



July 2023

# Total Market Report – Q2 2023

# 1.

**Overall, there are clear signs that shoppers are adapting to the cost-of-living pressures, with their category behaviours becoming more stabilised.**

**Across most markets we record an increase in last occasion consideration for beef, with last occasion purchase incidence holding steady or marginally improving.**

**Slight drop in agreement that people aren't eating out as much, but there has been an increase in agreement that cheaper cuts of meat are being bought in key markets**

**BORD BIA**  
IRISH FOOD BOARD

% Agree

*"I'm not eating out as much as I was earlier in the year to try and save money"*

*"I'm buying cheaper types/formats of meat to reduce my household expenditure"*

	Q2 2023	Q1 2023	Q4 2022		Q2 2023	Q1 2023	Q4 2022
	67%	70%	75%		50%	55%	53%
	70%	71%	74%		52%	52%	54%
	66%	64%	68%		47%	45%	51%
	61%	65%	66%		49%	51%	49%
	55%	54%	57%		51%	47%	53%
	60%	60%	59%		48%	45%	42%
	51%	52%	53%		40%	36%	38%

The number of proteins considered continues to drop back in the Netherlands and Ireland, and is generally down over the longer-term in all markets

Average Number of Proteins Considered

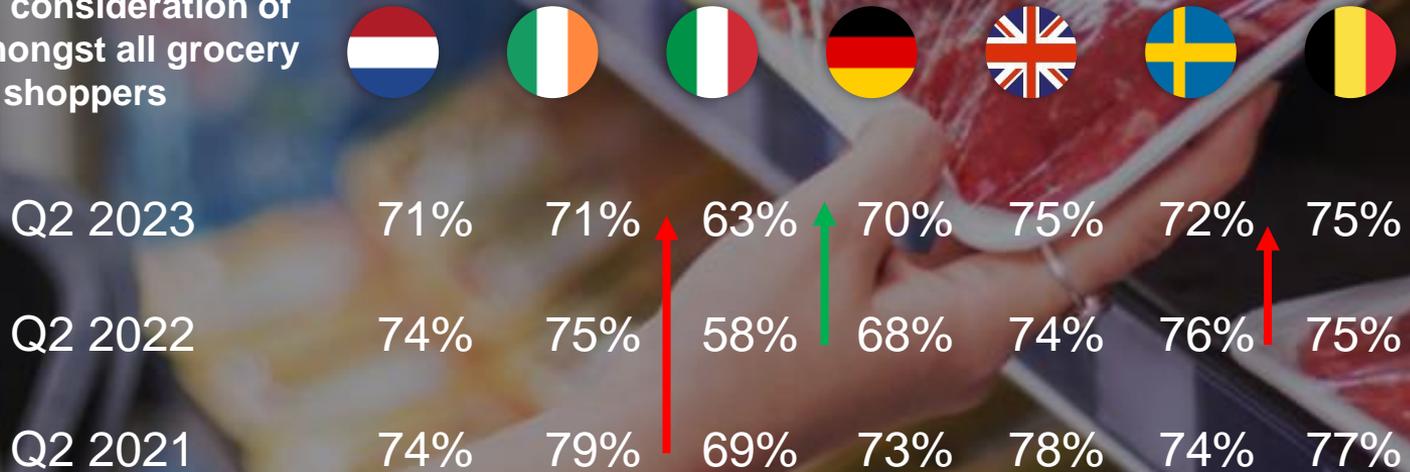
Number of proteins considered

							
Q2 2023	4.1	3.8	4.0	4.2	4.6	4.4	4.7
Q2 2022	4.2	4.0	3.7	4.2	4.7	4.6	4.6
Q2 2021	4.5	4.3	4.5	4.6	5.0	4.6	5.0

# Consideration of beef has dropped back in the Netherlands, Ireland and Sweden year-on-year, but has improved in Italy and Germany

## Overall Consideration of Beef

Overall consideration of beef amongst all grocery shoppers



# Consideration for Chicken and Pork is dropping back in Ireland, with Pork also declining in Italy

## Overall Consideration

### Chicken

	Q2 2023	YOY Change	Change Vs 2021
	88%	-1%	-1%
	85%	+1%	-1%
	80%	-3%	-4%
	80%	-7% 	-11% 
	79%	0%	-3%
	79%	-2%	+2%
	77%	0%	-1%

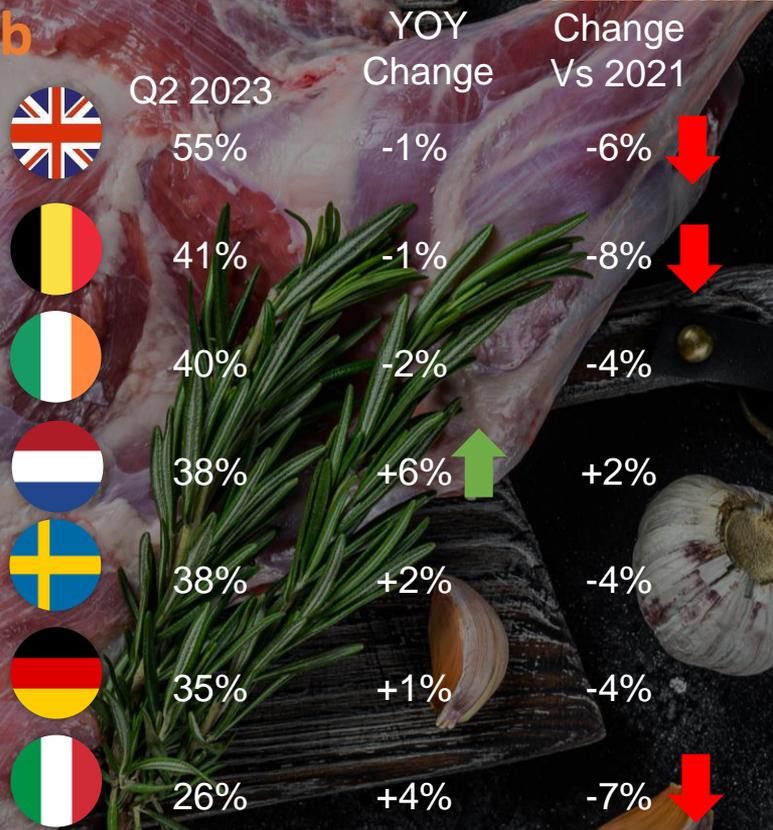
### Pork

	Q2 2023	YOY Change	Change Vs 2021
	65%	+4%	0%
	60%	-2%	-5%
	60%	0%	-4%
	57%	-4%	-4%
	57%	-1%	-5%
	50%	-3%	-6% 
	49%	2%	-8% 

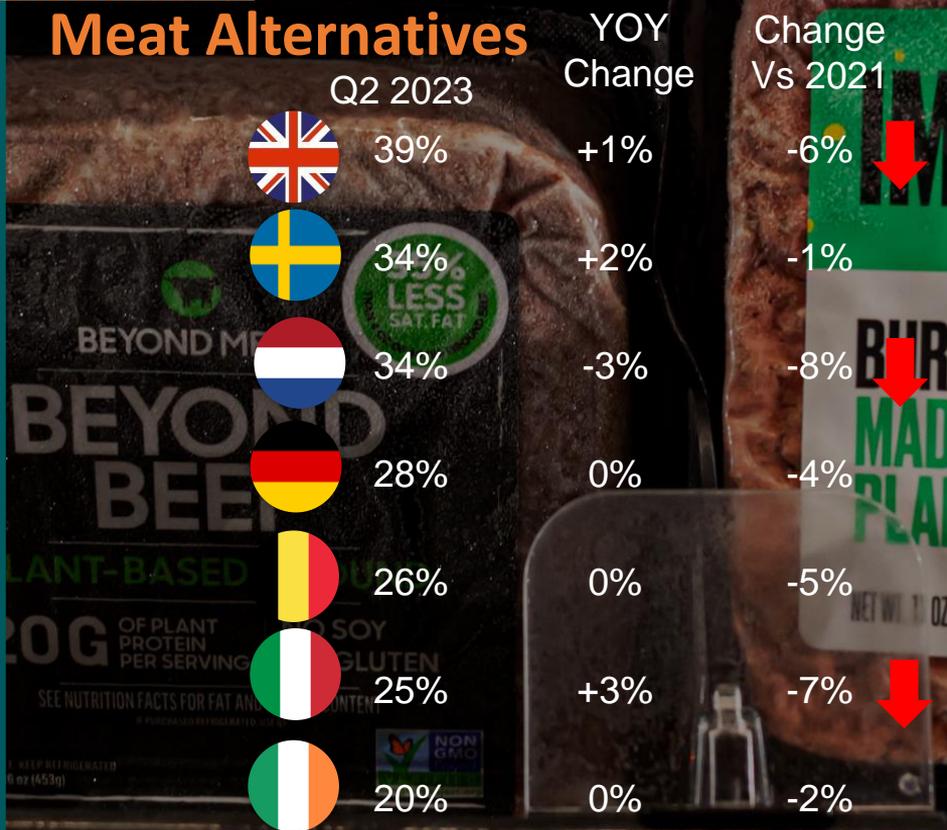
# Lamb consideration is improving in most markets' year-on-year after declines previously. Limited growth evident in relation to meat alternatives

## Overall Consideration

### Lamb

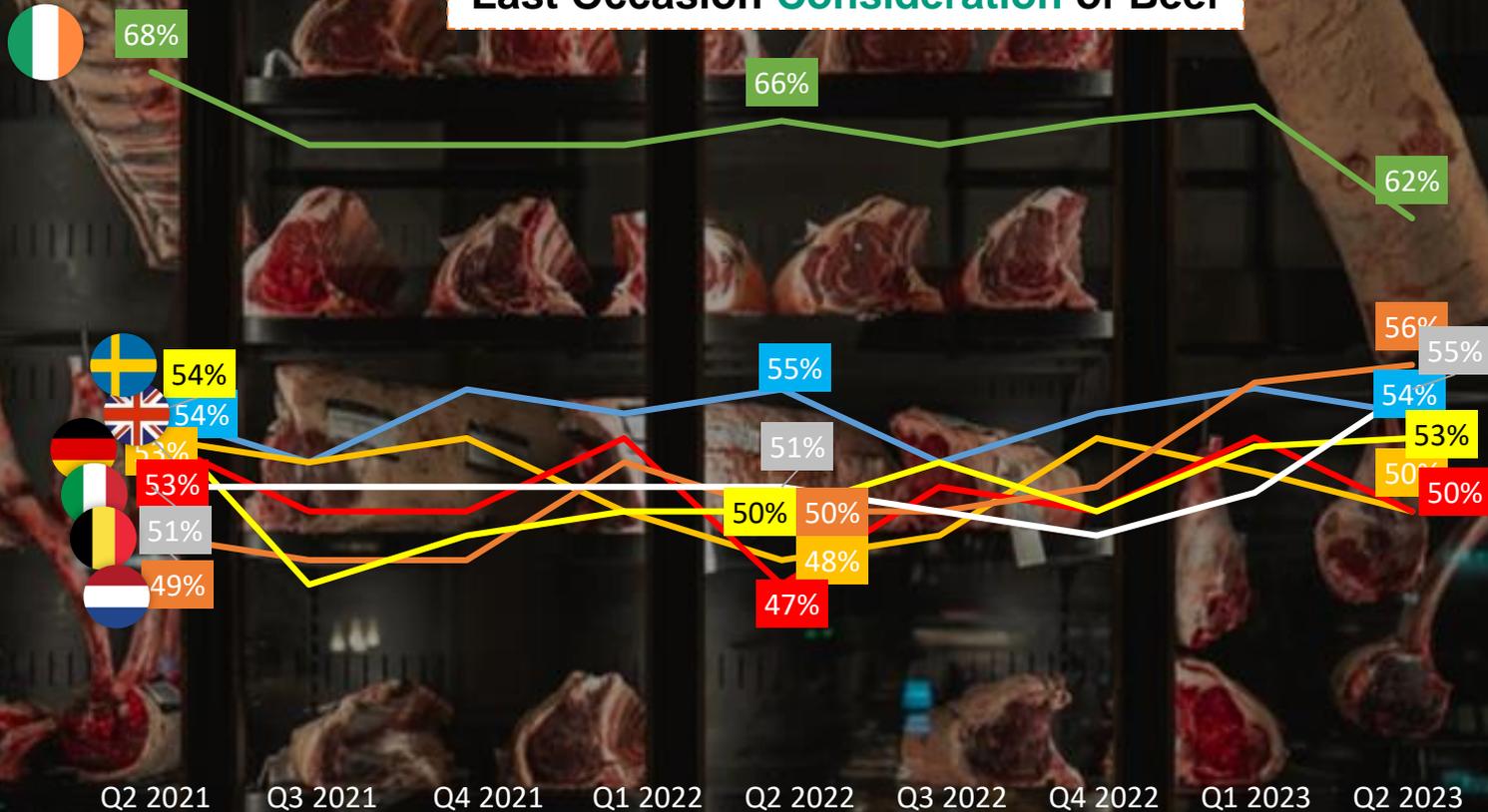


### Meat Alternatives



# Last occasion beef consideration has improved in most markets year-on-year, with the exception of Ireland and the UK

## Last Occasion **Consideration** of Beef

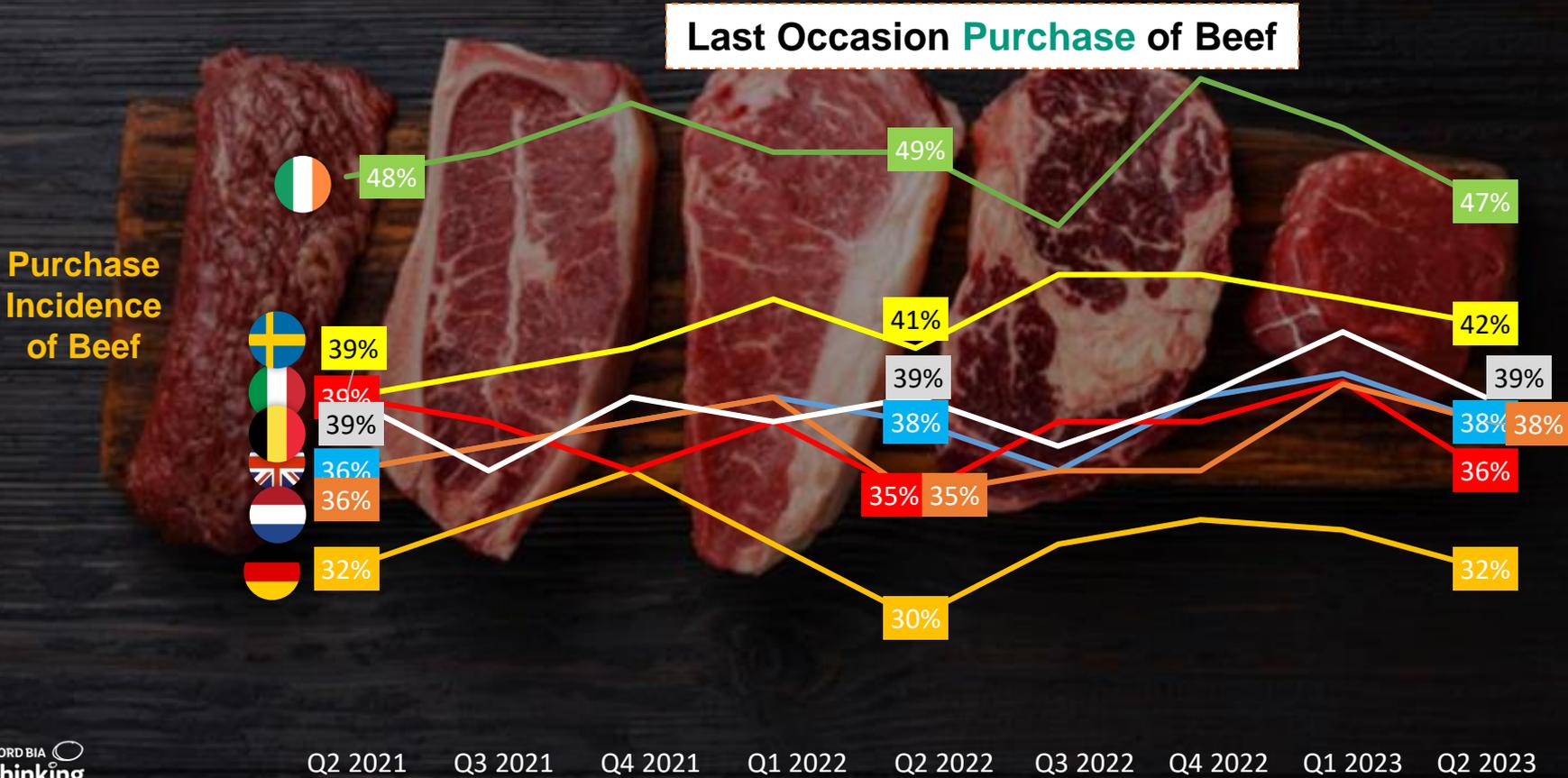


## Beef Engagement

Signs that Engagement (actively reviewing what's on offer) is improving in some markets

	Q2 2023	YOY Change	Change Vs 2021
	47%	-2%	-1%
	42%	+1%	+3%
	39%	-1%	0%
	38%	+3%	+3%
	38%	0%	+2%
	36%	0%	-3%
	32%	+2%	0%

# Last occasion purchase of beef has improved in the Netherlands and Germany year-on-year



(Base: All Beef Considerers)

# The number of formats of beef purchased is quite consistent year-on-year in most markets, edging up in Ireland

Number of types of beef purchased on the last occasion

							
Q2 2023	2.1	2.9	2.9	2.4	2.6	2.3	2.4
Q2 2022	2.1	2.6	2.9	2.4	2.4	2.5	2.3
Q2 2021	2.0	2.6	3.6	2.6	2.9	2.2	2.9



## Last Occasion **Purchase** of Lamb

Last occasion purchase incidence of lamb has improved in all markets, with biggest increases recorded in the Netherlands

Q2 2023      YOY Change      Change Vs 2021

	13%	+1%	-1%
	11%	+2%	+1%
	8%	+1%	-1%
	8%	+3%	+2%
	8%	+1%	0%
	8%	+1%	+1%
	7%	+2%	-1%

## 2.

**Perceived expensiveness is still the most impactful category dynamic at play currently, it continues to increase in influence, but its' rate of growth has slowed somewhat.**

**Decline in the proportion who claim they did not consider beef on the last occasion because it wasn't in their meal plans has reduced – highlighting an opportunity to engage.**

**Positively we record an increase in the purchase of steak in key markets this quarter. While there are still some who claim to be buying less beef overall, we're also starting to record an increase in the proportion who claim they are purchasing more beef.**

# 'Too expensive' continues to increase as a barrier to consideration, while not being in meal plans has declined but continues to be a strong barrier

(Base: All Beef Considerers who did not consider beef on the last occasion)

Barrier to Consideration – RANK	Average scores across markets							Average scores across markets	
								Q2 2023	Q2 2022
It simply wasn't in my meal plans	1	1	1	3	1	2	1	24% 	28%
It is too expensive	2	4	4	1	2	1	2	24% 	20%
I wanted something easier to cook	4	3	5	5	3	4	5	14%	13%
I felt like a change	5	2	2	8	4	8	3	14%	17%
I am trying to reduce my intake of beef	6	5	3	4	5	5	4	13%	12%

Perception that beef is too expensive continues to be a key barrier to consideration, but its rate of increase has slowed. Not being in meals plans is trending down in most, with significant declines in the Netherlands and Germany

Barrier to Consideration

It is too expensive

Wasn't in my meal plans

Country	Q2 2023	YOY Change
Sweden	31%	+5%
Germany	30%	+1%
United Kingdom	30%	+4%
Belgium	20%	+4%
Netherlands	19%	+4%
Ireland	17%	+3%
Italy	15%	+4%

Country	Q2 2023	YOY Change
Sweden	30%	0%
United Kingdom	26%	-2%
Netherlands	23%	-8%
Belgium	23%	-4%
Germany	22%	0%
Ireland	22%	-4%
Italy	14%	-15%

(Base: All Beef Considerers who did not consider beef on the last occasion)

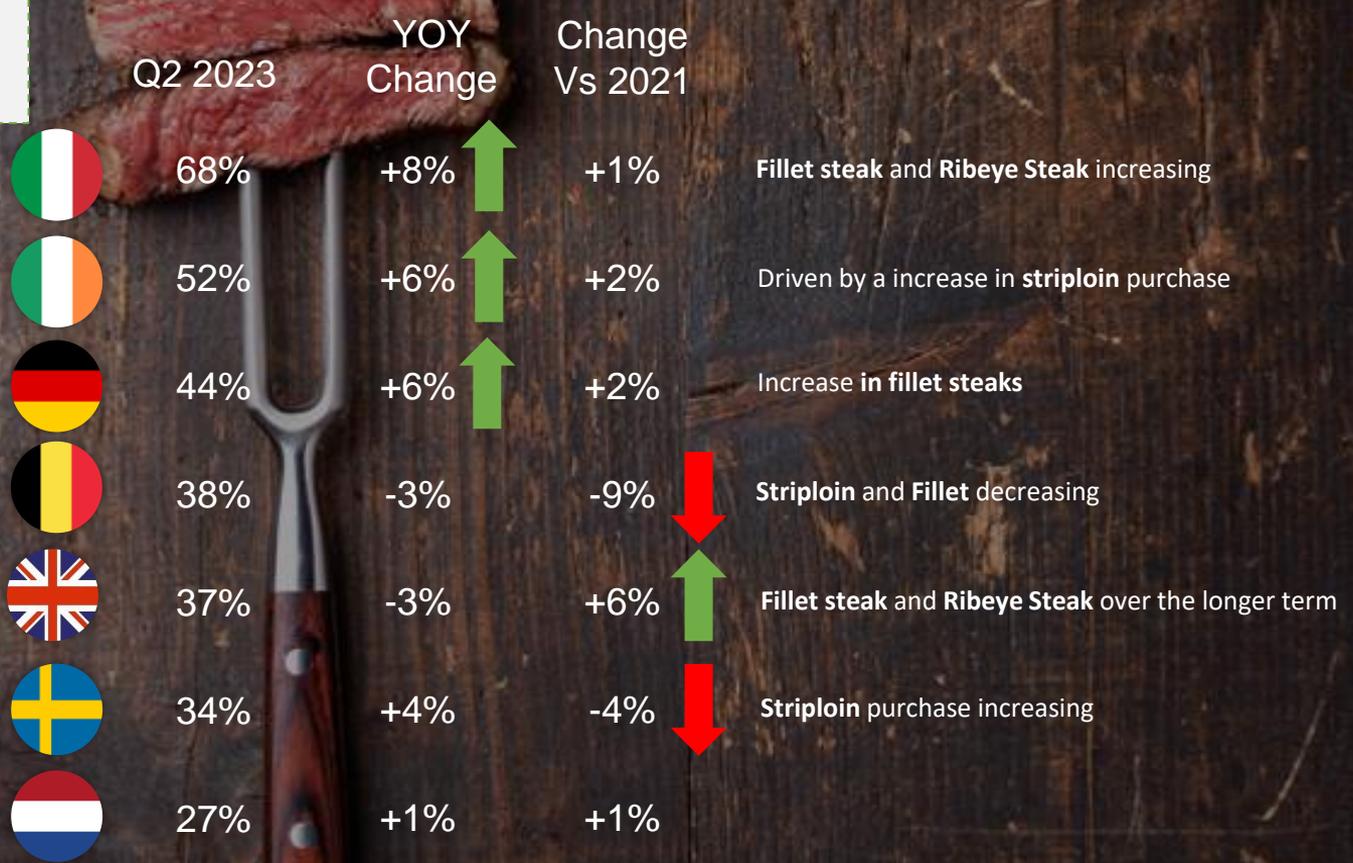
# The cost of beef is ranked as the most significant barrier at point of purchase, increasing year-on-year. Eye-catching alternatives and a desire for change also impacting across markets

(Base: All Beef Considerers who considered beef on the last occasion but did not purchase)

Barrier to Purchase								Average scores across markets	
								Average Q2 2023	Average Q2 2022
It is too expensive	1	1	6	1	1	1	2	26%	22%
I saw an alternative that looked really good	2	4	2	4	5	5	3	18%	17%
I felt like a change	3	2	1	5	4	7	4	16%	16%
The quality of beef on offer was poor	12	11	4	14	6	8	11	16%	19%
It simply wasn't in my meal plans	7	5	3	11	3	6	6	13%	12%

# Signs of improvement in steak purchase in Italy, Ireland, Germany and Sweden, with UK up over the longer-term

PURCHASE OF STEAK ON THE LAST OCCASION



(Base: All Beef Considerers who purchased beef on the last occasion)

# Burger purchase increasing in Germany and decreasing in Italy

**PURCHASE OF  
BURGERS ON THE  
LAST OCCASION**

	Q2 2023	YOY Change	Change Vs 2021	
	31%	-1%	-10%	↓
	33%	-4%	+2%	
	23%	+3%	+7%	↑
	25%	+3%	-4%	
	34%	+4%	-1%	
	28%	0%	-2%	
	28%	+2%	+4%	

*(Base: All Beef Considerers who purchased beef on the last occasion)*

# CLAIMED BEHAVIOURS IN RELATION TO BUYING BEEF

I am buying less; but I am buying my usual beef

I am buying more beef nowadays

	Q2 2023	YOY Change	Q2 2023	YOY Change
	18%	+2%	8%	-1%
	18%	+1%	13%	0%
	17%	+3%	13%	+3%
	14%	+2%	9%	+1%
	12%	0%	17%	+6%
	12%	+2%	13%	+3%
	10%	-6%	13%	+4%

While there are still some who claim to be buying less beef overall, we're also starting to record an increase in the proportion who claim they are purchasing more beef, with a significant increase recorded in Ireland.



# Intended Consumption of Beef Over the Next 3 Years

The level of intention to reduce beef consumption is improving, with a lower proportion claiming they intend to reduce their consumption in most markets – although the overall intention is to reduce

## NET CONSUMPTION

(Proportion Claiming to Consume More vs. Less)

Q2 2023



-42%



-32%



-32%



-28%



-27%



-23%



-22%



Improvement in net consumption position year-on-year (getting more positive)

Expensiveness is the most cited reason for intending to reduce beef consumption in the future, but its impact is not as pronounced as in previous quarters in most markets



+1%



0%



-1%



+12%



+12%



+1%



+5%

Year-on-year movement in relation to expensiveness being a barrier

(Base: All Beef Considerers)

# 3.

**Sentiment towards beef is also moving in the right direction Improvements in relation to beef being a protein that is worth paying more for, being least processed and being the best source of animal protein.**

**And while value for money is still the strongest motivator of purchase, it's clear that demonstrating taste credentials can have a significant role in overall category performance.**

# Improvements in relation to beef being a protein that is worth paying more for, being least processed and being the best source of animal protein

Beef is a protein that is worth paying more for

Beef is the best source of animal protein you can buy

I think beef is the least processed of all meats

	Q2 2023	YOY		Q2 2023	YOY		Q2 2023	YOY
	75%	+2%		70%	+5%	↑	65%	+2%
	70%	+5%	↑	62%	+4%		53%	+3%
	69%	0%		56%	+3%		56%	+4%
	69%	-1%		64%	+4%		54%	+2%
	68%	0%		66%	+1%		56%	+7%
	68%	+6%	↑	60%	+2%		55%	+5%
	63%	+4%		60%	+4%		52%	+1%

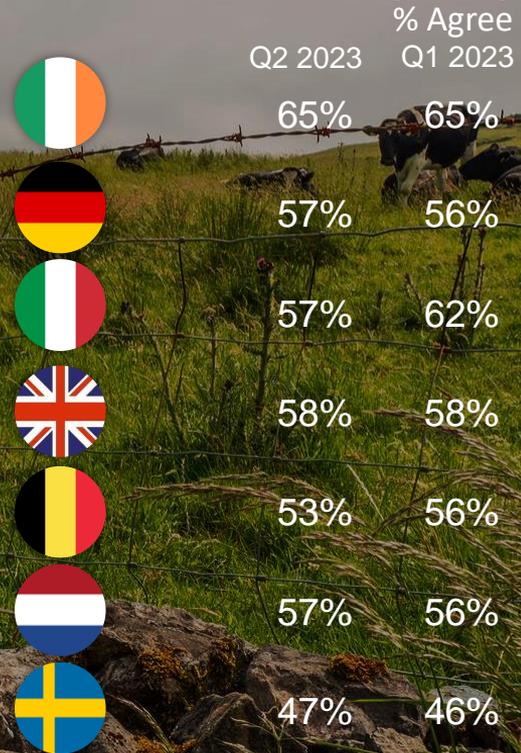
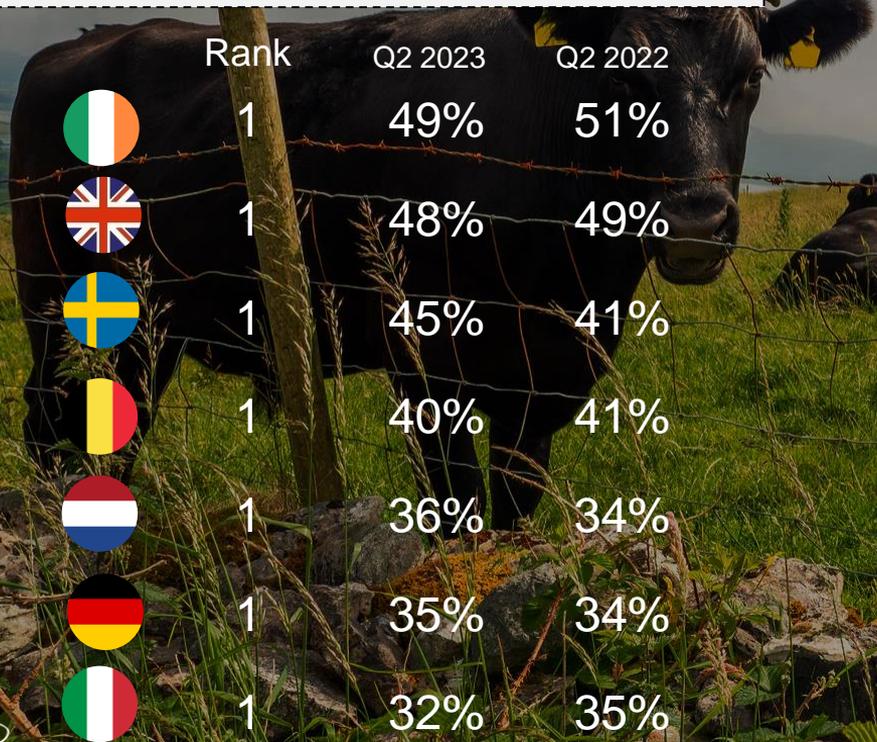
# While value is still a key driver of future purchase, but it is not growing to the same extent as recorded previously

## Motivators of Future Purchase

Beef which is good value for money

## Shopper Behaviours

*"I purchase nicer foods to consume at home at the weekend instead of eating out"*



# Taste increasing in perception for most markets apart from Germany, with a strong influence on better quality beef in most markets

Association of taste with Better Quality

I think Beef tastes great; it's a real treat

	Q2 2023	YOY
	90%	+1%
	88%	-2%
	87%	+2%
	86%	+1%
	86%	+1%
	84%	+2%
	83%	-5%

Taste one of the top signifiers of quality in most markets  
(Italy more likely to cite grass-fed)

	Q2 2023	Rank
	44%	1
	41%	1
	39%	2
	38%	1
	37%	2
	34%	3
	31%	5

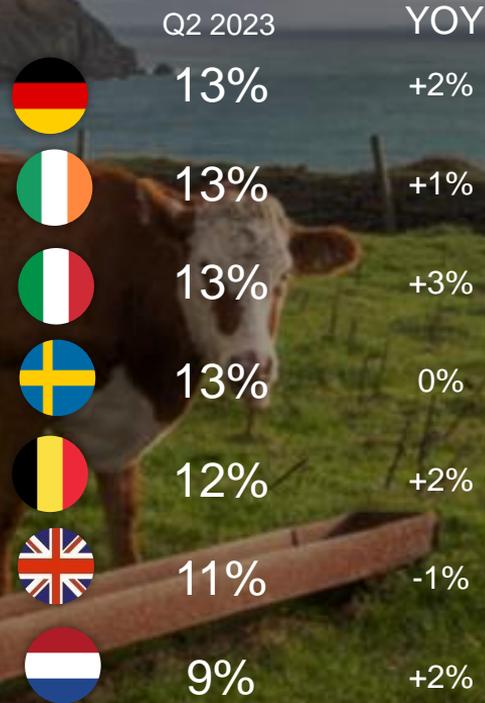
**For key markets such as Italy and the UK, grass-fed has a strong association with quality and can act as a compelling trigger to trade-up**

	Association with Better Quality beef		Impacting on enticing shoppers to trade-up	
	Q2 2023	Rank	Q2 2023	Rank
	45%	1	32%	1
	37%	2	21%	3
	37%	3	21%	4
	33%	5	22%	4
	29%	6	20%	4
	29%	6	18%	4
	23%	7	17%	5

Layering grass-fed communications with wider credentials in producing beef can also play a role in prompting trade-up as we record an increase in the proportion who claim reputation of beef production would prompt them to trade-up

Produced in a country known for its beef production

Impacting on enticing shoppers to trade-up



# The importance of Taste and grass-fed is combined with growth in interest levels for Irish and Grass-fed beef formats.



## Interest in Irish Versions

### Steaks

### Burgers

## Interest in Grass fed Versions

### Steaks

### Burgers

	Q2'23	YOY										
Steaks	47%	+5%	55%	+1%	47%	-4%	47%	+4%	30%	+6%	54%	+0%
Burgers	37%	+5%	32%	-2%	24%	-2%	36%	+6%	22%	+2%	28%	+4%
Steaks	44%	+2%	63%	+3%	50%	-3%	48%	+4%	43%	+3%	57%	-2%
Burgers	36%	+4%	35%	-2%	24%	-2%	36%	+6%	29%	+1%	34%	+4%

# Key Considerations

Shopper behaviours appear to be stabilising somewhat, with consideration and purchase on the last occasion moving in the right direction in most markets. Added to this, the positive sentiment towards beef is moving in the right direction but we need to continue to convince on worth.

## 1.

With shoppers stabilising behaviours we need to capitalise on these positive movements and overall sentiment. There are signs that shoppers are starting to increase their purchase of steak once more, we need to ensure we give shoppers even more permission to do so with a strong value proposition.

## 2.

Taste and grass-fed are a strong combination for shoppers and these two elements can entice trade-ups in most markets – this presents an opportunity for Irish beef by dialling up communications in this area. The impact of reputable production is also on the rise.



# Thank You