



TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

Meat Market Observatory
2 October 2018

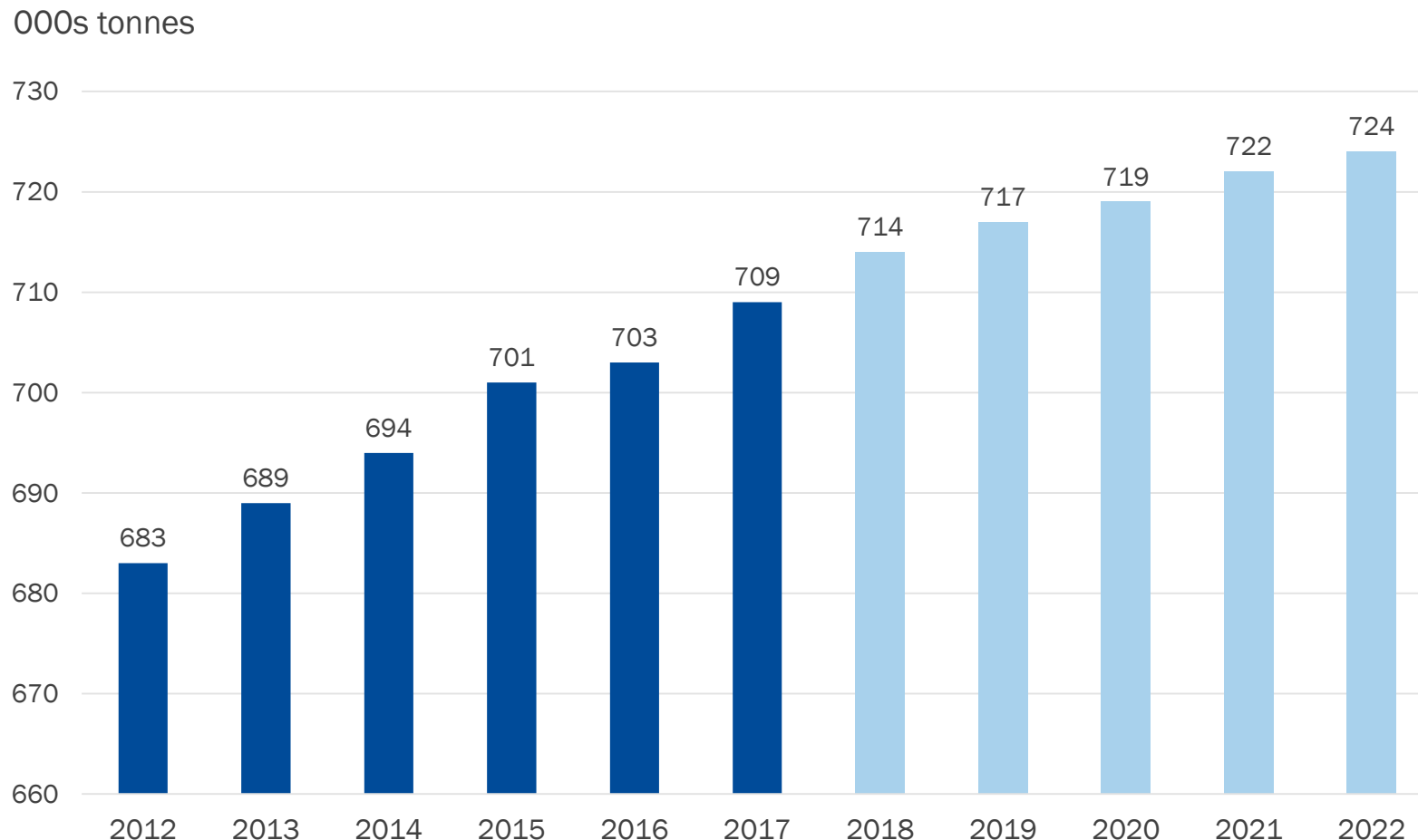
Belgium

Period ending: 15 September 2018

Product category	Price evolution (% change Sept-18 vs Sept- 17)	Price evolution (% change Jan-sept 2018 vs Jan-sept 2017)
Total pigmeat	0.4%	0.2%
Delicatessen (salami, ham, prosciutto, etc)	0.6%	2.1%
Processed pork (<i>élaborés de viande</i>)	1.9%	2.0%
Total beef and veal	0.6%	0.4%

Source: COMEOS

Belgium: overall meat consumption, annual data (2018 – 2022: forecast)



Source: Euromonitor

France

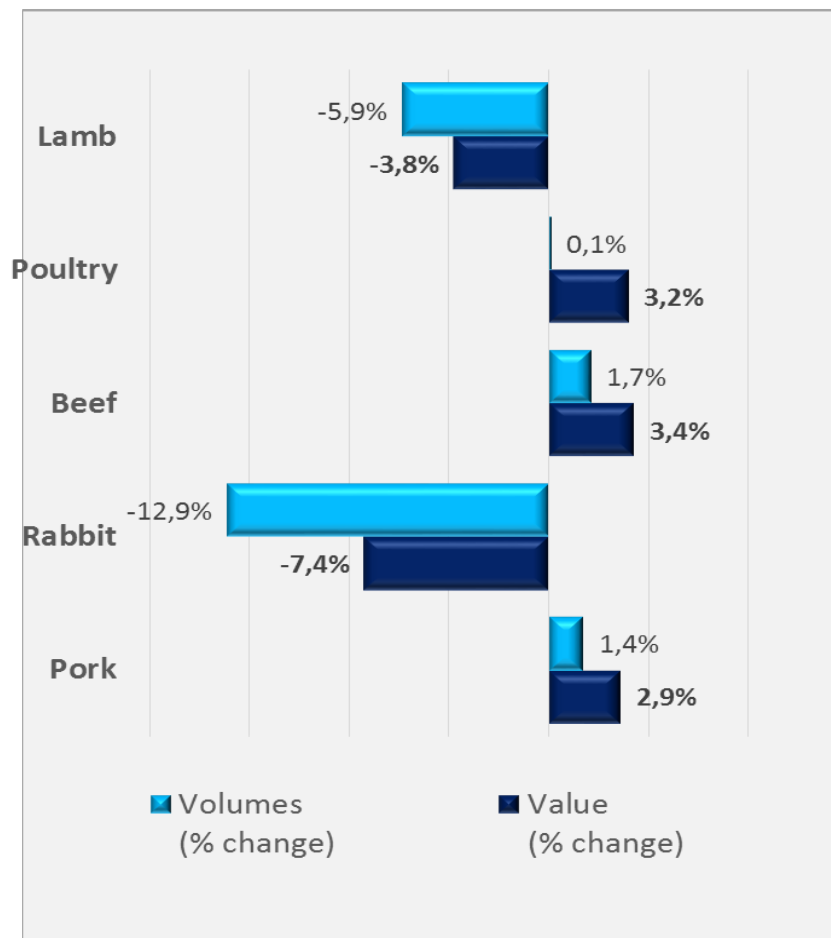
Period ending 9 September 2018

Product category	volumes (% change year-to-date)	price (% change year-to-date)	volumes (% change Year-on-year) (52 weeks)	price (% change Year-on-year) (52 weeks)
Fresh meat	-3.1	0.3	-3.1	0.4
Fresh beef	-4.7	0.3	-3.2	0.2
Fresh veal	-6.7	-0.6	-5.2	-1.1
Fresh lamb	-5.7	-0.1	-5.3	0.1
Fresh pork	-4.1	0.1	-4.3	0.5
Poultry	-0.3	0.7	1.0	1.0
Frozen Meat	-1.0	0.8	0.4	0.6
Ham and other meats	-1.8	2.2	-0.6	2.3

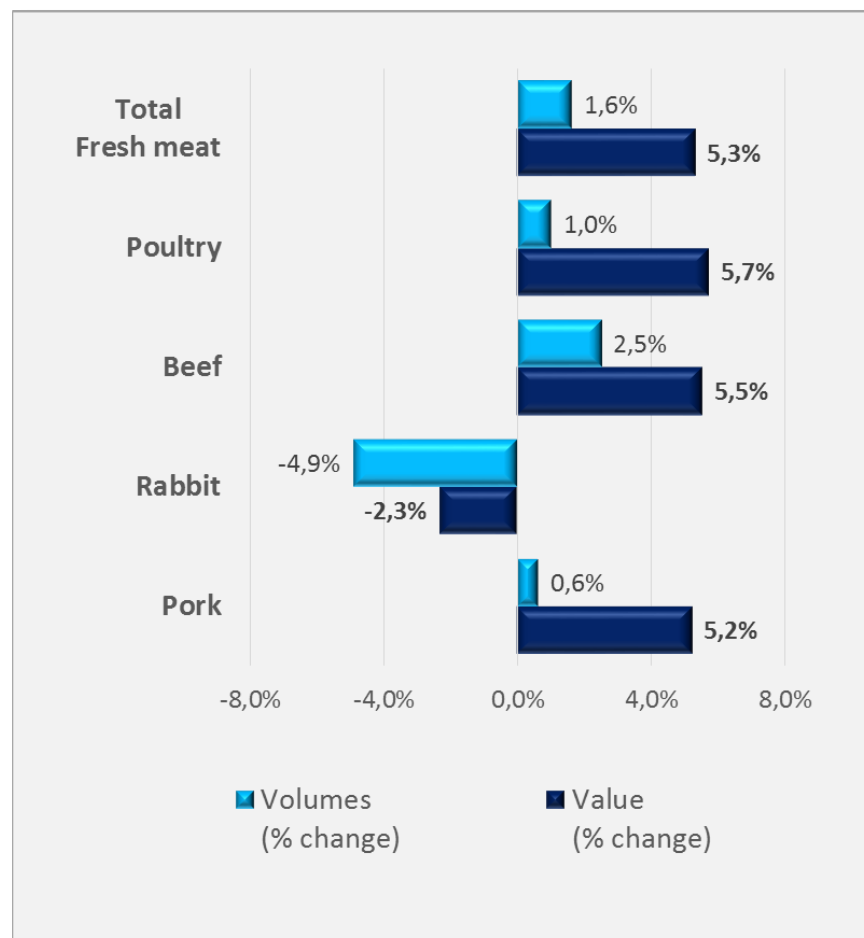
Source: Kantar Worldpanel

Italy: Household Purchases of meat

% CHANGE
2016/2017



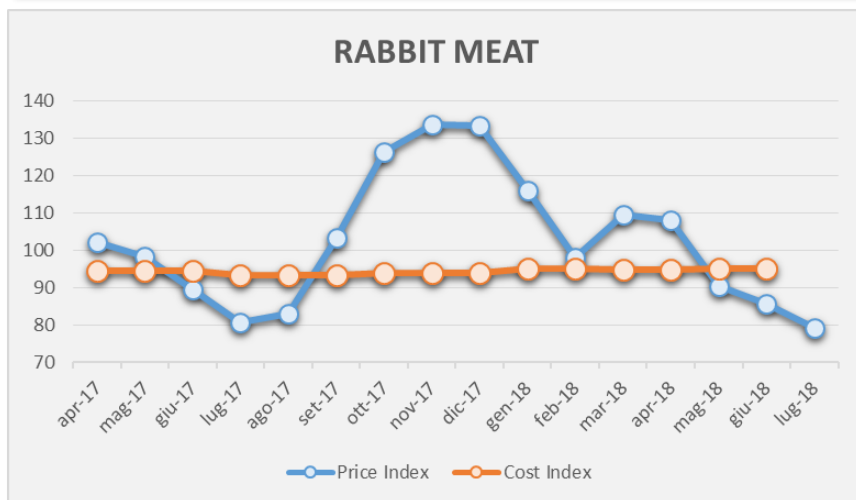
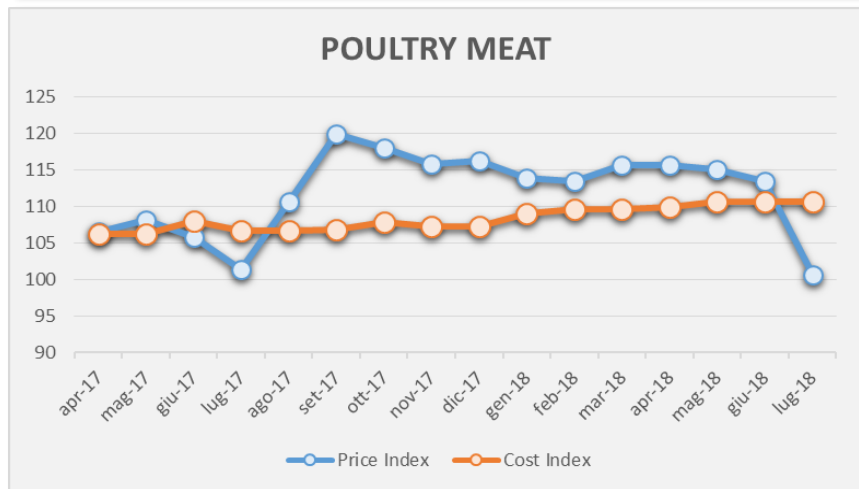
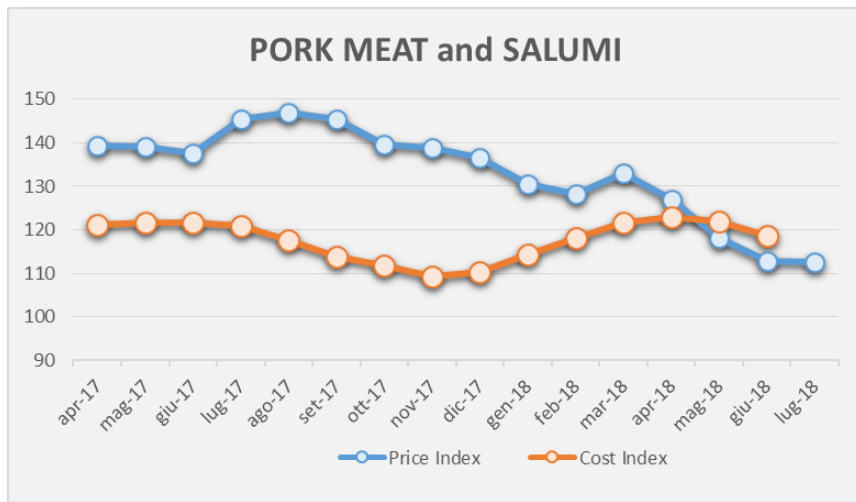
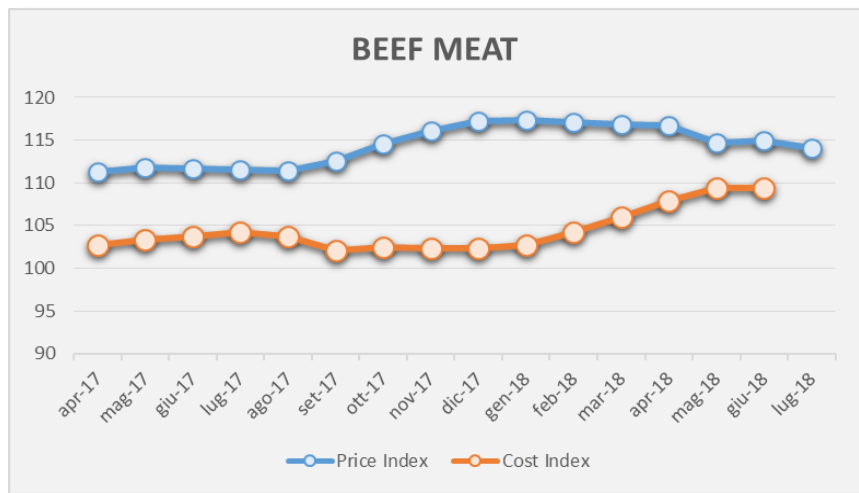
% CHANGE
YTD MARCH18 VS YTD MARCH17



Source: Ismea estimates based on Nielsen data

Italy: Household Purchases of meat

PRICE AND COST INDICES (BASE 2010=100), APR.17 – JUL.18



Source: Ismea estimates based on Nielsen data

Italy: Household consumption of meat

FRESH BEEF

	2017	% Change 2016/2017	% Change 2013/2016
Penetration index * 61%	Purchases (<i>Volumes</i>)	+1.7%	-18%
	Purchases (<i>Value</i>)	+3.4%	-17%
	Purchases with sales promotion	+2.2%	-4%
	Number of purchases (52 weeks)	+2%	-17%

*= Defined as the ratio of the number of households who have purchased fresh beef at least once over the period to the total number of households in the panel

Source: Ismea estimates based on Nielsen data

Spain

Annual data

- **Fresh meat sales (63% of the market) increased by 4% year-on-year in 2017**
- **Charcuterie (36% of the market) by 3.5%**
- **Ready meals (1.8% of the market) by 10.7%**
- **Total meat consumption has provided a contribution to the overall growth of food products of 20%**

Source: Nielsen Market Track

Spain

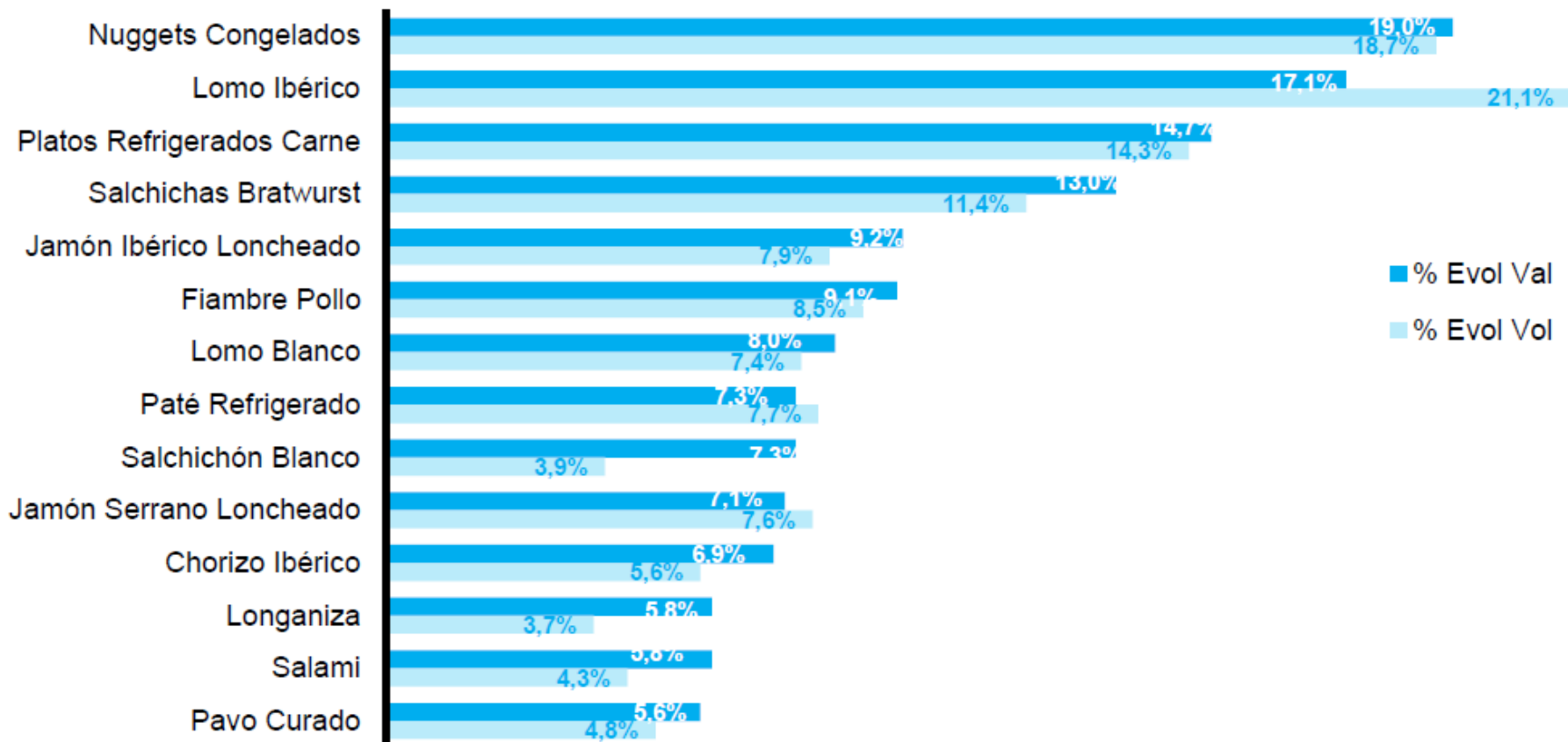
Annual data 2017

		VALOR	VOLUMEN	PRECIO CESTA
TOTAL FRESCOS		+3,5%	+0,6%	+2,8%
	CARNE	+3,9%	+0,4%	+3,5%
	FRUTA	+5,2%	+1,1%	+4,1%
	VERDURAS	+6,3%	+1,9%	+4,3%
	PESCADO	+0,1%	-5,4%	+5,8%
	PAN	+0,4%	-1,3%	+1,7%
	HUEVOS	+5,0%	+4,2%	+0,7%

Source: Nielsen Market Track

Spain

Annual data 2017



Source: Nielsen Market Track

United Kingdom: beef

Period ending 12 August

Period ending	12th August 2018			
		4 weeks ended:	12 weeks ended:	52 weeks ended:
Fresh & Frozen Beef		12th August 2018	12th August 2018	12th August 2018
Expenditure (£ million)		142.0	424.9	2,215.0
annual change %		-4.0	-4.0	-0.3
Volume (tonnes)		17,523	53,146	281,688
annual change %		-8.1	-4.7	-1.9
Average price (£/kg)		8.10	7.99	7.86
Penetration (%)		50.0	68.6	86.7
Annual volume change %		4 weeks ended:	12 weeks ended:	52 weeks ended:
		12th August 2018	12th August 2018	12th August 2018
Fresh & frozen beef		-8.1	-4.7	-1.9
- Roasting		-31.3	-27.0	-12.3
- Stewing		-27.7	-22.6	-5.0
- Frying/grilling steak		+16.7	+13.8	+4.8
- Mince		-9.4	-4.1	-0.6
- Marinade		+41.1	+21.3	+18.4
Burgers and grills		+21.6	+14.7	+7.4
Chilled ready meals		-3.0	+1.8	+1.0
Frozen ready meals		-8.0	-2.9	+5.0
Fresh pre-packed hot pies		-14.6	-18.7	-5.3
Fresh pre-packed pasties		-15.5	-6.5	+0.2
Frozen pies/puddings		-18.6	-13.2	-3.9

United Kingdom: pork

Period ending 12 August

Period ending 12th August 2018

Fresh & Frozen Pork

	4 weeks ended: 12th August 2018	12 weeks ended: 12th August 2018	52 weeks ended: 12th August 2018
Expenditure (£ million)	51.4	162.0	745.1
annual change %	-10.0	-4.1	+2.1
Volume (tonnes)	10,869	33,904	157,344
annual change %	-9.2	-3.0	-1.5
Average price (£/kg)	4.72	4.78	4.74
Penetration (%)	29.8	48.5	71.1

Annual volume change %

	4 weeks ended: 12th August 2018	12 weeks ended: 12th August 2018	52 weeks ended: 12th August 2018
Fresh & frozen pork	-9.2	-3.0	-1.5
- Belly	-6.2	+1.9	-14.2
- Chops/Steaks	-12.1	-3.4	+0.0
- Leg Roasting Joint	-10.7	-3.7	+14.5
- Loin Roasting	-44.1	-46.1	-24.7
- Shoulder Roasting Joint	-0.5	+4.6	-8.6
- Marinades	+17.9	+16.5	+7.9
- Pork Ribs	-3.0	+2.5	+6.9
- Mince	+0.2	+1.4	+16.7
Bacon	-3.5	+0.0	+1.1
Pork Sausages	+4.2	+3.0	+1.8
Fresh PP Pork Pies	+18.2	+5.6	+5.5
Fresh PP Sausage Rolls	+0.3	-0.9	-4.4
Pork Sliced Cooked Meats (incl Ham)	+2.0	+0.7	+0.4
Ready Meals (chilled)	+4.2	+6.0	+5.6