

Mapping of the Dutch Market for Mechanically Separated Meat

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Introduction

Foodwatch wishes to identify key players and products in the Dutch market for mechanically separated meat (MSM).

Since the data availability and accessibility on the topic is unclear, a preliminary evaluation on the feasibility of answering the research questions is provided to the client. Based on these initial findings, a decision will be taken whether it is meaningful to continue the research.

This note provides the preliminary evaluation.

In the searched documents and websites, the relevant products may be referred to as mechanically separated meat (MSM), mechanically recovered meat (MRM), mechanically deboned meat (MDM) or as “separatorvlees” (the common Dutch designation). In this note the abbreviation MSM is used.

Furthermore, the Dutch government and other EU member states use different definitions of MSM meat.¹ In this note the Dutch interpretation is used since the research is done for Foodwatch Netherlands. The Dutch interpretation is broader than that of the other EU member states in the sense that it includes “baadervlees”, which is also called Desinewed Minced Meat (DMM) or 3MM meat.

The key actors in the Dutch MSM market are producers of MSM and processors of MSM.

1 Who are the key actors in the Dutch MSM market?

The aim is to identify key companies producing and marketing MSM meat in the Netherlands. To answer this question, information was sought on company websites, in publications by relevant public authorities, in market research, media articles and other relevant sources.

1.1 Producers of MSM

1.1.1 Companies with NVWA accreditation

The website of the Dutch Food and Consumer Product Safety Authority (NVWA) contains a list of the companies that received an accreditation for the production of mechanically separated meat on the basis of Regulation (EC) no. 853/2004.² These companies do not however all actually produce MSM. The Expertisecentrum Voedingsmiddelenindustrie says that, in 2013, there were 20 producers of MSM.³ The meat industry has seen quite some consolidation, of which the result could be that there are less companies producing MSM today.

The list contains 38 companies. Of these at least the following nine companies produce MSM:

- Dopa, a poultry processing company. It produces ‘baader’ meat according to their Dutch website and refers to this product as MDM/MSM on their English website.⁴

- Food Today/Poeliersbedrijf Ep de Graaf, a poultry processing company with approximately 200 employees. The products vary from approximately 250 tonnes of fresh chicken breast fillets per week, to chicken wings, semi-finished products like baader and MDM to frozen products like Halal chicken burgers and fricandelles.⁵
- HOVU⁶, a company that is connected to Christ Lommers. Christ Lommers Vleesveredeling (a company that is in the NVWA list) is a family business that has been specializing in the boning of pork ham for many years. They supply products to national and international customers for further processing. Hovu production company was started in 1983, processing pork into mechanically separated meat.⁷
- J.A. ter Maten Pluimveebedrijf⁸, a poultry processing company. It produces both for the human food processing industry, but also for the pet industry.
- Polskamp, a company, specialised in the separation of chicken meat from bone. It has four products: MSM, 3 millimeter 'baader' meat), chicken fat and low-fat skins. Polskamp is a big company in the sector, possibly even the largest producer of poultry MSM in the world.⁹
- Pluimveeverwerkende-Industrie De Vries¹⁰, a poultry processing company with a weekly production of 150 tonnes of fresh and frozen products.
- Tomassen Duck-To, producer of freshly frozen Peking ducks and duck parts. It produces mechanically deboned duck meat.¹¹
- Vion Scherpenzeel, a food company. It produces MSM, according to an audit report from 2015.¹²
- Wijnen Meat, taken over by PALI Meat in September 2019, is a pork processing company, that produces DMM ('baader' meat), amongst others. The company processes around 600 tonnes of pork meat per week.¹³

Regarding the following companies it is unsure, but likely, that they produce MSM:

- Broviand, a poultry processing company, which may produce MSM, but this could not be confirmed.¹⁴
- Dutch Chicken, a poultry processing company. It processes chicken and produces chicken frankfurters amongst others.¹⁵

1.1.2 Companies without NVWA accreditation

There are also companies producing MSM in other countries but marketing it in the Netherlands. These are not in the list of companies that received an accreditation. An internet search leads for example to:

- Trinity Progress (previously Trinity) is the German subsidiary of the Dutch company Trinity, which operates a trade division in Oldenzaal.¹⁶ The company was linked to a scandal around rotten meat that went before court in 2017.¹⁷ Trinity GmbH is specialized in the processing of poultry meat. It produces around 2,000 tonnes of meat every week. The majority consists of 3mm baader meat and 1mm MSM (Mechanically Separated Meat).¹⁸

There are also companies producing MSM in the Netherlands that are not in the list of companies that received an accreditation. An internet search leads for example to:

- Westfort Vleesproducten; this company is middle sized. It used to be Egbert Kruiswijk Vleesproducten. On its website MSM is not mentioned, however, the LinkedIn page refers to it.¹⁹ It could mean that they process MSM or that the profile has not been updated.

2 How is MSM meat used?

The aim is to identify key destinations for the MSM meat produced and consumed on the Dutch market. This question looks specifically at the supply chain of MSM meat, i.e. whether the MSM producers identified in section 0 also produce the end products or whether MSM meat is supplied to other processors who in turn supply the consumer market.

Mechanically separated meat is one of the cheapest meat products and it is mainly used in the Netherlands as a raw material for deep-frying snacks. It is also processed as a raw material in the production of (pet) feeds.²⁰

Mechanically separated meat is processed in all kinds of meat products, such as:

- Fricandelles (minced-meat hot dogs);
- All kinds of sausages, such as frankfurters, smoked sausages and bratwurst;
- Smac (a Unilever product);
- Frozen burgers;
- Frozen chicken satay;
- Slavinken (stuffed beef rolls)²¹

2.1 Processors of MSM

Producers of the meat products mentioned above process mechanically separated meat. However, this is rarely mentioned on websites. Examples of such companies are:²²

- Beckers, a snacks company, the inventor of the fricandelle. The product contains 58% poultry MSM.²³
- Mekka Foods, a market leader in halal frozen food. It produces fricandelles and burgers made from MSM, for example.²⁴
- Mora, a snacks company. It uses MSM in various snacks.²⁵
- Unilever, a leading producer of fast-moving producer goods (FMCG). Especially products of its UNOX brand, like sausages and SMAC, contain MSM. In the case of SMAC, the ingredient list states 20% pork MSM and 31% poultry MSM.²⁶ Poultry wiener sausages ("Kip Knaks") contain 26% poultry MSM.²⁷

3 Recommendations for further research

The quick scan of MSM producers and processors on the Dutch market identified a range of companies involved in the supply chain. While a total of 38 companies currently holds approval for MSM production, the publicly available information suggests that not all these companies may be actively producing. However, due to a lack of transparency, considerable uncertainties remain about volumes produced, sold, and processed into end products remain as well as supply chain relationships. As there is no obligation to report in detail on production and sales volumes and because MSM producing companies are privately-owned with little reporting obligations, a detailed mapping of the sector remains difficult and time-consuming. While additional desk research may allow to identify some more information, it is unlikely that a full sector mapping is possible based on publicly available information. Identifying supply chain relationships would require other research methods, such as interviews, store visits and on the ground research.

As regards the processing into consumer products, this is sometimes done by the MSM producers themselves, but also involves a group of downstream companies. Possibilities to identify products containing MSM depend on where they are sold. While it can be assumed that relevant products, such as fricandelles or sausages, sold through food service (e.g. fast food stores or canteens) contain MSM, this can be confirmed more easily for packaged products sold in supermarkets.

For key packaged products, the share of MSM in the ingredient list could be used to estimate the volume of MSM processed.

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