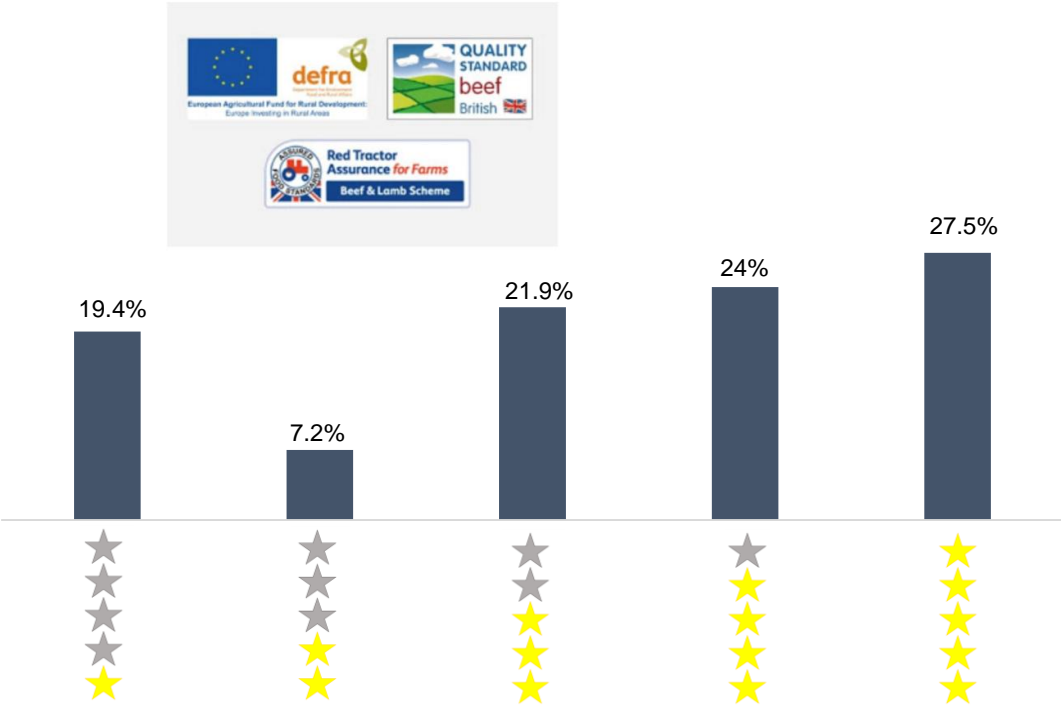
MEASURING PRODUCT PERFORMANCE

A Comparison

Beef		
	Price (£)	Average Consumer Rating
 Leaders	Roasting Joints	19.21 3.33
	Steaks	27.63 3.23
	Diced	12.64 3.13
	Mince	10.03 3.50
	Meatballs	10.21 3.59
	Burgers & Meatloaf	10.28 3.34

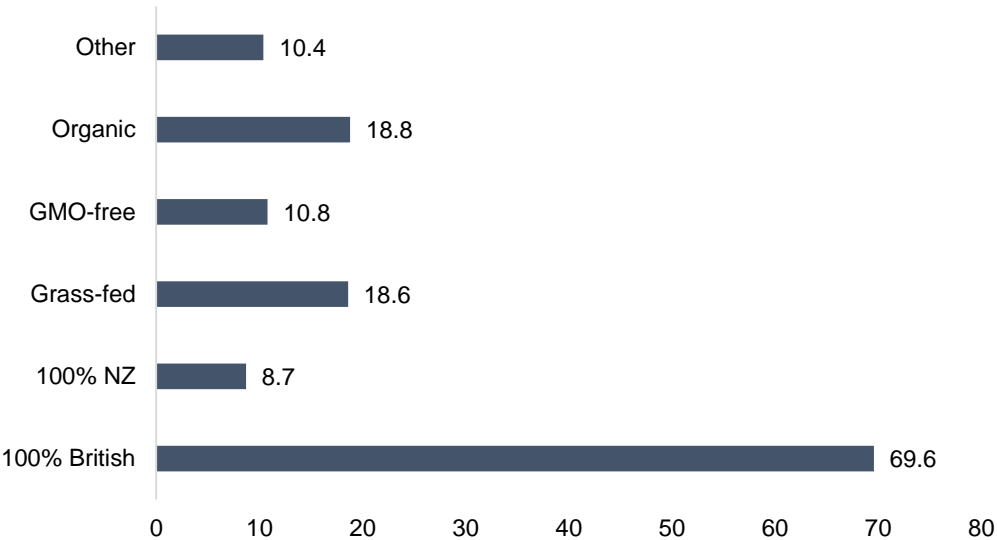
Lamb		
	Price (£)	Average Consumer Rating
	Roasting Joints	14.78 3.53
	Steaks	18.14 3.38
 Leaders	Fillet	23.38 4.00
	Cutlets	20.26 3.57
	Chops	17.81 3.06
	Diced	15.23 3.00
	Mince	11.35 3.17

When deciding which meat to buy, how important are quality labels such as the ones shown?



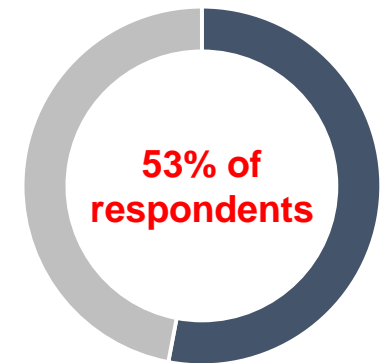
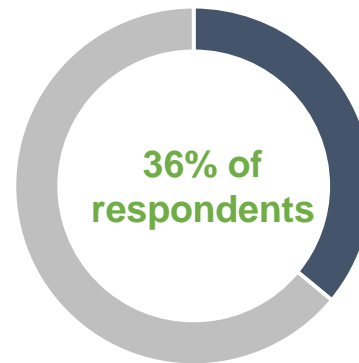
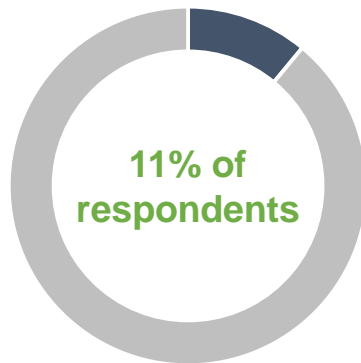
- Around **50% of consumers** site the presence of QA stamps as important to their meat-buying decisions.
- Overall, consumers are not very familiar with national QA labels. For UK consumers **around 25%** are familiar with the UK's domestic QA logo.

When buying red meat which of the following attributes are you more willing to pay for?

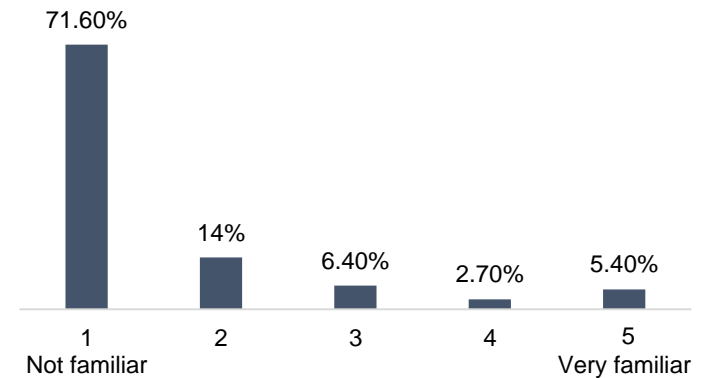
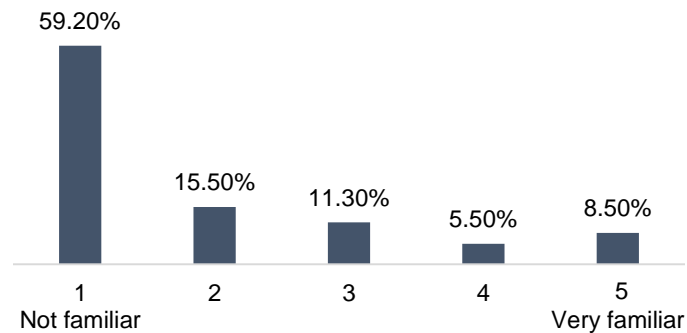
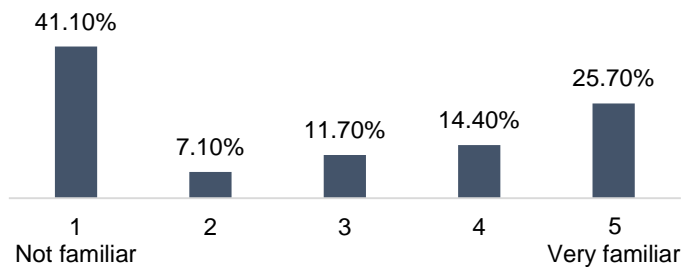


- Most consumers are more willing to pay for 100% British meat, but higher-value consumers are more interested in grass-fed and GMO-free product.

Which of these advertisements would most encourage you to buy beef?



How familiar are you with each of these quality assurance logos?



ASSESSING SPENDING PATTERNS vs. Product Attributes

Beef

When buying red meat which of the following attributes are you more willing to pay for?

		100% New Zealand	100% British	Certified Organic	Grass-Fed	GMO-Free
How often do you buy at the supermarket?	Every week	44	42	42	40	43
	Once a month	30	39	41	42	43
	A few times a year	37	36	40	39	47
	Once a year	33	45	61	61	99
	Never	54	43	45	57	51

Numbers of respondents

Lamb

When buying red meat which of the following attributes are you more willing to pay for?

		100% New Zealand	100% British	Certified Organic	Grass-Fed	GMO-Free
How often do you buy at the supermarket?	Every week	38	44	46	78	51
	Once a month	38	41	48	43	47
	A few times a year	38	37	43	42	48
	Once a year	22	37	39	38	23
	Never	49	42	41	41	48

Numbers of respondents

Appendix

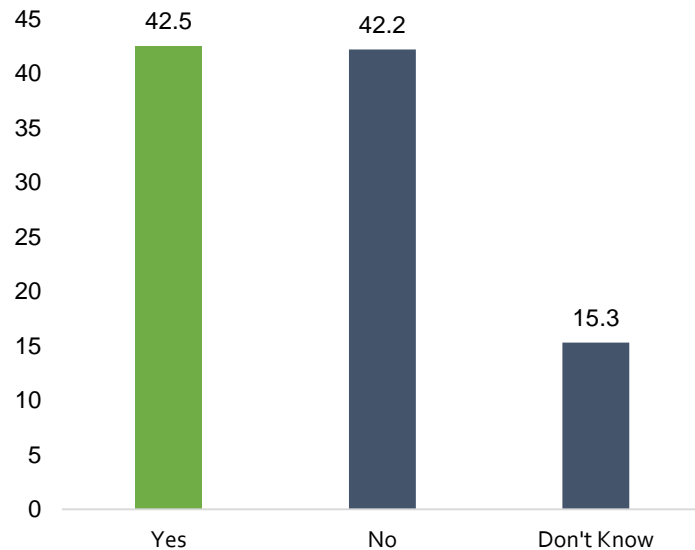
DETAILED CHARTS



Detailed Responses

QUESTION 1:

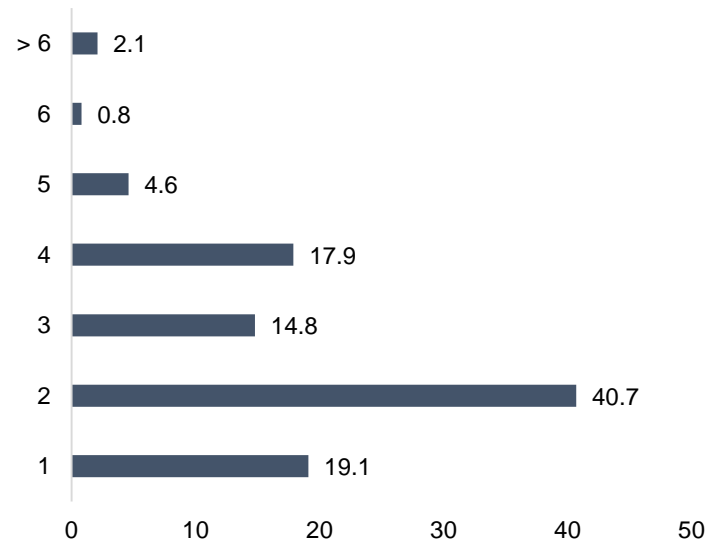
Are you the person who primarily buys groceries in your house?



Only respondents who answered 'yes' were screened in to the rest of the survey.

QUESTION 2:

How many people do you usually buy groceries for each week?



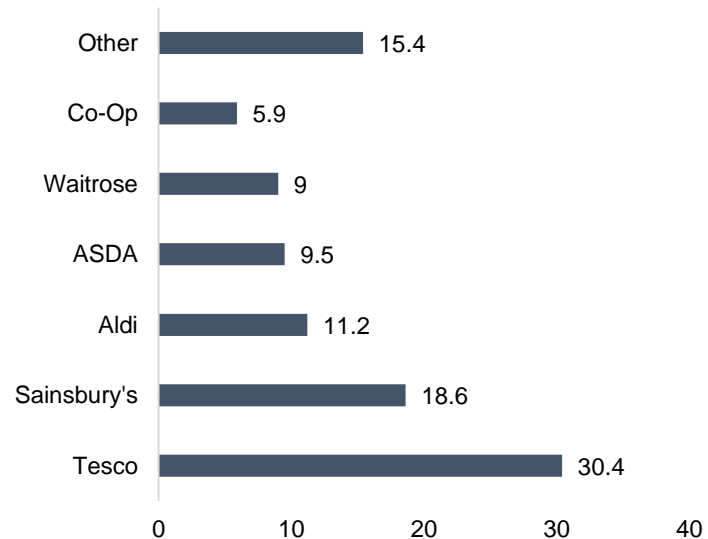
QUESTION 3:

How much do you usually spend on groceries each week?

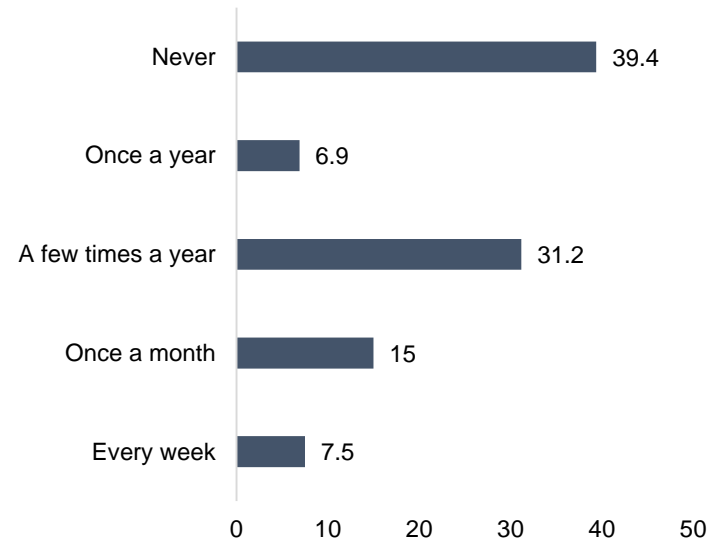


Detailed Responses

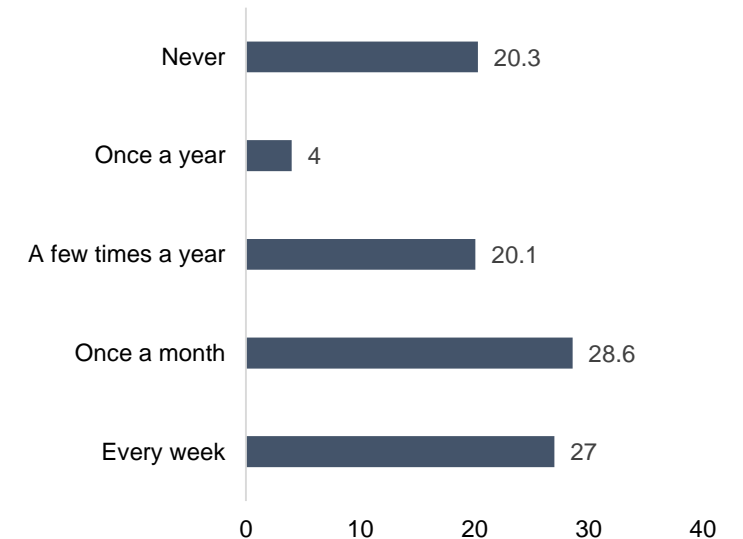
QUESTION 4:
Which supermarket do you most often shop at?



QUESTION 5:
How often do you buy lamb at the supermarket?



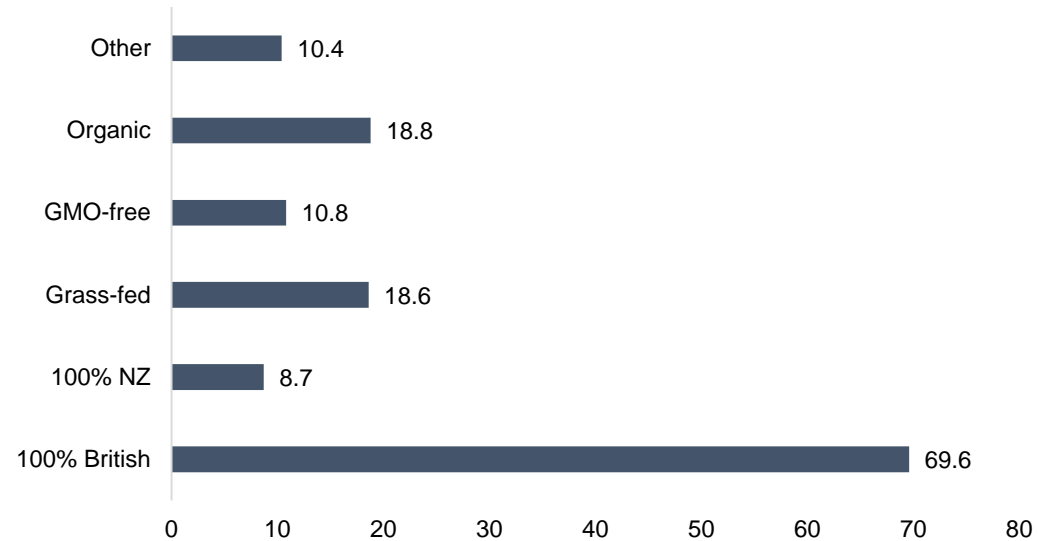
QUESTION 6:
How often do you buy beef at the supermarket?



Detailed Responses

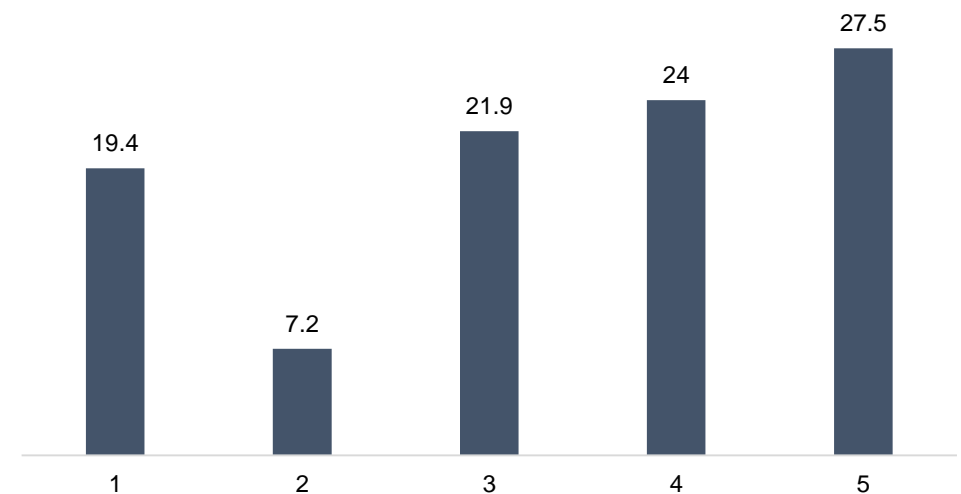
QUESTION 7:

When buying red meat which of the following attributes are you more willing to pay for?

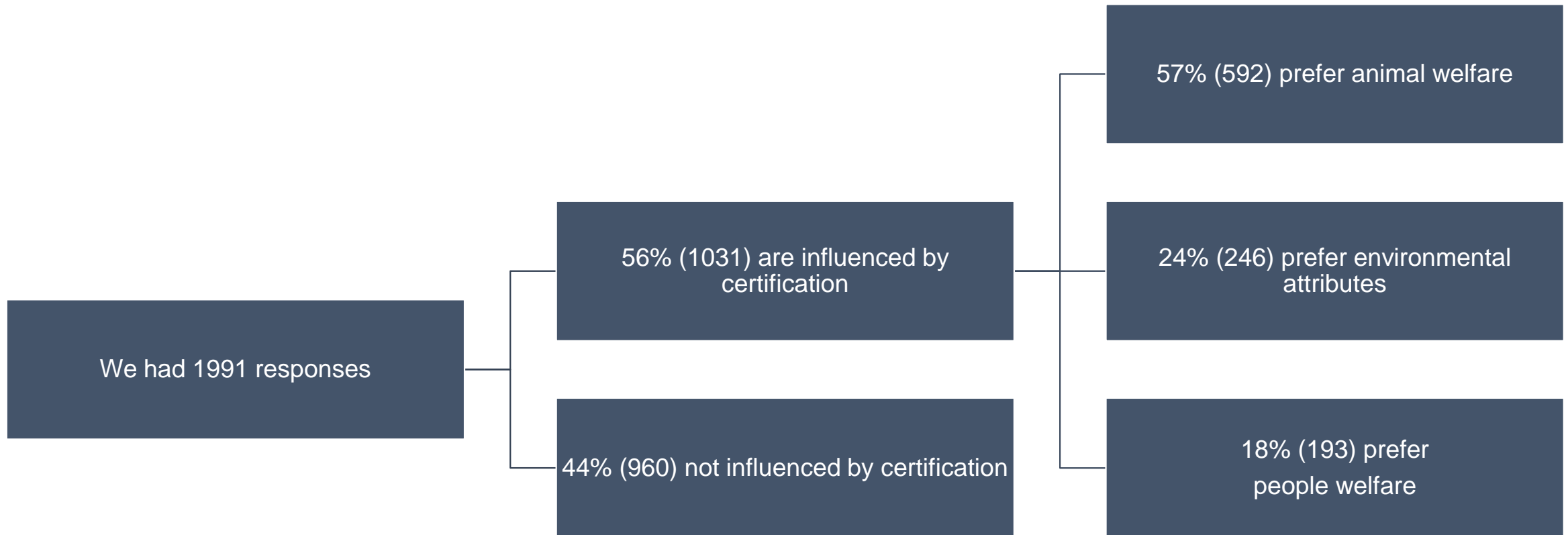


QUESTION 8:

When deciding what meat to buy, how important are quality labels such as the ones shown?



Detailed Responses



Influenced by certification
(1031, 56%)

Count of ‘most preferred’ attributes per group

Total Results		18 - 24		25 – 34		35 - 44		45 – 54		55 – 64		65+	
		Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Animal Welfare	522	24	37	35	43	45	43	71	54	41	52	52	25
Environmental	215	16	19	19	22	34	15	19	9	26	10	17	9
Community	164	7	11	18	11	26	18	16	9	19	10	12	7

Animal Welfare Breakdown

Animal Welfare Primary
(592, 57%)

Count of 'most preferred' attributes per group

		18-24		25-34		35-44		45-54		55-64		65+		Unknown			Grand Total
Most important animal welfare attribute		Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Unknown	
Animal health & wellbeing	65%	26	9	30	20	31	25	35	49	33	26	17	38	2	3	40	384
Free range	22%	7	10	6	7	6	14	13	14	13	9	6	9		2	15	131
High quality feed & water	6%	2	1	4	4	2	3	3	5	4	1		3			4	36
None of the above	4%	2	2	2	3	3	3	2			4		1	2			24
Adequate shelter	2%		1	1	1			1	3	2	1	1	1			1	13
All of the above	0%		1									1					2
Vegan	0%															1	1
all of the above most humane slaughter	0%					1											1
Grand Total		37	24	43	35	43	45	54	71	52	41	25	52	4	5	61	592

Environment Breakdown

Environment Primary
(246, 24%)

Count of ‘most preferred’ attributes per group

		18-24		25-34		35-44		45-54		55-64		65+		Unknown			Grand Total
Most important environment attribute		Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Unknown	
all of the above	0%										1		1				1
Biodiversity & landscape values	13%		1	2	2	4	2		2	2	3	2	5		1	6	32
Energy efficiency & carbon emissions	30%	8	6	11	7		16	3	7	3	4	3	1	1		5	75
None of the above	7%	1	1		4	2	1	2	1	1	4					1	18
Soil care	7%		1	1	2	2	1	1	1	1	2	1	3			1	17
Waste management	31%	10	3	7	2	4	11	3	6	3	10	1	5	1		10	76
Water management	11%		4	1	1	3	3		2		2	2	2	1		5	26
Grand Total	100%	19	16	22	18	15	34	9	19	10	26	9	17	3	1	28	246

Community Welfare Breakdown

People Welfare Primary
(193, 18%)

Count of 'most preferred' attributes per group

		18-24		25-34		35-44		45-54		55-64		65+		Unknown			Grand Total
Most important people welfare attribute		Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Unknown	
Education in the community	10%	2		1	2	4	1	1		3	1			1	1	3	20
Employment in the community	24%	1	3	3	4	7	7	2	4	2	2	3	3	1	1	4	47
Engagement with the community	9%	1	1	1	2		5	1	1		4		1				17
None of the above	7%	1	1		2	1	1		2	1	1		1			3	14
population stability so they don't move and destabilise others	1%										1						1
Public health in the community	17%	3		2	4	1	7	1	2	1	3	2	1			6	33
Worker health and safety in the community	32%	3	2	4	5	5	5	4	7	3	7	2	6	1		7	61
Grand Total	100%	11	7	11	19	18	26	9	16	10	19	7	12	3	2	23	193

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