







January 2022

Meat Market Seminar – European Retail Trends

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Meat Shopper Insight















- Understanding protein dynamics and meat shopper behaviour
- Supporting your category management for closer category partnership with retailers
- N=500 grocery shoppers per market monthly
- Figures are across Q4 2021 and comparable points in previous years

N= 71,995 interviews conducted to date

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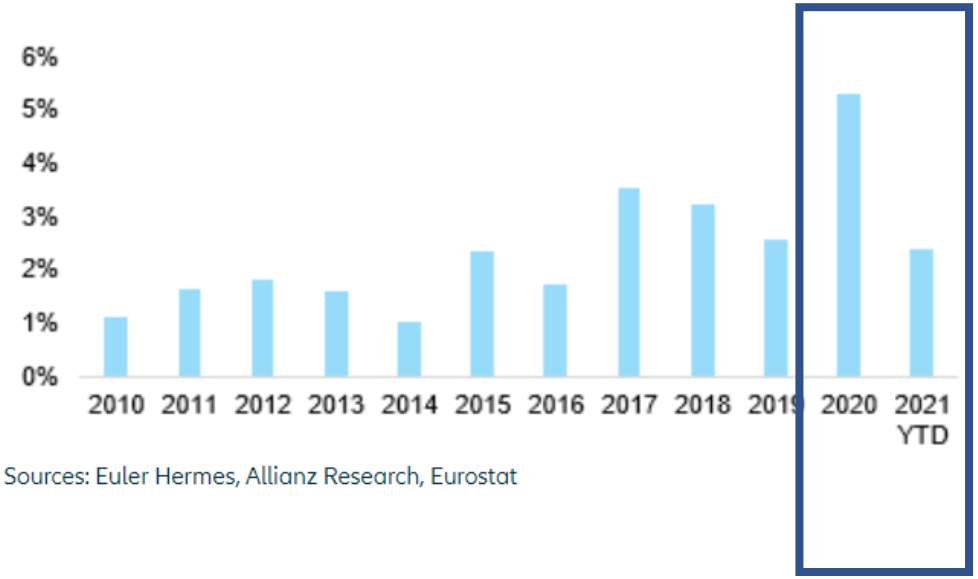
1.

2020 results were very positive for at home beef consumption – but 2021 has fallen back

2020 was unprecedented for retail, 2021 couldn't live up to that

Figure 2 – Food retail sales in EU27 (% change y/y)



Sources: Euler Hermes, Allianz Research, Eurostat

This data from Eurostat highlights how 2020 was a bumper year for food retail sales, with 2021 much more in line with 2019.

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And data suggests alcohol and fresh food was hardest hit as shoppers' share of wallet was shared more with eating and drinking out (Nielsen).

Consideration is down in most markets year-on-year, with the exception of the UK and Germany

Consideration of beef on the Last occasion



(Base: All Beef Considerers)

Marginal declines in purchase across most markets evident, with a slight increase in Ireland recorded.



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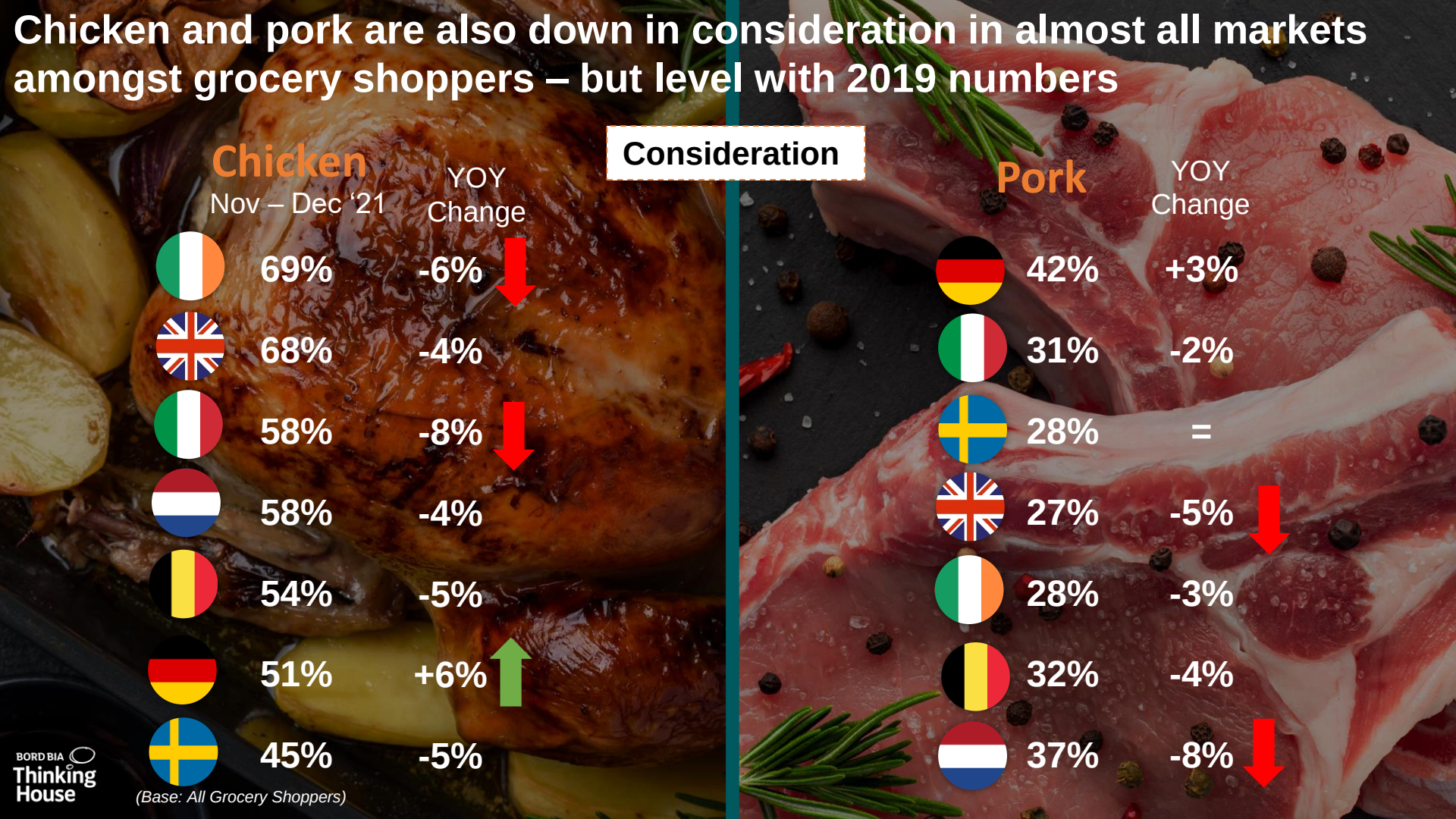
(Base: All Beef Considerers)

Consideration of beef overall amongst grocery shoppers is trending down in key markets

Overall consideration of beef amongst all grocery shoppers							
Nov - Dec ’20	85%	78%	75%	69%	77%	75%	78%
Nov – Dec ’21	**73%**	**72%**	**70%**	**64%**	**78%**	**75%**	**78%**

(Base: All Grocery shoppers)

Chicken and pork are also down in consideration in almost all markets amongst grocery shoppers – but level with 2019 numbers



Evidence of shoppers looking for something different in their repertoire, with more interest in lamb – but have meat alternatives hit a ceiling?

Consideration

Lamb	Nov – Dec '21	YOY Change
	24%	+1%
	21%	-1%
	15%	+3%
	14%	+4%
	12%	+1%
	12%	+2%
	10%	+1%

Meat Alternatives		YOY Change
	19%	+1%
	17%	-3%
	20%	-6%
	14%	-4%
	15%	=
	15%	+6%
	12%	+2%

(Base: All Grocery Shoppers)

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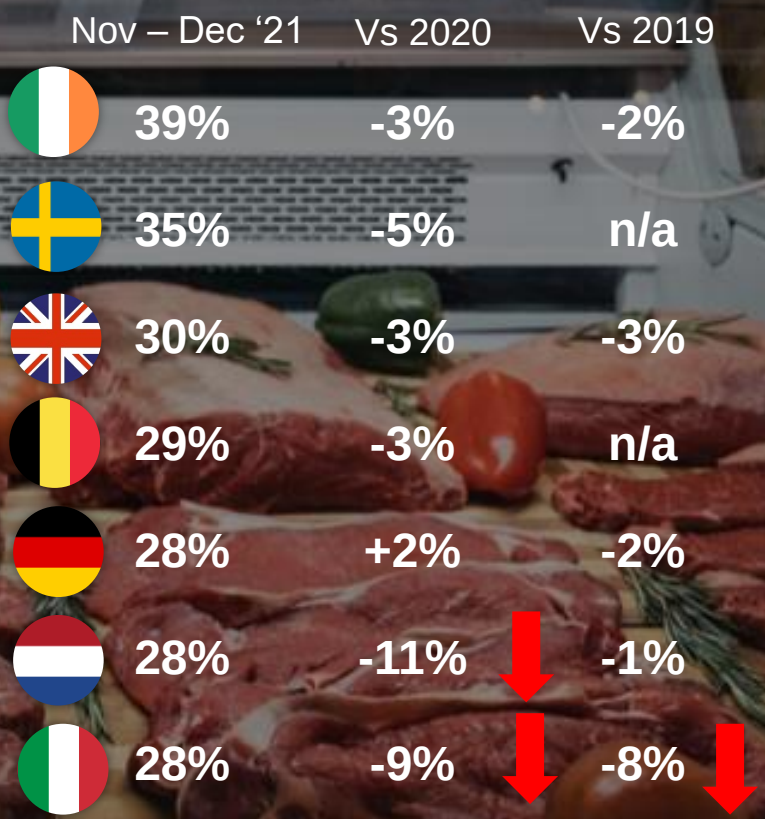
2.

The rising cost of living and cost of production is evident in beef category and impacting purchase – the category is in need of reinvigoration

Engagement (actively reviewing what's on offer) is trending downwards in most markets – suggesting shoppers are less excited by what's on offer



(Base: All Beef Considerers)

The cost of beef in store is turning shoppers away, towards other proteins, where there are more promotions

Barriers to Purchase

It is too expensive

	Nov – Dec '21	YOY Change
Sweden	20%	+2%
UK	18%	+2%
Germany	17%	+4%
Belgium	15%	+3%
Netherlands	15%	0%
Ireland	12%	+3%
Ireland	10%	+3%

Saw an alternative that looked really good

	Nov – Dec 21	YOY Change
Belgium	24%	+3%
Italy	22%	-4%
Ireland	20%	+6%
Netherlands	17%	+10%
Germany	15%	+1%
UK	15%	+2%
Sweden	13%	+5%

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

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3.

With light at the end of the COVID tunnel, sustainability and health has a renewed focus

Intended Consumption of Beef Over the Next 3 Years

Nov – Dec '21

There is a growing expectation that beef consumption will be reduced in the future, with Ireland and Germany increasing in this regard.

In most markets we see that the expected behaviour is for beef consumption to be reduced and not completely stopped, so there is an opportunity to keep consumers in the category.

NET CONSUMPTION
(Proportion Claiming to Consume More vs. Less)


-46%


-32%


-31%


-30%


-30%


-29%


-28%

(Base: All Beef Considerers)

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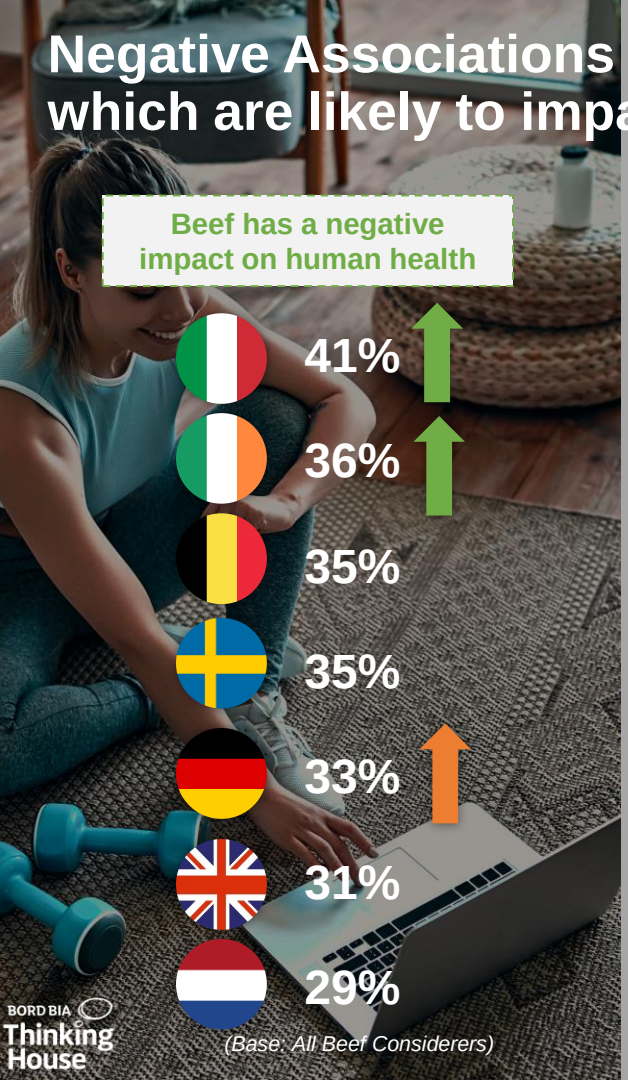
Negative Associations Towards Beef on the Rise in Most Markets, which are likely to impact consideration now and in the future

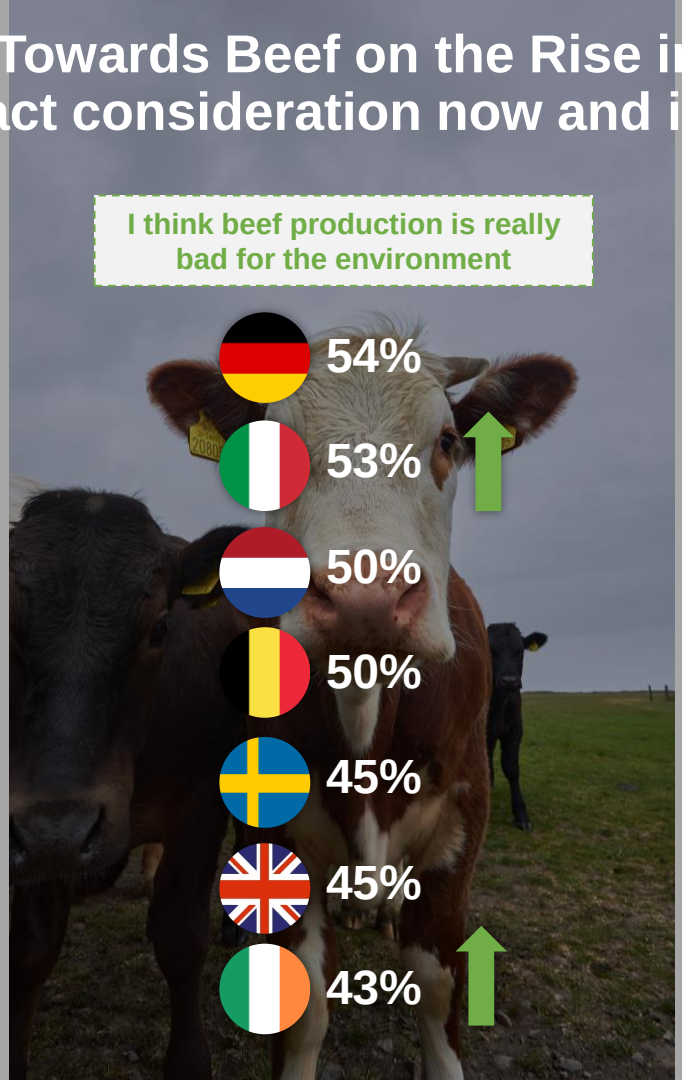
Nov – Dec '21



Beef has a negative impact on human health

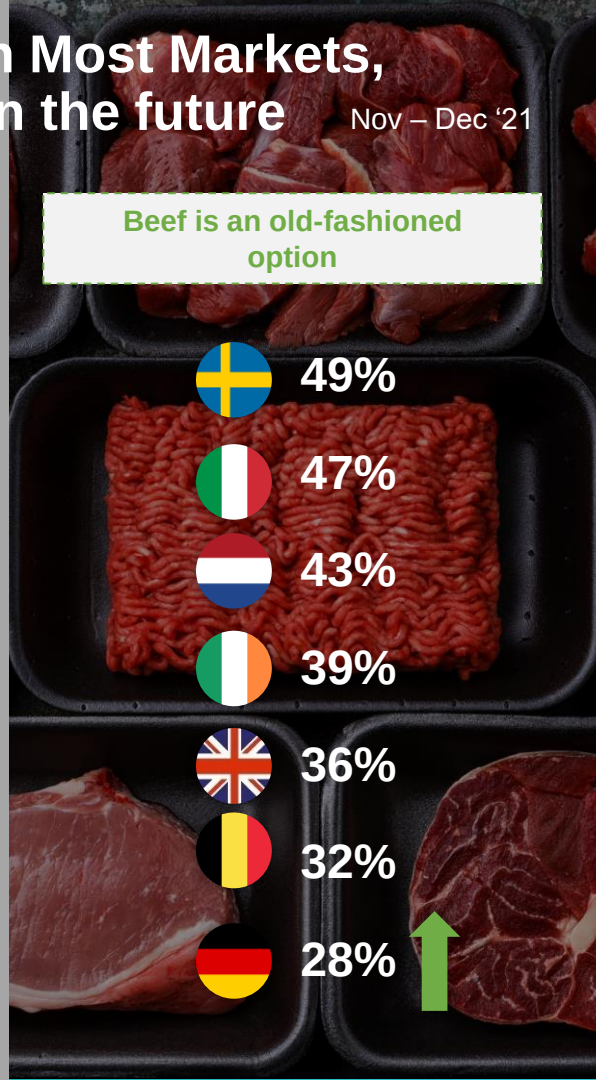
- 41%
- 36%
- 35%
- 35%
- 33%
- 31%
- 29%

(Base: All Beef Considerers)



I think beef production is really bad for the environment

- 54%
- 53%
- 50%
- 50%
- 45%
- 45%
- 43%



Beef is an old-fashioned option

- 49%
- 47%
- 43%
- 39%
- 36%
- 32%
- 28%

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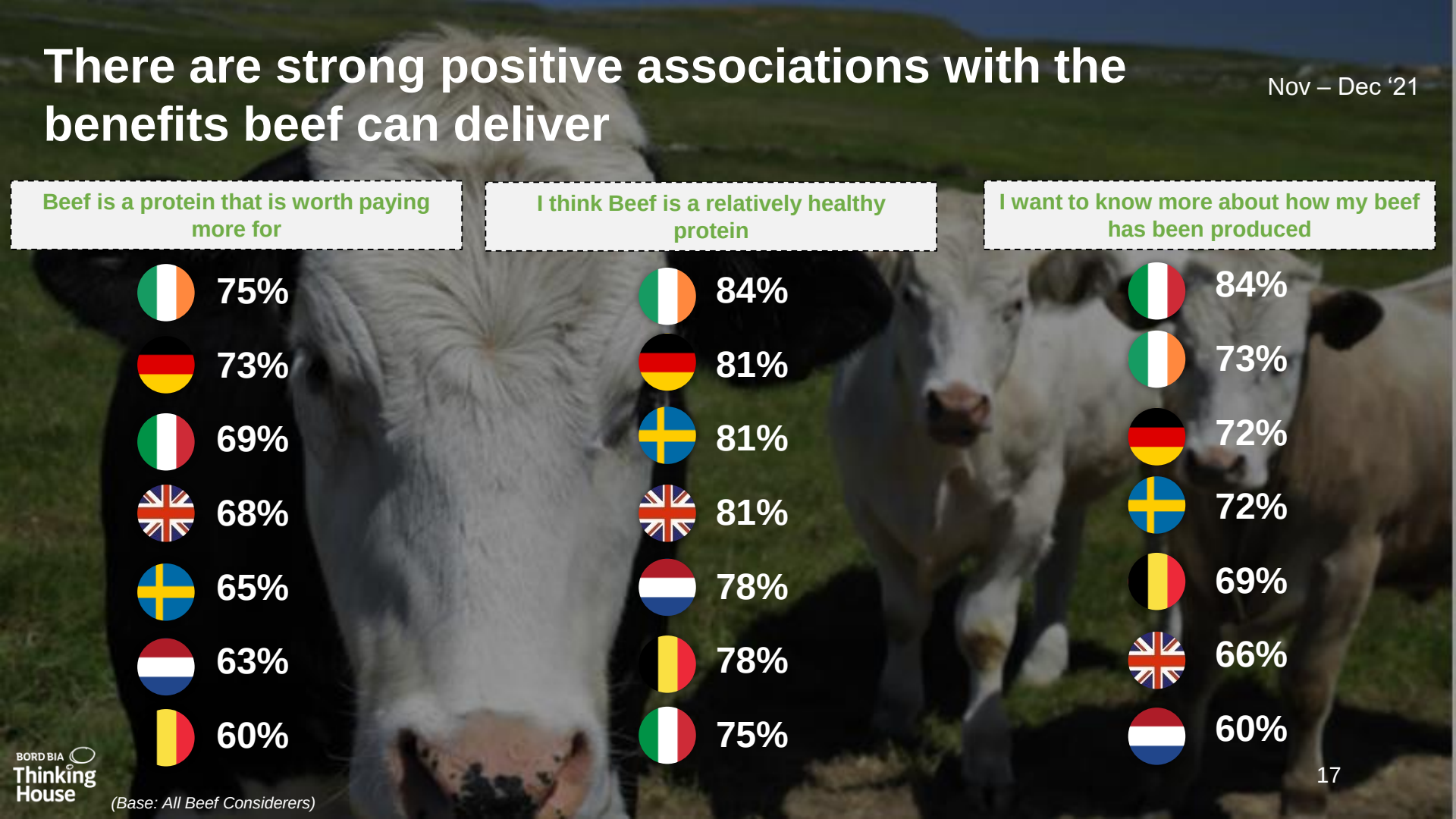
4.

Shoppers are looking for a licence to indulge in beef

There are strong positive associations with the benefits beef can deliver

Nov – Dec ‘21



(Base: All Beef Considerers)

Motivators of Future Purchase

Sustainable and ethically reared beef remains a strong draw but there may be slight nuances needed in the language used across markets to drive persuasion

	Beef which has been reared ethically (animal welfare)	Rank	Beef which is produced to be sustainable	Rank
	33%	1	26%	5
	29%	3	21%	9
	28%	4	31%	2
	28%	5	26%	8
	27%	2	24%	4
	23%	4	21%	8
	20%	3	24%	2

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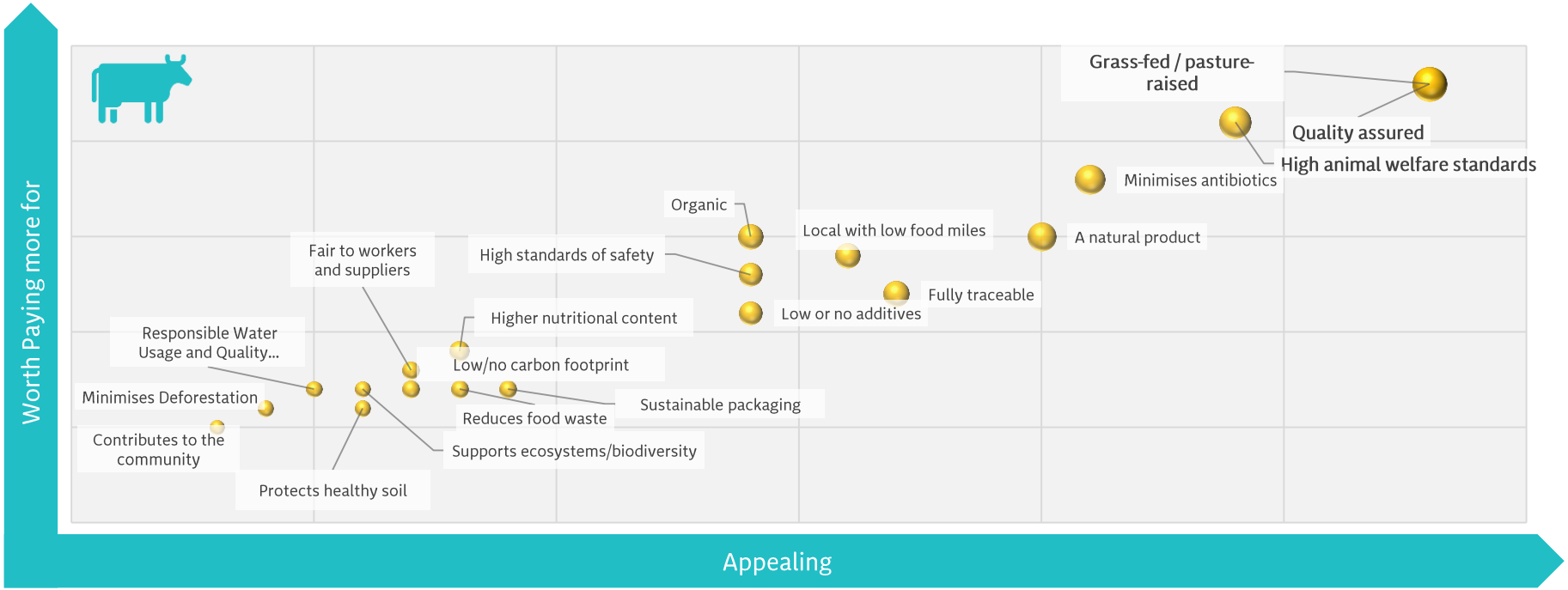
(Base: All Beef Considerers)

Nov – Dec ‘21

Beef: Prioritisation (Global)



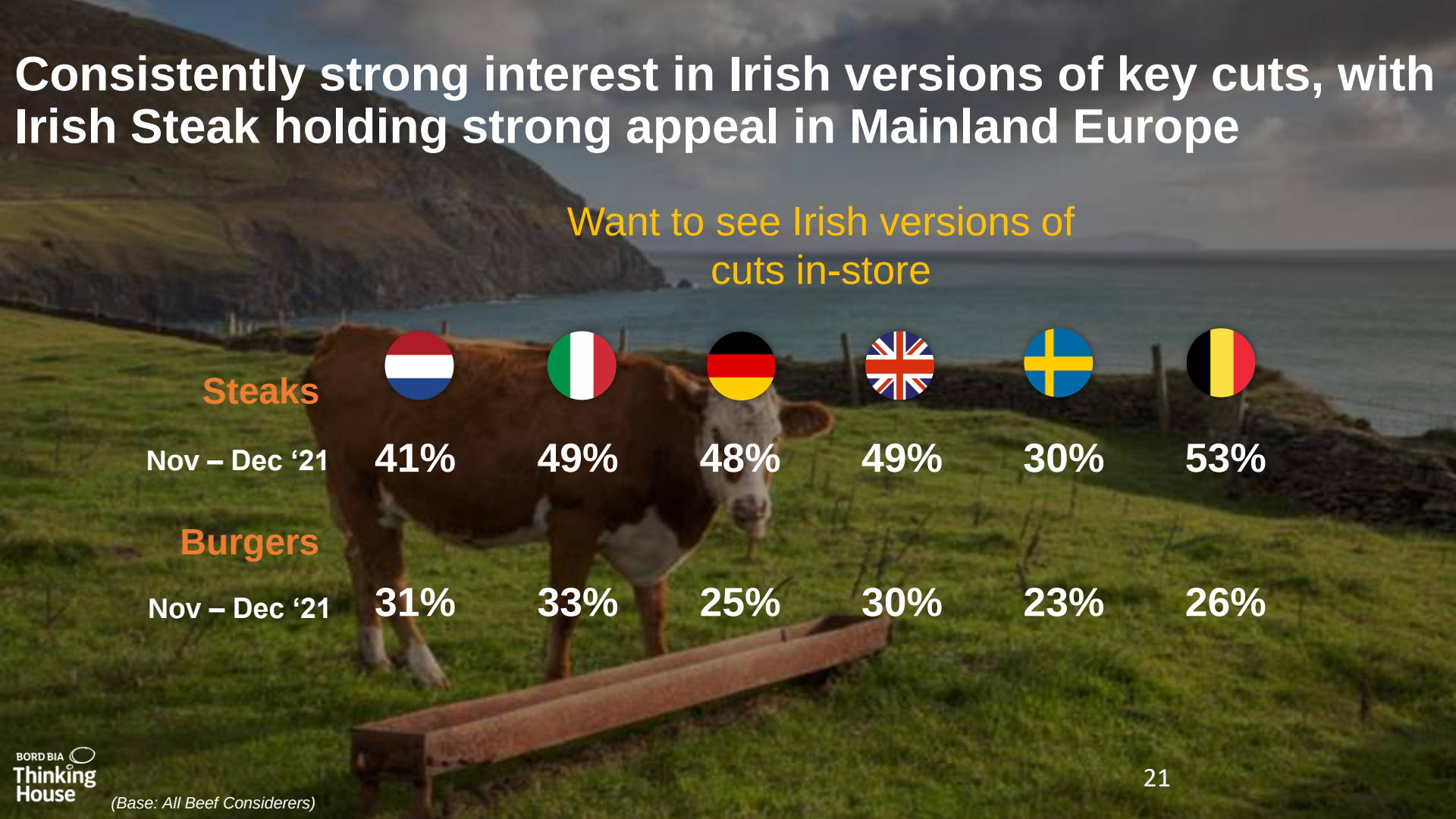
(Base: All Beef Consumers 18-65, n=6,070)

Grass-fed beef is synonymous with high quality beef and is capable of enticing shoppers to trade-up to better better quality beef

	Association with Better Quality beef	Rank	Impacting on enticing shoppers to trade-up	Rank
	43%	1	31%	1
	40%	4	25%	3
	37%	4	23%	4
	36%	2	21%	4
	31%	6	24%	4
	29%	4	21%	4
	24%	6	15%	6

(Base: All Beef Considerers)

Consistently strong interest in Irish versions of key cuts, with Irish Steak holding strong appeal in Mainland Europe



Want to see Irish versions of cuts in-store

Steaks						
Nov – Dec ‘21	41%	49%	48%	49%	30%	53%
Burgers						
Nov – Dec ‘21	31%	33%	25%	30%	23%	26%

(Base: All Beef Considerers)

So What…

1.

Remind and excite consumers of the pleasure and comfort of at home consumption across all proteins.

2.

Renovate and innovate ranges, formats, sizes and promotion mechanics to tackle perceived expensiveness of beef versus other proteins and to help offset rising costs across all categories.

3.

Dial up the positive associations to counter act the growing negative messages around red meat. Production, rearing, presentation and and health benefits can all reinforce the strengths of beef.

4.

Capitalise on the positive light in which Irish meat is viewed to grow beef and other categories such as lamb. Highlight how the Irish offering is different to others, leveraging sustainability, trust, and low intensity production

5.

Maintain a consistent message of Irish Grass fed beef, but adapt language and imagery for different markets and different retailers.

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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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