



An overview of consumption trends

Unit of Analysis and Outlook

25 May, European Pigmeat Reflection Group

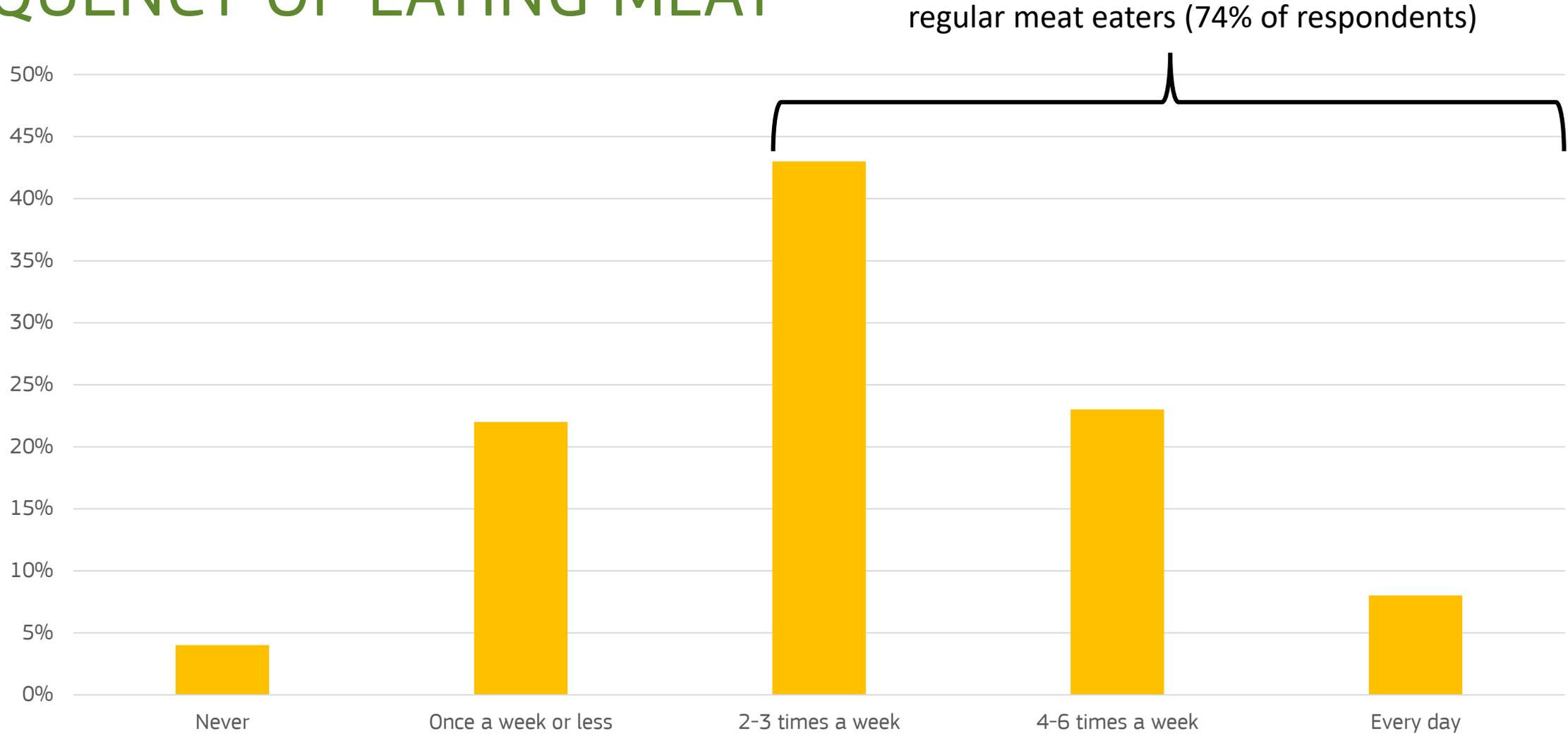
CONTENT

- Historic and recent EU meat consumption trends
- Medium-term outlook for EU meat consumption
- Elements of changing meat consumption

...general and with a focus on pigmeat

FREQUENCY OF EATING MEAT

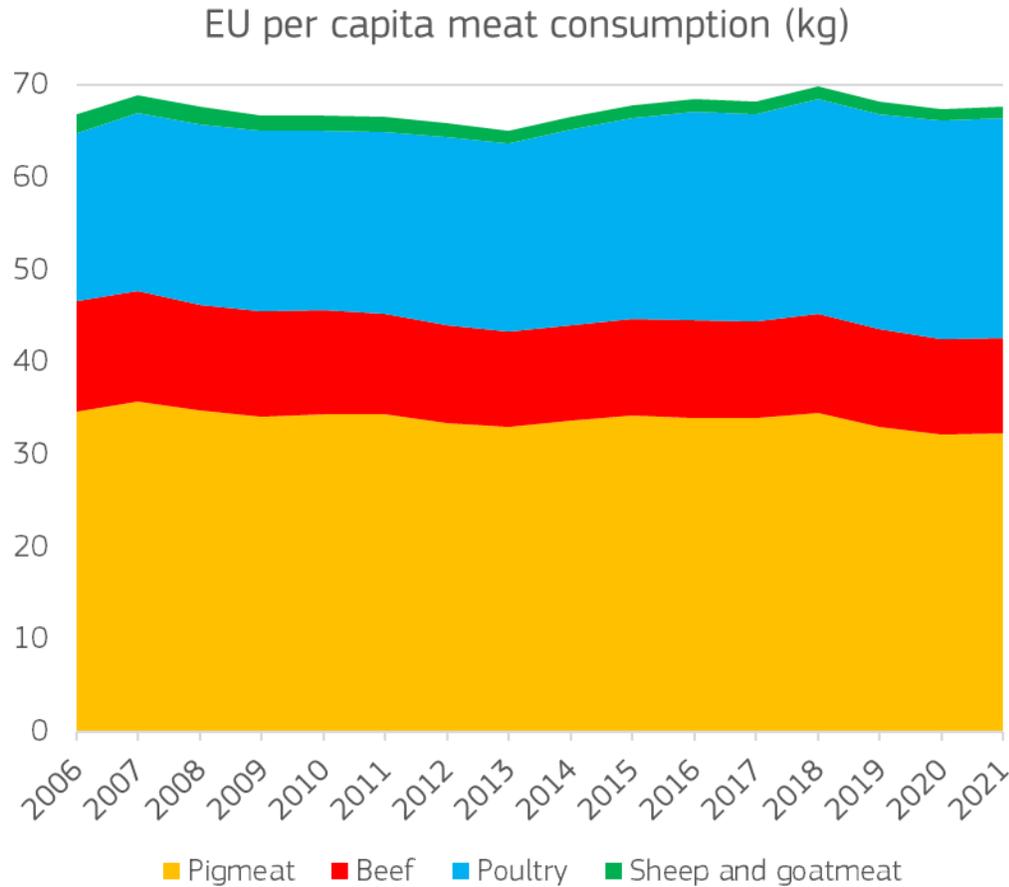
MEAT EATING HABITS



*Note: The survey was done at the time when the UK was the part of the EU.
Source: DG Agriculture and Rural Development, based on ING International Survey 2017.*

HISTORIC AND RECENT EU MEAT CONSUMPTION LEVELS

MEAT CONSUMPTION PER TYPES



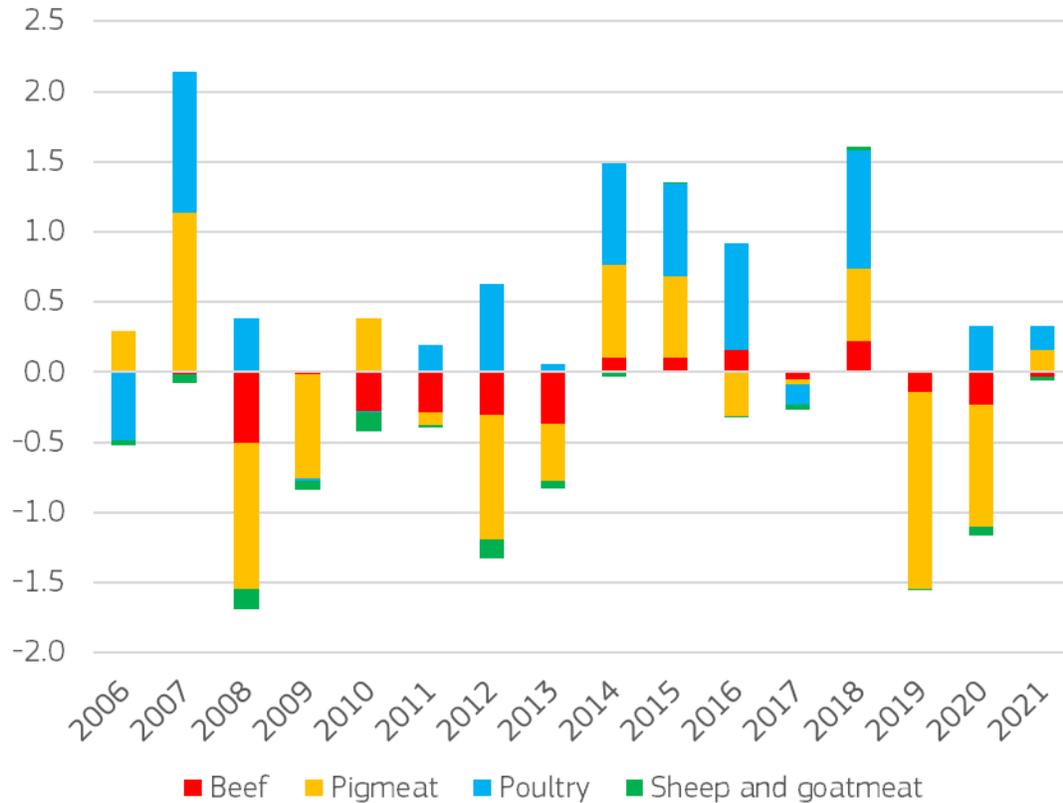
Source: DG Agriculture and Rural Development.

- In 2021, estimated pigmeat per capita consumption volumes ranged from **less than 35 kg** in FI, FR, IT, SE, SI to **more than 50 kg** in PL, HU, ES (EU average is 33 kg)
- In the majority of MS, pigmeat covers **more than 50% of per capita meat consumption** (EU average is 48%)

EU MEAT CONSUMPTION DYNAMICS

VOLATILITY IN ANNUAL CONSUMPTION PATTERNS

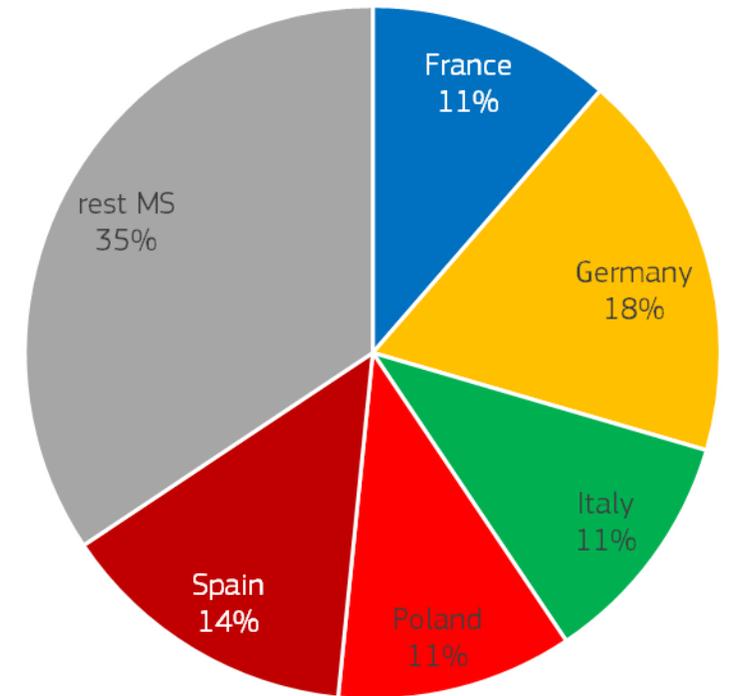
Annual change in EU per capita meat consumption per types of meat (kg)



Source: DG Agriculture and Rural Development.

CONCENTRATION OF PIGMEAT CONSUMPTION

Share of Member States on the EU pigmeat consumption in 2021



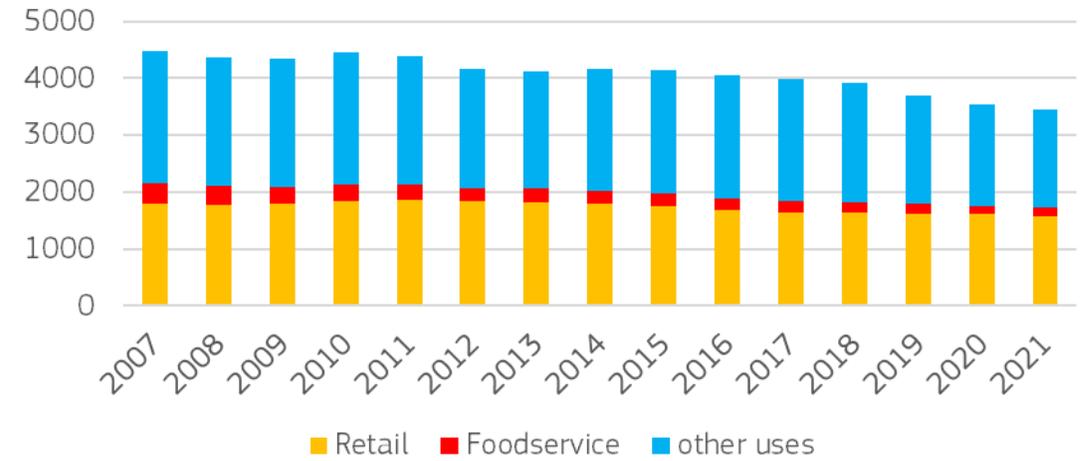
Source: DG Agriculture and Rural Development.

ZOOMING INTO PIGMEAT USE CHANNELS IN SELECTED MS

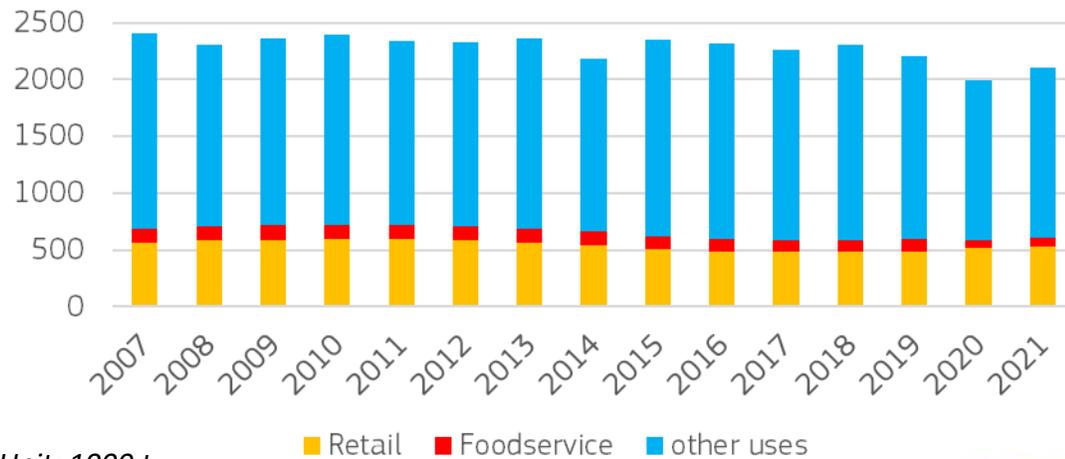
France



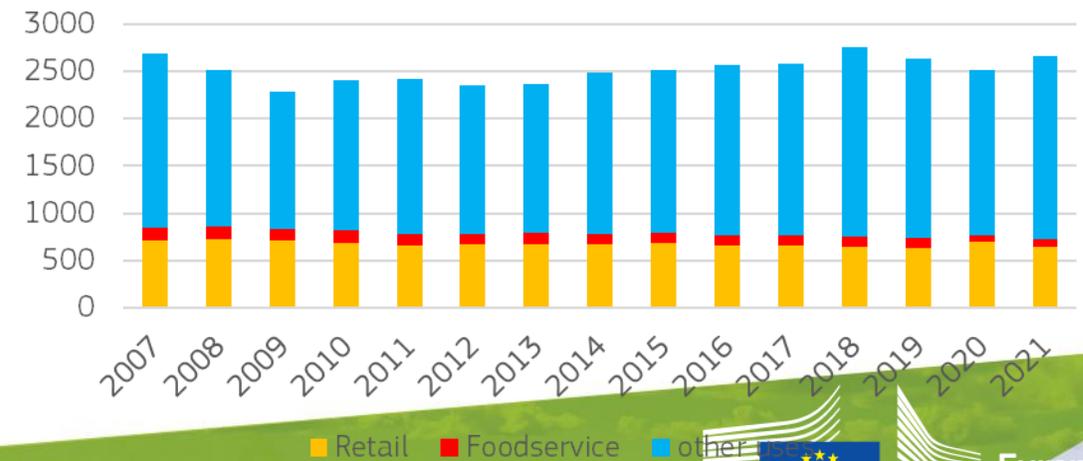
Germany



Italy



Spain



Unit: 1000 t

Note: other uses represent industrial processing and other uses

Source: DG Agriculture and Rural Development, based on EU short-term outlook and Euromonitor.



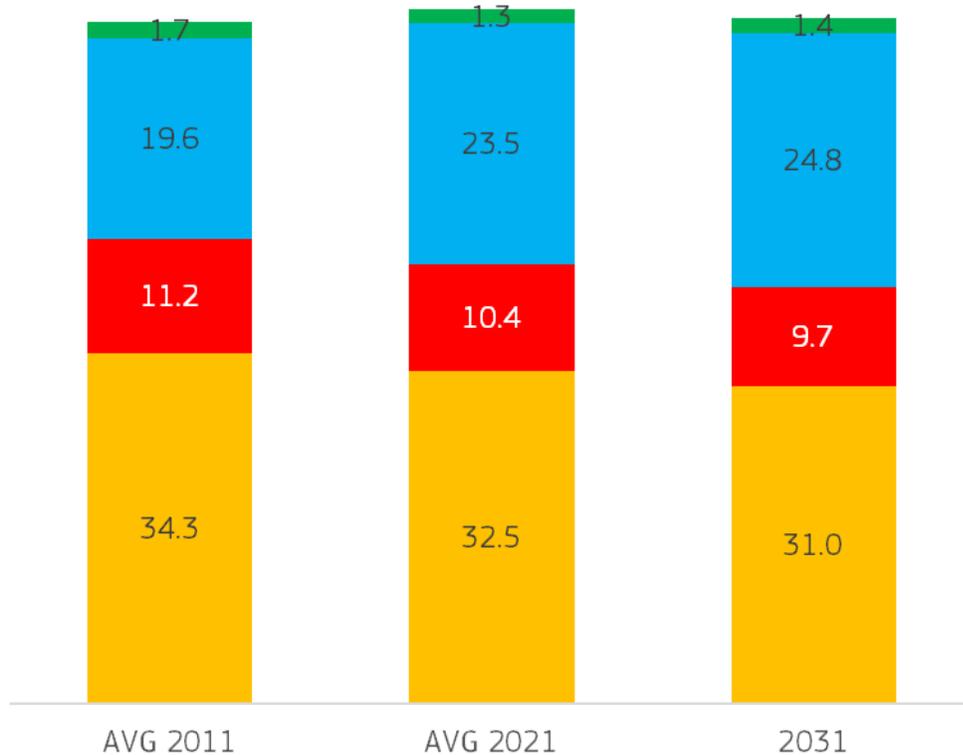
European Commission

OUTLOOK FOR EU MEAT CONSUMPTION

MEAT CONSUMPTION IN NEXT 10 YEARS

EU per capita meat consumption

■ Pigmeat ■ Beef ■ Poultry ■ Sheep and goatmeat



Note: AVG refers to averages of 2009-2011 and 2019-2021 respectively.
Source: DG Agriculture and Rural Development.

GENERAL TRENDS:

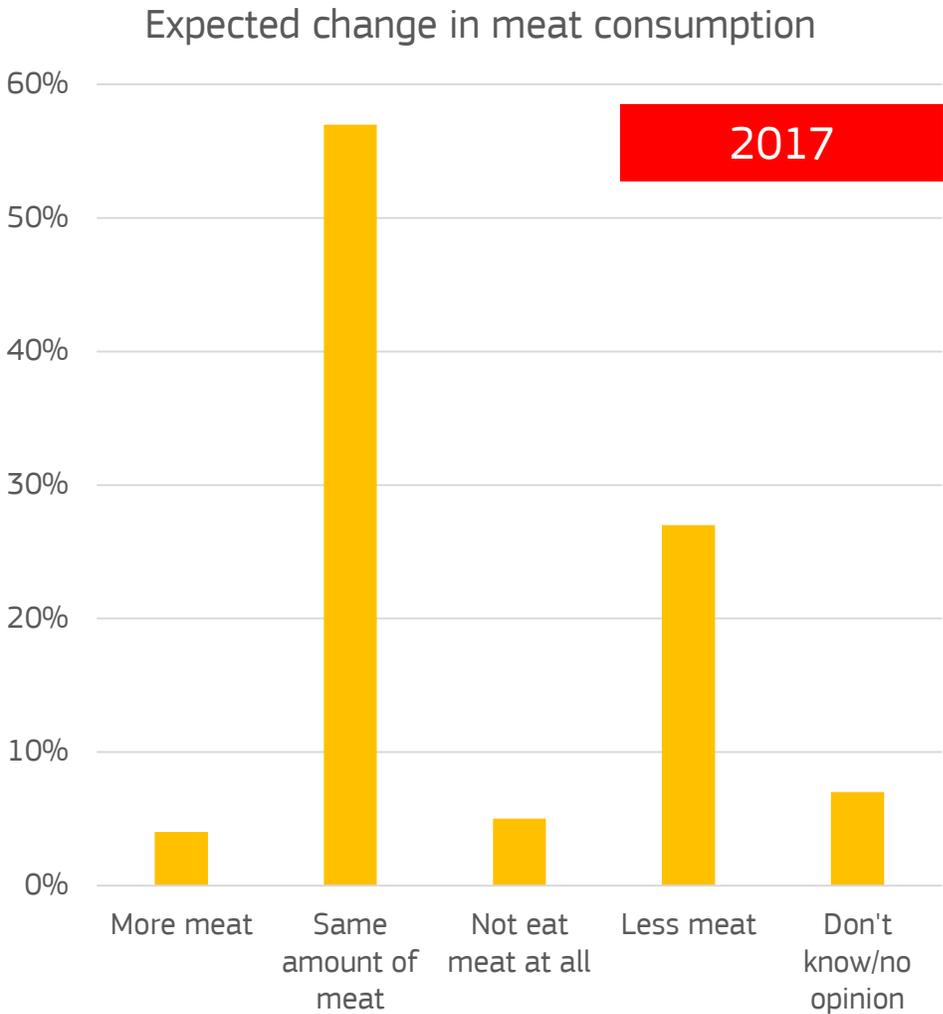
- Both consumption and production focus on sustainability
- More consumers' attention on production processes, and products' origin -> local markets, organic products, quality schemes, animal welfare, environmental footprint
- Health and convenience trends (from fresh to processed)

PIGMEAT:

- Expected ongoing shift to poultry (perceived more healthy and easier to prepare)

EXPECTED CHANGE IN MEAT CONSUMPTION

CHANGE IN VOLUME?



SOME INSIGHTS INTO MS

Please note that results are independent and graphs are not to be related due to different sources and methodologies.

2020

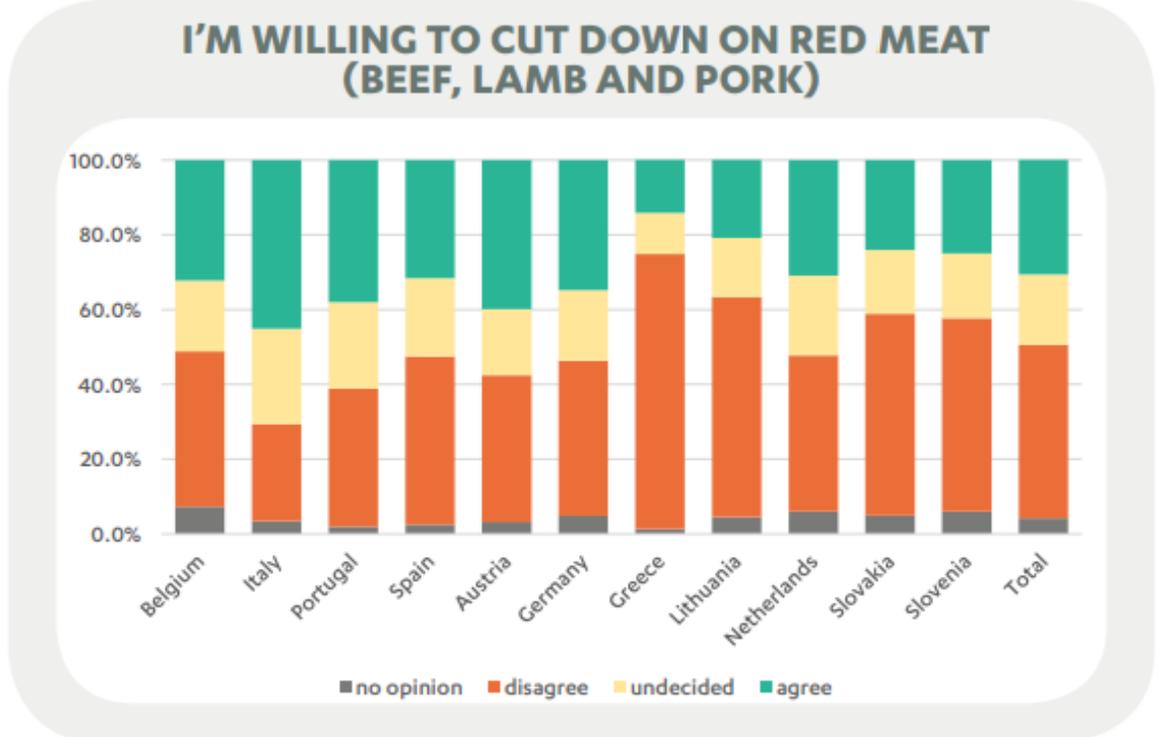


Figure 13: Q6 – Level of agreement with the statement: "I'm willing to cut down on red meat (beef, lamb and pork)" [Base: all respondents]

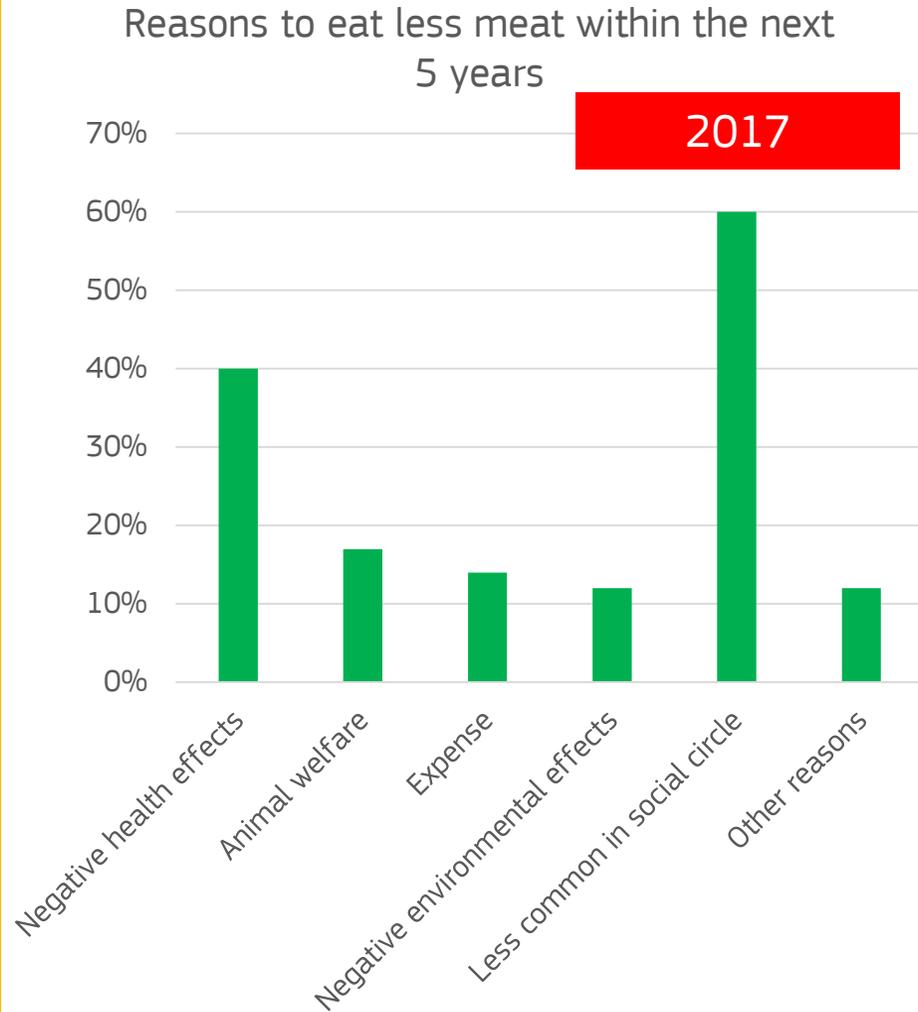
Note: The survey was done at the time when the UK was the part of the EU.
 Source: DG Agriculture and Rural Development, based on ING International Survey 2017.

Source: BEUC (2020).



DRIVERS FOR CHANGING EU MEAT CONSUMPTION

GENERAL REASONS



FOCUS ON MS AND ENVIRONMENTAL REASONS

Please note that results are independent and graphs are not to be related due to different sources and methodologies.

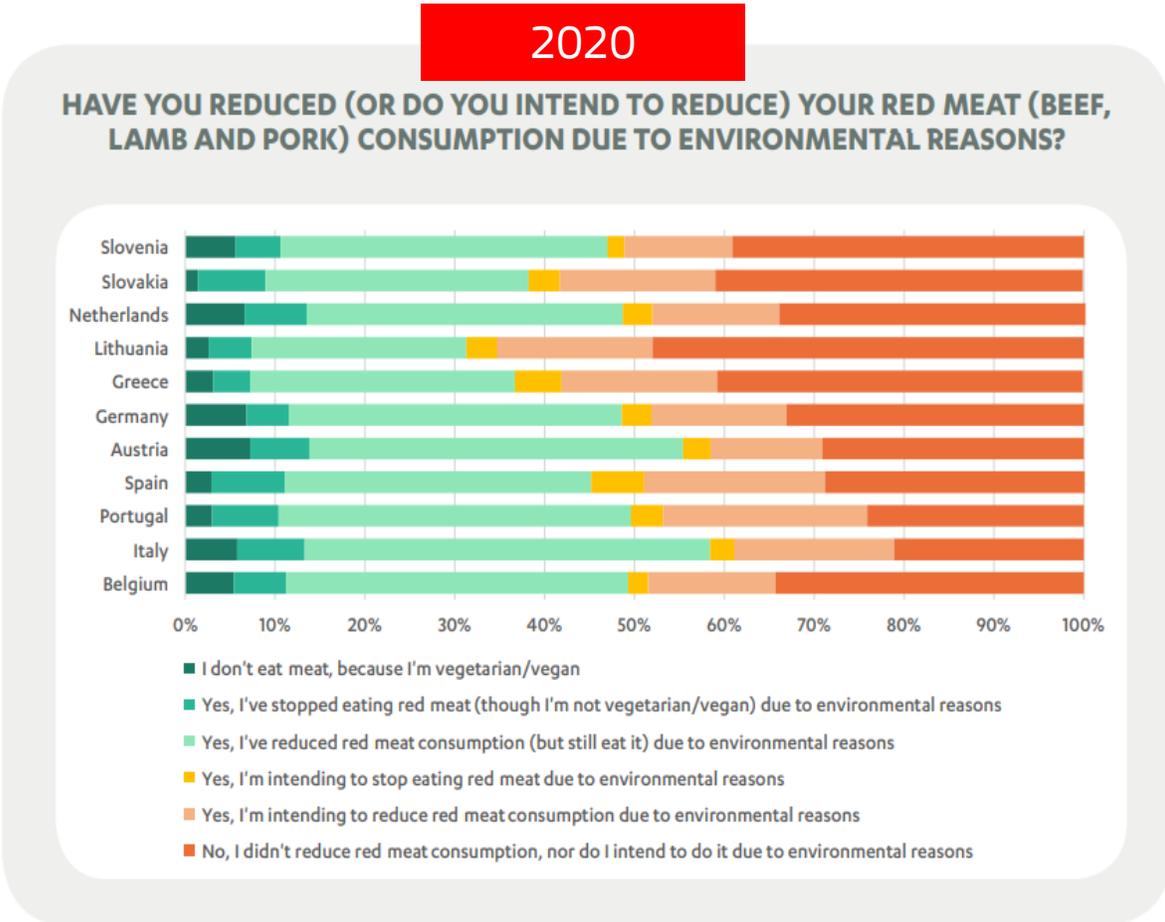


Figure 16: Q7 – "Have you reduced (or do you intend to reduce) your red meat (beef, lamb, and pork) consumption due to environmental reasons?" [Base: all respondents]

Note: The survey was done at the time when the UK was the part of the EU.
Source: DG Agriculture and Rural Development, based on ING International Survey 2017.

Source: BEUC (2020).

THANK YOU FOR YOUR ATTENTION