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SHEEPMEAT

CONSUMPTION TRENDS IN EUROPE

Our panels are able to assess the purchases of

ORDINARY HOUSEHOLDS

(excluding students, associations, tourists)

for their **HOME CONSUMPTION**



OUR PANELS ARE REPRESENTATIVE SAMPLES OF THE POPULATION FOR EACH COUNTRY



30 000 Households



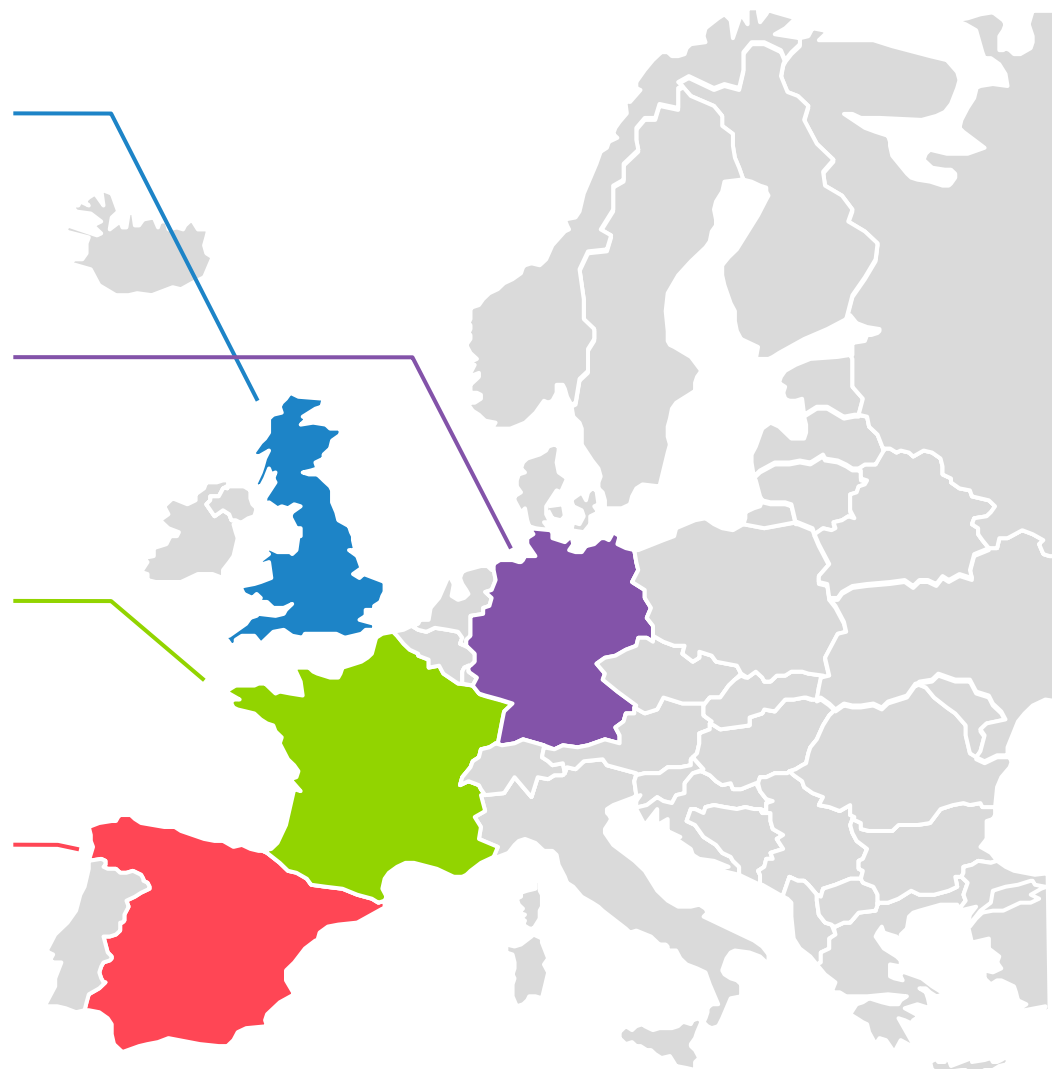
13 000 Households



12 000 Households



12 000 Households



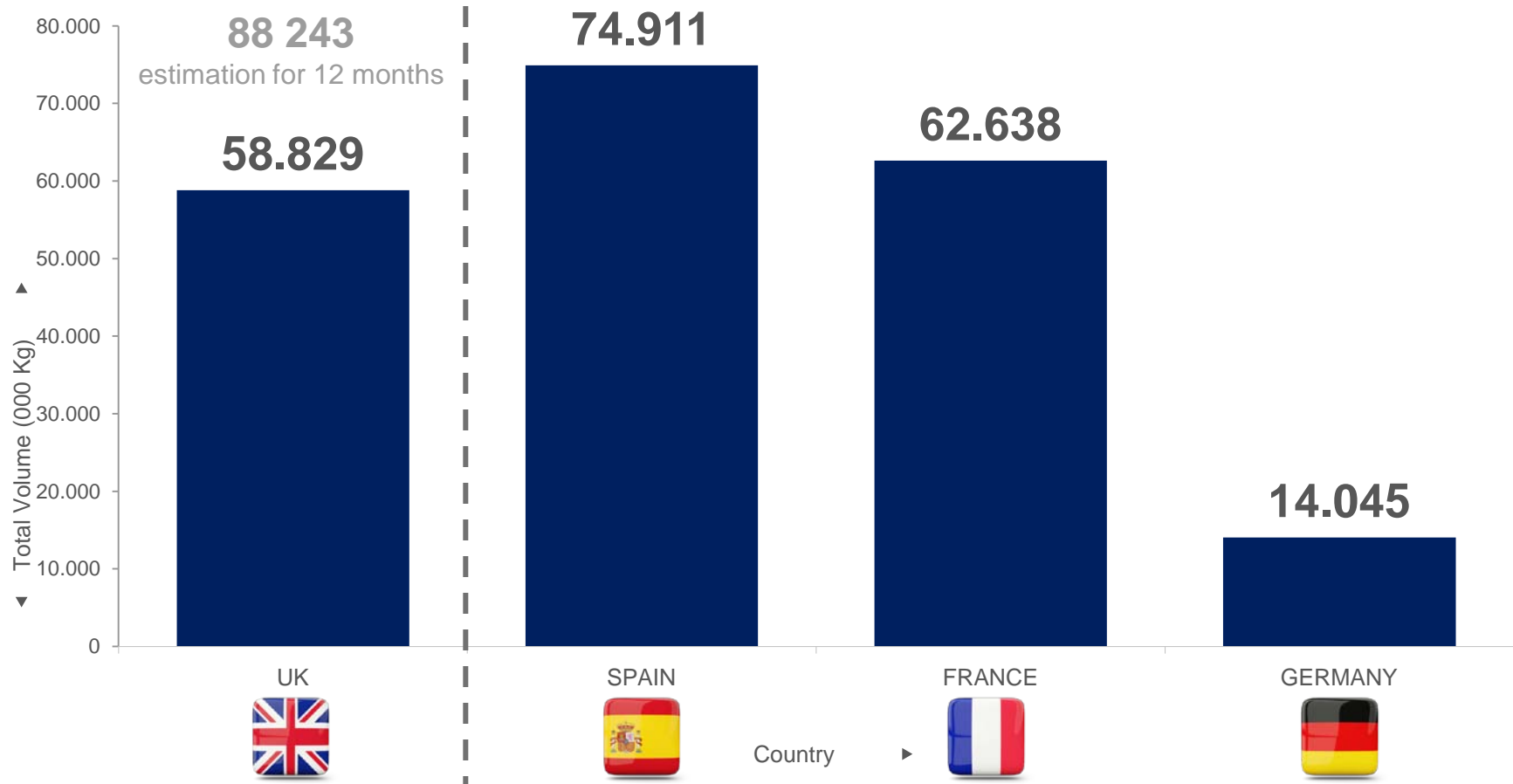
CURRENT SITUATION IN 2013

In 2013, UK households are the biggest consumers of Lamb meat

Total Volumes (000 Kg) per country

< 8 months data >

< 12 months data >



Source :

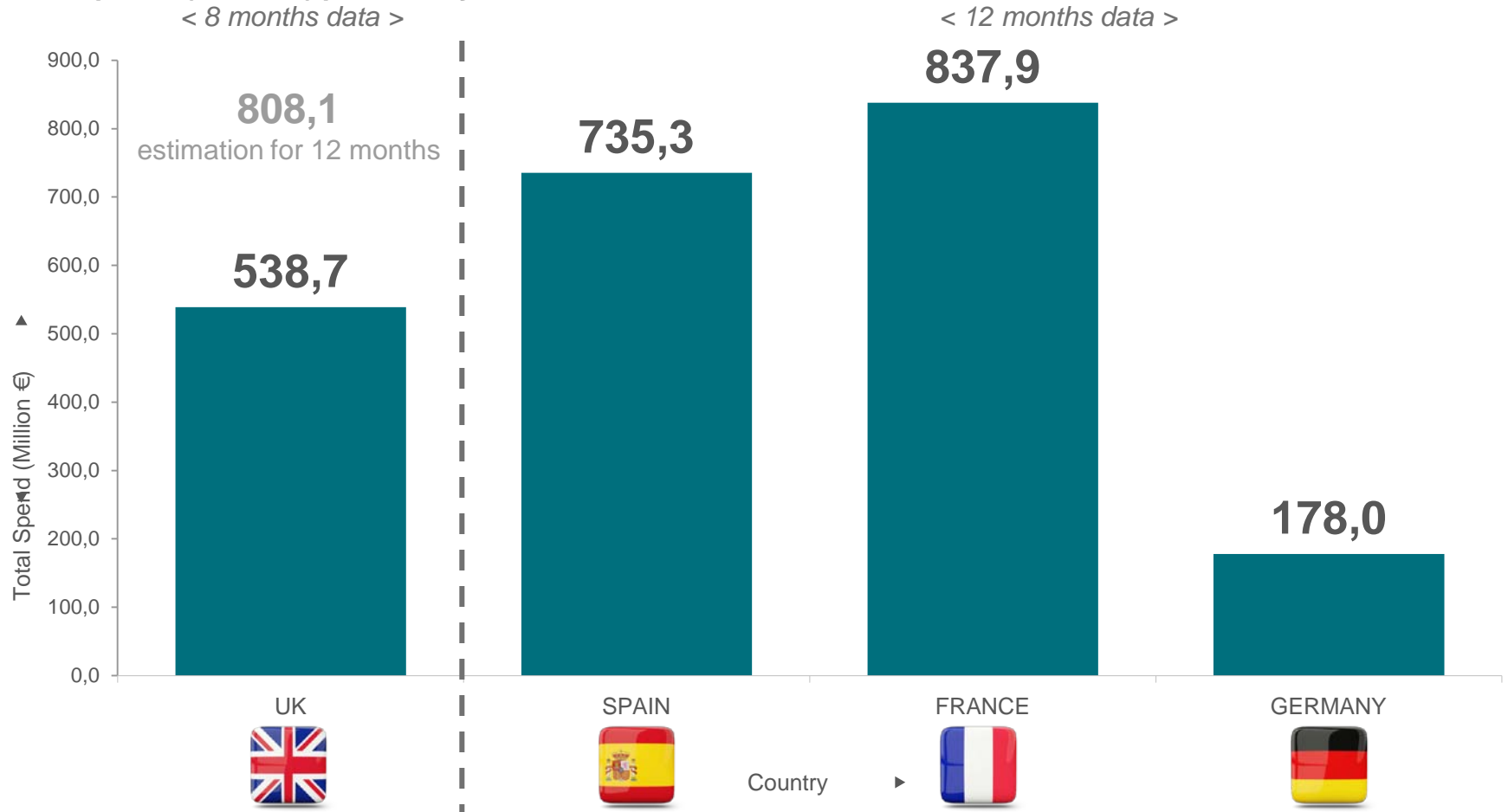
UK : AHDB/EBLEX/KANTAR – YTD ending September 15th 2013 – All Distribution Channels
Spain : KANTAR – MAT ending September 2nd 2013 – All Distribution Channels

France : KANTAR – MAT ending August 31st 2013 – All Distribution Channels
Germany : GfK – MAT ending August 1st 2013 – All Distribution Channels

But the total spends in France might be higher over a year

A higher average price paid by households in France vs other countries

Total Spends (Million €) per country



Source :

UK : AHDB/EBLEX/KANTAR – YTD ending September 15th 2013 – All Distribution Channels
SPAIN : KANTAR – MAT ending September 2nd 2013 – All Distribution Channels

FRANCE : KANTAR – MAT ending August 31st 2013 – All Distribution Channels
GERMANY : GFK – MAT ending August 1st 2013 – All Distribution Channels

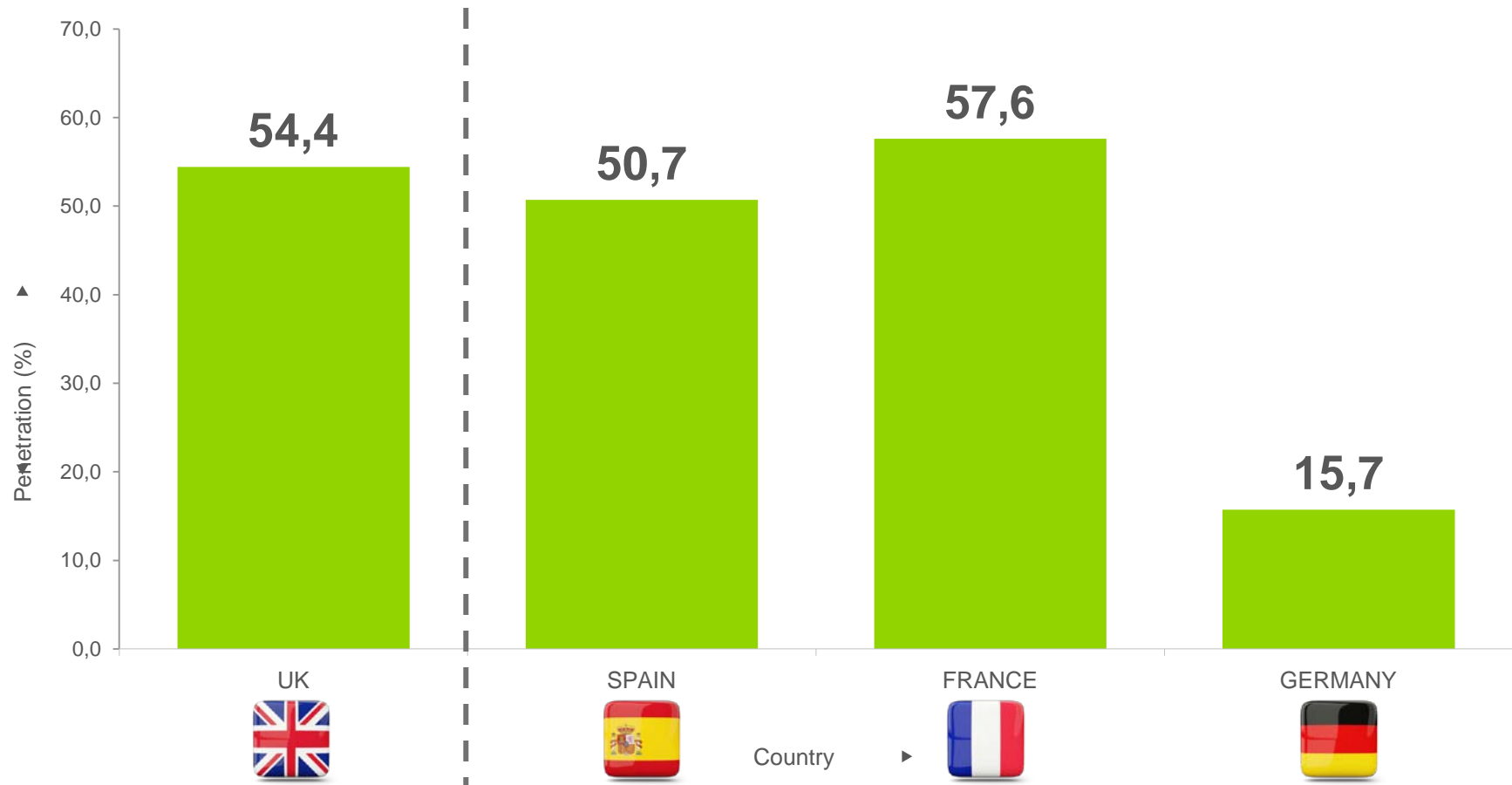
Consumption of Lamb meat is clearly not in German culture

→ Only 15,7% of German households buy lamb meat

Penetration (%) per country : Percentage of buyers households amongst population

< 8 months data >

< 12 months data >



Source :

UK : AHDB/EBLEX/KANTAR – YTD ending September 15th 2013 – All Distribution Channels
SPAIN : KANTAR – MAT ending September 2nd 2013 – All Distribution Channels

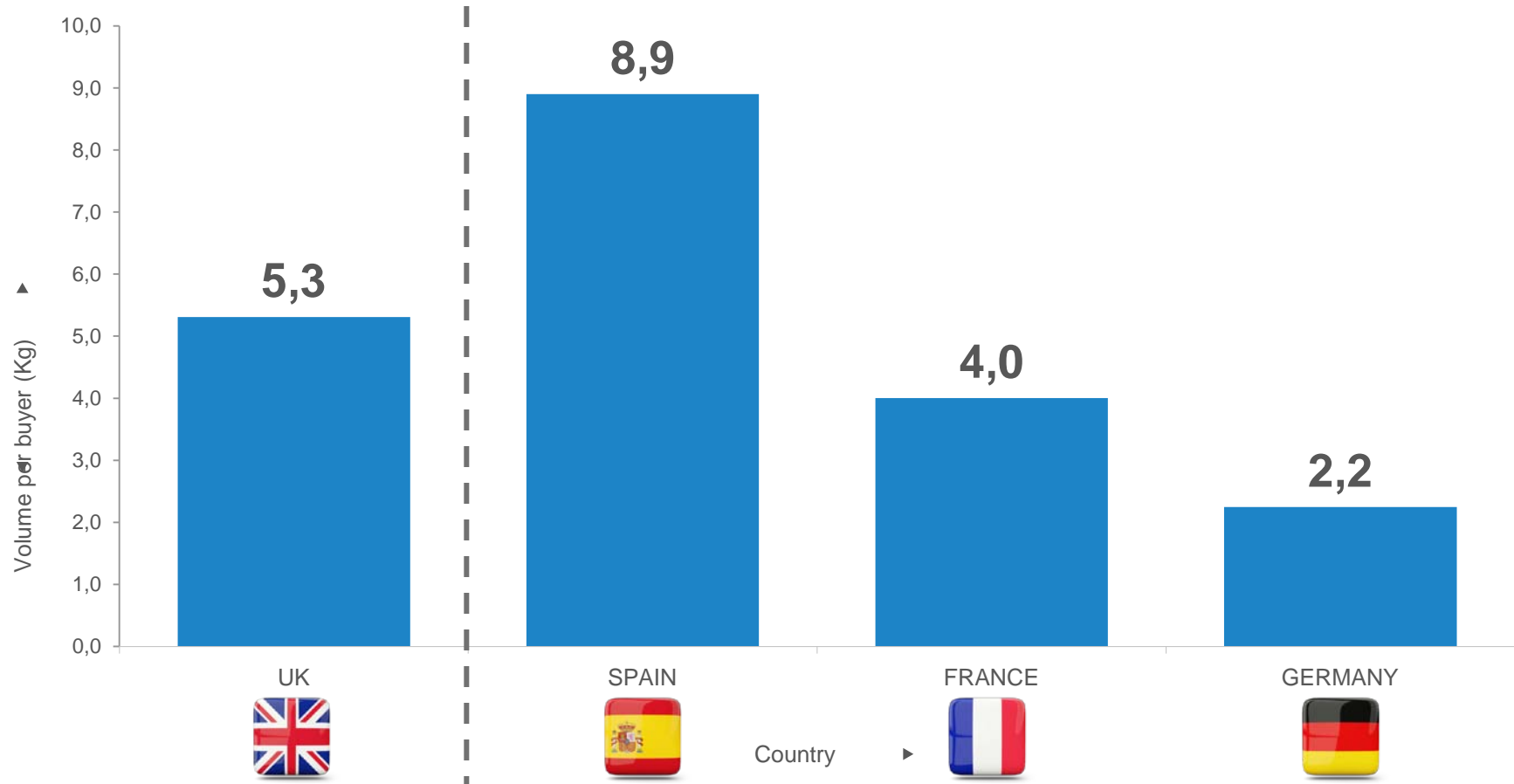
FRANCE : KANTAR – MAT ending August 31st 2013 – All Distribution Channels
GERMANY : GFK – MAT ending August 1st 2013 – All Distribution Channels

Despite fewer buyers in Spain vs France & UK, the spanish households are heavy buyers of lamb

Volumes per buyer (Kg) per country

< 8 months data >

< 12 months data >



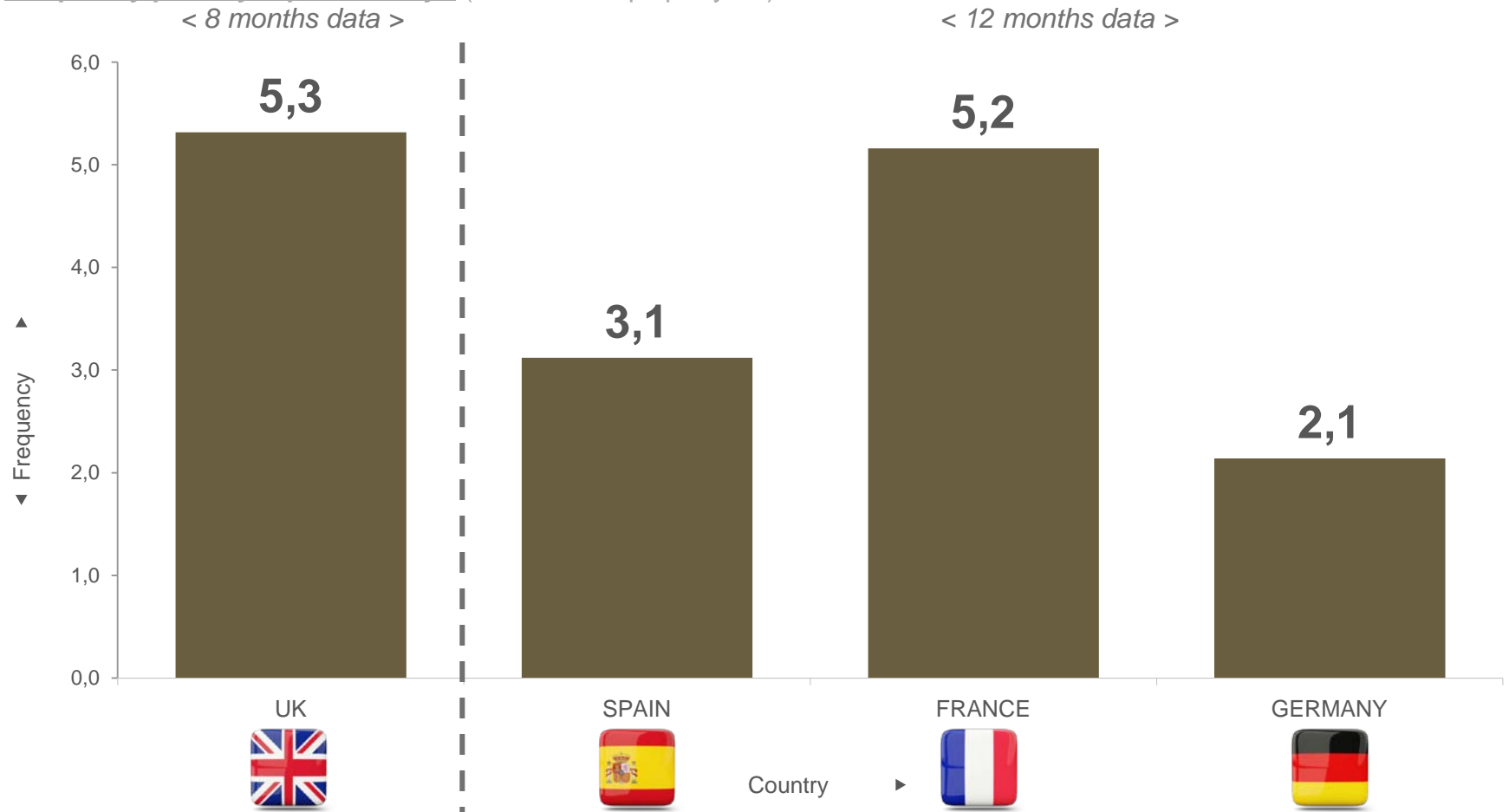
Source :

UK : AHDB/EBLEX/KANTAR – YTD ending September 15th 2013 – All Distribution Channels
SPAIN : KANTAR – MAT ending September 2nd 2013 – All Distribution Channels

FRANCE : KANTAR – MAT ending August 31st 2013 – All Distribution Channels
GERMANY : GFK – MAT ending August 1st 2013 – All Distribution Channels

But their purchases are not as regular as in France and UK however

Frequency per buyer per country : (number of trips per year)



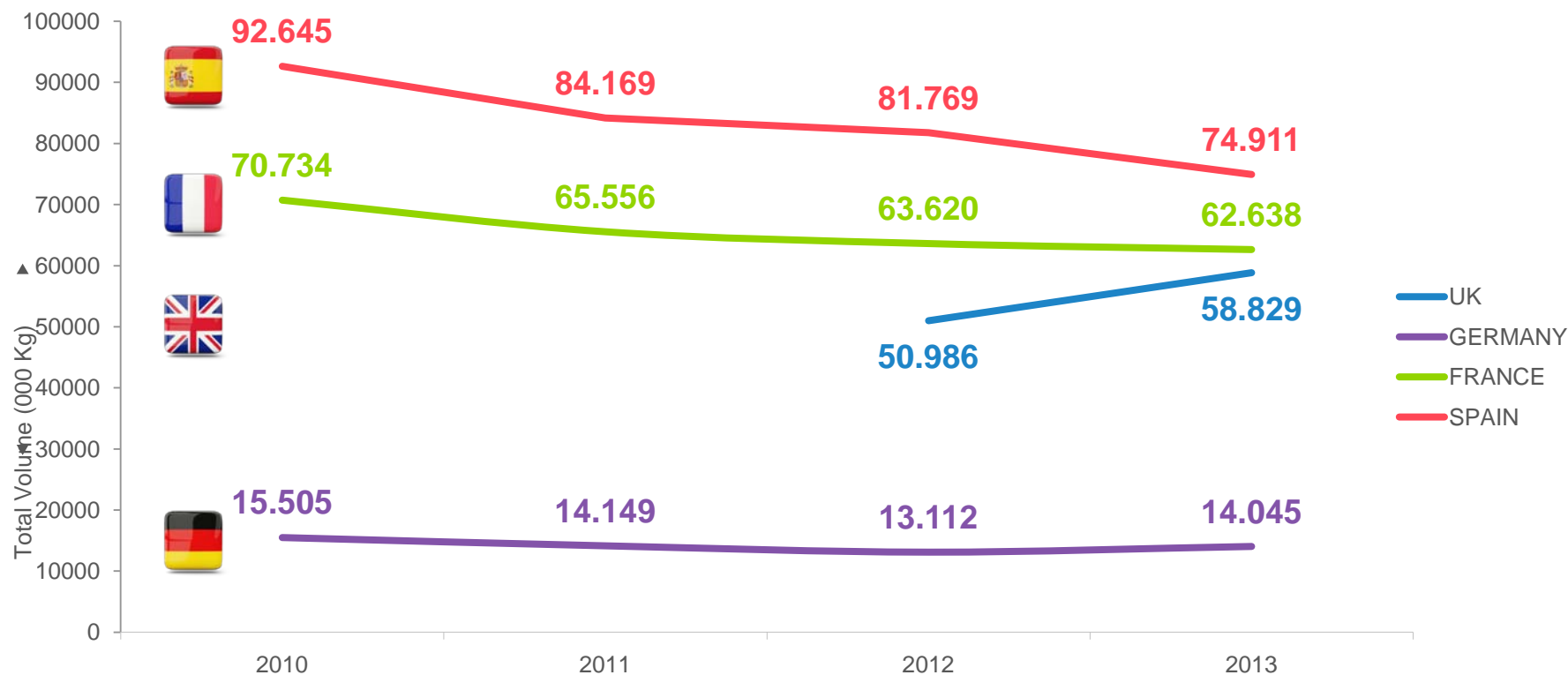
Source :

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GERMANY : GFK – MAT ending August 1st 2013 – All Distribution Channels

EVOLUTION OVER THE LAST 4 YEARS

A counterflow trend for Lamb volume purchases in UK vs France & Spain



Source :
 UK : AHDB/EBLEX/KANTAR – YTD ending September 15th 2013 – All Distribution Channels
 SPAIN : KANTAR – MAT ending September 2nd 2013 – All Distribution Channels

FRANCE : KANTAR – MAT ending August 31st 2013 – All Distribution Channels
 GERMANY : GFK – MAT ending August 1st 2013 – All Distribution Channels

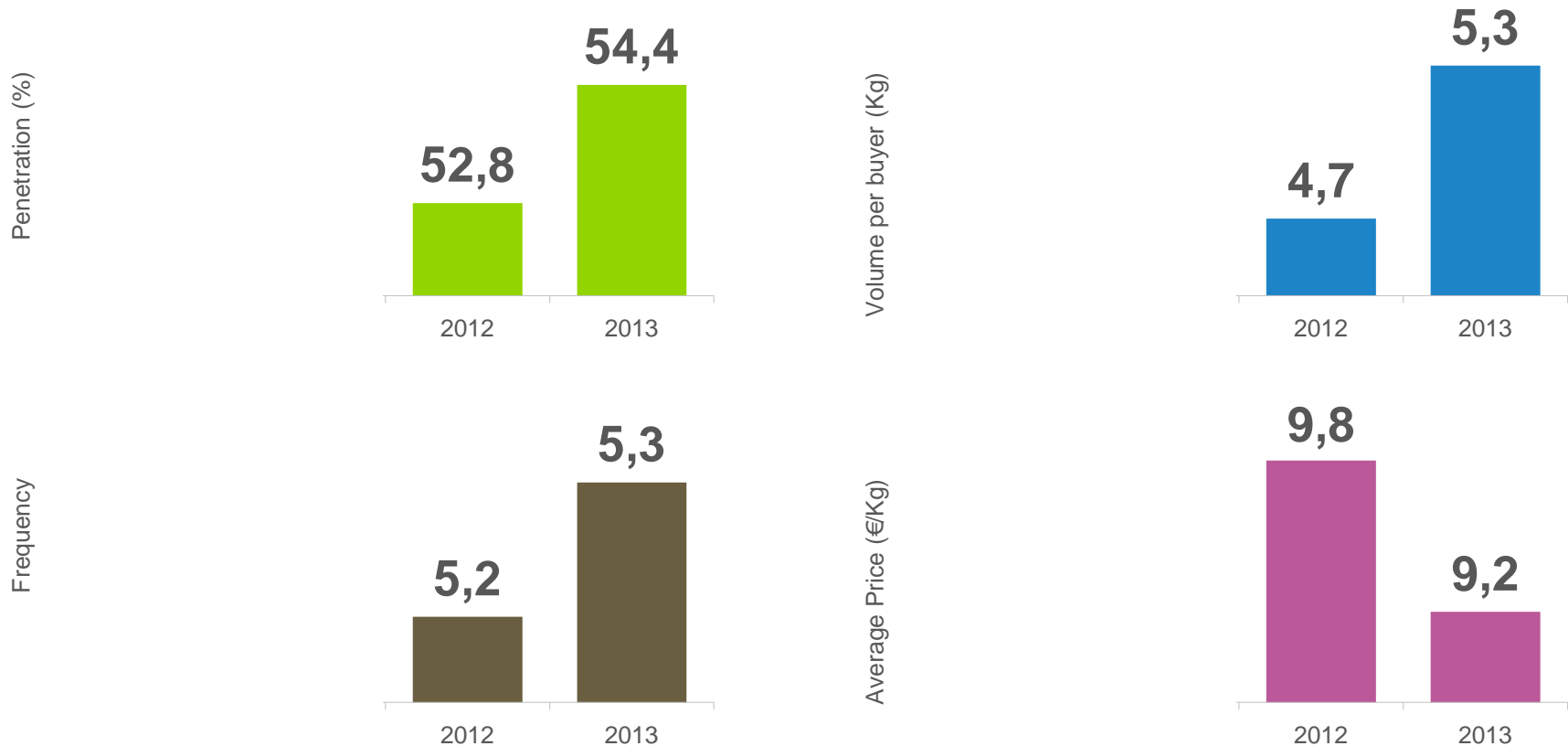
In UK : More buyers in 2013 and an increase of their annual purchases

Probably influenced by a decreasing price



Consumption trends : UK

Year to date 2012 to 2013 (January to September)



Source :
UK : AHDB/EBLEX/KANTAR – Year To Date data (YTD) ending September 15th 2013 vs 2012 – All Distribution Channels

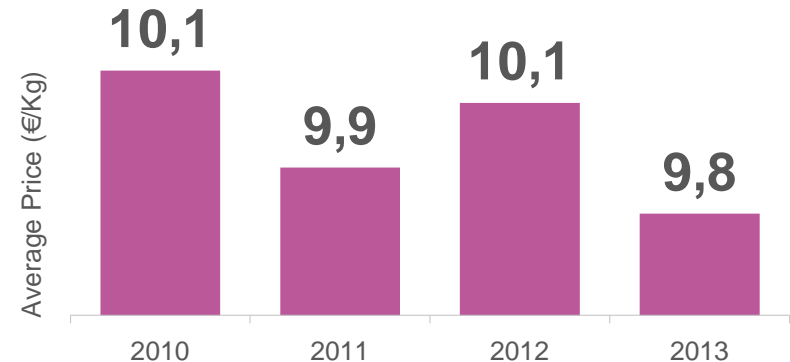
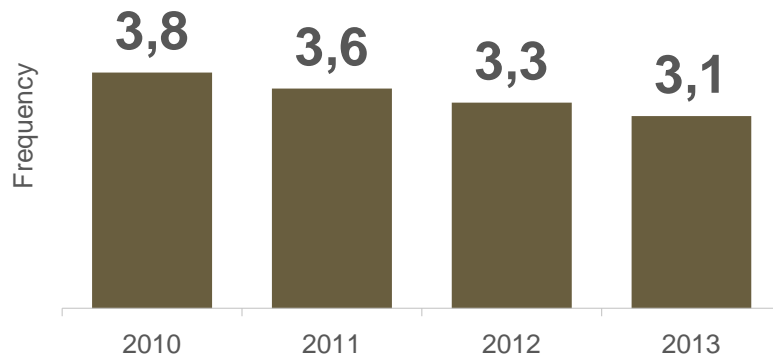
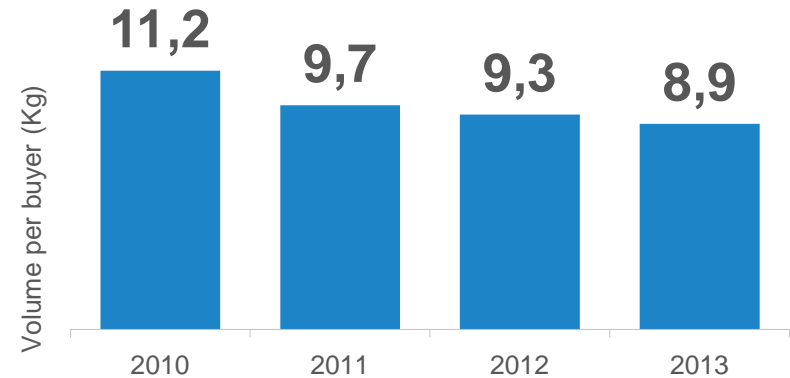
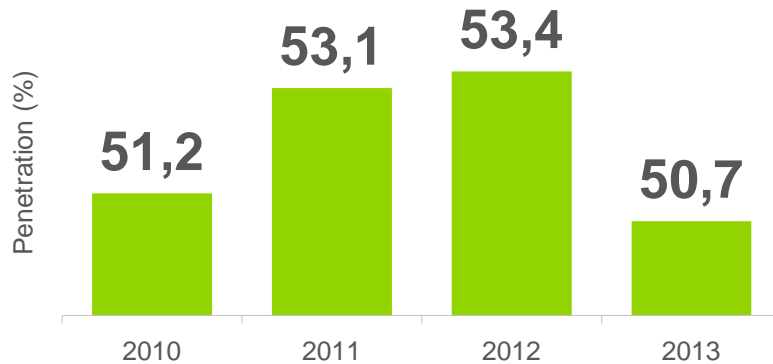
In SPAIN : Less buyers in 2013, despite a declining average price

Lamb meat penetration falls back to its 2010 level



Consumption trends : SPAIN

Moving Annual Total 2010 to 2013 (September to August)



Source :
SPAIN : KANTAR – Moving Annual Total data (MAT) ending September 2nd 2013 vs 2012 vs 2011 vs 2010 – All Distribution Channels

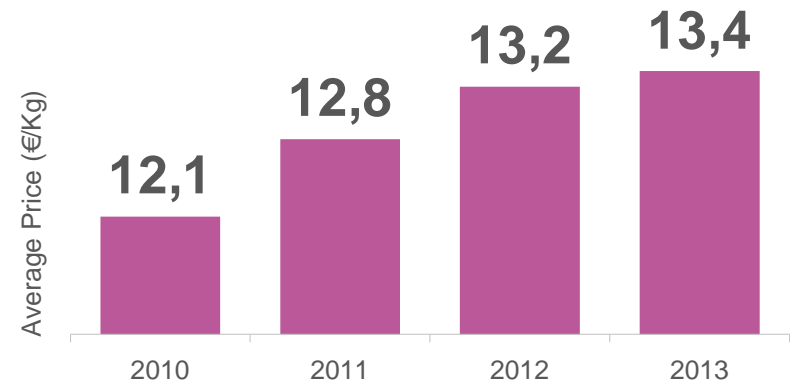
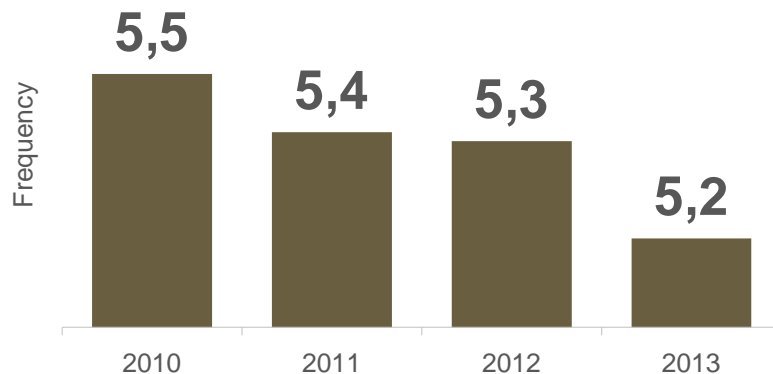
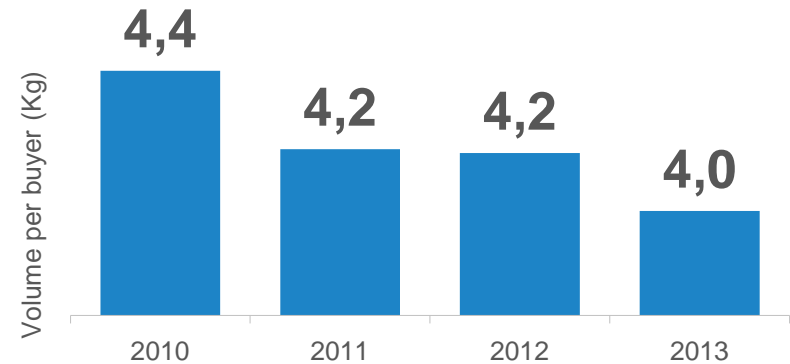
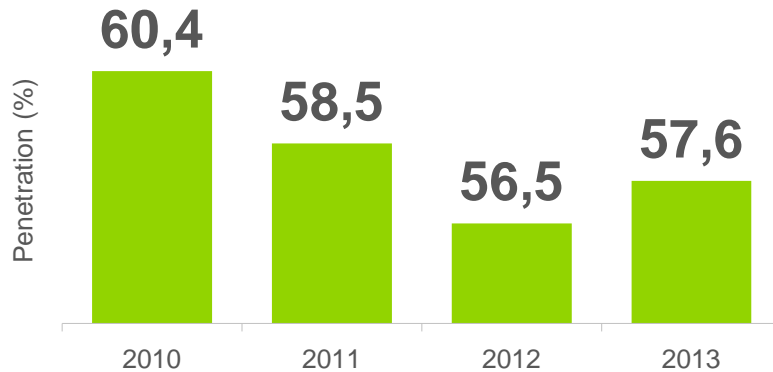
In FRANCE : After many years of penetration decline, more buyers in 2013

But still a slight decrease of frequency and average volumes per buyer



Consumption trends : FRANCE

Moving Annual Total 2010 to 2013 (September to August)



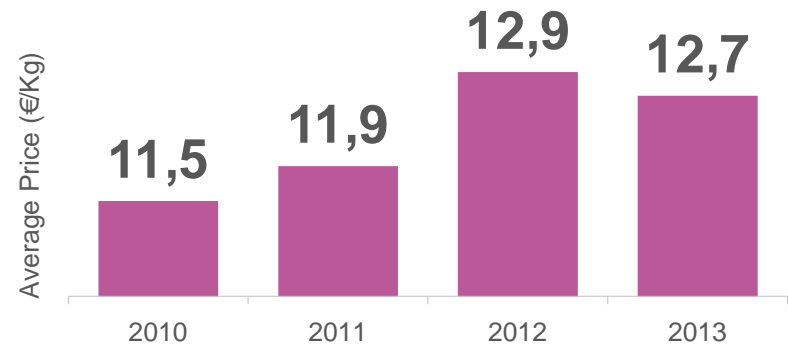
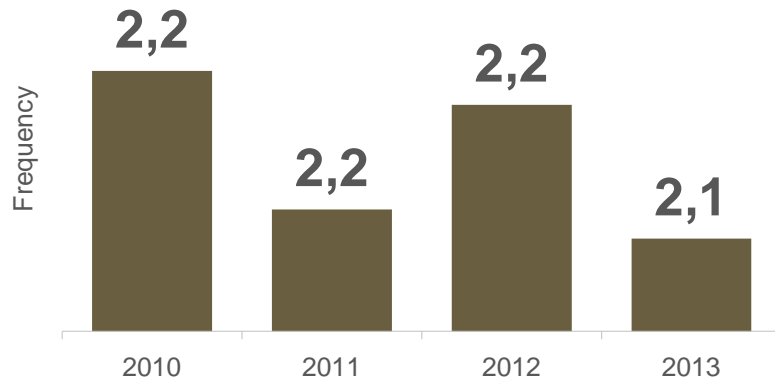
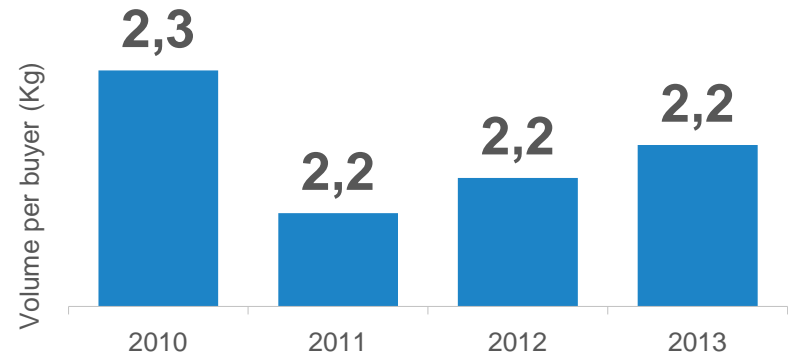
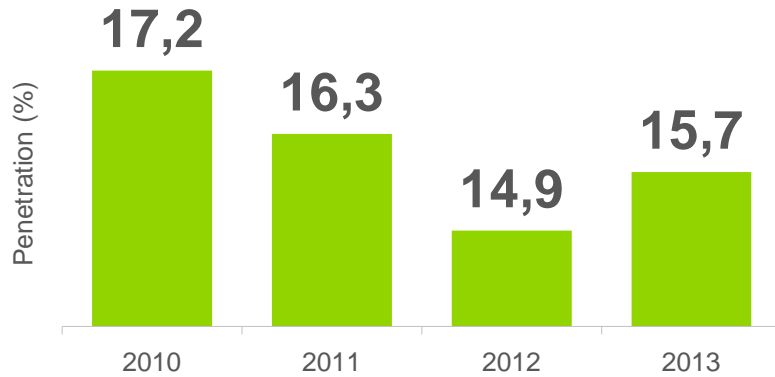
Source :
FRANCE : KANTAR – Moving Annual Total data (MAT) ending August 31st 2013 vs 2012 vs 2011 vs 2010 – All Distribution Channels

In GERMANY : return to a higher penetration in 2013 after a regular decline

The increase of the average price in 2012, which probably caused the loss of buyers, has been stopped

Consumption trends : GERMANY

Moving Annual Total 2010 to 2013 (September to August)



Source :
GERMANY : GfK – Moving Annual Total data (MAT) ending August 1st 2013 vs 2012 vs 2011 vs 2010 – All Distribution Channels