

## MARKET INNOVATION OVERVIEW

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

*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 GERMANY

### Market Overview

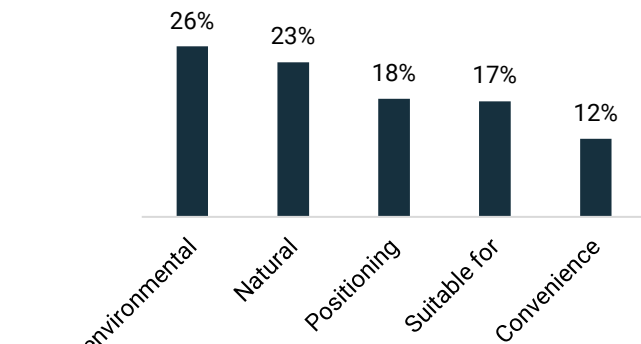
The German meat sector is expected to decrease from €50.7 billion in 2018 to €50.4 billion by 2023, at a CAGR of -0.1%. In volume terms, the sector is expected to decrease from 3.05 billion kg in 2018 to 2.82 billion kg by 2023, registering a CAGR of -1.6%.

Per capita consumption of meat in Germany stood at 36.6kg in 2018 and is expected to decrease to 33.7kg by 2023. Per capita expenditure in Germany stood at €607.9 in 2018 and is expected to decrease to €602.4 by 2023. (GlobalData, 2020)

### New Product Development Analysis

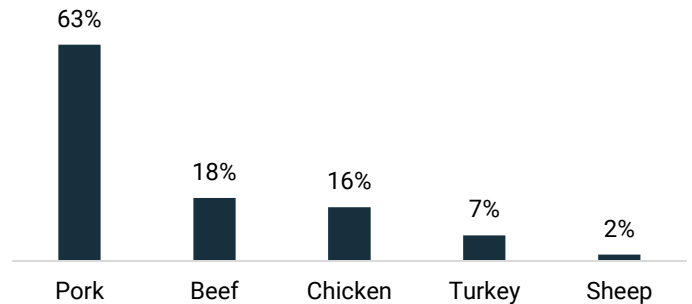
**6%** of food products launched in Germany in 2019 were Meat Products.

Top 5 Claim Categories in Meat Products launches, 2019



More than a quarter of the meat products launched in Germany in 2019 featured a 'Ethical & environmental' claim, with the 'Ethical – Charity' being the most used. The 'Natural' category was in 2<sup>nd</sup> place, mainly due to the 'No Additives/Preservatives' claim. In the 'Positioning' claim category, it was the 'Premium' claim that stood out.

Top 5 Selected Ingredients in Meat Products launches, 2019



More than half of the meat products launched contained 'Pork', with 'Beef' being present in less than a fifth of new product launches. 'Chicken' meat was not far behind, featuring in 16% of new product launches.



These pork meatballs features the Initiative Tierwohl (Animal Welfare Initiative) logo.



This ready to serve, microwaveable and juicy product does not contain added flavour enhancers.



This premium product is halal certified and comprises ready roasted and cut tender chicken meat.



## THE GERMAN CONSUMER

### Important qualities when purchasing meat (2018)

No additives/preservatives



**72%**

**61%**

It is worth paying more for **humanely raised meat** (eg no antibiotics, no hormones) (2018)



High animal welfare



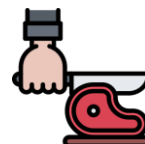
**73%**

**55%**

Of German adults aged 16-24 buy **organic food** and drinks because they are **better for the environment** than conventional products (2018)



Easy to prepare



**67%**

**18%**

Percentage of consumers who agree **"low in salt"** is an important factor when looking for healthy food (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 CO<sub>2</sub>. 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](mailto:knowledge.division@portugalfoods.org)*

