



TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

Meat Market Observatory
06 March 2018

Belgium

Period ending January 2018

Product category	Price evolution (% change total 2017 vs total 2016)	Price evolution (% change Jan 2018 vs Jan 2017)
Total pigmeat	2.4%	1.3%
Delicatessen (salami, ham, prosciutto, etc)	0.9%	2.6%
Processed pork (élaborés de viande)	1.8%	2.4%
Total beef and veal	1.0%	0.5%

Source: Comeos

France

Period ending 21 January 2018

Product category	volumes (% change year-to-date)	price (% change year-to-date)	volumes (% change Year-to-year) (52 weeks)	price (% change Year-to-year) (52 weeks)
Fresh meat	-6.3%	+2.2%	-1.9%	+1.3%
Fresh beef	-13.0%	+4.1%	-3.5%	+0.8%
Fresh veal	-13.4%	+1.9%	-4.5%	-0.3%
Fresh lamb	-3.6%	+0.2%	-5.0%	+1.0%
Fresh pork	-8.1%	-0.5%	-4.7%	+1.4%
Tripe Products	-10.0%	-0.4%	-5.5%	-0.1%
Poultry	-1.9%	+1.7%	-1.1%	+0.7%
Frozen Meat	-4.1%	+2.4%	-0.7%	+0.0%
Ham and other meats	-5.7%	+3.2%	-1.1%	+2.6%

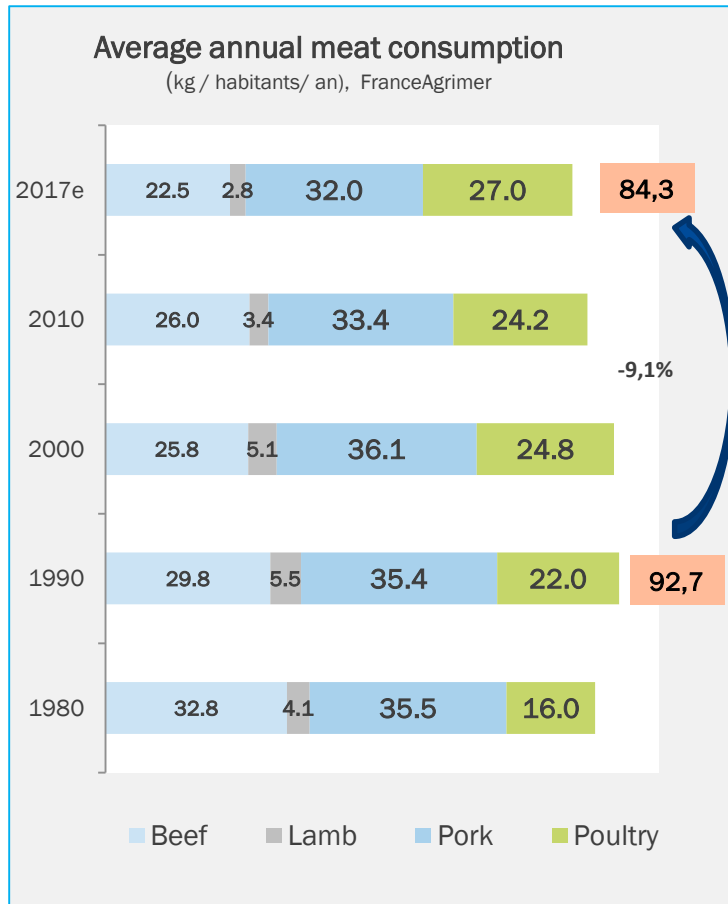
Source: Kantar Worldpanel

France

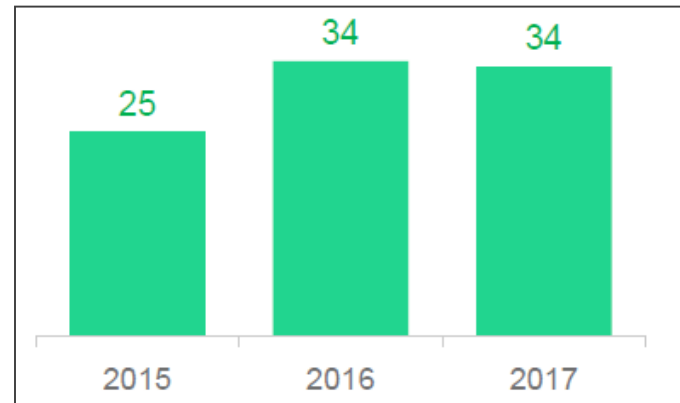
Period ending 21 January 2018: trends and landscape

- Meat consumption is still decreasing, for all meat types
- 34% of households with at least one person are neither vegetarian nor vegan, but tends to reduce or limit consumption of animal protein (25% in 2015)
- Prices are quite stable (except ham & other meats => end prices have increased by 2.6% (52 weeks, period ending 21 January 2018))
- The Paris International Agricultural Convention will take place from February 24th to 4th March
- French cattle farmers strongly oppose Mercosur talks

France

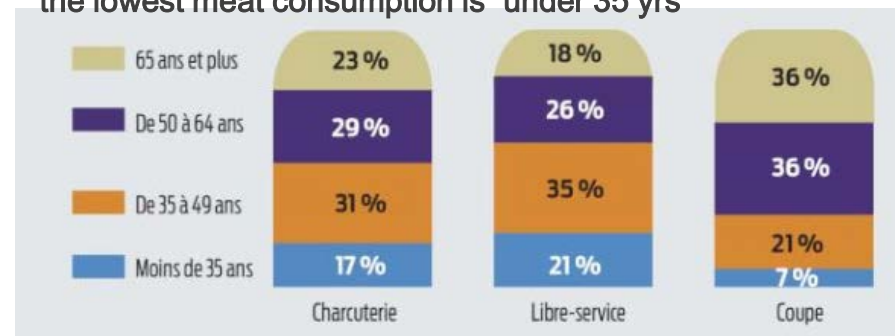


Survey: « % of households with at least one person "neither vegetarian nor vegan, but who tends to reduce or limit its consumption of animal protein »



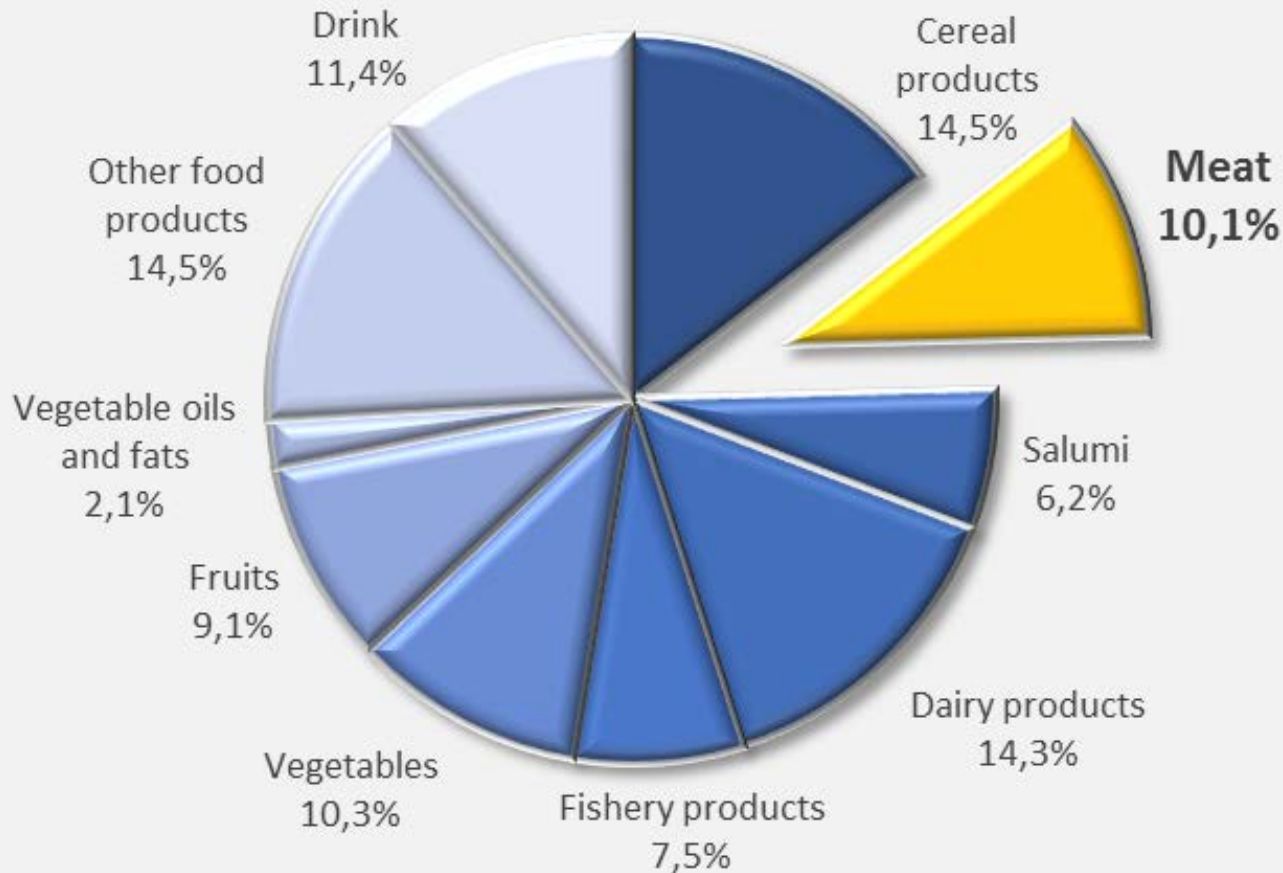
Source: Kantar Worldpanel

Difficult generational renewal on the cured meats market: the lowest meat consumption is under 35 yrs



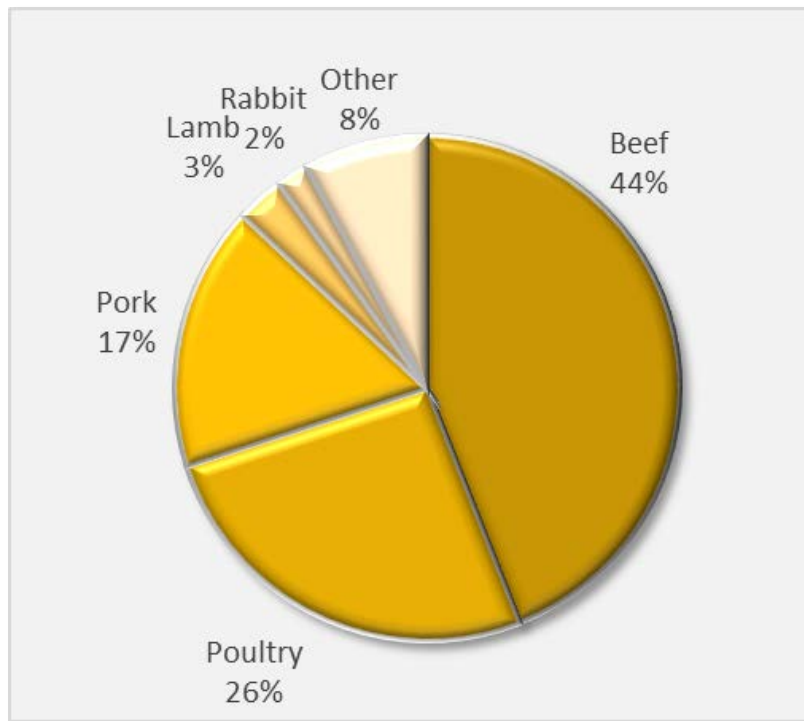
Source: Kantar Worldpanel / hyper-supermarkets / 2017

Italy: Agri-foodstuffs consumption breakdown (Value), 2017

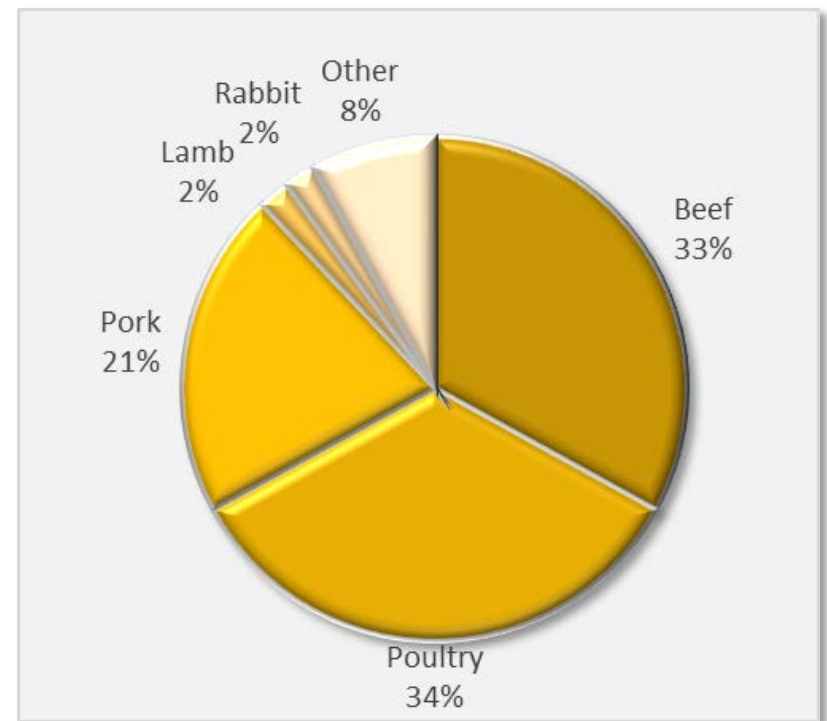


Italy: Household Purchases of meat breakdown, 2017

VALUES

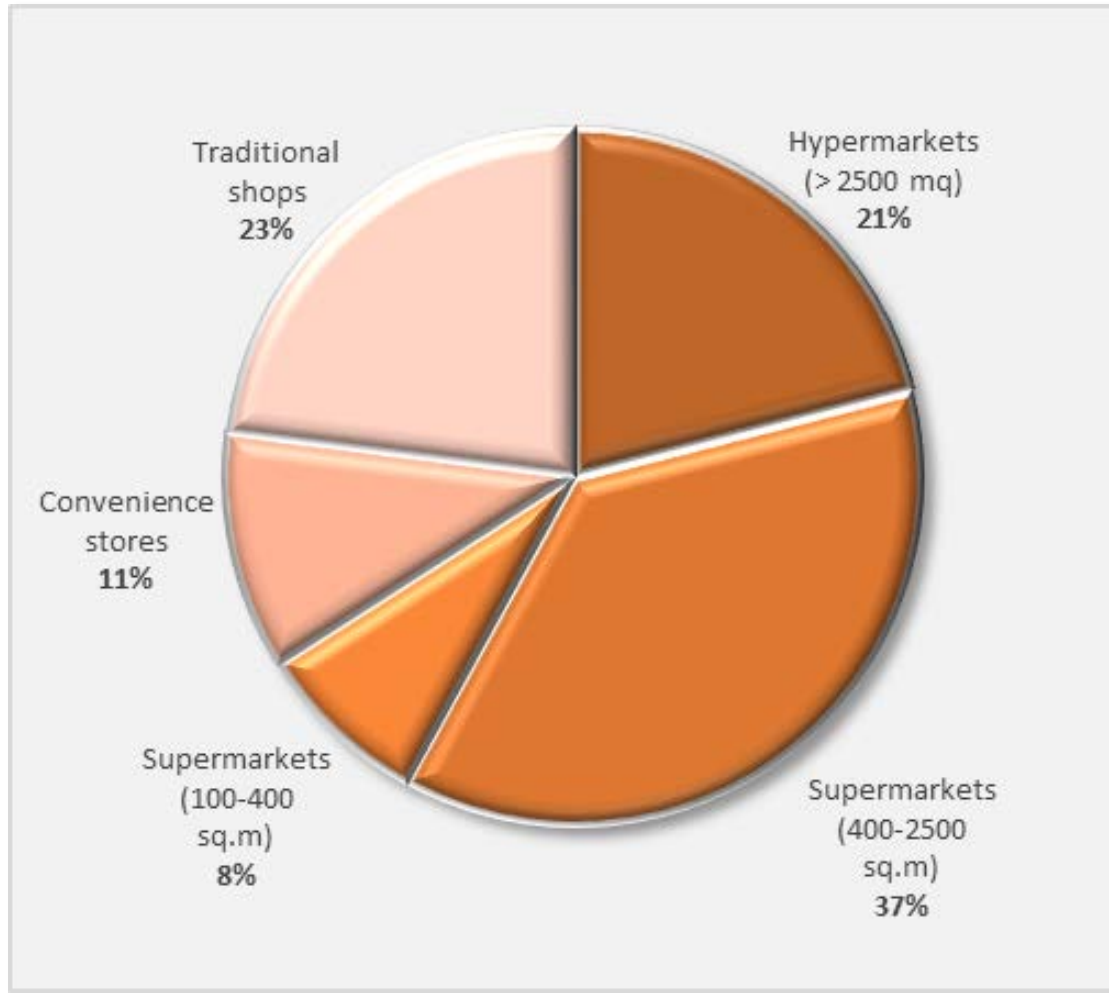


VOLUMES



Italy: Household Purchases of meat, 2017

VALUE - BREAKDOWN BY RETAIL FORMAT, %

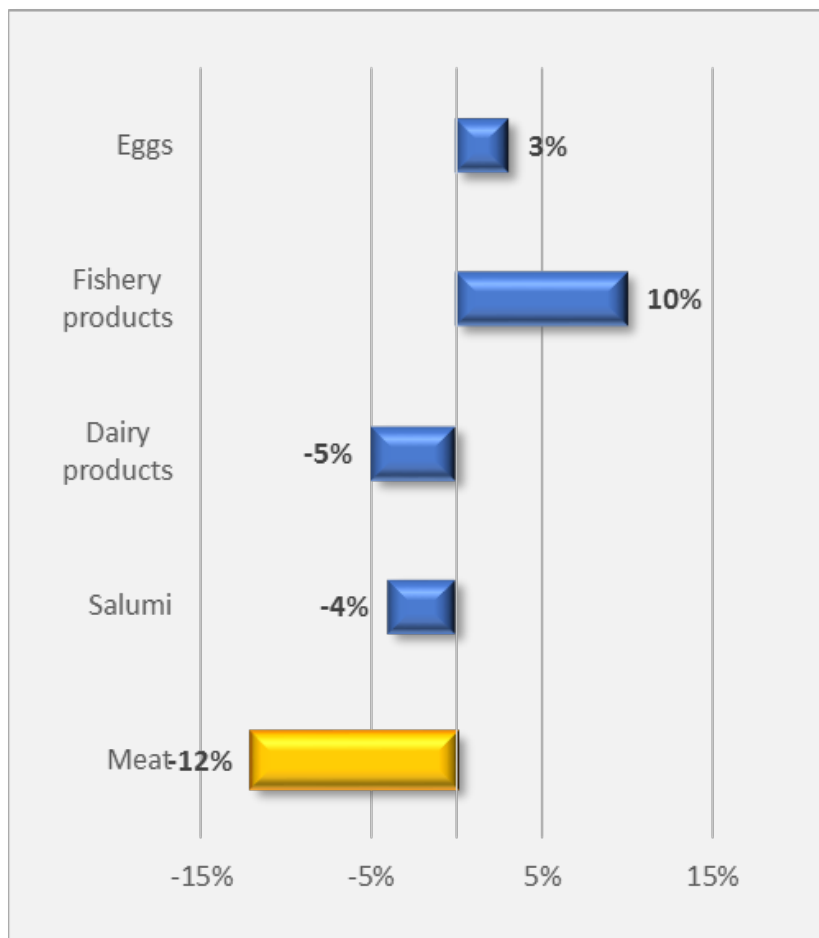


66% of meat purchases are made via supermarkets and hypermarkets, 23% via traditional shops

Italy: Household Purchases of food products

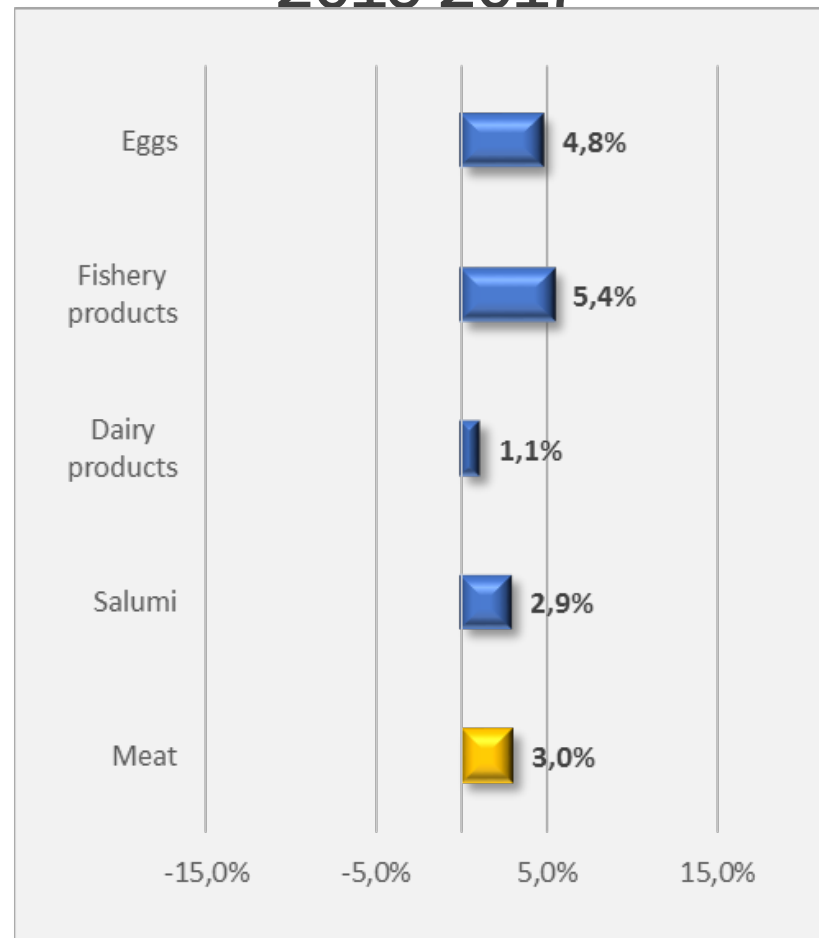
VOLUMES, % CHANGE

2012-2016



VOLUMES, % CHANGE

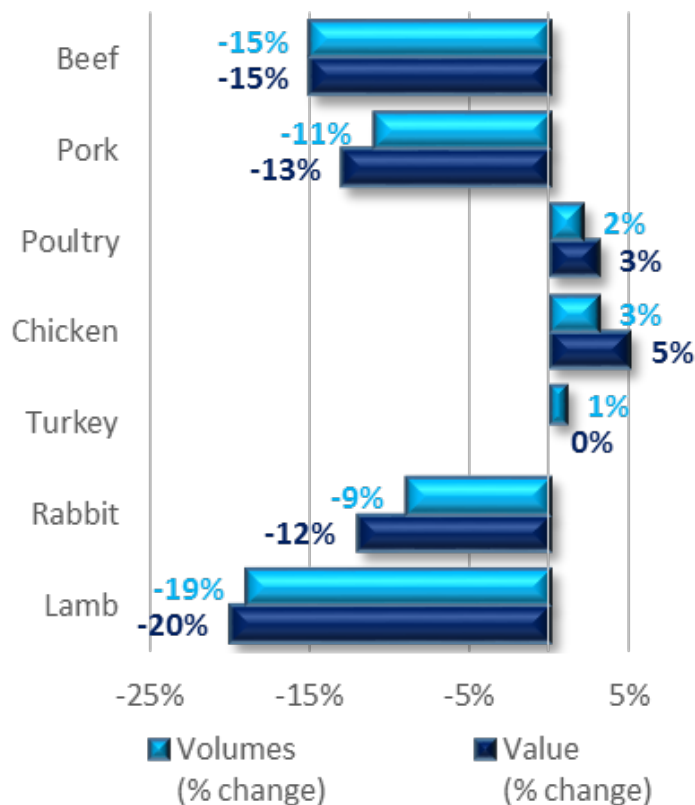
2016-2017



Italy: Household Purchases of meat

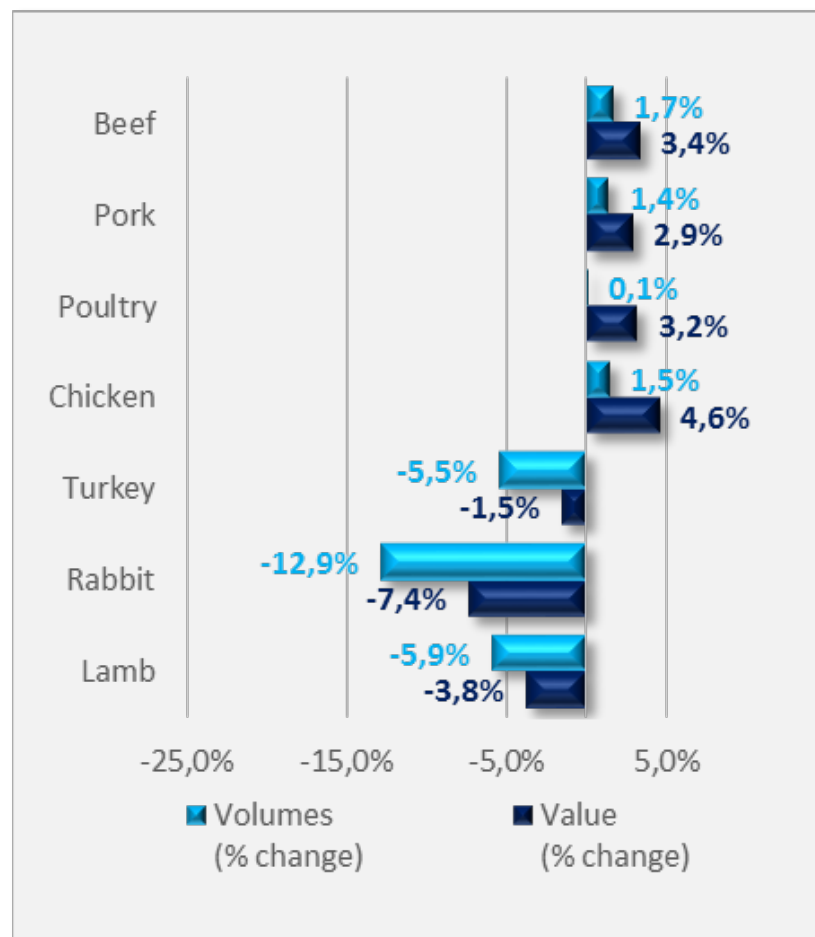
VALUE

(% CHANGE 2012-2016)



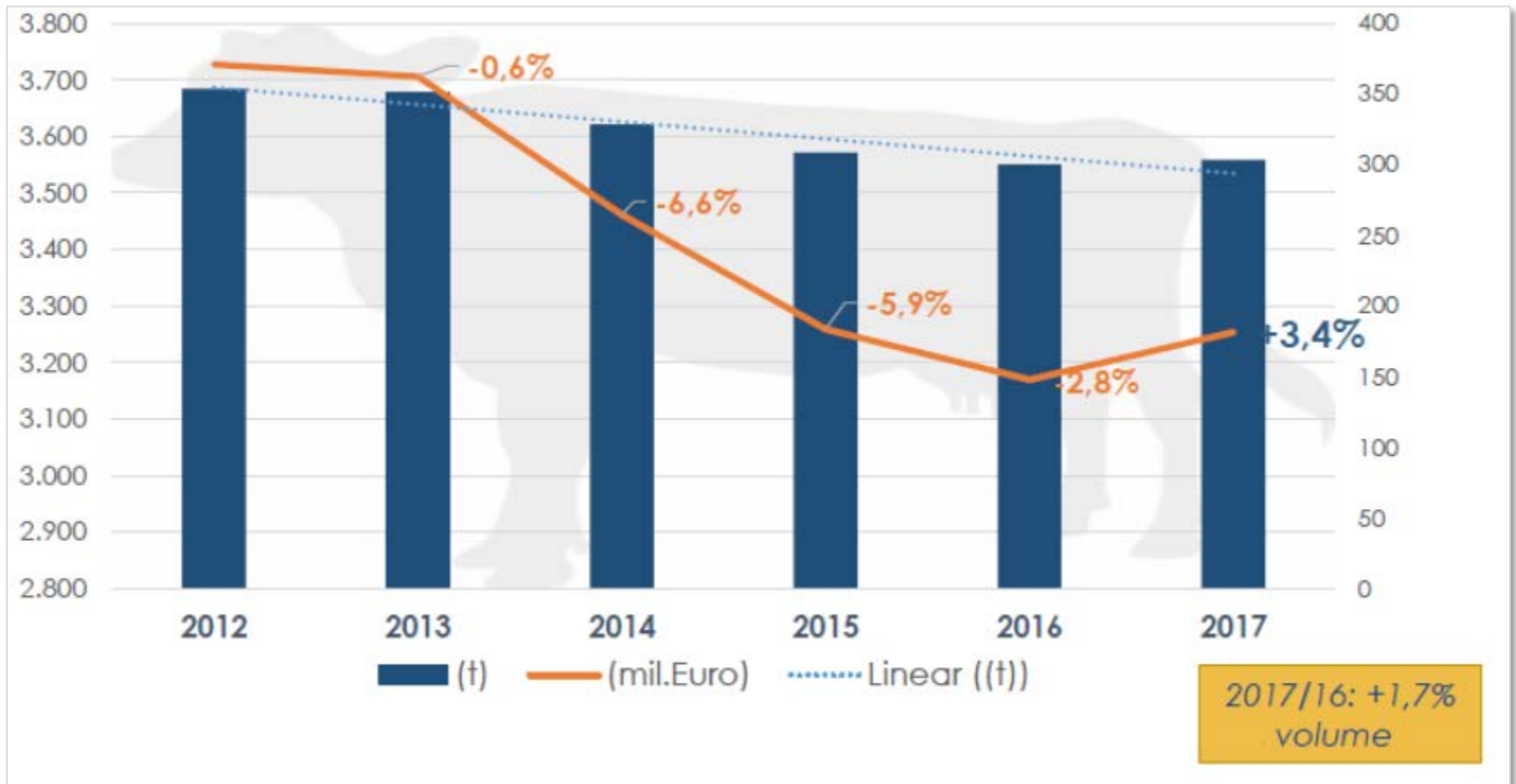
VALUE

(% CHANGE 2016-2017)



Italy: Household Purchases of meat

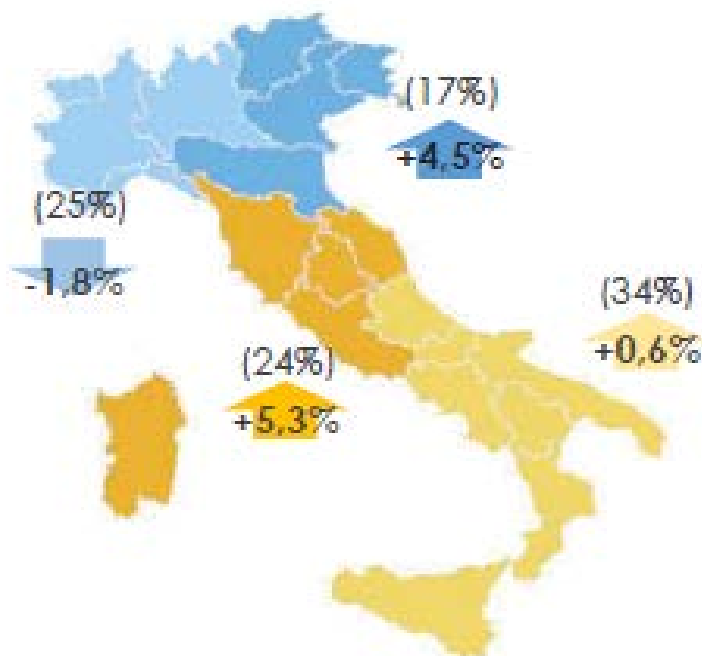
FRESH BEEF



Italy: Household Purchases of meat

FRESH BEEF

VOLUMES
(% CHANGE 2016-2017)
NATIONAL AVERAGE: +1.7%



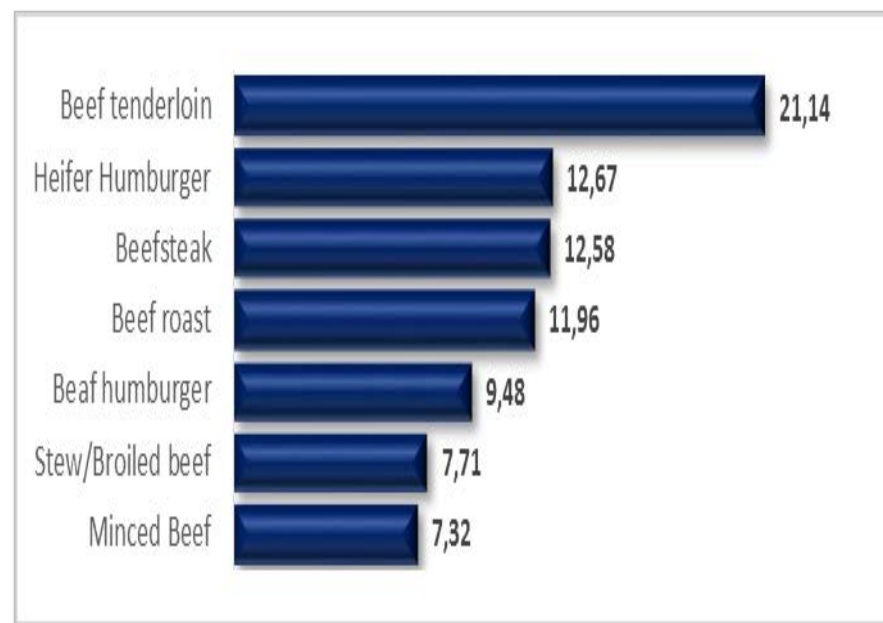
Beef consumption in 2017 increased more than the national average in the Center (5.3%) and the North-East (4.5%), increased moderately in the South (0.6%) and decreased in the North-West (-1.8%)

Italy: Household Purchases of meat

FRESH BEEF

Kind	% change		Share %
	2012-17	2016-17	
Veal stew	-20%	2%	5%
Minced Veal	-21%	1%	8%
Veal roast	-19%	-1%	6%
Stew/Broiled beef	-18%	-3%	10%
Minced Beef	-5%	-1%	19%
Beef tenderloin	-15%	6%	2%
Beefsteak	-17%	-1%	17%
Beaf roast	-17%	0%	4%
Beaf hamburger	-1%	0%	6%
Heifer Hamburger	90%	35%	3%
Other			21%

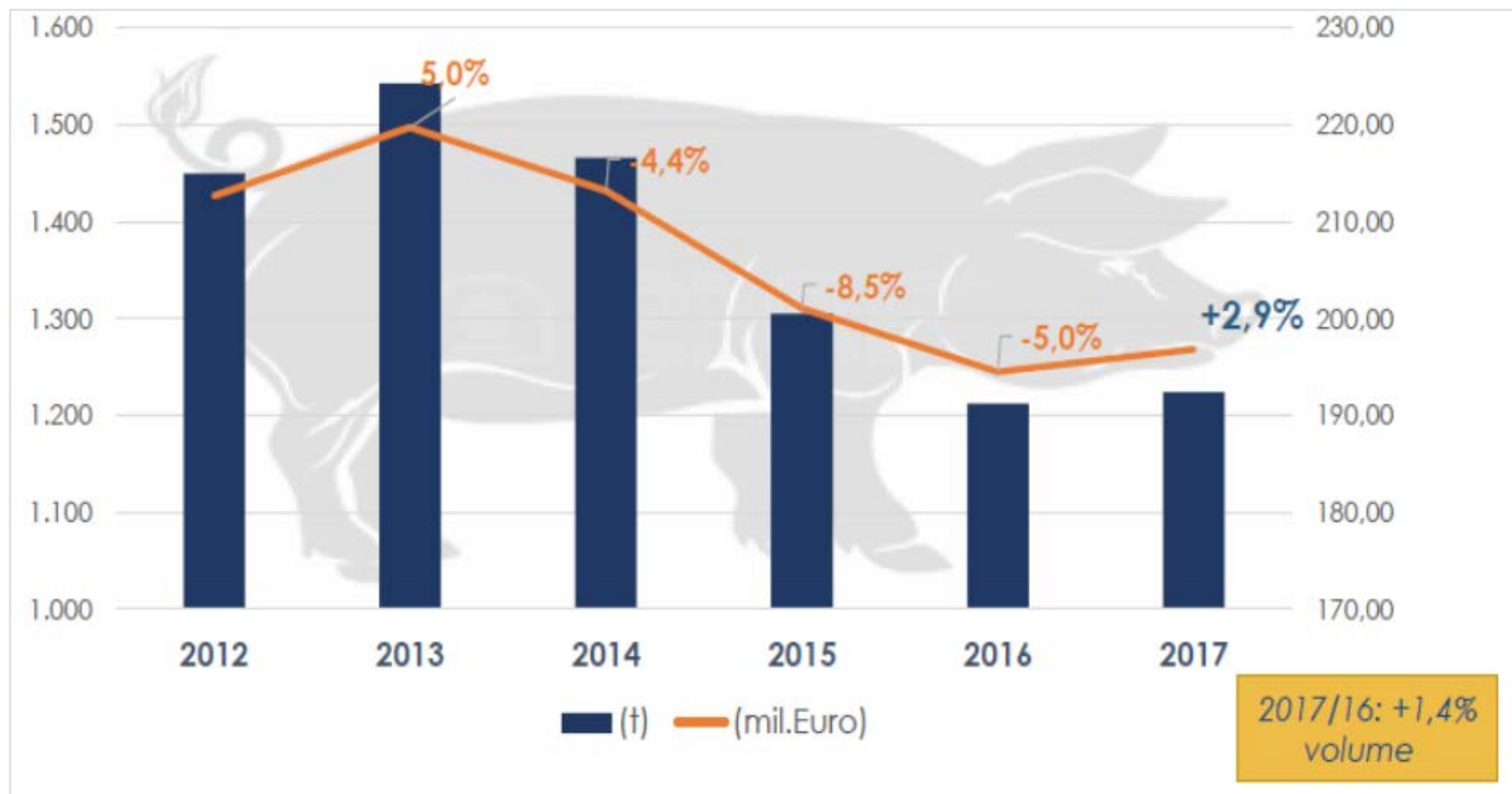
AVERAGE RETAIL PRICE 2017 (€/KG)



Source: Ismea estimates based on Nielsen data

Italy: Household Purchases of meat

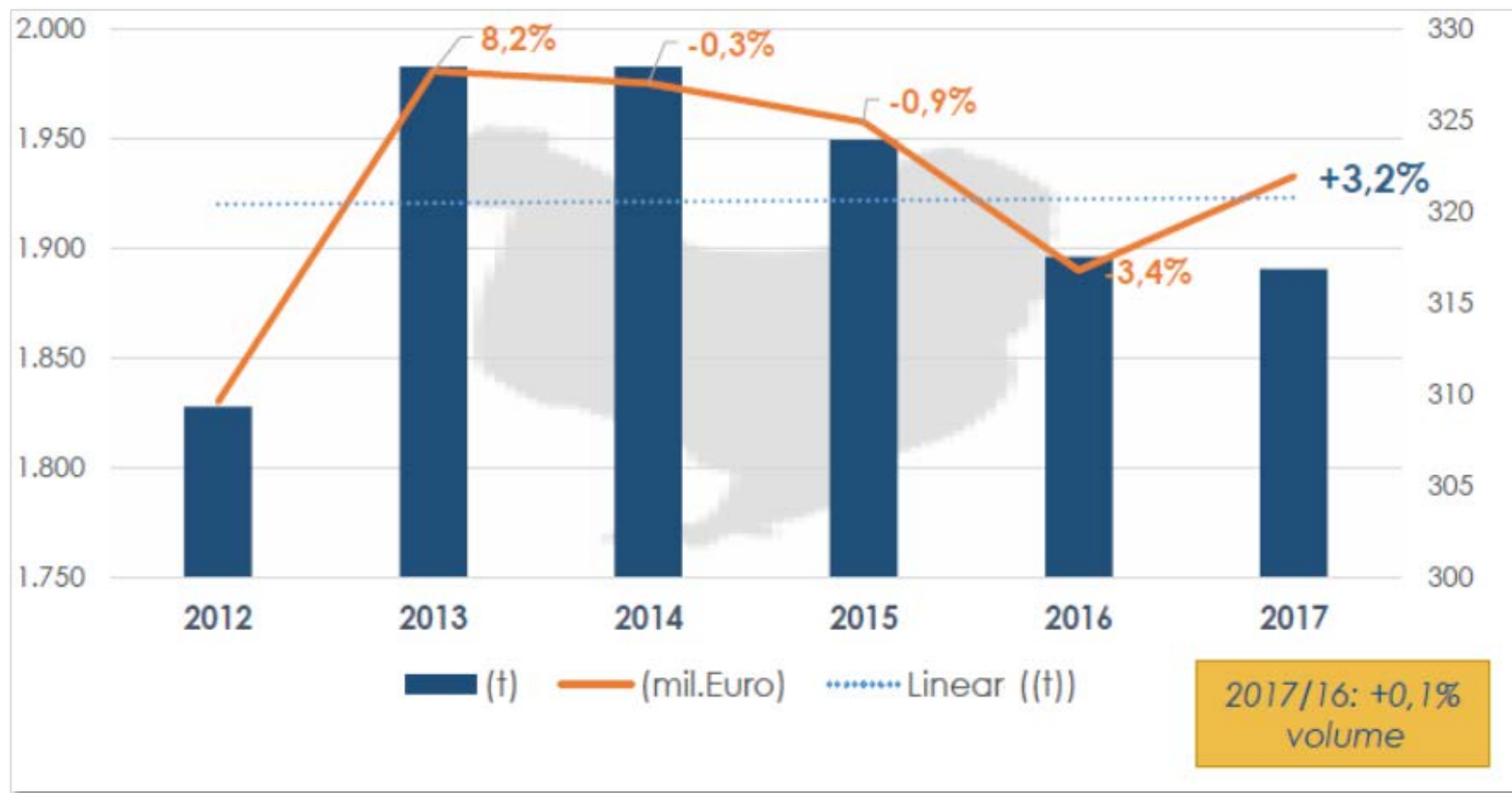
FRESH PORK



Source: Ismea estimates based on Nielsen data

Italy: Household Purchases of meat

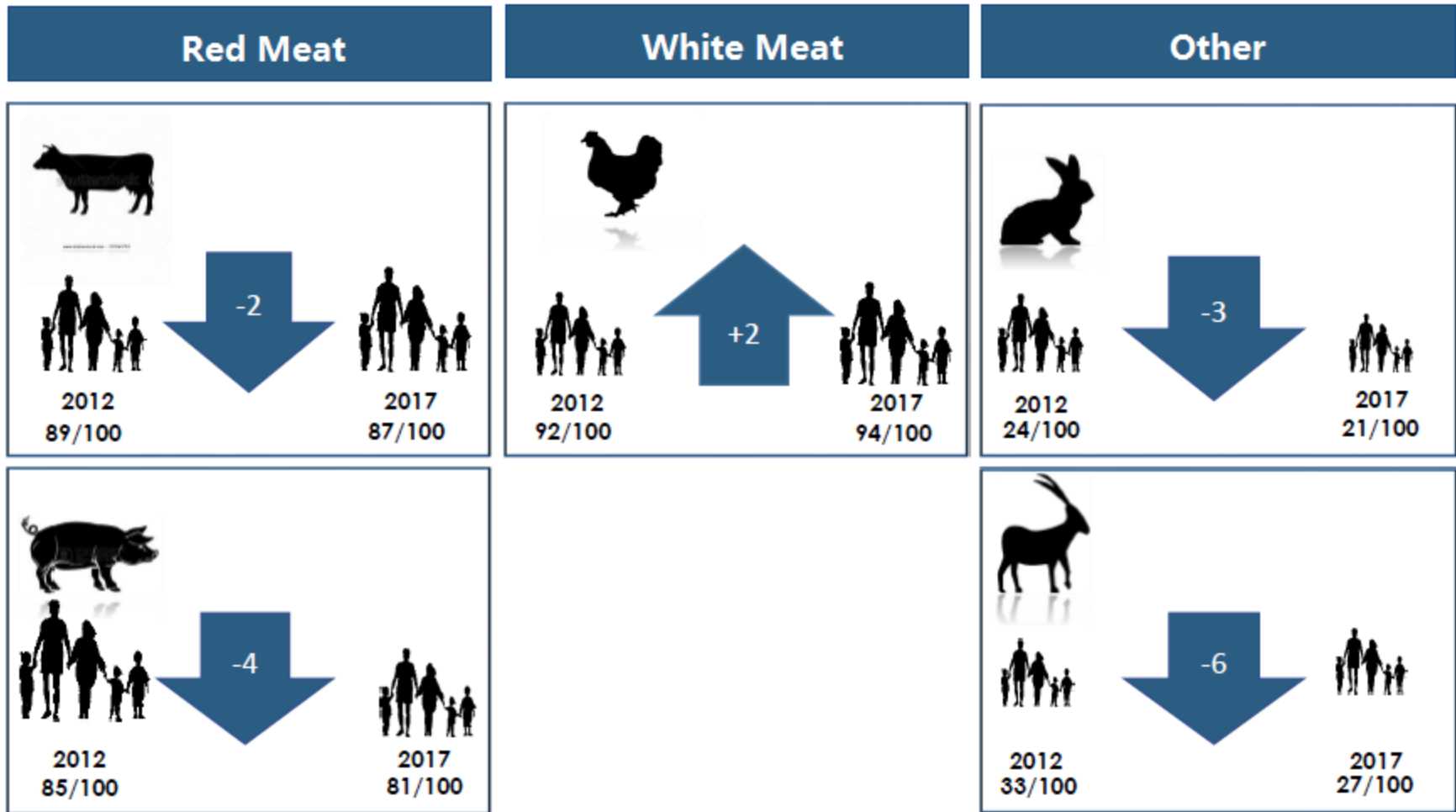
FRESH POULTRY



Source: Ismea estimates based on Nielsen data

Italy: Household Purchases of meat

% of purchasing families out of the target universe



Source: Ismea estimates based on Nielsen data

Spain

Product category	Volumes (% change Jan.-Nov. 17 vs Jan.-Nov 16)	Volumes (% change November 2017 vs. November 2016)	Value (% change Jan.-Nov. 17 vs Jan.-Nov 16)	Value (% change November 2017 vs. November 2016)
Total meat	-1.1%	-0.4%	+1.5%	+2.8%
Pork	- 1.1%		+1.8%	
Beef	-3.5%		-0.8%	
Frozen	+3.4%		+2.5%	
Processed meat	+1.5%		+3.1%	

Source: <http://www.mapama.gob.es/es/alimentacion/temas/consumo-y-comercializacion-y-distribucion-alimentaria/panel-de-consumo-alimentario/ultimos-datos/>

United Kingdom: beef

Period ending 31st December 2017

	one month 4 weeks ended:	3 months 12 weeks ended:	1 year 52 weeks ended:
Fresh & Frozen Beef	31st December 2017	31st December 2017	31st December 2017
Expenditure (£ million)	199.6	565.7	2,229.8
annual change %	+5.8	+2.3	+2.7
Volume (tonnes)	24,931	71,485	284,135
annual change %	+3.3	-1.1	+0.7
Average price (£/kg)	8.01	7.91	7.85
Penetration (%)	55.8	73.9	85.5
Annual volume change %	4 weeks ended:	12 weeks ended:	52 weeks ended:
	31st December 2017	31st December 2017	31st December 2017
Fresh & frozen beef	+3.3	-1.1	+0.7
- Roasting	-4.8	-14.7	-7.3
- Stewing	+7.3	-9.6	+0.4
- Frying/grilling steak	+3.5	+9.1	+4.5
- Mince	+7.8	+3.9	+1.6
- Marinade	+30.1	+30.8	+17.1
Burgers and grills	+1.4	+2.7	+0.1
Chilled ready meals	+1.4	-0.8	+3.3
Frozen ready meals	+13.5	+7.0	+4.0
Fresh pre-packed hot pies	-0.1	-2.7	+3.1
Fresh pre-packed pasties	+9.1	+5.3	+6.4
Frozen pies/puddings	+5.7	+5.6	+6.7

United Kingdom: pigmeat

Period ending	31st December 2017	one month	3 months	1 year
		4 weeks ended:	12 weeks ended:	52 weeks ended:
		31st December 2017	31st December 2017	31st December 2017
Fresh & Frozen Pork				
Expenditure (£ million)		57.2	175.3	754.1
annual change %		+3.6	+5.8	+3.8
Volume (tonnes)		11,856	36,874	161,768
annual change %		+1.8	+1.0	-0.9
Average price (£/kg)		4.82	4.75	4.66
Penetration (%)		29.0	49.1	70.0
Annual volume change %		4 weeks ended:	12 weeks ended:	52 weeks ended:
		31st December 2017	31st December 2017	31st December 2017
Fresh & frozen pork		+1.8	+1.0	-0.9
- Belly		+7.5	-9.5	-1.4
- Chops/Steaks		-0.5	+1.7	-0.2
- Leg Roasting Joint		+23.3	+22.8	+5.6
- Loin Roasting		-22.1	-16.3	-7.0
- Shoulder Roasting Joint		-13.6	-10.6	-15.7
- Marinades		-0.9	-8.9	-3.1
- Pork Ribs		+12.7	+13.3	+6.2
- Mince		+22.5	+18.0	+24.9
Bacon		+2.0	+2.2	+2.2
Pork Sausages		+6.0	+2.0	+0.6
Fresh PP Pork Pies		-3.2	+0.2	+0.8
Fresh PP Sausage Rolls		-6.0	-9.6	-5.1
Pork Sliced Cooked Meats (incl Ham)		+1.6	+1.7	+2.4
Ready Meals (chilled)		+0.9	+6.9	+4.3