



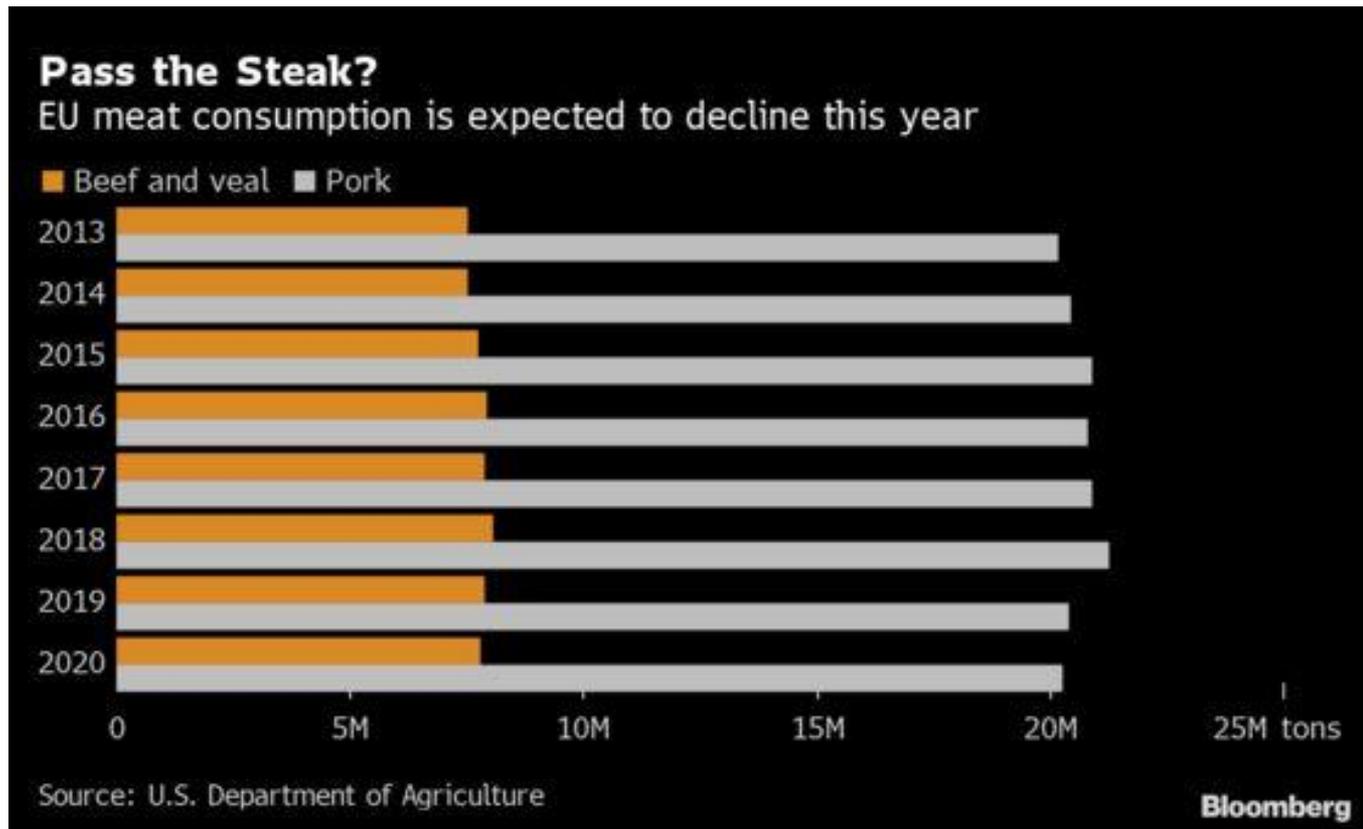
TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

Meat Market Observatory
22 June 2020

Europe

Key trends

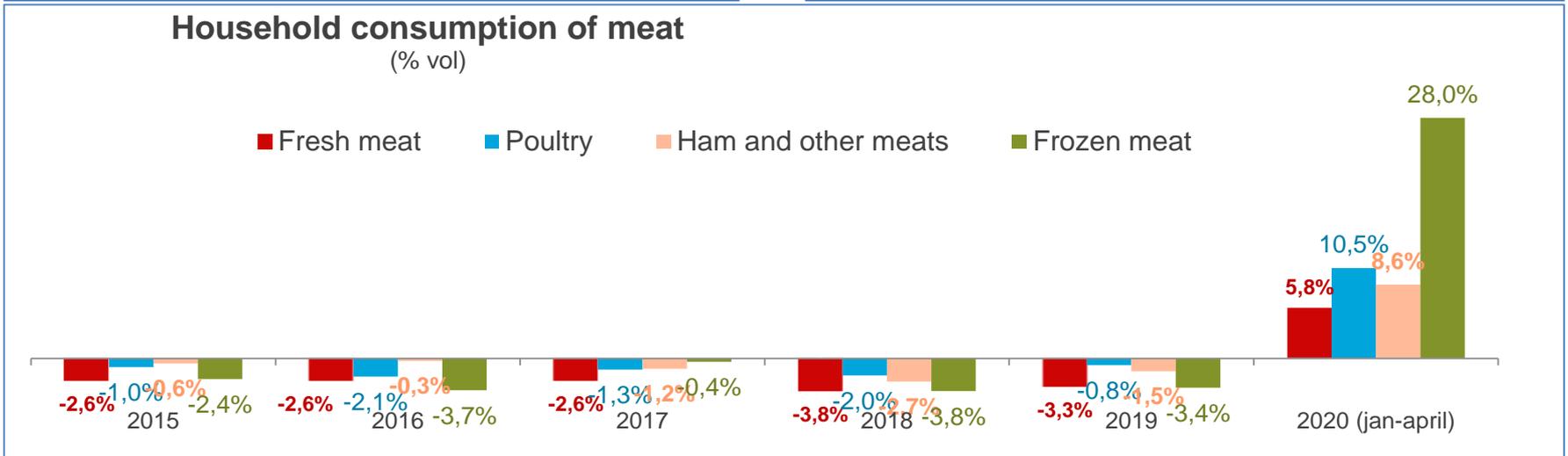
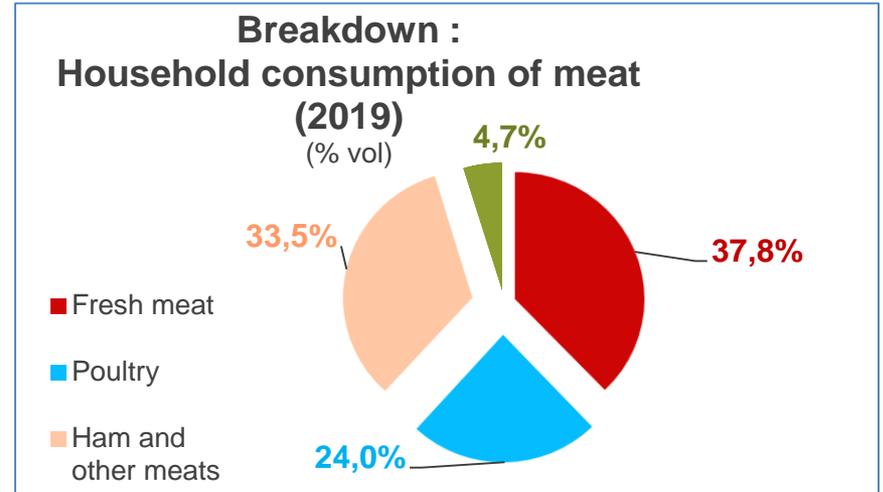
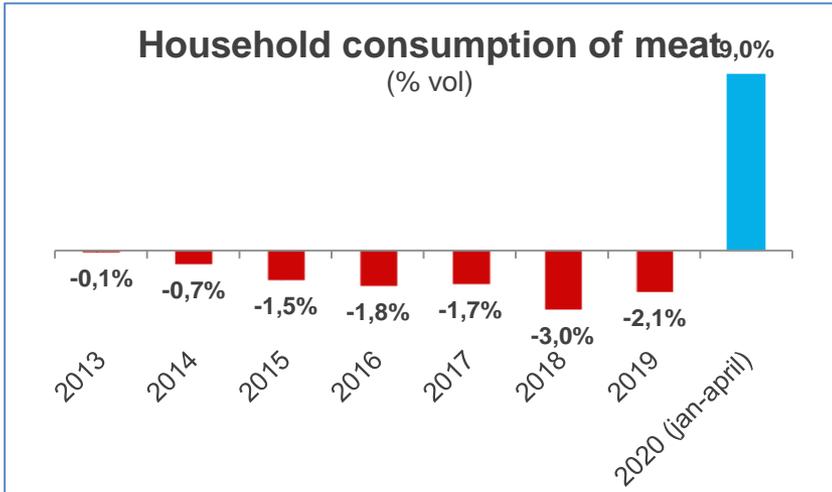
The European Union's pork demand will fall 0.6% to a seven-year low of 20.3 million tons in 2020, with beef and chicken consumption easing to the lowest in several years, according to the US. Department of Agriculture.



Sources : US Department of Agriculture

France

Period ending 30 April 2020



Source: Kantar Worldpanel

France

Period ending 30 April 2020

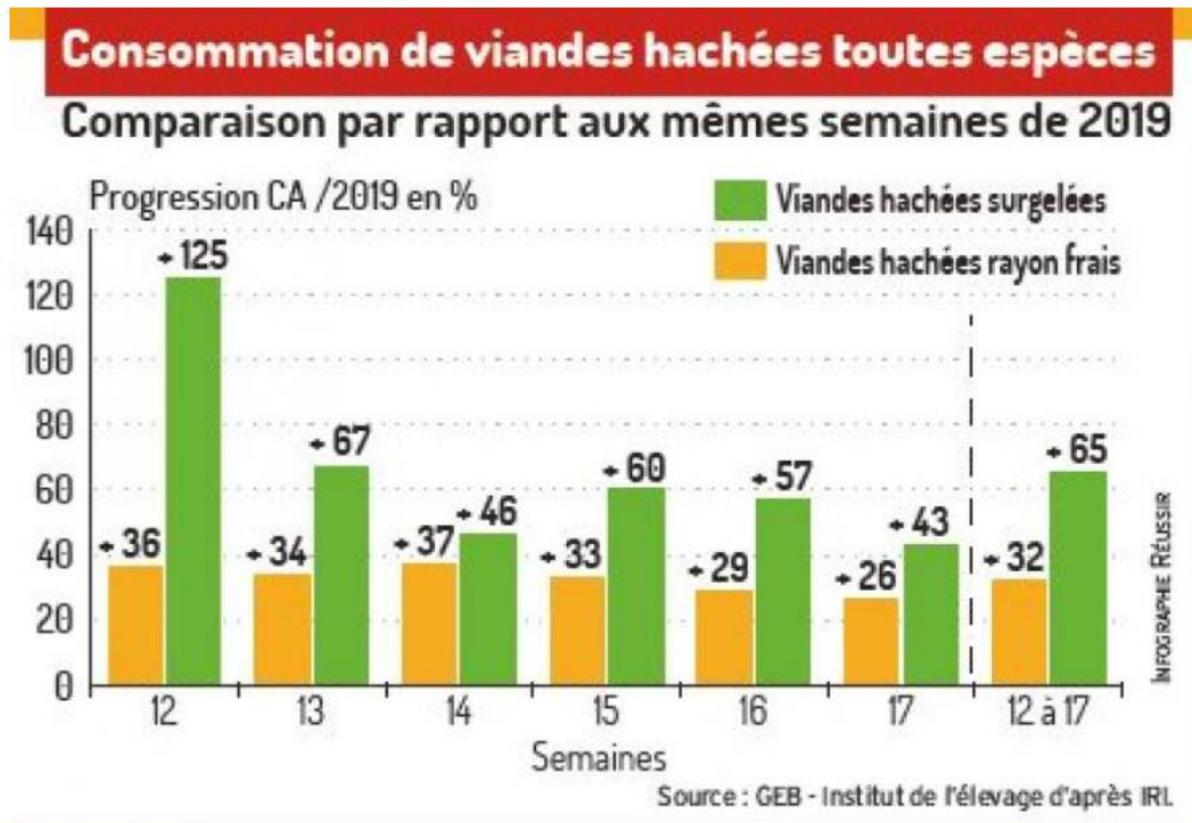
Product category	volumes (% change Year-to-year) (jan-april 2020)	price (% change Year-to-year) (jan-april)
Fresh meat	5,8%	3,5%
Fresh beef	0,4%	2,9%
Fresh veal	4,8%	1,3%
Fresh lamb	-10,7%	3,7%
Fresh pork	5,9%	9,5%
Tripe Products	-8,2%	3,3%
Processed meat, including ground meat	16,1%	4,3%
Poultry	10,5%	1,7%
Frozen Meat	28,0%	0,3%
Ham and other meats	8,6%	5,1%

Source: Kantar Worldpanel

France

Focus on ground beef

Ground beef consumption spiked during the lockdown period (mid-March to the end of April) : +32% in value for the fresh ground beef and +65% for the frozen ground beef.



In the first 4 months of the year, consumption of ground meat increased by 15% in volume terms for fresh meat and 32% for frozen meat,

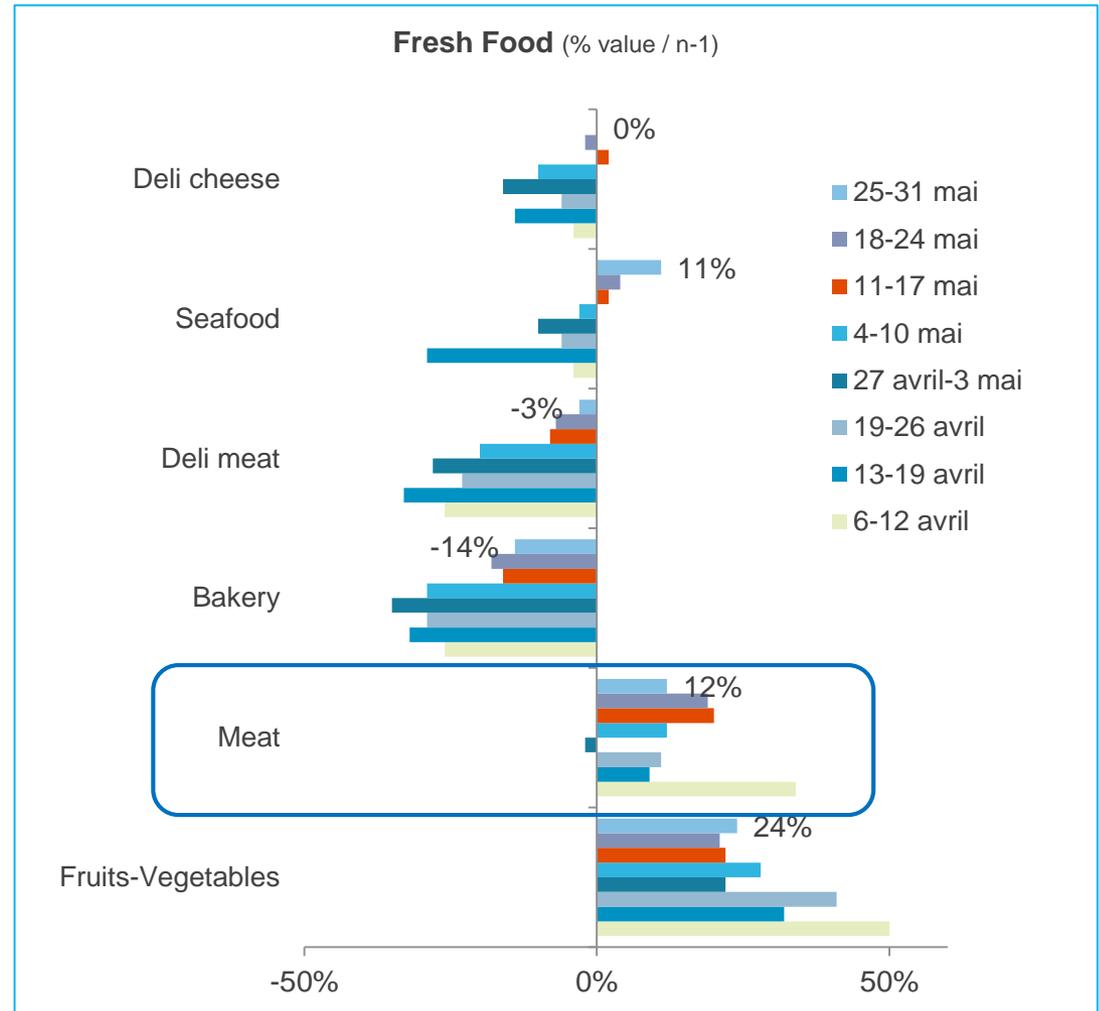
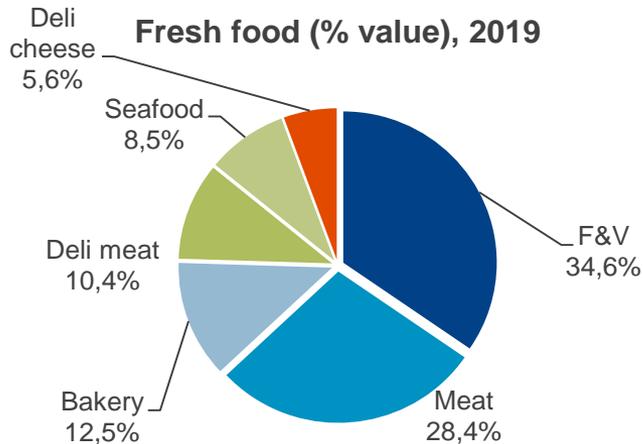
	Vol. jan- avril 2020	Prices jan-avril 2020
Fresh ground beef	15,2%	1,8% (11,08 €/kg)
Frozen ground beef	31,8%	1,9% (6,96 €/kg)

Source: Kantar Worldpanel

France

Focus on fresh food

Meat sales have been positively impacted by the period of containment, in particular by the closure of restaurants and open air markets. It was the same for fruits/vegetables.



Source: IRI (hypermarkets, supermarkets, e-commerce)

France

Opinion polls : Growing demand for local products, French products... and low prices

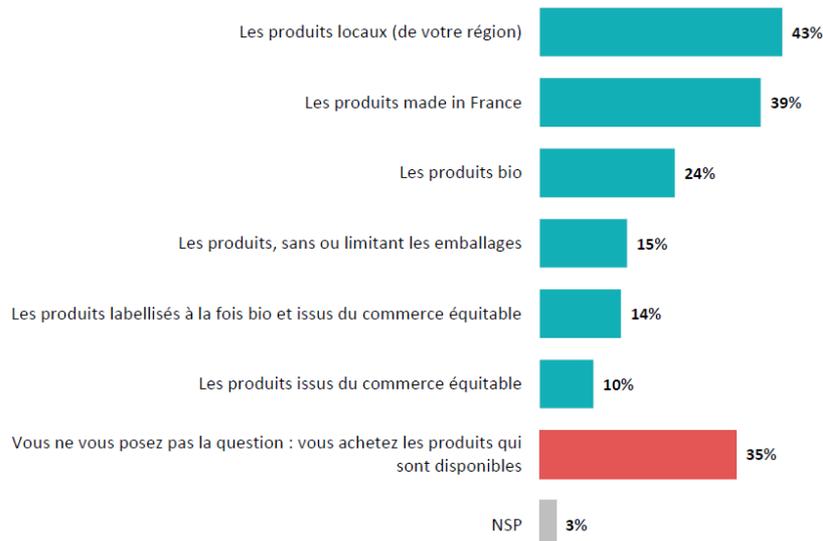
The price remains a key factor in the selection of products: 57% of French people say they have been giving more importance to price since the beginning of the epidemic.

Local products and French products are also increasingly favoured: 43% of those questioned buy more than usual. The same is true for French products: 39% of French people have been buying more since the start of the health crisis.

“ Les produits alimentaires privilégiés durant le confinement

Q. Quand vous achetez des produits alimentaires, lesquels privilégiez-vous aujourd'hui pendant le confinement ?

Plusieurs réponses possibles - Total supérieur à 100%



57%
des Français accordent davantage d'importance au prix depuis la crise du COVID-19

Source : Observatoire E. Leclerc des Nouvelles Consommation – avril 2020

Source : OpinionWay – avril 2020

France

Opinion polls: Red meat is less consumed than dairy products in flexitarian households



Base : enfants dont au moins un parent du foyer déconsomme les produits d'origine animale

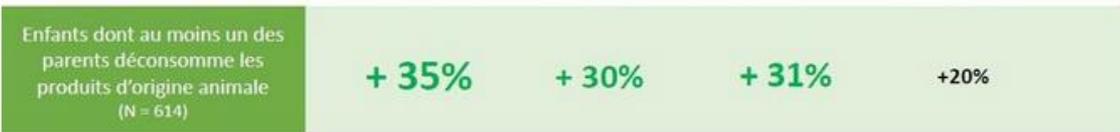


Base enfant: Total (N = 3383) / Enfants dont au moins un des parents déconsomme les produits d'origine animale (N = 1713)
 Q4. Nous allons maintenant parler de la consommation de vos enfants. Pour chacun des produits suivants diriez-vous que leur consommation s'est maintenue, a augmenté, a un peu diminué, a beaucoup diminué, s'est totalement arrêtée – au cours des 5 dernières années ?

In a household with at least one flexitarian parent, 61% of children have increased or maintained their milk consumption over the last 5 years (only 7% drink substitutes such as vegetable juices), 71% for cheese and 75% for yoghurt. On the other hand, for red meat, 72% of children have stopped or decreased their consumption

OpinionWay carried out a focus from 24 April to 4 May 2020. With the increase in meals taken at home and in the preparation of dishes, we note a 35% increase in yoghurt consumption among children whose parents are going vegetarian, a 30% increase for cheese and a 31% increase for milk and 20% for red meat.

Aliments privilégiés pour les enfants pendant le confinement
 % Plus qu'avant le confinement



Source : OpinionWay – Lactel (2019 & 2020)

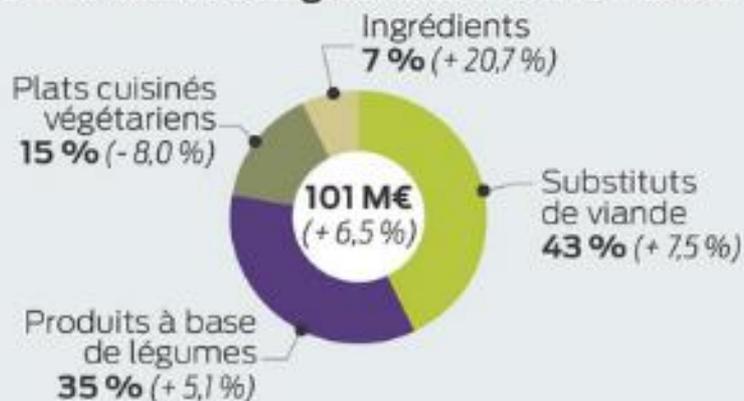
France

Alternative meat markets: the growth rate tends to slow down

The alternative meat market slowed down in 2019. It increased by 6,5% in value, vs more than 20% in 2018.

Segments

Simili-carnés et ingrédients tirent le marché



Parts de marché valeur des segments du traiteur végétal. Source : panel distributeurs – origine fabricants – traiteur végétal en HM-SM + proximi + drive + HD – cumul 12 mois à fin décembre 2019.

Marques

Herta conforte son leadership

Marque	% CA	Évol. / 1 an
Herta	36,4 %	+ 7,4 pts
MDD	23,2 %	- 0,6 pt
Cérééal Bio	9,7 %	+ 1,0 pt
Sojasun	6,9 %	- 1,1 pt
Cérééal Grill	4,5 %	- 0,8 pt
Le Gaulois	2,6 %	- 0,2 pt
Fleury Michon	2,2 %	- 2,8 pts
Bonduelle	0,4 %	- 0,9 pt
Bjorg	0,4 %	- 2,6 pts
Autres	13,7 %	+ 0,6 pt

Parts de marché valeur des fournisseurs du traiteur végétal. Source : panel distributeurs – origine fabricants – traiteur végétal en HM-SM + proximi + drive + HD – cumul 12 mois à fin décembre 2019.

Germany

Meat consumption continues to decrease. The 2020 Nutrition Report shows that:

- 26% of respondents of their survey eat meat every day; in 2015, this figure was 34%;
- Half of the respondents said they have already bought vegetarian or vegan alternatives, with younger people being more open to these options (61% of 14 to 29)
- 55% of respondents identified themselves as flexitarians – meat eaters who occasionally avoid meat
- When asked what is the right solution to a growing population, in terms of nutrition, 79% of respondents said less meat and 51% suggested meat alternatives

Source: Nutrition Report 2020 - <https://www.bmel.de/>

Italy

Meat – 1Q2020 versus 1Q2019

Total Modern Retail (only fixed weight)

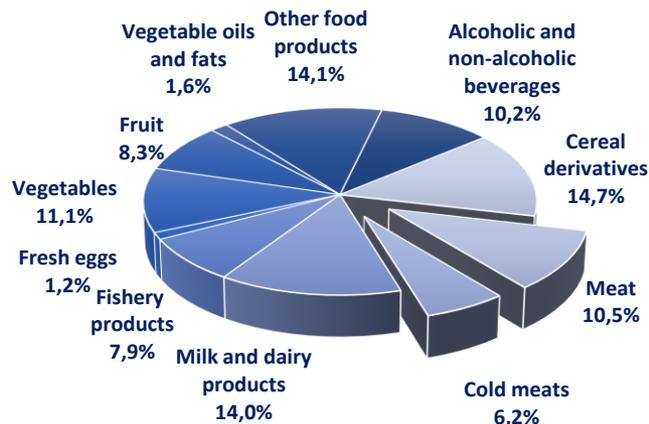
Product category	<u>VALUE</u> (1Q2020 vs. 1Q2019 - % change)	<u>VOLUME</u> (1Q2020 vs. 1Q2019 - % change)
Preserved Meat	+29,6	+25,7
Frozen Meat	+10,8	+8,6
Meat (Fixed weight)	+17,4	+10,0
<i>Fresh meat</i>	+14,5	+4,5
<i>Processed meat - Poultry</i>	+12,8	+8,3
<i>Processed meat - Beef</i>	+29,7	+22,4
<i>Processed meat - Pork</i>	+20,0	+9,2
<i>Processed meat - Horse</i>	+1,4	+2,6
Cold meat (Fixed weight)	+15,0	+9,0
<i>Cold cuts</i>	+13,1	+8,1
<i>Sliced</i>	+22,1	+9,5
<i>Pre-Cooked</i>	+16,0	+10,1

Source: Nielsen – Market Track

Italy - Covid-19 Emergency

Food and drink consumption – Year 2019 and 1Q 2020

Product share 1Q 2020

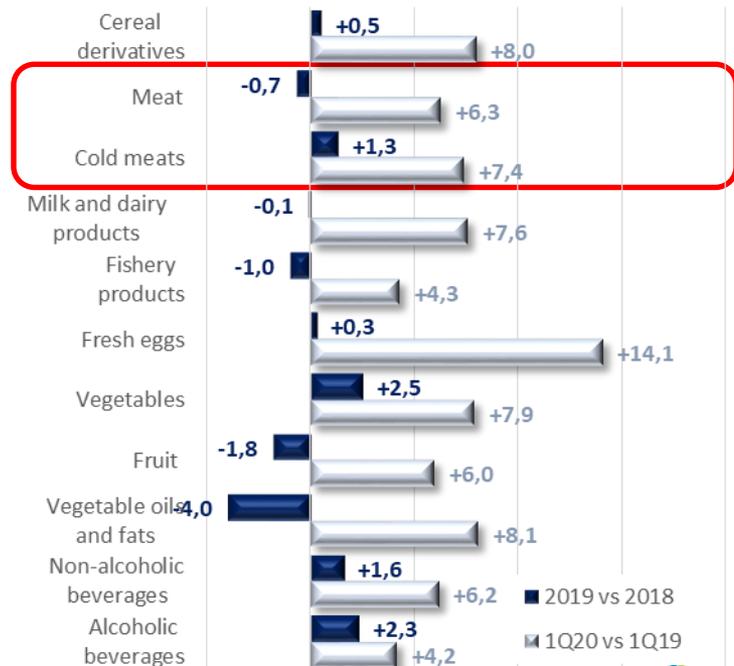


CHANGES IN SHOPPING CART - FOOD:
IN-HOME COOKING AND RISING DEMAND OF PACKAGED, HEALTHY AND LOCAL FOOD

Source: Ismea – Nielsen Consumer Panel

Household purchases Percentage change

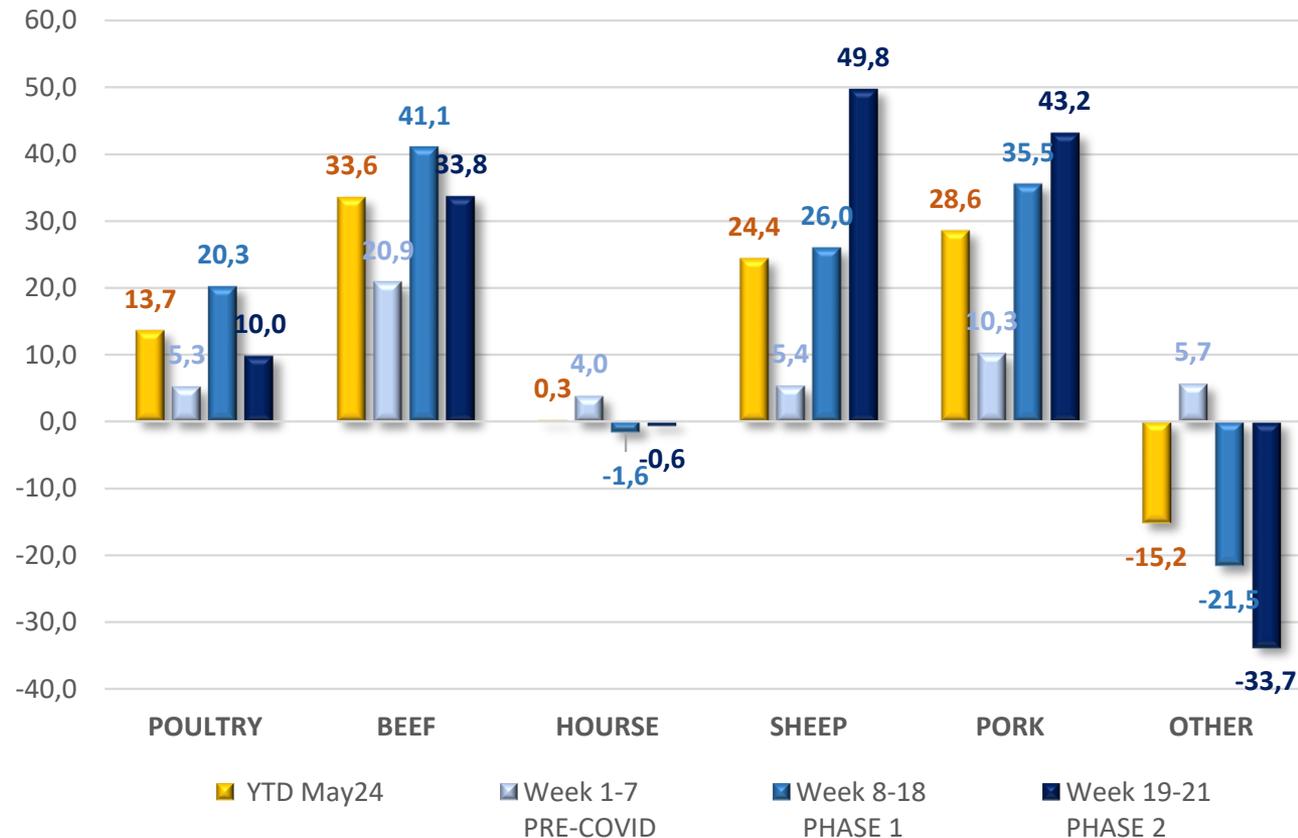
	Var. %	
	2019/18	1° trim 2020/1° trim 2019
Totale agroalimentare	0,4	7,0
Generi alimentari	0,2	7,2
Bevande analcoliche e alcoliche	1,7	5,2



Italy - Covid-19 Emergency

Meat - YTD May 24th

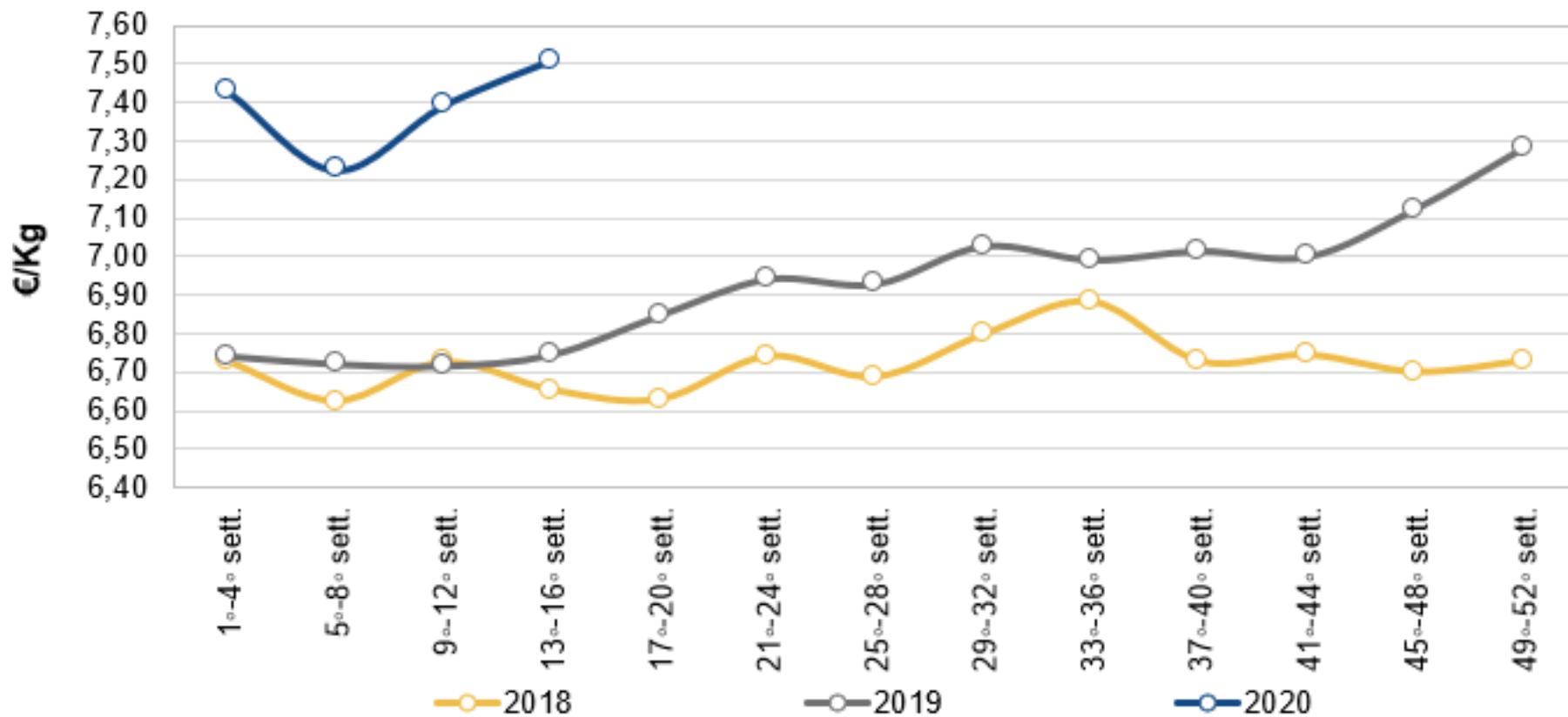
Sales
Percentage change compared with the same period a year



Source: Trade MIS Nielsen

Italy

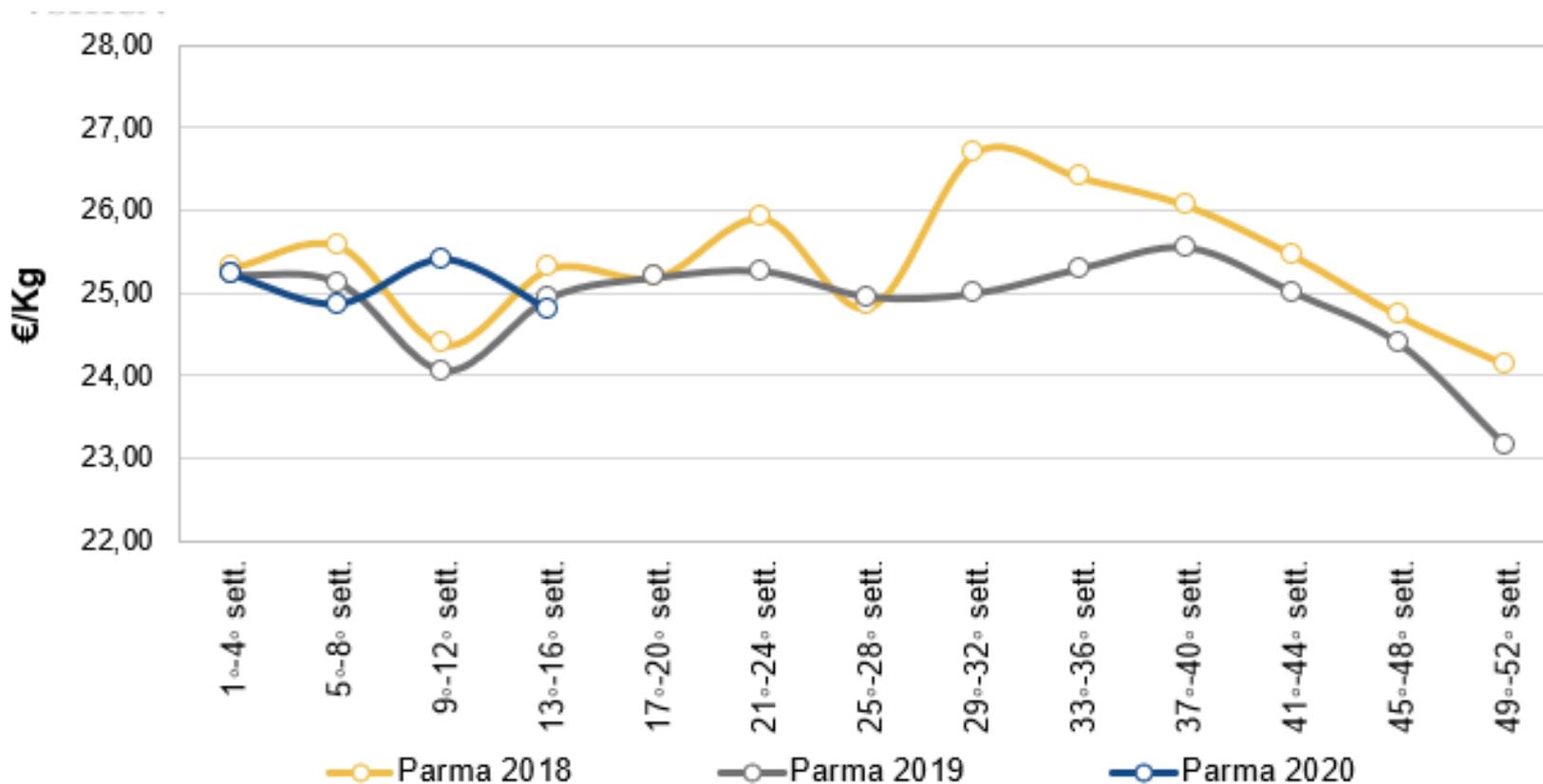
Meat – Fresh pork - Consumption prices



Source: Ismea based on Nielsen data, Consumer Panel Service

Italy

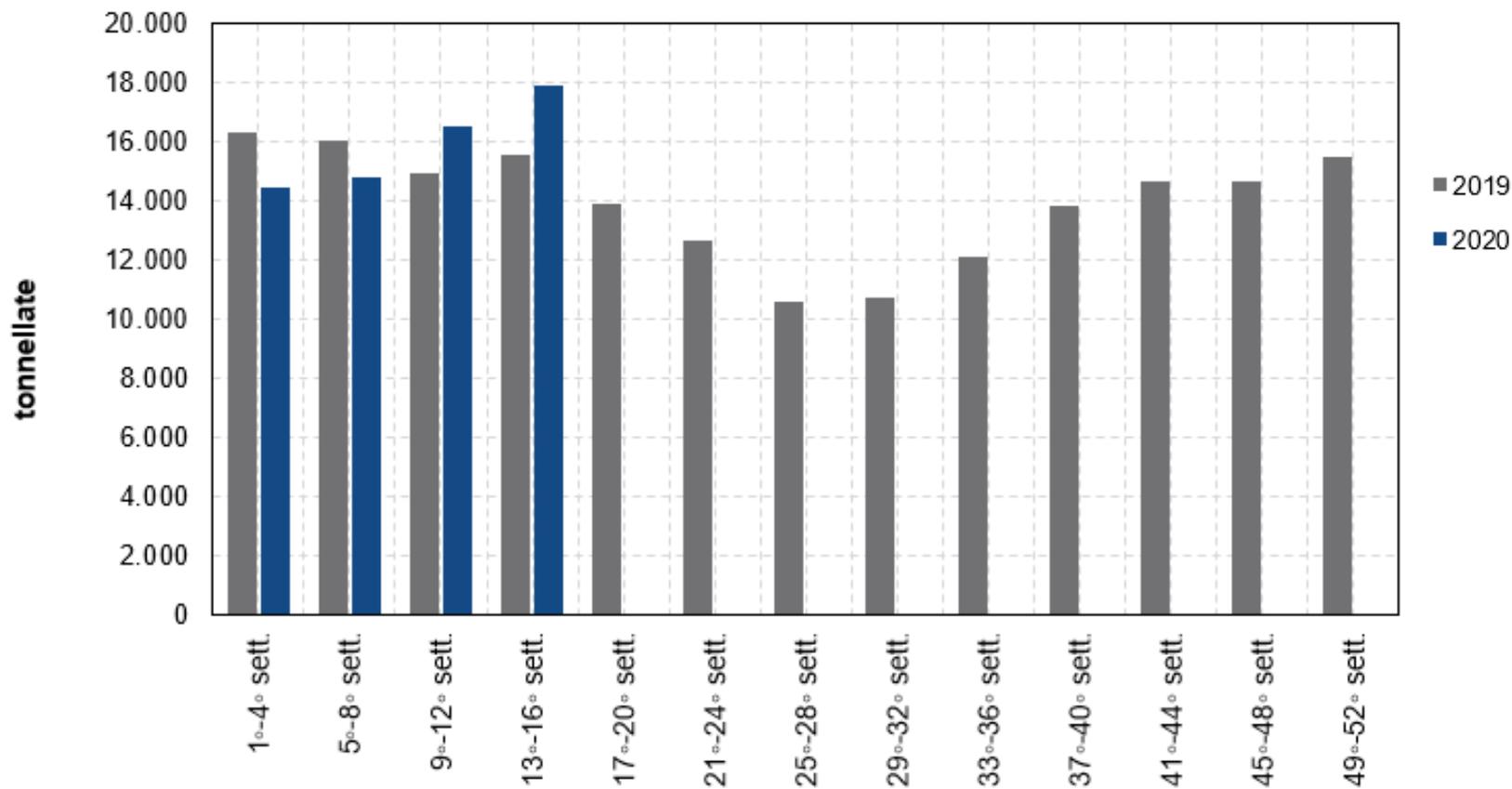
Meat – Prosciutto crudo Dop (Delicatessen) - Consumption prices



Source: Ismea based on Nielsen data, Consumer Panel Service

Italy

Meat – Fresh pork – Domestic Consumption



Source: Ismea based on Nielsen data, Consumer Panel Service

Spain

In April, meat household purchases increased by 30.6% (year on year):

- pork purchases went up by 40%
- chicken purchases increased by 34.7%
- beef purchases increased by 27%
- processed meats by 23.3%
- rabbit meat increased by +14.2%
- sheep/goat meat had a lower growth, with volumes increasing by 5.0%

Total household food purchases increased by 32.5% year-on-year, in April.

Source: https://www.elconfidencial.com/economia/2020-06-08/consumo-hogares-dispara-interanual-abril_2628723/



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