

Putting research into practice.

Dr. Phil Hadley

A decorative graphic at the bottom of the slide consisting of several overlapping, wavy, horizontal bands of green. The bands vary in opacity and shade, creating a sense of depth and movement. The overall effect is reminiscent of rolling hills or a stylized landscape.

Outline

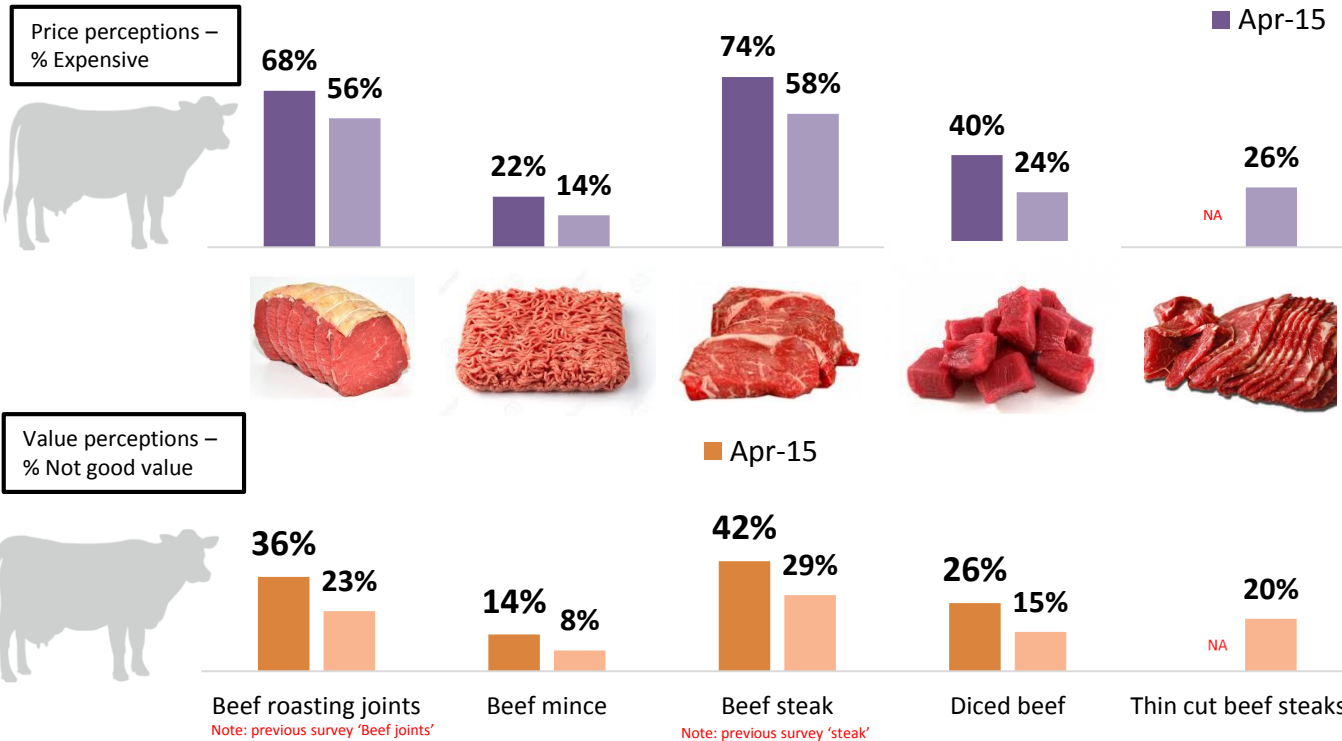
- What's the situation in the UK?
- Recent consumer research in steak experience
- Current state of beef tenderness in England
- What's driving improvement?

- What next?

Currently

- Some perception amongst supply chains that quality is low
- Consumer research suggest dissatisfaction with 'tough' steak occurs regularly (77%) but complaints are rare (10%)
- Issues with casserole/braising for example based on inconsistent use of product not product itself- room for improvement
- Industry efforts to improve quality and minimise variability

Despite a slight drop in proportions, over half still regard beef joints and steak as being expensive...

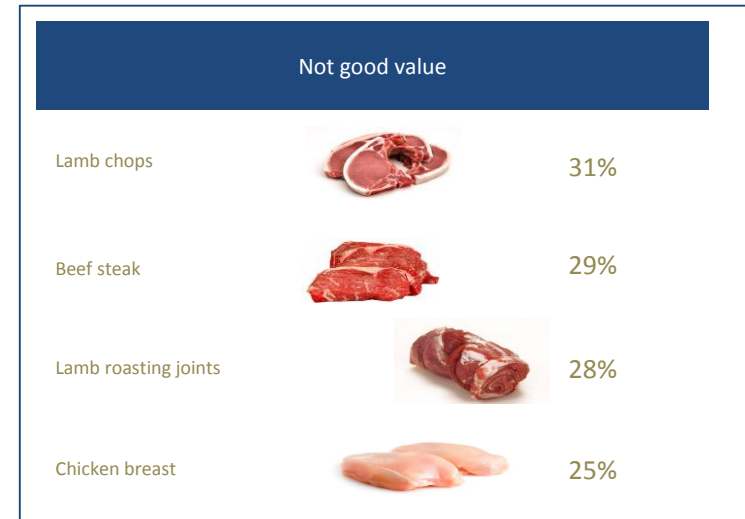
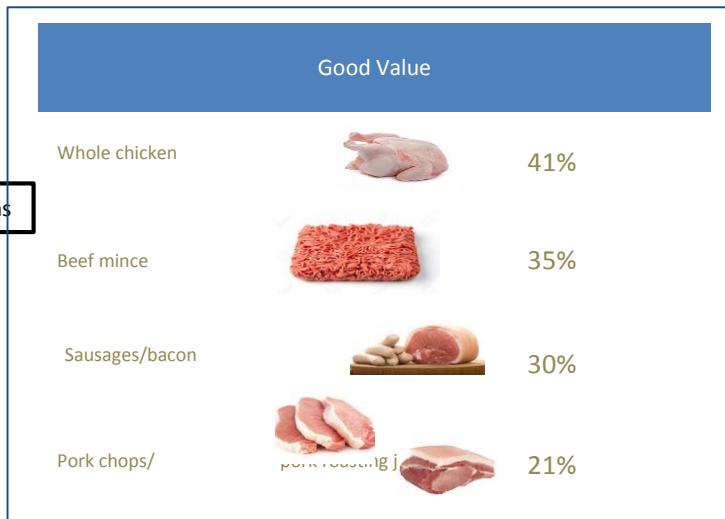
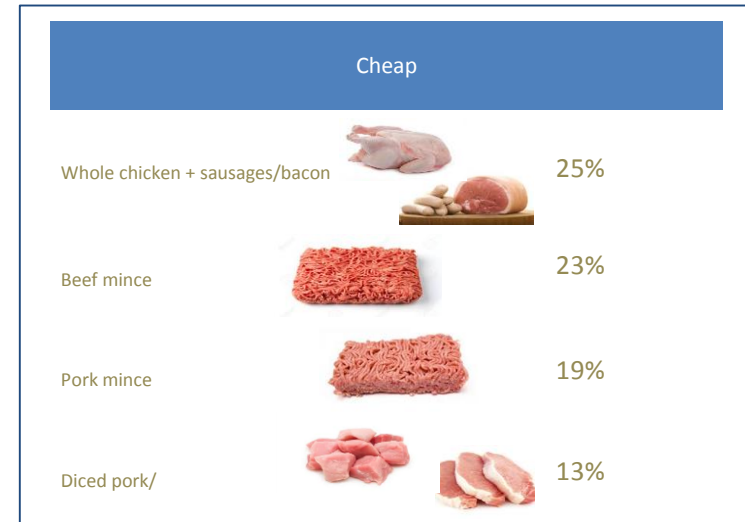
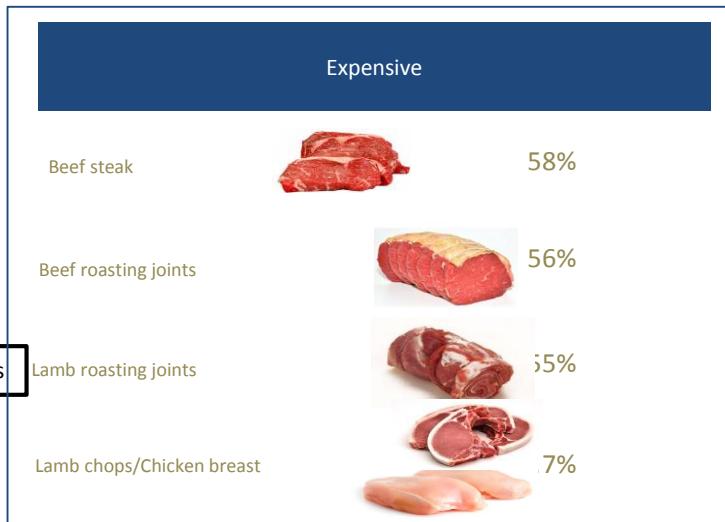


Base: All respondents in Meat 3 section (1026)

EQ15: Please select how you perceive the price of the following cuts of meat and fish?

EQ16: Please could you indicate if you feel the price that you pay for these types of meat and fish offers good value for money or not?

Excluding mince, beef is regarded as the most expensive meat



Price perceptions

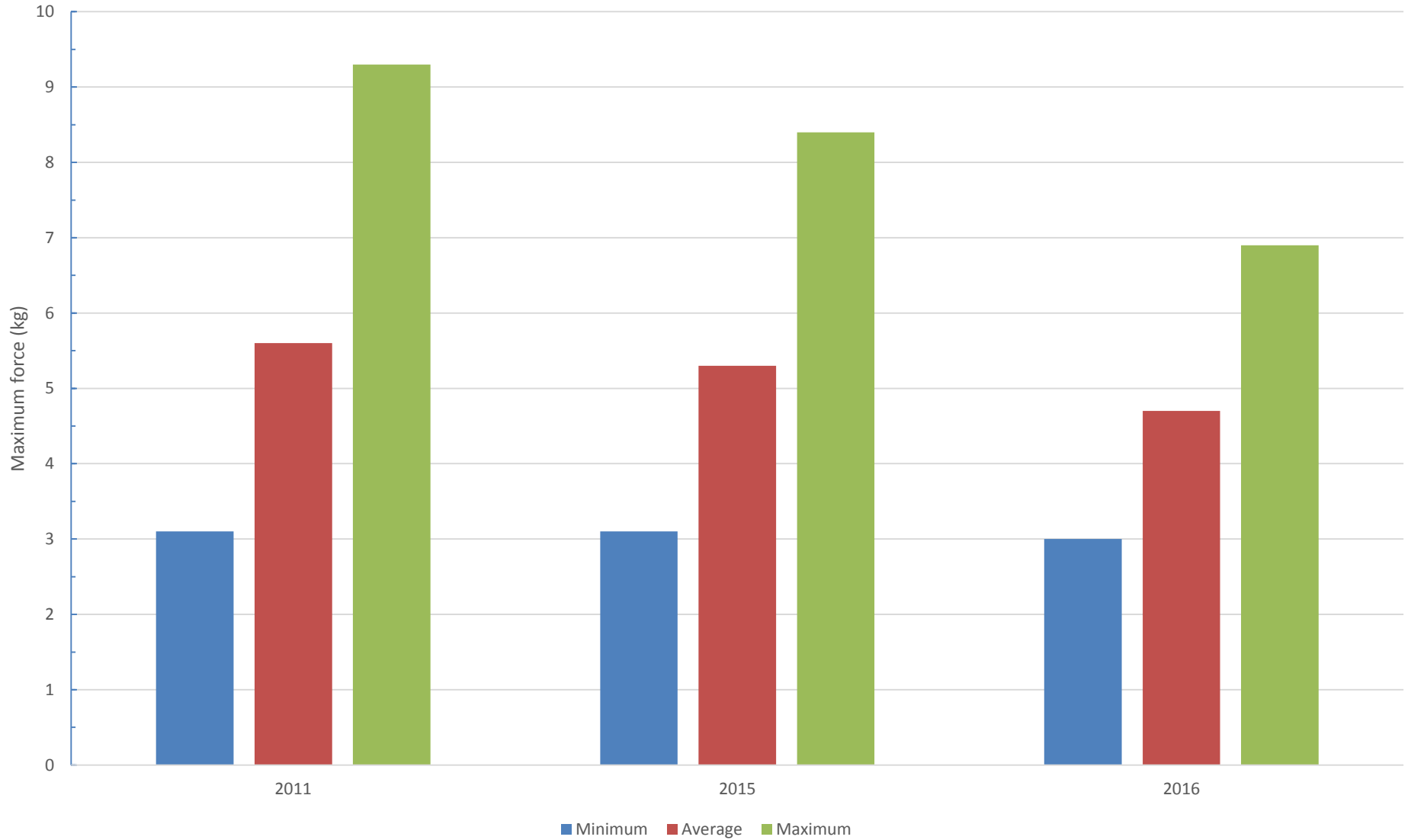
Value perceptions

Base: All respondents in Meat 3 section (1026)
 EQ15: Please select how you perceive the price of the following cuts of meat and fish?
 EQ16: Please could you indicate if you feel the price that you pay for these types of meat and fish offers good value for money or not?

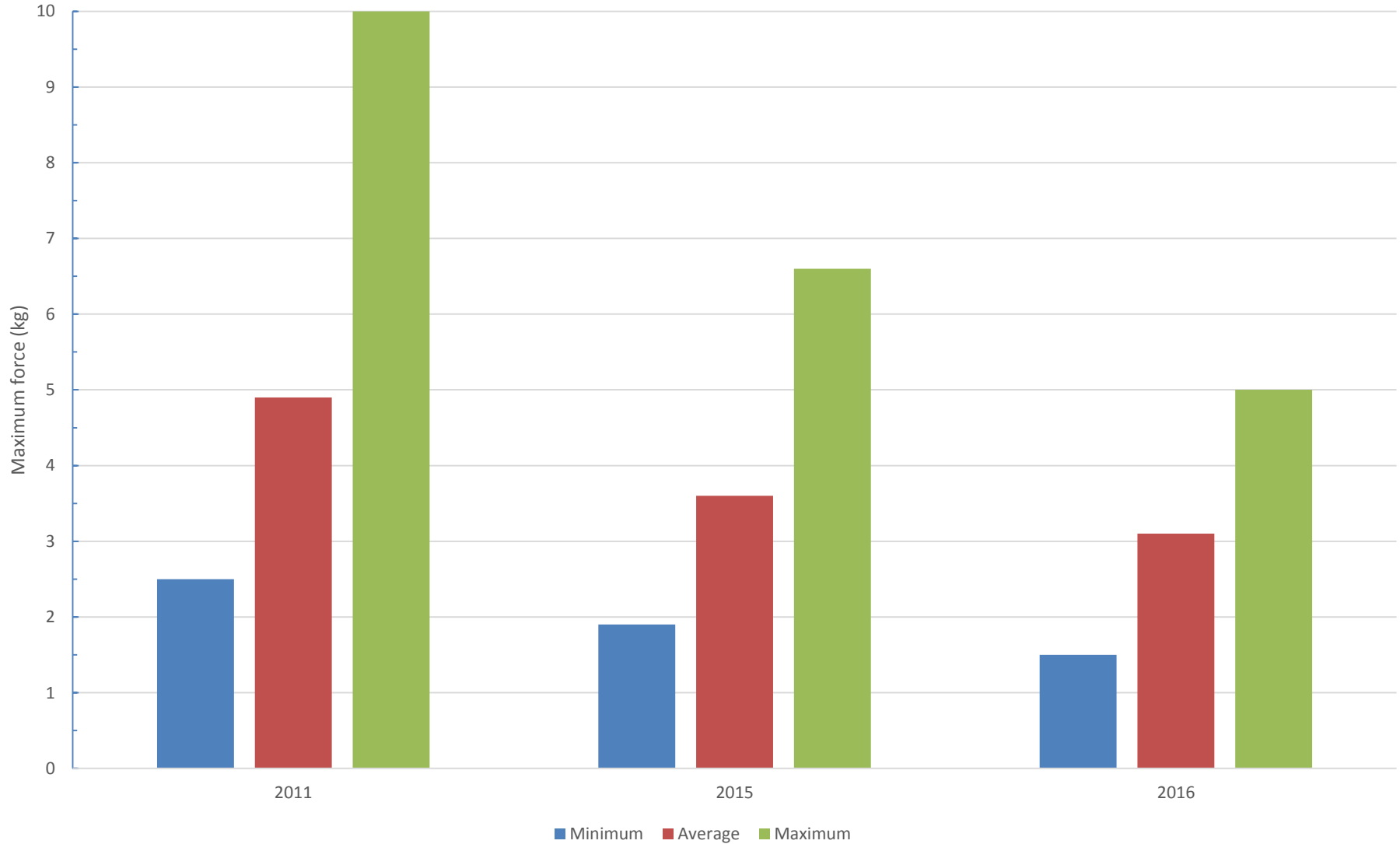
Retail survey 2016

- Samples were collected from 8 major retailers
- Random store and purchase allocation
- N= 80 steaks and 40 joints
- Compared results from similar earlier 2011 and 2015 surveys

Beef roasting joints



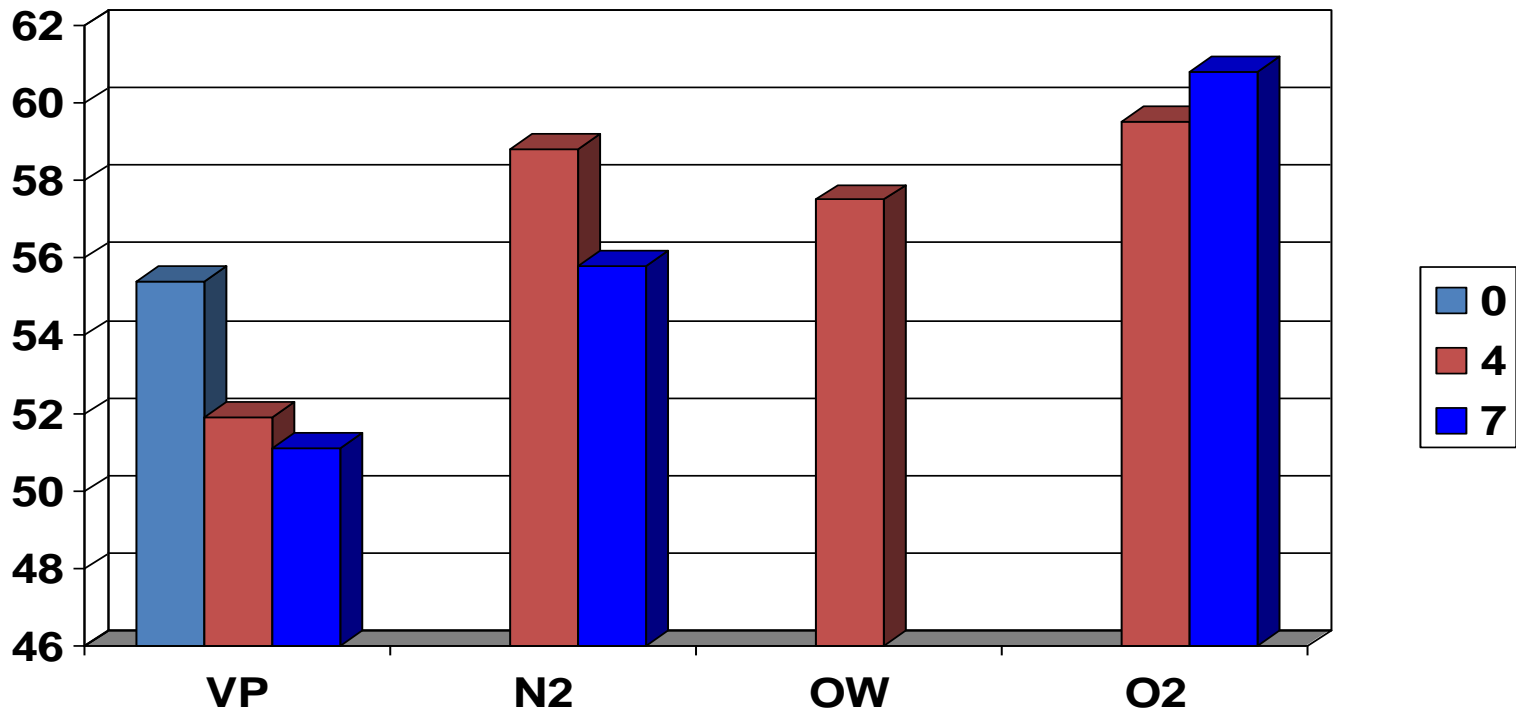
Sirloin steak



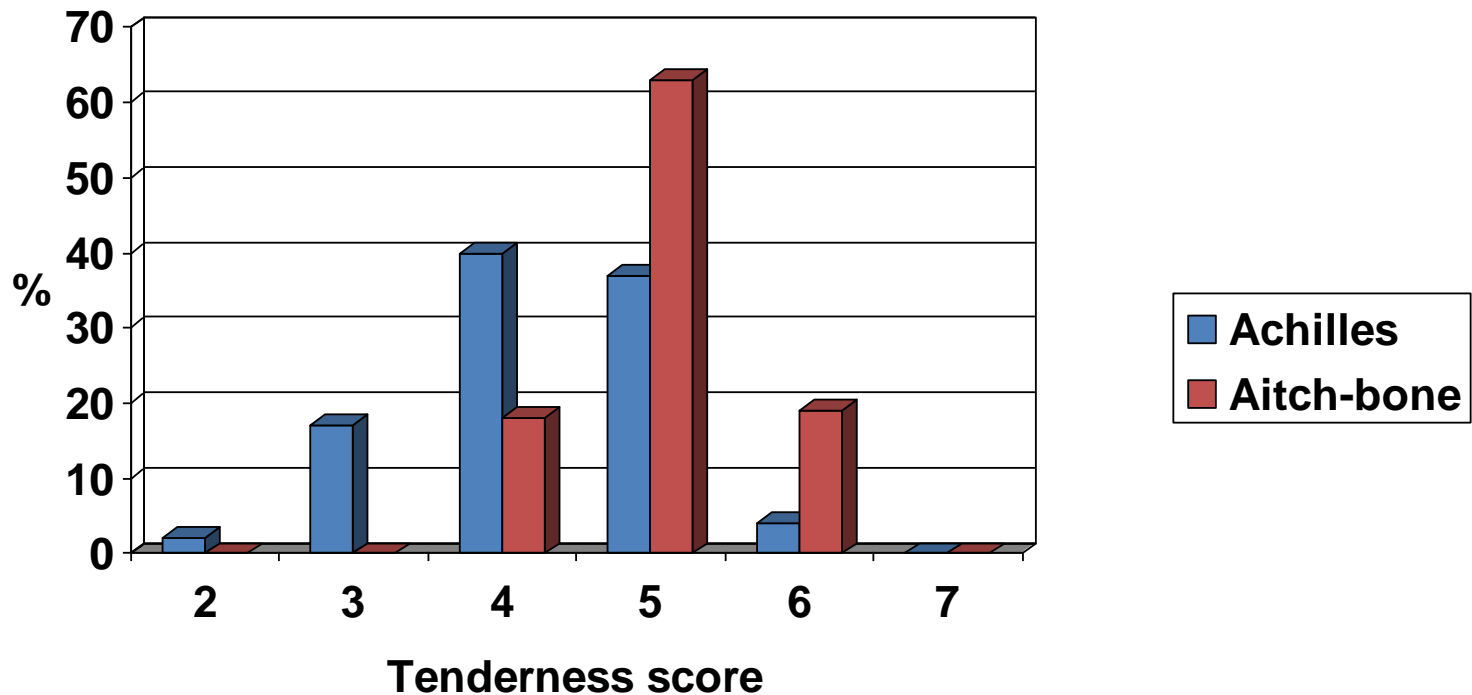
Why the improvements?

- Move to skin pac away from MAP
- More attention to detail on process
- However, the test only looks at shear on the individual muscle level
- Dissatisfaction may be linked to poor cutting spec and/or cooking practice
- Only one of these is within our direct control

Chewiness of beef following retail packaging treatments



Distribution of beef loin tenderness by suspension



Quality Standard Mark



Summary

- We are not in a bad place, with improvements seen over the recent past leading to an overall more consistent product
- Process controls have improved
- New packing methods employed with wide consumer acceptance
- Still some poor presentation with potential for dissatisfaction- must address (cutting spec)

Conclusions

- Overall beef quality has improved and is now more tender and more consistent
- Some dissatisfaction still exists
- Focus on specification and cutting/trimming may mitigate incidence
- Consumers increasingly focused on 'value for money' at any price point