

# Mike Whittemore

## Head of Trade Marketing

# Topics

- The UK Market
- Eblex trade marketing key objectives
- Inspiration/ideas
- Cut programme
- Regional branding/processor support
- Promotional activity/support



# IGD grocery retail market sizes

Top 10 European markets 2012

Ran k	Country	Grocery retail market (£bn)
1	Russia	198.5
2	France	179.3
3	Germany	171.3
<b>4</b>	<b>United Kingdom</b>	<b>153.4</b>
5	Italy	104.5
6	Spain	77.0
7	Turkey	55.0
8	Switzerland	37.7
9	Poland	30.7
10	Belgium	29.3

Top 10 global markets 2012

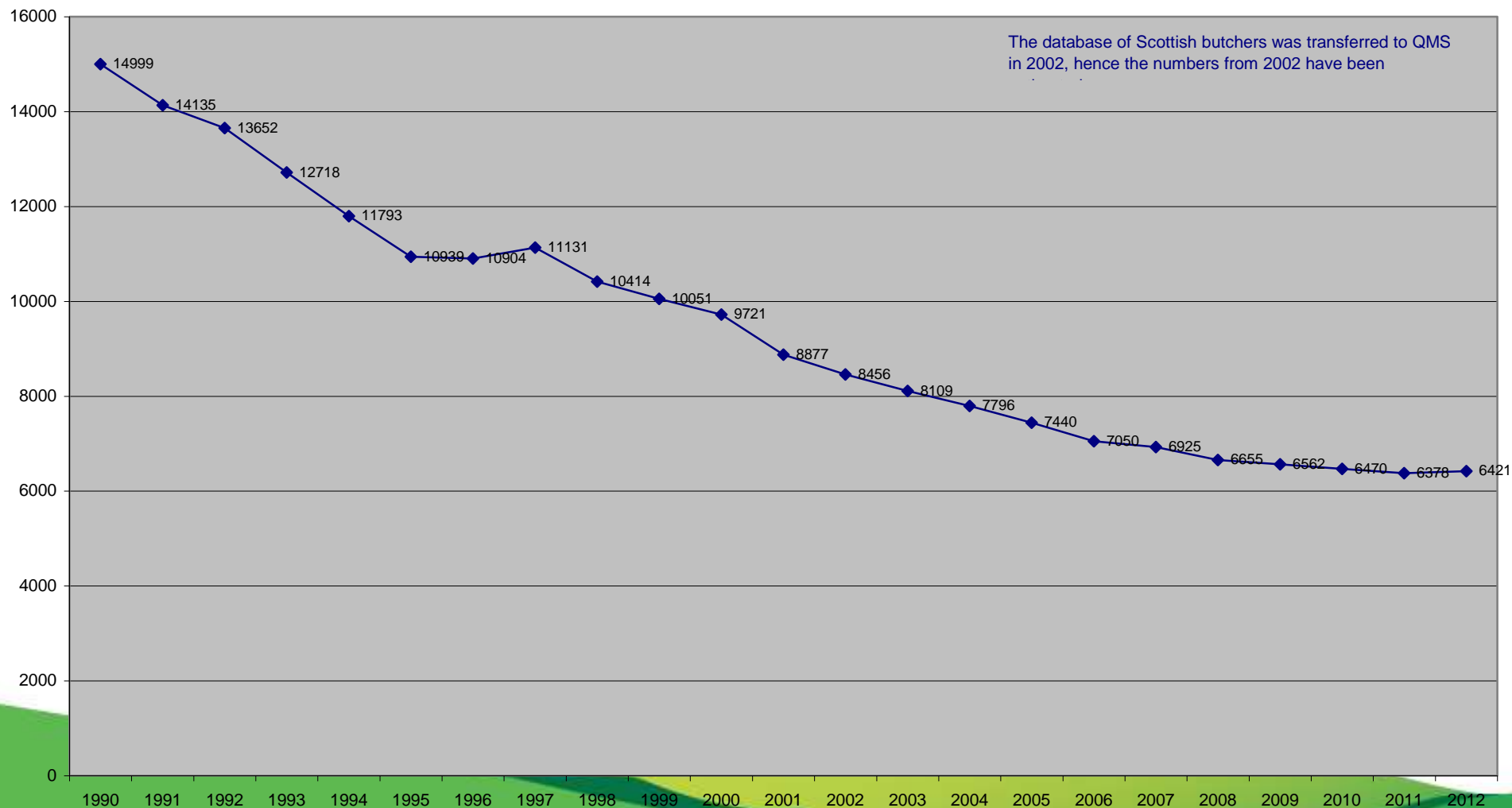
Ran k	Country	Grocery retail market (£bn)
1	China	684.2
2	USA	594.4
3	Japan	258.1
4	India	327.2
5	Brazil	208.3
6	Russia	198.5
7	France	179.3
8	Germany	171.3
<b>9</b>	<b>United Kingdom</b>	<b>153.4</b>
10	Indonesia	106.5

# Top grocery retailers

Retailer	Grocery sales 2012 (£m)	% Change in grocery sales 11- 12	Number of grocery stores 2012	UK sales area (sq ft)
Tesco	44,600	2.6%	3,141	39,890,897
Sainsbury's	23,159	3.9%	1,112	21,288,055
Asda	22,800	4.5%	532	18,500,406
Morrisons	17,915	2.5%	498	13,420,992
The Co-operative	7,511	2.2%	2,889	12,910,514
Marks & Spencer	5,785	2.9%	702	4,628,234
Waitrose	5,416	6.8%	290	5,140,478
Aldi	3,600	30.1%	465	4,124,300
SPAR UK	2,886	2.6%	2,600	4,002,022
Musgrave	2,868	2.1%	2,484	4,085,830
Lidl UK	2,720	11.0%	635	6,083,224
Iceland	2,478	-4.0%	750	3,697,403

Note: excludes Cash & Carry and Members Club operations

## Independent Butcher Numbers (England, Scotland and Wales) 1990 - 2012



# Key Objectives

## Active NPD Programme

- To provide consumers with new, added value products and provide the supply chain with sustainability and profit opportunities.

## Consumer Education

- To provide consumers with cooking advice, health, diet information and the benefits of red meat as a meal provider in and out of the home.

## Quality Assurance

- Continuing to develop and market the QA scheme to consumers whilst demonstrating the benefits of membership to the supply chain.
- Continue to deliver and highlight key messages in relation to welfare, the environment and our farming heritage.

# Key Objectives

## SME Development

- Assist the small to medium supply sector by improving efficiency.

## Regional Brands

- Continue to maximise opportunities with regional brands to deliver better returns through the supply chain, sustainability in the industry and have synergy with the consumer preference for provenance.

## Veal

- Address supply issues, consumer awareness, cut development and marketing support for the retail and foodservice sectors.

# Sector Specific

Developing promotional and marketing programmes specific to each sector

- Supply chain
- Foodservice
- Independents
- Multiple retailers



# Inspiration/Ideas



# USA



# Flat iron



# The Denver Cut

**Original Name\*** 116D (WPS/NAMP)  
Beef Chuck, Under Blade, Center (W) or  
remove Under Blade from the whole 116A  
(WPS/NAMP) Beef Chuck, Chuck Roll

**USMS Name\*\*** Beef Chuck Under Blade  
Center Steak Boneless

\*The Meat Buyer's Guide, NAMP

\*\*Uniform Retail Meat Identity Standards



## CUTTING GUIDE

**1** Start with the 116A (WPS/  
NAMP) Beef Chuck, Chuck Roll.  
The Chuck Roll can be further  
divided into two components,  
the Chuck Eye Roll (WPS/NAMP)  
116D (a) and the Under Blade  
Roast (WPS/NAMP) 116E (b).



**2** Separate the Chuck Eye Roll  
(a) from the Under Blade (b).



**3** 116E Beef Chuck Under  
Blade Roast. The Under Blade  
is comprised of three muscles:  
Rhomboides (c), Splenius (d)  
and Serratus Ventralis (e).  
Remove (c) from the Under  
Blade by following the natural  
seam. This muscle (c) can be  
used for stew or cubed steak.



**4** Remove Splenius (d) from  
the Under Blade following the  
natural seam. This muscle can  
be used as an alternative to  
flank steak.



**5** 116G Beef Chuck, Under  
Blade, Center (W) untrimmed.



**6** Remove all surface fat and  
connective tissue. Then, remove any  
internal fat pockets exceeding 1/4  
inch in diameter.



**7** Starting at the posterior  
(thickest) end, cut steaks  
end-to-end, 3/4 to 1-inch thick.



**8** Denver Cut Steaks.



# Whilst in Great Britain...



# Evolution

**1927**



**2013**



**1950**



**2013**

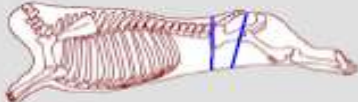













# Rump steak examples

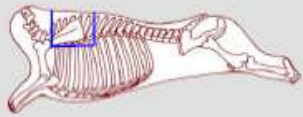











# Rump cuts x3

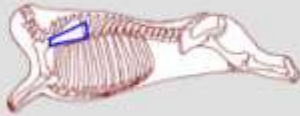









“Premium” Prime Rump Steaks			Rump B003
			
1. Position of the rump.	2. Boneless untrimmed rump with the tail muscle (TFL) removed.	3. Remove the cap muscle by cutting along the seam between it and the rest of the rump.	4. Separate the remaining two muscles by cutting along the seam between them.
			
5. Remove excess fat, gristle and connective tissue to leave exposed lean surfaces.	6. Slice the centre rump muscle evenly across the grain into...	7. <u>“Premium” Prime Rump Steak.</u>	8. Slice the side rump muscle evenly across the grain into...
			



# Denver Steak

Denver Steak			Chuck B025
			
1. Chuck roll.	2. Remove yellow gristle (back strap).	3. Follow the natural seam of the top muscle of the chuck roll starting with the chuck eye and remove.	4. Remove the crest muscle (Rhomboides).
			
5. Discoloured tissue and gristle is to be removed from the spider muscle (Serratus ventralis).	6. Cut spider muscle into steaks along the grain as illustrated.	7. Denver steaks	8. Denver steaks
			

# Flat Iron Steak

Flat Iron Steak			Chuck B013
			
1. Position of the feather.	2. Untrimmed feather muscle.	3. Remove all visible external fat and gristle.	4. Remove the muscle and gristle at the anterior end of the feather muscle.
			
5. Separate the feather into two parts by carefully cutting on and along the central gristle sheath.	6. Remove the gristle sheath.	7. Cut into portions of the required sized and score diagonally.	8. These portions are ideal for marinating.
 <p>For this product the feather should be matured for a minimum of 14 days.</p>			

# The Cuts

- Bistro rump steak
- Prime rump steak
- Picanha steak
- Centre cut steak
- Flat-iron steak
- Denver steak



Bistro Steak



Flat-Iron Steak



Prime Rump Steak



Centre Cut Steak



Picanha Steak



Denver Cut Steak

# Cut programme initiatives





### Enjoy Beef

Provide consumers with value product options through NPD programme, consumer facing marketing initiatives and supply sustainability.

**“Keep beef on the menu”**



### Lamb Plan – Discover lamb

Continue into the second year of the lamb plan. Developing new cuts, enhancing the image of lamb to the consumer and maximising carcass utilisation and value.

**“Get lamb on the menu”**



#### Steaks

Alternative value steaks utilising the forequarter and NPD.

**Steak Bar**

#### Bone-in Cuts

Further develop carcass utilisation and profit from premium bone-in cut propositions.

**Chop House**

#### Seasonal Activity

Cut and meal solutions linked to seasonal campaigns /cut programme/5<sup>th</sup> quarter opportunities and gap analysis. Encourage consumers to enjoy cooking through recipe support and SP activity and market relevant products and cuts for the foodservice supply chain.

**Cook-in Eat-Out**

#### Roasts

New roast cut solutions and products to suit two people, representing modernity and value.

**The Carvery**

#### Adding value to mince

Maximise mince product profitability. Taking advantage of market opportunities.

**Gourmet Burgers**

**Discover Lamb Phase 2**





An excellent range of premium quality steaks.

Highlighting new and traditional steaks.

Providing consumer education and recipe support in-store.

Encouraging modern merchandising formats, packaging and labeling



## Steak Bar – Server-over counter

- For your cabinet, there is cabinet backing stand that will highlight your steak range to customers.
- Cabinet cards are available for each cut.



## Steak Bar – On-pack



## Steak Bar – New technology



## Steak Bar – Consumer education

- A 16-page consumer booklet provides your customers with comprehensive details on the range of steak cuts and their different attributes.
- The guide also includes information on how to cook the perfect steak along with some tasty recipe ideas.
- Steak and chips leaflet available.



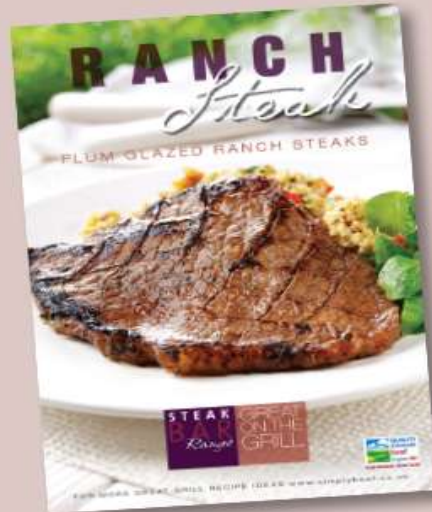
## Steak Bar – Point-of-sale



Everything your customers need to know about steaks ...it's all about steaks.  
Working with your current steak range or working with you to develop new ideas.











A new range of bone-in beef and lamb cuts  
for enhanced flavour and succulence

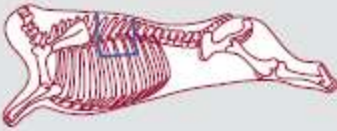








Delivering additional profit opportunities and carcass utilisation.

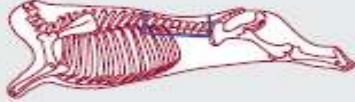










Tough standards. Tender results.





<p><b>CHOP</b> <b>HOUSE</b> <i>Range</i></p>	Club Steaks			<p>EBLEX Code: <b>Fore rib B010</b></p>
				<p>1. The fore rib should be removed from the carcass between rib bones 6-7 and 10-11 (counting from the neck upwards).</p>
	<p>2. The length of the tail is not to exceed 60mm from the outer tip of the eye muscle.</p>	<p>3. Remove the chine bone.</p>	<p>4. Remove the cap muscle following the natural seam of the rib eye...</p>	
				
<p>5. ...and trim the remaining fat to the rib bones.</p>	<p>6. French-trim the ribs to leave the bone exposed.</p>	<p>7. Cut and saw into 2cm thick club steaks. Each steak to contain half a rib bone.</p>		
				

Bone-In Sirloin Steak			EBLEX Code: Sirloin B018
			
1. Position of the 3 bone sirloins.	2. Bone-in sirloin with the fillet removed.	3. Separate the rib section by cutting in a...	4. ...straight line from the tip of the first rib.
			
5. Trim the tail to a maximum 25mm from the tip of the eye muscle. Remove part of the vertebrae as illustrated.	6. Remove paddywack and cut/saw sirloin section into steaks.	7. Bone-in Sirloin Steaks.	
			



## Adding value to the mince and burger market.

Utilising the chuck and the rump, developing and encouraging new products with enhanced flavours and textures.  
Further enhancement of lamb mince as a product proposition and minced veal opportunities.



**Tough standards. Tender results.**





These burgers are made with a mix of sun dried tomatoes, balsamic glaze and a touch of olive oil. They are easy to make and use the best quality ingredients available. They are also designed to be easy to adapt to your own tastes.



These burgers are made with a mix of beef, tartare mayo and a touch of olive oil. They are easy to make and use the best quality ingredients available. They are also designed to be easy to adapt to your own tastes.





## A new range of modern beef and lamb roasts

To address the decline in the red meat roast category in both retail and food service sectors by NPD programme, mini roasts, value forequarter cuts incorporating veal and lamb products



Tough standards. Tender results.



# Carvery Roastomatic

**THE CARVERY**  
QUICK-TASTY-MODERN

**ROASTOMATIC**

Everything you'll ever need to know about roasting beef. Where the cuts come from, cooking times, perfect gravy, how to carve, serving ideas hints & tips.



**QUALITY STANDARD beef**  
British

Tough standards. Tender results.

**ROASTOMATIC**

When buying your beef for roasting look for the Quality Standard Mark. You can then be confident that your beef has come from assured farms, and is consistent in quality, tenderness and succulence



**TOPSIDE**

**Position of the cut**



Taken from the hindquarter a lean boneless cut, with fine-grained texture.

**Cooking advice**

Gas mark 4-5, 180-190°C:  
Rare: 20mins per 450g + 20mins  
Medium: 25mins per 450g + 25mins  
Well done: 30mins per 450g + 30mins



**SILVERSIDE**

**Position of the cut**



Taken from the hindquarter a lean boneless cut, with fine-grained texture.

**Cooking advice**

Gas mark 4-5, 180-190°C:  
Rare: 20mins per 450g + 20mins  
Medium: 25mins per 450g + 25mins  
Well done: 30mins per 450g + 30mins



**THICK FLANK**

**Position of the cut**



Taken from the hindquarter a lean boneless cut, with fine-grained texture.

**Cooking advice**

Gas mark 4-5, 180-190°C:  
Rare: 20mins per 450g + 20mins  
Medium: 25mins per 450g + 25mins  
Well done: 30mins per 450g + 30mins



**BRISKET**

**Position of the cut**



Taken from the hindquarter a lean boneless cut, with fine-grained texture.

**Cooking advice**

Gas mark 4-5, 180-190°C:  
Rare: 20mins per 450g + 20mins  
Medium: 25mins per 450g + 25mins  
Well done: 30mins per 450g + 30mins

**ROAST  
OMATIC**

**ROASTOMATIC**



**ROAST TOPSIDE**  
WITH FENNEL AND GARLIC CRUST

FULL RECIPE AT:  
[SIMPLYBEEFANDLAMB.CO.UK](http://SIMPLYBEEFANDLAMB.CO.UK)



**ROAST SILVERSIDE**  
WITH CRISPY BACON, MUSTARD AND HERB

FULL RECIPE AT:  
[SIMPLYBEEFANDLAMB.CO.UK](http://SIMPLYBEEFANDLAMB.CO.UK)



**ROAST THICK FLANK**  
ORIENTAL STYLE

FULL RECIPE AT:  
[SIMPLYBEEFANDLAMB.CO.UK](http://SIMPLYBEEFANDLAMB.CO.UK)











**POT ROAST BRISKET**  
WITH REAL ALE

FULL RECIPE AT:  
[SIMPLYBEEFANDLAMB.CO.UK](http://SIMPLYBEEFANDLAMB.CO.UK)




# New Cuts

Leg Joints – Whole Leg (A) - continued			EBLEX Code: <b>Leg L040</b>
			
9. Remove the knuckle by cutting through the joint between the femur and tibia/fibula.	10. Lamb Shank EBLEX Code: Leg L022	11. The silverside section of the remaining muscle block is removed using a straight cut.	13. ...in line with the top and bottom of the humerus bone. Lamb Silverside Joint.
			
14. The remaining joint is part silverside and thick flank with humerus bone attached. Mini Leg of Lamb on the bone	15. A. Lamb Shank B. Mini Leg of Lamb on the bone C. Lamb Silverside joint	D. Mini Roast (Topside) E. Lamb Rump Mini Roasts	
			

**St George's**  
Something Seasonally Special

## New ideas for Lamb

A modern twist on  
a traditional roast quick  
and easy for midweek.



**THE CARVERY**  
visit our website for more  
great lamb ideas [www.simplylamb.co.uk](http://www.simplylamb.co.uk)

**QUALITY ASSURED LAMB**  
England 100%



**St George's**  
Something Seasonally Special

## Try something tasty...Lamb

Slice up a Rosemary and mint infused  
boneless leg joint, tasty and modern.  
And save some leftovers for in the week!

**THE CARVERY**  
visit our website for more modern lamb  
ideas [www.simplylamb.co.uk](http://www.simplylamb.co.uk)

**QUALITY ASSURED LAMB**  
England 100%

New ideas for Lamb



**St George's**  
Something Seasonally Special

**QUALITY ASSURED LAMB**  
England 100%

New ideas for  
**Lamb**

A modern twist on a traditional  
roast quick and easy for midweek.

**St George's**  
Something Seasonally Special



**QUALITY ASSURED LAMB**  
England 100%



## Making lamb deliver through the supply chain to the consumer.

Second year development of the lamb plan - new cuts, enhancing the consumer image of lamb and promoting lamb mince by integrating lamb cuts into the key major initiatives steak bar, chop house, carvery and gourmet burgers.  
Maximising carcass utilisation and the value of lamb.



# Lamb plan

adding value by cutting the carcass differently

## Make more of **lamb mince**

There are many opportunities for lamb mince relating to a whole range of meal options from main meals to snacks. Let's make the most of lamb mince. (See pages 8 to 15)

## Maximise the **forequarter**

Value meal options and new product opportunities from products derived from the forequarter provide exciting new market opportunities. Let's benefit from them. (See pages 16 to 23)

## Benefit from **better butchery** and **presentation**

Lamb is currently relatively expensive in the market and research indicates it will remain so but it does not live up to consumer expectations. When prime cuts are butchered to a higher standard and presented well they do deliver and provide better value with little plate waste. Let's benefit from this. (See pages 24 to 29)

Last but not least, it is important to highlight to consumers the meal opportunities in relation to lamb offal, the fifth quarter is a discovery still waiting to happen. (See pages 30 to 31)



# Lamb NPD work

New and exciting NPD work that creates:

- New ideas
- New cuts
- New opportunities
- New products for the consumer



Pulled shoulder of lamb

cuts from the **forequarter**...



## Neck Fillet

A fully trimmed neck fillet with the yellow gristle removed and end squared.



## Daubes (shoulder)

These daubes are cut from a deboned and highly trimmed shoulder and secured with two roasting bands to keep the daubes in shape during cooking.



## Victoria Roast

A deboned and highly trimmed shoulder rolled into two equal-sized joints.



## Victoria Roast Mini Roast

A deboned and highly trimmed shoulder rolled into four equal-sized mini joints.



## Shoulder Noisette Joint

After highly trimming, only the best parts of the shoulder are used for this product.



## Shoulder Roast

A traditional bone-in shoulder cut.



## Knuckle

This is the meaty knuckle version, which contains extra shoulder meat and is French trimmed.



## Six Rib Rack

This rack is cut from the rib section of the forequarter.



# Master Chef and Master Butcher

Quality Standard Lamb



MASTER Chef AND MASTER Butcher

**LAMB RANGE**

Michelin starred Chef, Andreas Antonis and Master Butcher Dirk Van Lanen have pooled their vast knowledge to create an innovative range of lamb for everyone and all ages which are ideal for both traditional and more style cooking.

This new range not only increases cuisine selection, it also provides real differentiation on menus for consumers to try.

**BLAND BONELESS LAMB BREAST**

It is the perfect lamb for the discerning diner (suitable for 200g).




*It is the perfect lamb for the discerning diner (suitable for 200g).*

**CHICKEN (SHOULDER)**

It is the perfect lamb for the discerning diner (suitable for 200g).




*It is the perfect lamb for the discerning diner (suitable for 200g).*

**LAMB STAKE RIB**

It is the perfect lamb for the discerning diner (suitable for 200g).




*It is the perfect lamb for the discerning diner (suitable for 200g).*

**CHUNKY NECK CHOPS**

It is the perfect lamb for the discerning diner (suitable for 200g).




*It is the perfect lamb for the discerning diner (suitable for 200g).*

**BELLY OF LAMB**

Cook with herbs, garlic and lemon and cook for 4 hours at 100°C. It is the perfect lamb for the discerning diner (suitable for 200g).

**Belly of Lamb**




*It is the perfect lamb for the discerning diner (suitable for 200g).*

**Lamb Tongue**




*It is the perfect lamb for the discerning diner (suitable for 200g).*



# Veal

- Working closely with key companies to promote British Veal and Rose Veal.
- Launch of Master Chef master Butcher activity for veal
- Comprehensive support package for retailers

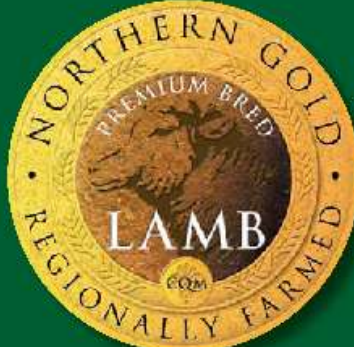


# Regional Branding/Retailer Processor Support





# Regional Branding





Clifton Quality Meats are proud to offer you a new top quality English Lamb brand – Northern Gold

We are proud to support local farmers and our lamb is the very best of locally farmed produce.

Northern Gold lamb is processed in local abattoirs and finished to the highest standards. It is then chilled and matured in special chilling rooms which enhances both flavour and eating quality.

**Ask our sales team about Northern Gold lamb**



**Clifton Quality Meats**  
Tel: 01253 697070

UK 4820 E.C.

**QUALITY**  
lamb









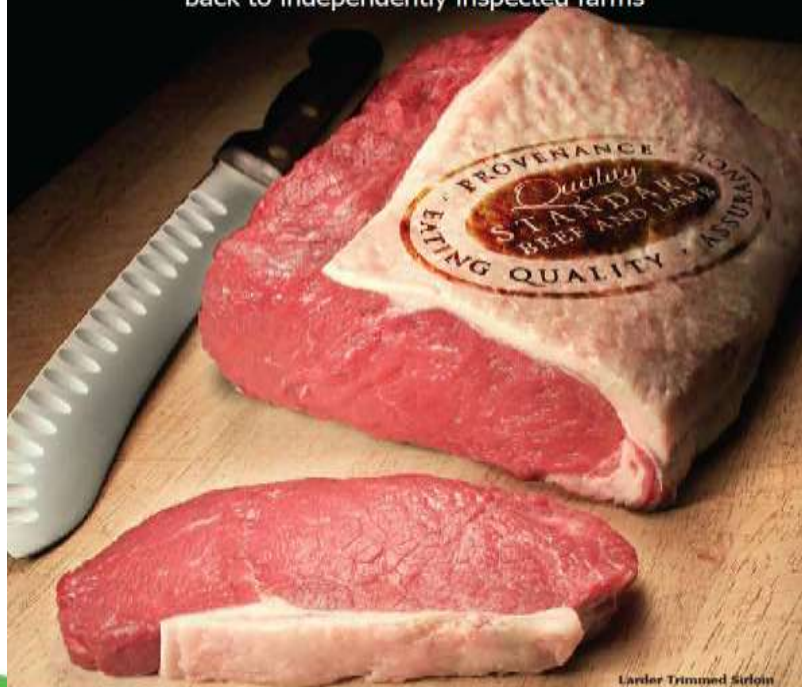
# Butcher's Activity





# Buy with Confidence

All Quality Standard beef and lamb is fully traceable back to independently inspected farms



Larder Trimmed Sirloin

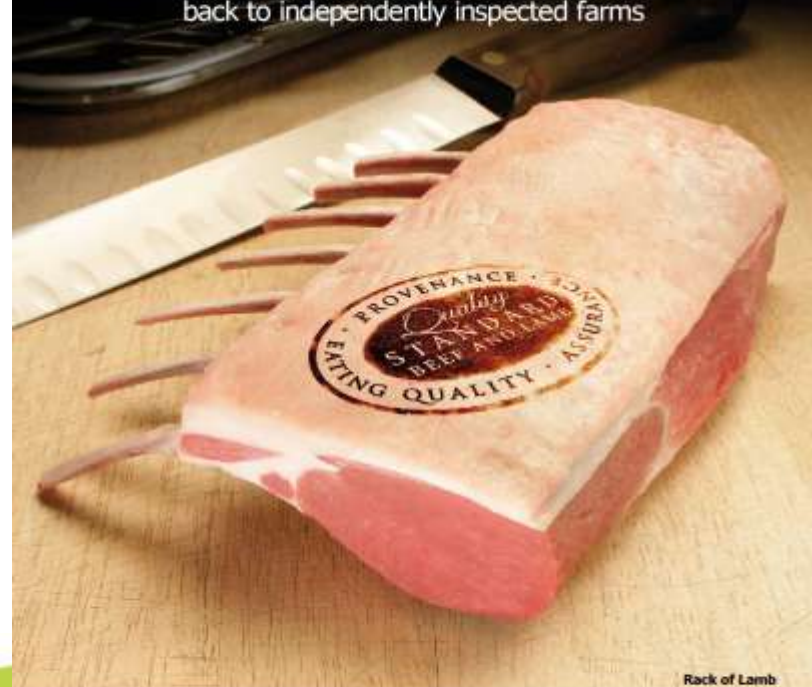
Farm Assured, Quality Assured, Be Assured.

[www.simplybeefandlamb.co.uk](http://www.simplybeefandlamb.co.uk)



# Buy with Confidence

All Quality Standard beef and lamb is fully traceable back to independently inspected farms

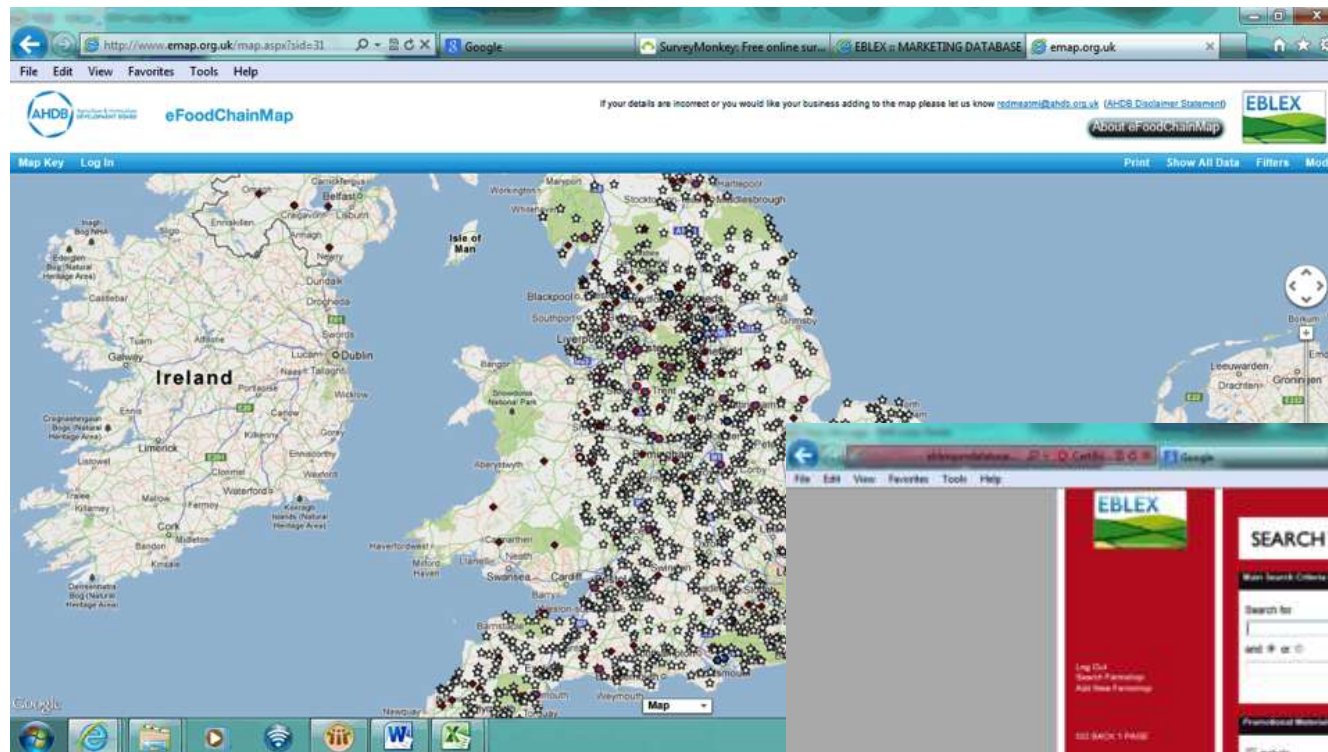


Rack of Lamb

Farm Assured, Quality Assured, Be Assured.

[www.simplybeefandlamb.co.uk](http://www.simplybeefandlamb.co.uk)









# Multiple Retail

- Category insight initiatives
- Support for NPD/buying teams
- On-pack SP activity linked to TV ads
- Merchandising initiatives

# Multiple accounts



MORRISONS

YOUR M&S

Waitrose

Sainsbury's

BOOKER  
WHOLESALE



TESCO

makro



COSTCO

ASDA

The co-operative





## Premium C

**TESCO**

**Sainsbury's**

**Waitrose**

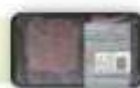
**M&S**

**M**  
**MORRISONS**

**The co-operative**

**ASDA**

Leg Steaks Premium



Leg Steaks Standard



Leg Steaks Organic



Leg Steaks  
Added Value



Leg Steaks Bone-in



Leg Joint Half  
Boneless Premium



Leg Joint Half  
Boneless



Leg Joint Half  
Bone In



Leg Joint Half  
Organic



Leg Joint Whole /  
Carvery / Premium



Leg Joint Whole  
Bone-in



Leg Butterflied



Leg Diced



Leg Mini Roast



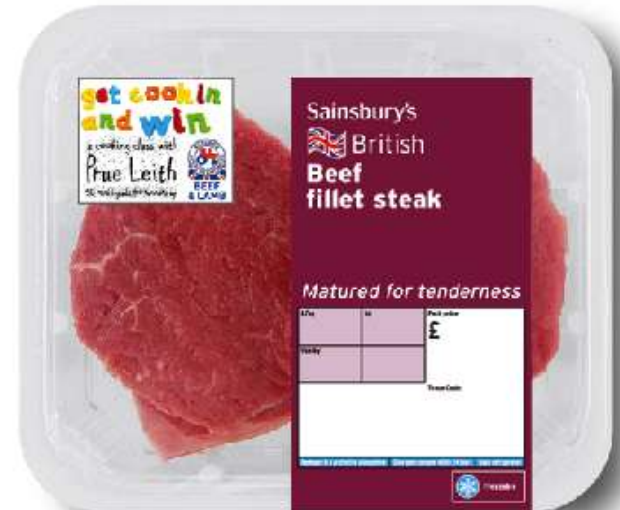




Relating TV ad end shot - play letters on fridge



RT on-pack promotional label







Interactive in-store labels  
via QR code  
or AR technology (Aurasma)

# Thankyou

