



# Consumer Trends in Poultry

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Kantar Worldpanel



Take home  
grocery

30,000

households



Continuous scanning



Consumption

11,000

individuals



Online diary

Unparalleled  
continuous  
understanding of  
shoppers and  
consumers

# Agenda

**Current  
state of  
poultry in  
retail**

**Health: Threat  
or Opportunity?**

**How can  
poultry  
keep its  
share of  
the plate?**

**Volume**

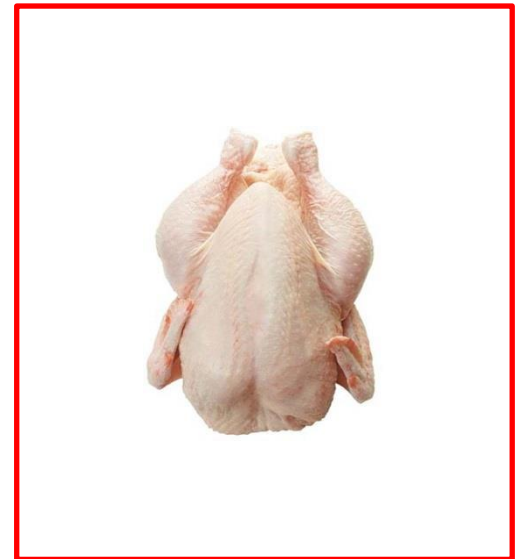
**+3%**

**Price**

**-4%**

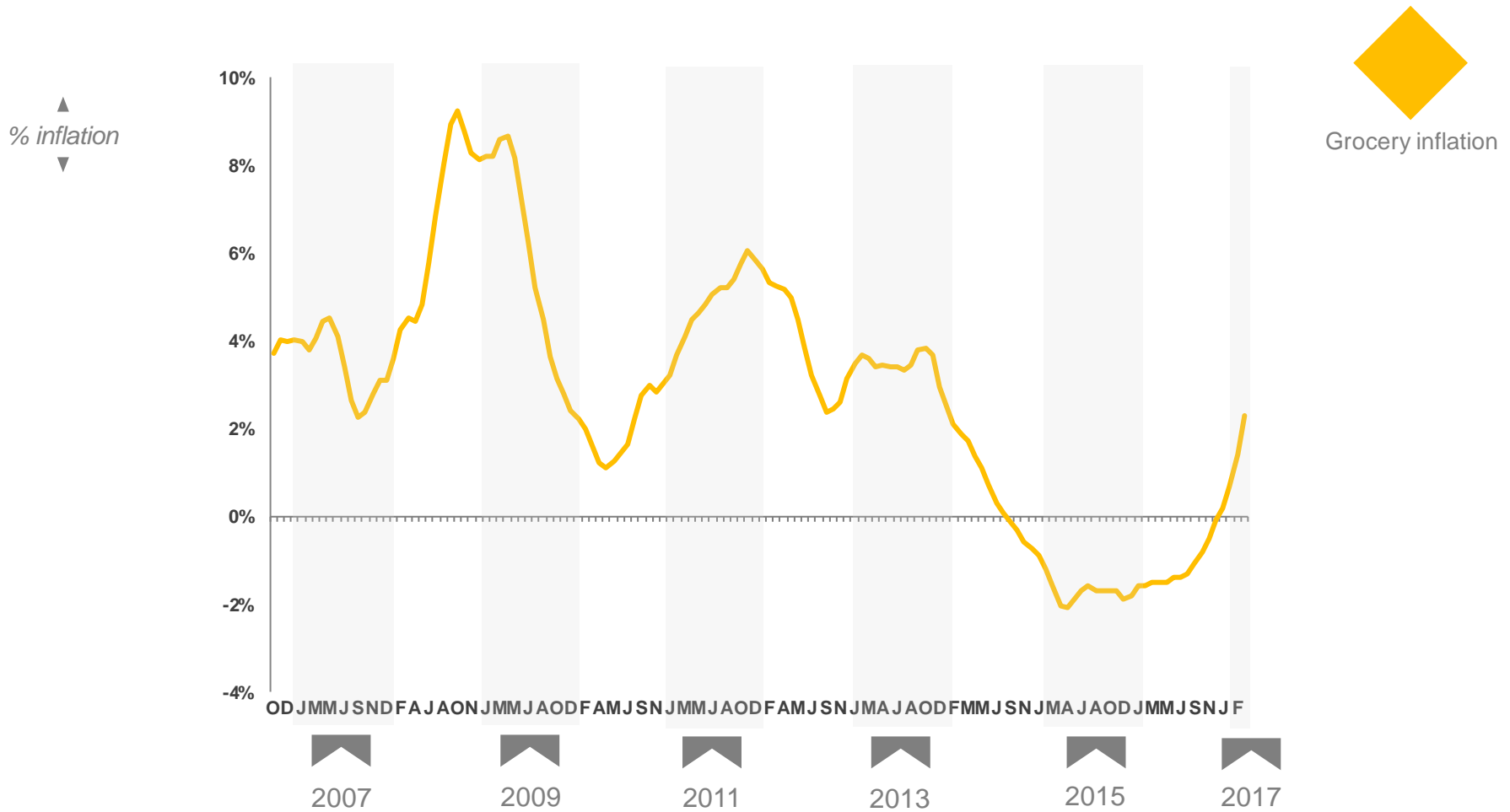
**Spend**

**-1%**



# Grocery inflation

Like for like prices growing 2.3%



# How does poultry compare to other proteins?

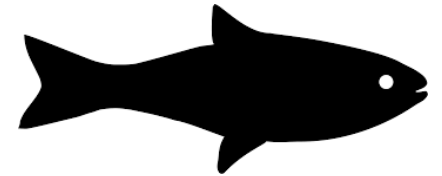
## Price

**-2%**

**+3%**

**-3.5%**

**+5%**



**+3.5%**

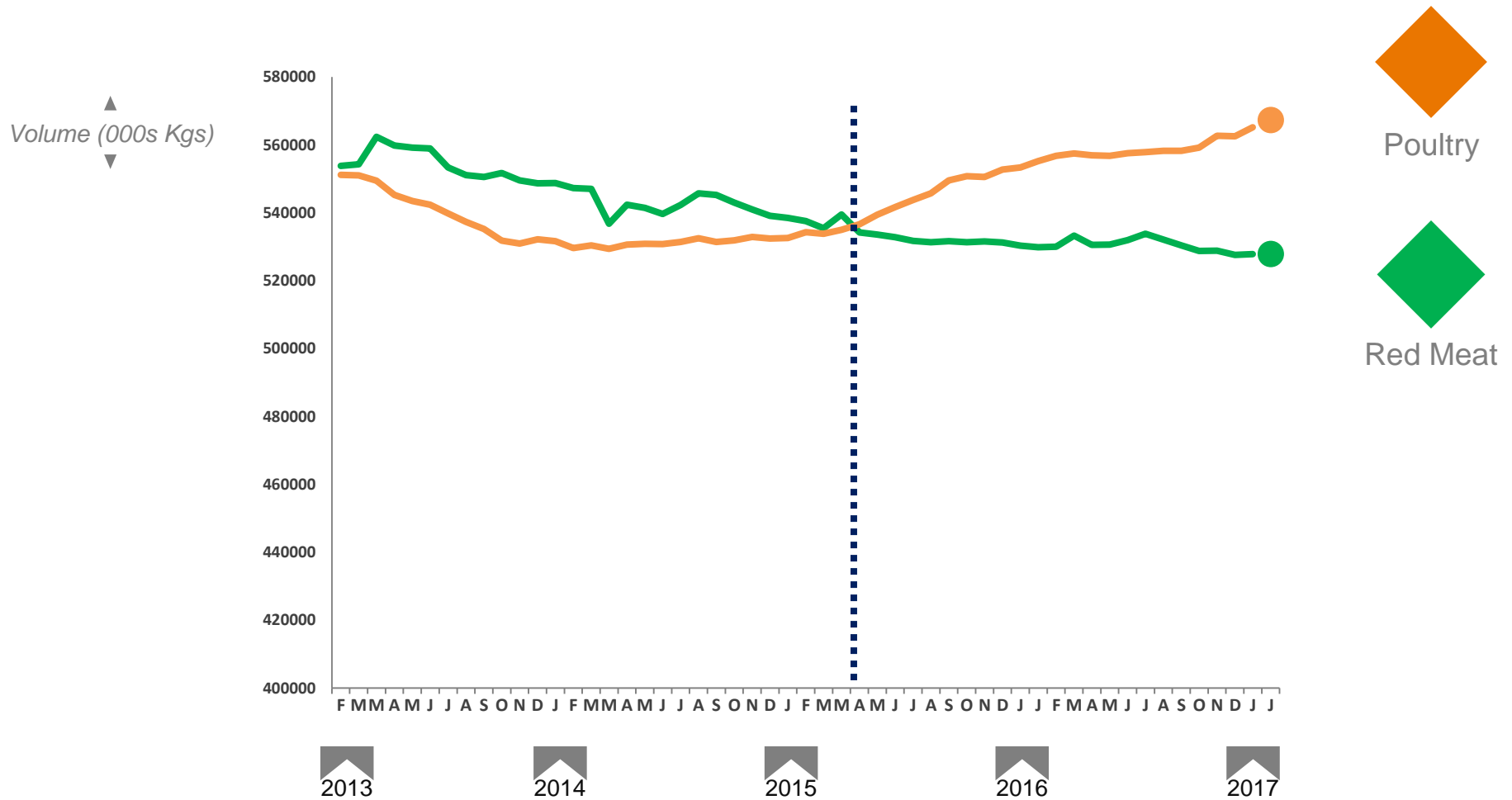
**-8%**

**-4%**

**-0.4%**

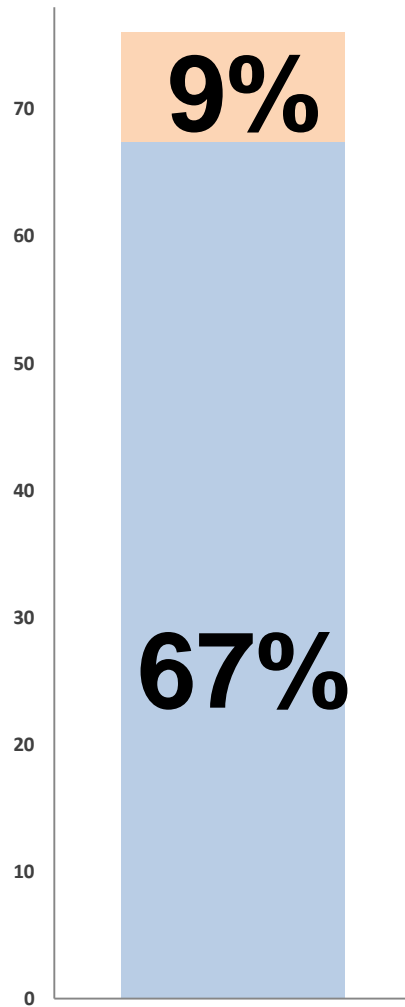
## Volume

# Poultry overtook red meat in 2015

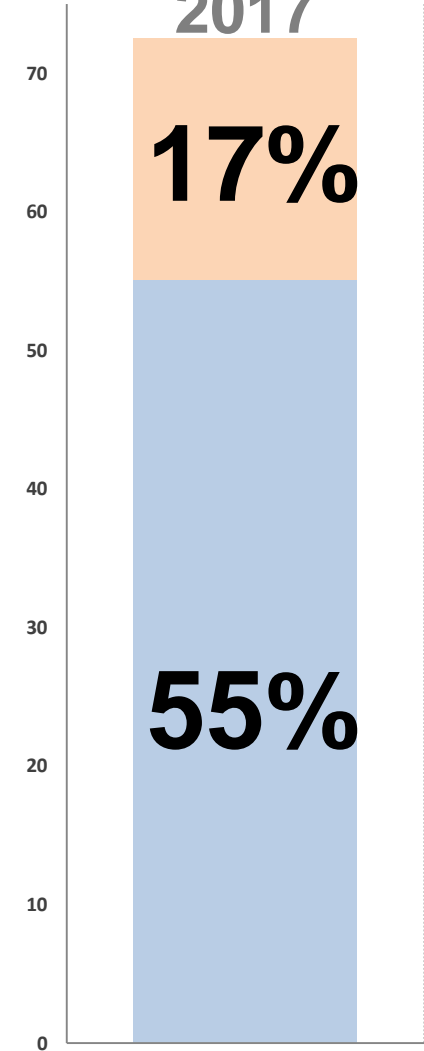


# Discounters over trade in meat, fish & poultry

2013



2017



Primary Poultry Volume Share %



# Discounter meat focus: value & quality



**HOLY COW** The world's most expensive cut of beef is now being sold at ALDI... for just £7.29

Four meat and fish offers, every single week.

Product	Weight	Original Price	Current Price
Melt in the Middle Fishcakes	290g	£1.69	£1.35
Briffish Turkey Breast Steaks	375g	£2.59	£1.99
Classic Pulled Pork	380g	£2.19	£1.75
21 Days Matured Beef Sirloin Steak	400g	£5.45	£4.39

save up to 20%  
Pick of the Week

## Tesco Farm Brands - Why have they done it?



Tesco revamps own-label range in fight against discounters

**Tesco's share price rises as supermarket takes fight to the discounters with launch of seven value own-label ranges**

## The immediate reaction...

### **Tesco's 'fake farm' brands referred to trading standards**

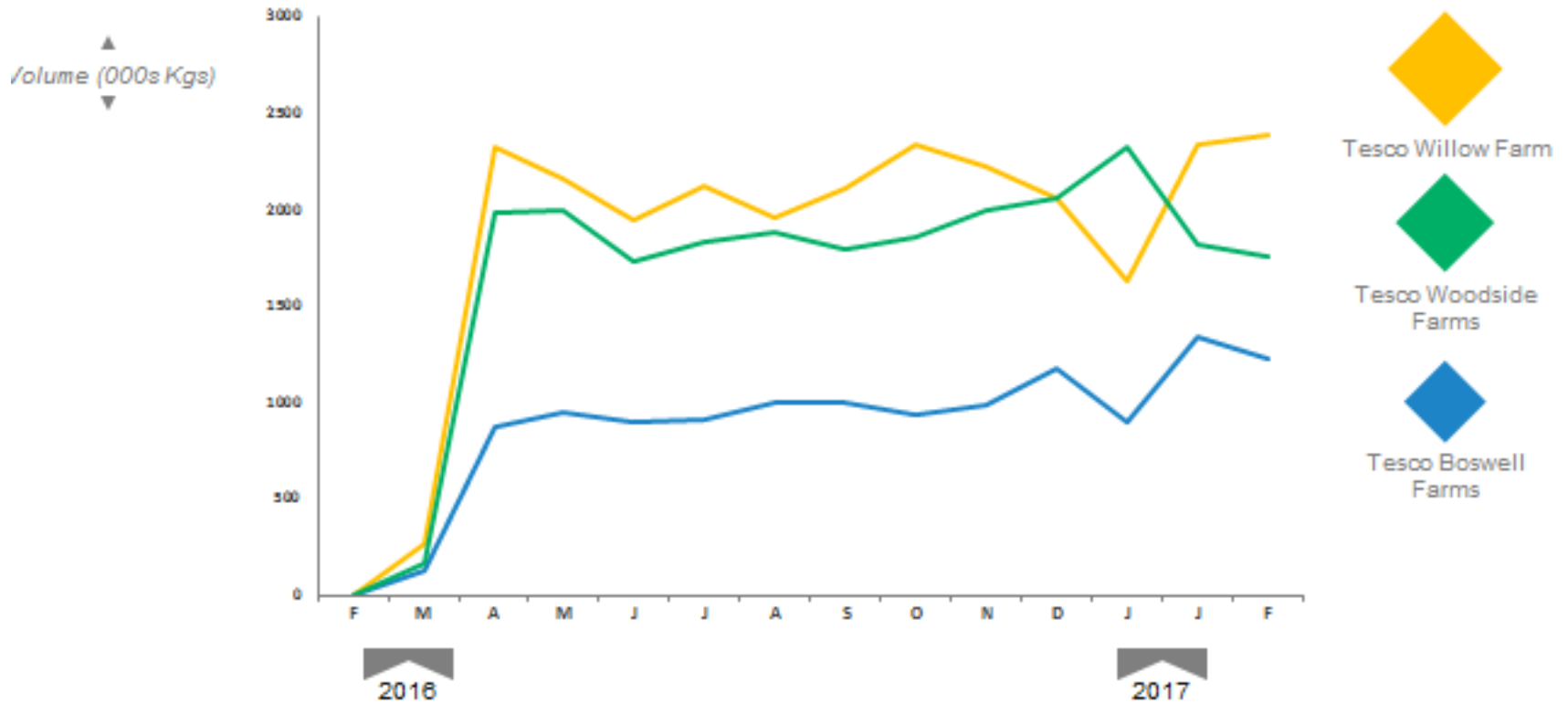
The National Farmers' Union (NFU) will challenge supermarkets over their use of 'fake' farm brands, claiming the practice confuses consumers.

## **Tesco and other supermarkets using fake farm brands spark complaint from NFU**

**Tesco accused of using fictional British-sounding farm names**

Since the launch, the beef and chicken farm brands have seen growth, while pork volume has come down in recent months

Overall, this has added shoppers to the category....



Now Asda has joined in...



## Asda reignites row over 'farm' brands by relaunching value range

Retailer's switch, which follows similar move by Tesco, criticised as misleading for shoppers and insulting to farmers

News > Business > Business News

## Farmers accuse Asda of misleading customers over 'Farm Stores' range

Britain's largest retailer Tesco came under fire last year after the NFU lodged an official complaint over its use of fake farm names

# Asda branding has moved back to tradition

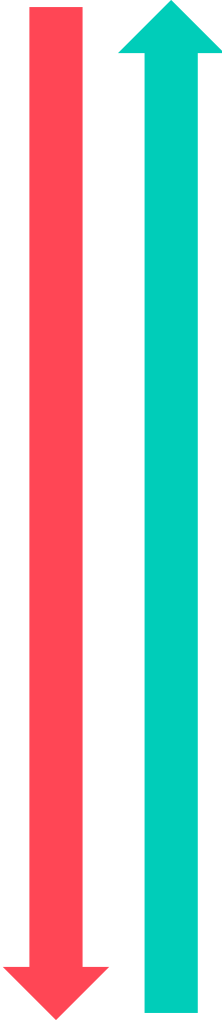




# Health: Threat or Opportunity?

# Decline

# Growth





1 in 4

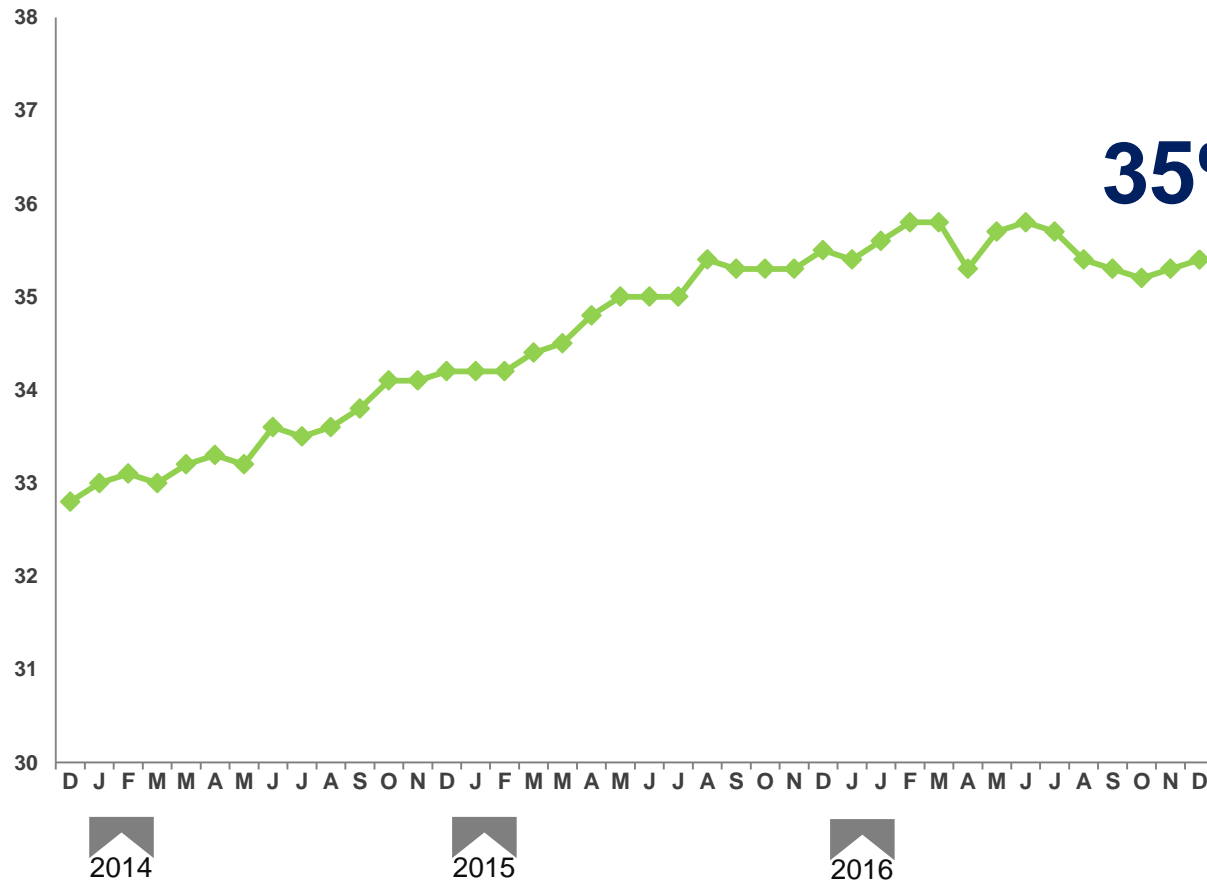
occasions driven by

health

Not about  
reduction

More natural/less processed +5%

# The rise of meat free evening meals



**35%**

**5%**

Population say they are vegetarian

# 59%

of meat free alternatives  
are eaten by non-vegetarians



**41%**

of Meat Eaters are  
'Flexitarians'  
Growing over  
**5x faster**  
than the  
**GB population!**

# Some areas of meat have adapted...

**Lean & Bean Mince**  
800g Product Code: 5529584

**£3.50** (£4.38 per kg)

ASDA

ENERGY	MED	LOW	LOW	MED
	Fat	Saturated	Sugars	Salt
1173kJ 280kcal	7.1g	2.6g	1.3g	0.66g
14%	10%	13%	1%	11%

Ingredients: Lean Beef Mince (50%), Cooked Haricot Beans (40%)

#funky flexitarian  
A delicious balance

6 beefy balls in bean & beet burgers  
12 mushroom chicken chipolatas  
12 karabibidul chipolatas  
6 beefy tomatoes & onion tagliarini

Now available from Waitrose

Not just a threat to red meat

Quorn™  
MEAT FREE  
THAI  
Chicken Fillets

2 pack

166g e

50% EXTRA FREE

Quorn™  
MEAT FREE  
healthy protein  
Chicken Pieces

Low in Sat Fat

450g e

Free range still thriving in eggs

Egg Volume

+4%

**82%**

**of shoppers now  
buy free range eggs**

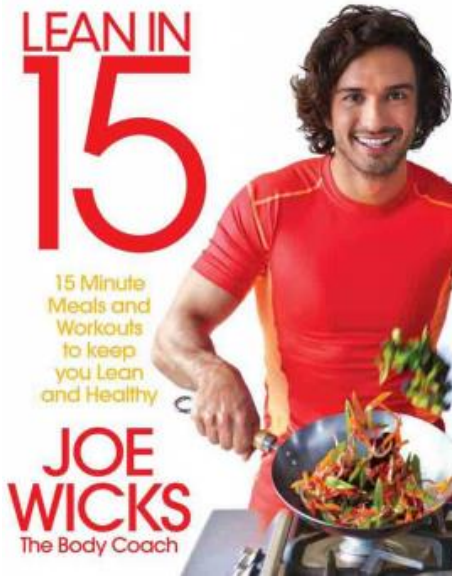
**2 million**

**more shoppers  
vs 2013**

A top-down view of a wooden cutting board. The board is filled with various pieces of food: several pieces of golden-brown, pan-fried chicken are arranged in the upper left and middle sections. To the right of the chicken are numerous pieces of red bell pepper, cut into strips and chunks. In the lower half of the board, there are several pieces of bright green broccoli florets. The lighting is bright and even, highlighting the textures of the food.

How can poultry keep its share of the plate?

# Poultry and eggs can win from the need for protein



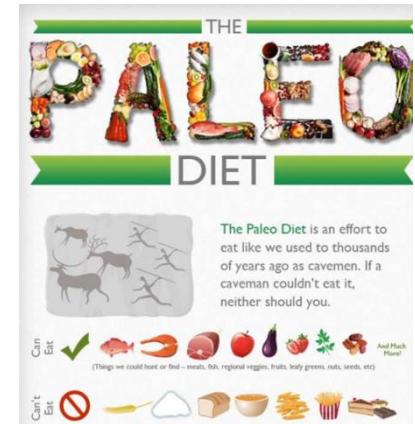
## What about protein?

Protein forms the basis of all meals in the Lean in 15 plan, and remains consistent on both training and rest days. Protein is essential for:

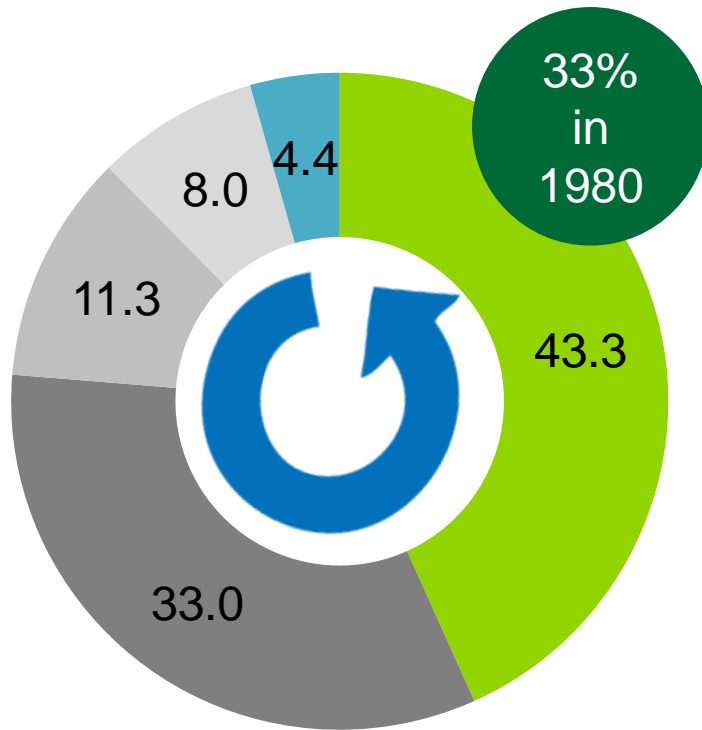
- Maintaining the structure and strength of cells and tissues
- Regulation of metabolism
- Production of hormones
- Repair and growth of muscle tissues
- Strengthening your immune system

## Where should I get my protein?

Proteins are broken down into amino acids inside the body. Many of my recipes contain animal protein sources, such as eggs, fish, chicken and beef. These are considered complete protein sources because they contain all the essential amino acids needed by the body. If you are a vegetarian you can of course use tofu or Quorn as a protein source, but you'll need to eat much larger quantities to get your protein intake to the required level.



# Embrace changing households and habits



32 mins



■ 1 person ■ 2 people ■ 3 people ■ 4 people ■ 5+ people



# Convenient options are crucial to keep chicken in consumer repertoires



+4%

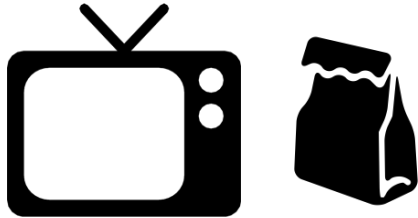


+12%

# Be ready for the potential effects of Brexit



Volume should remain stable, but we may move back to frozen



Cooked poultry and meal deals will be crucial



More of this? 



Added value meal solutions could fulfil this need





## 3 things to remember looking forward

**Retail  
landscape is  
changing,  
especially in  
poultry**

**Shoppers want  
easy, healthy  
solutions**

**Brexit may  
change the  
way we shop,  
and poultry  
must be ready  
to adapt**

THANK YOU

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