



TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

Meat Market Observatory

03 October 2017

Belgium

Period ending August 2017

Product category	price (% change Aug 2017 vs Aug 2016)	price (% change Jan – Aug 2017 vs Jan – Aug 2016)
Total pigmeat	5.0%	2.8%
Delicatessen (salami, ham, prosciutto, etc)	1.5%	0.6%
Processed pork (élaborés de viande)	1.9%	1.6%
Total beef and veal	1.4%	1.3%

Source: Comeos

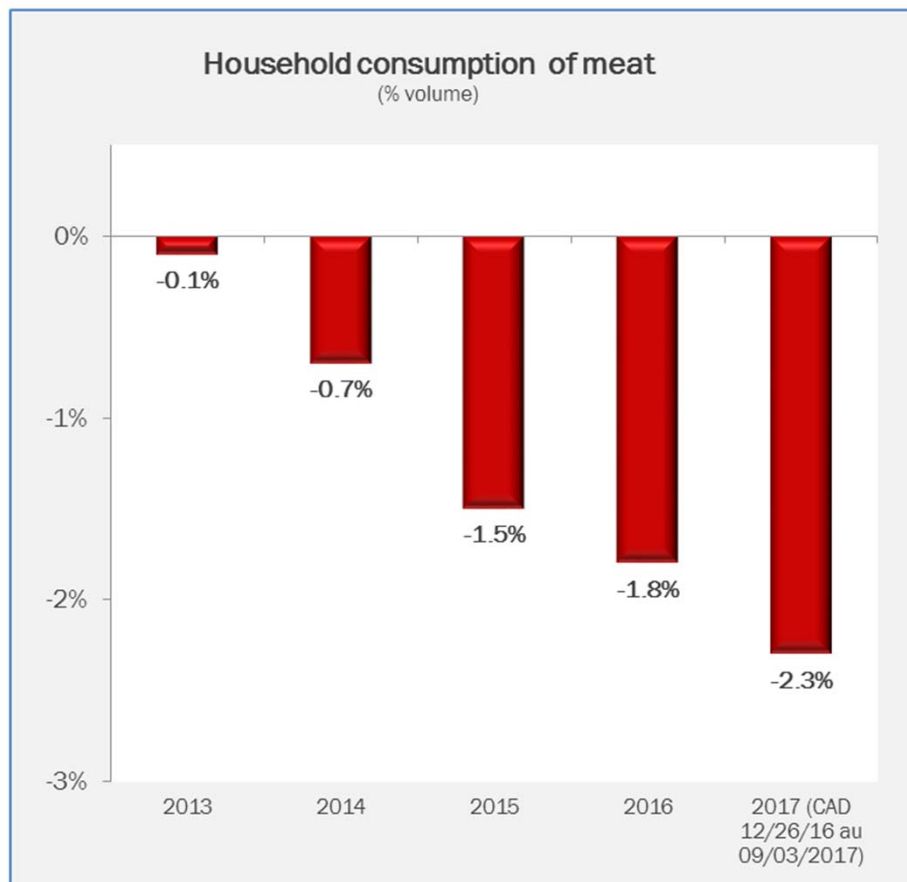
France

Period ending 3 September 2017

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	-2,3%	+0,4%	-1,3%	-0,2%
Fresh beef	-3,9%	+0,5%	-3,0%	-0,1%
Fresh veal	-3,7%	+0,1%	-4,5%	+0,5%
Fresh lamb	-4,5%	+1,1%	-4,3%	+0,5%
Fresh pork	-5,0%	+1,6%	-2,9%	+0,2%
Tripe Products	-5,5%	+0,0%	-3,3%	-0,7%
Poultry	-1,3%	+0,5%	-2,5%	-0,3%
Frozen Meat	-2,2%	-0,2%	-3,3%	+1,4%
Ham and other meats	-2,4%	+2,6%	-1,7%	+2,5%

Source: Kantar Worldpanel

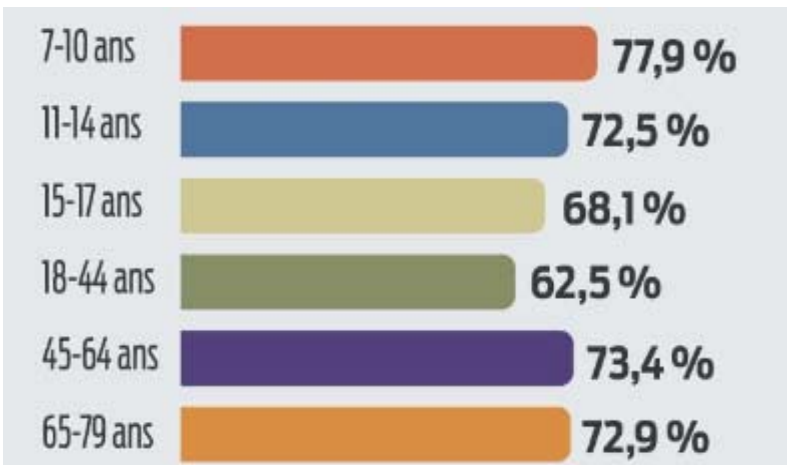
France



Period ending 3 september 2017

Source: Kantar

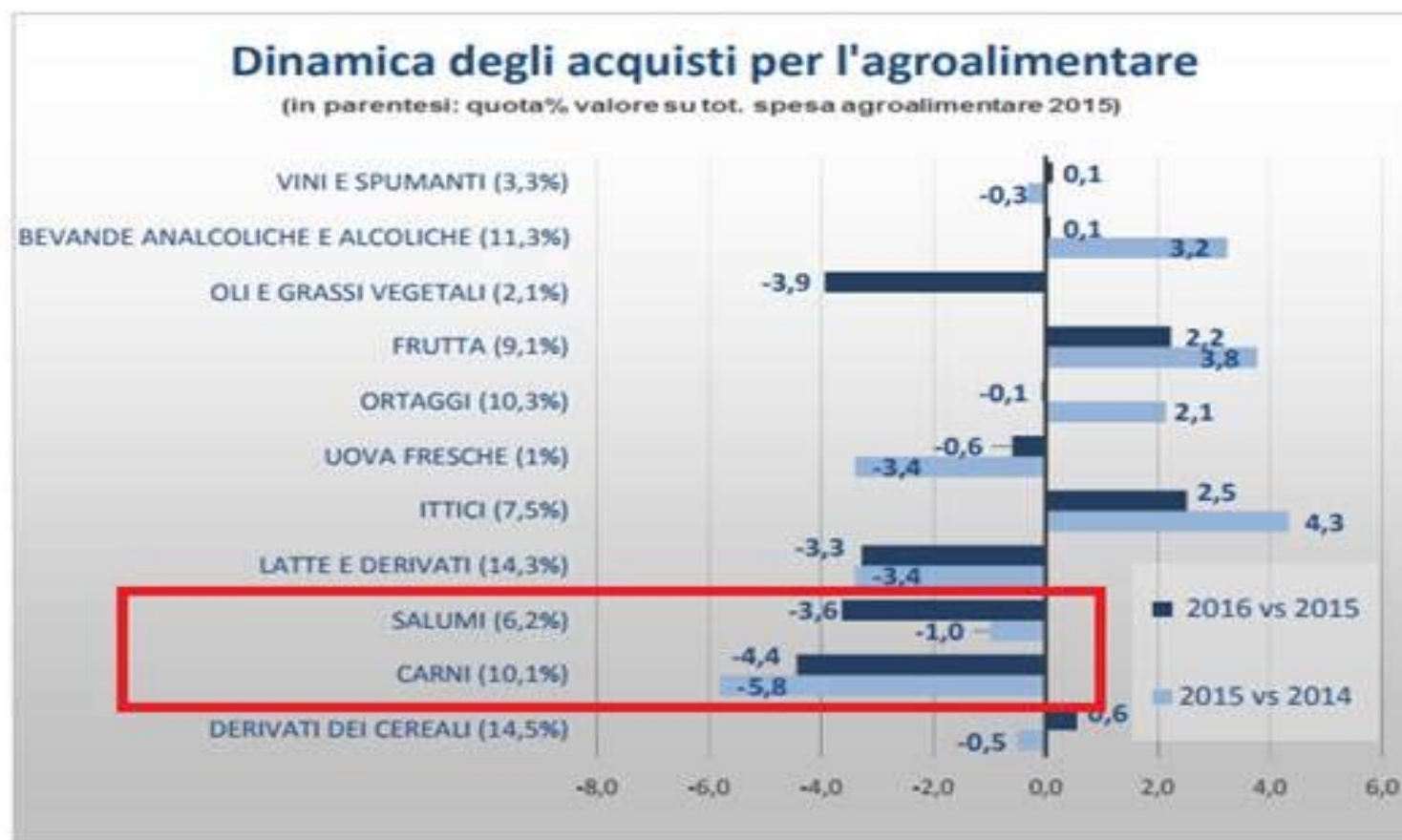
Only **62.5%** of the 18 to 44 years old are consumers of beef, veal and pork meat.



Source: ANSES, INCA 3 / 2014-2015. Part of meat consumers (**except poultry and ham**)

Italy: variation of household purchases of meat

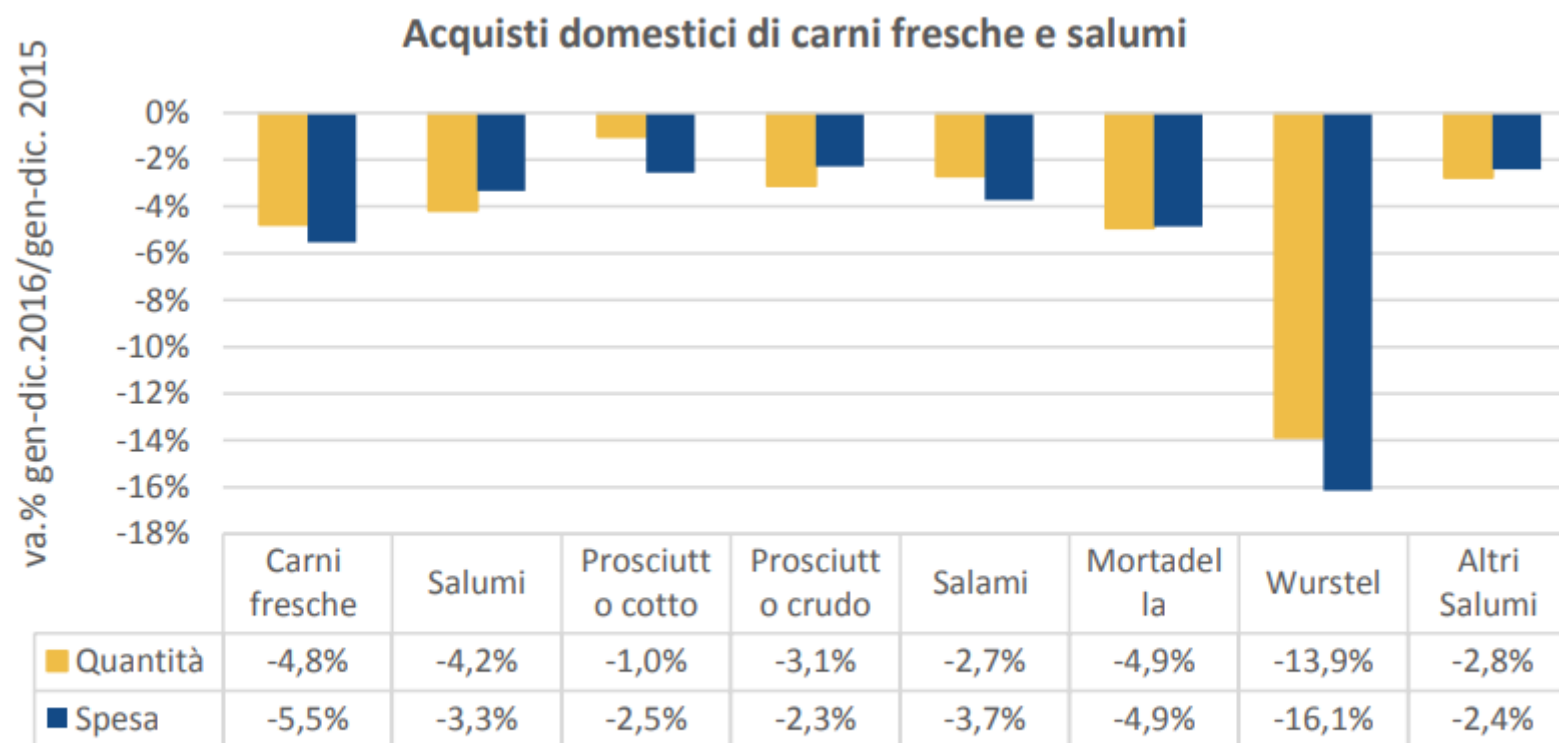
(values, first 9 months of 2016 vs 2015)



Fonte: Ismea-Nielsen

Source: Ismea-Nielsen

Italy: Household purchases of fresh meat



Fonte: Elaborazione su dati ISMEA Nielsen- Consumer Panel Service

Italy: Household purchases of veal

Indicatori	Incidenza	Parametro	Var% 16/15	Var% 16/13
TOTALE ITALIA				
Indice di penetrazione	62%	Acquisti in quantità	-6%	-18%
Acquisto medio per atto (Kg)	0,83 Kg	Acquisti in valore	-6%	-17%
Intervallo medio di acquisto	42 giorni	Famiglie acquirenti	-2%	-8%
		Acquirenti in promozione	-5%	-4%
		N° atti di acquisto	-6%	-17%

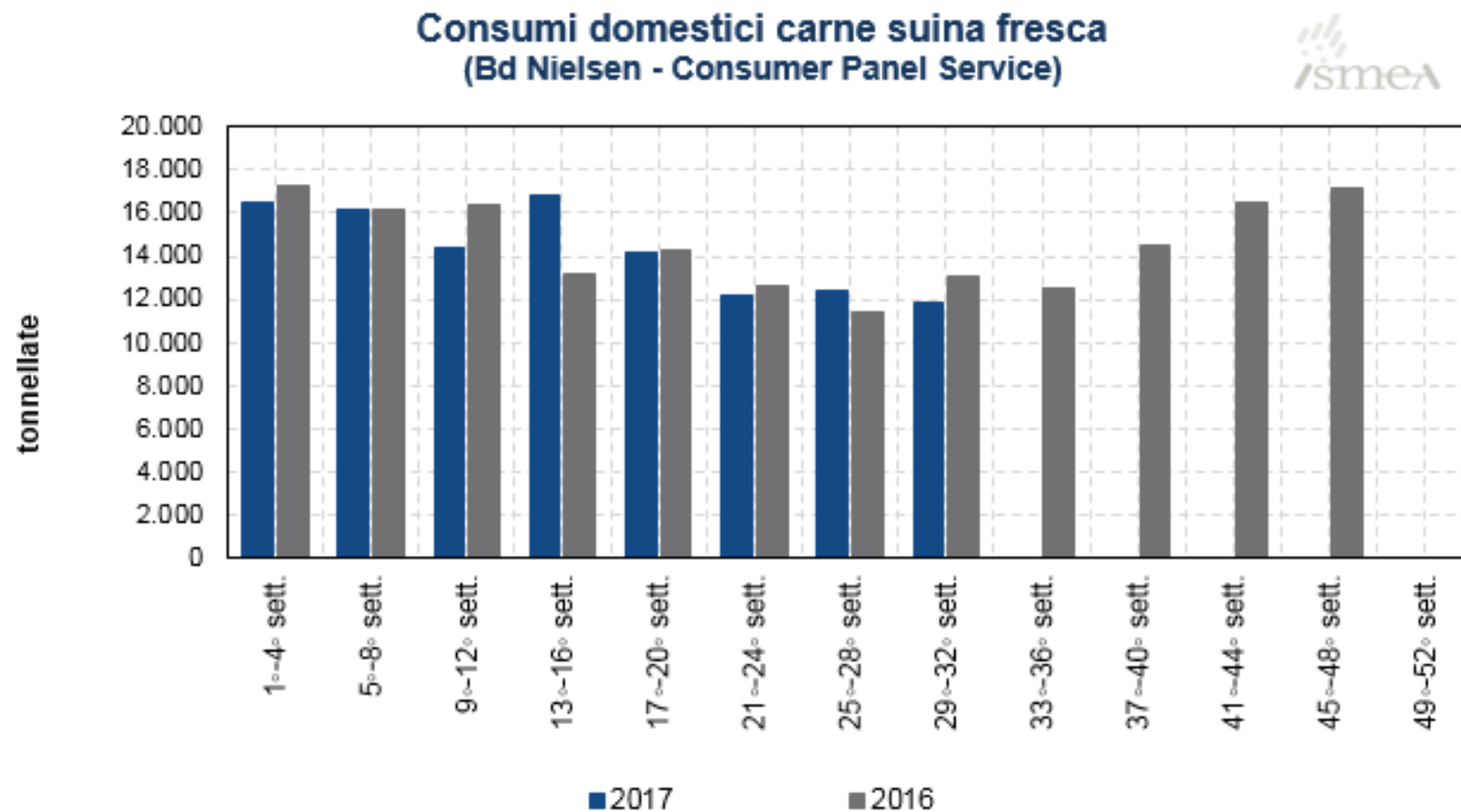
Fonte: Ismea-Nielsen (Consumer Panel)

Italy: variation of veal purchases across retail categories

(volumes, first nine months of 2016 vs 2015)



Italy – pork consumption



Source: Ismea Mercati

Spain

Product category	Volumes (% change Jan.-Jun.17 vs Jan.-Jun.16)	Volumes (% change June 2017 vs. June 2016)	Value (% change Jan.-Jun.17 vs Jan.-Jun.16)	Value (% change June 2017 vs. June 2016)
Total meat	-2.1%	-2.7%	-1.5%	+1.2%
Pork	- 3.8%		-3.9%	
Beef	-4.0%		-3.1%	
Frozen	--8.5%		-14.7%	
Processed (élaborés de viande)	+0.8%		+1.4%	

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

United Kingdom

Trends in retail pig meat purchases

	2012	2013	2014	2015	2016
'000 tonnes					
Fresh and frozen pork	182.2	178.7	177.4	167.8	163.0
Pork belly	21.5	19.5	19.0	17.3	16.9
Pork frying/grilling chops	72.5	71.1	66.9	63.0	61.7
Pork leg roasting joint	23.2	22.6	23.3	20.7	21.9
Pork loin roasting	15.1	15.9	16.0	15.3	14.2
Pork shoulder roasting joint	28.6	26.4	28.0	27.3	25.6
Pork mince	5.6	7.2	8.7	8.4	7.9
Bacon	227.6	218.1	216.5	212.2	212.0
Pork sausages	172.5	165.9	166.5	163.0	162.9

Source: Kantar Worldpanel

United Kingdom: beef

Period ending	13th August 2017		
Fresh & Frozen Beef	4 weeks ended: 13th August 2017	12 weeks ended: 13th August 2017	52 weeks ended: 13th August 2017
Expenditure (£ million)	145,5	435,5	2.189,9
annual change %	+4,4	-0,5	+0,8
Volume (tonnes)	18.487	54.365	282.599
annual change %	+3,1	-3,6	+1,4
Average price (£/kg)	7,87	8,01	7,75
Annual volume change %	4 weeks ended: 13th August 2017	12 weeks ended: 13th August 2017	52 weeks ended: 13th August 2017
Fresh & frozen beef	+3,1	-3,6	+1,4
- Roasting	+8,8	-7,2	-2,6
- Stewing	+9,2	-4,4	+1,9
- Frying/grilling steak	-4,3	-1,2	+6,4
- Mince	+3,6	-4,0	+0,9
- Marinade	+7,0	+7,2	+7,2
Burgers and grills	-21,9	-2,9	-0,7
Chilled ready meals	+7,9	+4,2	+5,4
Frozen ready meals	+20,4	+4,7	-1,1
Fresh pre-packed hot pies	+19,5	+11,5	+5,1
Fresh pre-packed pasties	+37,7	+17,8	+3,8
Frozen pies/puddings	+4,2	-2,4	-2,0

Please note Kantar data may be revised on a monthly basis.

Source: <http://beefandlamb.ahdb.org.uk/markets/industry-reports/uk-statistics/>

United Kingdom: pigmeat

Period ending	13th August 2017		
	4 weeks ended: 13th August 2017	12 weeks ended: 13th August 2017	52 weeks ended: 13th August 2017
Fresh & Frozen Pork			
Expenditure (£ million)	57,7	170,7	732,8
annual change %	+8,8	+3,7	-2,9
Volume (tonnes)	12.110	35.414	160.504
annual change %	+2,0	-4,8	-4,0
Average price (£/kg)	4,76	4,82	4,57
Annual volume change %	4 weeks ended: 13th August 2017	12 weeks ended: 13th August 2017	52 weeks ended: 13th August 2017
Fresh & frozen pork	+2,0	-4,8	-4,0
- Belly	-6,2	-7,2	+1,3
- Chops/Steaks	+3,0	-7,4	-2,1
- Leg Roasting Joint	+10,2	-12,5	-5,3
- Loin Roasting	+2,2	-6,0	-6,9
- Shoulder Roasting Joint	-4,9	-15,1	-18,1
- Marinades	-8,2	+6,6	-11,0
- Pork Ribs	+10,0	+10,8	-3,1
- Mince	+12,9	+26,4	+18,4
Bacon	+6,4	+0,6	+2,3
Pork Sausages	-2,7	-1,7	+1,2
Fresh PP Pork Pies	-5,2	+7,2	-1,2
Fresh PP Sausage Rolls	-12,8	-1,9	-0,6
Pork Sliced Cooked Meats (incl Ham)	-0,1	+3,6	+2,1
Ready Meals (chilled)	+10,9	+1,2	+2,3

Please note Kantar data may be revised on a monthly basis.