

The Product

- Range Breadth & Depth
- Does it offer choice
- Is it Healthy
- Has it got Innovation
- Has it got a Clear point of difference

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Range Vs. Performance

UK Lamb Ranges Sept 09				
	Sainsbury's	ASDA	TESCO	Waitrose
PRODUCT	No Lines	No Lines	No Lines	No Lines
Mince	2	2	1	2
Stewing	3	3	2	1
Shoulder Roasting	2	2	3	2
Leg Roasting	5	3	2	5
Frying Grilling	10	10	8	9
Added Value	2	3	3	4
Healthy	1	1	1	4
TOTAL	25	24	20	27

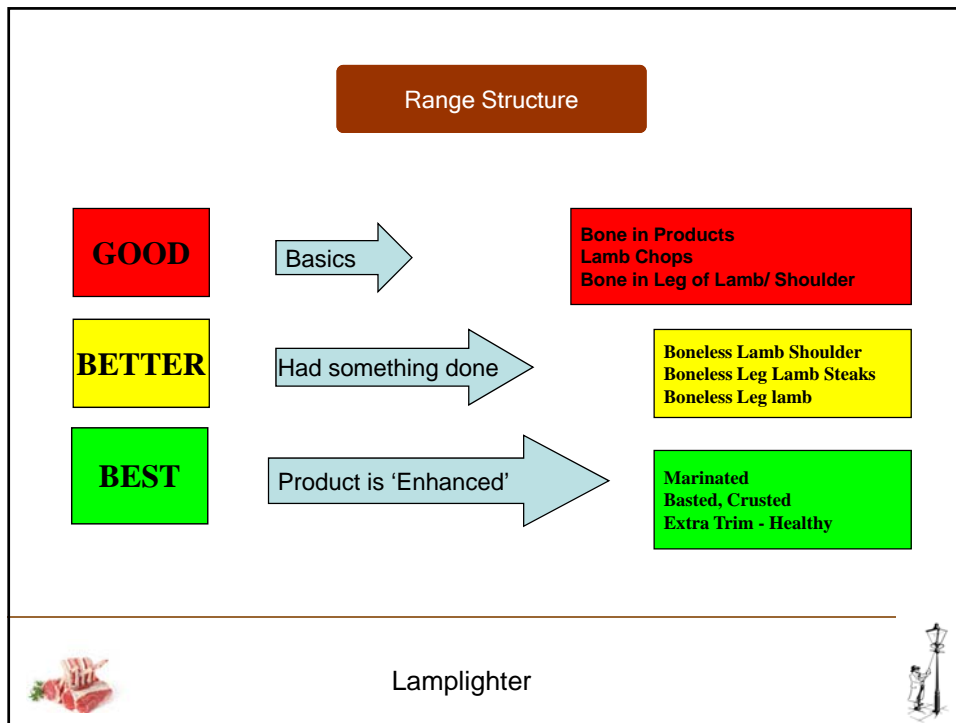
Waitrose
Most lines.. 27

Highest Share Growth 28%
Highest Over Trade 166%

FRESH LAMB RETAILER % SHARE 12 Week			
Value %	12 week to 12 July 2008	12 week to 12 July 2009	£ % Change
TOTAL MARKET	100	100	-6.3
Asda	10.2	11.8	9.8
Morrisons Group	8.5	9.5	4.8
Sainsbury's	19.8	19.3	-7.5
Co-op (inc. Somerfield)	9.5	8.3	-8.1
Tesco	24.1	24	-6.3
Waitrose	5.3	7.3	28.8
Other Multiples	0.2	0.6	148.4
Hard Discounters	0.4	0.4	-4.4
Butchers	16.4	15.3	-12.7

OVER / UNDERTRADE INDEX 12 Week to 2009			
Fresh Lamb Index: (>100 indicates overtrade)			
	vs Total Fresh Meat & Poultry Share	Fresh & Chilled	
Asda	99	84	
Morrisons Group	86	83	
Sainsbury's	113	118	
Co-op (inc. Somerfield)	168	319	
Tesco	93	78	
Waitrose	164	141	
All Other Multiples	208	228	
Hard Discounters	11	6	

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NPD and Innovation






- Hand Made
- Raw added value
- Healthy
- Stuffed & or Marinades
- Extra Matured






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Extra Tender lamb

Exclusive to Superquinn

The cuts undergo a revolutionary method of maturing which achieves an increased level of tenderness and flavour.....for those seeking that little bit more – extra tender, extra taste, extra special.

Evaluation carried out and concluded that day 10 optimum in terms of tenderness without adversely affecting product quality




Waitrose Lamb



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Waitrose			
Product Name	Wt	Each	ppkg
Mince			
Mince Lam 20% fat	0.500	£2.91	£5.82
Mince Lamb 10% fat	0.250	£2.49	£9.96
Stewing			
Lamb Ribs (Breast)			£4.99
Shoulder Roasting			
Whole Shoulder Lamb			£4.99
Neck Fillets			£11.29
Leg Roasting			
2 Leg Shanks			£8.49
Whole Leg Lamb			£8.49
1/2 leg lamb			£8.99
Diced Leg	0.450	£4.49	£9.98
Butterflied Leg			£11.49
Frying/ Grilling			
4 Shoulder Chops	0.450	£4.00	£8.89
8 Hand cut Rack Chops			£11.27
6 Hand cut Loin Chops (Spl)			£11.43
4 Hand cut Rack Chops			£14.29
4 Hand cut Loin Chops			£14.49
2 Hand cut Rack Chops			£14.49
2 Hand cut Loin Chops			£14.69
2 Leg Steaks			£13.99
4 Leg Steaks	0.400	£6.00	£15.00
Added Value			
12 Meat balls	0.432	£3.49	£8.08
Lamb Shoulder Chop Balsamic & Mint	0.400	£3.95	£9.88
Carvery Leg of Lamb Garlic & Rosemary			£10.99
4 Lamb Kofta	0.400	£4.99	£12.48
Healthy/ Extra Trim			
Extra Trim Whole Leg Lamb			£12.99
Extra Trim Boneless Leg Lamb			£13.99
Extra Trim Leg Steaks Lamb			£16.49
Extra Trim Rack Lamb			£24.99

Waitrose


- Range Focus
 - Roasting,
 - Healthy
 - Added Value
- Play on Skills
 - Hand Cut
 - Extra Trim
- Highest Share Growth 28%
- Highest Over Trade 166%
- Clear Concise Ranges
- Easy to shop

The Product

- Healthy
- Innovative
- A Clear point of difference



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Presentation & Packaging



- Attractive
- Hygienic
- Low Cost
- Re Cycle
- Simple & easy to Shop
- SRP
- Meets Legal Requirements







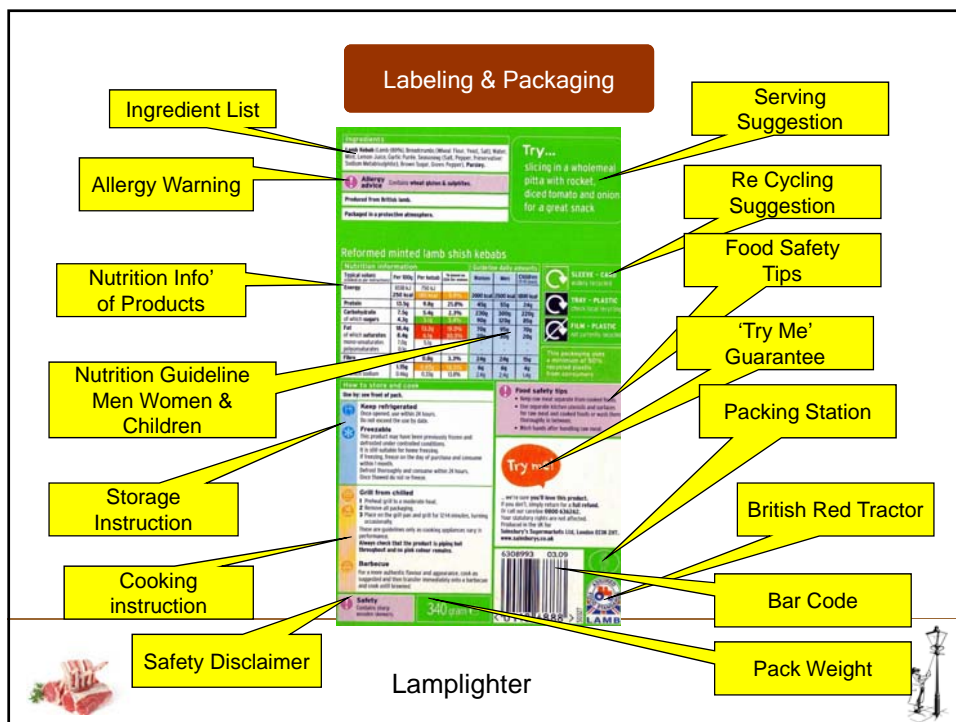
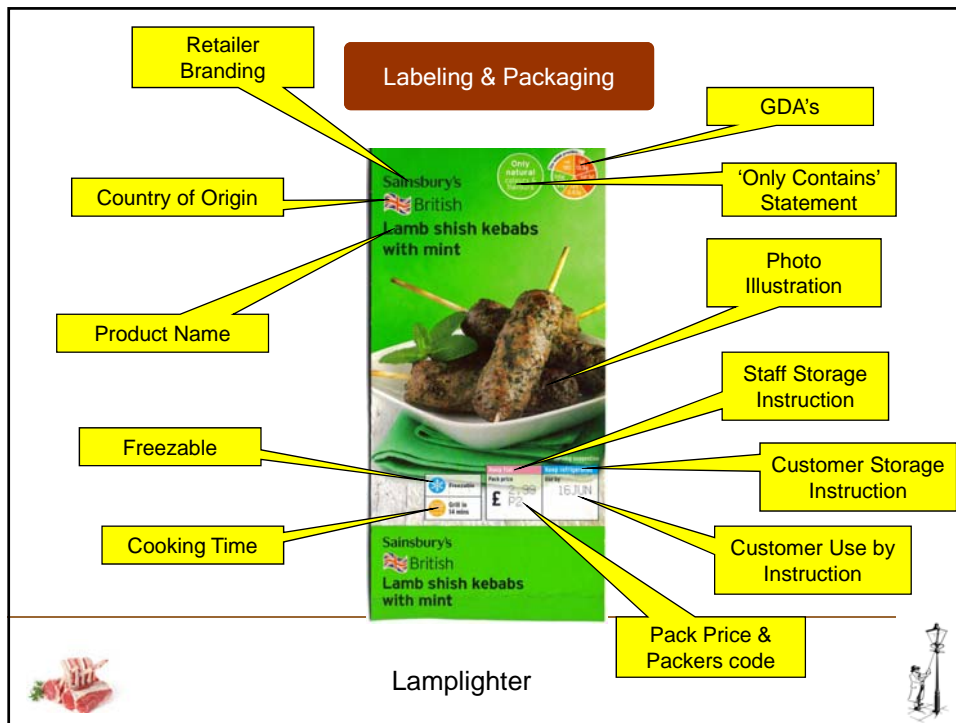









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Vac-cum Skin Packaging	CAP-MAP Packaging	Half or Full Sleeve Packaging
		
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Presentation Pre Pack
Share of SPACE




	
 <p data-bbox="699 1877 842 1910">Lamplighter</p> <p data-bbox="863 1805 1129 1921">Lamb Usually gets about 1to2 Meter's</p> 	

Presentation OTC Displays







Subtle POS

Colour-full BOLD POS



Price



- Easy to understand & Shop
- Must Offer Value & Be Competitive
- Must Give Focus & Excitement
- Customer & Colleagues Buy in!


Sainsbury's

Switch and **save**



875,000 baskets cheaper



1,273,000 baskets cheaper

Asda Tesco

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What is VALUE



£35,000,000.09



£0.09



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Pricing Hierarchy

Fixed Weight

UK Lamb Ranges Sept 09				
	Sainsbury's	ASDA	TESCO	Waitrose
Fixed Weight Options	11	12	10	8
Percent as Fixed Wts	44.0%	50.0%	50.0%	28.6%

Frying/ Grilling				
Product Name	Wt	Each	ppkg	
Lamb Chops (Smart Price) Shoulder Chops	0.400	E2.98	E7.45	
Lamb Chops			E9.96	
Lamb Chops. (3 for £10)	0.380	E4.00	E10.53	
3 Packs Lamb Chops. (3 for £10) Price Equivelent	1.140	E10.00	E8.77	
Lamb Steaks.	0.357	E3.80	E10.64	
Lamb Steaks (Chump/Rump)			E12.45	
Lamb Chops	0.270	E3.50	E12.96	
Lamb Chops Organic	0.424	E5.50	E12.97	
Lamb Chops Organic	0.330	E4.44	E13.45	
Organic Lamb Steaks			E14.95	

- Lamb Pricing
- 50% is now sold as Fixed Weight



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Competitive Pricing

UK Lamb Prices Sept 09												
Sainsbury's			ASDA			TESCO			Waitrose			
SAINSBURY			Asda			Tesco			Waitrose			
Product Name	Wt	Each	ppkg	Wt	Each	ppkg	Wt	Each	ppkg	Wt	Each	ppkg
Mince												
Mince 20% Fat	0.500	£2.89	£7.22	0.500	£2.88	£6.72	0.500	£1.49	£2.98	0.500	£2.81	£6.82
Mince Lamb 10% Fat										0.250	£9.29	£19.99
Mince Organic 18% Fat	0.400	£2.89	£7.15	0.400	£2.99	£7.40						
Stewing												
Stew of Lamb (Basics)			£4.18			£3.98						£4.99
Stew Lamb	0.400	£4.00	£10.00	0.297	£4.29	£14.41	0.347	£4.00	£11.53	0.450	£4.45	£19.99
Stew Lamb (Be Good to Yourself)	0.315	£4.00	£14.25			£3.00	0.400	£2.65	£6.63			
Shoulder Roasting												
1/2 Shoulder Lamb			4.98			£4.98			£4.98			£4.99
Whole Shoulder Lamb			7.34			£4.98			£4.98			£4.99
Lamb Shoulder Boneless												£8.30
Leg Roasting												
Whole Leg of Lamb			£7.99			£5.87			7.99			£8.49
1/2 Leg Lamb			£7.99			£5.87			£6.00			£8.99
Lamb Roasts						£7.25						£8.95
Boneless Leg						£10.99						
Butterflied Leg			£10.99									£11.49
Frying/Grilling												
Lamb Chops (Basics)	0.445	£4.00	£8.99	0.400	£2.98	£7.40			8.99	0.500	£4.00	£8.99
Lamb Steaks X 2			£12.99			£9.99	0.221	£2.99	£12.94			£14.49
Lamb Chops	0.500	£5.00	£10.00	0.270	£3.50	£12.85	0.424	£5.50	£12.87			£14.49
Lamb Chops						£5.50			£12.90			£14.49
Lamb Chops						£5.50			£12.90			£14.49
Lamb Chops						£5.50			£12.90			£14.49
Lamb Chops						£5.50			£12.90			£14.49
Lamb Chops						£5.50			£12.90			£14.49
Lamb Chops Organic						£11.99			£14.99			£17.49
Lamb Leg Steaks						£12.45	0.325	£4.44	£12.45			£14.49
Lamb Leg Steaks (Be Good to Yourself)	0.322	£4.50	£12.58			£12.45	0.321	£4.00	£12.45	0.400	£6.00	£14.00
Lamb Rump Steaks						£12.45			£10.60			£13.99
Neck Fillets						£10.60			£10.60			£11.25
Healthy Extra Trim												
Extra Trim Whole Leg Lamb												£12.99
Extra Trim Boneless Leg Lamb												£13.99
Extra Trim Leg Steaks Lamb	0.322	£4.50	£12.58				14.87			£13.98		£16.49
Extra Trim Rack Lamb												£24.99

Yellow Boxes
=
Cheapest on Display



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Competitive Pricing Vs. Other Meat



Lamb Steaks
321gm
£3.59 Pack

Pork
Loin Steaks 440g
£4.00 Pack



Lamb Chops
424gm
£5.50 Pack

Beef Rump
Steaks 600g
£4.61 Pack



1/2 Leg Lamb 1.4kg
£8.40 Pack








Chicken 1.5Kg
£4.00 Each




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Competitive Pricing Vs. Other Products

FRESH FISH	Pizza	Rice
		
Pasta	Pies	Fruit
		
		Cheese
		



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Promotional



- Permanent
 - Roll Backs
- Adds Excitement & Fun
 - for Staff & Customers
- Competitive
 - Vs Others & Other Products
- Shows Value















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Promotion





Waitrose Meat, Poultry & Fish


Only '3 for £10' stickered packs

£10 for 3 99p


Applicable for orders collected between 07.00-20.00

BUY 3 FOR £10


Waitrose			
Product Name	Wt	Each	ppkg
3 For £10			
8 Beef Burgers	0.908	£4.00	£4.41
Lean Ground Beef	1.100	£4.00	£3.64
Lamb Shoulder Chops	0.450	£4.00	£8.89
Pork Jumbo Sausage	0.896	£4.00	£4.46
Ranch Steak (Topside)	0.356	£4.00	£11.24
Pork Shoulder Steak	0.800	£4.00	£5.00
Easy Pork Steak	0.383	£4.00	£10.44





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Promotion




ASDA			
Product Name	Wt	Each	ppkg
BBQ			
2 For £5.00			
2 Beef and Monterey Jack burger	0.454	£3.00	£6.61
2 Beef Burgers & Vintage cheddar	0.454	£3.00	£6.61
2 Lamb & Redcurrent Burgers	0.310	£3.00	£9.68
2 Scotch Burgers	0.454	£3.00	£6.61
2'S Meat balls	0.400	£2.50	£6.25
2 Extra Special Tomato Burger	0.454	£3.00	£6.61
Pepper Beef Steak	0.300	£3.00	£10.00
Spicy Beef Meat Ball Skewers	0.400	£3.00	£7.50
4 Minced Lamb shish kebabs	0.240	£2.00	£8.33
4 Hot n Spicy Beef Shish Kebabs	0.240	£2.00	£8.33
2 For £6.00			
Chinese pork Shoulder Chops	0.8	3.48	£5.80
Sweet Chill Pork Steaks	0.417	3.48	£8.33
Pork Loin Steaks	0.417	3.48	£8.33
Pork Loin Steaks garlic butter	0.348	3.48	£10.00
3 For £7.00			
Spicy Meat Ball Skewers	0.4	£3.00	£7.50
Chili Rump Steaks	0.24	£3.00	£12.50
Minced Lamb Steaks	0.24	£3.00	£12.50
3 For £10.00			
10 X 3oz Beef Burgers	£0.85	£4.00	£4.70









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Promotion



BBQ Event
Great Offers!





WISE BUYERS
M&S QUALITY GUARANTEED

quality worth every penny





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Promotion EVENTS





GUINNESS WORLD RECORDS

CERTIFICATE

The longest sausage measured a world record 59.14 km (36.75 miles) and was made by J.J. Tranfield on behalf of Asda Stores Plc, at Sheffield, South Yorkshire, UK on 27-29 October 2000

J.J. Tranfield



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People

- Skill-full
- Knowledgeable
- Salesmen
- Closest to the Customer








- People
 - The Most Important element
 - We are a CRAFT Industry
 - We Must Support & continually train them
 - We MUST Treat them with respect
- They hold our Future in their Hands





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CRAFT Butchers Shops



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CRAFT Butchers Shops



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Training CRAFT Butchers



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Irish Lamb Side Loin/ Chump Chops with Garlic Butter & Rosemary

Ingredients	1 Unit	
	Supplier	Gm.
1 Fresh Lamb Chump / Side loin	ICM	320 to 400
1 Pellets Garlic Butter	Ocean Path	1g
1 Sprig of Fresh Rosemary	Own	
Foil Tray Size		D279-34

Finish Product Detail	OTC	Pre Pack
PLU Number		
This Recipe Makes		1-2 packs
Cooking Time Approximate		25-30 Minutes
Feeds		1-2



A Take Side loin from Bag Dry Off Primal
DO NOT TRIM The PRIMAL



B Cut into Slices 15 to 25 mm Thick To Maximise the Yield



C Take care with end to make sure last slice is of a saleable size. Insert 2 'Cuts' into each steak



D Cut Butter Pellet in Half Place into 'Cuts' Lay Sprig of Rosemary on Product



E Place 2 steaks into D 279-34 foil Tray



F Overwrap and Weigh Price the Finished Product

Boneless Center Loin Lamb with garlic and rosemary stuffing

Ingredients	1 Unit	
	Supplier	Gm.
1 Center loin of Lamb	ICM	750-1000gm
Garlic and rosemary Stuffing	TS Foods	160gm
Sprig of Rosemary	Own	
Foil Tray	D 233-79	

Finish Product Detail	OTC	Pre Pack
PLU Number		
This Recipe Makes		1 Joint
Cooking Time Approximate		50-60 Minutes
Feeds		4-5



A Take Primal out of Bag * Dry Off Primal



B Lay Center Loin Fat Down on Block and weigh up 160Gm of Garlic & Rosemary stuffing



C Place Stuffing Mix onto the Center Loin as shown



D Form the centre loin and Stuffing into a roll and secure with the Red Elasticated Ties about 100mm apart



E Place roll into Foil tray and add a sprig of Rosemary



F Overwrap and Weigh Price the Finished Product

Lishmans
CRAFT Butchers Shops



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Booths
CRAFT Butchers Shops



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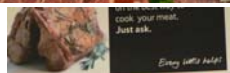
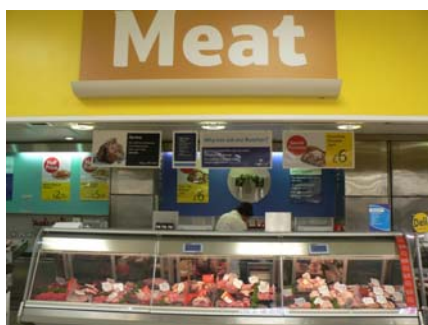
Waitrose
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Tesco
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Morrison's
CRAFT Butchers Shops



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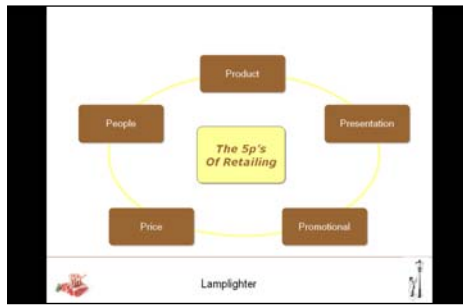


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Thank You

The 5 P's



Can make you into a..



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