

# Irish Beef in Germany

Judith Clinton & Eoin Kelly, Bord Bia

January 9th, 2015



Working  
with nature

*Bord Bia*  
Irish Food Board



82 million



€3 trillion



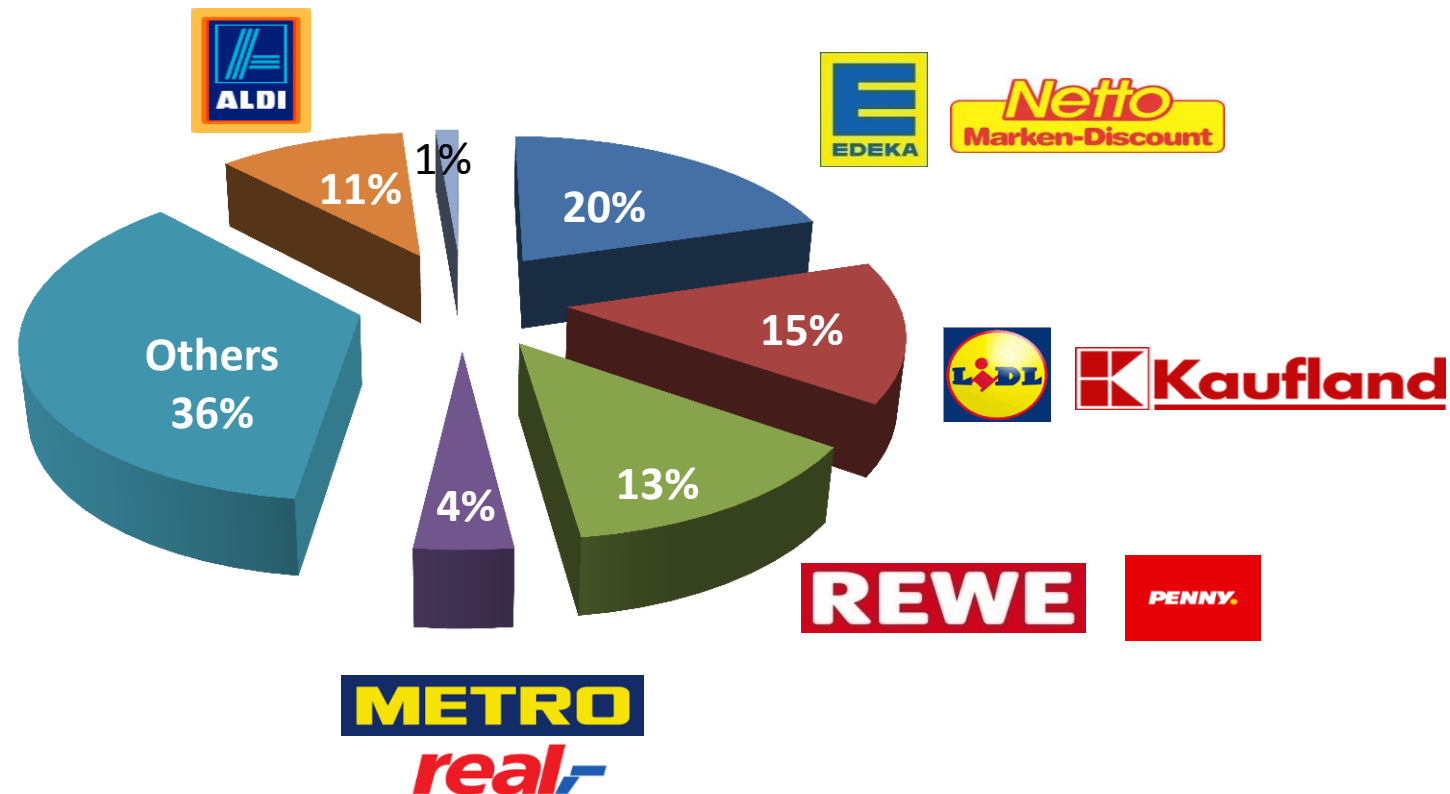
€571m

Source: IMF World Economic outlook 2014

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# German grocery retail market is worth €176bn

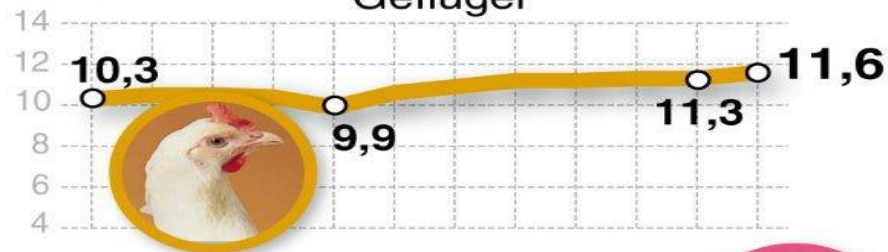


Source: Trade Dimensions 2014

# Meat consumption is 60.3 kg per head

in kg

Geflügel



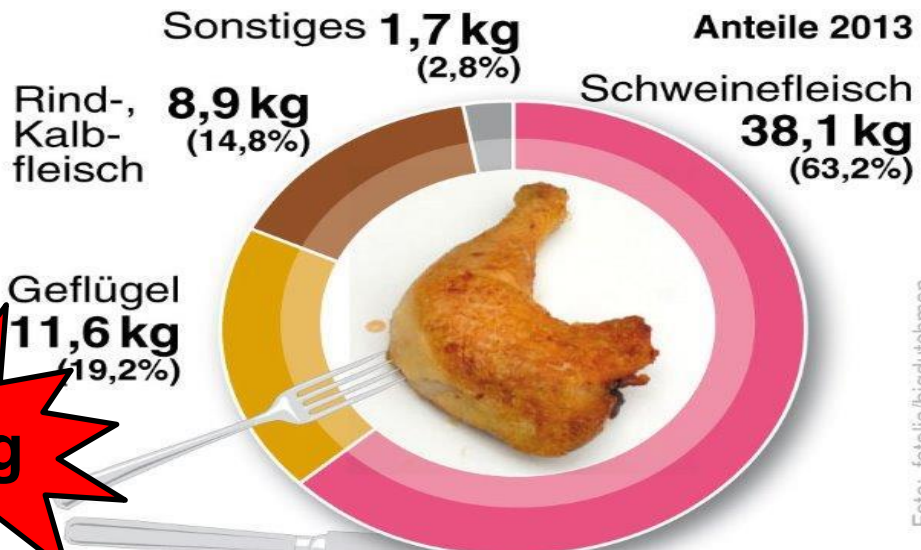
Fleisch insgesamt\*



Schweinefleisch



Rind-, Kalbfleisch

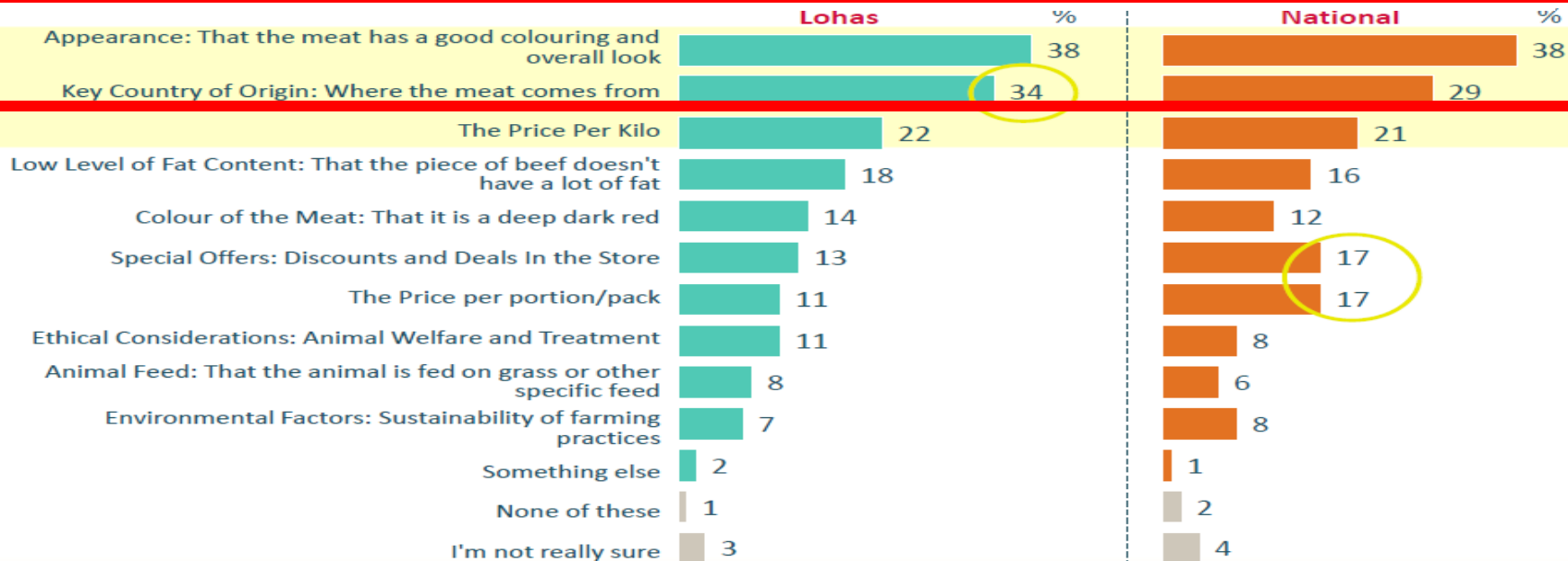


8.9kg

\* nach Abzug von Knochen, Futter, industrieller Verwertung und Verlusten

# Drivers of consumer beef purchasing

## Top Choice Drivers For Beef





# Irish Beef Success in Germany

- ✓ Sales growth across Germany
- ✓ Irish beef sales up 50% on 2012
- ✓ Extra 6,000 tns Irish beef
- ✓ Irish beef listed in 4 of the top 5 retailers

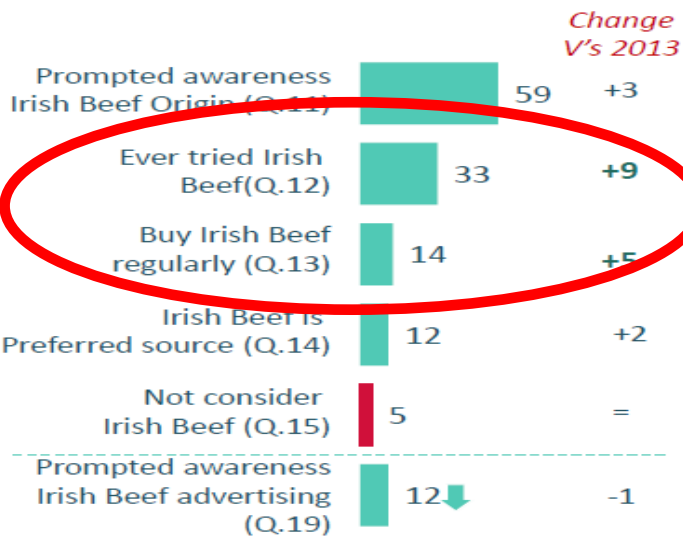


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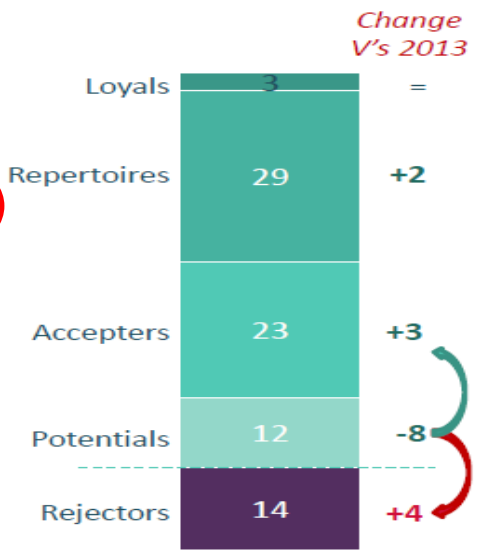
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# Awareness of Irish beef now at 60%

## Irish Beef Experience



## Commitment (Q15A)



## Equity – Ireland as a Beef Producer (Q16)



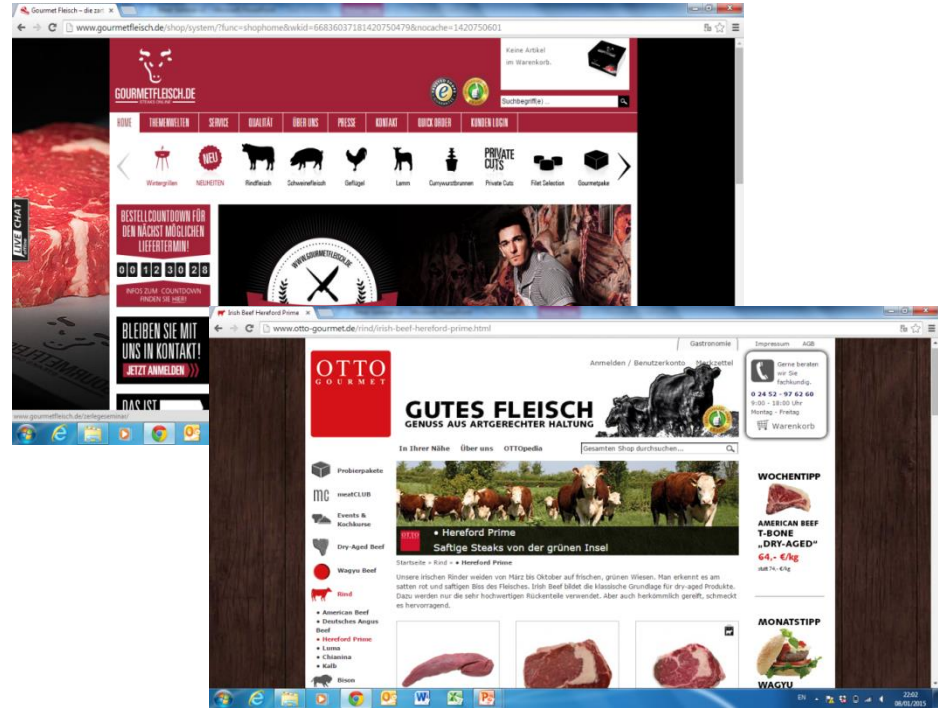
# Consumer Insights 1: Dietary Choice



Dietary Choice	% of Pop
Vegetarian/Vegan	3.7 / 0.3
Flexitarian	11.6
Eat less meat	9.5
Eat same amount of meat	75.1



# Consumer Insights 2: Multi Channel



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# Consumer Insights 3: Convenience



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# Consumer Insights 4: Regionality





# Irish Beef Marketing Activity 2015

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec →

## Integrated & focused Communications Strategy for 2015.

Activation /  
Promotion

Activation /  
Promotion

Big summer  
activation campaign

Basic Communications over 12 Month Period

PR / Social / Website



Tactical Trade Support

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BEEF-FREUND 15.07.2014  
IRISH BEEF - WELTMEISTERKLASSE!



von  
ore86  
am  
15.07.2014



Besser hätte das Wochenende gar nicht sein können! Wir sind Weltmeister und dazu gab es das eine oder andere Irish Beef - ein wahres Hochgenuss - Irish Beef!

★★★★★ GOURMET-GRILLER 29.06.2014

VIELN DANK FÜR EINEN „WELTMEISTERLICHEN“ GRILL-ABEND



von  
TobiasBux  
am  
29.06.2014



# Gourmet Griller



# Posts

16.06.2014

BEEF-FREUND  
TELLERBILD UND FAZIT



von  
t\_rode  
am  
22.06.2014



Zu guter letzt ein Tellerbild mit Rosmarinkartoffeln und Römersalat selten haben wir solch gutes Fleisch auf dem Grill gehabt! ... [weiterlesen](#)



Gewinne ein Irish Beef Gourmet-Paket im Wert von 100 Euro



von  
mischblut  
am  
16.06.2014



Gestern war es soweit und ich habe mit meiner Familie das Fleisch auf dem Grill zubereitet ... [weiterlesen](#)



# Irish Beef On Pack Promotion 2014




**real**

**Kaufland**



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# Sales +50%



## CLOVER

Alles über das köstliche Beef von der Grünen Insel



## DUBLIN- WOCHENENDE FÜR 2 ZU GEWINNEN!

Jetzt Gewinncode  
eingeben auf

[WWW.IRISHBEEF.DE](http://WWW.IRISHBEEF.DE)

123-345-567-789

BEEF-FREUND

16.06.2014

# Awareness 60%



Gestern war es soweit und ich habe mit meiner Familie das  
Fleisch auf dem Grill zubereitet ... [weiterlesen](#)



BEI UNS KOMMT BEEF NOCH  
WIE JEHER VON DER WEIDE.

Hier sind die Tiere ganz traditionell bei Wind und  
Wetter draußen. Unser schmeckendes Gutes und das from  
Ansehen sorgen für herrlichen Geschmack und  
auffallende Zartheit - dafür steht unser Qualitätsiegel  
mit dem Kleeblatt. Aber was bedeutet es, Sie probieren  
unser Beef einfach selbst!

Einfach unsere Natur.

GEBUCHT: DIE IRISH BEEF  
GOURMET-CRELLER 2014  
Der National Irish Beef-Person  
des Jahres 2014 ist... [www.irishbeef.de](http://www.irishbeef.de)

# German Retail Fresh Meat Trends



Eoin Kelly, Bord Bia



# Retail Fresh Meat Data



- ✓ Purchased GfK data for German fresh meat market on a trial basis
- ✓ 52 w/e and 12 w/e periods available
- ✓ Available across the following meats:
  - ✓ Beef
  - ✓ Lamb
  - ✓ Pork
  - ✓ Poultry
- ✓ Data broken down by main cuts
- ✓ Trends by retailer



# Retail Fresh Meat Data



- ✓ Total Value
- ✓ Total Volume
- ✓ Penetration
- ✓ Volume per buyer
- ✓ Spend per buyer
- ✓ Frequency of purchase
- ✓ Average price





# German Retail Meat Market Overview



**Market worth over €9.9bn value**



- Increased shopping frequency
- Lower spend per buyer



- Strongest market share growth in Lidl
- Growth also shown in Netto and Kaufland.
- Decline in share for Aldi and Real

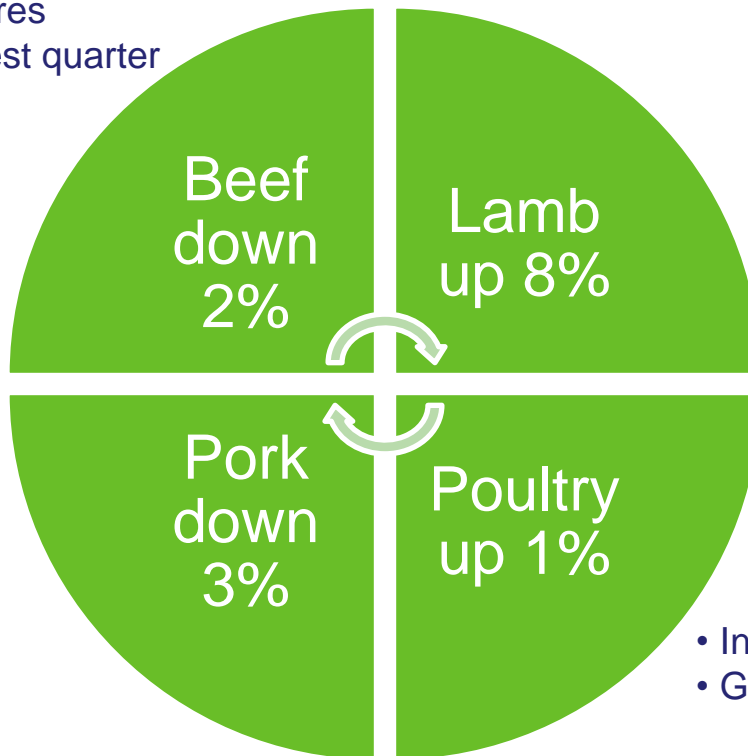


# Meat Sales down 2% in Value, 52 w/e Sept 2014



- Down marginally in most measures
- However growth recorded in latest quarter

- Increased spend per buyer
- Greater frequency

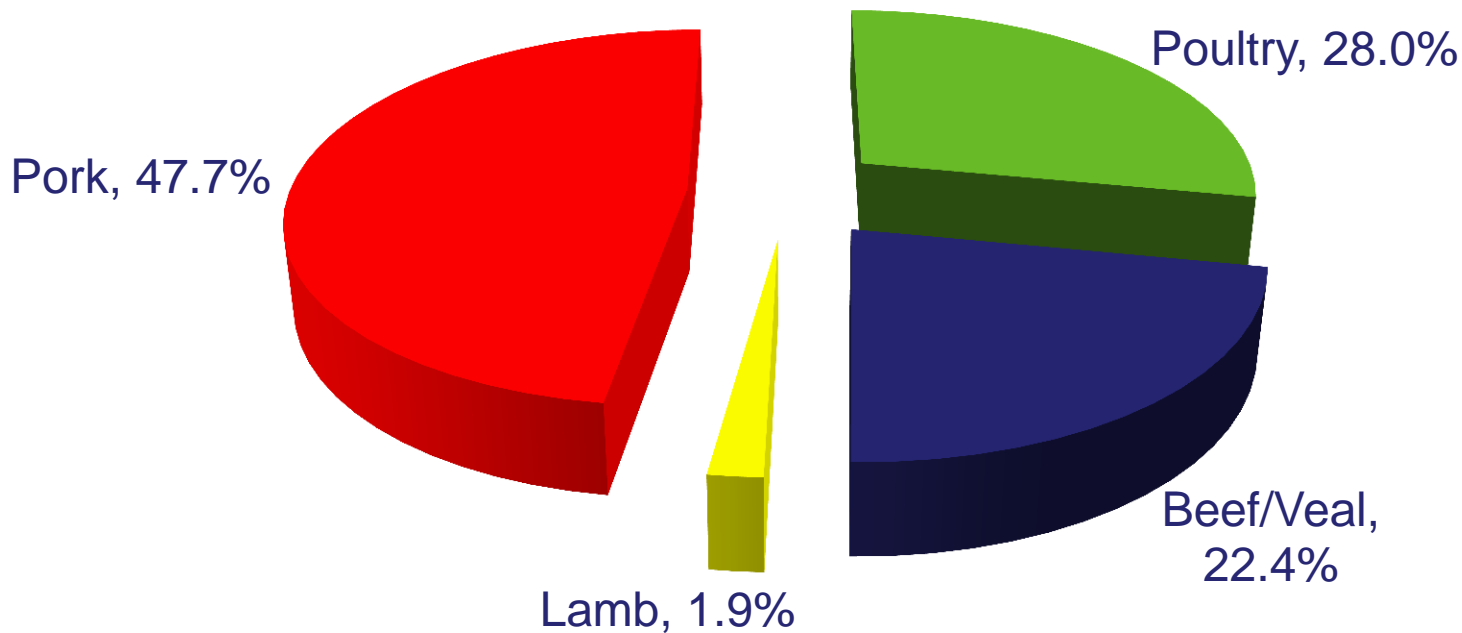


- Pork has been declining
- Down in all measures
- Down in quarterly period

- Increased spend per buyer
- Greater frequency

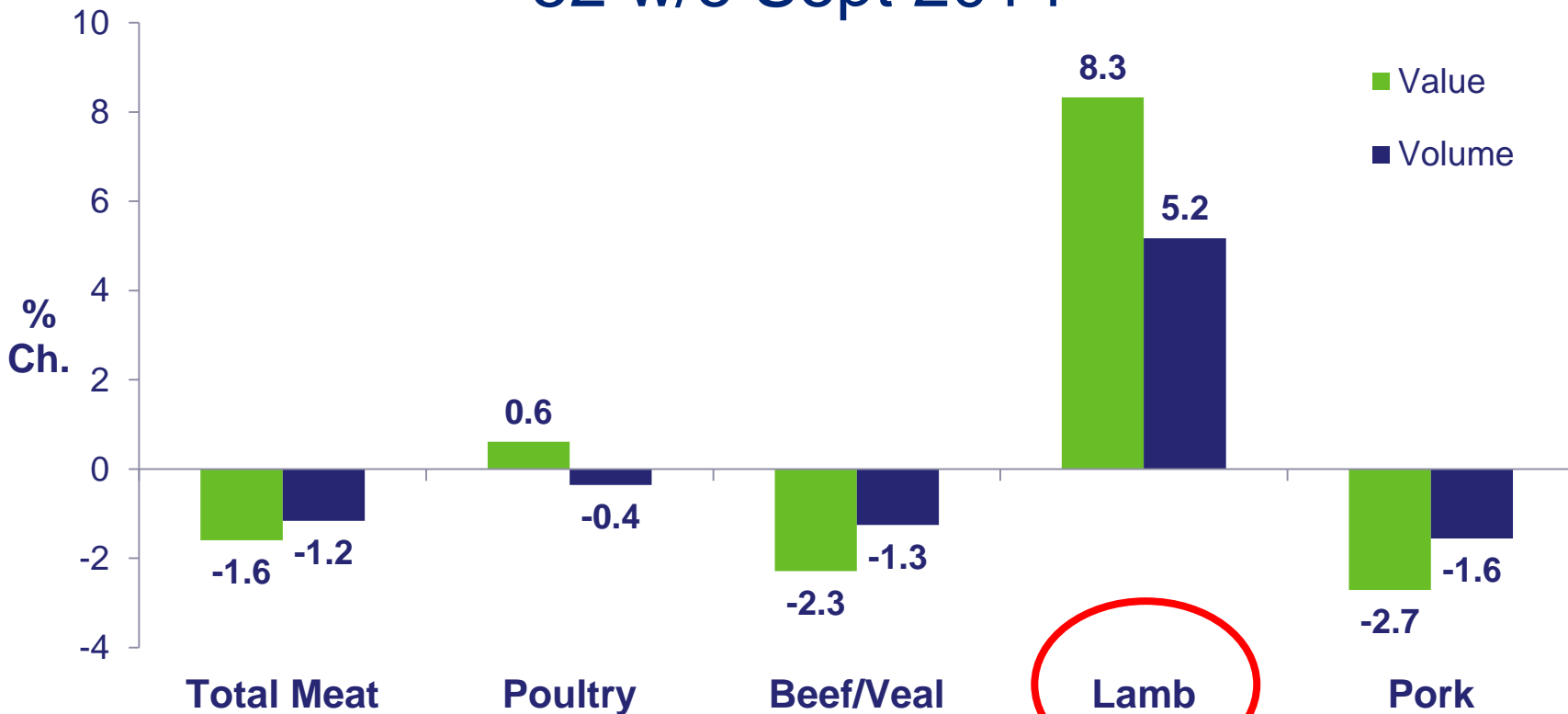
# Value Market Share by Meat

## 52 w/e Sept 2014



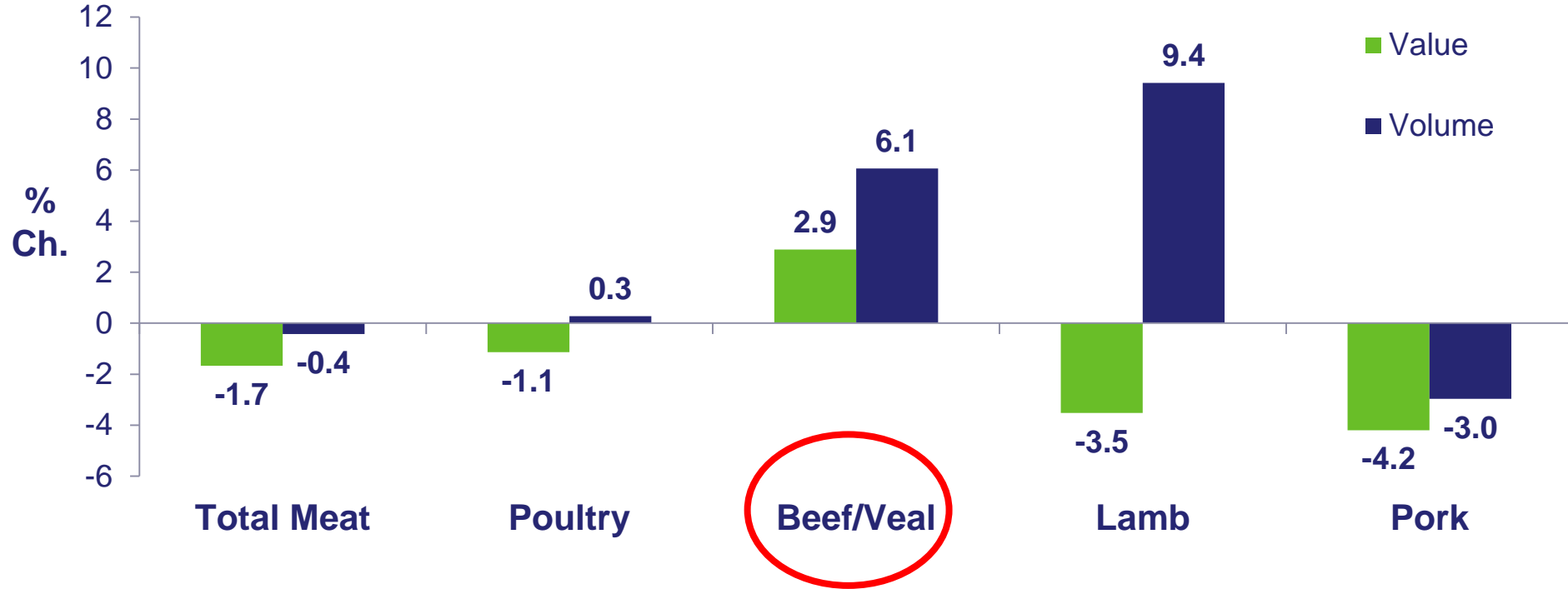
# Sales Trends by Meat

## 52 w/e Sept 2014



# Sales Trends by Meat

## 12 w/e Sept 2014





# Retailer Overview

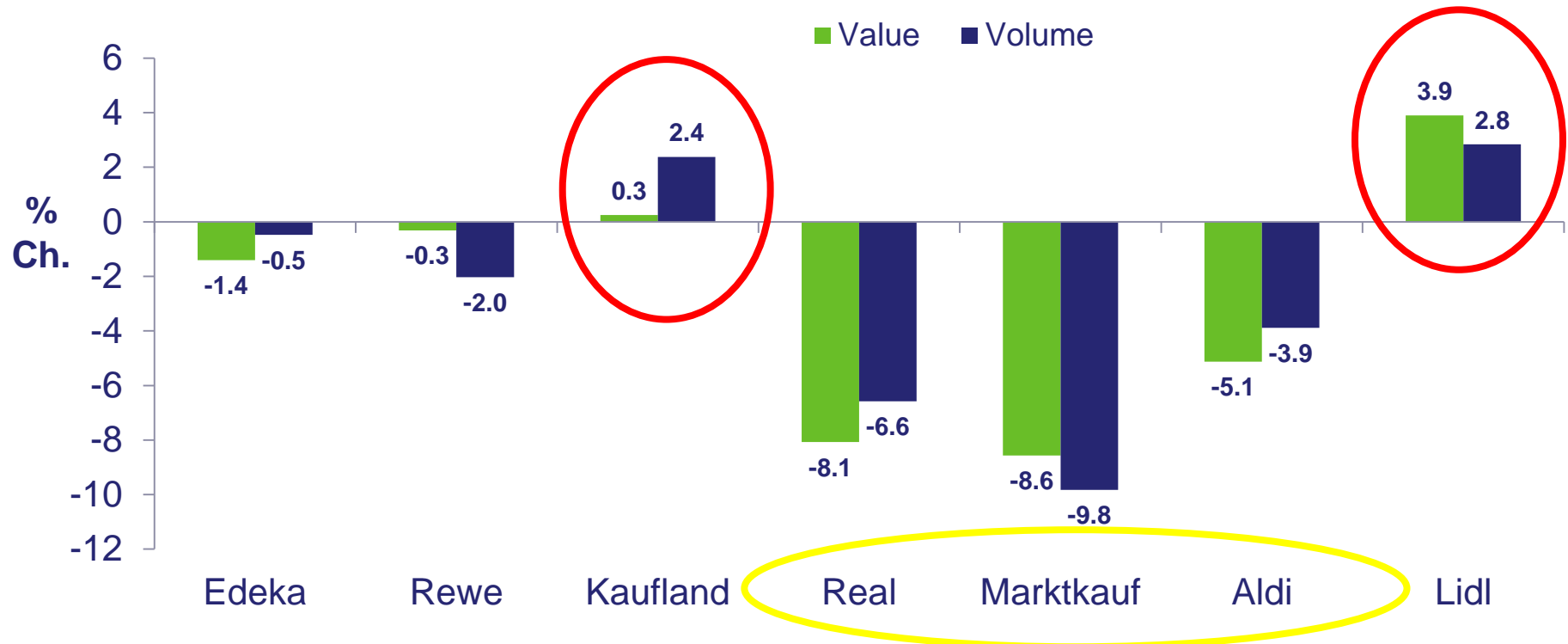


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# Meat Trends by Retailer

## 52 w/e Sept 2014



# Retail Trends for Beef

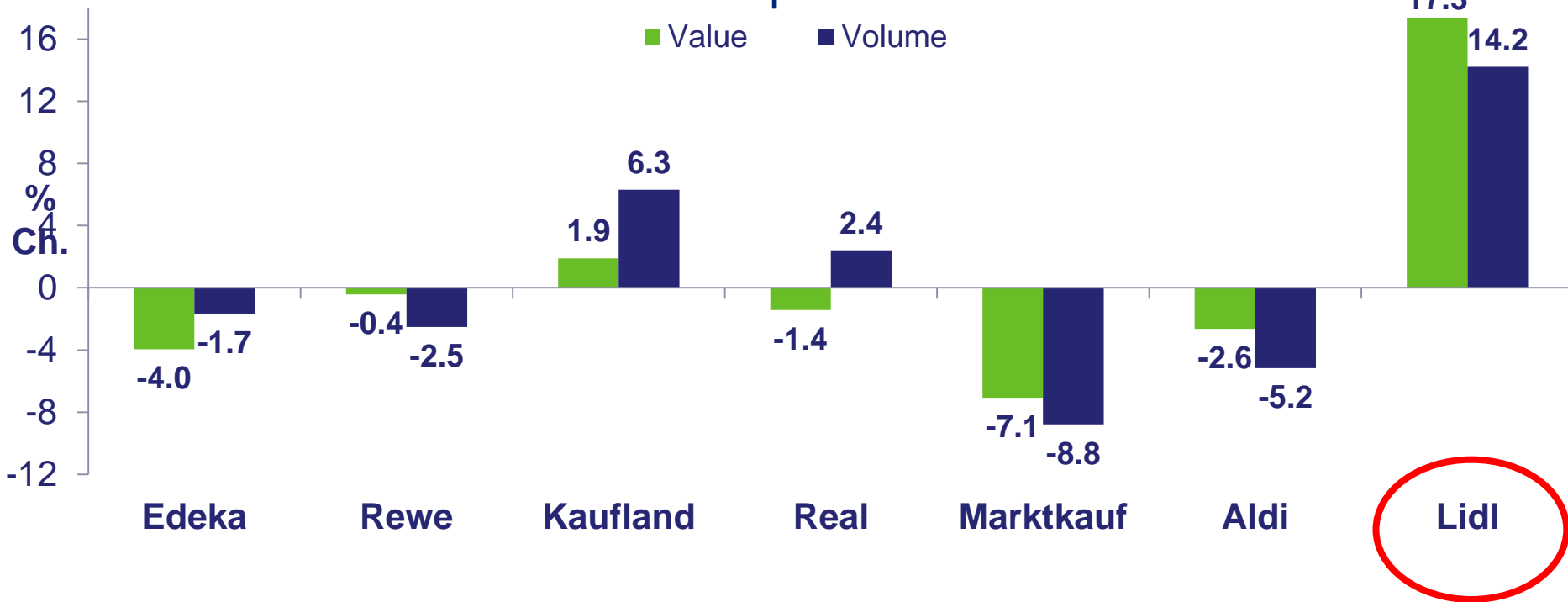


# Latest Beef Measures

12 week ending	Sept 2014	YOY % Ch
Penetration %	52.9	4.0
Frequency (no. of purchases)	2.9	2.5
Volume per buyer (kg)	2.4	1.5
Spend per buyer (€)	21.2	-1.6
Average Price (€/kg)	9.0	-3.0

# Beef Trends by Retailer

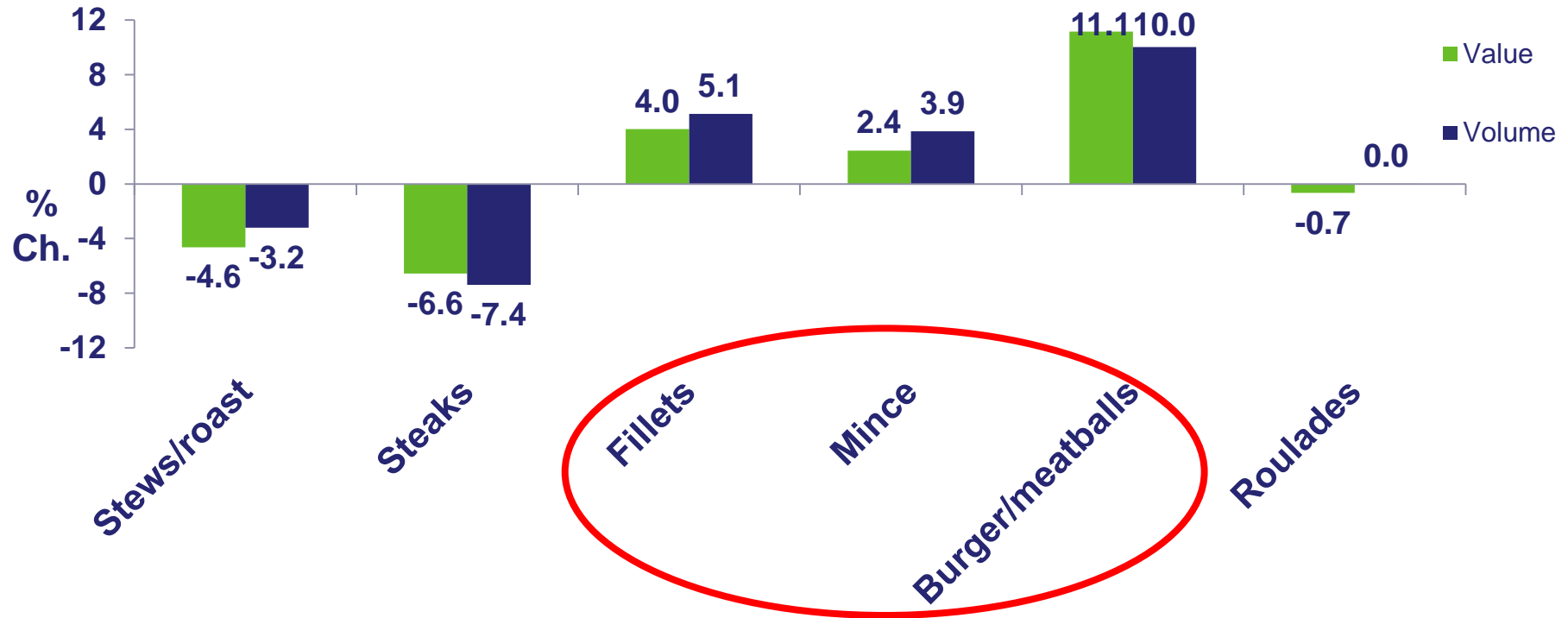
## 52 w/e Sept 2014





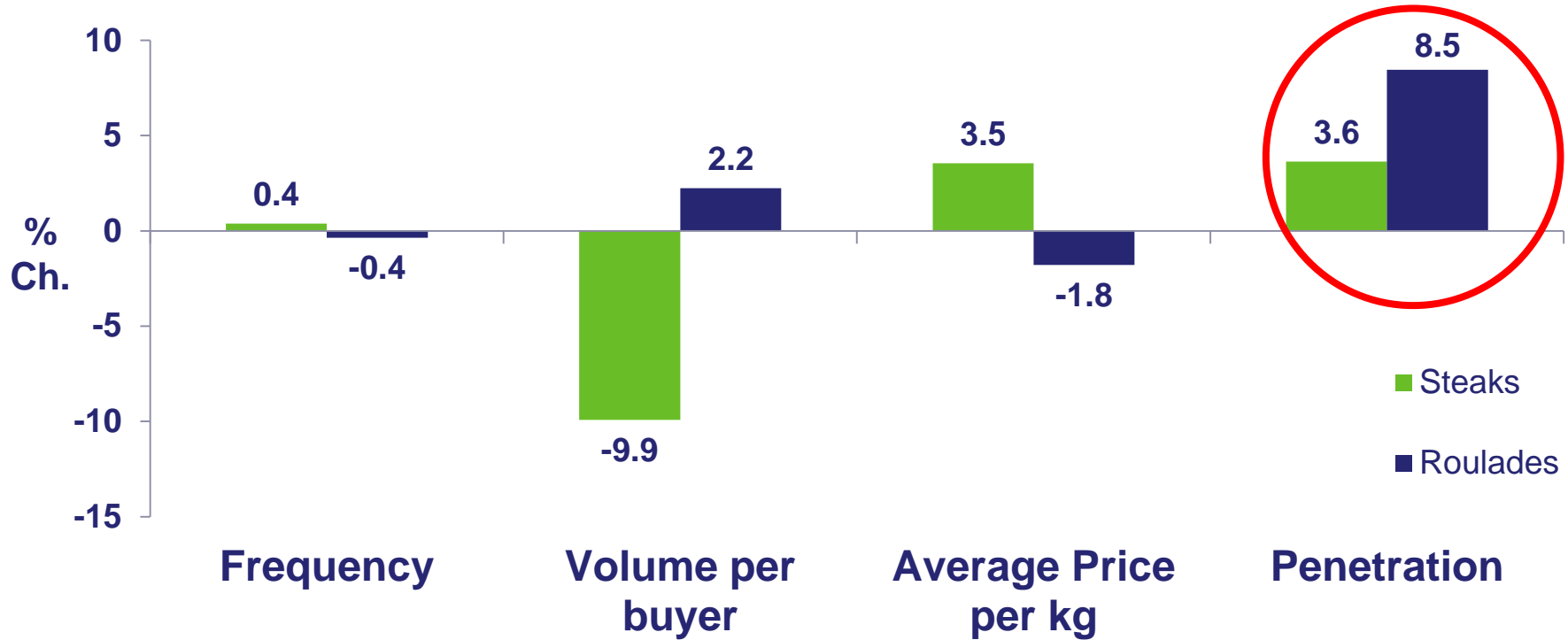
# Trends by Beef Cut

## 52 w/e Sept 2014



# Performance Measures by Beef Cut

## 12 w/e Sept 2014



# Lamb



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# Latest Lamb Measures



12 w/e period	Sept 2014	YOY % Ch
Penetration %	5.8	-3.2
Frequency	1.4	2.9
Volume per buyer (kg)	1.2	12.5
Spend per buyer (€)	16.1	-0.8
Average Price (€/kg)	13.6	-11.8

# Summary

- ✓ Data now available quarterly
- ✓ Available for individual cuts and retailers
- ✓ Wide range of measures covered
- ✓ If you would like anymore information contact:
  - [Eoin.kelly@bordbia.ie](mailto:Eoin.kelly@bordbia.ie)
  - 01 6142211



# Thank you for your time!



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