

An aerial night view of a city, likely Shanghai, with a dense grid of buildings and streets illuminated. Overlaid on the city are several glowing white arcs and dots, resembling a network or data visualization. The sky is dark blue with some clouds and a few bright stars or lights.

Traditional Products – Innovation Landscape Meat Products

Methodology

ANALYSIS & PARAMETERS

- Analysis is performed based on new product launches tracked on the Innova Database.
- Geography: Europe.
- Time Frame: 2014 – 2018.
- Category: Meat, Fish & Eggs
 - Subcategories: Meat Products
- Positioning: free text search for products with “Protected designation of origin”, “Protected geographical indication”, “Traditional specialties guaranteed”, “Product of Canary Islands”, “Mountain Product” and “Product of Island Farming”.

ABBREVIATIONS AND NOTES

- CAGR = Compound Annual Growth Rate
- F&B = Food & Beverage
- NPL = New Product Launches
- PDO = Protected designation of origin
- PGI = Protected geographical indication
- TSG = Traditional specialties guaranteed
- Number of respondents of Consumer Survey: **500 per analyzed country.**
- Traditional/origin seal = products with PGI, PDO, TSG, Mountain Product, Product of Canary Islands and Product of Island Farming seal.
- Traditional positioning = products with “traditional” positioning at Innova Database.

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Overview of Trends in Meat Products - Europe



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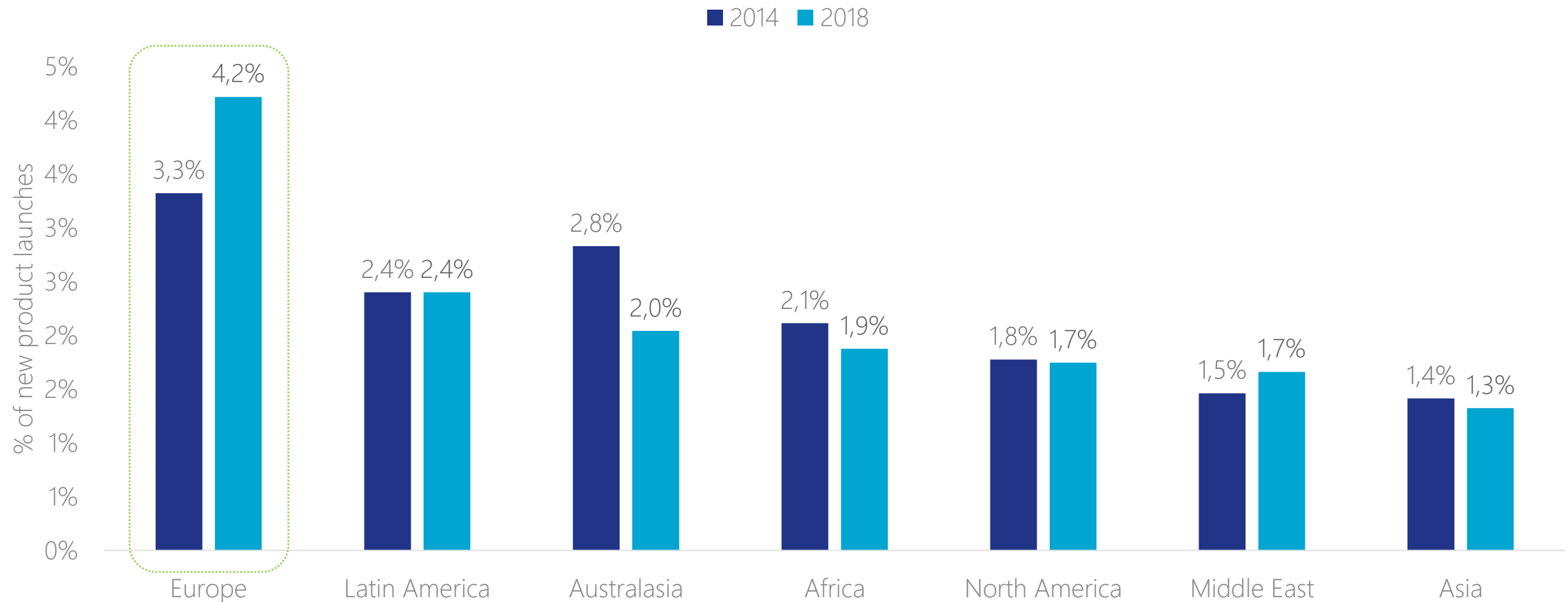


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Meat products presence has increased mostly in Europe

- With 4.2% of new product launches, Europe is the region with highest activity of meat products and also the region with biggest growth in the last five years.

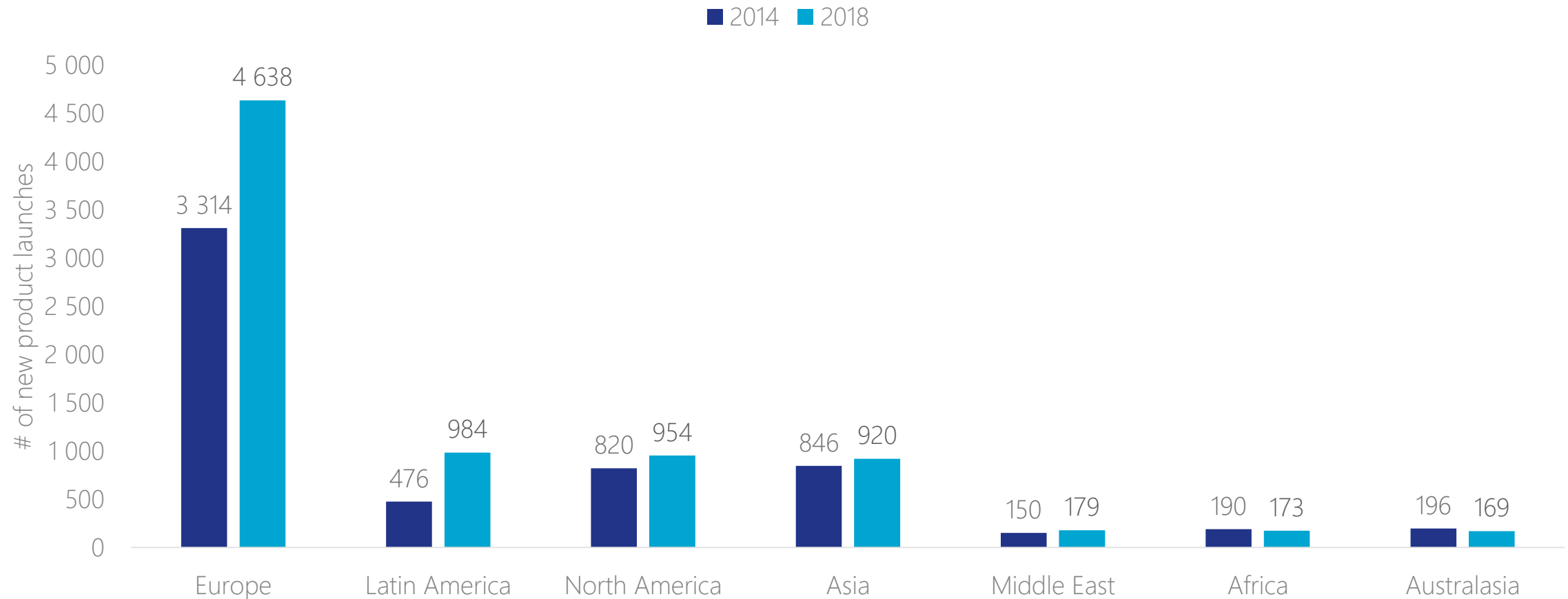
Meat products as percentage (%) of F&B new product launches tracked per region (2018 vs. 2014)



Europe leads meat products new products launches

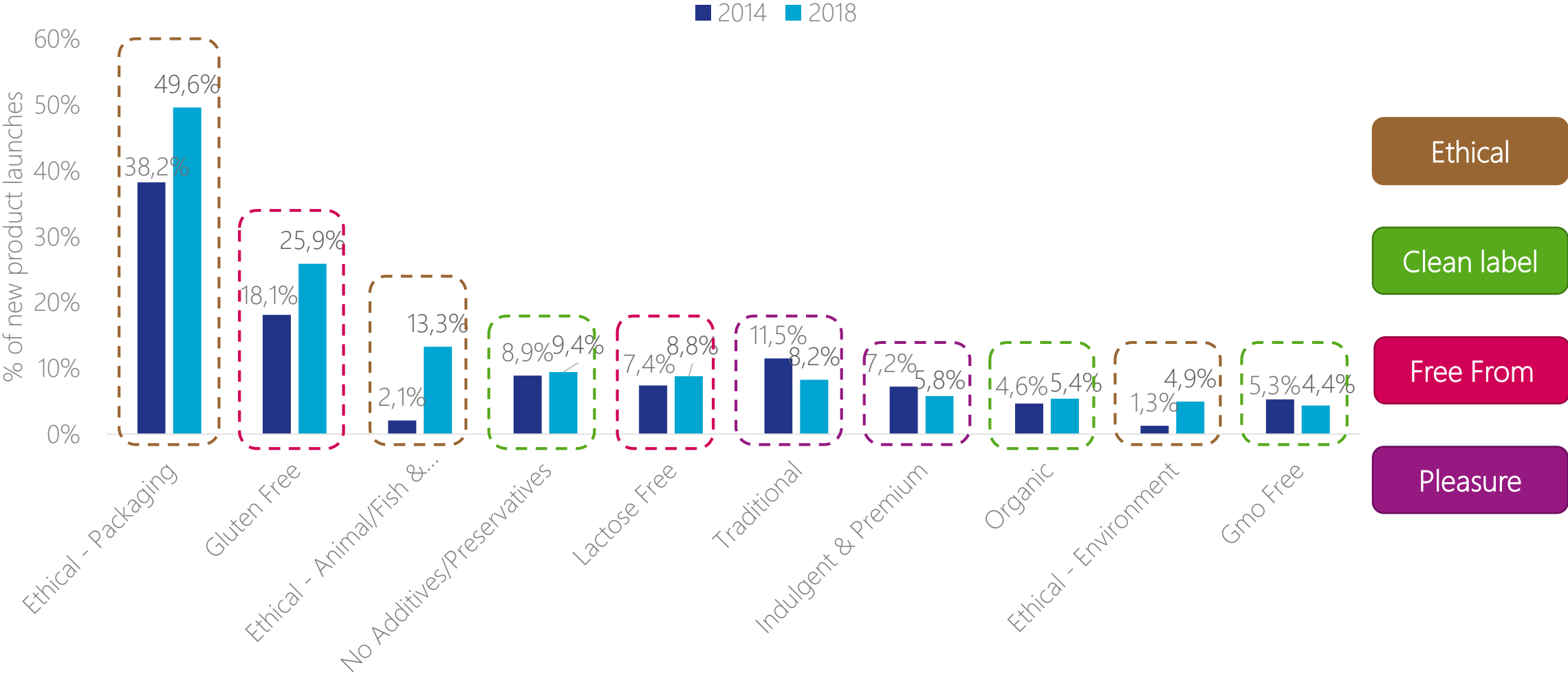
- Latin America is the second biggest market followed by North America.

Number of meat products new product launches tracked per region (2018 vs. 2014)



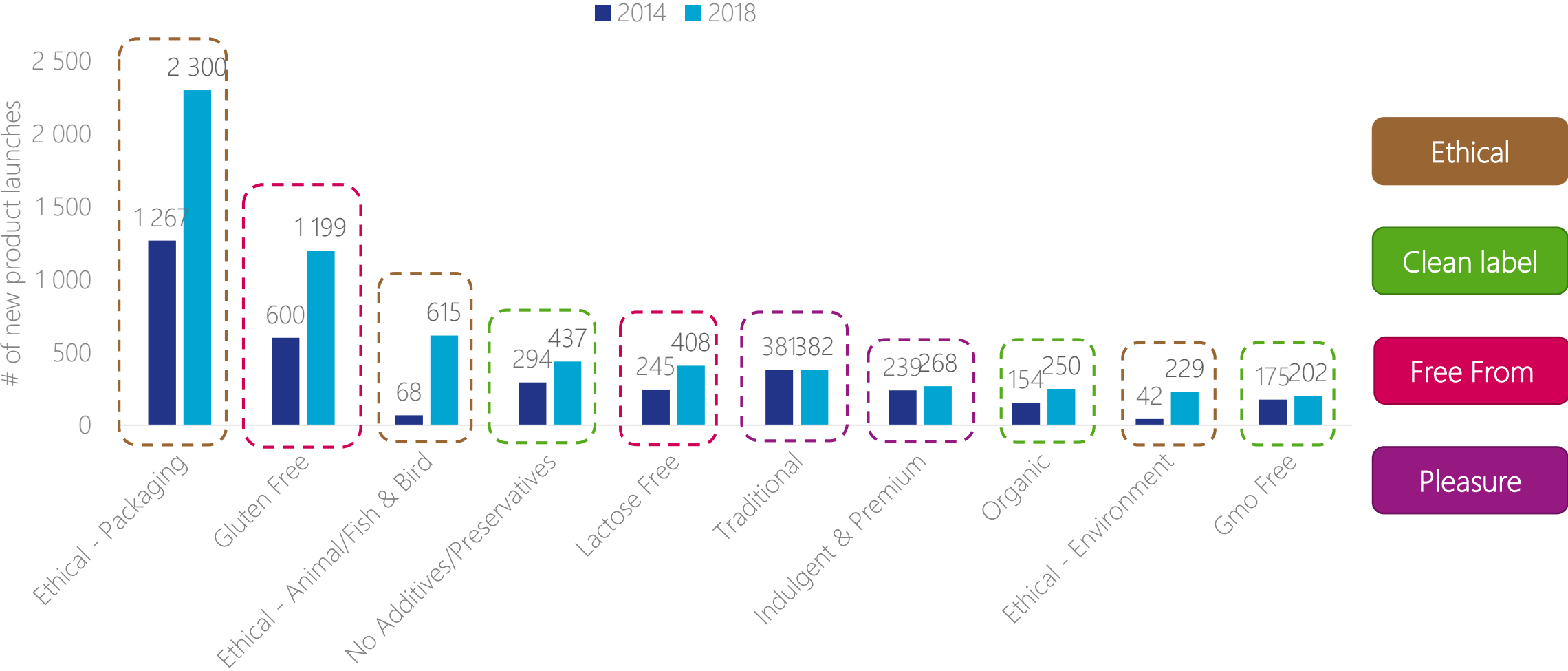
Ethics, free from, clean label and pleasure lead in meat positionings in Europe

Top positionings as percentage (%) of new meat products product launches tracked (Europe, 2018 vs. 2014)



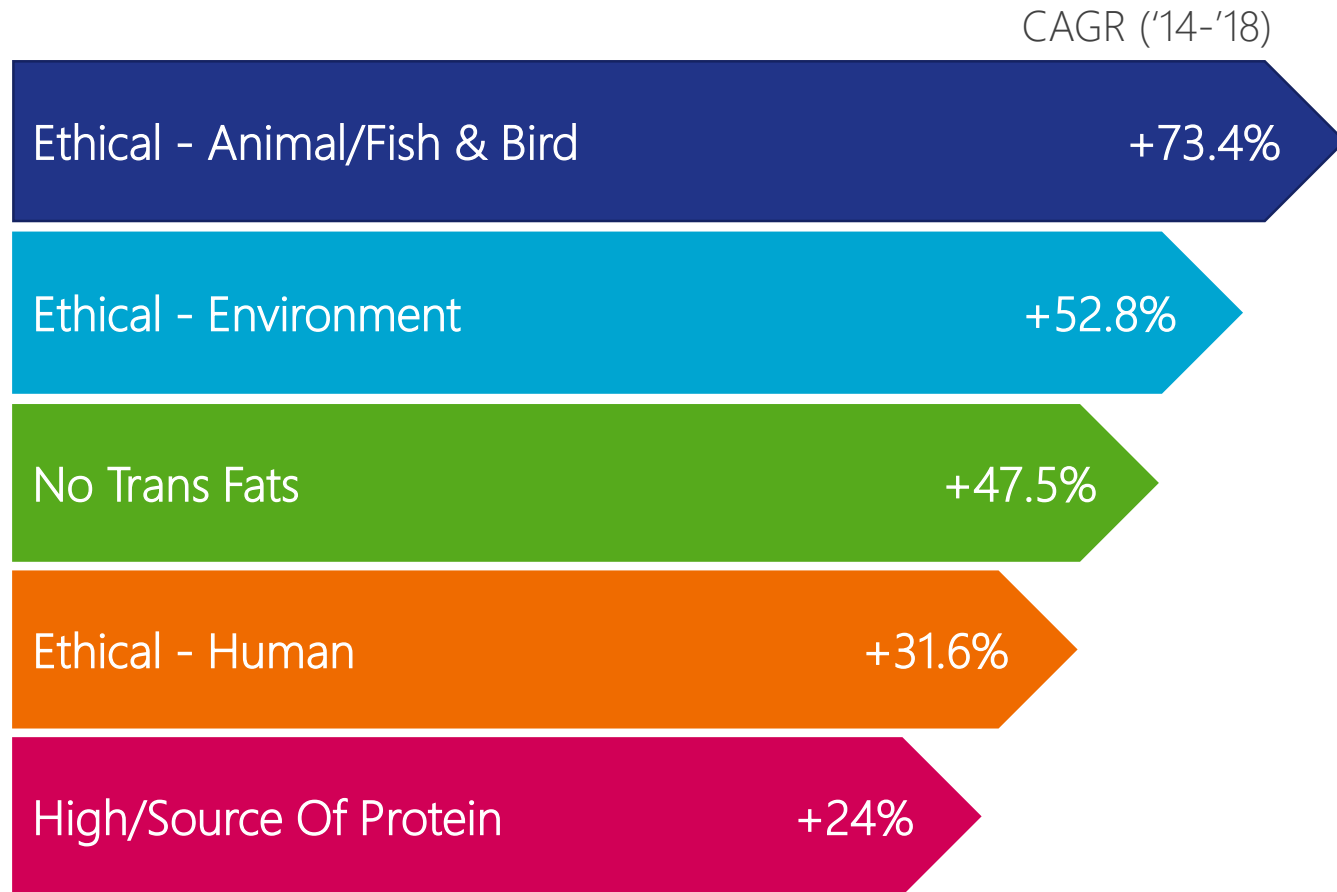
Ethics, free from, clean label and pleasure lead in meat positionings in Europe

Number of new meat products product launches tracked per positioning (Europe, 2018 vs. 2014)



Health and ethical claims are fastest growing in European meat products

Fastest growing top positionings as an average annual growth rate (%) in new meat products product launches tracked (Europe, CAGR 2014-2018)

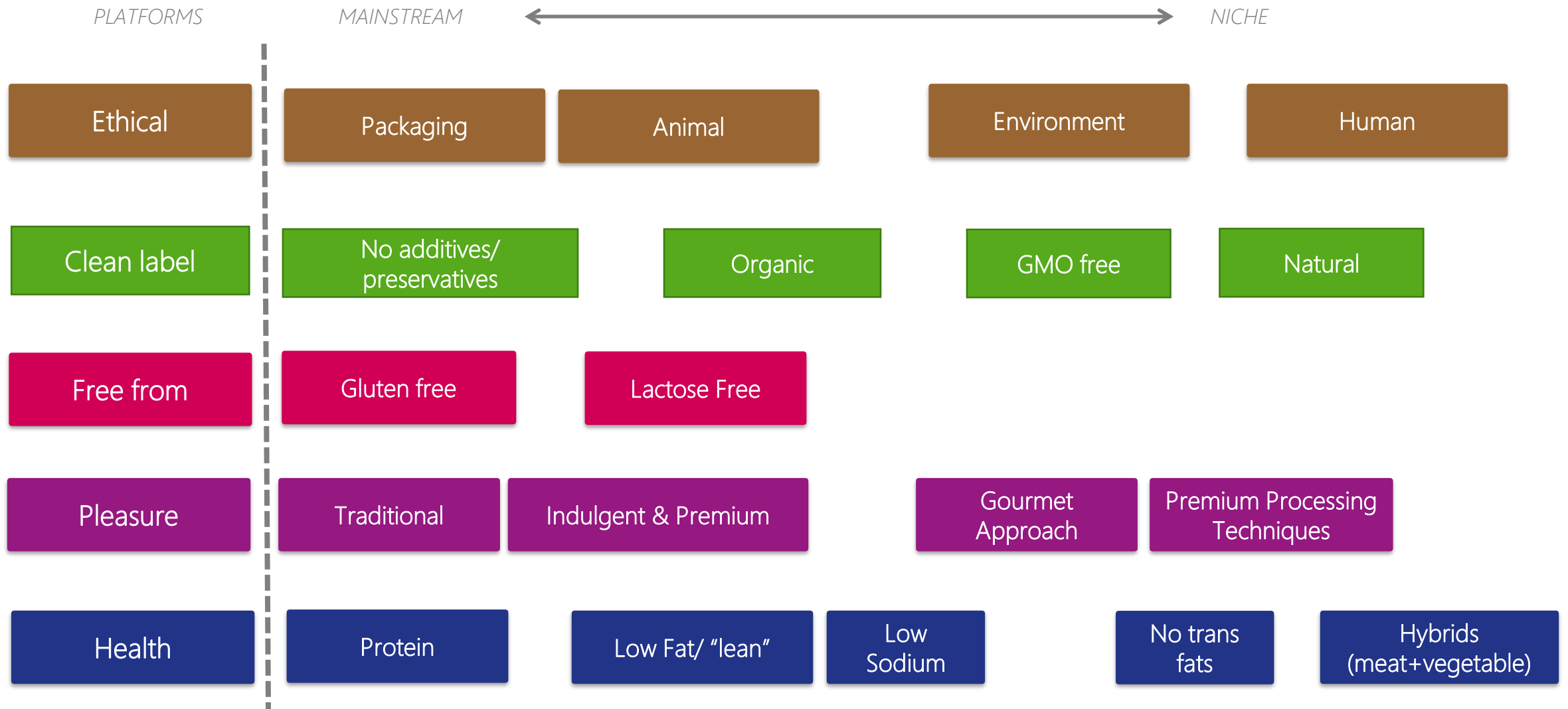


Stoeffler La Knack: Sausage

France, Jan 2019

CLAIMS **Pig raised without antibiotic during all their life. Animal welfare.** Good farming for good eating. Recipe with pork and beef. Beechwood smoking. Crunchy natural bowel.. French pork. Pork fed with French cereals and no palm oil. Farmers that respect animal welfare. Green Dot Certified. Recyclable packaging.

Key innovation platforms in meat products



European Consumer Insights in Meat, Fish & Eggs



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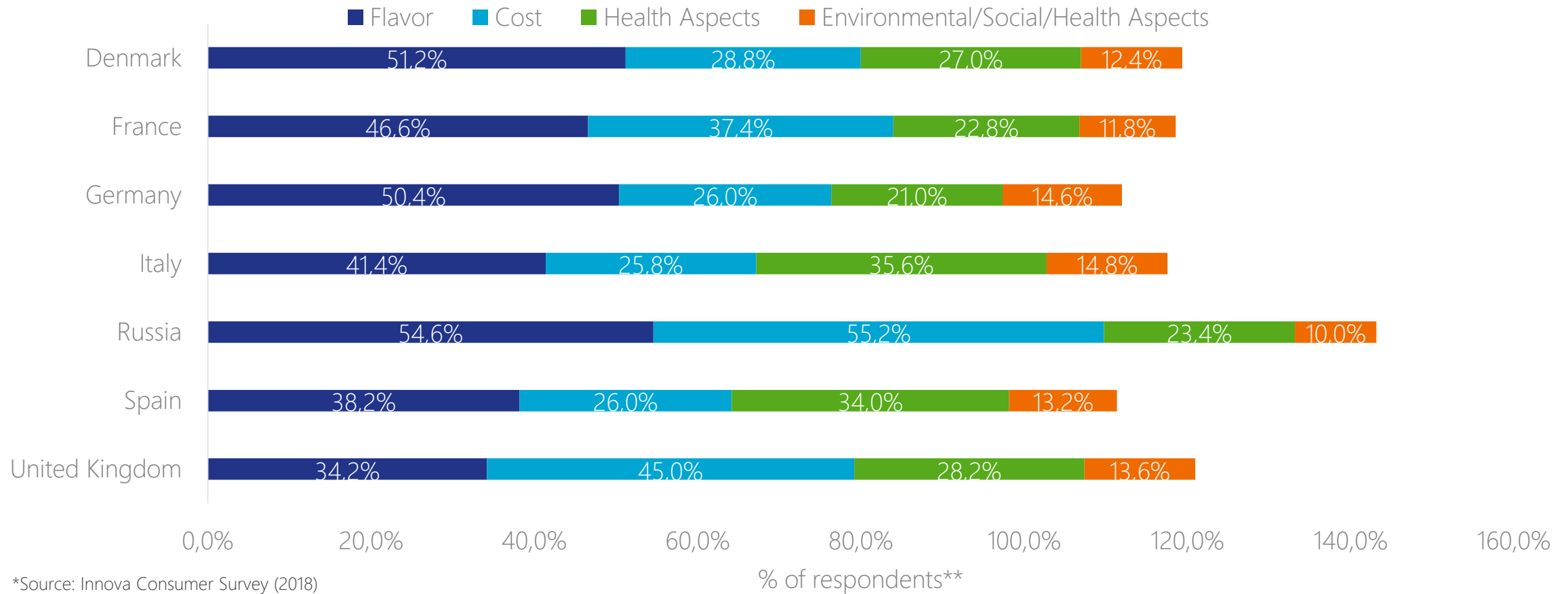


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Flavor is the main factor consumers pay importance when buying meat

- Except in Russia and United Kingdom, where cost is the main factor, flavor is what consumers pay most importance when buying meat. Health aspects are specially important in Italy and Spain and ethical aspects are a concern for German consumers.

What factors do you pay importance to when buying meat, fish & eggs?* (Europe, 2018)



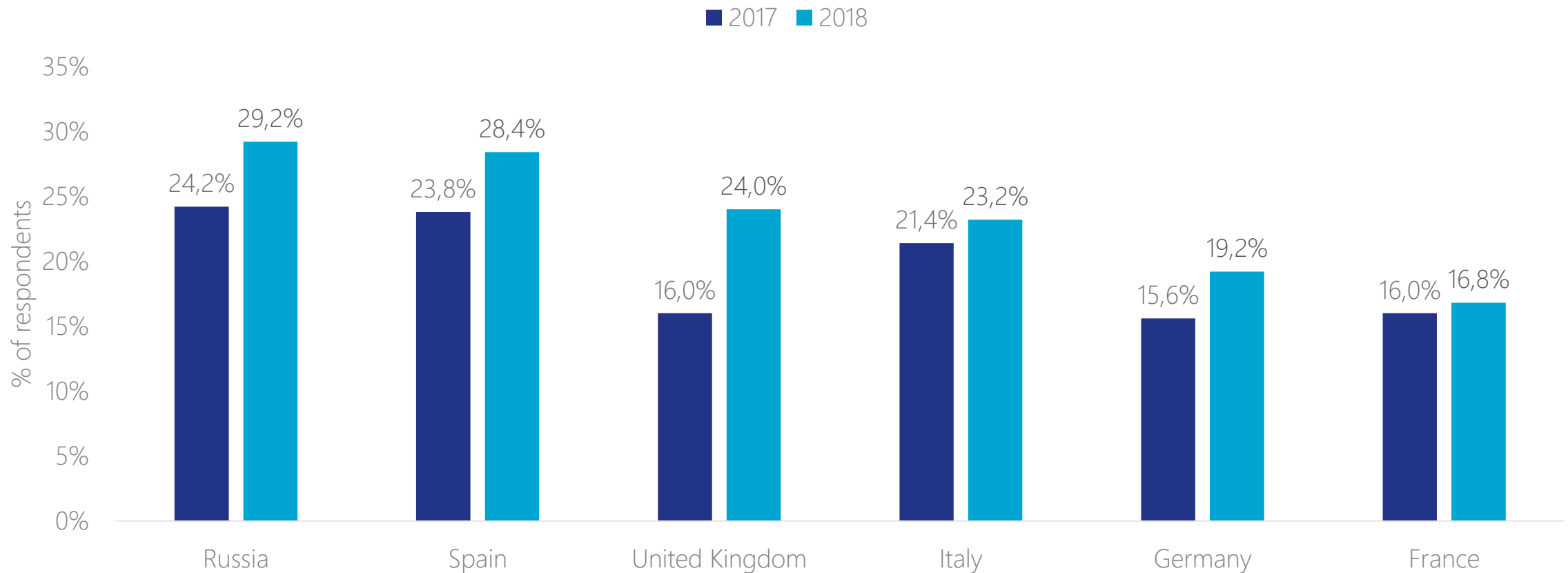
*Source: Innova Consumer Survey (2018)

**Results may be greater than 100% due to multiple answers by consumers.

Meat consumption increased most in United Kingdom and Russia

- Although United Kingdom and Russia lead the increase in meat consumption, all the analyzed countries had positive results when comparing 2018 to 2017

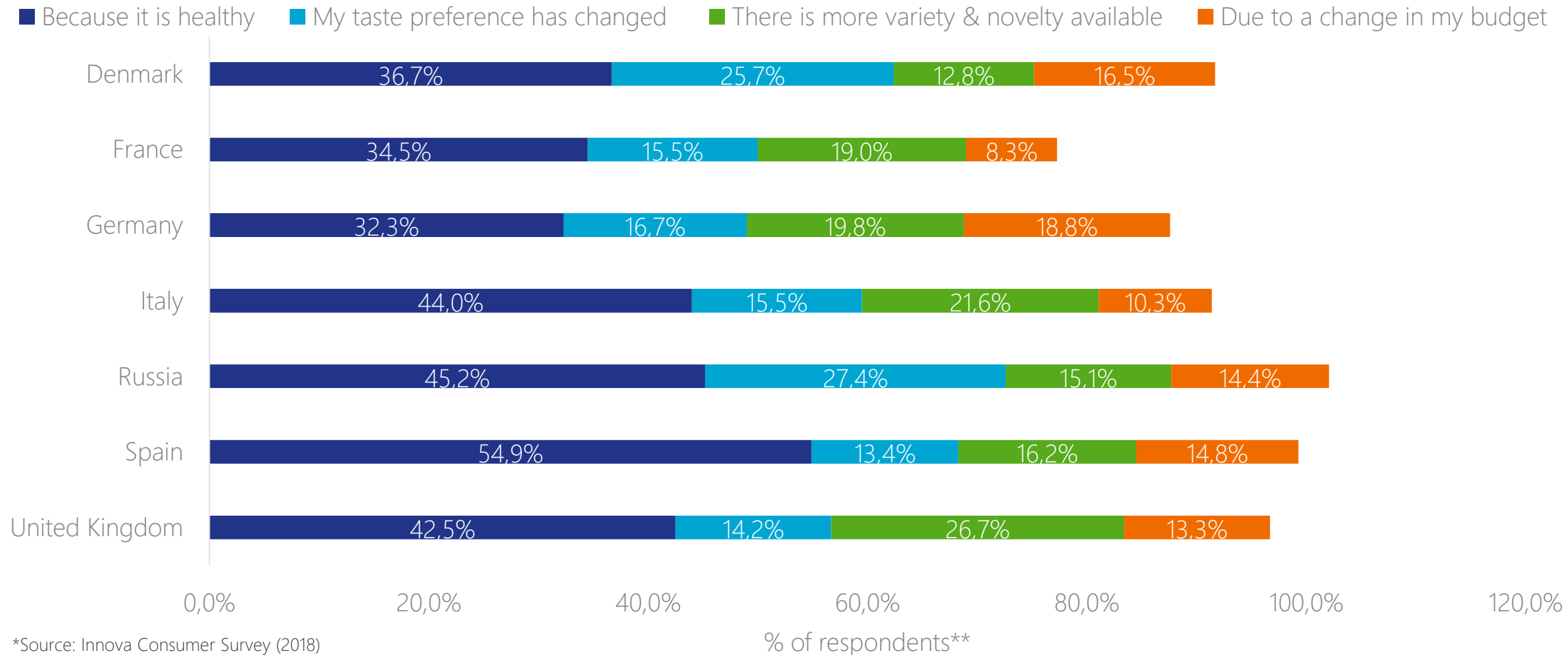
Have you increased your consumption of meat, fish & eggs over the last year? Answer: Yes* (Europe, 2018 vs. 2017)



*Source: Innova Consumer Survey (2018) and Innova Consumer Survey (2017)

Health concern is top reason for meat consumption increase in Europe

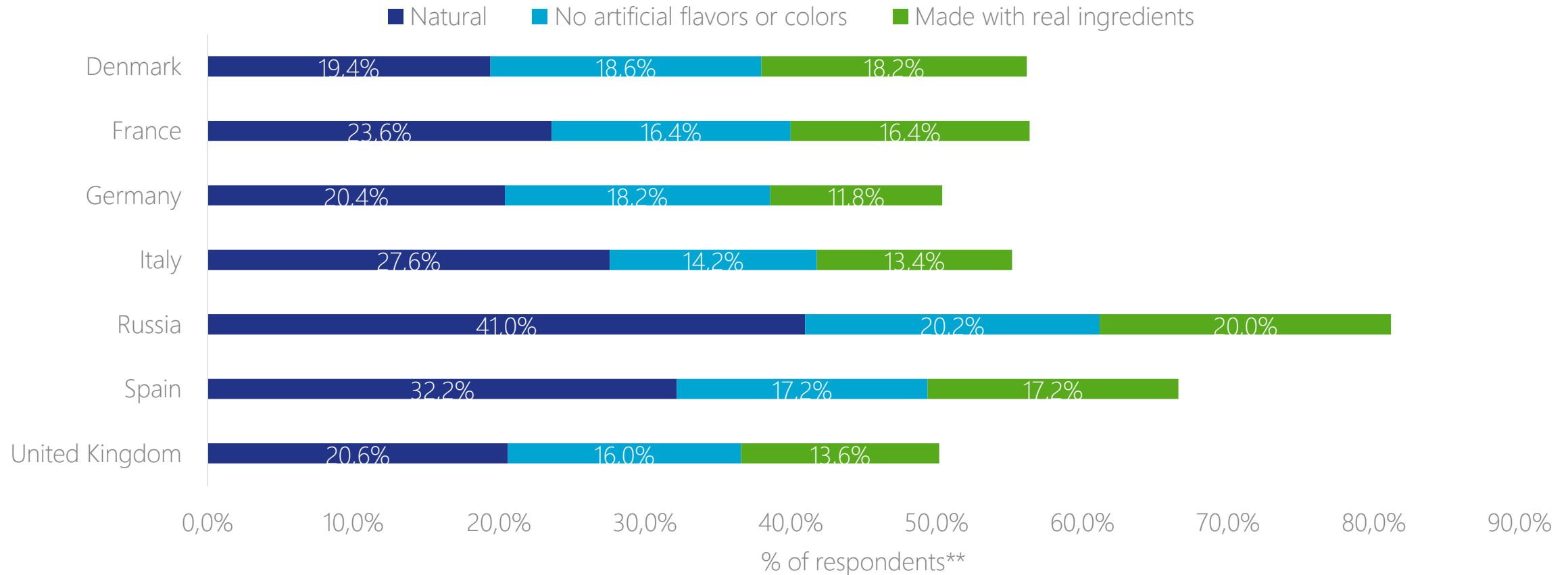
Why have you increased your consumption of meat, fish & eggs?* (Europe, 2018)



Clean label is the main factor influencing meat purchase in Europe

- 'Natural' is the leading factor influencing purchase of meat, fish & egg products in all the analyzed countries followed by 'no artificial flavors or colors' and 'made with real ingredients'.

Choose up to three factors that most influence your purchasing decision when purchasing meat, fish & eggs?* (Europe, 2018)



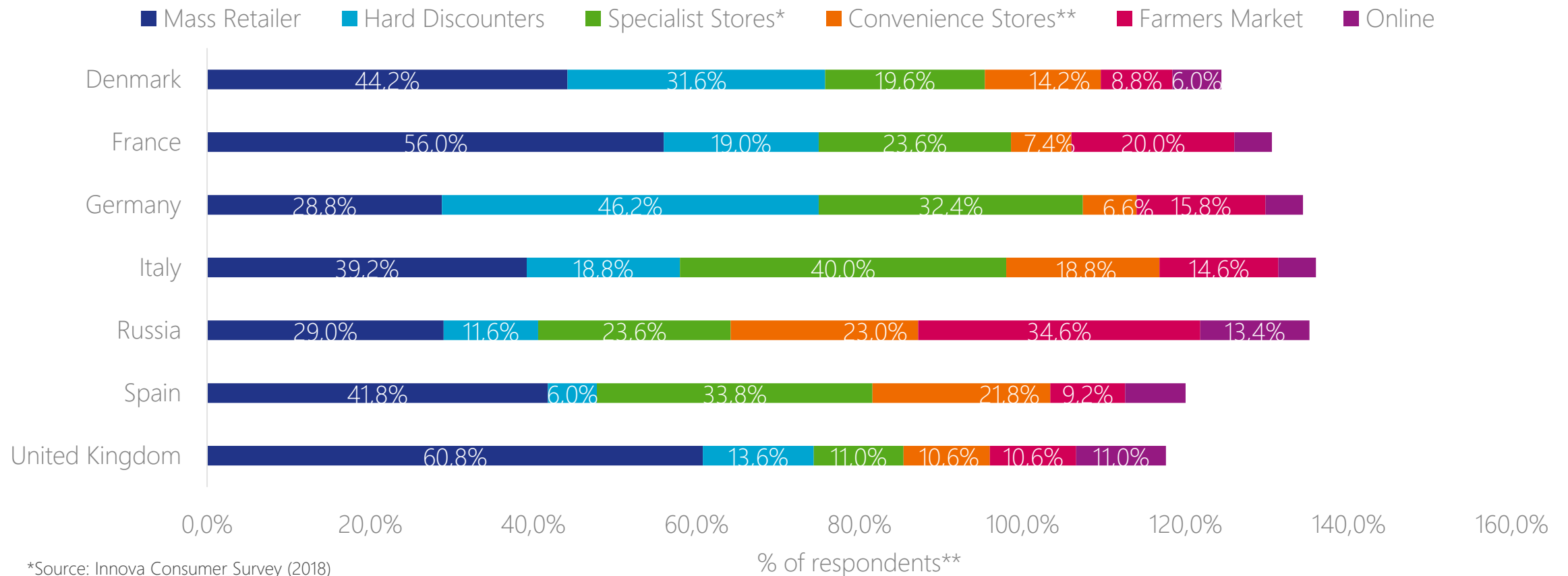
*Source: Innova Consumer Survey (2018)

**Results may be greater than 100% due to multiple answers by consumers.

Physical stores still lead meat purchase, but online sales are emerging

- The channels in which meat, fish & eggs are purchased vary among countries in Europe. It is important to notice that online channel is emerging in all the analyzed countries and is stronger in Russia and United Kingdom.

Where do you typically purchase meat, fish & eggs?* (Europe, 2018)



*Source: Innova Consumer Survey (2018)

**Results may be greater than 100% due to multiple answers by consumers.

Overview of Trends in Traditional Meat - Europe



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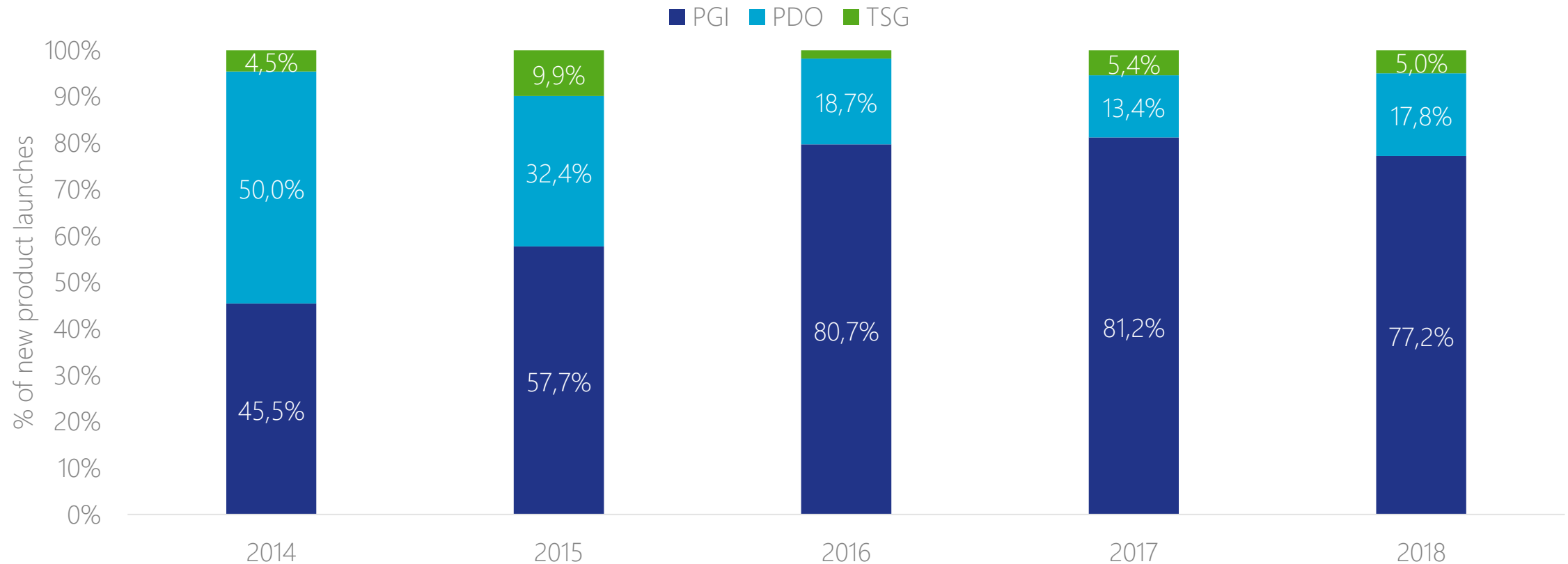


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2 out of 3 NPL with traditional seal in meat in Europe has a PGI seal

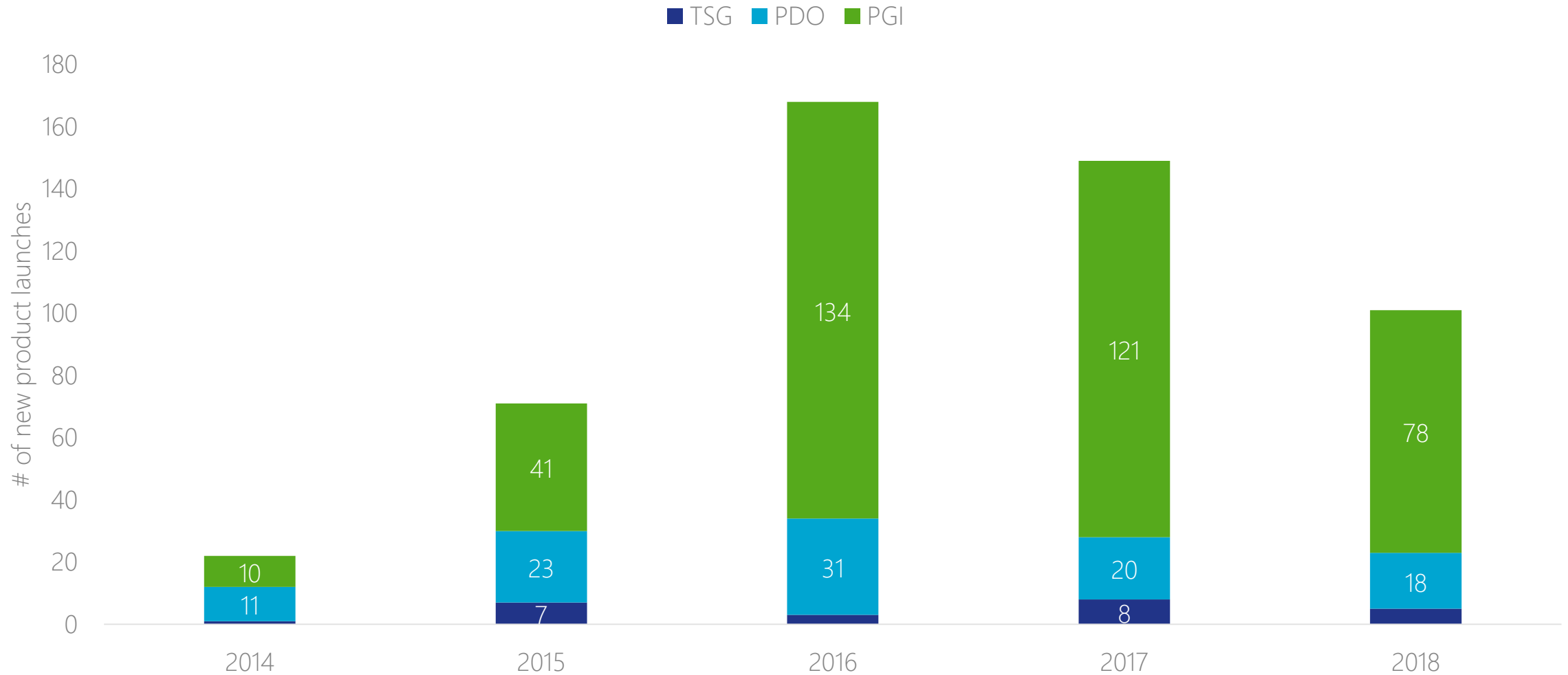
- In 2014 half of meat products with traditional seal had a PDO seal while in 2018 its presence decreased and PGI turned to be the main claim among the top three seals analyzed in European meat products.

Share of PGI, PDO and TSG claims as percentage (%) of new meat product launches tracked with traditional/origin seal (Europe, 2014-2018)



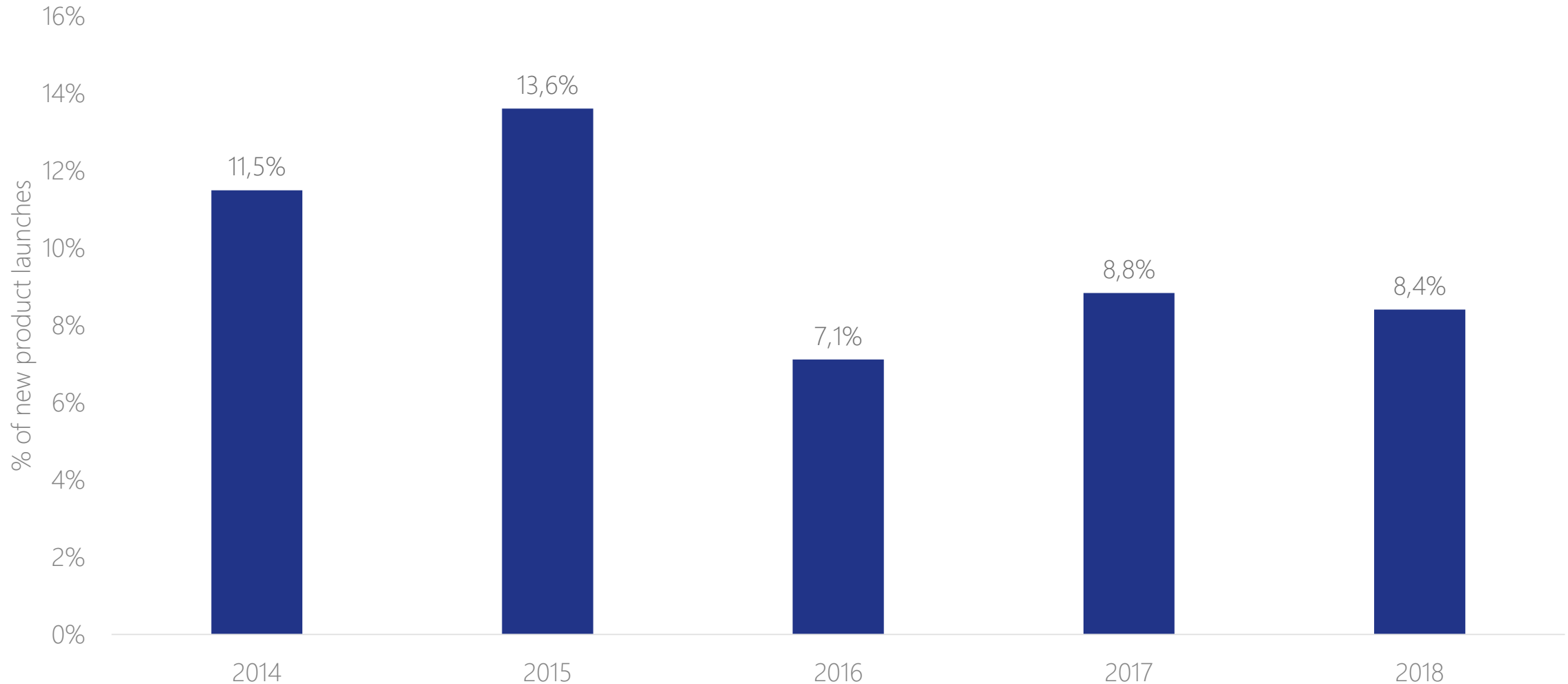
2016 is the year with highest NPD with TSG, PDO and PGI seals

Number of new meat products launches tracked with traditional/origin seal (Europe, 2014-2018)



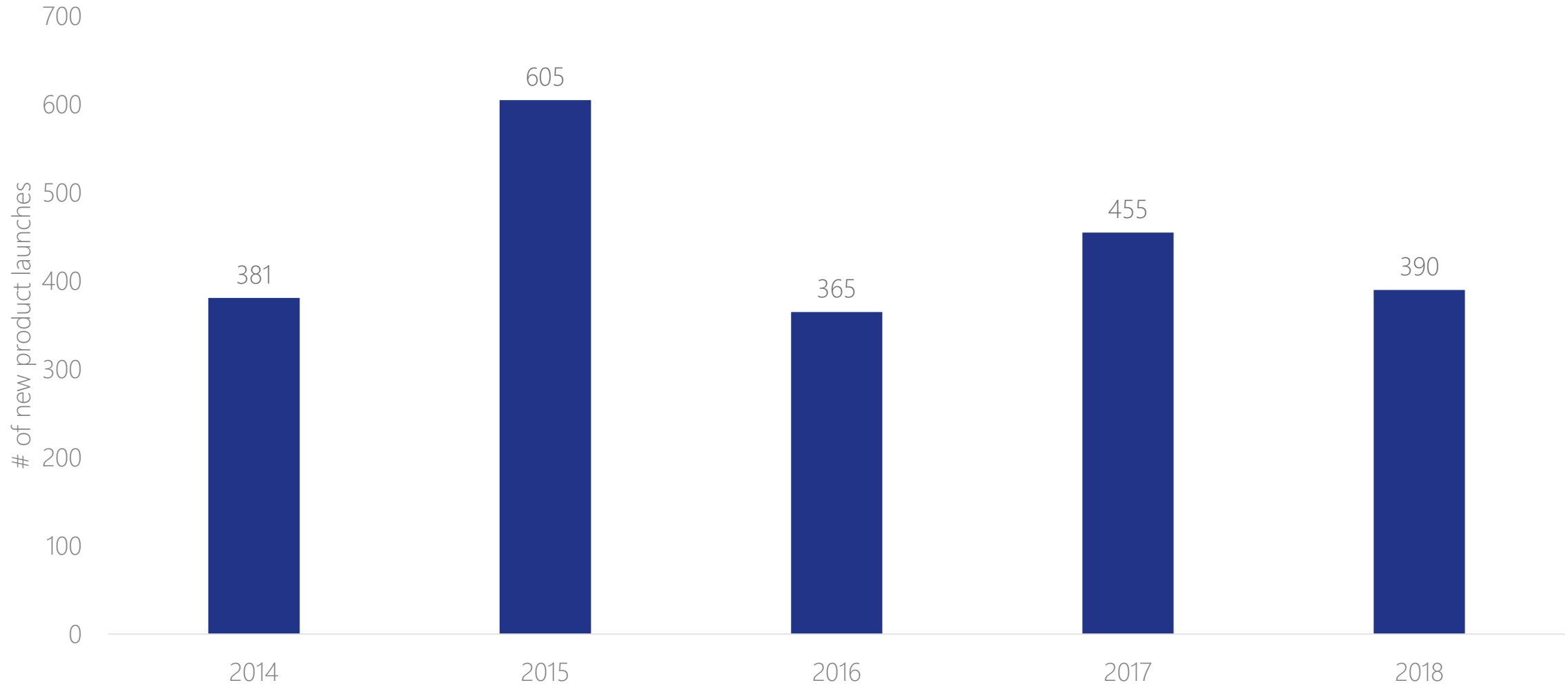
Traditional positioning fluctuates in European meat products

Share of traditional positioning as percentage (%) of new meat products launches tracked (Europe, 2014-2018)



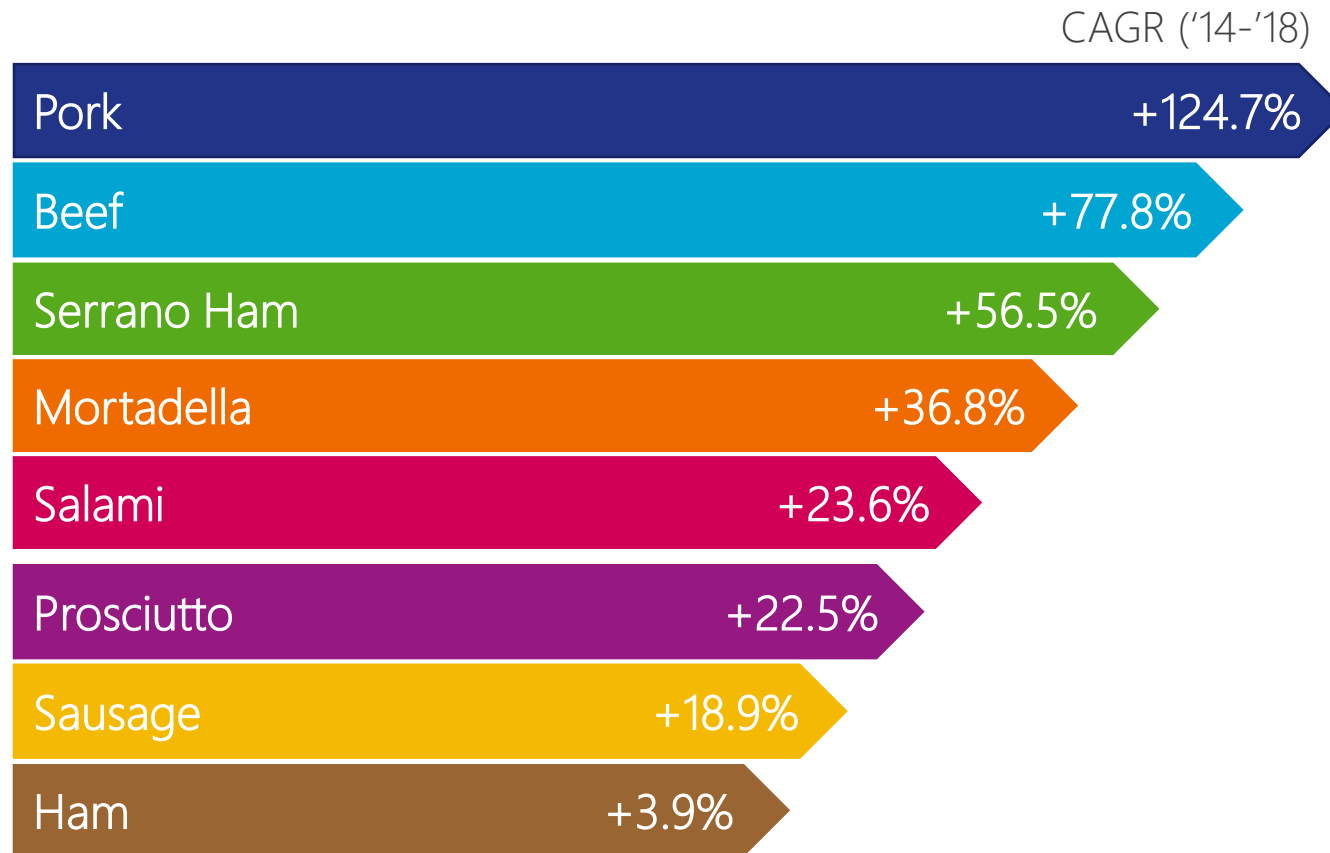
Traditional positioning fluctuates in European meat products

Number of new meat products with traditional positioning launches tracked (Europe, 2014-2018)



Pork and beef are fastest growing product bases in European meat

Fastest growing product bases as an average annual growth rate (%) in new meat products product launches tracked with traditional/origin seal (Europe, CAGR 2014-2018)



The Black Farmer Cured Pork Loin Medallions With A Cheese And Mustard Sauce

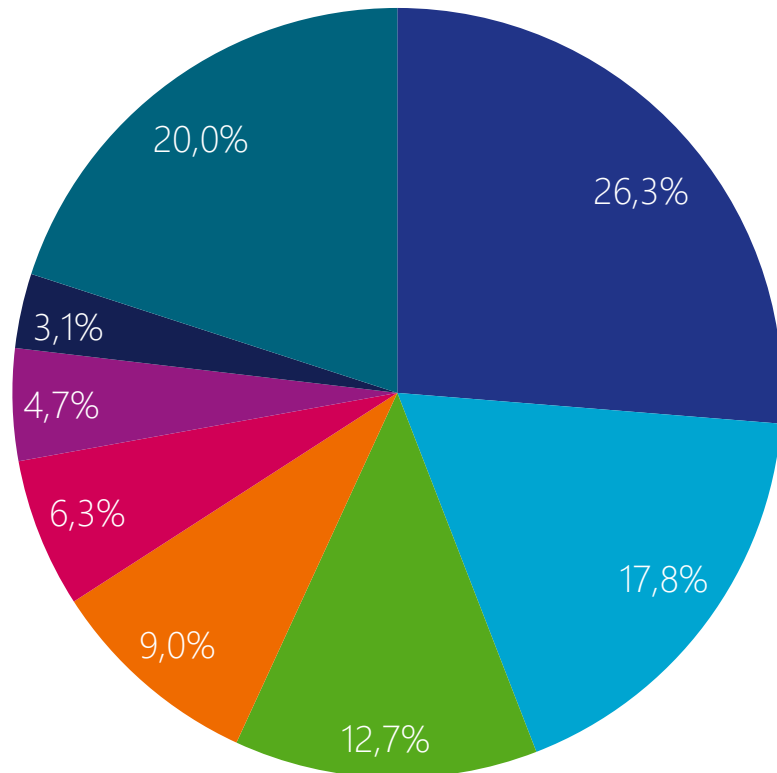
United Kingdom, Jan 2019

DESCRIPTION Two cured pork loin medallions with added water and a sachet of cheese and mustard sauce. Comes in a vacuumed plastic tray held in a cardboard sleeve.

1 in 4 new product launches with traditional/origin seal in Europe is Italian

Top countries as percentage (%) of new meat products product launches tracked with traditional/origin seal (Europe, 2014-2018)

- Italy
- France
- Germany
- Spain
- United Kingdom
- Portugal
- Denmark
- Rest of Europe



Il Viaggiator Goloso Salame Felino Igp: Felino Salami Pgi

Italy, Feb 2019

DESCRIPTION Felino salami in a 186g vacuumed plastic packet held in a cardboard sleeve.

CLAIMS Gluten free. Protected Geographical Indication logo.



Jambon Cru Fume De La Foret Noire: Smoked Black Forest Ham In Slices

France, Oct 2018

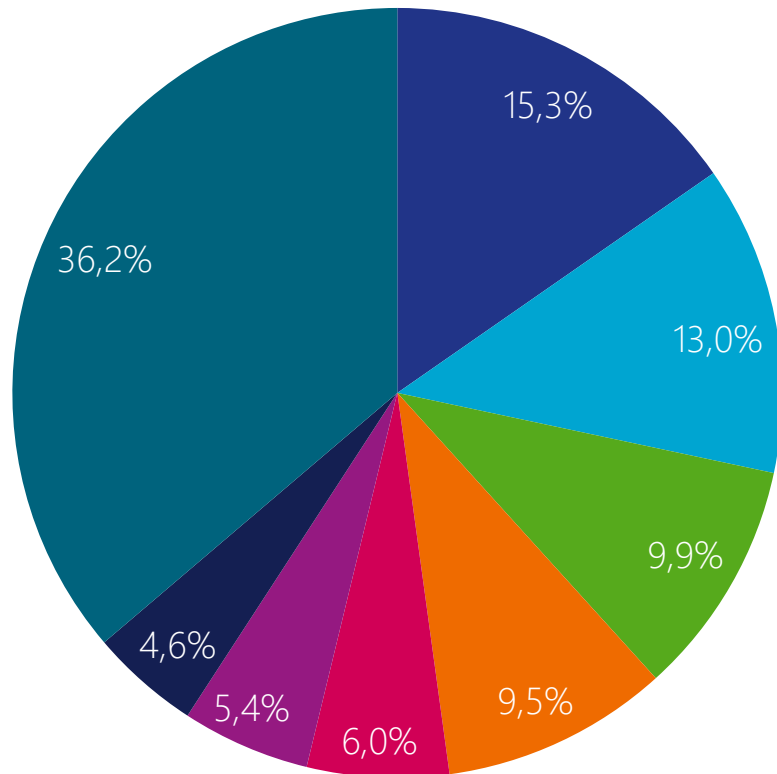
DESCRIPTION Ten slices of smoked black forest ham, in a plastic tray.

CLAIMS Protected Geographical Indication logo. Green Dot Certified.

Germany leads launches with traditional positioning in meat products

Top countries as percentage (%) of new meat products product launches tracked with traditional positioning (Europe, 2014-2018)

- Germany
- United Kingdom
- Ireland
- Spain
- Portugal
- Rest of Europe
- France
- Netherlands



Rewe Feine Welt Duroc Schinken: Duroc Ham

Germany, Feb 2019

DESCRIPTION Duroc ham slices in a plastic tray. The delicate, **traditionally made traditional Duroc ham** ripens for 16-18 months, creating an exceptional flavor that sets it apart from other Serrano ham.



Navidul La Fueteria Fuet Intenso: Intense Pork Sausage

Spain, Mar 2019

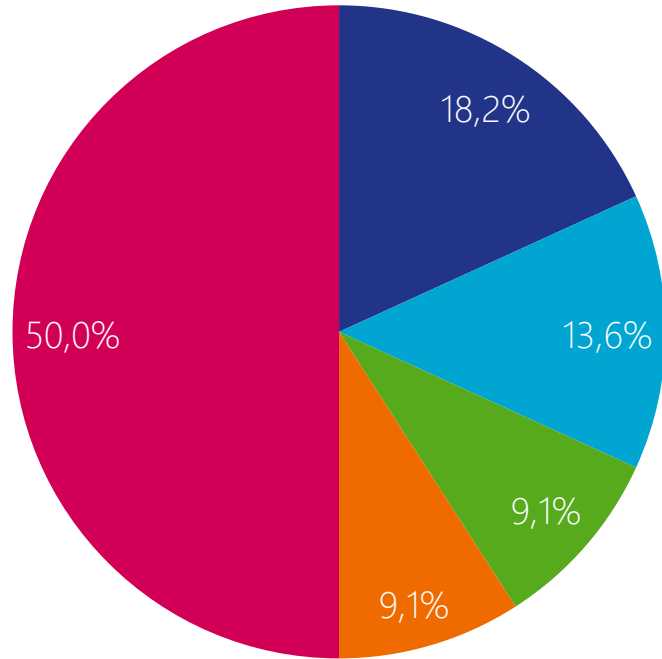
DESCRIPTION Intense pork sausage in a plastic packet.
 CLAIMS New fuet, **traditional recipe**. Gluten free. With Iberian pork meat. For Iberian lovers. Green Dot Certified.

Lidl is the top company in product launches with traditional/origin seal

- European market for traditional products is highly fragmented with nearly 60% of market divided with more than 50 companies. Mass retailers such as Lidl, Auchan, Conad and Citterio still lead launches with PGI, PDO and TSG claims.

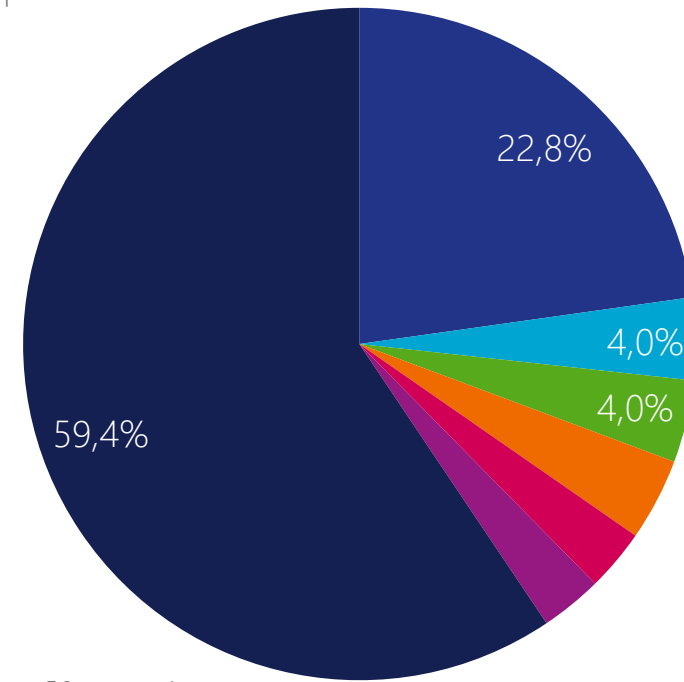
Top companies as percentage (%) of new meat products product launches tracked with traditional/origin seal (Europe, 2014)

■ Citterio ■ Lidl ■ Kesko ■ Sainsburys ■ Other Companies**



Top companies as percentage (%) of new meat products product launches tracked with traditional/origin seal (Europe, 2018)

■ Lidl ■ Auchan ■ Conad
 ■ Citterio ■ Carrefour ■ Intermarche
 ■ Other companies***



* Other companies = 15 companies

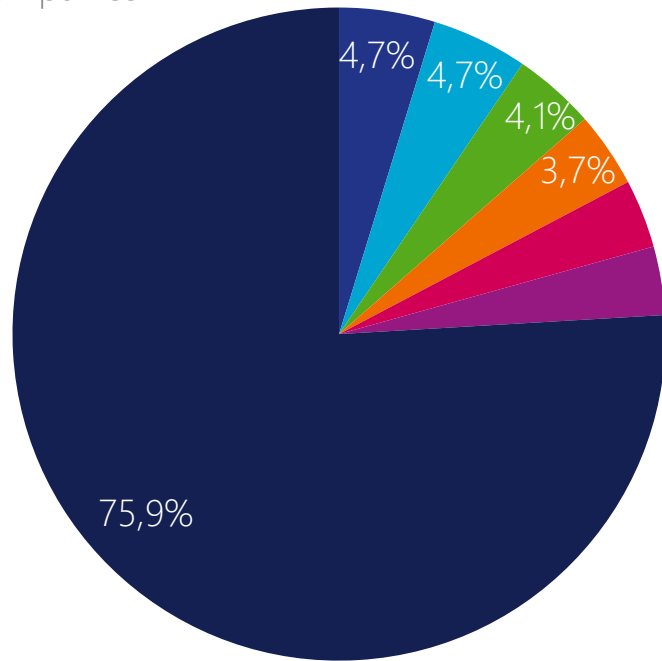
*** Other companies = 56 companies

European market for meat with traditional positioning is highly fragmented

- Market for meat products with traditional positioning is more fragmented than the segment of products with traditional/origin seal.

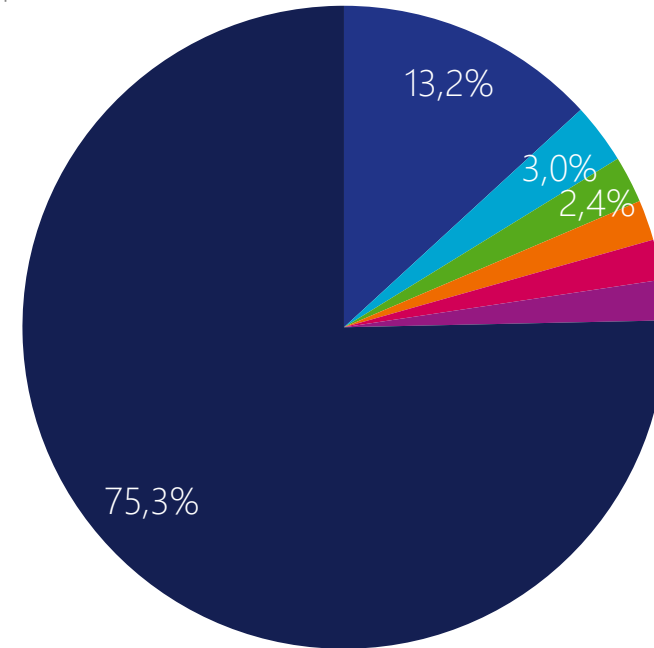
Top companies as percentage (%) of new meat products product launches tracked with traditional positioning (Europe, 2014)

- Lidl
- Aoste
- Other companies*
- Fleury Michon
- Hk Scan
- Tesco
- Aldi



Top companies as percentage (%) of new meat products product launches tracked with traditional positioning (Europe, 2018)

- Lidl
- Campofrio
- Other companies***
- Elpozo
- Miratorg Zapad
- Hk Scan
- Oflynns**



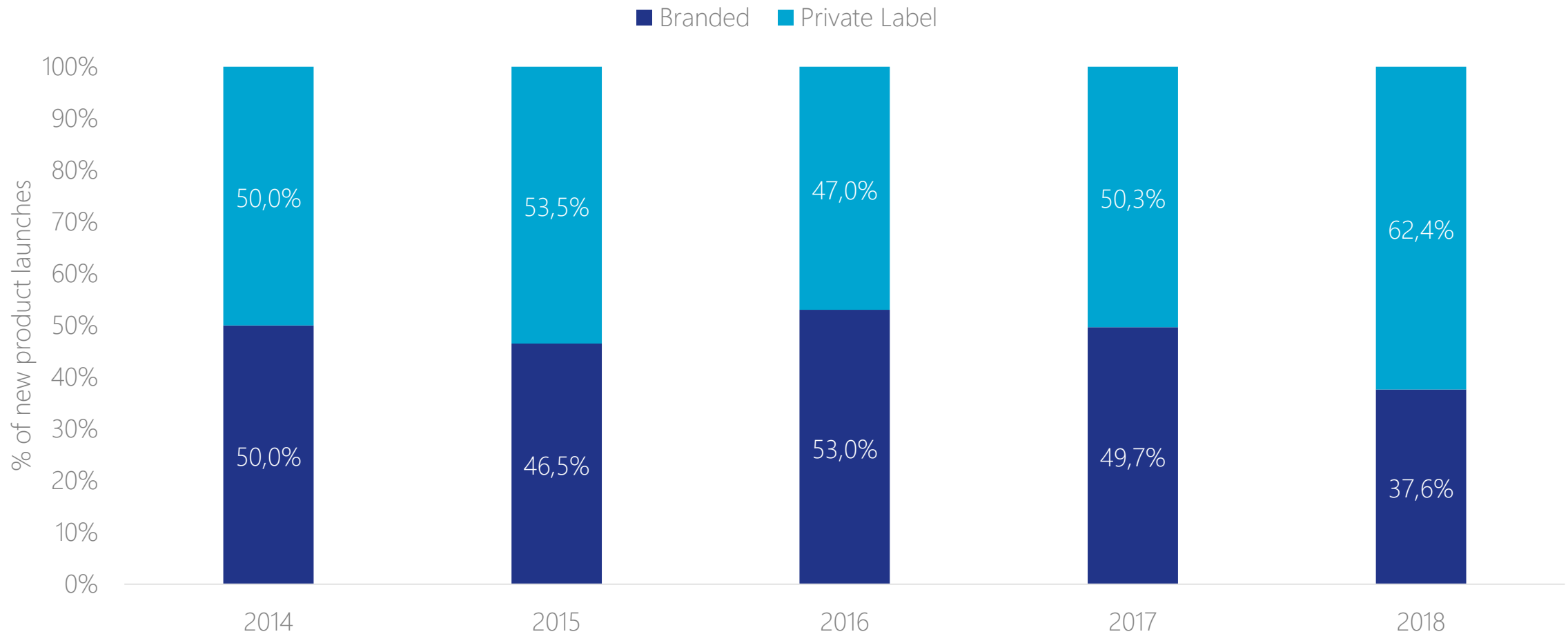
** Oflynns Gourmet Sausage Company

*** Other companies = 110 companies

* Other companies = 93 companies

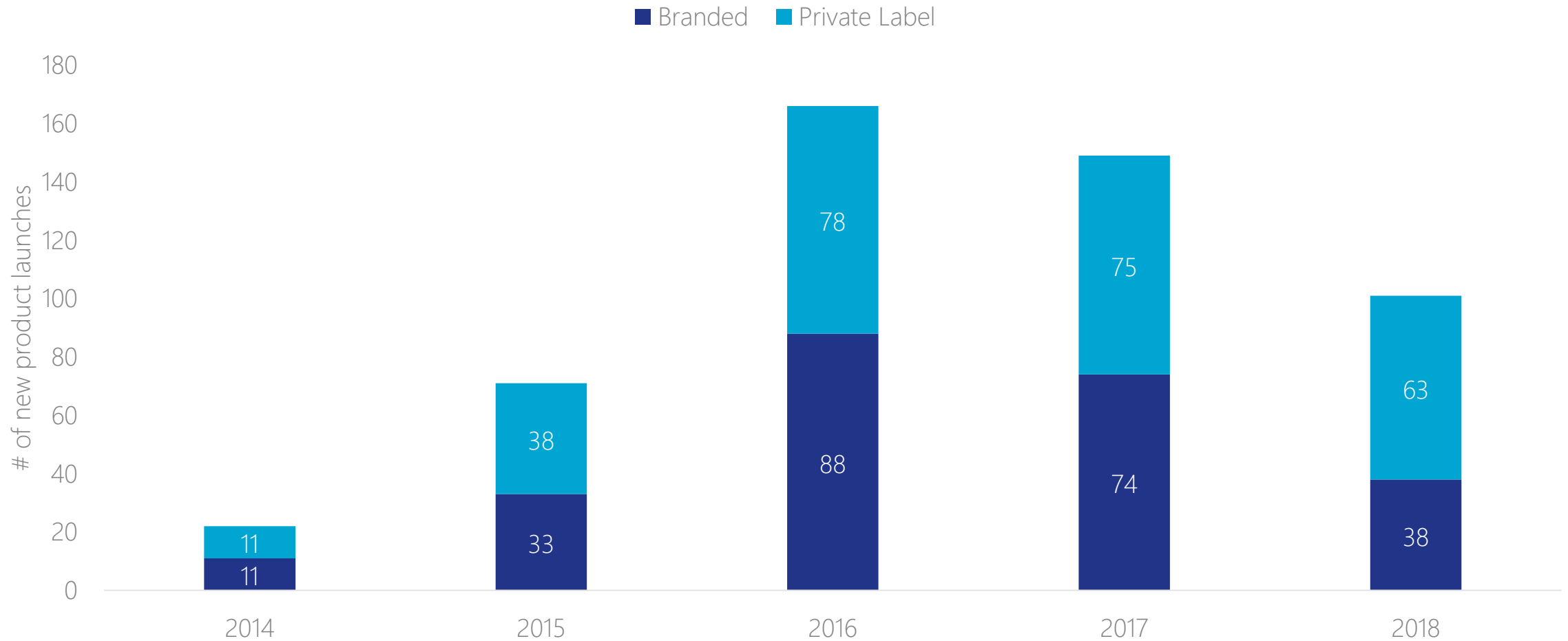
More private label meat products with traditional claims hit the shelf

Share of branded and private label as percentage (%) of new meat products product launches tracked with traditional/origin seal (Europe, 2014-2018)



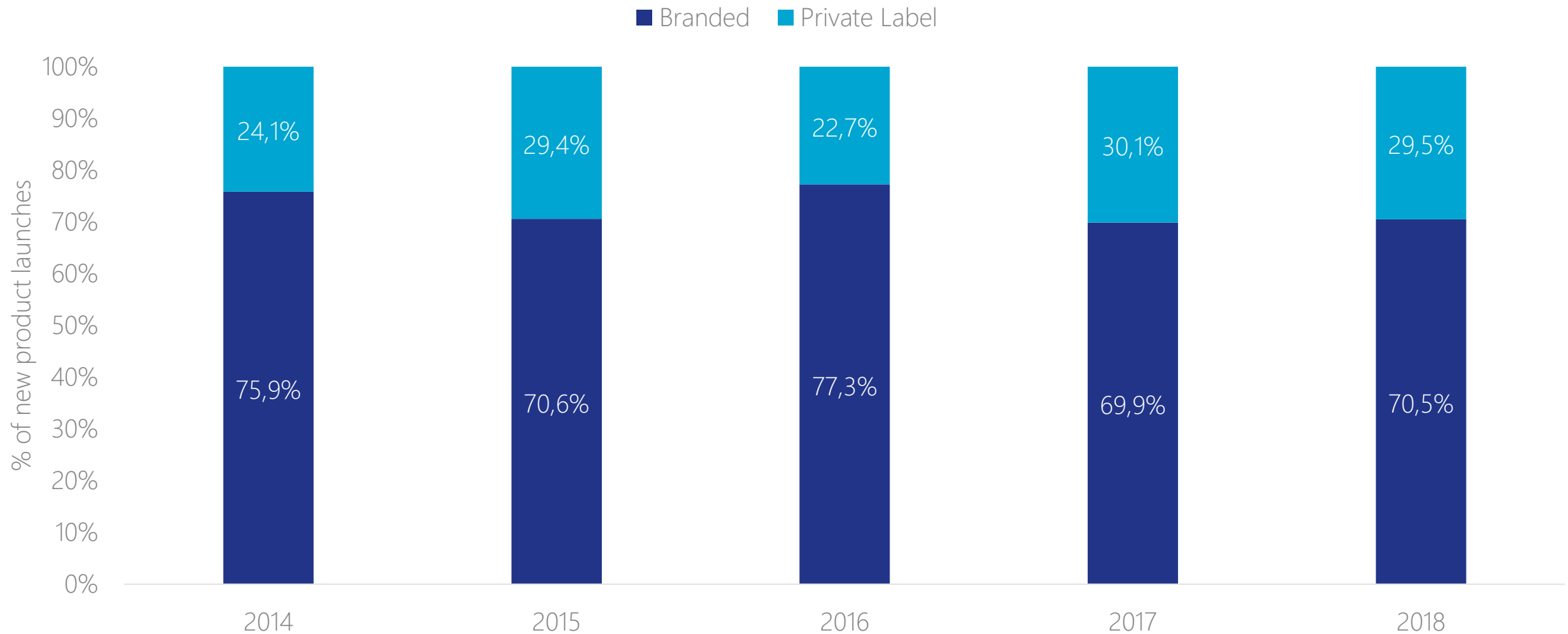
Presence of private label increased in products with traditional/origin seal

Number of new meat products with traditional/origin seal branded and private label (Europe, 2014-2018)



More branded products with traditional positioning and absence of seal

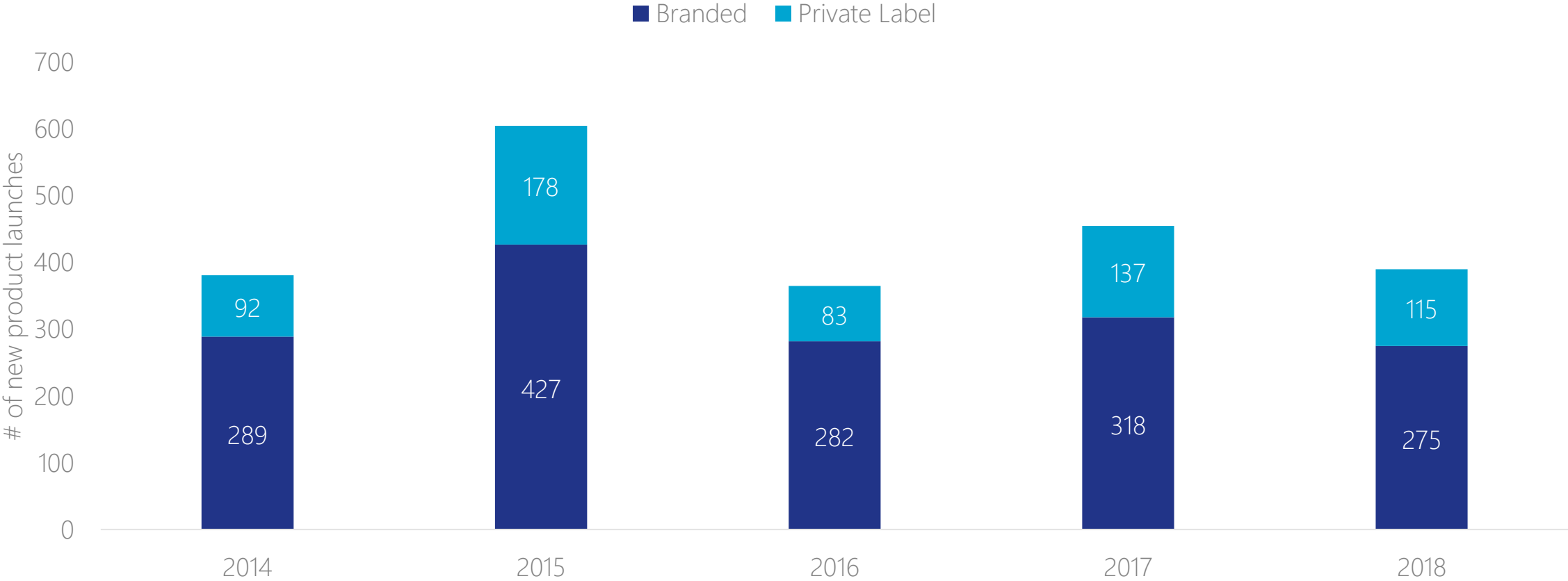
Share of branded and private label as percentage (%) of new meat products product launches tracked with traditional positioning (Europe, 2014-2018)



More branded products with traditional positioning and absence of seal

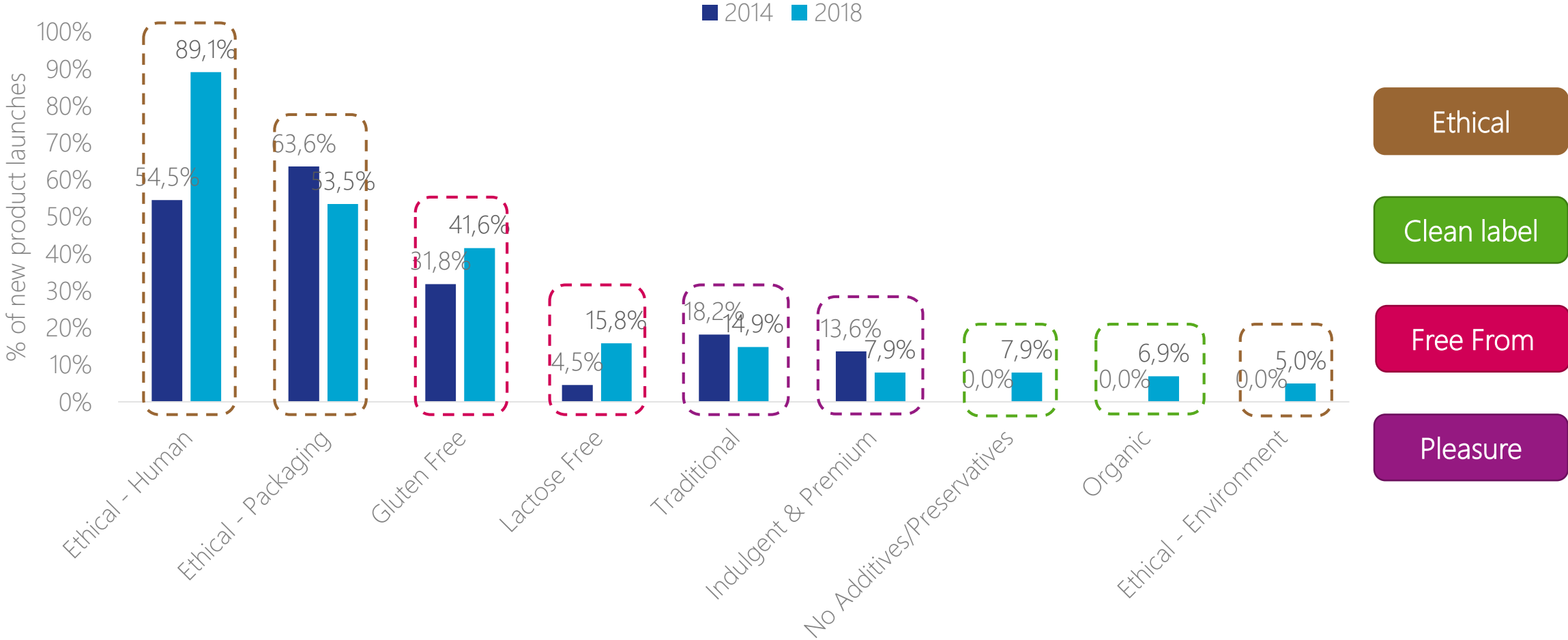
- While products with traditional/origin seal have higher private label presence, in products with traditional positioning and not necessarily having an origin seal, there is higher presence of branded product launches.

Number of new meat products with traditional positioning branded and private label (Europe, 2014-2018)



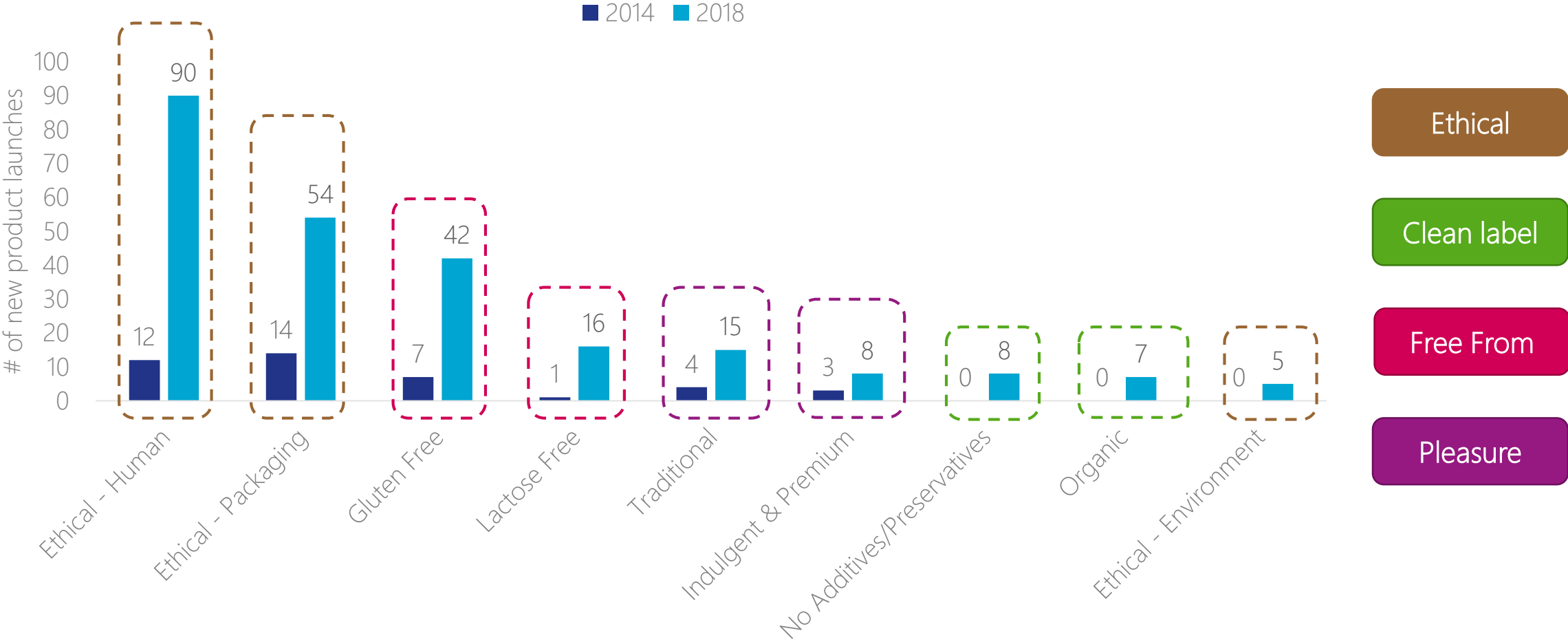
Ethical claims on top of traditional meat products in Europe

Top positionings as percentage (%) of new meat products product launches tracked with traditional/origin seal (Europe, 2018 vs. 2014)



Ethical claims on top of traditional meat products in Europe

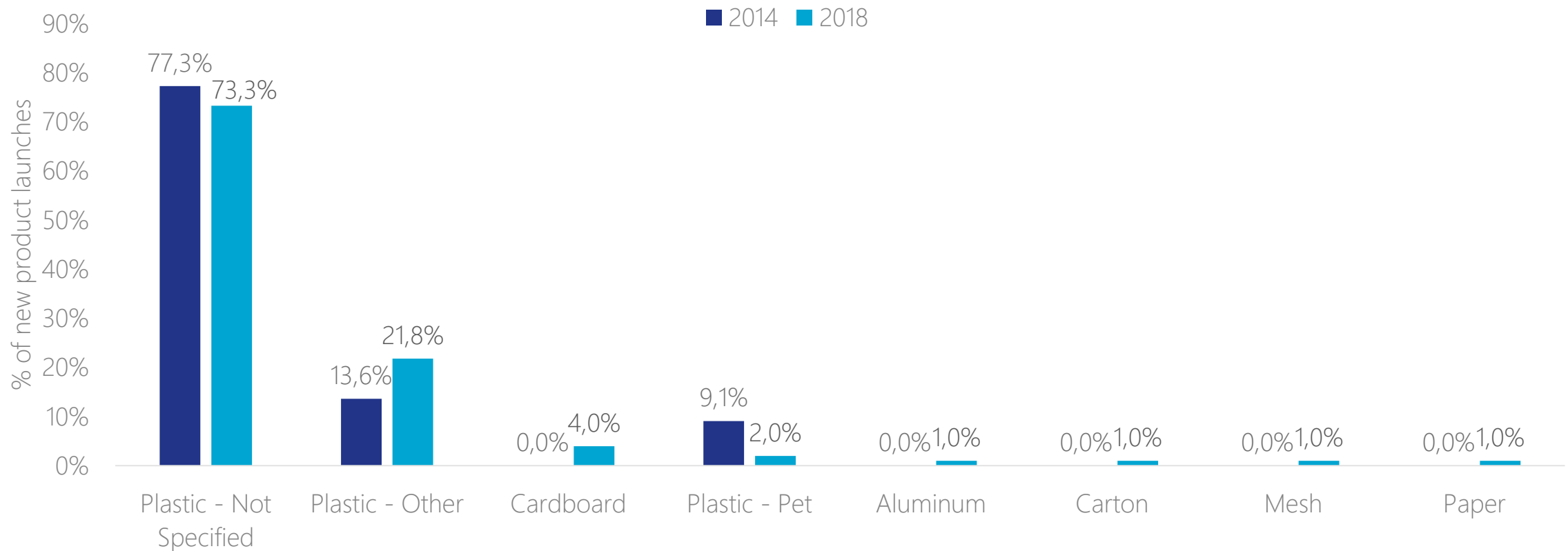
Number of new meat products with traditional/origin seal launches tracked per positioning (Europe 2014 vs. 2018)



Plastic alternatives on the rise

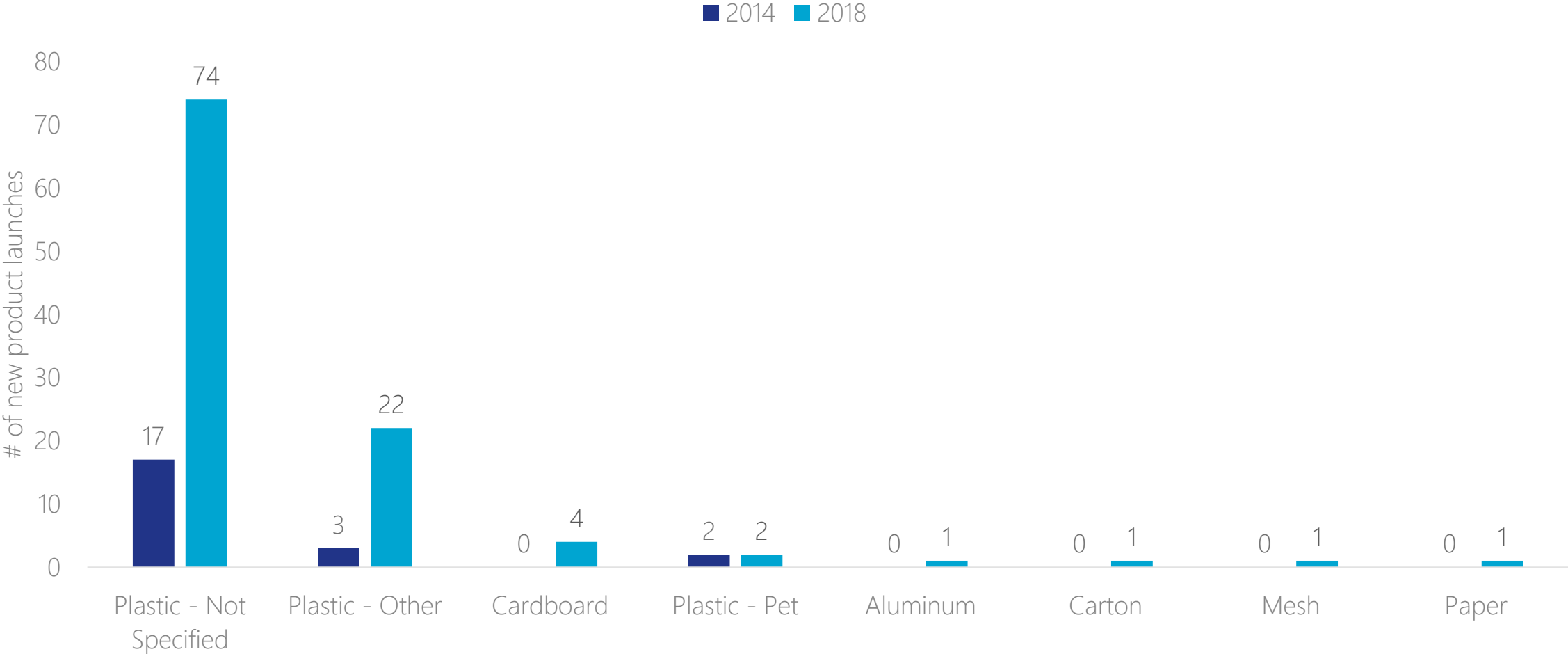
- Five years ago, plastic dominated meat products packaging with traditional/origin seal. In 2018 other packaging materials emerge such as aluminum, cardboard, carton and paper.

Packaging material as percentage (%) of meat new products product launches tracked with traditional/origin seal (Europe 2014 vs. 2018)



Plastic alternatives are increasing in meat products with traditional seal

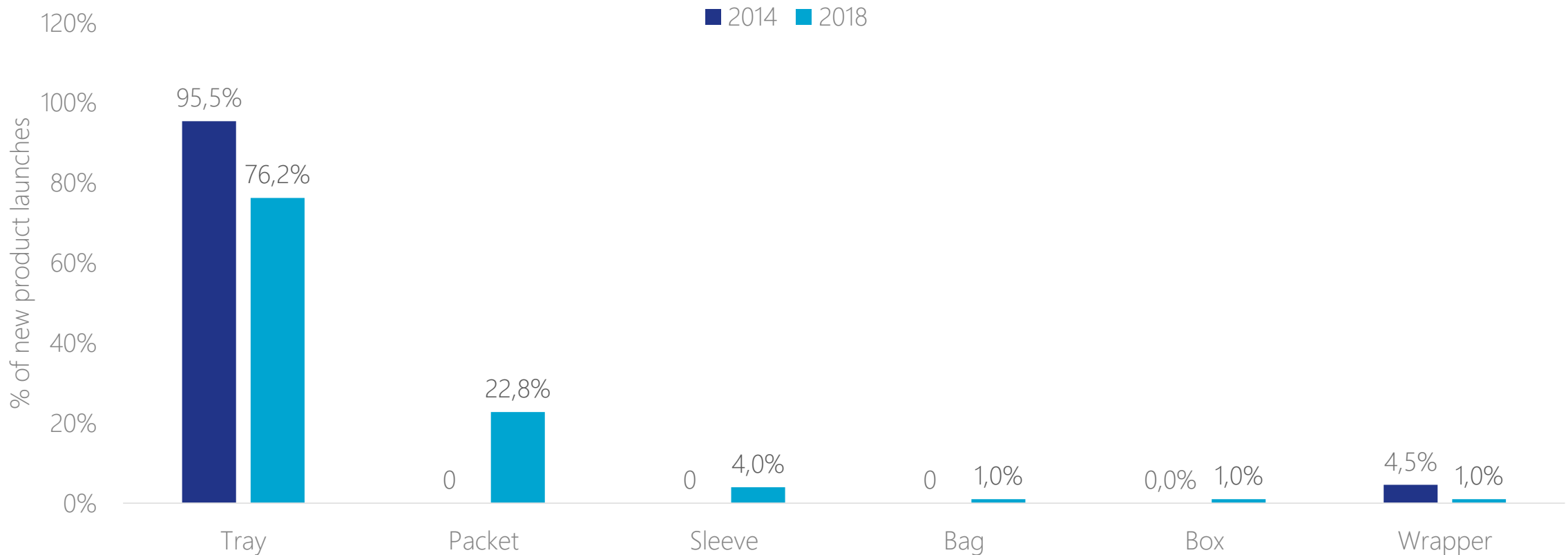
Number of new meat products with traditional/origin seal launches tracked per packaging material (Europe 2014 vs. 2018)



Tray remains the main packaging type, but other options are emerging

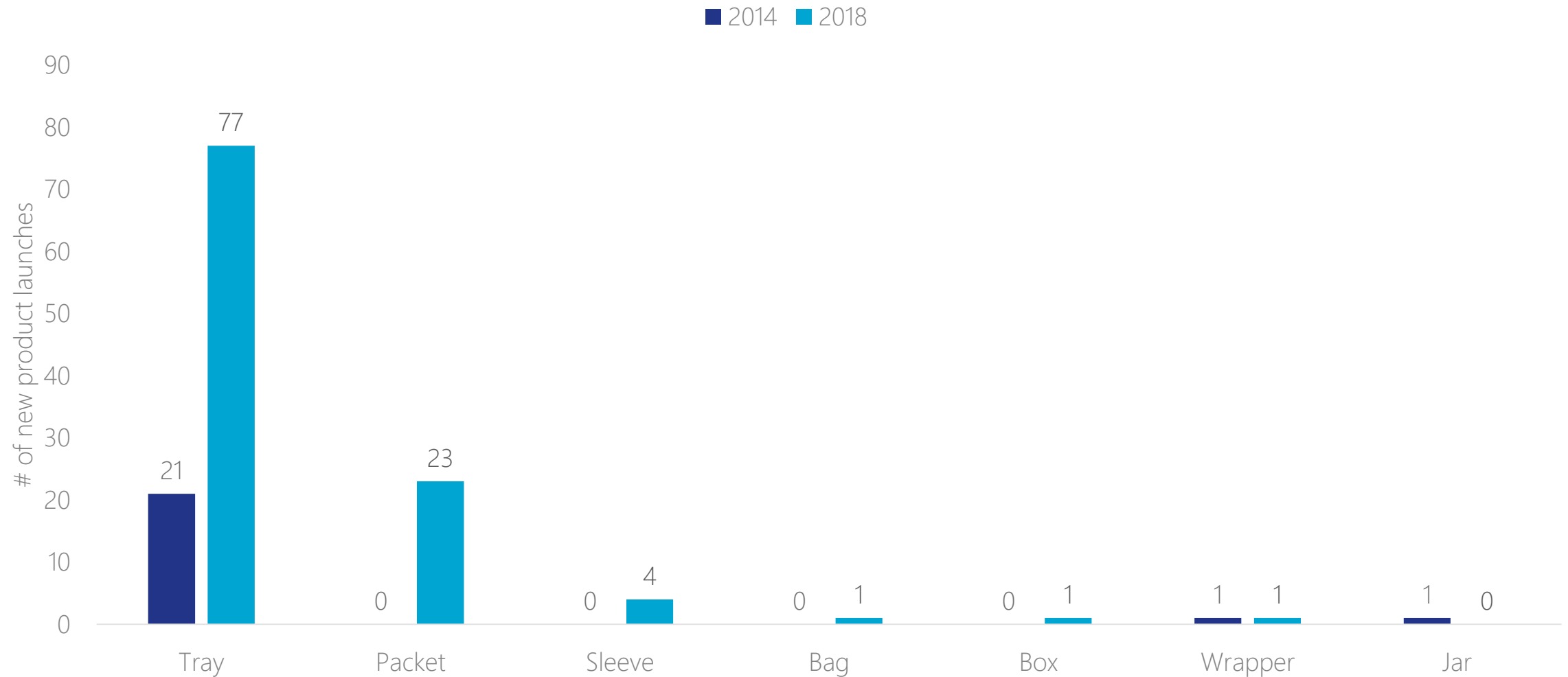
- Packet, sleeve, bag and box are growing options for traditional meat products in alternative to trays and wrappers.

Packaging type as percentage (%) of meat new products product launches tracked with traditional/origin seal (Europe 2014 vs. 2018)



Tray remains the main packaging type, but other options are emerging

Number of new meat products with traditional/origin seal launches tracked per packaging type (Europe 2014 vs. 2018)



Innovation Opportunities in Meat Products with Traditional/Origin Seal - Europe



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Spotlight on ethical claims: animal, human and packaging

ANIMAL



Rovagnati Naturals Mortadella Al Pistacchio: Mortadella With Pistachio

France, Feb 2019

CLAIMS Responsible quality. No nitrites. Eco pack. Taste and Italian tradition for a sustainable world. **Respect of animal welfare.** 0% antibiotics. 0% GMO. 0% nitrite added. No gluten. No milk derivatives.

HUMAN



Herta Gran Tradición Jamon Serrano: Serrano Ham

Belgium, Jan 2019

CLAIMS This Serrano Gran Reserva has been dried for 18 months to provide an intense and unique taste. **Herta is associated with some farms in Galicia.** Pork is raised traditionally. They are fed with chestnuts, which are abundant in the area. They walk freely in the mountains of Galicia (at least 3 times a week)...

PACKAGING



Borner Eisenacher Bio Kochhinter Schinken: Organic Cooked Ham

Germany, Dec 2018

CLAIMS Certified organic. FSC certified. Contribution to the environment: **73% less plastic. Recyclable packaging. 75% paper content.**

Traditional positioning is also used in products without the seal



Halberstadter Premium Wurstchen 5 Super Salchicas: 5 Premium Super Sausages

Spain, Mar 2019

CLAIMS Smoked in traditional fireplace.
Quality for 130 years. Gluten free. Lactose free.
Without milk proteins.



Principe Beechwood Smoked Ham

United Kingdom, Mar 2019

CLAIMS Lift out and serve. The unique pull-out tray makes it very easy to serve. Dairy free. Gluten free. Made following a **traditional recipe.** A family's passion for **excellence in Italian specialty meats since 1945.**



Bruri Traditional Baked Ham Slices

Ireland, Mar 2019

CLAIMS Recyclable packaging. **Traditional.** Big value, family twin pack. Bruri **combines heritage and tradition** with choice cuts of meat, this allows us to deliver you a product that all the family will enjoy and can used for all occasions.

Alcoholic flavors deliver premiumness and indulgence

WINE



Somalo 110 Chorizo Con Vino: Chorizo With Spanish Wine

Spain, Dec 2018

BEER



Asda Extra Special 6 Pork And Ale Sausages

United Kingdom, Nov 2018

IRISH CREAM LIQUOR



Morrisons 2 Beef Fillet Steaks With Irish Cream Sauce

United Kingdom, Jan 2019

Fruit inclusions provide a sweet flavor twist to meat products

FIG



Specialites Francaises Salami With Figs

Switzerland, Sep 2018

CRANBERRY



Gourmet Cranberry Schinken: Cranberry Ham

Austria, Feb 2019

ORANGE



Ballottine De Canard A L'orange: Ballottine With Duck And Orange

France, Dec 2018

MANGO



Asda 4 Mango And Chilli Pork Loin Steaks

United Kingdom, Ago 2018

Growing awareness around natural preservatives and less processed food

UNSMOKED

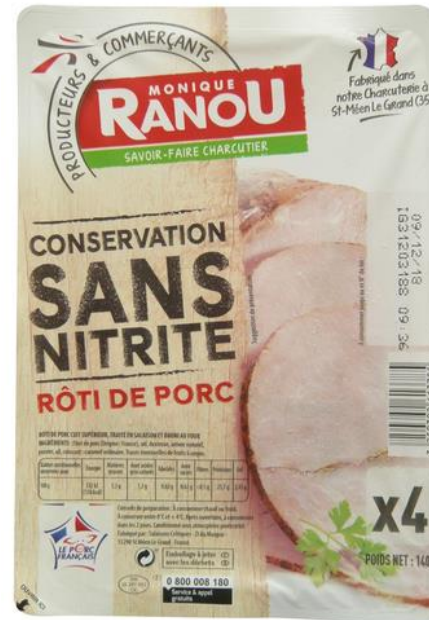


Sainsbury's Taste The Difference British Outdoor Bred Unsmoked Yorkshire Cured Gammon

United Kingdom, Jan 2019

DESCRIPTION Sainsbury's taste the difference british outdoor bred **unsmoked** yorkshire cured gammon joint contains 750g, comes in a mesh bag.

NO NITRITES



Monique Ranou Roti De Porc Sans Nitrite: 4 Roast Pork Slices

France, Nov 2018

CLAIMS **Preserved without the use of nitrites**. Made in France with French pork. Green Dot Certified.

NO PRESERVATIVES



El Zagal Sobrasada De Mallorca Etiqueta Negra: Black Label Sobrasada From Mallorca

Spain, May 2018

CLAIMS Gluten free. Lactose free. **No preservatives**. Protected Geographical Indication logo. Easy open. Green Dot Certified

Trends and counter trends drive developments of hybrids

MEAT + BUTTERNUT SQUASH



Sainsburys Love Meat And Veg 6 Chicken Sausages With Turmeric Red Peppers And Butternut Squash

United Kingdom, Jan 2019

MEAT + QUINOA



Domingo Ortiz Chorizo Con Quinoa: Chorizo With Quinoa

Spain, Dec 2018

MEAT + PUMPKIN



Prosus Crocchette Di Suino Con Zucca: Pork Croquettes With Pumpkin

Italy, Nov 2018

Processing makes indulgent and premium meat products

- Special processing techniques create differentiation on the market and can make products stand out of the shelves.



"Slow cooked for tenderness. No artificial preservatives, flavors or colors."



"21 days matured beef fillet Chateaubriand with separate sachet of red wine sauce."



"Hand cured in Suffolk and air dried to bring out the flavor. Hampshire breed pork is renowned for tenderness and superb flavor, and our Hampshire sired free range pork is bred for succulence."

Millennials and Gen Z: the next consumer generation

Traditional meat products get a packaging makeover, without changing product essence, to attract young consumers. Cheerful illustration, artistic design and appealing colors makes for a distinctive meat product.



Vacuumed skin packaging makes for a clean and appealing product



Increase in resealable packaging options to provide extra convenience



Quicook Albondigas Rellenas De Calabaza Y Miel: Meatballs Stuffed With Pumpkin And Honey

Spain, Jan 2019

DESCRIPTION An exotic combination, which mixes the traditional flavor of pork meatball with the sweet taste of pumpkin and honey; You will not be able to resist this contrast of gourmet flavors. **Comes in a resealable plastic packet.**



Lithells Smal Grillkorv: Small Grill Sausage

Sweden, Jan 2019

DESCRIPTION A raw and juicy barbecue sausage that is small in shape. Mild flavor of black pepper and made of Swedish meat. Grill evening's obvious guest that is enough for the whole family.



Tesco 5 Crumbed Ham Slices

United Kingdom, Feb 2019

CLAIMS **Peel and reseal pack.** Made with British pork. Gluten free. Tesco work with a long-established group of dedicated farms using hand-butchered selected cuts or pork leg. The pork is then dry cured for at least four days to give a fuller flavor and succulent texture. Recyclable packaging.

Transparent window packaging to sneak a peek at the product



La Finca Carpaccio De Vacuno: Beef Carpaccio

Spain, Dec 2018

DESCRIPTION Carpaccio of beef marinated with olive oil and Parmigiano Reggiano cheese, in a 90g plastic tray held in a cardboard sleeve.



Perelik Reserve Game Salami

Bulgaria, Nov 2018

DESCRIPTION Long lasting salami made with deer, bore and pork meat, in 180g chub packet, held in a 180g carton box.



El Chico Chorizo Extra Picante: Extra Spicy Chorizo

Spain, Jan 2019

DESCRIPTION Three extra spicy chorizos in a plastic packet held in a carton box.

Key learnings & What's next ?



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Key learnings & What's next ?

The Future is Craft

Although industrial processes have advantages such as faster production, lower costs and increased shelf-life, craft food is not at risk. Consumer demand for artisanal* products increased 21% on average per year (Europe, CAGR 2014-2018). Crafted products convey a natural image and a sense of uniqueness, since there are variations among products due to the hand made processing.

Targeting young generations

The crafted process of traditional meat products also has an appeal among younger consumers. There are opportunities to target this generation by investing in new flavors, cheerful packaging design and transparency about the product and the production system with ethical positionings.

Positively Processed

Animal special diets, hand-processing, curing and cooking techniques coupled with maturation longer periods, makes for premium products with positive processing. Traditional meat innovation is also getting "lighter" in terms of fat, salt and preservatives content. Nitrite free is an emerging claim and conveys a healthier image to the product. Hybrids are the equilibrium between meat products and the growing trend of plant-based products.

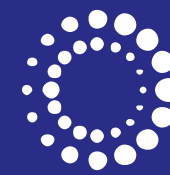
Packaging innovation

The growing concerns towards environment will continue to innovate the meat packaging industry. Less plastic and more alternative materials are increasingly seen in the market. Packaging design and sustainable materials have a growing importance to attract millennial's and gen z attention. Small details such as a different front-of-pack window or a resealable packaging will continue to develop to enhance the consumers' experiences.

*Free text search for: "artisanal" "hand made" "craft" "old-fashioned" "old style" "crafted".



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**Para qualquer questão e/ou feedback, por favor
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