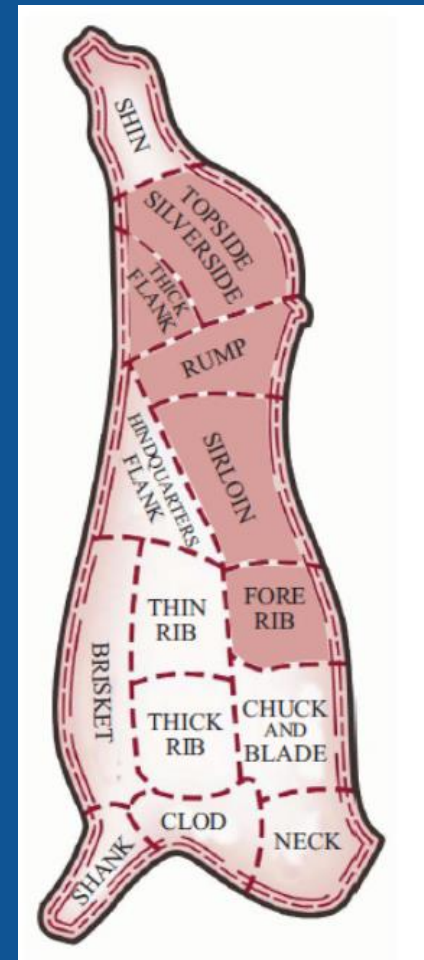


# **Preliminary results on the estimation of beef and veal production pattern and consumption in EU using SEUROP grid.**

# METHOD

- 1. Internal production is estimated starting from EUROSTAT data (production and c.w.) analysed using the cut calculator developed by AHDB to obtain the saleable yield and retail weight;**
- 2. Three categories are considered: primal cut, meat for preparation and processing and veal;**
- 3. Import/export data grouped into the same categories according to value and expert consultation; retail weight is obtained using coefficients available in the literature (Russo et al., 2017);**
- 4. To estimate final consumption, a further reduction of 12% is applied to take into account retail and domestic losses.**

- Primal cuts: **sirloin, fillet, rump, rump tail, forerib, topside, silverside;** (only from animals with conformation E-U-R and 1/3 of O)
- Preparation and processing: **brisket, neck, chuck, feather, thick flank, shin, clod, LMC, leg, heel, lean trim (+ the other 7 for 2/3 of class O) + all production for P class in all categories.**

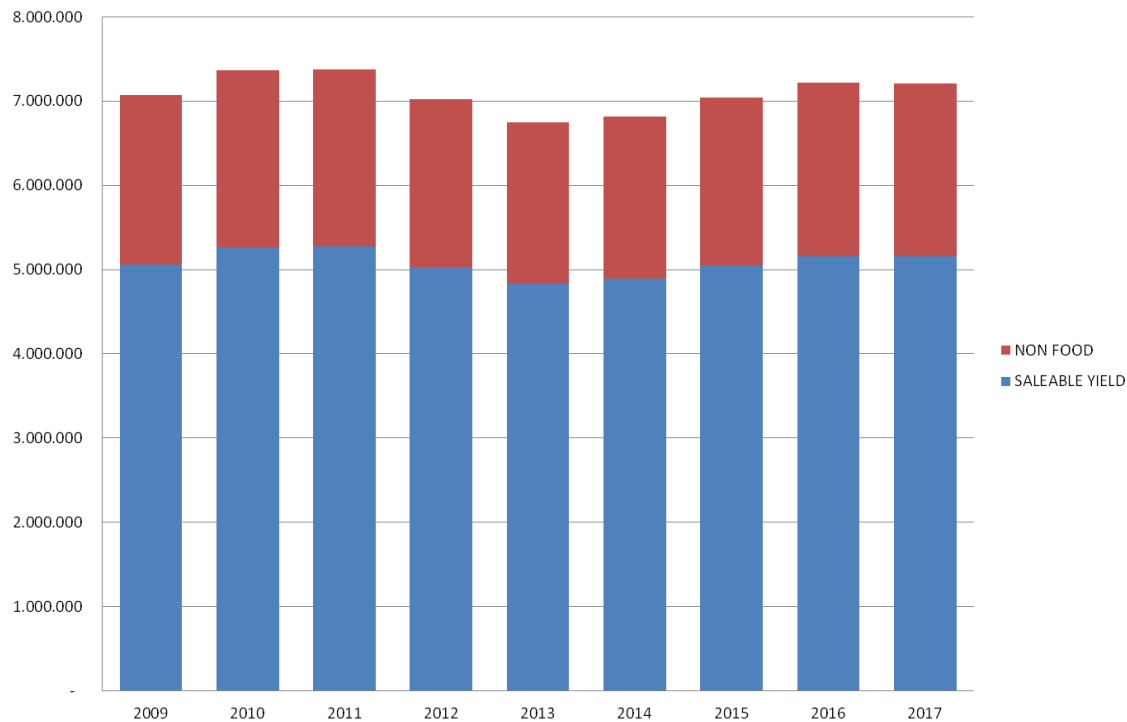




# **PRELIMINARY RESULTS**

**(data for 2017 are still preliminary – still notification on SEUROP data missing from some MS)**

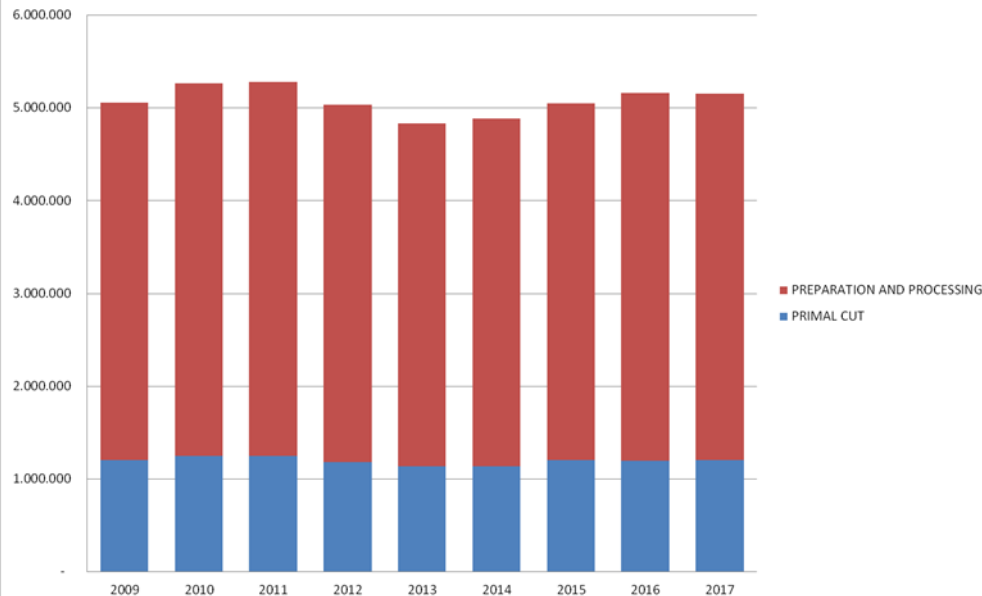
EU BEEF PRODUCTION IN TONS CARCASS WEIGHT AND SALEABLE YIELD



**Total EU production expressed in c.w. in 2017 was 7.210.323**

**Saleable yield represent around 71.6 % of the total production.**

PATTERN OF BEEF SALEABLE YIELD IN TONS



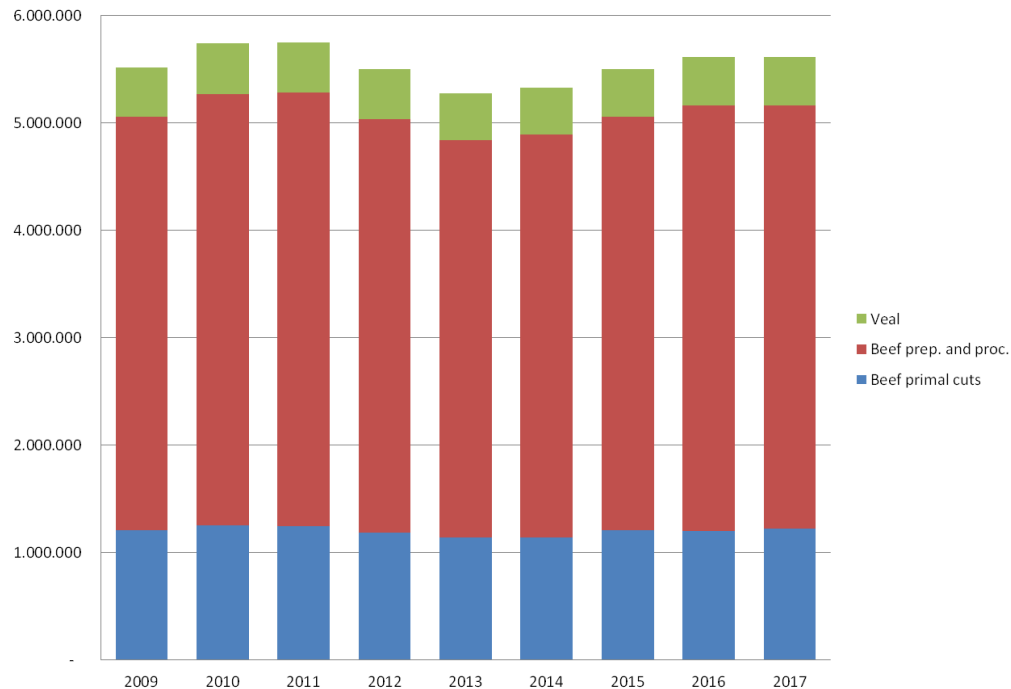
**Total BOVINE saleable yield in 2017 was 5.162.204 t.**

- **76 % prep. and proc.**
- **24 % primal cuts**

**As percentage of c.w.**

- **54,5% prep. and proc.**
- **17% primal cuts**
- **28,5 % non food**

Production of beef and veal sealable yield in the EU



**Includind veal, total saleable yield in 2017 was 5.609.231 t.**

- **70,5 % prep. and proc.**
- **21,5 % primal cuts**
- **8 % veal**

**As percentage of c.w.**

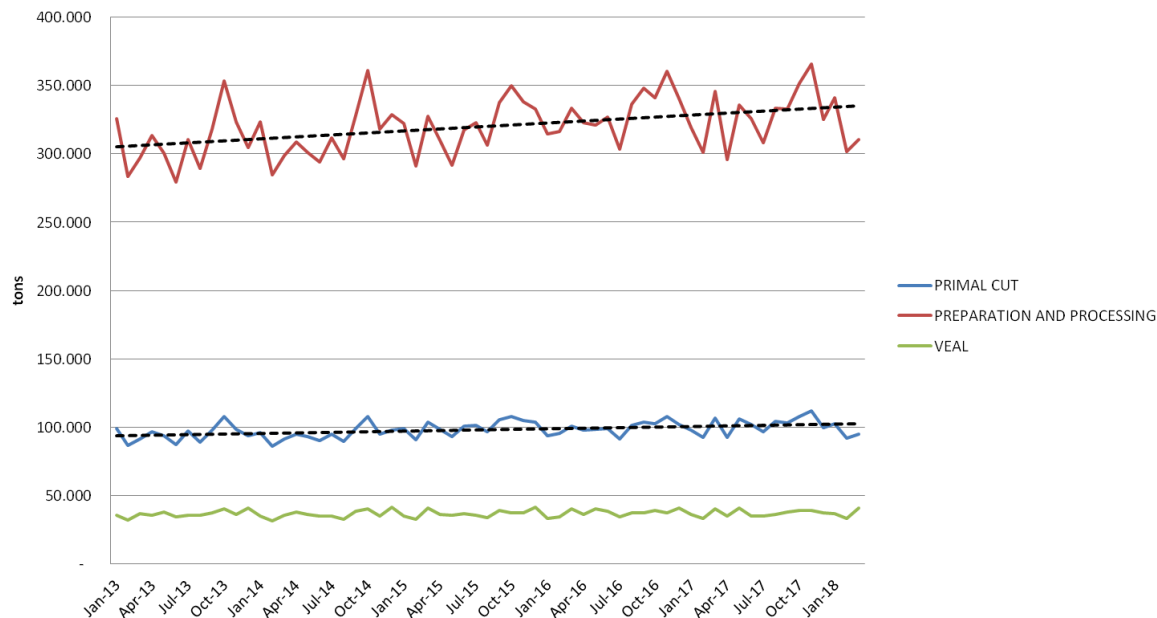
- **50 % prep. and proc.**
- **15 % primal cuts**
- **5,7 % veal**
- **28,5 % non food**





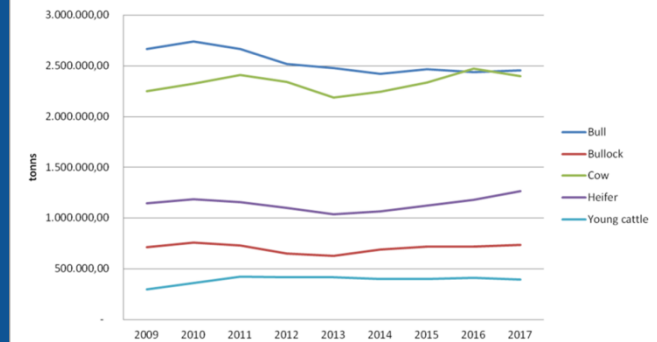
European  
Commission

Monthly evolution of EU production pattern 2013-2017



**Recovery of production has been mainly driven by meat for preparation and processing.**

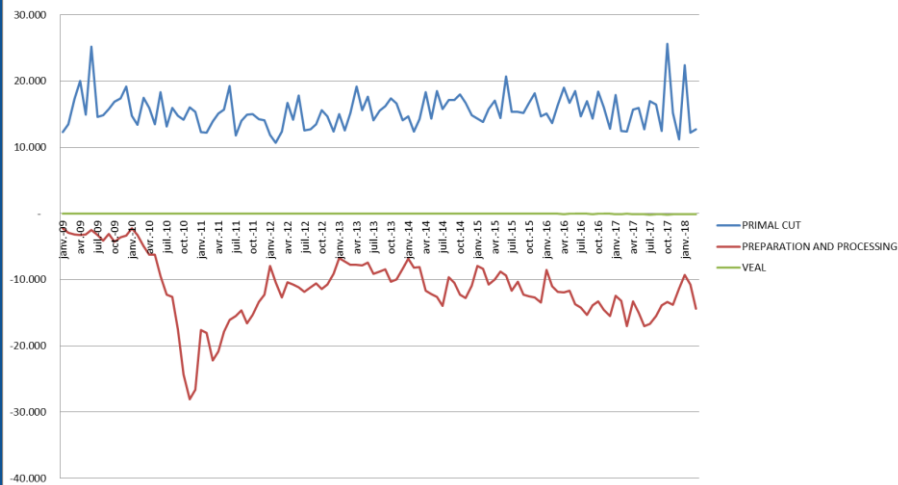
c.w. production for the different categories





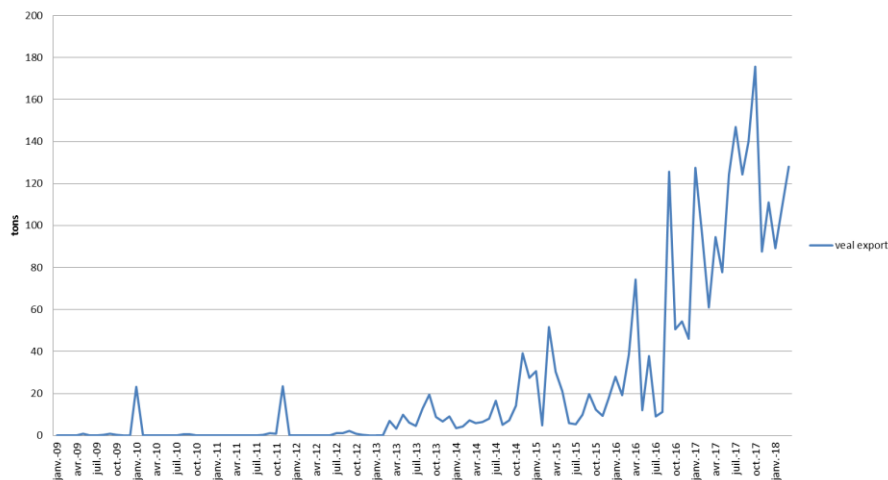
European  
Commission

Monthly evolution of beef and veal I/E balance



**I/E net balance for the different categories in corrected product weight.**

Possible veal export according to export value and specific destination

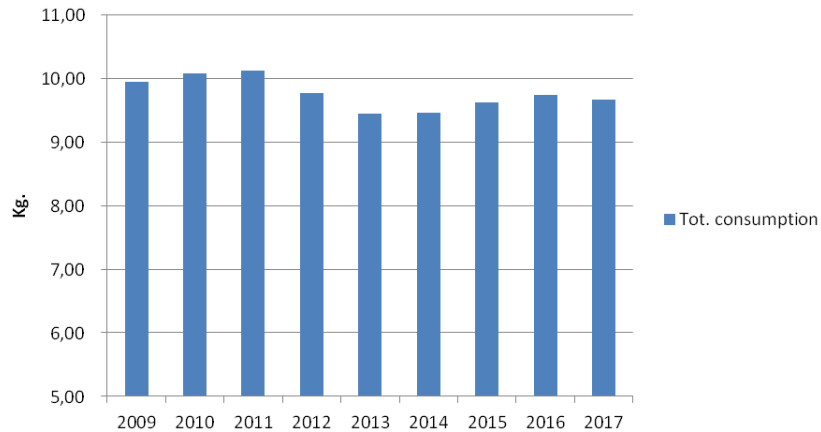


**High Value Export (veal?) to USA, Canada and Japan from NL, FR, BE, DE and IT.**



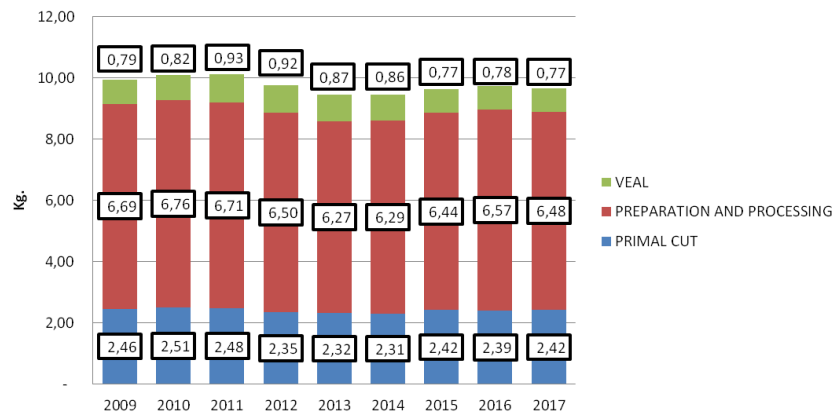
European  
Commission

### Per capita consumption of beef and veal in EU



**Total 2017 estimated  
per-capita consumption:  
9,66 kg**

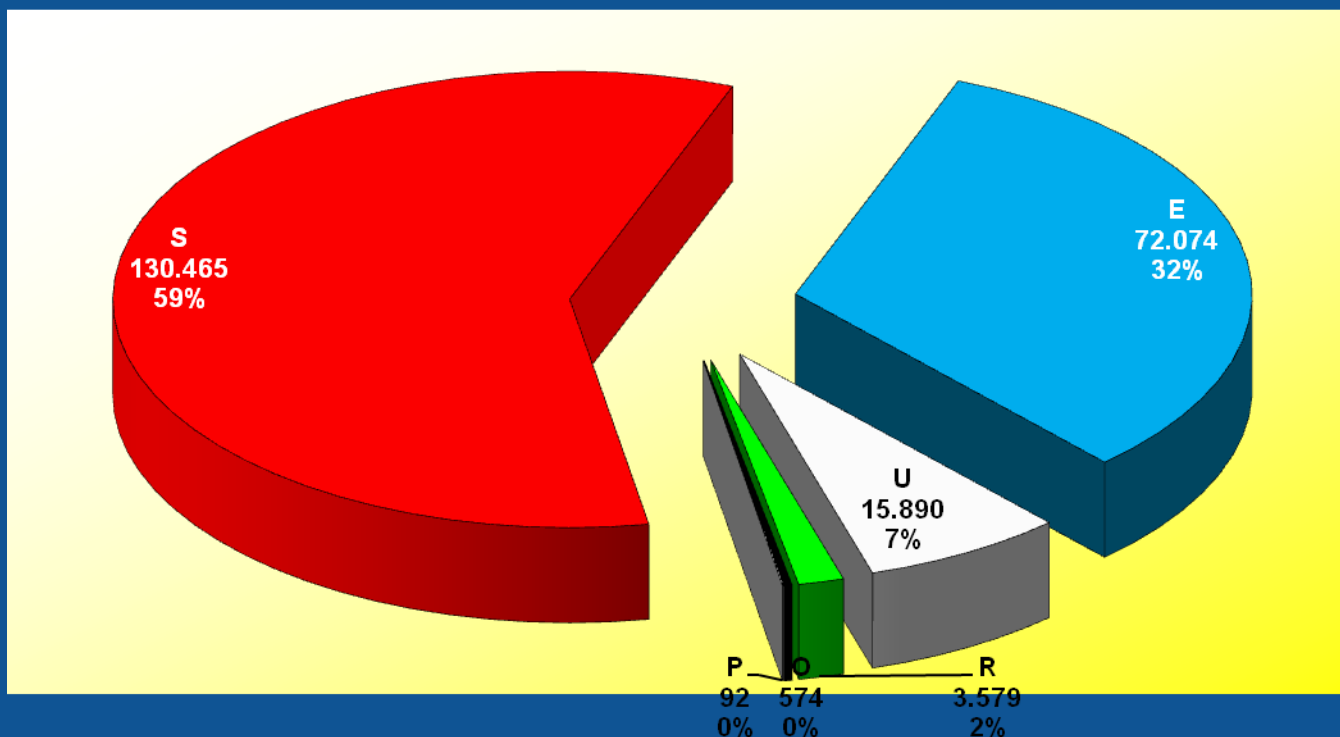
### Pattern of per capita consumption



**Pattern of per-capita  
consumption.**

# A possible approach for PIG

## Dispersion of Pig Carcasses on grades EU 28 in 2017 (in 1000 heads)



**Representativeness: 86 % of total slaughtering**



European  
Commission

# DATA AT MS LEVEL

## France

Année/Jahr/Year	(%)	%					
	Repr. % (1)	S	E	U	R	O	P
2010							
2011	93,2%	64,7	31,8	3,2	0,2	0,0	0,0
2012	93,2%	66,5	30,4	2,9	0,2	0,0	0,0
2013	93,3%	67,5	29,7	2,7	0,2	0,0	0,0
2014	92,5%	67,9	29,4	2,5	0,2	0,0	0,0
2015	91,2%	68,4	29,4	2,1	0,1	0,0	0,0
2016	90,4%	69,3	28,9	1,8	0,1	0,0	0,0
2017	91,8%	70,8	27,6	1,6	0,1	0,0	0,0
	94,9%	72,5	26,0	1,4	0,1	0,0	0,0

## Germany

Année/Jahr/Year	Repr. % (1)	S	E	U	R	O	P
2010	75,6%		73,7	26,3	0,0	0,0	0,0
2011	100,0%		81,3	18,3	0,4	0,0	0,0
2012	100,0%	9,0	71,3	18,4	1,2	0,1	0,0
2013	100,0%	40,2	49,0	12,9	1,2	0,1	0,0
2014	100,0%	39,6	48,2	11,1	1,0	0,1	0,0
2015	100,0%	41,6	47,4	10,2	0,8	0,0	0,0
2016	100,0%	42,1	47,2	9,9	0,8	0,0	0,0
2017	101,9%	50,2	41,5	7,6	0,6	0,0	0,0
	98,8%		93,4	6,2	0,4	0,0	0,0

## Denmark

Année/Jahr/Year	Repr. % (1)	E	U	R	O	P
2010	97,2%	97,2	2,7	0,1	0,0	0,0
2011	97,2%	97,7	2,3	0,1	0,0	0,0
2012	96,8%	97,8	2,1	0,1	0,0	0,0
2013	97,5%	96,8	3,0	0,2	0,0	0,0
2014	95,6%	96,4	3,4	0,2	0,0	0,0
2015	99,0%	96,8	3,0	0,2	0,0	0,0
2016	98,8%	96,9	2,9	0,2	0,0	0,0
2017	94,2%	97,1	2,7	0,2	0,0	0,0

## Italy

Année/Jahr/Year	Repr. % (1)	E	U	R	O	P
2010	0,0%					
2011	57,2%	4,6	36,6	48,8	9,4	0,6
2012	64,8%	4,7	37,7	48,0	9,1	0,5
2013	60,9%	4,2	37,1	49,0	9,2	0,4
2014	68,5%	8,2	42,8	41,0	7,7	0,3
2015	74,9%	19,0	55,2	22,6	3,0	0,2
2016	66,7%	15,7	54,7	25,7	3,6	0,2
2017	73,9%	17,70	51,50	26,08	4,50	0,22



European  
Commission

## EUROSTAT data:

- Average c.w.
- Monthly production at MS level

GEO/TIME	2012M01	2012M02	2012M03	2012M04	2012M05	2012M06	2012M07	2012M08	2012M09	2012M10
Belgium	91,46	89,07	97,20	88,86	92,28	90,55	89,36	94,84	84,21	101,83
Bulgaria	3,65	3,53	3,47	3,59	4,80	3,93	4,44	4,01	3,51	3,88
Czech Repu	18,99	20,20	20,83	19,96	20,23	19,67	19,00	20,89	18,28	21,93
Denmark	147,80	132,40	147,00	127,60	121,70	128,50	131,20	140,60	121,00	146,30
Germany (u	460,00	431,00	480,00	441,00	455,00	444,00	445,00	460,00	442,00	491,00
Estonia	2,68	2,62	2,81	3,27	3,35	3,01	2,98	3,02	2,81	3,33
Ireland	20,70	20,49	20,32	19,89	21,70	18,04	20,54	20,80	18,77	21,62
Greece	10,29	8,53	6,96	7,83	7,98	8,49	8,82	9,85	8,43	9,02
Spain	332,05	311,57	296,46	272,42	299,29	264,28	274,52	270,74	262,76	310,26
France	192,07	182,26	185,06	175,10	182,45	176,02	175,97	185,10	164,77	198,69
Croatia	7,20	6,50	7,10	6,00	6,40	6,40	6,80	7,00	6,50	7,60
Italy	150,52	142,85	132,03	145,83	129,61	126,17	127,74	123,73	126,48	147,29
Cyprus	4,56	4,07	3,92	4,41	4,53	4,15	4,55	4,56	4,02	4,33
Latvia	1,59	1,57	1,78	2,16	2,23	2,08	2,00	2,15	1,96	2,16
Lithuania	4,29	4,31	4,67	5,03	5,36	4,94	4,80	5,23	4,73	5,29
Luxembourg	0,83	0,80	0,92	0,84	0,92	0,90	0,89	0,82	0,79	0,95
Hungary	30,99	30,34	32,72	29,49	30,33	27,58	26,96	27,00	25,59	30,56
Malta	0,54	0,42	0,47	0,49	0,47	0,41	0,43	0,43	0,39	0,57
Netherlands	115,84	113,12	120,11	99,30	120,81	105,39	104,60	112,11	100,73	118,99
Austria	46,53	43,72	45,80	43,00	43,56	41,78	43,25	43,23	40,57	48,02
Poland	135,10	131,60	162,50	146,10	161,80	147,20	135,30	127,90	120,30	147,10
Portugal	30,76	30,84	30,74	29,91	31,20	27,96	30,64	31,31	27,01	32,38
Romania	16,85	20,20	22,09	26,24	23,19	20,59	22,14	23,90	22,62	26,76
Slovenia	1,91	1,74	1,82	1,83	1,95	1,69	1,76	1,55	1,44	1,77
Slovakia	4,03	3,98	4,46	4,10	4,83	4,47	4,62	4,63	4,69	5,09
Finland	15,99	16,16	17,32	15,52	16,28	14,89	16,37	16,48	14,27	17,05
Sweden	20,82	20,71	21,17	18,90	20,48	17,80	20,04	19,85	17,38	20,23
United King	78,07	63,77	63,86	76,34	61,69	60,40	77,80	63,87	64,66	83,30

For each MS

(%)	%					
Repr. % (1)	S	E	U	R	O	P
93,2%	64,7	31,8	3,2	0,2	0,0	0,0
93,2%	66,5	30,4	2,9	0,2	0,0	0,0
93,3%	67,5	29,7	2,7	0,2	0,0	0,0
92,5%	67,9	29,4	2,5	0,2	0,0	0,0
91,2%	68,4	29,4	2,1	0,1	0,0	0,0
90,4%	69,3	28,9	1,8	0,1	0,0	0,0
91,8%	70,8	27,6	1,6	0,1	0,0	0,0
94,9%	72,5	26,0	1,4	0,1	0,0	0,0

Classes	Lean meat as percentage of carcass weight
S	60 or more
E	55 or more but less than 60
U	50 or more but less than 55
R	45 or more but less than 50
O	40 or more but less than 45
P	less than 40

### Average values

62,5

57,5

52,5

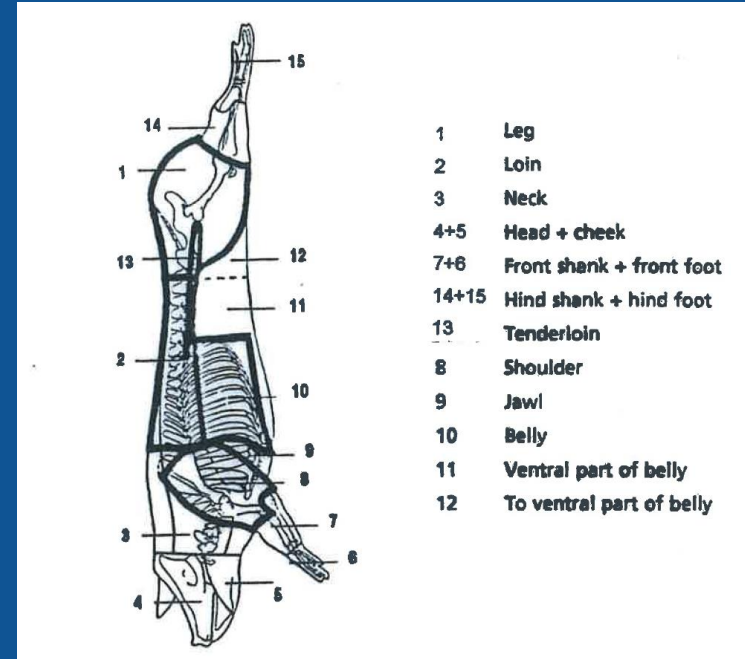
47,5

42,5

38,5

- Estimation of lean meat
- Estimation of fat (subcutaneous + skin and intermuscular)
- Estimation of bones

In the framework of the expert groups on pig carcass classification, data could be obtained by MS experts in charge of designing trial for devices approval to obtain the percentage on the carcass of the 4 following cuts according to different ranges of c.w.:



1. Loin
2. Shoulder
3. Ham
4. Belly





**Trade data will be analysed using the conversion coefficients developed by Russo et al., that take into account weight losses, salt added and meat yield for the different CN code, in order to estimate the quantity of meat originally present in the products;**

**Finally, to estimate real consumption, the 12% reduction will be applied, in line with bovine meat.**

# CONCLUSIONS

**The method could allow to estimate the meat produced in the EU and available for consumption, the production of the main cuts as well as the total and per capita consumption at EU level.**

**Fat and offal play an important role on the market. Fat production can be estimated by difference with c.w. and offals by difference from live weight.**

# OPEN POINTS

## **Bovine**

- Cuts classification;
- Veal export;

## **Pig**

- Percentage of intramuscular fat to be included in the consumption;
- Offal destinations (human/pet/industry)



**THANKS YOU FOR YOUR ATTENTION**