AHDB Consumer Insight Snapshot

Sliced cooked meats

A look at market trends and consumer shopping patterns within the sliced cooked meat market

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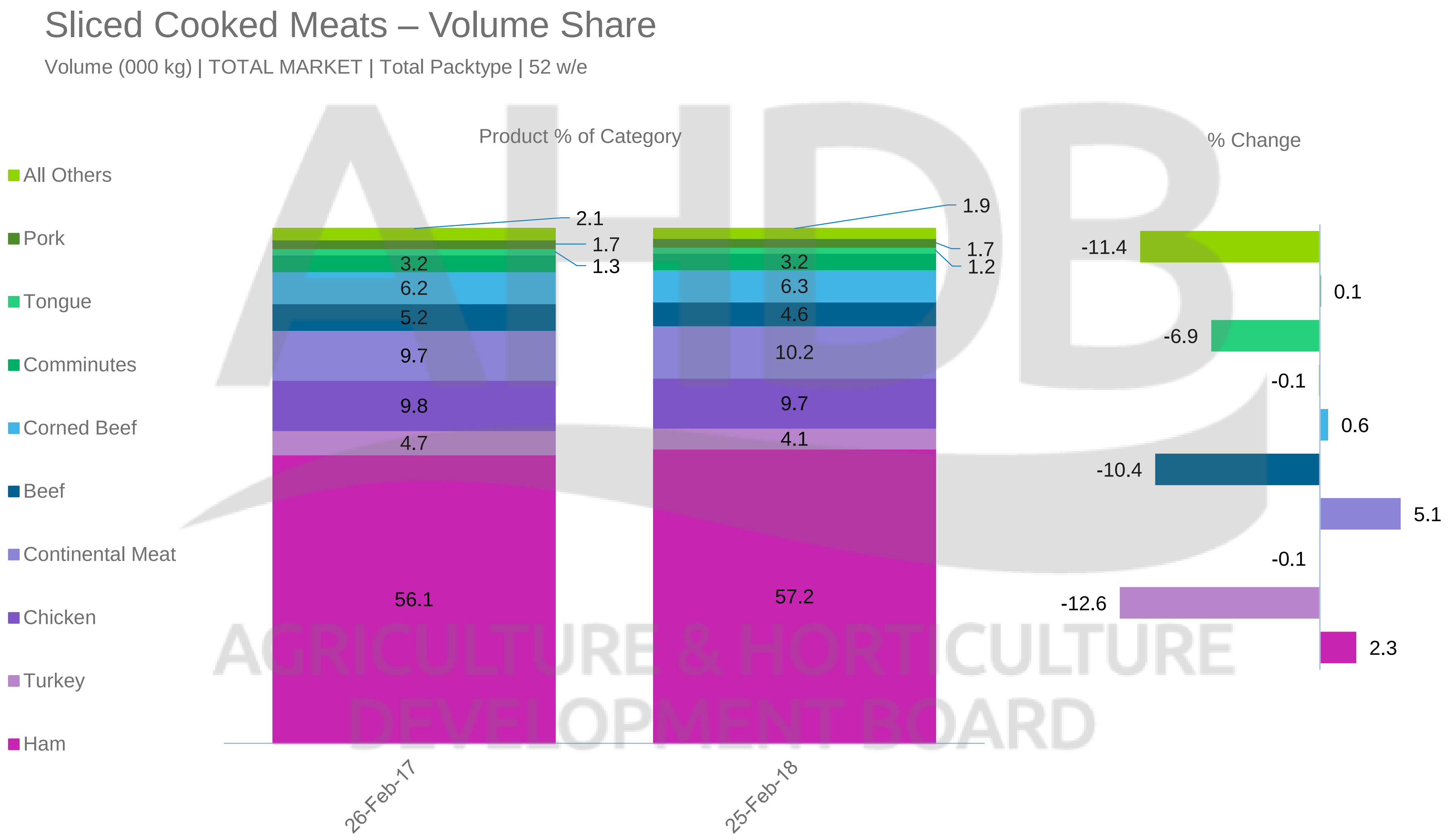
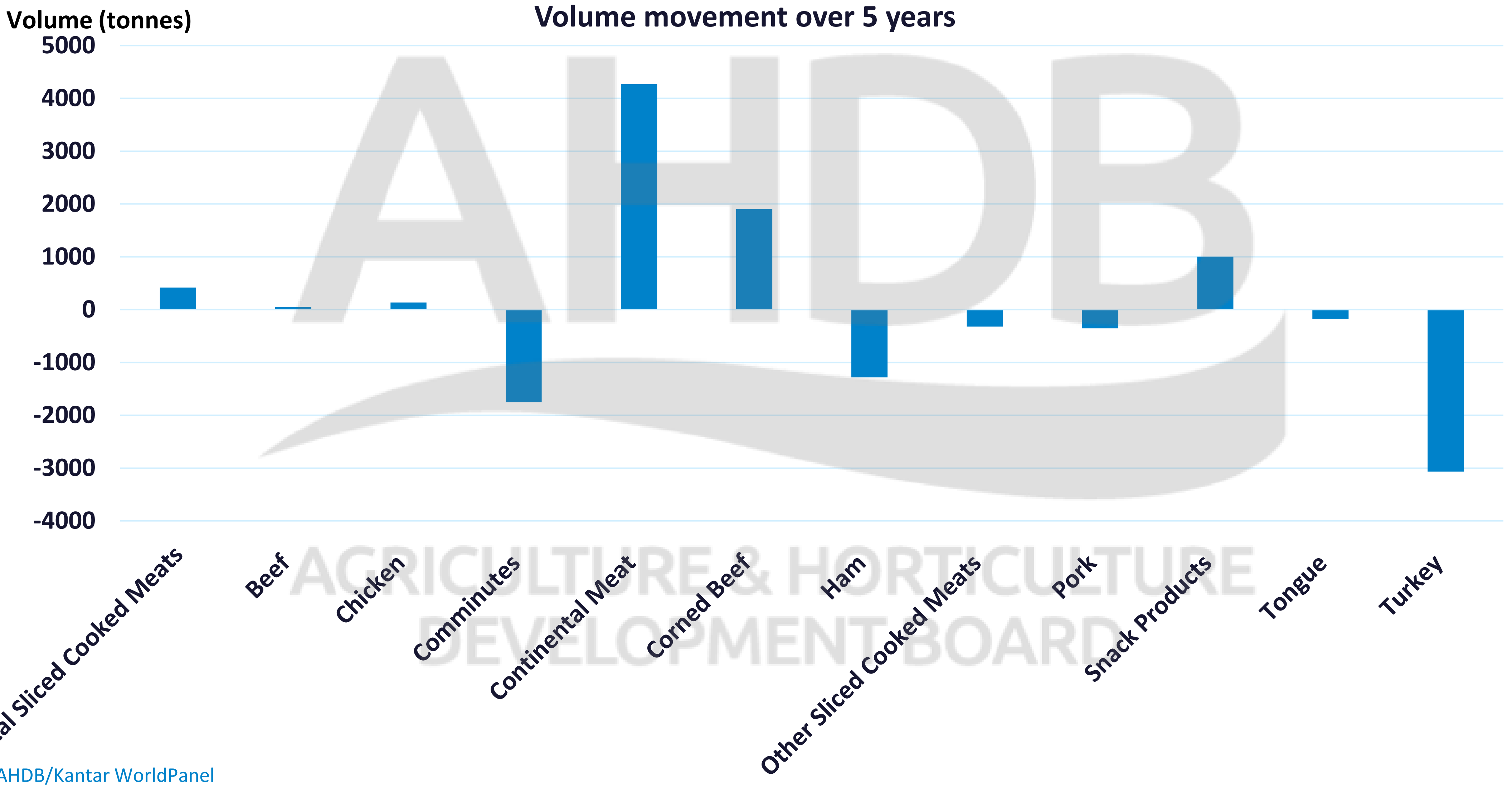
March 2018

Ham continues to hold the largest share, with the strongest growth coming from continental meats



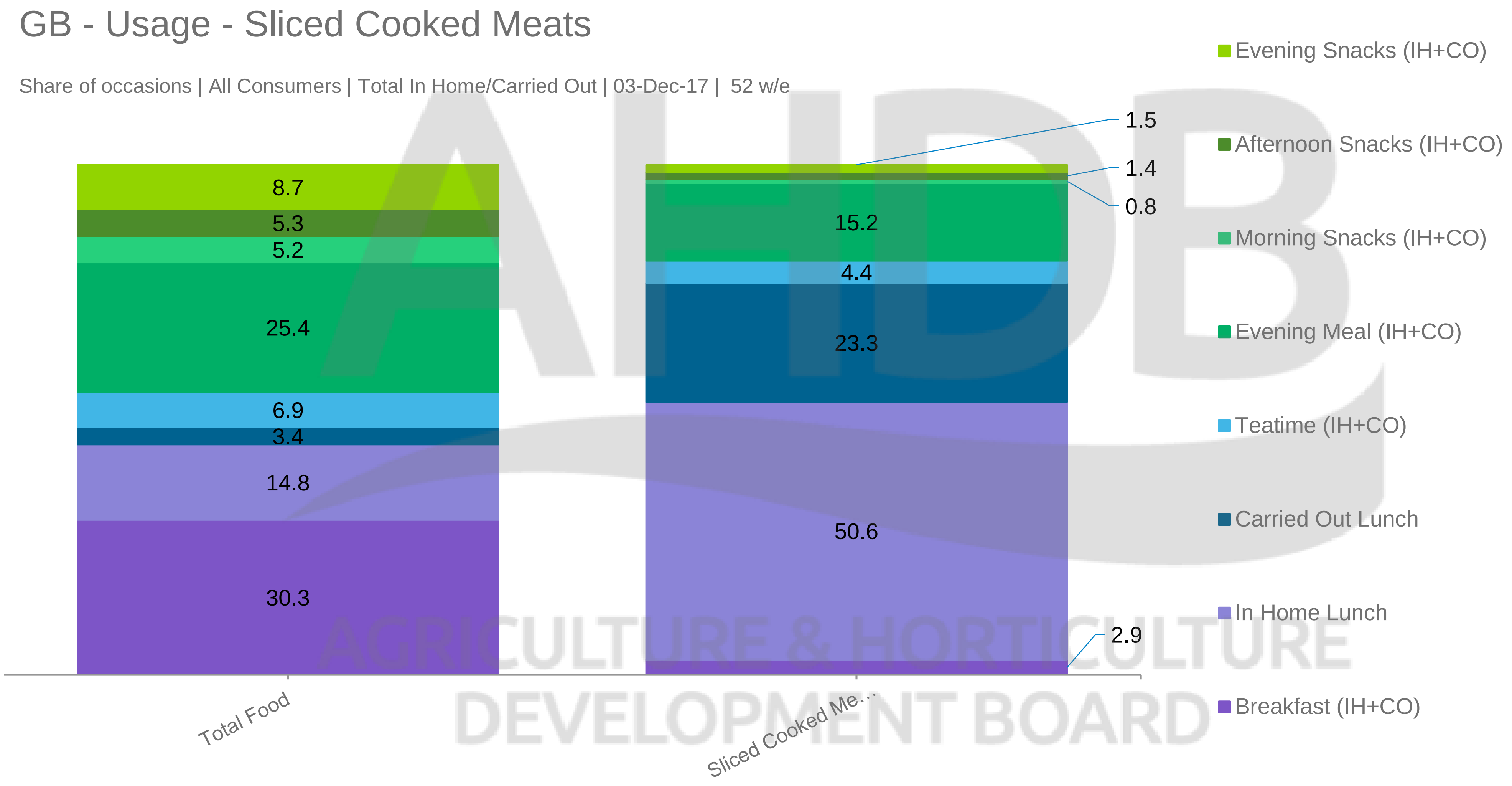
Source: AHDB/Kantar WorldPanel

Over the longer term there has been limited volume growth, but there have been some gains for continental meat: Parma ham and salami make up the majority of current continental meal volumes



Source: AHDB/Kantar WorldPanel

Cooked meats typically feature in home-based and carried out lunches and continental meats over-index at the evening meal occasion



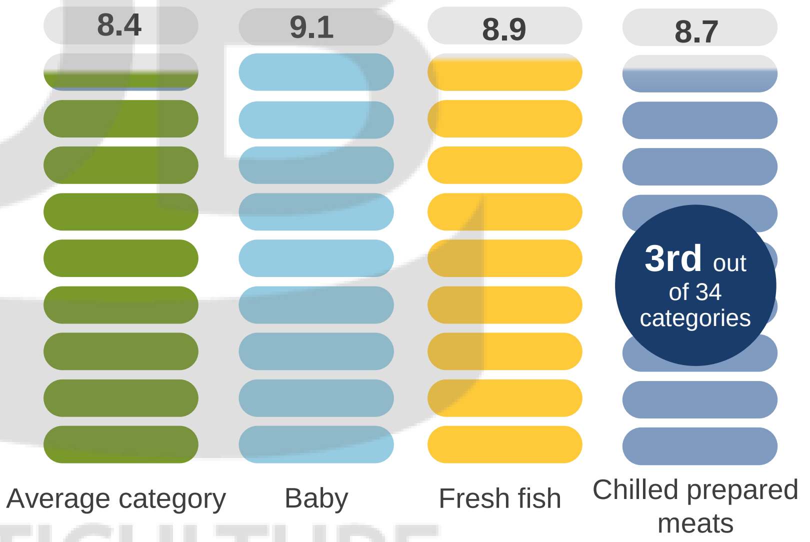
Source: AHDB/Kantar WorldPanel Usage

Quality is important to shoppers – using a range of mechanics to communicate this could help convert shoppers

IGD's category benchmark report on chilled prepared meats highlighted the main reasons why shoppers agreed 'it is worth paying a little extra to get higher quality chilled prepared meats'

- Better taste
- Ethical
- Ingredients/less water
- New Products
- Brand/Premium private label
- Texture

Top categories – quality was important in purchase decision – mean score from 1 to 10



Source: AHDB/IGD Category benchmark chilled prepared meats July 2017

Base: 3,400 UK supermarket shoppers. Q. "How important were the following attributes in your selection process, where 1 is very low and 10 is very high?"

In-store environments that encourage shoppers to browse and make easy choices can provide strong opportunities

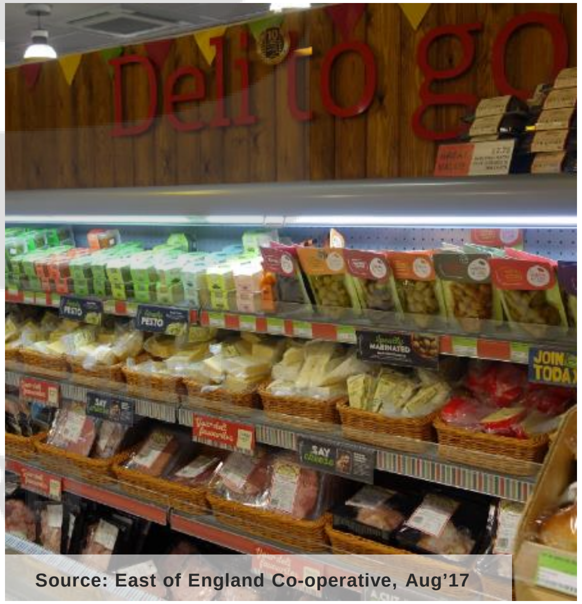
In-store examples – includes food-to-go in the 'deli' area to showcase chilled prepared meats.

Walmart (USA) are targeting busy shoppers – freshly sliced meats are located in a chiller in front of the deli, offering a 'grab and go' counter offering.

Sobeys, Canada, provides ideas for different uses of its traditional cooked ham: "enjoy in pasta and in omelettes, as well as on pizza".

Source: Walmart, USA, Mar'17

Source: Sobeys, Canada, Apr'17



Source: East of England Co-operative, Aug'17

Source: AHDB/IGD Category benchmark report 2017

Key considerations/future opportunities

- Little overall change in volumes - ham accounts for the largest segment, but there has been growth in continental meats

- Quality is important in chilled prepared meat and promoting the things that shoppers associate with quality could unlock further growth opportunities

- Ability to make easy/quick decisions at fixture is important, but consumers highlight that quality is also important. It’s Important the fixture encourages browsing and communicates key messages to shoppers.

Important to remember that sliced cooked meats are typically eaten for enjoyment and practicality – with the average preparation time at just under 12 minutes. Shoppers also have many different needs in this category – offering a strong range of pack sizes and meat types can help broaden the appeal.

Source: AHDB

www.ahdb.org.uk/consumerinsight

New health report June 2017

AHDB

CONSUMER INSIGHTS

June 2017

CONSUMER FOCUS: HEALTH

AHDB's consumer insight team actively tracks, monitors and evaluates consumer behaviour, reporting on the latest consumer trends and picking out what they mean for the industry and agriculture. Health is one segment which is rising in importance for consumers and Mintel report that 25.3% of all new product launches in 2016 had a health claim.

UNDERSTANDING OF HEALTH THROUGH THE EYES OF CONSUMERS

How important is health to consumers?

Food needs states*

Health 32%

Enjoyment 78%

Practicality 55%

Proportion of food servings in the home chosen for health reasons

2017 32%

+14% versus 5 years ago

Breakdown of servings chosen for health

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Consumer Insights

September 2017

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AGRICULTURE & HORTICULTURE DEVELOPMENT BOARD

Welcome to the latest edition of AHDB's Consumer Insights

Understanding consumers is essential to achieving success in any business and grocery retail is no exception. When UK shoppers buy food, price and quality are crucial factors but understanding other influences can add clarity on current market position and future opportunities.

The latest consumer focus report on 'young consumers' explores where the lifestyle choices of younger generations can differ from those before them and how age might not be the most significant factor influencing food decisions.

A wide range of food industry topics are examined in this newsletter. For example, price marked packs are reviewed, in particular the way in which clear price labelling has become more prominent in the time since promotion levels have dropped. Whether this approach has been successful with shoppers is considered. The food-to-go sector is in growth and our article describes how the offering has adapted to better meet the needs of the contemporary consumer.

The articles listed below cover themes from food packaging to eating out and provide an overview of some of our research during the past quarter.

Consumer Focus: Young Consumers

Consumers often retain the habits that they build up early on in life as they age. There is an argument that younger generations are living differently to the generations before them and it is therefore important that an understanding of young consumers' needs and attitudes is developed. They will form an increasingly important sector of the grocery market and will ultimately become the older generation of the future. According to ONS data young consumers between the ages of 18 and 34 account for approximately 22.5% of the total UK population. This report explores key areas in which young consumers' habits differ from the rest of the population and considers what challenges and opportunities this may pose for

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