

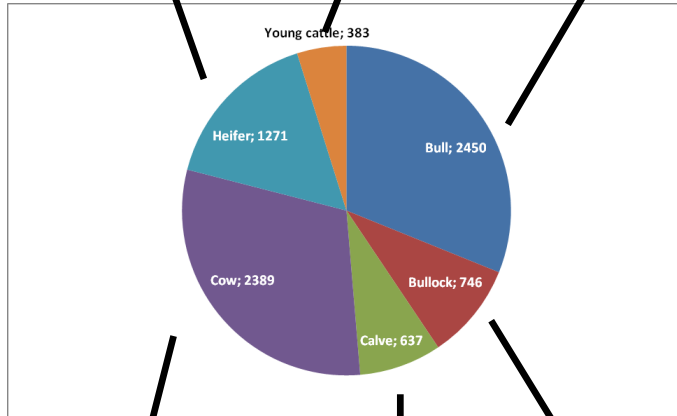
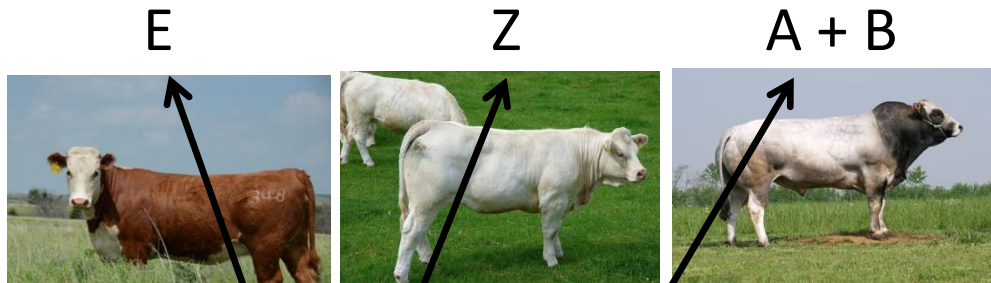
# Estimation of meat available for consumption in the EU

# Presentation outline

- Meat available for consumption – 2020 and Brexit update
  - Beef and veal
  - Pigmeat
  - Overall meat consumption
- Meat sales in retail and foodservices (2020/2019 comparison)
- Meat substitutes sales evolution

# Beef and veal

# Methodology EU Production



D

Calves

C

**EUROSTAT data:**  
Average c.w.  
- Monthly production

## Community scale for the classification of carcasses of adult bovine animals

Carcasses of adult bovine animals shall be classified by assessment respectively of:

(i) conformation (six classes: S, E, U, R, O, P);

(ii) fat cover (five classes: 1, 2, 3, 4, 5).

In order to be given an S classification, the carcass must have superior conformation and must be without defect in respect of its essential parts.

In order to be given an E classification, the carcass must have excellent conformation and must be without defect in respect of its essential parts.

In cases of U, R, O and P conformation, carcasses whose three essential parts are not of a homogeneous nature shall be placed in the class applicable to two of the three parts.

ADD: The photographs for the different conformation and fat classes relate to carcasses in the middle of the class.

Council Regulation (EC) N° 1234/2007  
Commission Regulation (EC) N° 1249/2008



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and Rural  
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**Carcass characteristics**

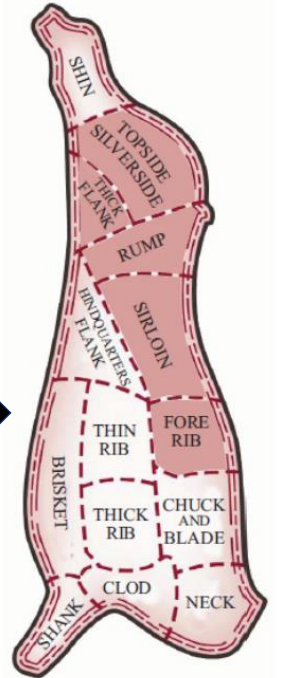
Conformation score  Use **menu selectors**

Fat Class  to predict yields

Side weight (kg)\*  OK for a beef side.

\* input side weight, then click the OK button to re-calculate.

Predicted yields of trimmed primals	% of side	Weight (kg)
<b>Forequarter trimmed primals</b>		
Shin	0	0
Clod	0	0
Neck	0	0
Brisket	0	0
LMC	0	0
Chuck	0	0
Feather/blade	0	0
Forerib	0	0
<b>Total forequarter trimmed primals</b>		
	0	0
<b>Hindquarter trimmed primals</b>		
Sirloin	0	0
Fillet	0	0
Leg	0	0
Heel	0	0
Topside	0	0
Silverside	0	0
Thick flank	0	0
Rump	0	0
Rump tail	0	0
<b>Total hindquarter trimmed primals</b>		
	0	0
<b>Total trimmed primals % (ex flank)</b>		
	0	0
<b>Total lean trim %</b>		
	0	0
<b>Total saleable yield %</b>		
	0	0
<b>Total fat trim %</b>		
	0	0
<b>Total bone and waste %</b>		
	0	0
<b>Cutting loss %</b>		
	0	0
<b>Total</b>		
	0	0



# Methodology

## Import-export conversion into consumable meat



Coefficient for conversion in consumable meat (Russo et al., 2017)

CODE	DESCRIPTION	EXPORT					IMPORT				
		AVERAGE €/kg	AVERAGE YEARLY EXPORT tonn of product	% of exports	classification for export	coefficient for consumable meat	AVERAGE €/kg	AVERAGE YEARLY IMPORT tonn of product	% of imports	classification for import	coefficient for consumable meat
2011000	CARCASSES OR HALF-CARCASSES OF BOVINE ANIMALS, FRESH OR CHILLED	3,47	15.785,92	8,72	Preparation + processing	0,58	0,50	-	-	processing	0,58
2012020	COMPENSATED* QUARTERS OF BOVINE ANIMALS WITH BONE IN, FRESH OR CHILLED	3,01	11.111,20	6,13	Preparation + processing	0,58	7,25	44,50	0,02	HVC	0,58
2012030	UNSEPARATED OR SEPARATED FOREQUARTERS OF BOVINE ANIMALS, WITH BONE IN, FRESH OR CHILLED	2,75	36.742,95	20,29	Preparation + processing	0,48	5,91	8,66	0,00	Other cut	0,48
2012050	UNSEPARATED OR SEPARATED HINDQUARTERS OF BOVINE ANIMALS, WITH BONE IN, FRESH OR CHILLED	3,86	11.667,17	6,44	Preparation + processing	0,57	5,05	488,04	0,25	Other cut	0,57
2012090	FRESH OR CHILLED BOVINE CUTS, WITH BONE IN (EXCL. CARCASSES AND HALF-CARCASSES, "COMPENSATED QUARTERS", FOREQUARTERS AND HINDQUARTERS)	6,50	3.820,53	2,11	Preparation + processing	0,68	11,91	1.114,02	0,56	HVC	0,68
2013000	FRESH OR CHILLED BOVINE MEAT, BONELESS	6,56	15.342,98	8,47	Preparation + processing	0,95	9,70	122.764,04	62,12	HVC	0,95
2021000	FROZEN BOVINE CARCASSES AND HALF-CARCASSES	4,30	1.544,83	0,85	Preparation + processing	0,58	0,40	17,30	0,01	processing	0,58
2022010	FROZEN "COMPENSATED" BOVINE QUARTERS, WITH BONE IN	3,99	8.282,52	4,57	Preparation + processing	0,58	0,63	9,90	0,01	processing	0,58
2022030	FROZEN UNSEPARATED OR SEPARATED BOVINE FOREQUARTERS, WITH BONE IN	3,06	1.382,75	0,76	Preparation + processing	0,48	1,65	10,80	0,01	processing	0,48
2022050	FROZEN UNSEPARATED OR SEPARATED BOVINE HINDQUARTERS, WITH BONE IN	2,72	1.296,90	0,72	Preparation + processing	0,57	1,45	5,64	0,00	processing	0,57
2022090	FROZEN BOVINE CUTS, WITH BONE IN (EXCL. CARCASSES AND HALF-CARCASSES, "COMPENSATED" QUARTERS, FOREQUARTERS AND HINDQUARTERS)	2,10	9.390,20	5,18	Preparation + processing	0,68	8,27	195,16	0,10	HVC	0,68
2023010	FROZEN BOVINE BONELESS FOREQUARTERS, WHOLE OR CUT IN MAX. 5 PIECES, EACH QUARTER IN 1 BLOCK; "COMPENSATED" QUARTERS IN 2 BLOCKS, ONE CONTAINING THE FOREQUARTER, WHOLE OR CUT IN MAX. 5 PIECES, AND THE OTHER THE WHOLE HINDQUARTER, EXCL. THE TENDERLOIN, IN	3,69	3.198,27	1,77	Preparation + processing	0,58	7,04	345,12	0,17	HVC	0,58
2023050	FROZEN BOVINE BONELESS CROP, CHUCK AND BLADE AND BRISKET CUTS	2,66	1.761,45	0,97	Preparation + processing	0,95	2,83	631,58	0,32	Other cut	0,95
2023090	FROZEN BOVINE BONELESS MEAT (EXCL. FOREQUARTERS, WHOLE OR CUT INTO A MAXIMUM OF FIVE PIECES, EACH QUARTER BEING IN A SINGLE BLOCK "COMPENSATED" QUARTERS IN TWO BLOCKS, ONE OF WHICH CONTAINS THE FOREQUARTER, WHOLE OR CUT INTO A MAXIMUM OF FIVE PIECES, AND THE OTHER, THE HINDQUARTER, EXCL. THE TENDERLOIN, IN ONE PIECE, CROP, CHUCK AND BLADE AND BRISKET CUTS)	3,09	59.799,95	33,02	Preparation + processing	0,95	5,83	71.975,38	36,42	HVC	0,95
TOTAL			181.127,62	100,00				197.610,14	100,00		

- Repartition of CN code in the two groups according to description and average import price;

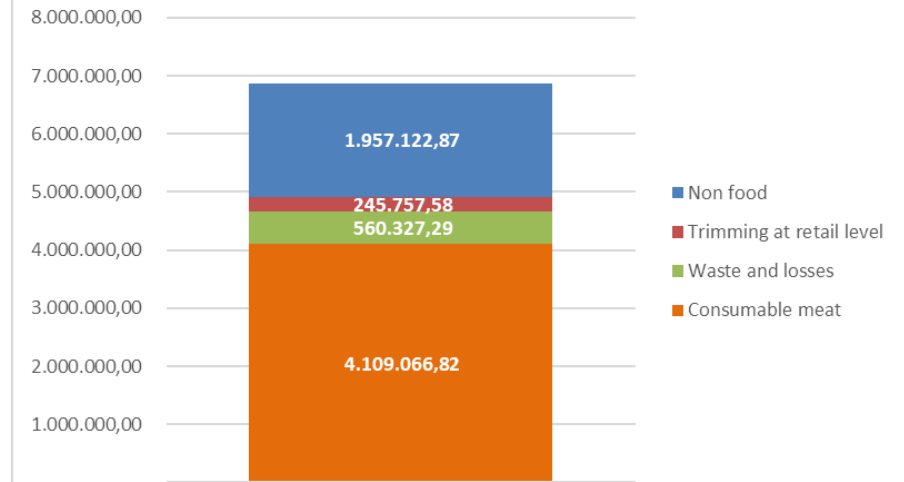
# Results EU Production



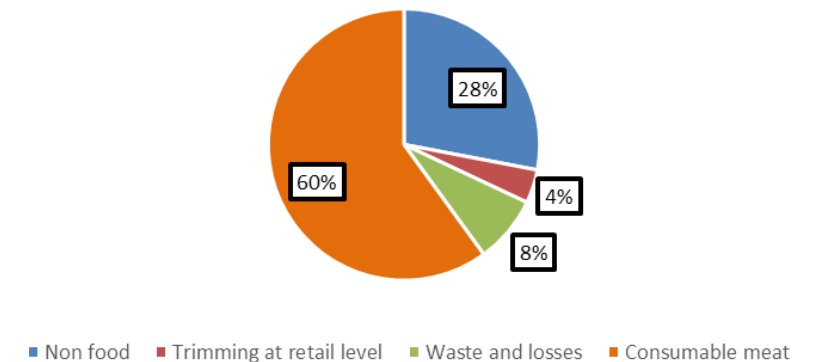
## DEFINITIONS

- Carcass weight = EUROSTAT data
- **Product weight** = c.w. – non food (70-72% of c.w.)  
(SEUROP grid for bovine and 70% of c.w. for veal)
- **Retail weight** = product weight – trimming at retail level (68% of c.w.)
- **Consumable weight** = retail weight – waste and losses (60 % of c.w.)

2020 - EU Production in tonnes



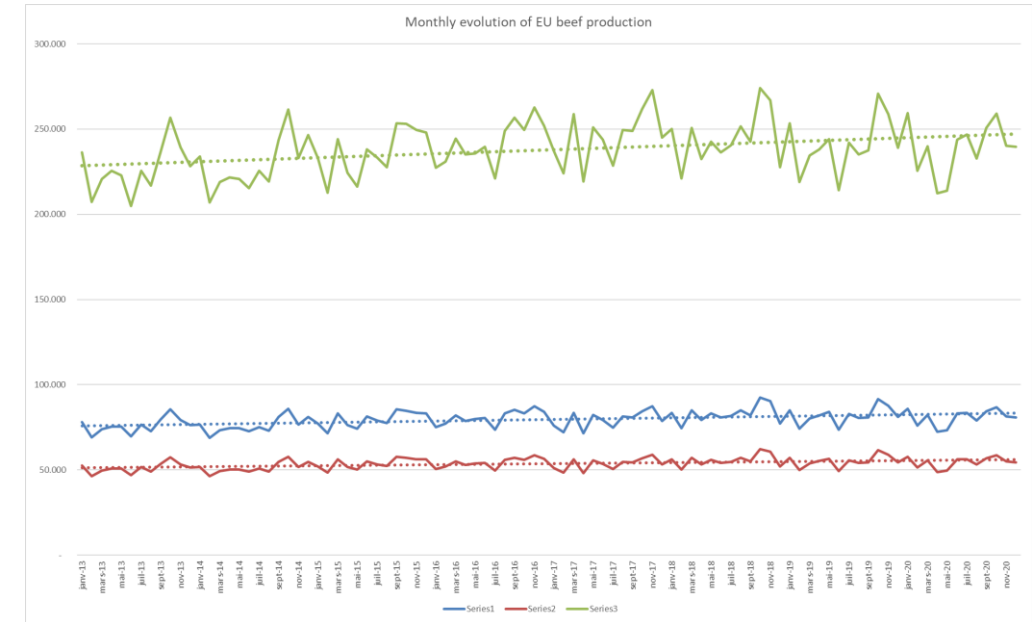
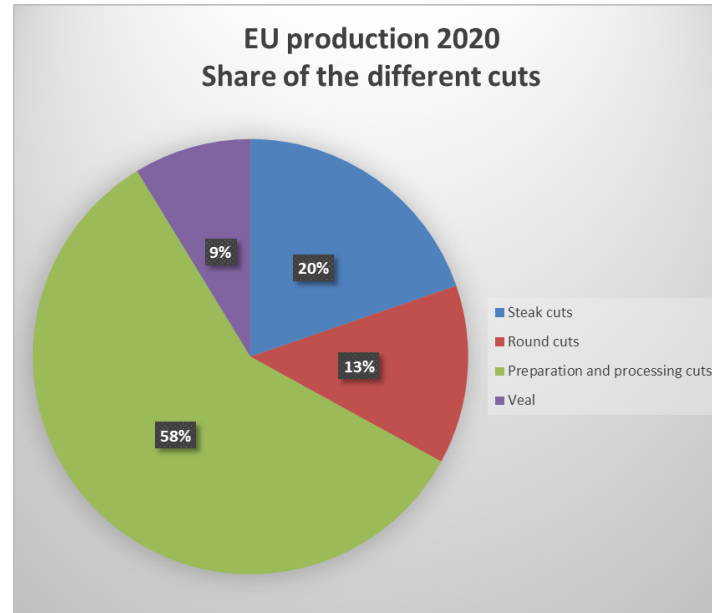
2020 - EU production as percentages of carcass weight



# Results EU Production



60 % of carcass weight is  
potentially consumed

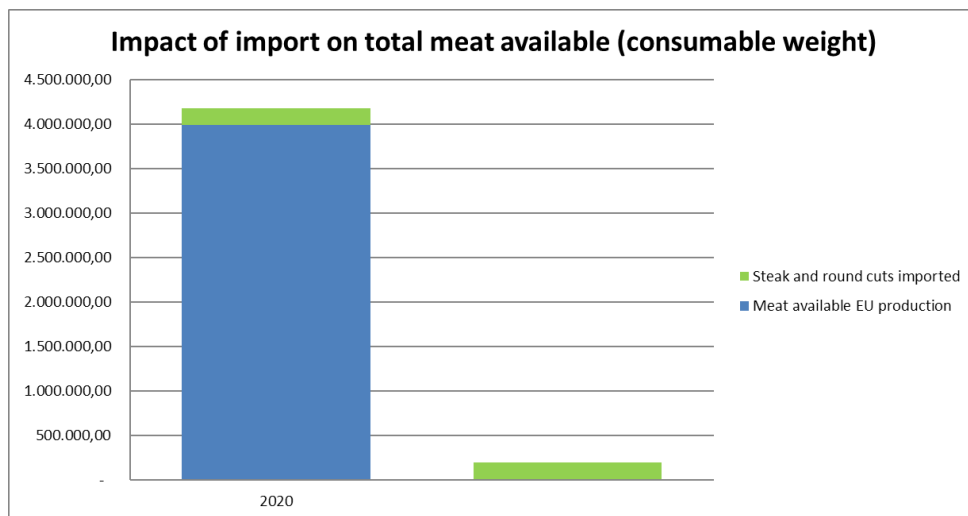


## Evolution of EU beef production in tonnes consumable weight

Cuts type	2013	2014	2015	2016	2017	2018	2019	2020
Steak cuts	801.969	803.414	842.031	853.647	838.235	875.100	865.098	852.598
Round cuts	539.656	541.450	568.579	573.857	564.853	588.220	581.916	574.926
Prep. and proc.	2.394.580	2.417.067	2.493.184	2.555.236	2.587.925	2.584.398	2.540.028	2.520.466
Veal	384.815	381.969	388.382	394.560	391.098	396.957	404.047	377.343
<b>Total</b>	<b>4.121.020</b>	<b>4.143.901</b>	<b>4.292.176</b>	<b>4.377.299</b>	<b>4.382.112</b>	<b>4.444.674</b>	<b>4.391.089</b>	<b>4.325.333</b>

# Results

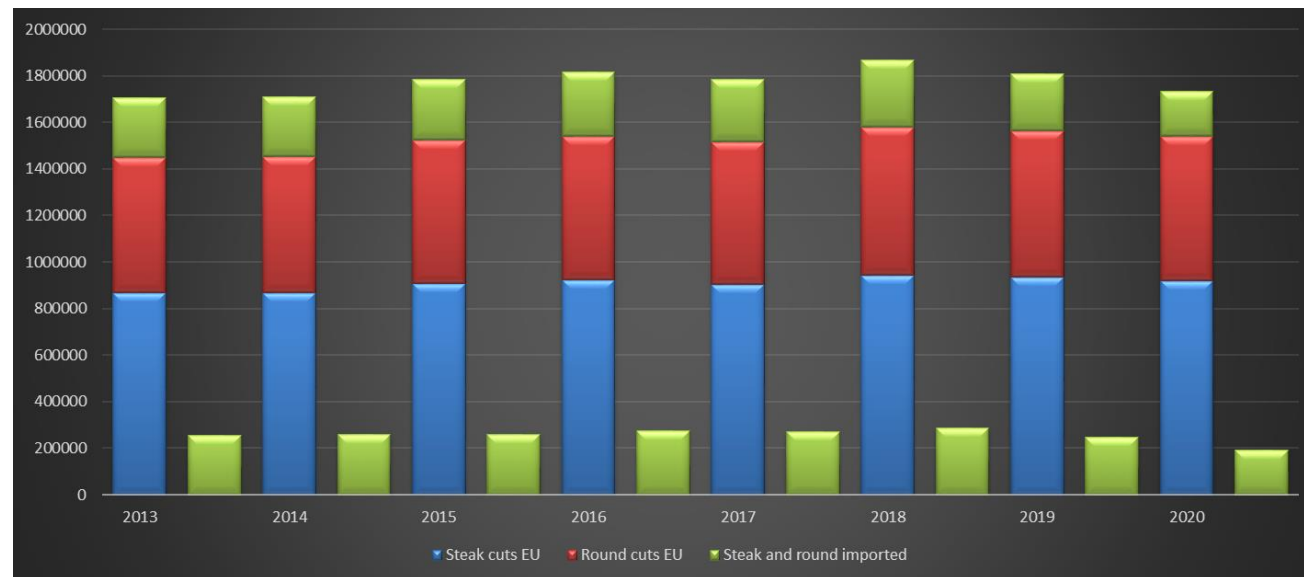
## Impact of imports



**2020**

**Tot. consumption: 4.177.906 t**

**Import: 192.150 t**



**5% of total meat consumption**

**12.5% of the steak and round cuts market segment**

**20% of the steak segment**

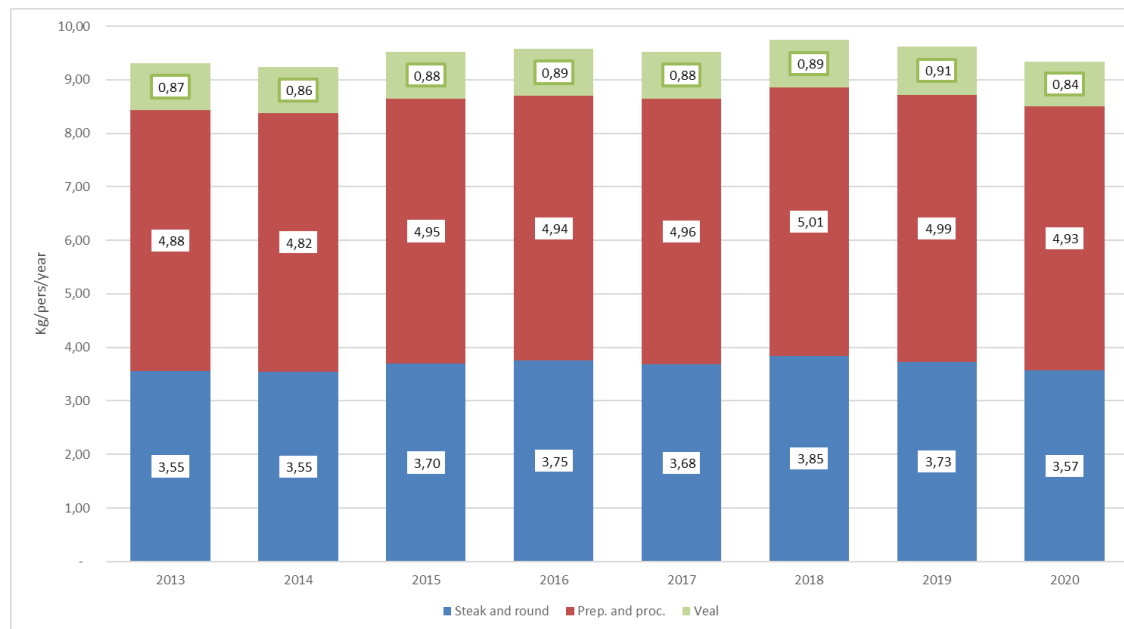


# Results

## Per capita consumption



**Per capita beef consumption  
(kg/pers/year) in the EU -27  
divided per available product categories**



Tot EU-27 consumption (tonnes)	4.106.950	4.089.377	4.224.304	4.262.281	4.242.838	4.347.263	4.296.928	4.177.906
Population EU-27	441.257.711	442.883.888	443.666.812	444.802.830	445.534.430	446.208.557	446.446.444	447.319.916
	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
Steak and round (kg/pers/y)	3,55	3,55	3,70	3,75	3,68	3,85	3,73	3,57
Prep. and proc. (kg/pers/y)	4,88	4,82	4,95	4,94	4,96	5,01	4,99	4,93
Veal (kg/pers/y)	0,87	0,86	0,88	0,89	0,88	0,89	0,91	0,84
<b>Tot consumption (kg/pers/y)</b>	<b>9,31</b>	<b>9,23</b>	<b>9,52</b>	<b>9,58</b>	<b>9,52</b>	<b>9,74</b>	<b>9,62</b>	<b>9,34</b>
Var. on previous year	-	0,79	3,12	0,64	-	0,62	2,31	-

Pigmeat

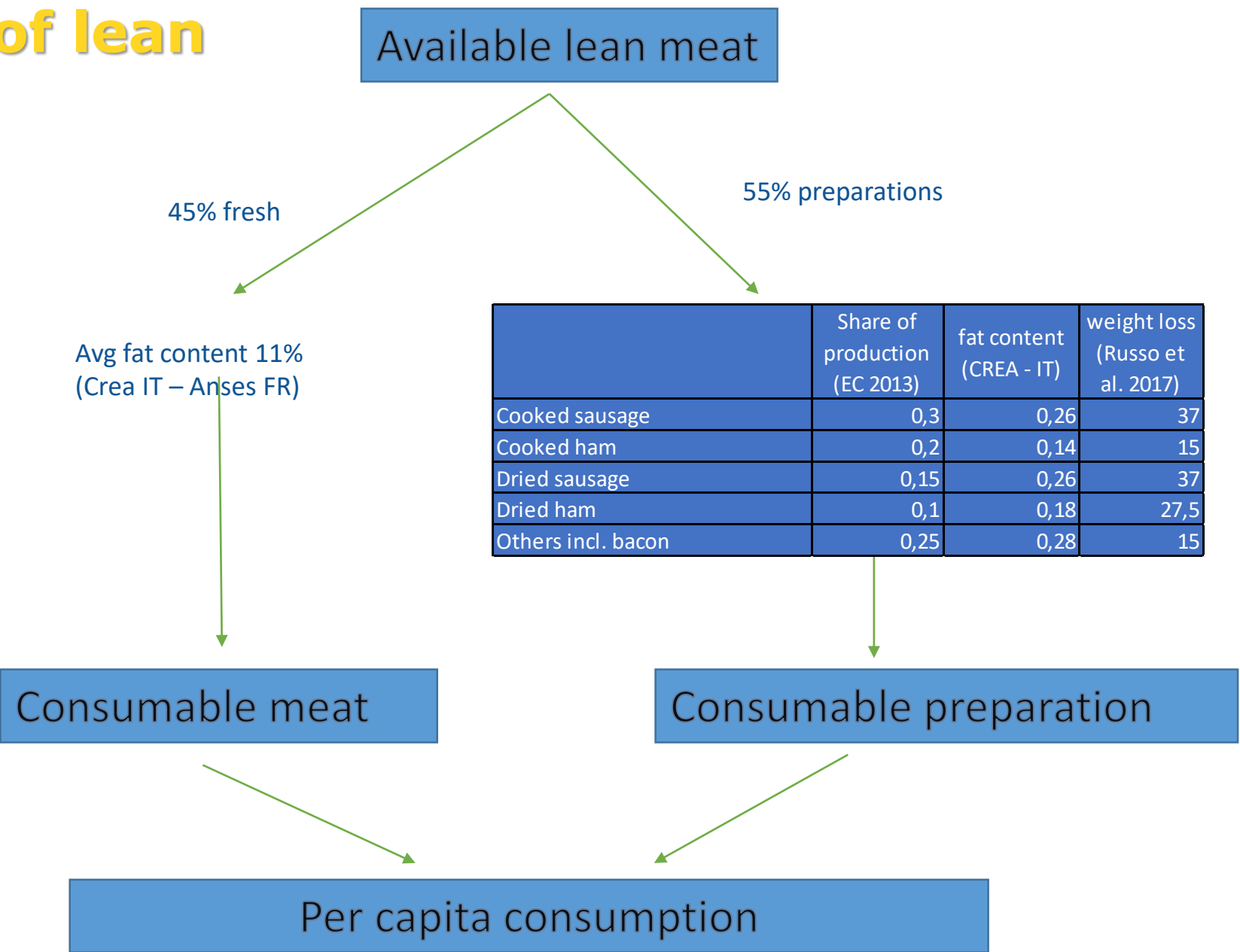
# Methodology production



- EUROSTAT production converted into lean meat of lean production using carcass classification grid and notification by MS
- EUROSTAT trade data converted into lean meat using coefficients developed by Russo et al., 2017

	2013	2014	2015	2016	2017	2018	2019	2020
Production in c.w. (x 1.000 t)	21.321	21.495	22.214	22.644	22.460	22.920	22.769	23.015
Variation on previous year		0,81	3,35	1,93	- 0,81	0,84	0,84	0,84
Production of lean meat (x 1.000 t)	12.640	12.774	13.244	13.541	13.431	13.761	13.638	13.786
Variation on previous year	#REF!	1,06	3,68	2,25	- 0,81	2,45	- 0,89	1,08
Percentage of lean meat on carcasses (EU average)	59,28%	59,43%	59,62%	59,79%	59,87%	60,04%	59,90%	59,90%
Imports of lean meat (1.000 t)	89	83	80	85	54	88	83	78
Exports of lean meat (1.000 t)	1.811	1.742	1.923	2.226	1.197	2.189	2.511	2.564
lean meat available (1.000 t)	10.918	11.114	11.401	11.401	12.287	11.659	11.209	11.300

# Conversion of lean meat into consumable products



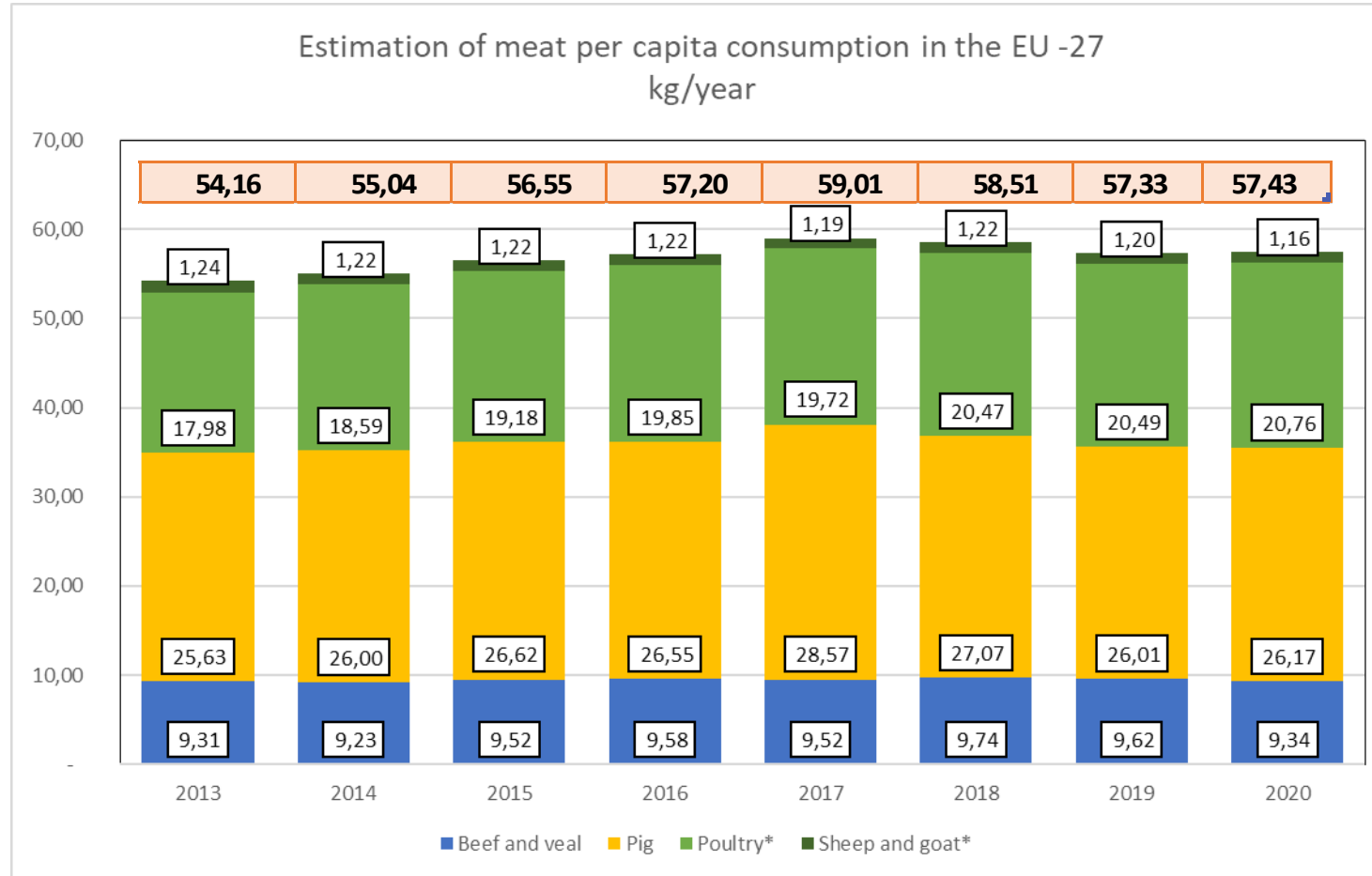
# Results per capita consumption



	2013	2014	2015	2016	2017	2018	2019	2020
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Imports of lean meat (1.000 t)	89	83	80	85	54	88	83	78
Exports of lean meat (1.000 t)	1.811	1.742	1.923	2.226	1.197	2.189	2.511	2.564
<b>lean meat available (1.000 t)</b>	<b>10.918</b>	<b>11.114</b>	<b>11.401</b>	<b>11.401</b>	<b>12.287</b>	<b>11.659</b>	<b>11.209</b>	<b>11.300</b>
<b>total consumption (1.000 t)</b>	<b>11.311</b>	<b>11.514</b>	<b>11.812</b>	<b>11.812</b>	<b>12.730</b>	<b>12.078</b>	<b>11.613</b>	<b>11.706</b>
<b>Per capita consumption (kg/year)</b>	<b>25,63</b>	<b>26,00</b>	<b>26,62</b>	<b>26,55</b>	<b>28,57</b>	<b>27,07</b>	<b>26,01</b>	<b>26,17</b>

# Conclusions

# Estimation of total meat per capita consumption



Poultry and sheep data from Medium term outlook corrected per food waste and loss coefficients

# Future developments

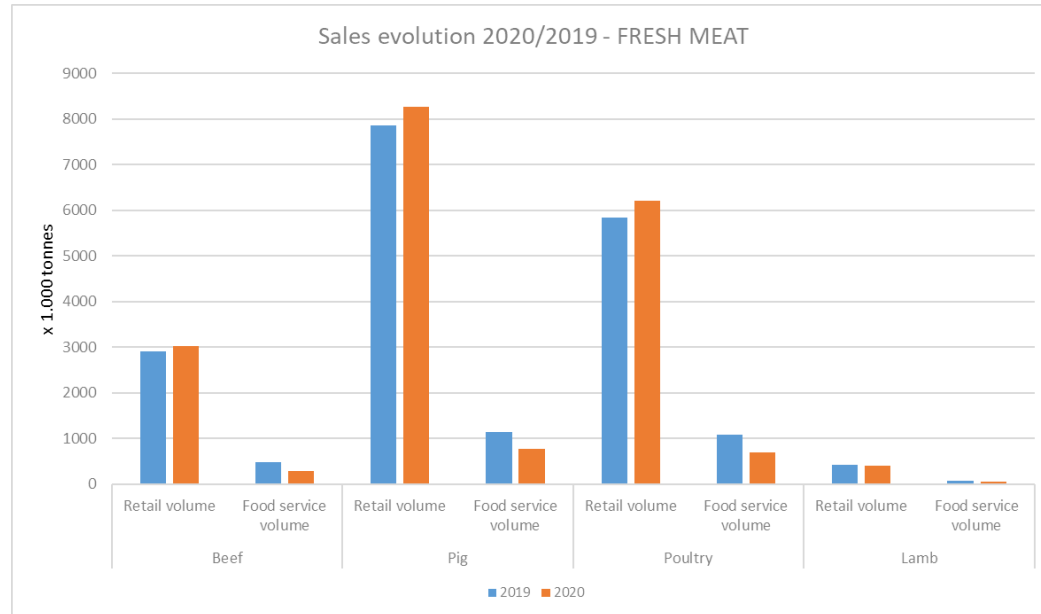
- **Refining estimation for poultry;**
- **Develop a monthly meat-available index using market information available in the Market transparency initiative.**



**Meat sales in retail and foodservices  
(2020/2019 comparison)**

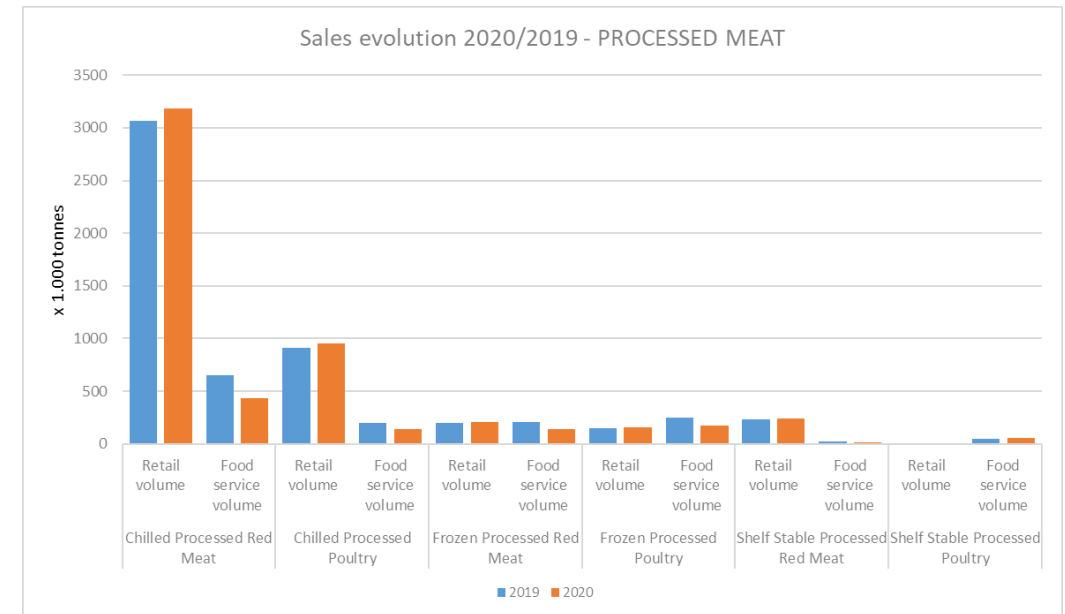
# Impact of COVID-19 on meat sales in EU-27

## Shift from food service to retail



Source: – Euromonitor International, Fresh Food, 2021

- Pig and poultry sales at retail level (in quantity) compensated the loss of sales at food services
- For beef and lamb only partial shifting
- The reopening of Ho.Re.Ca. during the summer 2020 could have partly softened the impact

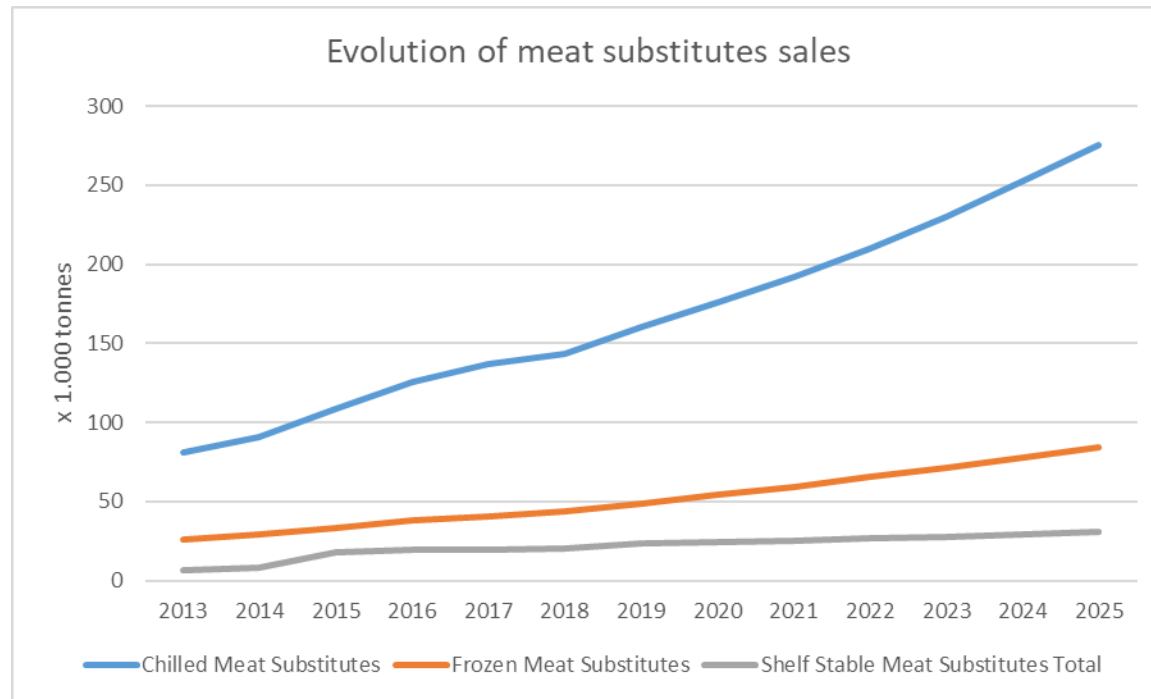


Source: – Euromonitor International, Packaged Food, 2021

- For processed meat the compensation effect was softer compared to fresh meat
- Chilled processed red meat and frozen processed poultry had the biggest impact

## Meat substitutes: market evolution in EU 27

### Total sales (retail + foodservices)



- Sector growing
- Still represent a *niche* compared to the “meat” sectors
- In 2020 it accounted for around 1% of total meat sales
- Nevertheless new brands and products are coming out on the market, thus indicating an expected “relative” growth

Source: – Euromonitor International, Packaged Food, 2021



**THANK YOU FOR YOUR ATTENTION**