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**PROGRESS**

# The protein market in retail and foodservice: Current and future insights in supply chain, trade position, and consumer trends

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**Niels van Gestel**

Chief Commercial Officer

**PLUKON FOOD GROUP**

Think Fresh. Act Fresh. Make Fresh.

**1. ABOUT PLUKON FOOD GROUP**

**2. CONSUMER BEHAVIOR (GFK)**

**3. ANIMAL WELFARE/ CONCEPTS**

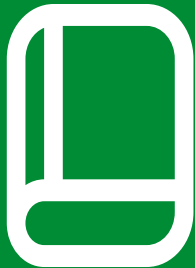
**4. REGIONALITY**

**5. FURTHER DEMANDS**





# COMPANY PROFILE



**1894**  
founded



**3.3 billion**  
revenue



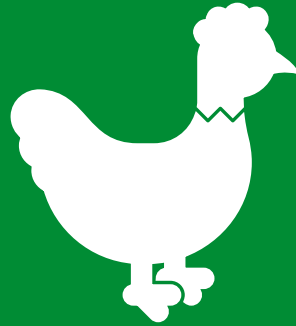
**11,000**  
employees



**38**  
locations




**7**  
countries




**1,330**  
Volume k  
tons

# Plukon Food Group - Geographical footprint and key figures 2023-2024

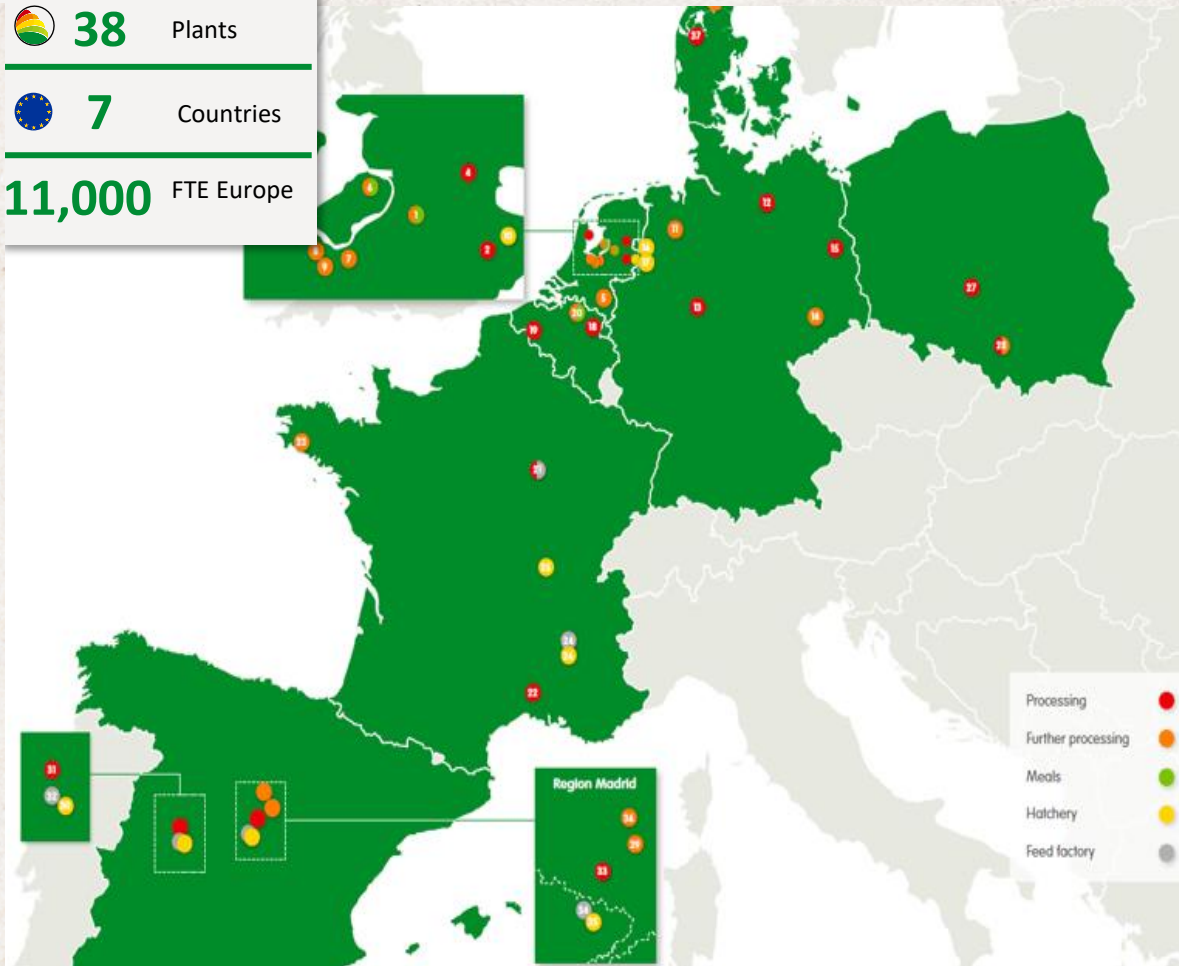
 **38** Plants


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 **7** Countries


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**11,000** FTE Europe






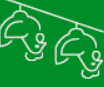
**490 tons**  
of vegetables per week



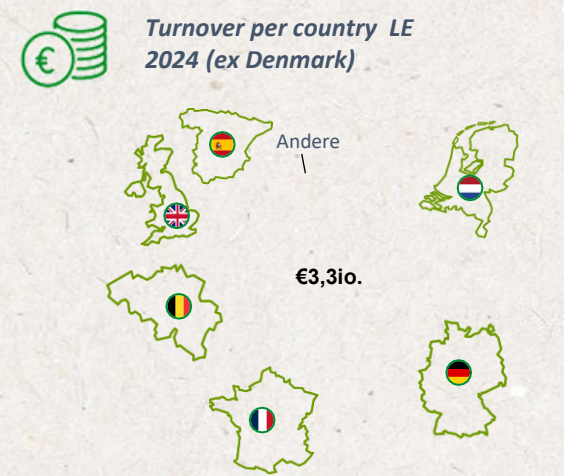
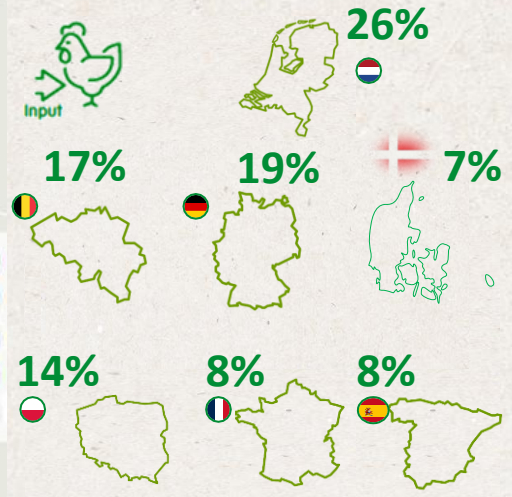
We provide work for  
**9,288**  
FTE and 6,272 FTE without  
temporary workers!



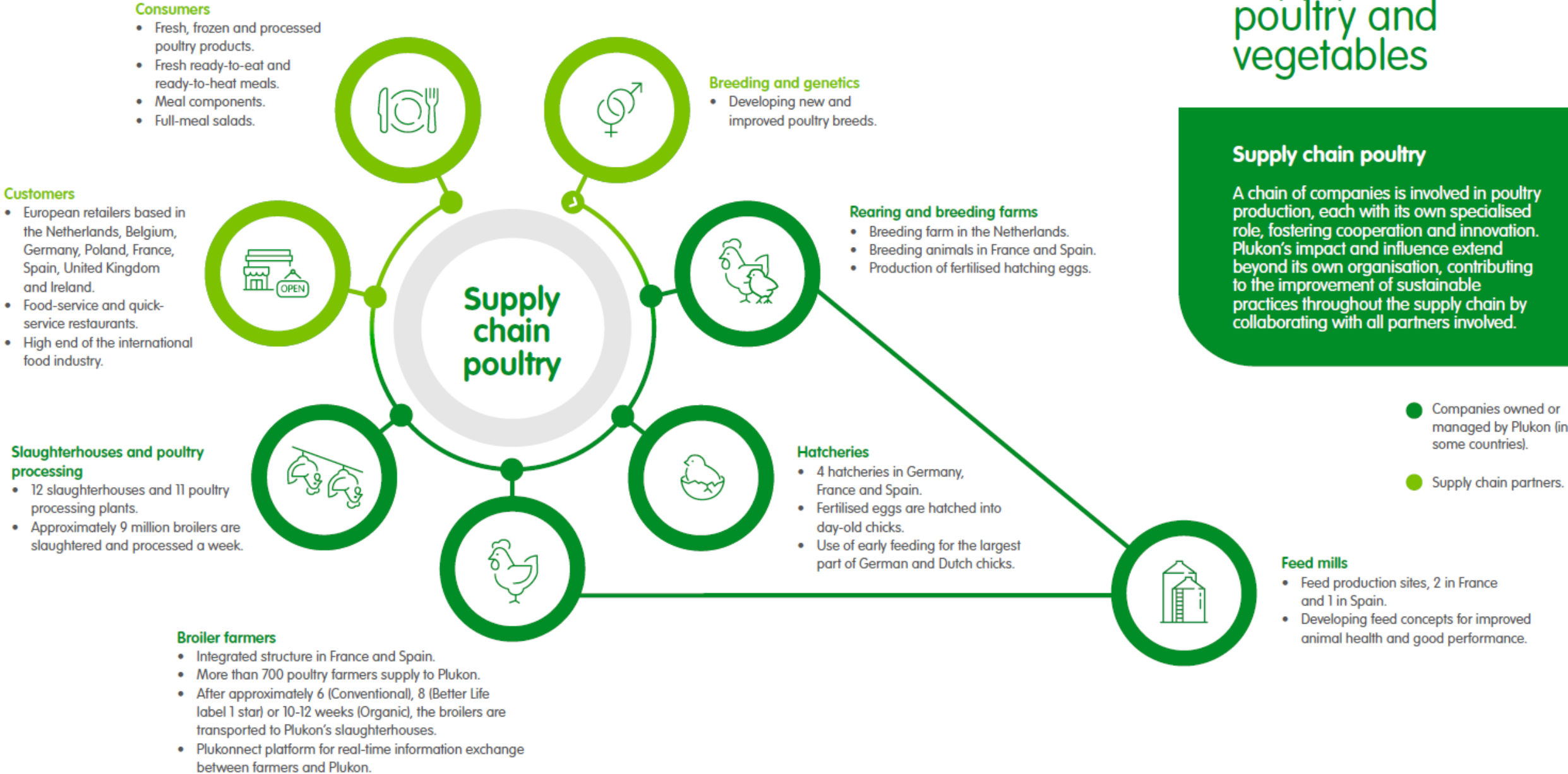
**442 tons**  
of meals & salads per week



Approximately  
**9 million**  
broilers are supplied and  
slaughtered per week



# Supply chains poultry and vegetables



## Supply chain poultry

A chain of companies is involved in poultry production, each with its own specialised role, fostering cooperation and innovation. Plukon's impact and influence extend beyond its own organisation, contributing to the improvement of sustainable practices throughout the supply chain by collaborating with all partners involved.

## Supply chain vegetables

Plukon began producing meals with vegetable components in 1999, and since then, the daily amount of processed vegetables has increased significantly. After a fire in 2017, the production facility in Wezep was rebuilt and further equipped for vegetable cutting and processing. In 2020, Plukon acquired Fresh Care Convenience in Dronten, a facility specialised in vegetable processing. In the coming years, Plukon will focus on further organising the vegetable supply chains.

- Company owned or managed by Plukon.
- Supply chain partners.





# Our Concepts - Product portfolio

## Healthy and responsible products

As every day is different, we have based our range on four strong concepts.

1. Poultry
2. Meals and salads
3. Meal ingredients
4. Alternative proteins

We are constantly working on healthy and sustainable product innovations. To achieve this, we are using more and more responsibly produced raw materials.





# Retail

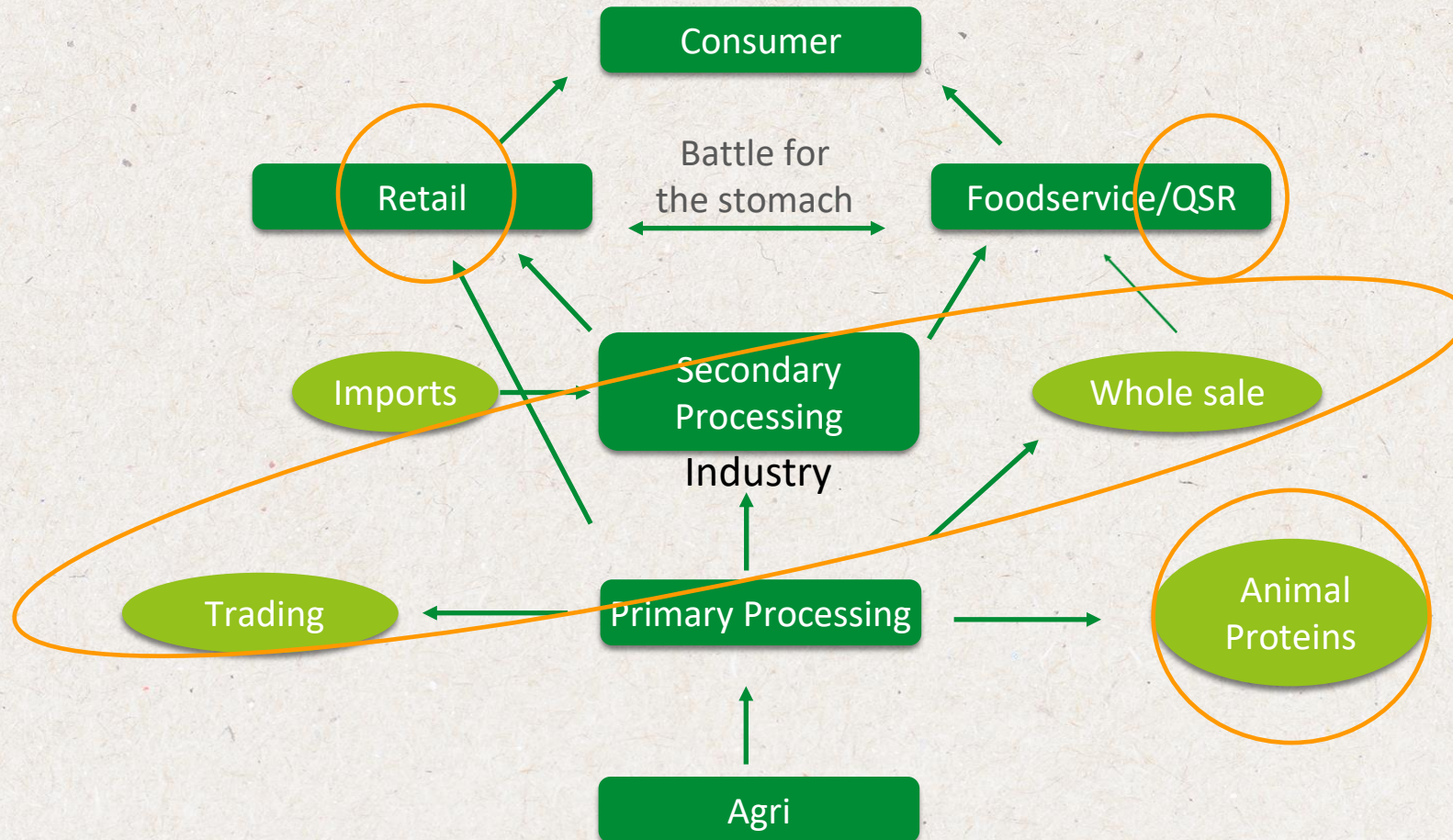
						
						
						
						

# Foodservice and Business-to-Business



# Supply chain chicken



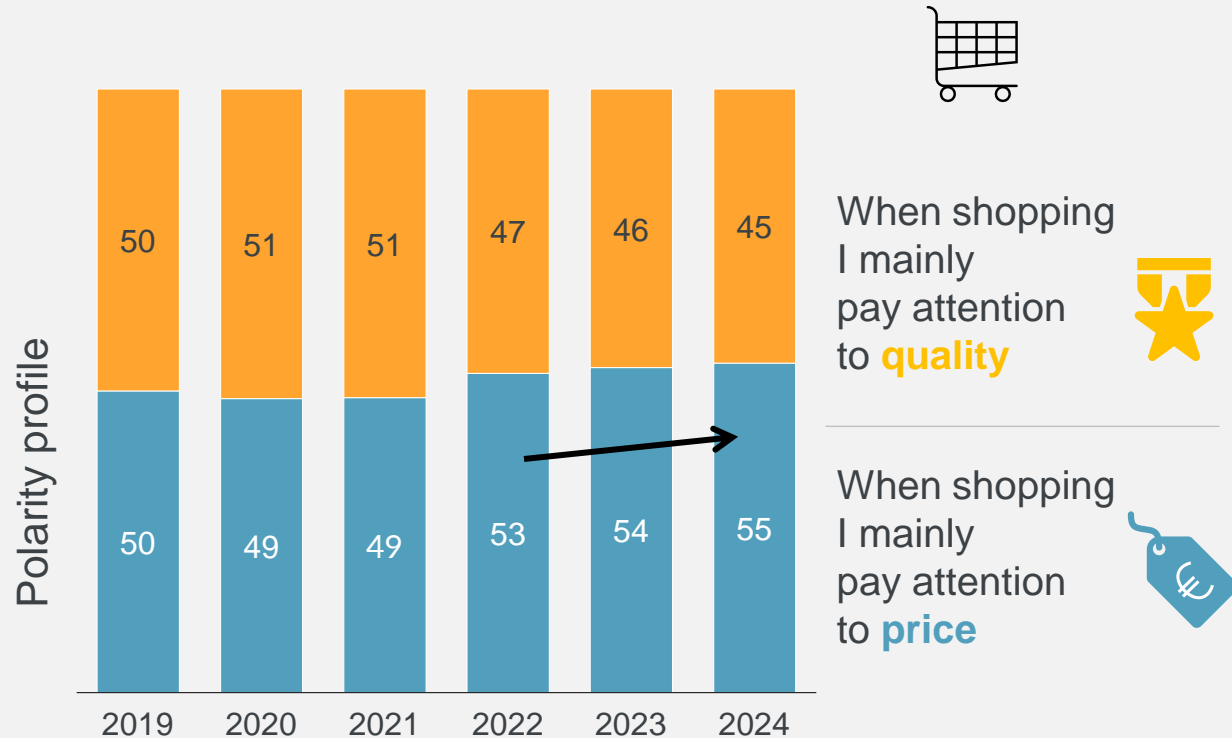


# Consumer behavior (GfK) – Influence of younger generations



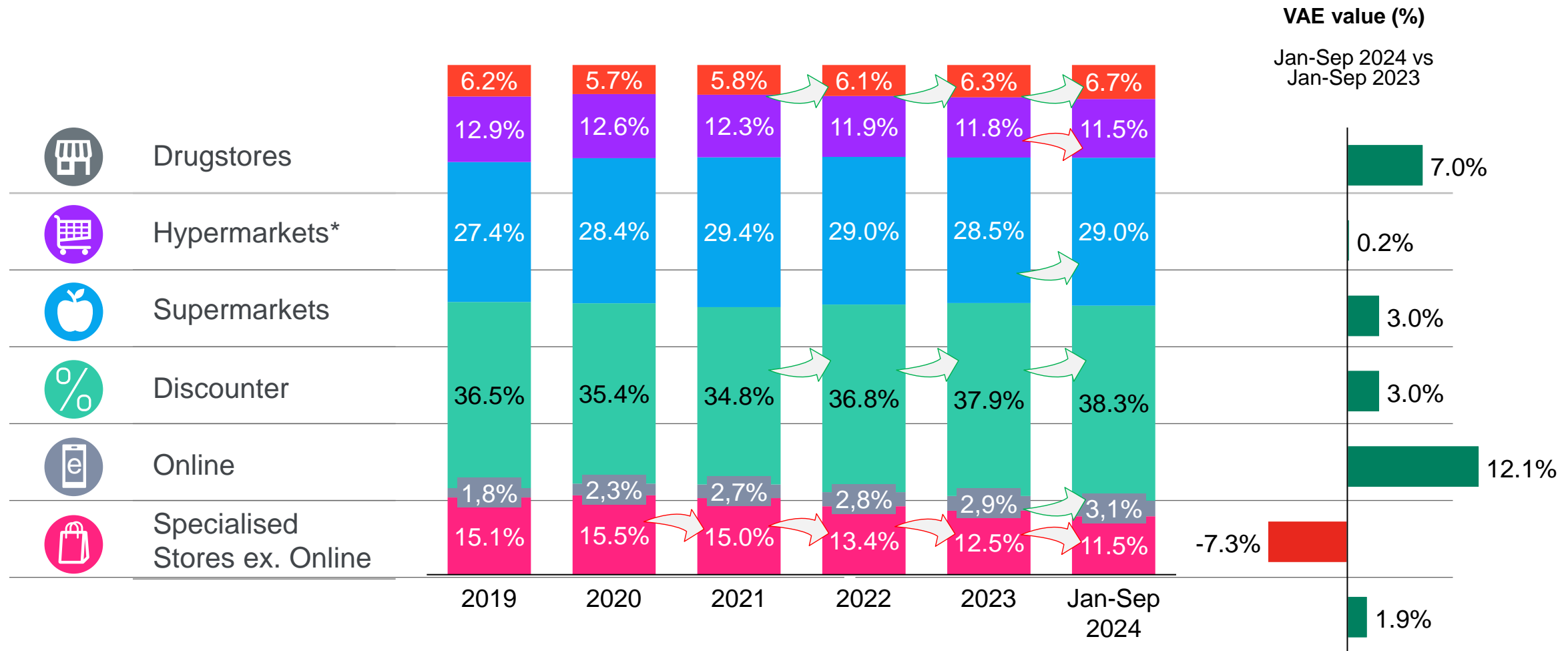
## ... still focus on price!

Quality/price orientation, agreement in %



# Discounters were able to set themselves apart from the competition in 2022 & 2023 – in 2024 they continued to increase their sales dynamically

FMCG total | Market share (sales) & sales development | Distribution channels



Quelle: DE YouGov FMCG

\*Hypermarkets with „real“ effect



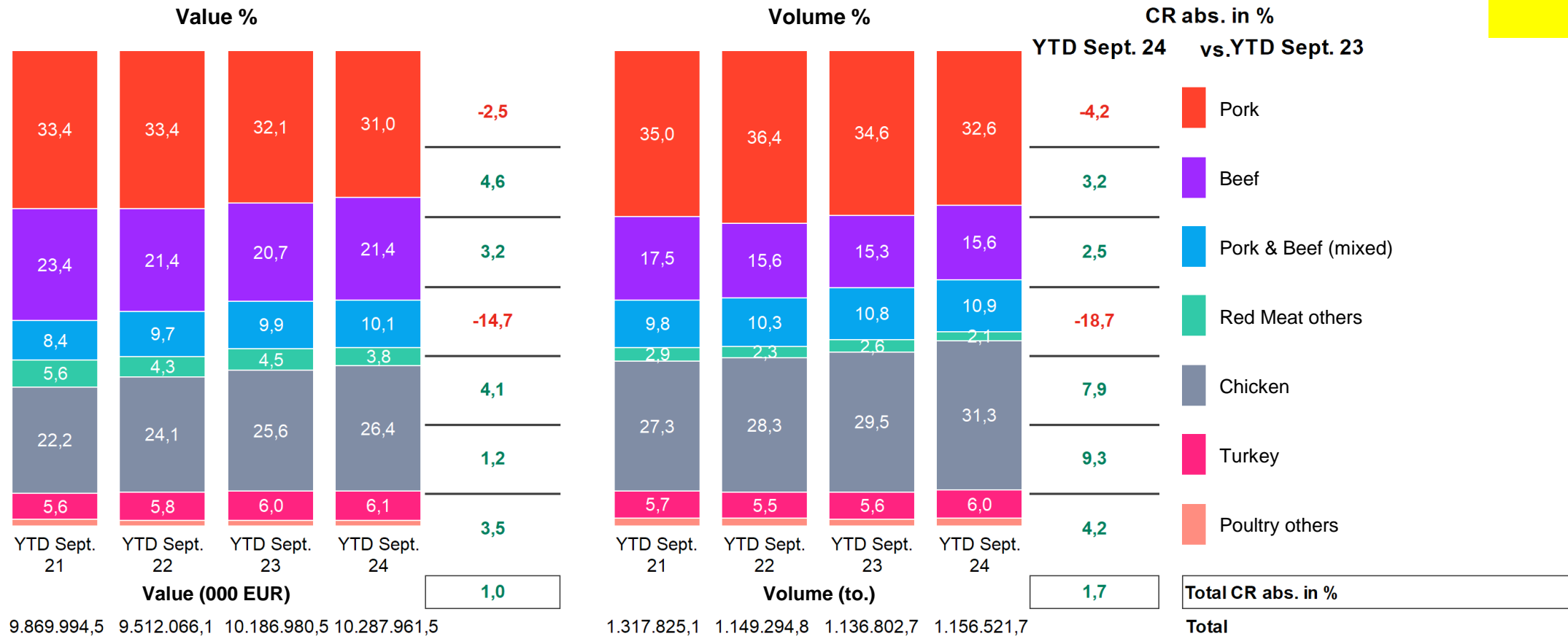
# After a small intermediate high in 2022, pork loses market shares again. Beef also continues to decline. Other red meat increases.

Poultry, especially chicken, wins market shares. Turkey also with positive development.

Total Meat Animal Type

Germany Total

Anmerkung YouGov:  
Aktualisierung mit YTD Sep 2024



# Six generations – the generations are shaped by different political, economical and cultural developments. At the end, this shows also in their dietary styles.

Generations in Germany according to character and in coordination with international studies

**Reconstructors**

**Baby boomers**

**Generation X**

**Millennials**  
(Generation Y)

**iBrains**  
(Generation X)

...  
(Generation Alpha)



## Birth cohorts

before 1952

1952-1966

1967-1981

1982-1996

1997-2011

after 2011

## Current Age

72 years and similar

57-71 years

42-56 years

27-41 years

12-26 years

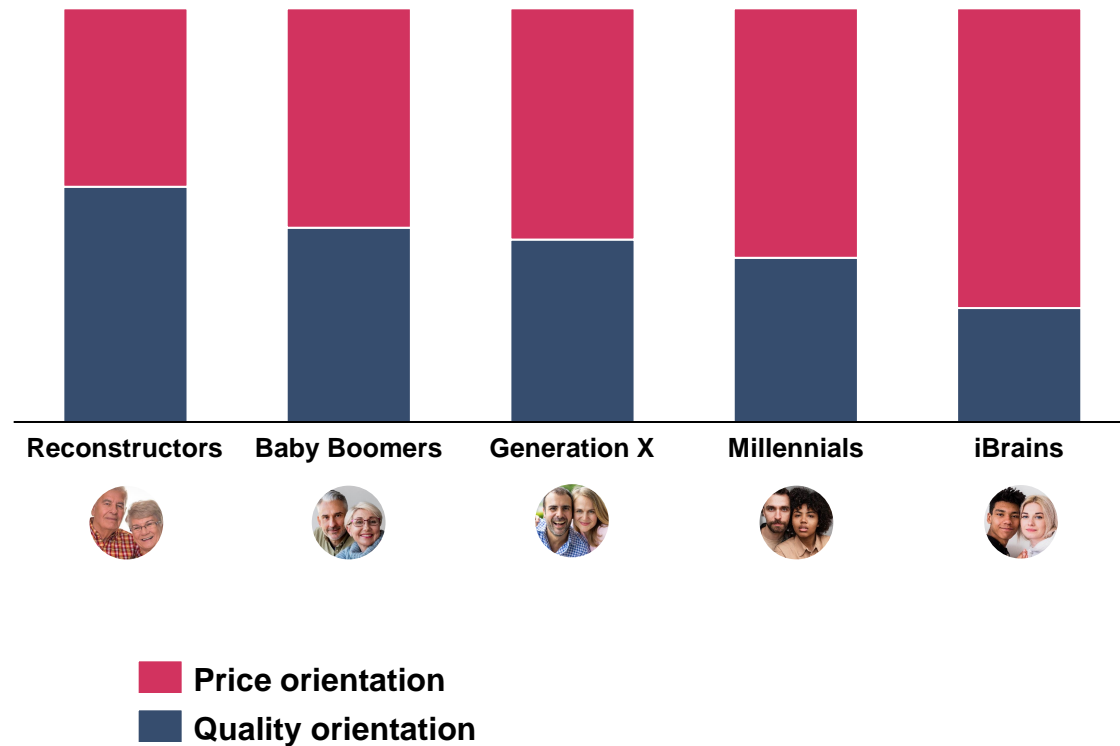
11 years and over

**In the following empirical analyses, only people who run a household (i.e. iBrains aged 18 and over)**

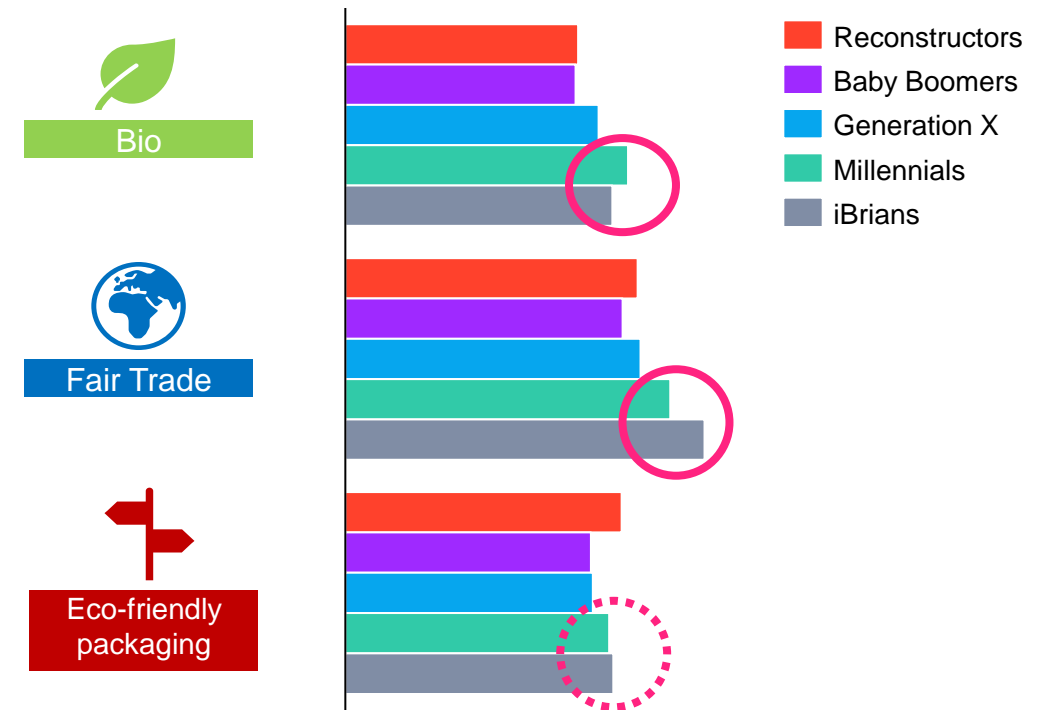
Kitchen of the Necessity	Fast Food + 1. internationalisation	Global cuisine (World Kitchen)	Health + Fitness	Planetary Health Diet (Soul Kitchen)
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# They are significantly more price oriented, but also willing to pay more money for sustainable products

Price vs. Quality orientation  
in %



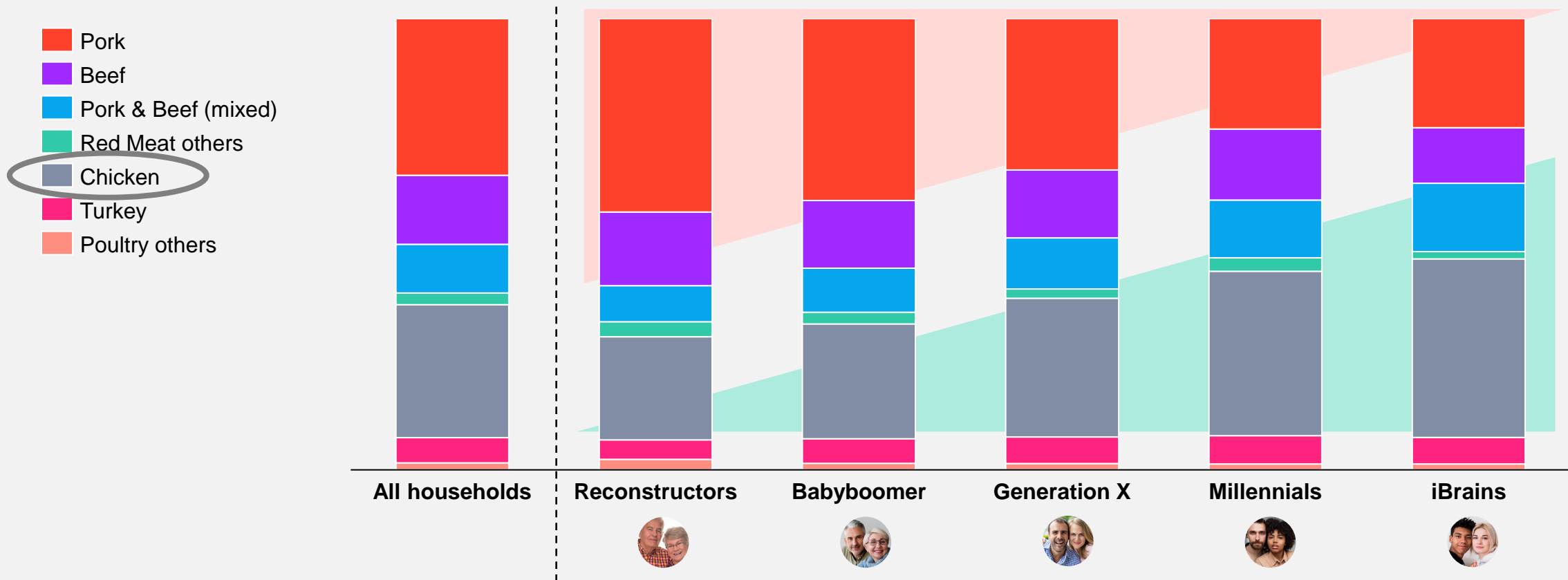
Share of willingness to pay more money for ...  
Agreement in %










# The younger generations buy disproportionately Chicken and mixed Pork & Beef, pork is bought primarily by older generations.

Total Meat; Volume Share %; Jan-Sep 2023



## The Top 4 Meat products are also Top 4 in nearly all generations. But there are differences, too. Younger households are clearly convenience-oriented.

Total Meat Top Products; Volume ranking based on individual products per generation; Jan-Sep 2023

	 Reconstructors		 Baby Boomers		 Generation X		 Millennials		 iBrains
1	Chicken - Thighs	1	Mixed minced Meat	1	Chicken - Breast/Filet/Schnitzel	1	Chicken - Breast/Filet/Schnitzel	1	Mixed minced Meat
2	Mixed minced Meat	2	Chicken - Breast/Filet/Schnitzel	2	Mixed minced Meat	2	Mixed minced Meat	2	Chicken - Breast/Filet/Schnitzel
3	Chicken - Breast/Filet/Schnitzel	3	Chicken - Thighs	3	Chicken - Thighs	3	Beef - Minced Meat	3	Chicken - Thighs
4	Pork - Roast (natural)	4	Pork - Roast (natural)	4	Beef - Minced Meat	4	Chicken - Thighs	4	Beef - Minced Meat
5		5	Beef - Minced Meat	5		5		5	Chicken - Nuggets/Sticks
6	Beef - Minced Meat	6		6		6		6	Chicken Wings
7		7		7		7		7	
8		8		8		8		8	
9		9		9		9		9	
10		10		10		10		10	
11		11		11		11		11	
12		12		12		12		12	
13		13		13		13		13	
14		14		14		14		14	
15		15		15		15		15	

## Summary



### Inflation changes the attitudes of shoppers

- Almost 1/4 of households can afford almost nothing
- Price orientation continues to increase, at the expense of quality orientation
- Importance of Promotions and Private Labels increases



### Young generations think differently

- The younger generation wants to enjoy life to the full (despite the ongoing crisis) and has a different attitude to price
- The younger generation wants to eat differently
- The plant-based trend is determined by the younger generation, but the share of meat eaters is also high



### Meat and meat products currently with bright spots

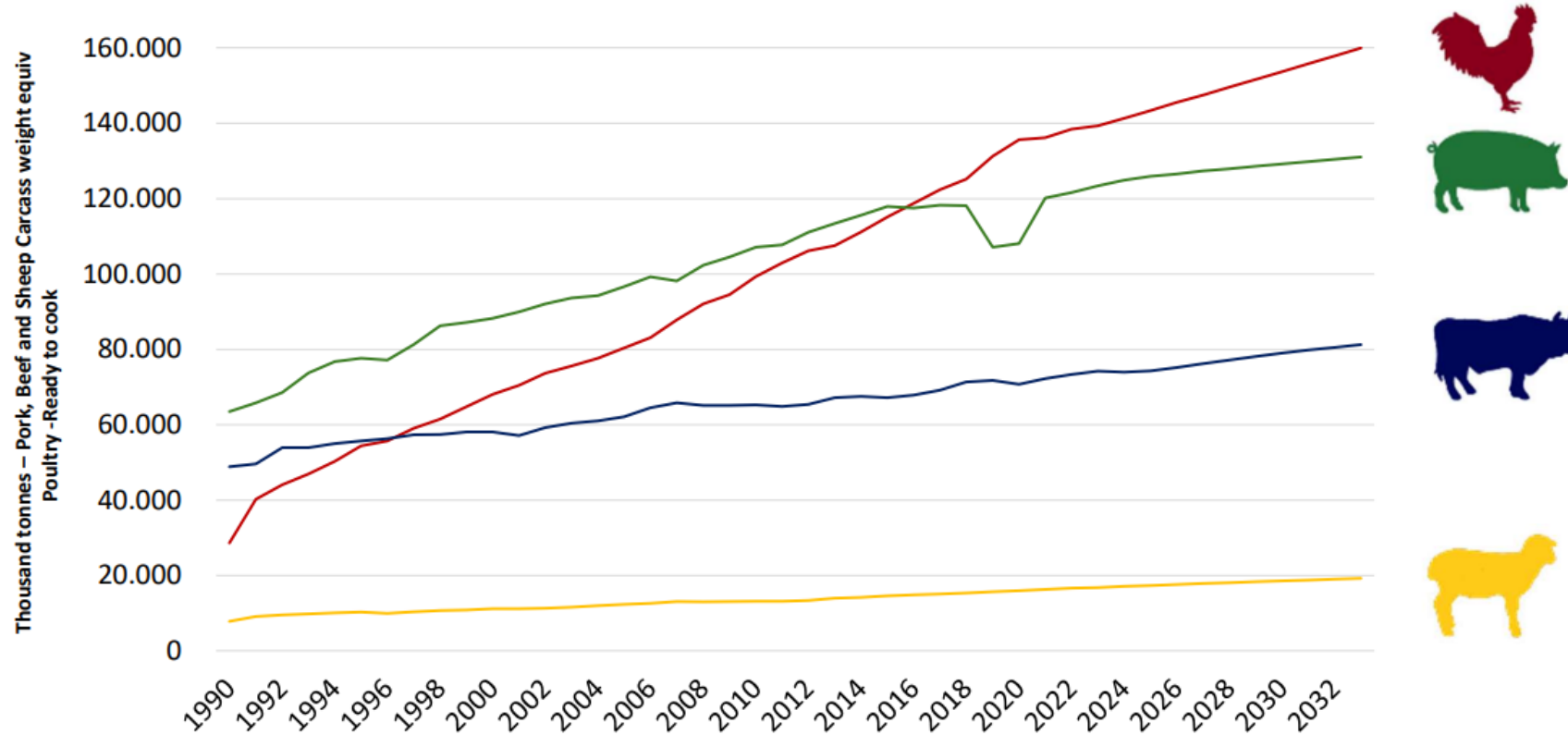
- Red Meat is still under pressure, Poultry increases and Processed Meat is stable
- Younger generations buy less meat on average
- ... but have a clear volume increase
- The generations show clear differences in their purchase behaviour of meat and meat products

**The younger generations open up challenges and opportunities at the same time. Especially convenience offers potential for meat and poultry. The younger generations are open minded... examples could be Cultured/Cultivated Meat or special cuts, new recipes and new offer forms (pork bowl instead of poke bowl or sushi with meat and/or processed meat). Animal welfare and sustainability are still important.**



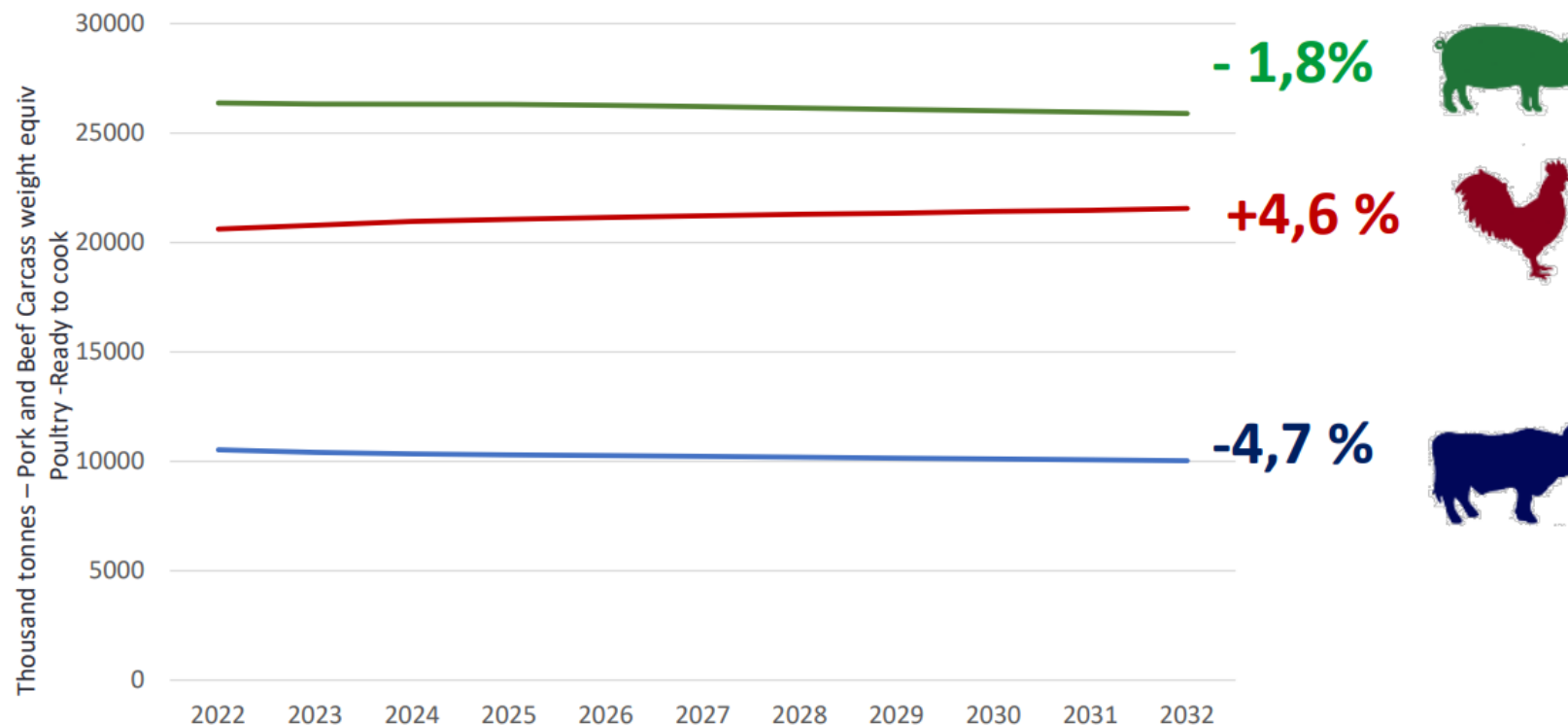
# Consumption of poultry meat continues to rise

## Meat consumption forecast - World



# Consumption of poultry meat continues to rise

## Europe Meat Consumption Forecast 2022-2032



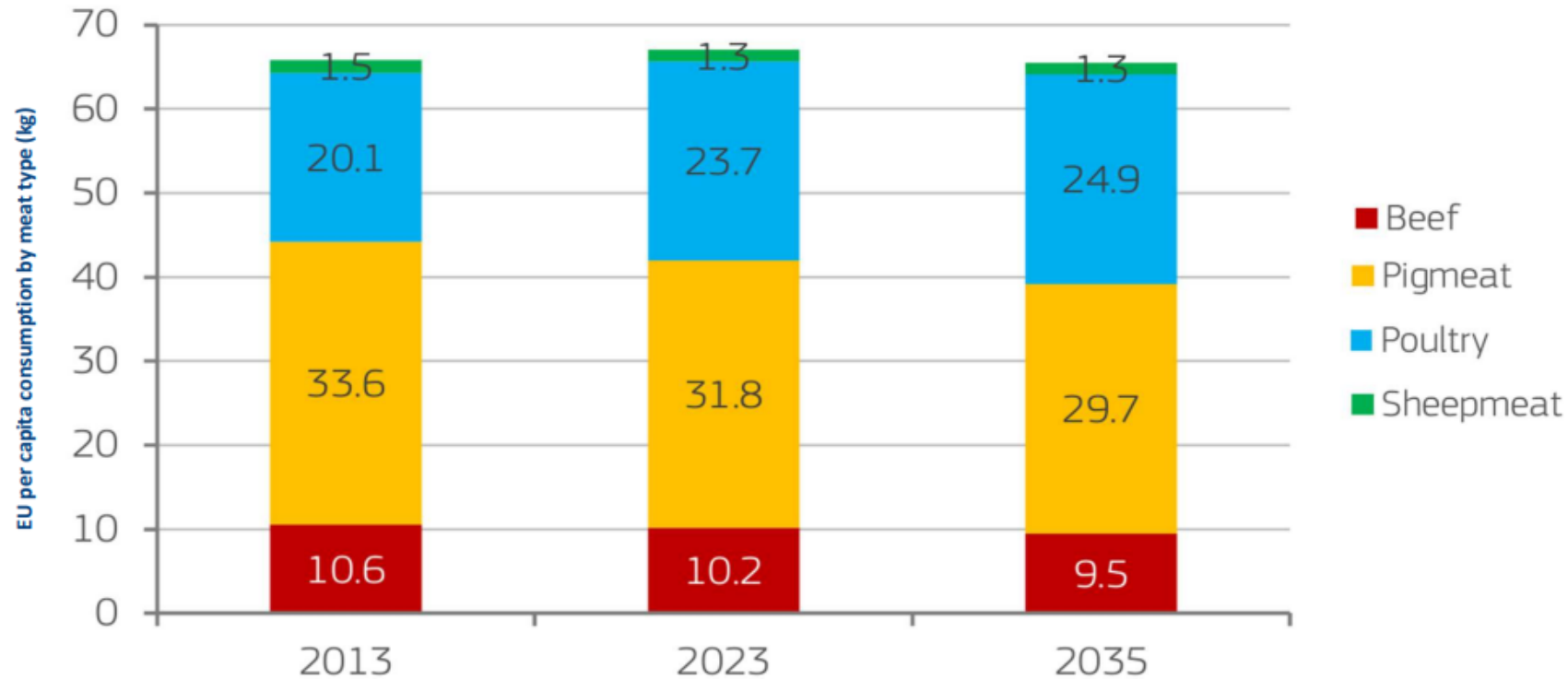
AVEC | The voice of Europe's poultry meat sector

Source: OECD-FAO Agricultural Outlook 2023-2032 - © OECD 2023



# Consumption of poultry meat continues to rise

## Meat consumption forecast - EU



Source: [EU AGRICULTURAL OUTLOOK 2023 - 2035](#)

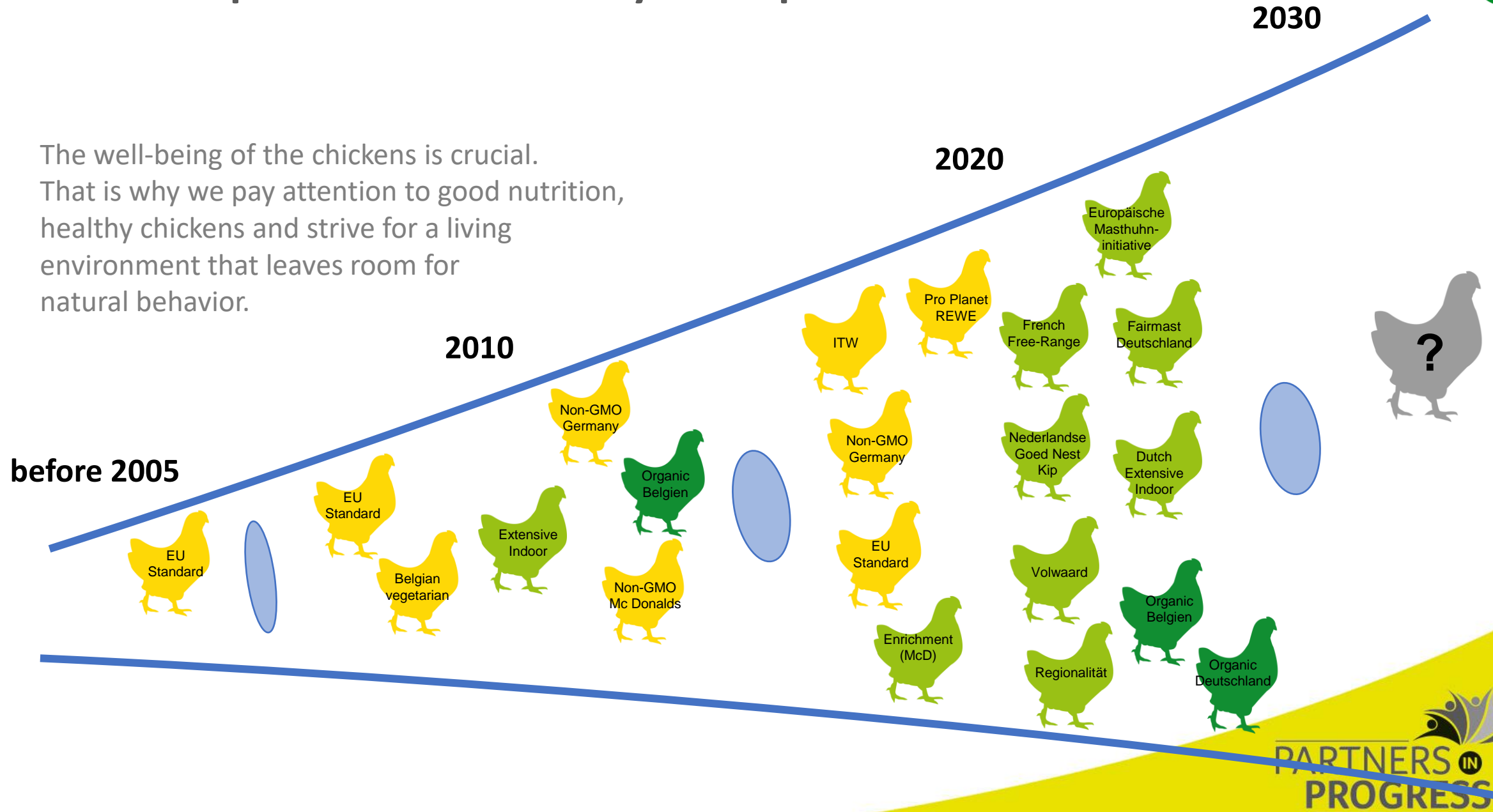


# Animal Welfare Concepts



# Plukon is a pioneer in husbandry concepts

The well-being of the chickens is crucial. That is why we pay attention to good nutrition, healthy chickens and strive for a living environment that leaves room for natural behavior.



# Long-term developments in the food retail sector

## TODAY:

approx. 20% of the fresh meat range in retail\* already comes from farming systems 3 and 4.

## BY 2025:

No more supply of fresh meat from farming method 1

## BY 2026:

Approx. 33% of the fresh meat range is to come from farming systems 3, 4 and 5.

## BY 2030:

Complete switch to fresh meat from farming systems 3, 4 and 5.

## ÄNDERUNGEN HALTUNGSFORM

- Die Haltungsformkennzeichnung wird ab Sommer 2024 an die Fünftufigkeit und die Bezeichnungen der staatlichen Tierhaltungskennzeichnung angepasst. Die Anpassung der Kriterien ist ebenfalls vorgesehen, sodass die der Haltungsform und die der staatlichen Kennzeichnung bei Schwein bei der Umsetzung (voraussichtlich 2025) identisch sind.

Haltungsform bislang vierstufig



Haltungsform ab Mitte 2024  
fünftufig + andere Bezeichnung + angepasste Anforderungen



Die fünf Stufen der Haltungsform-Kennzeichnung orientieren sich an den fünf Kategorien der staatlichen Tierhaltungskennzeichnung:



- Die Haltungsform erhält ein Logo, das nicht als Produktsiegel dient. Es wird von der Trägergesellschaft der Haltungsform-Kennzeichnung ausschließlich zu kommunikativen Zwecken, z.B. auf Briefpapier, verwendet.

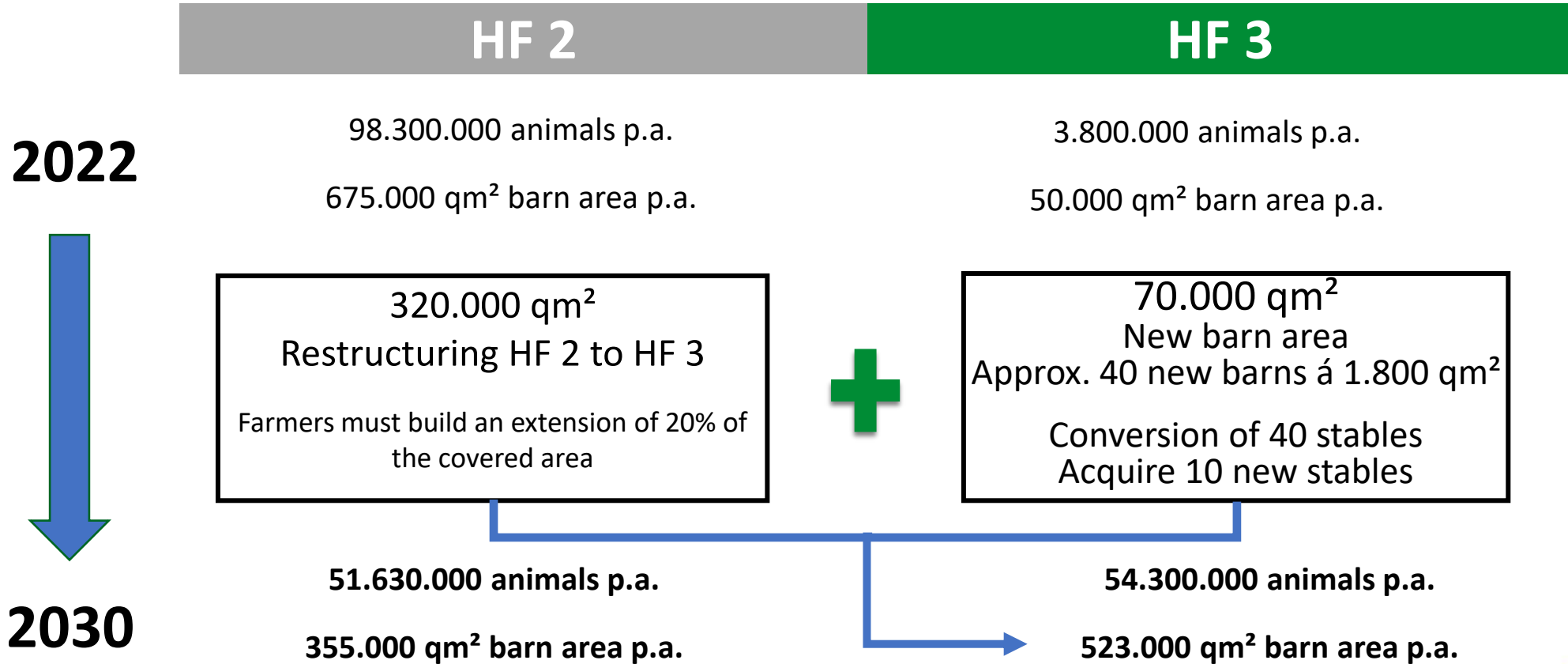
**HALTUNGSFORM**  
Haltung zeigen. Orientierung schaffen.



\* Eigene publizierte Ziele großer Lebensmitteleinzelhändler



# Restructuring HF 2 to HF 3



# Regionality

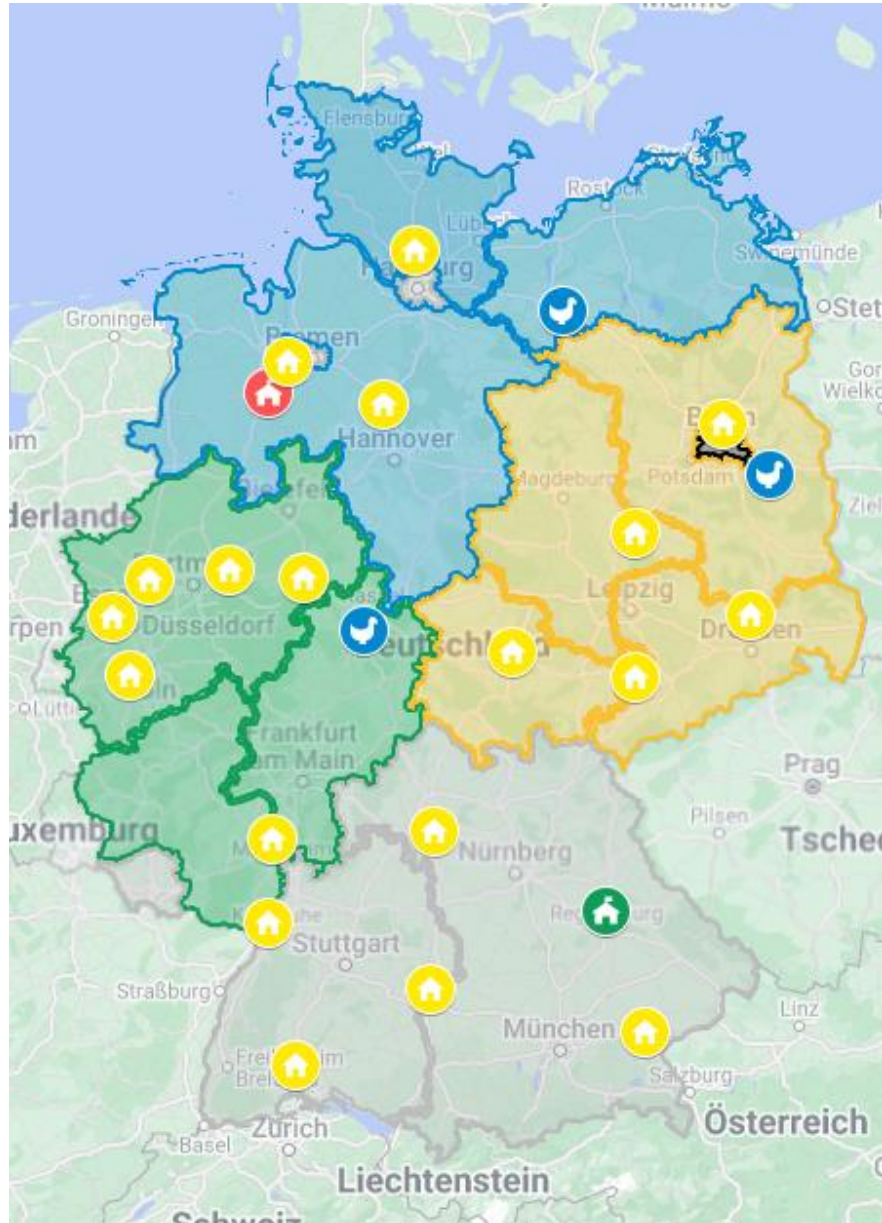


# Regionality - from farmer to customer

- Definition: Regional foods are raw materials or foods that originate from the specified region and are also processed, packaged and distributed there.
- Short distances are essential for the supply chains of fresh food.



# Regionality using the example of a food retailer



# Further demands



# Further challenges in the food industry

- Rising commodity and energy prices (volatile markets/feed costs (70%))
- Global supply chain disruptions (trade restrictions, Brexit)
- Volatility in supply and demand
- Lack of automation / technology
- Changing consumer preferences
- Availability of employees and skills shortages
- Compliance with constantly changing legal requirements
- Planning security due to legislation
- Food quality / quality standards
- Sustainability and climate change



# Questions & Answers

# THANK YOU!