



Eating Better



Ready meals

2020 SNAPSHOT SURVEY



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Our latest food category survey is bigger and more comprehensive than ever before.

We have surveyed all of the main UK supermarkets and collected a sample of over 2800 ready meals. This is what we found:

More plant-based products are making their way to the shelves. But not all supermarkets are making the same progress.

There is still too much meat and dairy: we found 84% of meals contain meat, fish and cheese.

A plant-based premium: plant-based meals are the most expensive in some supermarkets.

Ready meals shaping the food environment

For most people in the UK, eating a healthier more sustainable diet would mean eating more vegetables, fruit, beans, pulses and wholegrains, and cutting down on meat and cheese¹. But people can only make better choices where they are available, affordable and convenient.

This survey shows how well supermarkets are supporting healthier and more sustainable eating patterns by offering more vegetarian and plant-based options.

Why look at ready meals?

In the UK 88% of adults eat ready meals or ready-to-cook foods². 2 in 5 people eat ready meals every week³. What is available in the ready-meal aisle shapes our choices. The ready meal category is big, with a market value worth £3.9 billion⁴. For context, the retail egg market has a value of just over £1 billion⁵.

After years of ready meal sales growth, this has slowed and is now showing a small decline⁶. Consumer research shows that ready-meals' processed image is putting some people off, and healthier options are widely in demand⁷.

What we would like to see happen

Retailers are important in helping people make healthy and sustainable food choices, including moves to less and better meat and dairy and supporting people to eat more vegetables, fruit, beans, pulses and wholegrains.

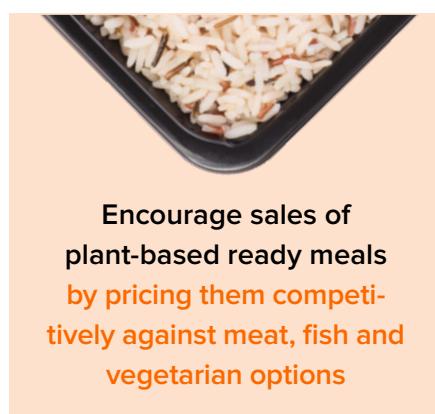
“The Food Foundation’s Broken Plate report illustrates much more action is required (and quickly) to transform our food system to deliver health, sustainability, and equity. Our typical diets are currently not delivering on any of these outcomes and the choice provided by food retailers is a big part of that picture.”

Anna Taylor OBE
Executive Director
The Food Foundation

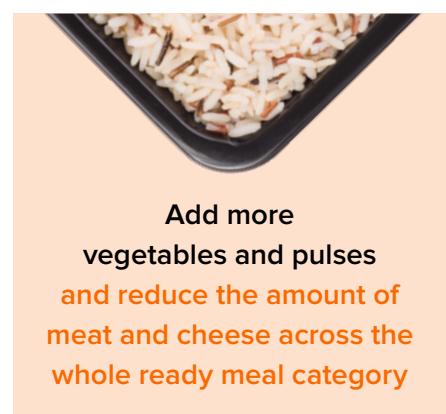
WE WOULD LIKE RETAILERS TO...



Reduce meat-based options so that they make up no more than 50% of the range



Encourage sales of plant-based ready meals by pricing them competitively against meat, fish and vegetarian options



Add more vegetables and pulses and reduce the amount of meat and cheese across the whole ready meal category

A wave of new plant-based launches

Public awareness of livestock's environmental impact is growing. Our [2019 YouGov Survey](#) showed that understanding had grown by 23% since 2017. We also found that 48% of people are willing or already committed to cutting down or cutting out meat⁸. Sales data reflects this with sales of all meat-free foods growing 40% from £582 million in 2014 to an estimated £816 million in 2019.⁸

Since our last survey two years ago, public interest in eating more plant-based food has continued to grow. In 2019 plant-based launches made up one fifth of all retail food new product development.⁹



Survey findings

Some progress

Meat-free options are increasing

572 out of 2404 (24%) of meals were vegetarian or plant-based – a 33% increase since 2018¹⁰.

Less meat

1641 out of 2404 (68%) of meals were meat-based – a 10% decrease since 2018¹¹.

More plant-based options across the board

Most retailers have expanded their plant-based options in the past two years.

Several retailers have greatly expanded their plant-based range

Aldi, Morrisons and Asda have more than doubled their plant-based and vegetarian ready-meals offer as a proportion of their range.

Vegetarian meals are the most affordable

Vegetarian meals have the lowest average price per portion.

A long way to go

Plant-based meal options are still very limited

84% of meals we surveyed contain either meat, fish or cheese. We want to see at least 50% plant-based.

A category dominated by meat

68% of meals contain meat (1641 out of 2404). In Iceland, we found a whopping 83% of meals contain meat.

Still plenty of cheese

A massive 70% of vegetarian meals contain cheese. This is an improvement on 2018 when the figure was an astounding 90%.

Choosing plant-based costs more

Plant-based meals are on average 19% more expensive than vegetarian meals. At Tesco, Sainsbury's, Co-op and Iceland plant-based meals were more expensive than meat, fish or vegetarian meals.

WHAT IS IN READY MEALS?



84% OF MEALS CONTAINED EITHER MEAT, FISH OR CHEESE

68% OF MEALS CONTAINED MEAT

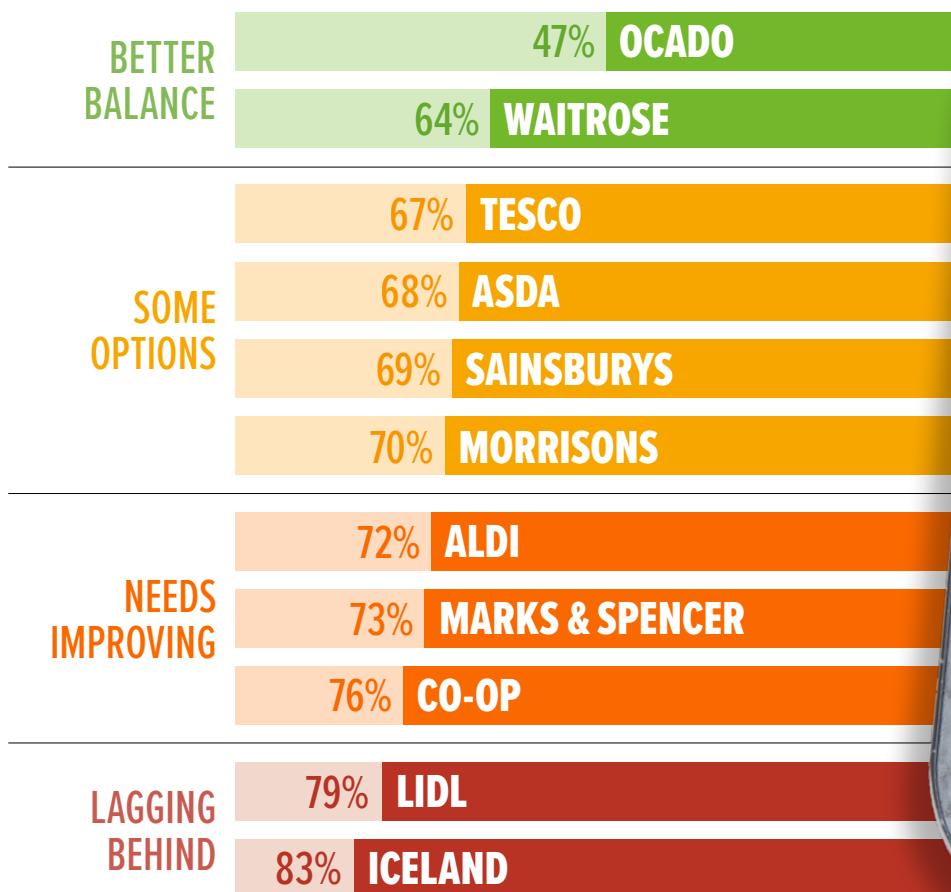
70% OF VEGETARIAN MEALS CONTAIN CHEESE

25%

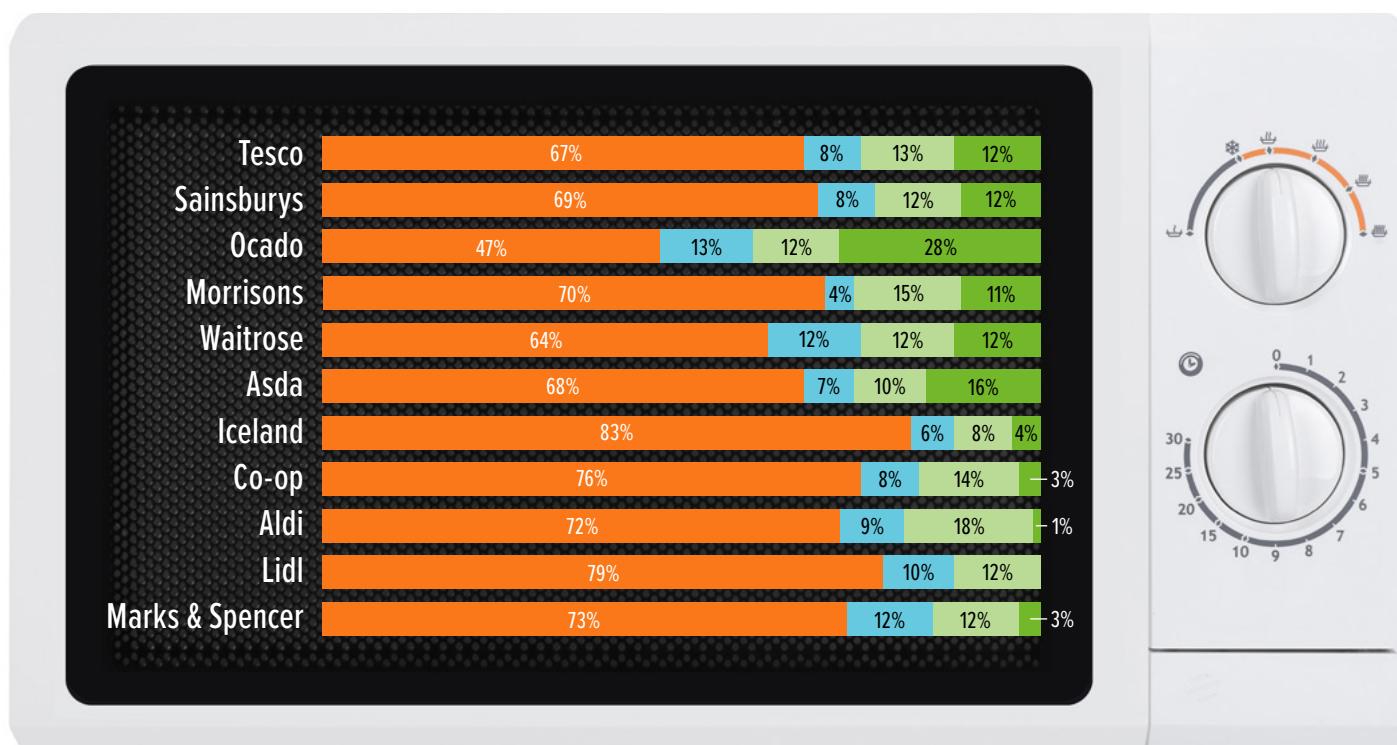
OF READY MEALS WERE EITHER VEGETARIAN OR PLANT-BASED

Survey findings

HOW MANY READY MEALS ARE MEAT-BASED?



READY MEAL PRODUCT TYPES BY RETAILER



Survey findings

SOME RETAILERS HAVE MADE PROGRESS

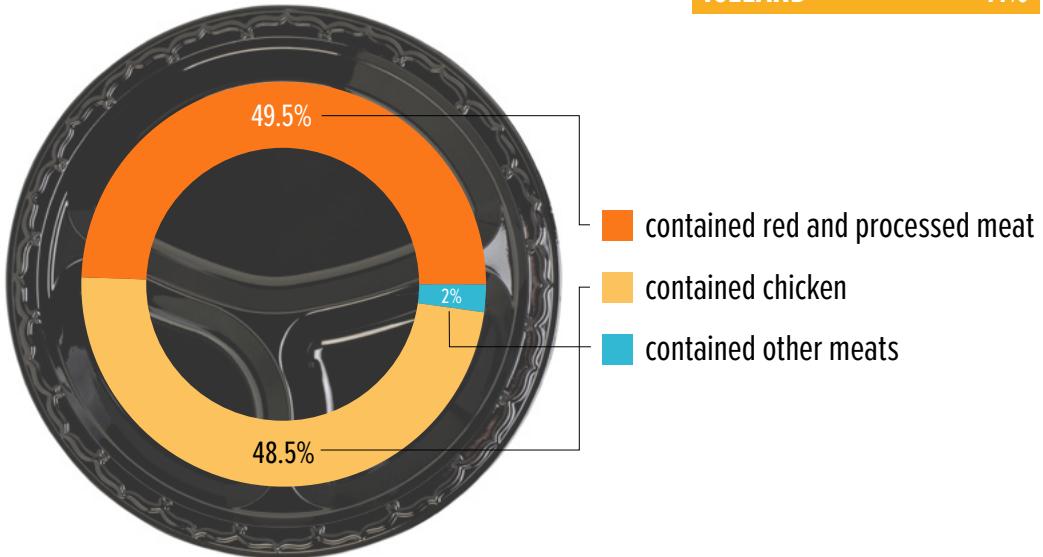
Change in the vegetarian and plant-based offer as a proportion of rangeⁱ

ⁱ Table figures show the percentage of the range that is plant based or vegetarian. Arrow figures show the percentage change in the plant based and vegetarian offer, as a proportion of the range.

	2018		2020
WAITROSE	24%	+53%	OCADO 40%
SAINSBURYS	16%	+49%	MORRISONS 25%
CO-OP	16%	+39%	ASDA 25%
MARKS & SPENCER	16%		TESCO 25%
TESCO	15%		WAITROSE 25%
ASDA	13%		SAINSBURYS 23%
MORRISONS	12%	+53%	ALDI 19%
LIDL	10%		CO-OP 16%
ALDI	9%		MARKS & SPENCER 15%
ICELAND	7%		LIDL 12%
			ICELAND 11%

WHICH MEATS DOMINATE READY MEALS?

68% of meals contained meat – of these...



VEGETARIAN MEALS ARE THE CHEAPEST PER PORTIONⁱⁱ



AT TESCO, SAINSBURY'S, CO-OP AND ICELAND, PLANT-BASED MEALS WERE THE MOST EXPENSIVE MEAL TYPE

ⁱⁱ Meal type price average from all supermarkets

How we conducted our survey

This survey includes 2803 ready meals available to buy in 11 major UK supermarkets in March 2020.

For the first time in our survey series, we complemented our in-store fieldwork with data from foodDB, a comprehensive, real-time database of food and drink products available online in the UK, developed at the Nuffield Department of Population Health, University of Oxford.

We used data from foodDB, for all ready meals available online in Tesco, Morrisons, Asda, Waitrose, Ocado, Co-op, Iceland and Sainsbury's.

Where online data was not available (Lidl, Aldi and M&S) Eating Better conducted fieldwork in-store.

Two large outlets in London were visited for each of these supermarkets, and each store was visited on two separate days. The online and fieldwork sets of data were added together and analysed by Eating Better.

In previous surveys we have analysed indicators of 'better' meat and dairy production, such as country of origin, standards and use of animal welfare certifications. This was not possible this year using foodDB. We plan to incorporate this analysis in future surveys.

What we included

We included both own-brand and branded meals, chilled and frozen options found in the 'ready meals' section of supermarkets. We only included main meals designed to be eaten hot. We used a broad definition of 'main' to include products that would either comprise a meal or else the main part of a meal. We excluded products classified as side dishes and pizzas. Where the same branded products were found in different retailers, we included all of them in total products for each retailer, providing a sample of 2803 meals. When analysing the total data set from all retailers, branded products were only included once, providing a sample of 2404 meals.

The ingredients text for each product were used to classify it into one of four categories: 'meat', 'fish', 'vegetarian', or 'plant-based'. Vegetarian products may contain eggs or dairy products, but no meat, fish or seafood. We defined plant-based products as those either labelled as suitable for vegans or which did not appear to contain animal products on the label.

Ingredients' lists were also used to identify core ingredients, including type of meat (beef, lamb, pork, chicken, turkey, duck) and cheese. Where a dish contained several types of meat, we classified it according to the one used in greatest quantity (listed first). We also recorded meal prices (per portion) and special offers.

foodDB: a big data approach to the analysis of the marketplace

Since 2017, the Nuffield Department of Population Health, University of Oxford, have been collecting data as part of the foodDB project – a software platform to monitor the retail food system in the UK in real time.¹² With a focus on products available to buy online in all major UK supermarkets, foodDB currently collects information on over 120,000 food and drink products every week. It is a powerful tool to track and evaluate changes in the marketplace, and it has been used to evaluate how the UK's tax on sugary drinks has changed the products available.¹³

foodDB is currently being used to analyse:¹⁴

- the prevalence of front of pack labels, using machine learning to automatically identify product images
- the type and frequency of promotions on food and drink in the UK



References

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Eating Better is an alliance of over 60 organisations accelerating action for less and better meat and dairy for health, environment, animal welfare and social justice. We inspire and equip people, business and government, so that we can all eat better.

Our **Better by half** roadmap, provides the required actions to support people to eat better for themselves and the planet. We recognise retailers are central to helping people make better food choices.

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Tracking change on the high street

Eating Better surveys retailers and high street chains on their offer of healthier and sustainable foods. Take a look at Eating Better's [2018 Ready Meals Survey](#), and our Sandwiches Unwrapped surveys in [2019](#), [2016](#) and [2015](#).