CONSUMER INSIGHTS

September 2019

TRUST, TRANSPARENCY AND TRACEABILITY IN AGRICULTURE: THE CONSUMER PERSPECTIVE

British agriculture is critical to the security and well-being of the nation, with 50%[1] of what we eat as Britons being produced here. The UK operates to some of the highest standards in the world, with assurance schemes, such as Red Tractor, in place to guarantee our farmers and growers produce traceable and safe food which is farmed with care. However, despite our reliance on farming, agriculture as a sector, and the global food system as a whole, is being scrutinised more than ever before. This heightened attention has come under a number of guises that can broadly be grouped under concerns around environment, animal welfare and health (including food safety and human health).

The government has pledged to review the food system post-Brexit to ensure 'everyone has access to high-quality British food', regardless of where they live or how much they earn, as well as to help protect the environment for future generations.

Consumer views and opinions are both complex and contradictory. For example, according to Edelman's Trust Barometer 2019, globally, more people are engaged with news and current affairs than last year, but there is profound distrust in politics and in information itself amongst the population.

1. Source: Defra, 2017

It is against this backdrop that AHDB asked a range of questions:

- How do British people feel about where their food comes from?
- To what extent do they trust the food system?
- How can our industry deepen that trust in the future?

KEY FINDINGS

- **Consumer trust is a precious commodity**
- **Farmers enjoy trust but face greater challenges in the future**
- **Agriculture has the challenge of meeting a diverse range of needs and expectations for consumers**
- **Challenges arise from consumer concerns around environmental and animal welfare pressures**
- **To maintain trust, agriculture must review and sometimes adapt its practices to demonstrate where its values are shared with society's**
- **There is consumer demand for greater transparency in certain areas, which could be communicated through clear on-pack labelling**
- **Retailers should continue to demonstrate to consumers how they maintain standards throughout the supply chain, as some consumers see traceability as their responsibility**

Research background

AHDB conducted a study with Blue Marble, a consumer research organisation, interviewing 1,500 consumers about their opinions and attitudes towards food and farming. We also followed up with a qualitative online bulletin board and focus group to explore these themes in more depth.

This report discusses these important issues and is aimed at influencers and policymakers in agriculture – organisations such as the farming unions, Government, industry bodies and the trade press. The report also includes wider data sources to add further context to how these issues link into consumers' shopping behaviour. For example, it is worth remembering that price, quality and convenience are the key drivers of food choice for many consumers. How trust, transparency and traceability integrate will be increasingly critical.

The report will explore how engaged consumers are with food production issues, which elements of the food system are most trusted, how demonstrating shared values can boost trust, where consumers get their information from and will look at potential barriers to trust in the future. It will conclude by looking at mechanisms the industry can use to deepen trust and what the future holds.

Context

Most people in the UK live in a heavily urbanised or suburban environment. Only 17% live in areas defined as rural (Defra). Because of this the majority of consumers in the UK are divorced from the means of food production and have limited knowledge about agriculture. However, given high levels of media and pressure-group attention to the subject, many feel well informed and have definite opinions on farming.

We live in an age of readily accessible information about pretty much everything and consumers are increasingly demanding better knowledge about where their food comes from and how it is produced.

HOW DO CONSUMERS VIEW THE FOOD SUPPLY CHAIN?

Interest and engagement in food production issues

It is human nature to be interested in the food we eat and, in recent years, issues such as provenance, welfare and sustainability have become hot topics. However, food safety concerns become top of mind during events such as the horsemeat scandal. Currently, the conversation has shifted more towards concerns around animal welfare and the environmental footprint of the food we eat.

Younger people in particular claim to have more interest and knowledge of farming and food production than older generations.

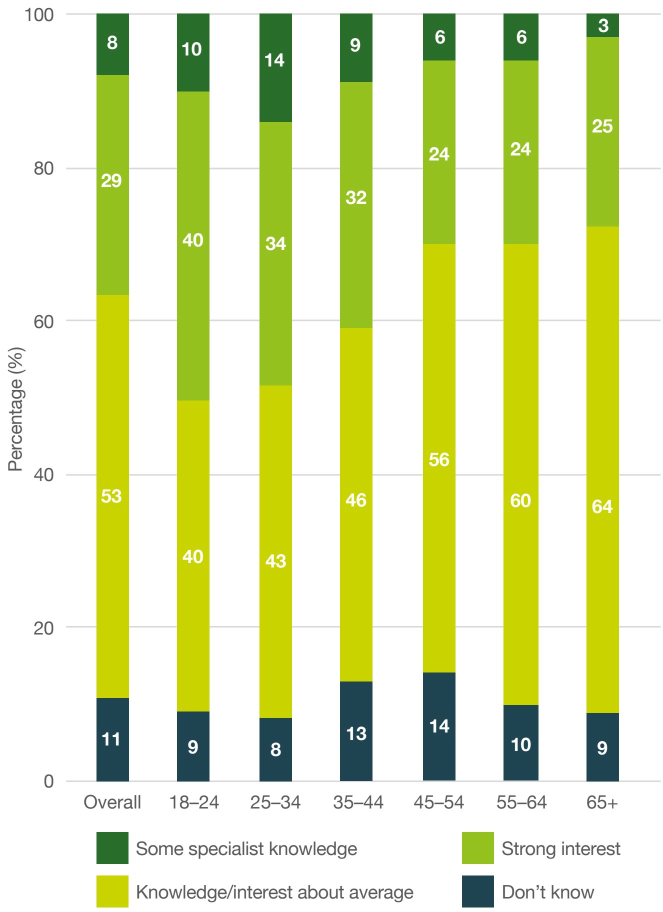


Figure 1. Level of knowledge on farming and food production

Source: AHDB/Blue Marble

(Q – Thinking about food and your experience of food, please can you tell me which of the following statements you most agree with? Regarding farming and food production … Base: All respondents (1,500))

Some consumers are more focused on putting food on the table, where price is the biggest area of concern. There is a relationship between increased affluence, and engagement with food production issues such as health and environment. We found that there are some consumers who can afford to scrutinise their choices more closely, with the result that, as disposable income grows, more consumers are able to make choices on these issues.

Which parts of the supply chain are most trusted?

Looking at the food supply chain as a whole creates some interesting variance in where trust lies. Influenced by the current political environment, consumers have the least trust in government agencies of all groups engaged in the food system that we asked about (see below). Retailers and food processors have reasonable levels of trust – around half of consumers agree that supermarkets are trustworthy and 41% trust food processors – but by far the most trusted group is farmers. Our research shows that 71% of consumers agree that farmers are trustworthy, only 6% disagree with that sentiment.

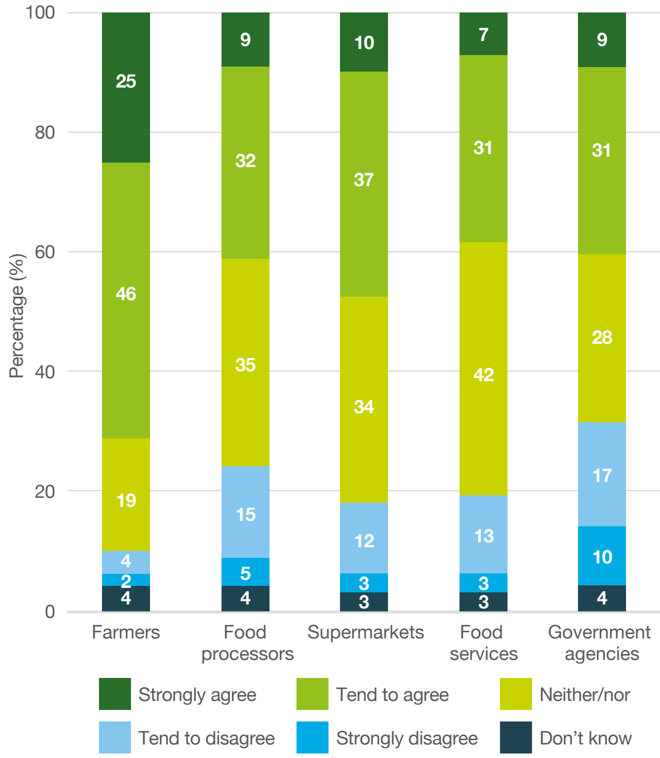


Figure 2. Level of trust in elements of the food system

Source: AHDB/Blue Marble

(Q – Thinking about all elements of the food system, how much would you agree or disagree with the following statements about each group on a scale of 1–5, where 1 is strongly disagree and 5 is strongly agree? – A trustworthy group. Base: All respondents (1,500))

This results in an overall good impression of British agriculture – 62% feel positive, while only 5% actively feel negative about agriculture, with the remainder feeling neutral. This varies to some extent by sector: non-livestock sectors such as cereals and horticulture are viewed more positively, followed by dairy. The least positivity is felt towards poultry farming, where notions of "factory farming" are more prevalent. Even here, though, 54% of people feel positive. This does highlight the contradictions in shoppers – chicken production is the least well regarded according to this research, yet chicken itself is the most widely consumed protein with the highest growth rates. This shows that other factors weigh heavily on the purchasing decisions of consumers, such as convenience, versatility, nutrition and cost.

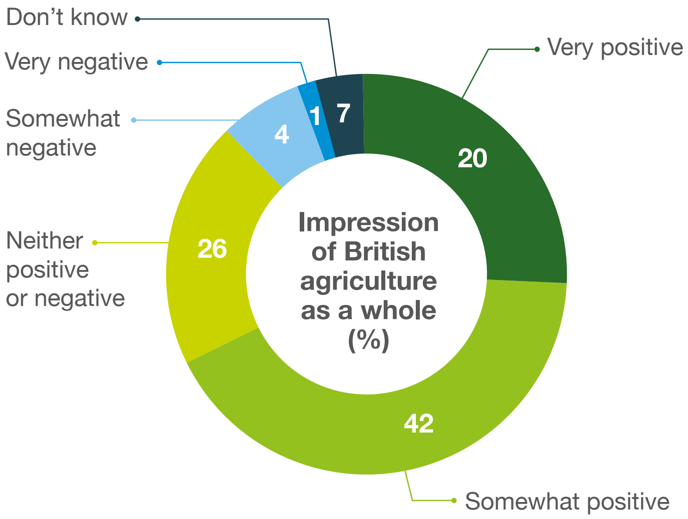


Figure 3. Impression on British agriculture as a whole

Source: AHDB/Blue Marble

(Q – Please indicate your overall impression of the following …
Base: All respondents (1,500))

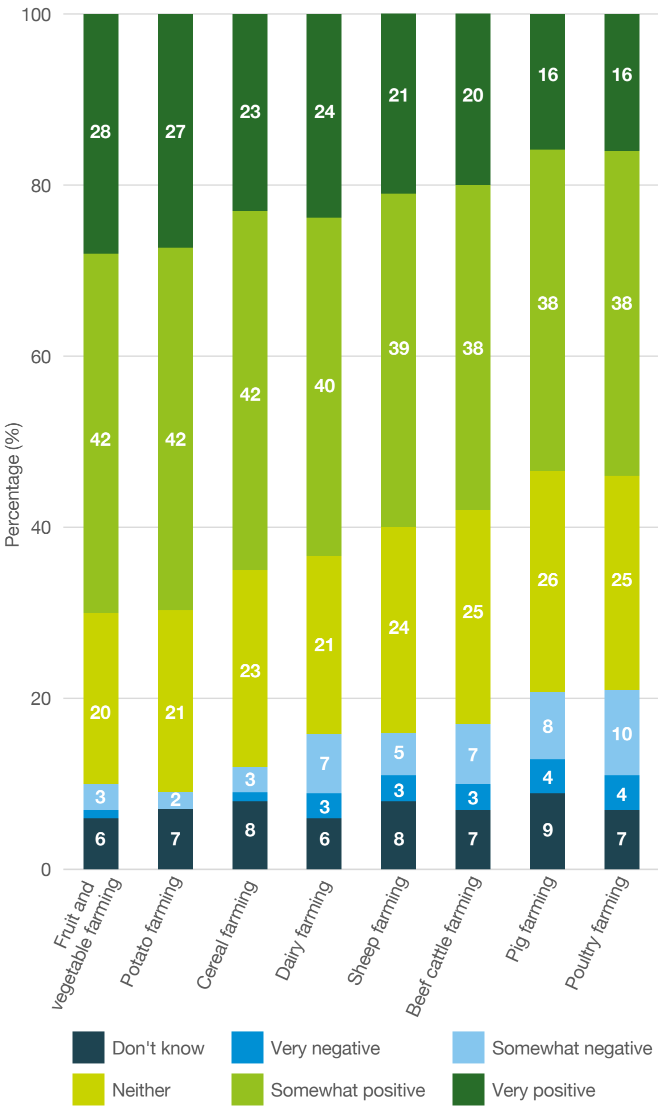


Figure 4. Impressions of different sectors in British agriculture

Source: AHDB/Blue Marble

(Q – Please indicate your overall impression of the following …
Base: All respondents (1,500))

However, there are challenges ahead. Consumers do highlight some areas of concern, with climate change and the humane treatment of farm animals ranking among the most pressing, with more than a third of consumers saying they are very concerned about both these issues. We will explore these areas later in the report.

Shared values

It is important to explore where this positivity towards agriculture emanates from so we can boost this further in the future. Our research probed values across the supply chain. Farmers are respected for their expertise, because they care about animals, people and the environment. Consumers also feel that farmers deliver on their promises. However, an area where farmers are underperforming is "communicating to consumers", which is where supermarkets have an obvious a dvantage, with ready access to shoppers. Therefore, there is a real opportunity for farmers to use their trusted reputation to effectively communicate industry messages to consumers.

> "I feel the farmers have the expertise and level of knowledge required to inform people about the food system. Their own interests are less likely to shadow their influence due to them being more caring for the wider environment and their animals"
>
> **Male, 19, C1, Semi-rural, Notts/Derby**

It is interesting that the positive attributes farmers are perceived to have align most with current societal values, such as respect for animal welfare and the environment.

Recent thinking in marketing suggests successful brands are those that have a purpose or a set of values that align with their customers. For example, the Nissan Leaf is for people who are progressive and environmentally sensitive and care about the planet. BMW is the "drivers' car" for people who know and care about the driving experience. Nike is for people who perceive themselves as, aspire to be or admire authentic athletic performers.

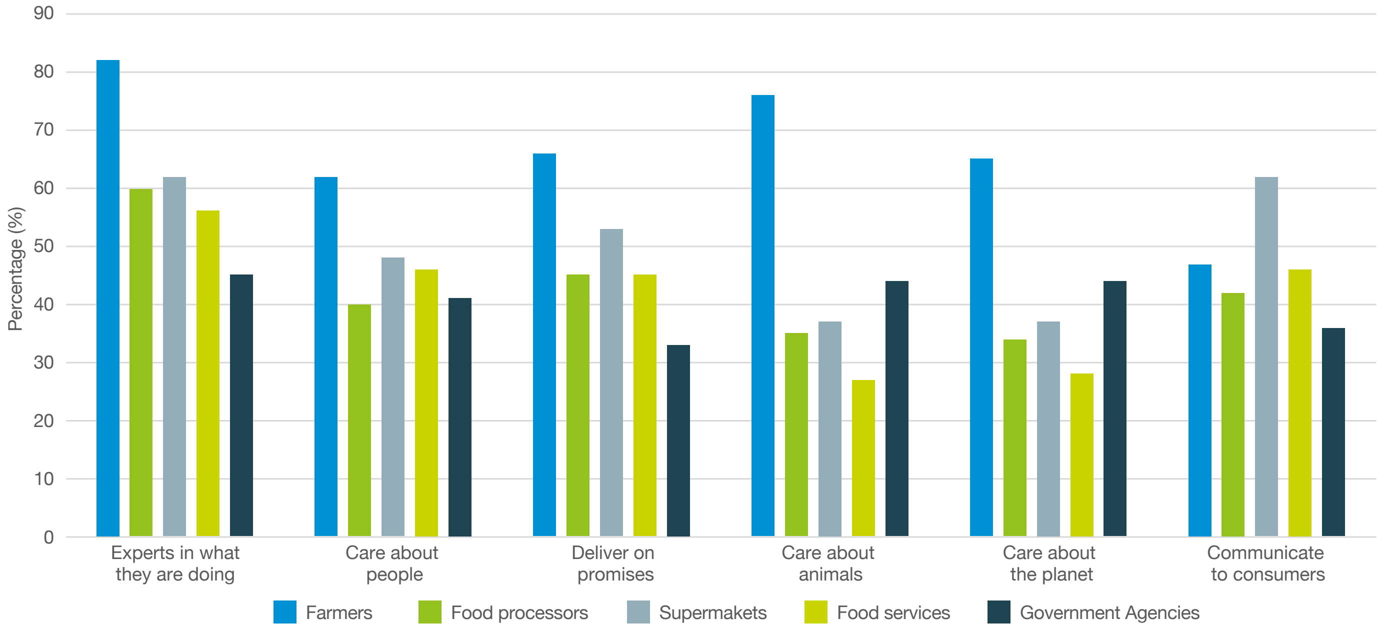


Figure 5. Perceptions of groups in the supply chain

Source: AHDB/Blue Marble

(Q – Thinking about all elements of the food system, how much would you agree or disagree with the following statements about each group on a scale of 1–5, where 1 is strongly disagree? Base: All respondents (1,500))

Ultimately, we are exploring the positioning of agriculture both home and abroad. In both domestic and international markets, British food, collectively, needs to represent or meet certain values that consumers see as important and/or emblematic of being "British". How this is satisfied may fall into various areas.

For some, it may be as the efficient and safe deliverer of affordable food. For others, the custodian of the environment for future generations, or the leader in compassionate food production. However, for all of these, it needs to be in the backdrop of understanding the consumer purchase drivers within specific categories. For example, we should not underplay the importance of cost. The values communicated to consumers can affect the market positioning of products, but the price has to be right too, unless you command a specific niche in the market place. Getting this right becomes even more important in a post-Brexit environment.

Where do consumers get their information? What are the most trusted sources of information?

The food a person chooses to eat is intensely personal. A myriad of factors influence food choices, from personal ethics or beliefs, to tastes and preferences, to cultural heritage. In this report, we have explored where some of these influences may be coming from and how trustworthy people consider them to be.

From previous studies, we have seen an increase in the number of people who are engaged with issues around farming and food production and for some, the topic is top of mind. On that basis, there is demand for more information from certain consumers.

The results demonstrate that any activities to deepen trust need to go across different channels. We can also see that different demographics may respond better to some activities than others. For instance, social media is highly influential for under-35s but less so for older generations. In contrast, channels like radio or books are more important for older, more affluent consumers. It is vital to take this into consideration when planning an effective communications strategy.

“(Retailers) will jump on the bandwagon of a movement, ‘plant-based’ is the BIG thing now, but I always feel their bottom line is more their motivation than the ethics”

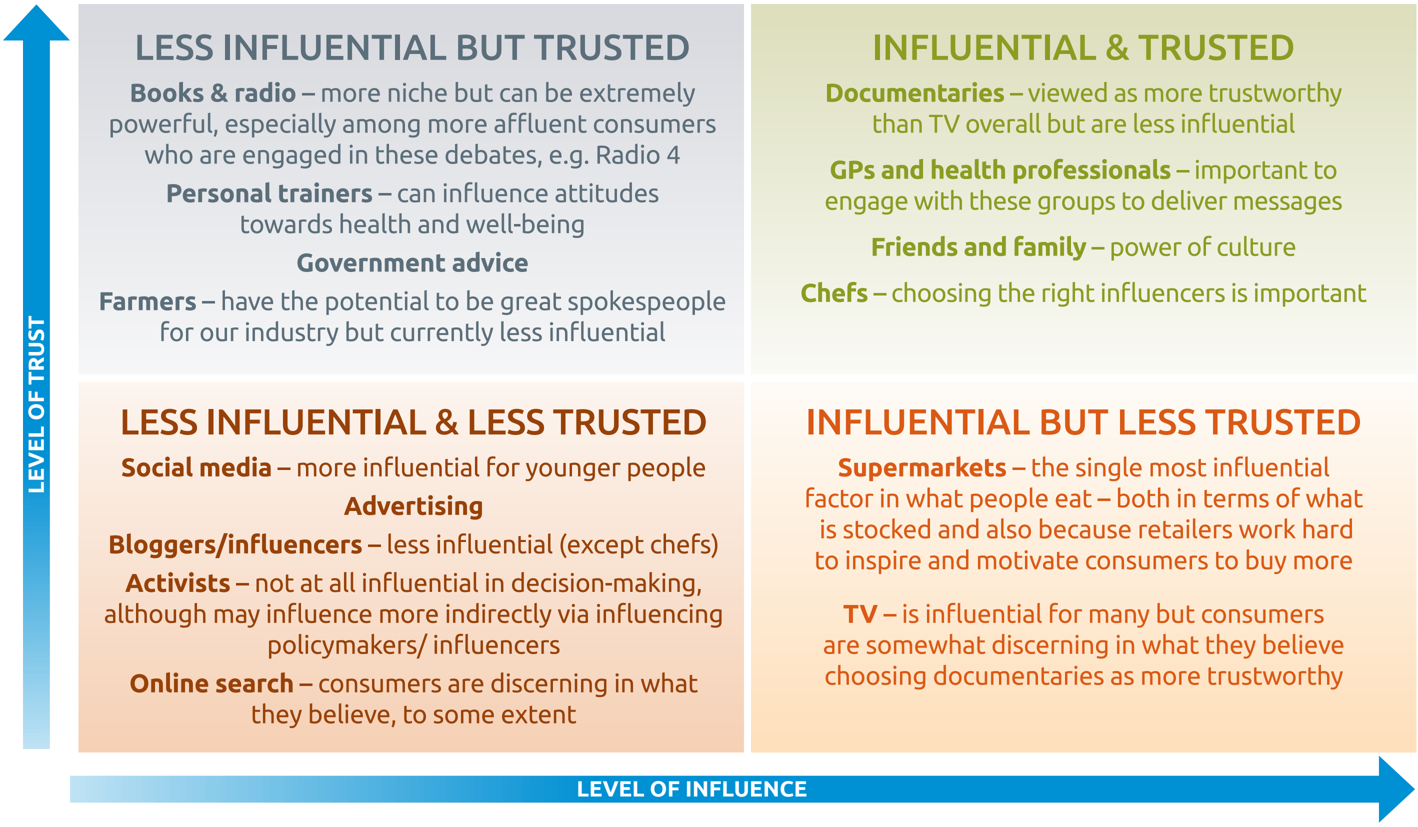
Female, 53, B, Semi-rural, Leeds

“I tend to watch a programme on TV called Food Unwrapped … I trust it because it’s a very reliable source as they go to factories and to the farms where the produce is made and meet the farmers and workers that help in producing a reliable stock”

Male, 39, E, Rural, Old Sodbury

“Farmers … are on the ground and have a reputation and livelihood intrinsically linked to sustaining high quality. They have an inherent duty to maintain high standards and have intimate knowledge of the most fundamental processes involved in underpinning the food system”

Male, 34, B, Urban, Glasgow



> “I think the chefs that do this type of programme seem quite trustworthy. They understand food, and how the way food is changed in processing, for the good or bad. Both Hugh (Fearnley-Whittingstall) and Jamie (Oliver) have run smallholdings too, so for me that makes them more in touch”

Female, 53, B, Semi-rural, Leeds

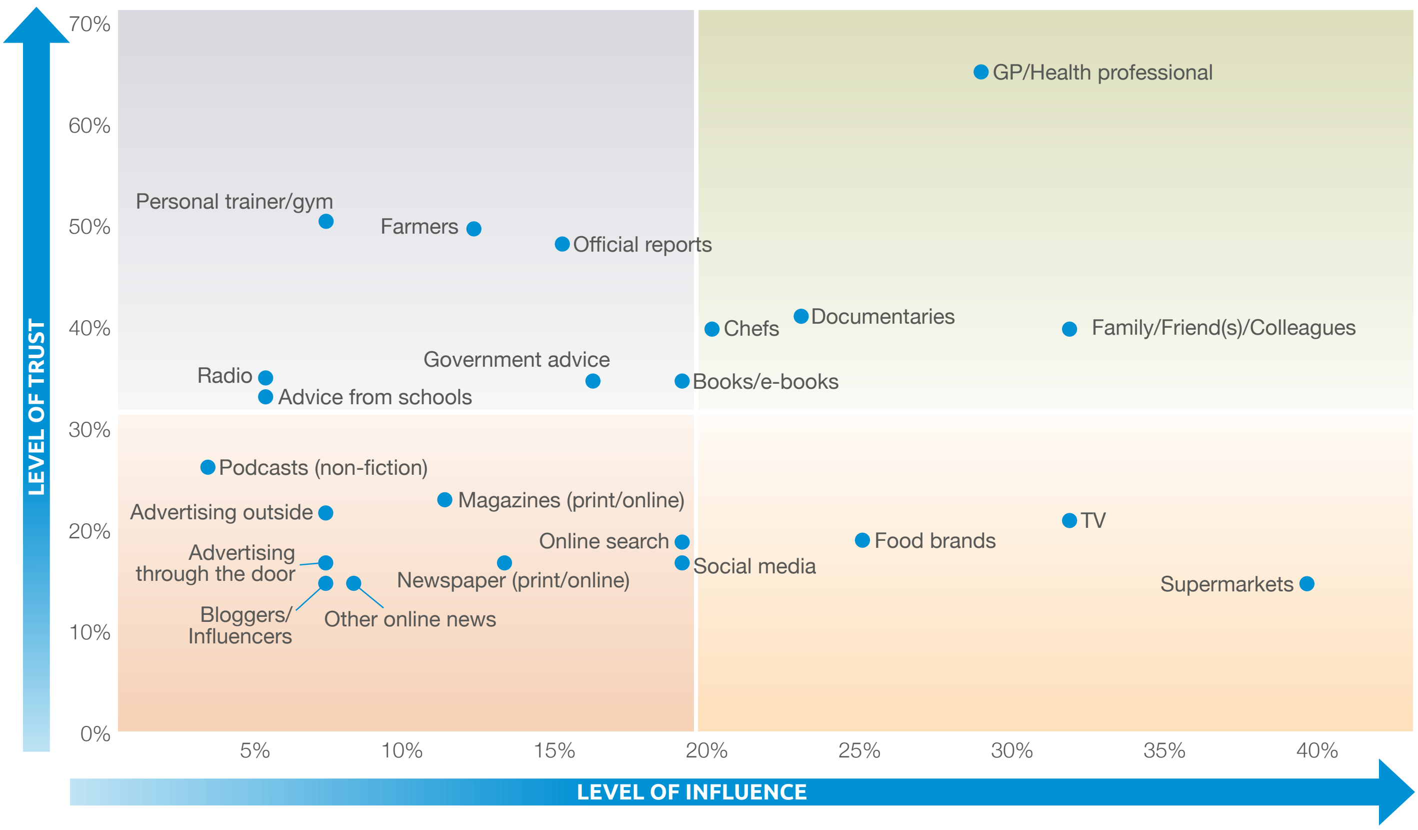


Figure 6. Levels of influence and trust

Source: AHDB/Blue Marble

(Q – Which, if any, of these influence your food choices? Base: All respondents (1,500))
(Q – And how trustworthy is the advice or information from the following? Base: Those who were influenced)

WHAT ARE THE POTENTIAL BARRIERS TO TRUST IN THE FOOD SYSTEM?

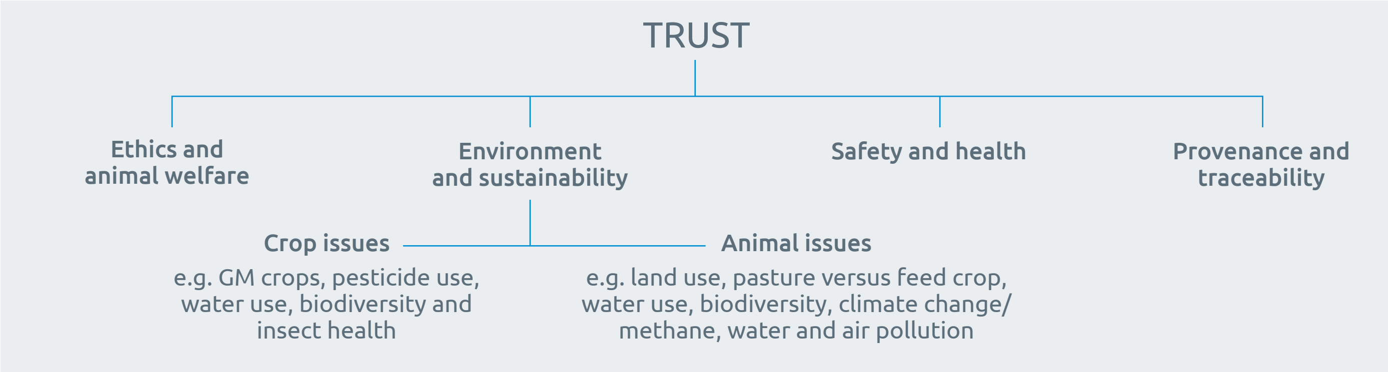


Figure 7. Issues map

Ethics and animal welfare

This is an evolving area and, according to research agency IGD, in 2018, 70% of meat, fish and poultry shoppers said ethical production was an important driver of their product choice – up from 58% the previous year. Also, 84% of shoppers said they were willing to pay more for higher quality and welfare meat. We know that in reality this is likely to be exaggerated (in the meat shopper journey report, we found that 9% said welfare was a key consideration when buying meat – this dropped to only 2% when they were actually at the fixture). Decisions at fixture are impacted more by factors such as price (31%), easy to cook (34%) and appearance (17%). However, the evidence points towards consumers becoming more socially conscious and aware of some of the issues surrounding welfare.

Today, 60% of eggs sold in the UK are free range, compared with 32% in 2004 – showing that the power of social pressure can, and has, restructured entire markets. As yet, specific claims relating to outdoor access are less prevalent on pork (or beef and lamb), compared with poultry. Working with Kantar, we estimate that only a small minority (12% for the 52 w/e 16th June 2019) of pig meat sold in the UK has an outdoor claim attached to it. However, there is scope for development as we know that more pork is actually bred outdoors (40%) than is sold as such. There is a disparity between supply and demand, showing that consumer purchasing behaviours lag behind their stated preferences. Looked at in another way, willingness to pay is often limited. Latest Kantar data, for the 52 w/e 16th June 2019, shows that the average cost of a kilo of pigmeat is £5.48, but an outdoor claim raises the price to £7.98, putting it beyond the desired means of most consumers.

Currently, differentiating a product based on its production method is a challenge given that many consumers are detached from the intricacies of farming. In future, greater transparency of production methods may improve segmentation in product tiering, allowing consumers to make a more informed choice.

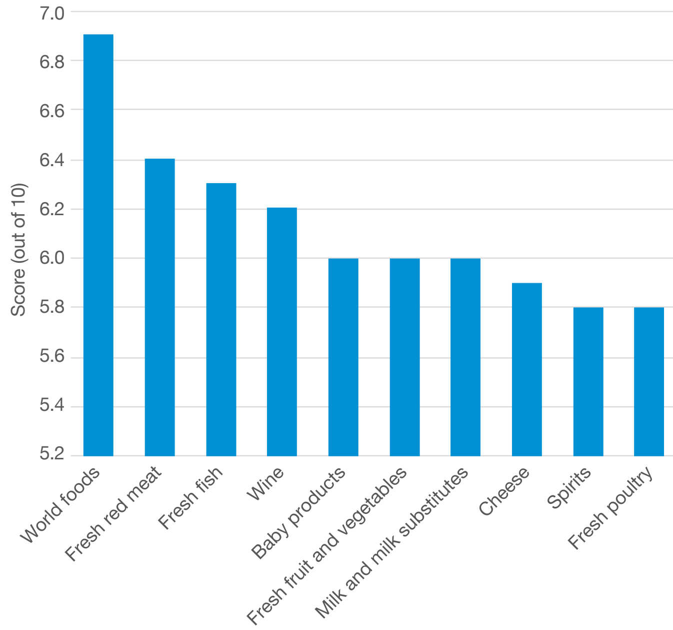


Figure 8. Top 10 categories where shoppers say 'origin' is a driver of product choice

Source: IGD Shopper Vista "'Health, provenance and ethics", 2018

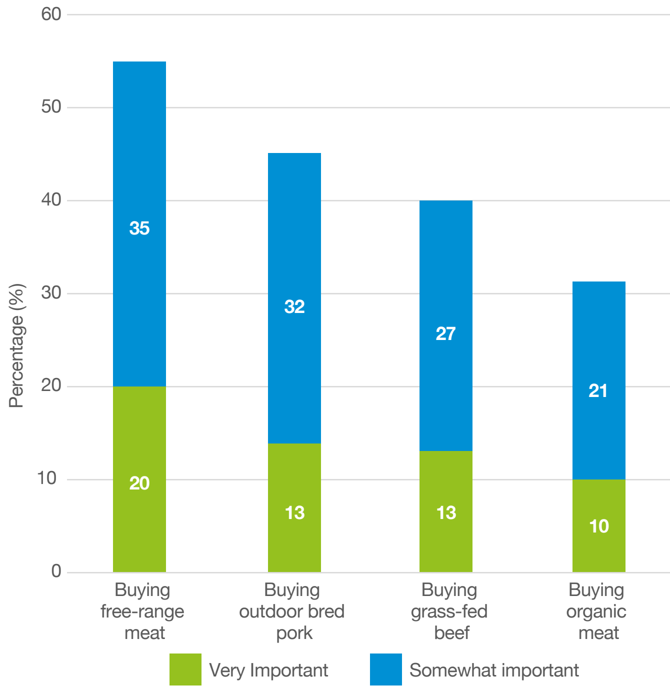


Figure 9. Claimed importance of product label origins

Source: AHDB/YouGov April/May 2019 Base: All respondents (1,052)

Non-governmental organisations (NGOs) who are motivated ideologically by the idea that using animals for their milk or meat is fundamentally wrong are actively seeking opportunities to portray agriculture in a bad light. As a result, many documentaries and online exposés exist, with the goal of making people question their food choices and encouraging dietary change. For many in the agricultural industry, the increased proactive targeting and coverage given to NGOs on specific topics is a concern.

While this can put agricultural practices under the spotlight, it is misleading to assume that consumers accept whatever negatives are put forward about our industry. AHDB's research shows a degree of scepticism and there is an argument for trusting the ability of the wider population to identify the exaggerations and contextualise those who make the claims.

Agriculture itself is broadly trusted but should not be regarded as a "sure thing". It is not across the board and that trust is not blind. It could be impacted in future by a shift in consumer acceptance of certain practices, or growing awareness, or consistent campaigning. To maintain and deepen that trust, British agriculture needs to demonstrate that its values are in step with those of society, that it is open and honest. It needs to show a commitment to continually improve performance in areas that matter to consumers, including welfare and environmental impact, to protect and build reputation. This improvement must be objectively and independently measured for credibility.

Environment and sustainability

Environmental issues have grown to rank among the most top-of-mind issues for consumers, with more than 40% of consumers expressing that they are very concerned. Global warming and climate change is a key concern, but not necessarily linked to farming specifically.

By far the biggest food-related issue for consumers, though, is not climate-related but that of pollution from plastic waste. There is a definite "Blue Planet" effect in the wake of Sir David Attenborough's popular documentary. In terms of scale, people are as worried about this issue as Brexit and the state of the NHS. Almost 6 in 10 consumers say plastic use has affected their decision-making when buying food.

Over time, we have started to see environmental concerns growing in importance as a stated reason for meat or dairy avoidance or reduction, or for becoming vegan. However, it is important we look at food trends in a wider context and we must remember that vegans are a very small minority, with only 2% of the population claiming to be vegan and an even smaller 0.6% actually following a purely vegan diet.

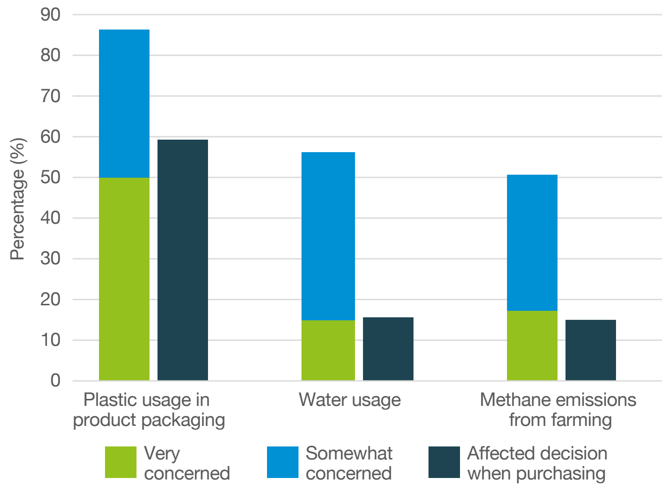


Figure 10. Concern for issues in food production

Source: AHDB/YouGov April/May 2019 Base: All respondents (4,436)

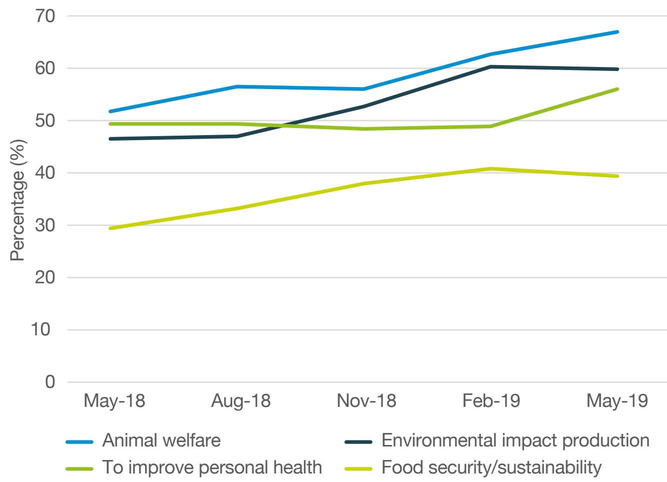


Figure 11. Incentives for being/becoming vegan

Source: AHDB/YouGov Base: Vegans/likely to become vegans (300–400 per wave)

Safety and health

Food safety issues are less prevalent for consumers – only around a third are very concerned. However, they do crop up from time to time and previous safety scandals live long in the mind of consumers, and the press. The horsemeat scandal of 2013, the shadow of BSE before that and, in recent times, negative press relating to chicken processing have all produced some concerns in food safety and human health.

> "Since the revelation that the meat supply chain was contaminated a few years ago there are clearly problems with provenance. I'm thinking back to products labelled as one meat including other animals"

Female, 54, D, Semi-rural, Shropshire

However, British consumers have more trust in British food than products produced overseas – three-quarters say they buy British where possible (although only a third are prepared to pay more for it).[2] We also found high levels of trust in the government food inspection system and a positive attitude towards assurance schemes where recognised.

While food safety has the potential to be more of an issue, currently it is not top of mind compared with markets such as China, where there is much greater fear and foreign imports are valued more highly for their safety.

This particular area is one that will grow in importance dependent on the current news stories, where we see peaks in concern after scandals hit the headlines.

There are also some misconceptions. One of the biggest food safety concerns among consumers is the use of hormones in animal rearing. There are also concerns about antibiotics getting into the food chain. In the UK, there are strict stipulations against hormone use and to prevent antibiotics from entering the food chain. Therefore, there are opportunities to better communicate this to reassure consumers when buying British produce.

2. Source: IGD

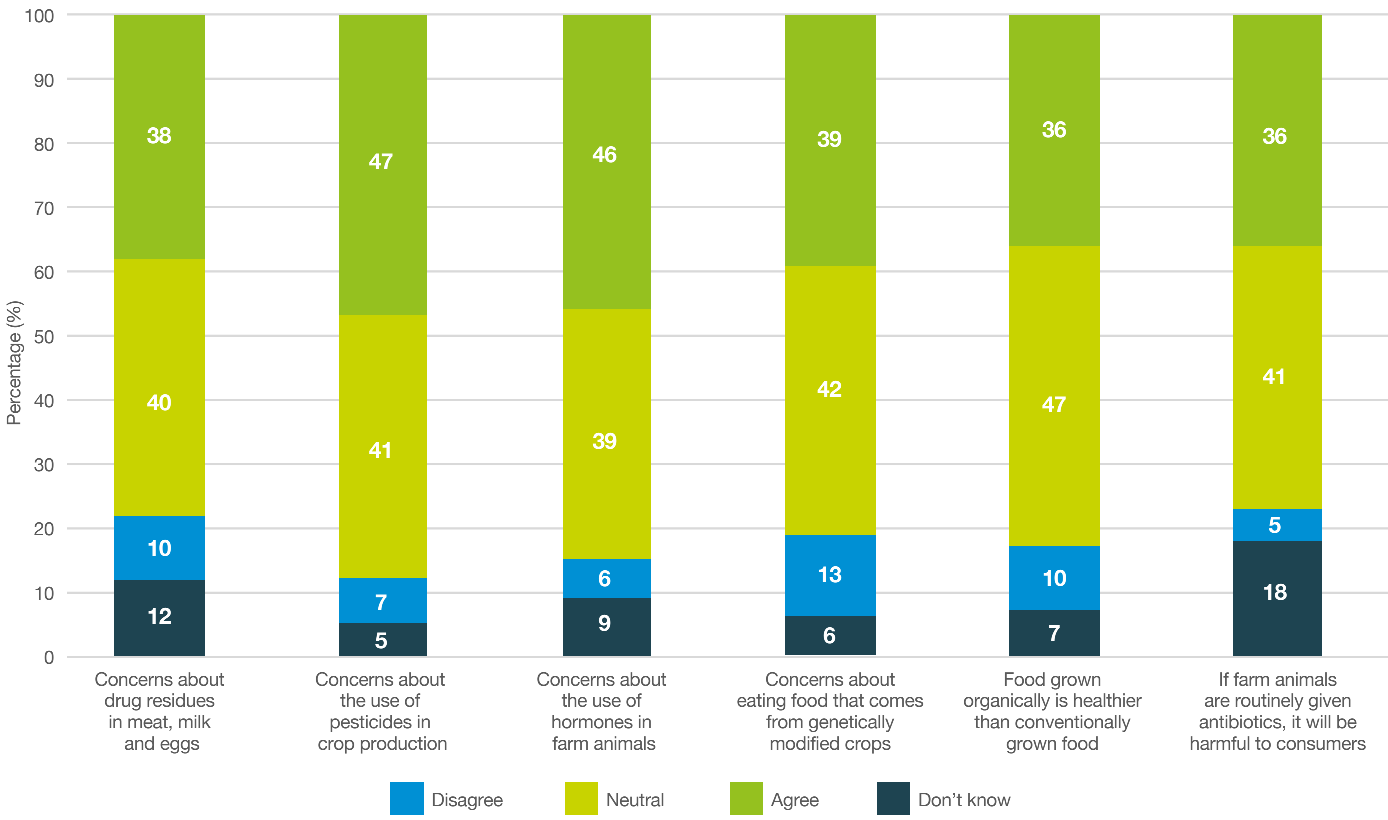


Figure 12. Consumer concerns on how farming practises will affect personal health

Source: AHDB/Blue Marble

(Q – Please tell us how much you agree or disagree with the following statements. Base: All respondents (1,500))

Provenance and traceability

The origin, or source, of products is particularly important in the fresh red meat category, compared with other grocery categories (as in Figure 8). In light of media coverage on the UK's future trading partners, there has been speculation relating to differing food standards around the world. British produce can be appealing both from a quality assurance point of view but also in offering higher welfare standards. In addition, Britishness equates to local, which also carries a perceived sustainability benefit, both in terms of food miles and methods of production. However, we do need to be cautious in overstating the importance of provenance. Many shoppers pay lip service to the idea of buying British – 25% say it is important to them. However, at fixture, this drops to only 9%, as other factors such as price and appearance take over[3].

> "I would really like it if we did have much more information about the food production process and where our food comes from, where it's processed, etc. For me, that transparency would engender more trust"
>
> **Female, 46, C1, Rural, Notts/Derby**

But, according to a study carried out by Harris in association with The Grocer, 65% of shoppers said traceability was important to them when buying meat.

The issue of traceability is something that we explored further in our qualitative research. Ensuring meat is traceable seems to be a good way of developing trust, as consumers can be assured of what they are buying and that products are produced to strict assurance standards such as Red-Tractor-approved.

3. Source: AHDB: The meat shopper journey, Oct 2018

Some consumers recognise that traceability is important to them; others are less motivated by the idea. However, a common theme is that while traceability is important, most consumers don't want to be responsible for doing the tracing.

> "The consumer is not the expert – yes, they should make informed choices, but I think the experts should investigate and instruct best practice"
>
> **Male, 44, B, Semi-rural, Cardiff**

Consumers want to feel confident their retailer, or the government, has taken responsibility for ensuring goods are fully traceable through the supply chain. As with many consumer issues, when push comes to shove, time pressures and a need for convenience tend to outweigh ethical considerations.

> "Produce from each farm should be rated by Defra and this information should be available at the point of sale. All food should be traceable by the consumer back to source. Consumers should be exposed to what the standards for farming are in the UK"
>
> **Male, 52, E, Urban, East London**

“The meat counter in Sainsbury’s is very good, they can tell you where your meat has come from and also what’s in it … At least when purchasing, you could read the information then decide if it’s right for you”

Female, 33, C2, Urban, Cardiff

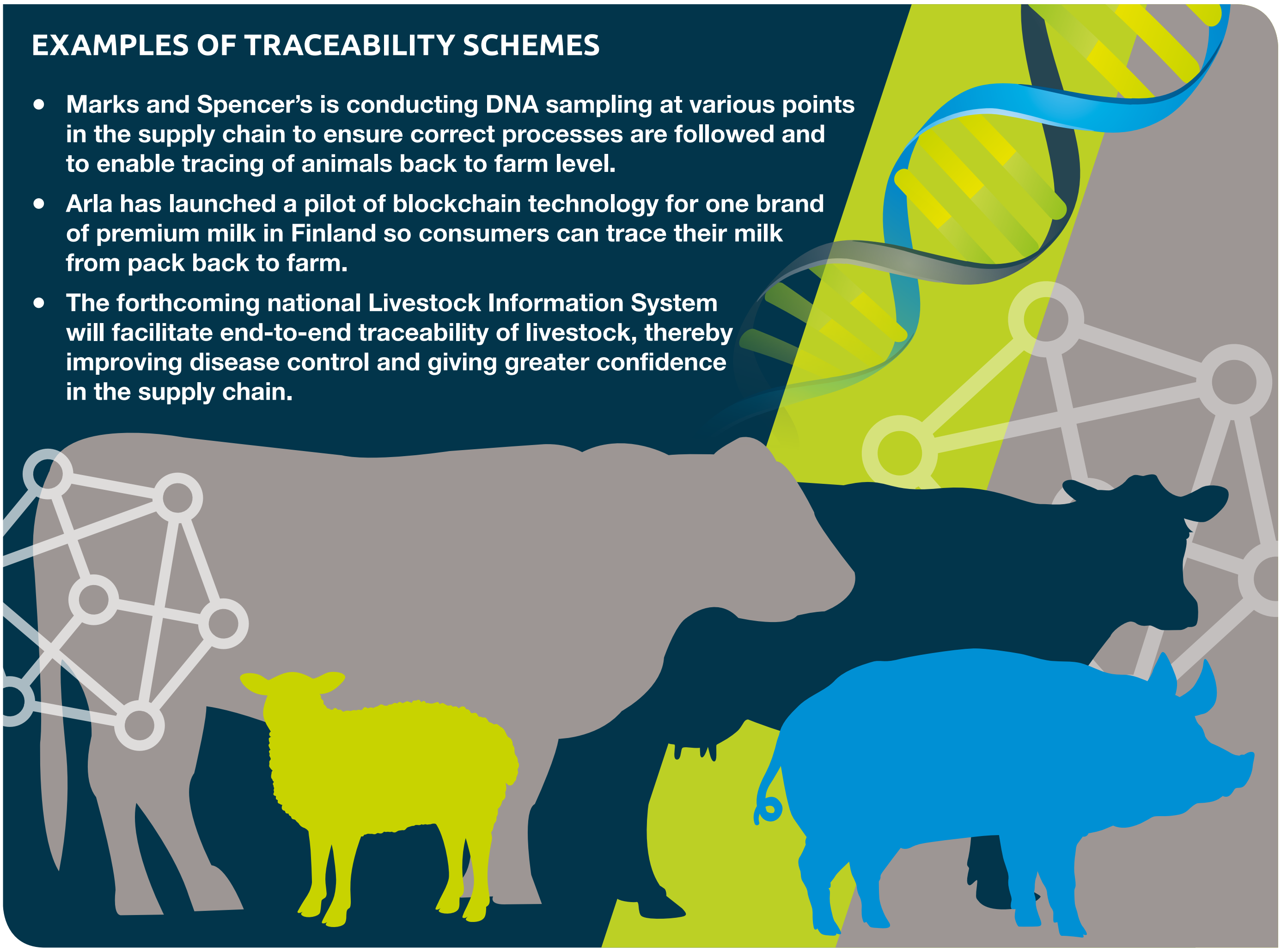
For other consumers, too much transparency could be a bad thing. They want to know the animal had a “good life” on farm and that the meat arrived safely to their plates but prefer not to think about the interim processes.

“To be perfectly honest, I am not sure that we need ‘complete transparency’ and for the full information to be advertised in great detail. We know where meat comes from, but I suspect that we disassociate (ourselves) when selecting cuts of meat”

Female, 39, A, Semi-rural, Yorkshire

EXAMPLES OF TRACEABILITY SCHEMES

- **Marks and Spencer’s is conducting DNA sampling at various points in the supply chain to ensure correct processes are followed and to enable tracing of animals back to farm level.**
- **Arla has launched a pilot of blockchain technology for one brand of premium milk in Finland so consumers can trace their milk from pack back to farm.**
- **The forthcoming national Livestock Information System will facilitate end-to-end traceability of livestock, thereby improving disease control and giving greater confidence in the supply chain.**



HOW CAN WE IMPROVE AND MAINTAIN TRUST?

Clarity of labelling is preferred over other options

When given a list of potential ways to view traceability, one of the most warmly received tools to improve impressions of transparency is clearer labelling around where and how animals are reared, and, to a lesser extent, the actual farm.

According to Mintel, providing on-pack information about where meat comes from is interesting to 68% of processed meat and poultry shoppers. Knowing more about how processed meat products are made would make 55% of consumers trust the products more[4]. However, on-pack labelling is a crowded space and a confusing one for many consumers. This is further complicated by a lack of continuity between brands, and retailers can be difficult for consumers to navigate and understand the details of on-pack claims, let alone verify the transparency of the product.

We found there is a greater preference for system of production labelling on pack rather than using new technology like scanning QR codes, supported by blockchain. This has been used in France by Carrefour for their higher-quality Auvergne chicken line. In our qualitative research, the latter was seen as quite convoluted and not something the majority of consumers could see themselves doing. Although some did say they found the idea comforting, even if they would never use it.

Access to farms and farmers

Open farm events, where consumers can visit farms directly and talk to farmers, are seen as a positive way to develop trust, particularly among consumers with children. Webinars with farmers are not as positively received but may be a useful channel, particularly in schools. For example, LEAF's FaceTime a Farmer initiative has been positively received. LEAF reports 150 school and farmer pairings already. In addition, 100% of farmer and student/teacher participants enjoyed the calls, and 100% of teachers said that their pupils/students were really engaged and gained a better understanding of where their food comes from.

Deepening trust in the future

Our research demonstrates that society's values are changing, although this is not across the board. Research suggests that those who are more price-restricted place value as a top priority. Therefore, those who have more disposable income can afford to trade up in to healthier, higher welfare or environmentally friendly products.

These twin pressures mean that an optimum food system must cater for the demands of both groups, producing to ethical and environmentally responsible standards in a cost-effective way.

4. Source: Mintel Processed poultry and red meat report, 2016

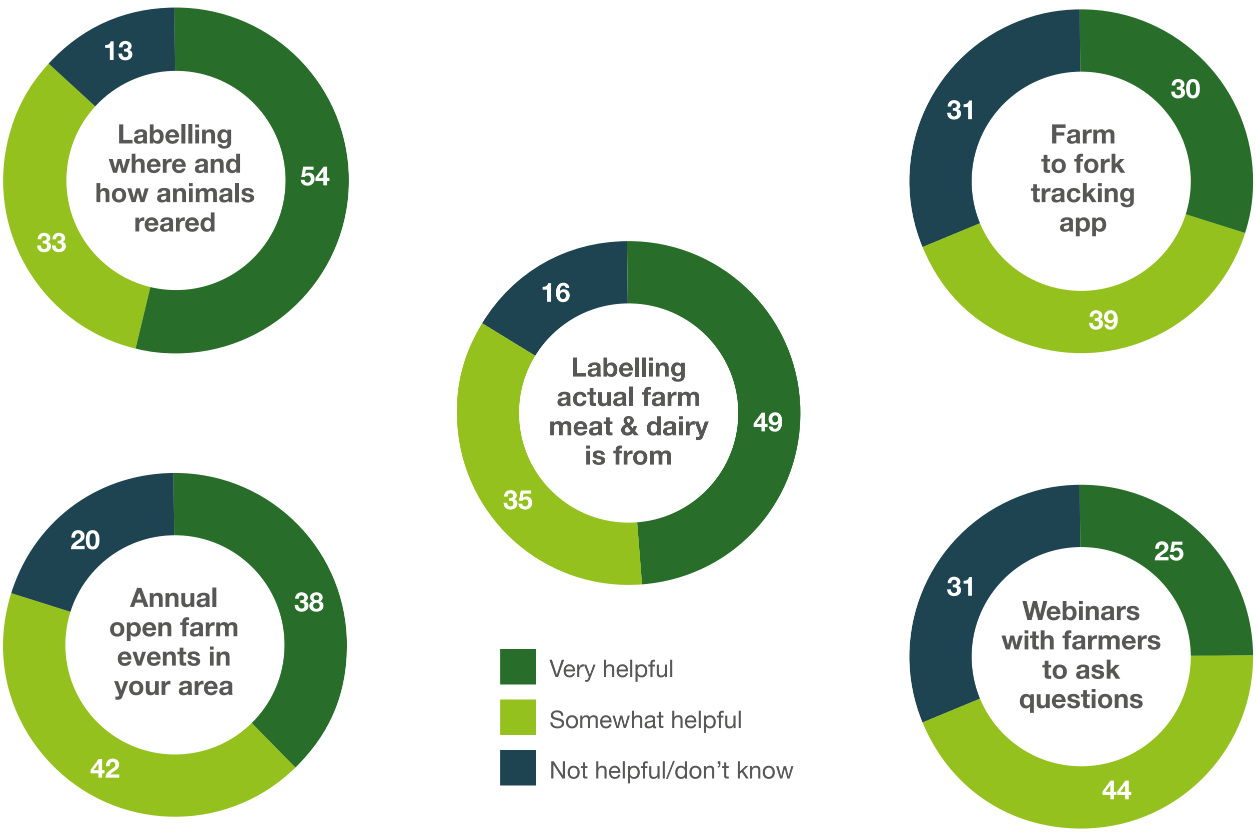


Figure 13. Response to new ideas for improving trust in the UK food system

Source: AHDB/Blue Marble

(Q – How helpful do you think each of the following ideas would be in improving your trust in the food system in the UK? Base: All respondents (1,500))

BUILDING TRUST: THE CRITICAL STEPS

Understanding consumers' beliefs NOT educating them

Trust is NOT about educating consumers about specific practices. A practice that provokes a visceral response in a consumer is likely to still provoke a visceral response when they understand why. A challenge is asking consumers what they want from food production rather than telling them what they need. Finding the balance between transparency and an appreciation for a practice is important if trust is to be maintained.

This balance is further complicated by a lack of understanding of farming's financial realities. What is viewed by a farmer as a rational business decision may be viewed differently by a shopper, who is likely to approach the same issue from an emotive viewpoint.

Looking for instances where science and sentiment coincide

We should be looking at the latest scientific thinking and benchmarking against consumer preferences. It is important that, as an industry, we are constantly exploring new and improved ways of working to ensure that the highest standards in animal welfare and food production are maintained. Being trusted and transparent is crucial and businesses must ensure they adapt to the demands and concerns of consumers. The scientific world is continuously exploring new and improved ways of working through research and technology, as well as sharing best practice with our counterparts overseas. By applying new learnings, the farming industry is able to be more efficient and sustainable, while meeting the demands of an ever-increasing population.

Demonstrating shared values and building emotional connections

Trust is an extremely valuable commodity, but it is fragile. As an industry, it is critical to invest in boosting that trust, demonstrating where we are doing the right thing and showing our shared values. At the same time, we should minimise any instances of reputational risk or face a longer-term erosion of our bottom line.

It has been proposed that, in the future, agriculture could be incentivised via a model that provides public money for public goods (including welfare and environment). We need to take every opportunity to demonstrate where the values of agriculture (those of environmental stewardship, of caring for animals, of caring for people) resonate with those of wider society. In looking after our soil health and land, we look after our future economic potential and our environment.

We need to build emotional connections with consumers, whether that is face-to-face or by judicious use of the mainstream and social media. Farmers themselves can help here.

Offering greater clarity where it is needed/ wanted and easiest to access

Consumers also indicate there is scope to look again at labelling and simplify their choices. Currently, consumers feel the multiple labelling systems are difficult to navigate and are unclear as to what specific terms mean.

Ensuring bad practice is eliminated

We must drive out instances of bad practice and poor welfare. It damages trust in the whole industry, not just those farms concerned. The law, monitoring by the food standards agency and various assurance schemes are in place to prevent breaches. Where failures are reported, the industry should be united in condemnation. Consumers understand that farmers don't set out to do a bad job and that it's not in their commercial or moral interest to do so, but, as is seen elsewhere in life, one or two negative reports can end up having a disproportionate negative impact on the reputation of the industry.

Standing proud in what makes British and being clear with consumers

It is also essential to highlight the points of difference between practices on British farms and those overseas and be proud of what makes us unique. That said, we must remain competitive in terms of price in order to meet consumer and manufacturer expectations of value. Some consumers would be willing to spend more for British, but many wouldn't and even the most affluent aren't exclusively British shoppers. Therefore, we also need to make efficiency savings where possible but not compromise in our high standards. The reward for getting this right is a preference for British, not a higher price.

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Susie Stannard has spent almost 20 years in the market research industry, focussing on consumer insight. She has worked for two large market research agencies (Millward Brown and Nielsen), focusing on the food and drink industries in areas such as brands, advertising, consumer usage and attitudes and how attitudes shape buying behaviour. She also worked for H.J.Heinz, supporting marketing and innovation. Latterly she brings these skills to the agriculture sector at the Agriculture and Horticulture Development Board (AHDB), where she focusses on leading insight into the Dairy sector, amongst other projects. She contributes to AHDB's Targeted Activity Group (TAG) on Animal Welfare and Behaviour.

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AHDB's Consumer Insight team actively tracks, monitors and evaluates consumer behaviour, reporting on the latest consumer trends and picking out what they mean for the industry and agriculture.

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