

MARKET INNOVATION OVERVIEW

CATEGORY: Meat & Meat Products | **COUNTRY:** Spain

Este documento foi elaborado no âmbito do projeto PortugalFoods Qualifica, com o objetivo de criar informação de alto valor acrescentado para as PME e restantes entidades do setor agroalimentar nacional, para que estas se possam posicionar estrategicamente no contexto do mercado global.

A informação contida neste documento provém do Observatório da PortugalFoods que, com recurso à plataforma Mintel, permite contribuir para a qualificação e sensibilização do setor agroalimentar, tanto ao nível do conhecimento sobre novos produtos e técnicas de produção, como ao nível do acompanhamento da evolução tecnológica e da evolução das preferências do consumidor.

A Mintel cataloga mais de 38 000 novos lançamentos de produto por mês, provenientes dos 86 mercados que monitoriza, analisando e categorizando todos os seus atributos, tais como os ingredientes, posicionamento e comunicação ao consumidor.

O Observatório da PortugalFoods constitui-se assim como uma ferramenta de grande importância para alicerçar o conhecimento das empresas do Setor Agroalimentar.



A REGIONAL INTRODUCTION:

MEAT & MEAT PRODUCTS IN EUROPE, MIDDLE EAST AND AFRICA

Ethics and supply chain transparency: Being transparent around sourcing and supply chain of meat and poultry will be key to build trust with consumers. Producers will need to raise their standards in terms of animal welfare to capture the attention of concerned consumers. For Europeans, high animal welfare claims are among the most important qualities when purchasing meat products. Consumers' distrust has increased the need for food and drink manufacturers to be forthcoming about their ingredients, production processes and supply chains. This is evident in the processed meat and poultry, with brands providing detailed levels of transparency on areas such as sourcing, place of origin and production processes, front and centre of innovation.

Promote ethical and environmental activities: Creative marketing is a great way to promote ethical and environmental activities. Such innovative campaigns can be used to encourage transparency between producers and consumers.



MEAT PRODUCTS IN SPAIN

Market Overview

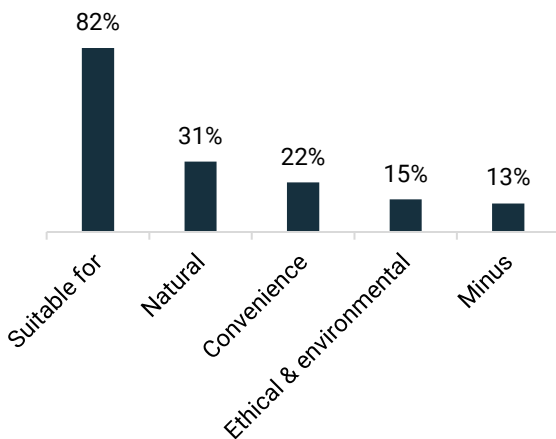
The Spanish meat sector is expected to grow from €19.7 billion in 2018 to €23.3 billion by 2023, at a CAGR of 3.1%. In volume terms, the sector is expected to grow from 2.52 billion kg in 2018 to 2.55 billion kg by 2023, registering a CAGR of 0.2%.

Per capita consumption of meat in Spain stood at 54.0kg in 2018 and is expected to grow and reach 54.9kg by 2023. Per capita expenditure in Spain stood at €423 in 2018 and is expected to reach €498 by 2023. (GlobalData, 2020)

New Product Development Analysis

3.5% of food products launched in Spain between July 2018 and June 2019 were Meat Products.

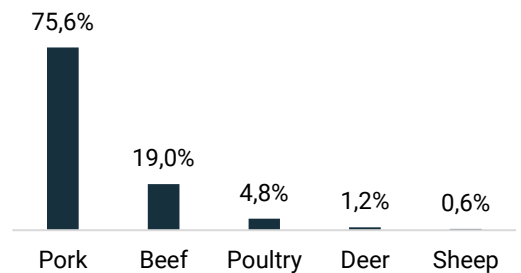
Top 5 Category of Claims in Meat Product Launches



The 'Suitable for' claim category was used to a great extent, particularly the 'Gluten-Free', which was featured in 82% of new product launches. The 'Natural' claim category was majorly represented by the 'No Additives/Preservatives', while the 'Convenient Packaging' claim was responsible for the 'Convenience' claim category's 3rd place in the Top 5.

The Meat Products' sector in Spain has been dominated by 'Pork' meat, with three quarter of products launched from July 2018 to June 2019 featuring this ingredient. 'Beef' was present in about a fifth of new product launches, while 'Poultry' saw a share of only 5% of products.

Selected Ingredients in Meat Product Launches



These BBQ Sausages are a cooked product based on pork, turkey and chicken, feature a smoked flavour, and are free from gluten, colourings and starch.



This beef product can be cooked in five minutes, does not require defrosting, and is free from gluten, lactose, artificial colors, and preservatives. It is high protein, features a reduced fat content, and no added salt.

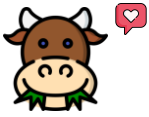


This natural and highest quality product is rich in protein and low in fats, as well as free from gluten, lactose, soy, and mustard.



THE SPANISH CONSUMER

Important qualities when purchasing meat (2018)



74%

Animal welfare



66%

Handmade/handcrafted

Attitudes toward meat (2018)

It is important to have detailed information about where their products come from



64%

Frequency of eating processed meat/poultry (2018)



(GlobalData, 2020)

A GLOBAL LOOK INTO THE FUTURE

Meat alternatives and reduced-meat options: These options will give vegan/vegetarians and experimenting flexitarians new "meat" options, creating potential challenges for the industry;

Ethical and sustainability: Producers will be challenged to expand what it means to raise animals humanely and terms such as "barn-free" and "slow growth" will become more common. Consumers care about what goes into their food, and antibiotics and hormone avoidance has become an emerging free-from claim. Some consumers are limiting their meat consumption out of concern for the environment, making it more important for companies to communicate their sustainability efforts.

Lab-grown meat: This trend will be especially tempting to consumers who seek ways to eat more sustainably. This method can provide meat without requiring the environmental resources typically associated with raising animals as well as preventing the release of CO₂. In Europe, most consumers are not ready to find lab-grown meat on their plates, however, younger consumers across Europe are much more open to this.

Para mais informações acerca do Observatório da PortugalFoods, por favor contactar knowledge.division@portugalfoods.org

