

Are ready meals ready for the future?

Summary

We Brits love convenience and nothing is more convenient than a ready meal. In fact, we spent £4.7 billion in 2017 on this food category making the UK the biggest ready meal market in Europe.^{1,2} According to Mintel 9 out of 10 of us eat ready meals or ready-to-cook products.³

With ready meals being such a popular product in British shopping trolleys, Eating Better wanted to find out how food retailers are responding to the growing demand for ‘less and better’ meat eating by supplying more vegetarian, flexitarian and plant-based (vegan) ready meals options. We also wanted to find out where meat in ready meals is sourced from and the extent to which this includes ‘better’ meat produced to higher animal welfare or sustainability standards.

Eating Better’s 2017 YouGov survey⁴ demonstrated the huge growth of interest in flexitarian eating – with 44% of British people willing or already committed to cutting down on meat or cutting it out completely. People told us they also wanted supermarkets to offer more meat-free ready meals or meals with less meat to help them reduce their meat consumption.



Despite the huge growth of interest in plant-based eating – including Tesco’s high-profile launch of its Wicked Kitchen meal range – we found that meat still dominates the ready meal aisles. Meat was the main ingredient in three out of four (77%) of the 1,350 different own-brand and branded ready meals we surveyed from 10 retailers (Tesco, Sainsbury’s, Co-op, Marks & Spencer, Waitrose, Morrisons, Asda, Iceland, Aldi and Lidl). Chicken was the most frequently used meat (in 47% of meat-containing dishes), followed by beef (33%), pork (26%), lamb (7%), and duck and turkey (<1%).^a

We were disappointed to find that vegetarian, plant-based and meat substitute dishes comprised only 14% of the 1,350 different ready meals we surveyed. Proportionately we found Waitrose offered the best choice of vegetarian and plant-based dishes (24% of all own-brand and branded ready meal choices); Sainsbury’s, Tesco, M&S and Co-op offered between 15 and 16%, while Asda, Morrisons, Lidl, Iceland and Aldi provided proportionately less choice (12%-7%).

Totally plant-based (vegan) ready meals with no animal products were generally in very short supply (3%). The exception was Tesco which offered 18 different dishes – the only retailer in our survey with a specific plant-based (vegan) range, Wicked Kitchen. Sainsbury’s and Waitrose each offered 9 choices but otherwise we found only between 4 and 1 plant-based choice in all other retailers, with Iceland offering none.

We found some, but not all, retailers selling vegetarian and vegan ranges at a premium, making these options less accessible to all customers. In particular, Tesco’s Wicked Kitchen range was the most expensive in these ranges at £4.00 each.

When it came to where meat used in meals was sourced, we found inconsistency in declaring country of origin labelling. While most retailers identified the provenance of meat in own-brand ready meals, we found Tesco, Asda and Iceland did not consistently provide this information.

Co-op and Waitrose were the only retailers we found in our survey to use British meat in all their own-brand ready meals.^b But overall, we estimated that less than half of the meat used in ready meals on supermarket shelves is sourced from the UK. There was a clear distinction in the use of UK meat between ranges; we found 80% of premium ranges using UK meat, compared to 52% in regular ranges and only 32% in value ranges. A significant amount of chicken (35% of meals where provenance was indicated) – and all of the chicken in value range meals was sourced from Thailand^c or less frequently, from Brazil.

Eating Better wants to see support for British farmers go hand in hand with ‘better’ meat produced to higher animal welfare and environmental standards. While retailers are generally keen to promote the provenance and quality of the fresh meat they sell – we found this didn’t generally apply to meat used as an ingredient in ready meals, with very few retailers using higher animal welfare certification schemes and/or indicating this on labels. We found only three retailers (M&S, Waitrose and Co-op) included ingredient meat sourced for their own-brand ready meals in their farm animal welfare policies. Otherwise, we found only one product from another retailer labelled as containing meat certified to higher welfare standards: Lidl’s own-brand Chef Select Spaghetti Carbonara, containing RSPCA Assured pork. We also found no organic meals on offer.

a Some meals contained more than one type of meat – hence figures add up to more than 100%.

b Except for Spanish Chorizo in Co-op paella dish and Waitrose sourcing some New Zealand lamb depending on the season.

c Some products indicated chicken could be sourced from Thailand or EU.

What we'd like to see

Eating Better is encouraging food retailers to seize the business opportunities – as well as their responsibilities towards their customers health and the health of the planet – in the burgeoning flexitarian market of people who are cutting back on the amount of meat they eat. We'd also like to see supermarkets serving customers expectations for 'better' meat produced to higher animal welfare and environmental standards.

We are calling on retailers to:

- Set targets to increase the number and proportion of plant-based and healthier vegetarian ready meals.
- Label provenance of all meat used in ready meals as required for fresh meat.
- Increase the proportion of UK sourced meat alongside commitment to higher animal welfare standards (minimum RSPCA Assured).
- Price vegetarian & plant rich dishes at a comparatively affordable price for customers, not as a premium niche market. Consider price promotions and placement within store to encourage trials and repeat purchasing.
- Ensure ready meal ranges are in-line with UK Government advice (Eatwell Guide) to encourage increased consumption of pulses, vegetables and whole grains and reduced consumption of livestock products, particularly red and processed meats.

Eating Better is encouraging everyone to eat more healthily and sustainably by shifting to more plant-based eating with smaller quantities of meat. We're encouraging a '**less and better**' approach to meat eating⁵ – meaning less of all types of meat (red, white and processed) and particularly less meat from intensive production systems.

Eating Better's tips for meat-free and less meat meals

- Use half the meat in curries, casseroles and stews and double the amount of vegetables and/or pulses.
- Replace some or all of the mince in spaghetti bolognese, cottage pie and lasagne with lentils, or meat substitutes like soy mince or Quorn.
- Buy smaller portions of meat and use to add flavour, rather than as the main ingredient.
- Try eating more meat-free meals and having one or two 'meat-free days' each week. Look out for vegetarian options or make vegetarian versions of your favourite dishes like vegetable curry. Go easy on the cheese though, as it's high in fat and salt.
- If possible, use the money you save from eating less meat to choose meat that is free-range and outdoor reared and produced to higher animal welfare standards such as RSPCA Assured or organic.

If ready meals are part of your or your family's menu, then try swapping some meat-based dishes for vegetarian or plant-based options. But go easy on the cheese-based options – as we found these to be high in calories (cheese is also high in saturated fat and salt) and will typically pack a weighty carbon footprint as well. If choosing fish, look for sustainably sourced options. And if your supermarket only provides a limited choice – let them know you'd like a better selection.

Rather than buying ready meals, try making your own. There is a huge amount of help and suggestions online on cooking easy to prepare tasty meat-free or less meat meals.

The survey

The purpose of our ready meals survey was to find out how food retailers are responding to the growing demand for 'less and better' meat eating by supplying more vegetarian, flexitarian and plant-based (vegan) ready meals options. We also wanted to find out where meat in ready meals is sourced and the extent to which this includes 'better' meat produced to higher animal welfare or sustainability standards.

Our survey looked at availability of ready meal products in ten food retailers and supermarkets: Aldi, Asda, Co-op, Iceland, Lidl, Marks & Spencer, Morrisons, Sainsbury's, Tesco and Waitrose.

We included both own-brand and branded meals, chilled and frozen options and all ranges available (such as premium, regular, healthy and value ranges). We only included main meals designed to be eaten hot and excluded side dishes, takeaway packs, kids' ready meals, light and small meals such as lunch pots, salad pots, single items such as pizzas, burgers, ribs, chicken kiev and jacket potatoes.

We recorded the number of meat and fish-based, vegetarian (egg and cheese) and meat-alternative and plant-based options available. From labels, we identified main ingredients, including types of meat (beef, lamb, pork, chicken, duck) as well as the provenance of livestock products (if stated), and claims for use of 'better' meat eg higher animal welfare. We also recorded prices, special offers and elements of nutritional content.

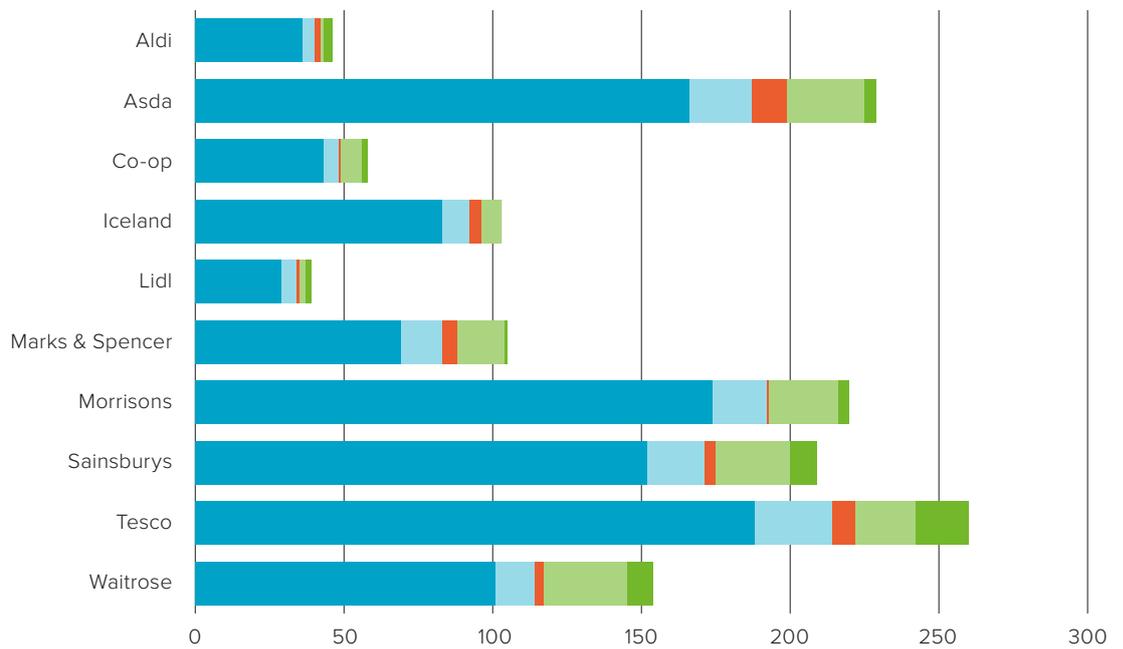
We collected the data online, where available (Tesco, Sainsbury's, Waitrose, Iceland, Asda, Morrisons) and in-store at large outlets in London for those not available online (Co-op, Aldi, Lidl, M&S). The survey took place between April and May 2018.

Where the same ready meal was available in different portion sizes, we only included one portion size in our analysis. Where the same branded products were found in different retailers, we included all of them in total products for each retailer, but when analysing the total data set from all retailers, branded products were only included once. The statistics in this report include both branded and own-brand products unless specified otherwise.

We also contacted retailers directly for a list of their ready meals (own-brand and branded) indicating which are vegetarian and/or plant-based. We also asked if they have introduced or have plans to introduce more flexitarian/vegetarian/plant-based options; to provide details of any commitments, policies or plans towards helping customers shift towards more plant-based eating with ‘less and better’ meat and dairy consumption; and specific policies towards less and better meat including that used in ready meals.

We classified products as vegetarian either because they were labelled as such, or by our analysis of ingredients (where products were not specifically labelled as suitable for vegetarians). Vegetarian products may contain eggs or dairy products, but no meat, fish or seafood. We defined plant-based (vegan) products as those either labelled as suitable for vegans or which didn’t appear to contain animal products on the label.

Figure 1
Types and numbers of ready meals per retailer



| | Total | Meat | Fish / seafood | Meat and fish / seafood | Vegetarian | Vegan |
|-----------------|-------|------|----------------|-------------------------|------------|-------|
| Aldi | 46 | 36 | 4 | 2 | 1 | 3 |
| Asda | 229 | 166 | 21 | 12 | 26 | 4 |
| Co-op | 58 | 43 | 5 | 1 | 7 | 2 |
| Iceland | 103 | 83 | 9 | 4 | 7 | 0 |
| Lidl | 39 | 29 | 5 | 1 | 2 | 2 |
| Marks & Spencer | 105 | 69 | 14 | 5 | 16 | 1 |
| Morrisons | 220 | 174 | 18 | 1 | 23 | 4 |
| Sainsburys | 209 | 152 | 19 | 4 | 25 | 9 |
| Tesco | 260 | 188 | 26 | 8 | 20 | 18 |
| Waitrose | 154 | 101 | 13 | 3 | 28 | 9 |

What we found

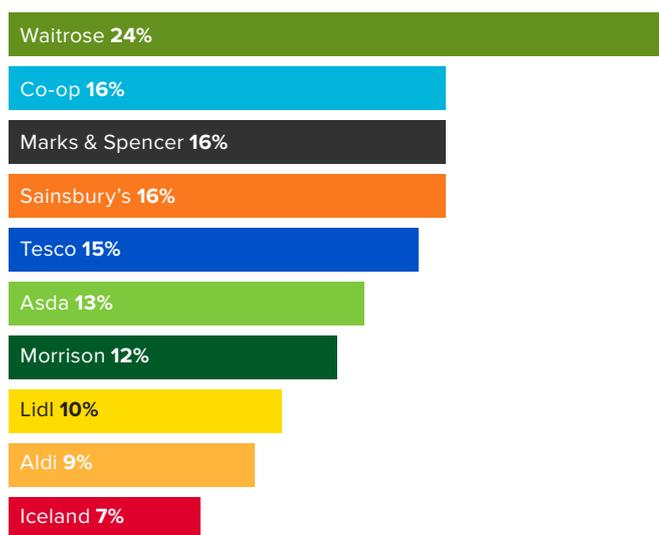
In total we found 1,423 ready meals available from the 10 retailers with Tesco, Asda, Sainsbury's and Morrisons providing the largest ranges, reflecting the size of these larger supermarkets.

The majority (83%) were retailer own-brands, though we also found branded ready meals in all supermarkets except M&S. We found 22 different brands such as Young's (fish), Sharwood's (Asian), Charlie Bigham (premium) and Weight Watchers by Heinz Food (healthy eating). The most stocked vegetarian and plant-based brands were meat-substitute brand Quorn (stocked in Waitrose, Tesco, Sainsbury's, Morrisons, Asda), Amy's Kitchen (gluten-free) in Waitrose, Tesco, Sainsbury's, Morrisons, Asda and BOL Foods (vegetarian and plant-based) available in three supermarkets (Waitrose, Tesco, Sainsbury's).

Removing duplicate branded ready meals from the total gave us a total of 1350 different ready meals, 71% of these were chilled and 29% were frozen.

Figure 2

Percentage of total ready meals available in each retailer that were vegetarian or plant based



Wicked Kitchen – Gunpowder Potato Chana Masala from Tesco.

Main ingredients: Meat is still central

We found that meat still dominates the ready meal aisles. Three out of four (77%) of the 1,350 different own-brand and branded ready meals surveyed from 10 retailers contained meat. Chicken was the most frequently used meat (in 47% of meat-containing dishes), followed by beef (33%), pork (26%), lamb (7%), and duck and turkey (<1%). Some meals contained more than one type of meat hence figures add up to more than 100%.

10% of meals contained fish and/or seafood. A small number of products contained meat and fish/seafood (eg paella). On average the more expensive premium ranges had higher meat content (20%) compared with regular ranges (18%), and cheaper 'value' ranges had the lowest (14%).

By comparison, only 184 meals (14% of total number) were vegetarian, meat substitutes or plant-based eg containing pulses or tofu (3%), meat substitutes (1%) or mainly vegetables (2%). Totally plant-based (vegan) meals comprised only 3%.

All retailers provided some vegetarian and plant-based options either in their own-brand ranges (Asda, M&S, Morrisons, Sainsbury's, Tesco, Waitrose) and/or by offering branded choices. Tesco was the only retailer to have its own vegan range, Wicked Kitchen, which launched in January 2018, though we also found 3 vegan products in Aldi under the Soulful Foods brand.

However, availability of vegetarian and plant-based choices varied considerably between retailers (see Figure 2). We found Waitrose offered the highest percentage (24%) of vegetarian or plant-based ready meal choices. Co-op, M&S, Sainsbury's and Tesco provided 15-16%. Asda, Morrisons, Lidl, Iceland and Aldi provided the least choice (12%-7%).

In June 2018 Waitrose launched a wider range of vegan and vegetarian foods, including more ready meals.⁵ Co-op also told us that they are planning to expand their selection of vegan and vegetarian products throughout the year.

Pricing and promotion of vegetarian and vegan ranges

We wanted to see how accessible retailers made their vegetarian and vegan ranges to customers through pricing and promotions. We found meals within the vegetarian ranges were on average slightly more expensive (£2.66) than the regular ranges (£2.34). Not all retailers sold these ranges at higher prices and it was encouraging that we found Sainsbury's, Asda and M&S vegetarian ranges were on average slightly cheaper than their regular range, a good step towards making vegetarian options more accessible.

More expensive though, was Tesco's Wicked Kitchen vegan meal range costing £4 each, 67% more expensive than the average price of Tesco's regular range, and 60% more expensive than its vegetarian range. Morrisons' and Waitrose's vegetarian ranges were on average also more expensive than their own-brand regular range, 15% and 20% respectively.

We also found that offers and discounts on vegetarian ranges were not as common as offers on regular ranges, except at Morrisons and Tesco.

Nutrition falls short

We found that higher calorie meals tended to be those containing cheese in either meat, fish or vegetarian options. 90% of the vegetarian ready meals were cheese-based and typically higher in calories – on average 497 calories per serving – compared with tofu or pulses-based dishes (390 calories) or vegetable-based meals (418 calories). Even meat-based ready meals were on average lower (483 calories). Highest calorie meals were macaroni cheese eg Tesco Macaroni Cheese with 760 calories or the Waitrose Italian Macaroni Cheese with Cauliflower and Squash with 696 calories.

Additionally, cheese-based ready meals will also have a relatively high GHG (greenhouse gas) footprint, as hard cheese has 8-10 times the GHG impact of milk, and is higher (per kg) than pork.⁶

Within retailers' 'healthy' ranges of ready meals, we were surprised to find a paucity of vegetable-based dishes. It would appear that these ranges tended to focus on offering lower calorie options rather than necessarily offering broader nutritional benefits. Only 16 'healthy eating' products (6%) were plant based, 12 of which were pulse-based. 12% were fish based and 3% dairy (mainly cheese-based). However, 8 out of 10 (79%) 'healthy' ready meals contained meat, often chicken (55%), but also red (beef, lamb and pork) and processed meats such as sausages and ham (45%). As UK Government advice on eating healthily and sustainably (**Eatwell Guide**) advises only moderate consumption of animal products (particularly red and processed meat) while increasing consumption of pulses and vegetables, we would like to see retailers reflecting this in their meal choices, especially their 'healthy' ranges.



Where does the meat in ready meals come from?

We found inconsistent labelling of the provenance of meat used in ready meals. Overall 7 out of 10 (72%) meat-based ready meals indicated the country of origin of meat ingredients. The majority of retailers provided this information on own-brand ready meals. However, Tesco, Asda and Iceland did not provide this information for all own-brand products. Own-brand products were more likely to indicate country of origin than branded products.

57% of meals labelled indicated the meat was British sourced. But with nearly a third (30%) of ready meals giving no indication of provenance, we presume that meat used in these dishes is unlikely to have been sourced from the UK. Hence, we estimate that less than half of the meat used in ready meals on supermarket shelves is sourced from the UK.

There was a clear distinction in the use of UK sourced meat between meal ranges, with 80% of premium ranges using UK meat, compared to 52% in regular ranges and only 32% in value ranges. Co-op and Waitrose were the only retailers to use British meat in all their ready meals except for Spanish Chorizo in Co-op paella and Waitrose sourcing some New Zealand lamb depending on the season. We found a third (35%) of chicken-containing meals labelled as sourced from Thailand^d with a small number from Brazil. All chicken in value range meals that indicated provenance was sourced from Thailand or in one case from Brazil.

Country of origin labelling is mandatory for meat but not for meat used in prepared foods, such as ready meals. After the horsemeat scandal of 2013 there were calls for the EU to extend country of origin rules for meat labelling to ready meals. While this information can be declared voluntarily it is not yet a requirement, though we would encourage all retailers and manufacturers to declare this information.

The use of better meat in ready meals

We sought to identify the extent to which 'better' meat – produced to higher animal welfare or environmental standards – was used in ready meals. While retailers are generally keen to promote the provenance and quality of the fresh meat they sell, we found this didn't generally apply to meat used as ingredients in ready meals with very few retailers using higher animal welfare certification schemes and/or indicating this on labels. We also found no organic meals, however 'Amy's Kitchen' brand used a high percentage of organic ingredients though these were mainly plant based ingredients rather than meat.

We found only three retailers (M&S, Waitrose and Co-op) included ingredient meat sourced for their own-brand ready meals in their farm animal welfare policies. These companies have previously been rated as the retailers doing the most to stock animal products from animals raised under better welfare conditions.⁷

M&S policies indicate that meat, including that used in ready meals is M&S assured, which the company says has higher standards than current legislation and industry farm assurance standards (eg Red Tractor) including for farm animal welfare.

^d Some products indicated chicken could be sourced from Thailand or EU.

Waitrose also has its own assurance scheme which includes higher animal welfare standards. In our survey, we found some of Waitrose pork dishes labelled as made with 'pork from pigs outdoor bred and then housed in straw bedded airy barns'.

Otherwise, we only found one other product labelled as containing meat certified to higher welfare standards: Lidl's own-brand Chef Select Spaghetti Carbonara, containing RSPCA Assured pork.

We did find a very small percentage (3.5%) of beef and lamb products certified as Red Tractor, found in Asda and Lidl. While Red Tractor indicates UK provenance and traceability, its standards do not generally indicate higher animal welfare or environmental standards above the minimum legal requirements. And while Asda labelled the use of Red Tractor Assured beef in all its chilled ready meals, this was not the case for its frozen products.

For all other retailers, we found no labelling of meat sourced to higher standards. By comparison with meat ingredients, we noted that over two-thirds (68%) of eggs used in ready meals were labelled as free-range.

As market research company Mintel⁸ report that 51% of ready meal buyers would be more likely to buy a ready meal with a guarantee of high animal welfare, we think there is a business opportunity that is currently being missed for retailers not yet offering higher welfare meat in products.

Role of food companies

Food companies have an important role in helping people make the shift towards more healthy and sustainable diets with more plant-based eating and less and better meat and dairy. Our 2017 briefing **The Future of Eating is Flexitarian: Companies leading the way** demonstrated the burgeoning response of food companies and supermarkets to the huge rise in awareness and eating habits towards meat-reduction, flexitarian and plant-based eating.

Our 2017 YouGov survey found that people want companies to offer more meat-free and lower meat choices to help them reduce their meat consumption.⁹ Our survey also revealed that 44% of people in Britain are willing or already cutting down or cutting out meat. Numerous surveys have confirmed this trend towards flexitarianism, where people reduce their meat consumption without cutting it out completely and in 2017 Kantar Worldpanel reported that 41% of the UK population is now flexitarian, meat-reducers or semi-vegetarians.¹⁰ Eating Better is encouraging more companies to embrace this business opportunity.

Eating healthily and sustainably is key to maintaining our health and the health of the planet. There is strong evidence that a predominantly plant-based diet with small quantities of livestock products is necessary to tackle the rising rates of obesity, heart disease, cancer and diabetes and their associated economic and societal cost. At the same time evidence shows that shifting towards a more plant-based diet with less and better meat is key to meeting the 2015 Paris Climate Agreement commitments to keep global temperatures from rising.

Our report **Principles for eating meat and dairy more sustainably: the 'less and better' approach**, aims to navigate a way through the complexities of healthy and sustainable eating and provide practical guidance.

Eating Better will continue to benchmark food companies and their product categories to chart progress towards helping people shift towards a more plant-based diet with less and better meat.

Endnotes

- 1 Euromonitor International 2018 Ready Meals in the United Kingdom – Country Report Nov 2017
- 2 MarketLine (2015) Ready Meals in the United Kingdom – MarketLine Industry Profile
- 3 Mintel (2017) Attitudes towards Ready Meals and Ready-to-Cook Foods
- 4 YouGov for Eating Better (2017) Survey: Eating Less Meat. Online at: <http://bit.ly/EBYouGov2017>.
- 5 http://waitrose.pressarea.com/pressrelease/details/78/PRODUCT%20NEWS_12/9747
- 6 <https://www.eating-better.org/learn-more/q-a.html>
- 7 <http://www.ethicalconsumer.org/ethicalreports/supermarketssectorreport/supermarketanimalwelfare.aspx>
- 8 Mintel (2017) Attitudes towards Ready Meals and Ready-to-Cook Foods
- 9 YouGov for Eating Better (2017) Survey: Eating Less Meat. Online at: <http://bit.ly/EBYouGov2017>. Total sample size was 1,715 adults. Fieldwork was undertaken between 21st - 23rd April 2017. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).
- 10 Mail Online (2017) March of the 'flexitarians': Half of us go vegetarian part-time by ditching meat for two days a week. Available at: <http://www.dailymail.co.uk/health/article-4247546/Half-vegetarian-two-days-week.html>

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Further copies of this briefing can be downloaded from <http://bit.ly/EB2018readymeals>.

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Who is Eating Better?

Eating Better is an alliance of over 50 civil society organisations working to build consensus and develop collaborative practical approaches to engage policy makers, food businesses and civil society to catalyse shifts towards healthy and sustainable eating patterns. Eating Better encourages a culture where we place greater value on the food we eat, the animals that provide it and the people who produce it.