

July 2021

European Meat Shopper Insight Tracker

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Meat Shopper Insight

- Understanding protein dynamics and meat shopper behaviour
- Supporting your category management
- N=375 grocery shoppers per market monthly
- Comparing May-June to same period in 2020



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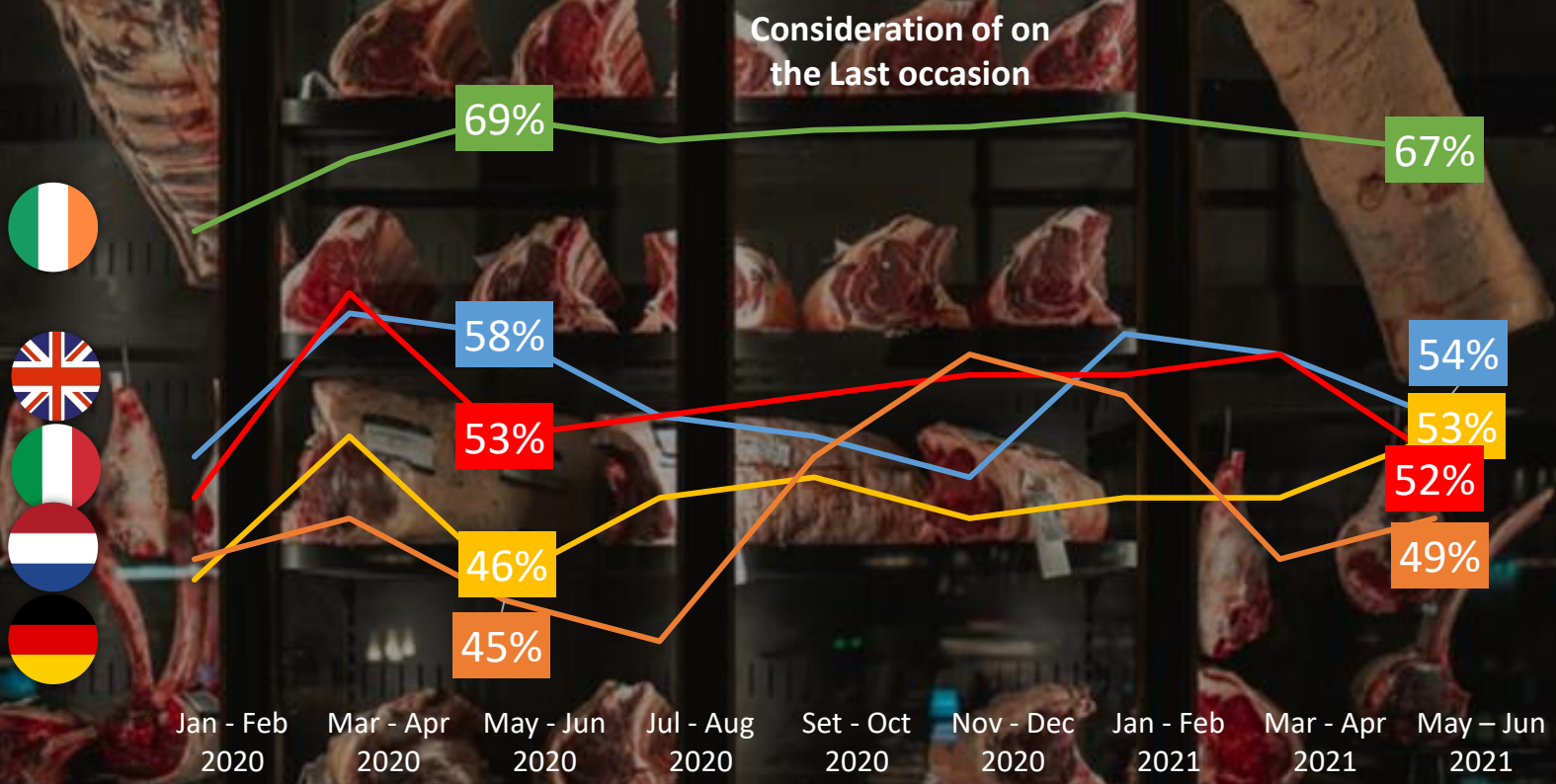
1.

Despite return of foodservice, beef consideration & purchase levels steady

Despite fluctuation throughout the year, beef consideration relatively stable - improvements in Germany and Netherlands



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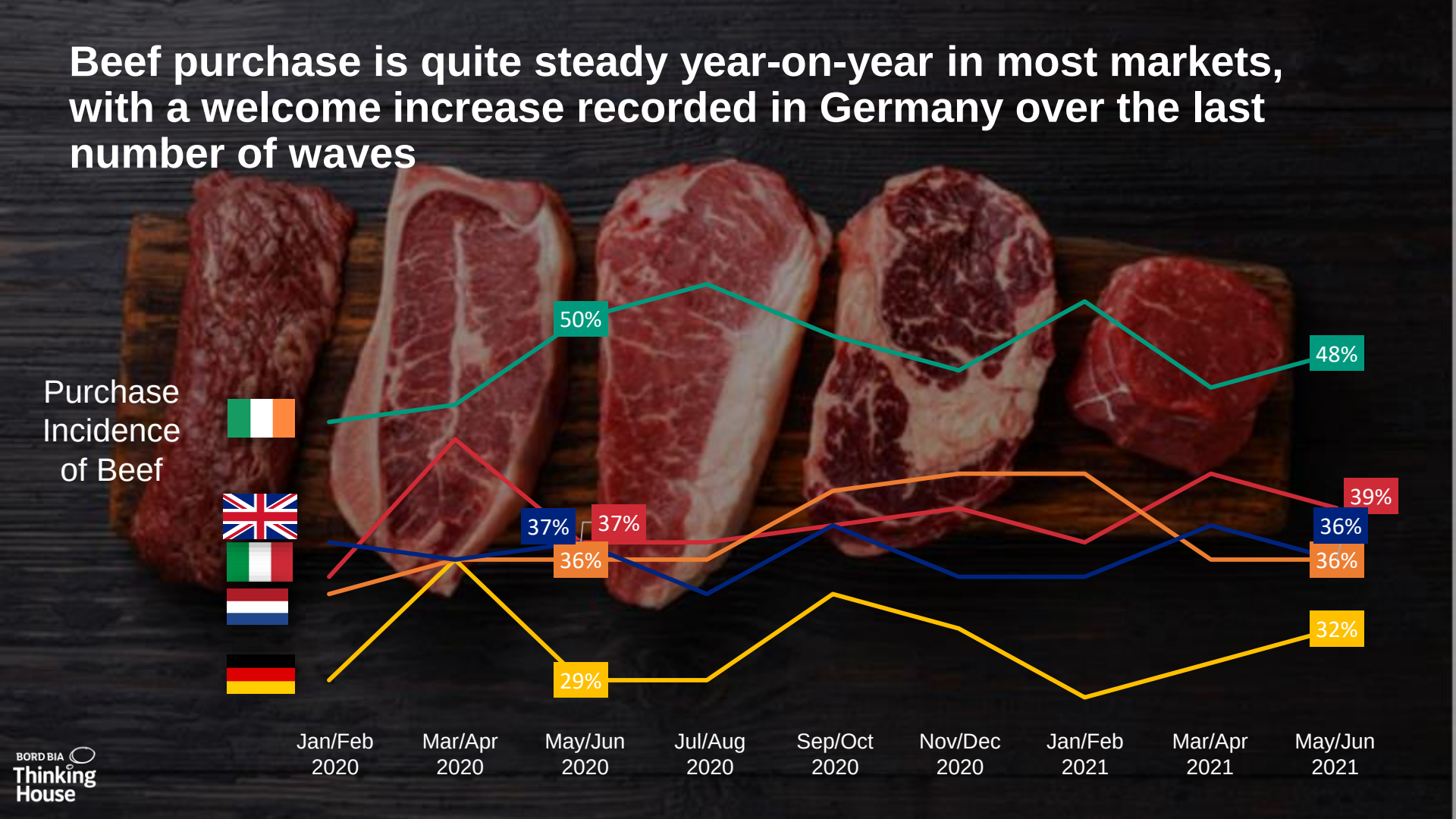
(Base: All Beef Considerers)

Beef purchase is quite steady year-on-year in most markets, with a welcome increase recorded in Germany over the last number of waves



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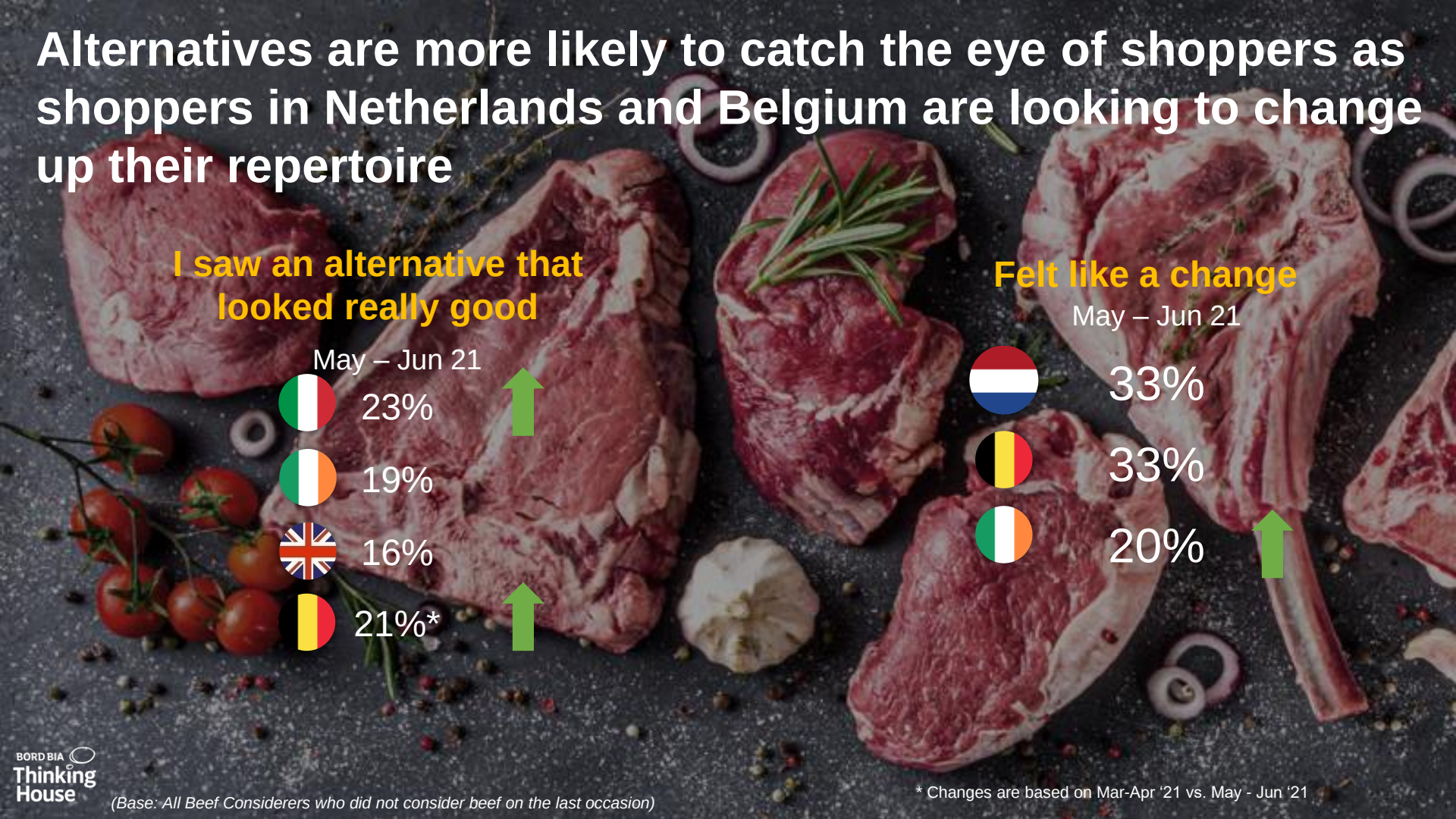
2.

Evidence shoppers are looking for more variation and more concerned about health credentials – growing opportunity for other proteins

Alternatives are more likely to catch the eye of shoppers as shoppers in Netherlands and Belgium are looking to change up their repertoire



(Base: All Beef Considerers who did not consider beef on the last occasion)

* Changes are based on Mar-Apr '21 vs. May - Jun '21

Shoppers are trying to be healthier, which may be impacting beef consideration

I am trying to reduce my intake of beef

	May – Jun 21	YOY Change
	19%	+7%
	14%	+3%
	14%	+1%
	13%	+5%
	13%*	+2%

Wanting a healthier option

	May – Jun 21	YOY Change
	15%	+4%
	11%	+5%
	9%	+2%
	9%	+2%
	10%*	+3%
	8%*	+3%

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* Changes are based on Mar-Apr ‘21 vs. May - Jun ‘21

(Base: All Beef Considerers who did not consider beef on the last occasion)

Chicken and pork experiencing some declines in purchase

	Purchase May – June 21	YOY Change	
	67%	-4%	
	66%	-7%	↓
	53%	-4%	
	50%	-8%	↓
	37%	-1%	
	45%*	-8%	↓
	52%*	-2%	

(Base: All Beef Considerers)

	Purchase May – June 21	YOY Change	
	32%	-6%	↓
	28%	0%	
	26%	+5%	
	20%	-4%	
	19%	+1%	
	31%*	-2%	
	23%*	-8%	↓

* Changes are based on Mar-Apr ‘21 vs. May - Jun ‘21

Growing Opportunity for Lamb & Fish

	Consideration May – June 21	YOY Change
	27%	-5%
	25%	+4%
	16%	+6%
	13%	+2%
	12%	+3%

(Base: All Beef Considerers)

	Consideration May – June 21	YOY Change
	54%	+8%
	52%	+9%
	44%	0%
	40%	+4%
	37%	-3%

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3.

Renewed focus on animal welfare, environment & health could impact future beef consumption

PAST 12 MONTHS CONSUMPTION OF BEEF

The NET consumption position of beef is moving in the right direction in most markets as shoppers returned to beef this year.

	May – Jun 21 NET CONSUMPTION (Proportion Consuming More Beef vs. Less Beef)	YOY Change
	+1%	+7%
	-8%	+1%
	-5%	+4%
	-12%	+5%
	-8%*	+3%

(Base: All Beef Considerers)

* Changes are based on Jan-Feb '21 vs. Mar-Apr '21

Intended Consumption of Beef Over the Next 3 Years

May – Jun 21

But this may be bringing about an increased intention to cut back in the future - intended future consumption of beef is trending down in the majority of markets, especially Ireland.

	NET CONSUMPTION (Proportion Claiming to Consume More vs. Less)	YOY Change
Ireland	-27%	-6%
Italy	-27%	-4%
UK	-31%	-3%
Netherlands	-31%	0%
Germany	-42%	+2%
Sweden	-28%*	-2%
Belgium	-29%*	-3%

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(Base: All Beef Considerers)

* Changes are based on Mar-Apr '21 vs. May - Jun '21

Main drivers of reducing beef consumption are environmental and welfare concerns

Reason for intending to cut beef consumption	 May – Jun '21	 May – Jun '21	 May – Jun '21	May – Jun 21  May – Jun '21	 May – Jun '21	 May – Jun '21	 May – Jun '21
Environmental Reasons	48%	42%	43%	50%	40%	35%	54%
Animal Welfare Reasons	37%	40%	30%	37%	35%	39%	45%

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After months of treating ourselves, and growing importance of health overall, health concerns growing as a motivation for reducing consumption in the future

It's not good for your health

	May – Jun '21	YOY Change
	29%	+9%
	23%	+4%
	20%	+7%
	18%	+4%
	24%*	+6%

(Base: All Beef Considerers who plan to reduce their consumption of beef in the next 3 years)

* Changes are based on Jan-Feb '21 vs. Mar-Apr '21

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4.

With increased influence of sustainability and desire for variation, significant opportunity evident for Irish, grass-fed beef

Strong interest in more Irish Beef options in-store



May – Jun '21



May – Jun '21



May – Jun '21



May – Jun '21

Steaks	45%	50%	53%	55%
Burgers	34%	25%	36%	28%
Roasts	28%	33%	31%	25%

(Base: All Beef Considerers)

The opportunity for Grass-fed is pronounced, especially as shoppers look to cut back that bit more, grass-fed claims tap into clear positive associations with sustainability, animal welfare and naturalness

Proportion claiming grass fed beef would motivate them to purchase beef in the future



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(Base: All Beef Considerers)

* Changes are based on May-Jun ‘21 vs. Mar-Apr ‘21

4 Considerations for Beef Category in Europe as Covid Restrictions Ease

1. Despite return of foodservice, consideration & purchase levels similar to May-June 2020

2. Shoppers looking for variation, and looking after their health - time for innovation in the range & reinforce health associations with beef, chicken and pork

3. Renewed focus on health, animal welfare & environment could impact future consumption – dial up positive communications around role of quality beef in healthy diet and sustainability benefits

4. Significant opportunity evident for Irish, grass-fed beef as it offers the variation shoppers are looking for

Working Together on Shopper Insight in 2022



We want to work with you

Overall and individual market reports available bimonthly

Bespoke retailer-specific reports available

For more information on this project get in touch:

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Thank You

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