
Livestock & Meat Commission

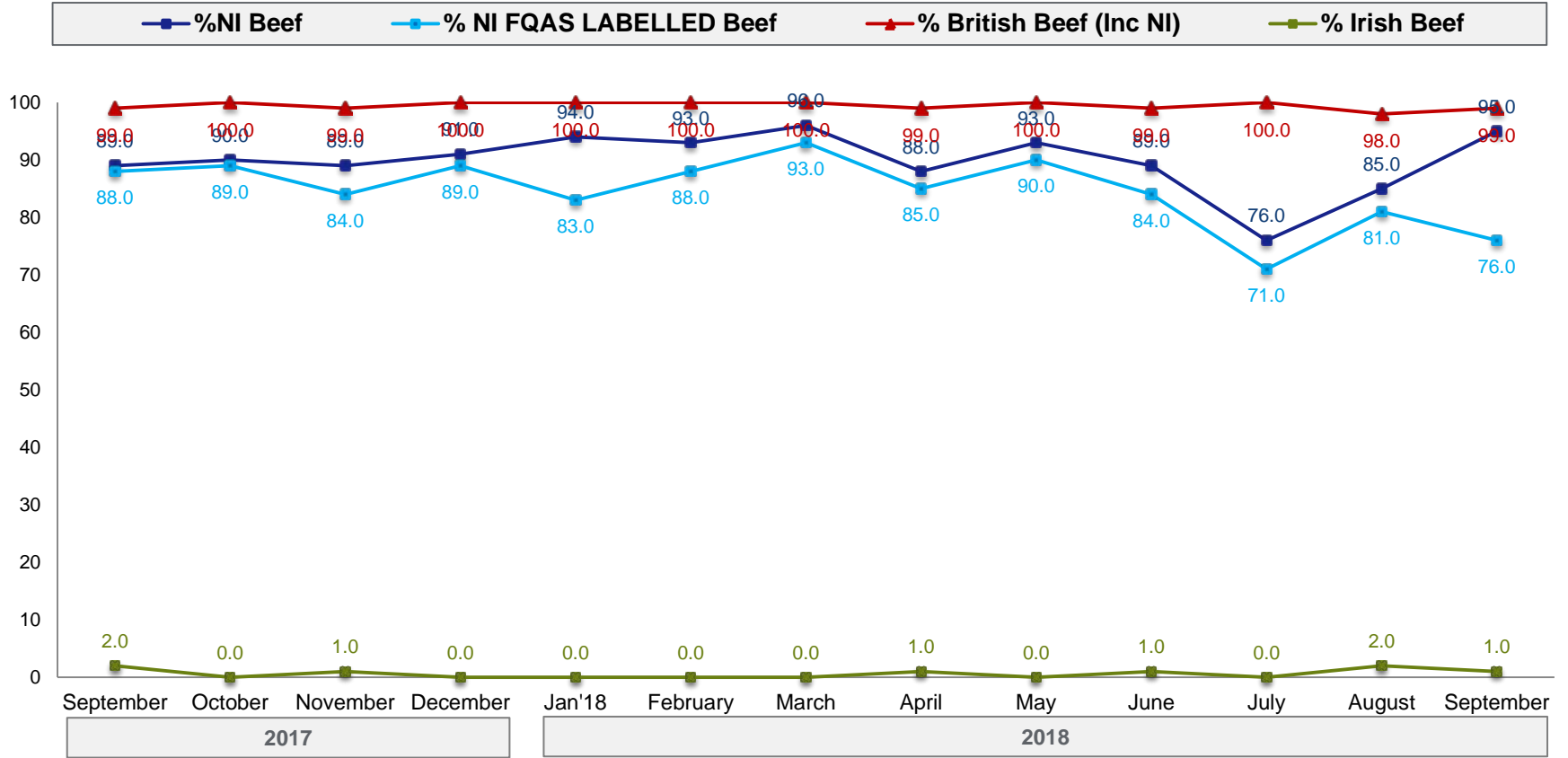
Origin of Produce Mystery Shops

September 2018

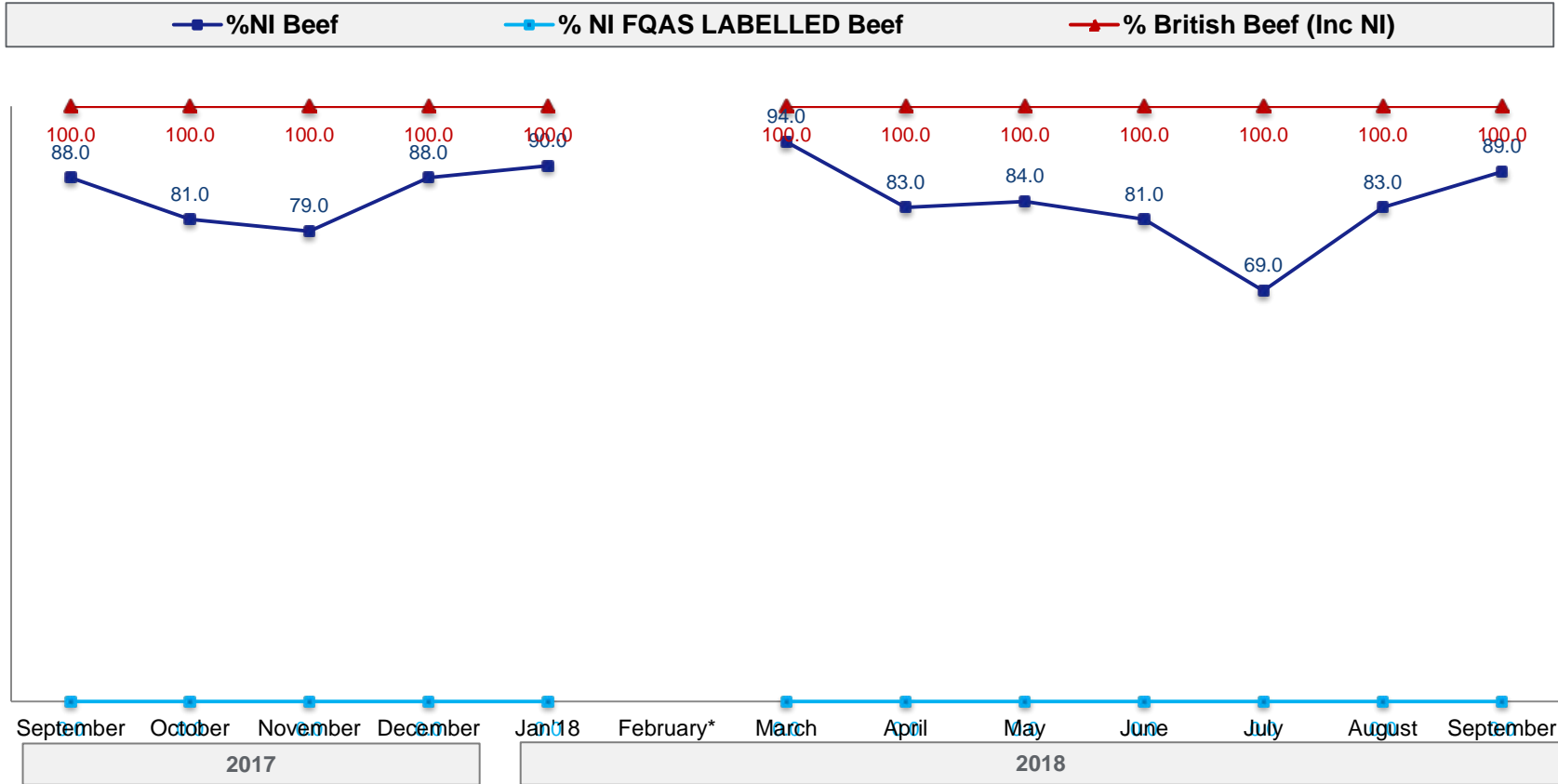
Methodology and Sample

- 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 Kantar 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 (including NI)? / Was it Irish beef or lamb? / Was it from another EU country? / Was it non EU?
- The stores visited within the sample were Tesco, ASDA, Lidl, SuperValu, Marks & Spencer and Eurospar.
- Fieldwork was conducted monthly from August 2013 to September 2018.
- 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.

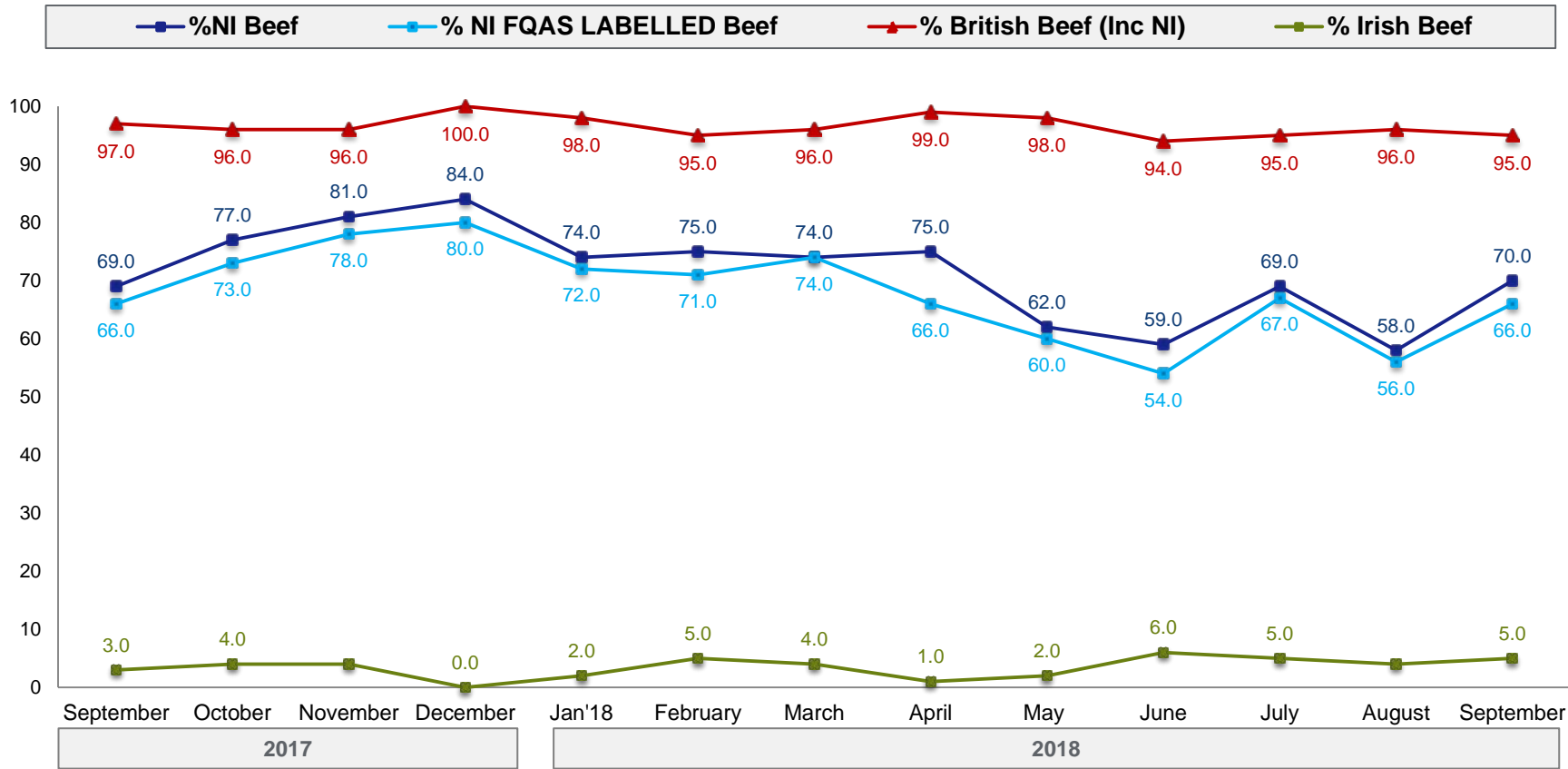
Beef



Sainsbury's

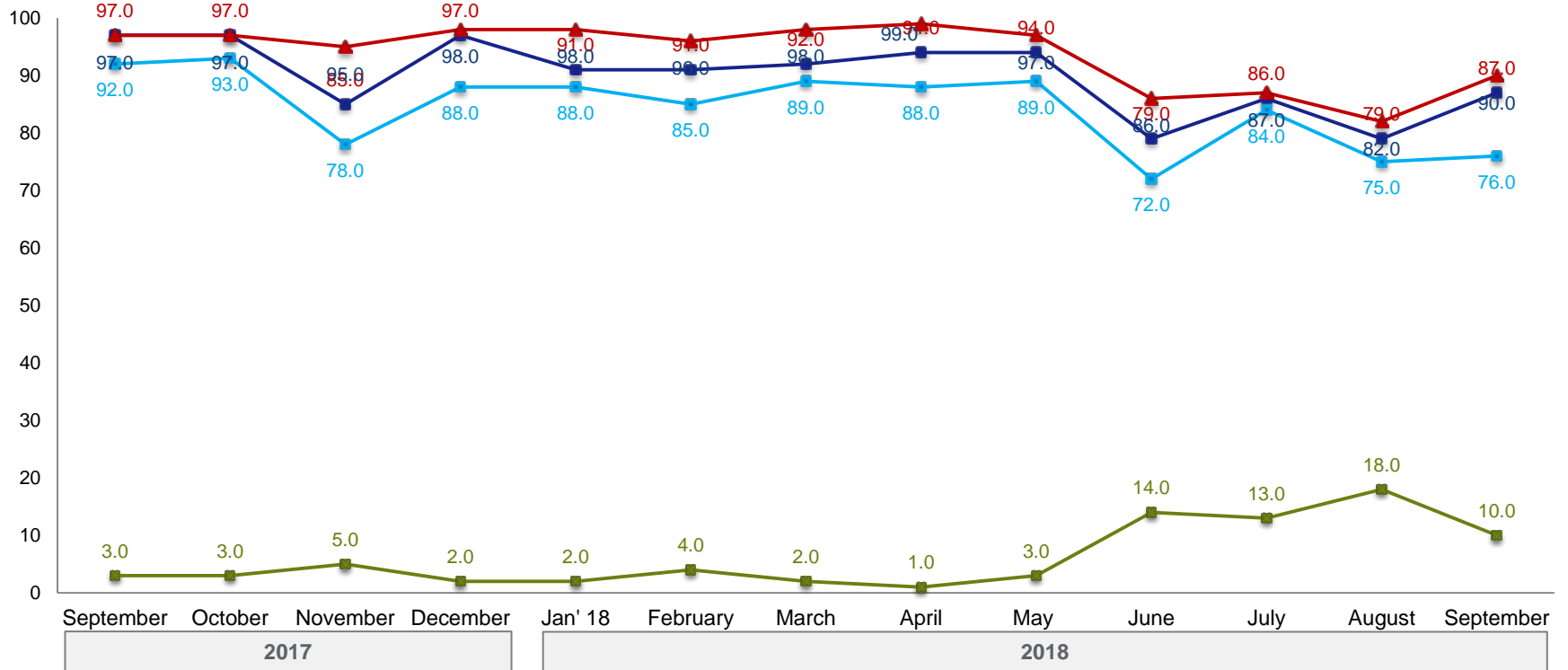


*Store not visited

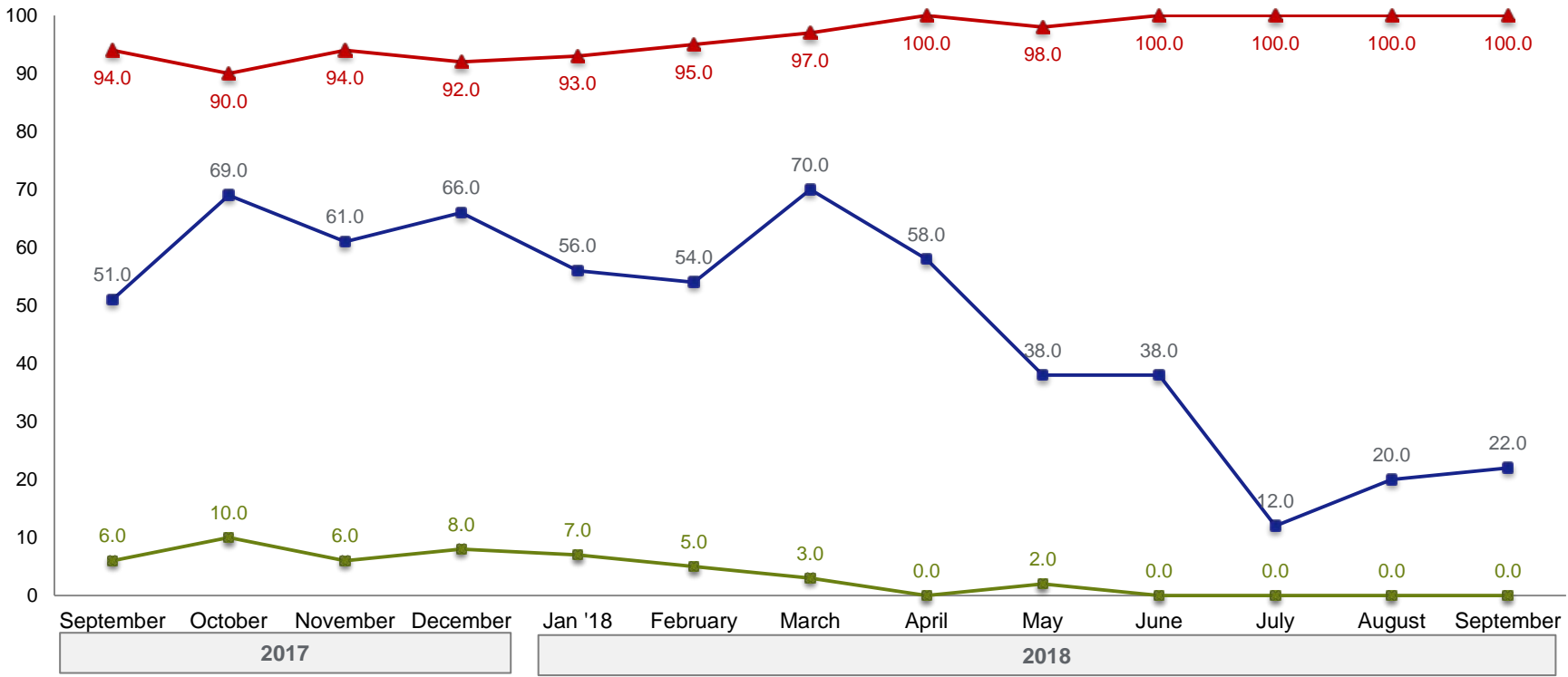


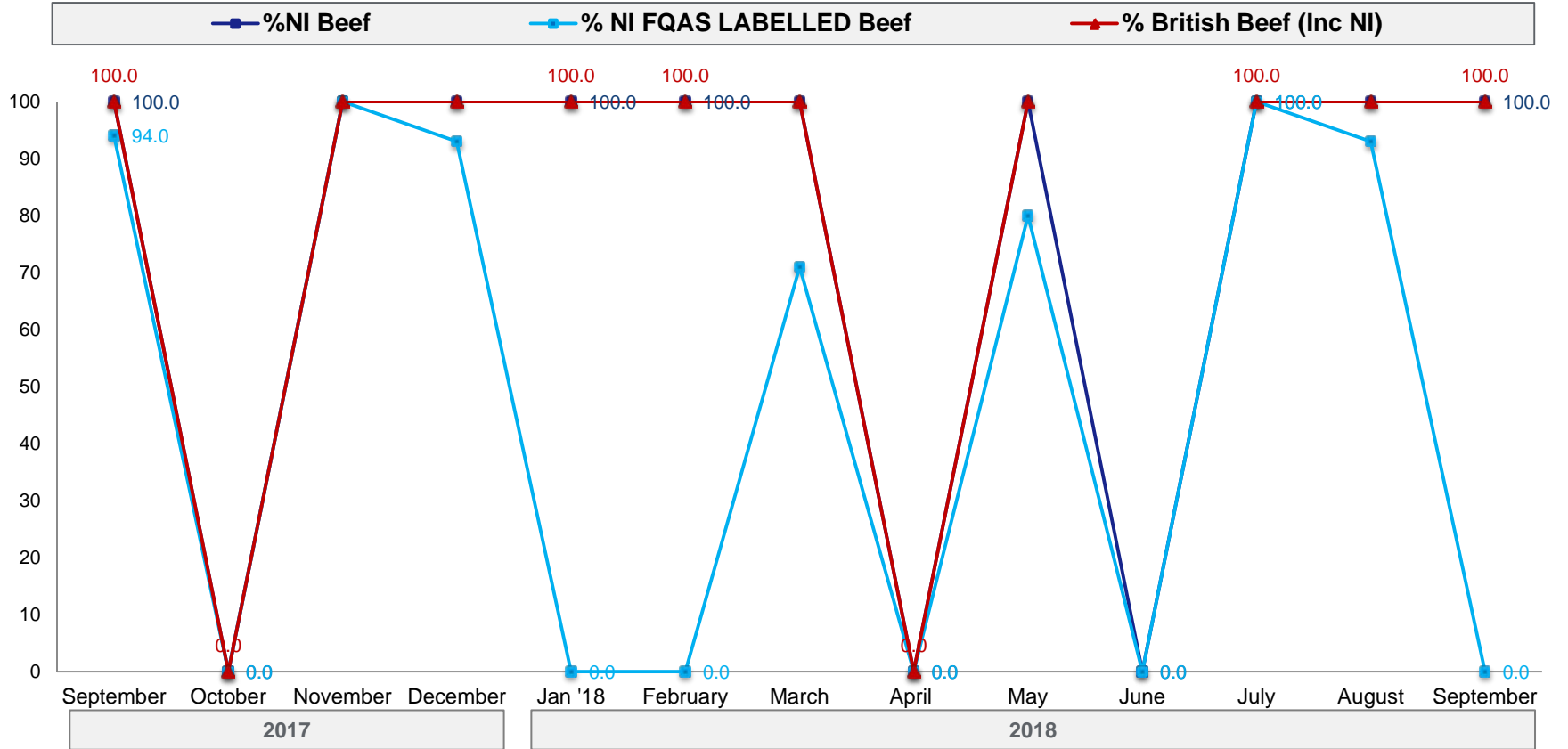


■ %NI Beef ■ % NI FQAS LABELLED Beef ▲ % British Beef (Inc NI) ■ % Irish Beef



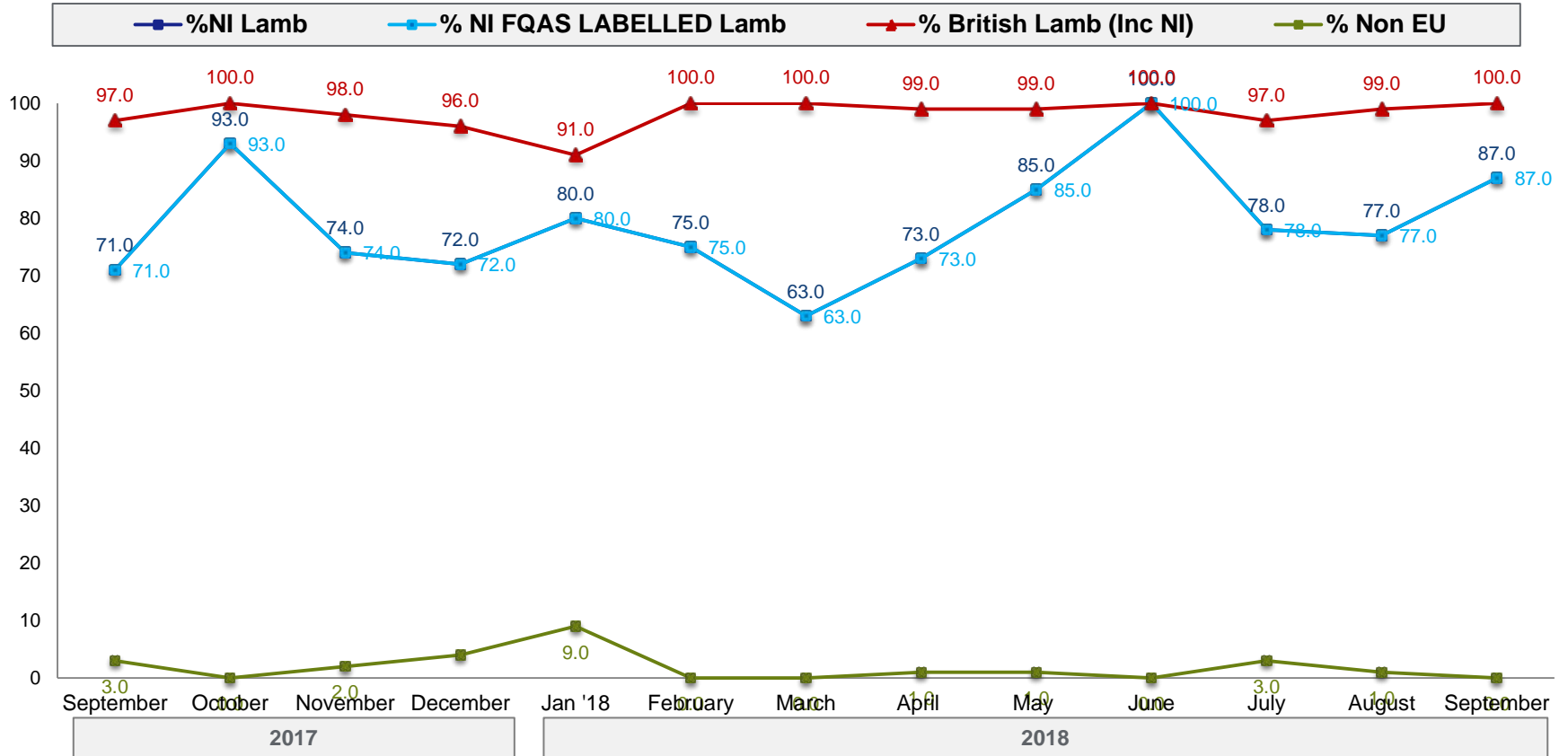
%NI Beef **% British Beef (Inc NI)** **% Irish Beef**



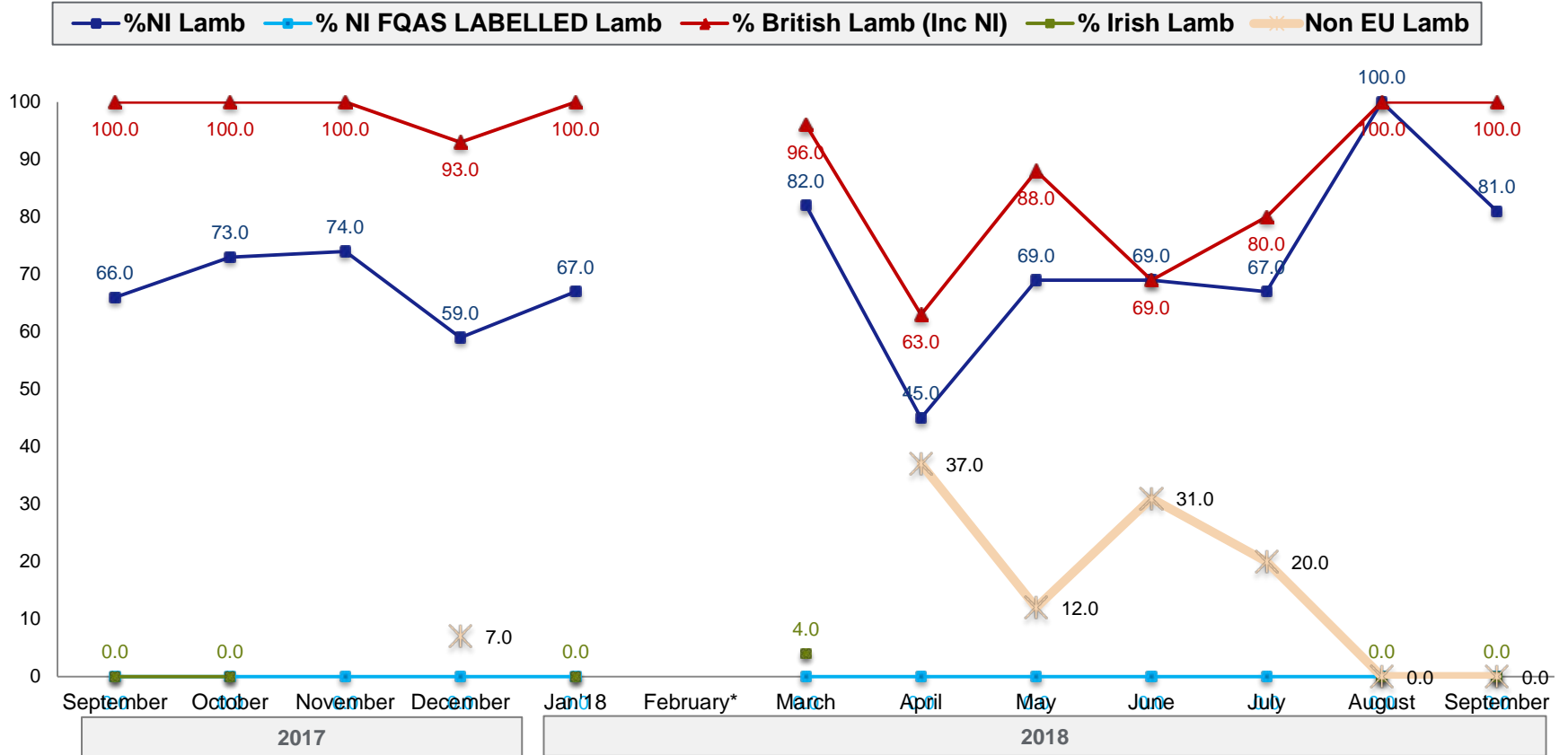


- The findings from the 2015-2018 SuperValu mystery shops show that, where stocked, 100% of the beef was British.
- NIFQA labelling was present on 100% of the beef products in the stores visited in: February, March, May, July, August and October 2015; February, March, May, September, October and November 2016; January, February and July 2017; February and March 2018.
- In the mystery shops for January, June, September and December 2015; in January, June and July 2016; in March, April, June, September, October, November and December 2017; and in May, July and August 2018, NIFQA labelling was present on 86%, 89%, 93%, 95%, 80%, 86%, 83%, 64%, 92%, 67%, 88%, 29%, 63%, 89%, 83%, 85% and 44% respectively.
- NIFQA labelling was not present on any of the beef products in the stores that were visited for mystery shopping in January and September 2018.
- In May and August 2017 and April and June 2018, no relevant beef products were stocked in the stores that were selected for mystery shopping.

Lamb

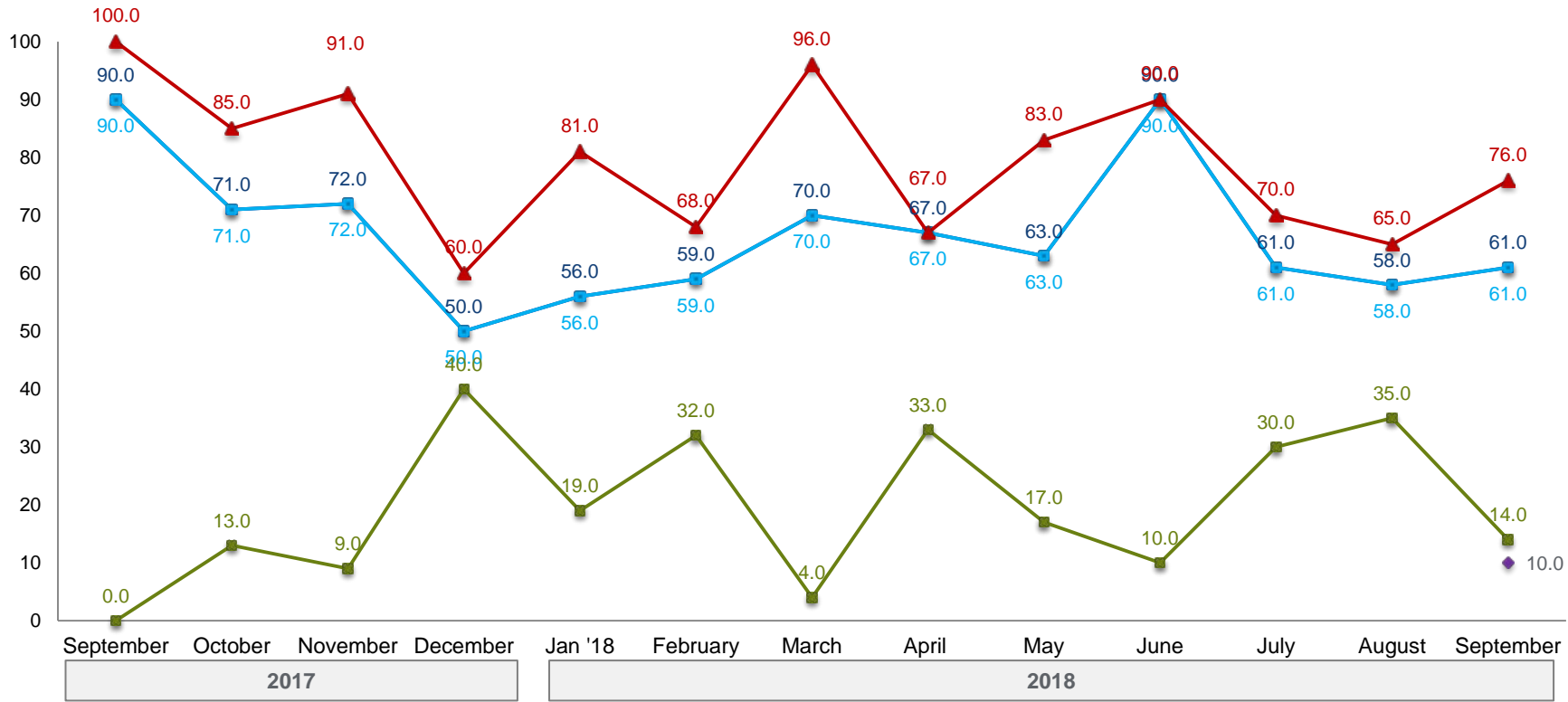


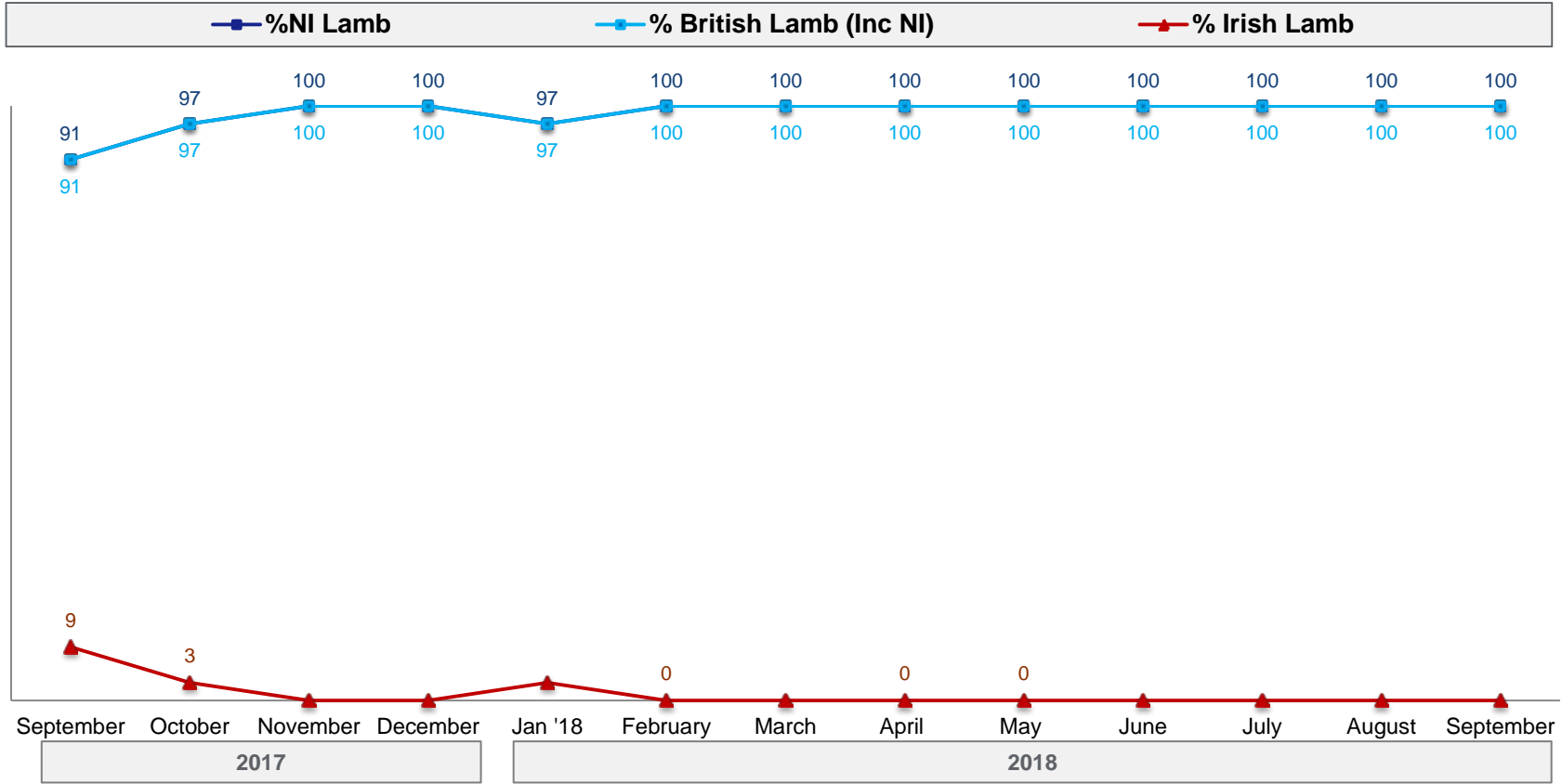
Sainsbury's

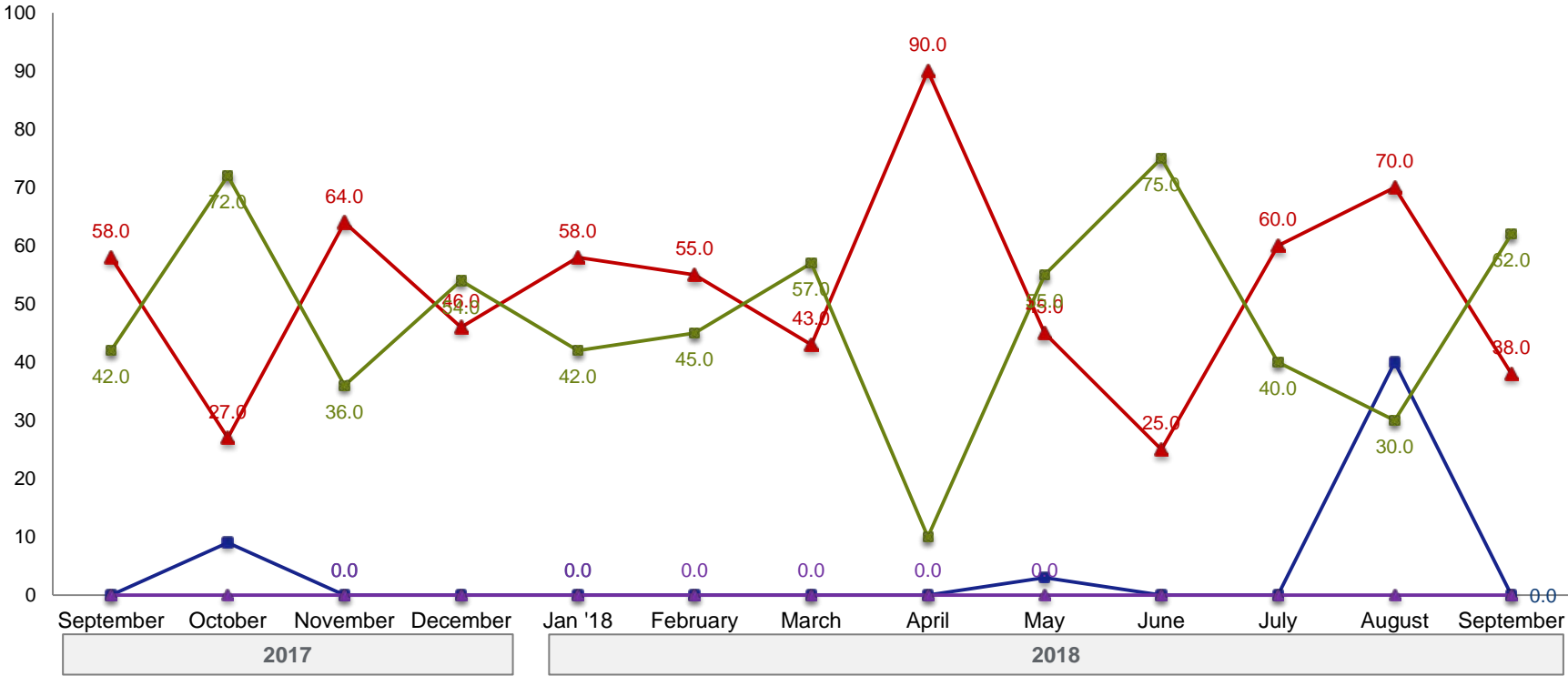


*Store not visited

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







- 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, April, June, July, September, December 2017, February and March 2018.
- For the rest of the months in 2015; January, February, April, June, July, August and December 2016; February, March, May, August and November 2017; January, April, May, June, July, August and September 2018, no relevant lamb products were stocked in the stores that were selected for mystery shopping.
- In October 2017, all of the relevant lamb products stocked in the stores visited were from Northern Ireland; none of these products had NIFQA labelling.