TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

Meat Market Observatory

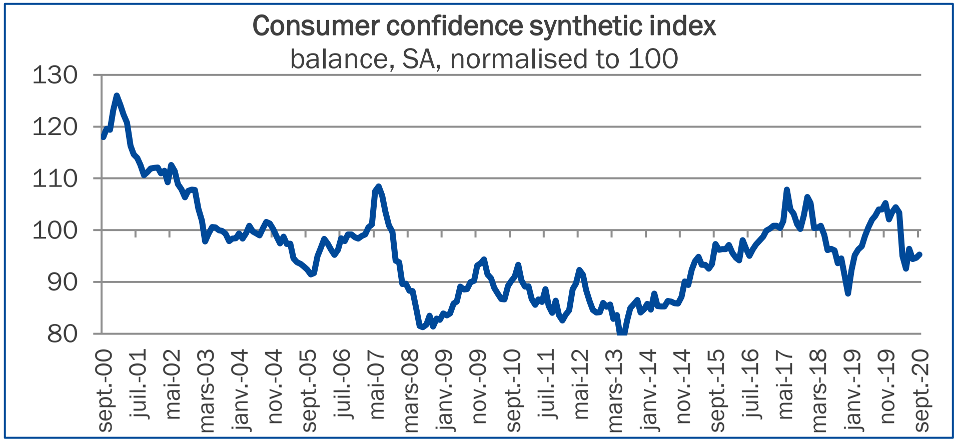
26 OCTOBER 2020

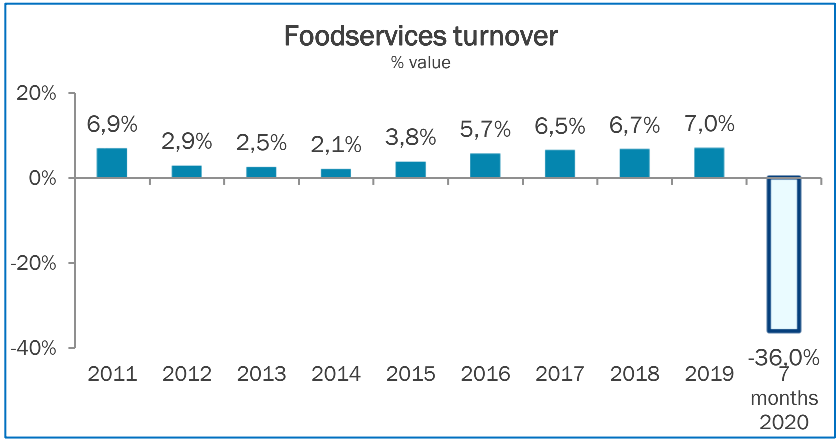
EuroCommerce for retail & wholesale

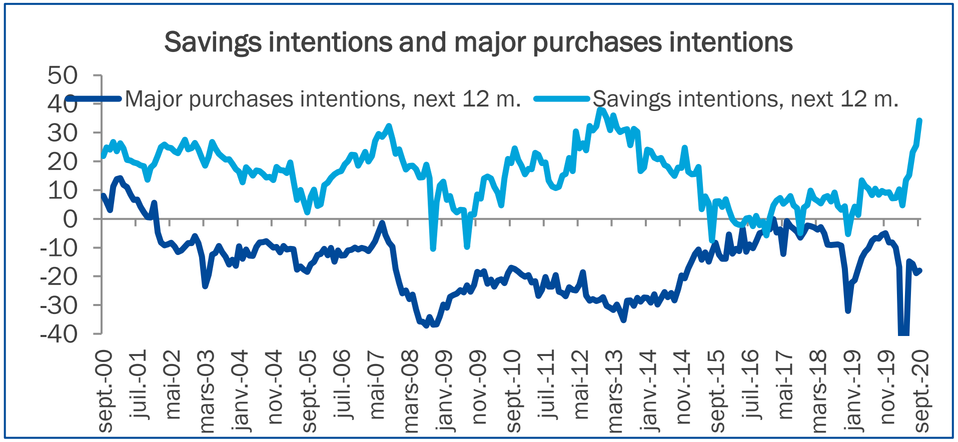
France

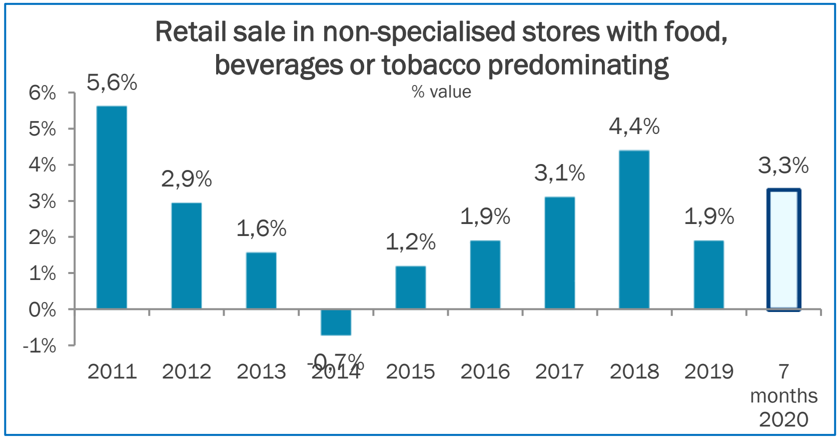
Economic context (1)

① Households are relatively pessimistic and tend to favour savings over consumption.
② For the global food market, the growth in hypermarket and supermarket sales will not be enough to offset the collapse of the Foodservices business.







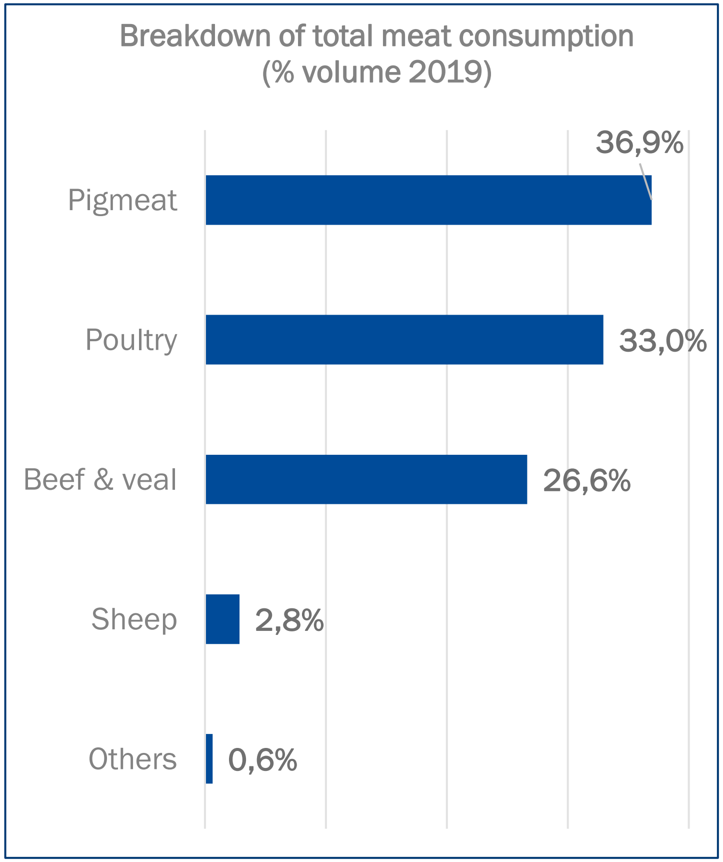


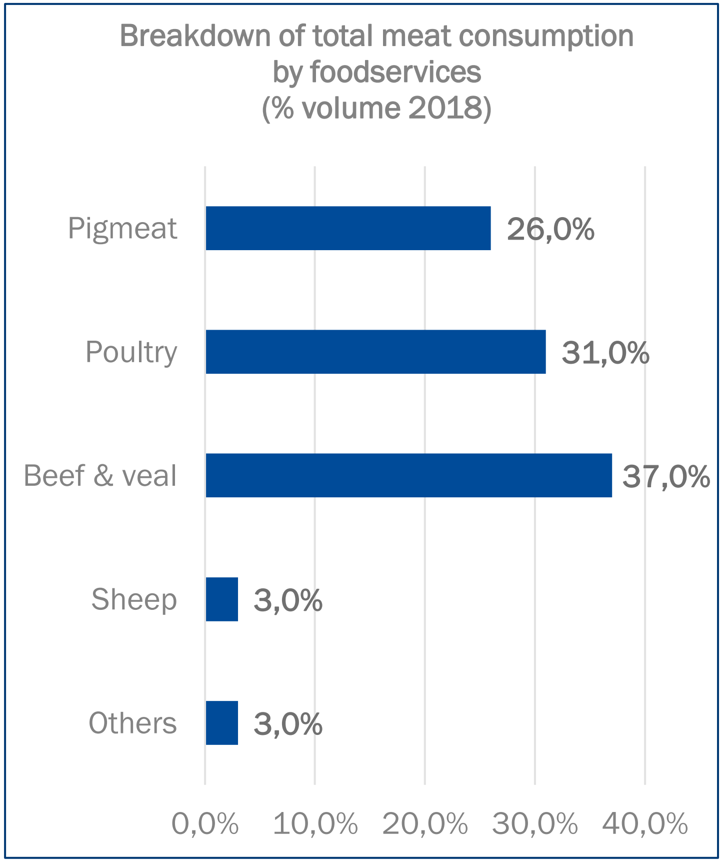
Source : INSEE

France

Economic context (2)

The segmentation of total meat consumption and consumption in out-of-home catering is different. We can see here that pigmeat is globally the first meat consumed in France (37% of volumes). In the out-of-home catering segment, beef is the first meat purchased.

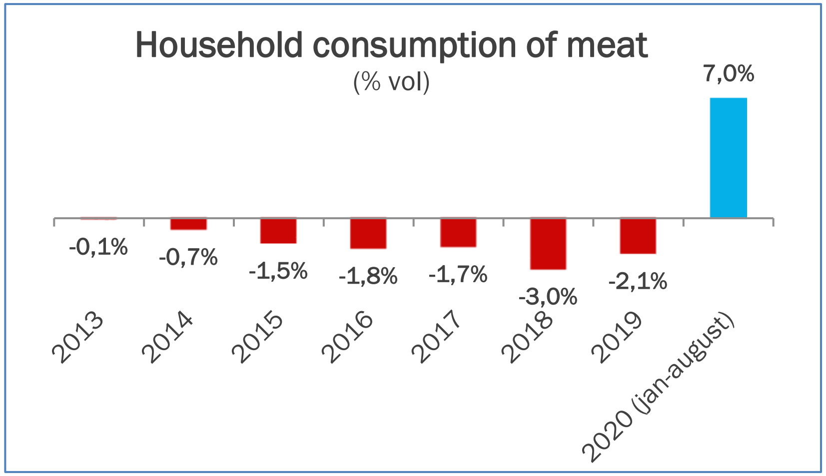


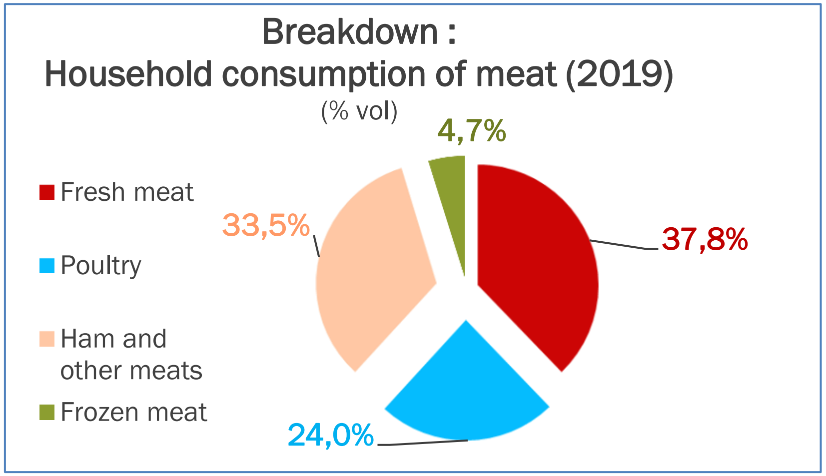


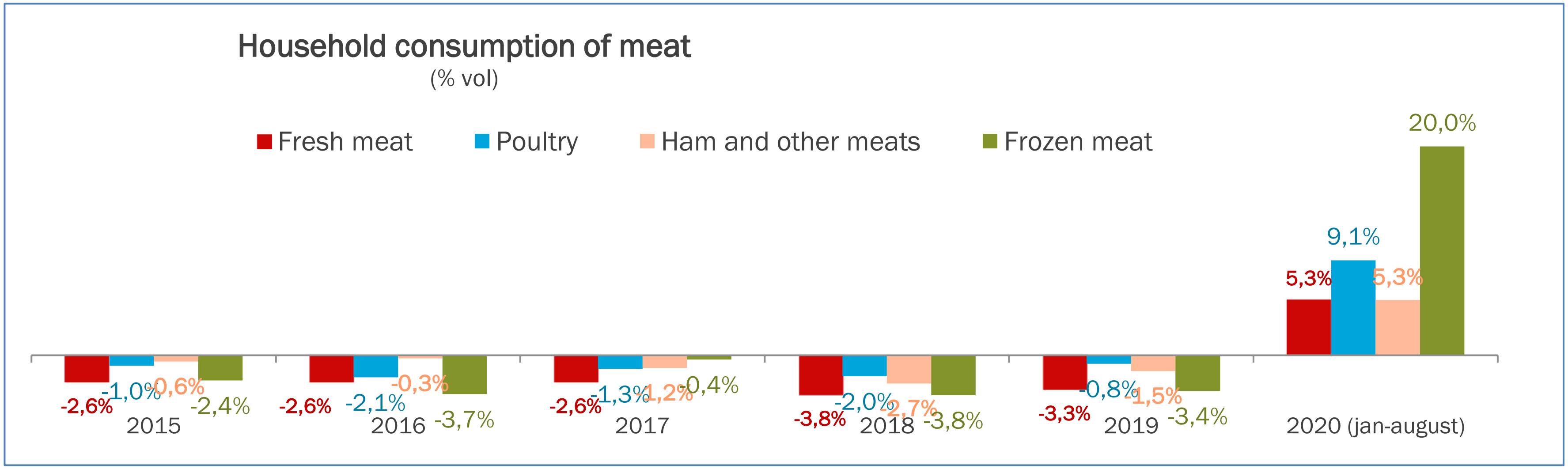
Source : FranceAgriMer

France

Period ending 31 August 2020







Source: Kantar Worldpanel

France

Period ending 31 August 2020

Product category	volumes (% change Year-to-year) (jan–august 2020)	price (% change Year-to-year) (jan-august)	Average prices (€ / kg)
Fresh meat	5,3%	2,8%	11,49
Fresh beef	0,6%	2,8%	15,41
Fresh veal	-0,3%	0,4%	16,37
Fresh lamb	-6,6%	3,6%	15,55
Fresh pork	6,8%	6,4%	8,00
Tripe Products	-10,3%	3,3%	9,46
Processed meat, including ground meat	11,5%	4,1%	10,52
Poultry	9,1%	1,3%	8,15
Frozen Meat	20,0%	1,0%	7,36
Ham and other meats	5,3%	4,9%	11,66

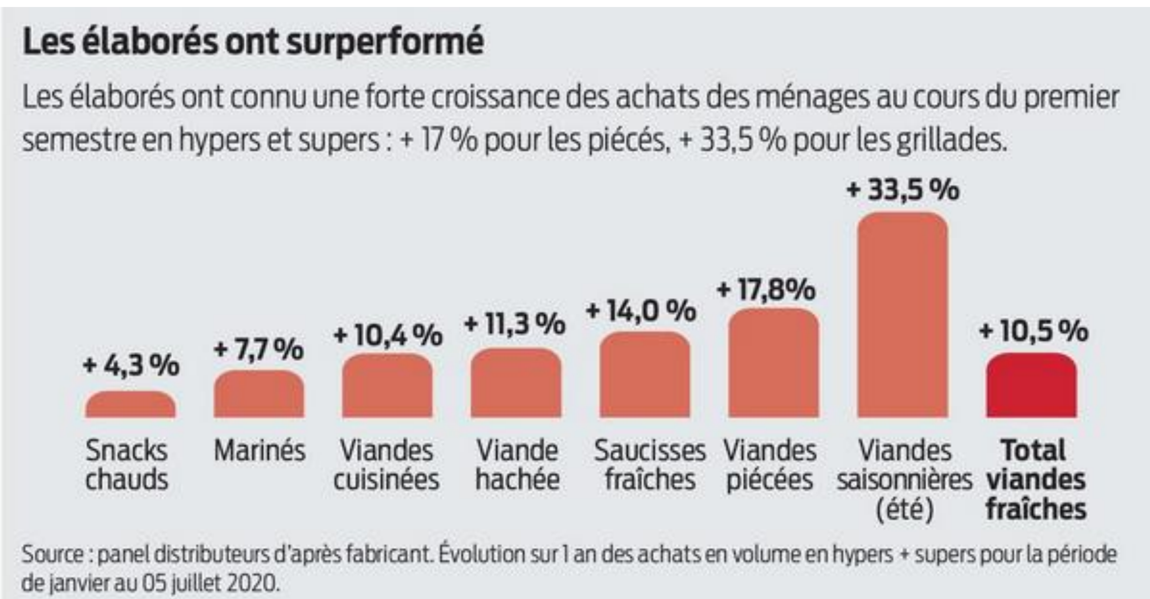
Source: Kantar Worldpanel

EuroCommerce

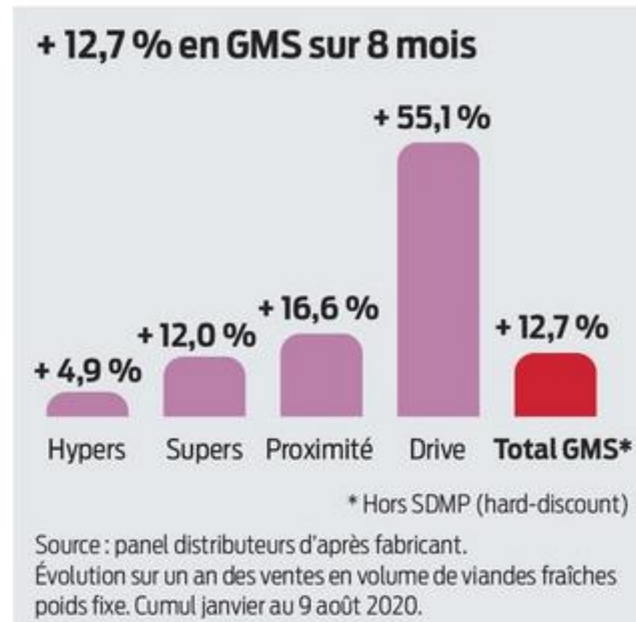
France

Fresh meat : Sales in HM & SM

As a result of the health crisis and the closure of restaurants, butcher's meat sales rose sharply in hypermarkets and supermarkets during the first 6 months of the year: +10,5% in value. Seasonal meats, particularly for barbecues, rose sharply: +33.5%. This was the most dynamic category.



In terms of distribution channels, sales of meat by click&collects grew by more than 55% in the first 8 months of the year. Convenience was also very dynamic. These trends are relatively similar to those observed in all FMCG markets.

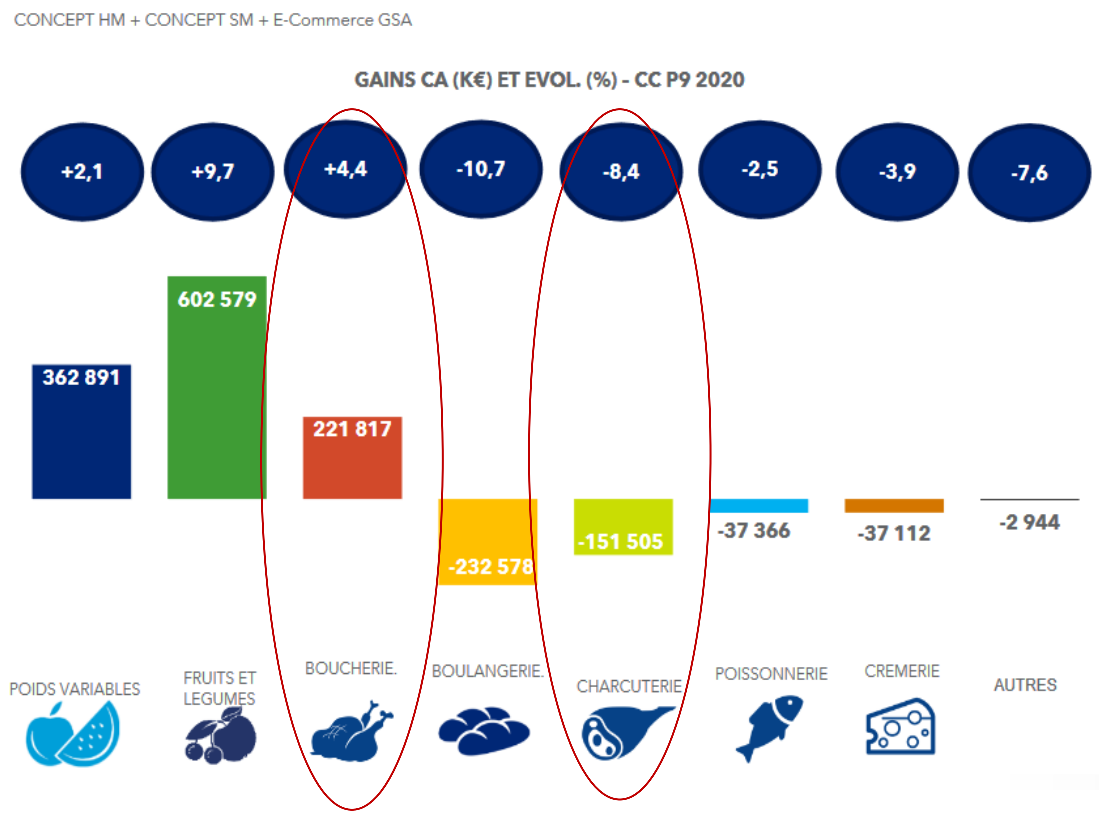


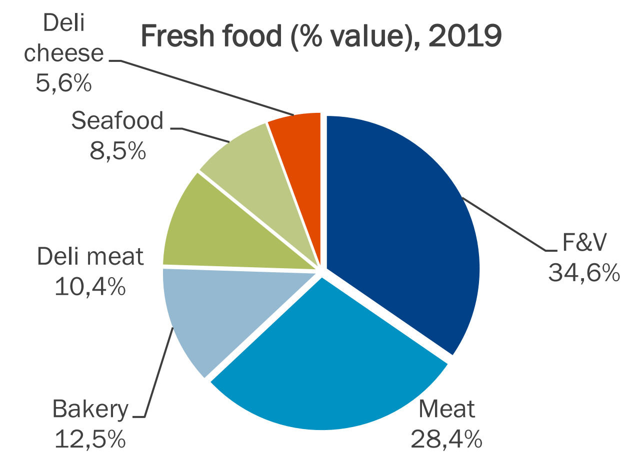
Source: Linéaires

France

Focus on fresh food in hypermarkets and supermarkets

The sales of fresh food products (unpacked products) increased during the first 9 months of the year, this increase is mainly linked to the sales of fruits & vegetables and meat.





Source: IRI (hypermarkets, supermarkets, e-commerce

France

Alternative meat markets : the growth rate slows down

Plant-based options represented more than 100 M€ in 2019 in hyper & supermarkets (+5,1%). The market for plant-based substitutes remains very modest compared to the whole meat market. In addition, a quasi-stagnation of growth was observed during the first 8 months of 2020. The crisis and the growing suspicion of consumers towards processed products may be factors explaining this trend.

		2019	YtoD 6 september 2020
TRAITEUR VEGETAL	**Ventes Valeur (1000 €)**	**103 431**	**72 330**
	Evol a 1 an des Ventes Valeur(%)	**+5,1%**	**+0,5%**
PLATS CUISINES TRAITEUR VEGETAL	Ventes Valeur (1000 €)	14 147	5 624
	Evol a 1 an des Ventes Valeur (%)	-11,2%	-45,8%
AIDES CULINAIRES TRAITEUR VEGETAL	Ventes Valeur (1000 €)	3 983	3 460
	Evol a 1 an des Ventes Valeur(%)	+27,5%	+30,5%
SUBSTITUTS TRAITEUR VEGETAL	Ventes Valeur (1000 €)	85 301	63 246
	Evol a 1 an des Ventes Valeur(%)	+7,5%	+7,3%

Source: IRI

France

Alternative meat markets : the offer continues to expand

① According to a recently study, "The State of the World Food Situation in 2020", which compiles the results of several studies, conducted as part of a partnership between Kantar and the Salon International de l'Alimentation (Sial), the meat consumption tends to decrease, especially in Canada, the United Kingdom and Germany, with a surge in "vegetable substitutes" in Anglo-Saxon countries. Conversely, Latin countries remain great meat lovers and substitutes should remain a "niche market". However, the Sial jury, which awarded several innovative products in october, noted that many projects of meat and fish substitutes were proposed to it.

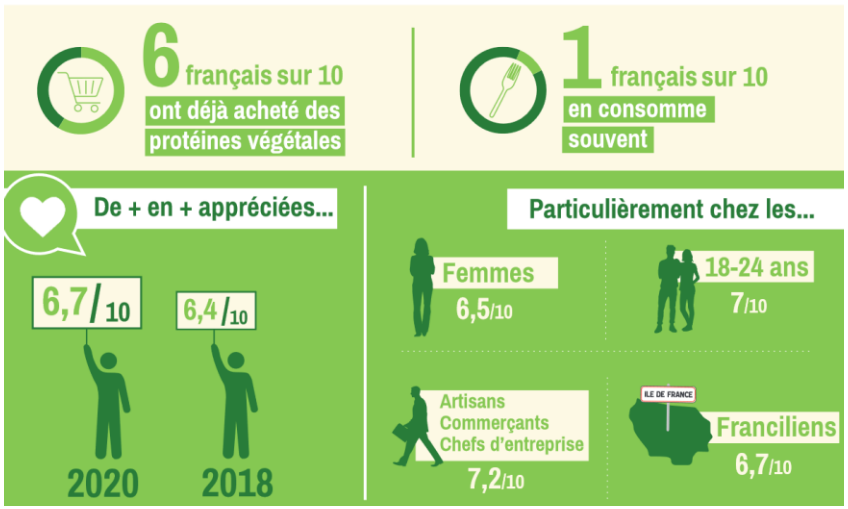
② In France, the offer continues to grow with here two examples of meat substitutes. Céréal Bio with “haché soja et blé” et “Emincés soja et blé” or “Les Nouveaux Fermiers with “steak végétaux”, etc. There is presently a controversy in France about the terms used by the start up Les Nouveaux Fermiers (“meat” and “farmers”). The inter-branch organizations Anvol, Inaporc and Interbev have launched a lawsuit against the company.
NB : The law "on the transparency of information on food products" adopted on May 27th that prohibits producers of meat substitutes from using terms usually used to designate food of animal origin has not yet come into force. It should be done by the end of the year.

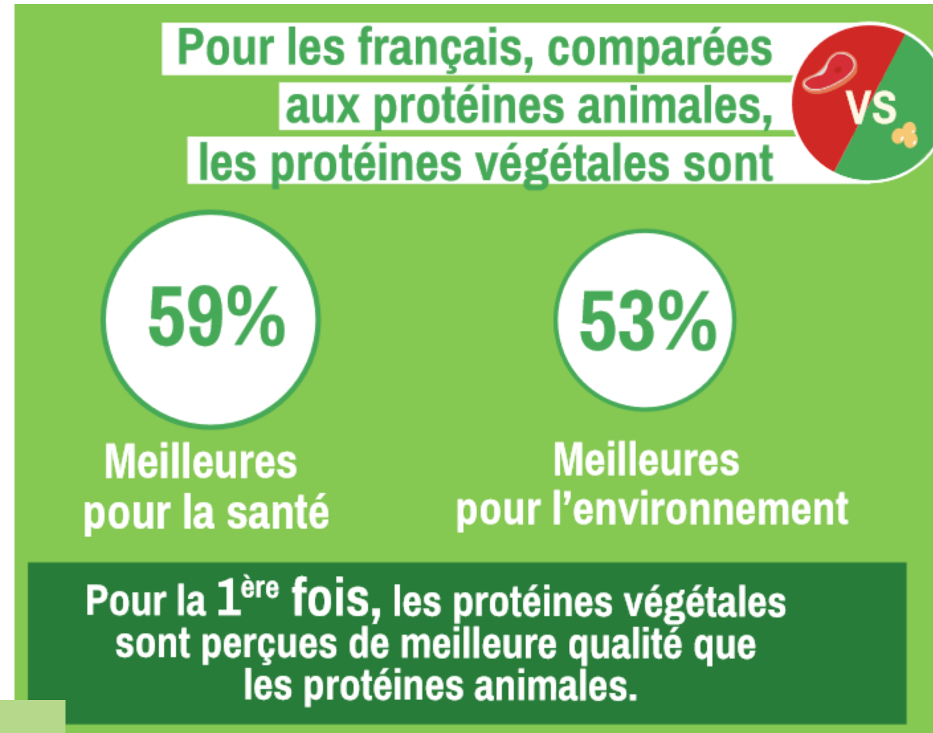
La nouvelle gamme de simili-carnés Céréal Bio compte 4 références peu transformées à base de soja français.

France

Opinion Polls : Vegetable proteins are more and more appreciated by consumers.

Le groupement d'étude et de promotion des protéines végétales (GEPV) [Group for the Study and Promotion of Vegetable Proteins] publishes its 5th consumer barometer. The study shows that the French have an increasingly positive perception of vegetable proteins.





Source : Eude réalisée par Topo Lab pour le GEPV et Protéines France auprès de 1008 sondés en juillet 2020

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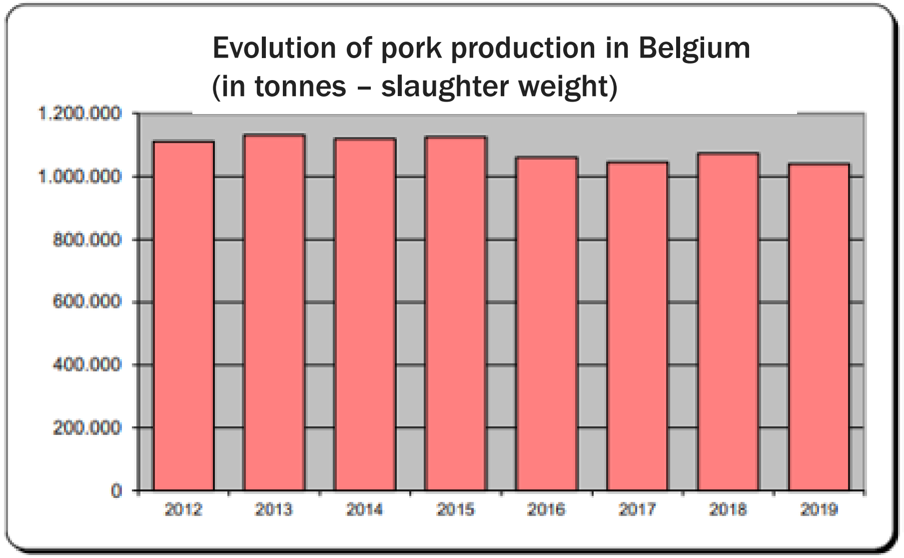
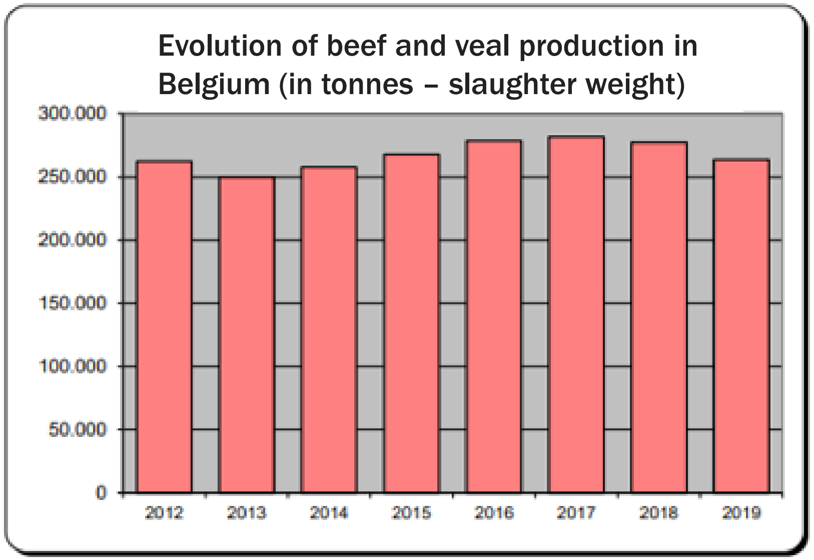
Belgium

Net production in Belgium (in tonnes)

	2012	2013	2014	2015	2016	2017	2018	2019
Pork	1.109.704	1.130.665	1.118.417	1.124.310	1.060.617	1.044.636	1.073.194	1.038.916
Beef and veal	262.280	249.913	257.666	267.877	278.362	281.536	277.312	263.750
Sheep and goat meat	2.487	2.754	2.763	2.758	3.111	3.235	3.134	3.036
Horse meat	2.889	2.670	2.542	2.610	1.893	1.772	1.868	1.730

Bron: Statbel





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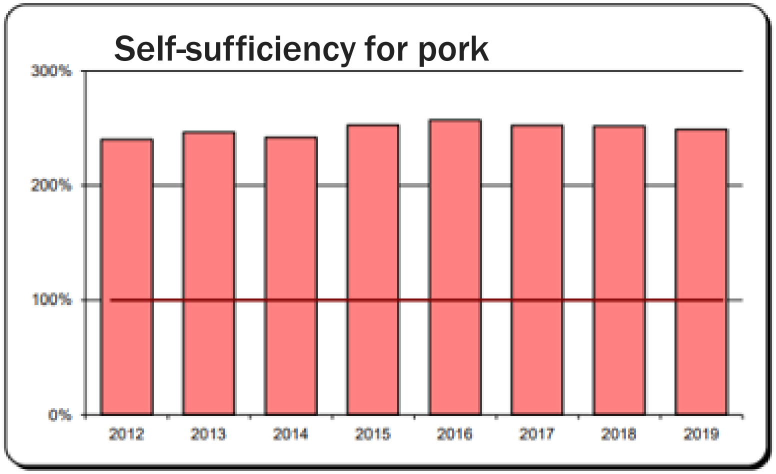
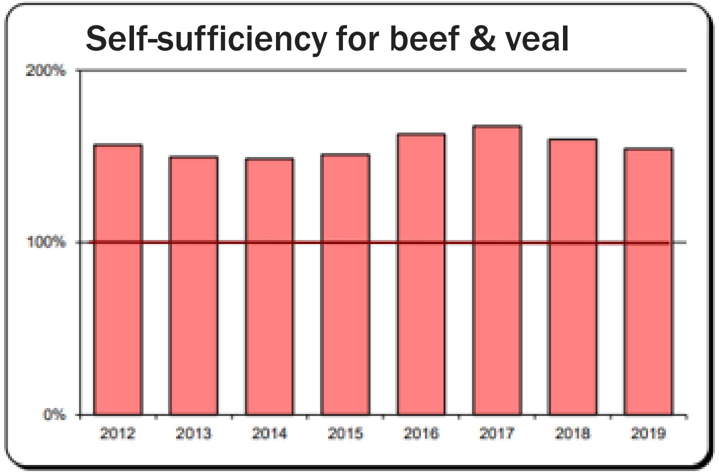
Belgium

Belgian self-sufficiency for meat

	2012	2013	2014	2015	2016	2017	2018	2019
Pork	240%	246%	242%	253%	257%	252%	252%	249%
Beef and veal	157%	150%	148%	151%	163%	167%	160%	154%
Sheep and goat	5%	7%	7%	10%	12%	12%	13%	17%
Horsemeat	26%	23%	22%	39%	24%	22%	17%	17%
Edible offal	365%	300%	336%	392%	390%	397%	367%	392%
Totaal vlees (incl. gevogelte, wild en konijn)	**205%**	**210%**	**201%**	**211%**	**224%**	**224%**	**220%**	**216%**

Bron: Statbel

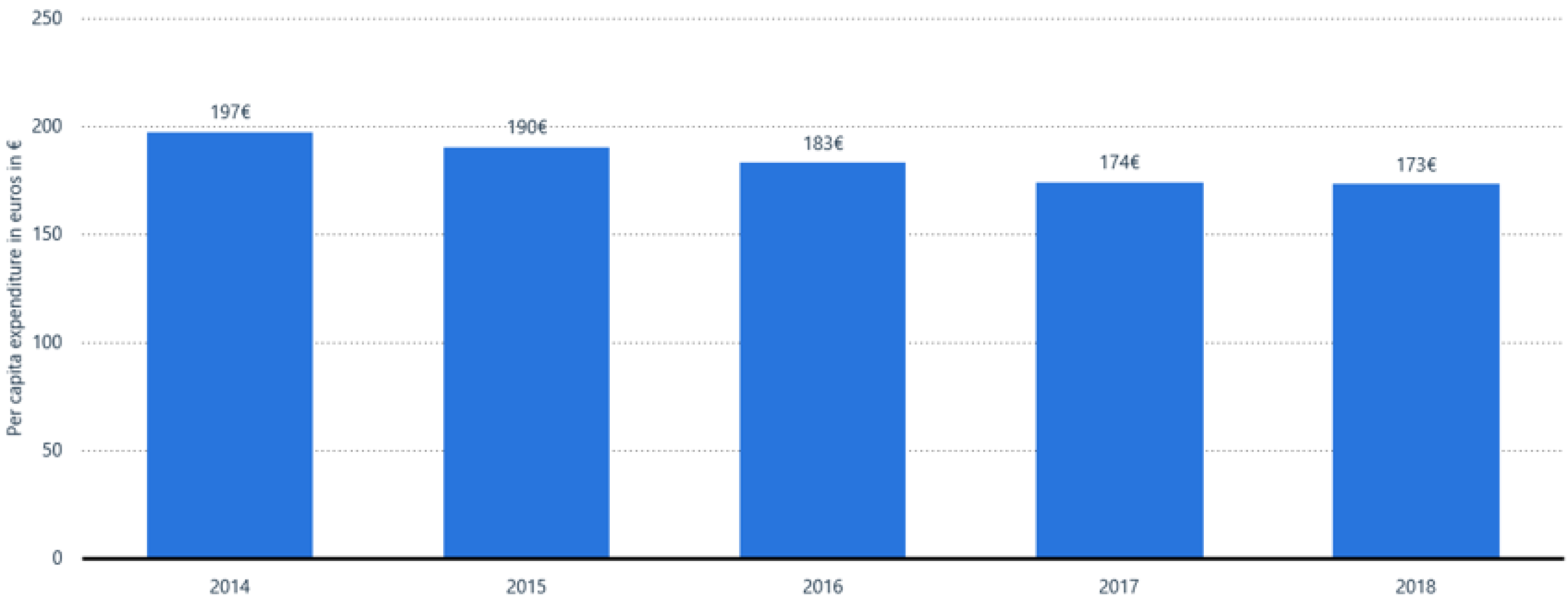




Belgium

Per capita expenditure on meat in Belgium from 2014 to 2018 (in euros)

Per capita expenditure on meat in Belgium 2014-2018



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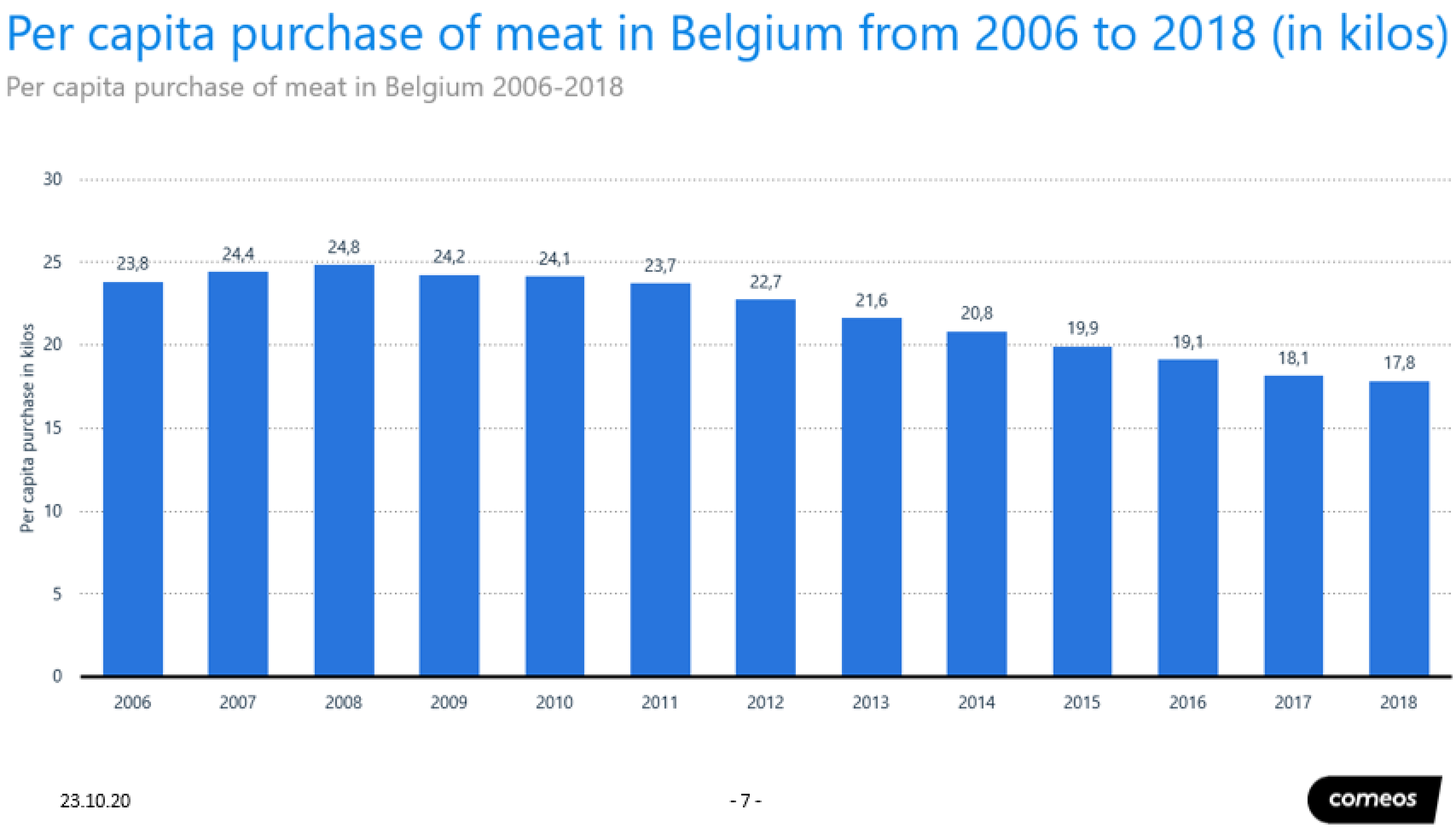
Belgium



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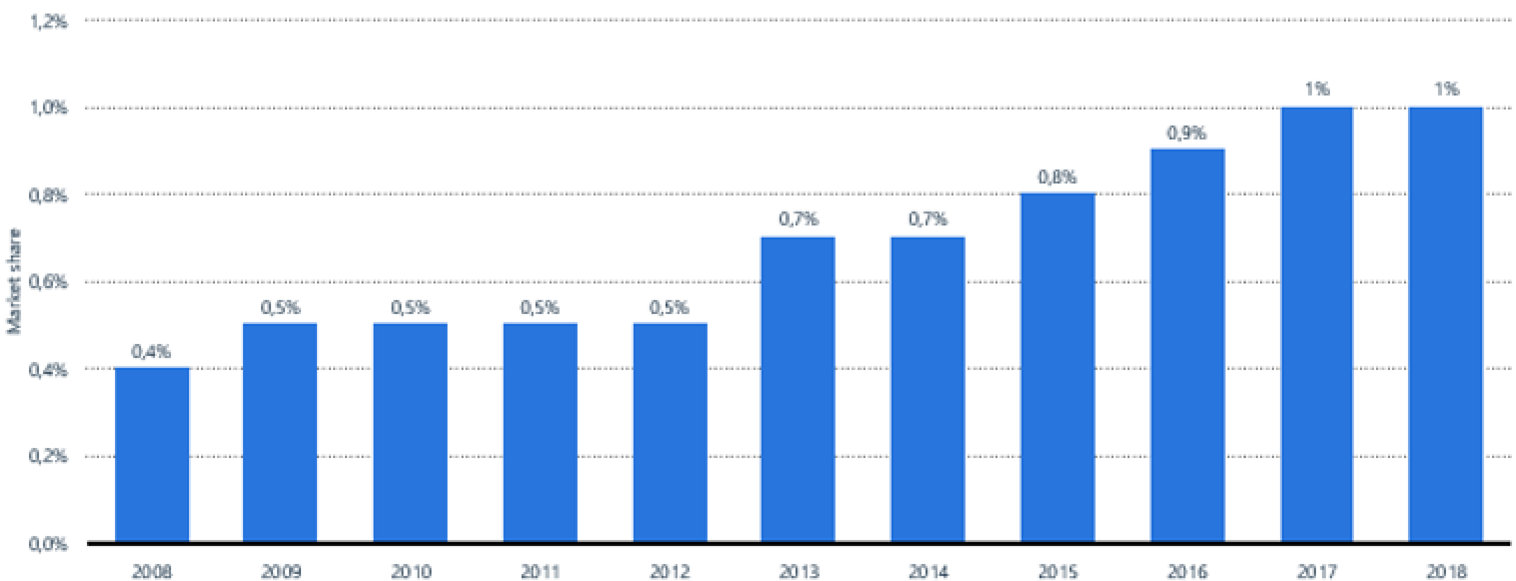
Belgium

Market share of organic meat sales in Belgium from 2008 to 2018*

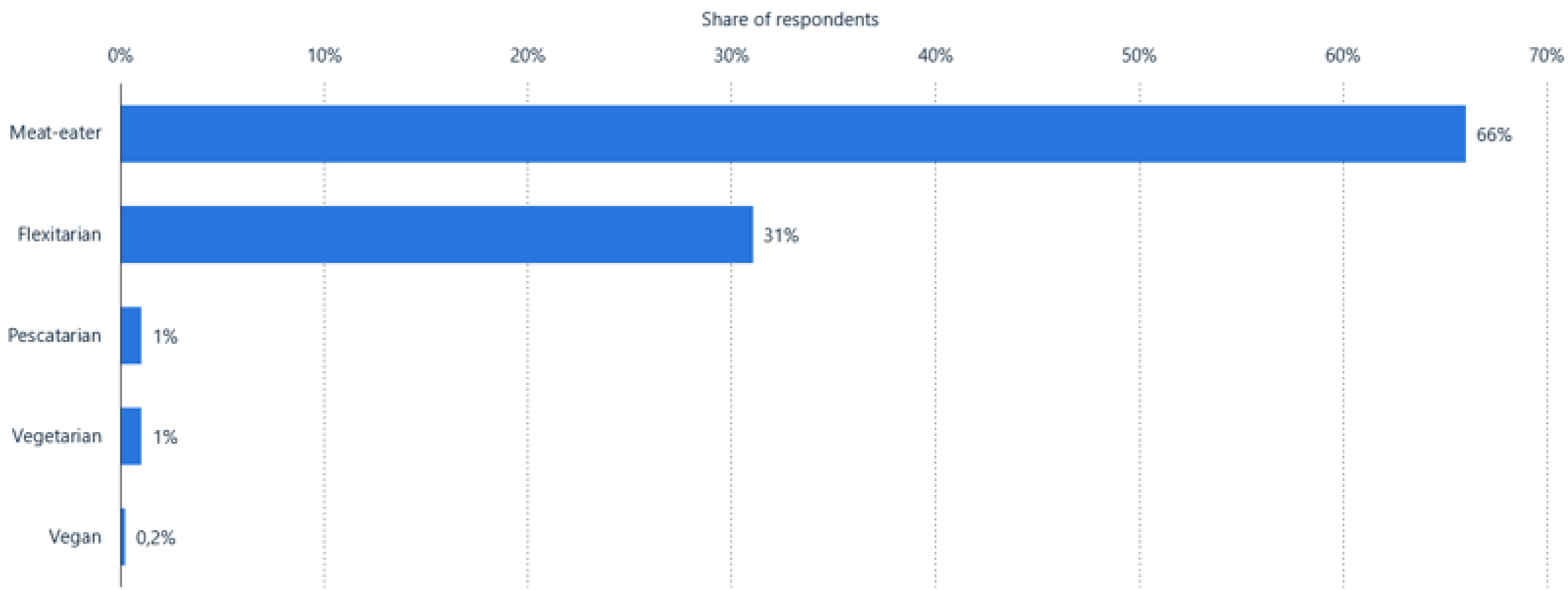
Market share of organic meat sales in Belgium 2008-2018



Belgium

Meat eating habits in Belgium in 2019

Meat eating habits in Belgium 2019



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Belgium

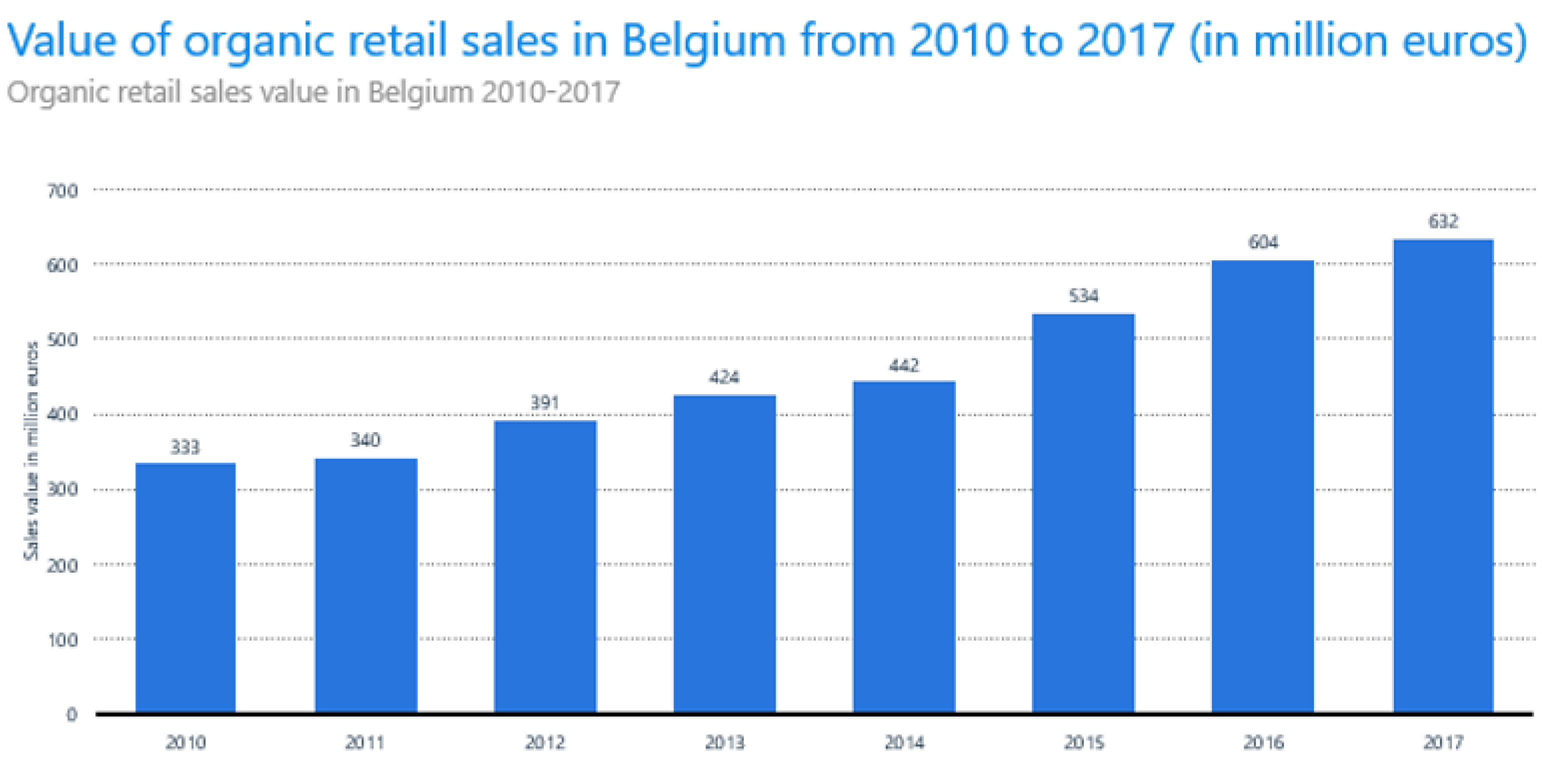
Évolution de la consommation humaine apparente de viande en poids carcasse en Belgique (2010 - 2019)

Consommation humaine apparente (kg/habitant)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Viande bovine	18,3	16,4	15,8	15,4	15,5	15,4	14,7	14,3	14,7	14,3
Viande porcine	39,6	44,2	42,4	42,1	42,3	40,7	38,1	38,7	38,6	38,3
Viande ovine et caprine	1,5	1,7	1,2	1,4	1,4	1,2	1,1	1,1	1,4	1,3
Viande équine	0,7	0,8	0,8	0,7	0,7	0,6	0,5	0,4	0,7	0,5
Viande de volaille	15,9	12,4	11,6	10,8	15,0	13,9	13,5	13,0	13,8	14,6
Viande d'autres espèces	4,2	2,7	2,5	2,5	3,3	4,4	3,4	3,9	3,8	4,1
Abats comestibles	2,1	2,9	2,4	2,9	2,6	2,2	2,1	2,1	2,3	2,1
Total (poids carcasse)	82,4	81,1	76,7	75,9	80,8	78,4	73,5	73,6	75,2	75,2

Source: statbel

EuroCommerce

Belgium



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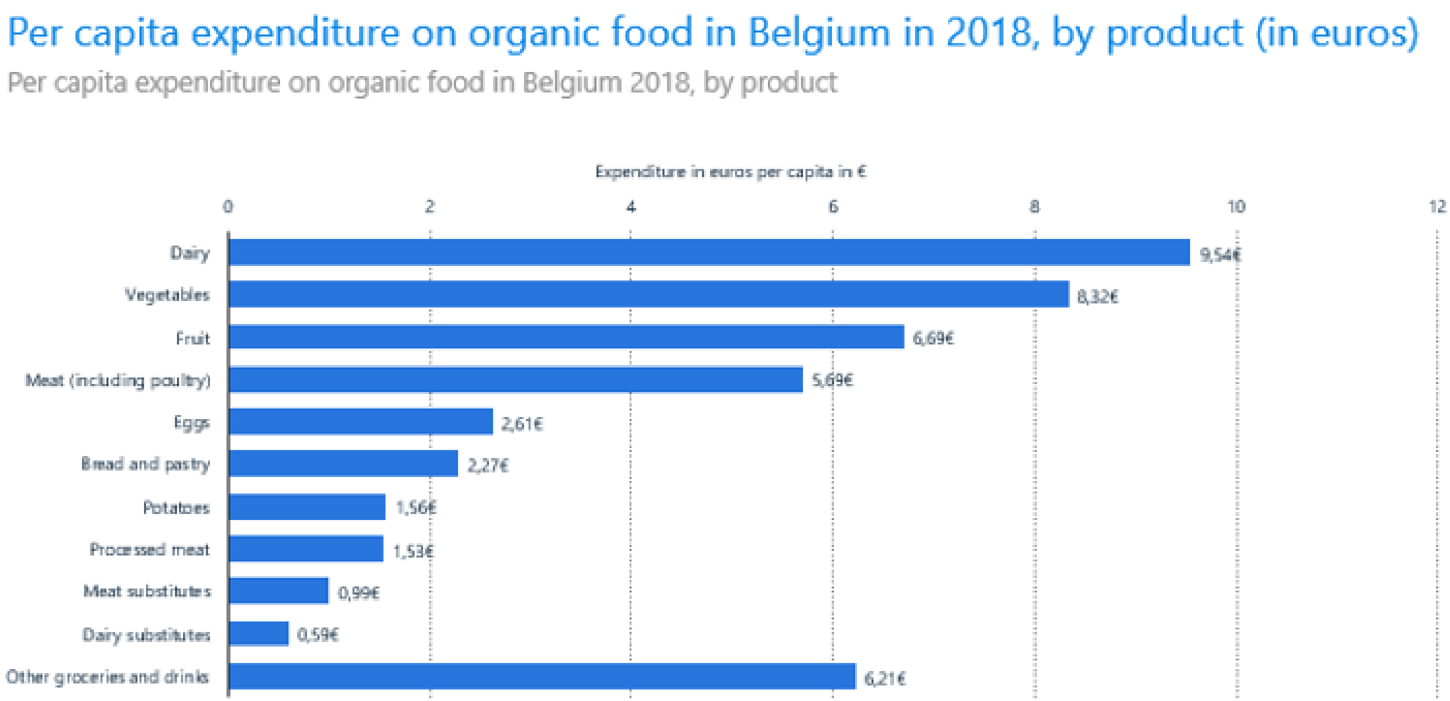
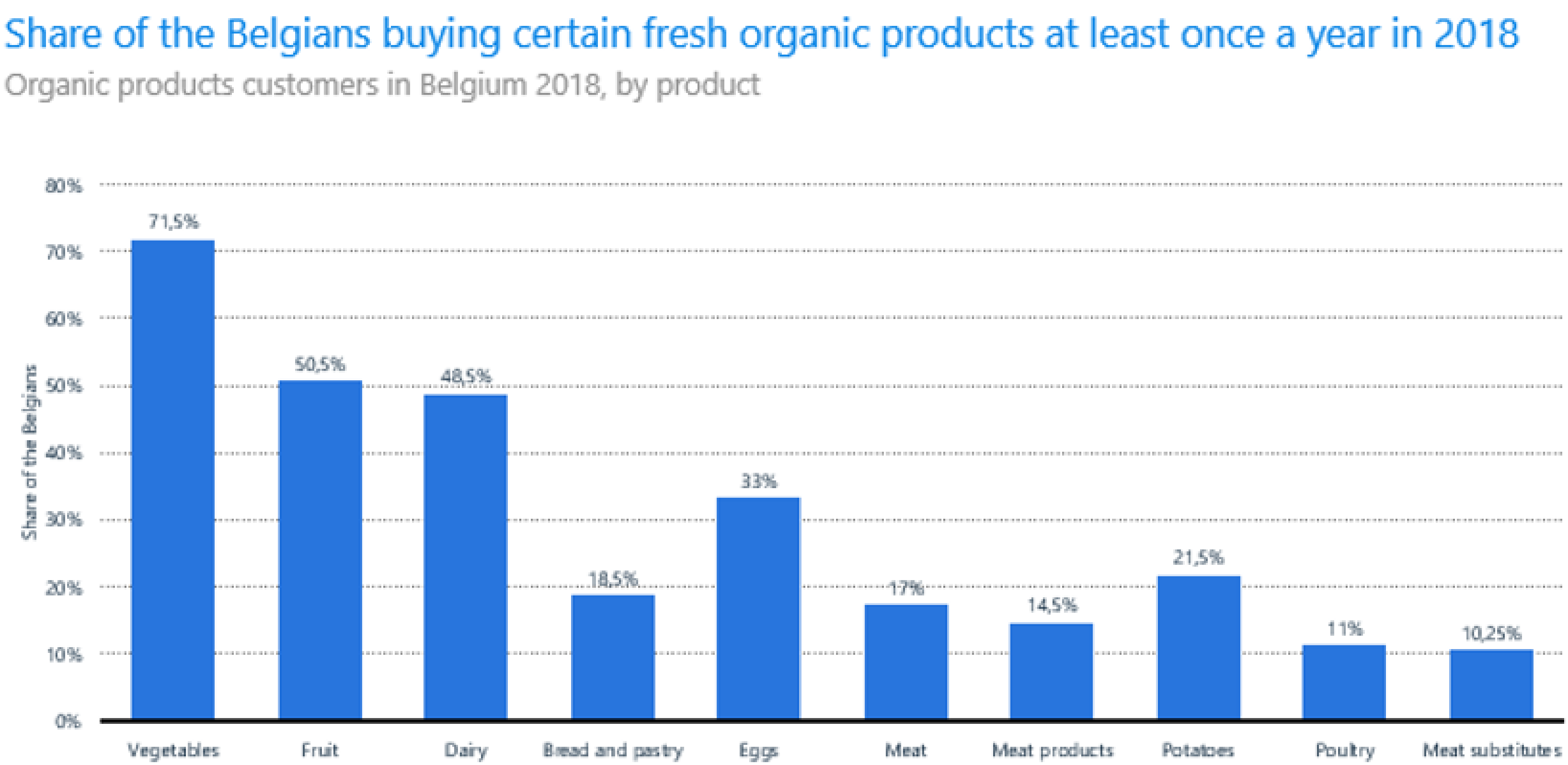
Belgium


Per capita expenditure on organic food in Belgium in 2018, by product (in euros)
Per capita expenditure on organic food in Belgium 2018, by product
Expenditure in euros per capita in €
0
2
4
6
8
10
12
Dairy
Vegetables
Fruit
Meat (including poultry)
Eggs
Bread and pastry
Potatoes
Processed meat
Meat substitutes
Dairy substitutes
Other groceries and drinks
9,54€
8,32€
6,69€
5,69€
2,61€
2,27€
1,56€
1,53€
0,99€
0,59€
6,21€

Belgium



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Italy

Meat – 3Q2020 *and* YTD Sept2020

Total Modern Retail
(only fixed weight)

Product category	VALUE (3Q2020 vs. 3Q2019 - % change)	VOLUME (3Q2020 vs. 3Q2019 - % change)	VALUE (YTDSep20 vs. YTDSep19 - % change)	VOLUME (YTDSep20 vs. YTDSep19 - % change)
Preserved Meat	-2,9	-3,6	+5,4	+3,7
Frozen Meat	+10,0	+10,3	+14,5	+12,8
Fresh Meat (Fixed weight)	+8,7	+6,2	+15,4	+10,0
Fresh meat	+7,9	+6,0	+13,8	+8,2
Processed meat - Poultry	+6,7	+6,9	+9,7	+6,8
Processed meat - Beef	+15,9	+10,8	+26,8	+21,0
Processed meat - Pork	+6,8	-1,3	+22,5	+13,5
Processed meat - Horse	-9,4	-9,8	-5,0	-5,1
Salumi (Fixed weight)	+8,5	+2,1	+14,0	+7,3
Cold cuts	+8,6	+3,8	+12,5	+6,7
Sliced	+12,5	+4,4	+21,8	+9,6
Pre-Cooked	+1,6	-1,9	+12,4	+6,8

Source: Nielsen – Market Track

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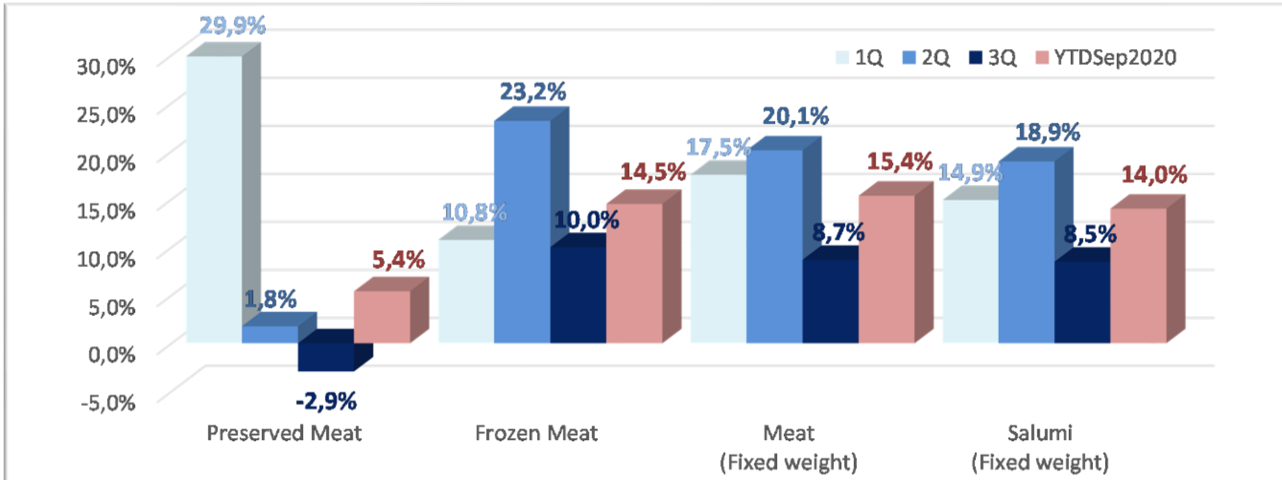
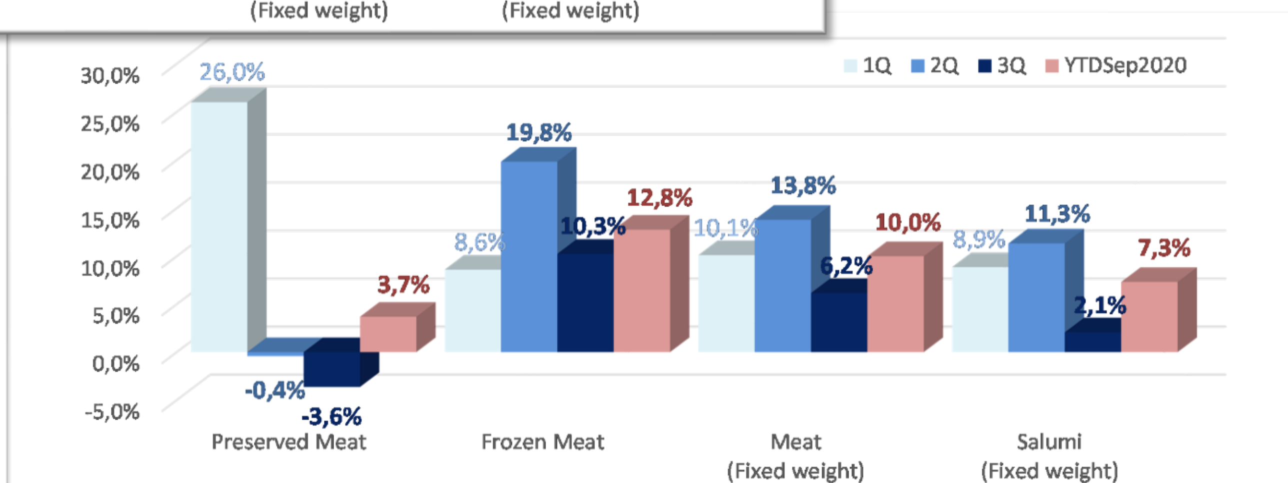
Italy

Meat – Trend growth (*Percentage change on the same period of the previous year)*

VALUE



VOLUME



Source: Nielsen – Market Track

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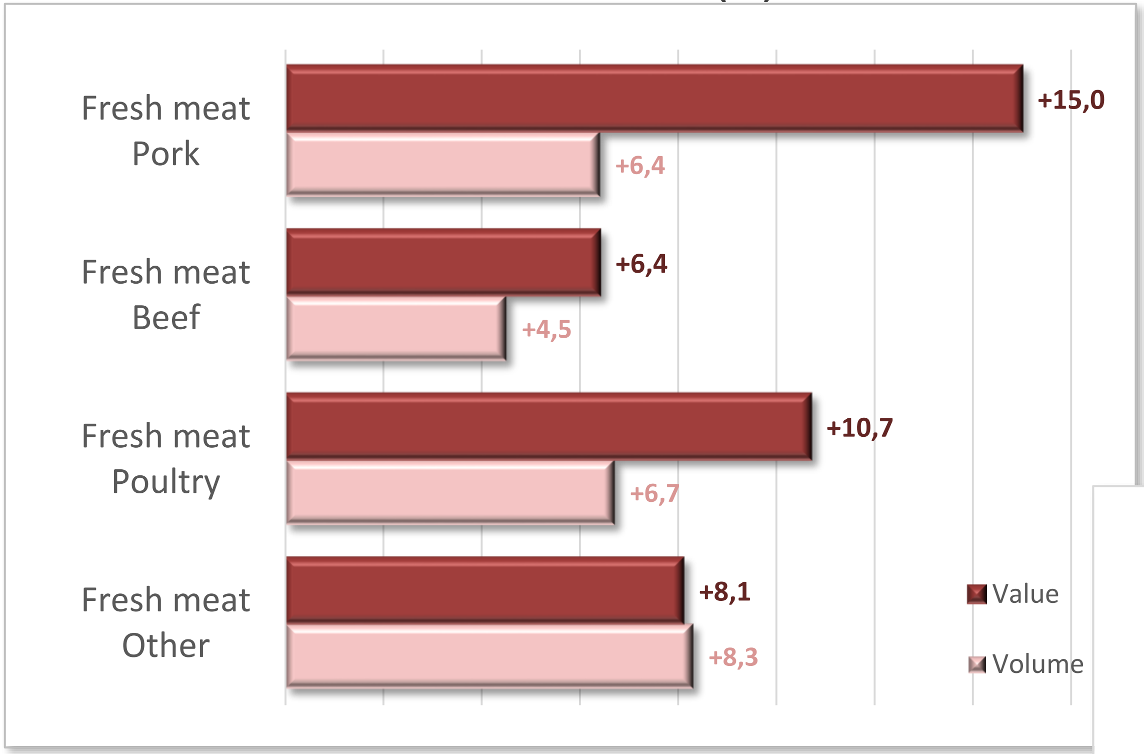
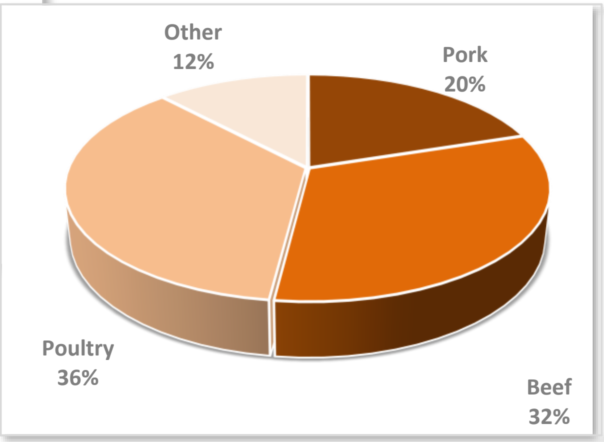
Italy

Domestic demand of meat - Jan-Aug 2020

TREND GROWTH (%)

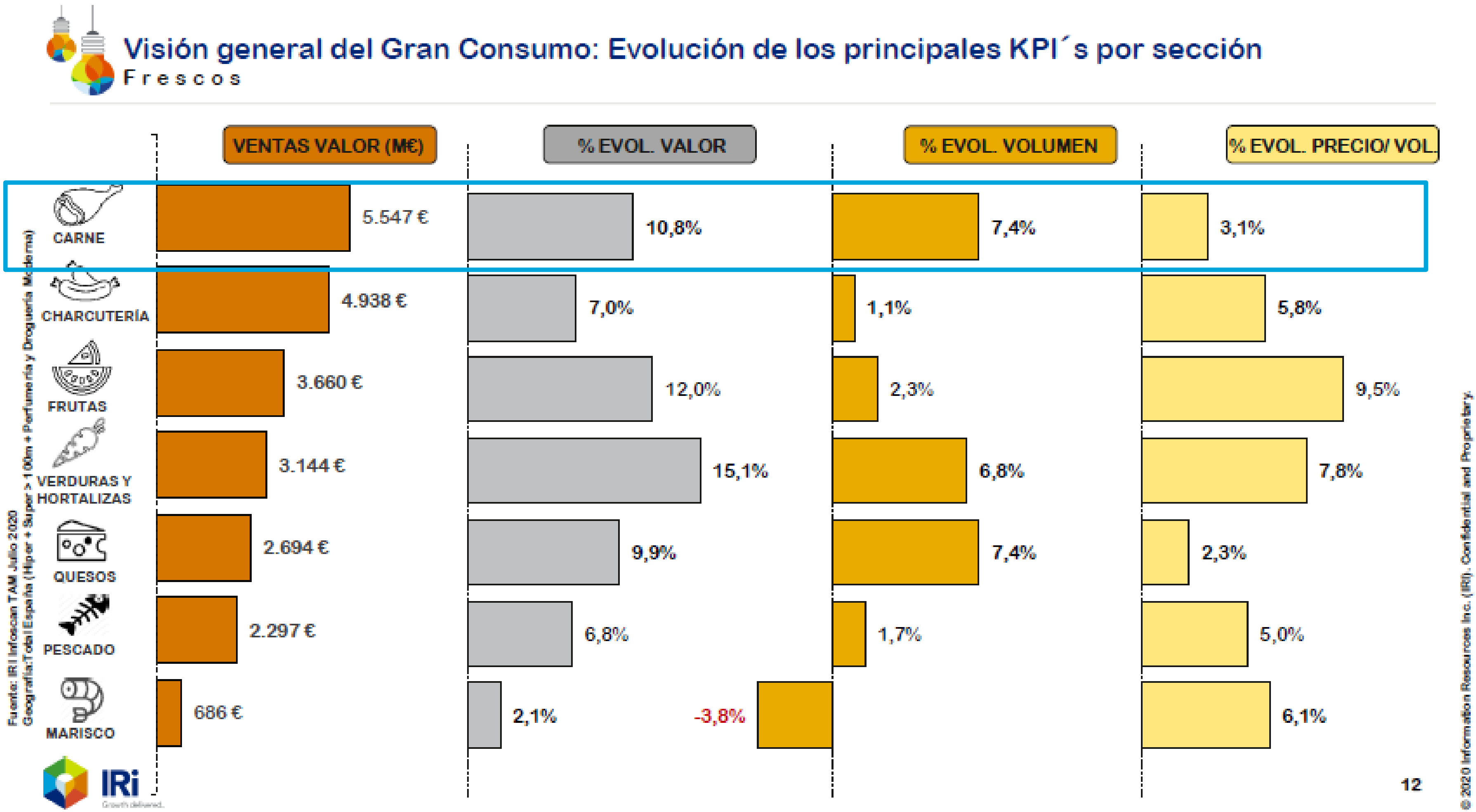


SHARE IN VOLUME



Source: Ismea based on Nielsen data, Consumer Panel Service

Spain



Visión general del Gran Consumo: Evolución de los principales KPI´s por sección
Frescos
VENTAS VALOR (M€)
% EVOL. VALOR
% EVOL. VOLUMEN
% EVOL. PRECIO/ VOL.
CARNE
5.547 €
10,8%
7,4%
3,1%
CHARCUTERÍA
4.938 €
7,0%
1,1%
5,8%
FRUTAS
3.660 €
12,0%
2,3%
9,5%
VERDURAS Y HORTALIZAS
3.144 €
15,1%
6,8%
7,8%
QUESOS
2.694 €
9,9%
7,4%
2,3%
PESCADO
2.297 €
6,8%
1,7%
5,0%
MARISCO
686 €
2,1%
-3,8%
6,1%
Fuente: IRI Infoscan TAM Julio 2020
Geografía:Total España (Hiper + Super > 100m + Perfumería y Droguería Moderna)
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Growth delivered.
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