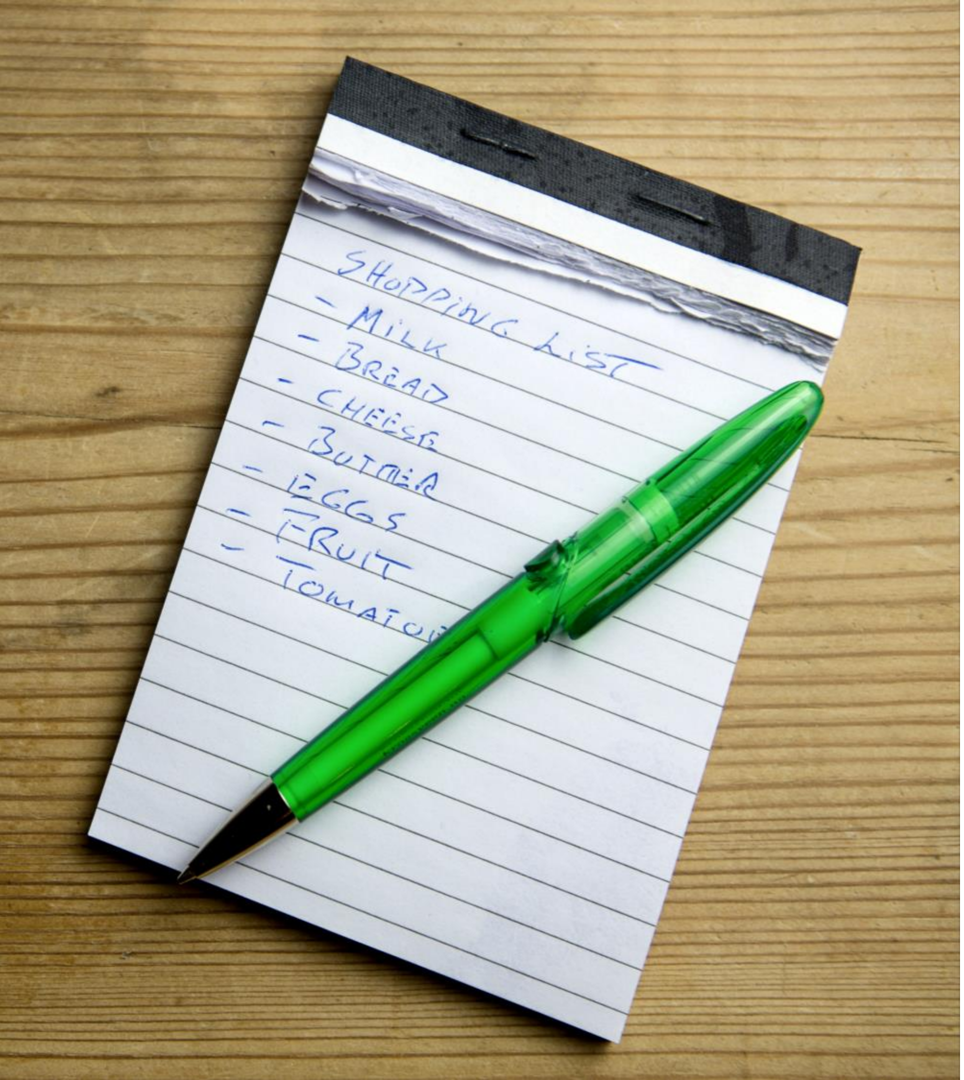
Meat Shopper Insight

- Understanding protein dynamics and meat shopper behaviour
- Supporting your category management for closer category partnership with retailers
- N=500 grocery shoppers per market monthly
- Figures are across Q4 2022 and comparable points in previous years

100,000+ interviews conducted to date

BORD BIA Thinking House



1.

Shoppers are sticking to what they know and reducing risk

Shopper repertoires have reduced with the number of proteins considered down in all markets

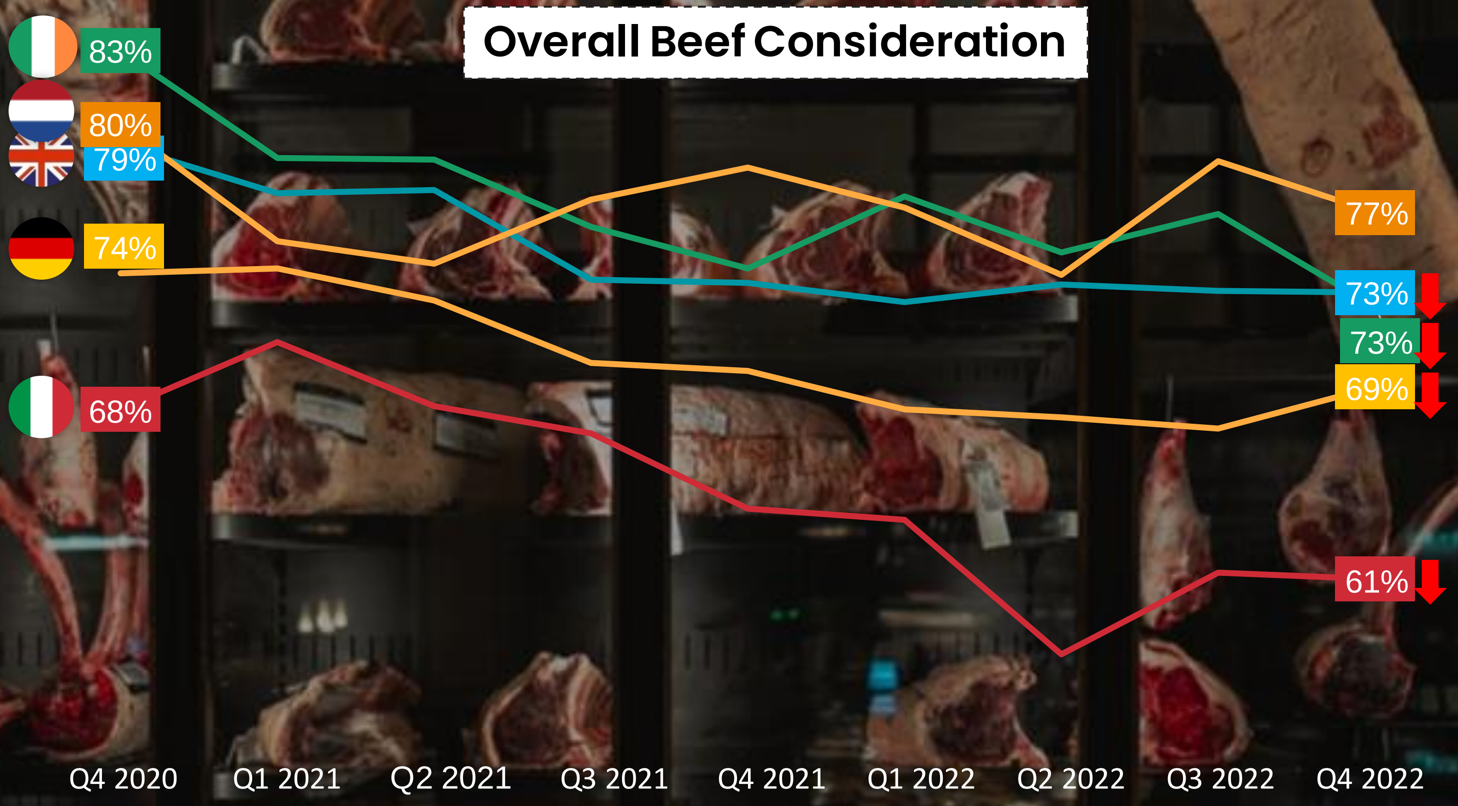
Average Number of Proteins Considered

Number of proteins considered	Ireland	Italy	Germany	UK	Belgium
Q4 2022	3.7	3.9	4.1	4.5	4.7
Q4 2021	4.1	4.2	4.2	4.7	4.8
Q4 2020	4.3	4.7	4.6	5.1	5.0

(Base: All Grocery shoppers)

BORD BIA Thinking House

Overall consideration, along with other proteins, is down in a number of markets



BORD BIA Thinking House

(Base: All Beef Considerers)

Overall Consideration

Pork

Consideration for pork trending down in most markets, except where it is most popular (Belgium)

Q4 2022	YOY Change	Change Vs 2020
64%	5%	-1%
62%	0%	2%
61%	-3%	-3%
59%	-1%	-5%
59%	0%	-8%
50%	-5%	-12%
47%	-6%	-10%

(Base: All Grocery Shoppers)

BORD BIA Thinking House

Overall Consideration

	Q4 2022	YOY Change	Change Vs 2020
UK	54%	-4%	-9%
Belgium	42%	-4%	-6%
Ireland	35%	-8%	-11%
Sweden	35%	-4%	-1%
Germany	34%	-1%	-6%
Netherlands	32%	-2%	-5%
Italy	25%	-6%	-12%

Lamb

As we've noted throughout the year, lamb has been particularly hit by shoppers reducing their repertoire

BORD BIA Thinking House

(Base: All Grocery Shoppers)

Chicken

Consideration for chicken quite consistent year-on-year

Overall Consideration

	Q4 2022	YOY Change	Change Vs 2020
	87%	-1%	-4%
	86%	2%	0%
	86%	1%	-1%
	86%	0%	-6%
	80%	1%	3%

(Base: All Grocery Shoppers)

Overall Consideration

	Q4 2022	YOY Change	Change Vs 2020
	36%	-3%	-4%
	35%	-2%	1%
	34%	-3%	-10%
	28%	1%	-2%
	25%	-2%	-2%
	24%	-3%	-4%
	19%	-4%	0%

Meat Alternatives

Remain a novelty and a risk for most shoppers

Shoppers are reducing their repertoire as they feel priced out of some proteins – and aren't looking to experiment

Barrier to Consideration

It is too expensive

Q4 2022	YOY Change
32%	+14%
29%	+6%
28%	+8%
23%	+8%
20%	+6%
17%	+7%

Felt like a change

Q4 2022	YOY Change
16%	-2%
14%	-8%
13%	-3%
10%	-3%
9%	-18%
7%	-6%

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

BORD BIA Thinking House

2.

Shoppers are trading down but they won't stop buying their "essentials"

Higher end cuts (e.g. steak) are under pressure in most markets

PURCHASE OF STEAK ON THE LAST OCCASION

	Q4 2022	YOY Change	Change Vs 2020
	44%	-5% ↓	-4%
	34%	-5% ↓	-2%
	37%	-12% ↓	-11% ↓
	32%	-7% ↓	-7% ↓

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

Mince and Burgers are in growth

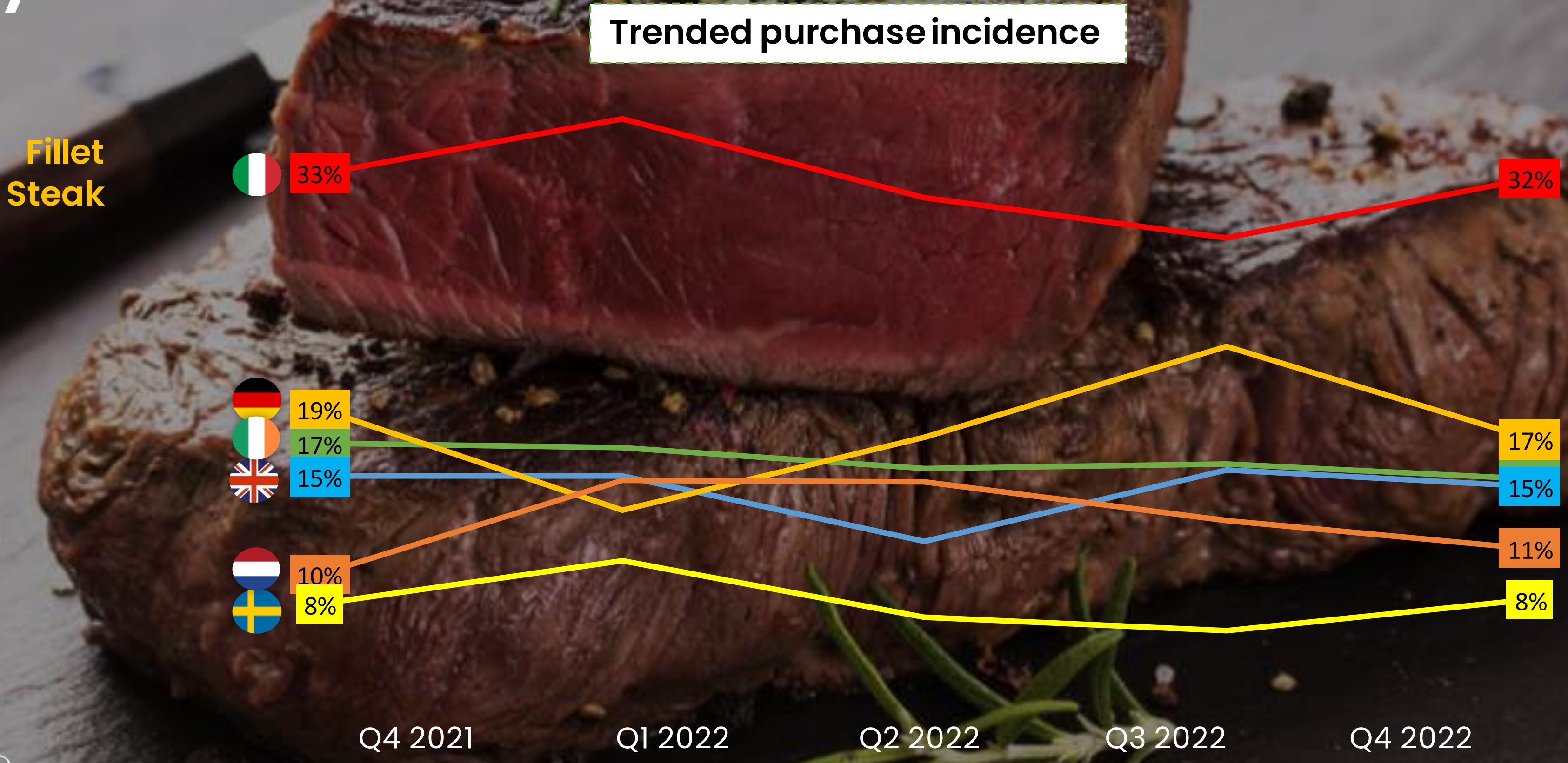
	Q4 2022	YOY Change
	57%	+5%
	57%	+7%
	56%	+1%
	52%	+3%
	43%	+3%

	Q4 2022	YOY Change
	32%	-1%
	31%	+6%
	28%	+3%
	26%	+1%

BORD BIA Thinking House

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

Fillet Steak purchase remains quite consistent in key markets

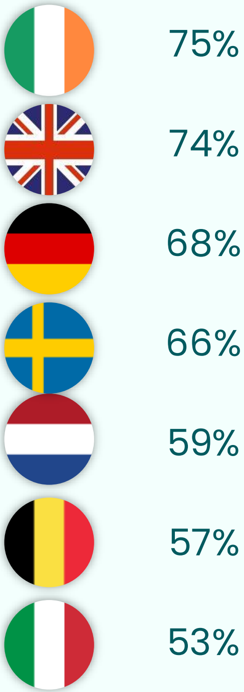


(Base: All Beef Considerers who purchased beef on the last occasion)

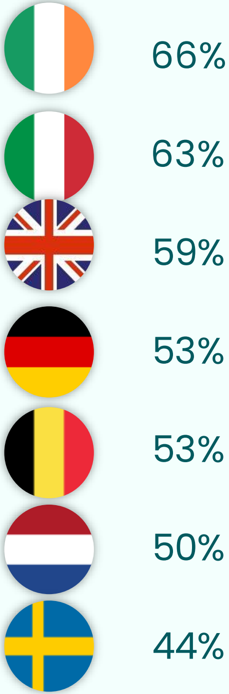
Bord Bia Thinking House

An even larger amount are cutting down on eating out, and we'll see that even more in Q1 2023

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



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



Base: All Beef Considerers

3.

Shoppers have no intention to compromise on taste, but how they eat and shop sustainably has changed

Obviously, value for money is the most important element for shoppers

Motivators of Future Purchase

Beef which is good value for money

	Q4 2022	Rank
	52%	1
	49%	1
	42%	1
	42%	1
	36%	1
	35%	1
	34%	1

Right now shoppers' value equation is all about what they trust – and that's taste

		Rank
	45%	1
	44%	1
	39%	2
	39%	1
	34%	4
	33%	4
	32%	3

BORD BIA Thinking House

(Base: All Beef Considerers)

What is becoming less clear to shoppers is the value of elements of beef rearing

Motivators of Future Purchase

Origin of the beef

	Q4 2022	YOY
	42%	-2%
	34%	-3%
	32%	-2%
	25%	-6%
	20%	-5%

Beef which is produced to be sustainable

	Q4 2022	YOY
	31%	-3%
	22%	-4%
	22%	-4%
	19%	-6%
	18%	-3%

BORD BIA Thinking House

(Base: All Beef Considerers)

Despite cost concerns, there is consistently strong interest in Irish versions of key cuts

Q4 2022

				
Interest in Irish Versions				
Steaks	40%	55% ↑	48%	56%
Burgers	32%	34%	32%	27%
Mince	39% ↑	36% ↑	43% ↑	30%
Interest in Grass fed Versions				
Steaks	42%	61%	49%	60%
Burgers	33%	37%	31%	30%
Mince	43% ↑	43%	42% ↑	37%

BORD BIA Thinking House

(Base: All Beef Considerers)

Some opportunities in this challenging environment

Make sure your product is appetising

Give meal inspiration – and reduce shoppers' fears of getting it wrong

Make sure your pre-store communication is right

Innovate with higher end trade down options

Key Challenge: Make yourself essential