

# THE EU AGRICULTURAL OUTLOOK FOR MEAT AND DAIRY

## Session 8

THE 2019  
**EU AGRICULTURAL  
OUTLOOK CONFERENCE**

Sustainability  
from Farm  
to Fork





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# Trishna Shah

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Euromonitor international



# The impact of plant-based products on meat & dairy in the EU

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Trishna Shah: Consultant, Food and Nutrition at Euromonitor International

# Milk Aisle in 2014



Source image: New York Times Website

# Milk Aisle Today

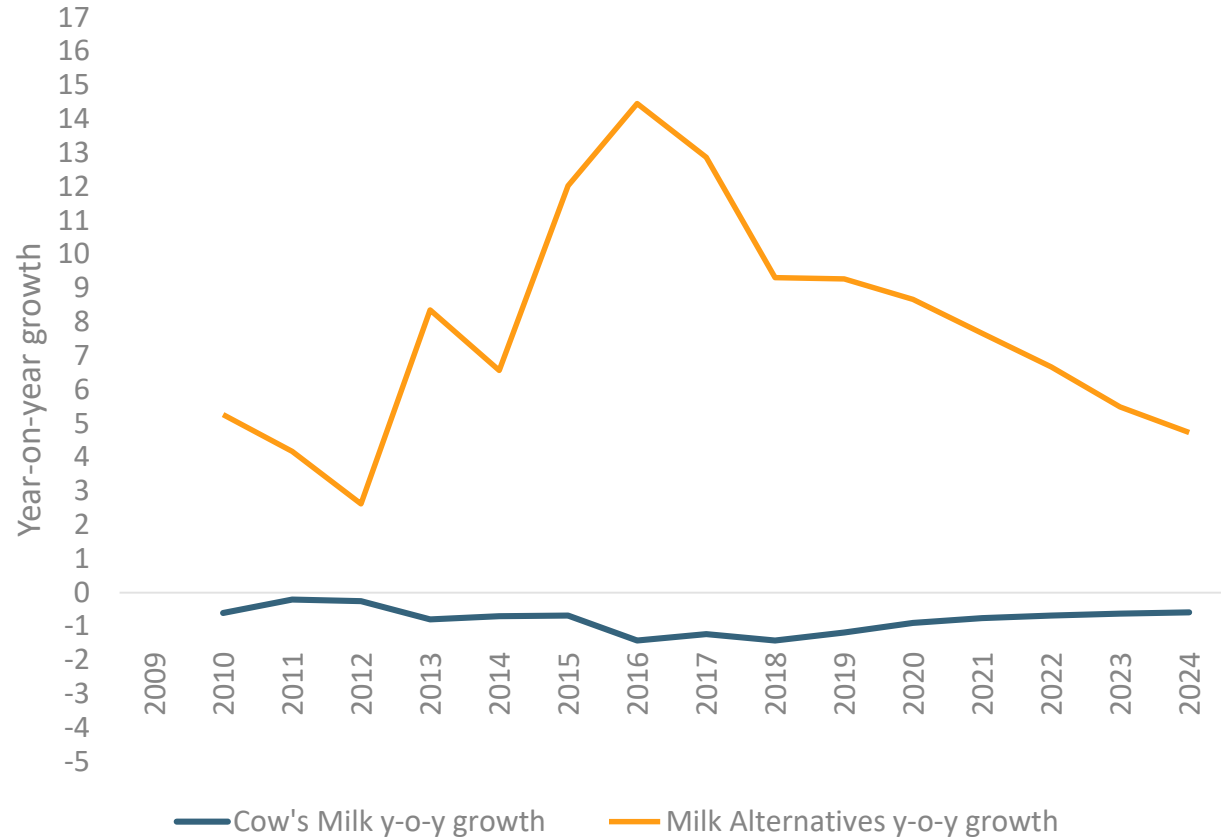


Source image: Adam Smith Website



# Cow's Milk vs. Milk Alternatives: EU Total Volume and Growth 2009-2024

Million Litres



**29 billion**  
Litres of cow's milk sold in the EU in 2019

**-1 billion**  
Litres of cows milk expected to be sold between 2019-2024

**+488 million**  
Litres of milk alternatives expected to be sold between 2019-2024

## Western European markets shape dairy preferences

Largest forecast volume declines in cow's milk 2019-24



Largest forecast volume growth in milk alternatives 2019-24







£3 New   £3 New   £3 New   £3 New   £3.30 New   £5 New   £5

MEAT-FREE NEW   MEAT-FREE NEW   VEGANI   VEGANI   VEGANI   VEGANI   VEGANI

£2.50 New   £2.50   £2.50   £2.50   £2.50   £2.50

NEW   MEAT FREE   MEAT FREE   MEAT FREE

£2.75 New   £2.75 New   £2.75 New   £2.75 New   £1.50   £2   £2.50

PIECES   PIECES   PIECES   PIECES   PIECES   PIECES   PIECES

£3.20   £2.50   £2.30   £3   £3 New   £2.50

PIECES   PIECES   A BEST OF BRITISH SAUSAGES   A BEST OF BRITISH SAUSAGES   A WILD GARLIC & PARLEY SAUSAGES   A WILD GARLIC & PARLEY SAUSAGES   VEGETARIAN SAUSAGES   VEGETARIAN SAUSAGES

£2.50   £1.75



£3.25 Save 55p



£3.25 Save 55p



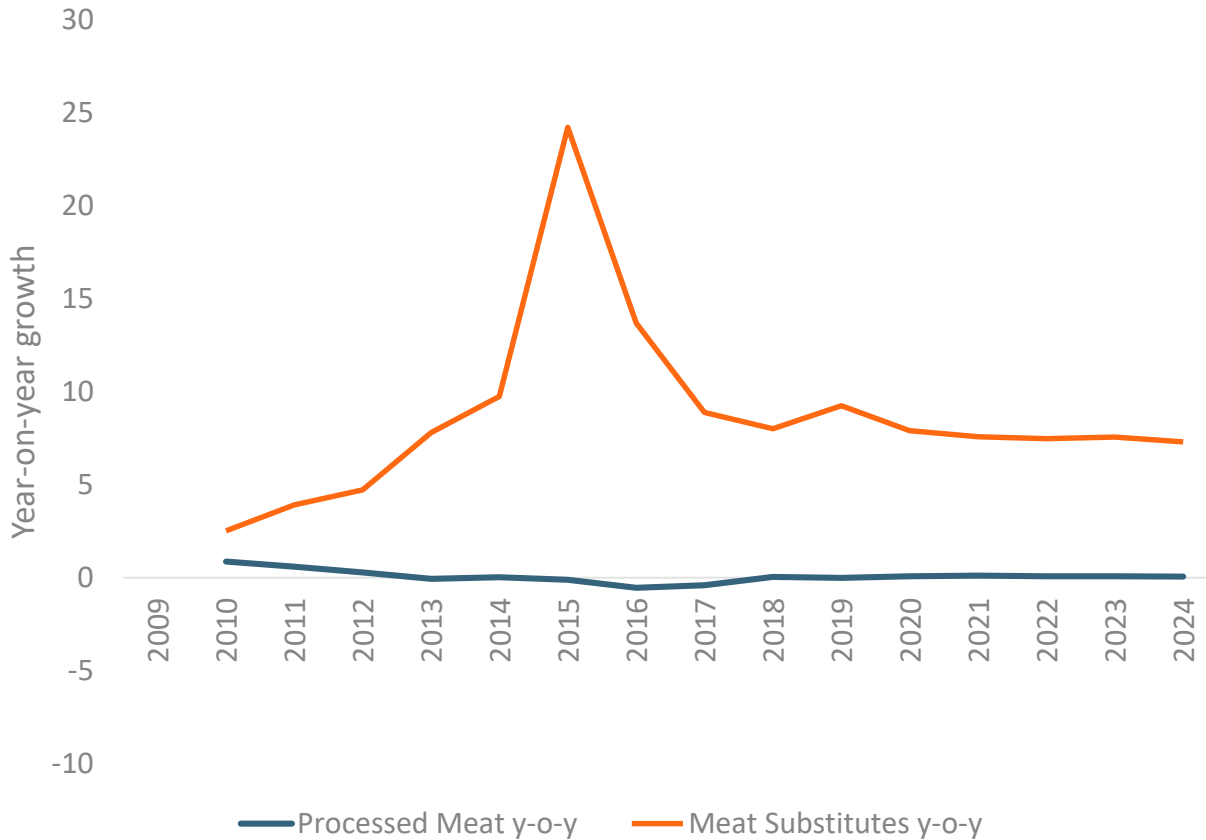
£3.25 Save 55p



£8 Save 95p



# Processed Meat vs. Meat Substitutes: EU Total Volume and Growth 2009-2024 000's Tonnes



# 7.3 million

Tonnes of processed meat sold  
in the EU in 2019

# +28,100

Tonnes of processed meat  
forecast to be sold between  
2019-2024, EU

# +62,900

Tonnes of meat alternatives  
forecast to be sold between  
2019-2024, EU



## UK unrivalled in meat substitutes market

Largest forecast volume declines in processed meat 2019-24



Largest forecast volume growth in meat substitutes 2019-24





More plant-based  
food

Better, but less  
meat

# Avoiding meat and dairy is 'single biggest way' to reduce your impact on Earth

Biggest analysis to date reveals huge footprint of livestock - it provides just 18% of calories but takes up 83% of farmland



Source image: Guardian website



Source image: Live Kindly website

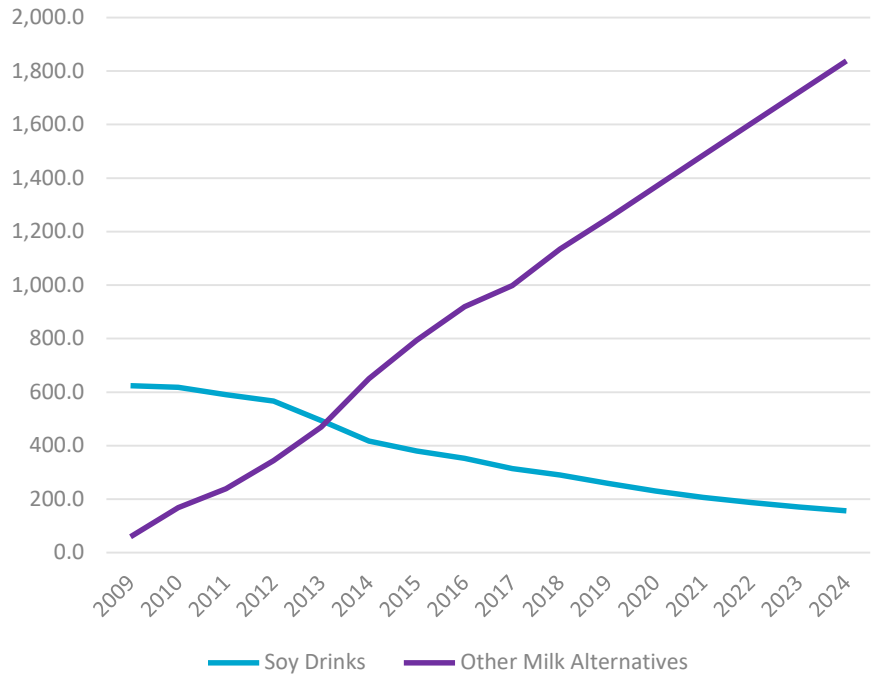


Source image: Mirror website

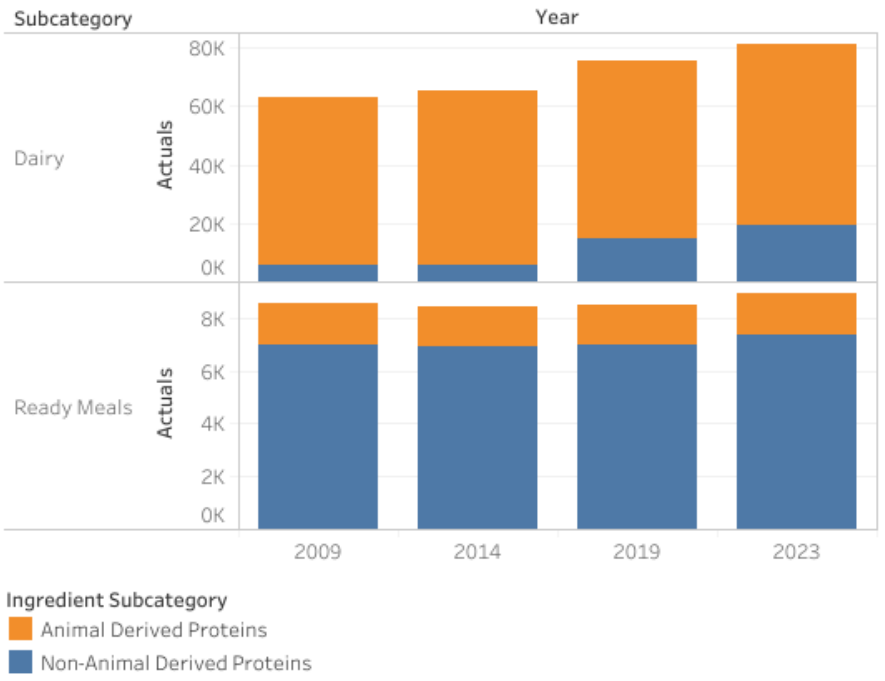


# Lessons from the leader: US

US: Volume growth in types of milk alternatives



Changing landscape of proteins in the US 2009-2023  
000's Tonnes



# 318%

Increase in front-of-pack grass-fed/pasture-raised claims on dairy products in Western Europe 2015-19



Source image: Irish Central Website



Source image: Carrefour Website

# €238m

Absolute value growth of organic chilled processed meat and seafood in Western Europe 2015-19



HEALTHY



PROCESSED





# Beef burger

7

ingredients

## Waitrose 2 rump steak burgers

**INGREDIENTS:** British beef (94%), tapioca starch, sea salt, black pepper, preservative sodium sulphite, antioxidant sodium ascorbate

**ALLERGY ADVICE:** For allergens see ingredients in bold.

**Preparation:** Remove all packaging. Wash hands all surfaces and utensils after touching raw meat.

GRILL	CHILLED
MEDIUM HEAT	14-18 mins

Preheat grill. Remove all packaging. Place on grill rack under a medium heat, turning occasionally until thoroughly cooked, the juices run clear and there is no pink meat.

PAN FRY	CHILLED
MEDIUM HEAT	14-18 mins

Heat 1 tsp of oil in a frying pan. Place burgers into the pan, turning occasionally until thoroughly cooked, the juices run clear and there is no pink meat.

TYPICAL AS PREPARED	100g	BURGER
Energy kJ	927	1019
Energy kcal	222	244
Fat	11.5g	12.7g
Of which saturates	4.7g	5.2g
Carbohydrate	4.1g	4.5g
Of which sugars	<0.5g	<0.5g
Fibre	0.6g	0.7g
Protein	25.1g	27.6g
Salt	0.60g	0.66g

waitrose.com/nutrition

This pack contains 2 servings.

Ri = % of your daily reference intake.

300ge

Produced in the UK from British beef for Waitrose Limited

UK  
2045  
EC

# Plant-based burger

20+

ingredients

## BEYOND BURGER - THE FUTURE

IT'S A NEW BREED OF BURGER. MADE FROM PLANTS.  
JOIN IN #BEYONDBURGER #BEYONDMEAT

### VEGANE BURGER AUF ERBSENPROTEINBASIS, AUFGETAUT / GALETTES VÉGÉTALES À BASE DE PROTÉINES DE PETITS POIS, DÉCONGELÉS

**ZUTATEN:** Wasser, Erbsenproteinisolat\* (16%), Rapsöl, raffiniertes Kokosmosöl, Aroma, Raucharoma, Stabilisatoren: Cellulose, Methylcellulose, Gummi Arabicum, Kartoffelstärke, Maltodextrin, Hefeextrakt, Salz, Sonnenblumenöl, Träckerhefe, Antioxidationsmittel: Ascorbinsäure, Essigsäure; Farbstoff: Beerenrot, modifizierte Stärke, Apfelextrakt, Zitronensaftkonzentrat.

\*Erbsen sind Hülsenfrüchte. Menschen mit schweren Allergien auf Hülsenfrüchte wie Erdnüsse sollten vorsichtig sein, wenn sie Erbsenprotein in ihre Ernährung aufnehmen, da die Gefahr von Erbsenallergie besteht. Enthält keine Erdnüsse oder Nüsse.

**INGREDIENTS:** eau, isolat de protéine de pois\* (16%), huile de colza, huile de noix de coco raffinée, arôme, arôme de fumée, stabilisants: cellulose, méthylcellulose, gomme arabique; fécula de pomme de terre, maltodextrine, extrait de levure, sel, huile de tournesol, levure séchée, antioxydants: acide ascorbique, acide acétique; colorant: rouge de betterave; amidon modifié, extrait de pomme, jus de citron concentré.

\*Les pois sont des légumineuses. Les personnes qui souffrent d'allergies sévères aux légumineuses telles que les arachides doivent faire preuve de prudence lorsqu'elles introduisent des protéines de pois dans leur alimentation en raison d'une possible allergie aux pois. Sans arachides ou noix.

### ZUBEREITUNGSEMPFEHLUNG / CONSEILS DE PRÉPARATION

- KÜHL AUFBEWAHREN UND INNERHALB VON 3 TAGEN NACH DEM ÖFFNEN VERBRAUCHEN. NICHT WIEDER EINFRIEREN. VOR DEM SERVIEREN VOLLSTÄNDIG GAREN.
- DEN GRILL ODER DIE PFANNE AUF MITTLERE BIS HOHE HITZE VORHEIZEN UND DEN BEYOND BURGER\* VON JEDER SEITE CA. 3 MINUTEN GRILLEN ODER BRATEN.
- NICHT ZU STARK GAREN. DAS INNERE DES PATTIES BLEIBT AUCH NACH DEM GAREN ROSA.
- VOLLSTÄNDIG GEGART, WENN DIE KERNTemperatur 74°C ERREICHT HAT.

- CONSERVER DANS UN ENDROIT FRAIS ET CONSOMMER DANS LES 3 JOURS SUIVANT L'OUVERTURE. NE PAS RECONGELER. CUIRE COMPLÈTEMENT AVANT DE SERVIR.
- PRÉCHAUFFER LE GRIL OU LA POËLE À FEU DE MOYEN À FORT ET CUIRE LE BEYOND BURGER\* 3 MINUTES DE CHAQUE CÔTÉ.
- NE PAS TROP CUIRE. L'INTÉRIEUR DE LA GALETTE RESTE ROSÉ MÊME APRÈS CUISON.
- COMPLÈTEMENT CUIT LORSQUE LA TEMPÉRATURE À CŒUR A ATTEINT 74°C.

Durchschnittliche Nährwerte / Valeurs nutritives moyennes

	pro 100 g / pour 100 g
Brennwert / Énergie	1120 kJ / 269 kcal
Fett / Matières grasses	19 g
- davon gesättigte Fettsäuren / - dont acides gras saturés	4,4 g
Kohlenhydrate / Glucides	5,3 g
- davon Zucker / - dont sucres	0 g
Eiweiß / Protéines	18 g
Salz / Sel	1,1 g

Bei max. +7°C zu verbrauchen (siehe Aufdruck) / Conservé à max. +7°C, peut être consommé jusqu'à: voir emballage  
Allein Feinost GmbH & Co. KG • Brägelner Straße 110 • D-49393 Lohne  
FULLGEWICHT: 227ge (2 x 113,5 g)  
POIDS NET: 227ge (2 x 113,5 g)

# Thank you

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