

CARCASS UTILISATION

THE KEY TO UNLOCK PORK PROFITABILITY?



- **Structure**

- Joint venture between Kent Business School and dunnhumby, launched in April 2005

- **Mission**

- Expand the use of consumer insight amongst farmers and small food processors, to improve their prospects in an increasingly competitive environment, through targeted market and product development informed by research undertaken by PhD students, funded by organisations representative of different commodity sectors and regions

- **Primary areas of research**

- Market segmentation
 - Demand management

Using this information we can analyse Pork Purchasing Trends...

Carcass Utilisation – The Facts!

Dunnhumby UK Retail Purchasing Trends Jan 06 – Dec 07

Loin 18.5% of Carcass

36.3% of Supermarket Customers bought Fresh Loin Chops or Steaks

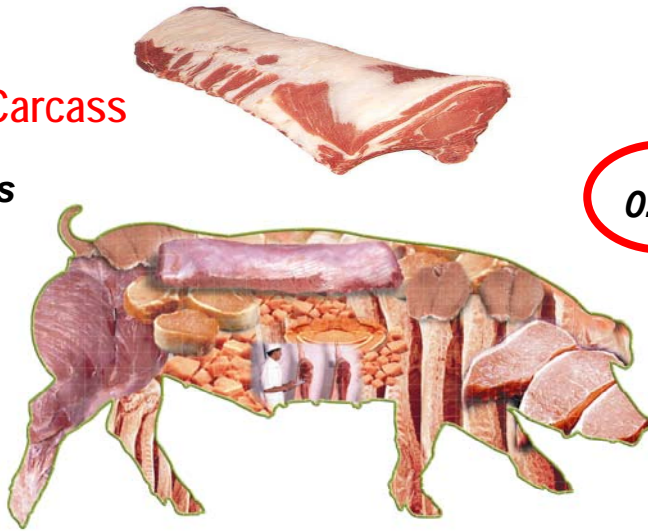
Leg 31.5% of Carcass

X% of Supermarket Customers bought Fresh Pork Leg

33.5% of Carcass

Shoulder

0.52% of Supermarket Customers bought Fresh Pork Shoulder



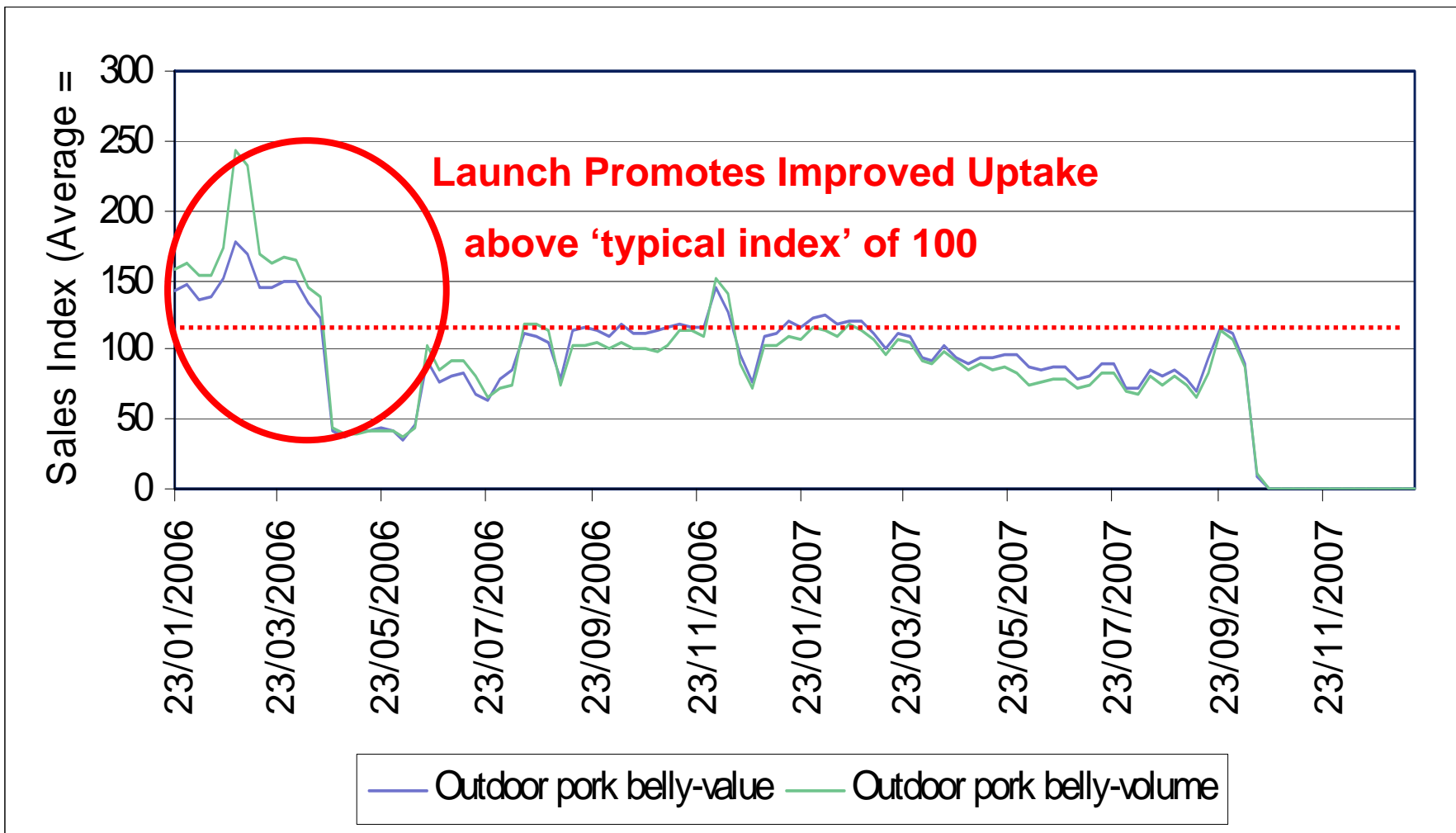
Belly 16.5% of Carcass

1.45% of Supermarket Customers bought Fresh Belly Pork

Pork Belly



Outdoor Pork Belly



Pork Belly – The Facts



Subgroup	Stores Selling	Number of Products	Customer Penetration	Frequency of Purchase	Category Share	Ave. Price per Unit	YOY Volume Growth	YOY Value Growth
Counter pork belly	317	7	0.68%	2.05	45.85%	£2.40	-9.3%	-2.2%
Outdoor pork belly	635	1	0.82%	1.67	53.72%	£2.82	-39.2%	-32.6%
Finest pork belly	5	1	0.01%	1.52	0.43%	£3.57	n/a	n/a
Total	644	9	1.45%	1.91	100.00%	£2.61	-27.0%	-21.0%

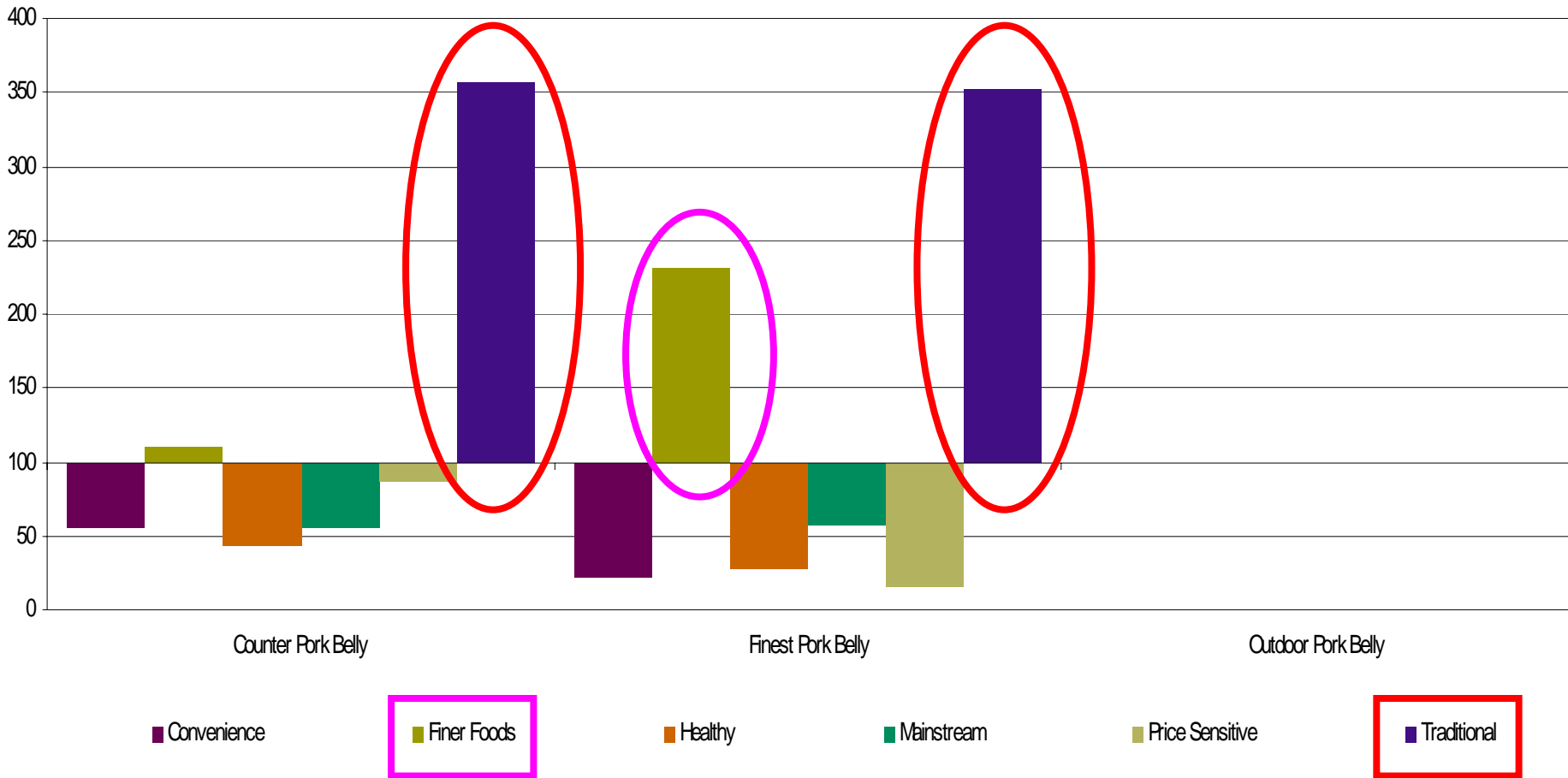
*Data not available due to recent launch of this product.

- The typical consumer for Pork Belly is ‘**Older**’, ‘**Traditional**’ and perhaps seeking ‘**Finer Foods**’ for an occasion?
- The trend is for Belly Pork to ‘**Under Index**’ (<10% variance)
- Of all supermarket customers only **1.45%** have purchased Belly Pork in the last 12 months
- Massive **decline** in the category – **over 20% value Year On Year**

Pork Belly – The Facts



Who buys Pork Belly?



How do we make the *WHOLE CARCASS* appeal to *ALL* customers?

