Protein consumption and recent trends in the UK

Michaela Archer
March 2019

Summary
In recent years, there has been a shift towards more meat free diets, vegetarianism and veganism. The recent rise in popularity of lifestyle dietary changes is driven by perceived health benefits as well as by ethical concerns. Shoppers are still buying meat and fish; more units of meat and fish were purchased in 2018 compared with 2017, however the total volume of fish purchased declined. The servings of protein in foodservice increased over the same timeframe. As the dietary trends are driven by younger consumers, it remains to be seen how and to what extent they will impact on purchases of meat and fish in future. However, the reasons for dietary changes should not be underestimated; the food industry will increasingly be expected to accommodate ethical concerns and offer alternative protein choices.

This factsheet aims to provide an overview of the current data for protein consumption and sales of meat and fish in the UK and, whether UK consumers are really changing their protein consumption habits.

Introduction
In the past three years, UK media reports refer to the rise of veganism and vegetarianism in the UK, consumers choosing to avoid or reduce eating meat, and meat losing market share to non-meat proteins. There has also been increasing media attention around 'veganuary'[1], an annual campaign which has been running since 2014 to encourage people to eat a vegan diet for January. Underpinning some of the media coverage are a myriad of consumer surveys, showing significant increases in the number of people reporting to follow a meat-free diet.

Questions remain as to whether the shift towards veganism and vegetarianism is impacting on the current consumption of traditional types of protein and whether the current situation has longevity or is just a short-term trend.

Useful definitions
Two main protein categories referred to in this factsheet are;

- Animal or meat protein; includes meat, meat products, fish, seafood.
- Non-meat protein; vegetable based protein plus other types of protein derived from non-meat sources.

Different diets each have their own definition;

- A meat-free diet may include fish and shellfish.
- Pescatarian; eats seafood (finfish and shellfish), but not meat.
- Flexitarian; a primarily vegetarian diet but occasionally eats meat or fish.
- Vegetarian; does not eat meat or fish.
- Vegan; does not eat or use any animal or animal derived products.

[1] https://veganuary.com/

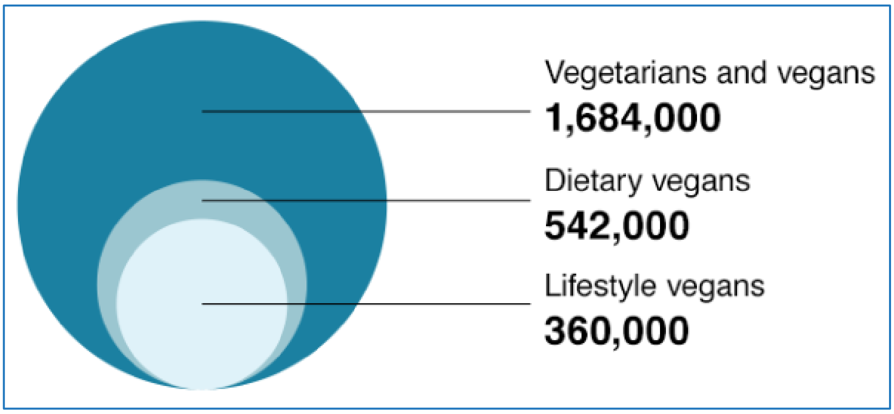
Estimates of the number of vegetarians and vegans in the UK

There is no official census of vegetarians and vegans in the UK; instead estimates from different surveys are available.

In 2017, the Food Standards Agency[2] surveyed 3,118 adults aged over 16 in England, Wales and Northern Ireland. This found the respondents who considered themselves vegetarian was 3%, with less than 1% stating they were vegan. This left 96% of those surveyed eating a diet including animal protein. Extrapolating these figures to the UK population for mid-2017 (66.04m)[3] would result in an estimate of 1.98m vegetarians and 0.66m vegans.

An Ipsos MORI survey[4] of 9,933 people aged 15+ in 2016 for the Vegan Society, identified that 3.25% of GB adults never eat meat of any form as part of their diet. The Vegan Society extrapolated to an estimate of around 0.54m vegans in Great Britain in 2016 (see Fig. 1), whilst also suggesting a significant rise in the estimated number of vegans from previous years.

Figure 1 – Estimate of the number of vegetarians and vegans in Great Britain



Reference BBC[5]

Recent surveys on vegetarian and vegan trends

Surveys or polls should be seen as indicative, as respondents typically provide an answer they think they should rather than reality, however they provide valuable insight into current consumer thinking. In the past year, a number of studies or surveys exploring UK consumer diets have been released, all showing varying estimates and opinions on what is happening with the rise of meat-free diets. However they all have shown some similar findings; UK diets are changing, with non-meat, vegetarian or vegan diets increasingly popular.

In 2018, Kantar Worldpanel[6] published figures showing 29% of evening meals contained no meat or fish, compared with 28% in 2016 and 27% in 2015 and 2014. But the rise of

2 https://www.food.gov.uk/sites/default/files/media/document/food-and-you-w4-combined-report_0.pdf
3 https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland
4 https://www.ipsos.com/ipsos-mori/en-uk/vegan-society-poll
5 https://www.bbc.co.uk/news/business-44488051
6 https://www.kantarworldpanel.com/en/PR/Why-2018-is-the-year-Brits-went-vegan

vegan and vegetarian diets does not necessarily mean consumers are moving away from meat overall; Kantar reported fresh meat and poultry had a strong year in 2017.

In April 2018, the Grocer[7] reported on a Harris Interactive survey of more than 2,000 people. 6% of those surveyed said they were vegetarian, 4% pescatarian, and 2% vegan. If this is extrapolated to the UK population, it suggests 7.8m people no longer consume meat, with 3.9 million identifying themselves as vegetarian. The intention to change their diet and reduce meat consumption in the next twelve months was agreed by 25% of those surveyed. The reasons why people changed their eating habits included concerns around animal welfare and the environmental impact of meat. This survey found the trends are more apparent amongst younger consumers compared with the over 55's age group. However, of those surveyed, 50% found plant based alternatives more expensive than meat, whilst 48% agreed that meat contains important nutrients and is a vital part of a healthy diet.

In May 2018, BMG Research[8] surveyed a representative sample of 1,507 adults living in GB. Their findings showed 12% of those who eat meat may consider changing to a vegan diet. This figure increases for those who considered themselves vegetarian (21%) or pescatarian (25%). Of those surveyed, vegetarian and pescatarian diets were more popular than vegan diets (3% and 4% of those surveyed respectively, compared to less than 1% vegan). Just under one fifth of those surveyed said their meat consumption had recently decreased. If those surveyed changed to a vegan diet, they would miss meat, notably chicken, beef and fish (excluding shellfish). The survey indicated the main reason to consider a vegan diet is for health benefits.

Data from IGD ShopperVista[9], based on a survey of 2,055 British shoppers, showed 1 in 6 shoppers either follow or are considering a vegan diet. In the age group 18-24, this rose to 1 in 3 shoppers. The findings indicate that the increased adoption of plant-based diets is not a fad; the reasons for shoppers changing their habits (health, ethical concerns) are not going away. This is particularly apparent in the younger generation (18-24), who are more socially conscious and will require the food industry to adapt to meet their expectations.

Attracting media attention in late 2018, Compare the Market[10] surveyed 2,000 adults in the UK. Their findings suggested 7% of those surveyed are vegan, 14% are vegetarian, and 31% of those polled are eating less meat than they used to. This suggests the UK now has 3.5 million vegans, up from 0.54 million compared to two years before. However, the questions were around people's intentions to change to being vegan or being vegetarian, if they wanted to reduce their impact on the planet.

In October 2018 a YouGov survey[11] of 2,008 people was undertaken, where half the respondents were 'millennials' (aged 20-35) and 'Generation X' (aged 36-53). When

7 https://www.thegrocer.co.uk/home/topics/future-of-meat/12-of-brits-follow-meat-free-diet-the-grocer-research-shows/565771.article
8 https://www.bmgresearch.co.uk/veganism-britain-today-seven-key-facts/
9 IGD ShopperVista; Veganism: millennial fad or fact?
10 https://www.comparethemarket.com/car-insurance/content/cars-against-humanity/
11 YouGov, Restaurant Consumer Survey, 2018

asked what types of restaurants will be most in demand in the next two years, 75% of millennials predicted vegan, vegetarian or those with environmental credentials.

In November 2018, Mintel[12] provided an overview into their latest research on the UK meat-free foods market. They report that in 2017, more than half of new product launches in the meat-free foods market were vegan or contained no animal ingredients, a rise from 28% in 2014. It suggests that the appeal of meat-free foods extends beyond vegans; 56% of UK adults ate a vegetarian / meat-free food in the six months to July 2018. The meat-free foods market was estimated to reach £740m in 2018. The 22% growth in sales of meat-free products seen from 2013 to 2018 is expected to continue to increase by a further 44% by 2023, to £1.1bn. Their findings showed 34% of meat eaters reduced their meat consumption in 2018, with younger age groups (25-34) most likely to have done so.

In autumn 2018, Waitrose released a report[13] which included a feature 'the new vegetarian revolution'. This was based on a poll of 2,000 adults who shop across different retailers, as well as analysing transactions in Waitrose stores. The headline findings were; 33.5% of the population are cutting down or cutting out meat; 21% are flexitarian; 9.5% are vegetarian and 3% are vegan. However, more than half of those describing themselves are vegetarian or vegan do sometimes eat meat. The main reasons for changing to meat free diets are (in order); animal welfare, health, environmental concerns, dislike of the taste of meat, better tasting food, fashion. People are looking for meat free inspiration through the week.

The latest report[14] from Nielsen shows 21% of shoppers are actively seeking vegetarian and vegan options, more than those seeking organic and sustainably produced. 25% are replacing meals containing meat with vegetarian/vegan options, with 10% eating vegetarian/vegan options at least once a week. The vegan shopper is younger (less than 35 years old), pre-family, typically living in London and the South West and more likely to shop online. According to their latest survey, 9% of households have a vegetarian or vegan member.

Protein consumption and consumer purchases

Protein consumption

Defra[15] family food provides data on trends of food purchased for UK consumption over a number of years. The data on meat, fish and soya/novel proteins shows the main sources of dietary protein are meat and to a much lesser extent fish, with a comparatively small, but increasing, quantity of soya and novel protein foods consumed (Fig. 2).

---

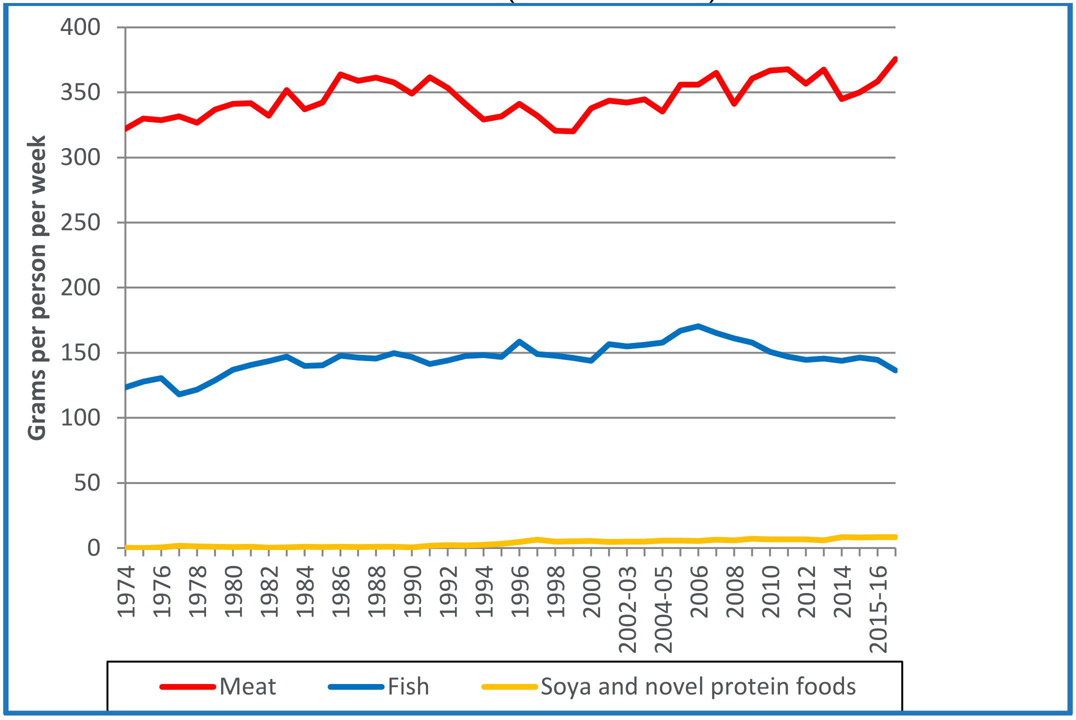
12 http://www.mintel.com/press-centre/food-and-drink/more-than-half-of-all-meat-free-new-product-launches-in-the-uk-carry-a-vegan-claim-1

13 https://www.waitrose.com/content/dam/waitrose/Inspiration/Waitrose%20&%20Partners%20Food%20and%20Drink%20Report%202018.pdf

14 Nielsen, Unpicking vegetarian and vegan

15 https://www.gov.uk/government/statistics/family-food-201617

Figure 2 - Quantity of meat, fish and soya/novel protein purchased for consumption in UK households (1974 to 2016-17)



Reference Defra

Meat; the most popular types of meat consumed at home are chicken, beef, lamb, pork. Processed meat including bacon and ham, meat pies, sausages and burgers have generally been stable or show slight downward trends over the last 10 years. Ready meals and convenience meat products continue their upward trend.

Fish; household purchases of fish and fish products have fallen steadily since 2006. Ready meals account for over one third of fish purchases.

Soya and novel protein foods have slowly increased their presence in UK home consumption.

Takeaway food; the quantities of main food types purchased from takeaways for consumption at home, is only available from 2011. This data shows that in 2016-17, meat purchases rose to 60g per person per week, whereas fish declined to 9 g per person per week. There is no data for non-meat protein.

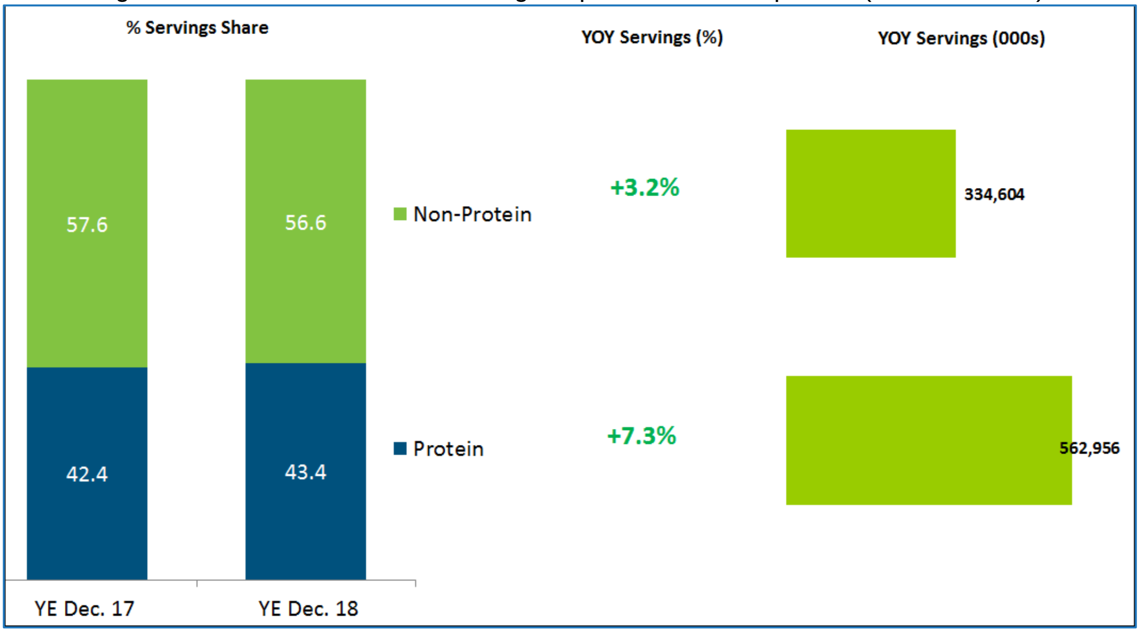
Consumer purchases; how meat and fish are performing in GB foodservice

All data is from NPD Crest, to year ending December 2018 (YE Dec. 2018)

The top line performance of GB foodservice shows an estimated consumer spend of £56.6bn, across 11.3bn visits. The total number of food and drink servings was 28.9bn.

Overall servings are shown in two main categories; protein and non-protein, however non-protein includes vegetables, chips etc., and so does not just depict non-meat protein sales. In this context, 'protein' includes meat and fish products. It is evident that overall 'protein' servings were in strong growth to YE December 2018 (+7.3% based on the previous year). 'Protein' also took a larger share of out of home servings. (Fig. 3)

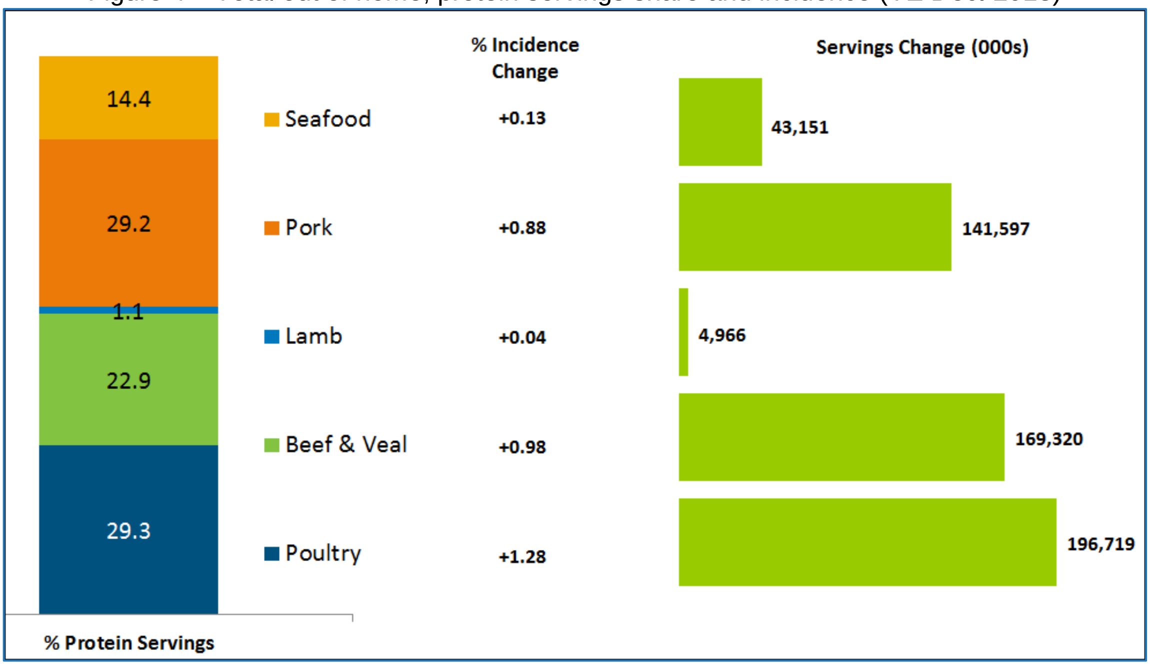
Figure 3 – Total out of home; servings of protein and non-protein (YE Dec. 2018)



Reference NPD

Looking in more detail at the protein purchases when eating out of home, in the YE Dec. 2018, all meat and seafood experienced growth. Poultry and pork were most popular, followed by beef & veal, seafood and, in last place, lamb. (Fig. 4)

Figure 4 – Total out of home; protein servings share and incidence (YE Dec. 2018)



Reference NPD

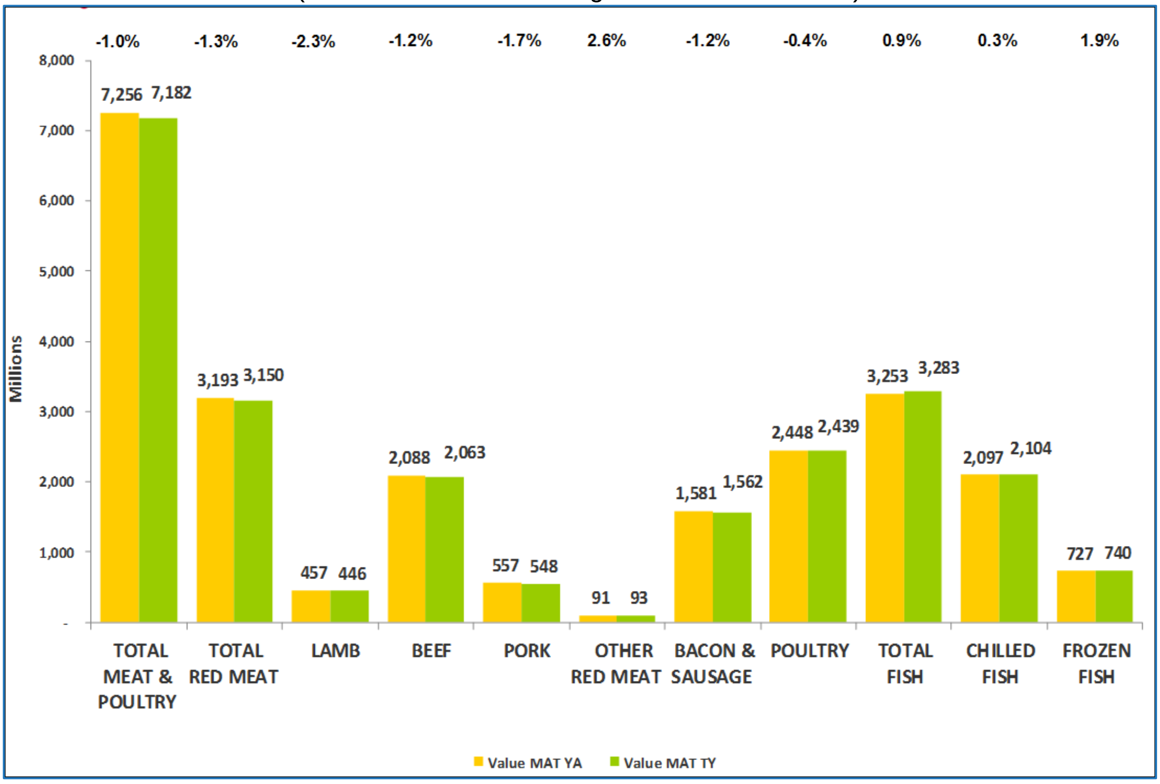
Consumer purchases; how meat and fish are performing in GB multiple retail

All data is from Nielsen.

In the 52 weeks ending 29th December 2018, the total spend on total meat and poultry fell to £7,182m (down 1% from previous year), reflecting reduced spend across each of the main meat protein categories (Fig. 5). Conversely, spend on fish (all seafood) increased to £3,283m (up from £3,253m in the same period in 2017).

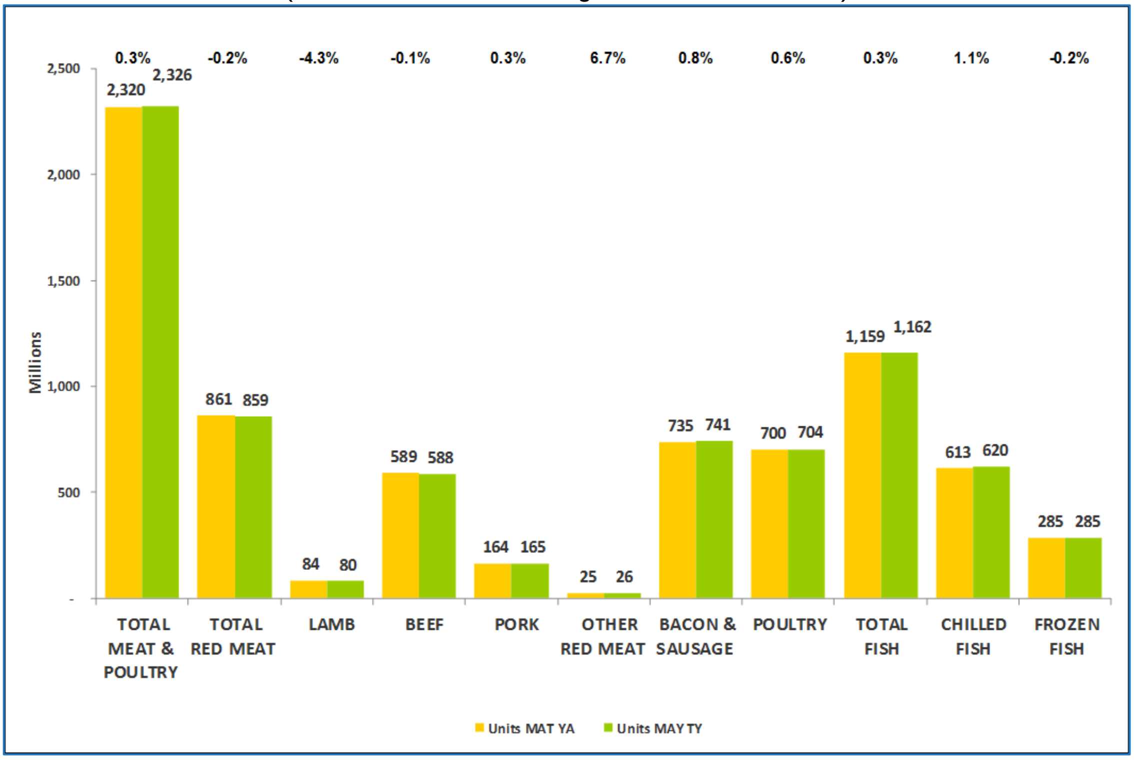
Despite the fall in sales value, the number of units sold across total meat and poultry rose by 6m (up from 2,320m to 2,326m) (Fig. 6). Seafood sales showed 3m more units sold than in the previous year (up from 1,159m in 2017 to 1,162m in 2018), driven by chilled fish. However, in the same period, the total volume of fish and shellfish sold was down nearly 4,000t, to just over 314,000t, whilst the average price per kg increased 2.2% to £10.45. Shoppers are clearly still buying fish in-store, but in less overall quantity than the previous year and for a higher cost per kg.

Figure 5 – Meat and fish categories, Value Sales (m), Total GB, moving annual total (52 weeks to week ending 29th December 2018)



Reference Nielsen

Figure 6 – Meat and fish categories, Unit Sales (m), Total GB, moving annual total (52 weeks to week ending 29th December 2018)



Reference Nielsen

Why UK consumers are changing what they buy

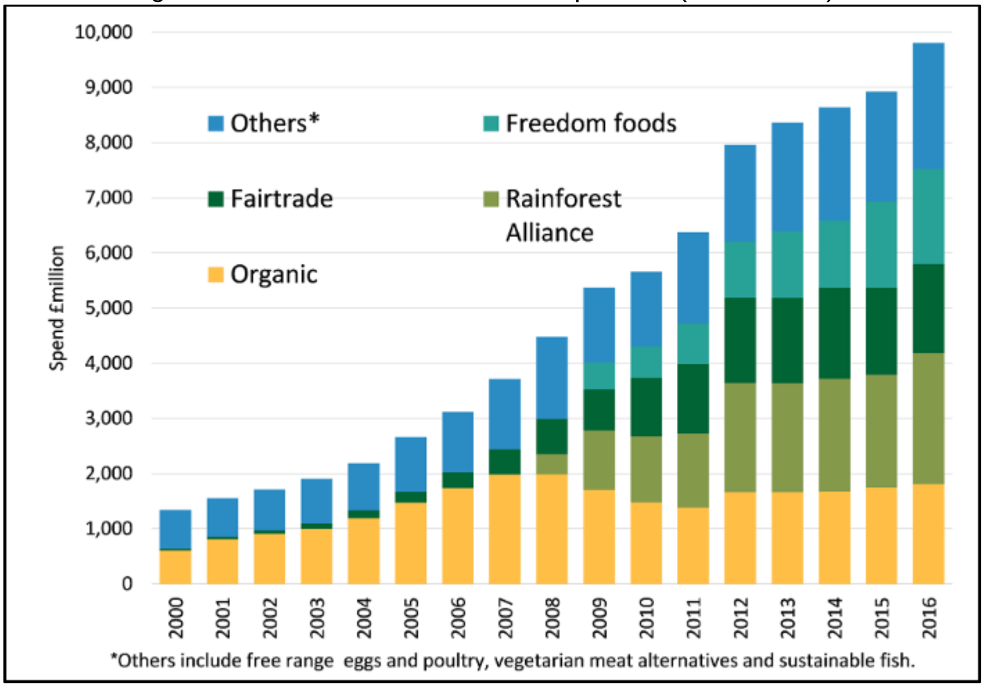
Consumer tastes are evolving, with a range of different dietary combinations or choices now being followed. In 2017, 'free from' foods were worth £1.1bn in value, up almost £200m on the previous year (Nielsen)[16].

There are many factors influencing consumers and why they make the choices they do. Ceasing to eat meat or animal products can be for cultural or religious reasons, ethical reasons (e.g. animal welfare), or dietary considerations (e.g. health).

The increasing importance of 'ethical' credentials (Fig. 7) depicts a 16 year trend of increasing consumer spend on 'ethical produce', from just over £1bn in the year 2000, to nearly £10bn in 2016. Spending on 'free range eggs and poultry, vegetarian meat alternatives and sustainable fish' has also increased over that time; however it appears to be relatively static from 2011 onwards (estimated around £2bn pa). It is impossible to know how much of this spend is only on vegetarian meat alternatives.

16 Nielsen, State of the Nation 2018

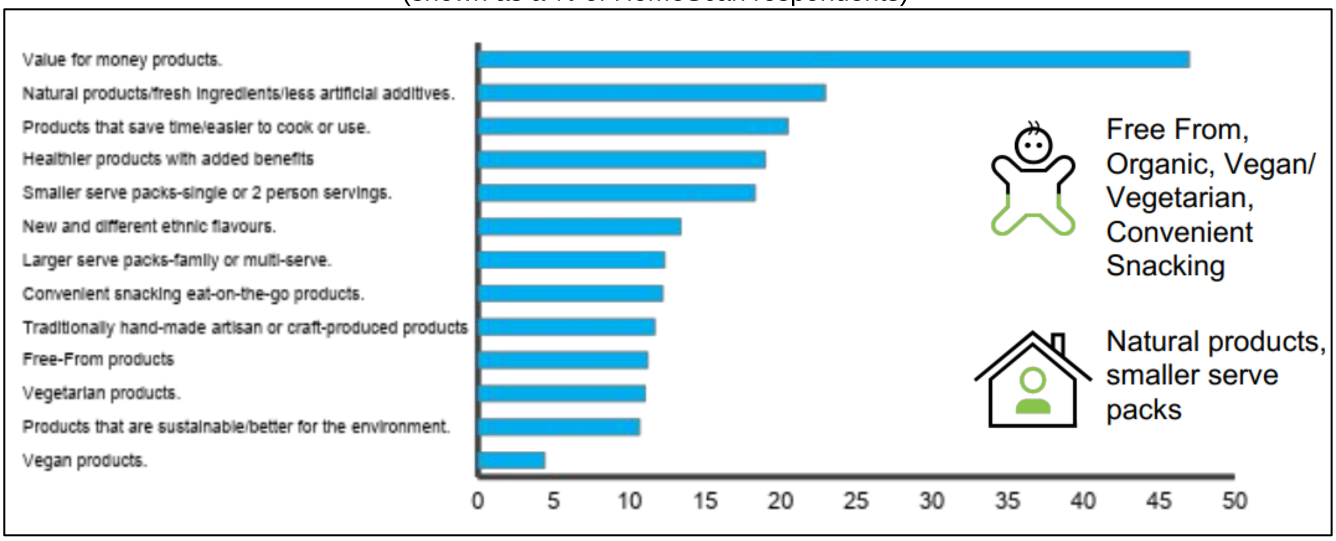
Figure 7 - UK trend in sales of ethical produce (Defra, 2018)[17]



Reference Defra

This trend is also reflected in the findings of Nielsen HomeScan data. HomeScan polls a panel of 15,000 UK consumers on an ongoing basis to determine their habits and preferences. Whilst value for money, natural products and convenience are still of greatest importance, 'free-from', vegetarian, sustainable products/better for the environment and vegan are also important, and are actively sought by around 10% or less of those surveyed (Fig. 8), indicating their increasing importance to UK consumers.

Figure 8 – Credentials consumers are looking for in new food and drink purchases (shown as a % of HomeScan respondents)



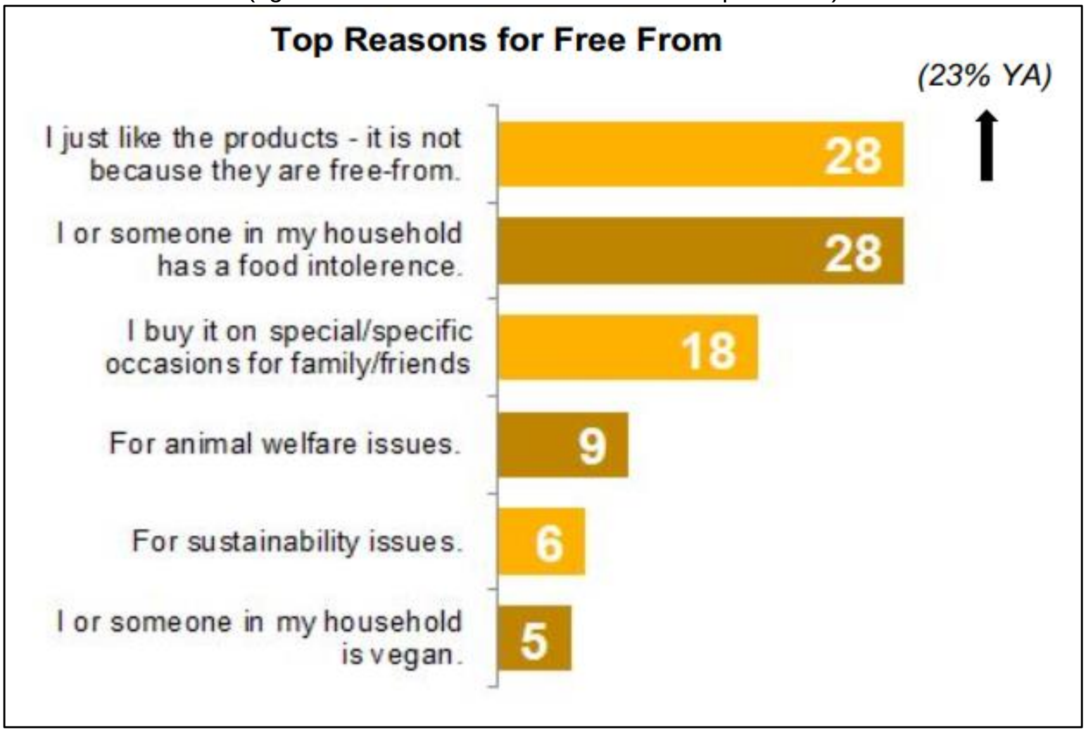
Reference Nielsen

---

[17] https://www.gov.uk/government/publications/food-statistics-pocketbook/food-statistics-in-your-pocket-prices-and-expenditure

The appeal of ‘free from’ is also increasing; of those polled, the frequency of purchase increased from 35% to 41% between 2016 and 2017. The main reasons for purchase are personal choice or due to dietary restrictions, however ethical credentials are also driving these purchases (Fig. 9).

Figure 9 – The main reasons provided for why people buy ‘free from’
(figures shown as a % of HomeScan respondents)



Reference Nielsen

Key takeaways

- Animal protein remains popular with over 90% of UK consumers still including meat and fish in their diet. For at home consumption, the past ten years has seen an increased shift towards convenience foods and ready meals (which will typically contain less protein than a joint of meat).

- Shoppers are still buying meat and fish; current data from Nielsen shows more units of meat and fish were purchased in 2018 compared with 2017, however the total volume of fish purchased declined. The servings of protein in foodservice increased over the same timeframe.

- Recent polls indicate that a proportion of consumers are opting to reduce their intake of meat and fish, switching to replace some meals with meat-free / fish-free options.

- Consumers are also adopting different diets to avoid eating meat and fish, with a vegetarian diet still the most popular dietary change, followed by pescatarian then vegan. The incidence of the different diets has increased in recent years.

- The recent rise in popularity of 'lifestyle' dietary changes is driven by perceived health benefits as well as by ethical concerns. As the trends appear to be driven by younger consumers, it remains to be seen how and to what extent these trends will impact on purchases of meat and fish in future.

- The reasons for younger consumers to change their diets are important and should not be considered as just a current fad. They will expect the food industry to make changes to accommodate the increasing importance of 'free from' and embed ethical practices in food products on sale.

- Other factors are currently impacting on animal protein purchases, with value for money a significant consideration for UK shoppers and diners at present. In addition to health and ethical concerns, current high food prices are also likely to be having a significant influence on people's decisions to continue eating as much meat/fish as they used to.

References

- BBC (June 2018), Veganism: Why is it on the up? https://www.bbc.co.uk/news/business-44488051
- BMG Research (May 2018), https://www.bmgresearch.co.uk/veganism-britain-today-seven-key-facts/
- Compare the Market survey, Cars against Humanity, (2018), https://www.comparethemarket.com/car-insurance/content/cars-against-humanity/
- IPSOS MORI (2016), Incidence of Vegans Research, Poll Conducted for The Vegan Society - https://www.ipsos.com/sites/default/files/migrations/en-uk/files/Assets/Docs/Polls/vegan-society-poll-2016-topline.pdf
- Defra, Family Food 2016-17, https://www.gov.uk/government/statistics/family-food-201617
- Defra, Food Statistics in your pocket: Prices and expenditure: 22 November 2018, https://www.gov.uk/government/publications/food-statistics-pocketbook/food-statistics-in-your-pocket-prices-and-expenditure
- Food Standards Agency (2017), The Food & You Survey, Wave 4, Combined Report for England, Wales and Northern Ireland: https://www.food.gov.uk/research/food-and-you/food-and-you-wave-four and https://www.food.gov.uk/sites/default/files/media/document/food-and-you-w4-combined-report_0.pdf
- Full fact checker - https://fullfact.org/health/vegans-uk/ and https://fullfact.org/health/vegetarian-vegan-uk/
- Grocer survey (April 2018), https://www.thegrocer.co.uk/home/topics/future-of-meat/12-of-brits-follow-meat-free-diet-the-grocer-research-shows/565771.article
- Grocer (July 2018) https://www.thegrocer.co.uk/home/topics/future-of-meat/what-uk-shoppers-think-about-meat-free-and-plant-based-in-12-charts/568844.article
- Guardian (November 2018) https://www.theguardian.com/business/2018/nov/01/third-of-britons-have-stopped-or-reduced-meat-eating-vegan-vegetarian-report
- Kantar Worldpanel (January 2018), Why 2018 is the year Brits went vegan, https://www.kantarworldpanel.com/en/PR/Why-2018-is-the-year-Brits-went-vegan
- Mintel (November 2018), http://www.mintel.com/press-centre/food-and-drink/more-than-half-of-all-meat-free-new-product-launches-in-the-uk-carry-a-vegan-claim-1
- Office of National Statistics (2017), Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland
- Planday, 2018, YouGov survey - Restaurant Consumer Survey
- Waitrose, Food and Drink Report 2018-19, https://www.waitrose.com/content/dam/waitrose/Inspiration/Waitrose%20&%20Partners%20Food%20and%20Drink%20Report%202018.pdf

Foodservice and retail data sources (available from Seafish to market data subscribers)

- NPD Crest, Foodservice data to year ending December 2018.
- Nielsen, State of the Nation, 2018.
- Nielsen Protein Context Report, data to week ending 29th December 2018
- Nielsen Context Report to year ending 29th December 2019
- IGD ShopperVista, Veganism: millennial fad or fact? October 2018
- Nielsen, Unpicking vegetarian and vegan, 2019.

For more information on Seafish market data go to our website
https://www.seafish.org/article/market-insight