



Bord Bia
Irish Food Board

Yemco Conference Cork 23 – 24 March 2007





THE MID TERM CHALLENGES OF THE EU MEAT INDUSTRY

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SUMMERY OF CONTENTS

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→ 2. "USP" (UNIQUE SELLING POINTS)

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1. ADDED VALUE

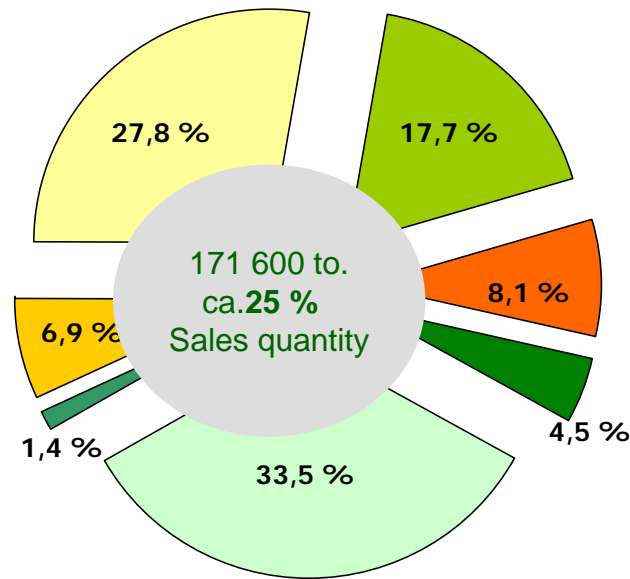
Compounds for Industrial purposes



Convenience Food



Poultry



Sausage



Bacon



Headmeat



MAP (modified atmos.)



• Product proposal:

(more and more komplex product development)

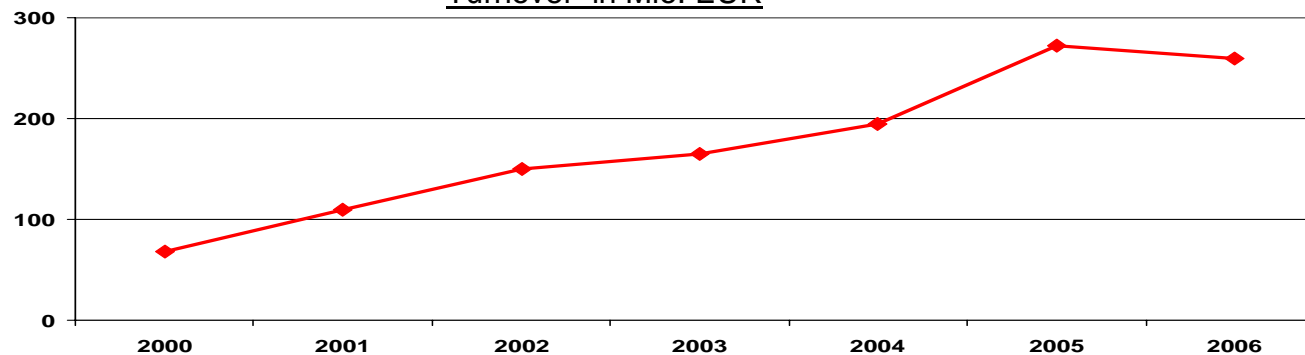


• Trends:

- Discount needs fresh Convenience
- „Rucksack EU“ with Discount shop partner
- Pan-, oven-, Microwave meals (frisch, „chilled food“)



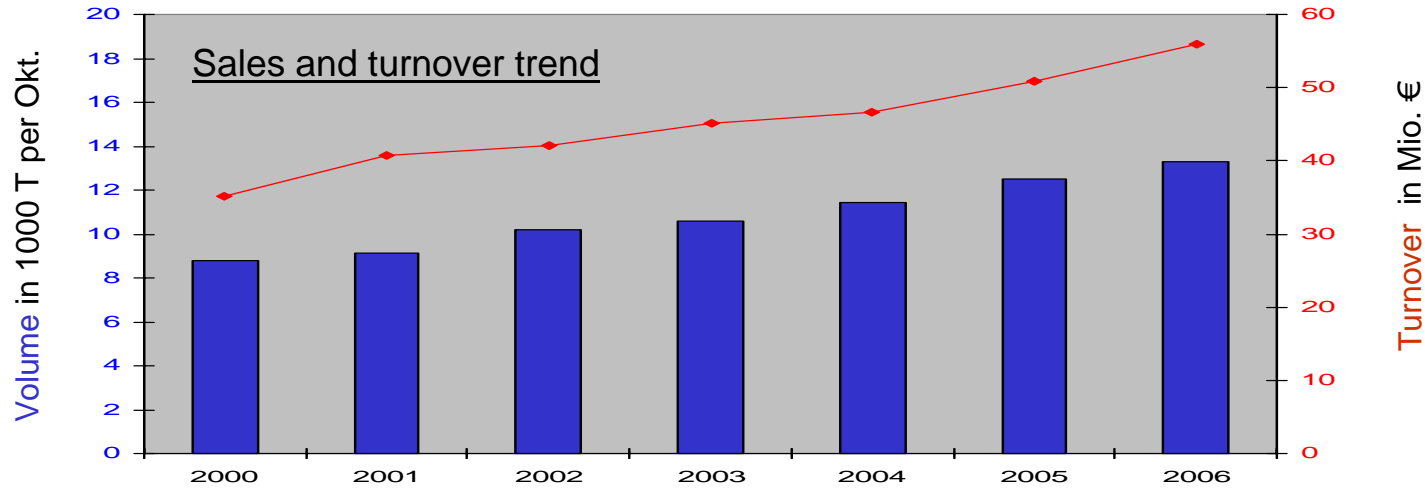
Turnover in Mio. EUR





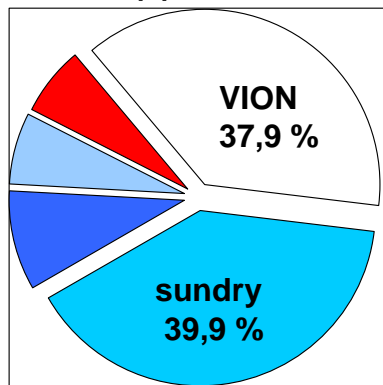
Oer-Erkenschwick





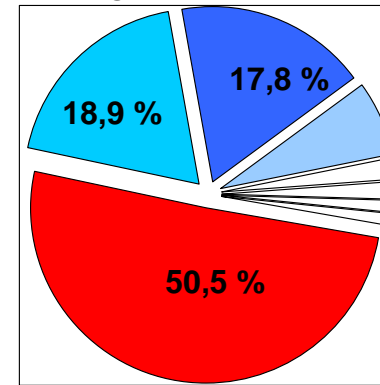
Supplier

Westfleisch 6,4%
Kleff 6,7%
Danish Crown 9,1%



2006:
Sales volume + 8 %
Sales quantity + 6 %

Range of products



1. Loin
2. Spare Ribs
3. Mincedmeat produkt

2. „USP“ UNIQUE SELLING POINTS

TRANSPARIND
Geisere Herkunft – geborene Qualität

1453 contracts

87 643 pcs.

BESTSCHWEIN
Vertrauen durch Transparenz

1917 contracts

3 667 378 pcs.

BESTFERKEL

271 contracts

526 189 pcs.

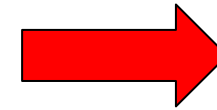
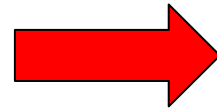
BEST Kalb
Vertrauen

25 contracts

20 156 pcs.



3. TRACEABILITY for PRIVATE LABEL



Basis

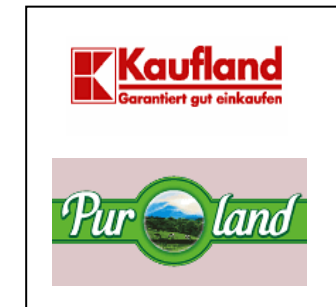
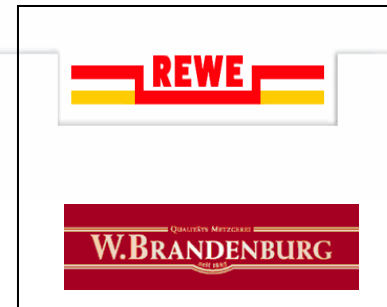
Contract /Ohrmarke

Way

animal stamp, label for slaughtered sides and pieces

Aim

Meat and sausage in Commerce



Westfleisch Export



Ungarn



Hr. Turnai,

Vertriebsbüro Moskau



Hr. Kartvelishvili,



Rumänen



Hr. Gainar



Polska Sp.z.o.o.
gegr. 1.11. 2006



Hr. Zalewski



Hr. Froncek,

Plus



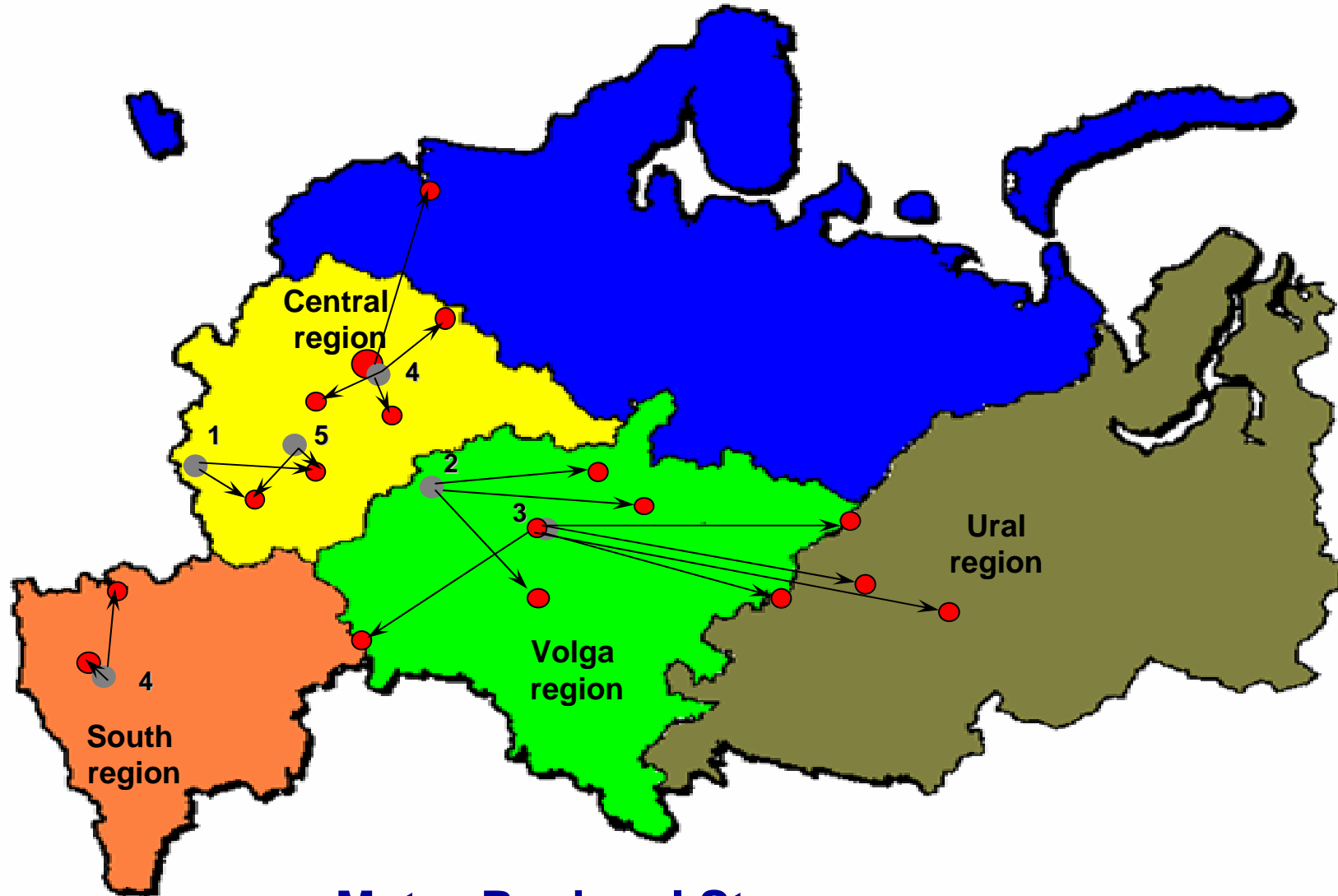
Übersichtskarte Europa

andere Länder



METRO Group

Metro Group



Metro Regional Stores

STRUCTURAL CHANGE IN THE MEAT INDUSTRY

- Strategy

- Either growth or niche

- Presently

- All leading meat sellers have their own processing facilities
- Factors for success are correlated to size of enterprise
Financial capacity – Internationality -Marketing capacity
- More processing companies (for example producer of sausage or ham)
Usually smaller, but advanced in development of market and assortment
Dependant on deliveries of meat sellers

- Structure 2010 (prognosis of WF)

- 3-5 big processing companies
- 5 big meat sellers with > 3 Billion EURO turnover
- **Advantage:** Securing raw materials
 Depth of assortment (SB-meat, sausages, convenience)
 Activities abroad





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