



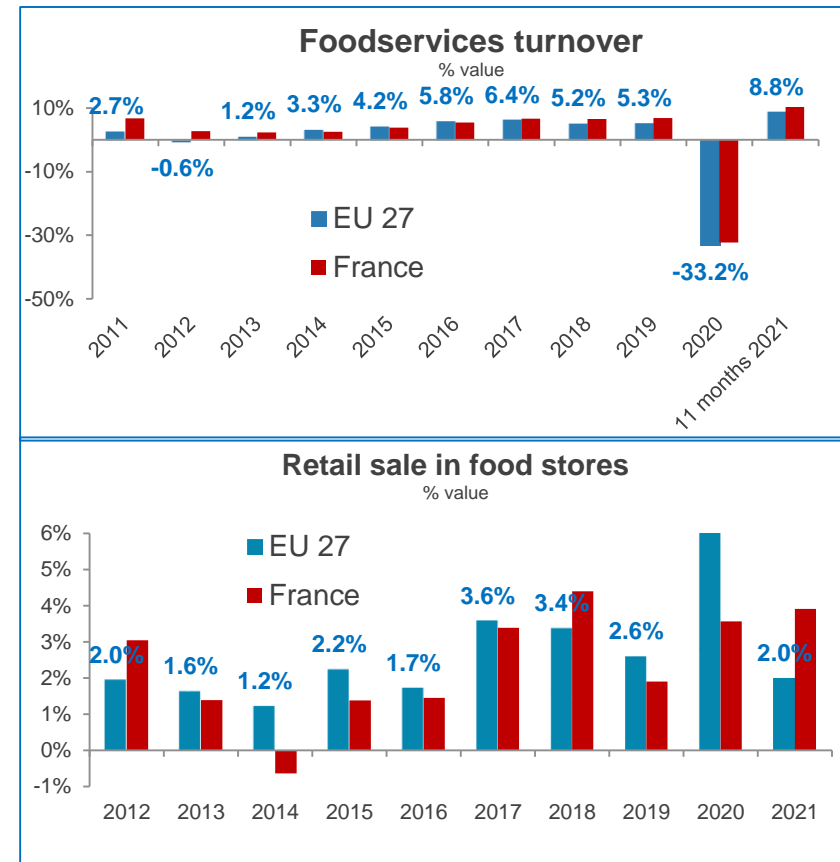
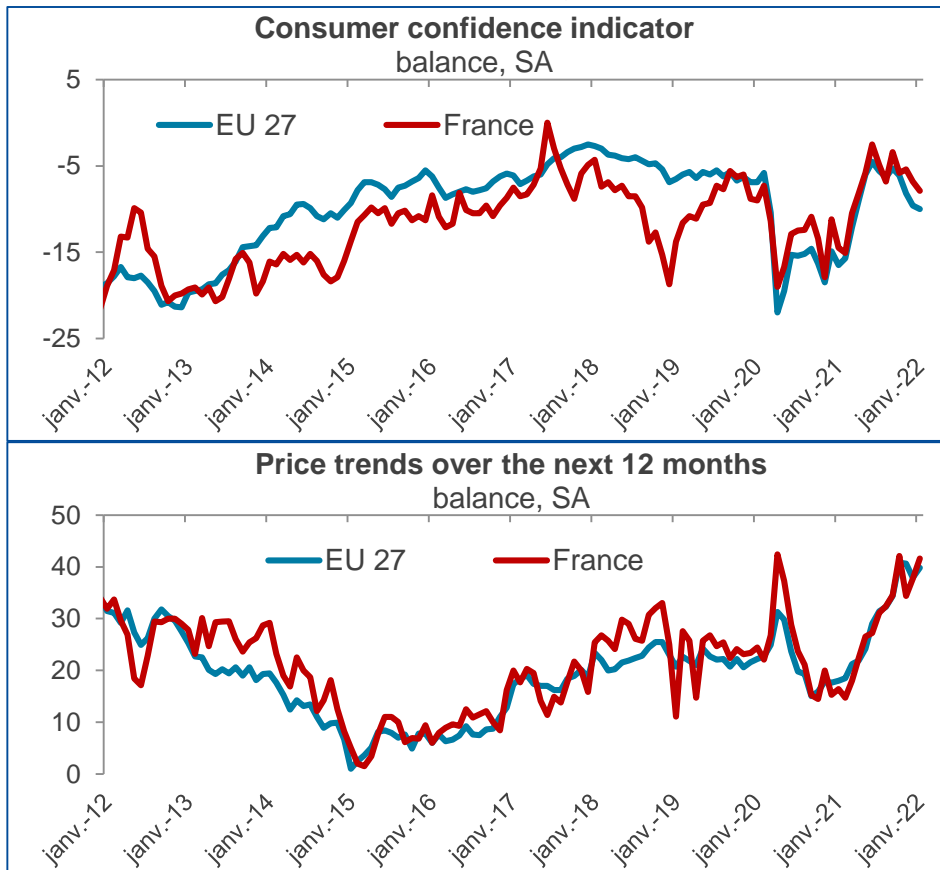
# TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

**Meat Market Observatory**  
**23 February 2022**

# France & EU

## Economic context

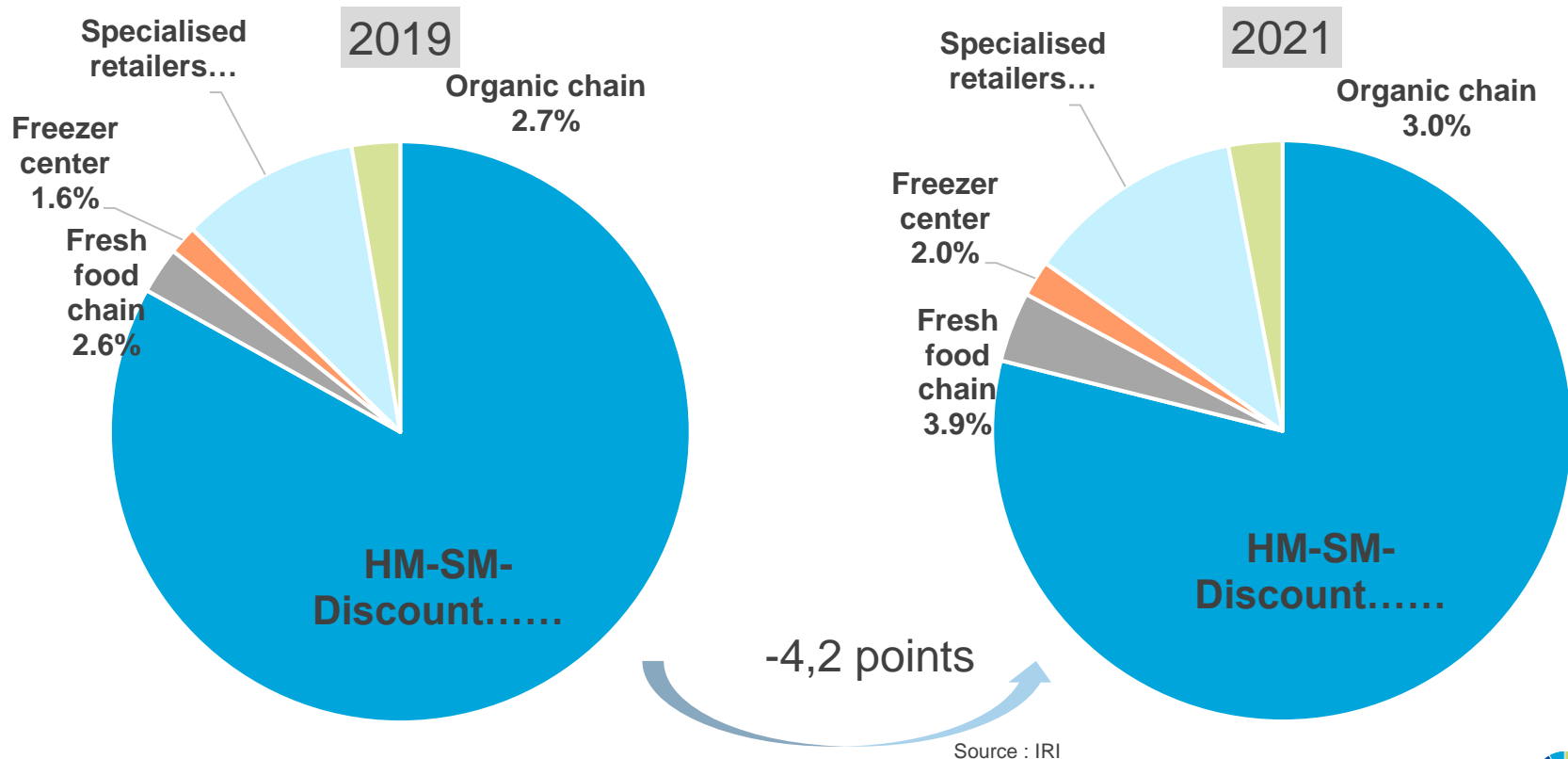
- ① Household confidence in Europe has been shrinking in recent months. Households continue to anticipate price increases in the coming months.
- ② In terms of retail channels, the sales of non-specialised food retailers continued to grow. At the same time, foodservice sales have returned to growth in 2021, but their level remains below that of 2019.



Source : Eurostat

## Food Retail : segmentation

Hypers, supermarkets and discounters have lost ground in France over the last 2 years, for the benefit of fresh food chains, specialised retailers.



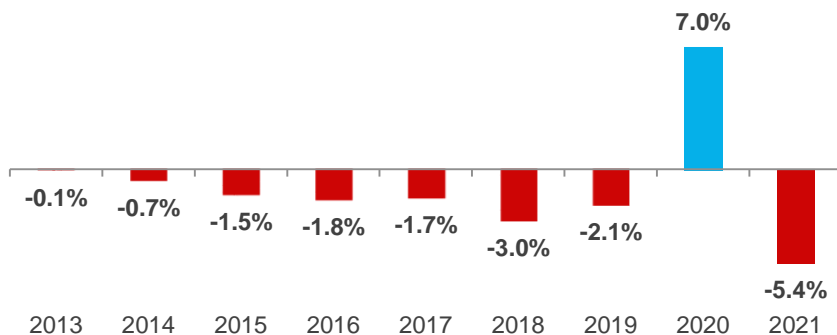
# France



Period ending 31 December 2021

## Household consumption of meat

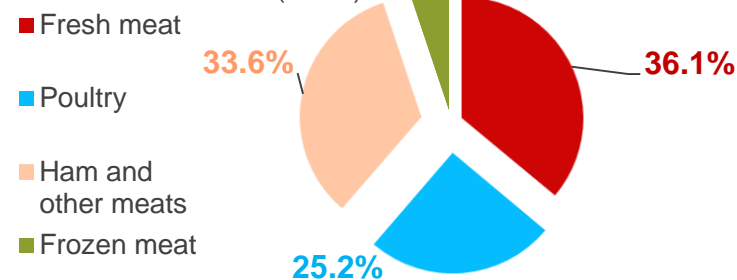
(% vol)



## Breakdown : Household consumption of meat

(2021)

(% vol)



## Household consumption of meat

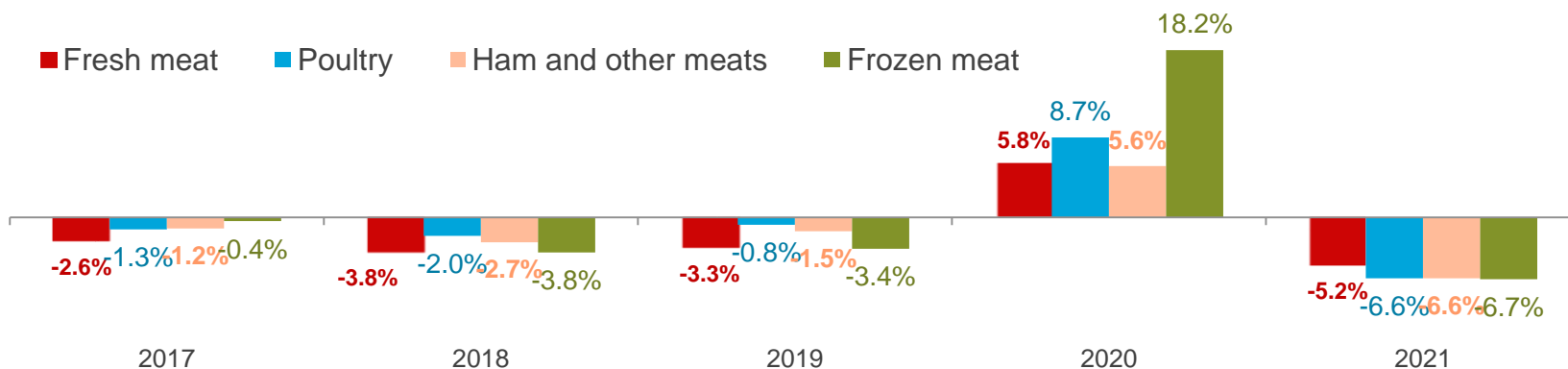
(% vol)

■ Fresh meat

■ Poultry

■ Ham and other meats

■ Frozen meat



Source: Kantar Worldpanel

# France



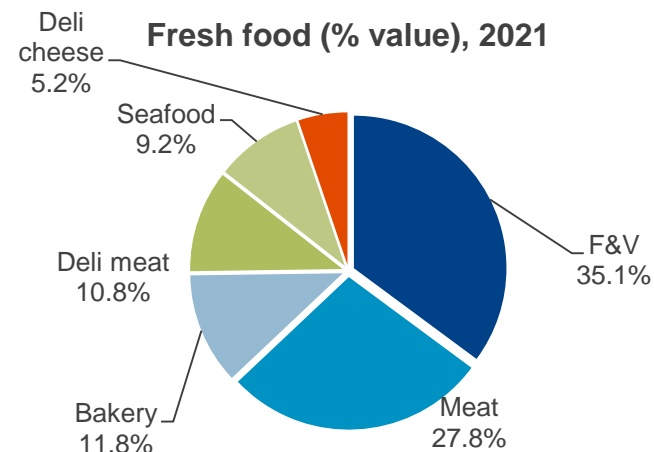
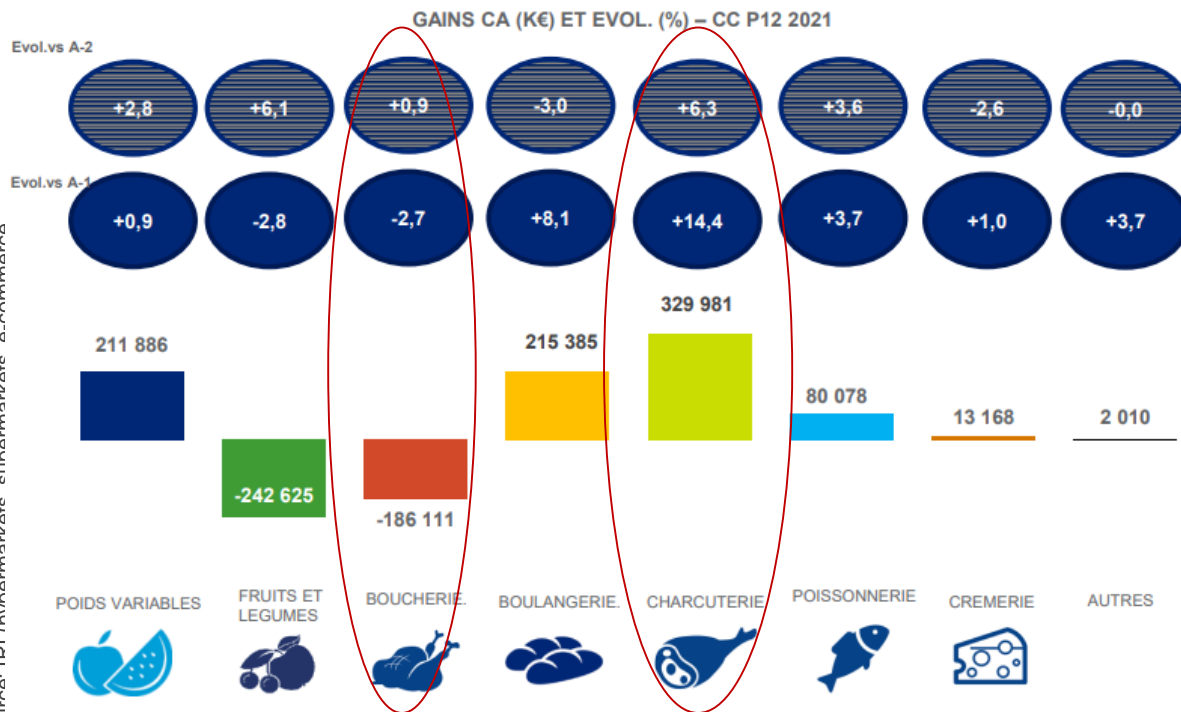
Period ending 31 December 2021

Product category	volumes (% change ) 2021 / 2020	volumes (% change ) 2021 / 2019		price (% change) 2021 / 2020	Average prices (€ / kg) / 2021
<b>MEAT</b>	<b>-5,4%</b>	<b>1,3%</b>		<b>1,3%</b>	<b>10,67</b>
<b>Fresh meat</b>	<b>-5,2%</b>	<b>0,3%</b>		<b>1,2%</b>	<b>11,60</b>
Fresh beef	-4,1%	-1,4%		1,7%	15,38
Fresh veal	-4,4%	-3,0%		0,8%	16,29
Fresh lamb	-4,0%	-7,8%		4,4%	16,04
Fresh pork	-8,0%	-1,4%		-3,1%	7,66
Tripe Products	-6,1%	-10,2%		4,8%	9,80
Processed meat, including ground meat	-4,8%	5,0%		1,0%	10,62
<b>Poultry</b>	<b>-6,6%</b>	<b>1,5%</b>		<b>2,5%</b>	<b>8,52</b>
<b>Frozen Meat</b>	<b>-6,7%</b>	<b>10,2%</b>		<b>1,1%</b>	<b>7,54</b>
<b>Ham and other meats</b>	<b>-6,6%</b>	<b>-1,4%</b>		<b>0,5%</b>	<b>11,77</b>

Source: Kantar Worldpanel

## Focus on fresh food in hypermarkets and supermarkets

The sales of fresh food products (unpacked products) increased by 0,9% in 2021 compared to 2020 (+2,8% // 2019). The sales of meat decreased by -2,7% (+0,9% // 2019), the sales of charcuterie jumped by 14,4% (+6,3% // 2019).



## French consumers' expectations (1)

According to an OpinionWay survey published in early February 2022, more than 70% of French consumers say they are willing to pay more for food products from French production and also to pay more for food products to ensure a fair remuneration for farmers.



### La perception des agriculteurs et de leur travail

Q. Êtes-vous d'accord ou pas d'accord avec chacune des affirmations suivantes ?

D'accord

Les agriculteurs ne sont pas assez soutenus par les pouvoirs publics

38%

42%

15%

4%

1%

80%

Je suis prêt à payer plus cher les produits alimentaires issus de la production française

18%

54%

21%

7%

72%

Je suis prêt à payer plus cher les produits alimentaires pour garantir une rémunération plus juste des agriculteurs

18%

53%

22%

7%

71%

Il est possible d'avoir accès à une alimentation saine à des prix raisonnables

17%

53%

24%

6%

70%

Les agriculteurs sont rémunérés à leur juste valeur

3%

15%

48%

33%

1%

18%



Tout à fait d'accord



Plutôt d'accord



Plutôt pas d'accord



Pas du tout d'accord



NSP

“opinionway pour CALIF”

Source : OpinionWay « Les Français, l'agriculture et l'alimentation » – février 2022

## French consumers' expectations (2)

French consumers are waiting for "natural" (they would prefer raw products to prepared meals, seasonal products, local producers). They would also like to consume more organic products (63% of positive responses) and 48% would like to eat "more flexitarian" (reduce their meat consumption).



### Le régime alimentaire préféré à l'avenir

Q. Demain, vous aimeriez manger... ?

Davantage **Naturel** : vous privilégiez des produits bruts aux plats préparés, choisissez des produits de saison, favorisez les producteurs locaux



Oui

88%

Davantage de **produits Bio**



63%

Davantage **Flexitarien** : vous réduisez fortement votre consommation de viande animale notamment viande



46%

Davantage **Végétarien** : vous ne consommez pas de viande animale (bœuf, volaille, poisson) du tout



19%

Davantage **Vegan** : vous ne consommez aucun produit alimentaire, textile, cosmétique ou ménager issu des animaux ou de leur exploitation (...)



14%

● Oui, tout à fait
 ● Oui, plutôt
 ● Non, plutôt pas
 ● Non, pas du tout
 ● NSP

“opinionway pour CALIF”

Source : OpinionWay « Les Français, l'agriculture et l'alimentation » – février 2022



## French consumers' expectations (3)

One out of two French people would like to reduce their meat consumption in 2022, according to this IFOP survey. 21% of French people declare follow a specific diet (flexitarian, pescetarian, vegetarian or vegan).

While more than 2/3 of French people are interested in or already follow a flexitarian diet, nearly 2 out of 10 have taken the step (or wish to do so) of a 100% plant-based diet.

### 1 Français sur 2 souhaite réduire sa consommation de viande en 2022 !

En France, les régimes alimentaires qui limitent la consommation de viande ont le vent en poupe. 21% des Français déclarent suivre un régime alimentaire spécifique (flexitarien, pescetarien, végétarien ou végétalien).

#### Les régimes alimentaires qui ont su convaincre ou intéresser les Français ?



Alors que plus de 2/3 des Français sont intéressés ou suivent déjà un régime flexitarien, près de 2 Français sur 10 ont sauté le pas (ou souhaitent le faire) d'une alimentation 100% végétale !

Source : IFOP – January 2022

### Plant-Based substitutes in HM-SM : 105 M€ in 2021

After a double-digit increase around 2016/2017, sales of plant substitutes in hypers and supermarkets had slowed down significantly in 2019. But they are accelerating again, with the arrival of new players. Up 16% between November 2020 and November 2021, sales remain modest (105 M€).

#### Fundraising for plant-based companies:

Following the October 2021 launch of bacon and bacon substitutes, **La Vie** has raised €25 million in funding. This financing should allow the start-up to develop and to establish itself in all the major retail chains (France & EU, UK)

**Umiami**. The start-up has raised 2.3 M€ from investment funds, BPI and several business angels, to build a pilot plant in Ile-de-France. The plant will be operational by mid-2022.

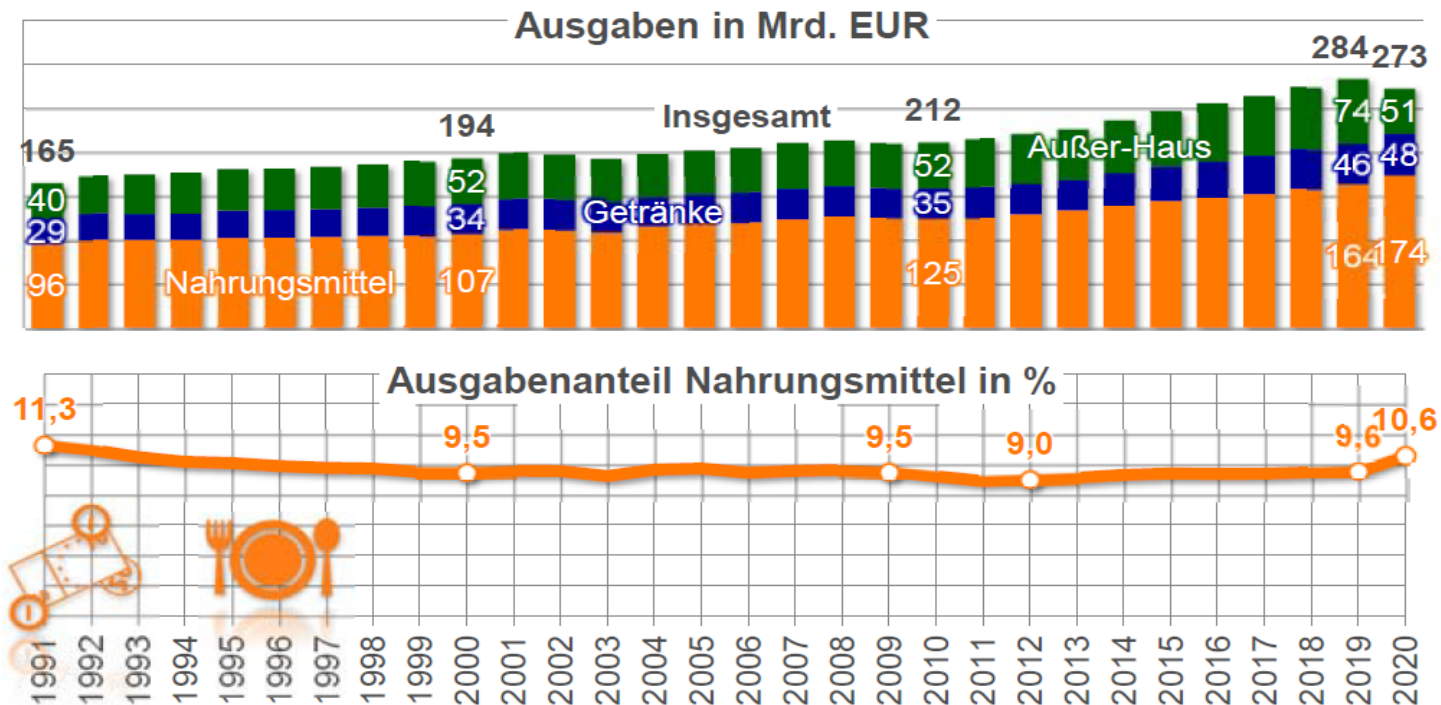


**Carrefour** has announced to test in its hypermarket of Carré-Sénart a **vegetable corner within the traditional butchery department**. The corner is developed by The “Le Boucher Végétarien”, a Dutch brand, a subsidiary of Unilever since 2018.

### Zu-Hause-Verzehr hat 2020 stark zugelegt

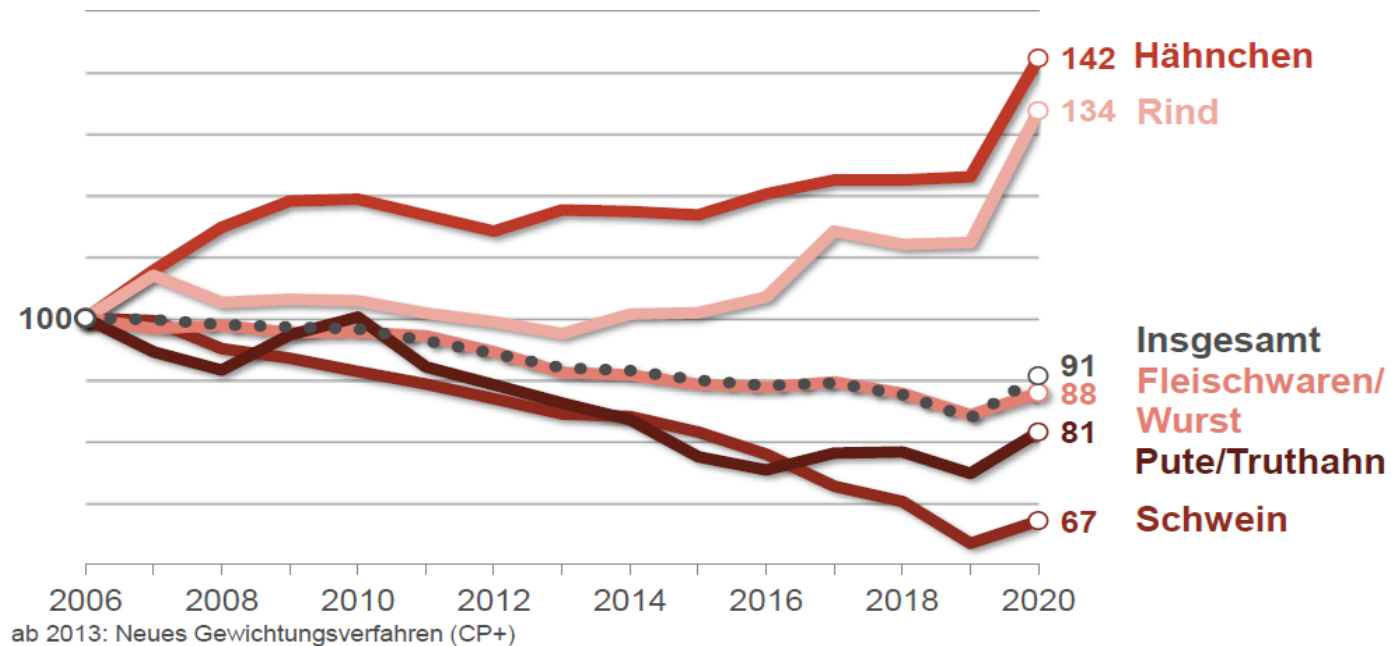


Konsumausgaben der privaten Haushalte für Nahrungsmittel und Getränke in Deutschland



### Nachfrageschub in der Pandemie

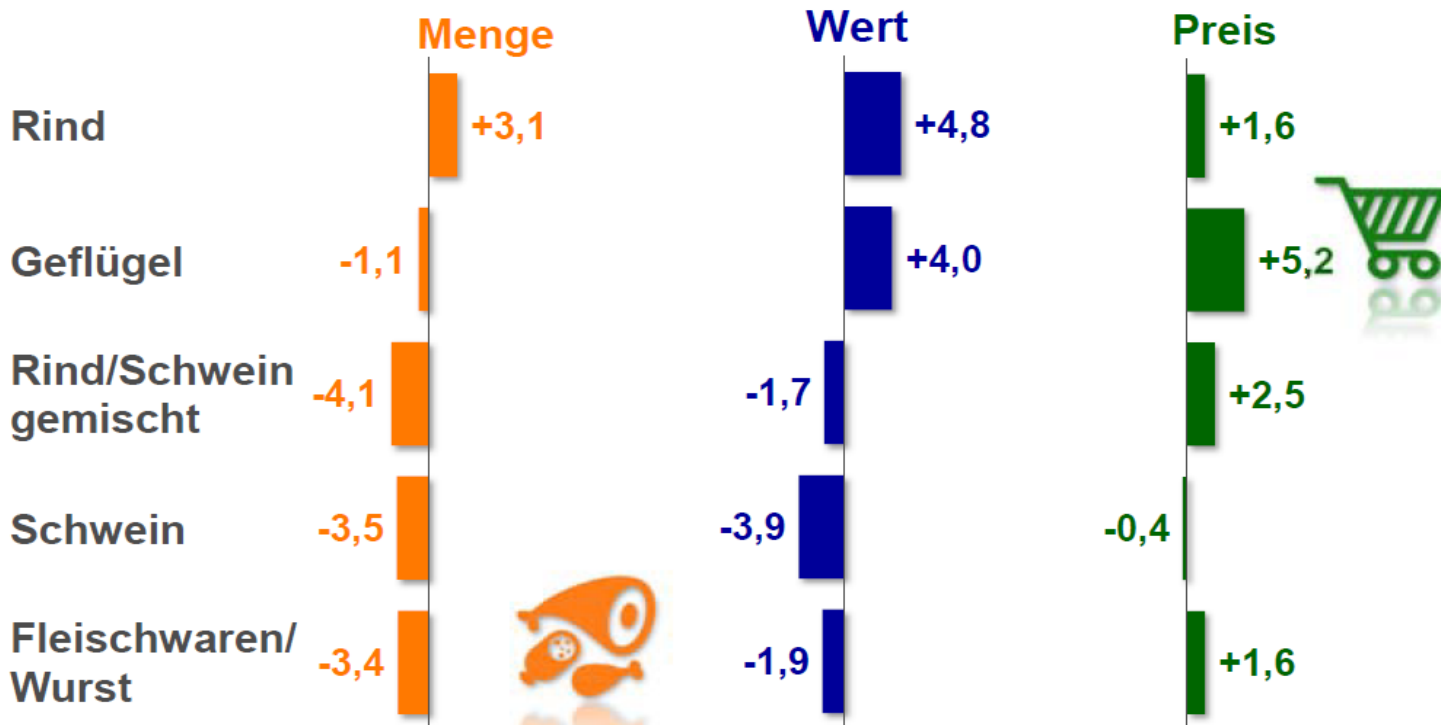
Nachfrage privater Haushalte für Fleisch, Fleischwaren/Wurst und Geflügel in Deutschland; Index Einkaufsmenge (2006 = 100)



### Fleischnachfrage geht zurück

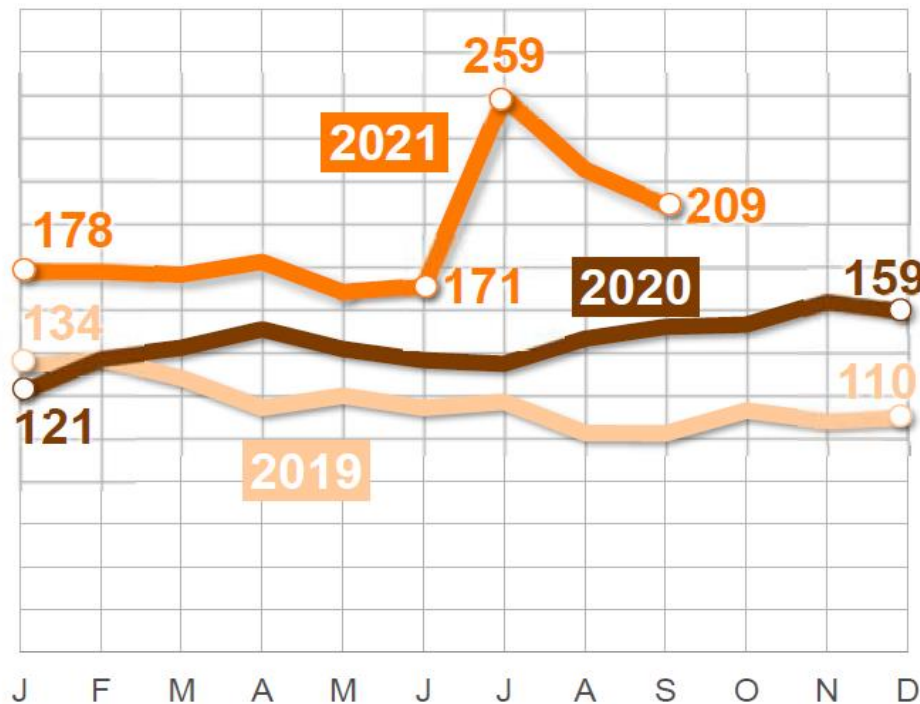


Nachfrage privater Haushalte in Deutschland nach Fleisch, Wurst und Geflügel von Januar bis September 2021, Veränderungen zum Vorjahreszeitraum in %

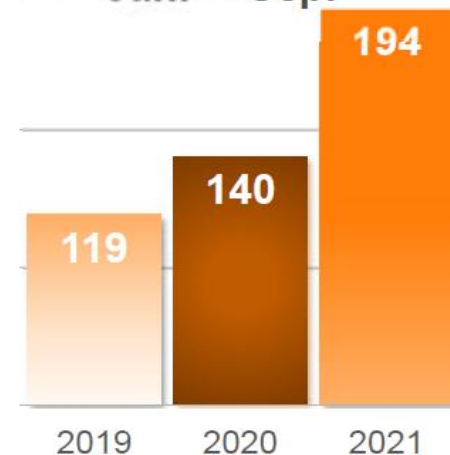


### Schweinefleischlager weit über Vorjahr

Schweinefleisch, Gefrier- und Kühlhausbestände in 1.000 t,  
in Deutschland

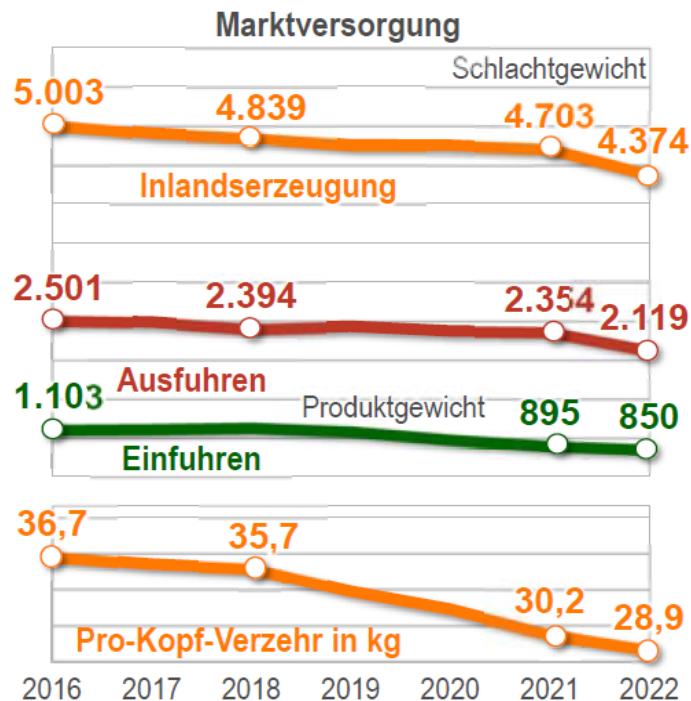


Monatsdurchschnitt  
Jan. – Sep.

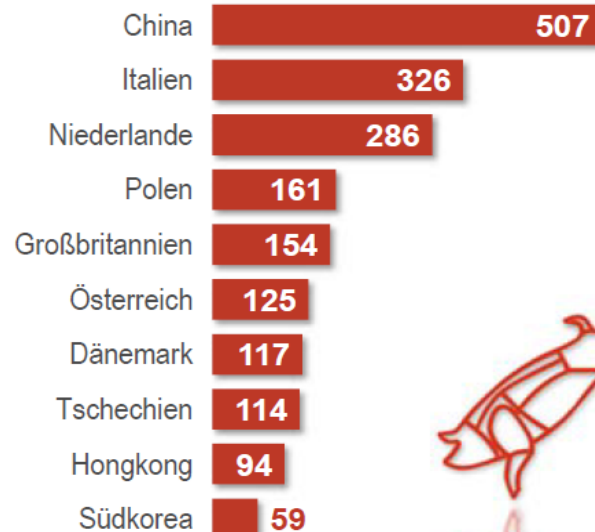


### Der deutsche Schweinefleischmarkt

in 1.000 t



#### Ausfuhren 2020



Produktgewicht inkl. Nebenerzeugnisse. 2020 – vorläufig; 2021 und 2022 – geschätzt.

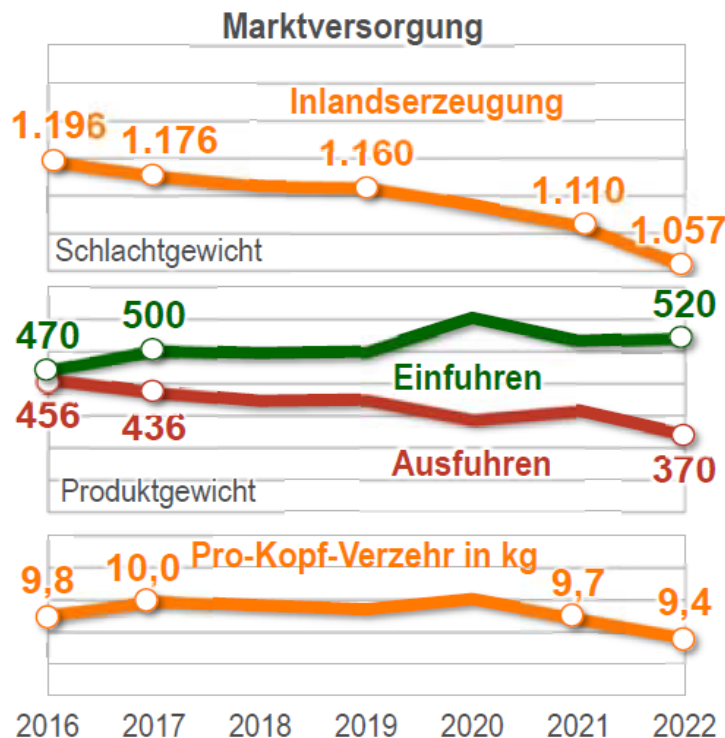
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Quelle: AMI; BLE; Destatis; Thünen-Institut



### Der deutsche Rindfleischmarkt

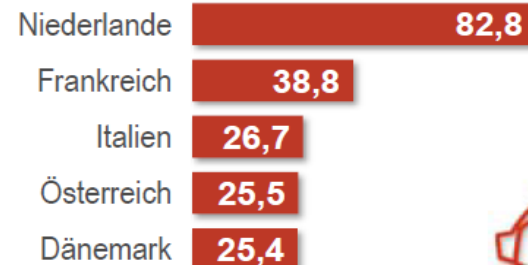
Aus- und Einfuhren in Produktgewicht, in 1.000 t



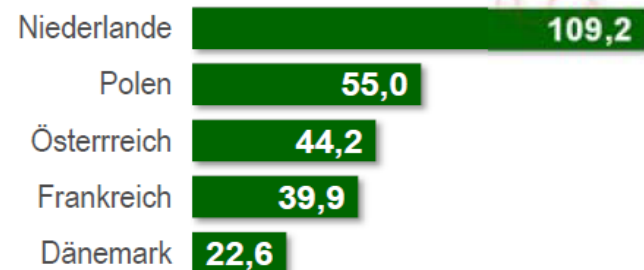
2020 – vorläufig; 2021 und 2022 – Prognose.

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### Ausfuhren 2020



### Einfuhren 2020



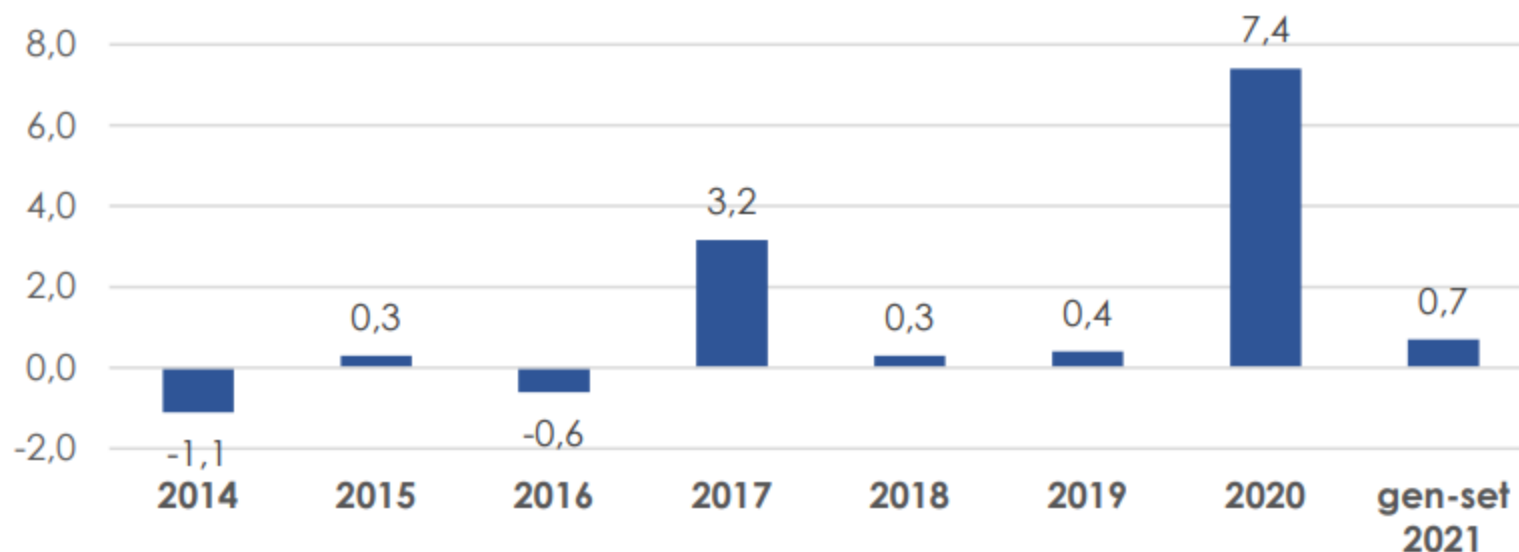
Quelle: AMI; BLE; Destatis; Thünen-Institut



## Household food consumption

After the boom of 2020, growth in household **food consumption** has slowed significantly in 2021.

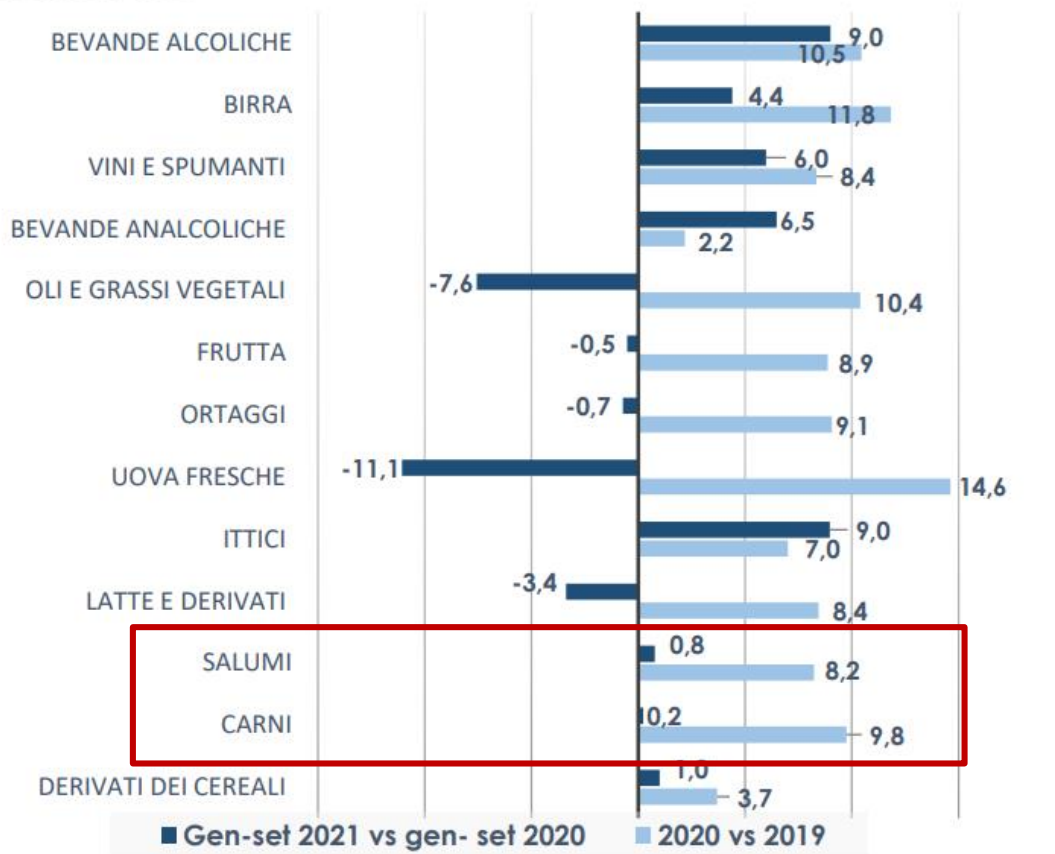
### Variazione % della spesa su base annua nel periodo 2014-2021



Fonte: Elaborazioni Ismea-Nielsen

## Breakdown of food consumption

La spesa per acquisti domestici di prodotti alimentari - Var.% primi nove mesi 2021 vs primi nove mesi 2020



The consumption of meat and charcuterie in Italy represented more than 16% of total food expenditure in the first 9 months of 2021.

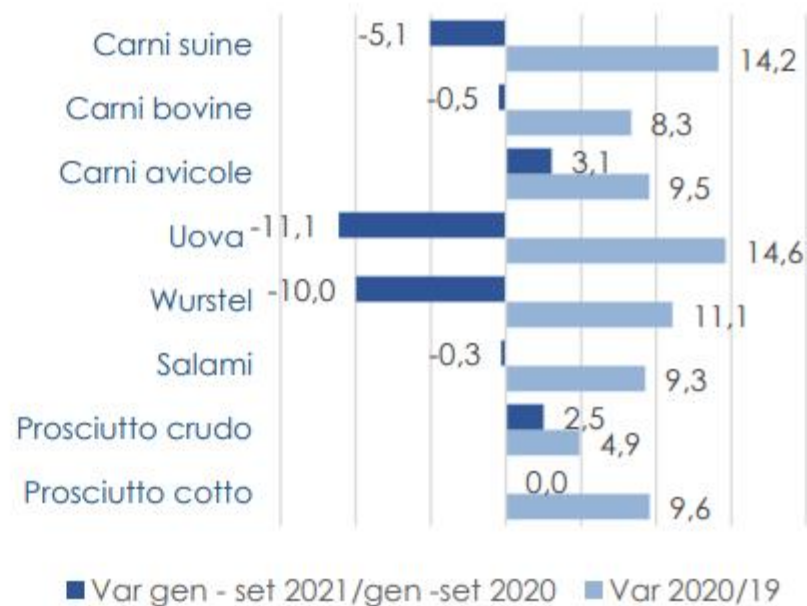
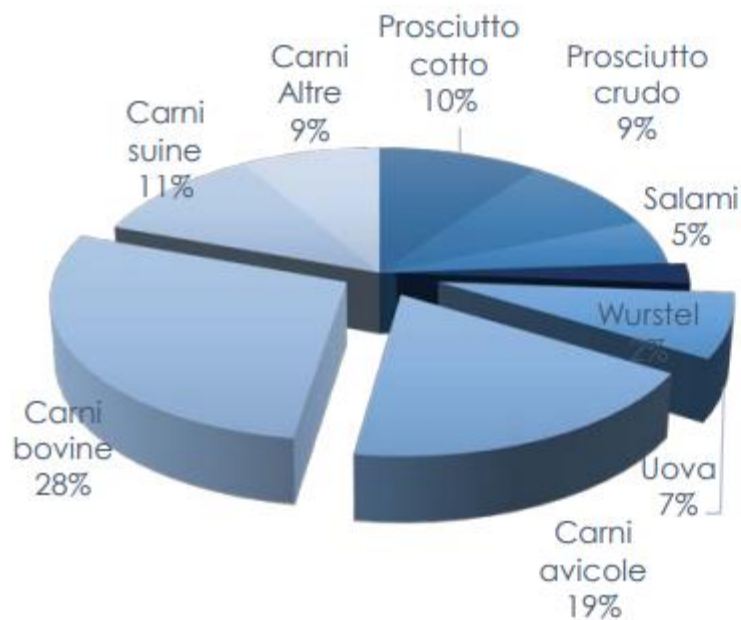
After a strong increase in 2020, the growth of meat consumption has slowed down in 2021 (over 9 months)

Fonte: Ismea- Nielsen

## Breakdown of meat consumption

The trend was downward for all segments. Note the decline in the consumption of pork (-5.1%) and sausages (-10%).

### I prodotti proteici di origine animale — Quote e variazioni della spesa su base annua



Fonte: Ismea-Nielsen

## Meat consumption

In 2020, supermarkets and butchers sold 24.6 million kilos more meat than in 2019. This increase can mainly be attributed to the sales of meat (over 23.3 million kilos) and less to that of cold cuts (almost 1.3 million kilos). This increase does not compensate for the decline in meat consumption in 2020. Another remarkable change in the market is the continued growth in sales of plant-based substitutes. However, the size of this market is and remains relatively modest for the time being (4%).

### Meat consumption in corona year 2020 in the Netherlands

Clear drop  
in meat  
consumption



More fresh  
meat sold via  
butchers and  
supermarkets



More plant-based  
meat substitutes  
sold in  
supermarkets



2020 **75.9 kg** total  
based on carcass weight (bone-in weight)

2020 **555.7 million kg** total

2020 **€ 200 million**

2019 **77.8 kg**

2019 **531.1 kg**

Of which

**36.2 kg**



**22.1 kg**



**15.1 kg**



More meat sold compared to 2019

**24.6** million kg, of which

fresh meat

**23.3**  
million kg



meat products

**1.3**  
million kg



Market size meat in retail sector



**4%** plant-based  
meat replacements

Dagevos, H., Verhoog, D., van Horne, P. en Hoste, R. (2021). *Vleesconsumptie per hoofd van de bevolking in Nederland, 2005-2020*. Wageningen: Wageningen Economic Research. (in Dutch)

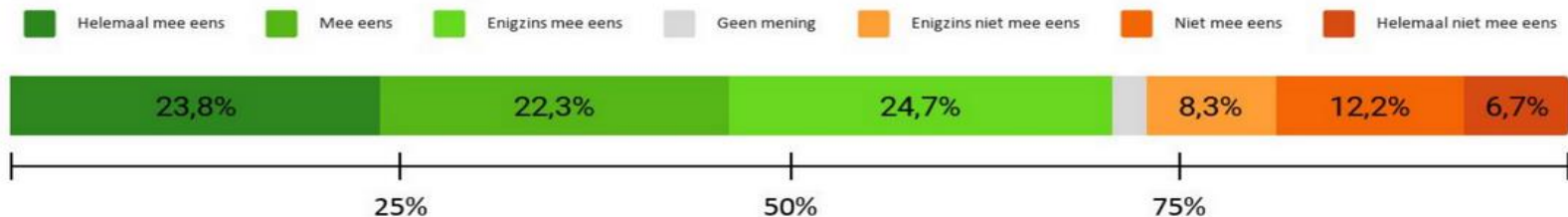
# Netherlands



## What does the Netherlands think of the Protein transition?

Most Dutch people (72%) think that we should eat fewer animals. A total of 4 out of 5 Dutch people say that they are uncomfortable with the way animals are used in the food industry. 28% of Dutch people hope that one day we will no longer use animals as food at all.

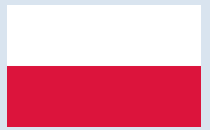
Nearly three-quarters of Dutch people think we should eat fewer animal products



More than four out of five Dutch people feel discomfort at the way in which animals are used in the food industry



# Poland



## Meat consumption

Annual meat consumption per capita in Poland has been declining steadily since 2016. In that year the average Pole consumed 73.5kg of meat. The average had dropped to 61kg in 2019. This downward trend is likely to continue in coming years as more people consider cutting meat out of their diets, or reduce it significantly.

change in  
sales  
in % by  
volume

Zmiana w sprzedaży, w proc.,  
ilościowo, VI 2018/VI 2021



households purchasing vegetal alternatives  
in thousands  
First half of 2020 & 2021

Gospodarstwa domowe kupujące  
roślinne zamienniki, w tys.



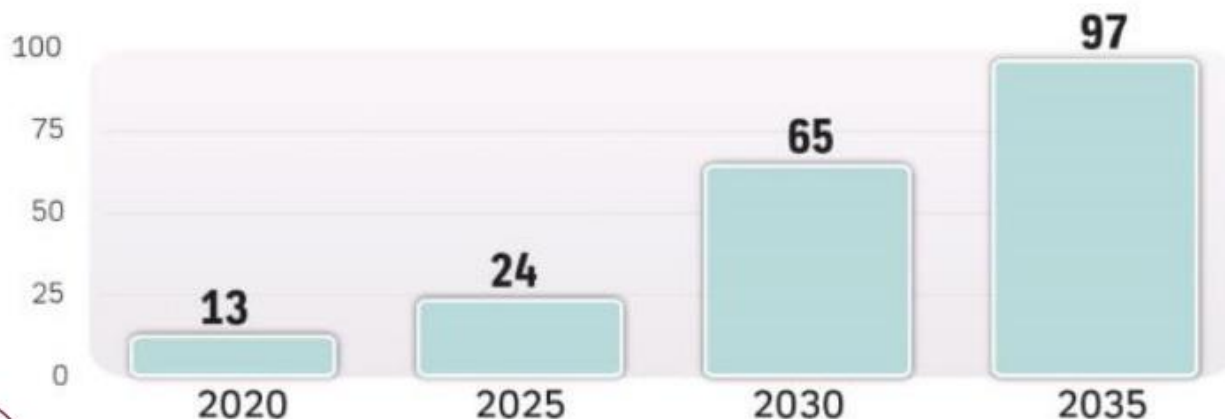
Source : GFK

## Plant-based substitutes in Poland

Poles are giving up meat and turning to substitutes. Sales of most types of meat are falling, while in case of vegetable substitutes increased by 480% in three years. Since 2018 the sale of meat in terms of volume has been decreasing - most strongly fresh, by 7.5%, the sale of cold cuts or canned meat has also shrunk slightly less, while it has increased only in the case of frozen food - comparing the volume of sales from June 2018 to June 2021.

### Consumption of plant-based substitutes

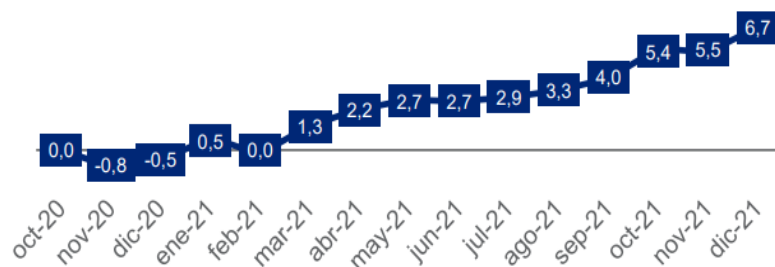
Konsumpcja zamienników produktów odzwierzęcych,  
w mln ton sześciennych



Source : GfK

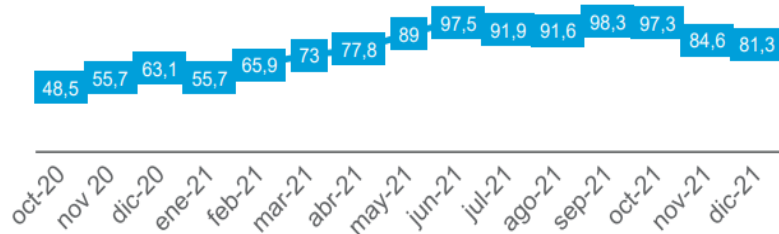
## Macroeconomics indicators

### EVOLUCIÓN ÍNDICE DE PRECIOS AL CONSUMO

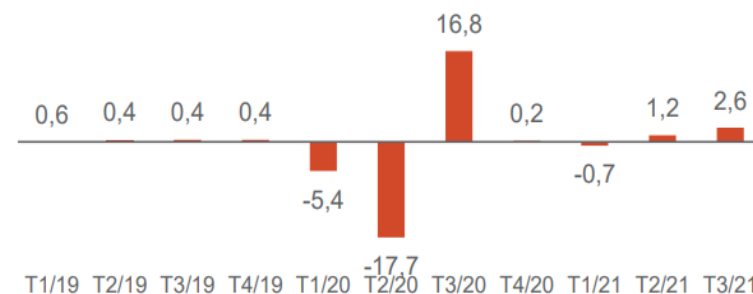


Fuente INE

### ÍNDICE DE CONFIANZA DEL CONSUMIDOR

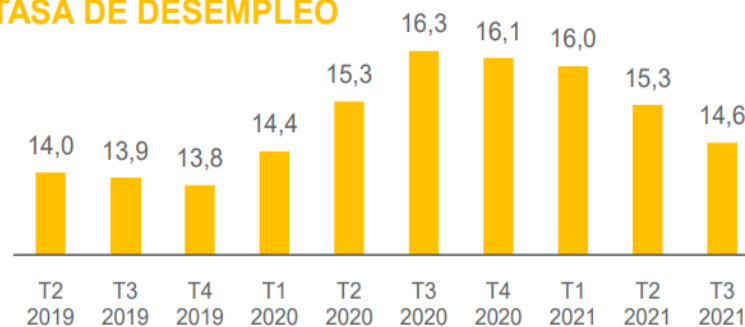


### EVOLUCIÓN PRODUCTO INTERIOR BRUTO



Fuente INE (Tasa trimestral)

### TASA DE DESEMPLEO



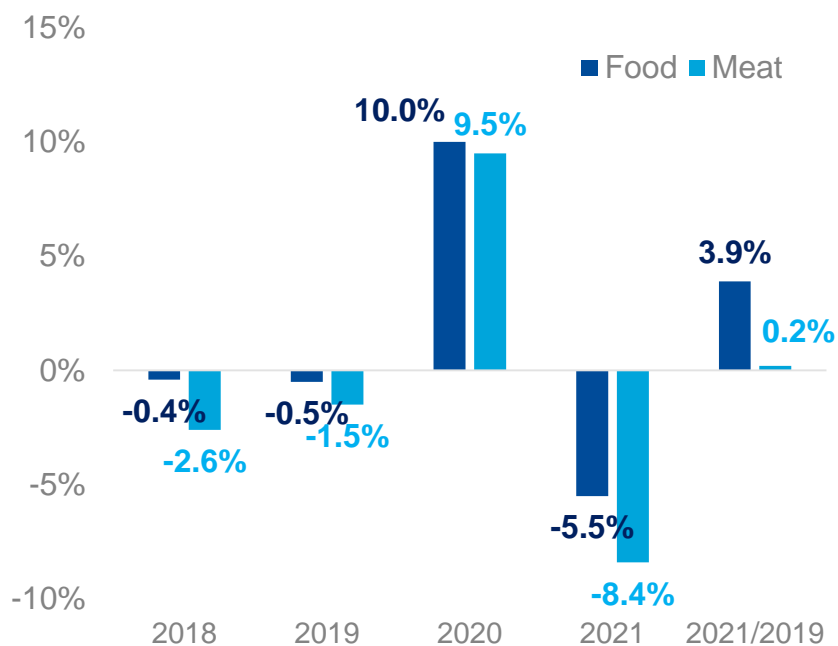
Source: IRI



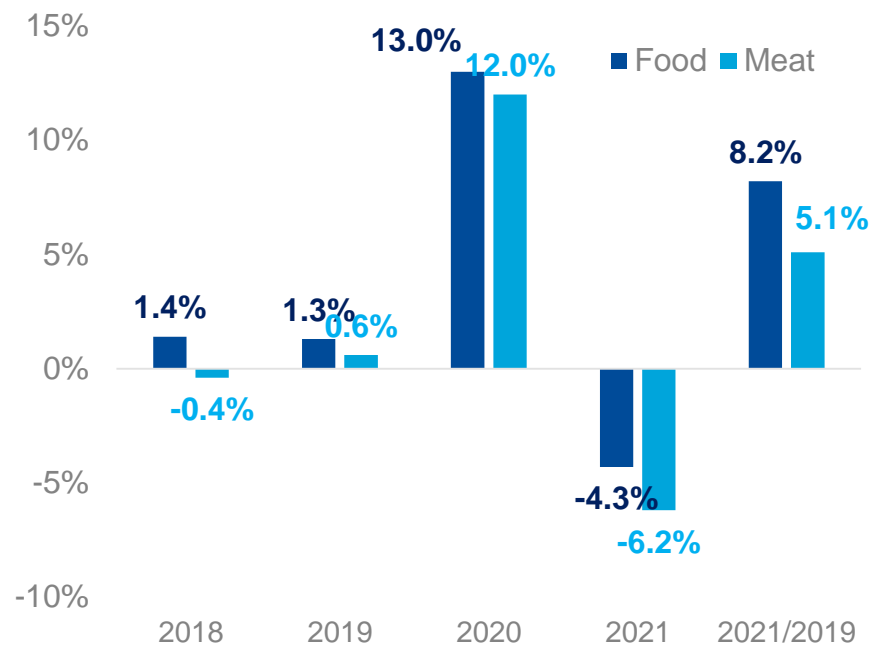
## Meat consumption (at home)

Meat consumption is down in 2021 compared to 2020. But its level is stable in volume compared to 2019, and even up 5.1% in value compared to 2019.

**Food and meat consumption**  
(% volume)



**Food and meat consumption**  
(% value)



Source : Ministerio de Agricultura, pesca y alimentacion

## Meat consumption (at home)

Spanish meat consumption increases in value for all segments between 2019 and 2021, with the exception of sheep/goat meat and rabbit meat.


M T / 11 months	2019	2020	2021	2020/2019	2021/2020	2021/2019
Total food	28 698	31 574	29 822	10,0%	-5,5%	3,9%
Total meat	2 090	2 288	2 095	9,5%	-8,4%	0,2%
Meat Chicken	571	626	566	9,6%	-9,5%	-0,8%
Meat Pork	446	502	451	12,4%	-10,1%	1,1%
Beef Beef	226	245	223	8,4%	-9,1%	-1,4%
Rabbit meat	42	44	37	3,8%	-14,0%	-10,7%
Sheep meat goat meat	61	65	56	5,4%	-13,0%	-8,3%
Processed meat	526	569	539	8,2%	-5,3%	2,5%

M€ / 11 months	2019	2020	2021	2020/2019	2021/2020	2021/2019
Total food	69 401	78 423	75 087	13,0%	-4,3%	8,2%
Total meat	14 278	15 990	15 001	12,0%	-6,2%	5,1%
Meat Chicken	2 471	2 739	2 585	10,8%	-5,6%	4,6%
Meat Pork	2 713	3 169	2 883	16,8%	-9,0%	6,3%
Beef Beef	2 184	2 403	2 214	10,0%	-7,9%	1,4%
Rabbit meat	273	292	254	6,8%	-13,1%	-7,2%
Sheep meat goat meat	669	727	667	8,6%	-8,3%	-0,4%
Processed meat	4 729	5 298	5 152	12,0%	-2,8%	8,9%


Source : Ministerio de Agricultura, pesca y alimentacion

## Evolution in value (I)


*Evolución en valor vs. YA y vs. 2YA- YTD*



	YTD 21 vs. 20	YTD 21 vs. 19
<b>ALIMENTACIÓN</b>	<b>-0,6%</b>	<b>7,8%</b>
ALIMENTACION SECA	0,5%	9,4%
CONSERVAS	-5,9%	3,4%
CONGELADOS	-2,6%	11,5%
DERIVADOS LACTEOS	-3,0%	1,8%
PRODUCTOS 4-5 GAMA	10,4%	8,1%
HUEVOS	-2,3%	6,1%



	YTD 21 vs. 20	YTD 21 vs. 19
<b>FRESCOS</b>	<b>-2,5%</b>	<b>6,8%</b>
CARNE	-3,5%	7,7%
CHARCUTERIA	-0,7%	4,7%
FRUTAS	-1,7%	10,2%
VERDURAS Y HORTALIZAS	-6,5%	4,8%
QUESOS	-0,8%	8,5%
PESCADO	-1,1%	6,0%
MARISCO	-3,4%	2,2%



	YTD 21 vs. 20	YTD 21 vs. 19
<b>BEBIDAS</b>	<b>1,4%</b>	<b>8,8%</b>
LECHES Y BATIDOS	-2,9%	1,5%
CERVEZAS	-1,1%	19,3%
BEBIDAS REFRESCANTES	6,8%	10,8%
VINOS	-4,0%	8,9%
BEBIDAS ESPIRITUOSAS	9,6%	15,5%
AGUAS	3,1%	2,4%
ZUMOS	4,5%	-6,5%
BEBIDAS VEGETALES	1,5%	14,1%
ESPUMOSOS	7,7%	7,0%

Source: IRI, data : november 2021

## Evolution in value (II)

*Evolución en valor vs. YA y vs. 2YA- TAM*



### ALIMENTACIÓN

	TAM 21 vs. 20	TAM 21 vs. 19
ALIMENTACION SECA	0,9%	9,2%
CONSERVAS	-5,2%	3,4%
CONGELADOS	-1,7%	11,8%
DERIVADOS LACTEOS	-2,4%	2,0%
PRODUCTOS 4-5 GAMA	9,2%	7,8%
HUEVOS	-2,0%	5,4%



### FRESCOS

	TAM 21 vs. 20	TAM 21 vs. 19
CARNE	-2,6%	8,0%
CHARCUTERIA	-0,4%	4,9%
FRUTAS	-1,4%	10,4%
VERDURAS Y HORTALIZAS	-5,5%	5,5%
QUESOS	-0,2%	9,0%
PESCADO	-0,1%	6,5%
MARISCO	-1,3%	3,2%



### BEBIDAS

	TAM 21 vs. 20	TAM 21 vs. 19
LECHES Y BATIDOS	-2,5%	1,6%
CERVEZAS	0,3%	19,8%
BEBIDAS REFRESCANTES	6,2%	10,2%
VINOS	-2,3%	9,3%
BEBIDAS ESPIRITUOSAS	9,3%	14,9%
AGUAS	2,7%	2,1%
ZUMOS	3,1%	-6,9%
BEBIDAS VEGETALES	2,2%	14,3%
ESPUMOSOS	3,8%	4,1%

Source: IRI, november 2021

# Spain

## KPIs



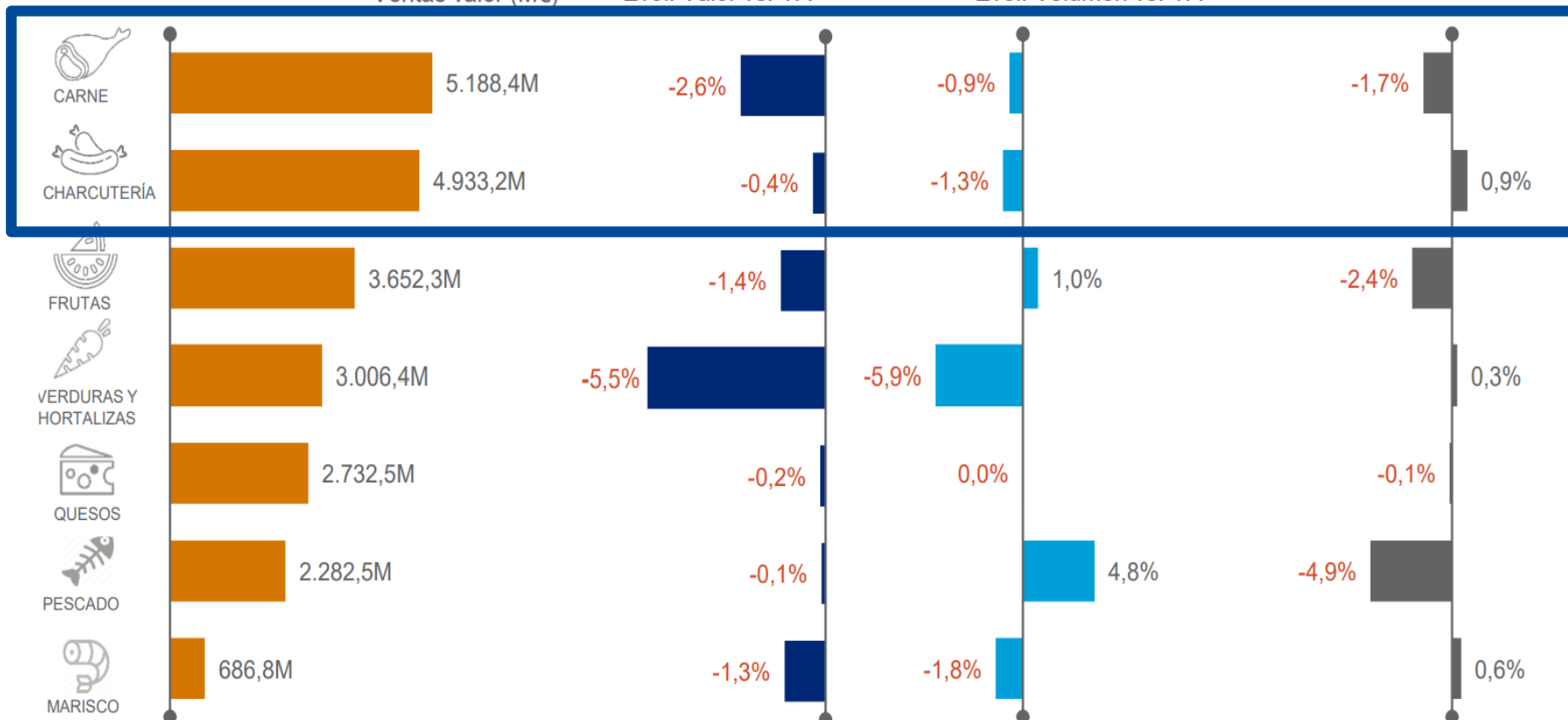
### Frescos

Ventas valor (M€)

Evol. Valor vs. YA

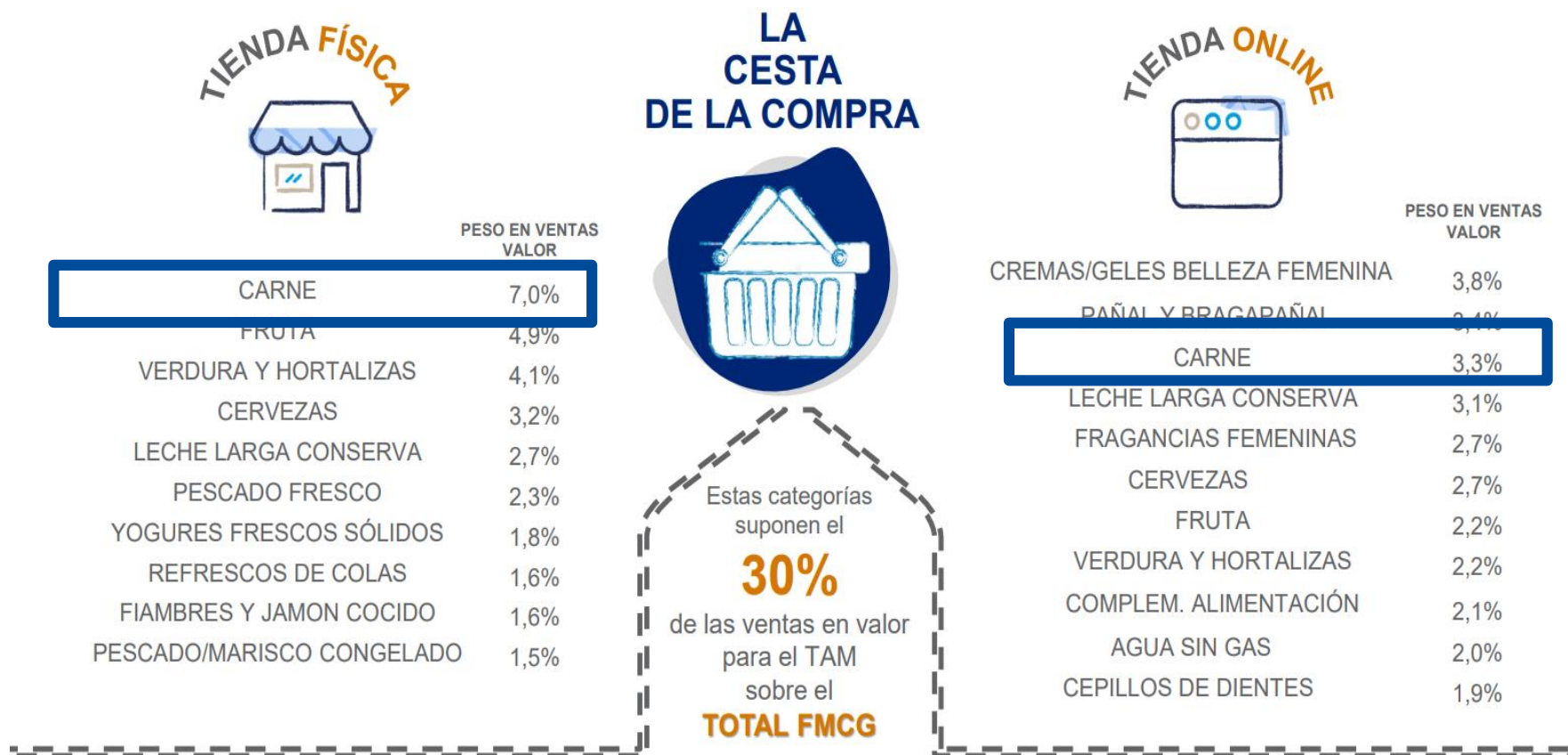
Evol. Volumen vs. YA

Evol. Precio/ Vol. vs. YA



Source: IRI, nov 2021

### Análisis de la cesta de la compra física vs. online



Source: IRI, nov 2021