



Hybu Cig Cymru
Meat Promotion Wales

PGI Welsh Lamb – a quality, sustainable brand



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In 2003, Welsh Lamb was awarded the coveted PGI (Protected Geographical Indication) status by the European Union. This designation placed Welsh Lamb alongside similar iconic brands such as champagne and parma ham, and has acted as the cornerstone of marketing efforts in both the domestic and export markets ever since.

The same year, Hybu Cig Cymru – Meat Promotion Wales (HCC) was formed, as the devolved statutory body responsible for the promotion and development of the lamb, beef and pork sectors in Wales.

For the next 18 years, HCC spent the bulk of its core Red Meat Levy funding – sometimes augmented by grant income from the EU, the Welsh Government or other sources – on marketing, promotion and building awareness of the brands. This involved promotion directly to the consumer through media campaigns, collaboration with retailers and foodservice companies on marketing, a presence at food fairs and other consumer events, alongside PR and communications work.

The aim of this promotional effort was to ensure the best value for levy-payers – farmers and processors – and wider stakeholders by establishing the Welsh red meat brands as premium products, able to command loyalty from consumers, to deliver consistent returns to the whole supply chain.

The key brand attributes have been consistent over the years, albeit with differences of emphasis to respond to changing consumer tastes.

1. **Quality.** Rather than joining a ‘race to the bottom’ on price, the core strategy has involved promoting the quality of Welsh produce to consumers who are willing to pay a little more for a top taste experience.
2. **Farming practices.** HCC has emphasised the non-intensive ways that livestock is farmed in Wales, combining traditional practices going back centuries on family farms with new innovations, and standards of animal welfare which are among the best in the world.
3. **The environment.** Wales has a landscape and climate which is ideally suited to rearing quality lamb and beef, and doing so sustainably using natural resources which are abundant – grass and rain.
4. **Nutrition and versatility.** Demonstrating that Welsh red meat is part of a healthy nutritious diet, and can suit a wide range of meal choices, has been a consistent thread.

Supporting these key attributes, the integrity of the Welsh Lamb and Welsh Beef supply chains have been paramount. The food is traceable from farm to fork, through a rigorous audit system linked to the PGI certification, and more recently through forensic-level technology which enables the testing of the meat at any stage and verifying its origin in Wales.¹

¹ Welsh Lamb has benefited from this additional layer of scientific verification since 2018 and Welsh Beef since 2021. The award-winning technology analyses the trace elements and isotopes naturally absorbed through the environment to assess whether the meat matches a distinctively Welsh ‘fingerprint’ of origin. More information is available here: <https://meatpromotion.wales/en/about/what-we-do/pgi-certification/world-first-for-welsh-lamb-through-origin-fingerprint-technology>



Measuring progress

Now, branded PGI Welsh Lamb is sold throughout the UK by a majority of the country's multiple retailers. It is also widely recognised in the foodservice sector and is served in some of Britain's most prestigious hotels and restaurants.

It is also sold in over twenty countries worldwide, finding its place on the menus of some of the finest restaurants in Europe, North America, the Middle East and Asia, and spearheading a Welsh red meat export trade of £200m a year.

The food and farming sector faces changing times, emerging from the turbulence of the COVID pandemic, and a future after Brexit. It is also a period when the environment and sustainability is set to remain high on the public agenda, with people's dietary choices part of the debate over how to mitigate climate change.

With this in mind, HCC has commissioned in-depth research on UK consumers' perceptions of the Welsh Lamb brand.

The research asked a broad range of questions to consumers who were buyers of lamb, comparing their attitudes towards PGI Welsh Lamb with those towards lamb labelled as British, and lamb from other countries including New Zealand.

The survey was conducted by the MRQual research agency and included 1000 people aged 18-75, with most (90%) living in England. Interviews were held in the spring of 2021.



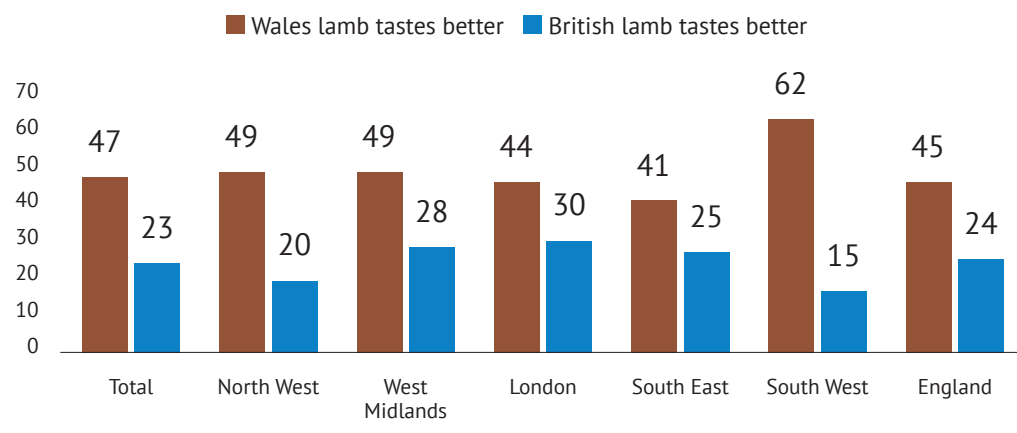


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Quality

After 18 years of co-ordinated promotion of PGI Welsh Lamb, consumers across the UK think of it as a positive, high quality brand. It is recognised as distinctive and superior to lamb produced in the rest of Britain.

Crucially, a large number of survey respondents identified strongly with the brand on a personal level, believing that Welsh Lamb tastes better than British lamb. Fully 47% agreed with this statement, with only 23% favouring British. This attitude can be seen to varying degrees in all regions of England.



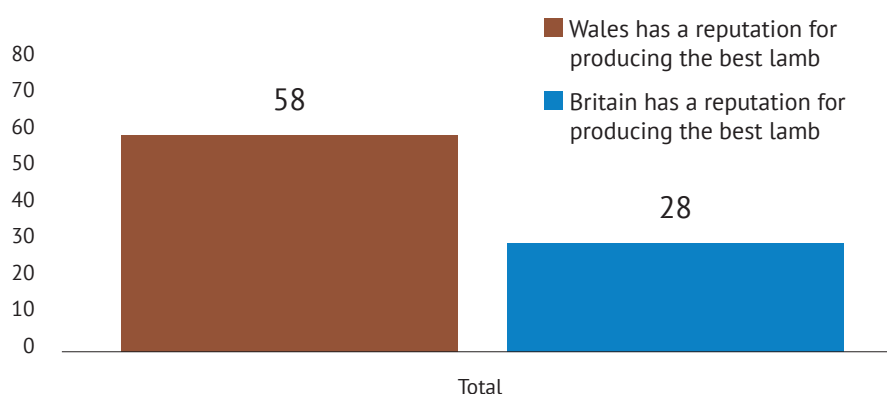
The columns show percentages. Each pair of bars adds to less than 100% because a small number of respondents answered "Neither".



Linked to this finding, 45% said Welsh Lamb was their favourite to eat, as opposed to just 30% for lamb labelled as British.

The results were also very positive for perceptions of the Welsh Lamb brand more widely.

58% of consumers throughout Britain, and 56% in England, thought that Wales had the best reputation for producing lamb – double the figures for British lamb



The columns show percentages. The bars add to less than 100% because a small number of respondents answered "Neither".

Wales also scored highly when respondents were asked what lamb the best restaurants would serve, with 56% answering Welsh Lamb.

Given the positive association of the brand with quality, it is therefore not surprising that over a third (36%) of consumers said they would be willing to pay a bit more for Welsh Lamb.



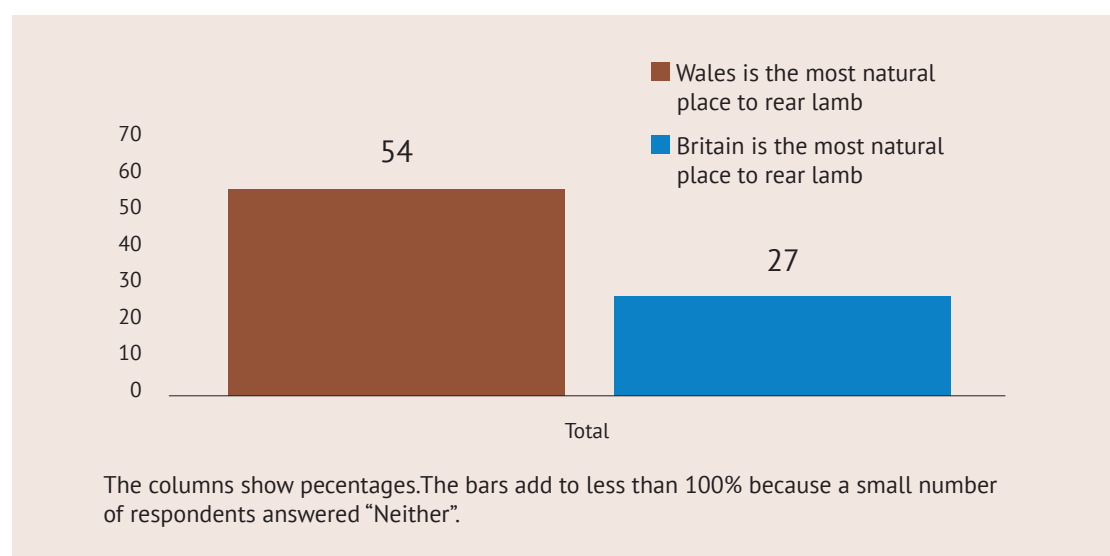
Sustainable farming methods

As well as its perceived quality, Welsh Lamb scores highly with British consumers because of its positive association with sustainable, natural and low-intensity methods of production.

This is an increasingly important factor in the marketplace. A 2020 survey found that British consumers would be willing to pay around 12% more for sustainably-sourced food, whereas international research by YouGov in 2021 found that people in the UK were among the most likely to pay more for environmentally-friendly goods.²

A series of questions in HCC's survey of British consumers show that Welsh Lamb scores much more highly than other brands and countries of origin in terms of its sustainability.

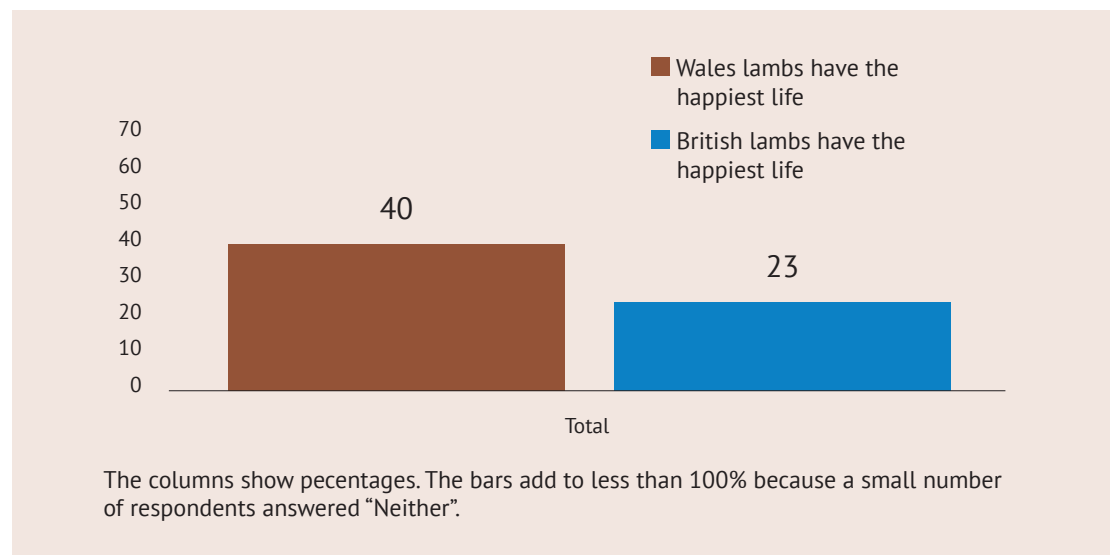
Twice as many consumers said that Wales was the most natural place to rear lamb as opposed to those that said that Britain was the most natural place.



² <https://www.independent.co.uk/news/uk/home-news/lockdown-eco-friendly-buying-products-uk-a9629861.html>

In exploring the attitudes which underlined this positive perception, it was found that respondents' ideas about farming methods in Wales were significant.

64% said that they believed that Welsh Lamb was produced on small family farms (as opposed to 43% for British lamb), and Wales scored almost twice as well as Britain as a whole when consumers were asked whether the lambs had lived a happy life.



Most survey respondents were able to identify one of the key features of sheep farming in Wales, namely its non-intensive methods of production whereby animals are kept outside and reared on pasture.

A large majority of consumers (81%) were able to correctly identify that lambs reared in Wales were overwhelmingly fed on grass, while 75% - as opposed to 67% for British lamb - believed that lambs were able to roam freely.

The perception of Welsh Lamb as being 'natural' is part of a wider set of positive associations about Wales in the minds of British consumers, albeit they seem to be more powerfully associated with the Welsh Lamb brand than with food in general. Research on behalf of the Welsh Government, published in 2017, found that more people (42%) associated Wales with natural food and drink than Britain (33%).³

³ Welsh Government, *Value of Welshness. Shopper Desire for Welsh Products* (2017)

Conclusion

Promotion of the Welsh Lamb brand based on its key attributes of quality and taste, confidence in the methods of farming and the integrity of the supply chain, and its association with natural production, mean that it is well-placed for the future.

Sustained investment in marketing over the past 18 years has reinforced positive perceptions of the product in the minds of consumers throughout Britain.

Most significantly, the strong link between Welsh Lamb and sustainability mean that the Welsh sheep farming sector can feel confident in facing a future where climate change is an increasingly important consideration in the minds of consumers.

The Welsh Lamb brand and Welsh sheep farming are respected and trusted by the British public. Continued investment in sustaining the positive perception of Welsh Lamb is vital to a prosperous future for the country's agriculture and the communities which are sustained by it.



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