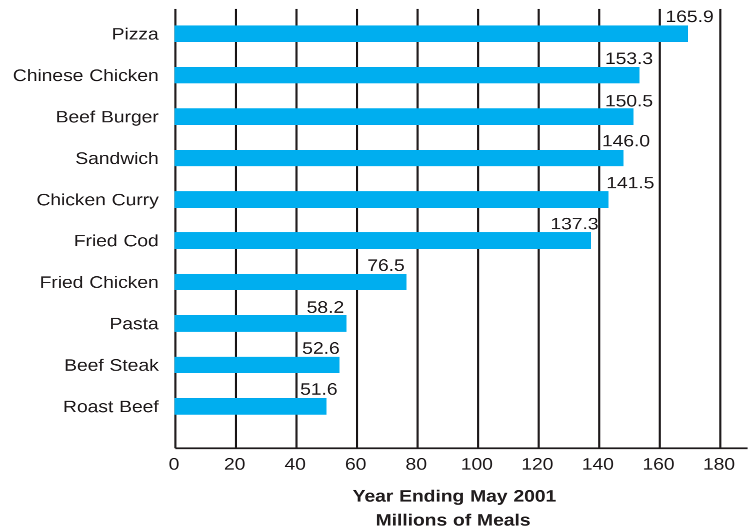
OUT OF HOME FAST FOOD

Each year over 165m pizza meals and 150m beef burger meals are eaten out of home. Sandwiches account for 146m meals, fried cod for 137m and pasta for 58m.

Favourite out of home meals



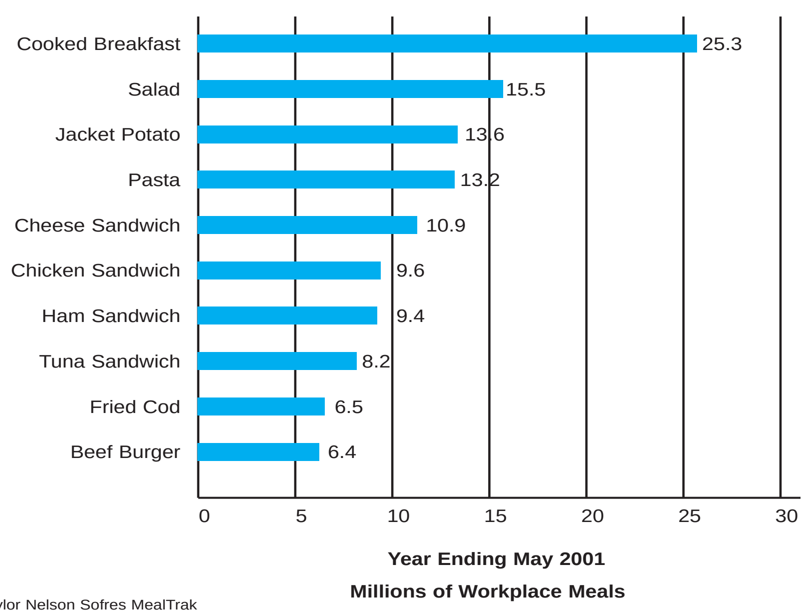
Taylor Nelson Sofres MealTrak

Beefburgers are served in burger houses, steak houses and pubs, pizza places, sports & leisure clubs, Chinese takeaways and many other outlets such as fish and chip shops and hotels.

Burgers are more likely to be eaten by males than females and by younger rather than older people. Of all the burger/grills eaten at home 54% are consumed by males and where burger/grills are eaten out of the home 56% are consumed by males. (TNS MealTrak 2001).

Beef burgers are a popular choice of meal at work but a cooked breakfast, jacket potato or sandwich are even more popular.

Top Workplace Meals



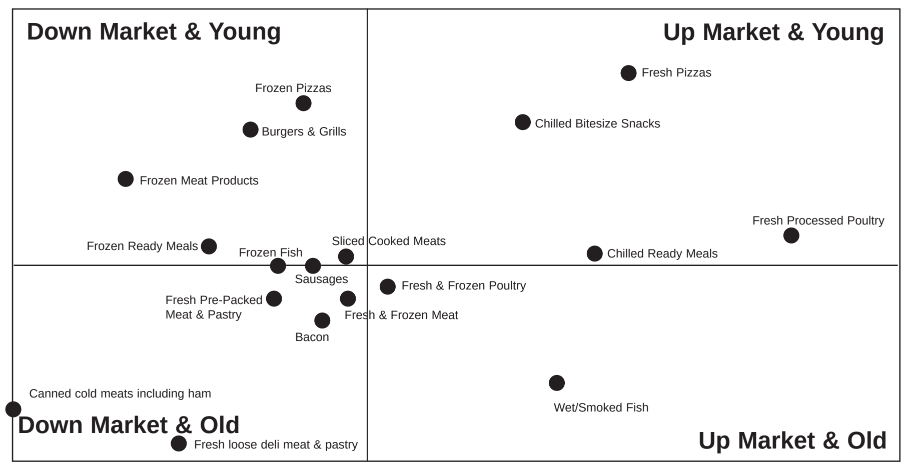
Taylor Nelson Sofres MealTrak

Burgers at Home

In the home there are almost 300 million servings of burgers and grills a year with more being eaten in the summer and autumn than in winter and spring. Bread and rolls are the most common accompaniment but burgers and grills are also served with chips, fresh potatoes and vegetables. (TNS Family Food Panel)

The demographic map below shows the buyer profile of a variety of foods including burgers.

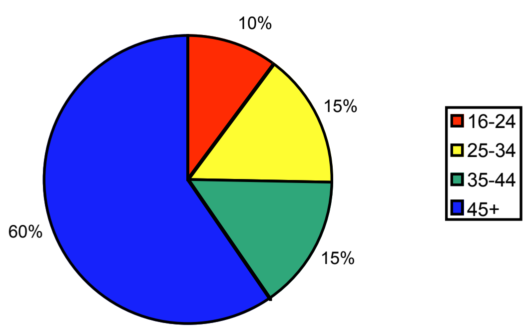
Buyer Profile of Main Shoppers - Aged under 45 and from Social Groups ABC1



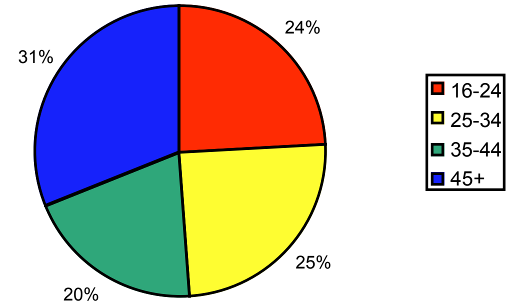
Source: Taylor Nelson Sofres Superpanel
52 w/e March 2001

The Burger Market

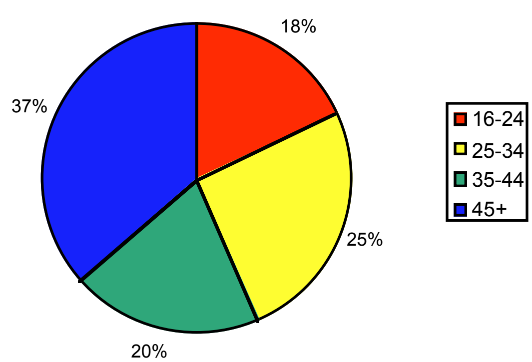
Total meat meals eaten at home broken down by age



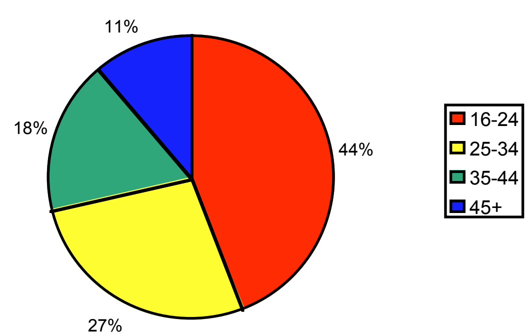
Total meat meals eaten out of the home broken down by age



Total burger/grills meals eaten at home by age



Consumption of burger/grills out of the home by age



Taylor Nelson Sofres MealTrak. Year Ending May 2001

Retail purchases account for 60% of the frozen burger market, 14% of fresh burgers, 3% of fresh grill products and 23% of frozen grill products.

Taylor Nelson Sofres Superpanel

Comparison of Nutrient Values of burgers:

	Protein gm	Fat gm	Energy kcal cal	Energy kJ kJ	Iron mgm
Beefburgers(per 100.0gm)					
Homemade grilled	24.9	20.4	287	1,194	1.90
Homemade fried	23.8	22.7	303	1,261	1.90
Homemade grilled with a bun	21.9	17.4	283	1,183	2.00
Homemade fried with a bun	21.0	19.3	297	1,238	1.90
Chilled/frozen grilled	26.5	24.4	326	1,355	2.50
Chilled/frozen fried	28.5	23.9	329	1,370	2.80
Chilled/frozen raw	17.1	24.7	291	1,206	1.70
Low fat, chilled/frozen, grilled	22.7	9.5	178	745	3.40
Low fat, chilled/frozen, fried	23.6	10.8	193	807	3.60
Low fat, chilled/frozen, raw	17.9	9.5	158	659	2.70
Economy, frozen, grilled	15.8	19.3	273	1,138	2.50
Economy, frozen, raw	13.7	21.2	261	1,081	2.10

Nutrient values of raw mince

Beef, mince, raw	19.7	16.2	225	934	1.40
Beef, mince, extra lean, raw	21.9	9.6	174	728	1.50
Pork, mince, raw	19.2	9.7	164	685	0.90
Lamb, mince, raw	19.1	13.3	196	817	1.60

McCance & Widdowson. Composition of Food, MAFF & Royal Society of Chemistry

UK MEAT INDUSTRY DATA

PER CAPITA CONSUMPTION OF MEAT IN THE UNITED KINGDOM (KG)

	1995	1996	1997	1998	1999	2000	2001
Beef & veal	15.4	12.6	14.4	15.0	15.4	16.0	15.3
Mutton & lamb	6.0	6.2	5.9	6.5	6.4	6.5	5.9
Pork	12.8	13.3	14.0	14.3	13.8	13.3	13.0
Bacon	8.0	8.0	7.8	8.0	7.9	7.7	7.6
Poultrymeat	25.3	26.9	26.4	27.8	28.5	28.6	28.7
Total meat	67.4	67.1	68.7	71.6	72.0	72.1	70.5

Source: MLC, Planning & Forecasting Group, October 2001

These figures are based on estimated supplies of each meat on a carcase weight basis, divided by the mid year population figure for the UK. This includes retail sales, processed meat sales and sales of each meat in the foodservice sector. The figures exclude imports of processed meat products such as corned beef, pates etc.