Halal – Dispelling the myths and exploring the market

Lamb retail and consumer trends

Grace Randall – Retail Insight Manager

AHDB: Retail and Consumer Insight Introduction

What we do
AHDB's Retail and Consumer Insight team actively track, monitor and evaluate consumer behaviour.

We use this to support growth in our industries by:

- Providing a better understanding of how consumers shop
- Helping levy payers understand their final customers needs

How we do this
Through bespoke consumer research and a range of subscriptions.
We analyse primary data, online surveys, shopper data and review specialist consumer research reports.


Steven Evans
Senior Consumer Insight Manager


Kim Heath
Senior Retail Insight Manager


Susie Stannard
Consumer Insight Manager


Rebecca Gladman
Retail Insight Manager


Grace Randall
Retail Insight Manager


Cathy Burton
Trainee Analyst

Working in close collaboration with AHDB's Market Development team and industry partners.

Retail and consumer insight

What are shoppers buying?

99.7%

Households buy cow's dairy per year

598 million

Kilograms of beef sold through retail

69 million

Lamb kebab meals in foodservice

Source: Kantar, 52 w/e 12 June 2022

Retail and consumer insight

What do consumers think?

83%
concerned about plastic usage[1]

36%
plan on eating out less[2]

51%
believe beef is a good source of protein[2]

Source: 1 – AHDB/YouGov August 2022, 2 – AHDB/YouGov May 2022

Retail and consumer insight

Impact for levy payers

84%

of stakeholders we have presented to said they definitely will or potentially will make a change following our insights

Including changes in store

> The insights allows us to focus on the key opportunities to drive category and retailer growth
>
> Beef processor

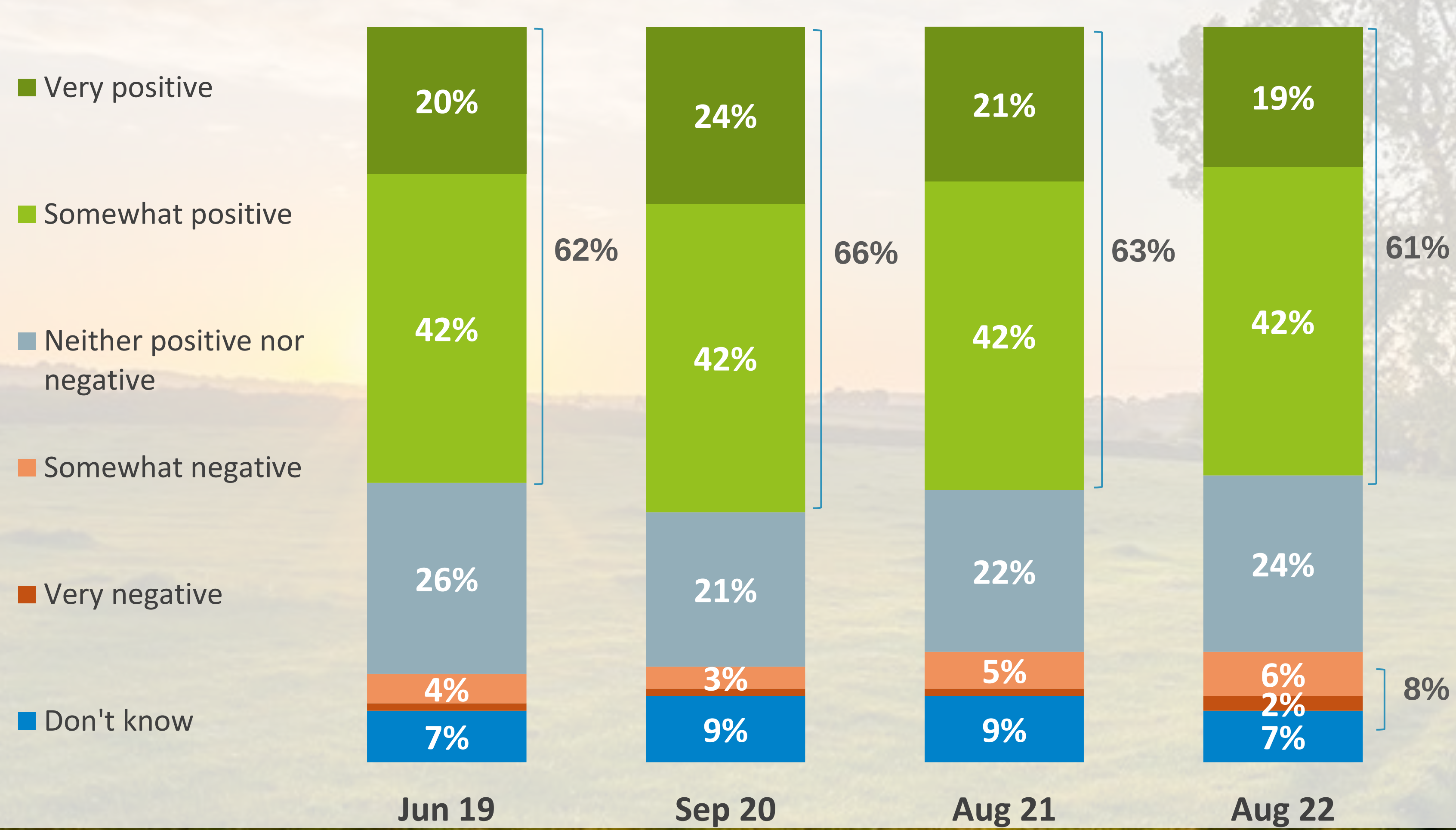
> The insights will be used to inform and support consumer work on dairy and sustainability, which is a key strategic area for us
>
> Dairy trade association

> We will be using this information to share with customers and internally to educate and influence change
>
> Pork processor

We also develop and evaluate our marketing campaigns

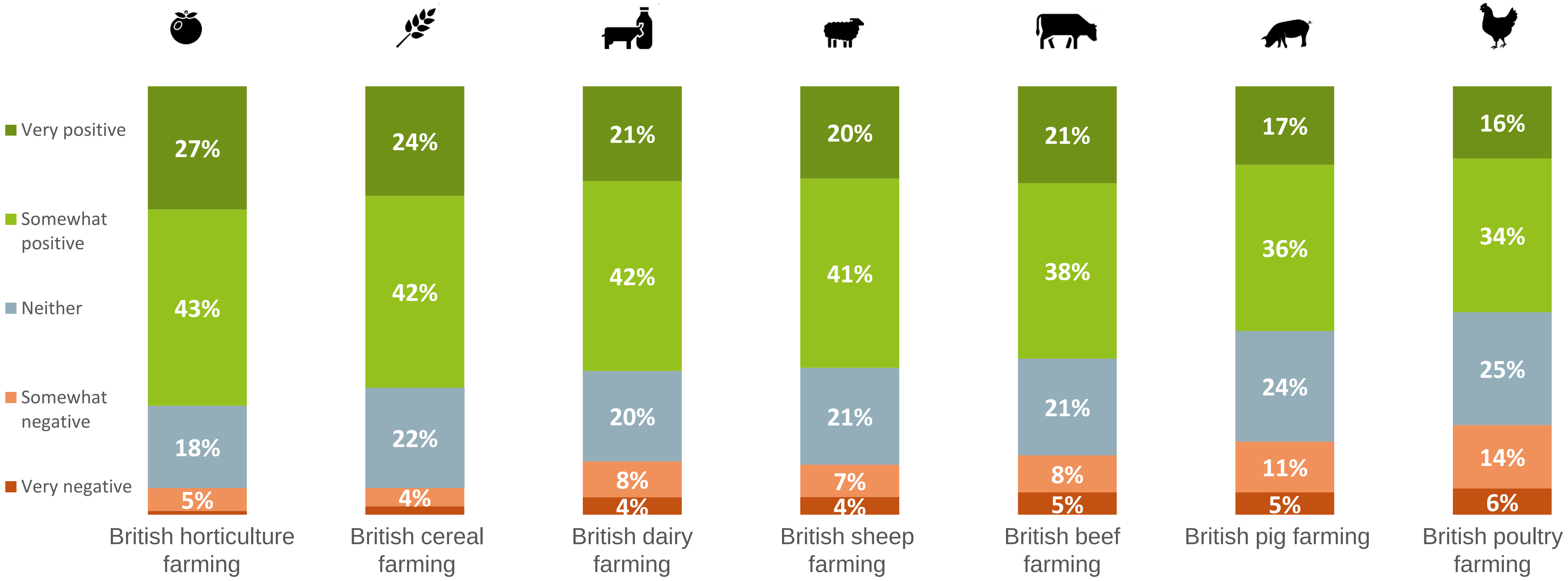
Consumer views on agriculture

Consumers are largely positive about agriculture



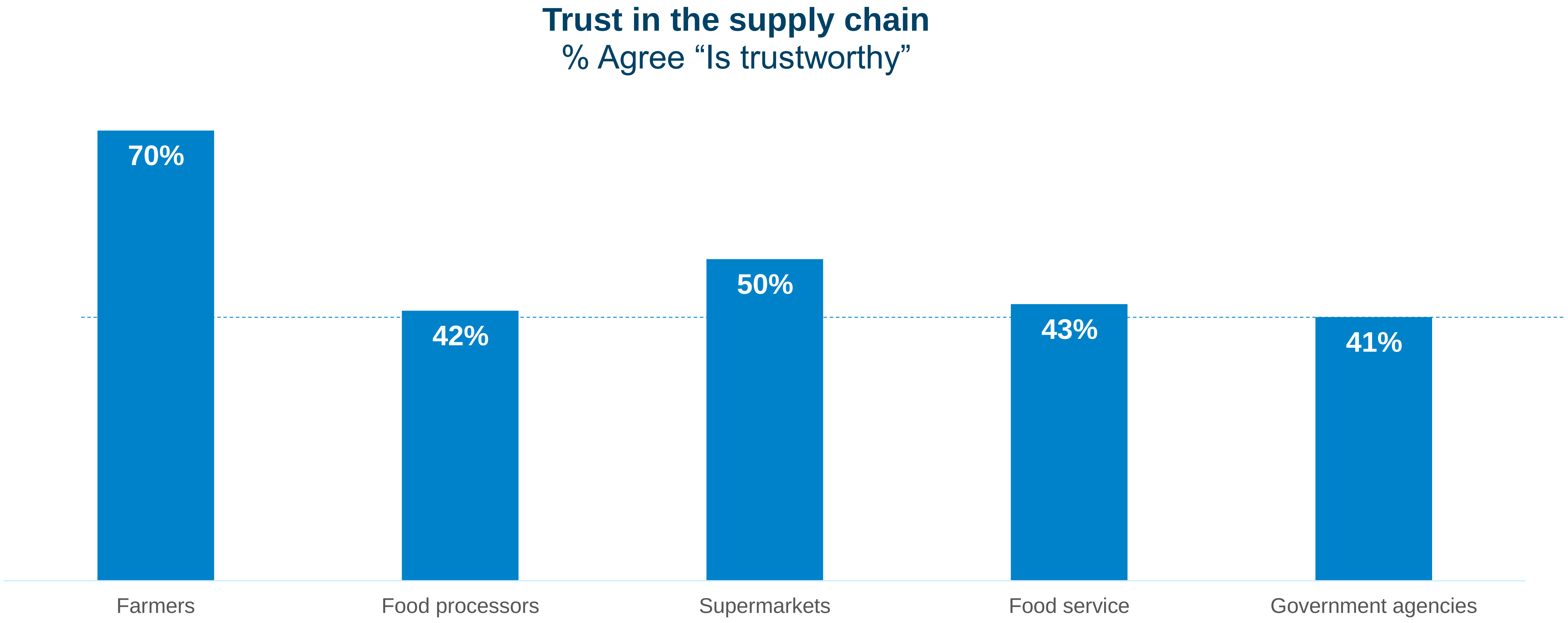
Source: AHDB/Blue Marble, Trust Research, 2022

Some signs of more negativity emerging around the pig and poultry sectors



Source: AHDB/Blue Marble, Trust Research, 2022

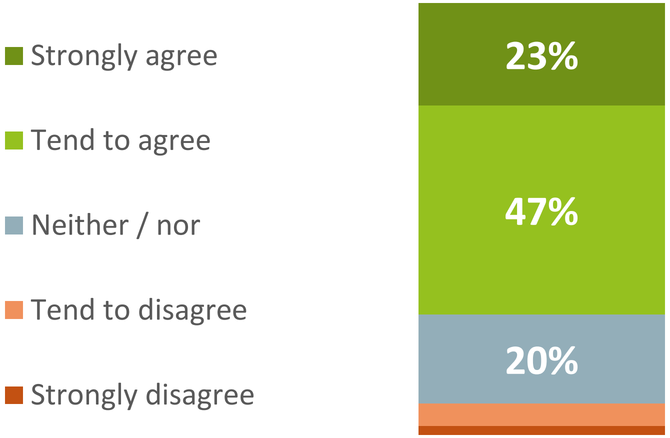
Farmers have consistently been the most trusted part of the supply chain



Source: AHDB/Blue Marble, Trust Research, 2022

What builds trust?

‘Farmers are trustworthy’



Drivers of Trust: Farmer Performance

HIGHER CONTRIBTION

- Farmers deliver on their promises
- Farmers care about animals
- Farmers care about people
- Farmers are experts at what they are doing
- Farmers care about the planet
- Farmers communicate well to consumers

Source: AHDB/Blue Marble, Trust Research, 2022

Follow our social channels:

Consumer and retail landscape for lamb

Consumption is still much more impacted by the pandemic than by the cost-of-living crisis

More at home meals

Eating earlier

Less guests

Our repertoire of meals remains largely unchanged

Sandwiches
5.0bn occasions
+0.1ppts YoY
-0.2ppts vs 2019

Italian Meals
2.4bn occasions
+0.5ppts YoY
+0.1ppts vs 2019

Pies/Pasties/Pastries
1.5bn occasions
+0.2ppts YoY
+0.2ppts vs 2019

Pizza
1.4bn occasions
+0.3ppts YoY
+0.2ppts vs 2019

Soup
1.3bn occasions
-0.2ppts YoY
+0.2ppts vs 2019

Roast Dinners
1.2bn occasions
-0.1ppts YoY
-0.2ppts vs 2019

Indian Foods
1.1bn occasions
+0.2ppts YoY
-0.1ppts vs 2019

Oriental Foods
1.0bn occasions
+0.3ppts YoY
+0.3ppts vs 2019

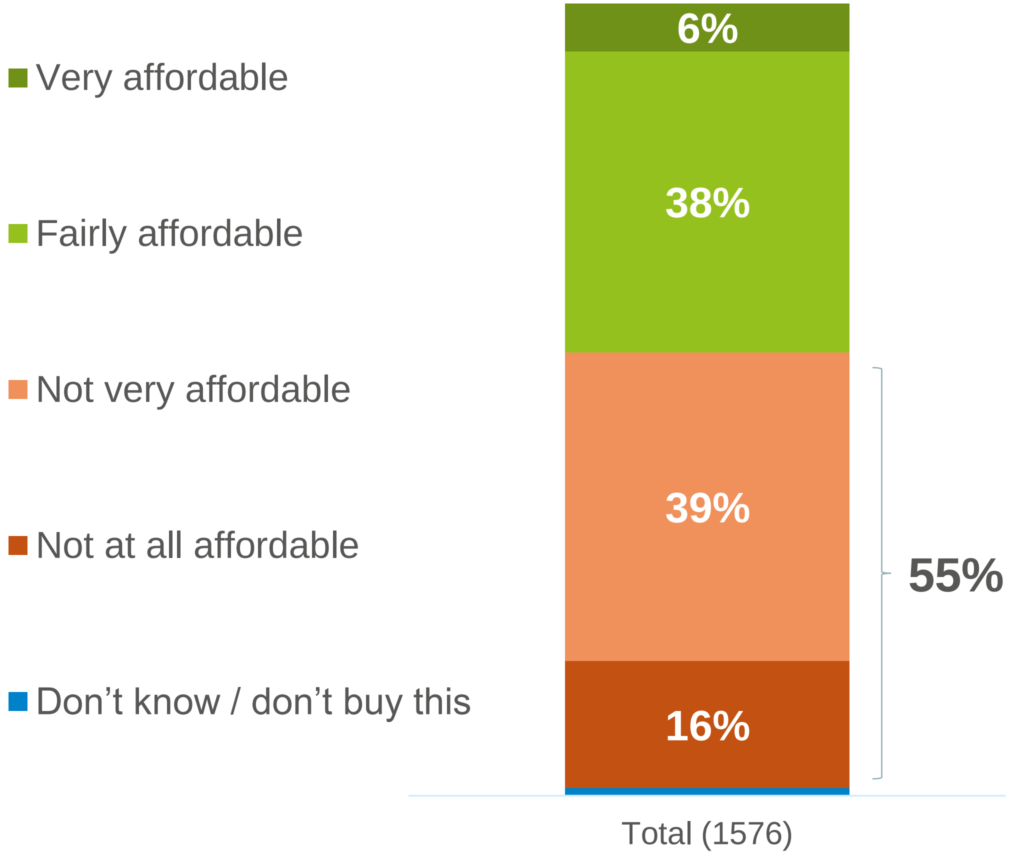
Vegetarian Dishes
936m occasions
+0.5ppts YoY
+0.7ppts vs 2019

Toast Meals
679m occasions
+/-0ppts YoY
+/-0ppts vs 2019

Main Meals are defined as Lunch, Teatime, and the Evening Meal.

Source: Kantar, Usage data, Main Meals, 52 w/e 12 June 2022

Consumers are increasingly finding food unaffordable



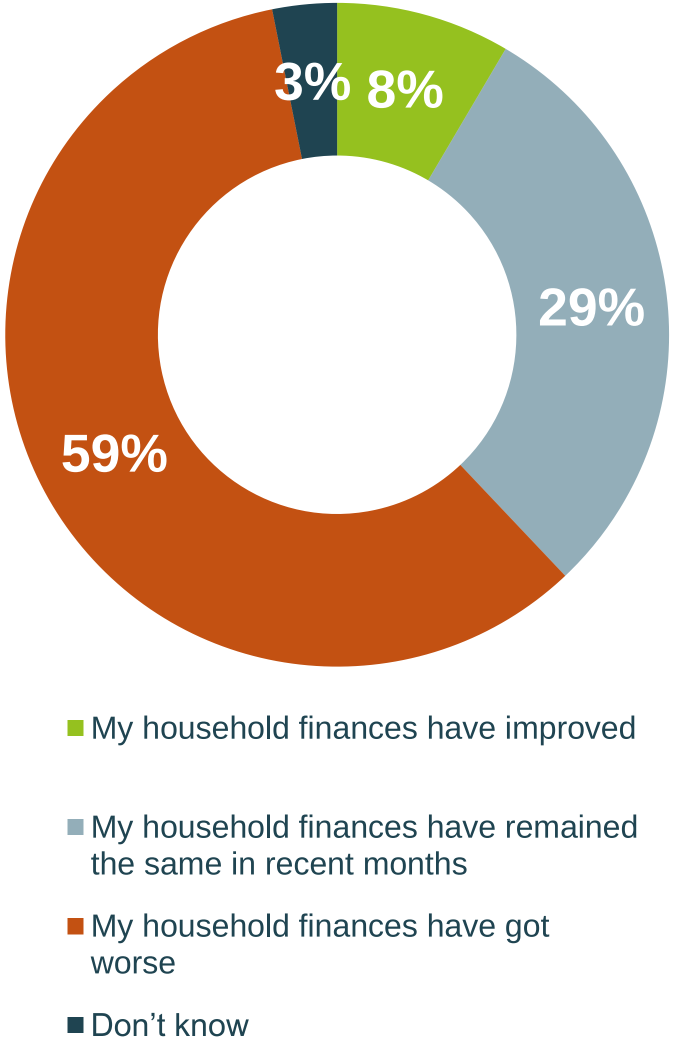
Source: AHDB/Blue Marble, Trust Research, 2022

How consumers are responding?

Category repertoire	Buy less	Tier mix	Promotions	Store mix
38%	24%	22%	10%	7%

Source: Kantar FMCG panel data 12 w/e September 2022, levers for growth model

Scratch and batch cooking could increase as shoppers look to save money



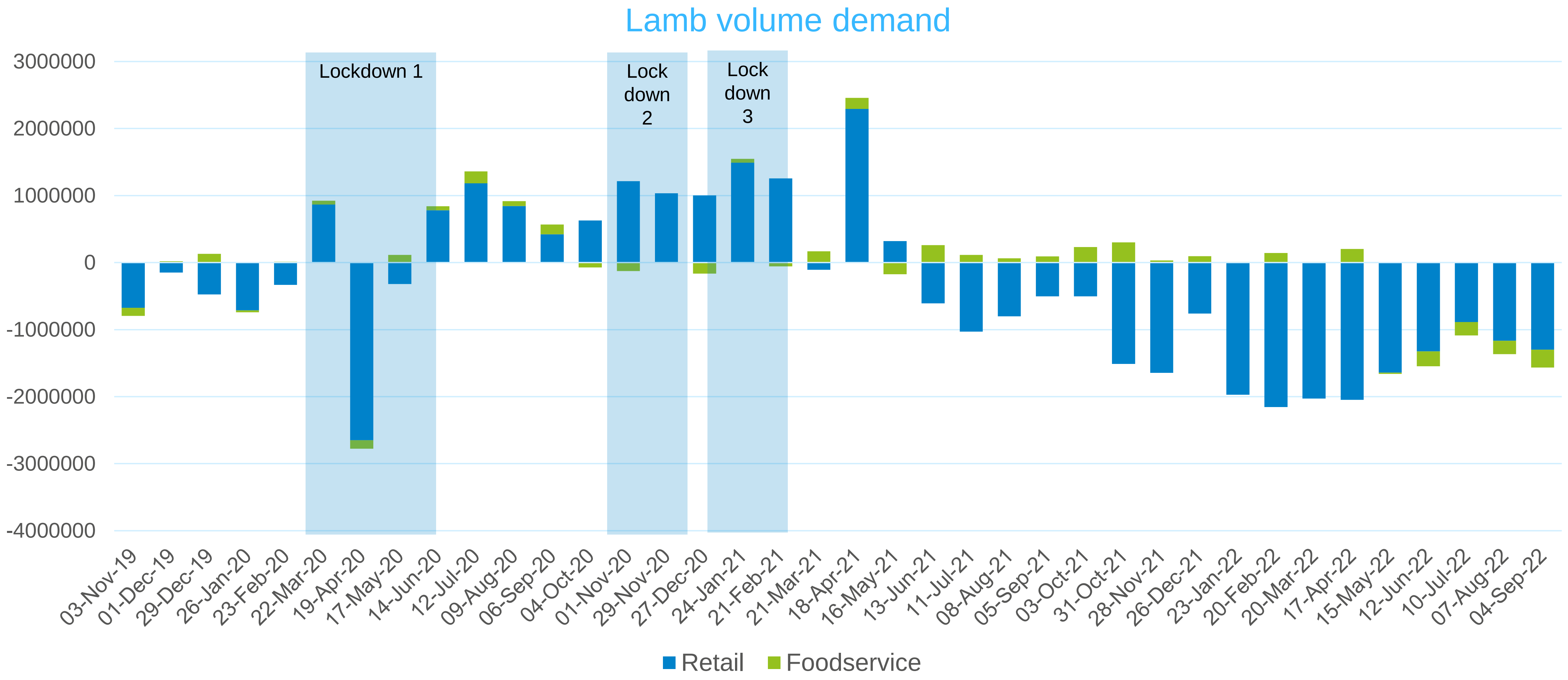
50% Reduce food waste

34% Batch cook more

33% Cook from scratch more

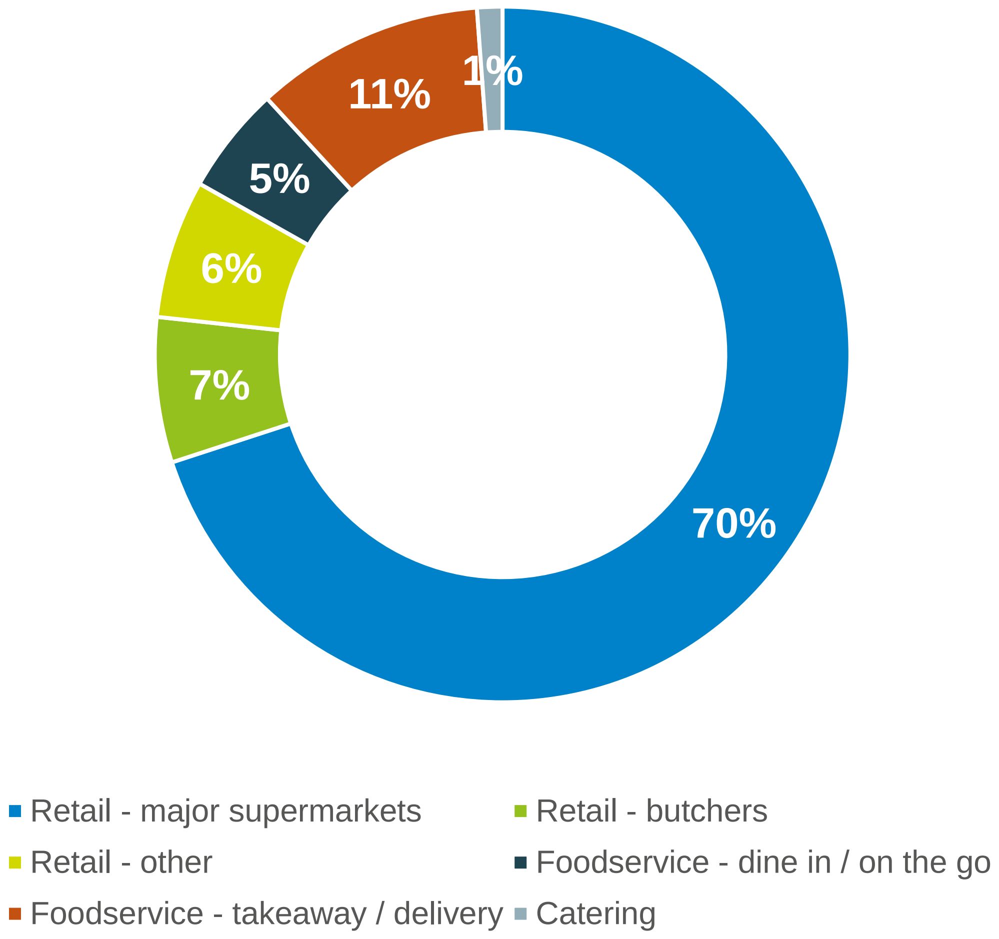
Source: AHDB/YouGov, August 2022

Lamb demand benefitted from lockdowns



Source: AHDB/Kantar, rolling 4 w/e, year on year difference

The majority of lamb volume sales go through major supermarkets



Source: Kantar/AHDB, total volumes, 52 w/e 5 September 2022

Major supermarkets – Tesco, Sainsburys, Asda, Morrisons, Lidl, Aldi, Co-op, Waitrose, M&S and Iceland

Concerns related to health and environment have eased as expense drives performance

26% eaten less meat

52% become more expensive

33% pts

-15% pts

-14% pts

Source: AHDB/YouGov Consumer Tracker, August 2022

Reduction of meat could be a last resort and some shoppers are already there

Lunch

Evening Meal

6 or fewer food/drink items

78% of lunches
+5%

66% of evening meals
+3%

Evening meal

with meat	without meat
£3.01	£1.71

Source: Kantar, 4 w/e August 2022 vs average 52 w/e July 2022

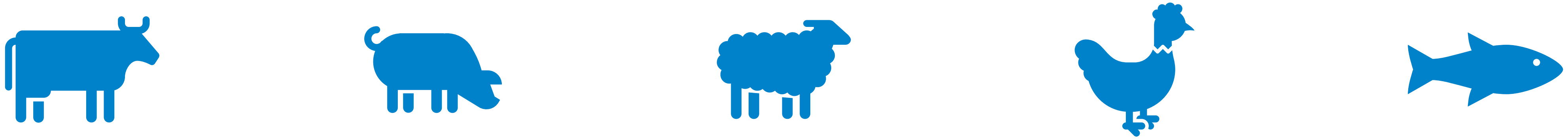
Meal needs vs 2019

+15%
Filling

+9%
Easy to prep

Source: Kantar, 52 w/e Aug 2022

This has already contributed to losses for meat and dairy…with lamb struggling in retail

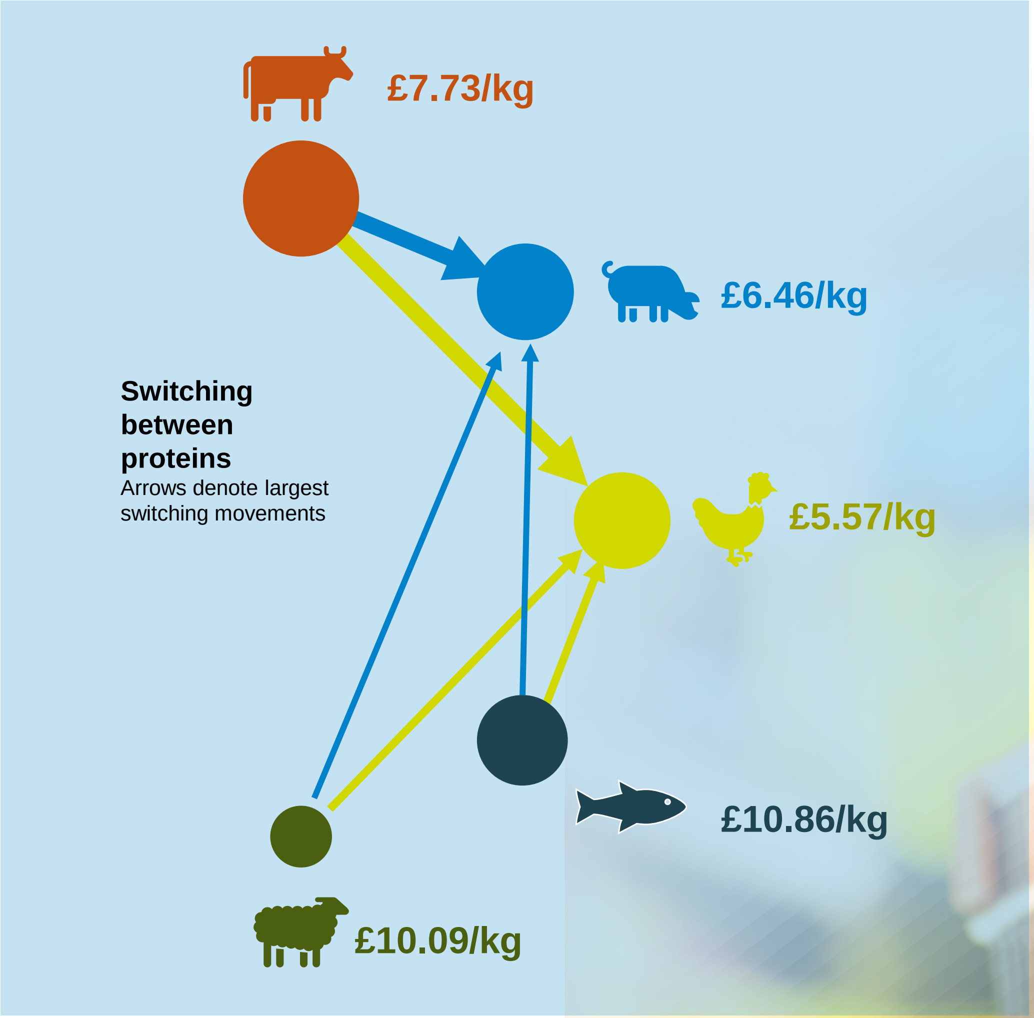


vs 2021	**-9%**	**-4%**	**-18%**	**-3%**	**-9%**
vs 2019	-9%	0%	-17%	0%	-5%

vs 2021	**-6%**	**-3%**	**-4%**	**-10%**	**-4%**
vs 2019	-2%	+6%	-2%	-8%	+13%

Source: Kantar, 12 w/e 4 September 2022

We’re starting to see some movement to cheaper proteins and products



Source: Kantar, 12 w/e 4 September 2022

Cheaper processed cuts are performing well in lamb in retail

AHDB






	Roasting joints	Chops	Mince	Steaks	Processed	Added value	Ready meals
Price	£11.67/kg				£6.73/kg	£11.72/kg	£8.57/kg
Volume							
	3.4m kg	1.6m kg	1.3m kg	1.1m kg	1.2m kg	1.3m kg	3.5m kg
	-24%	-27%	-30%	-32%	+11%	-31%	-6%

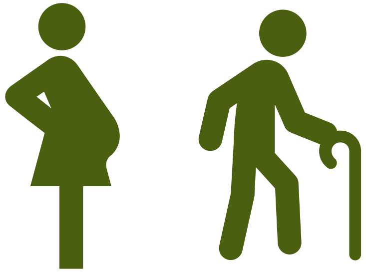
Source: Kantar, 12 w/e 2 October 2022

Lamb burgers grew as people looked for new tastes this summer

+79

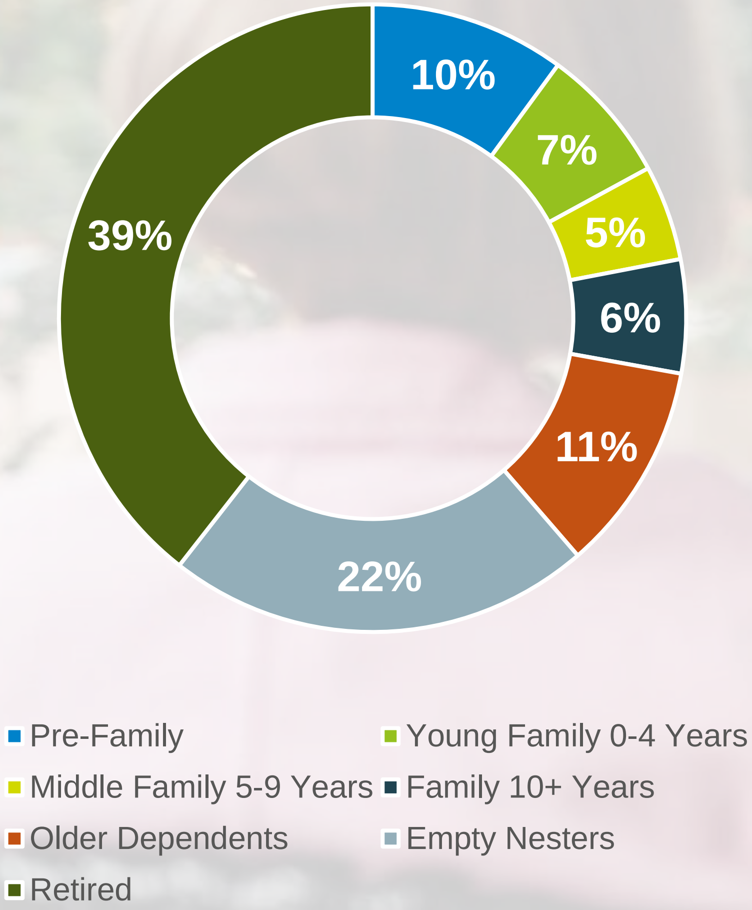
tonnes

of lamb burgers



Source: Kantar, 12 w/e 2 October 2022

Who buys lamb?



75%
Lamb chops and ready meals bought by shoppers aged over 55

Source: Kantar, 12 w/e 2 October 2022

In foodservice lamb returns to pre-covid levels but much more volume is through takeaways

AHDB

Lamb in foodservice

-16%	+0%
Year-on-year	versus 2019

Lamb eaten out

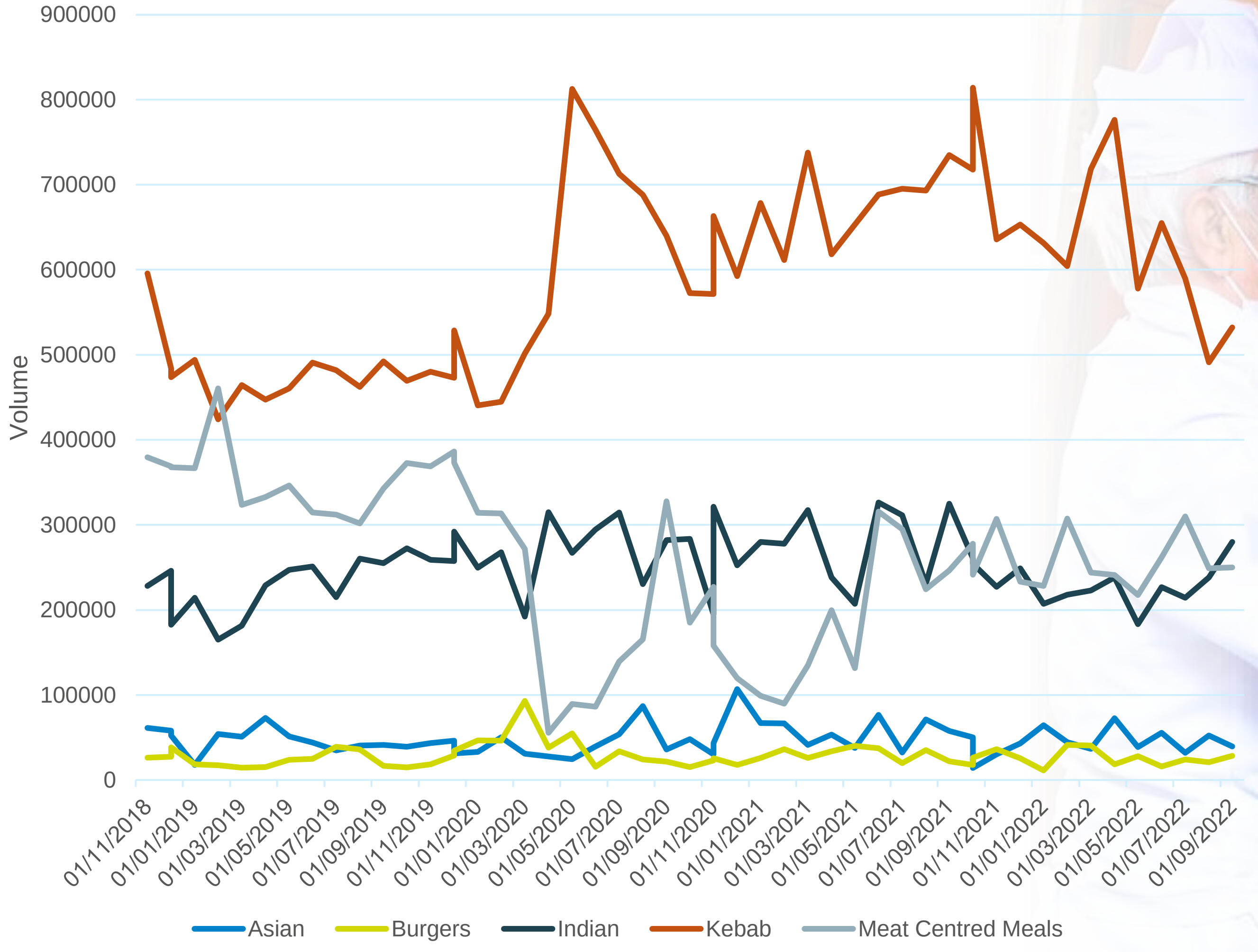
+1%	-21%
Year-on-year	versus 2019

Lamb in takeaways

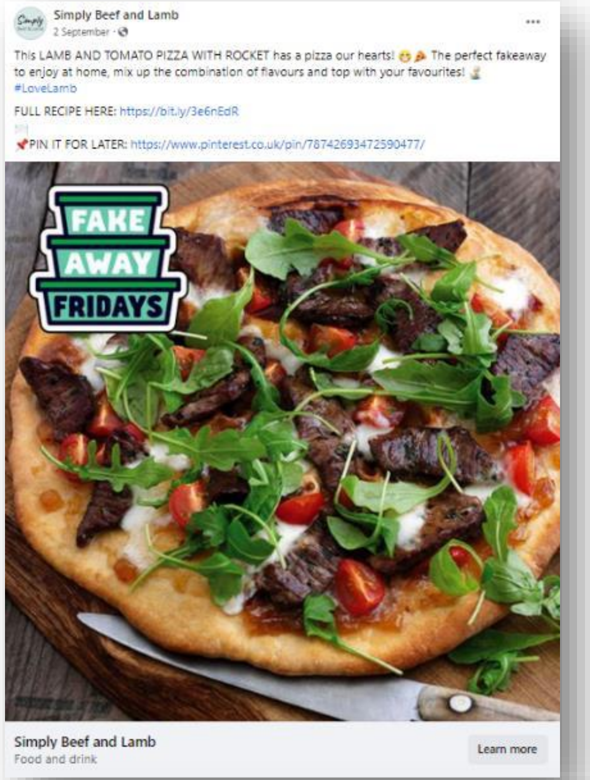
-24%	+18%
Year-on-year	versus 2019

Source: AHDB/Kantar, 12 w/e 4 September 2022

Kebabs boomed during lockdown



Source: AHDB/Kantar, 4 w/e rolling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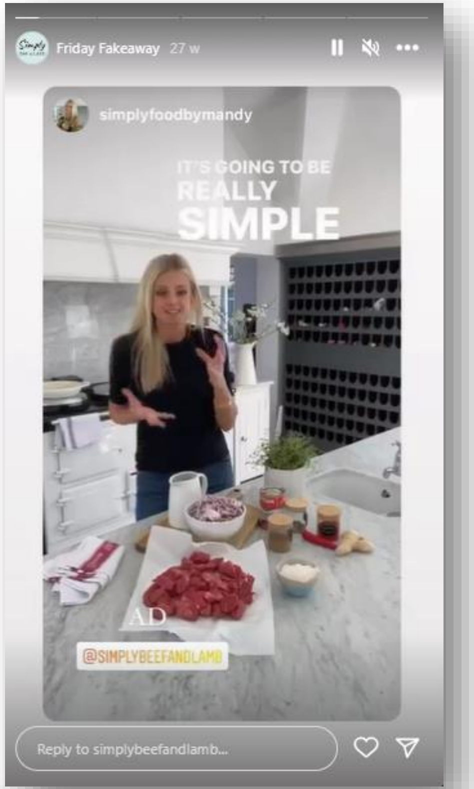
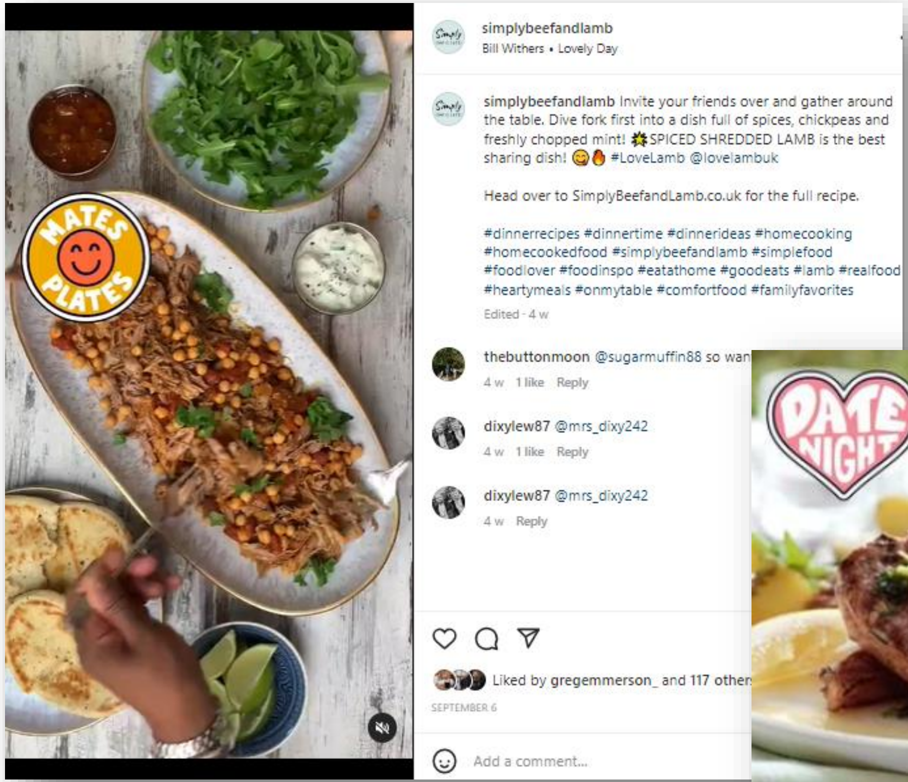
2 September
This LAMB AND TOMATO PIZZA WITH ROCKET has a pizza our hearts! The perfect fakeaway to enjoy at home, mix up the combination of flavours and top with your favourites!
#LoveLamb
FULL RECIPE HERE: https://bit.ly/3e6nEdR
PIN IT FOR LATER: https://www.pinterest.co.uk/pin/78742693472590477/
FAKE AWAY FRIDAYS
Simply Beef and Lamb
Food and drink
Learn more


Friday Fakeaway 27 w
simplyfoodbymandy
IT'S GOING TO BE REALLY SIMPLE
AD
@SIMPLYBEEFANDLAMB
Reply to simplybeefandlamb...


MATES PLATES
simplybeefandlamb
Bill Withers • Lovely Day
simplybeefandlamb Invite your friends over and gather around the table. Dive fork first into a dish full of spices, chickpeas and freshly chopped mint! SPICED SHREDDED LAMB is the best sharing dish! #LoveLamb @lovelambuk
Head over to SimplyBeefandLamb.co.uk for the full recipe.
#dinnerrecipes #dinnertime #dinnerideas #homecooking #homecookedfood #simplybeefandlamb #simplefood #foodlover #foodinspo #eatathome #goodeats #lamb #realfood #heartymeals #onmytable #comfortfood #familyfavorites
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thebuttonmoon @sugarmuffin88 so wan
4 w 1 like Reply
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4 w 1 like Reply
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4 w Reply
Liked by gregemmerson_ and 117 other
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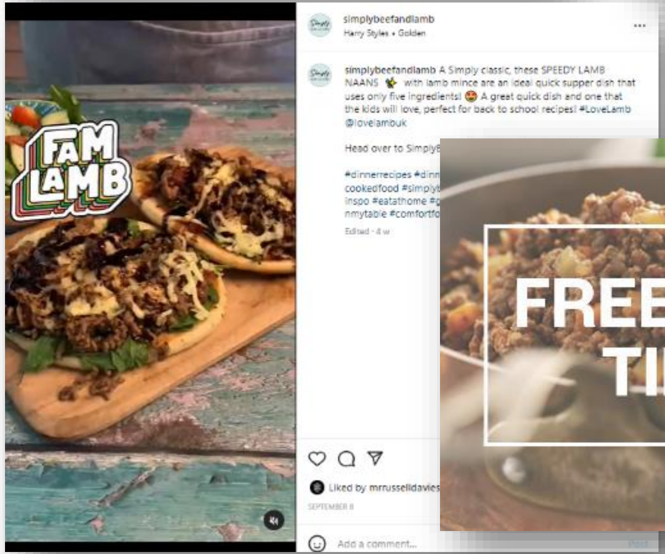
DATE NIGHT


FAM LAMB
simplybeefandlamb
Harry Styles • Golden
simplybeefandlamb A Simply classic, these SPEEDY LAMB NAANS with lamb mince are an ideal quick supper dish that uses only five ingredients! A great quick dish and one that the kids will love, perfect for back to school recipes! #LoveLamb @lovelambuk
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Beef recipes

Halal consumers

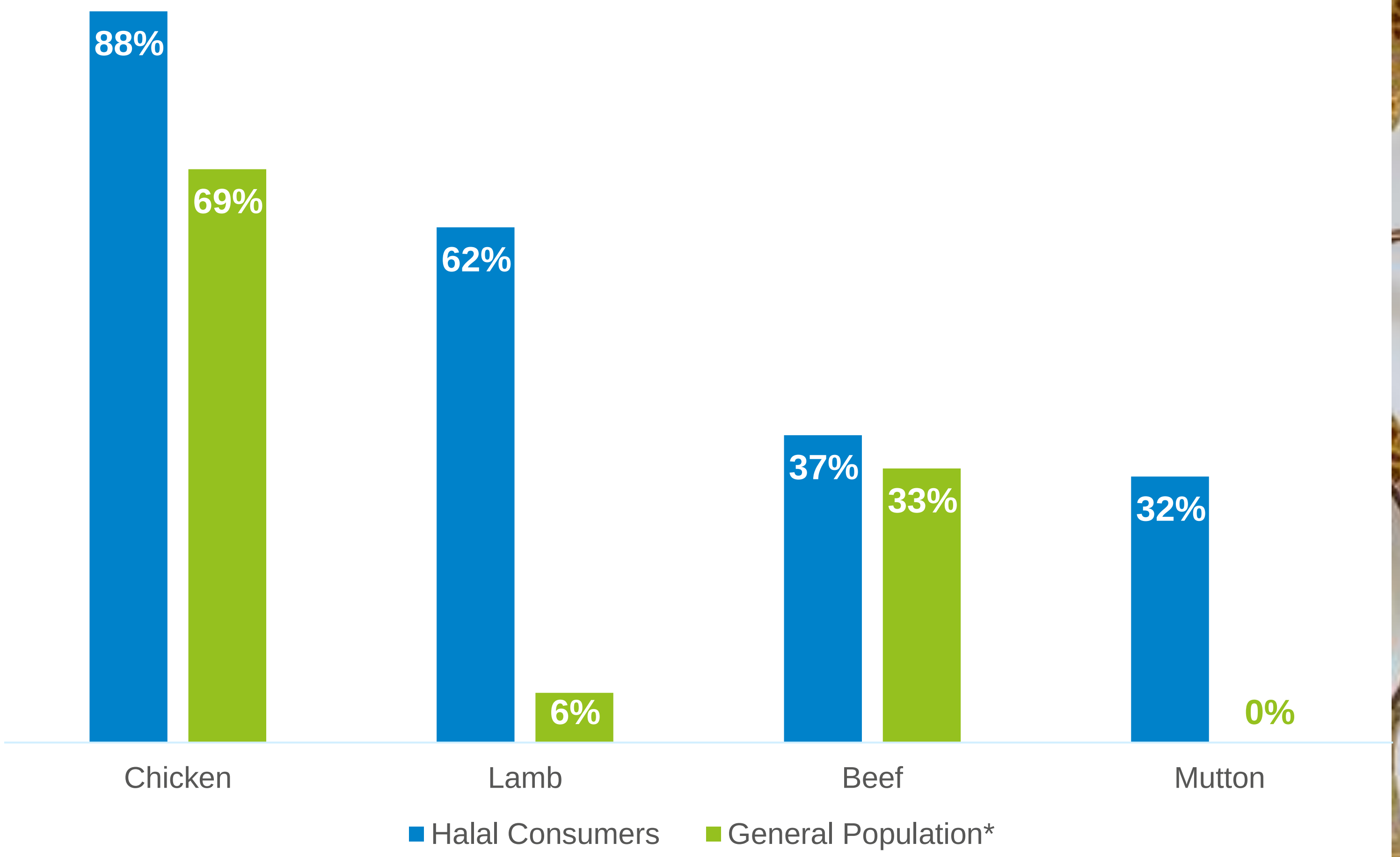
£4.64 billion

was spent on halal food and beverages in the UK in 2016

Source: AHDB – Demand for halal meat report 2020

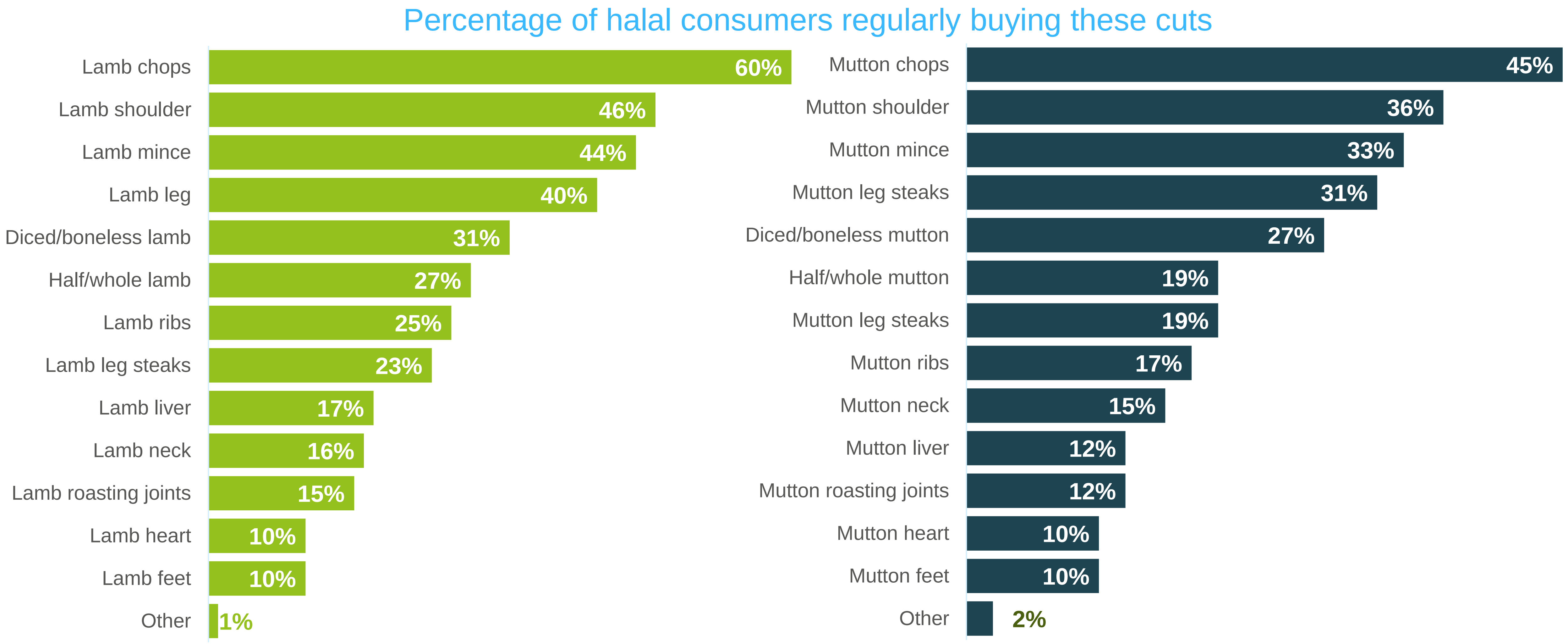
Halal consumers are much more likely to eat lamb weekly

Percentage of consumers eating weekly



Source: AHDB – Demand for halal meat report 2020 *nationally representative sample including halal consumers

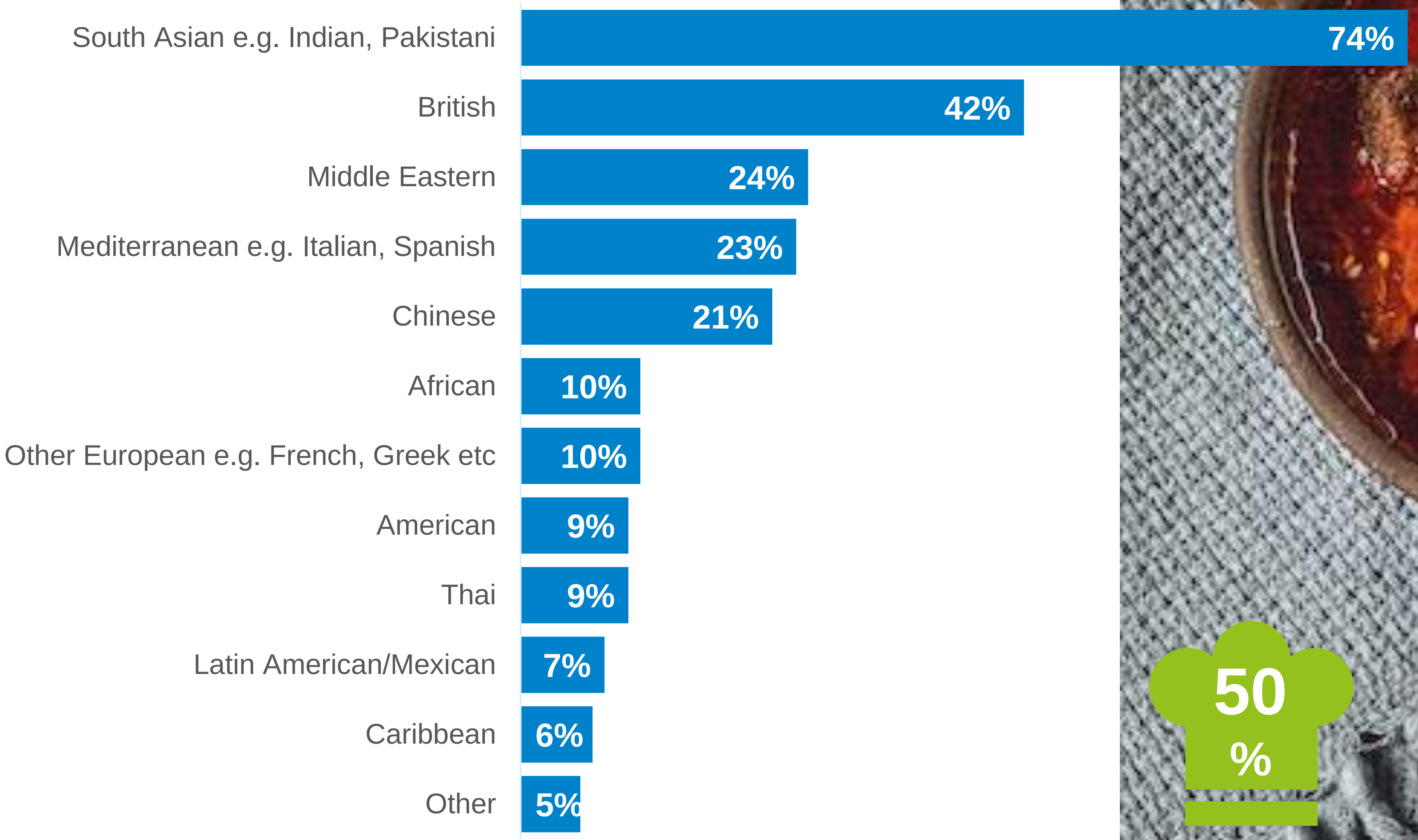
Chops, shoulder and mince are the preferred cuts for both lamb and mutton



Source: AHDB – Demand for halal meat report 2020

More than three quarters of halal consumers agree meals times are important occasions for family

Percentage of halal consumers who enjoy cooking these cuisines



Source: AHDB – Demand for halal meat report 2020

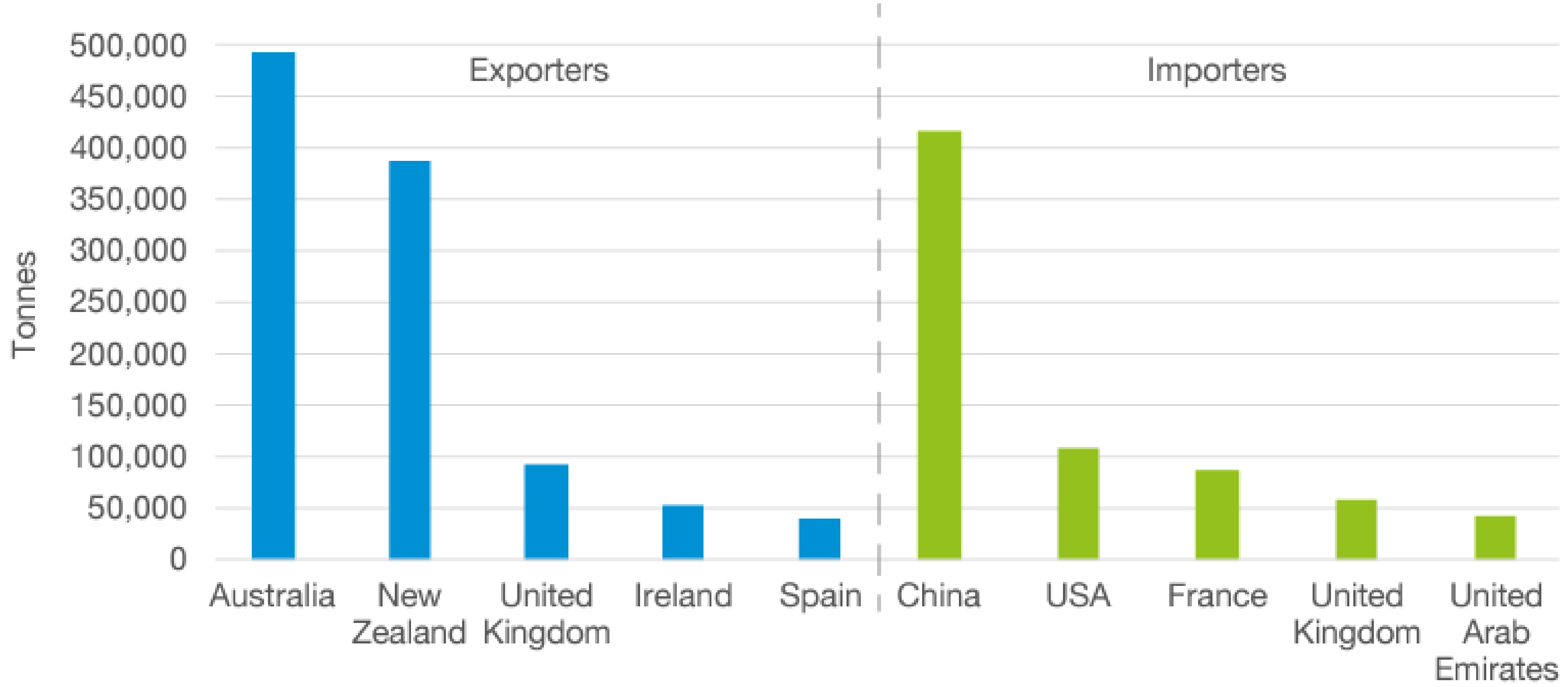
301%

increase in the volume of UK lamb exported to the Middle East

from animals that were stunned prior to slaughter, in compliance with the relevant halal standards in the Middle East

Source: AHDB – Opportunities for the sheep sector report 2021, HMRC between 2018 and 2019

The UAE is the fifth biggest importer of sheep meat



Source: FAO 2019

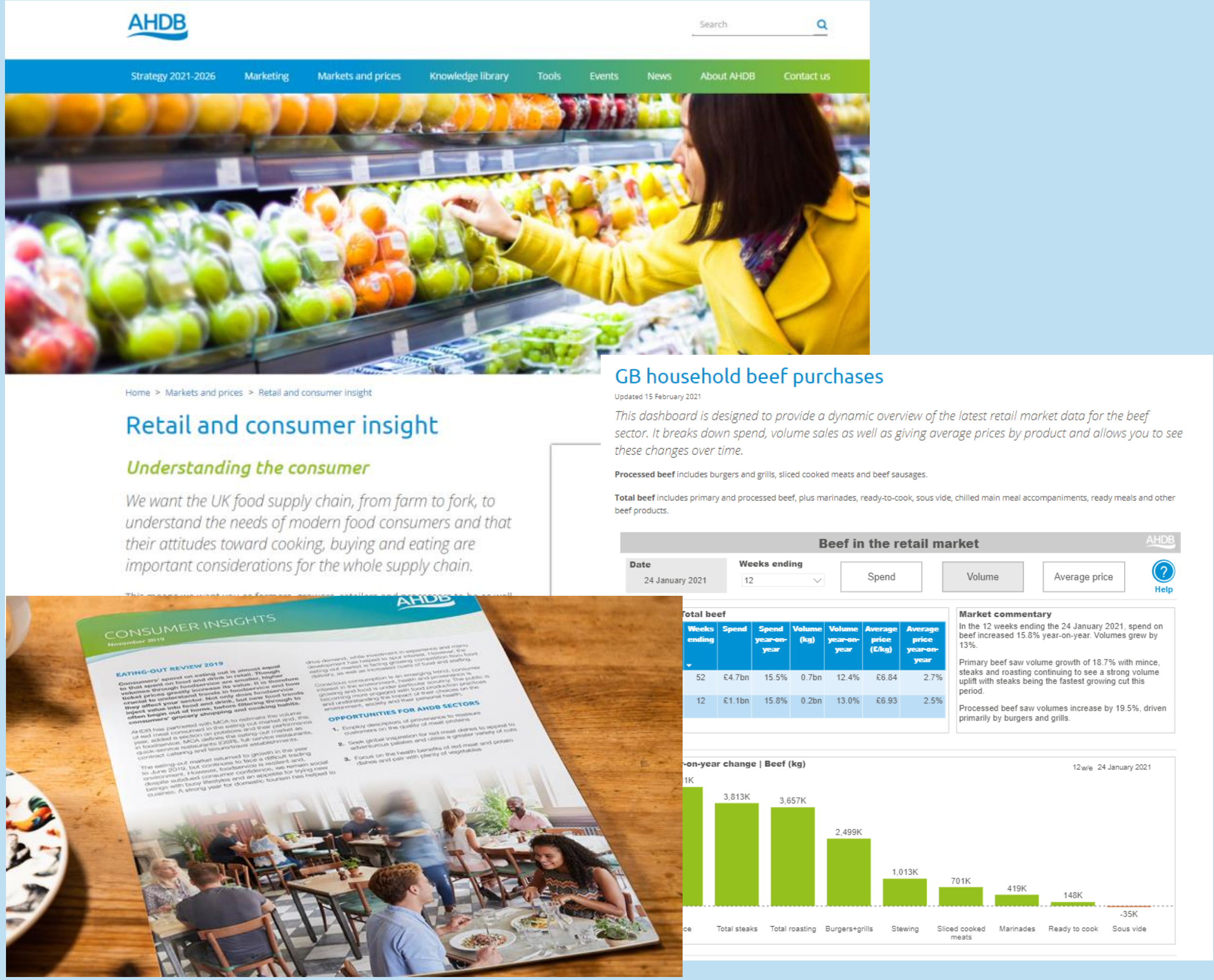
Source: AHDB – Opportunities for the sheep sector report 2021

Africa and Asia are expected to see the biggest growth in demand for sheep meat in the next 5 years

Source: AHDB – Opportunities for the sheep sector report 2021

Where can you find out more?

Our website
ahdb.org.uk/consumer-insight



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