THE SPANISH MEAT SECTOR:

AN OVERVIEW OF THE MEAT INDUSTRY AT NATIONAL AND INTERNATIONAL LEVEL

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WHO ARE WE?

The Business Federation of Meat and Meat Industries (FECIC) was established in 1978 in order to provide service and support to meat companies, in all their productive activities, in order to improve their competitiveness.

At FECIC we are specialized in providing advanced technical services in quality, food safety and export through the innovation and experience of its technical team. Currently, we work with companies dedicated to all productive activities, such as slaughter, cutting, processing of meat or by-products and, finally, the production of processed meat products.



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COLLABORATIVE ORGANIZATIONS

Among the functions of FECIC, it is worth mentioning the defense and representation of the business activity of the sector and its affiliated companies before the different administrations, highlighting the information and services we offer to meat companies.

CÓDIGO DE BUENAS PRÁCTICAS EN LA CONTRATACIÓN ALIMENTARIA

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CONSUMPTION IN SPAIN, IN THE EU AND IN THE WORLD

PIGMEAT: SPAIN CONSUMPTION

EVOLUTION OF CONSUMPTION OF FRESH AND PROCESSED PORK IN SPANISH HOUSEHOLDS (TONNES)

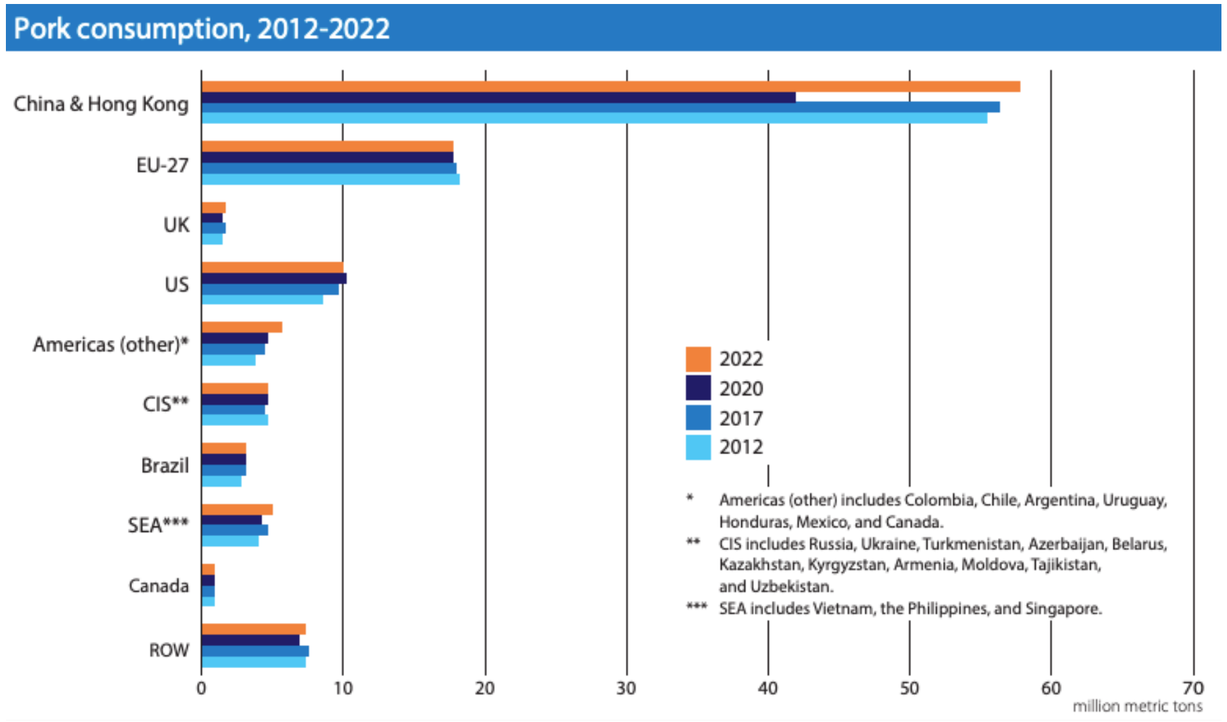


Source: Ministry of Agriculture, Fisheries and Food of Spain (MAPA)

The data for 2022 maintain the downward trend in pork consumption, which began a few years ago, with a significant decrease in the consumption of fresh pig meat (-10.3%), accompanied by a parallel decrease in the consumption of processed meat (8.7%), compared to the figures for 2021.

However, household consumption of fresh pigmeat amounted to about 446.5 million kilograms in 2021.

PIGMEAT: EU CONSUMPTION

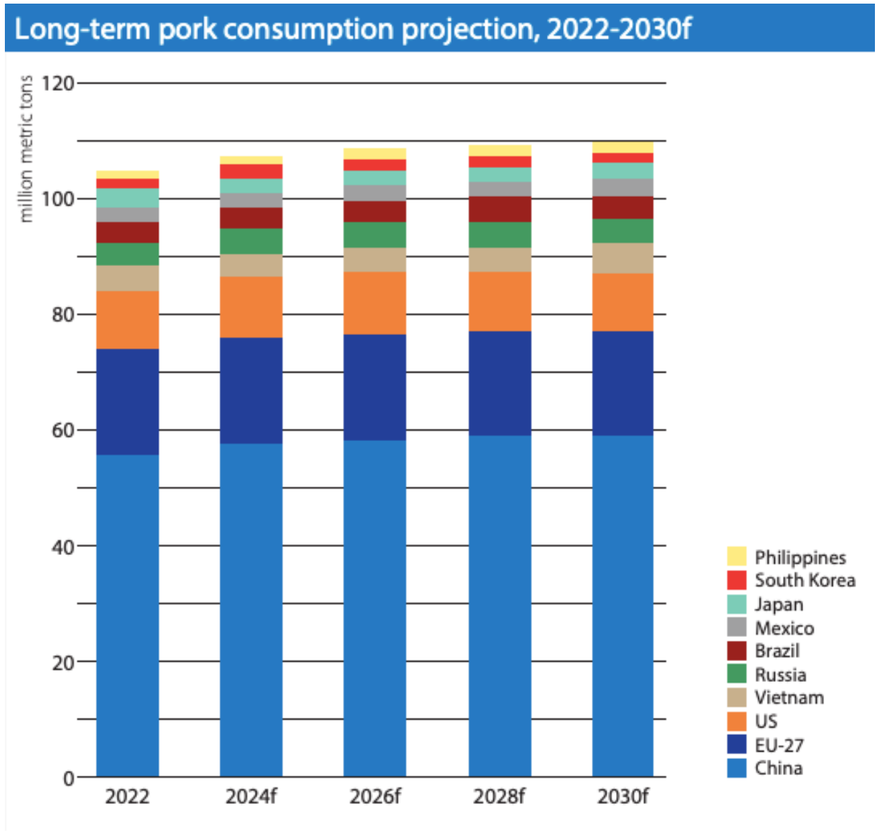


Source: Rabobank

Pigmeat, maintaining a position of relative stability in terms of price, suffering a small reduction in the EU over time, but continuing to be a popular choice on consumers' tables.

China and Hong Kong are positioned as the largest consumers of pork, followed by the EU-27 itself, and with forecast to continue growing next year.

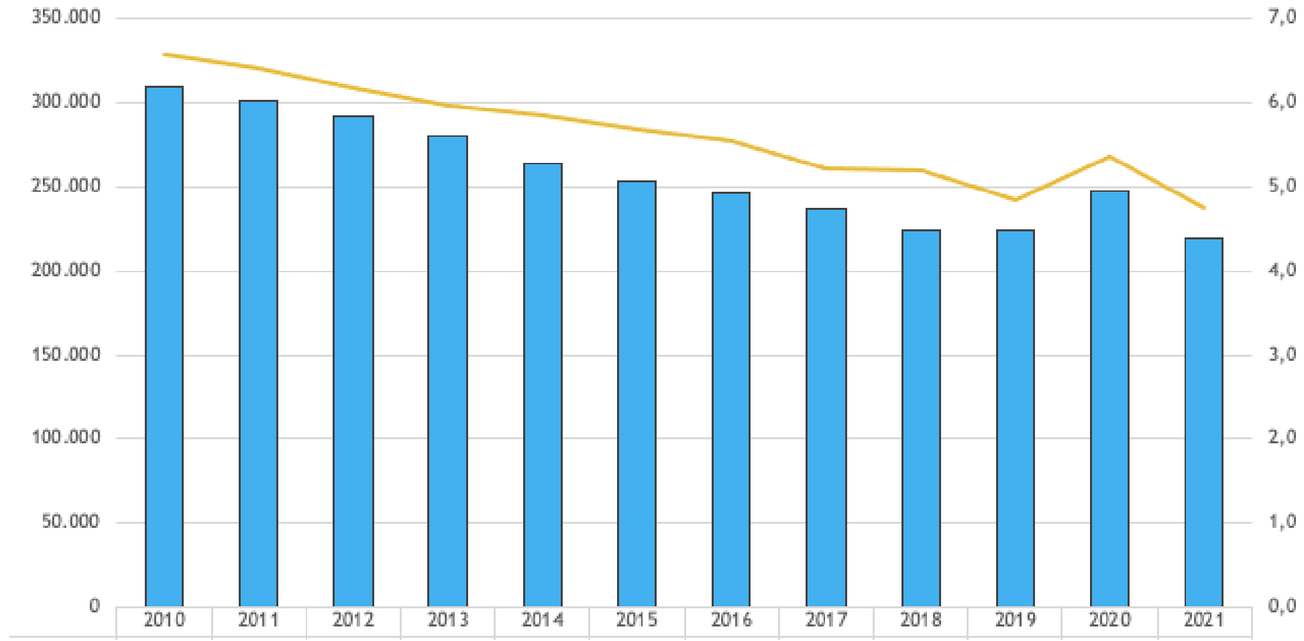
PIGMEAT: WORLD CONSUMPTION



Source: Rabobank

Pigmeat consumption forecasts estimate that China will remain the largest consumer of pigmeat, followed by the EU-27 itself and the United States.

BEEF: SPAIN CONSUMPTION



Source: Ministry of Agriculture, Fisheries and Food of Spain (MAPA)

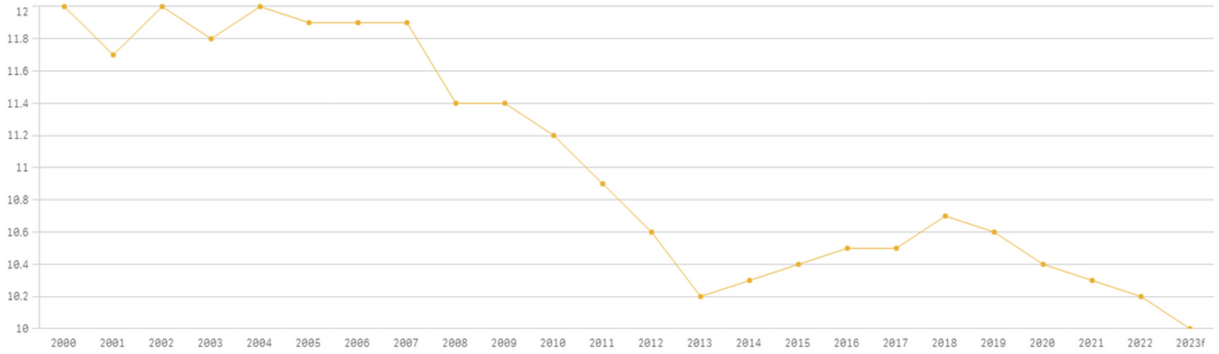
Beef consumption falls by more than 19% in 2022 in Spain. The consumption of fresh beef in Spanish households has fallen by 19.3% in 2022, compared to 2021, reaching 177,344 tons.



Therefore, internal consumption (national/European) does not guarantee the growth or profitability of the sector.

BEEF: EU CONSUMPTION

PER CAPITA CONSUMPTION OF BEEF IN EU



Source: European Comission

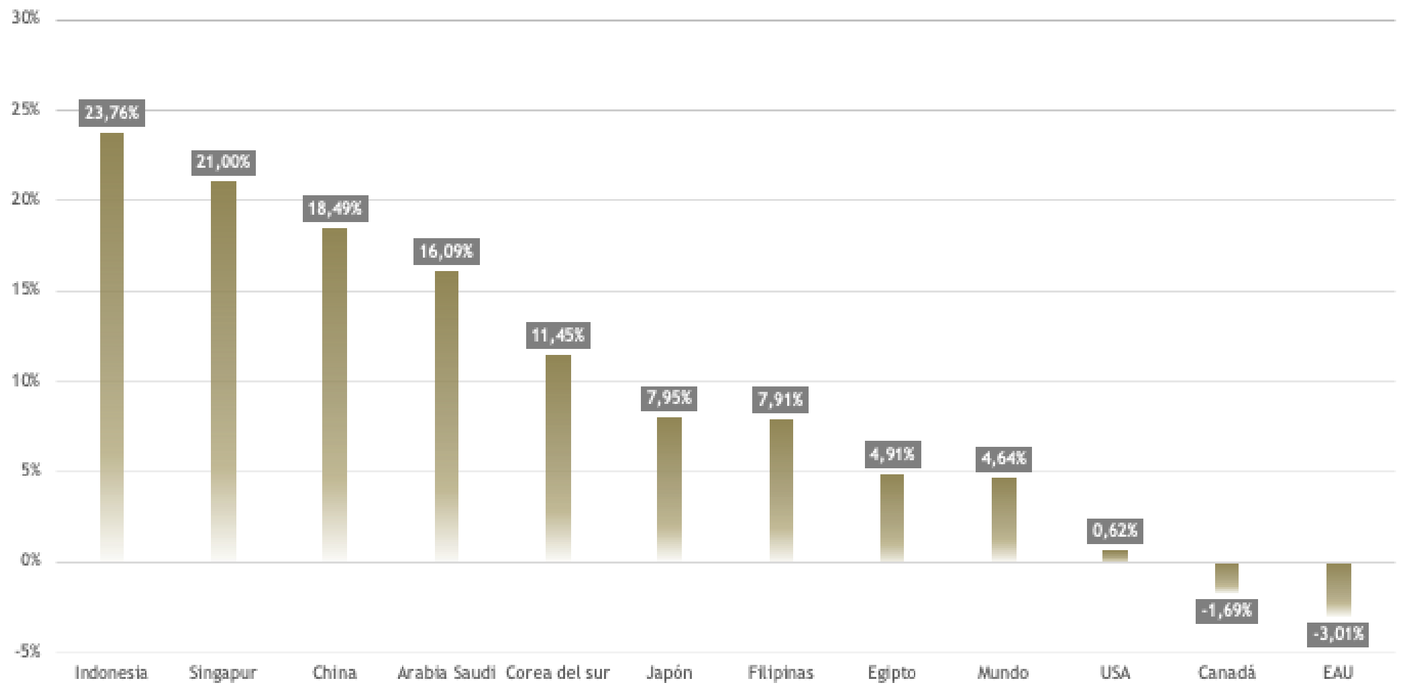
Significant decline in per capita beef consumption in the EU, which generally decreases every year.



Spain is the country in the EU where more meat is consumed, with 98.79kg per inhabitant per year. Portugal is second on the list.

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EVOLUTION OF BEEF CONSUMPTION BY COUNTRY (2017-2022)

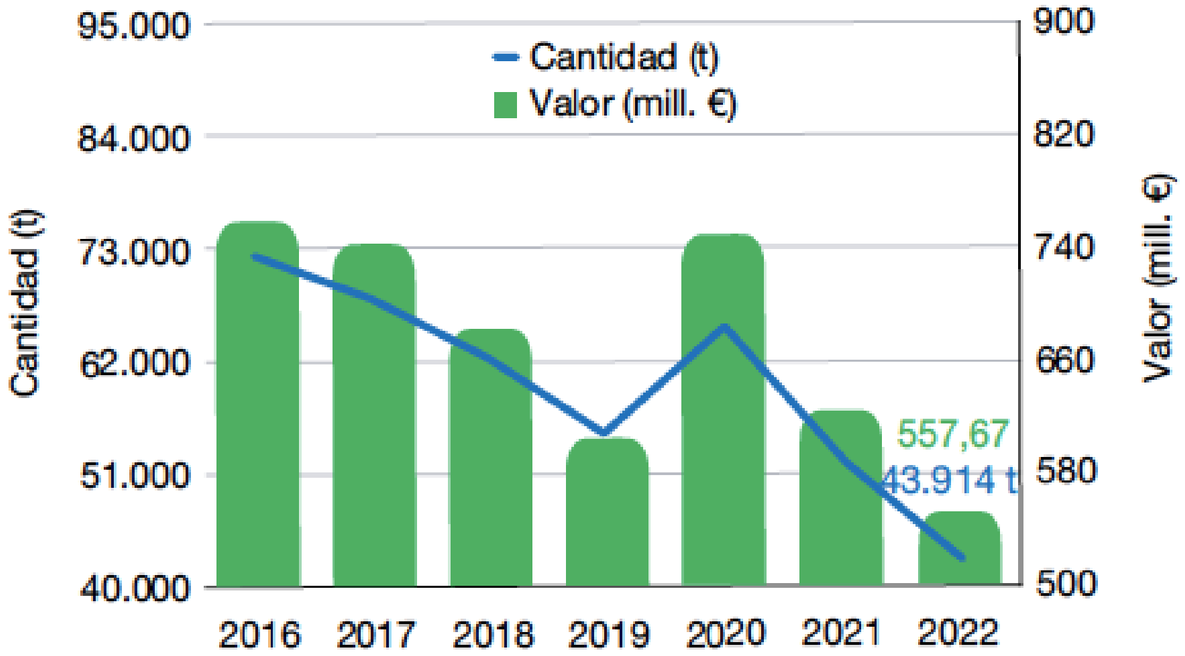


Increase in beef consumption in Asian and Arab markets, in addition to the fact that the type of meat "grain fed" is highly valued in Asian markets.

Source: PROVACUNO

SHEEPMEAT: SPAIN CONSUMPTION

EVOLUTION OF SHEEP MEAT CONSUMPTION IN HOUSEHOLDS

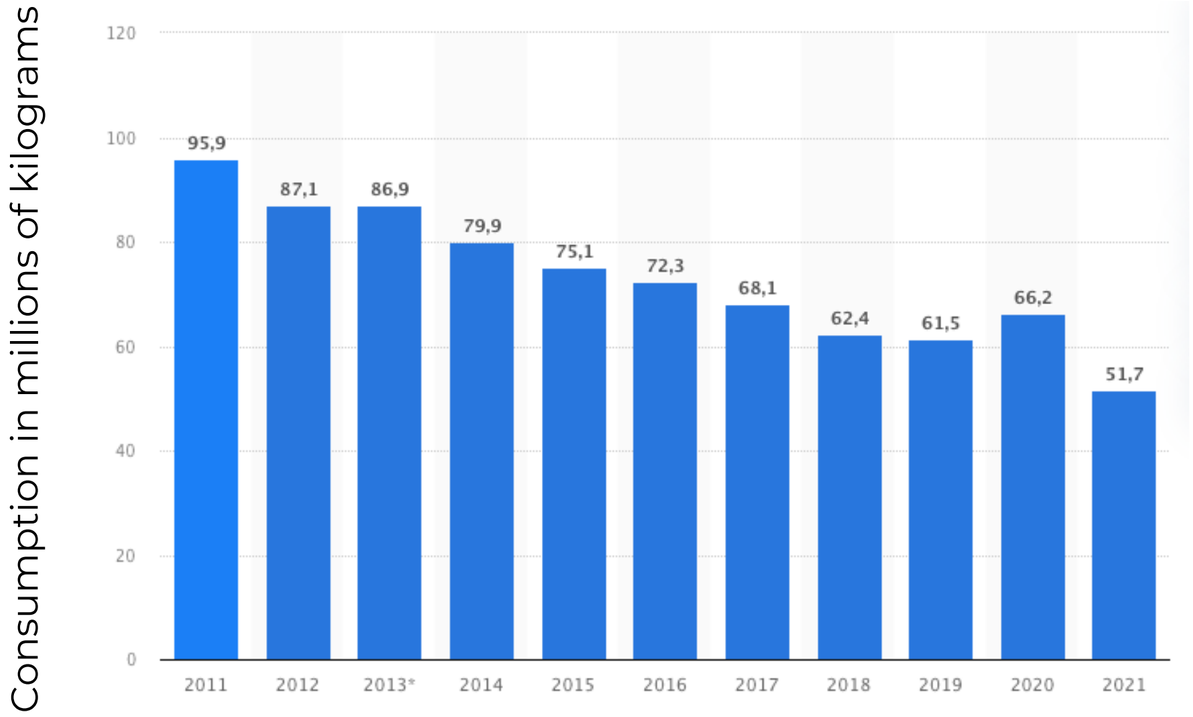


Source: Eurocarne

Sheep meat consumption per capita reached 0.93kg last year, presenting a variation in household consumption between 2021 and 2022 of -36.7%.

7 were the quality marks of sheep meat registered in Spain during 2022.

EVOLUTION OF THE CONSUMPTION OF FRESH SHEEP AND GOAT MEAT IN SPANISH HOUSEHOLDS BETWEEN 2011 AND 2021

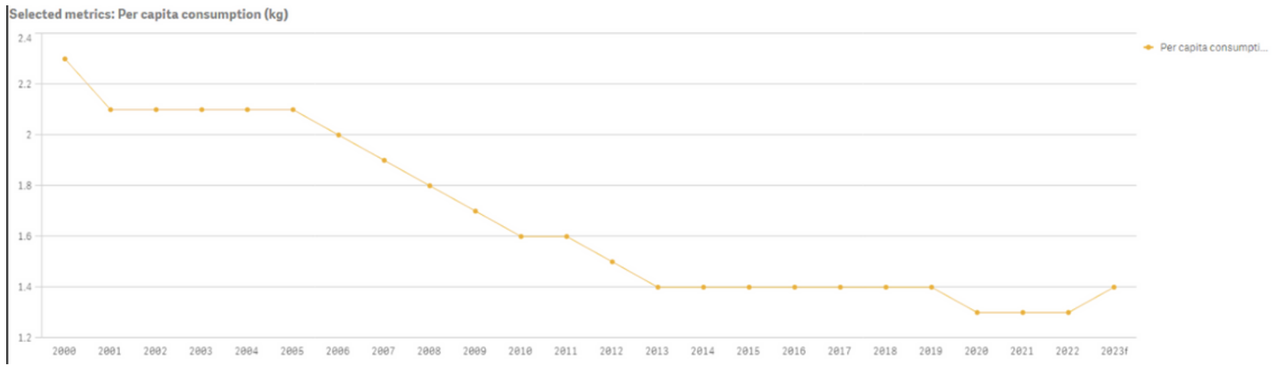


Source: Statista

Sheep consumption has been decreasing in Spain during this century, focusing on very specific times related to festivities and religious celebrations.

SHEEPMEAT: EU/WORLD CONSUMPTION

PER CAPITA CONSUMPTION OF SHEEPMEAT IN EU



Source: European Comission

World sheep consumption in 2020 per capita was 2.0kg, with Mongolia being the largest consumer.

The largest consumers of sheep meat are outside Europe, including Iceland, Bahrain and Turkmenistan.

Overall reduction in sheepmeat consumption in the EU

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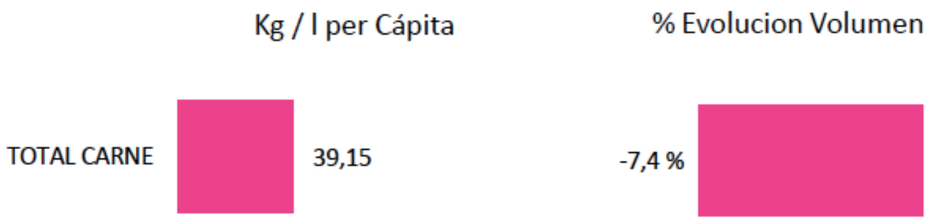
GENERAL MEAT CONSUMPTION IN SPAIN

LA ALIMENTACIÓN MES A MES TAM ABRIL 23 HOGARES							
Productos	Cantidad (Millones de kg / l)		Evolución	Valor (Millones de €)		Evolución	Kg / l per Cápita
	TAM ABRIL 22	TAM ABRIL 23	% 23 vs 22	TAM ABRIL 22	TAM ABRIL 23	% 23 vs 22	TAM ABRIL 23
T.HUEVOS KGS	383,7	385,3	0,4 %	982,39	1.205,18	22,7 %	8,28
CARNE POLLO	527,8	505,8	-4,2 %	2.483,26	2.721,84	9,6 %	10,87
CARNE CERDO	428,7	399,4	-6,8 %	2.695,43	2.818,83	4,6 %	8,58
CARNE VACUNO	201,7	174,2	-13,6 %	2.056,77	2.025,97	-1,5 %	3,75
CARNE CONEJO	35,7	27,9	-21,9 %	244,98	220,26	-10,1 %	0,60
CARNE OVINO/CAPRINO	46,9	41,0	-12,7 %	593,83	558,45	-6,0 %	0,88
CARNE TRANSFORMADA	514,6	486,3	-5,5 %	4.940,87	5.055,66	2,3 %	10,45

Source: #alimentosdespaña (MAPA)

The most consumed meat in Spain from January to April of this year is, by quantity, poultry, with a total of 505.8 million kg, and by value processed meat, reaching € 5,055.66 million.

BEHAVIOUR PATTERNS OF SPANISH MEAT CONSUMERS



Source: #alimentosdespaña (MAPA)

The average meat consumption in Spain is 39.15kg per capita in 2023, where the volume has experienced a variation of -7.4%.

In 95% of the shopping basket of Spaniards there is meat and fresh products.

60% of Spaniards usually choose price as the main factor when buying meat.

32% of Spanish meat consumers want to know the origin of the product to buy

AFTER THIS ANALYSIS, WHAT CHALLENGES WILL THE MEAT SECTOR HAVE TO FACE IN SPAIN AND EUROPE?

ASPECTS OF CONSUMER CONCERN

- Animal welfare
- Climate change
- Animal diseases (such as ASF)
- Image of meat (Meat the facts)



THANK YOU!



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General Secretary

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