



# TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

**Meat Market Observatory**  
**14 June 2019**

# Belgium

Period ending May 2019

Product category	Price evolution (% change May-19 vs May-18)	Price evolution (% change Jan-May 2019 vs Jan-May 2018)
Total pigmeat	2.6%	0.7%
Delicatessen (salami, ham, prosciutto, etc)	0,1%	0.2%
Processed pork (élaborés de viande)	2.4%	1.7%
Total beef and veal	0.8%	0.2%

# France

Period ending 31 March 2019

Product category	volumes (% change Year-to-year) (52 weeks)	price (% change Year-to-year) (52 weeks)
Fresh meat	-4,9	-0,1
Fresh beef	-6,3	1,1
Fresh veal	-9,3	0,3
Fresh lamb	-23,2	4,0
Fresh pork	-2,8	-1,1
Tripe Products	-4,5	-1,1
Poultry	-4,0	1,2
Frozen Meat	-7,2	0,9
Ham and other meats	-4,0	1,4

# France

## The meat market in 2018 (Kantar)

Consumers are buying less and less meat in its raw form for home consumption

### Total Produits Carnés



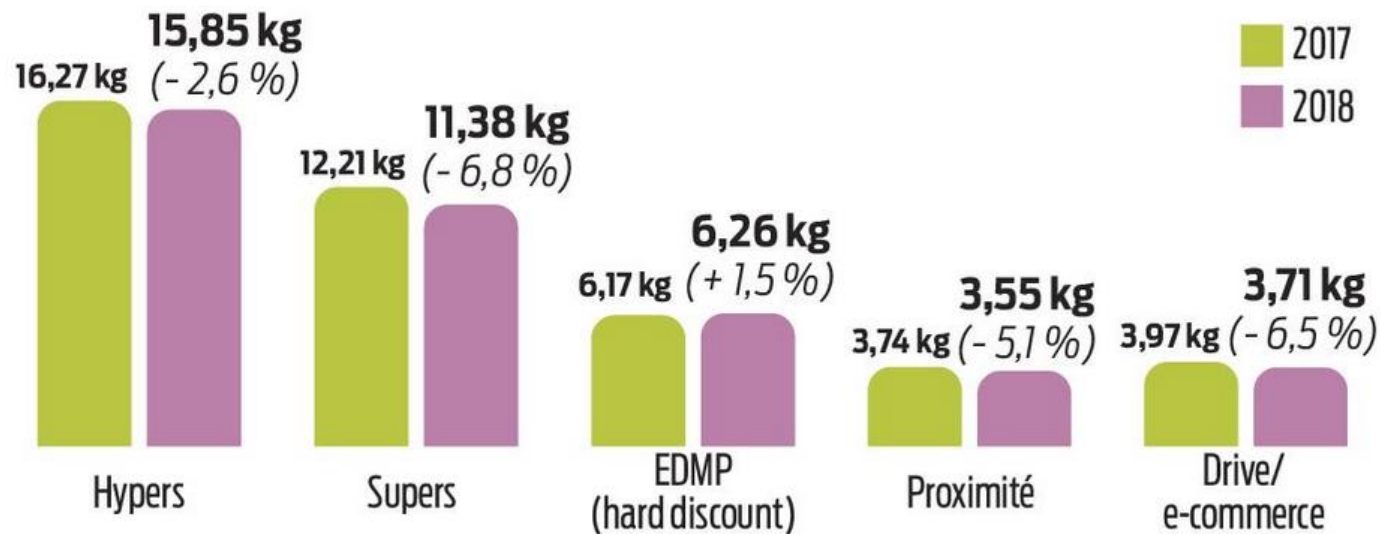
Source : Kantar Worldpanel

# France

## The meat market in 2018 (Kantar)

An almost generalised decrease in the quantities purchased

### Circuits : baisse quasi générale des quantités achetées



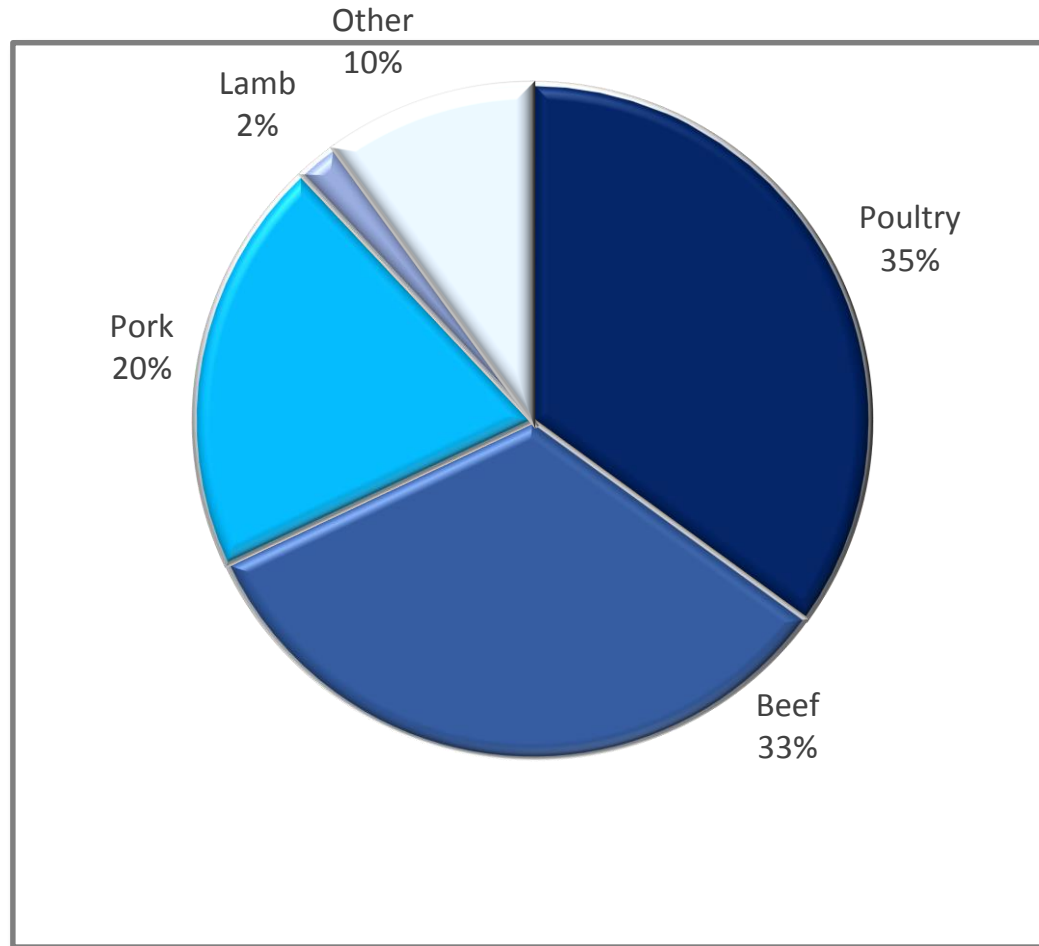
Source : Kantar. Quantités achetées par ménage acheteur en viandes de boucherie pour leur consommation/préparation à domicile.

Source : Kantar Worldpanel via LInéaires

# Italy: Household Purchases of meat

Period ending: December 2018

## VOLUMES – YEAR 2018

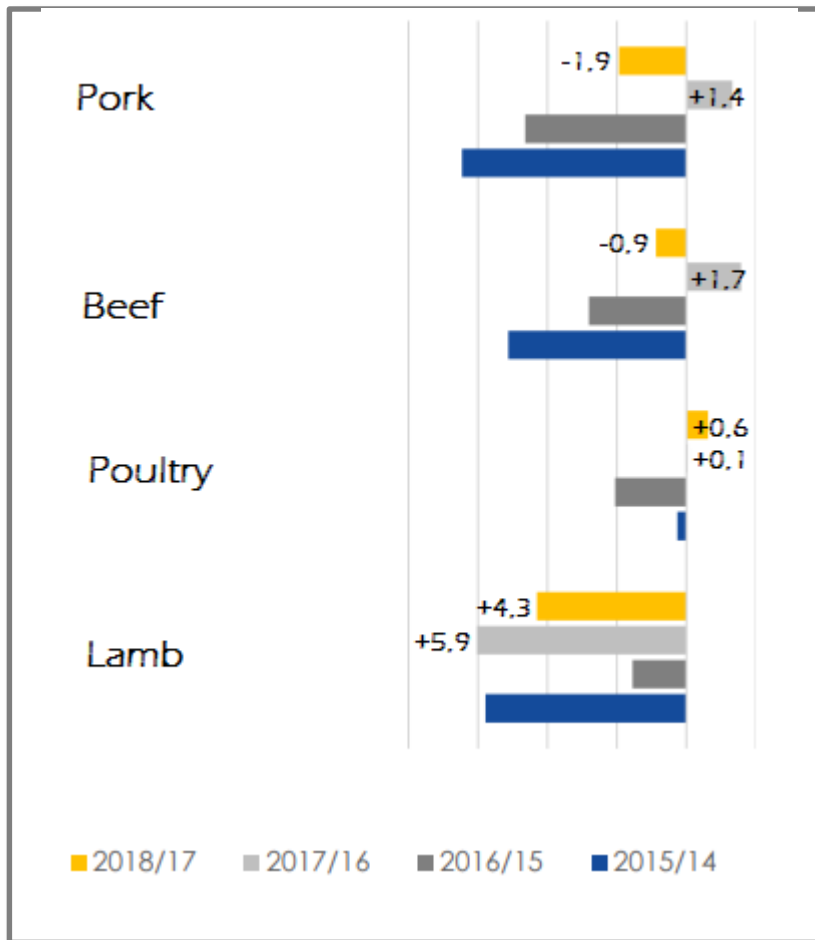


Source: Ismea estimates based on Nielsen data

# Italy: Household Purchases of meat

Period ending: December 2018

## % CHANGE (Volume)



## % CHANGE (VOLUME) 2014-2018

Pork	-11%
Lamb	-17%
Beef	-7%
Poultry	-2%

Source: Ismea estimates based on Nielsen data

# Spain

Updated November 2018

Product category	Volumes (% change Jan.-Nov. '18 vs Jan.-Nov. '17)	Volumes (% change November 2018 vs. November 2017)	Value (% change Jan.-Nov. '18 vs Jan.-Nov. '17)	Value (% change November 2018 vs. November 2017)
Total meat	-2.6%	-2.4%	-0.4%	-0.4%
Pork	-1.8%	-0.6%	-0.6%	1.6%
Beef	-5.6%	-4.8%	-4.1%	-5.4%
Frozen	-10.2%	-3.8%	-3.1%	6.8%
Processed meat	1.5%	1.2%	1.7%	2.4%

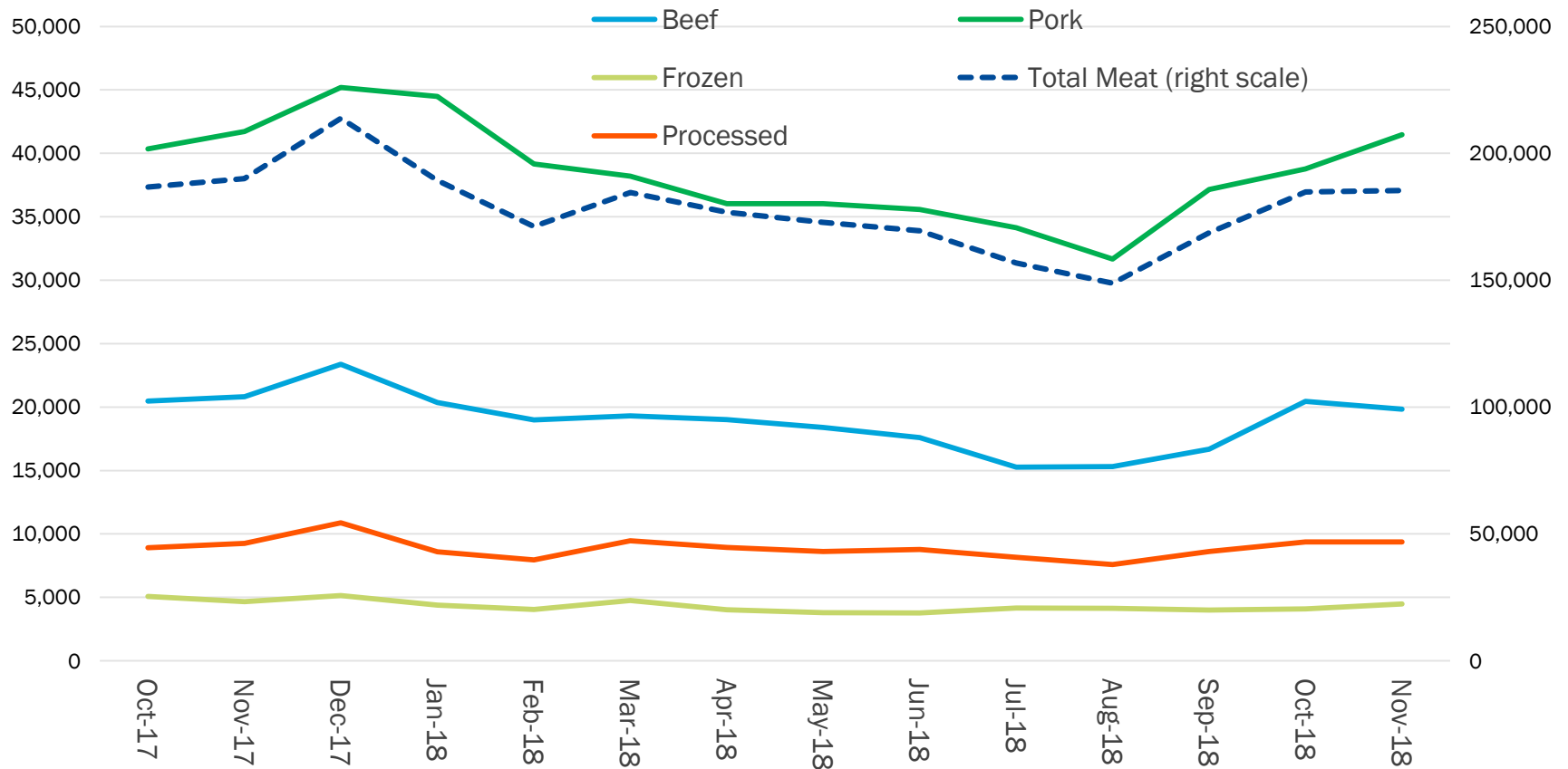
Source: Spanish Ministry of Agriculture



# Spain

Updated November 2018

Meat consumption by product, 000s Kilos

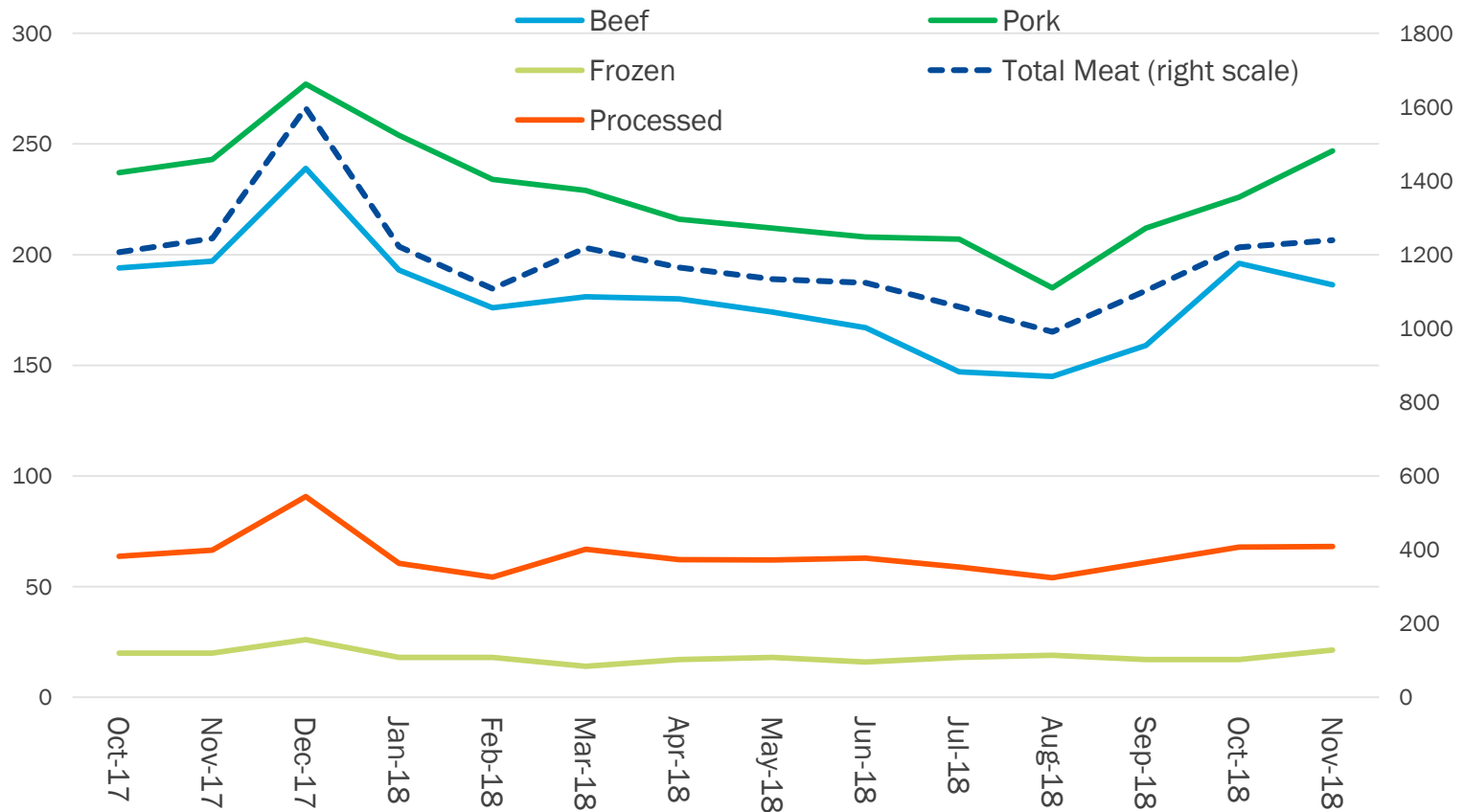


Source: *ibidem*

# Spain

Updated November 2018

Meat consumption by product, million EUR



Source: *ibidem*

# United Kingdom: beef

Period ending: 21 April 2019

Period ending 21st April 2019

	4 weeks ended: 21st April 2019	12 weeks ended: 21st April 2019	52 weeks ended: 21st April 2019
<b>Fresh &amp; Frozen Beef</b>			
<b>Expenditure (£ million)</b>	<b>174.5</b>	<b>522.0</b>	<b>2,181.7</b>
annual change %	+3.5	-4.1	-2.6
<b>Volume (tonnes)</b>	<b>22,966</b>	<b>67,617</b>	<b>278,376</b>
annual change %	+4.5	-3.7	-2.6
<b>Average price (£/kg)</b>	<b>7.60</b>	<b>7.72</b>	<b>7.84</b>
<b>Penetration (%)</b>	<b>54.0</b>	<b>72.6</b>	<b>86.2</b>

	4 weeks ended: 21st April 2019	12 weeks ended: 21st April 2019	52 weeks ended: 21st April 2019
<b>Annual volume change %</b>			
Fresh & frozen beef	+4.5	-3.7	-2.6
- Roasting	+14.0	-20.9	-14.0
- Stewing	+1.8	-9.9	-6.6
- Frying/grilling steak	-3.4	-3.0	+0.8
- Mince	+3.6	+3.3	+0.5
- Marinade	+6.3	+5.4	+7.6
Burgers and grills	+4.7	-0.5	+7.2
Chilled ready meals	-2.8	-2.6	-0.4
Frozen ready meals	+3.3	-3.7	-1.7
Fresh pre-packed hot pies	+7.1	-2.9	-7.3
Fresh pre-packed pasties	+20.4	+2.7	-1.4
Frozen pies/puddings	+0.5	-7.2	-5.7

# United Kingdom: pork

Period ending: 21 April 2019

Period ending	21st April 2019			
		4 weeks ended:	12 weeks ended:	52 weeks ended:
		21st April 2019	21st April 2019	21st April 2019
<b>Fresh &amp; Frozen Pork</b>				
<b>Expenditure (£ million)</b>		<b>56.1</b>	<b>177.6</b>	<b>750.6</b>
annual change %		+4.1	+2.3	-0.2
<b>Volume (tonnes)</b>		<b>12,118</b>	<b>38,952</b>	<b>160,942</b>
annual change %		+7.5	+4.7	+1.2
<b>Average price (£/kg)</b>		<b>4.63</b>	<b>4.56</b>	<b>4.66</b>
<b>Penetration (%)</b>		<b>30.9</b>	<b>50.1</b>	<b>70.6</b>
<b>Annual volume change %</b>				
		<b>4 weeks ended:</b>	<b>12 weeks ended:</b>	<b>52 weeks ended:</b>
		<b>21st April 2019</b>	<b>21st April 2019</b>	<b>21st April 2019</b>
Fresh & frozen pork		+7.5	+4.7	+1.2
- Belly		-4.8	-1.8	-1.9
- Chops/Steaks		+10.7	+3.3	+0.9
- Leg Roasting Joint		+15.4	-4.8	-9.5
- Loin Roasting		+24.4	-0.3	-19.6
- Shoulder Roasting Joint		+10.5	+33.0	+25.8
- Marinades		-15.5	-4.8	+16.2
- Pork Ribs		-2.9	-2.3	+1.2
- Mince		+3.5	+5.0	+3.1
Bacon		-5.4	-6.0	-2.6
Pork Sausages		-2.3	-1.8	+1.0
Fresh PP Pork Pies		+3.0	+2.7	+4.7
Fresh PP Sausage Rolls		-1.7	+5.2	+4.2
Pork Sliced Cooked Meats (incl Ham)		+1.0	-0.6	-0.1
Ready Meals (chilled)		-0.6	+1.3	+2.5