

May 2024

The lamb shopper profile

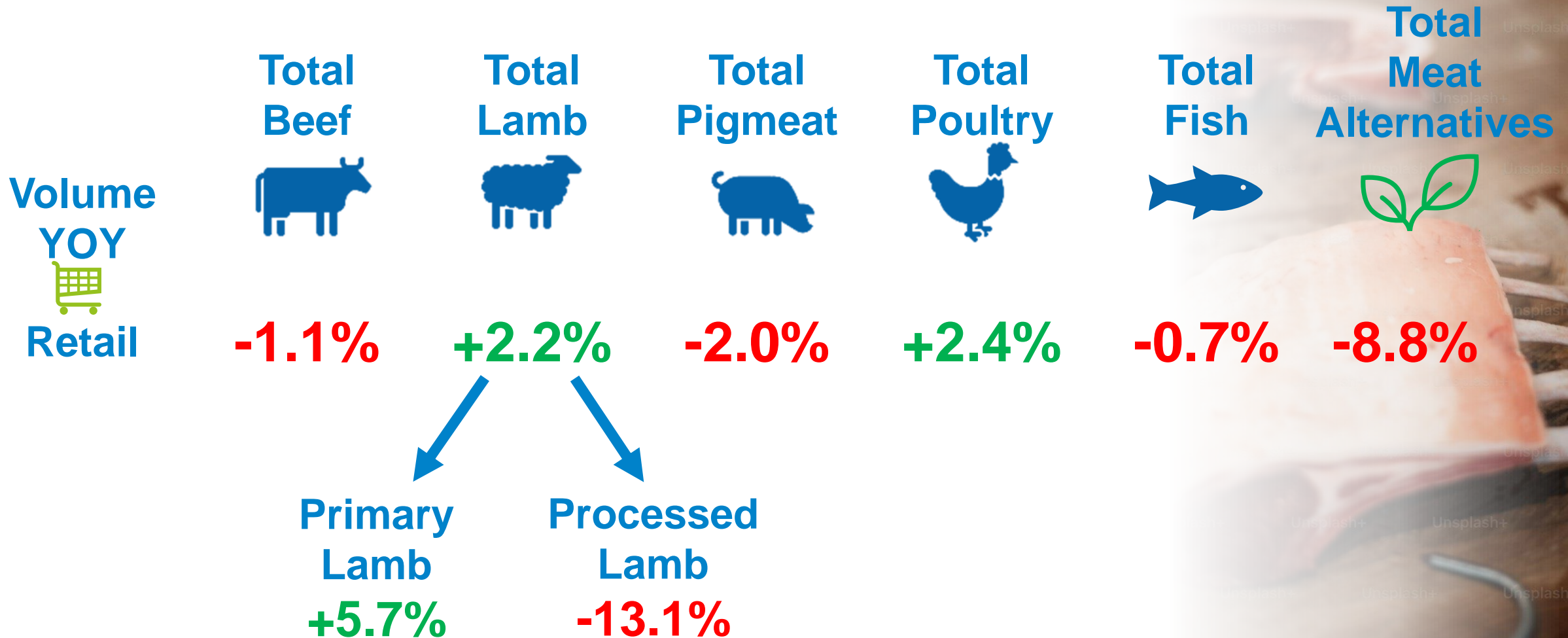
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BEEF & LAMB

Primary lamb volumes grew YoY in 2023 and have continued to grow this year



Lamb's price has fallen and volumes in growth as a result – other factors are now driving demand

		Price per kg	YoY Change
	Total Fish	£11.69	+3.3%
	Total Lamb	£10.48	-3.2%
	Total Beef	£8.77	+6.8%
	Total Pigmeat	£7.20	+6.0%
	Total Chicken	£6.05	+3.2%

Due to volumes on promotion growing 29.4% YoY and most being temporary price reductions



Growth in lamb is driven by increasing trip volume as well as an increase in buyers



Household penetration	Buyers	Shopping frequency	Trip volume (kg)	Total volume (kg)	Average price (£/kg)	Spend
40.8%	11.8m	2.7	0.7	23.2m	£10.48	£243m

0.4
%

1.1
%

0.9
%

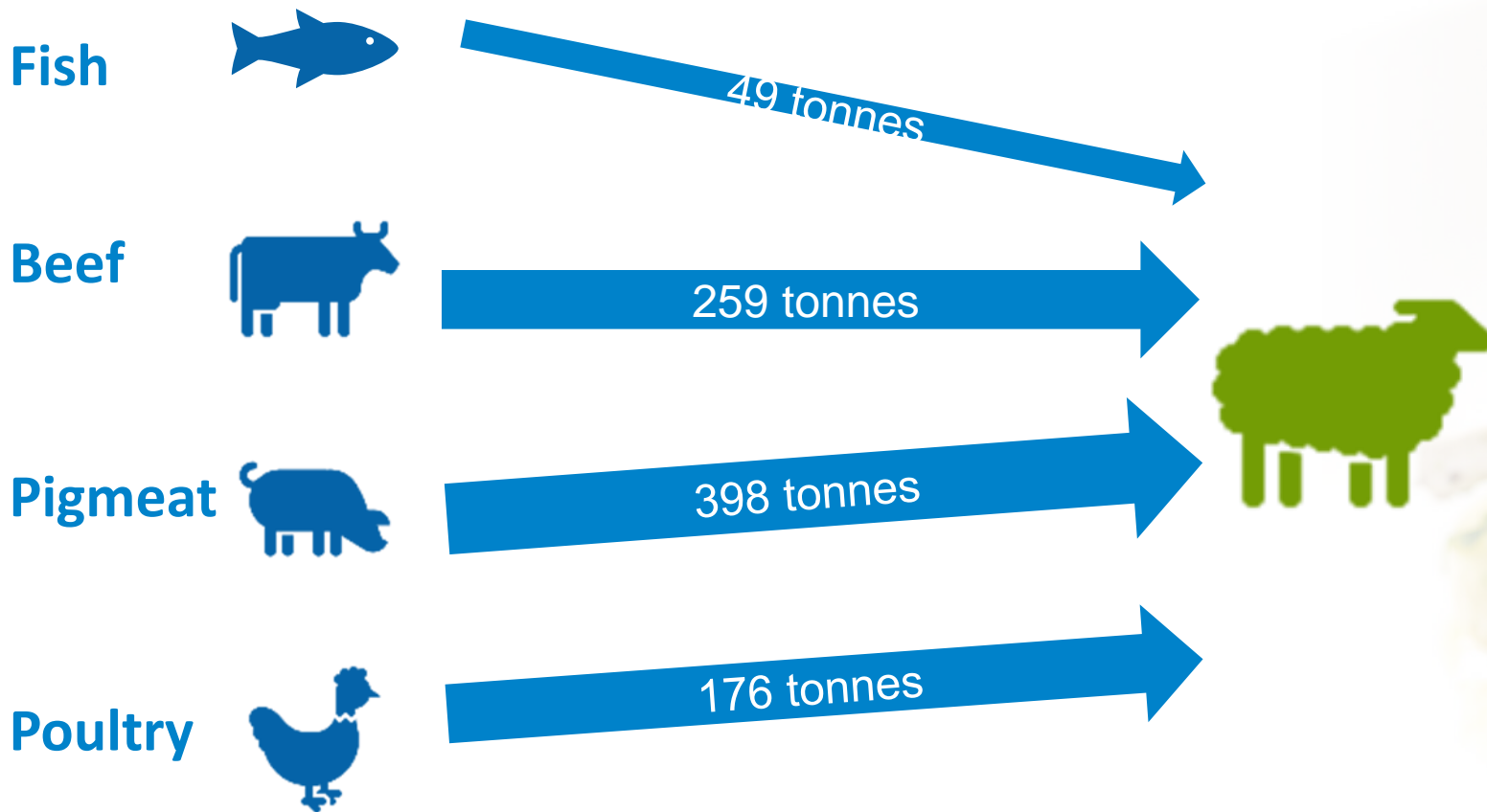
2.0
%

8.2
%

3.2
%

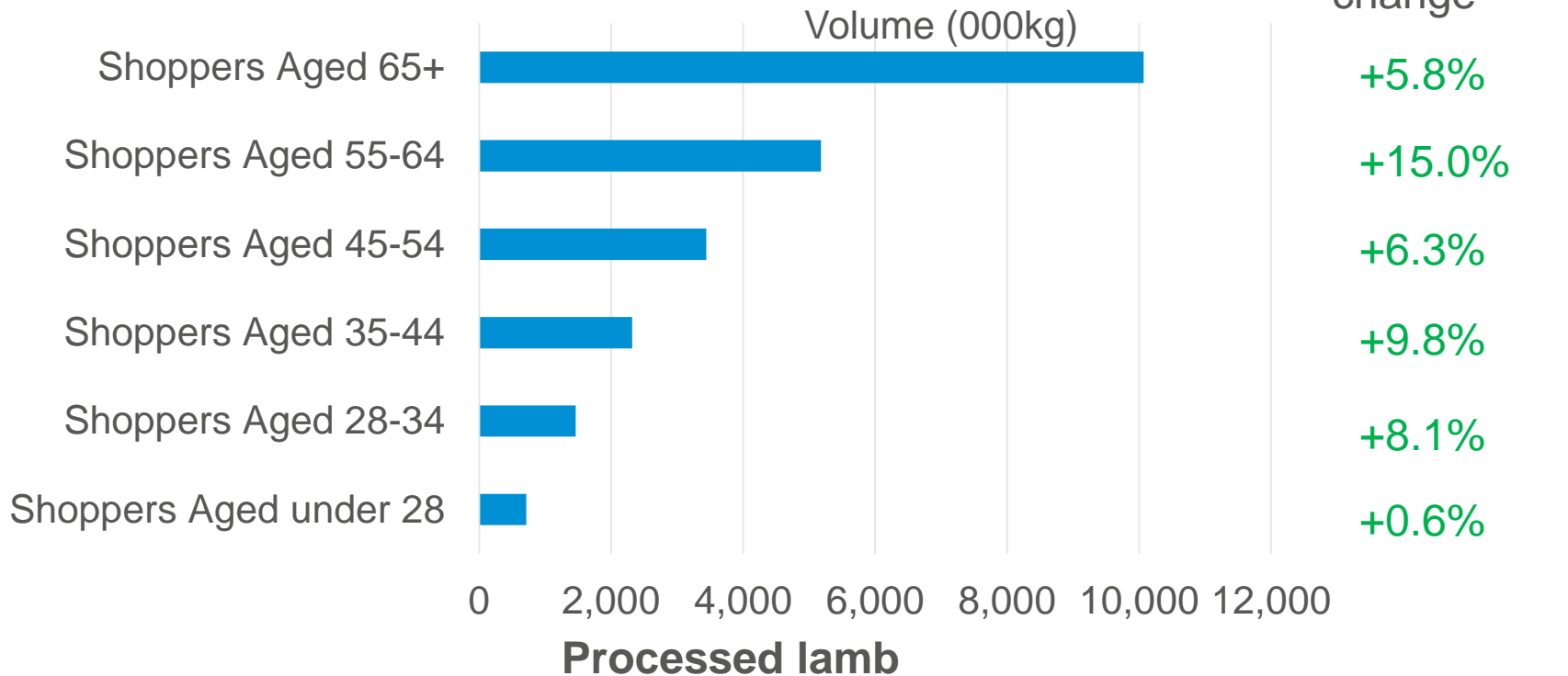
4.7
%

Most growth in lamb is coming from switching as shoppers move from all other proteins!



Growth is coming from all age groups but older demographics in particular

Total lamb volumes by age group



Social class

More well off consumers account for just over half (52.8%) of all lamb volumes...

... but those who are less well off have seen a larger volume growth YoY at 13.4% versus just 3.9%

12%
Shoppers 65+

49%
Shoppers 45-54

All life stages are increasing volume but new shoppers are older demographics



Pre-family



-3.4%



9.7%



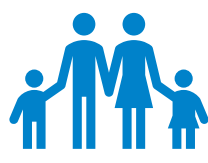
Young family



-7.0%



18.5%



Middle family



2.6%



6.9%



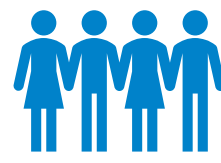
Older family



-1.2%



12.0%



Older dependents



5.0%



14.6%



Empty nesters



1.7%



6.7%



Retired



2.6%



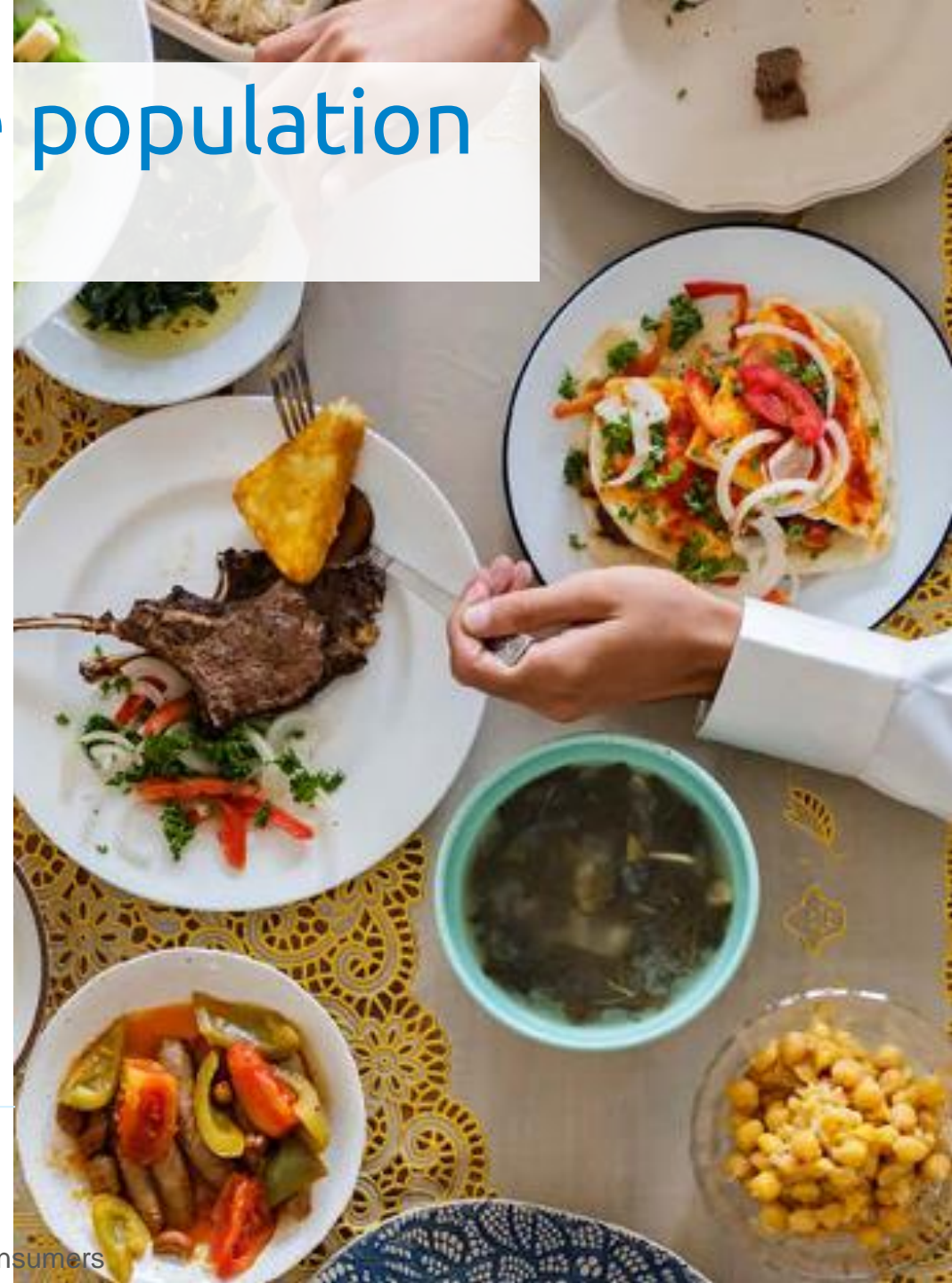
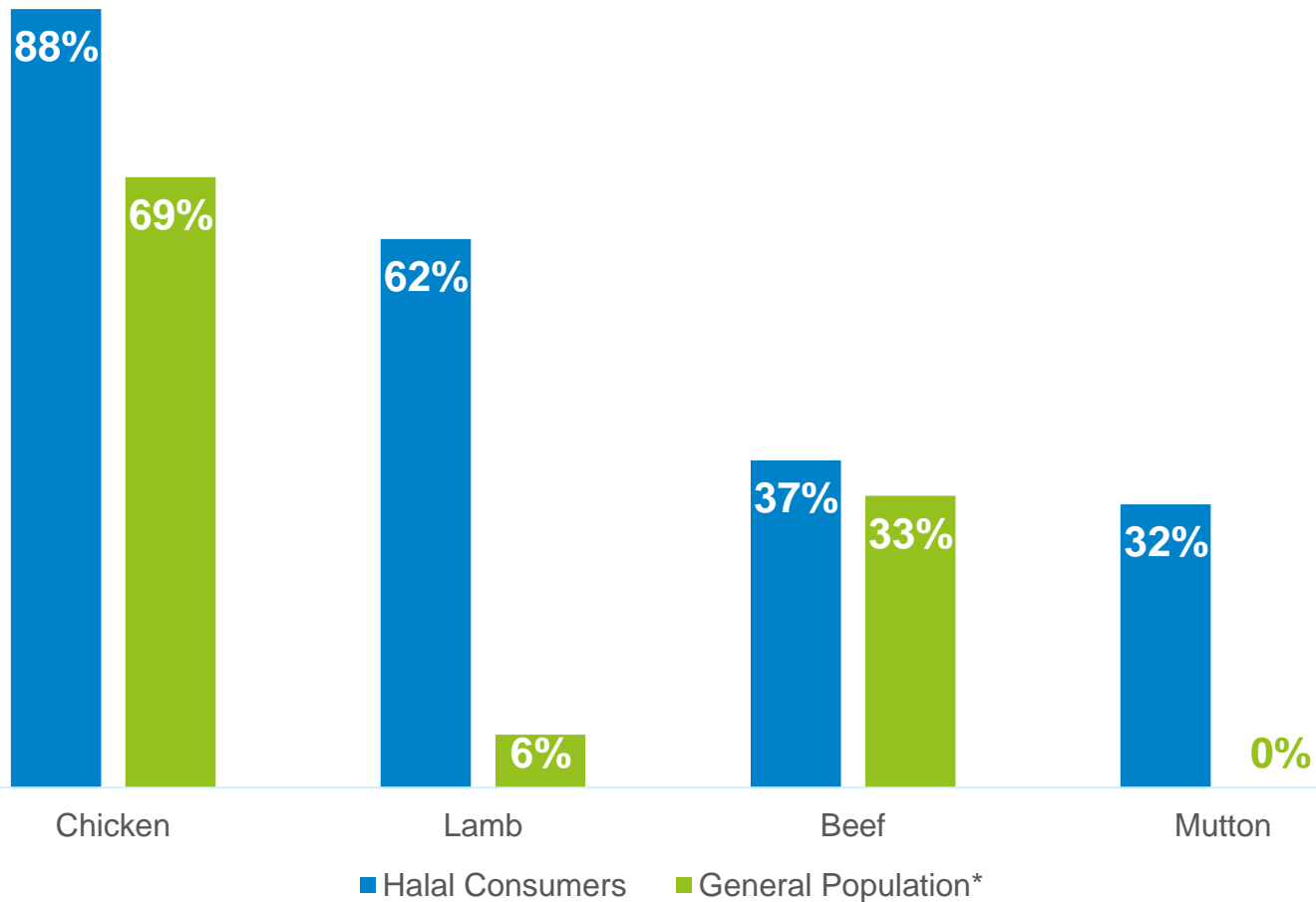
1.5%

Buyers

Volume per buyer

Muslims account for 6% of the population but 20% of lamb consumption

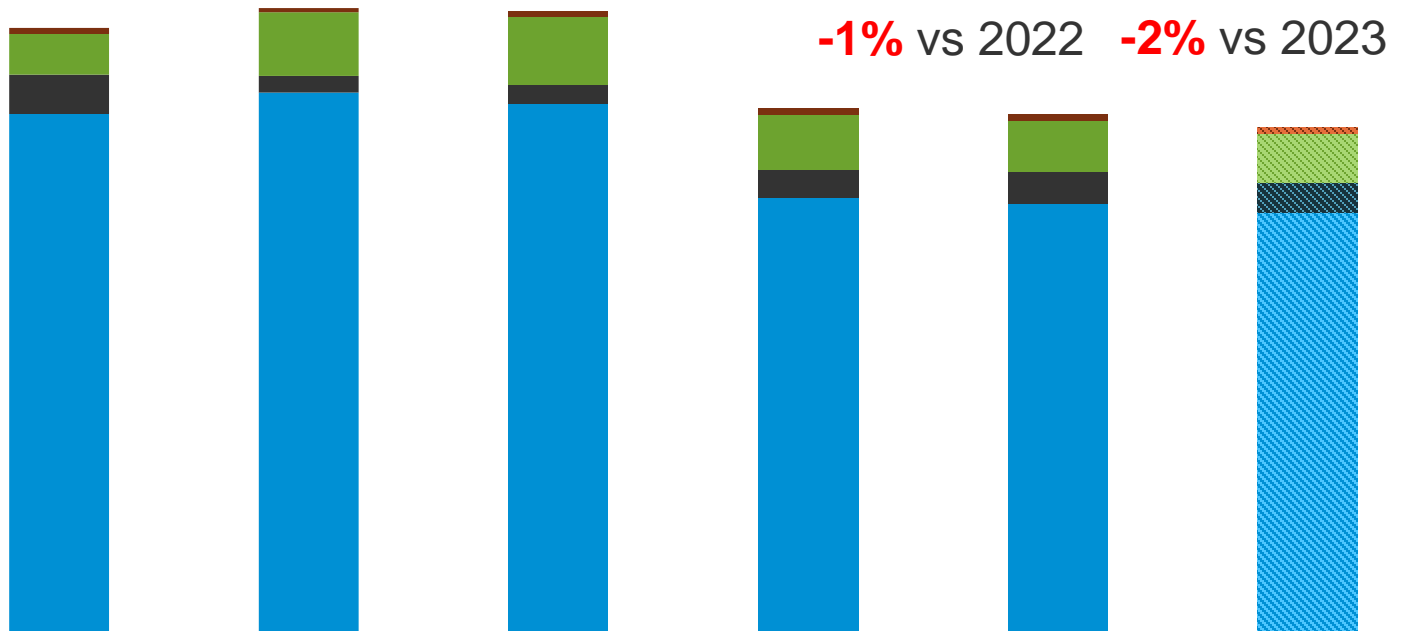
Percentage of consumers eating weekly



2024 lamb outlook prediction – volumes expected to decline YoY

Lamb Volumes

-14% vs 2019 -16% vs 2019
 -1% vs 2022 -2% vs 2023



2019 2020 2021 2022 2023 2024*
 *AHDB estimate as of January 2024

Source: AHDB

■ Retail ■ Eating-out ■ Takeaway/Delivery ■ Catering

Key influencing factors:



- Falling inflation
- Rising wages



- Prices still rising
- Stagnant economy
- World conflicts

There will be an update to the lamb outlook coming in June

Lamb products and cow's dairy felt the love this Valentine's Day

Monday, 18 March 2024
 Does Valentine's Day still have a place in the hearts of shoppers? When questioned, just over a third of Brits said they were planning on celebrating this year (YouGov, January 2024). And while the majority of those celebrating were planning on doing so with a romantic partner, a significant proportion (16%) said they would celebrate with family and friends (YouGov, January 2024), suggesting that perhaps romance isn't the only driver of festivities for cupid's day.



Charlotte Forkes-Rees
 Retail and Consumer Insight Analyst
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Valentine's day fell on a Wednesday this year, and historically mid-week celebrations can be muted in comparison to those on a weekend due to busy lifestyles and work commitments. However, it was clear that shoppers still felt the love for the romantic holiday, as sales of flowers, cards and Valentine's gifting increased to £174 million this year (IQI Scantrack, Valentine's Gifting Categories, Total coverage inc. Discounters, 24th 17 February 2024).

Meat, Fish and Poultry performance
 Meat, fish, and poultry (MFP) are well associated with Valentine's Day, and this year saw improved performance compared to Valentine's Day 2023. Higher prices ensured that there was value growth, but increased demand for lamb and chicken also contributed to overall volume growth.



Beef steaks remain a firm favourite
 Earlier this year, we predicted that beef steaks would be a standout option for many celebrating. This was correct, as overall volumes purchased in the 2-wk 18 February celebratory period increased by 7.0% year-on-year, outperforming the total beef category which saw a slight decline.

Those who chose to indulge in steak this year seemed to be less constrained by budgets, as overall increases in purchases were driven by the more expensive cuts, with fillet, rump, and sirloin all seeing year-on-year increases. Shoppers switched into these more expensive cuts from rump steaks, which saw volumes purchased decrease by 14.3% year-on-year.

Rump and sirloin steaks were also seen to be featured heavily in many retailers' meal deal promotions. However, due to inclusions of butlers in many of these packs, they are classified as an added-value marinade, rather than primary cut. When looking at beef marinade performance for this Valentine's Day, volumes sold increased by 16.0% year-on-year. This volume increase came from both on and off promotion, which would indicate that new products may have played a part in this improved performance, and that promotions can be key in activating shoppers into different cuts.

You might also like



Meat and dairy outperform their plant-based alternatives in January

Dairy demand grew in January, and while meat volumes fell compared to a year ago, both meat and dairy outperformed their animal products.



Retail market and dashboards



Foodservice market and dashboards



Consumer Insights Newsletter
 March 2019
 ISSUE 11

Welcome to the latest edition of AHDB's Consumer Insights and Consumer Insight team.

Brexit may or may not be on the horizon but we have looked internationally this quarter to see which trends are affecting consumers in potential new export markets. We launched our range of Country Focus Reports at the Oxford Farming Conference in January. News of lifted bans on exports of red meat to China and Japan means this information is more important than ever to those wishing to sell products overseas.

AHDB Consumer Insight Conference - September 2019

Thank you

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