

## Unprocessed Poultry and Red Meat - UK - October 2016

Report Price: £1995.00 | \$3230.80 | €2534.27

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“With cost rises looming on the horizon, there is a pressing need for retailers to move their communication beyond price. Highlighting their credentials in terms of farmer relations or responsible antibiotic use offers a promising means for companies to distinguish their offering from rivals’ given the strong consumer interest.”

– Alice Baker, Research Analyst

This report looks at the following areas:

- Farmers’ pay guarantees offer a promising means to appeal to shoppers
- Cooking guidance should help to expand buyers’ limited repertoires
- Offering reassurance on antibiotics can boost companies’ standing

Estimated at £6.6 billion in 2016, the unprocessed red meat, poultry and game retail market grew by 5.3% over 2011-16, fuelled by price inflation in 2011-13. Overall market value fell by 2% year on year in 2015 and is estimated to fall by 1% in 2016 due to weak wholesale prices, translated to retail by the supermarket price wars. All segments are expected to see price inflation in 2016-21 due to the weakened pound, with the result that overall market values are predicted to rise by 13% to reach £7.5 billion by 2021.

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### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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### Issues and Insights

Farmers' pay guarantees offer a promising means to appeal to shoppers

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The facts  
The implications  
Cooking guidance should help to expand buyers' limited repertoires  
The facts  
The implications  
Offering reassurance on antibiotics can boost companies' standing  
The facts  
The implications

## The Market – What You Need to Know

Falling prices bring down market value 2014-16  
Inflation and income trends to affect the market 2016-21  
Diverse factors govern segment performance  
Mixed fortunes for red meat in 2016  
Poultry remains in volume growth and game continues strong growth from a low base  
'Flexitarian' trend opens possibilities for other proteins  
Health concerns affect red meat

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Poultry

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Poultry sales remain in growth as shoppers retain savvy spending habits

Poultry's low price should help volume and value sales growth 2016-21

Game

Increased distribution helps game to grow 2011-16

Game expected to see further growth 2016-21, but this will slow

Offal

Lack of consumer interest hinders offal

Offal values to be pushed up by inflation despite static volume sales

## Market Drivers

Weak wholesale meat and poultry prices pull down retail prices

Supermarkets step up their price war

Weakened pound could lead to price inflation

Brexit vote raises multiple uncertainties

Economic slowdown could lead to cutbacks or switching

Figure 11: Retail price index for meat and poultry, by segment, and comparison with total food, 2011-16

Many complex issues to resolve

'Flexitarian' trend has implications for volume sales

UN panel advocates tax on meat to preserve environment

Health concerns affect red meat

Antibiotic use comes under closer government scrutiny

## Companies and Brands – What You Need to Know

Retailers build up their premium ranges

Waitrose launches Omega 3 enriched chicken, Tesco promotes twin-packs

Supermarkets dominate advertising

Discount supermarkets focus on provenance and ethics

Morrisons highlights in-store preparation and appeals to emotions

## Launch Activity and Innovation

Further growth in roast-in-the-bag chickens

Appealing to the ethically-conscious through animal welfare claims

Opportunity for roast-in-the-bag game birds

Supermarkets build up their premium ranges

Discounters look to exotic and unusual meats

Exploring provenance through reference to animal breeds

Rise in low-fat claims

Waitrose looks to tap into interest in Omega 3 with enriched chicken

Tesco introduces Farm brands

Tesco promotes chicken twin-packs as cutting down on food waste

## Advertising and Marketing Activity

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Supermarkets dominate advertising

Discount supermarkets put the focus on provenance

Aldi uses humour to underline its ethical sourcing

Lidl focuses on farms

Figure 12: Total above-the line, online display and direct mail advertising expenditure on red meat, poultry and game, by top advertisers, 2012-16\*

Morrisons highlights its in-store meat preparation

Building emotional associations around meat through reference to family meals

Trade bodies look to attract younger consumers to lamb

AHDB reprises mini roast campaign

AHDB and HCC push family farms angle to encourage buying British

AHDB prompts Britons to support lamb farmers

HCC looks to push awareness of Welsh pork producers

Nielsen Ad Intel coverage

## The Consumer – What You Need to Know

Chicken's lower price allows it more frequent usage than beef

Beef no longer the principal choice for weekend meals

A price-driven market, encouraged by supermarket tactics

Scope to move the discussion beyond price among a significant minority

Cooking guidance should help to expand buyers' limited repertoires

Future direction of the economy crucial for future sales

Farmers' pay guarantees offer a promising means to appeal to shoppers

Reassurance on antibiotics could help companies to bolster their reputation with consumers

## Usage of Unprocessed Meat, Poultry and Game

Usage of meat, poultry and game higher among men than women

Chicken is the most regularly eaten type

Figure 13: Usage of unprocessed meat, poultry and game, by type, August 2016

Beef is the second most eaten meat, but lags far behind chicken on frequency

Figure 14: Usage frequency for unprocessed meat, poultry and game, by type, August 2016

Over-55s are the most likely to eat lamb

Game attracts a young urban customer base

Game should benefit from the expansion in processed products

Turkey and duck face a number of usage barriers

## Usage Occasions for Selected Types of Meat, Poultry and Game

Beef no longer the first choice for Sunday lunch

Figure 15: Usage occasions for selected types of meat, poultry and game, August 2016

Pork chosen for everyday meals but not for special occasions

One third would cook lamb for a weekday meal

Unprocessed meat loses out to processed for outdoor meals

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## Meat, Poultry and Game Buying Factors

- Consumers' price focus encouraged by retailer tactics
- Scope to move the discussion away from price among a large minority  
Figure 16: Meat, poultry and game buying factors, August 2016
- Focus on familiar meats limits buying repertoires
- Cooking advice could help to boost sales of less familiar meat cuts
- Further work needed to persuade consumers on value of animal breeds and diets

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- Future direction of the economy crucial for meat sales  
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- Poultry and game could benefit from health concerns around red meat

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- Interest in farmers' pay guarantees should be a boost to small family farms
- Opportunities for further expansion in charity tie-ups
- Need to make charity connections more tangible
- Unnecessary antibiotic use of concern to many
- 'No antibiotic' labels likely to resonate

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- Consumer research methodology

## Appendix – Market Size and Forecast

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Forecast Methodology

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