



TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

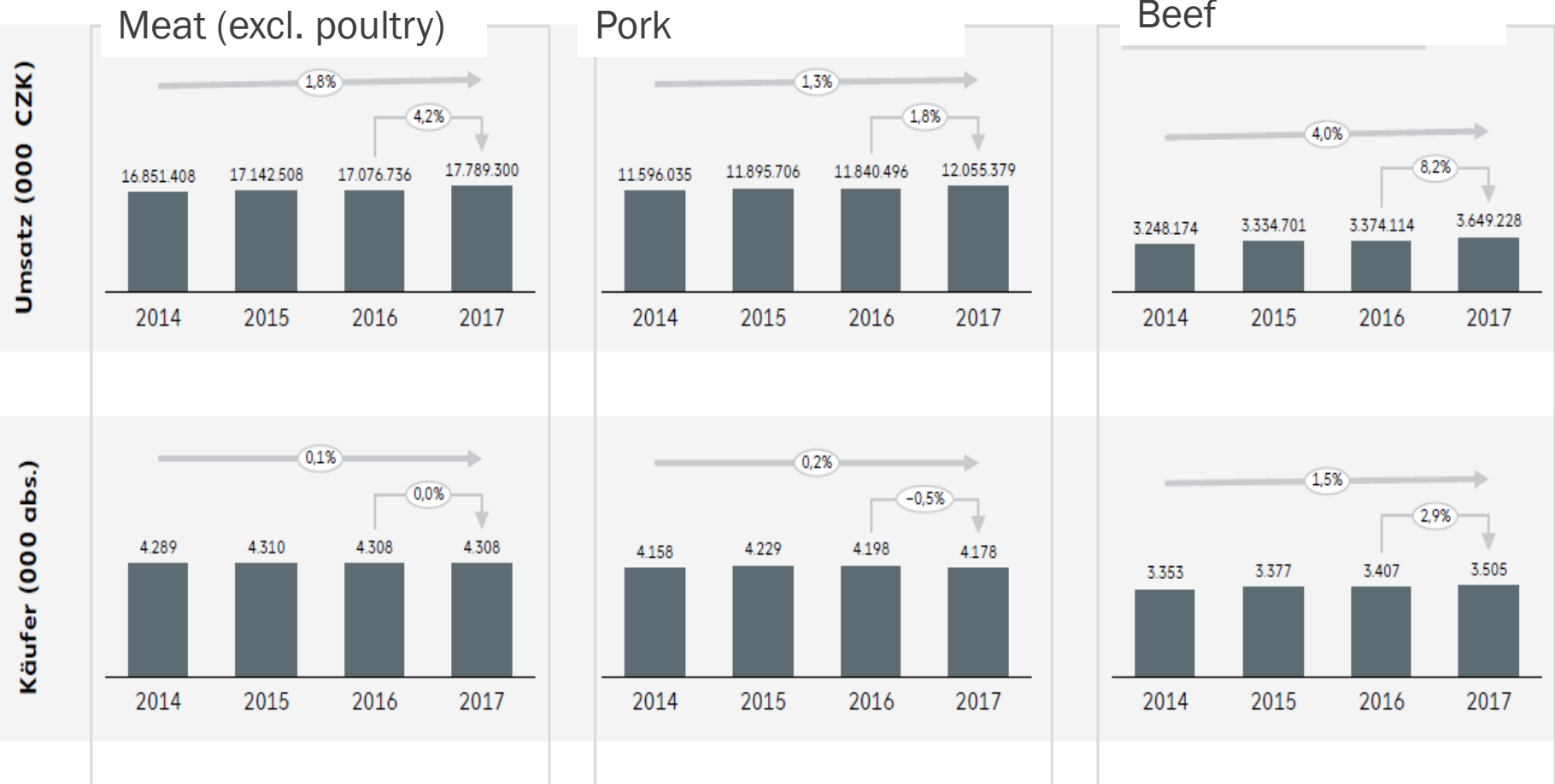
Meat Market Observatory
25 June 2018

Belgium

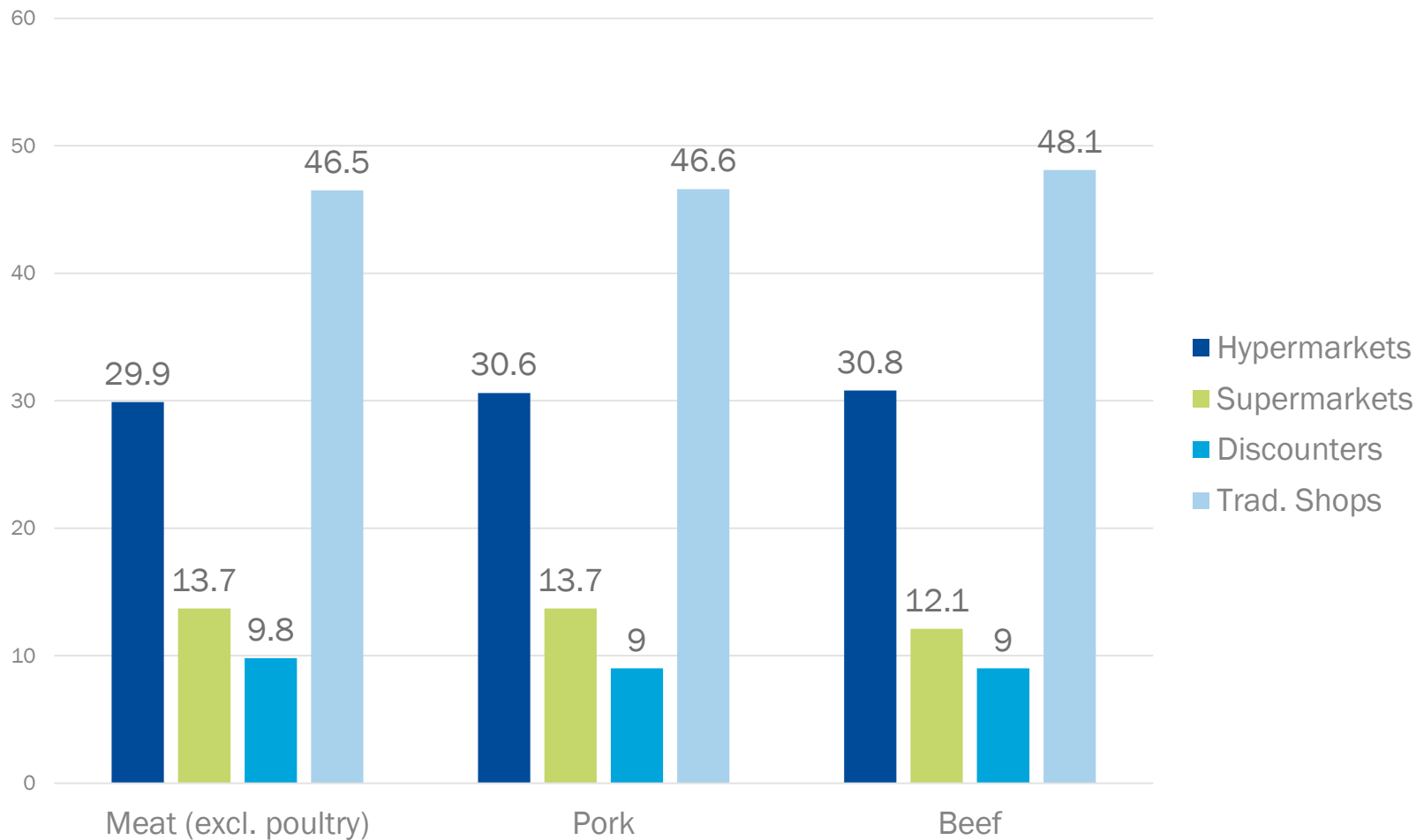
Product category	Price evolution (% change Apr-18 vs Apr-17)	Price evolution (% change Jan-Apr 2018 vs Jan- Apr 2017)
Total pigmeat	0.4%	0.8%
Delicatessen (salami, ham, prosciutto, etc)	3.2%	2.4%
Processed pork (<i>élaborés de viande</i>)	2.3%	2.2%
Total beef and veal	-0.1%	0.1%

Source: COMEOS

Czech Republic: meat sales



Czech Republic: meat sales by distribution channel, %



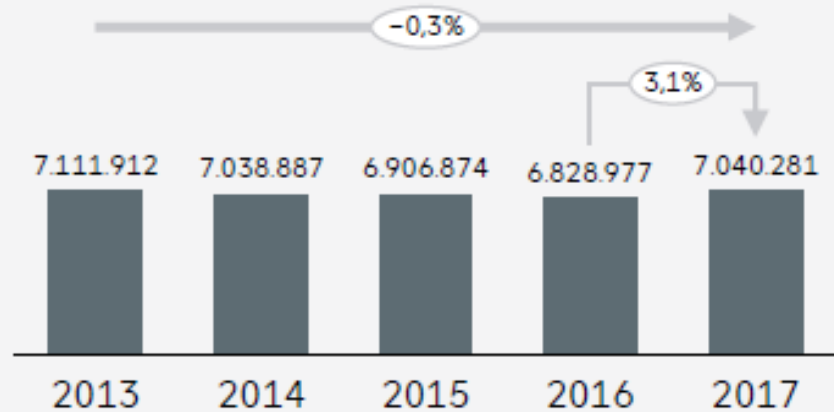
Germany: meat sales

Total annual sales, meat (excluding poultry)

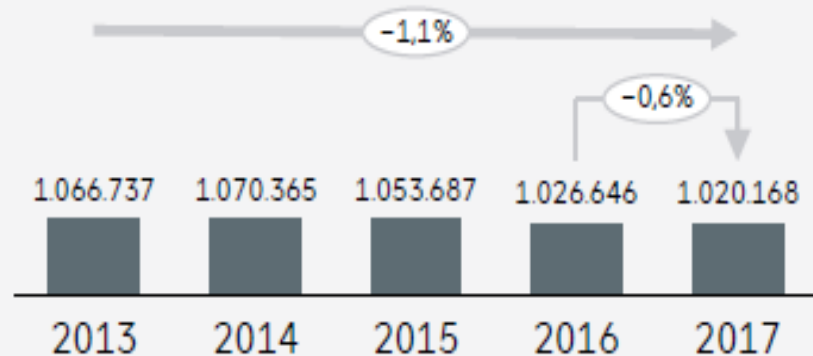
Values ('000 EUR)

Volumes ('000 tonnes)

Fleisch (ohne Geflügel)



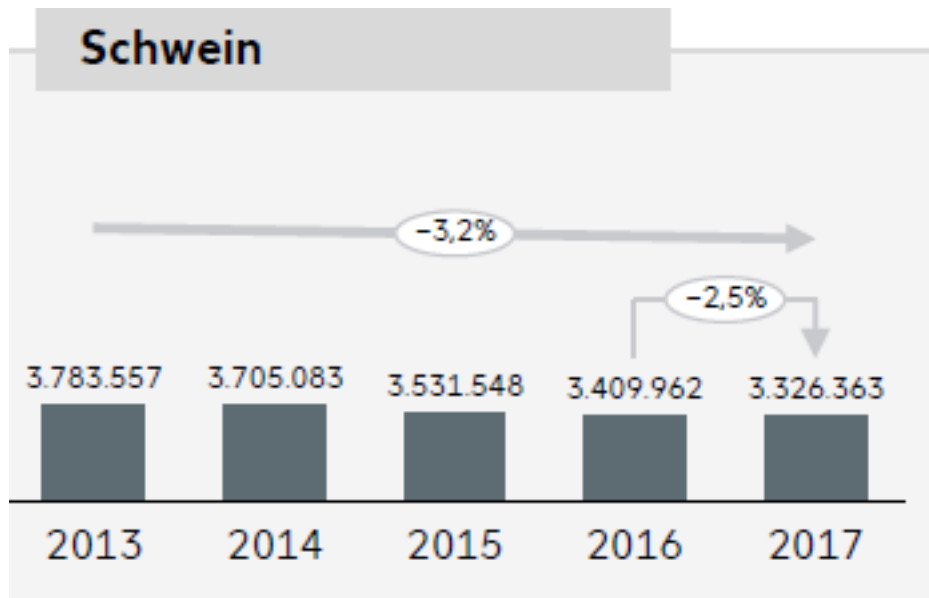
Fleisch (ohne Geflügel)



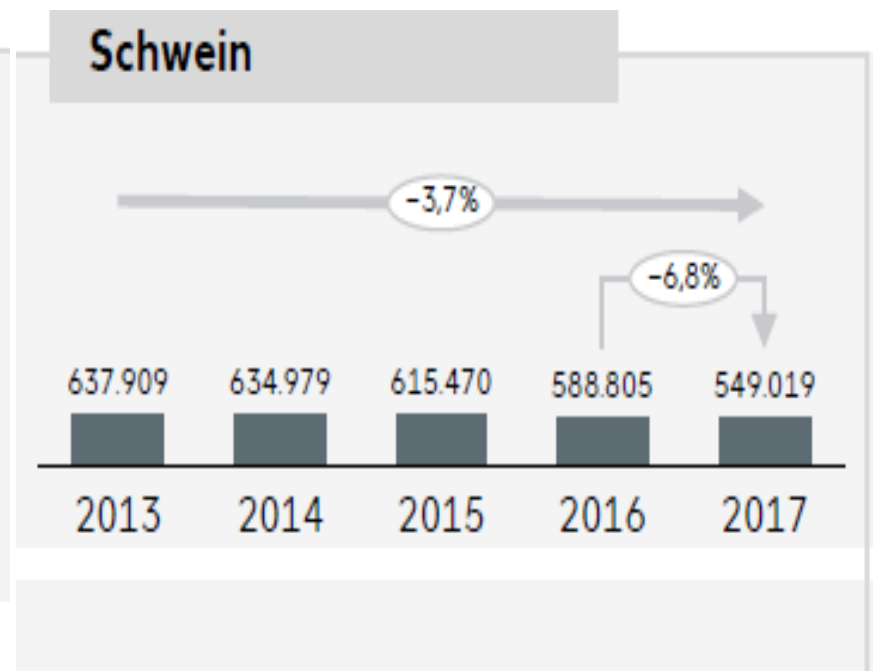
Germany: pork sales

Total annual sales, pork

Values ('000 EUR)



Volumes ('000 tonnes)



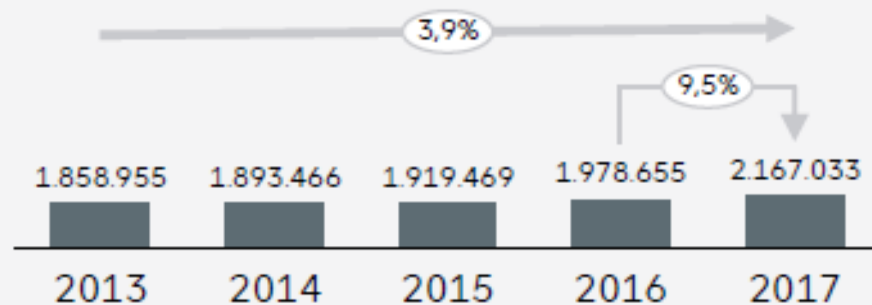
Source: GfK

Germany: beef sales

Total annual sales, beef

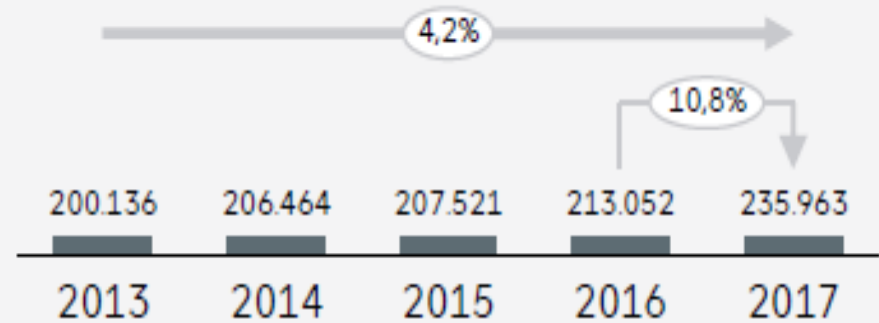
Values ('000 EUR)

Rind



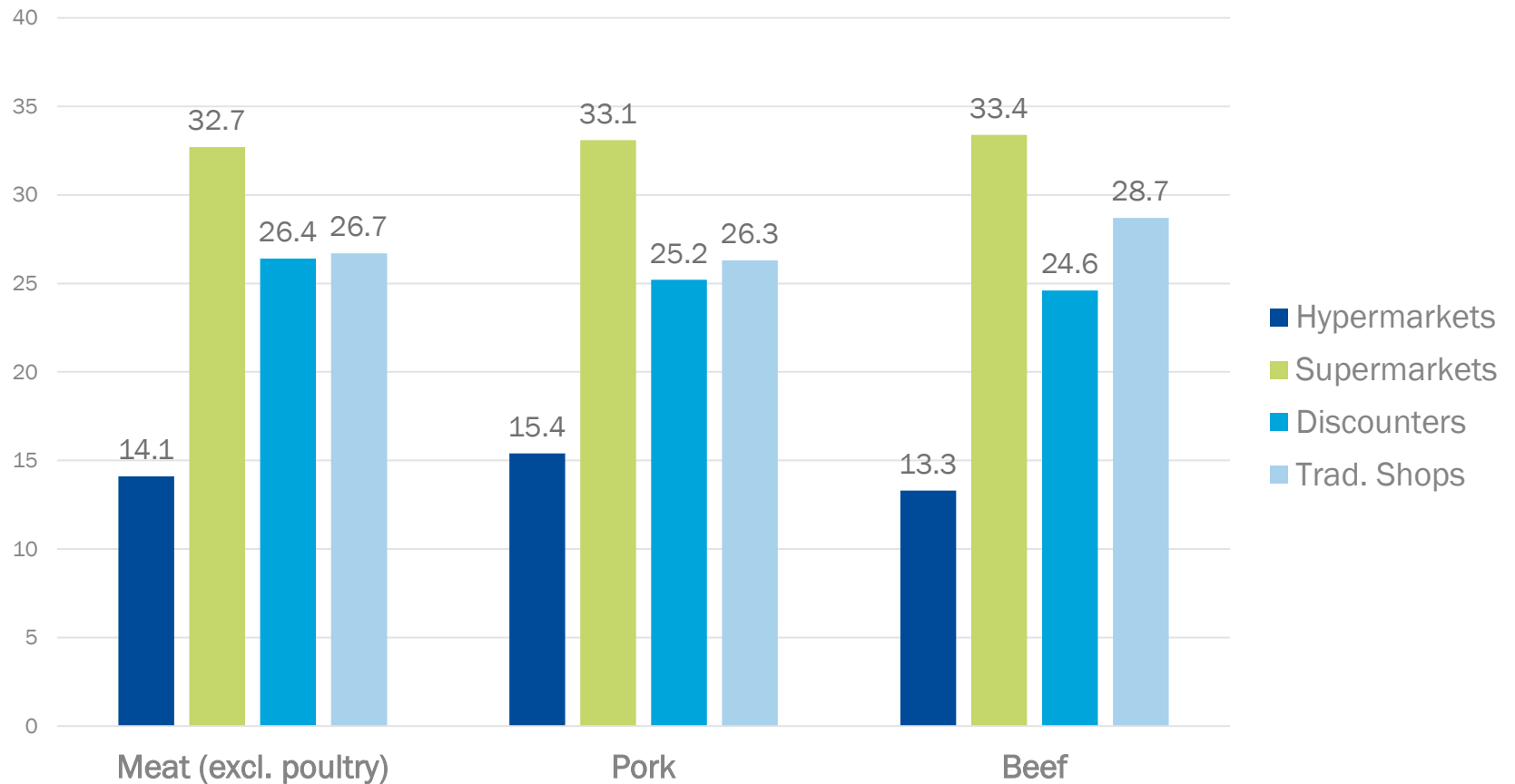
Volumes ('000 tonnes)

Rind



Source: GfK

Germany: meat sales by distribution channel



Source: GfK

France

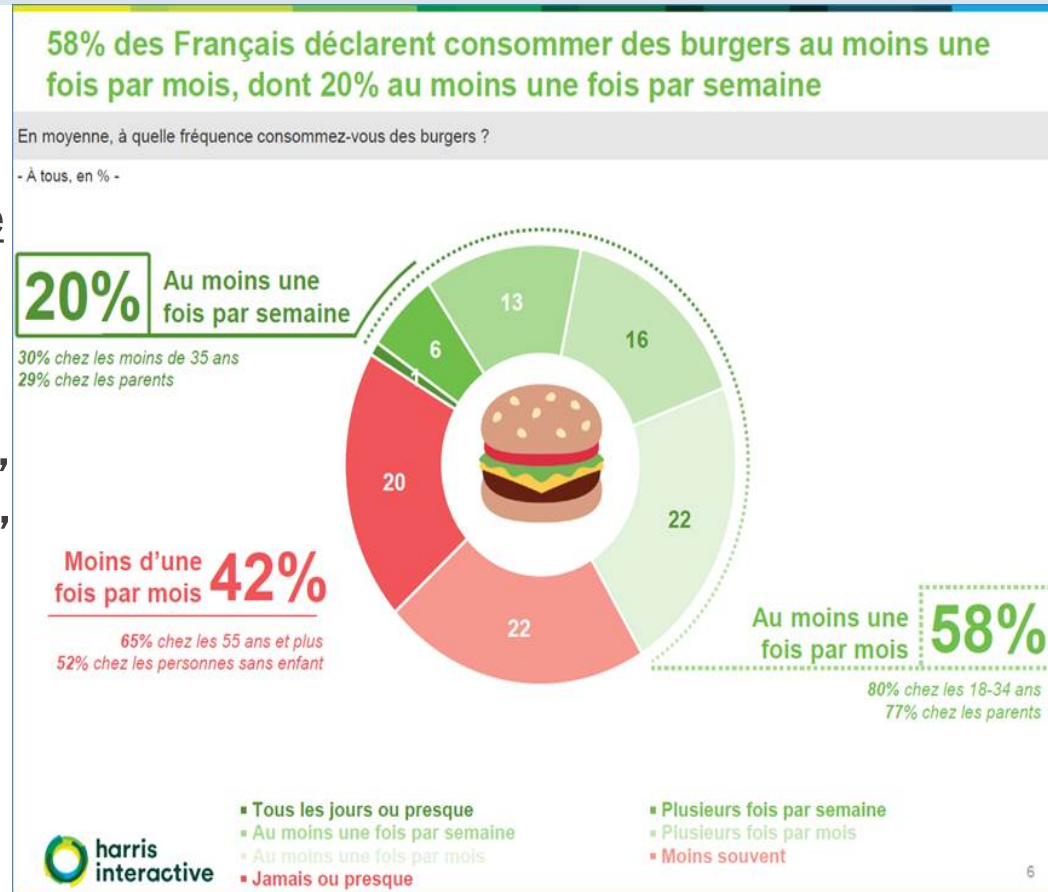
Period ending 15 April 2018

Product category	volumes (% change year-to-date)	price (% change year-to-date)	volumes (% change Year-to-year) (52 weeks)	price (% change Year-to-year) (52 weeks)
Fresh meat	-6.6%	1.3%	-4.2%	0.9%
Fresh beef	-6.3%	1.2%	-3.9%	0.9%
Fresh veal	-6.5%	-0.6%	-5.9%	-0.6%
Fresh lamb	-4.7%	1.0%	-5.8%	1.7%
Fresh pork	-9.0%	1.5%	-6.9%	1.7%
Tripe Products	-5.5%	-1.0%	-4.7%	-1.7%
Poultry	-2.0%	1.6%	-1.4%	1.2%
Frozen Meat	-1.8%	1.3%	0.3%	0.3%
Ham and other meats	-2.8%	2.9%	-1.4%	2.9%

Source: Kantar Worldpanel

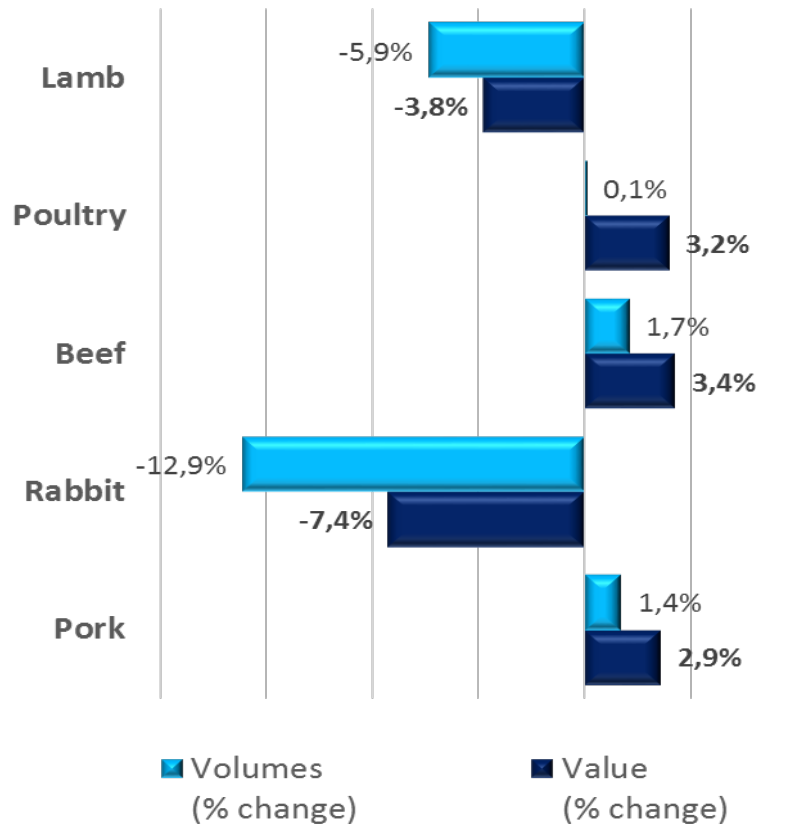
France: trends in meat consumption

- Consumption is still decreasing, nothing new
- One caveat is that the data don't include out-of-home consumption
- This segment is becoming increasingly relevant:
 - according to Gira Conseil, burger sales, now on the menu of 85% of restaurants, exceeded for the first time in 2017 the sales of ham butter sandwich, with more than 1,460 billion units sold.
 - 58% of the French consume burgers at least once per month, of which: 20% once a week
 - Out of these burger consumers, 64% have them outside (restaurants, etc), and 36% at home

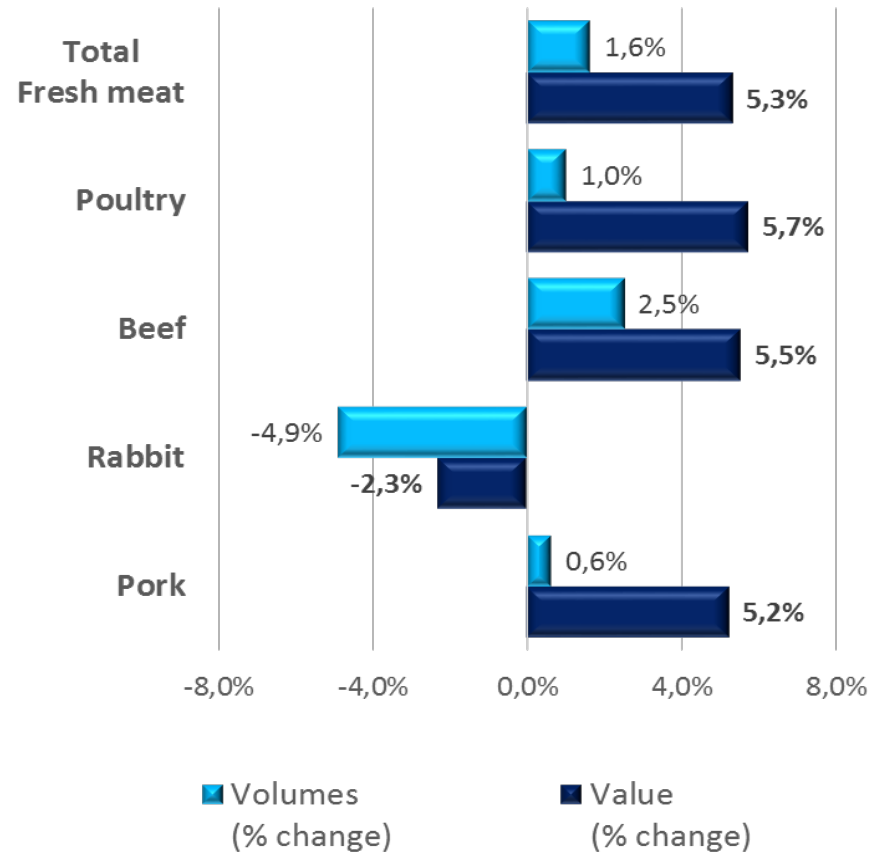


Italy: Household Purchases of Meat

% CHANGE
2016/2017



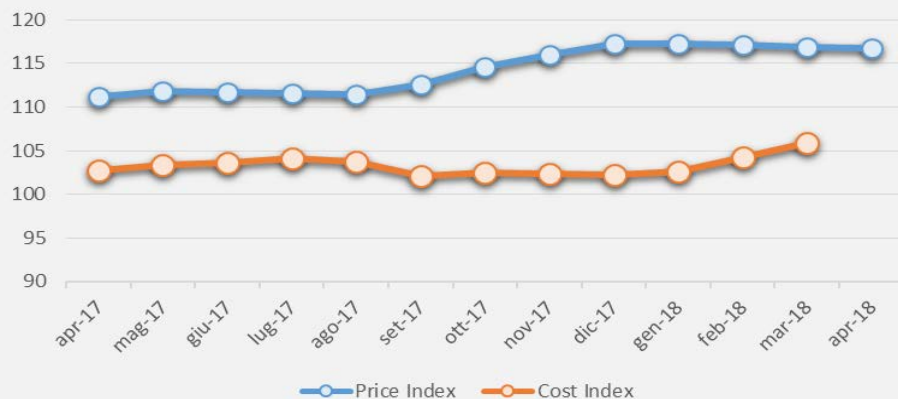
% CHANGE
YTD MARCH18 VS YTD MARCH17



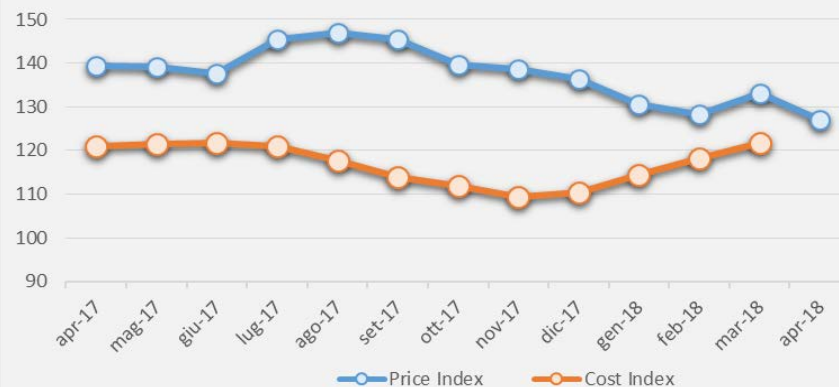
Source: Ismea estimates based on Nielsen data

Italy: Price and Cost Indices (2010=100)

BEEF MEAT



PORK MEAT and SALUMI



POULTRY MEAT



RABBIT MEAT



Italy: fresh beef data

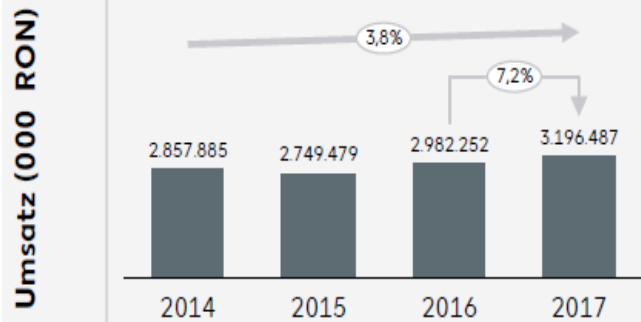
	2017		% Change 2016/2017	% Change 2013/2016
Penetration index*	61%	Purchases (<i>Volumes</i>)	+1.7%	-18%
Average purchase per capita	0.83 Kg	Purchases (<i>Value</i>)	+3.4%	-17%
		Purchases with sales promotion	+2.2%	-4%
		Number of purchases (52 weeks)	+2%	-17%

* Defined as the ratio of the number of households who have purchased fresh beef at least once over the period to the total number of households in the panel

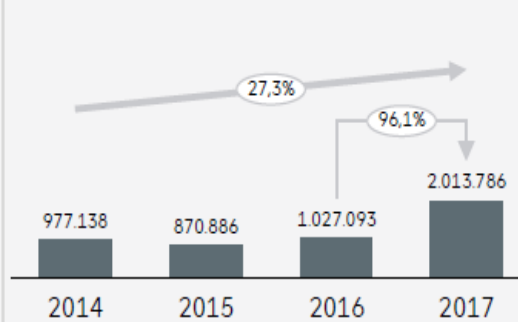
Source: Ismea estimates based on Nielsen data

Romania: meat sales

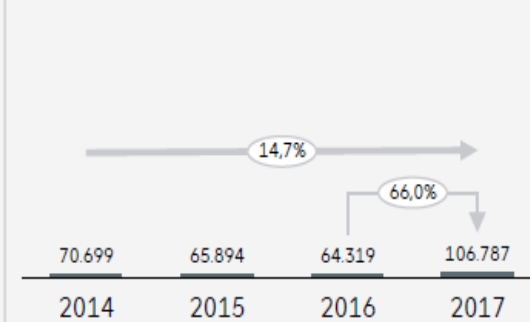
Meat (excl. poultry)



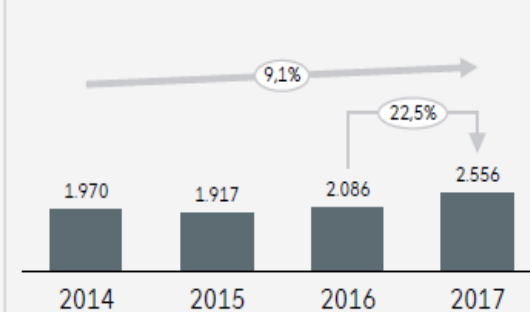
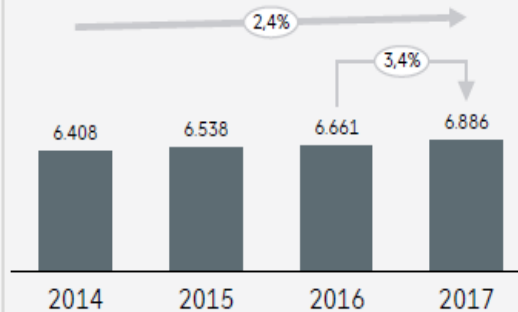
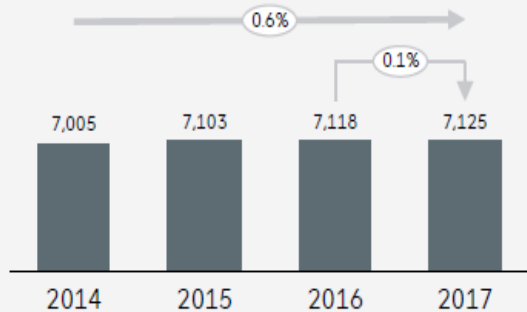
Pork



Beef

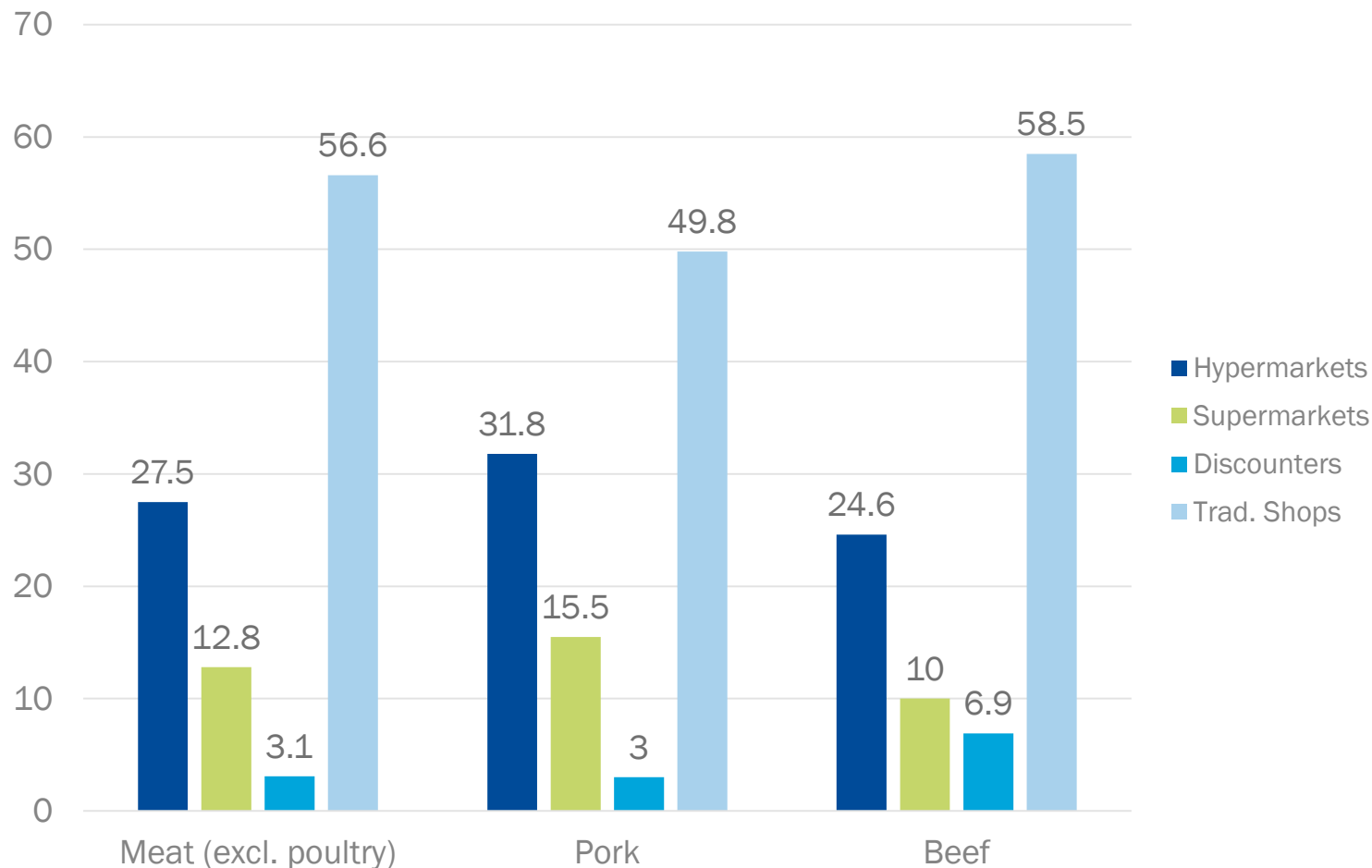


Käufer (000 abs.)

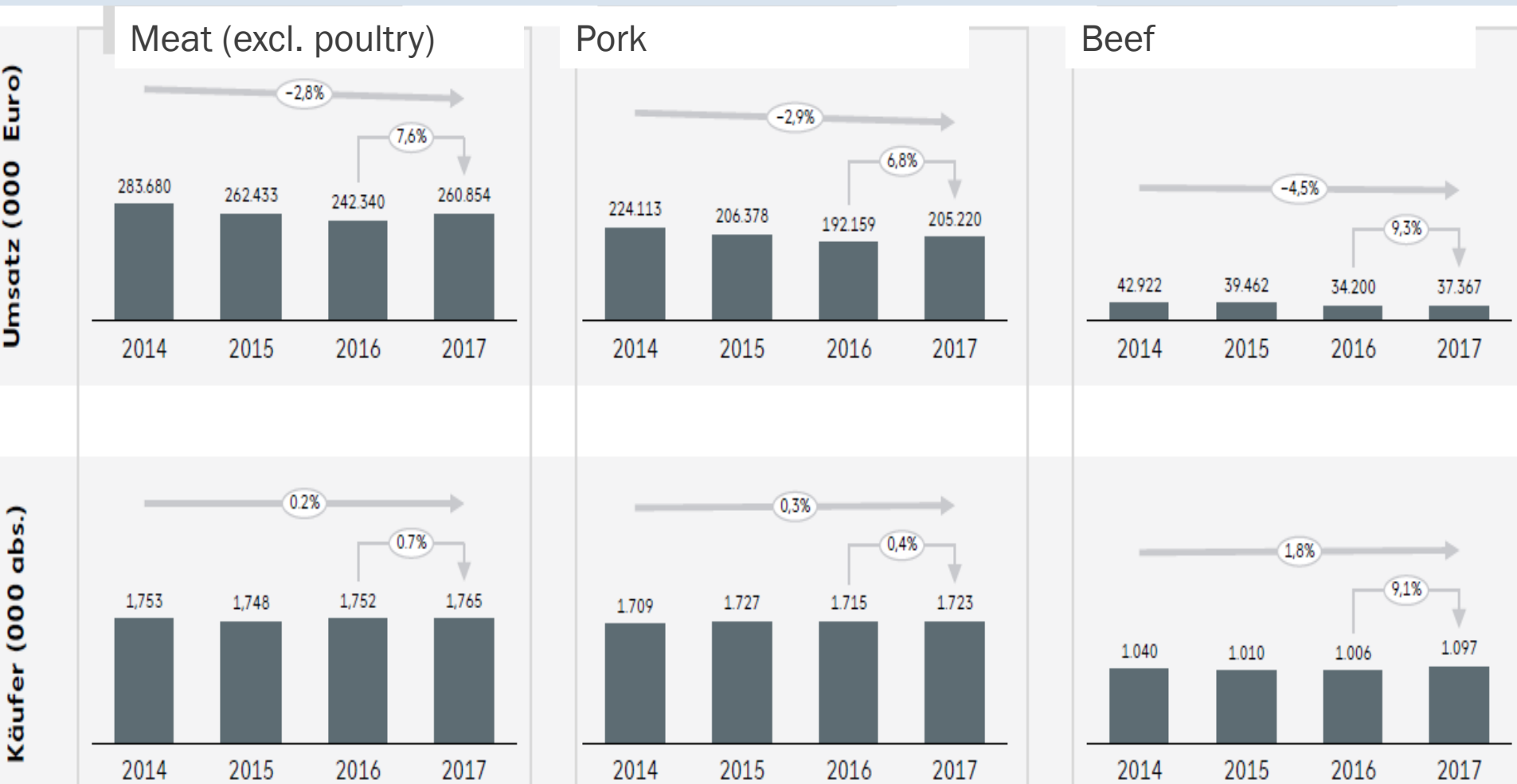


Source: GfK

Romania: meat sales by distribution channel, %

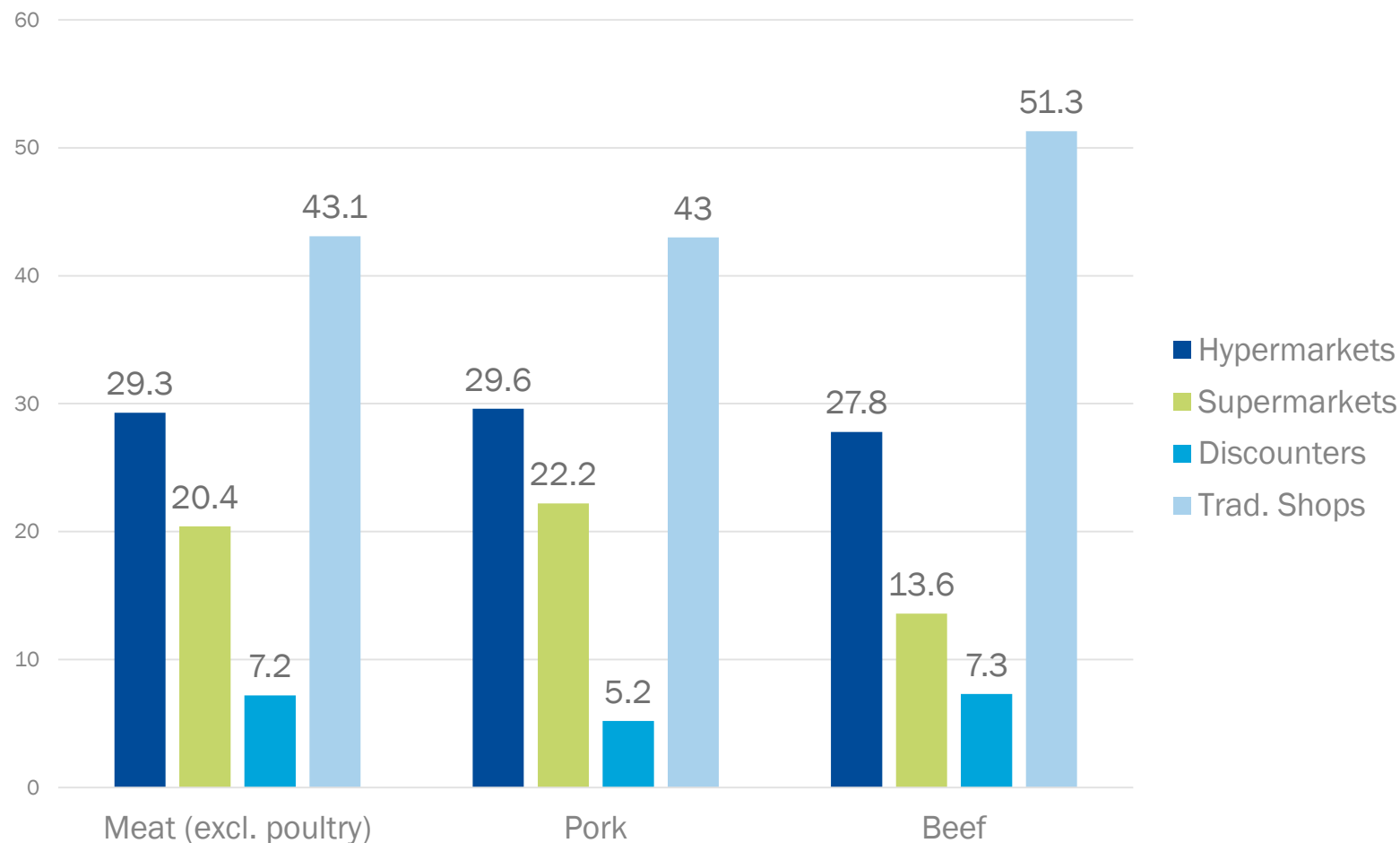


Slovakia: meat sales



Source: GfK

Slovakia: meat sales by distribution channel, %



Source: GfK

Spain

Updated December 2017

- **Fresh meat sales (63% of the market) increased by 4% year-on-year in 2017**
- **Charcuterie (36% of the market) by 3.5%**
- **Ready meals (1.8% of the market) by 10.7%**
- **Total meat consumption has provided a contribution to the overall growth of food products of 20%**

Source: Nielsen Market Track

Spain

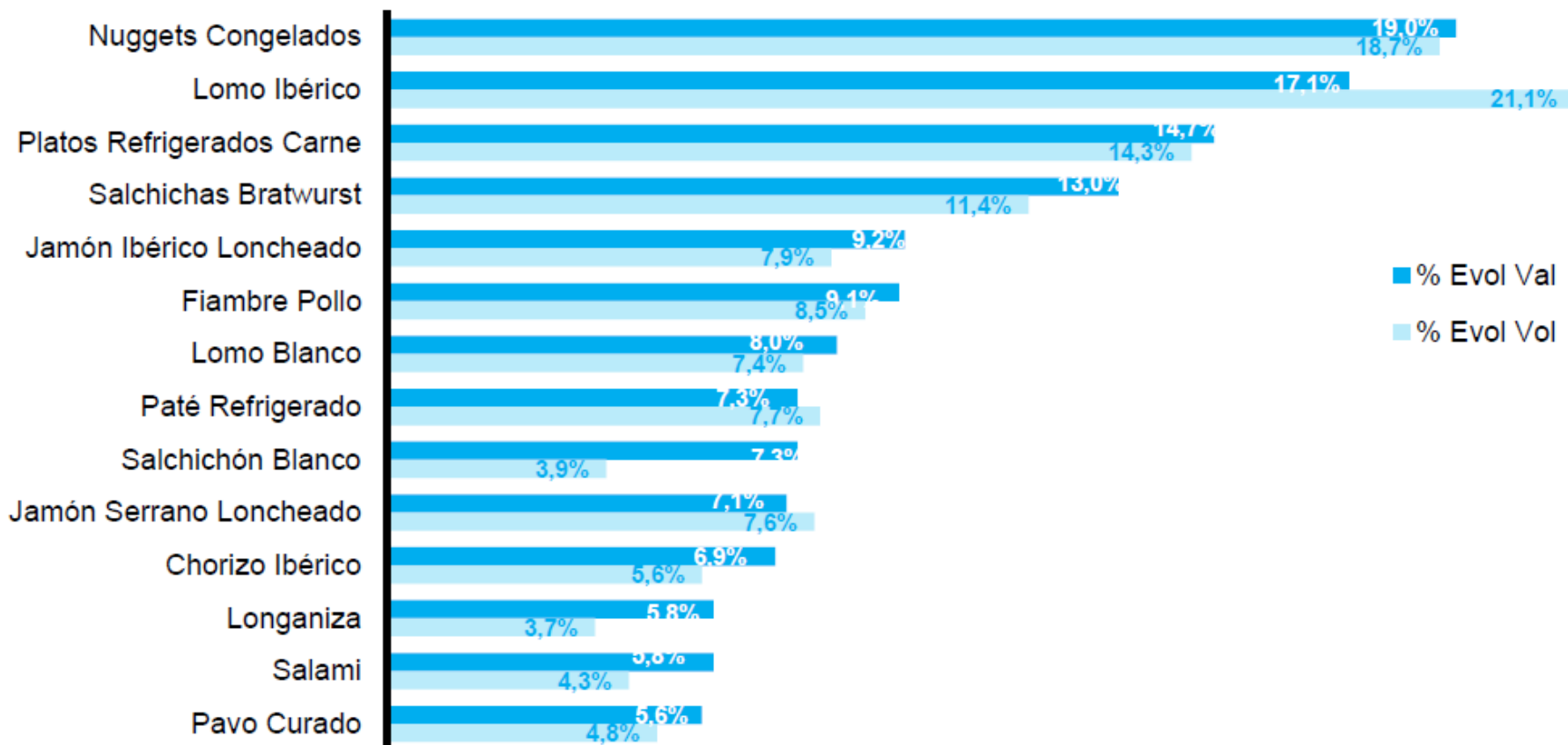
Updated December 2017

		VALOR	VOLUMEN	PRECIO CESTA
TOTAL FRESCOS		+3,5%	+0,6%	+2,8%
	CARNE	+3,9%	+0,4%	+3,5%
	FRUTA	+5,2%	+1,1%	+4,1%
	VERDURAS	+6,3%	+1,9%	+4,3%
	PESCADO	+0,1%	-5,4%	+5,8%
	PAN	+0,4%	-1,3%	+1,7%
	HUEVOS	+5,0%	+4,2%	+0,7%

Source: Nielsen Market Track

Spain

Updated December 2017



Source: Nielsen Market Track

United Kingdom: beef

Period ending 22nd April 2018

Fresh & Frozen Beef

	4 weeks ended: 22nd April 2018	12 weeks ended: 22nd April 2018	52 weeks ended: 22nd April 2018
Expenditure (£ million)	167.9	543.2	2,236.9
annual change %	-0.5	+0.0	+0.6
Volume (tonnes)	21,889	70,086	285,060
annual change %	-0.9	+0.3	-1.3
Average price (£/kg)	7.67	7.75	7.85
Penetration (%)	54.3	74.2	86.3

Annual volume change %

	4 weeks ended: 22nd April 2018	12 weeks ended: 22nd April 2018	52 weeks ended: 22nd April 2018
Fresh & frozen beef	-0.9	+0.3	-1.3
- Roasting	-16.4	-0.5	-8.2
- Stewing	+0.8	+3.6	-1.9
- Frying/grilling steak	+3.0	-3.8	-0.6
- Mince	+3.7	+0.5	+0.4
- Marinade	+27.0	+14.8	+16.8
Burgers and grills	-3.9	-1.9	-2.7
Chilled ready meals	+2.9	+1.2	+1.8
Frozen ready meals	-8.1	+0.6	+6.3
Fresh pre-packed hot pies	-11.6	-7.0	+2.1
Fresh pre-packed pasties	-14.1	+0.4	+7.4
Frozen pies/puddings	-17.3	-7.9	-0.5

Please note Kantar data may be revised on a monthly basis.

United Kingdom: pork

Period ending	22nd April 2018		
	4 weeks ended: 22nd April 2018	12 weeks ended: 22nd April 2018	52 weeks ended: 22nd April 2018
Fresh & Frozen Pork			
Expenditure (£ million)	53.2	171.4	749.4
annual change %	-3.2	-0.3	+3.6
Volume (tonnes)	11,168	36,695	158,468
annual change %	-9.4	-4.5	-2.2
Average price (£/kg)	4.77	4.67	4.73
Penetration (%)	29.7	50.1	71.1
Annual volume change %			
	4 weeks ended: 22nd April 2018	12 weeks ended: 22nd April 2018	52 weeks ended: 22nd April 2018
Fresh & frozen pork	-9.4	-4.5	-2.2
- Belly	-16.3	-21.3	-13.4
- Chops/Steaks	-1.7	+0.5	+0.1
- Leg Roasting Joint	-16.7	+18.1	+15.9
- Loin Roasting	-48.2	-32.8	-15.6
- Shoulder Roasting Joint	+0.1	-15.2	-18.1
- Marinades	-4.2	-9.5	-3.8
- Pork Ribs	-7.2	+6.0	+8.7
- Mince	+7.4	+18.4	+23.2
Bacon	-0.9	+1.3	+1.5
Pork Sausages	+0.2	+1.2	+0.2
Fresh PP Pork Pies	+4.5	+6.8	+4.0
Fresh PP Sausage Rolls	-2.5	-5.0	-6.0
Pork Sliced Cooked Meats (incl Ham)	-4.8	-3.2	+0.8
Ready Meals (chilled)	+5.0	+3.9	+3.1

Please note Kantar data may be revised on a monthly basis.

Source: Kantar Worldpanel