
Livestock & Meat Commission

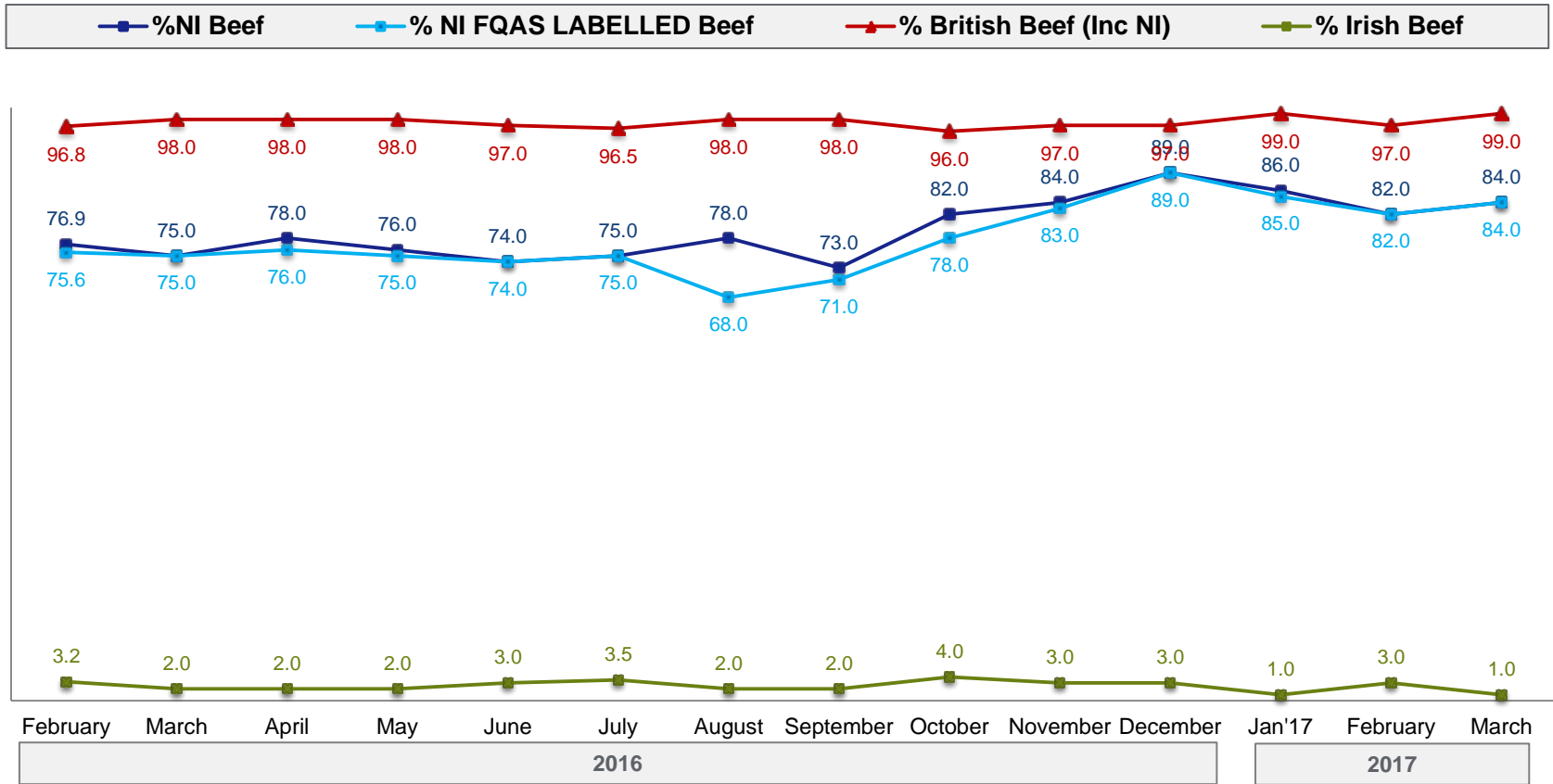
Origin of Produce Mystery Shops

March 2017

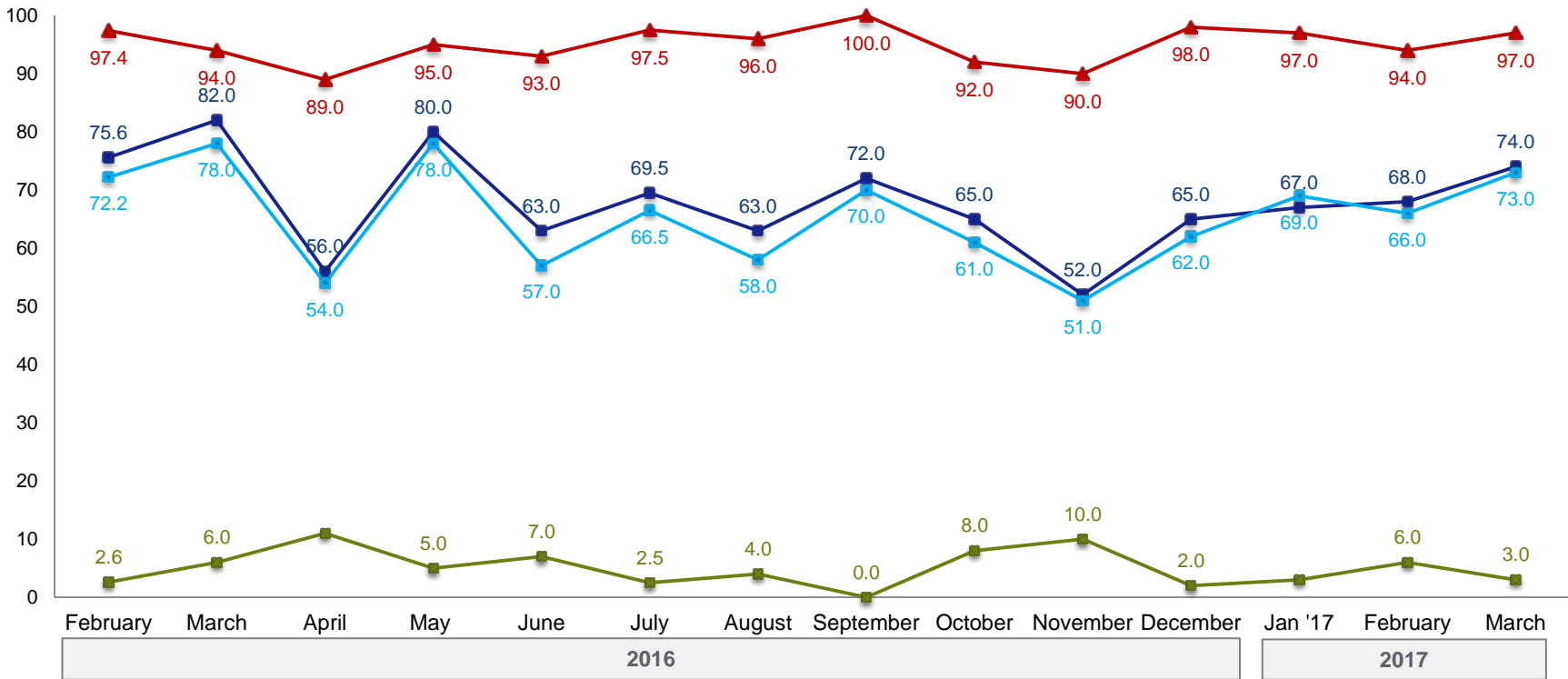
Methodology and Sample

- The aims and objectives of this study are to understand the origins of beef and lamb that is stocked across a variety of stores in Northern Ireland.
- On a monthly basis a Millward Brown Ulster mystery shopper visits 10 separate stores and records from the product labels where the meat has come from. Per month, each of the 10 stores is visited twice allowing for a weekday and weekend mystery shop. Each month, a fresh sample of stores and geographical locations are selected. (*From August 2013 – September 2014 only 5 stores per month were visited.*)
- For each beef and lamb product the following classifications are recorded:
 - Was the product NI beef or lamb? / Did the product carry the NIFQA logo? / Was the product British beef or lamb (inc NI)? / Was it Irish beef or lamb? / Was it from another EU country? / Was it non EU?
- The stores within the sample that are visited include Tesco, ASDA, Lidl, SuperValu, Marks & Spencer and Eurospar.
- Fieldwork was conducted monthly from August 2013 to March 2017.
- All fieldwork is conducted in accordance with the Market Research Society Code of Conduct, and in compliance with the international quality standard ISO 20252: 2012.

Beef

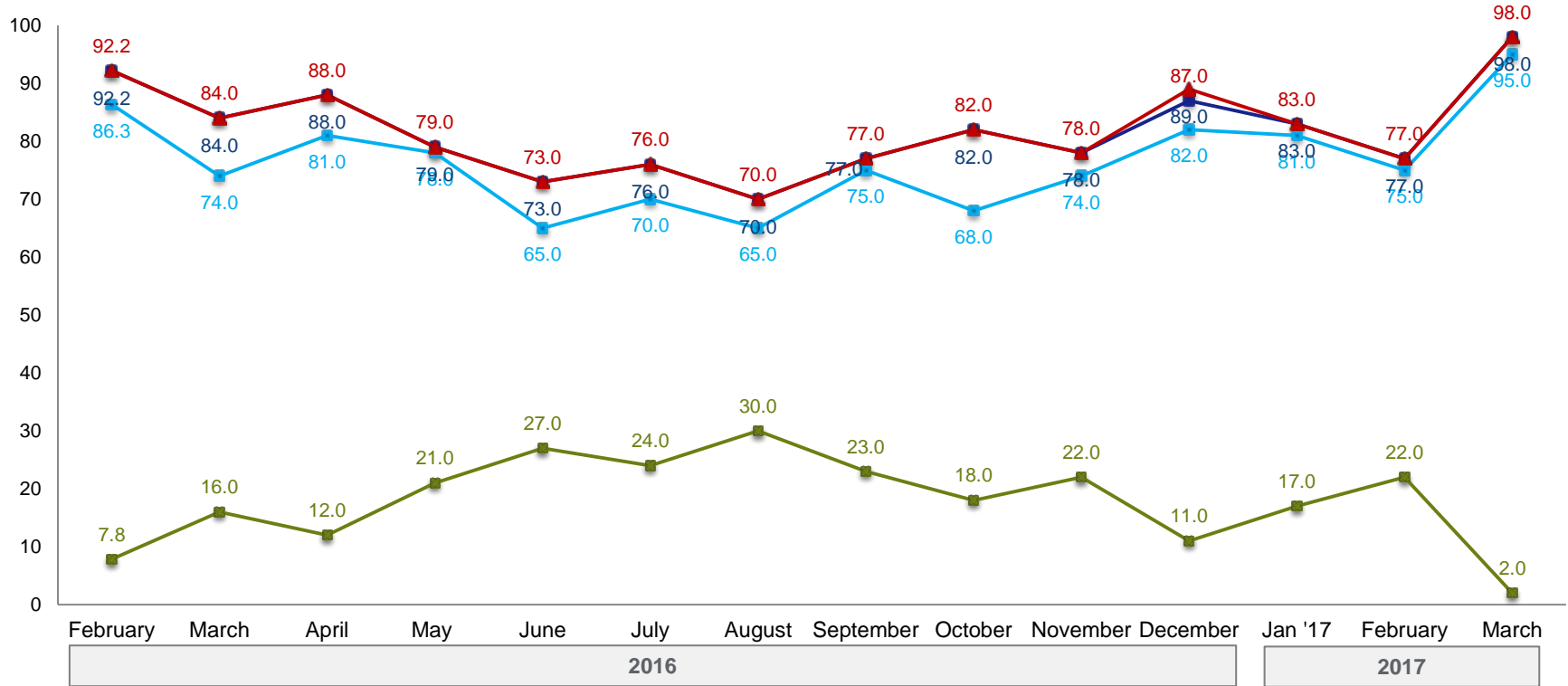


■ %NI Beef
 ■ % NI FQAS LABELLED Beef
 ▲ % British Beef (Inc NI)
 ■ % Irish Beef

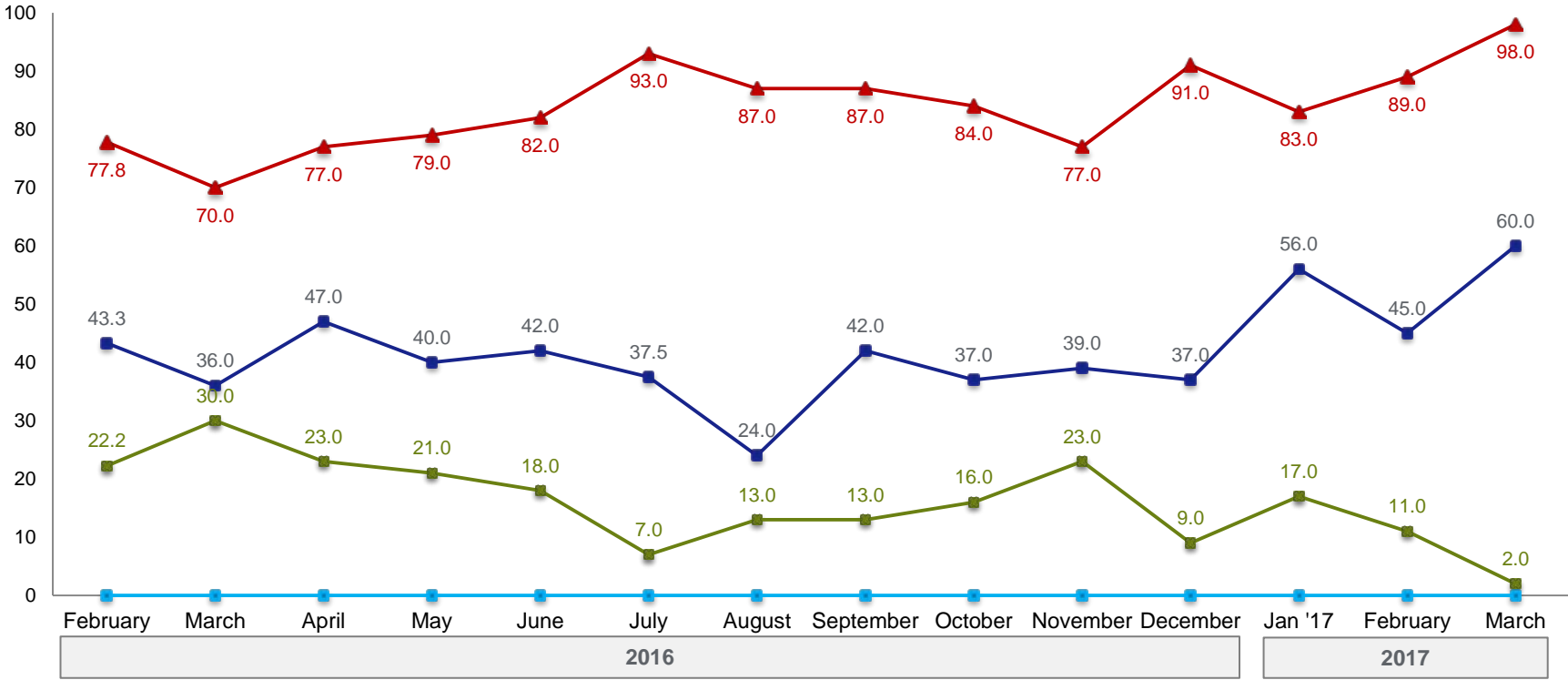


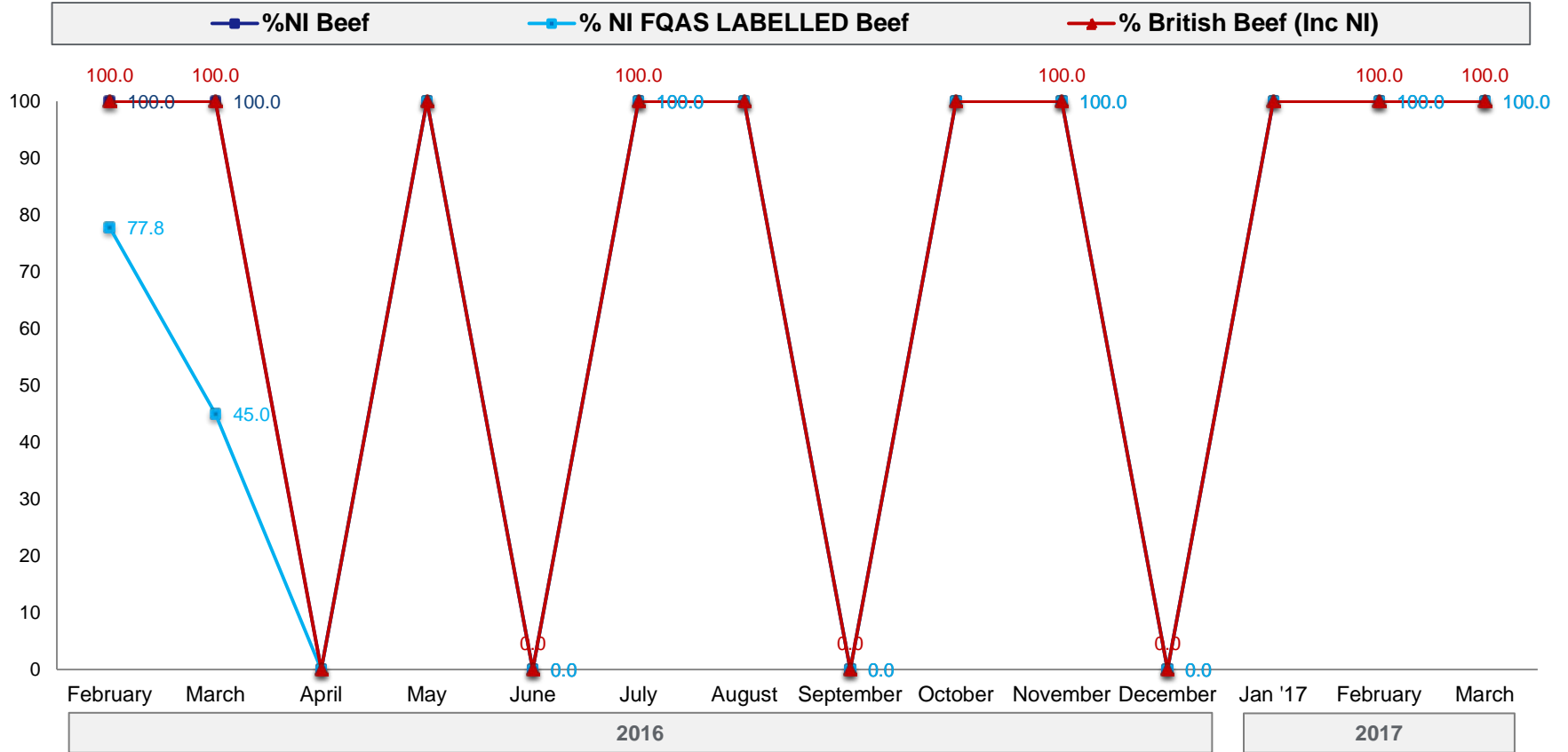


■ %NI Beef ■ % NI FQAS LABELLED Beef ■ % British Beef (Inc NI) ■ % Irish Beef



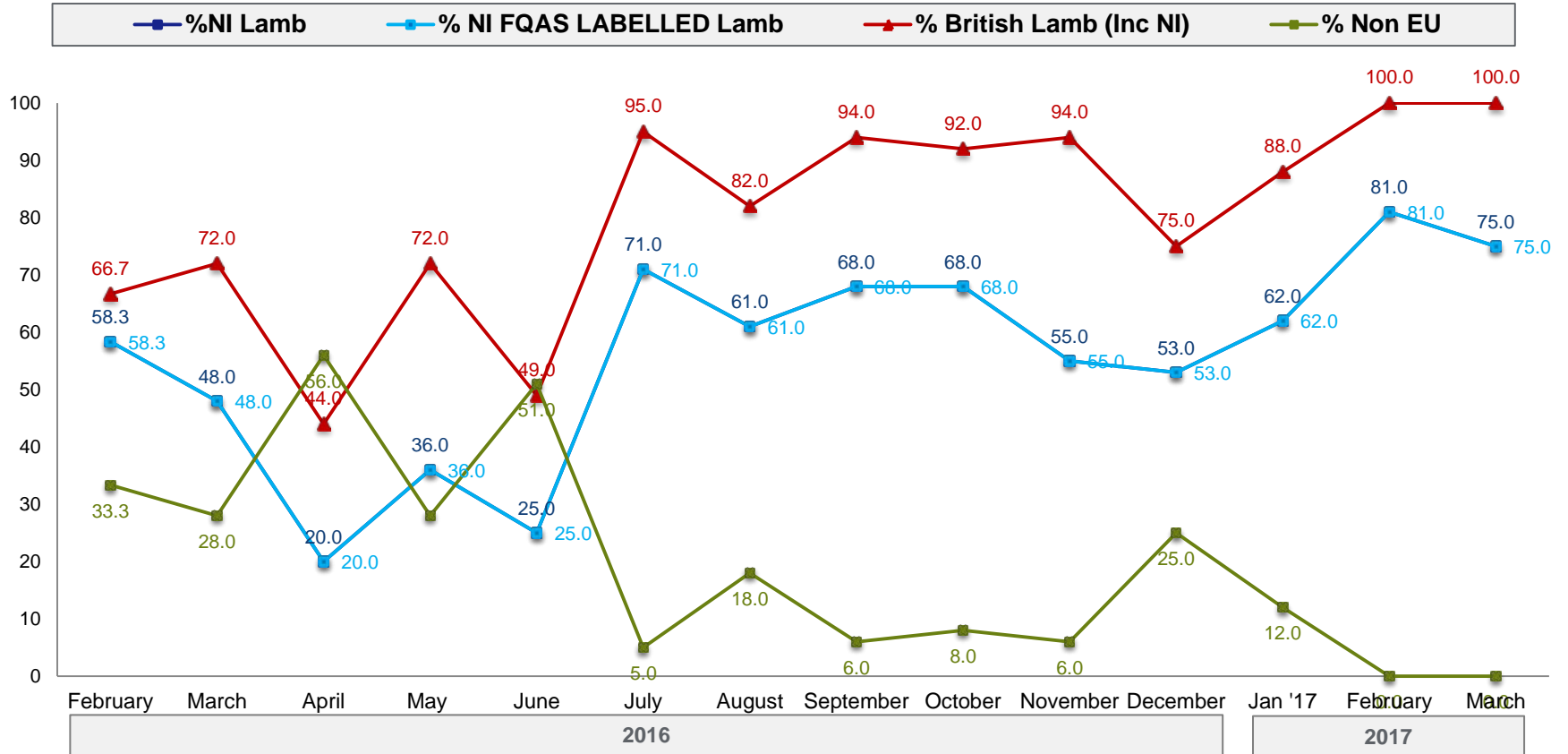
■ %NI Beef
 ■ % NI FQAS LABELLED Beef
 ▲ % British Beef (Inc NI)
 ■ % Irish Beef



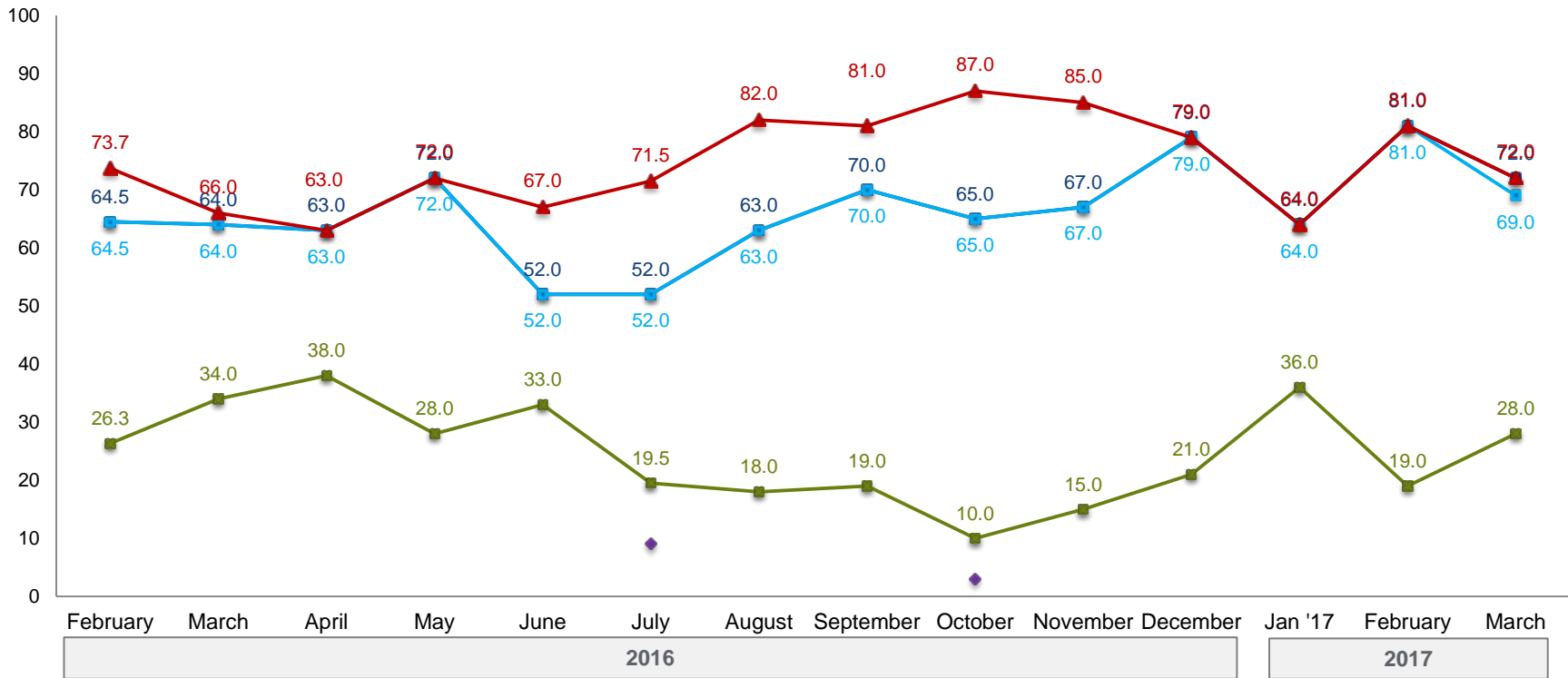


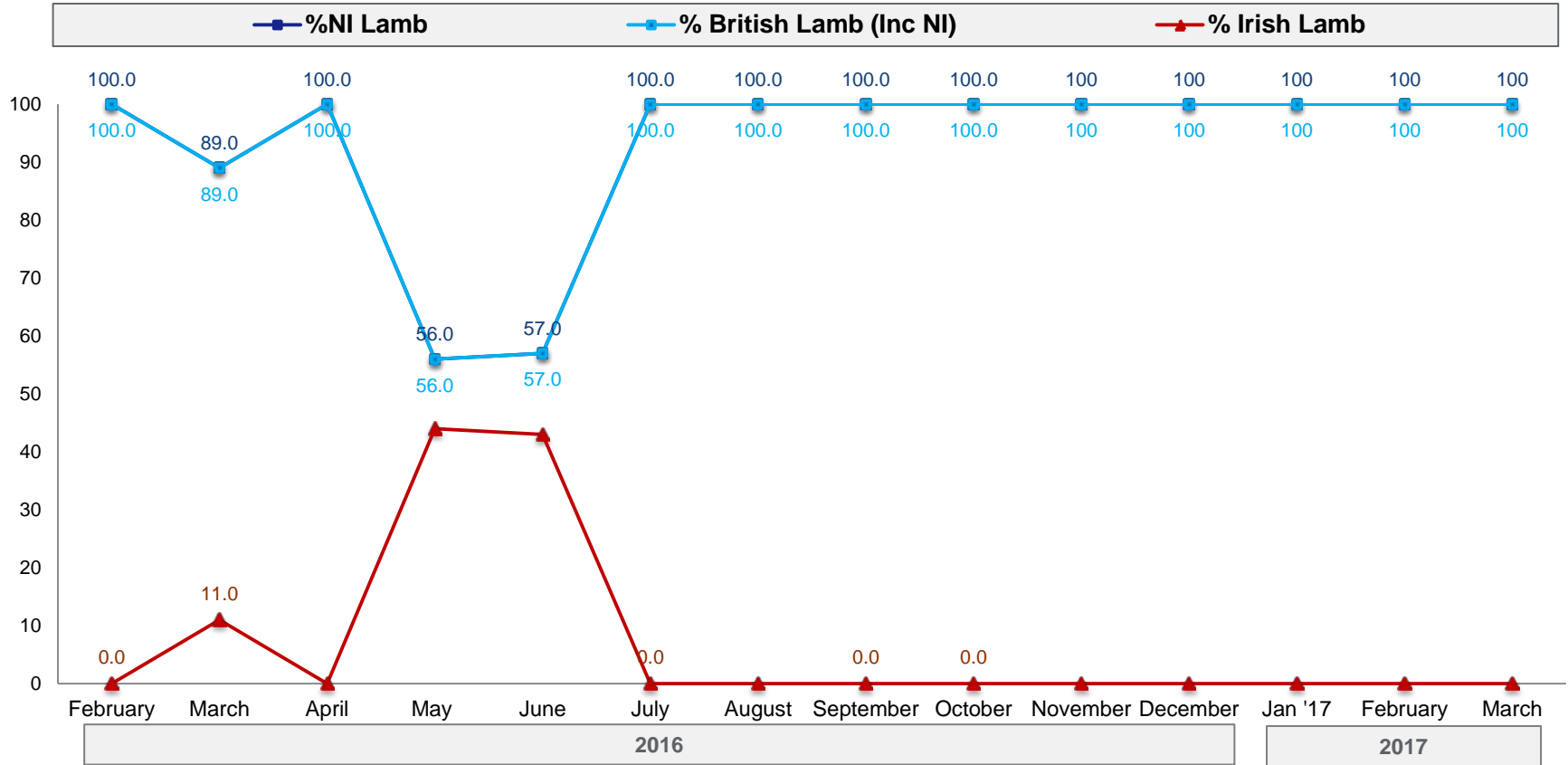
- The findings from the 2015-2016 SuperValu mystery shops show that, where stocked, 100% of the beef was British.
- NIFQA labelling was present on 100% of the beef products in the stores visited in: February, March, May, July, August and October 2015; February, March, May, September, October and November 2016; and, January and February 2017.
- In the mystery shops for January, June, September and December 2015, in January, June and July 2016, and in March 2017, NIFQA labelling was present on 86%, 89%, 93%, 95%, 80%, 86%, 83% and 64% respectively.
- NIFQA labelling was not present on any of the beef products in the stores that were visited for mystery shopping in August 2016.
- There were no relevant beef products at the stores visited in December 2016.

Lamb

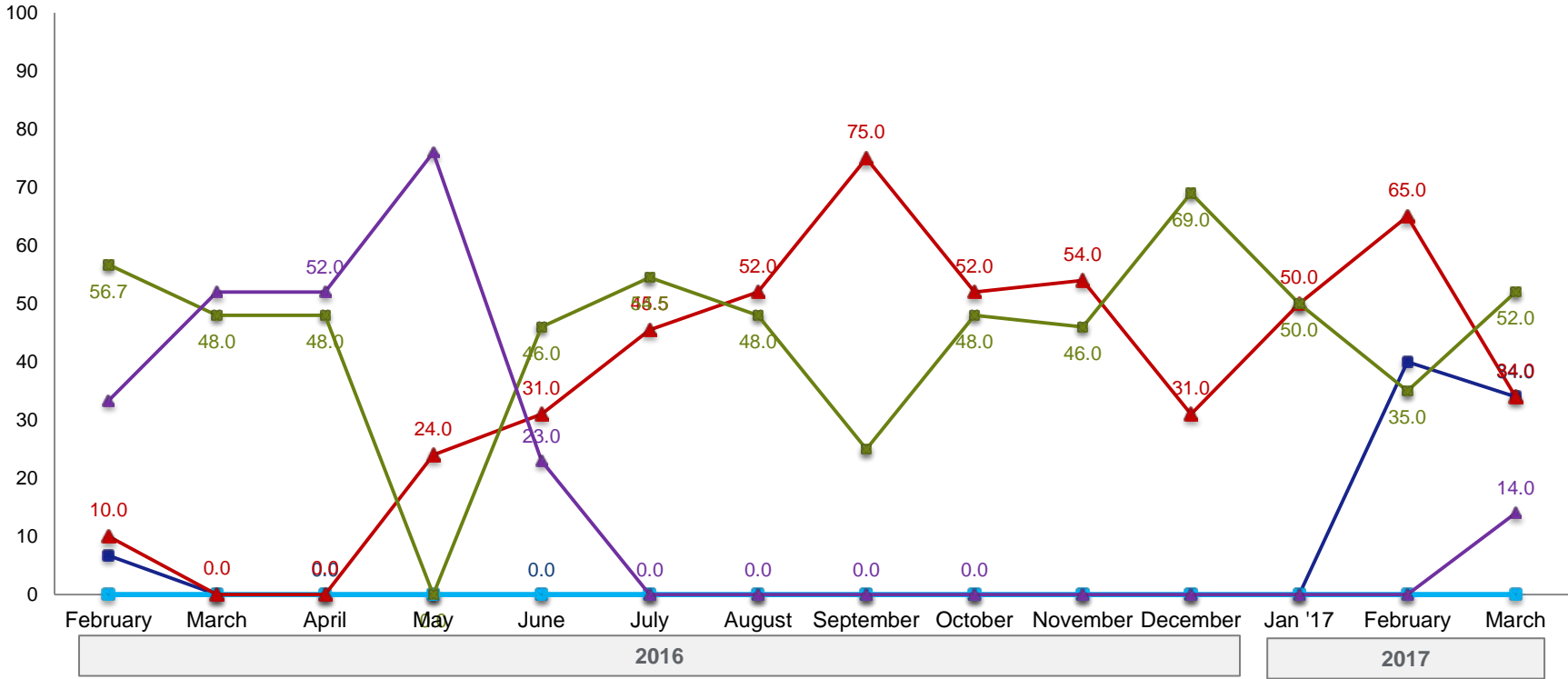


■ %NI Lamb
 ■ % NI FQAS LABELLED Lamb
 ▲ % British Lamb (Inc NI)
 ■ % Non EU
 ◆ EU Irish





■ %NI Lamb
 ■ % NI FQAS LABELLED Lamb
 ▲ % British Lamb (Inc NI)
 ■ % Irish Lamb
 ▲ % Non-EU



- In February, March, May, June and December 2015, as well as in March, May September, October and November 2016, all lamb that was stocked in the Supervalu stores visited had NIFQA labelling. This was also the case in January 2017.
- For the rest of the months in 2015; January, February, April, June, July, August and December 2016; and, February and March 2017, no relevant lamb products were stocked in the stores that were selected for mystery shopping.