



Ready Meals 2021 Snapshot Survey



Introduction

Last year the pandemic shifted shopping and eating habits, while exposing insecurities and vulnerabilities.¹ Reports indicate we looked more closely at our relationship with food; how it's produced and what impact it has on our health and the environment.²

With home-working and restrictions on our movements, we shopped locally, cooked from scratch and relied less on convenience foods.

During Covid the ready meals market, already in decline,³ had to compete against home deliveries from food service outlets and meal kits offering easy scratch-cooking. However, as we emerge from the pandemic and the country fully reopens, it's expected the convenience, accessibility and affordability of ready meals will see demand and sales pick up again.⁴

Supermarkets are pledging to be more sustainable and consumer demand for greener, healthier food is growing, particularly among the younger generation. Our YouGov survey in 2019 found that a quarter of 18-year-olds are now vegetarian or vegan, with concerns about climate change and nature loss, driving the shift to more sustainable eating.⁵ Similarly, in a subsequent Yonder poll last year, we found more than a fifth of those surveyed were eating less meat than the previous year, with 65% willing to reduce their meat consumption with health being a driving factor.⁶

In that same poll, people wanted more support to make healthy and sustainable food choices. When it comes to ready meals, the challenge for retailers is to marry convenience with health and sustainability, by offering more plant-based products and reducing meat and dairy content across their ranges.

Our 2021 snapshot survey of ready meals shows there's been progress, particularly on the growth of plant-based meals, which is now the fastest growing category and becoming more affordable.

However, across the sample of 2743 meals, there's still a considerable emphasis on meat and dairy, with a number of retailers making very modest progress, despite announcing corporate climate commitments. A recent report by our alliance member, Feedback, indicated that supermarkets are failing to translate their environmental pledges into practice and are still heavily focused on promoting meat and dairy.⁷

With the second part of the National Food Strategy expected soon, it's likely retailers will come under even more pressure to address our overconsumption of meat and dairy and go further, faster to demonstrate they're part of the solution.

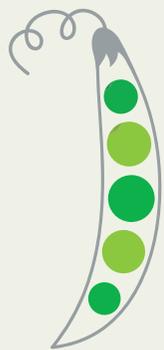
Retailers' climate commitments

Many UK retailers have pledged to offer more climate-friendly food and transform their operations and supply chains to reach net-zero by 2040, but are their commitments translating into changes in the offer?

Eight out of ten retailers featured in our report have committed to achieving net-zero by 2040 through the British Retail Consortium Climate Action Roadmap, with Tesco and Waitrose having recently brought forward their net-zero targets to 2035.

Our survey shows that while some retailers are matching words with actions by offering more choice on plant-based meals and reducing meat content, others have work to do to meet the pledges they have made.

- Tesco has promised to increase sales of meat alternatives by 300% by 2025 and works with WWF to improve the sustainability of the average UK basket.
- ALDI works with the British Dietetic Association to help customers understand more about healthy and sustainable shopping habits.
- The Co-op has committed to cutting the cost of its plant-based range to the same price as equivalent meat and dairy-based products.
- Sainsbury's, the official sponsor of CoP26, has committed to reaching net-zero in its operations by 2040 and has recently launched a new campaign "Helping everyone eat better."
- Iceland has announced it will double its meat-free range by Summer 2021.



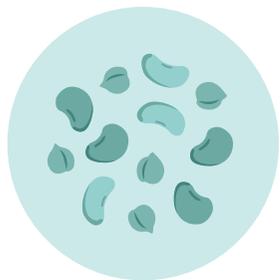
**Peas
Please**
Making a pledge
for more veg

ALDI, Asda, Co-op, Sainsbury's, Tesco and Waitrose have all signed up to *Peas Please*, an initiative from Eating Better alliance member Food Foundation, pledging to play their part in helping everyone eat an extra portion of veg a day. Asda has pledged to increase the number of veg options in their lunchtime meal deals and Tesco to increase the proportion of its ready meals, which contain at least one of the recommended five a day.

What we want retailers to do

Retailers influence how and what we eat and have a responsibility to help us make healthy and sustainable food choices: this includes encouraging us to eat less and better meat and dairy and more vegetables, fruit, beans, pulses and wholegrains.

Our [Better by Half: a roadmap to less and better meat and dairy](#) details the actions retailers need to take to accelerate the necessary reduction in meat and dairy consumption in the ready meals category, including:



Encourage the sale of plant-based foods and increase the amount of vegetables and pulses in ready meals



Plant-based meals to be priced competitively against meat, fish and vegetarian options



Meat-based options to be reduced, so that they make up no more than 50% of the ready meals range

Why ready meals?

According to the latest research by Mintel, 86% of UK adults eat ready meals, with three in ten people eating chilled ready meals at least once a week.⁴

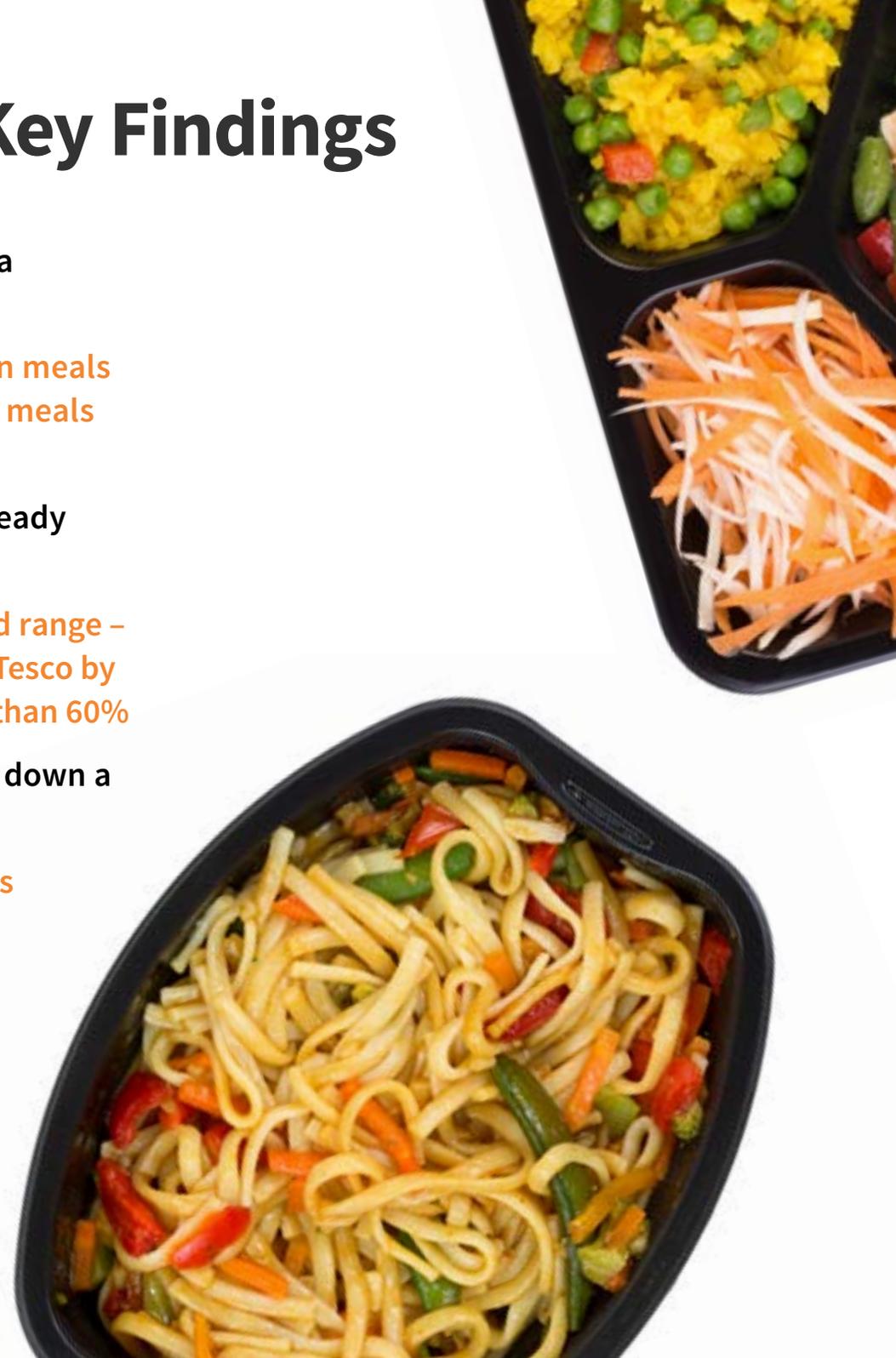
Convenience and cost are the key drivers of this market, as well as the ability to easily try new cuisine without investing in lots of new ingredients. Ready meals are also an affordable and accessible way for some people, with limited access to cooking facilities, to enjoy a hot meal.

The ready meal category is large and worth nearly four million pounds.⁸

Eating Better tracks progress towards more sustainable options and examines if retailers' offers on the supermarket shelves support the transition to healthier and sustainable diets for all.

2021 Ready Meals Survey Key Findings

- Plant-based meals are the fastest growing category, with a growth of 92% since 2018
- There's been a 50% increase in plant-based and vegetarian meals since 2018, with our survey showing that one in five ready meals are now plant-based or vegetarian
- Plant-based and vegetarian meals are now the cheapest ready meal options at most retailers
- Four supermarkets have greatly increased their plant-based range – ALDI by 175% (now a quarter of its ready meals range) and Tesco by 103%, while the Co-op and Morrisons are both up by more than 60%
- 62% of the vegetarian meals we surveyed contain cheese, down a third in three years
- The number of meals with meat as the main ingredient has dropped by 9% since 2018, although 70% of the ready meals we surveyed contain meat
- Three retailers have made significant reductions with their meat options over the last three years – ALDI by 15%, the Co-op by 14% and Tesco by 12%





One of our key asks of retailers was to offer more choice on plant-based meals, so it's good to see this is the fastest growing category. The other was to make plant-based more affordable, which most supermarkets have done. Climate-friendly food should be mainstream and shouldn't cost more. Now, we need the same drive to continue reducing meat content across the ready meal ranges of all retailers."

Simon Billing

Executive Director, Eating Better



Retailers compared

50%



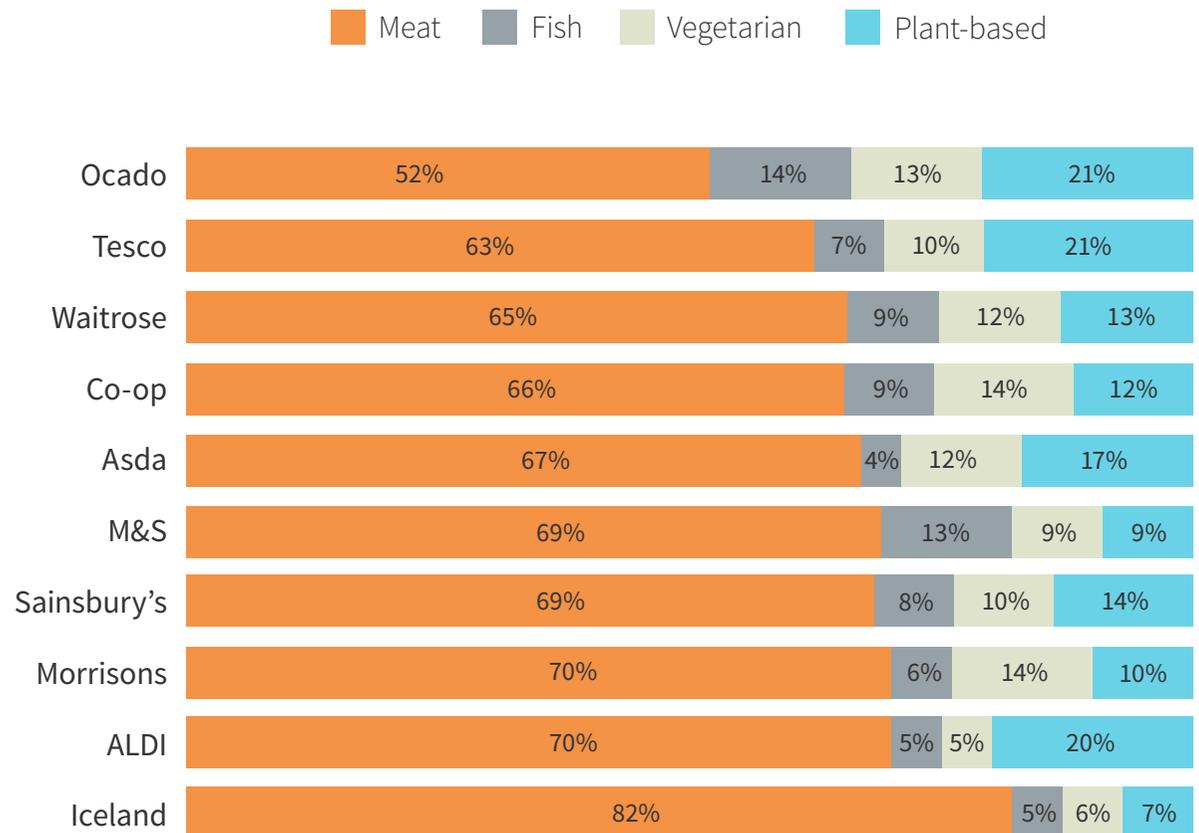
There's been a **50% increase** in plant-based and vegetarian meals since 2018, with our survey showing that **one in five** ready meals are now plant-based or vegetarian, with the fastest growing range being plant-based – **up 92%** in three years.

9%



70% of meals contain meat, a **drop of 9% since 2018**. None of the retailers meet our called-for target of **no more than 50%** of the range being meat-based.

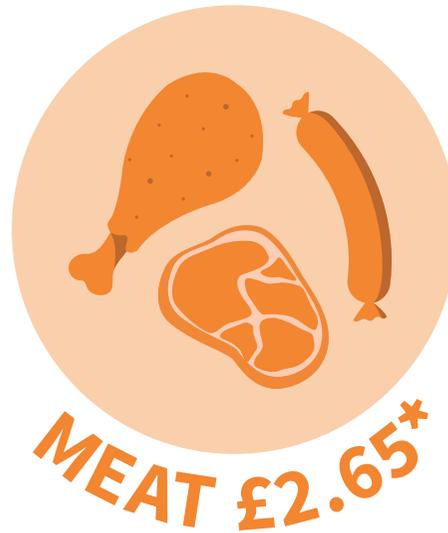
Comparison of full ready-meal range by retailer



Progress on plant-based meals

This year, we found **267** out of **2318** meals were plant-based. **It's the fastest growing category – up by 92% since our 2018 survey.**

Our 2021 survey shows **plant-based meals are now cheaper per portion than meat meals** at most retailers, a marked change on last year when they were the most expensive at several supermarkets.



*Average price per portion, weighted average of all supermarkets, 2021 data





“

It is positive to see major retailers providing consumers with greater choice and more balance between animal and plant-based sources of protein. As we outline in our One Blue Dot campaign, the UK diet as a whole needs to change if we are to meet our ambitious net zero carbon targets. That means reducing meat, moderating dairy and increasing fruit, vegetables and plant-based sources of protein. We hope the trends identified here continue, with more ready meal options that are better for our health and that of the planet.”

Caroline Bovey BEM RD

Chair of the British Dietetic Association

Who is offering more climate-friendly meals?

There's been a 50% increase in the range of vegetarian and plant-based meals since 2018.
Most supermarkets have increased their offers, but with wide variation and some by only modest amounts.

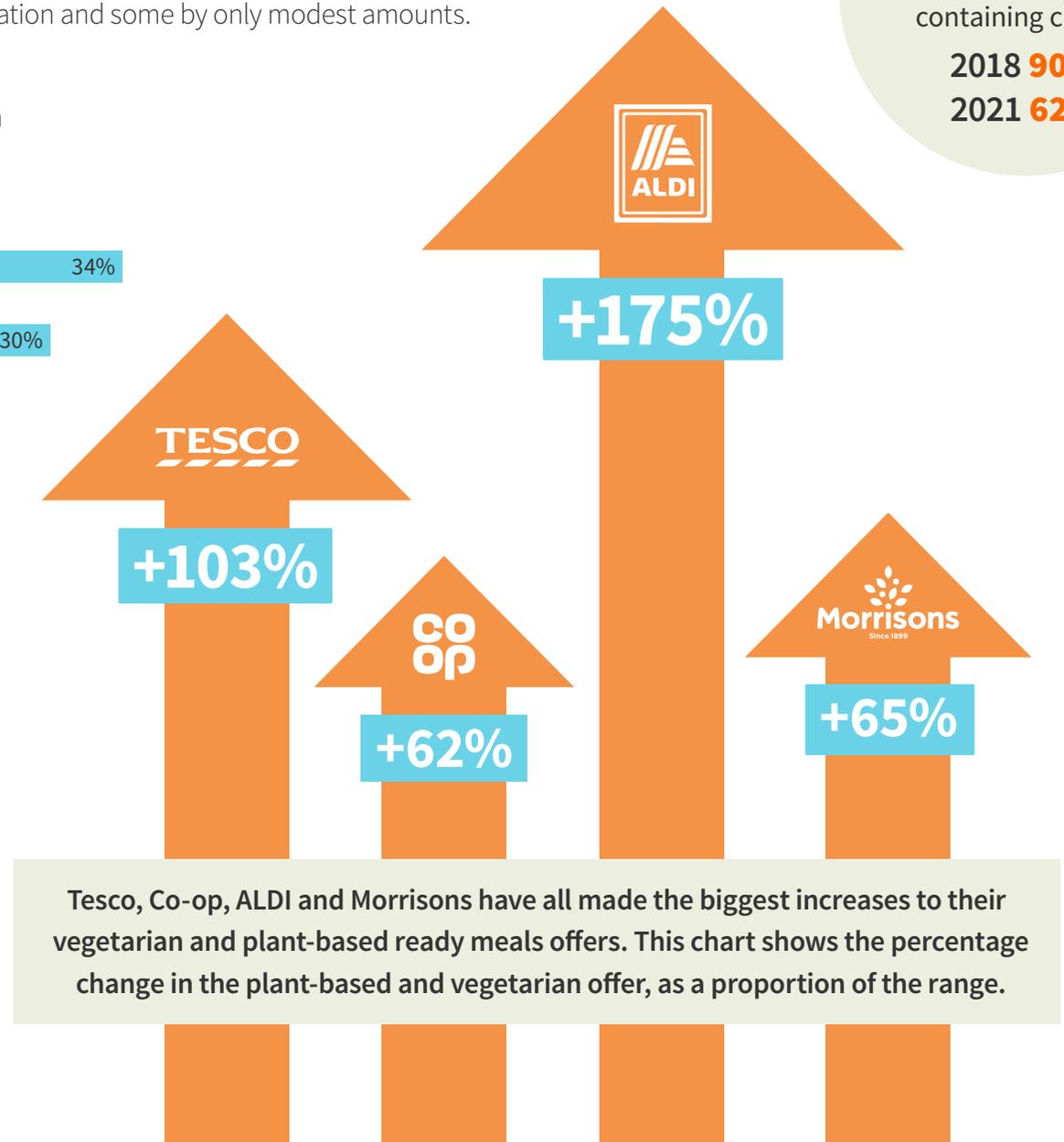
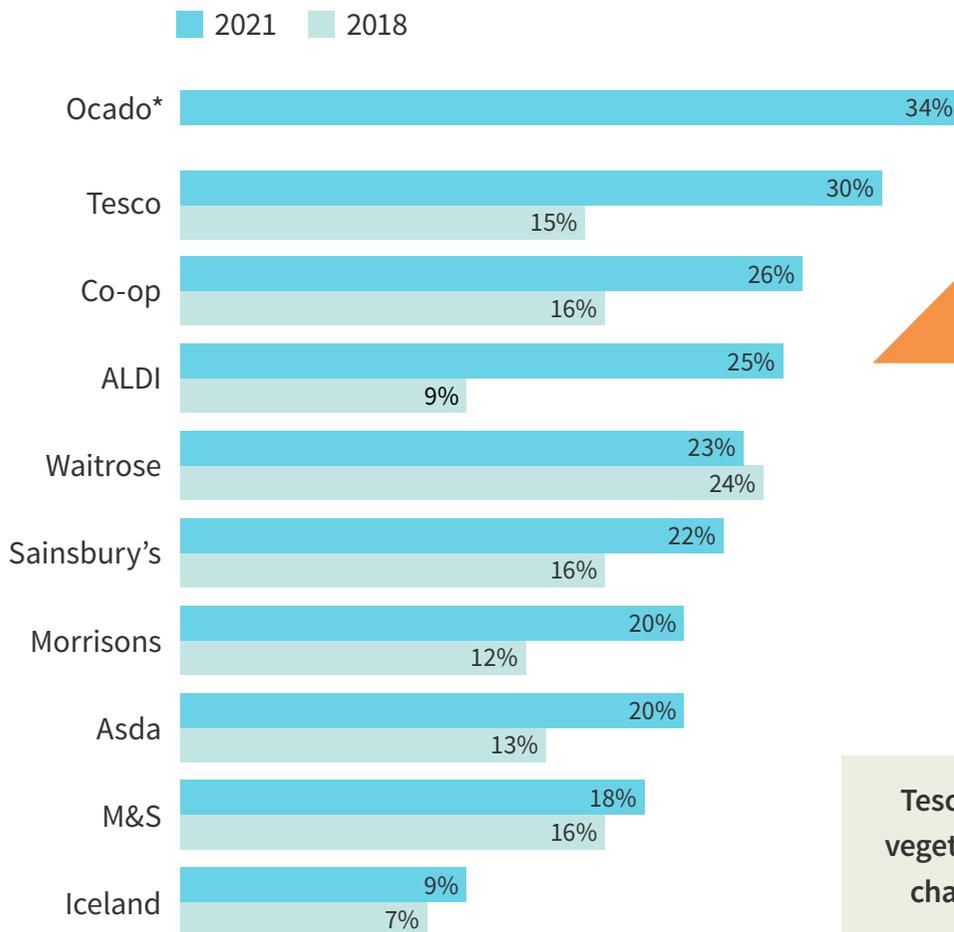
**MOVING IN THE
RIGHT DIRECTION**

Vegetarian meals
containing cheese

2018 **90%**

2021 **62%**

Percentage of the range that is plant-based and vegetarian



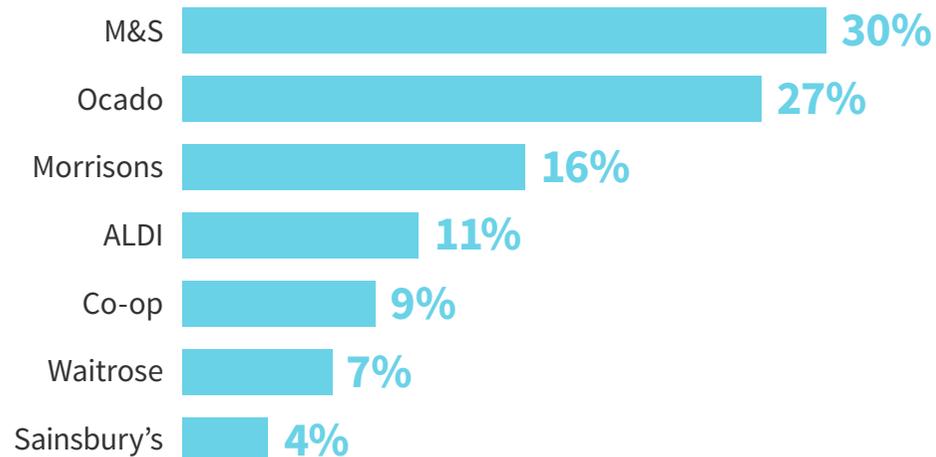
Tesco, Co-op, ALDI and Morrisons have all made the biggest increases to their vegetarian and plant-based ready meals offers. This chart shows the percentage change in the plant-based and vegetarian offer, as a proportion of the range.

*For 2018 see notes on P11

Movement on price

At the majority of retailers we surveyed plant-based meals are now priced competitively in comparison to meat offers, which supports commitments to help consumers choose healthier options. In seven out of ten supermarkets, meat meals cost more than plant-based meals, making it more affordable to eat healthier and sustainably.

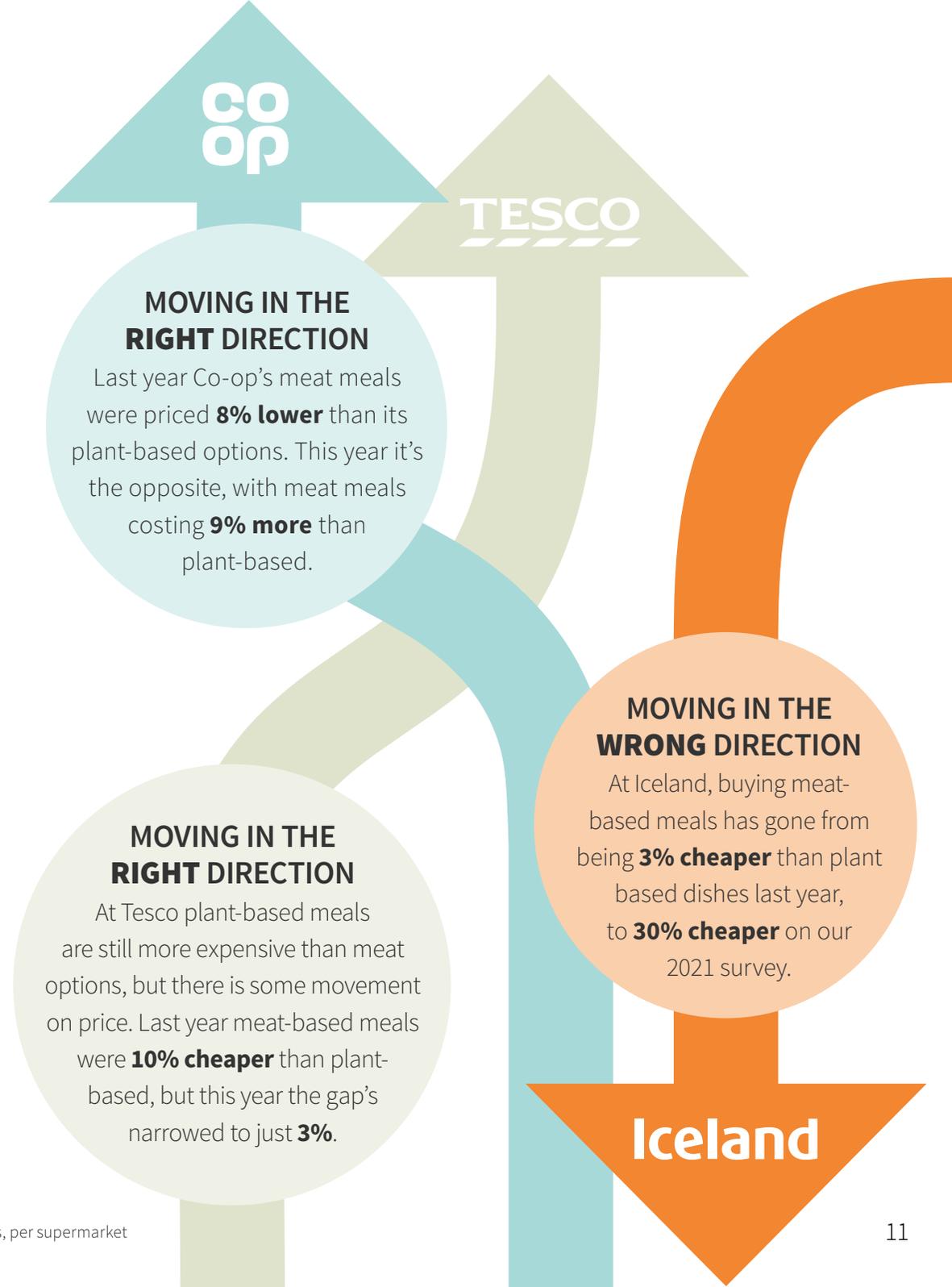
Meat meals cost *more* than plant-based*



Meat meals cost *less* than plant-based*

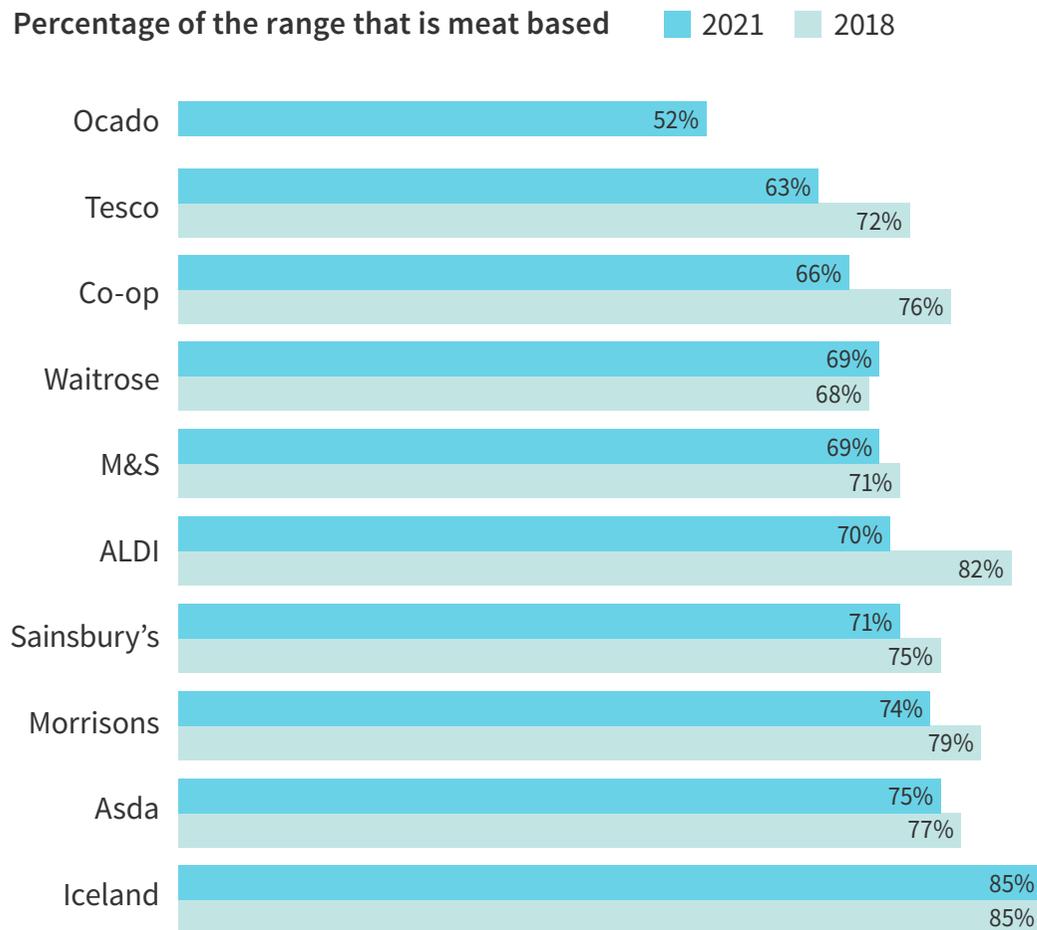


*Percentage difference in average price per portion of meat meals to plant based meals, per supermarket

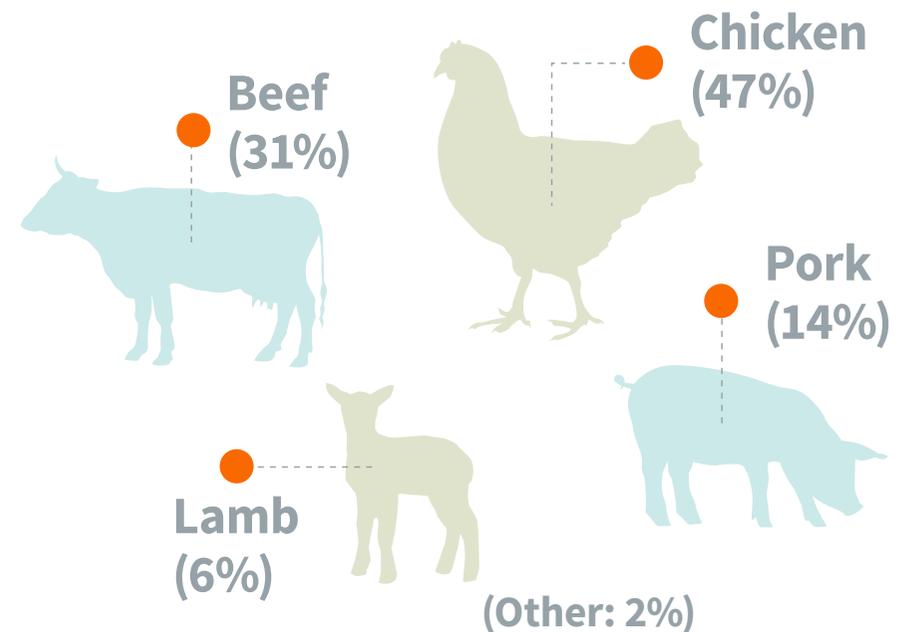


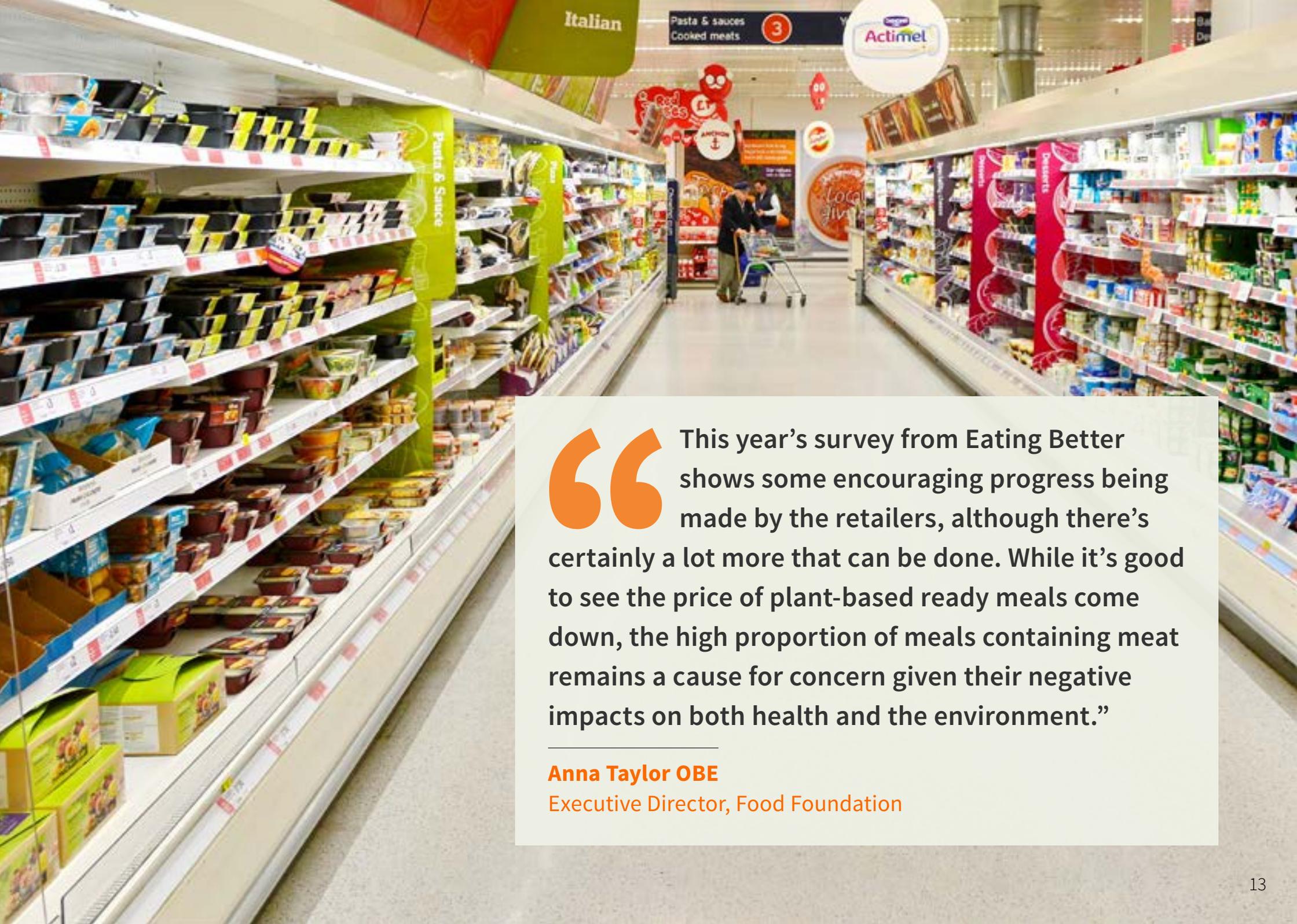
How many ready meals contain meat?

While ALDI, the Co-op and Tesco have significantly reduced their meat based ranges, Asda, Morrisons and Sainsbury's continue to have very meaty ranges. Iceland is still lagging behind heavily.



What is the most popular meat in meat meals?





“ This year’s survey from Eating Better shows some encouraging progress being made by the retailers, although there’s certainly a lot more that can be done. While it’s good to see the price of plant-based ready meals come down, the high proportion of meals containing meat remains a cause for concern given their negative impacts on both health and the environment.”

Anna Taylor OBE

Executive Director, Food Foundation

How we conducted our survey

Our sample

This year's snapshot survey looks at ready meals available to buy online in Tesco, Morrisons, Asda, Waitrose, Ocado, Co-Op, Iceland, Sainsbury's, ALDI and M&S in March 2021. Our sample contains 2743 ready meals. Where the same branded products were found in different retailers, we included all of them in total products for each retailer. When analysing the total data set from all retailers, branded products were only included once, yielding a sample of 2318 meals.

Our data comes 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. 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 uses big data techniques for collection, processing, storage and analysis of available products, making it a powerful tool to track and evaluate changes in the marketplace.⁹

What we cover

We included products available from the ready meal section of supermarkets, including both own-brand and branded meals, chilled and frozen options. We included both 'ready meals' and 'ready to cook foods', products designed to require no preparation beyond opening the package and heating or cooking according to the on-pack instructions. We only included main meals designed to be eaten hot. We used a broad definition of 'main' to include products that would feasibly either comprise a meal, or the main part of a meal. We excluded products classified as side dishes or snacks on the packaging or online shop. Where one supermarket classed a meal as a side or snack, e.g. a spring roll, we excluded equivalent products available in other supermarkets. We also excluded non-ready meals sometimes available in the 'ready meals' section of supermarkets, including pizzas, soups, cold salads, burger patties and sausages.

Product classification

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).

Price

We recorded meal prices and special offers, and analysed price per portion. Price per portion analysis excludes ready meals aimed at children.

***Notes for the 2021 survey:** Figures for Ocado include all ready meals (own-brand and branded) available to buy at the supermarket at the time of the survey. In September 2020, Ocado stopped selling Waitrose groceries and launched a delivery partnership with M&S. Therefore, our 2020 Ocado survey figures include Waitrose and Ocado own-brand meals, whilst our 2021 figures include M&S and Ocado own-brand meals. M&S groceries are currently only available to buy online through Ocado. Our 2021 M&S sample includes only M&S own-brand ready meals available to buy at Ocado. In previous surveys, Eating Better conducted fieldwork in store to supplement online data. Due to COVID restrictions, this was not possible in 2021, so this year's sample excludes Lidl, where online data was not available.

Who we are

About Eating Better

Eating Better is an alliance of 60+ civil society organisations, working to accelerate a 50% reduction in meat and dairy consumption by 2030 and to create an environment where healthy and sustainable diets are accessible and affordable to all. Eating Better inspires, informs, collaborates and showcases solutions. We work with producers, the food service industry, retailers and public sector catering to chart progress to eating less meat and dairy in favour of more plant-based meals for climate, nature, health, animal welfare and social justice. Together we can all eat better for people and planet.

Eating Better is a registered charity, number 1175669.

www.eating-better.org

This survey was prepared by Elena Salazar at Eating Better and Dr Richard Harrington at the Nuffield Department of Population Health, University of Oxford, using data from foodDB. The report was written by Elena Salazar, Carole Mitchell, Simon Billing and Jade Cox at Eating Better.

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Tracking Progress

Eating Better surveys retailers and high street chains on their offer of healthier and sustainable foods. Take a look at our **2020** and **2018** Ready Meals Surveys and our Sandwiches Unwrapped surveys in **2019**, **2016** and **2015**.

References

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