



DG AGRI Meat Market Observatory

A retail perspective
2 March 2023

France

FMCG : households are looking for ways to save money

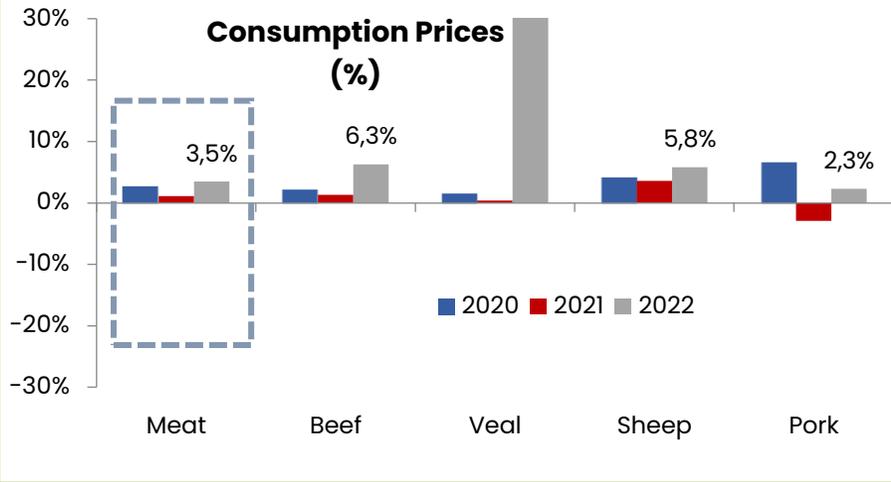
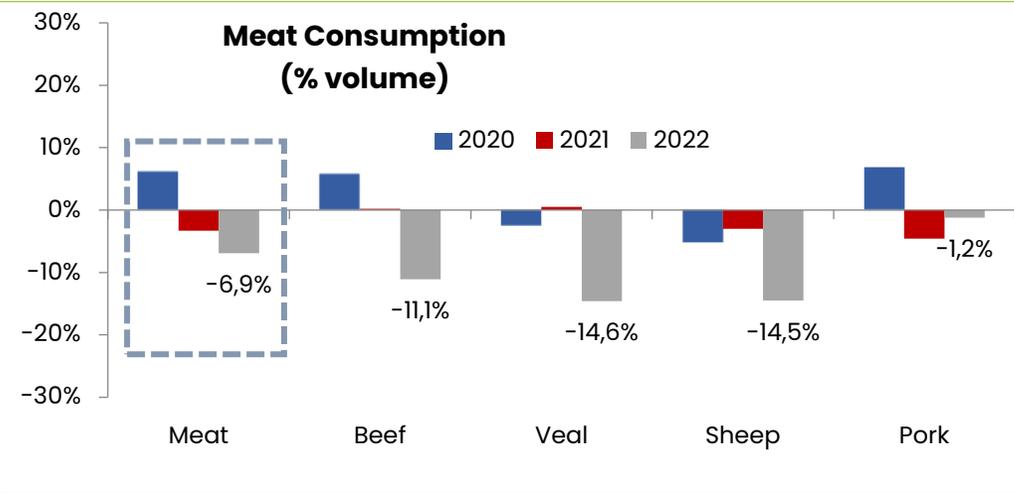
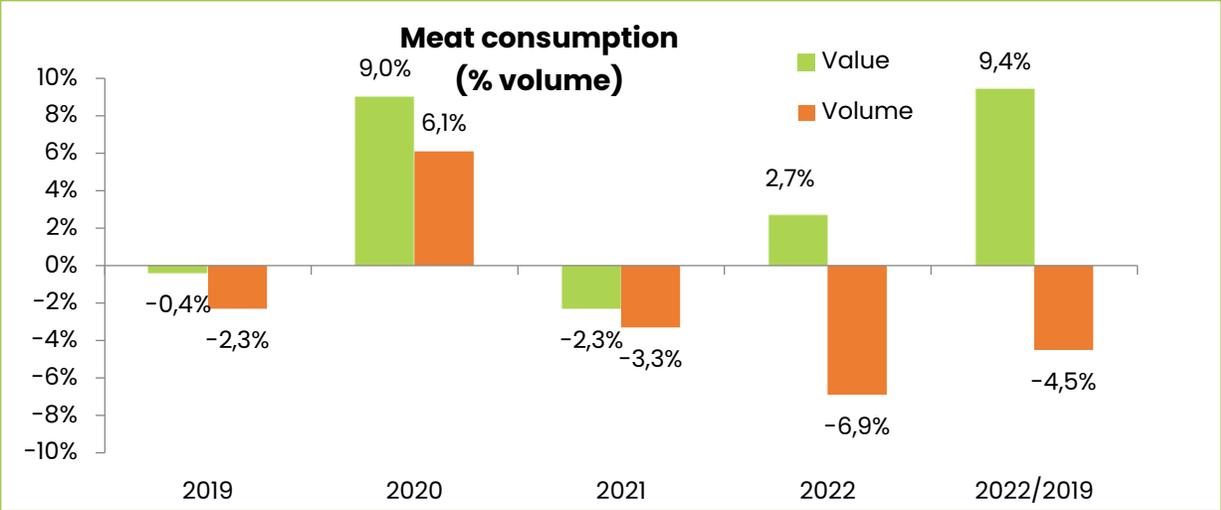
According to NielsenIQ:

- 49% compare prices more carefully
- 48% try to buy more on promotion
- 43% take advantage of discounted prices on products that are close to their expiration date
- **39% buy less meat or fish**
- 37% are more careful when shopping to reduce food waste

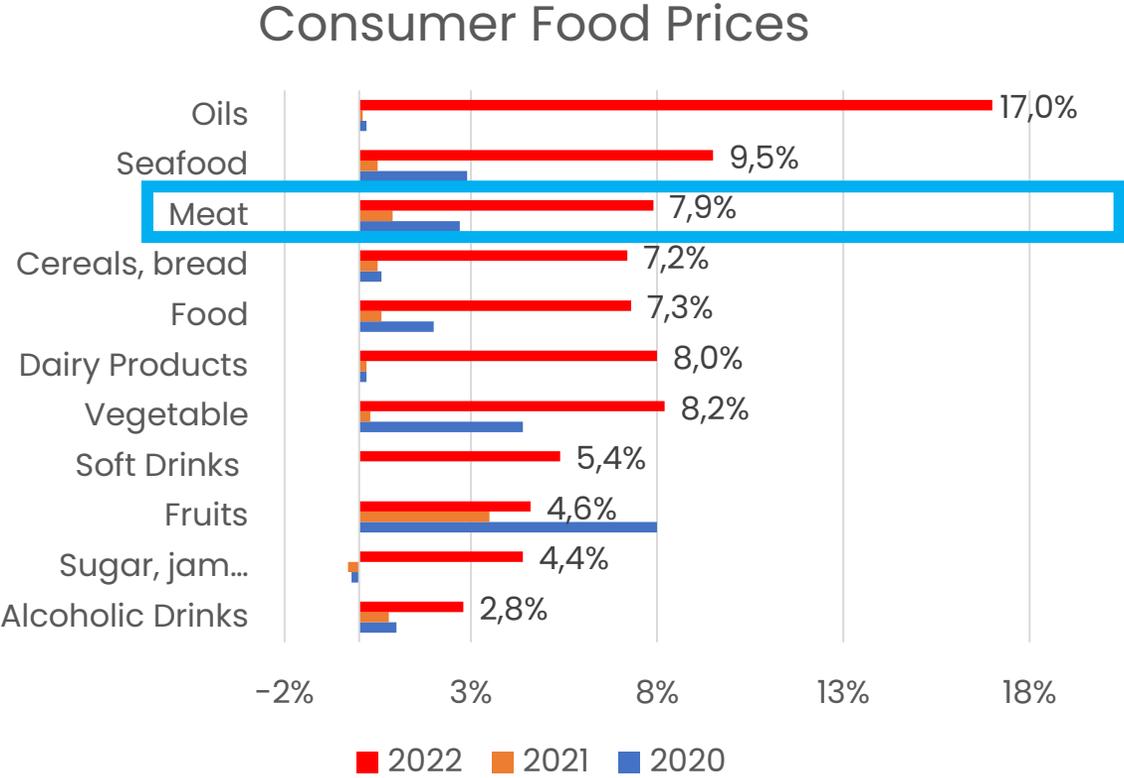
Source: NielsenIQ



Meat consumption and prices



Food inflation

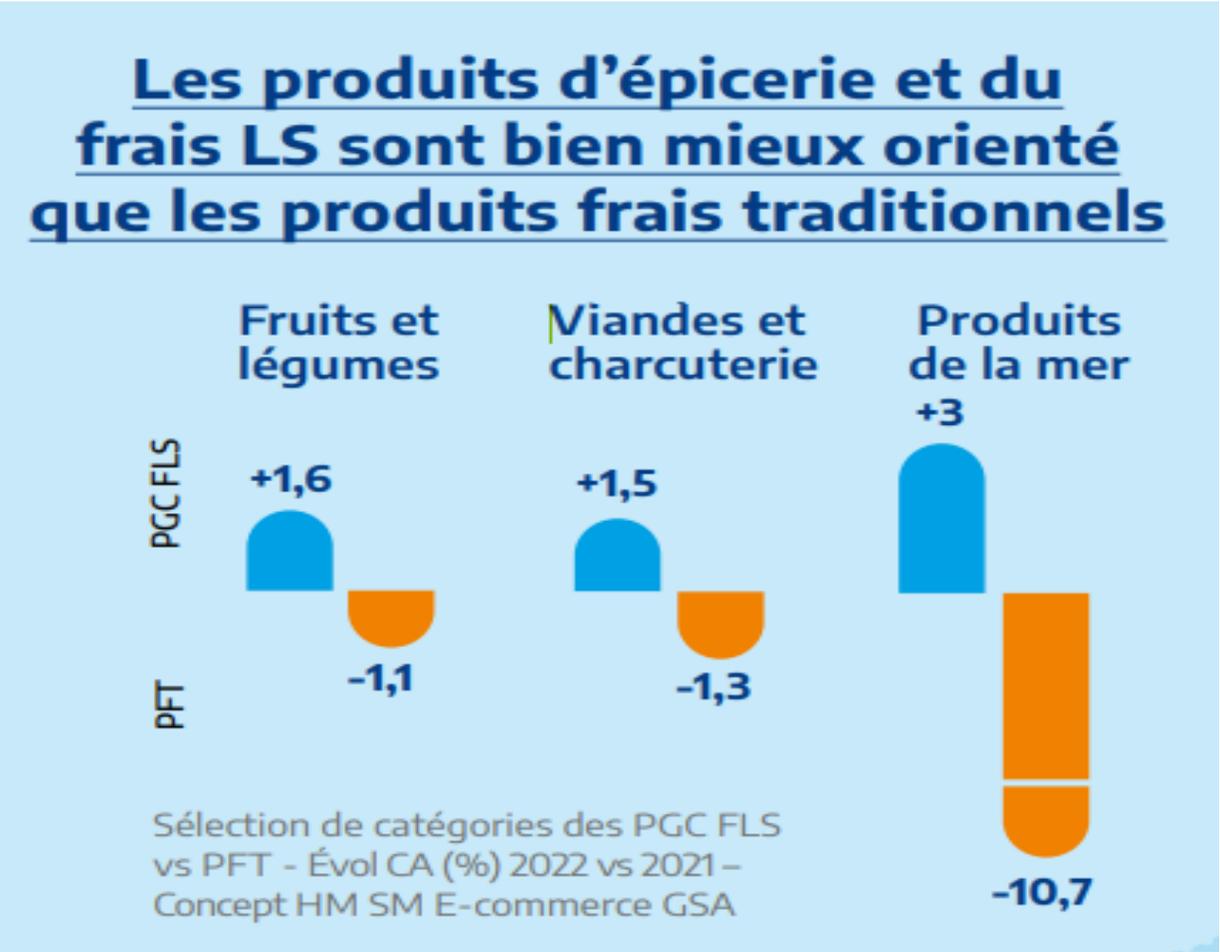


	2022	Dec 2022 / Dec 2021
Food	7,3%	10,6%
Meat	7,9%	14,0%
Beef	8,9%	13,1%
Pork	6,1%	11,0%
Poultry	11,8%	17,7%
Lamb	9,7%	11,2%
Dried, salted, smoked meat	6,8%	13,8%

Source: INSEE

Focus on fresh food in hypermarkets and supermarkets

Source: IRI (hypermarkets, supermarkets, e-commerce)



Organic markets – all products

Evolution des ventes et de l'offre bio

Evolution (%) – Total PGC FLS Bio - Tous circuits GSA (hors EDPM allemandes et france pour l'offre)



CAM : -3,5%

CC : -3,6%

CAM : -8,2%

CC : -14,2%

CAM : -10,0%

CC : -13,6%



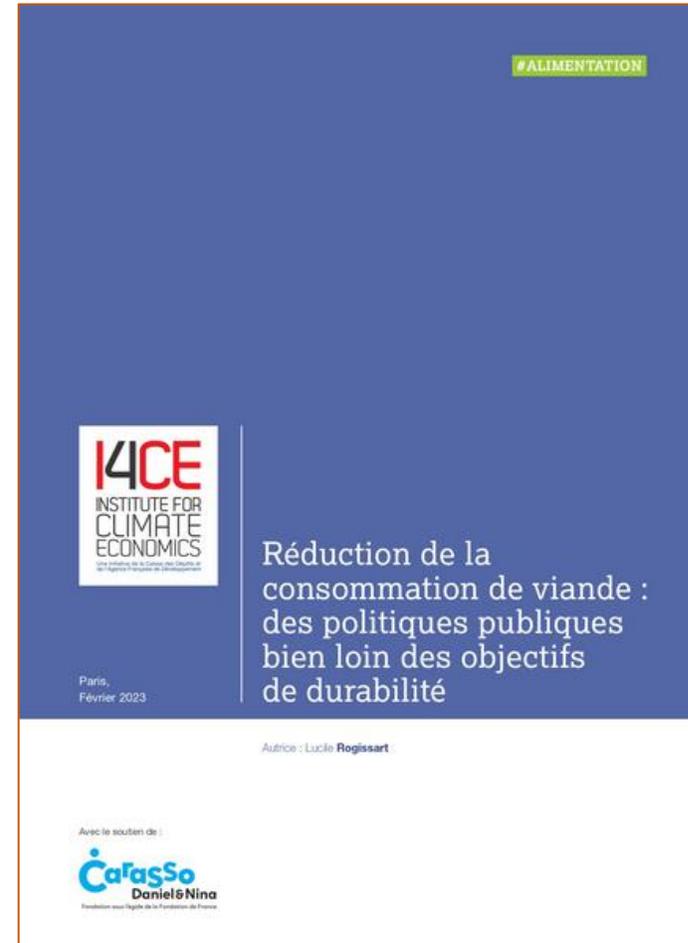
Context (1): pressure to reduce meat consumption

New publication by I4CE - Institute for Climate Economics **"Reducing meat consumption: public policies far from sustainability goals"** (February 2023):

✓ I4CE looks back in this report at the different scenarios for reducing meat consumption (targets ranging from -20% to -70% of individual meat consumption between 2015 and 2050) and the necessary consistency between production and consumption.

✓ I4CE also analyzes consumption figures: slight individual reduction but overall increase in consumption, and major changes (more poultry, catering, and prepared meals)

✓ I4CE evoked the actions in progress (vegetarian menus in public collective catering, nutritional recommendations, environmental display), and the tracks to be explored (to specify the objectives aimed at in the framework of the revision of the National Low-Carbon Strategy...)



Context (2): pressure to reduce meat consumption

The Action-Climat network (Réseau Action Climat - **RAC**) has published a report (feb. 2023) that points out « the lack of commitment of grocery retailers in favor of sustainable food and the lack of action by the State ».

The RAC indicates that the reduction of emissions related to our food implies reducing emissions from agriculture, which can not be achieved without a **significant reduction in the consumption of animal products**.

The RAC is asking retailers to stop promoting animal products or meat-based products (nuggets, burgers, pizzas...), "except for organic and Label Rouge products", and to promote a more plant-based diet, in particular pulses and other plant-based protein products.



RECOMMANDATIONS AUX ENSEIGNES	52
1. Recommandations prioritaires	52
2. Toutes nos recommandations	53
Pour accélérer la transition agroécologique et soutenir les éleveurs dans la transition	53
Pour accompagner les consommateurs vers le « moins et mieux » de produits d'origine animale	53
Pour accompagner les consommateurs vers une alimentation plus végétale de qualité	53
Pour promouvoir la consommation de produits biologiques	53
Pour rendre l'alimentation durable plus accessible à toutes et tous	54
Pour lutter contre la déforestation importée	54
Pour plus de transparence	54

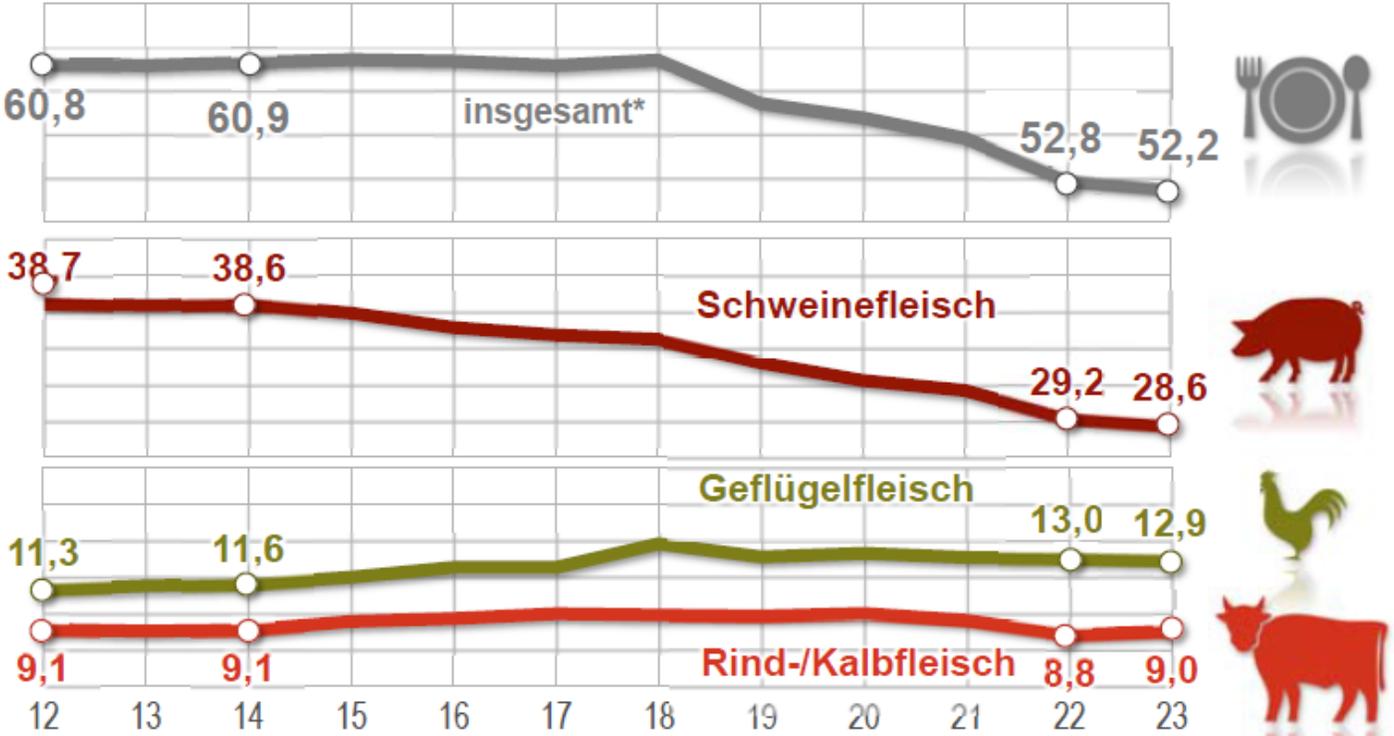
Germany

Meat consumption

Meat consumption continues to decrease

Fleischkonsum wird immer geringer

Pro-Kopf-Verzehr von Fleisch, in Deutschland, in kg/Jahr*



*Nach Abzug von Knochen, Futter, industrieller Verwertung und Verlusten. 2021 vorläufig, 2022 und 2023 geschätzt.

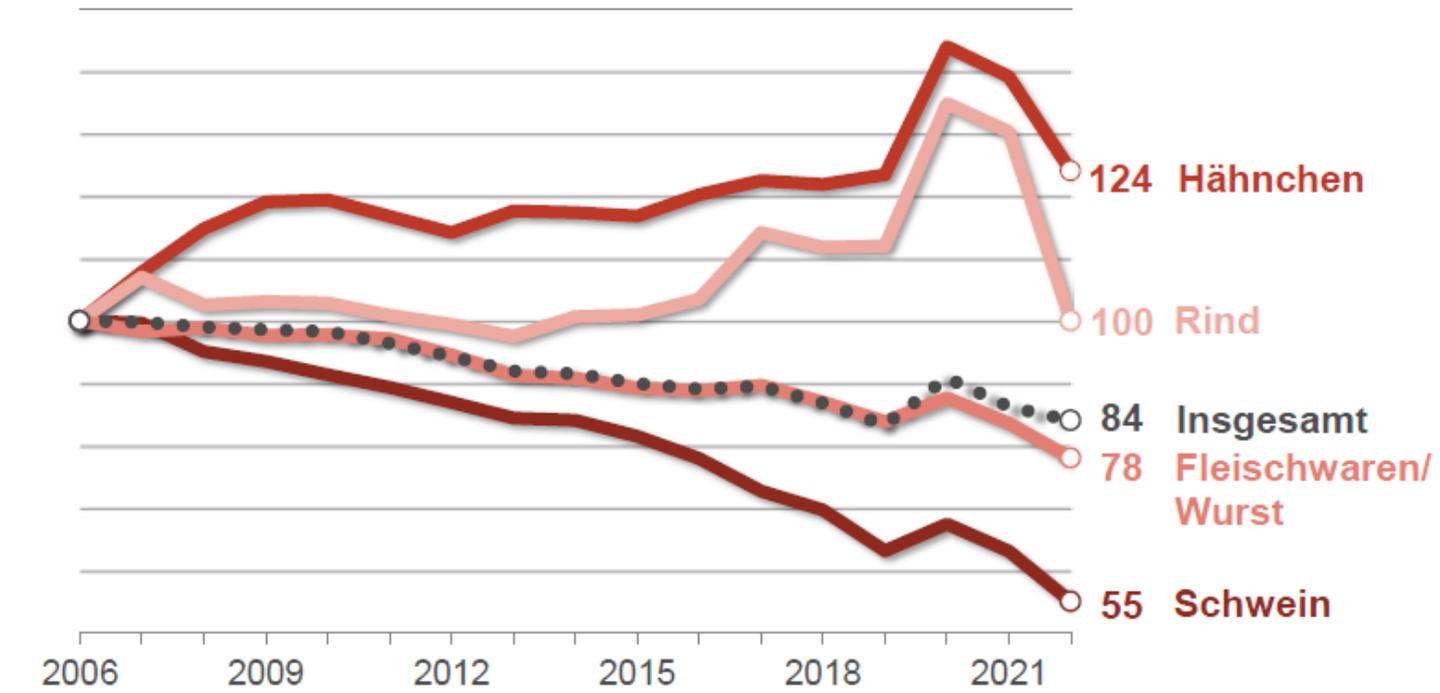
Meat consumption and demand

Decline in demand for meat

Rückgang der privaten Fleischnachfrage



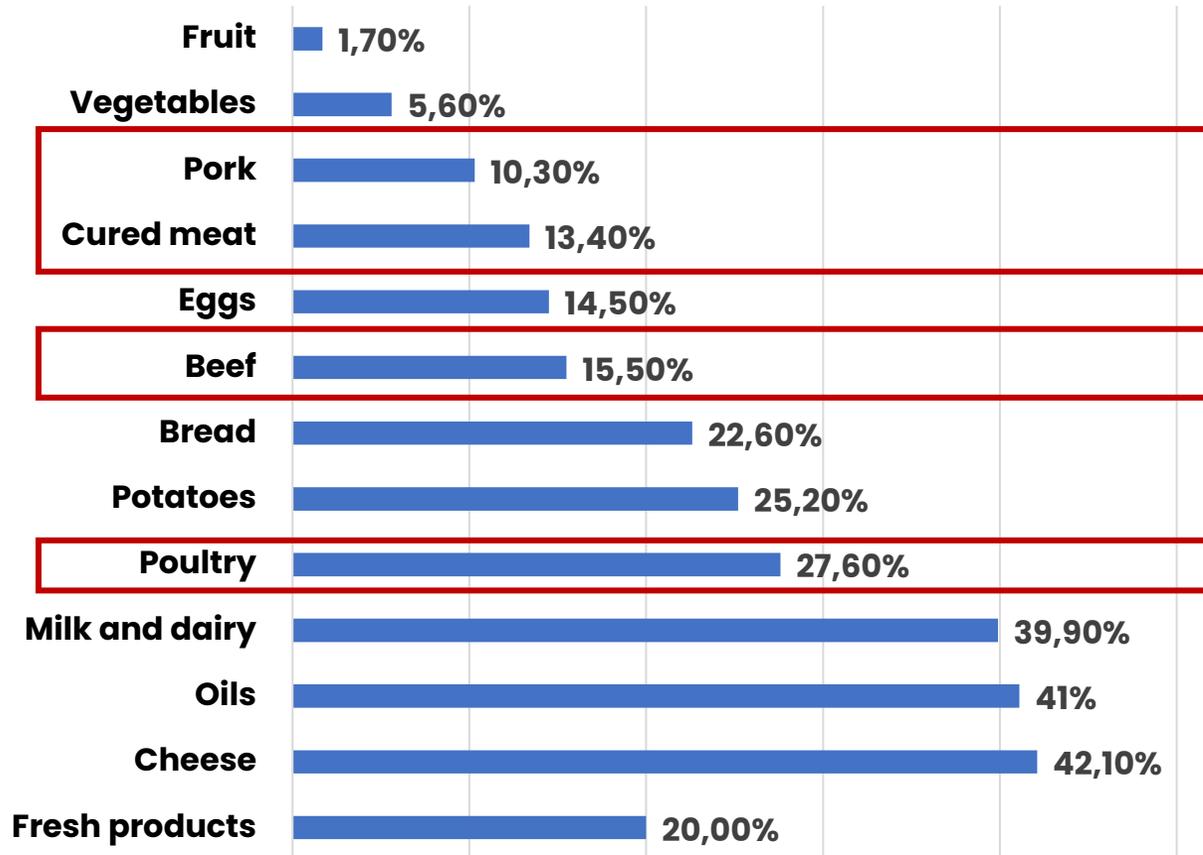
Nachfrage privater Haushalte für Fleisch, Fleischwaren/Wurst und Geflügel in Deutschland; Index Einkaufsmenge (2006 = 100)



ab 2013: Neues Gewichtungsverfahren (CP+); 2022: Hochrechnung vom 18.10.

Inflation

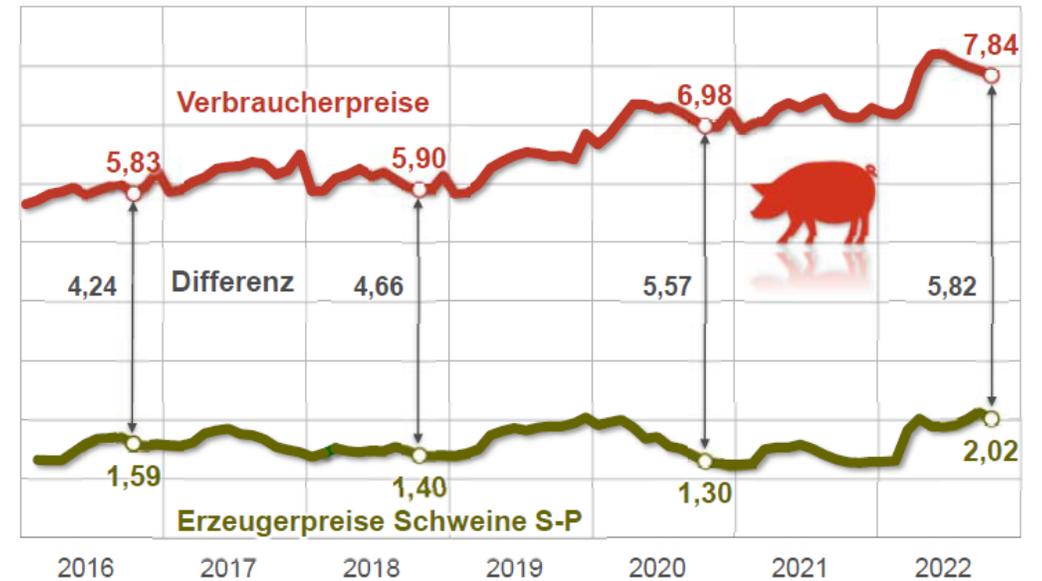
Food inflation – January 2023



Source: AMI

Erzeuger- versus Verbraucherpreise

für konventionell erzeugtes Schweinefleisch in Deutschland,
Monatsmittel in EUR/kg, ohne MwSt.



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Quelle: AMI; BLE

Market range – pork and beef

Marktspanne für Schweinefleisch (Deutschland gesamt)



Marktspanne = Verbraucherpreis abzügl. MwSt abzügl. Erzeugerpreis
Schweinefleisch bis Sep. 2011 Klasse E-P, ab Okt. 2011 S-P
Quelle: Thünen-Institut für Marktanalyse; BLE; LWK Niedersachsen, FB 3.1

Stand: 19.12.2022

Marktspanne für Rindfleisch (Deutschland gesamt)



Marktspannen = Verbraucherpreise abzügl. MwSt abzügl. Erzeugerpreise
Quelle: Thünen-Institut für Marktanalyse; BLE; LWK Niedersachsen, FB 3.1

Stand: 19.12.2022

2023 forecasts

Forecasts for beef

Prognose der Versorgungsbilanz

Für Rindfleisch in Deutschland



	2020	2021	2022*	2023*
Nettoerzeugung (1.000 t)	1.094	1.080	989	↑
Verbrauch (1.000 t)	1.209	1.162	1.078	↑
Pro-Kopf Verzehr (kg/Jahr)	10,0	9,6	8,8	↑
Jungbullen R3 (EUR/kg)	3,56	4,07	5,10	→
Kühe O3 (EUR/kg)	2,60	3,23	4,39	→

Stand: 14.11.2022

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Quelle: AMI / vTI

Forecasts for pork

Prognose der Versorgungsbilanz

In Deutschland



	2020	2021	2022*	2023*
Nettoerzeugung (1.000 t)	5.117	4.971	4.472	↓
Fleischausfuhr (1.000 t)	2.367	2.321	2.030	↓
Fleischeinfuhr (1.000 t)	977	984	954	→
Verbrauch (1.000 t)	3.727	3.635	3.480	↓
Pro-Kopf Verzehr (kg/Jahr)	32,3	31,5	29,2	↓
Schweinepreis E (EUR/kg)	1,60	1,36	1,82	↑
Ferkelpreis 28 kg (EUR/St.)	55	38	48	↑

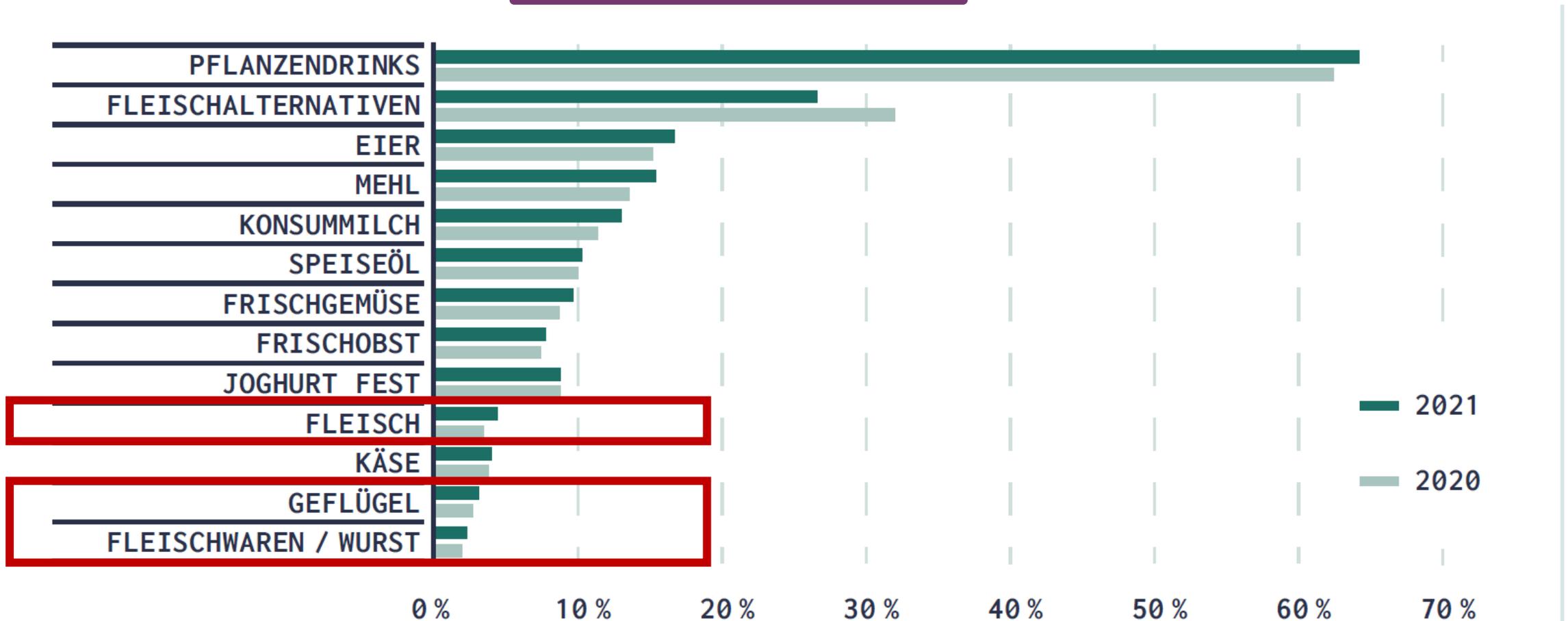
*Prognose vom 18.10.2022

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Quelle: AMI / vTI

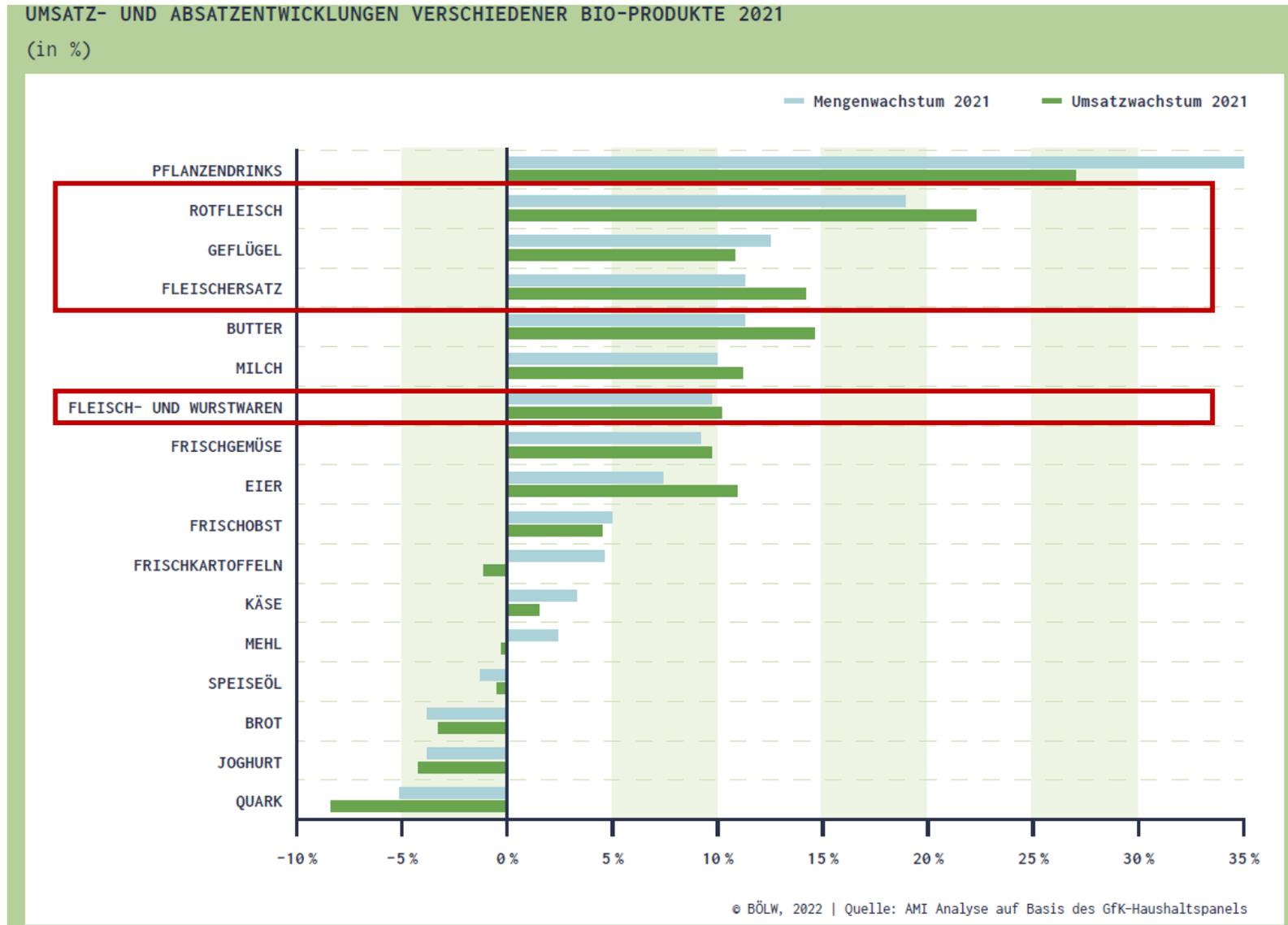
Organic meat market – organic products in fresh sales

Comparison 2021 to 2020 (in %)

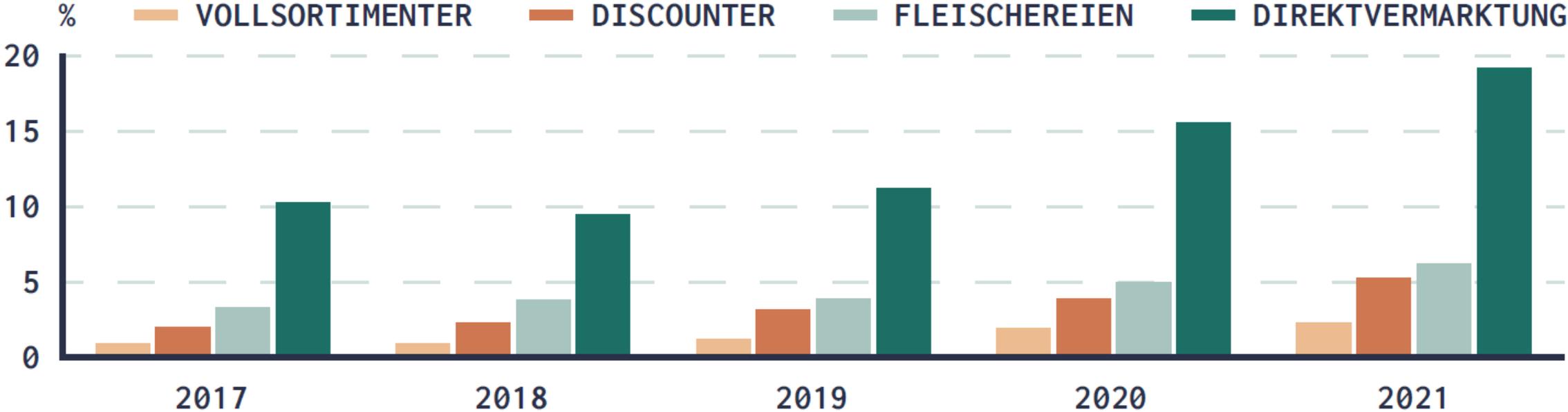


© BÖLW, 2022 | Quelle: AMI nach GfK-Haushaltspanel

Organic meat market – development of sales (volume and turnover) in 2021

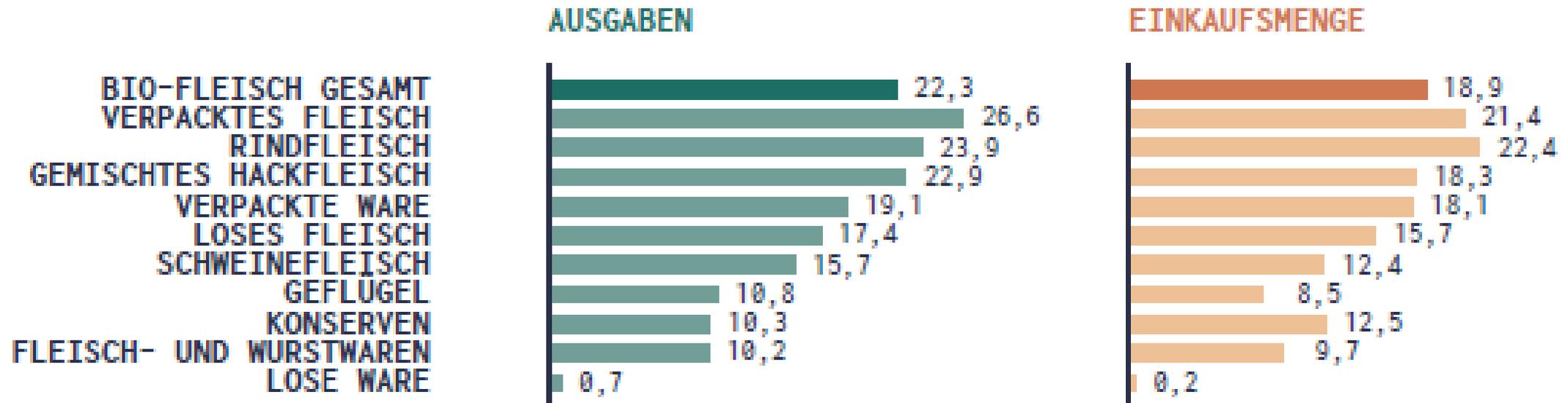


Organic meat market – share of organic meat purchases per type of retail store



© BÖLW, 2022 | Quelle: AMI nach GfK-Haushaltspanel

Organic meat market – sales variation of organic meat in 2021 compared to 2020 (in %)



© BÖLW, 2022 | Quelle: AMI nach GfK-Haushaltspanel

Organic meat market – costs for the supply chain

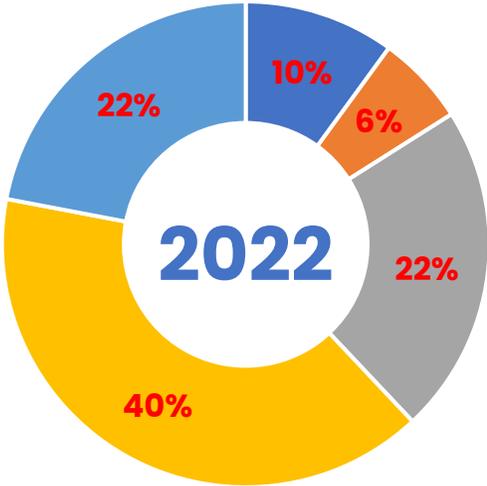
Handel mit Labelfleisch verursacht höhere Kosten als Marketing und Handel mit „gewöhnlichem“ Fleisch



Italy

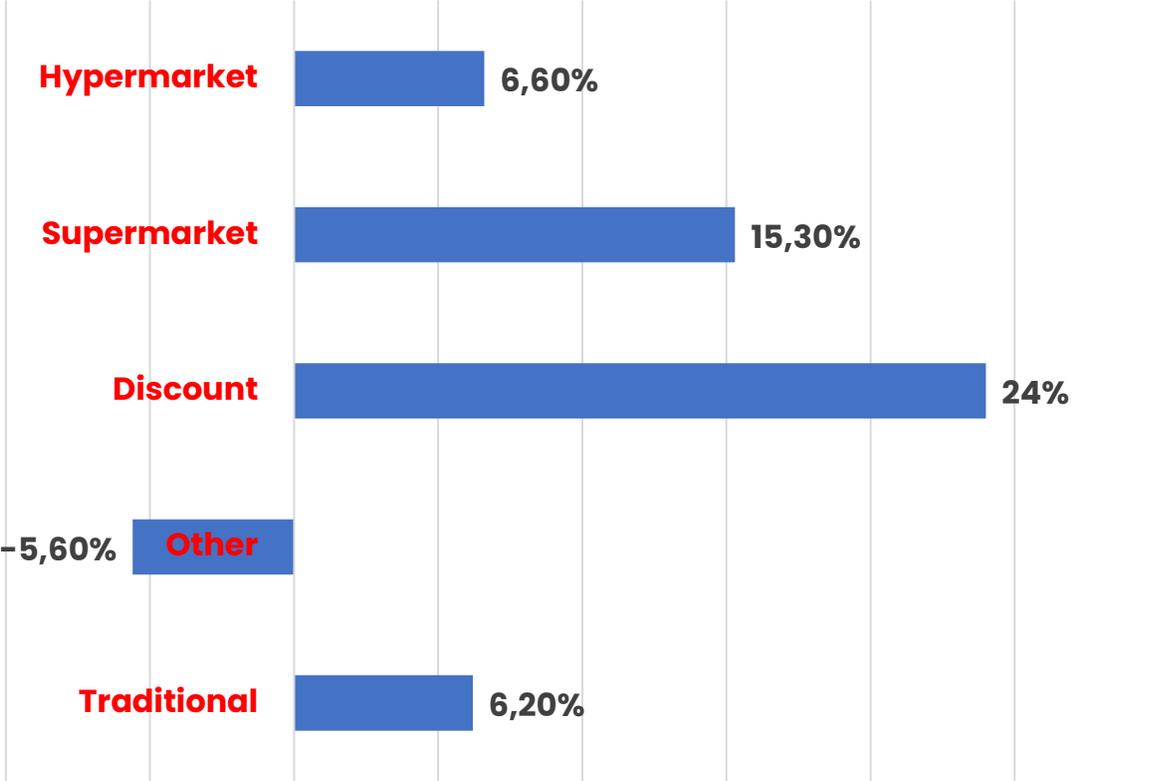
Retail channels in times of crisis

Turnover by type of retail



- Traditional ■ Other ■ Discount
- Supermarkets ■ Hypermarkets

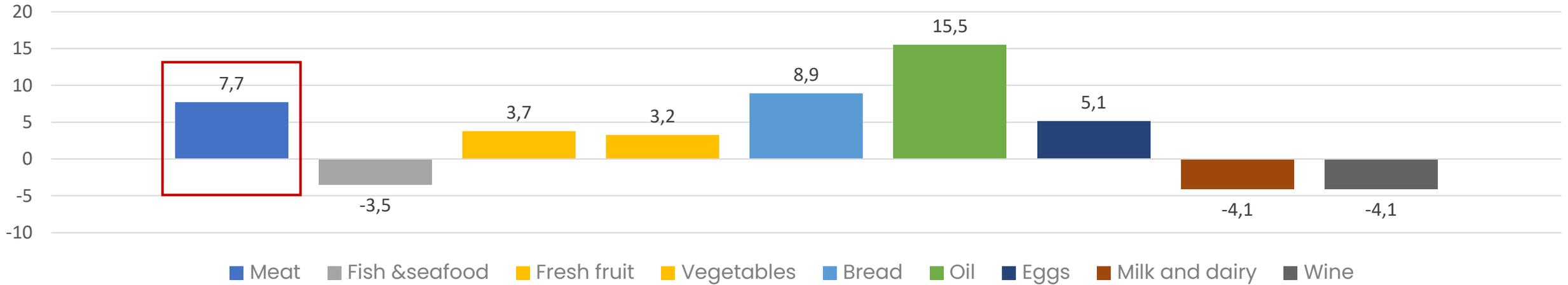
Turnover variation by type of retail (2019 vs 2022)



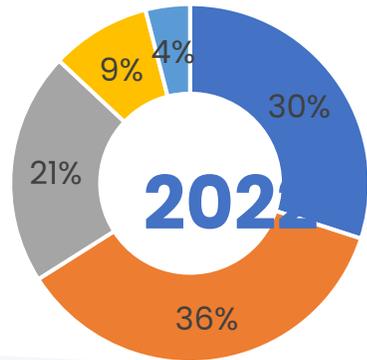
Source: ISMEA

Meat markets in 2022

Food home consumption (value changes vs October 2021)

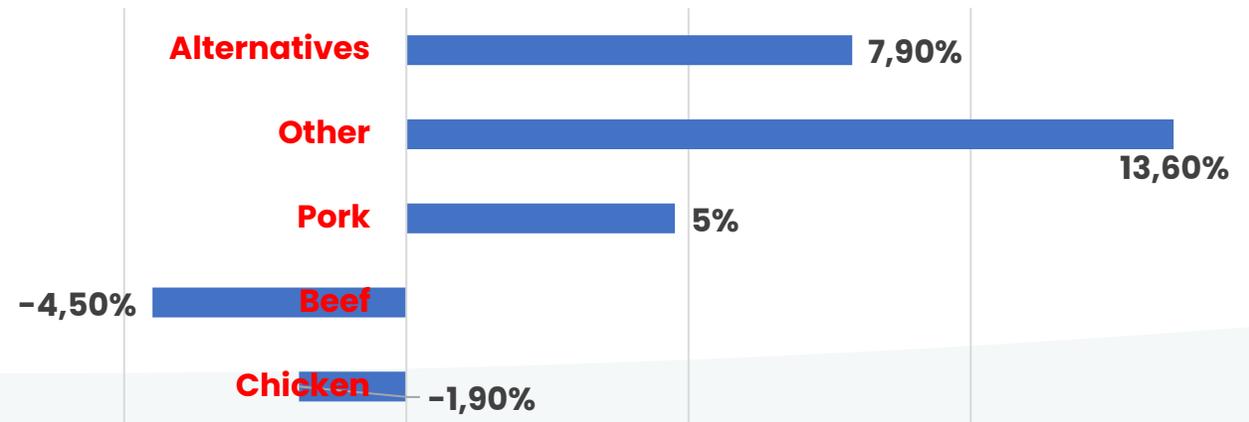


Meat shopping basket in 2022



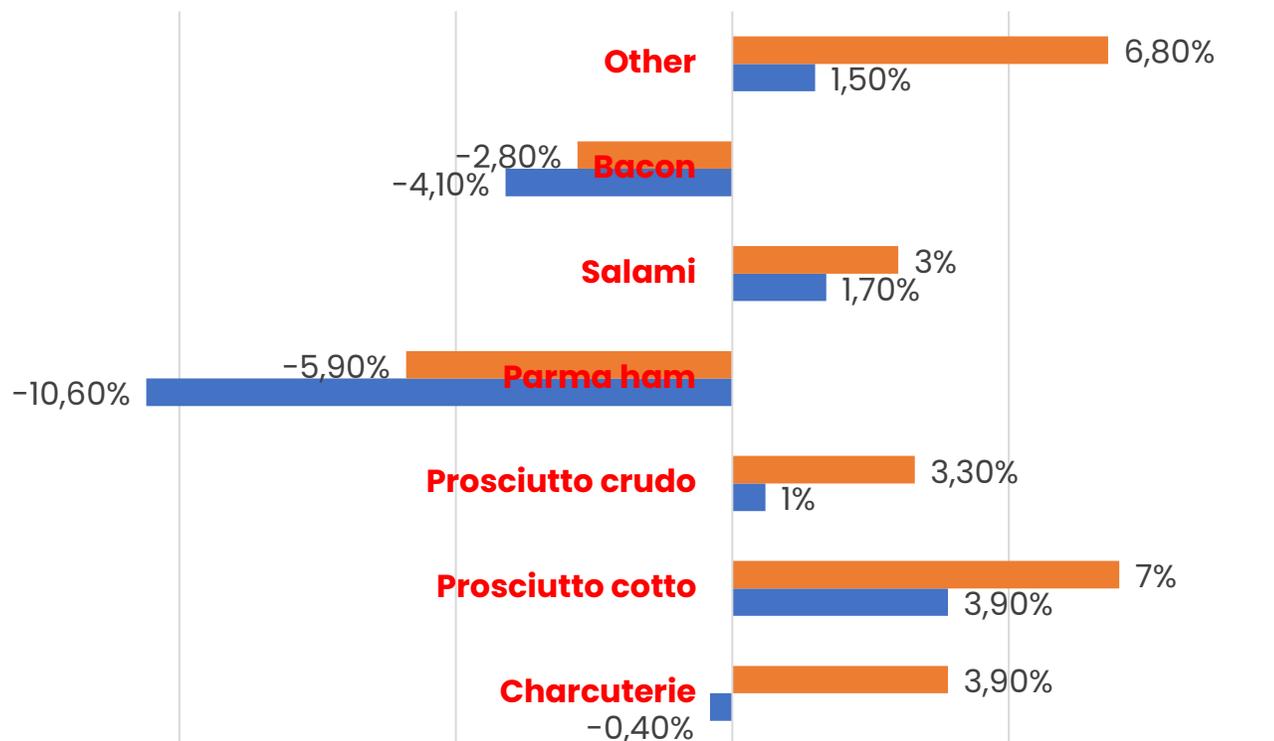
■ Beef ■ Poultry ■ Pork ■ Other meat ■ Alternatives

Volume changes in Oct 2022 (vs Oct 2021)



Meat markets in 2022: prices and cured meat

Volume and value changes in Oct 2022 (vs Oct 2021)

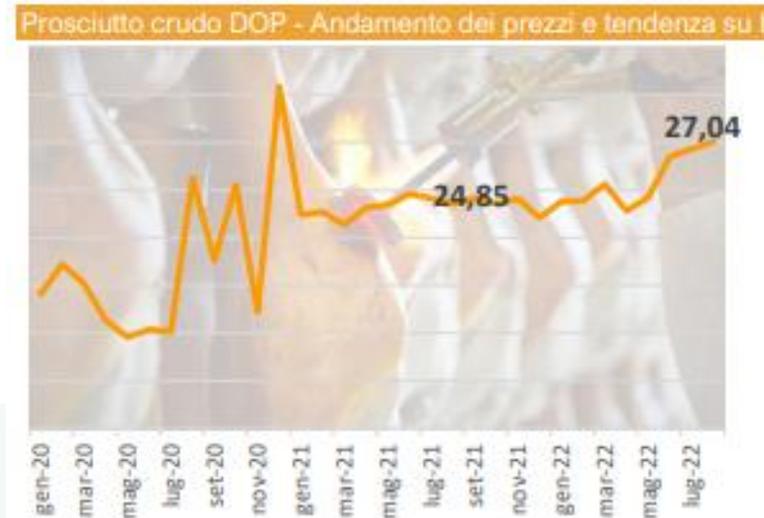


Source: ISMEA



Fonte: Elaborazioni ISMEA su dati NielsenIQ - Consumer Panel

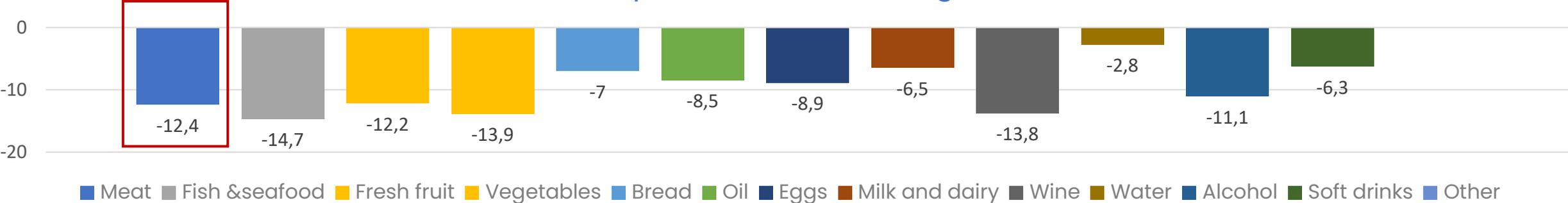
Retail prices for beef slices and ham



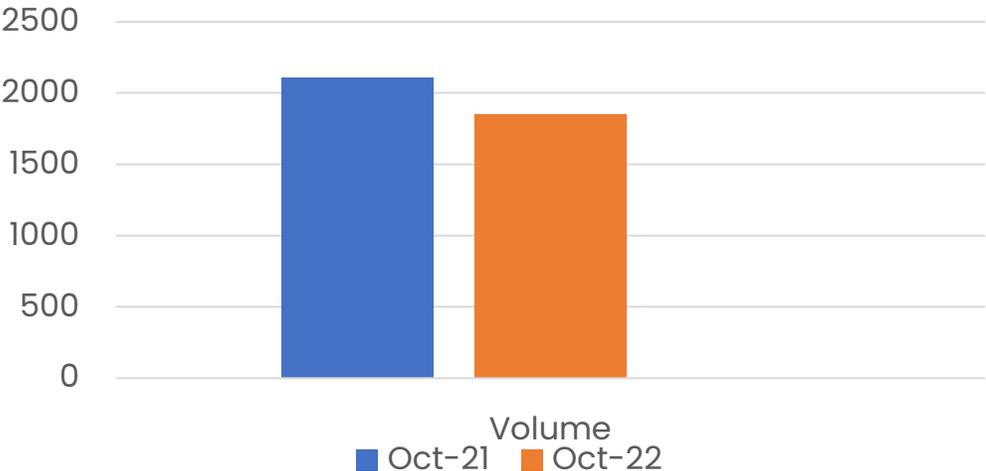
Spain

Meat consumption in 2022

Food home consumption (volume changes vs October 2021)



Volume (million kg)



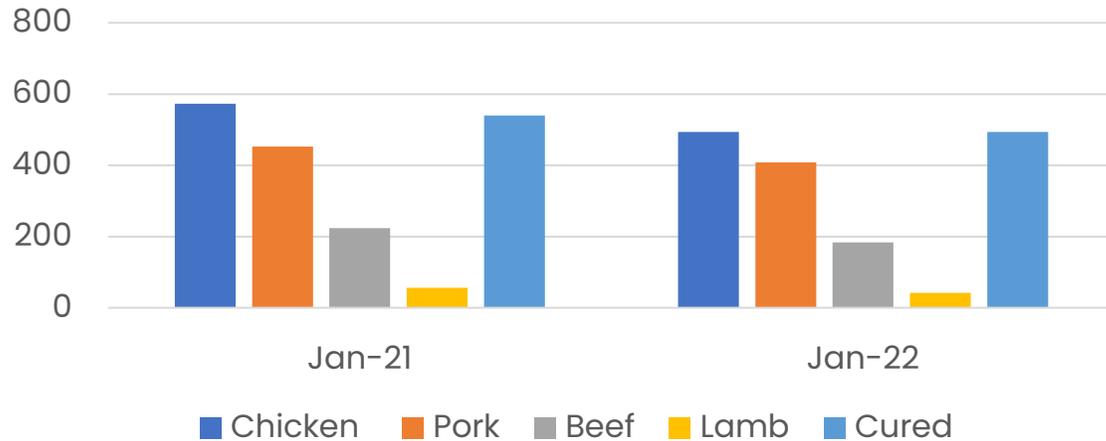
Value (EUR million)



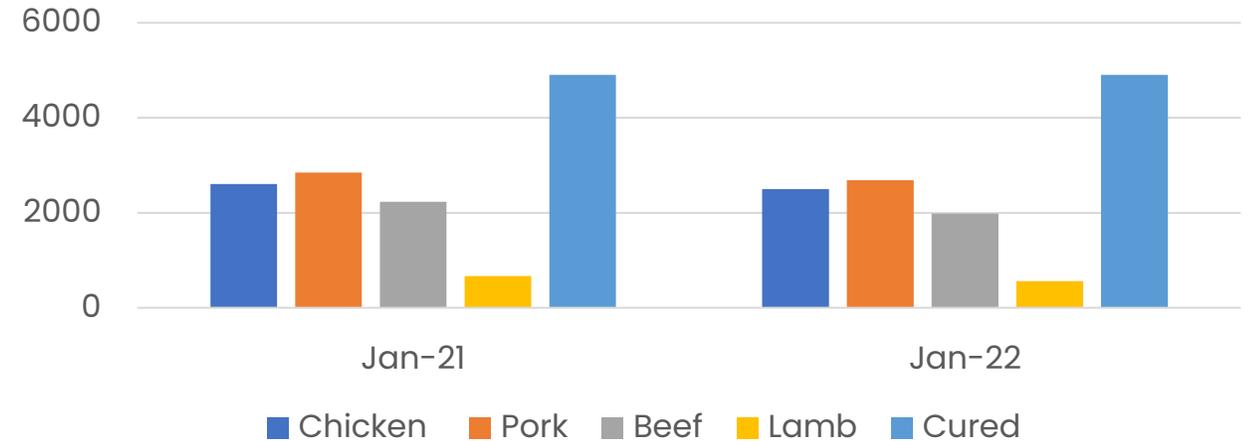
Sales of meat decreased by 12,4% in volume in 2022 compared to 2021 and by 6,7% in value

Meat consumption in 2022

Volume (million kg)



Value (million €)



Pro-capita home consumption in volume in Spain in 2022:

- -13.8% for poultry;
- -10% for pork;
- -18,1% for beef;
- -24,7% for lamb;
- -8.6% for cured meat.

Pro-capita home consumption in Spain in value in 2022:

- -4.1% for poultry;
- -5.7% for pork;
- -11,2% for beef;
- -15,8% for lamb;
- -4.9% for cured meat.