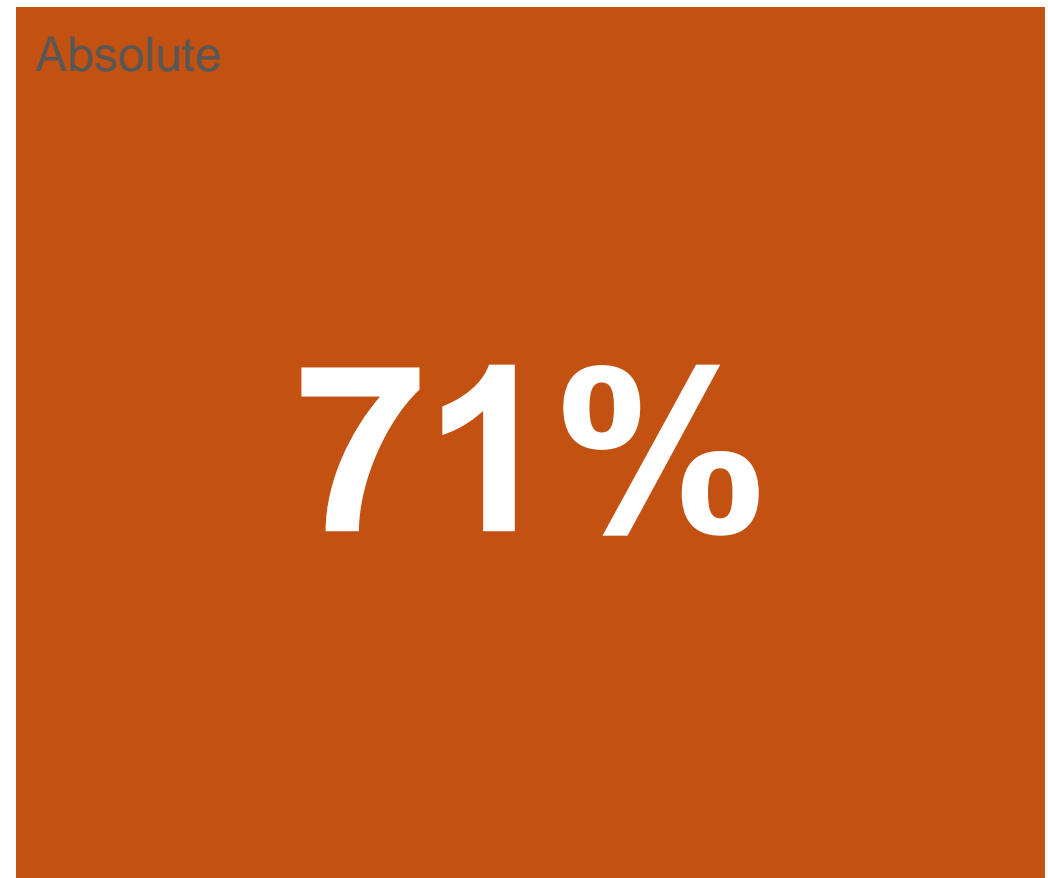


AHDB Summer Review 2024

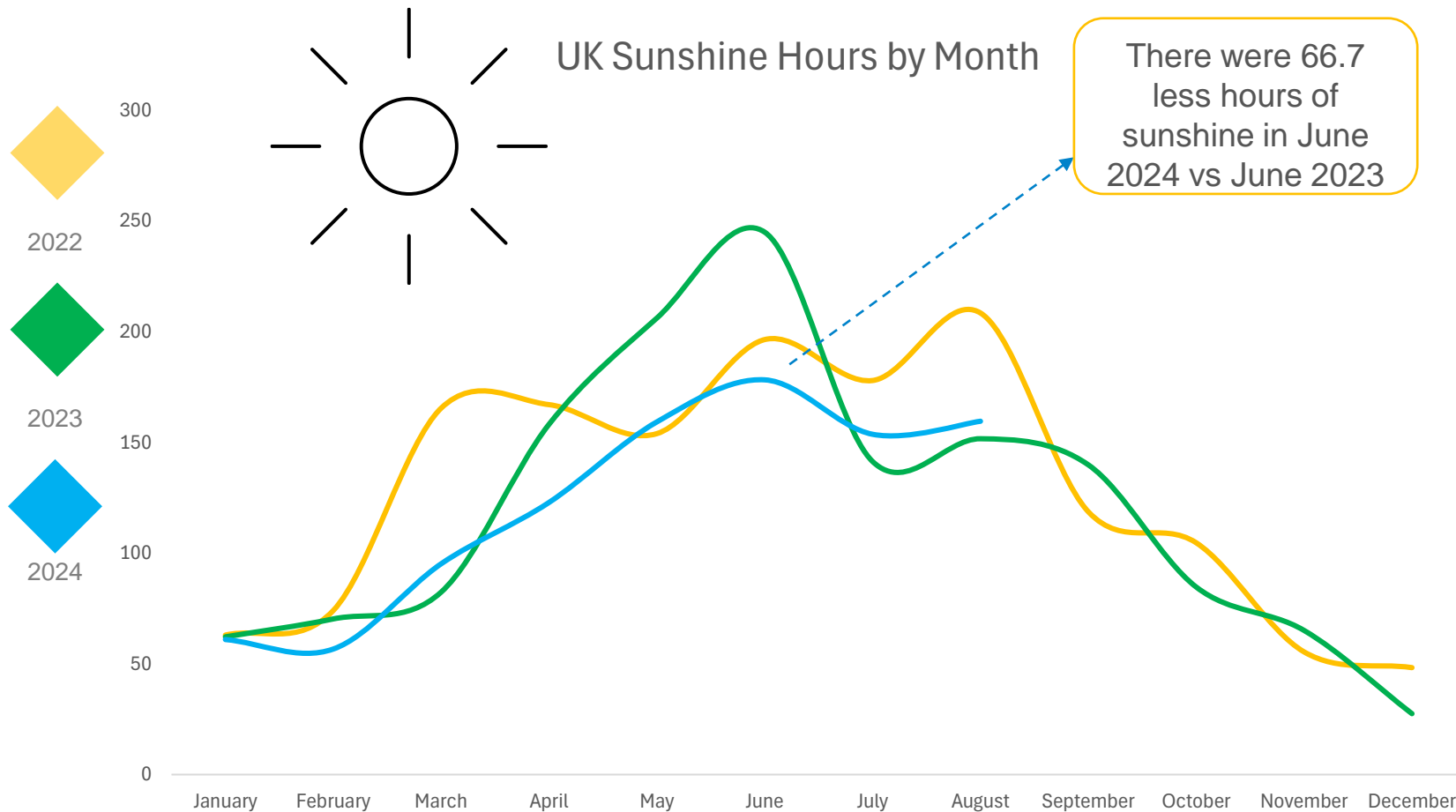
Tom Price – Retail and Consumer Insight Analyst

Versus last summer significantly fewer consumers are concerned about the cost of living...

How concerned are you about the following? Cost of living NET



The weather has been a wash out



News

The UK is set to get its coldest summer in 24 years



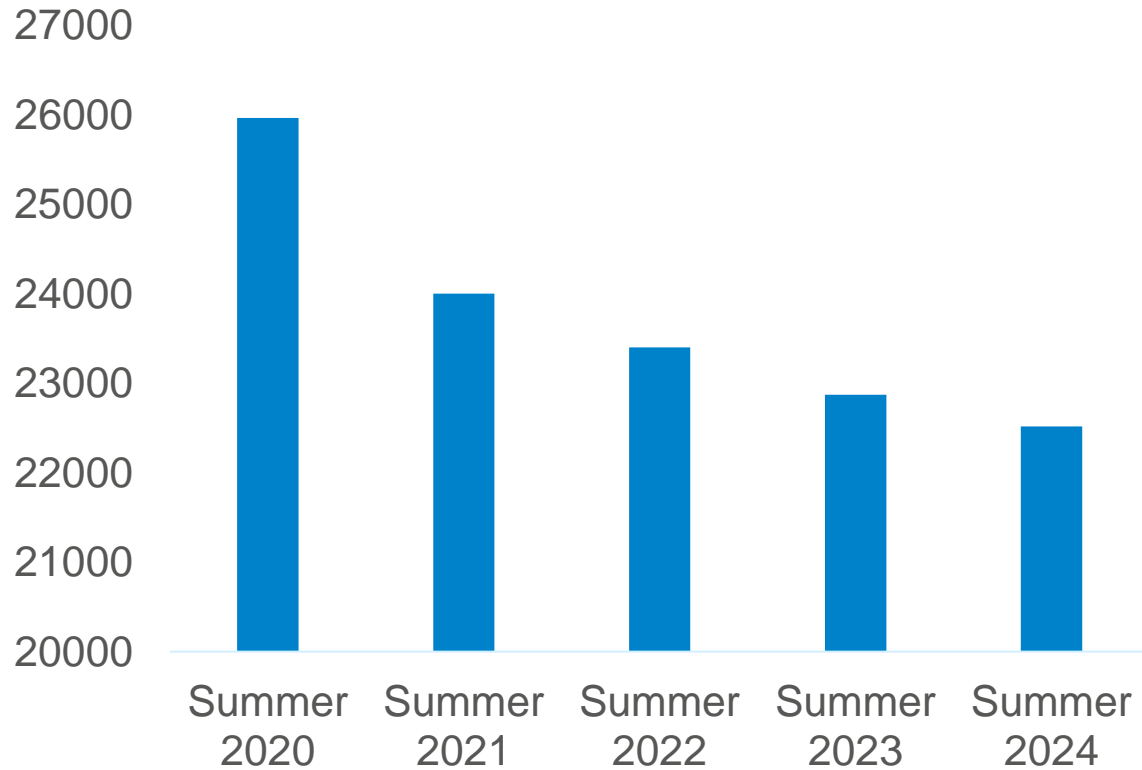
Home News UK

European Monsoon is on its way to make our summer even more miserable

In-home consumption through the Summer has been **AHDB** declining at a constant rate of 2% over the years, a possible result of the pandemic peak.

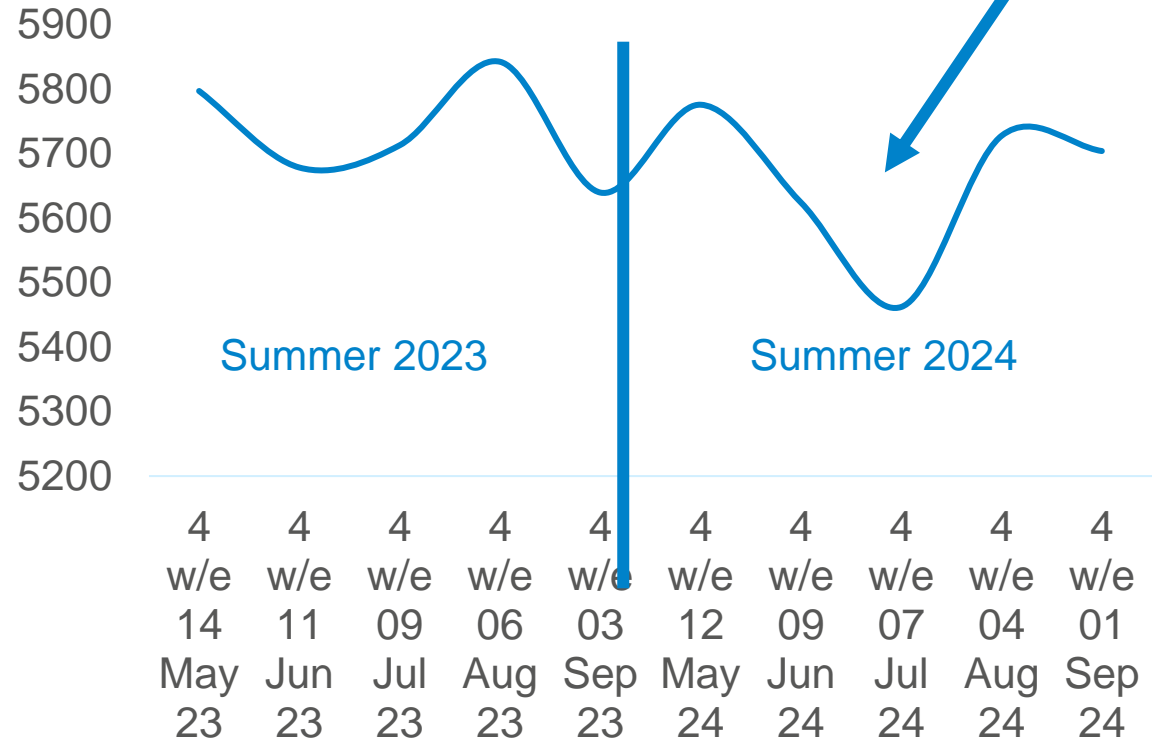


Consumption occasions in millions



In-home consumption dipped in June and July as more people went out to eat to make use of the warmer weather

Consumption occasions in millions



Consumers are more concerned about their Health and Fitness over the summer!

Health was at it's 3 year high this summer 27.9% share of servings (+1ppts YOY)

Breakfast was the driver of this trend 28.5% share of servings picked for Health (+2.1ppts YOY)

People were keen to start their day with adding

nutritional value to their diets this summer!



Consumers are still focused on quick to prepare meals

Speed was at it's 5 year high this summer 8% share of servings
(+0.8ppts vs 2020)

Whilst ease of prep saw a -0.5ppts decline YOY, it still accounts for a
15% share of servings

People now want **Quicker meals** than ever before
alongside the **nutritional value** this summer!

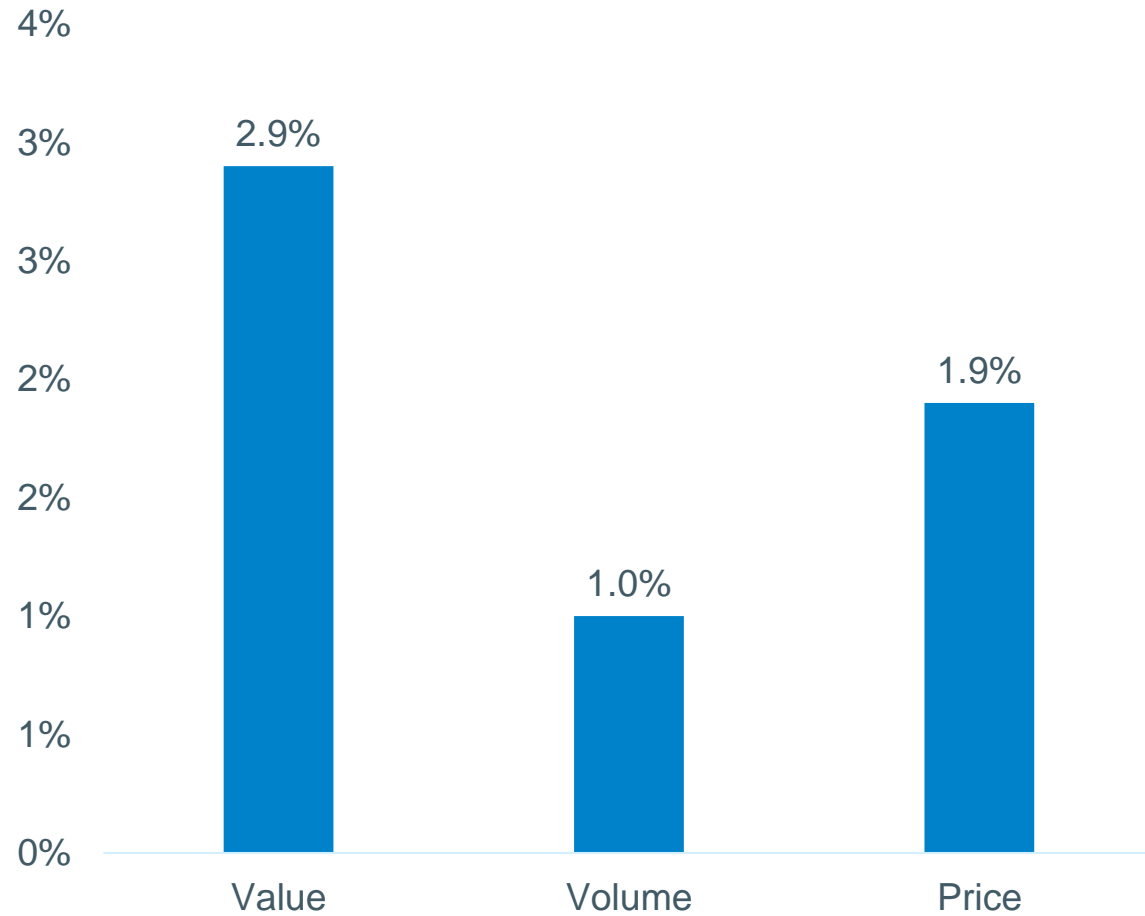


Retail performance



MFP has seen volume (and price!) growth this summer

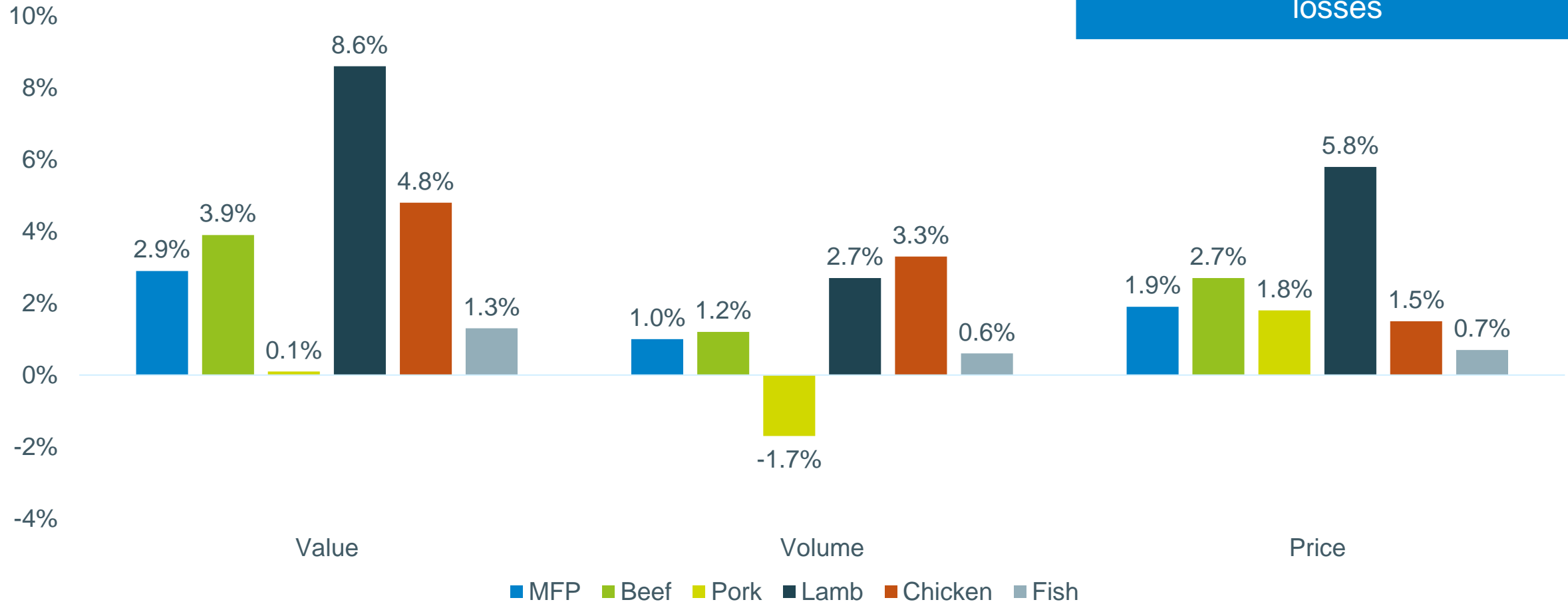
Summer MFP Performance



All proteins grew volumes apart from pork, chicken fastest

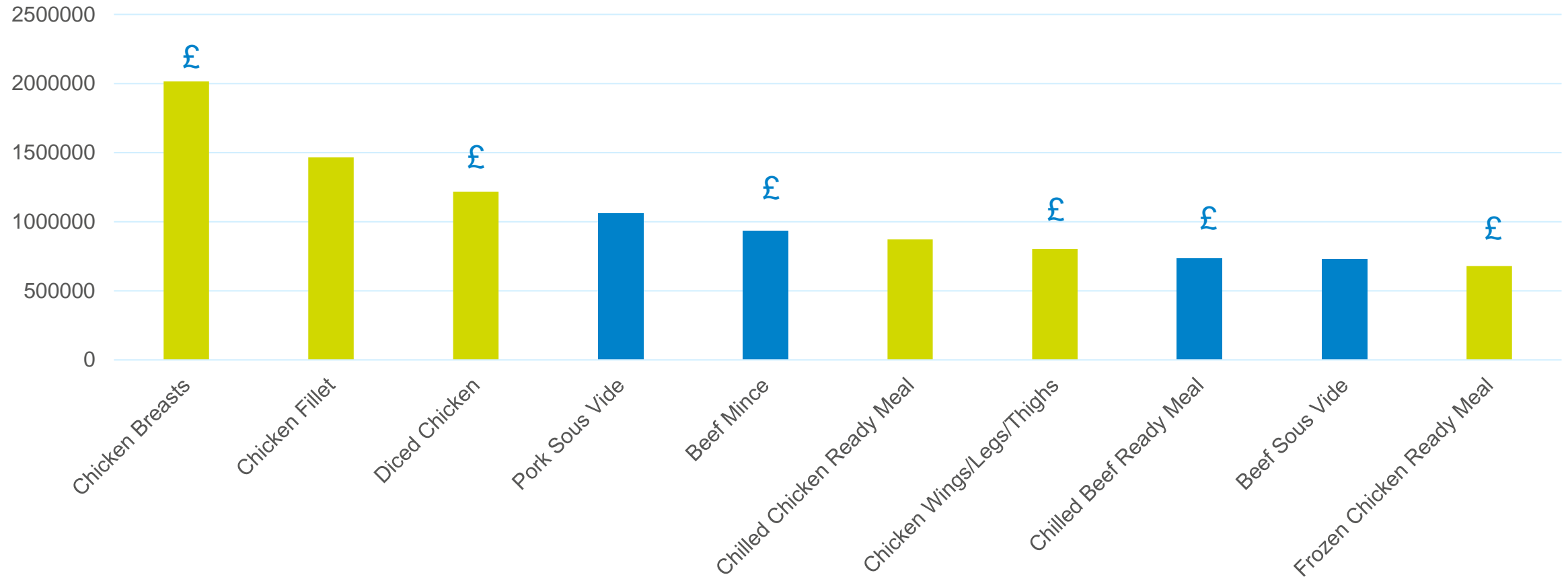
Meat-free has declined -0.8% this summer driven by penetration losses

Summer MFP Performance



When looking at actual volume growth 6 of the top 10 growing cuts are chicken ...and 6 of them are cheaper than the market average

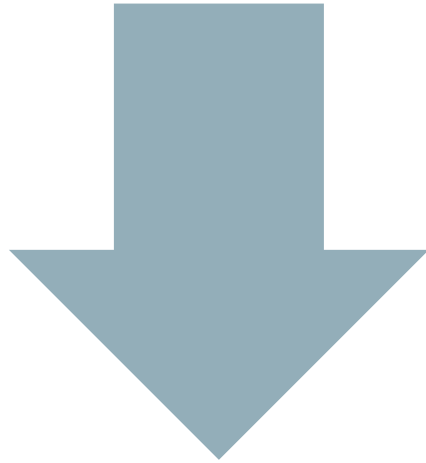
YoY actual vol change (kgs)



£ = cheaper average price than total MFP

Promotions have boosted the category this summer

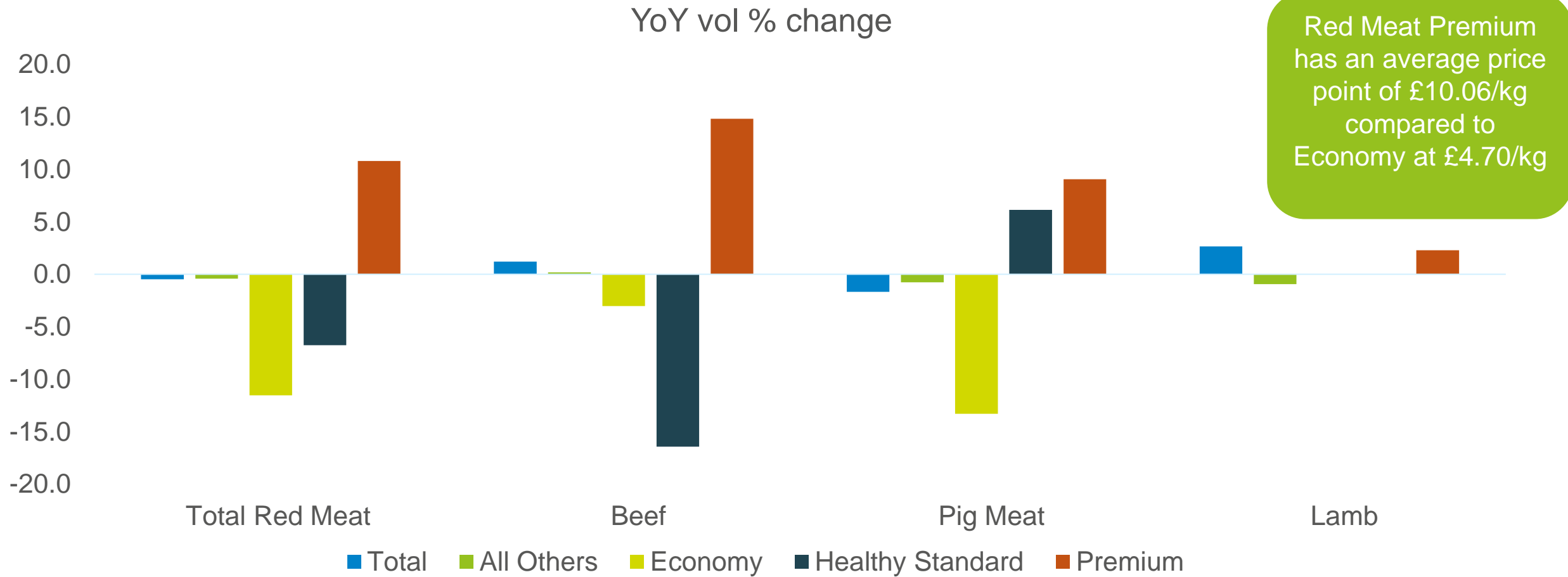
Off Promotion
-3.7%



On Promotion
+14.7%

With the exception of Lamb, every protein sees growth coming solely from on promotion

Across all red meats, Premium has been a tier showing **AHDB** strong growth ahead of cheaper tiers like Economy





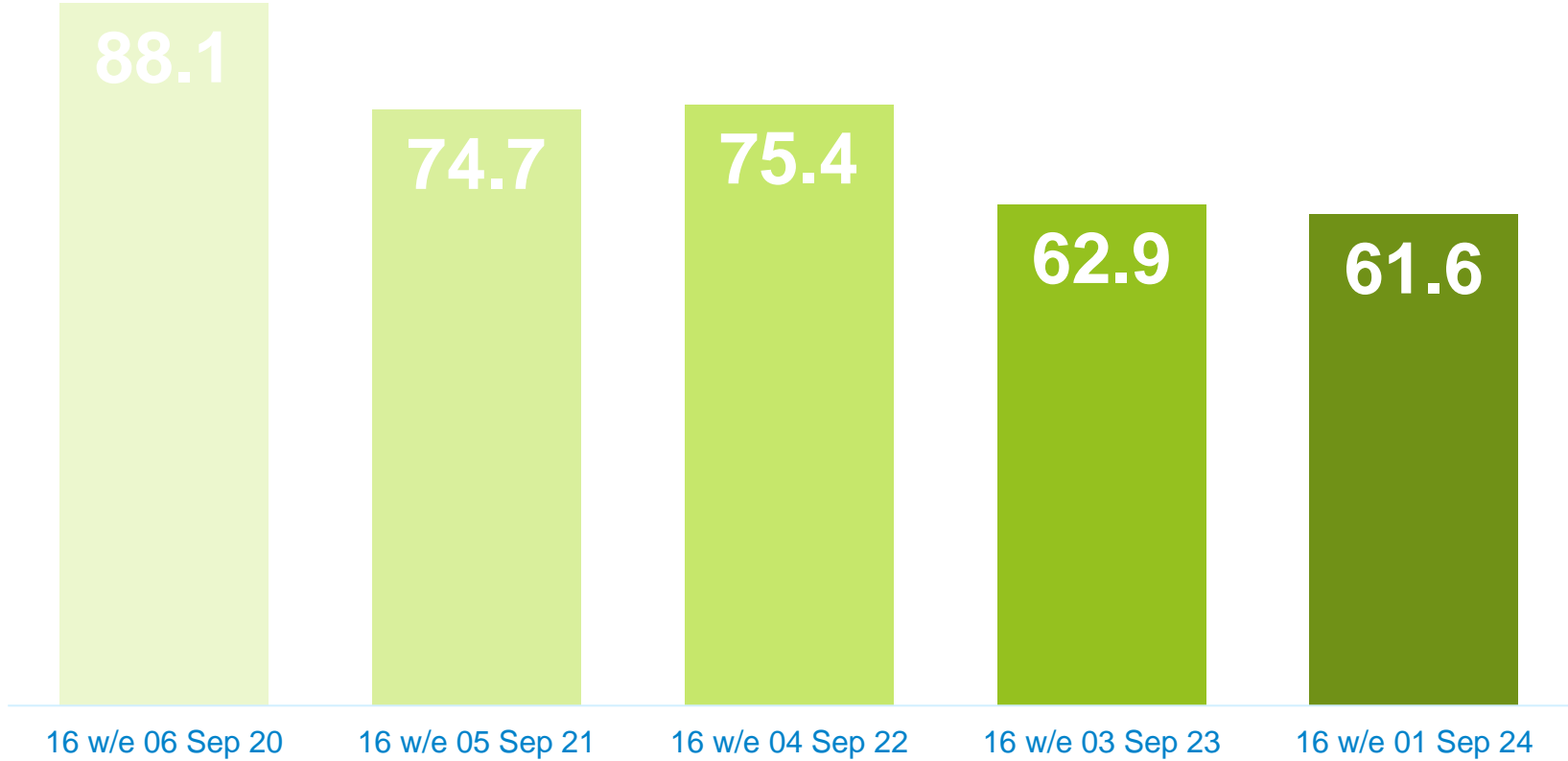
BBQ performance



BBQ occasions are on par with 2023 levels, but below the last few Summers



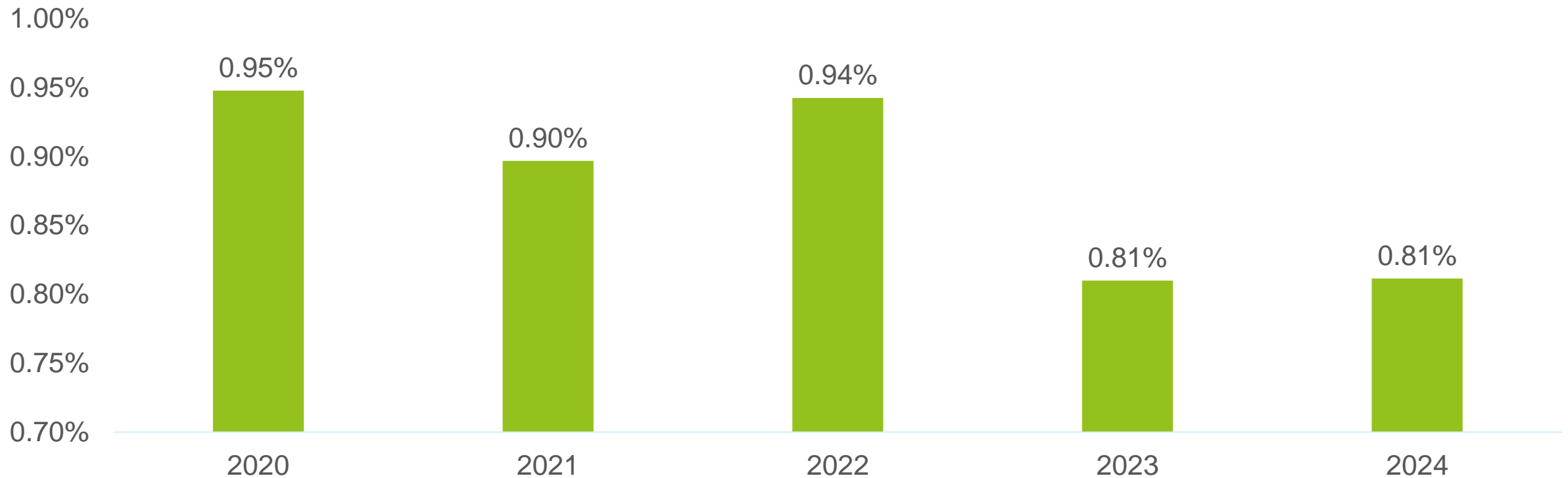
BBQ occasions (millions)



Source: Kantar Usage Panel // Millions of BBQ Occasions YoY until 16 w/e 01 Sept 24 // BBQ occasions (excl takeaway)

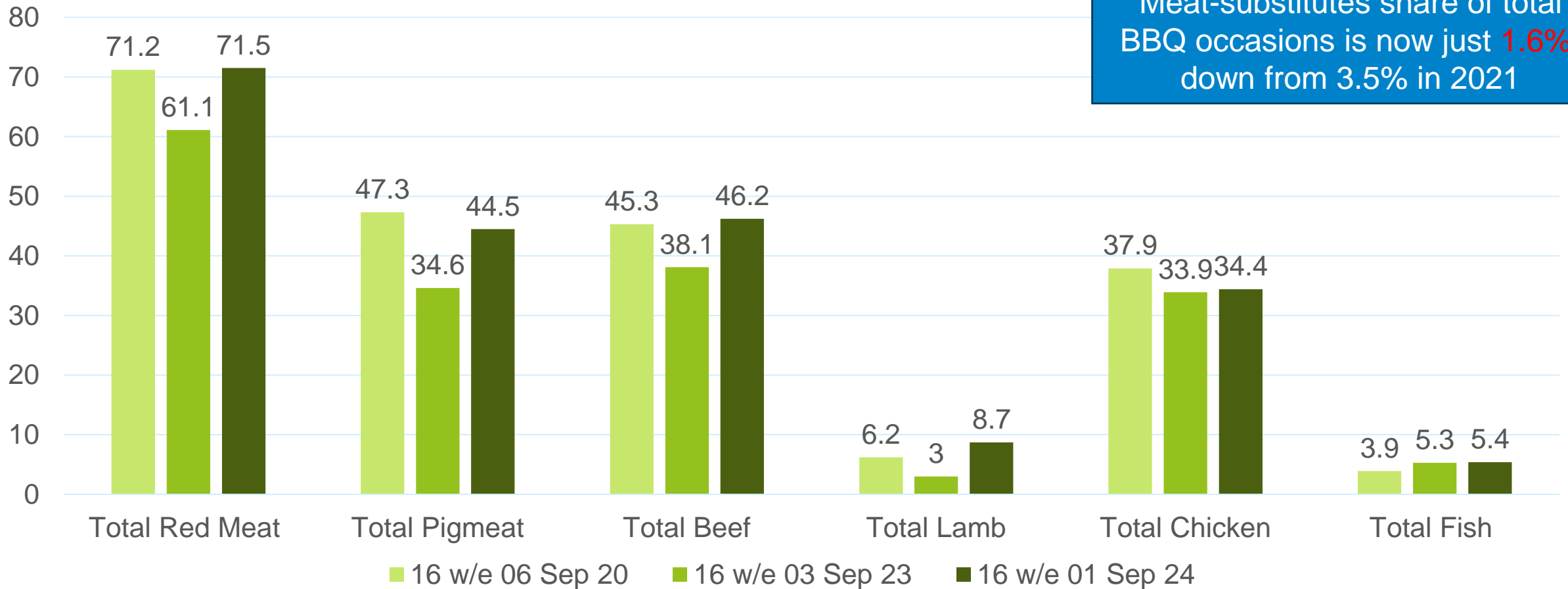
However, BBQs only make up a small proportion of total lunch and evening meal occasions

% share of BBQ occasions of Lunch/Evening meal occasions



Red Meat share of BBQs has been boosted by burgers and grills, sausages and steaks

Share of Total BBQ Occasions (%)



Meat-substitutes share of total BBQ occasions is now just **1.6%**, down from 3.5% in 2021

Summer

- It is not all about the BBQ cooking method! Make sure inspiration doesn't solely focus on this
- BBQ ranges are used beyond the BBQ...ensure awareness, inspiration and confidence to cook indoors
- Weather is unpredictable so communicate versatility of cuts if plans have to change

Red Meat

- Value for money continues to dominate – but value doesn't necessarily need to mean lower price point; communicate taste, versatility, health and sustainability
- Tactical support works but ensure inspiration when promotion gap
- Continue to push and innovate added value range