

VEGANUARY UNWRAPPED 2021

HAVING POSITIVE
CONVERSATIONS
ABOUT RED MEAT



OVERVIEW

Continuing the success of our recent Veganuary pack - 'Having positive conversations about red meat'.

QMS (Quality Meat Scotland) want to maintain strong consumer engagement by communicating factual stories and statistics about the Scotch difference.

Two key pillars of our marketing and communications strategy include Sustainability and the Scotch farming difference.

With your help, the red meat industry can change the conversation, sharing the pride and passion we have makes a very positive statement and keeps red meat front of mind with consumers.

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LET'S RECAP

125k

At the beginning of Jan, an estimated 125,000 people in the UK signed up to the Veganuary challenge*.

<1%

This is less than 1% of the UK population.

18%

Last year, the challenge saw low completion rates, with only 18% of people who started the challenge actually finishing it**.

*Source: <https://www.theguardian.com/environment/2021/jan/05/veganuary-record-number-people-pledge-eat-vegan-food-january>

**Source: Based on a February 2020 Worldpanel Plus LinkQ survey of 56,117 responses.



THE IMPACT OF 2020

Interest in vegetarian and flexitarian diets has declined as lockdown brought back meat on to the table for a lot of households.

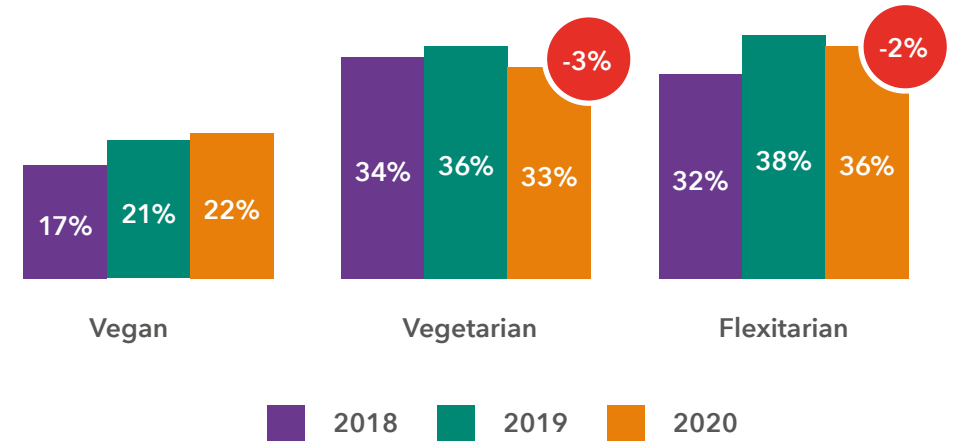
41%

A Mintel study conducted at the end of 2020 shows 41% of UK consumers say they are either not eating meat or actively reducing their meat consumption. In 2019, that figure was 51%.

"Lockdown has definitely had an impact on those consumers who needed a bit of comfort and tradition in their meal choices," says Mintel global food and drink analyst Edward Bergen.

<https://www.thegrocer.co.uk/plant-based/can-the-vegan-eating-boom-continue-at-pace/652112.article>

% of grocery shoppers who currently follow or would consider following this way of eating



IGD report, Are plant-based diets still top of mind for younger shoppers?, October 2020
Base: 2,005 GB grocery shoppers



CONSUMER BEHAVIOURS

Participation for Veganuary was driven primarily by health reasons, as well as environmental, ethical, personal and financial drivers, however:

73%

of shoppers agree the Scotch labels mean the meat is healthier.

59%

of shoppers agree that buying the Scotch labels mean it is more environmentally friendly.



92%

of shoppers agree the Scotch labels mean the meat is produced according to higher standards of animal welfare.

93%

of shoppers agree the Scotch labels mean they can be more supportive of local farmers.



CONSUMER OPINIONS

“

I believe we shouldn't let good meat go to waste.

Clearly, there's an appetite for all things plant-based. But while uptake is on the rise, not everyone is converting to meat-free - some are doing the reverse.

Ideally your diet shouldn't feel restrictive, or be based around others' judgement, but beyond that it's up to you. The way you choose to eat is a completely personal decision, and the only thing you should be doing, is doing what feels right for you at the time.

”

<https://www.cosmopolitan.com/uk/body/diet-nutrition/a35190501/quit-vegan-vegetarian-diet/>

RED MEAT SALES

January 2021 total volumes show over **4.2 million kg** total meat purchases in Scotland, **966,000 kg** higher than the same period last year.

Pork has proved to be a go to in-home meal option during the COVID-19 pandemic. It has seen **significant volume growth** every month since March 2020 and overall, in the last 52 weeks volumes have grown **+8.8%** (Kantar, 52 w/e 27th Dec 2020).

January 2021 sales data shows over **£31.6 million** total meat sales in Scotland, **£7 million** higher than the same period last year.



Based on the latest 12 weeks of sales data, **January is the biggest contributor to growth**, for both Scotland, and the UK as a whole.

Scottish origin is driving growth in Scotland for beef, lamb and pork.



Based on the latest 12 weeks performance to 24th Jan 2021, Beef sales in the retail market are **increasing across the board**.

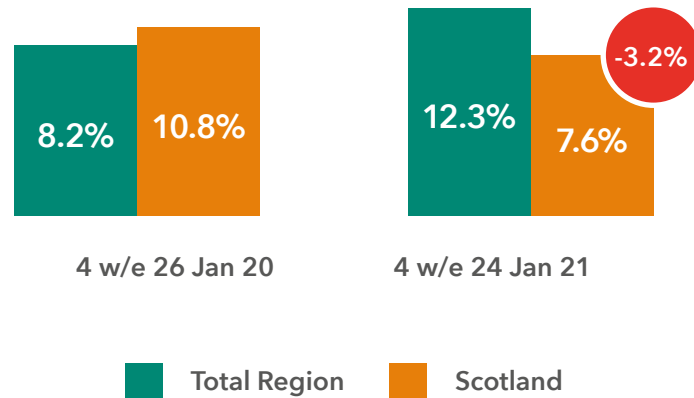
All types of meat are in growth, but **beef** stands out with the **biggest contribution** to value and volume growth in the UK.



MEAT-FREE SALES

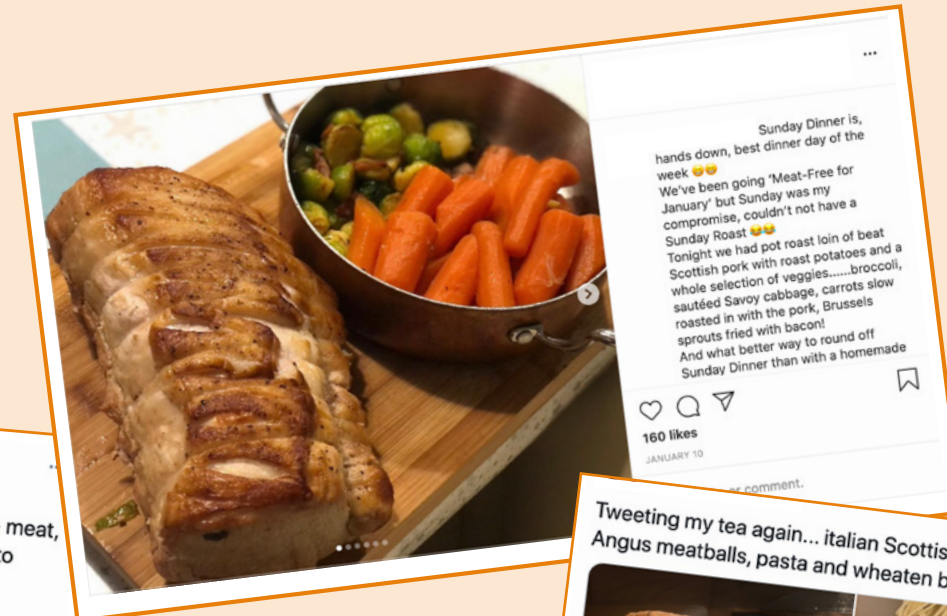
Jan 21 shows the meat substitute category spend is growing at 7.6%, however the growth has declined by -3.2ppts yoy.

Spend % change meat substitute



SOCIAL LISTENING SNIPPETS

We had a look at what people were saying about eating meat in January:



JANUARY ACTIVITY

Here's how we kept the positive messages coming throughout January to keep consumer confidence high

We promoted buying local, red meat health benefits, our quality assurance and animal welfare via:



A TV advert, reaching
1.4 million adults in
Scotland



QMS, Scotch Kitchen
and Influencer Social
Media Channels



An article with Dr Laura
Wyness, reaching 14,938
people



Features in The Courier
and The Press in Journal,
reaching 73,233 people

THE RISE OF REGENUARY

This year, we've seen a rise in activity highlighting the new movement, Regenuary.

New consumer opinion

Regeneration is more important than simply avoiding a food group. The movement asked people to consider for a month, sourcing their food from regenerative and sustainable farms as much as possible and to prioritise local and seasonal produce. Those following the diet would consider the impact of everything they eat and try to source as much as possible from regenerative agriculture.

"It doesn't have to be complicated - regenerative agriculture is just about leaving nature in a better place, rather than destroying it through outdated farming techniques. And what's exciting is that consumers are ready to listen. And the more people who subscribe to higher-quality meat, the more inclusive it will be, and the more affordable. We have that choice." Josh Barrie, inews

Regenuary: the alternative to Veganuary wants you to only eat meat from sustainable sources instead (inews.co.uk)

WHERE DOES FARMING COME IN?

Scottish farmers are important players in Regenuary.

The Circle of Life - how livestock can form part of the solution



EATING LOCAL

A locavore is a person who predominantly eats food that is grown in their local area. Consumers desire to understand and know more about where their food comes from is increasing with the rising awareness and urgency surrounding climate change.

THOUGHTS FROM THE EXPERTS

"Red meat has been an important part of the human diet throughout human evolution. When included as part of a healthy, varied diet, red meat provides a rich source of high biological value protein and essential nutrients, some of which are more bio-available than in alternative food sources. Particular nutrients in red meat have been identified as being in short supply in the diets of some groups of the population."

Importance of red meat in our diet:
Dr Laura Wyness

"All foods have an environmental impact, from cakes to cashews and fruit juice to fish cakes. The sustainability of a diet is indeed a complex area and one that needs further consideration. Social acceptability and consumer trust is key to the sustainable future of cattle production."

Every beef and sheep production system can be sustainable:
Jude Capper

"The plant-based food revolution is fueled by big business," says Elliott. "Some plant-based products are what I would call 'imposter foods'. They are nutritionally bereft. It's important to understand the distinction between gross carbon and net carbon. All the calculations are based on the methane generated by cows (gross) but don't take into account and offset the carbon that the animals deposit back into the soil, which would give a smaller net figure." Rather than outlaw livestock farming, Elliott suggests it is one of the few industries that can change its carbon footprint from positive to negative by using regenerative farming methods, which he says are mind-blowing in terms of restoring the health of the soil.

Transparency in the food industry: Chris Elliott,
Professor of Food Safety at Queen's
University Belfast



FOOD FOR THOUGHT RECAP

We want to leave you with some food for thought.

What have we learned from Veganuary and Regenuary?
And how can we continue to promote these positive
messages to our communities?



Buy quality
assured



Buy local



Buy fresh

Be sensible about what you eat. Aim for a balanced
diet made up of foods your granny would recognise.



WHAT NEXT?

To keep the positive conversations going, we'll be:



Filming videos with industry leaders to substantiate key messages



Collaborating with social media influencers with a large reach to help spread our positive messages



Adding to our bank of infographics with simple but impactful statistics to support the red meat industry



Sharing more positive messages from our channels promoting red meat's success story



Continuing with our seasonal campaigns to protect the sales of red meat, inspire our consumers and keep consumer perception high





WE'RE IN IT TOGETHER

"Farmers are running a tight balancing act and doing their absolute best while exposed to the harshest pressures they have ever faced. We must continue to work alongside farmers, as we always have done, promoting British produce and showing our undivided support in a time of unease."

**The profession has a duty to support its farmers,
Kate Parrish, The Veterinary Record, 2020**

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