



Asian Meat Market Trends: a U.S. Perspective

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October 22, 2019

The Big Drivers



- Aging populations – youth as principal demand drivers; also labour shortages
- “Healthier” eating – encompasses nutrition attributes, but also sustainable, ‘natural’, ‘local’, growing animal welfare awareness
- Cuisine experimentation – more menu choices, more competition for red meat
- “New Retail” – purchasing anything, anywhere, anytime
- Convenience – shorter meal prep times; meals on the go & alone



Traditions persist



- Penchant for fresh – wet markets still thrive, esp in Greater China region, and regardless of income; frozen & chilled discounted (outside of Japan & Korea)
- Price sensitivity – esp for daily proteins, but also for e-commerce
- Wet cooking over dry cooking – ovens still not ubiquitous, except microwaves
- Fast food, but local flavours
- Traditional meat products – mince market undeveloped



Black Swans: ASF to reshape Asian meat consumption: "Its better to eat less pork"



□人民日报社主管 环球时报社主办 □第1347期 □2019年9月10日 星期二 □本期24版 □零售价3元 □邮发代号1-109

脂肪和胆固醇含量高,过多食用易长胖,而胆固醇会给血管和心脏增加负担,易诱发血管硬化等问题

猪肉还是少吃为好

受访专家: □中国畜牧兽医学会养猪分会副理事长 王楚娟 □中国农业大学经济管理学院教授 白志勇 □武汉市中心医院临床营养科副主任医师 井淑芳

本报记者 李安 张燕



“两个月，猪肉一斤才八九元，现在都涨到二十多元了，翻了一倍。”山西晋南的张女士告诉《生命时报》记者。厦门市的林先生说：“不仅自己吃不起猪肉了，连快餐店酒席都向顾客抱怨‘五花肉缺货了’。”

7月以来，猪肉价格大幅上涨引发高度关注。近期，从中央到地方都相继出台了相关政策。8月30日召开的全国稳住生猪生产保障市场供应电视电话会议中强调，要强化市场监管监测预警，严厉打击囤积居奇和串通涨价等不法行为；鼓励推进生猪产能调控，强化防止市场供应出现大幅缺口和价格飞涨的祸源等。

9月4日，财政部、农业农村部联合发布通知，2019年中央财政将增加生猪调出大县奖励资金规模，激励地方尽快将增产潜力转化为实际产能。截至目前，已有近十个省市出台相关政策，采取现金、补贴、贷款贴息等猪肉等多种



猪肉价格一路上涨

记者在农业农村部信息中心查询“最新国内猪肉批发价格波动情况”发现，从今年2月开始，全国猪肉批发价格就一直上涨，从2月的18.19元/公斤，涨到9月的34.87元/公斤，而去年9月的同期价格为19.95元/公斤。其中，6月猪肉批发价格为21.63元/公斤，对比2月价格，4个月内涨了3.44元；到了9月份，仅两个月，价格就又上涨了13.24元。

9月4日，记者在北京市朝阳区农科北路菜市场了解到，普通的猪肉价格是23元/斤，在朝阳区万福超市里，经过初期囤积后，猪肉卖到了34.8元/斤。一位商家告诉记者，最近一个月猪肉价格一直在涨，每天的销售量也不断下降。不过，猪肉供应很稳定。超市工作人员介绍道，受猪肉价格上涨的影响，牛、羊肉价格也都有上涨，鸡肉比较稳定，没涨价。

猪肉涨价原因何在？河北省廊坊市的张女士已从事生猪养殖十余年，她介绍称，从去年年底开始，她的养猪厂就遭遇了“寒冬”，因受非洲猪瘟的冲击，一直没有扩大养殖规模，在今年春节前，她还将猪场的3000多头猪全部销售。“一些地区的养猪厂也有与我们厂相似的情况，市场上生猪供给紧张，猪肉价格自然会上涨。7月以来猪肉价格上涨，其实也与一些养殖户退出市场有关。我认识的几个养殖户，他们都是想趁猪价涨又担心非洲猪瘟爆发时卖猪，一旦发生风险，养殖户要承担很大损失。”张女士说。

农业农村部市场与信息化司运行调控处处长赵亚平近日接受新华社采访时表示，这轮猪价上涨并非单纯疫情与周期性因素叠加的结果。本轮生猪价格于2018年5月跌至周期低点后步入新一轮上涨通道，之前受非洲猪瘟疫情影响，生猪产能下降明显，猪价短暂调整后持续较快上涨。不过，随着疫情控制取得阶段性成效，生猪生产和运输秩序将逐步恢复，全国猪肉市场供应将增加。中国畜牧兽医学会猪分会理事长张福生教授表示，猪繁殖较快，现在已有许多公司把商品母猪的母体留下来配种，到明年这个时候产能就会释放出来。（下转4版）

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- 老人做手术,年龄不是禁忌 (14版)
- 三款内肝药严重伤肝 (17版)
- 有些保鲜膜不能进微波炉 (6版)

本期导读

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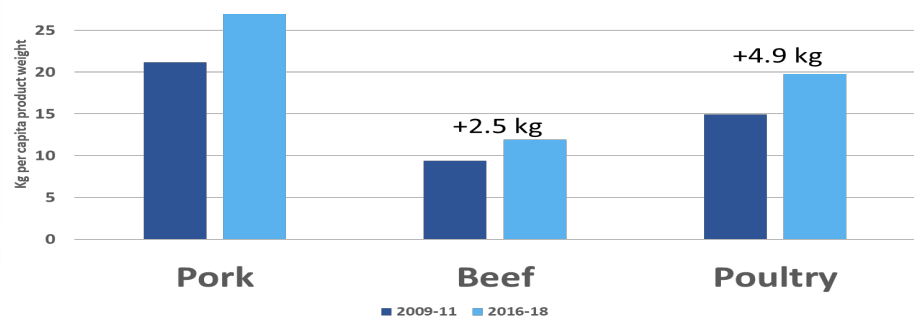
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	Per Capita Consumption (2016 and 2018est)	U.S. Share of Total Beef Consumption (2016 and 2018est)
Japan	6.7 kg to 7.5 kg	23% to 27%
Korea	11.5 kg to 12.5 kg	27% to 33%
Taiwan	4.67 kg to 5.35 kg	38% to 42%
China HK	4.2 kg to 4.33 kg	2% 17% to 18%
Mexico	14 kg to 14.15 kg	9%
Canada	18.4 kg to 18.9 kg	15%

Korea's Per Capita Meat Consumption



Competitiveness is about cuts



- short plate
- TBM
- short rib b/less
- ribeye
- tenderloin
- chuck roll
- finger meat

- chuck eye roll
- striploin
- heel muscle
- bone-in short rib
- culottes
- inside skirts
- outsides skirts
- hanging Tenders

- clod hearts
- top butts
- ball Tips
- trip-tips
- chuck Tender
- flank
- brisket
- sirloin Flap
- eye of round

- knuckles
- inside rounds
- outside rounds

Chilled vs. frozen:



VS



U.S. More Competitive



U.S. Less Competitive



Especially for pork



- bls picnics;
- bone-in shoulders;
- bls hams;
- bone-in hams;
- tongues;
- ears;
- front/hind feet;
- stomachs;
- neckbones;
- carcasses

- bls butts (Brazil);
- loin complex (Brazil);
- hearts (EU)

- bone in middles (EU);
- spare ribs
- hocks;
- kidneys (Canada);

- bellies (EU)

Japan:
A special case



U.S. More Competitive



U.S. Less Competitive



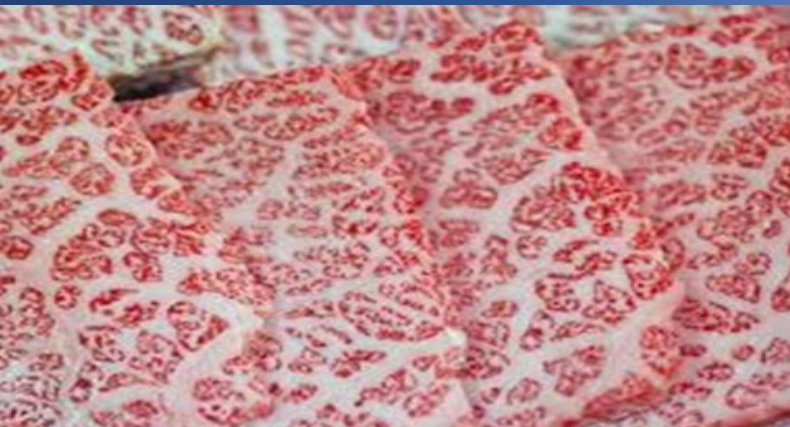
Most U.S. volume is narrow range of cuts



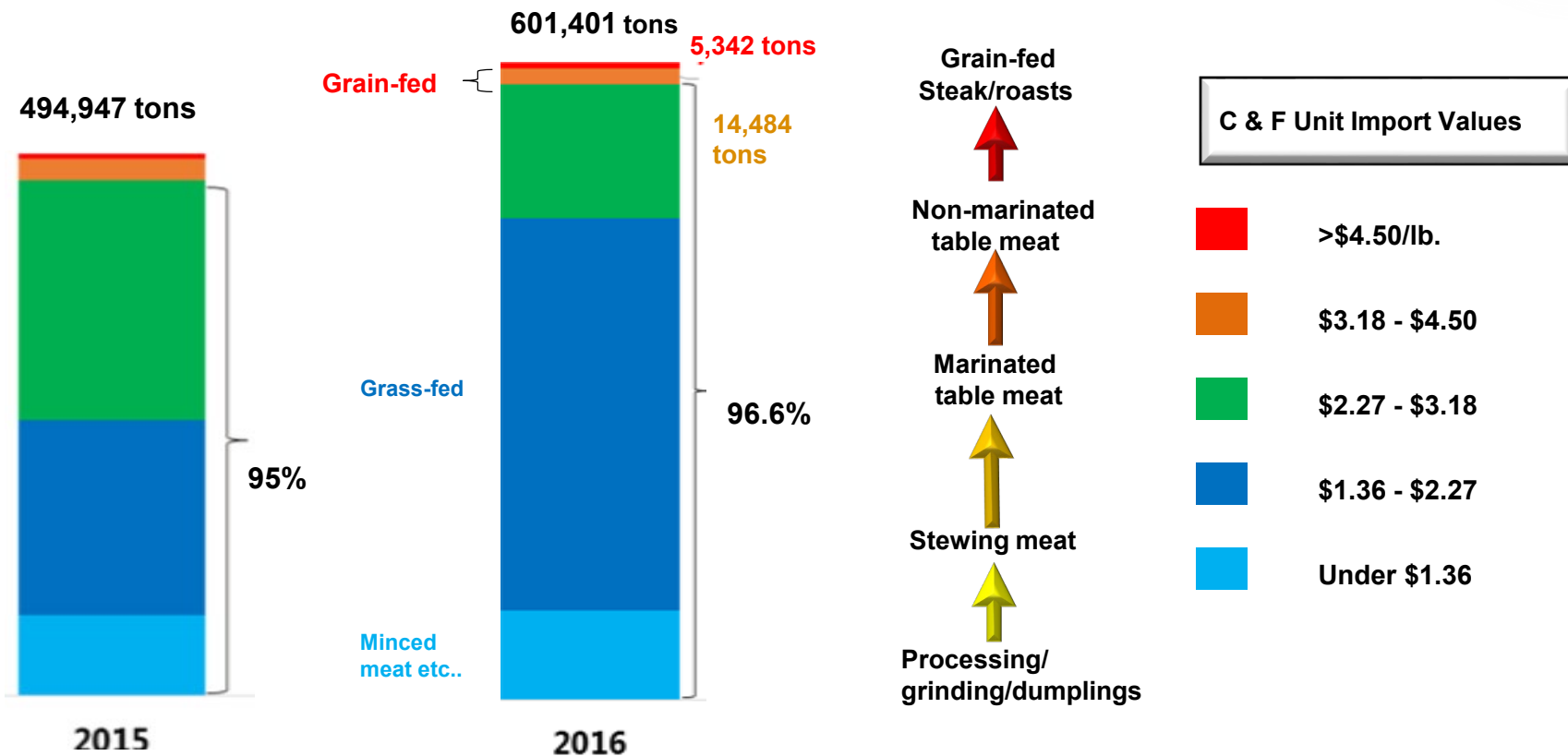


U.S.A.	US Wagyu										USDA PRIME					USDA CHOICE					USDA SELECT																			
Japan Wagyu	A5					A4					A3					A2					A1																			
	12	11	10	9	8	7	6	5	4	3	2	1																												
Australia						M9	M8	M7	M6	M5	M4	M3	M2	M1																										
						←		Aust. Wagyu	←		Grain Fed 100 Days & above					S A																								
Canada																PRIME					AAA					AA					A									
New Zealand																Grain Fed 100 days & above										PS					B					C				
Uruguay																										Grain Fed					✓									
Argentina																										Grain Fed					✓									
Brazil																															✓									

Consumer interest in “the best” in beef, lamb, and pork; but faddish



Most products move at lower prices (value stratification of PRC beef imports)



Typical fast moving meat items; Dah Chong Hong Food Mart: HK

本周熱賣



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美國特級肥牛片160克/



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本周熱賣



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USDA PRIME ribeye:	RMB 240-350
Australian long-fed F1 Wagyu-Angus cross ribeye:	RMB 280
Australian grain-fed ribeye (trimmed):	RMB 195
US CAB ribeye:	RMB 180
Canadian AA ribeye:	RMB 158
New Zealand ribeye (yearling; non-marinated):	RMB 145
Canadian AAA striploin:	RMB 125
Canadian AA striploin:	RMB 115
US CAB chuck eye steak:	RMB 100-110
Canadian BI short ribs:	RMB 100
Australian grain-fed top blade:	RMB 95
New Zealand striploin (yearling; non-marinated):	RMB 95
USDA CHOICE tri tip:	RMB 95
USDA CHOICE chuck roll:	RMB 90
Australian grass fed cube roll (ribeye):	RMB 82
Uruguay top blade steak, grass fed:	RMB 80
Argentina grass fed ribeye:	RMB 75
Australian grass fed striploin:	RMB 75
NZ grass fed ribeye:	RMB 75
Uruguay grass fed ribeye:	RMB 75
USDA CHOICE clod heart steak:	RMB 75
Argentina grass fed striploin:	RMB 65
Canadian grain fed chuck roll:	RMB 65
New Zealand striploin:	RMB 65
Brazilian cube roll (ribeye):	RMB 62

Minced beef
market small

Hot pot & BBQ driving regional demand for grain-fed beef

BBQ 烧烤



烤肥牛
Fillet Beef



烤羊肉
Lamb Meat

烤牛仔骨
Marinated Beef Short Rib

秘制牛排
Steak W. House Special Sauce

烤牛排
Sirloin Steak



烤牛舌
Beef Tongue

烤咖喱鸡柳
Curry Chicken Breast Strip

烤鸡翅
Chicken Wings

烤鸡胗
Chicken Gizzard



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Asian "Niku boom"; meat portions are getting bigger; more meat concept restaurants



The way people are eating out is changing













Retail: neighbourhood stores & wet markets thrive “we don’t sell yesterday’s meat”



Online beef sales flourishing but from small base



 <p>¥89.00</p> <p>【大希地】牛排套餐团购黑椒开心家庭大希地旗舰店</p> <p>月成交 7.3万笔 评价 42万</p>	 <p>¥198.00</p> <p>?绝世澳洲家庭原肉整切牛排套餐黑椒牛绝世食品旗舰店</p> <p>月成交 2.6万笔 评价 20万</p>	 <p>¥198.00</p> <p>?小牛凯西澳洲原肉整切牛排套餐黑椒1小生凯西旗舰店</p> <p>月成交 5.6万笔 评价 21万</p>	 <p>¥279.00</p> <p>澳洲整原切牛排牛扒厚肉儿童西冷肩胛生百老旗舰店</p> <p>月成交 1.3万笔 评价 3.5万</p>	 <p>¥199.00</p> <p>【大希地】家庭牛排新鲜生牛肉扒原肉大希地旗舰店</p> <p>月成交 4.0万笔 评价 13万</p>
 <p>¥119.00</p> <p>?贡若牛排套餐团购家庭牛扒10片澳洲顶诺食品旗舰店</p> <p>月成交 6042笔 评价 8.0万</p>	 <p>¥139.00</p> <p>【牛排黑椒20片】恒都澳洲菲力牛排新恒都七月专卖</p> <p>月成交 1.0万笔 评价 7533</p>	 <p>¥319.00</p> <p>澳嘉厚切澳洲安格斯谷饲200天M3+级澳嘉旗舰店</p> <p>月成交 1537笔 评价 4713</p>	 <p>¥238.00</p> <p>西捷澳洲原切牛排雪花进口套餐生鲜牛西捷旗舰店</p> <p>月成交 4432笔 评价 3.1万</p>	 <p>¥128.00</p> <p>绝世澳洲家庭牛排套餐10片生新鲜牛绝世食品旗舰店</p> <p>月成交 3910笔 评价 3.6万</p>

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本来生活

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中国家庭的优质食品购买平台

Beef merchandising still needs work, but improving



Higher labour costs means more portion control & skin packsand convenience



Can traditional wholesaling move online? (Korea: CJ Freshway's Meat Friends)



ALL 냉동
[베슬러(NI 10078)]삼겹살 - 독
일
Kg당 **7,200 원**
재고 20박스

카드불가 무료배송 이벤트

ALL 냉동
[엑셀(86K)]아이(등심) -
Ungrade / 미국
Kg당 **17,500 원**
재고 10박스

카드가능 무료배송 이벤트

ALL 냉동
[엑셀(354)]LA갈비 - Choice /
미국
Kg당 **15,700 원**
재고 10박스

카드가능 무료배송 이벤트

ALL 냉동
[엑셀(86M)]립엔드 - Choice /
미국
Kg당 **9,300 원**
재고 4박스

카드가능 무료배송 이벤트

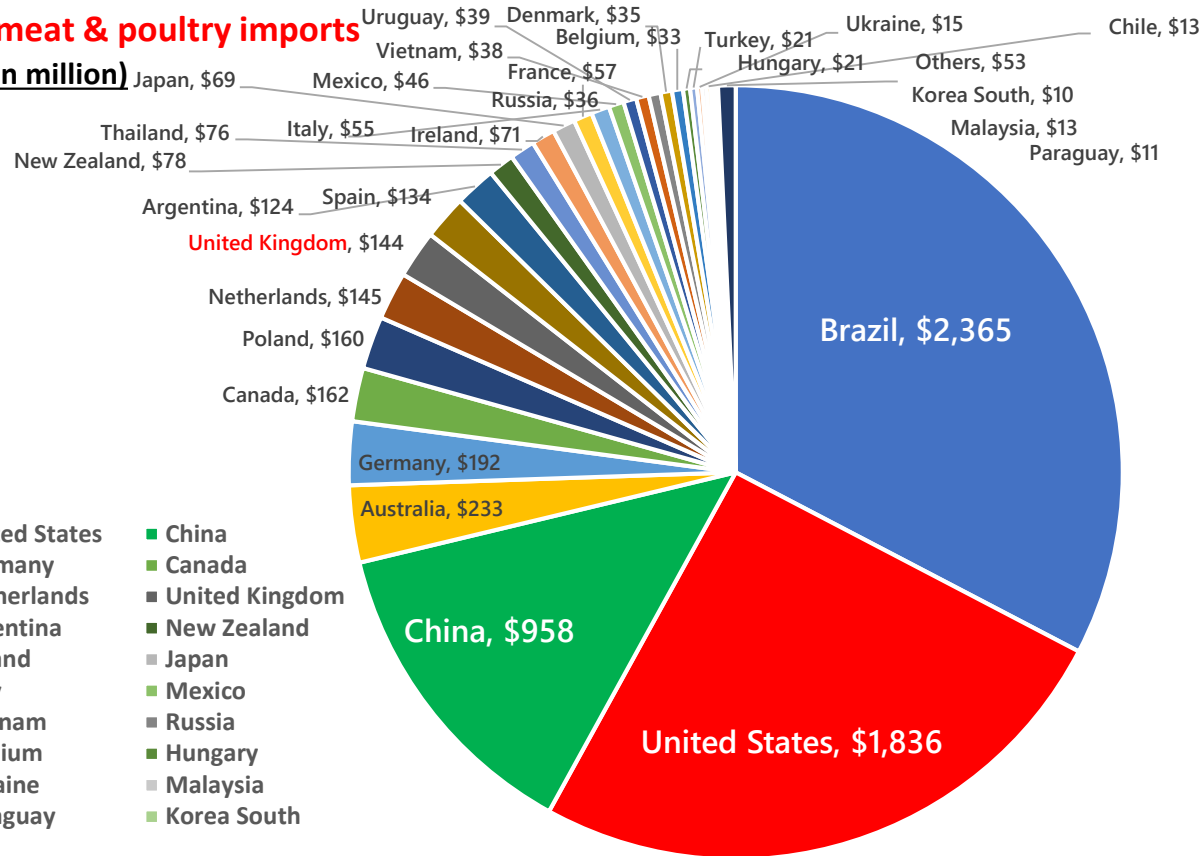
Questions?

HK: world's most competitive meat markets



Hong Kong: total meat & poultry imports

Jan - Dec 2018 (US\$ in million)



- Brazil
- United States
- China
- Australia
- Germany
- Canada
- Poland
- Netherlands
- United Kingdom
- Spain
- Argentina
- New Zealand
- Thailand
- Ireland
- Japan
- France
- Italy
- Mexico
- Uruguay
- Vietnam
- Russia
- Denmark
- Belgium
- Hungary
- Turkey
- Ukraine
- Malaysia
- Chile
- Paraguay
- Korea South
- Others