

Main trends in meat consumption in Europe

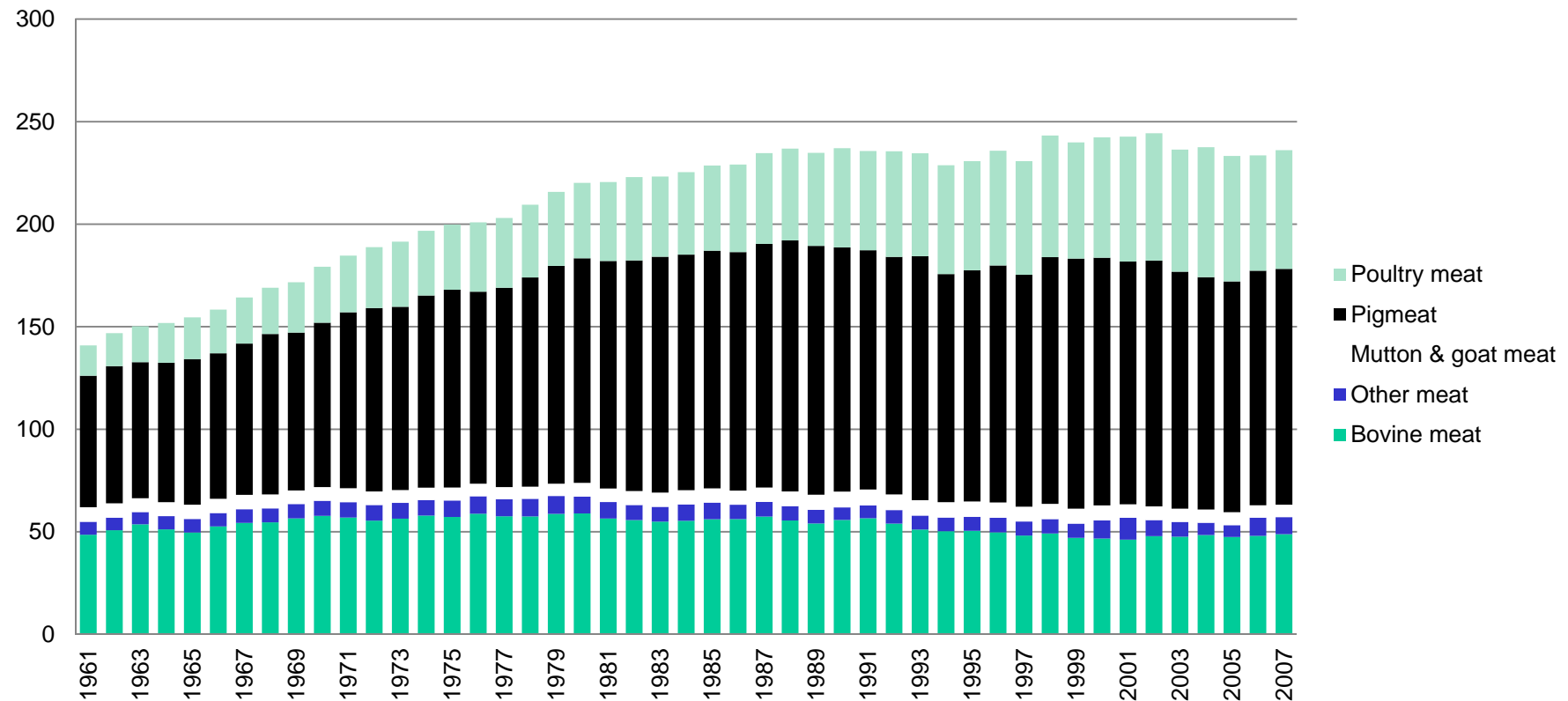
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6 July 2011

Outline

- Consumption trends over 50 years in group of eight EU countries
- Between production, supply and consumption
- Exploring relationships
 - Standard of living
 - Price of meat
 - Other social issues
- Conclusions
- References.

Trends – Per capita consumption

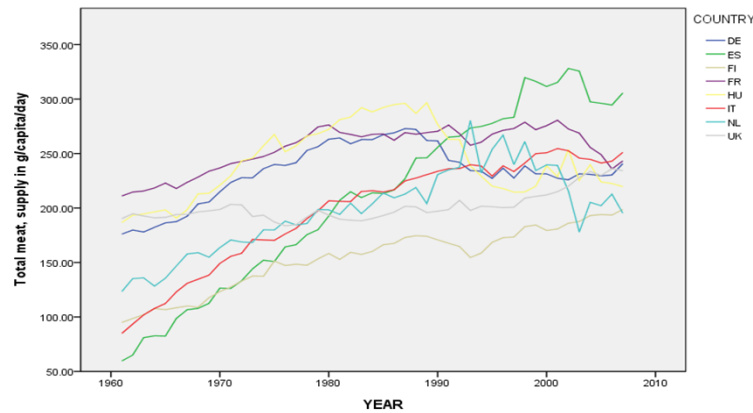
Per capita meat supply for group of 8 EU countries - Germany, France, Italy, Spain, UK, Netherlands, Hungary, Finland - in g/capita/day



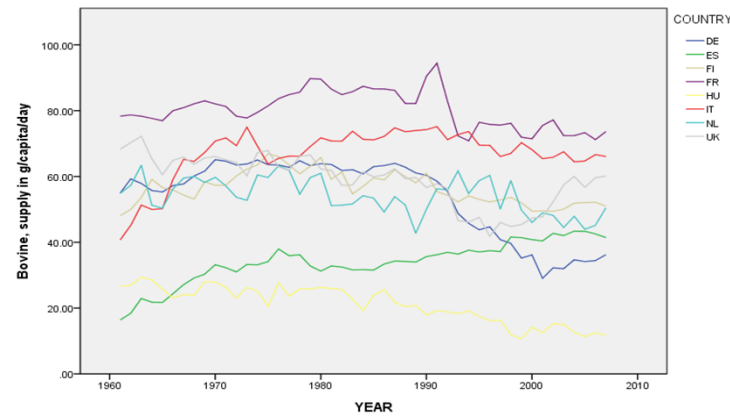
Source: FAO.

Trends – Per capita country consumption patterns - I

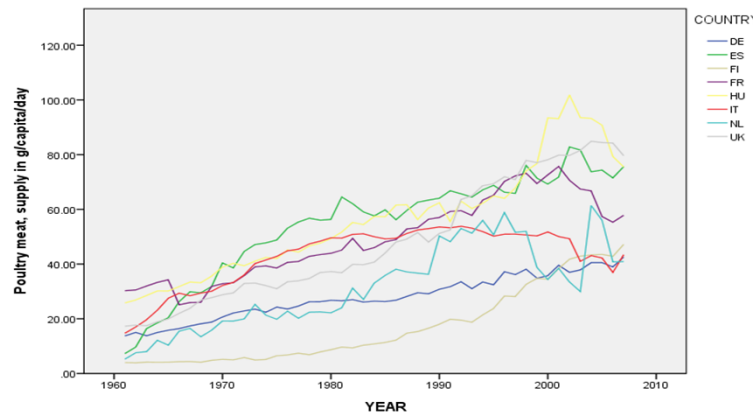
Total meat



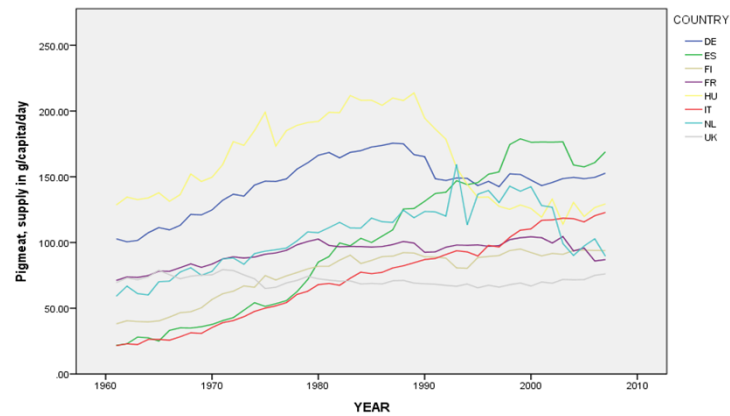
Bovine meat



Poultry meat



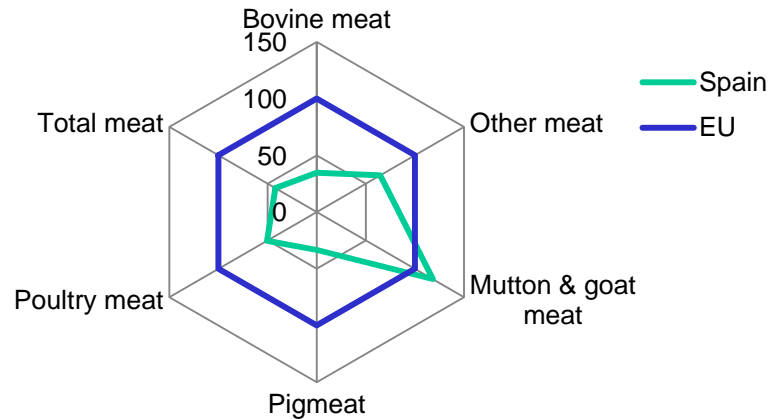
Pig meat



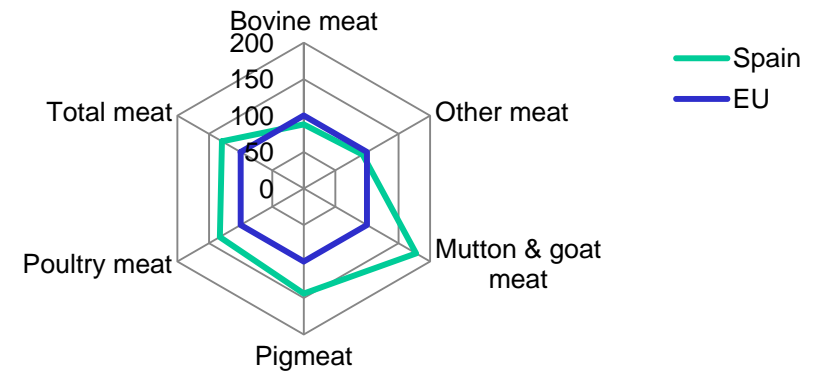
Source: FAO.

Trends – Per capita country consumption patterns - II

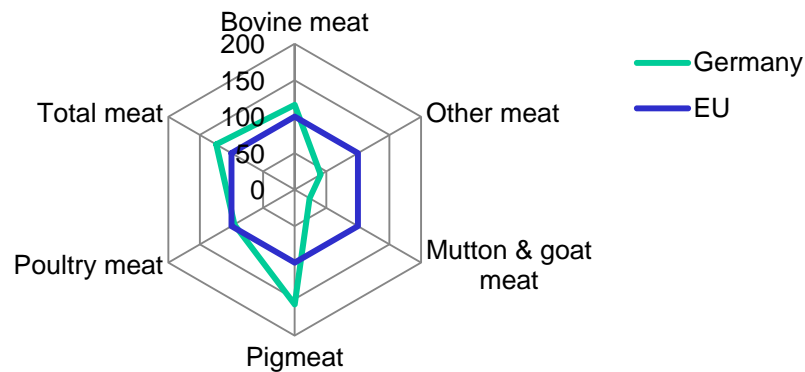
Meat supply in Spain in 1961 (% of EU average)



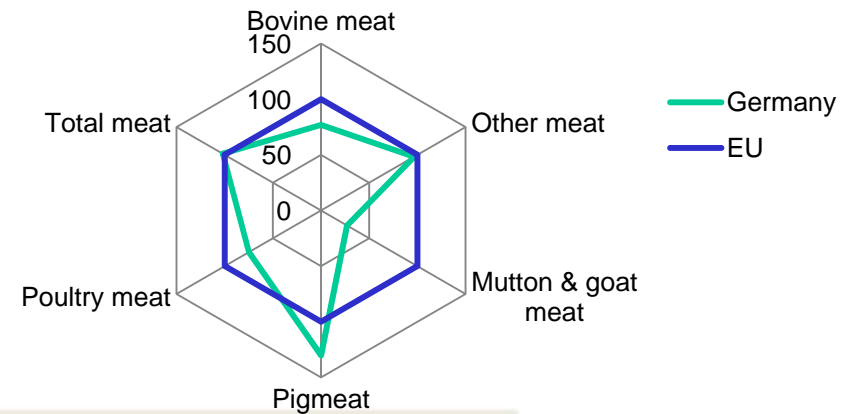
Meat supply in Spain in 2007 (% of EU average)



Meat supply in Germany in 1961 (% of EU average)



Meat supply in Germany in 2007 (% of EU average)



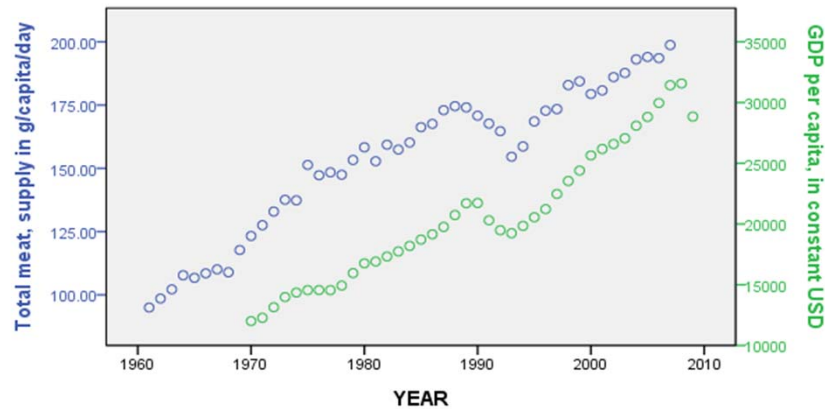
Source: FAO.

From chicken to fillet to garbage – Relationship between production, supply and consumption

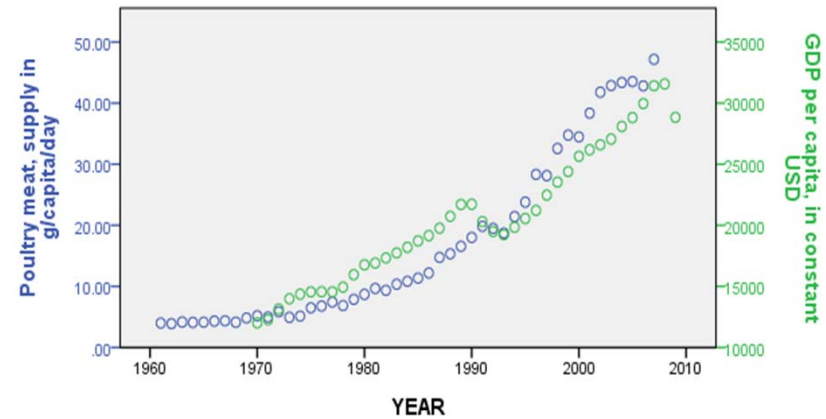
- Large data gaps exist as to how much food is lost/wasted, but FAO (2011) contains useful estimates of current situation
- About 1/3 of all food produced, and more than a 1/5 of meat, is lost/wasted globally -> for the industrial world, mostly at the end of the food supply chain
- ‘Losses’ in meat in Europe: production 3.1%, handling and storage 0.7%, processing and packaging 5%
- ‘Waste’ in meat in Europe: distribution 4%, consumption 11%
- FAO supply data takes estimates of food losses in production and processing into account, but it is unclear whether distribution losses are included -> actual consumption is probably about 11-15% less than the supply figures suggest.

Exploring – Standard of living

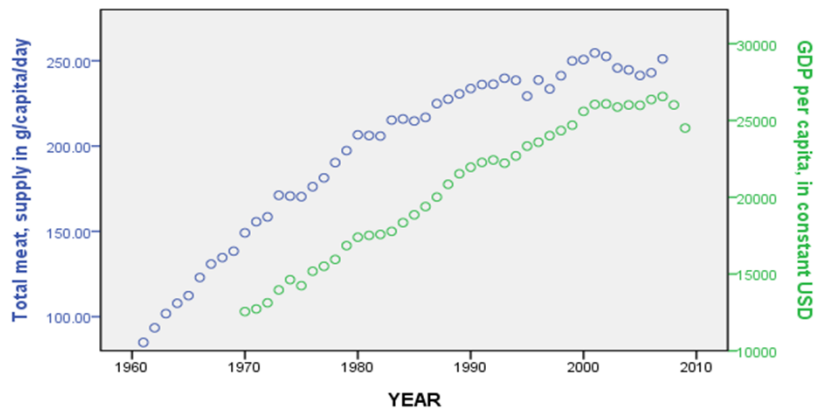
Finland – GDP per capita vs. total meat consumption



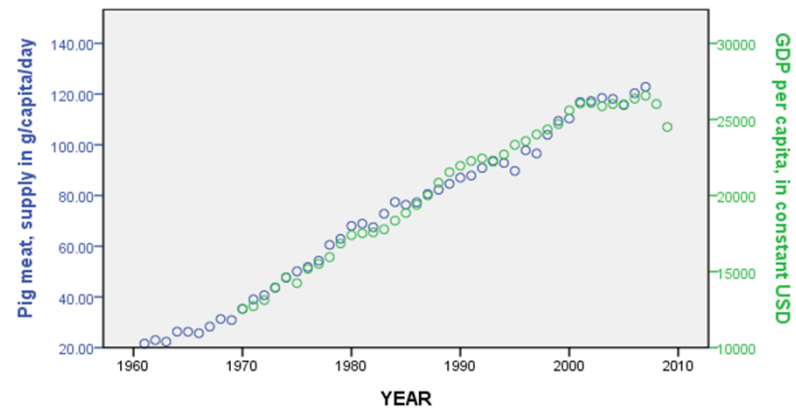
Finland – GDP per capita vs. poultry meat consumption



Italy – GDP per capita vs. total meat consumption

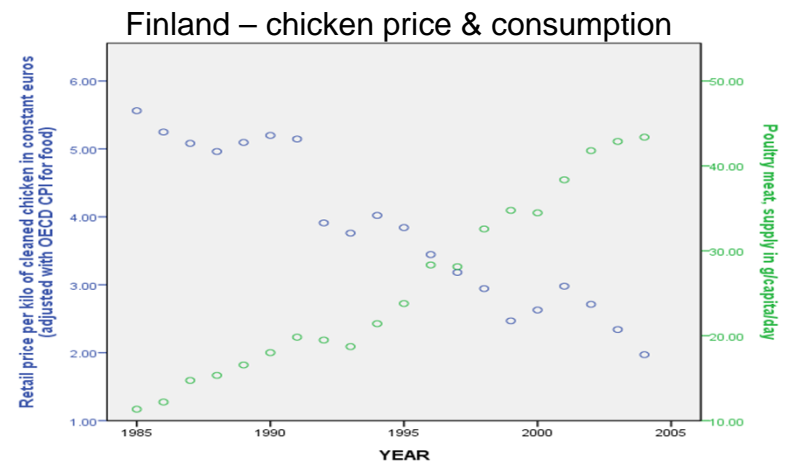
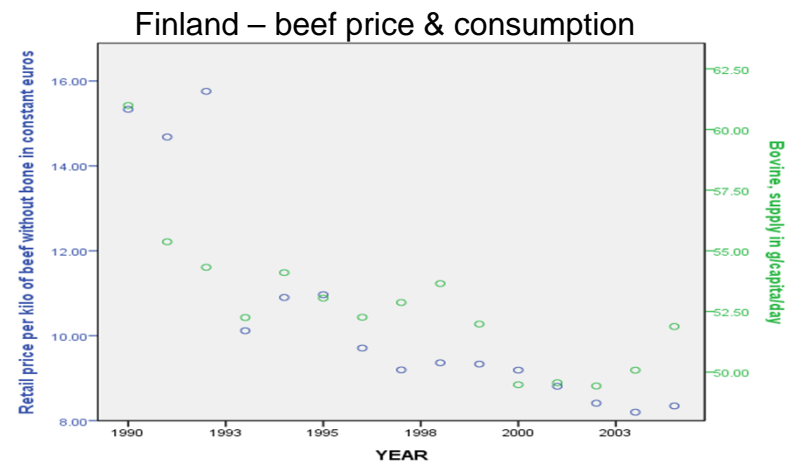
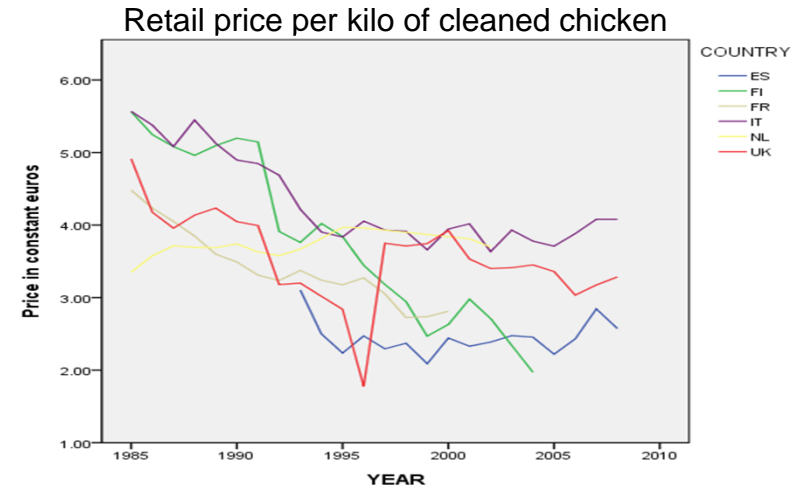
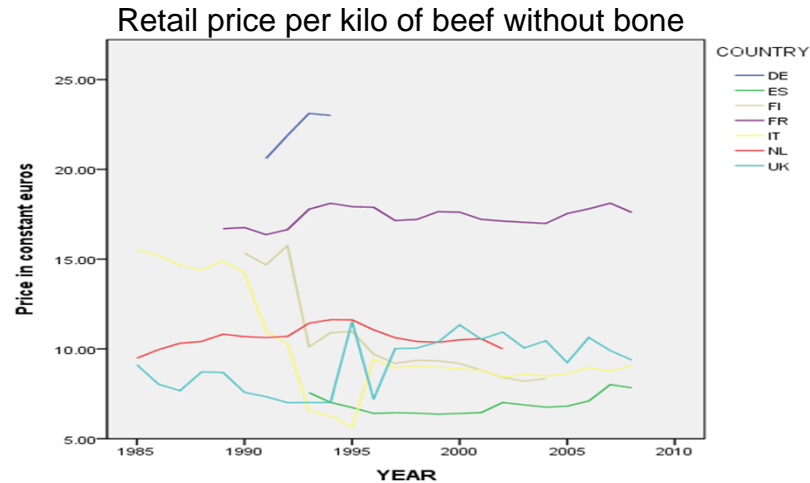


Italy – GDP per capita vs. pig meat consumption



Source: OECD, FAO.

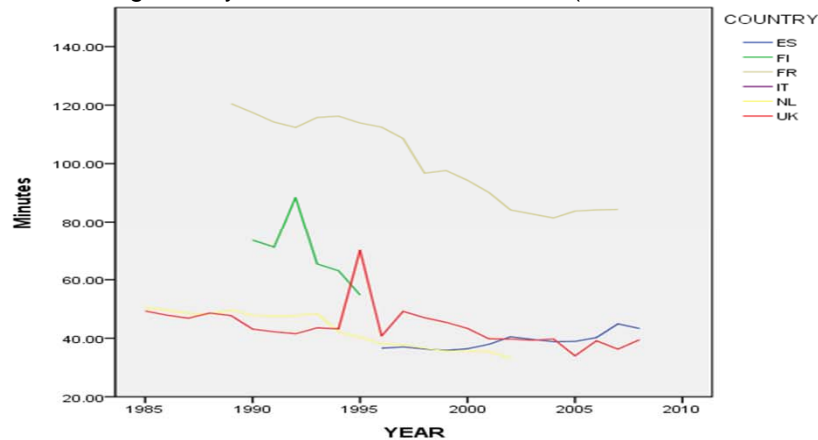
Exploring – Price of meat - I



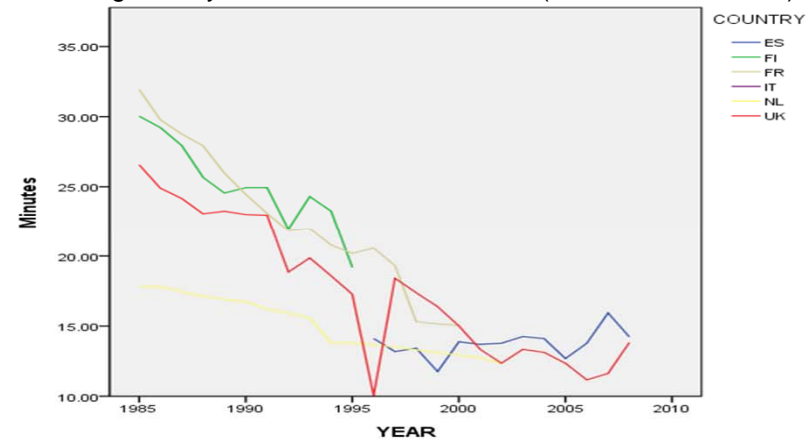
Sources: FAO, ILO and OECD.

Exploring – Price of meat - II

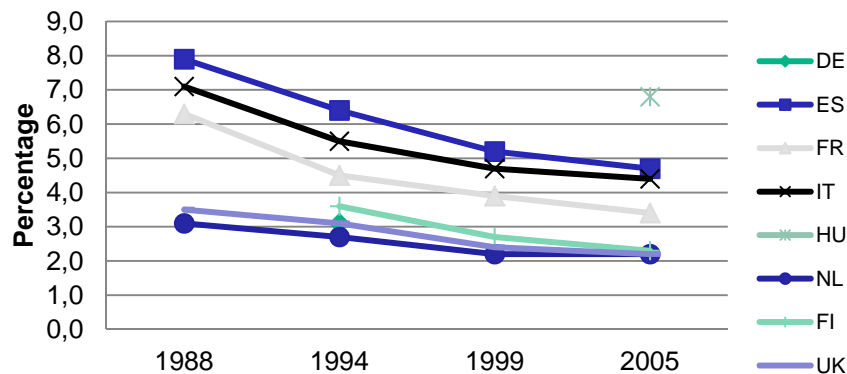
The amount of minutes an average worker has to work to earn enough to buy a **kilo of beef** without bone (no taxes considered)



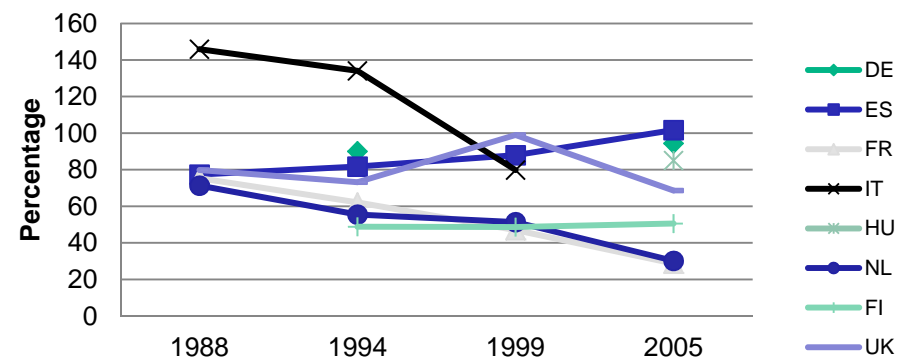
The amount of minutes an average worker has to work to earn enough to buy a **kilo of cleaned chicken** (no taxes considered)



Share of meat in all household consumption expenditure



Household expenditure on food
Lowest income 5th vs. highest income 5th



Sources: ILO, Eurostat and OECD.

Exploring – Other social issues

- What is a healthy diet?
 - E.g. ‘lipid hypothesis’ being questioned by some studies (e.g. Siri-Tarino, 2010). New ‘PUS’ in Finland: diets low in refined carbohydrates, and higher in fats, could be better for health as well as weight loss -> Meat consumption in Finland keeps rising, as people change their diets
 - Official dietary guidelines in Europe being adapted at the moment (see EUFIC, 2009), influence of Mediterranean diet (official in Greece)?
 - Dietary advice for weight loss/health from popular media (e.g. Brigitte)
- 1990’s - BSE crisis and worsening image of red meat in general: the impact of these two may not be separable; in many of the group of 8 countries, beef consumption started decreasing well before 1996; see also Morabia et al. (1999), Holm & Møhl (2000), Linseisen et al. (2002)
- Impact of meat industry advertisement (difficult to get data on expenses) on people’s consumption behaviour; industry influence on movies etc.

Conclusions

- **Per capita consumption trends for the group of 8 countries**
 - Total meat: UK is the country with most stable consumption (but a rise lately), Spain with fastest increase (from lowest to highest position, but levelling off lately?), Netherlands with the steepest decrease (in addition to Hungary); other countries with a clear decrease at some point: France (levelling off 1980's, falling in the 2000's), Germany (falling in the early 1990's, levelling off lately); lowest consumption at the moment in the group: Finland and NL (but rising for Finland, and falling for NL)
 - Specific meats: Overall levelling off or decrease for beef (except UK, Spain); overall increase for chicken (except Italy, France); different patterns for pork; stable consumption of sheep meat (except UK)
- **Overall impression on meat consumption levels** is that, on the one hand, big trends have a impact (increased living standards, industrialization of meat production, increased trade and industry influence, EU agricultural policies, globalization of 'Western' food culture), but, on the other hand, significant differences still exist among European countries, possibly due to other (social/cultural) differences
- **Investigating sustainability:** 1) what makes people reduce/not reduce meat consumption, or change from one meat to another, 2) how to reduce waste.

References

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Thank you for listening