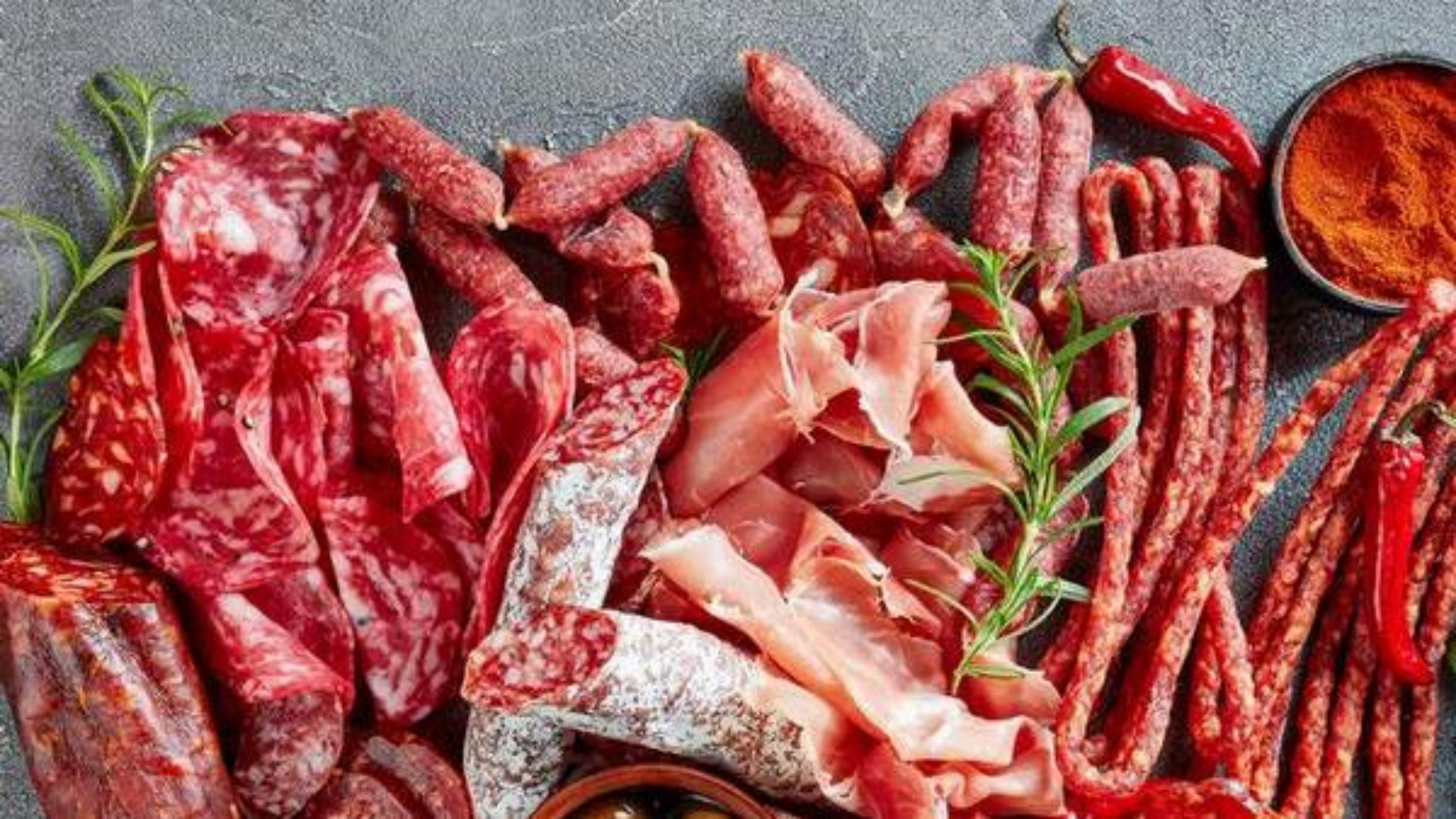


European Commission

Robert Volut – CLITRAVI

MEAT MARKET OBSERVATORY – ECONOMIC BOARD

22 February 2022

CLITRAVI

CENTRE DE LIAISON DES
INDUSTRIES TRANSFORMATRICES DE VIANDES DE L'U.E.
LIAISON CENTRE FOR THE
MEAT PROCESSING INDUSTRY IN THE E. U.

PRESENTATION

- CLITRAVI
- THE EU MEAT PROCESSING SECTOR. DATA
- THE EU MEAT PROCESSING SECTOR. TRENDS
- MAIN CONCERNS
- WHAT WE NEED

CLITRAVI

- The Liaison Centre for the Meat Processing Industry in the European Union (CLITRAVI) is the professional organization whose aim is to represent the interest of the European Meat Processing Industry. The association was established in 1958.

- CLITRAVI has 26 member organizations in the different European Countries (EU MS + Norway, Switzerland and UK)

- Members of: **Board** of FoodDrinkEurope, International Meat Secretariat and European Livestock Voice;

- Issues of interest:

Nutrition and health

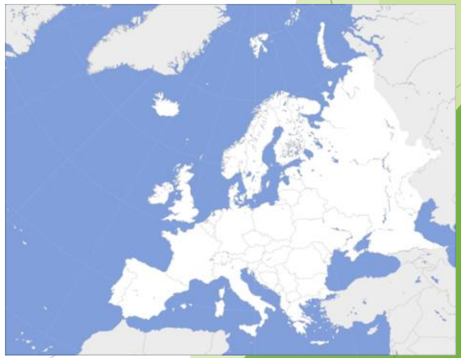
Product safety and hygiene

Technical aspects
quality, labelling...

Environmental sustainability

Economical aspects
supply chain, trade within the eu and with third countries

Animal welfare



THE EU MEAT PROCESSING SECTOR - DATA

Where Does Europe sit Within Global Processed Meat?

- One of the most popular European food, synonymous of conviviality
- Vast majority of companies = SMEs located in rural areas
- Meat processors = Meat chefs (= cuisiniers de la viande).
- More than 1000 different products recipes – savoir faire
- Exports extra-EU: 9,3 billions € (11%)
- Positive trade balance
- 8% of the EU food industry turnover (3rd sector)
- Processing: 71% pigmeat, 17% poultry, 8% beef, 4% others (global sourcing)
- Strong historical relationship with EU farmers: more than 2/3 of EU pigmeat processed by our sector

European Meat Processing Industry

Turnover
84 Billions

Employees
380.000

Production
15 M Tonnes

Companies
13.500

Data 2019
Sources: Eurostat, OECD, FAO.

THE EU MEAT PROCESSING SECTOR – TRENDS

- Consumers’ demands: 1) Ready-to eat and convenient food 2) Taste and tradition 3) Healthy and environmentally friendly food

- Consumers shift to value. Less but better (PDO and PGI, but not only). **Promotion is playing an important role**

- Sales: decrease in volume. Criticism against the sector

- More naturality

- Consumers want more information (origin, ingredients, raw materials, environmental footprint)

- SMEs vs Big retailers. Continued difficult relationship with retailers. Big chains continue developing private label vs processors’ brands. Very difficult to get prices adaptation

- Food and raw material safety first

- Less plastic packaging

MAIN CONCERNS

- Relationship with retailers. Difficult to be able to adapt prices to factual economic environment (energy prices, freight, raw materials, labor cost, etc.)

- Negative attacks against meat (due to a divisive debate on a political perspective)

- African Swine Fever

- Societal challenges: waste reduction, energy savings, nutrition, lifestyle, etc.

- Productivity and services to consumers: digitalization, etc.

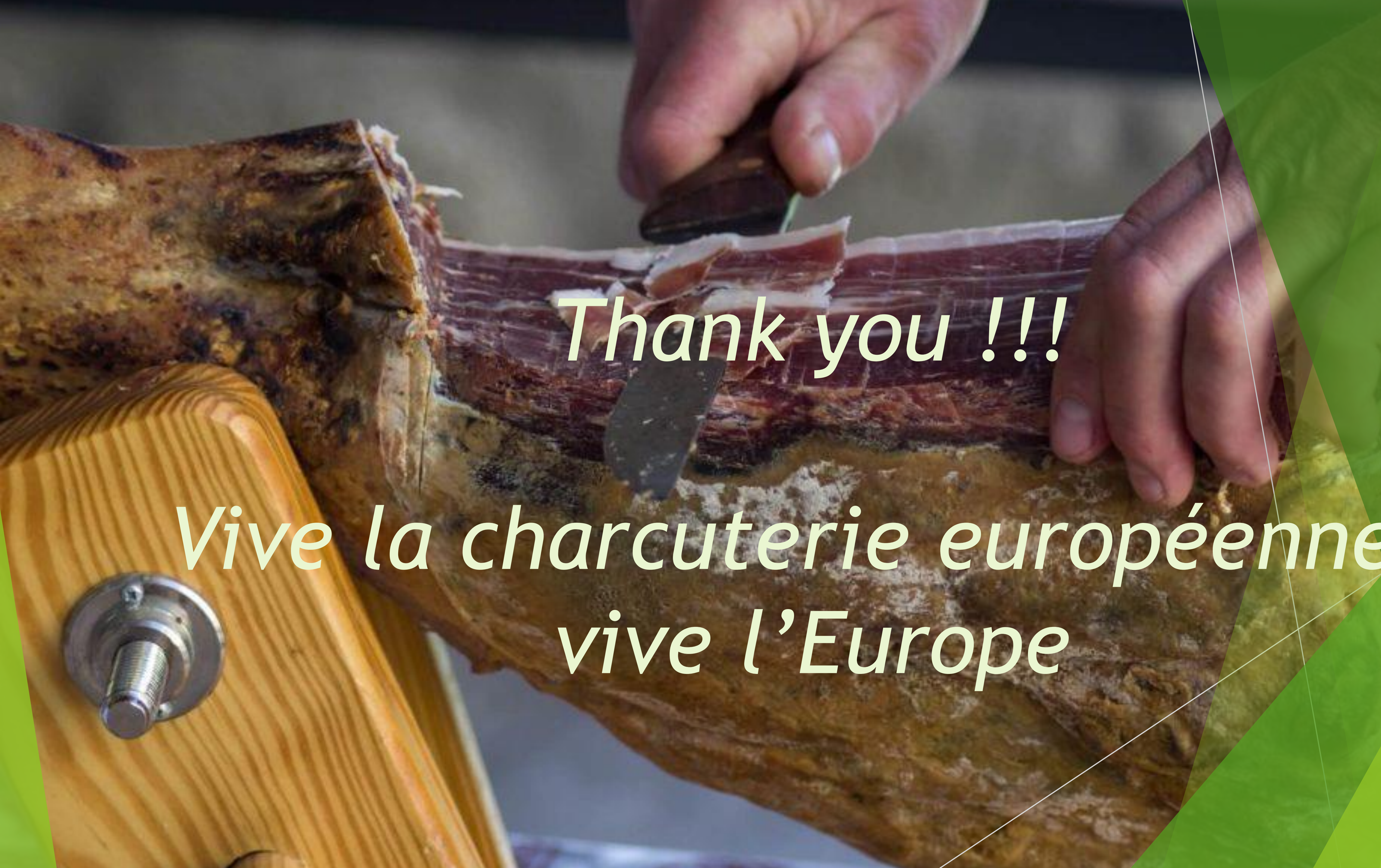
- Lack of harmonization in the Internal Market (COOL + FOPNL + animal welfare + different implementation of legislation)

WHAT WE NEED

- Harmonization in the Internal Market
- Science and no ideology in the debate
- Economic sustainability onboard
- Better enforcement of Unfair Trading Practices
- Inclusive promotion schemes
- Strong support to R&I for our SMEs

And overall

Less divisive debate (we are part of the solution)



Thank you !!!

Vive la charcuterie européenne , vive l’Europe