

Processed Poultry and Red Meat Main Meal Components - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Health and environmental concerns have prompted many people to cut back on processed meat. However, premium products can tap into the widespread ‘less but better’ mindset to support value growth. Meanwhile eco-friendly packaging and carbon offset guarantees are promising means for companies to demonstrate their environmental commitments.”

– Alice Baker, Research Analyst

This report looks at the following areas:

- Multiple avenues for companies to address health concerns
- Environmentally friendly concepts spark interest
- Premium products can benefit from a ‘less but better’ mentality

Estimated at £4.2 billion in 2018, the UK processed poultry/red meat meal components market grew by 5.9% over 2013-18, due mainly to inflation. Inflation is expected to be the primary driver behind the projected 13% growth in value sales over 2018-23, with negligible underlying volume sales.

That nine in 10 (89%) UK adults eat processed meat as part of a main meal demonstrates the enduring mainstream appeal of these convenient and affordable meal components. Bacon and sausages cooked from raw are the most commonly used types, their transparency and relative versatility undoubtedly underpinning this.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Processed Poultry and Red Meat Main Meal Components - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

- What you need to know
- Products covered in this Report

Executive Summary

The market

Inflation drives growth in the market from 2013-18

Inflation and negligible volume sales growth expected for 2018-23

Figure 1: UK retail value sales of processed poultry and red meat, 2013-23

Hot summer of 2018 boosts red meat products

Health and environmental concerns drive consumer cutbacks

Companies and brands

NPD allows own-label to increase its lead on frozen

Figure 2: Leading brands' sales in the UK frozen meat/poultry/meat-free meal components market, 2017/18*

Added vegetables trend continues

Further activity in poultry sausages and burgers

Advertising spend rises substantially in 2017

Birds Eye Iglo leads on advertising in 2017

The consumer

Nine in 10 eat processed meat or poultry as part of main meals

Figure 3: Usage of processed poultry and red meat main meal components, July 2018

Seven in 10 buyers are influenced by low price or promotions

Figure 4: Processed poultry and red meat buying factors, July 2018

No unnecessary antibiotics and eco-friendly concepts spark interest

Figure 5: Consumer willingness to pay more for new product concepts in processed meat, July 2018

Premium products can benefit from a 'less but better' mentality

Figure 6: Behaviours relating to processed poultry and red meat, July 2018

Clean label products have wide appeal

Figure 7: Attitudes towards processed poultry and red meat, July 2018

What we think

Issues and Insights

Multiple avenues for companies to address health concerns

The facts

The implications

Environmentally friendly concepts spark interest

The facts

The implications

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Processed Poultry and Red Meat Main Meal Components - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Premium products can benefit from a 'less but better' mentality

The facts

The implications

The Market – What You Need to Know

Inflation drives growth in the market 2013-18

Inflation and negligible volume sales growth expected for 2018-23

Hot summer of 2018 boosts red meat products

Health and environmental concerns drive consumer cutbacks

Market Size and Forecast

Inflation drives growth in the market 2013-18

Inflation and negligible volume sales growth expected for 2018-23

Figure 8: UK retail value sales of processed poultry and red meat, 2013-23

Figure 9: UK retail value sales of processed poultry and red meat, 2013-23

Forecast methodology

Market Segmentation

Hot summer of 2018 boosts red meat products

Figure 10: Value sales of red meat meal components, by segment, 2013-18

Further inflation expected for 2018-23

Meat reduction trend to continue to hinder volume sales

Environmental concerns could have a slow-burn effect

Figure 11: UK retail value sales of red meat meal components, 2013-23

Figure 12: UK retail value sales of red meat meal components, 2013-23

NPD boosts processed poultry sales in 2018

Inflation and slowing volume sales predicted for 2018-23

Consumer suspicions over heavily processed foods remain a barrier to uptake

Figure 13: UK retail value sales of processed poultry, 2013-23

Figure 14: UK retail value sales of processed poultry, 2013-23

Market Drivers

Multiple factors affect meat prices

Pound's depreciation drives up wholesale prices

Further inflation on the cards for 2018/19

Uncertainty hangs over future household finances

Meat reduction trend continues

Four in 10 have cut back on meat for health reasons

Media reports on meat's environmental impact prompt consumer cutbacks

Retailers up the competition from meat-free

Public focus on plastic waste underlines the need for packaging innovation

Livestock industry makes progress on antibiotics reduction

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Processed Poultry and Red Meat Main Meal Components - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

World foods trend sets British dishes a challenge to stay on the menu

Heatwave boosts sales of red meat meal components

Figure 15: Sunshine hours in the UK, by month, 2013-18

Companies and Brands – What You Need to Know

NPD allows own-label to increase its lead on frozen

Added vegetables trend continues

Further activity in poultry sausages and burgers

Advertising spend rises substantially in 2017

Birds Eye Iglo leads on advertising in 2017

Market Share

Own-label continues to dominate in chilled

NPD helps own-label to increase its lead in frozen

Figure 16: Leading brands' sales and shares in the UK frozen meat/poultry/meat-free meal components market, 2015/16-2017/18

Figure 17: Leading manufacturers' sales and shares in the UK frozen meat/poultry/meat-free meal components market, 2015/16-2017/18

Birds Eye maintains its leading position

Vegetarian brands grow

Cooked sausages post lacklustre sales performance

Morliny benefits from playing up its Polish roots

Figure 18: Leading brands' sales and shares in the UK retail chilled cooked sausages market, 2015/16-2017/18

Figure 19: Leading manufacturers' sales and shares in the UK retail chilled cooked sausages market, 2015/16-2017/18

Launch Activity and Innovation

Various brands launch reduced fat variants

Richmond unveils chicken sausages

Smaller brands and retailers launch premium products

Figure 20: Examples of L/N/R fat sausages, 2018

Picard extends its organic burgers onto the UK market

Added vegetables trend continues

Iceland looks to appeal to parents with added vegetable chicken nuggets

Figure 21: Examples of processed meat/poultry products with added vegetables, 2018

Brands and retailers launch nitrite-free bacon

Figure 22: Example of nitrite-free bacon, 2018

Further activity in poultry sausages and burgers

Aldi chicken sausages spark controversy

Waitrose adds turkey burgers

Figure 23: Examples of poultry sausages/burgers, 2018

Premium own-label burgers draw inspiration from foodservice

Retailers explore unusual toppings

Figure 24: Examples of premium own-label burgers inspired by foodservice trends, 2018

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Processed Poultry and Red Meat Main Meal Components - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Waitrose emulates French bistros with steak haché burgers

Exploring international flavours

Figure 25: Examples of processed poultry products with international flavours, 2018

ABP links with Warner Bros on children's range

Scope for expansion in children's products

Advertising and Marketing Activity

Substantial rise in advertising spend in 2017

Figure 26: Total above-the-line, online display and direct mail advertising expenditure on processed poultry and red meat meal components, 2014-18 (sorted by 2017)

Birds Eye Iglo leads on advertising in 2017

Chicken Dippers portrayed as adding excitement to family mealtimes

Kerry continues its local hero-themed adverts for Richmond

'Nation's favourites' campaign celebrates ordinary people

Radio adverts put the focus on family time

Various brands use social media to make recipe suggestions

Retailers' summer campaigns put the spotlight on premium products

Iceland links premium products with victory

M&S promotes the expertise used to create its 'best-ever burger'...

...and raises the stakes with its traceability focus

Spar looks to harness the power of peer recommendations

Nielsen Ad Intel coverage

The Consumer – What You Need to Know

Nine in 10 eat processed meat or poultry as part of main meals

Seven in 10 buyers are influenced by low price or promotions

No unnecessary antibiotics and eco-friendly concepts spark interest

Premium products can benefit from a 'less but better' mentality

Clean label products have wide appeal

Usage of Processed Poultry and Red Meat Main Meal Components

Nine in 10 eat processed meat or poultry as part of main meals

Sausages and burgers cooked from raw have higher usage than pre-cooked versions

Figure 27: Usage of processed poultry and red meat main meal components, July 2018

Men and families are key users of processed meat

Families are key users of processed products

Financial situation makes no difference to usage

Under-35s are more likely to use pre-cooked products

Over six in 10 eat three or more processed meat types

Figure 28: Repertoire of processed meat/poultry meal components eaten, July 2018

Processed Poultry and Red Meat Buying Factors

Seven in 10 buyers are influenced by low price or promotions

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Processed Poultry and Red Meat Main Meal Components - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Various selling points can appeal, other than price

Figure 29: Processed poultry and red meat buying factors, July 2018

High meat content is valued by many

Makers of high meat content products will need to emphasise this on-pack

Opportunities for clean label high meat content products

Need for lower meat content products to reassure consumers on ingredients

A quarter of buyers are swayed by high animal welfare

Animal welfare claims are rare in processed meat

Smaller brands look to link high welfare with improved taste

Figure 30: Examples of unprocessed meat/poultry products linking high welfare with improved taste, 2018

Tangible statements on animal welfare can help companies to add value

Women and over-55s are more likely to be influenced by animal welfare

Consumer Willingness to Pay More for New Product Concepts in Processed Meat/Poultry

No unnecessary antibiotics guarantees appeal to a third

Figure 31: Consumer willingness to pay more for new product concepts in processed meat/poultry, July 2018

No unnecessary antibiotics guarantees appeal particularly to the health-conscious...

...and to those concerned about animal welfare

Niche brands highlight their minimal antibiotics policies

US examples can provide cues

Figure 32: International examples of processed meat/poultry products making no antibiotics and animal welfare claims, 2018

Environmentally friendly concepts appeal especially to under-35s

A third of users have cut back on processed meat for environmental reasons

Eco-friendly products should help to address consumers' environmental concerns

International examples provide cues for UK operators

Figure 33: International examples of processed meat products with environmentally friendly packaging, 2017-18

Behaviours Relating to Processed Poultry and Red Meat Meal Components

Premium products can benefit from a 'less but better' mentality

Figure 34: Behaviours relating to processed poultry and red meat, July 2018

Various options for companies to signal premium status

Consumer expectations of innovation from premium products sets task for companies

Recipe suggestions spark widespread interest

Encouraging use in recipes would help companies to tap into the world foods trend

Cross-promotions and in-store positioning would encourage use in cooking

Four in 10 users have cut back on processed meat for health reasons

Three in 10 restrict processed meat to certain days of the week

Opportunities for products replacing red meat with poultry

Products with added vegetables attract interest but meet with mixed sales results

Attitudes towards Processed Poultry and Red Meat Meal Components

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Processed Poultry and Red Meat Main Meal Components - UK - November 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Clean label products have wide appeal

Clean label products would help to improve the image of breaded/battered products

Figure 35: Attitudes towards processed poultry and red meat, July 2018

Premium burgers offer considerable competition to restaurants

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Forecast methodology

Figure 36: Forecast of UK retail value sales of processed poultry and red meat meal components, best- and worst-case scenarios, 2018-23

Figure 37: Forecast of UK retail value sales of red meat meal components, best- and worst-case scenarios, 2018-23

Figure 38: Forecast of UK retail value sales of processed poultry, best- and worst-case scenarios, 2018-23

Appendix – Launch Activity and Innovation

Figure 39: New product launches in the UK unprocessed/ processed meat and poultry market, by top 10 claims, 2014-18 (sorted by 2017)

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com