

# MARKET INNOVATION OVERVIEW

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

*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.*

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## 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 BELGIUM

### Market Overview

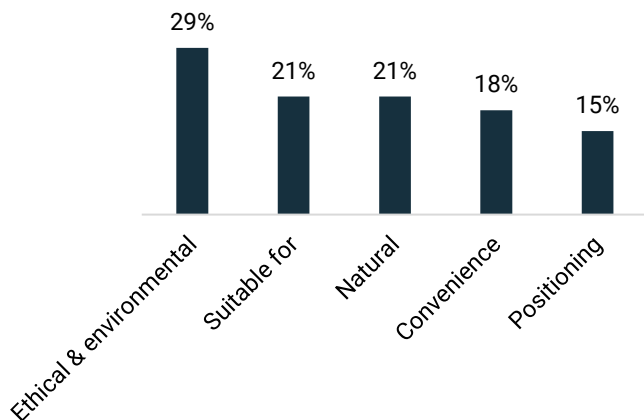
The Belgian meat sector is expected to decrease from €4.72 billion in 2019 to €4.27 billion by 2024, at a CAGR of -2.0%. In volume terms, the sector is expected to decline from 435.6 million kg in 2019 to 389.5 million kg by 2024, registering a CAGR of -2.2%.

Per capita consumption of meat in Belgium stood at 37.8kg in 2019 and is expected to decline to 33.0kg by 2024. Per capita expenditure in Belgium stood at €409.3 in 2019 and is expected to decrease to €362.1 by 2024. (GlobalData, 2020)

### New Product Development Analysis

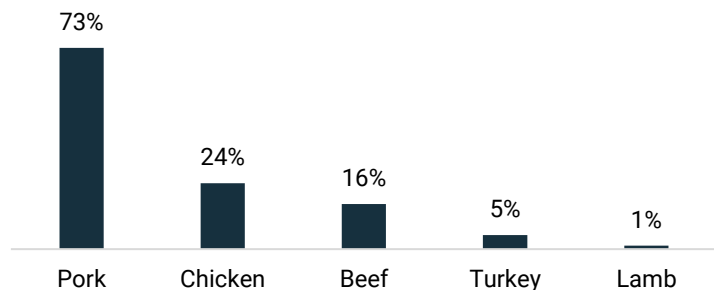
**6%** of food products launched in Belgium between July 2019 and June 2020 were Meat products.

Top 5 Claim Categories in Meat product launches, Jul2019-Jun2020



In the 12 months period between July 2019 and June 2020, a quarter of the meat products launched in Belgium's retail market featured the 'Recycling' claim, from the 'Ethical & environmental' category. The 'Suitable for' category was pushed by the 'Gluten Free' claim, at the same rate that the 'Organic' claim did for the 'Natural' category.

Top 5 Selected Ingredients in Meat product launches, Jul2019-Jun2020



The vast majority of meat products launched in this time featured 'Pork' in their list of ingredients. 'Chicken' was featured in almost a quarter of products, with 'Beef' accounting for a share of 16%.



This product is made with pork, pickles and onions, and retails in a 100% recyclable pack.



This gluten free product is made from race chicken with more space to roam.

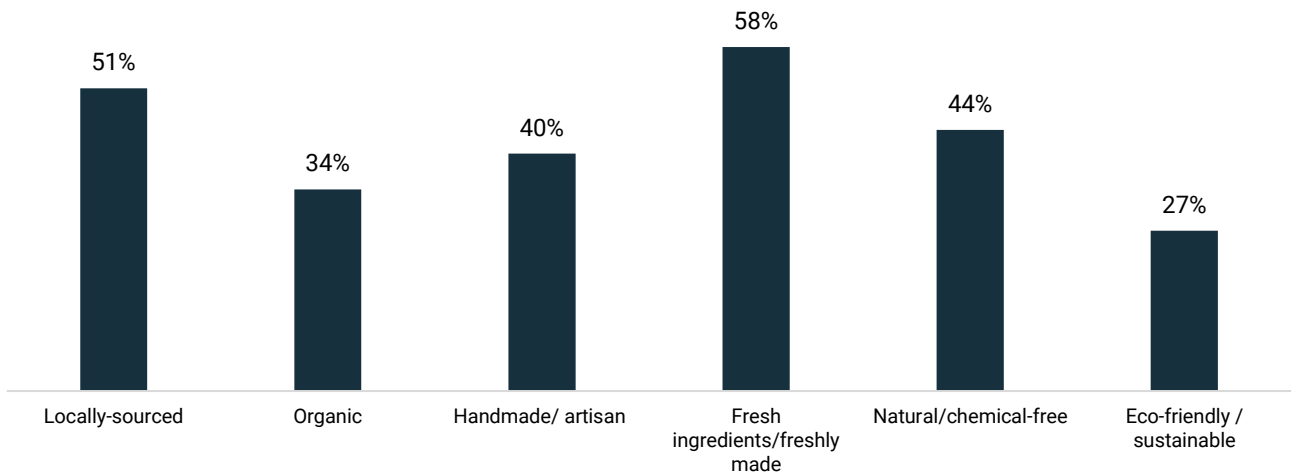


This product features pork and beef, and retails in a 100g pack bearing the EU Green Leaf logo.



## THE BELGIAN CONSUMER

For food/drink products: what does "high quality" mean to you? (2018)



Which of the following are most influential when deciding WHERE to do your grocery shopping? (2018)



(GlobalData, 2020)

## A GLOBAL LOOK INTO THE FUTURE

**Transparency:** Consumers are continually looking for more information about all parts of the products they buy. This places pressure on manufacturers to offer thorough and honest disclosures about how, where, when, and by whom food is grown, harvested, made, and/ or sold.

**Rethink plastic:** A seismic shift in how consumers think about plastic is underway as they become more aware of the damage plastic waste does to the planet. Biobased packaging materials will be key components to the next generation of responsible packaging.

**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.

*Para mais informações acerca do Observatório da PortugalFoods, por favor contactar [knowledge.division@portugalfoods.org](mailto:knowledge.division@portugalfoods.org)*

