



Processed Meat, Seafood and Alternatives to Meat in Western Europe

February 2022

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Western Europe has the highest sales and per capita consumption

CAGR of 1% expected for Western Europe over the forecast period

Italy adds the most new sales over 2016-2021

Chilled processed meat accounts for almost half of new sales

In spite of the pandemic sales spike, shelf stable meat is in decline

Healthier eating habits influencing sales and market trends

Modern grocery retailers dominate sales in Western Europe

E-commerce reaches double-digit shares in France and the UK

LEADING COMPANIES AND BRANDS

Private label accounts for nearly half of regional sales

Nomad Foods maintains its lead in the regional market

France a major revenue generator for many top 10 players

Only Herta and Fleury Michon hold regional shares of more than 1%

FORECAST PROJECTIONS

Frozen and shelf stable processed red meat sales expected to decline

Meat and seafood substitutes to see dynamic growth

Turkey will continue to be the most dynamic market in 2021-2026

COUNTRY SNAPSHOTS

Austria: Market Context

Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

Denmark: Market Context

Denmark: Competitive and Retail Landscape

Finland: Market Context

Finland: Competitive and Retail Landscape

France: Market Context

France: Competitive and Retail Landscape

Germany: Market Context

Germany: Competitive and Retail Landscape

Greece: Market Context

Greece: Competitive and Retail Landscape

Ireland: Market Context

Ireland: Competitive and Retail Landscape

Italy: Market Context

Italy: Competitive and Retail Landscape

Netherlands: Market Context

Netherlands: Competitive and Retail Landscape

Norway: Market Context

Norway: Competitive and Retail Landscape

Portugal: Market Context

Portugal: Competitive and Retail Landscape

Spain: Market Context

Spain: Competitive and Retail Landscape

Sweden: Market Context

Sweden: Competitive and Retail Landscape

Switzerland: Market Context

Switzerland: Competitive and Retail Landscape

Turkey: Market Context

Turkey: Competitive and Retail Landscape

UK: Market Context

UK: Competitive and Retail Landscape

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