



TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

Meat Market Observatory
22 February 2019

Belgium

Period ending December 2018

Product category	Price evolution (% change, Dec.-18 vs Dec.-17)	Price evolution (% change Jan-Dec 2018 vs Jan- Dec 2017)
Total pigmeat	-0.9%	-0.1%
Delicatessen (salami, ham, prosciutto, etc)	0.3%	1.7%
Processed pork (<i>élaborés de viande</i>)	2.1%	1.8%
Total beef and veal	0.7%	0.3%

Source: COMEOS

France

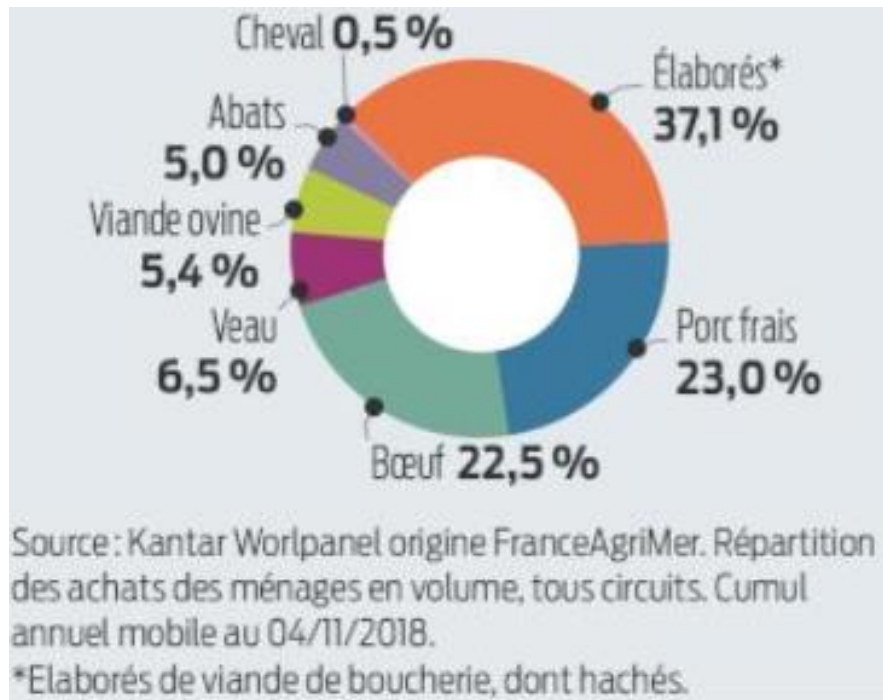
Period ending: 30 December 2018

Product category	Volumes (Year-on-year change, %) (52 weeks)	Price (Year-on-year change, %) (52 weeks)
Fresh meat	-3.8	0.5
Fresh beef	-5.5	0.8
Fresh veal	-6.3	0.0
Fresh lamb	-5.9	0.0
Fresh pork	-4.4	-0.2
Tripe Products	-5.4	-0.2
Poultry	-1.4	1.6
Frozen Meat	-3.8	0.7
Ham and other meats	-2.7	2.1

Source: Kantar Worldpanel

France

Meat product breakdown: processed meat is the first market segment, followed by pork and beef



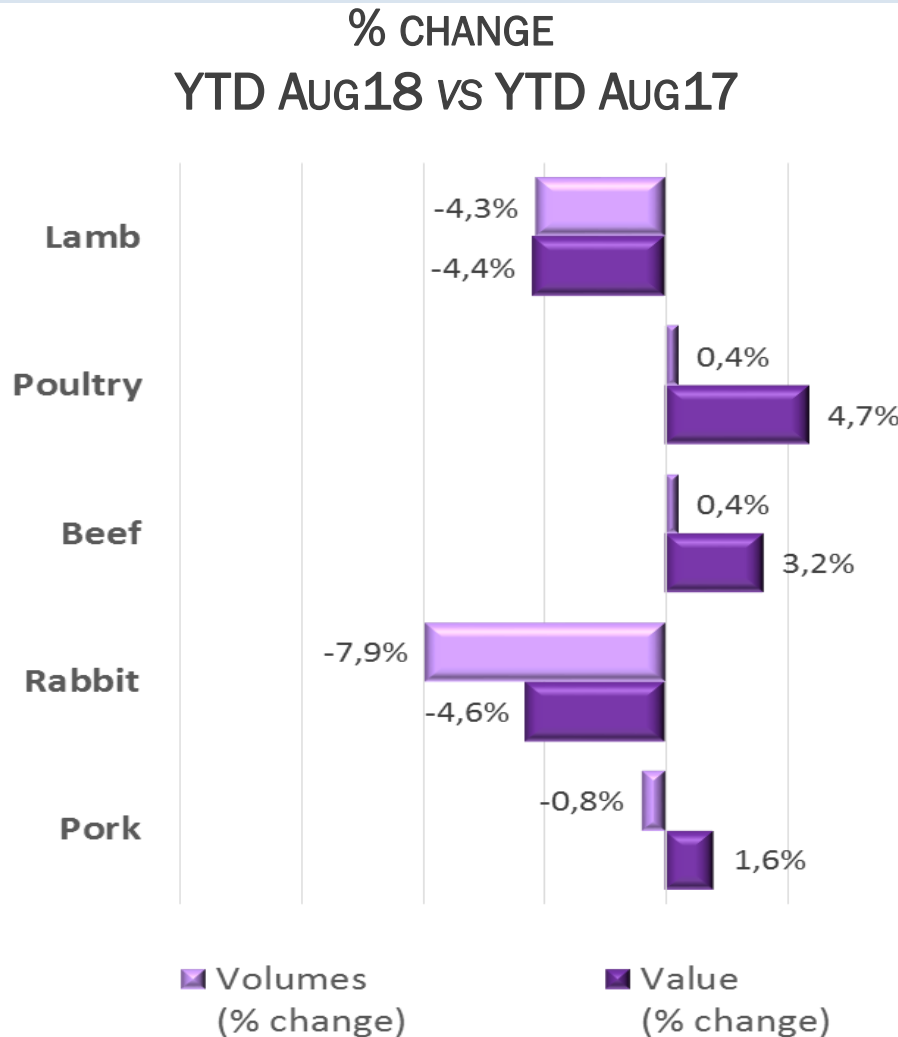
If we compare average prices per unit (kg), pork is the cheapest meat product

	Prix moyen	Évol./1 an
Cheval	17,42 €/kg	+ 5,3 %
Veau	15,69 €/kg	- 0,6 %
Bœuf	14,43 €/kg	+ 0,6 %
Viande ovine	14,42 €/kg	- 0,1 %
Elaborés*	9,90 €/kg	+ 1,3 %
Porc	7,36 €/kg	+ 0,1 %

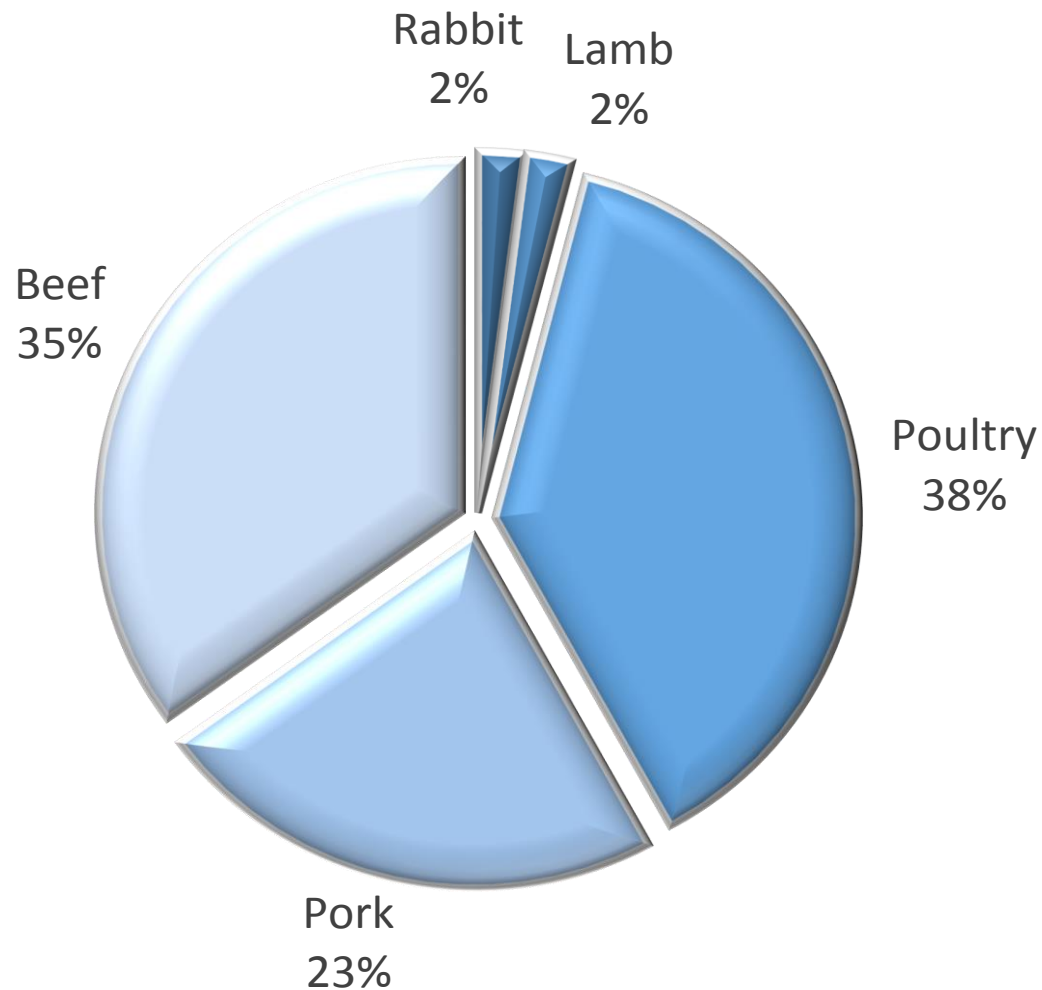
Source : Kantar Worlpanel origine FranceAgriMer. Achats des ménages tous circuits. Cumul annuel mobile au 04/11/2018.
* Elaborés de viandes de boucherie, dont hachés.

Source : Kantar Worldpanel via Llnéaires

Italy: Household Purchases of Meat



Italy: meat market breakdown, 2018 (volumes, %)



Source: Ismea estimates based on Nielsen data

Spain

Updated October 2018

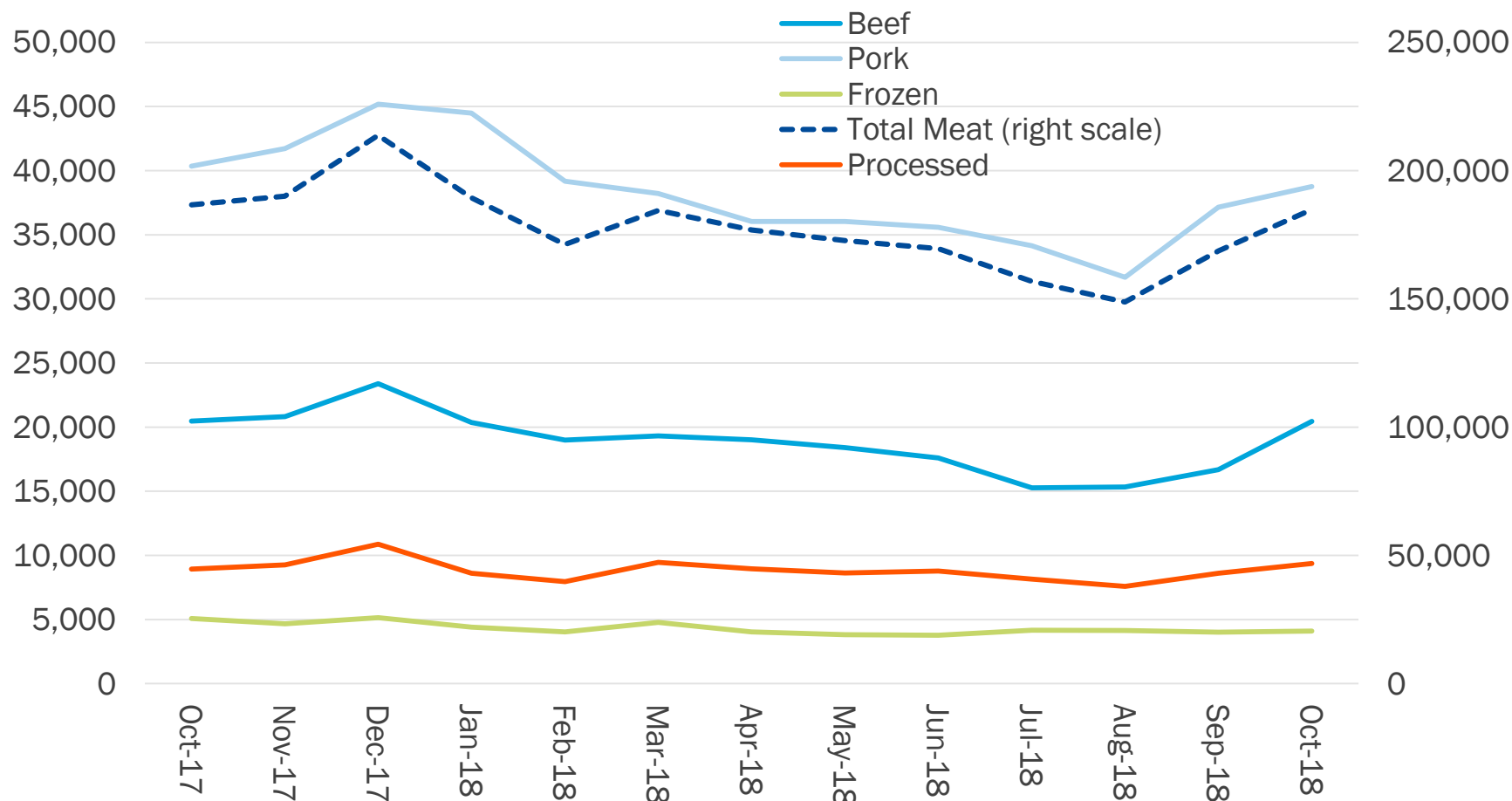
Product category	Volumes (% change Jan.-Oct. '18 vs Jan.-Oct '17)	Volumes (% change October 2018 vs. October 2017)	Value (% change Jan.-Oct. '18 vs Jan.- Oct.'17)	Value (% change October 2018 vs. October 2017)
Total meat	-2.4%	-1.0%	-0.1%	1.1%
Pork	-1.6%	-3.9%	0.1%	-4.6%
Beef	-5.2%	-0.1%	-3.2%	1.0%
Frozen	-9.8%	-19.5%	-3.1%	-15.0%
Processed meat	1.3%	5.1%	1.5%	6.5%

Source: Spanish Ministry of Agriculture

Spain

Updated October 2018

Meat consumption by product, 000s Kilos

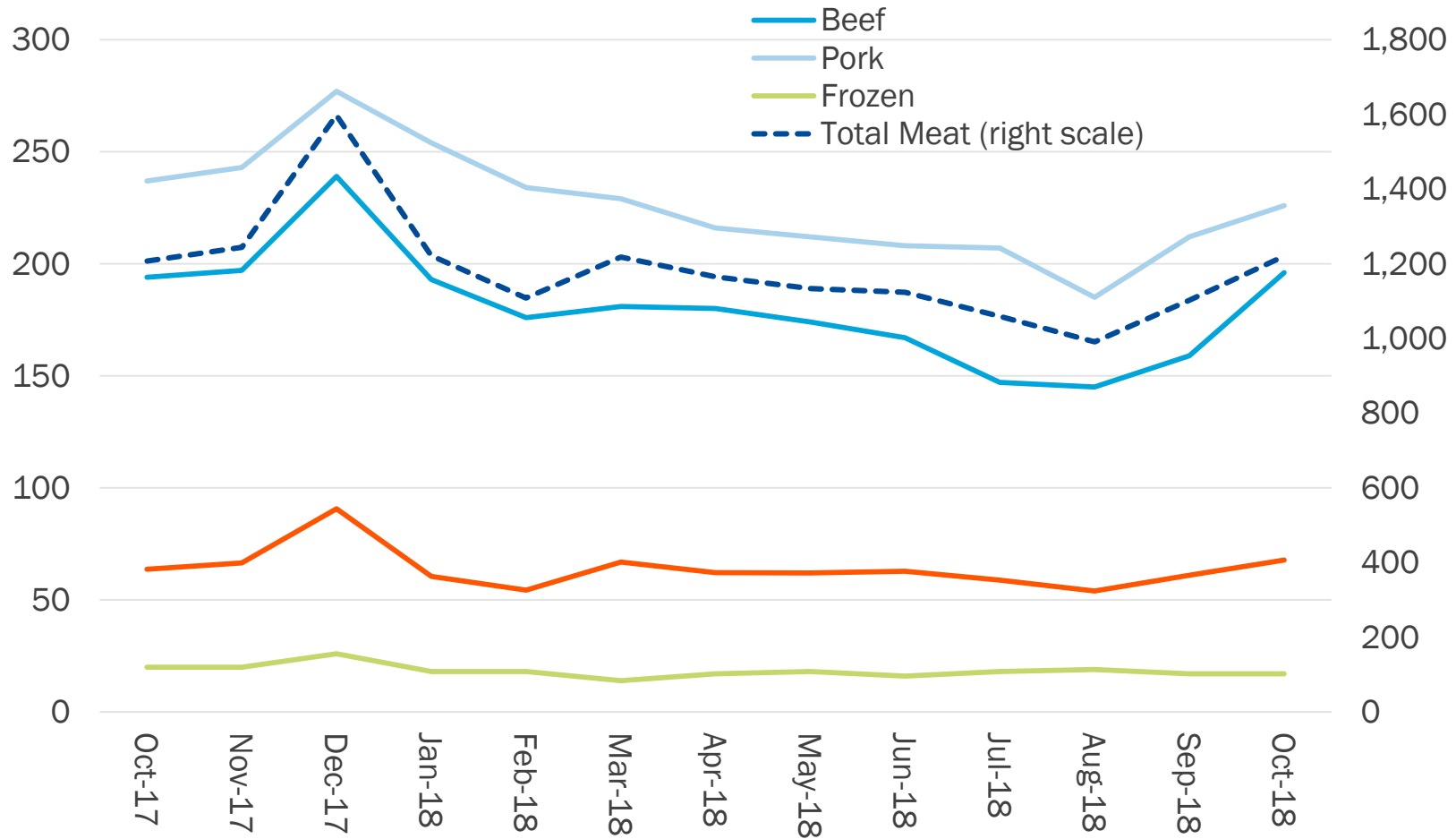


Source: *ibidem*

Spain

Updated October 2018

Meat consumption by product, million EUR



Source: *ibidem*

United Kingdom: beef

Period ending: 2 December 2018

Fresh & Frozen Beef	4 weeks ended: 2nd December 2018	12 weeks ended: 2nd December 2018	52 weeks ended: 2nd December 2018
Expenditure (£ million)	179.7	526.9	2,192.8
annual change %	-4.1	-2.9	-1.9
Volume (tonnes)	22,667	67,263	279,077
annual change %	-3.8	-2.4	-2.2
Average price (£/kg)	7.93	7.83	7.86
Penetration (%)	55.6	73.3	86.6

Annual volume change %	4 weeks ended: 2nd December 2018	12 weeks ended: 2nd December 2018	52 weeks ended: 2nd December 2018
Fresh & frozen beef	-3.8	-2.4	-2.2
- Roasting	-9.8	-9.0	-10.9
- Stewing	-4.3	+0.1	-3.5
- Frying/grilling steak	-7.8	-5.3	+2.7
- Mince	+0.0	-0.6	-1.4
- Marinade	-8.5	+1.2	+13.5
Burgers and grills	-0.8	-2.2	+6.6
Chilled ready meals	-6.1	-1.9	+0.1
Frozen ready meals	-3.0	+0.6	+3.2
Fresh pre-packed hot pies	-5.8	-7.4	-8.3
Fresh pre-packed pasties	-4.7	+0.5	-1.5
Frozen pies/puddings	-10.5	+0.0	-6.9

United Kingdom: pork

Period ending: 2 December 2018

	4 weeks ended: 2nd December 2018	12 weeks ended: 2nd December 2018	52 weeks ended: 2nd December 2018
Fresh & Frozen Pork			
Expenditure (£ million)	59.9	177.1	748.2
annual change %	+0.3	+0.2	+0.0
Volume (tonnes)	13,089	38,456	158,745
annual change %	+1.9	+2.9	-0.8
Average price (£/kg)	4.57	4.61	4.71
Penetration (%)	31.7	50.3	70.8
Annual volume change %			
	4 weeks ended: 2nd December 2018	12 weeks ended: 2nd December 2018	52 weeks ended: 2nd December 2018
Fresh & frozen pork	+1.9	+2.9	-0.8
- Belly	-12.2	-1.6	-6.4
- Chops/Steaks	+5.6	+3.7	+0.6
- Leg Roasting Joint	-11.4	-8.8	+2.5
- Loin Roasting	+13.7	-13.5	-26.9
- Shoulder Roasting Joint	+18.6	+35.8	+4.8
- Marinades	+38.3	+14.4	+11.7
- Pork Ribs	-2.5	+0.4	+4.5
- Mince	-2.3	-1.4	+8.1
Bacon	-5.0	-1.6	+0.2
Pork Sausages	+2.5	+1.1	+1.9
Fresh PP Pork Pies	+1.5	+0.0	+4.5
Fresh PP Sausage Rolls	+7.7	+7.1	+0.1
Pork Sliced Cooked Meats (incl Ham)	-3.5	-2.1	-0.6
Ready Meals (chilled)	-7.9	-0.4	+3.1