



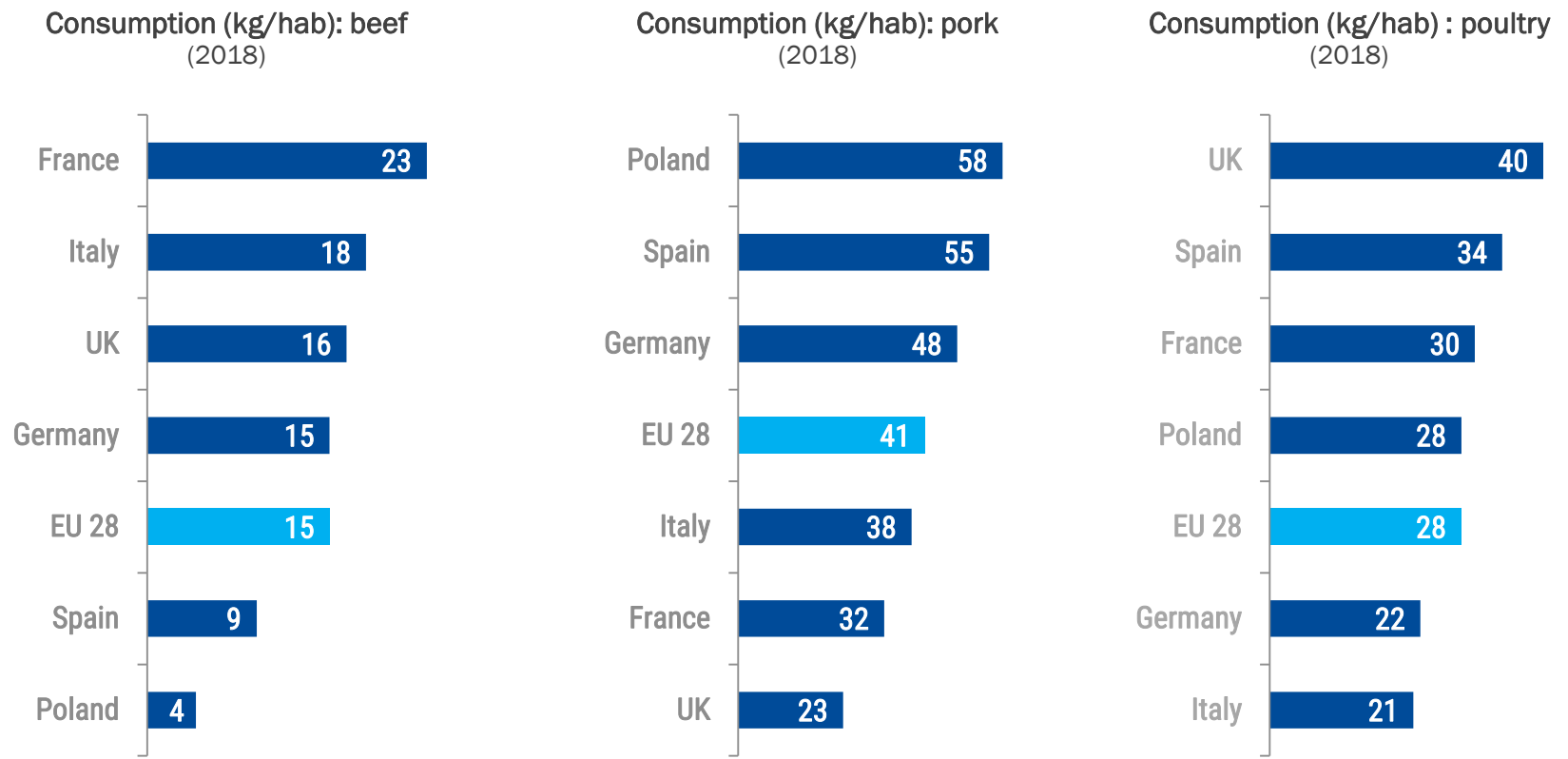
TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

Meat Market Observatory
24 February 2020

Europe

Key Figures

Meat market: different consumption habits in European countries



Sources : FranceAgrimer, Eurostat

Europe

Key trends

A downward trend just about everywhere in Europe - to be put into perspective according to countries and product categories

	Recent trends (household consumption)
France	Still a drop in volumes, all segments are impacted by the trend. The decrease is more pronounced for fresh beef and pork.
Italy	Drop in volume for beef, pork poultry consumption. Increase in volume and value for ham, sausages...
UK	The buzz around “Veganuary” isn’t perhaps being reflected in market performance. According to the latest data from Kantar, volume sales for fresh meat and poultry were flat over the 12 weeks to 26 January and were only down in fresh processed meat and poultry.
Spain	Decrease in volume during the 11 past months (January to November 2019) : fresh meat (-1,3%), frozen meat (-2,8%) et processed meat (-1,1%). But an increase in value : processed meat (+2,8%), fresh meat (+0,3%).
Norway	Meat consumption in Norway in 2018 was 51.9 kilograms per person, down 0.9 kilograms from the previous year, according to a report from meat industry research centre Animalia. The largest decrease was for beef and poultry, which together accounted for 0.7 kilograms of the decrease per person, a decrease of around 3 percent. For sheep and pork, the decline was around 1 percent

Sources : Ismea (Italy), FranceAgrimer, KantarWorldpanel, Ministerio de Agricultura, pesca y alimentacion (Spain)

Europe

Veganism, flexitarianism

400,000 people worldwide signed up to the Veganuary movement this year. Since 2014, the UK-based group has asked people to pledge to eat a vegan diet for the month of January. It said the latest figure compares with 250,000 participants in 2019

More than 400,000 people worldwide signed up for Veganuary this year



Guardian graphic | Source: Veganuary

2019 was a big year for the introduction of alternative meat options,.. but the segment remains confidential compared to the overall meat market

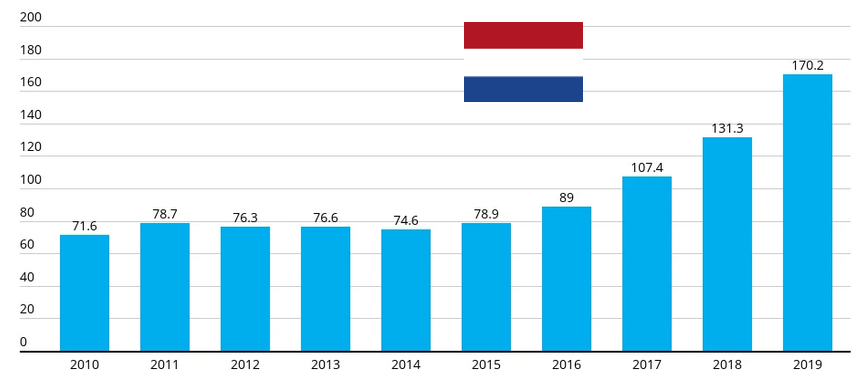


TRAITEUR VÉGÉTAL

82M€ +15%

POPULARITY OF MEAT SUBSTITUTES SKYROCKETS IN THE NETHERLANDS

Growth keeps increasing with highest growth thus far, +30%, seen last year

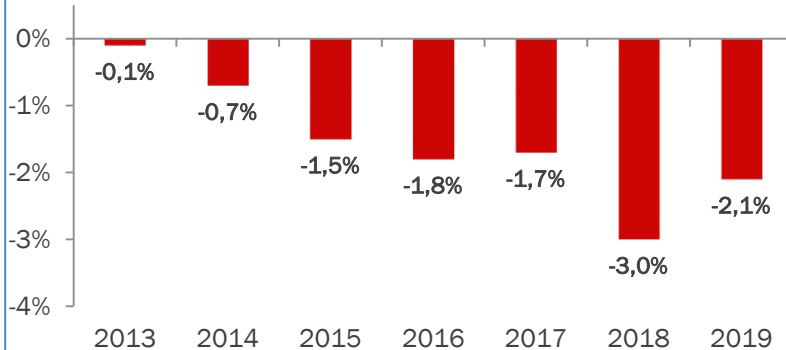


Source: Nielsen. Value growth of meat substitutes in million Euro.

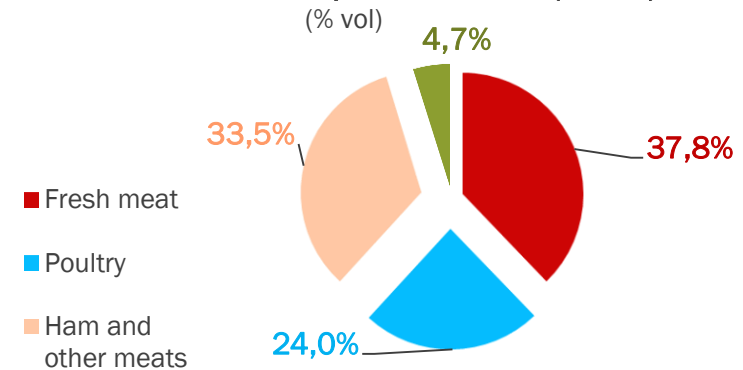
France

Period ending 31 December 2019

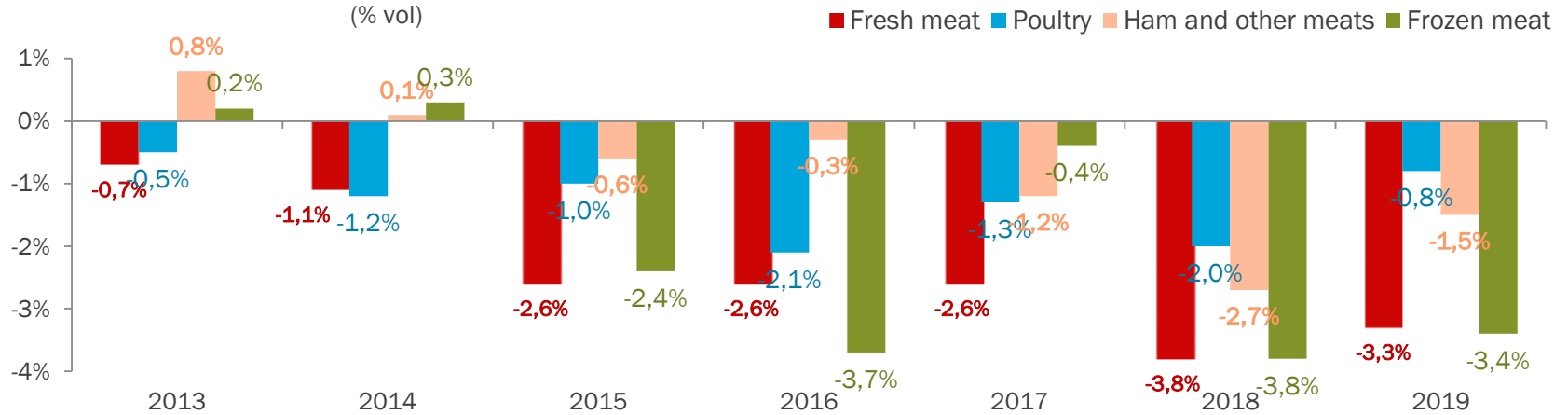
Household consumption of meat
(% vol)



Breakdown :
Household consumption of meat (2019)
(% vol)



Household consumption of meat
(% vol)



Source: Kantar Worldpanel

France

Period ending 31 December 2019

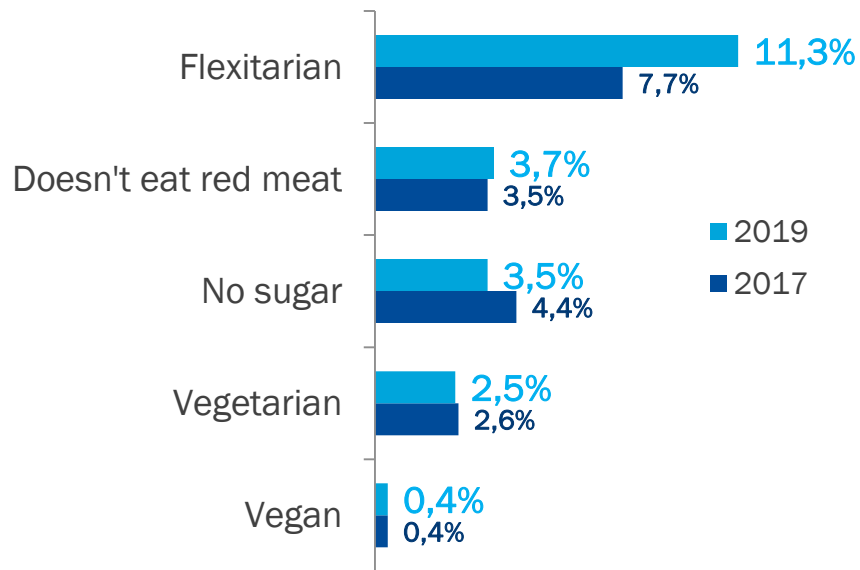
Product category	volumes (% change Year-to-year) (52 weeks)	price (% change Year-to-year) (52 weeks)
Fresh meat	-3,3%	2,2%
Fresh beef	-3,4%	1,9%
Fresh veal	-5,9%	2,2%
Fresh lamb	-6,9%	3,0%
Fresh pork	-5,8%	3,9%
Tripe products	-1,9%	-0,1%
Processed meat, including ground meat	-1,0%	2,1%
Poultry	-0,8%	1,6%
Frozen meat	-3,4%	3,8%
Ham and other meats	-1,5%	2,5%

France

Opinion polls

*One French person
out of 4 follows a specific diet*

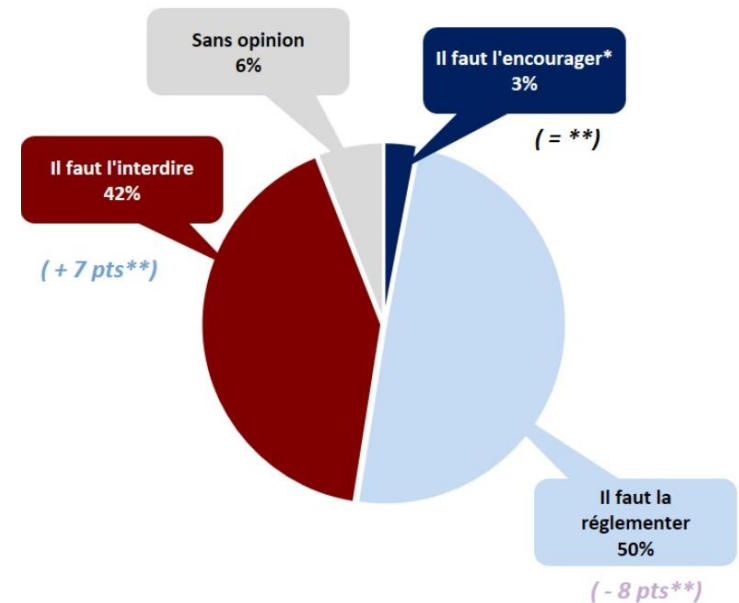
Are you on a special diet ?



Source: L'Obsoco

What is your position with regard
to the intensive breeding sector ?

Quelle est votre position à l'égard de la filière de l'élevage intensif
d'animaux (ferme industrielle, volaille en batteries, etc.) ?
(Base réduite n = 2056)



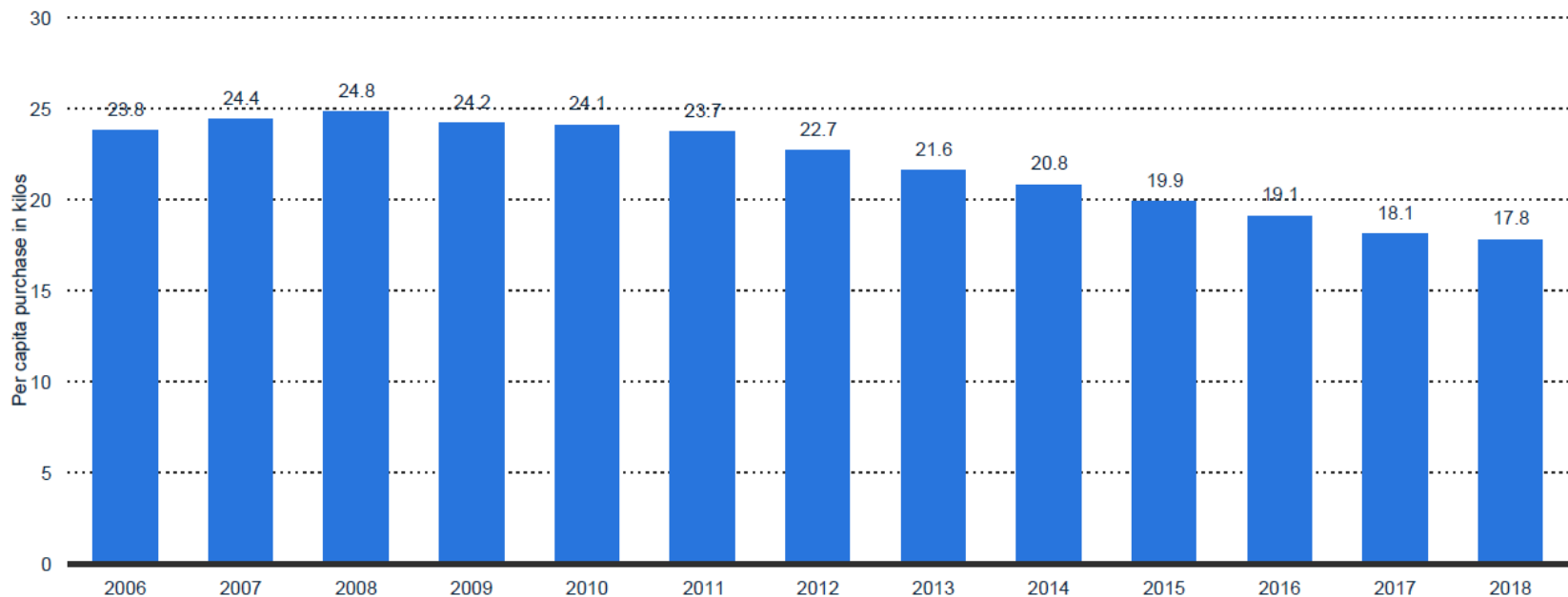
* afin d'améliorer la compétitivité de l'élevage français

** Par rapport à 2017

Belgium

Per capita purchase of meat in Belgium from 2006 to 2018 (in kilos)

Per capita purchase of meat in Belgium 2006-2018



Note: Belgium; 2006 to 2018

Further information regarding this statistic can be found on [page 66](#).

Source(s): GfK; [ID 661468](#)

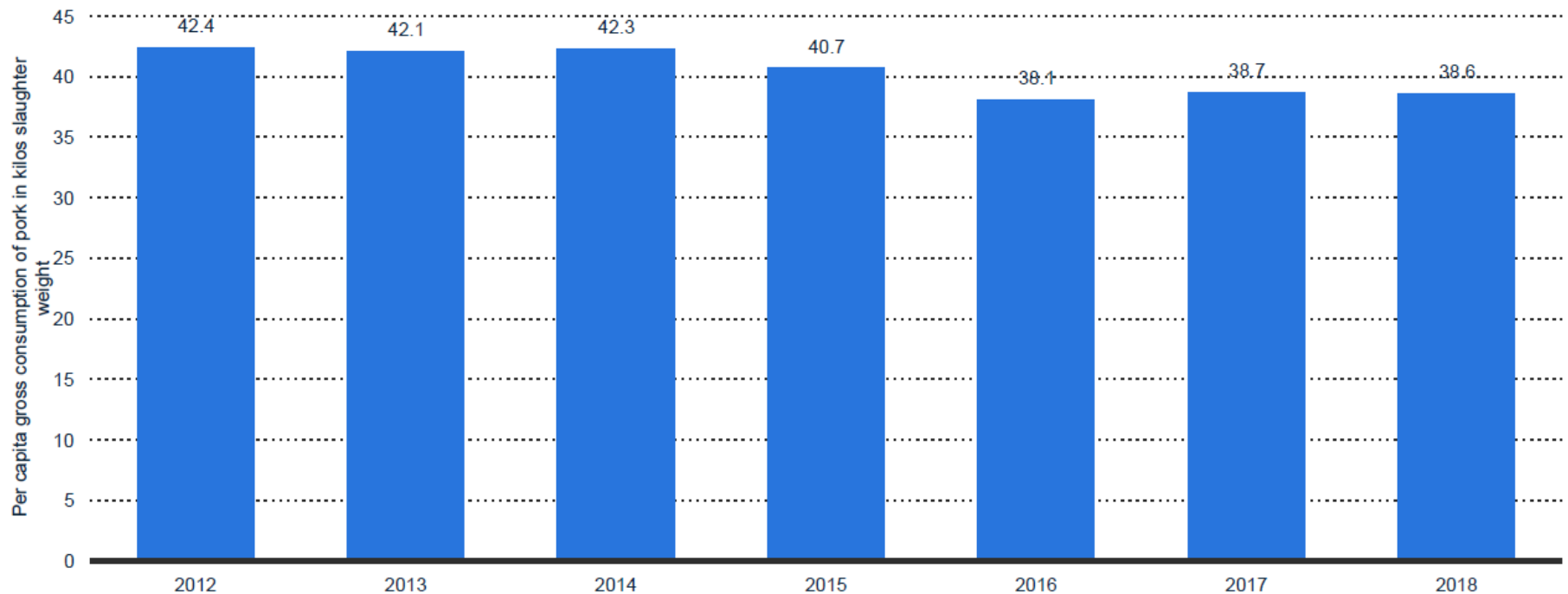
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Meat retail sales **statista**

Belgium

Per capita consumption of pork in Belgium from 2012 to 2018 (in kilos slaughter weight)

Per capita gross consumption of pork in Belgium 2012-2018



Note: Belgium; 2012 to 2018

Further information regarding this statistic can be found on [page 80](#).

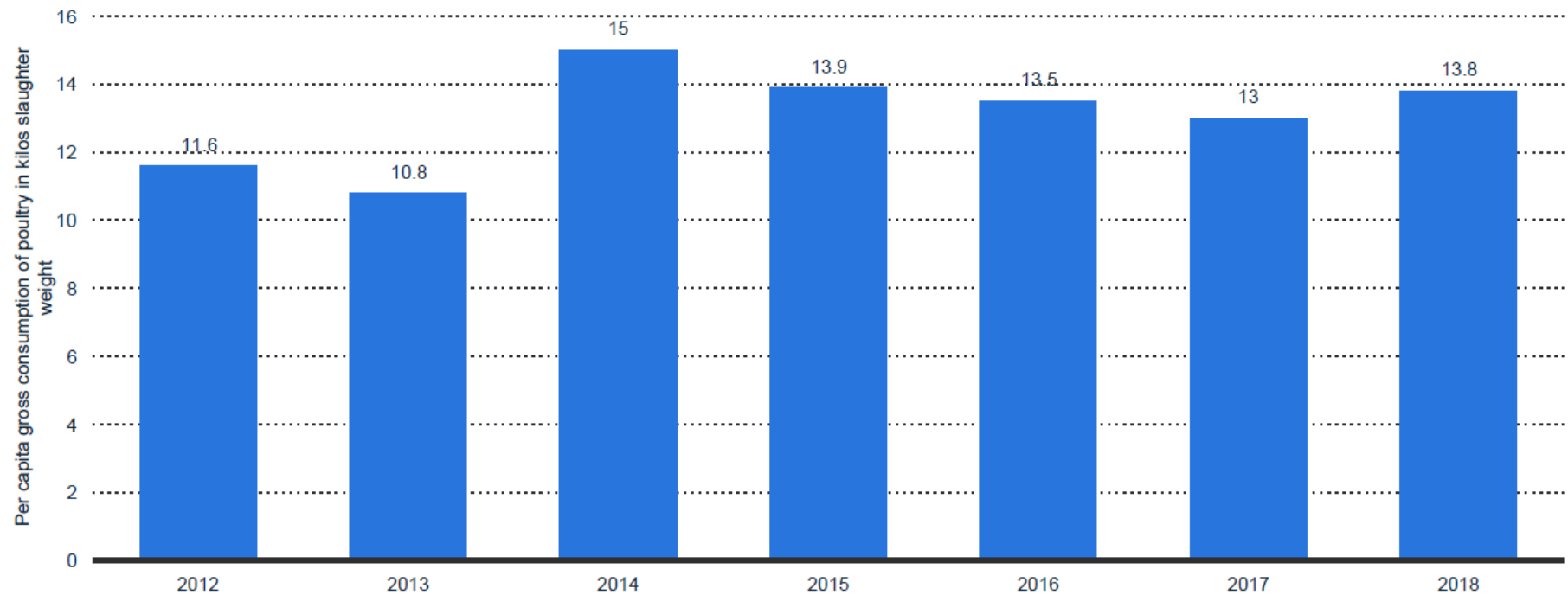
Source(s): Statbel; [JD 622051](#)

Meat types: pork **statista**

Belgium

Per capita gross consumption of poultry in Belgium from 2012 to 2018 (in kilos slaughter weight)

Per capita gross consumption of poultry in Belgium 2012-2018



Note: Belgium; 2012 to 2018

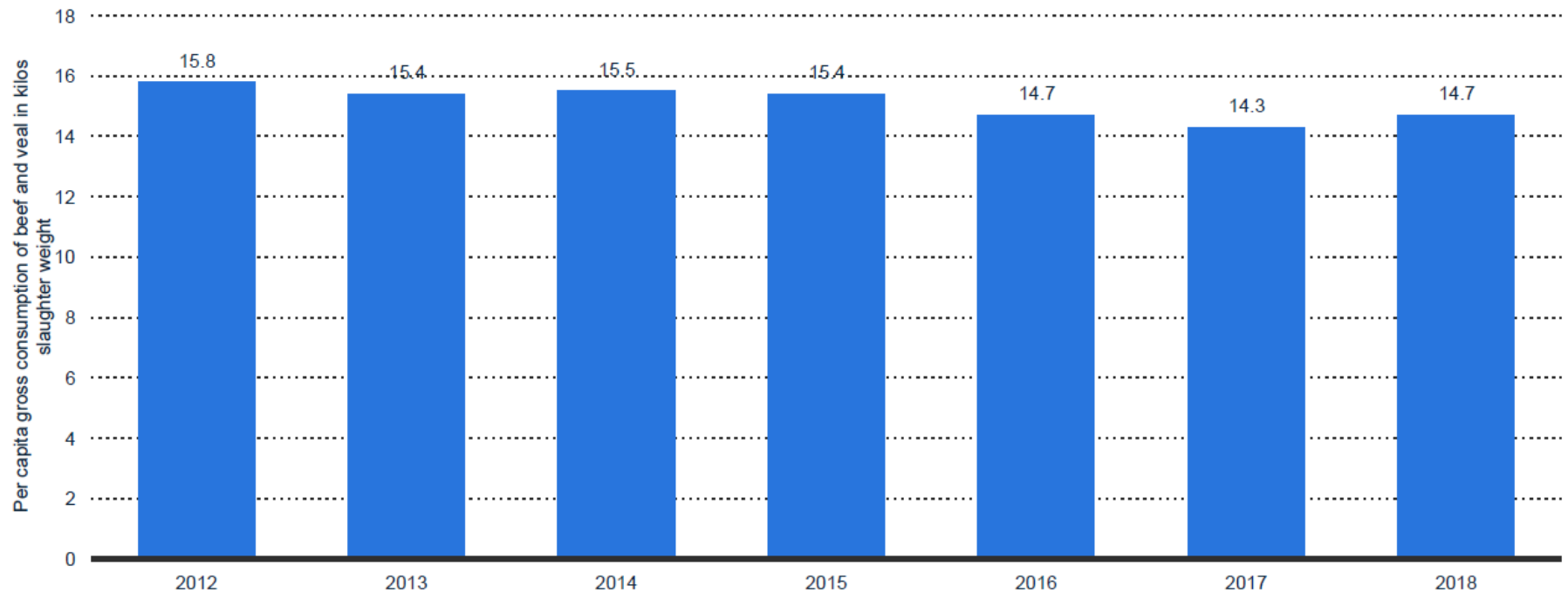
Further information regarding this statistic can be found on [page 83](#).

Source(s): Statbel; [ID 622232](#)

Belgium

Per capita gross consumption of beef and veal in Belgium from 2012 to 2018 (in kilos slaughter weight)

Per capita gross consumption of beef and veal in Belgium 2012-2018



Note: Belgium; 2012 to 2018

Further information regarding this statistic can be found on [page 89](#).

Source(s): Statbel; [JD 622066](#)

Italy

Period: 2019 versus 2018

Total Modern Retail
(only fixed weight)

Product category	VALUE (YTD Dec19 vs. YTD Dec18 - % change)	VOLUME (YTD Dec19 vs. YTD Dec18 - % change)
Preserved Meat	+1,3%	+2,6%
Frozen Meat	-2,6%	-2,7%
Meat (Fixed weight)	+12,5%	+10,1%
Fresh meat	+19,1%	+14,8%
Processed meat - Poultry	+7,5%	+6,7%
Processed meat - Beef	+24,5%	+22,6%
Processed meat - Pork	+10,2%	+7,5%
Processed meat - Horse	+6,3%	+5,4%
Delicatessen (Fixed weight)	+4,7%	+2,3%
Cold cuts	+6,2%	+6,6%
Sliced	+3,6%	+1,8%
Pre-Cooked	-2,4%	-3,3%

Source: Nielsen – Market Track

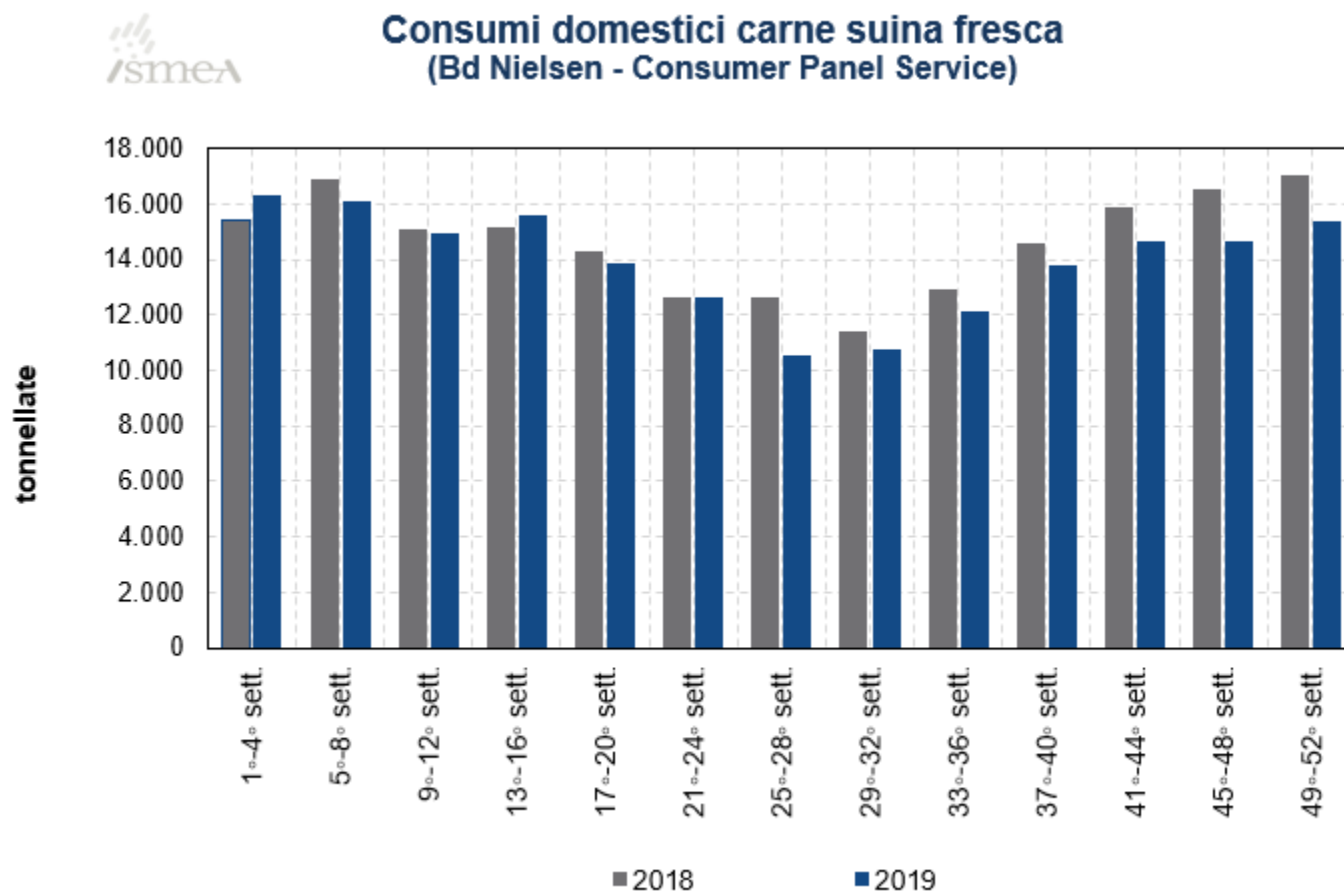
Italy

Period: 2019 versus 2018

Hypermarkets and Supermarkets

Product category	VALUE (YTD Dec19 vs. YTD Dec18 - % change)	VOLUME (YTD Dec19 vs. YTD Dec18 - % change)
Canned MEAT	+0,1%	0,0%
Frozen MEAT	-4,6%	-3,7%
Fresh MEAT	+1,3%	-14,8%
Poultry	+0,1%	-1,4%
Beef	+3,2%	+6,4%
Pork	+0,2%	-15,2%
Sheep	+1,9%	-9,4%
Horse	-1,1%	-9,1%
Other	+1,1%	-21,3%
DELICATESSEN	+2,2%	+2,3%
Cold cuts	+2,1%	+2,2%
Sliced	+1,8%	+2,6%
Pre-Cooked	+10,0%	+1,6%

Source: Nielsen



Fonte: elaborazioni Ismea su dati Nielsen, Consumer Panel Service

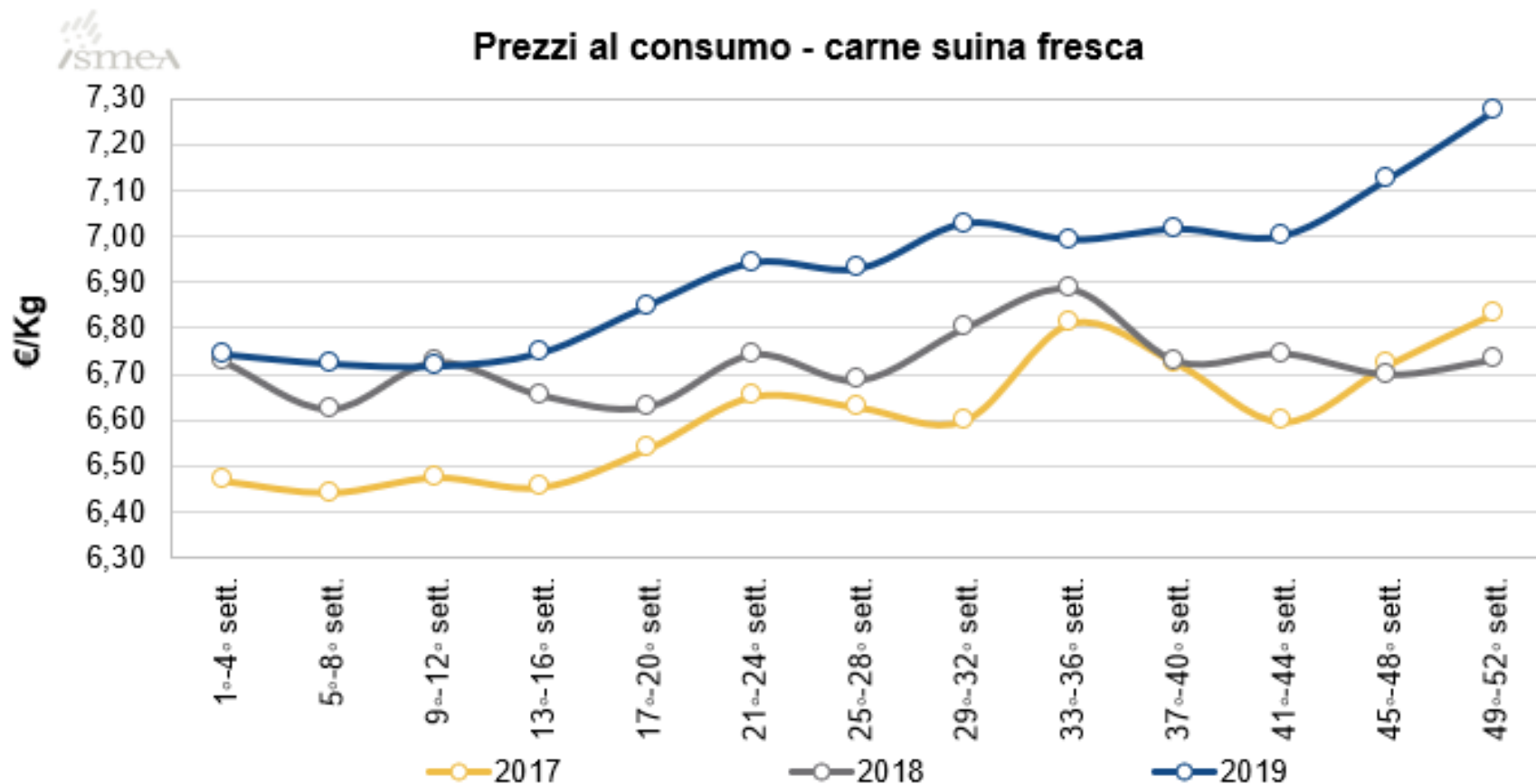
Household purchases of fresh pork and salami

Acquisti domestici di carni suine fresche e salumi	
Periodo cumulato dal 1° gennaio al 29 dicembre 2019	
Quantità (t)	var. %
- Carni fresche	-4,7%
- Totale salumi	-1,2%
- - prosciutto crudo Parma Dop	5,4%
- - prosciutto crudo San Daniele Dop	-5,1%
Valore (000 €)	
- Carni fresche	-1,8%
- Totale salumi	1,0%
- - prosciutto crudo Parma Dop	3,3%
- - prosciutto crudo San Daniele Dop	-4,7%

Fonte: elaborazioni Ismea su dati Nielsen, Consumer Panel Service

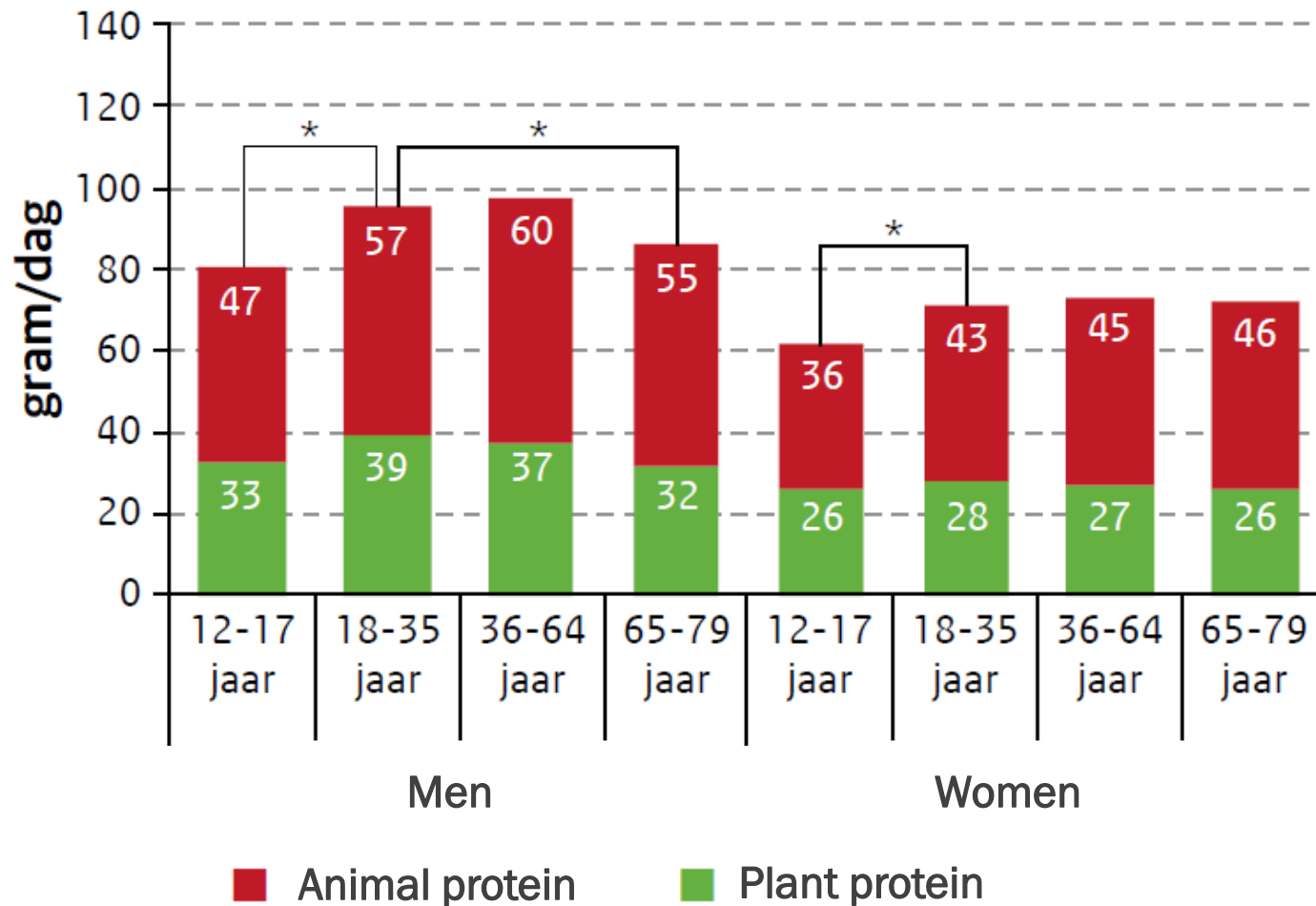
Italy

Consumption prices – fresh pork



Fonte: elaborazioni Ismea su dati Nielsen, Consumer Panel Service

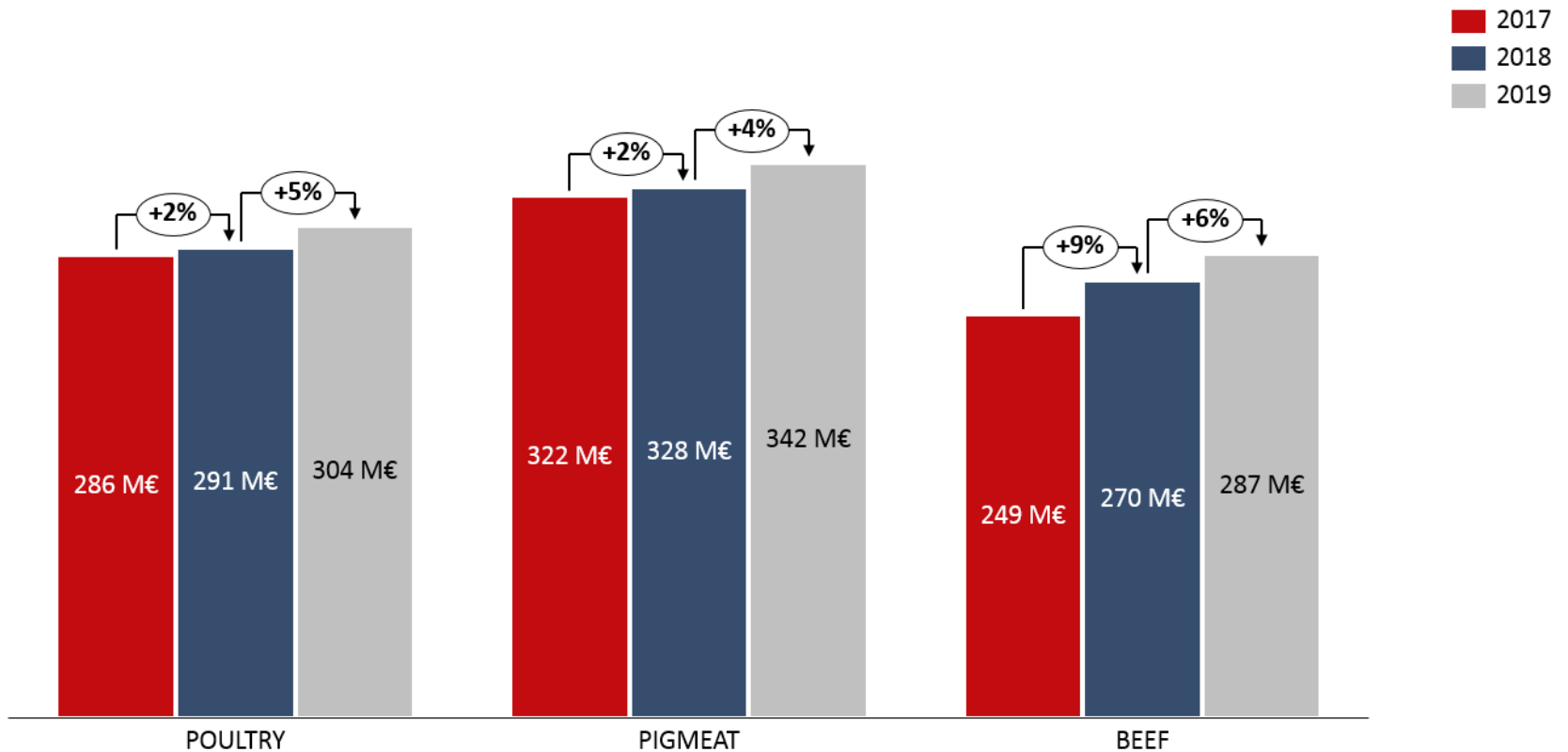
The Netherlands



Source: Ministerie van Volksgezondheid, Welzijn en Sport

Portugal

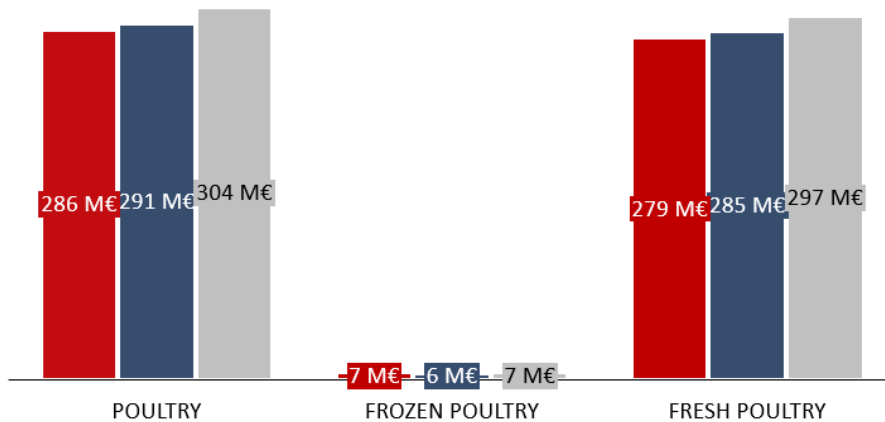
Portuguese Meat Market – Poultry | Pigmeat | Beef



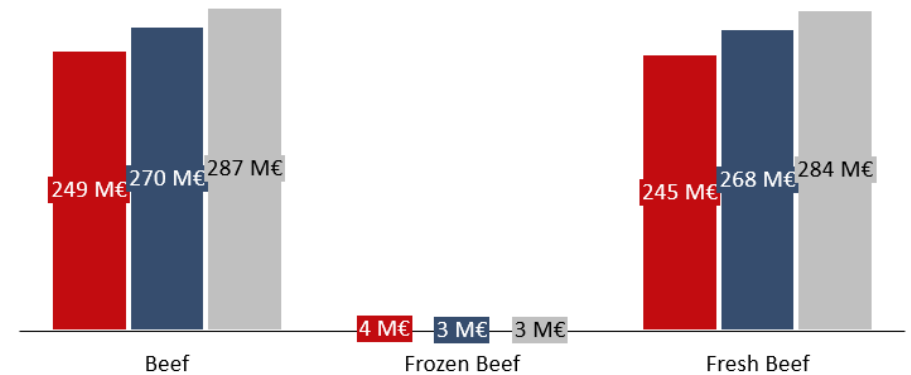
Source: SONAE

Portugal

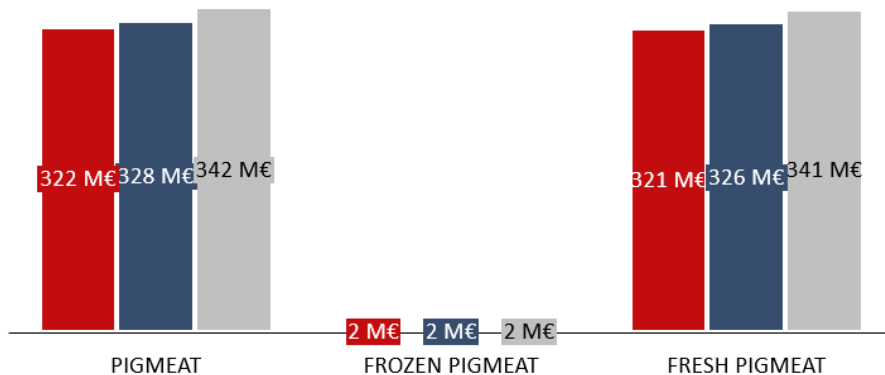
Portuguese Meat Market – Poultry



Portuguese Meat Market – Beef



Portuguese Meat Market – Pigmeat



Source: SONAE

Spain

Total meat consumption

Product category	<u>VALUE</u> (YTD Oct 19 % change)	<u>VOLUME</u> (YTD Oct 19 % change)
Total meat	+0,3%	-1,7%
Fresh meat	-0,4%	-1,8%
Beef	+1%	-0,1%
Poultry	-0,5%	-1,8%
Rabbit	+0,1%	-7,7%
Sheep/Goat	-7,4%	-5,7%
Pigmeat	+0,2%	-2,1%
Frozen meat	+0,0%	-3,5%
Processed meat	+1,8%	-1,5%

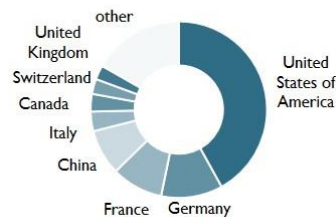
Source: Spanish Ministry of Agriculture

EU is the second largest market for organic food, after the US

ORGANIC RETAIL SALES 2018

World
almost
97 billion €

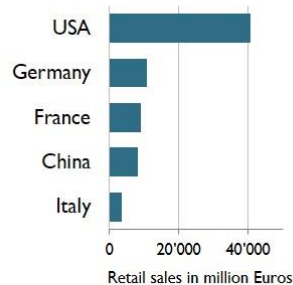
The largest single market is the USA followed by the EU (37.4 billion €) and China. By region, North America has the lead (43.7 billion €), followed by Europe (40.7 billion €) and Asia.



Distribution of retail sales value by country 2018

North America
almost
44 billion €

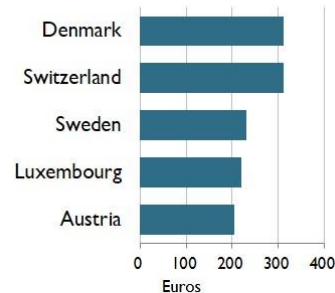
The countries with the largest markets for organic food are the United States (41 billion €), followed by Germany (11 billion €), France (9 billion €) and China (8 billion €).



The five countries with the largest markets for organic food 2018

312€
are spent per
person in
Denmark and
Switzerland

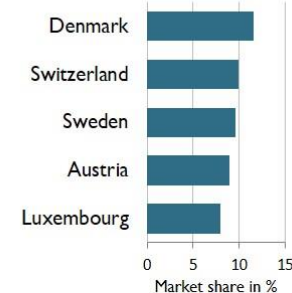
Denmark and Switzerland have the highest per capita consumption worldwide, followed by Sweden and Luxembourg, and Austria.



The five countries with the highest per capita consumption 2018

11.5 %
of the
food market
in Denmark is
organic

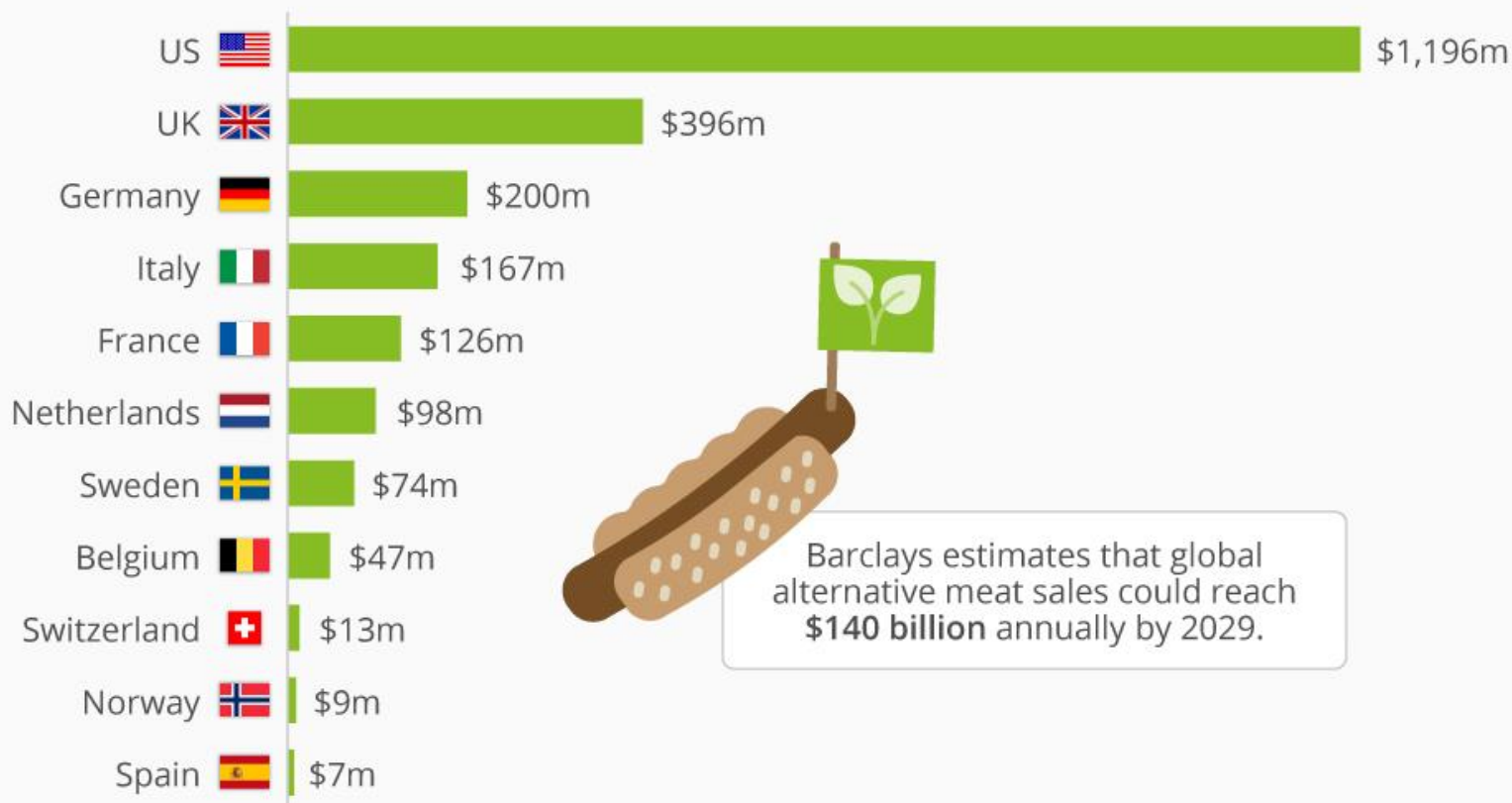
The highest shares the organic market of the total market is in Denmark, followed by Switzerland, Sweden, Austria, and Luxembourg.



The five countries with the highest organic shares of the total market 2018

Alternative meat markets poised for growth

Estimated meat substitute sales in selected countries in 2018



@StatistaCharts Sources: Barclays, Euromonitor

statista



THANK YOU

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