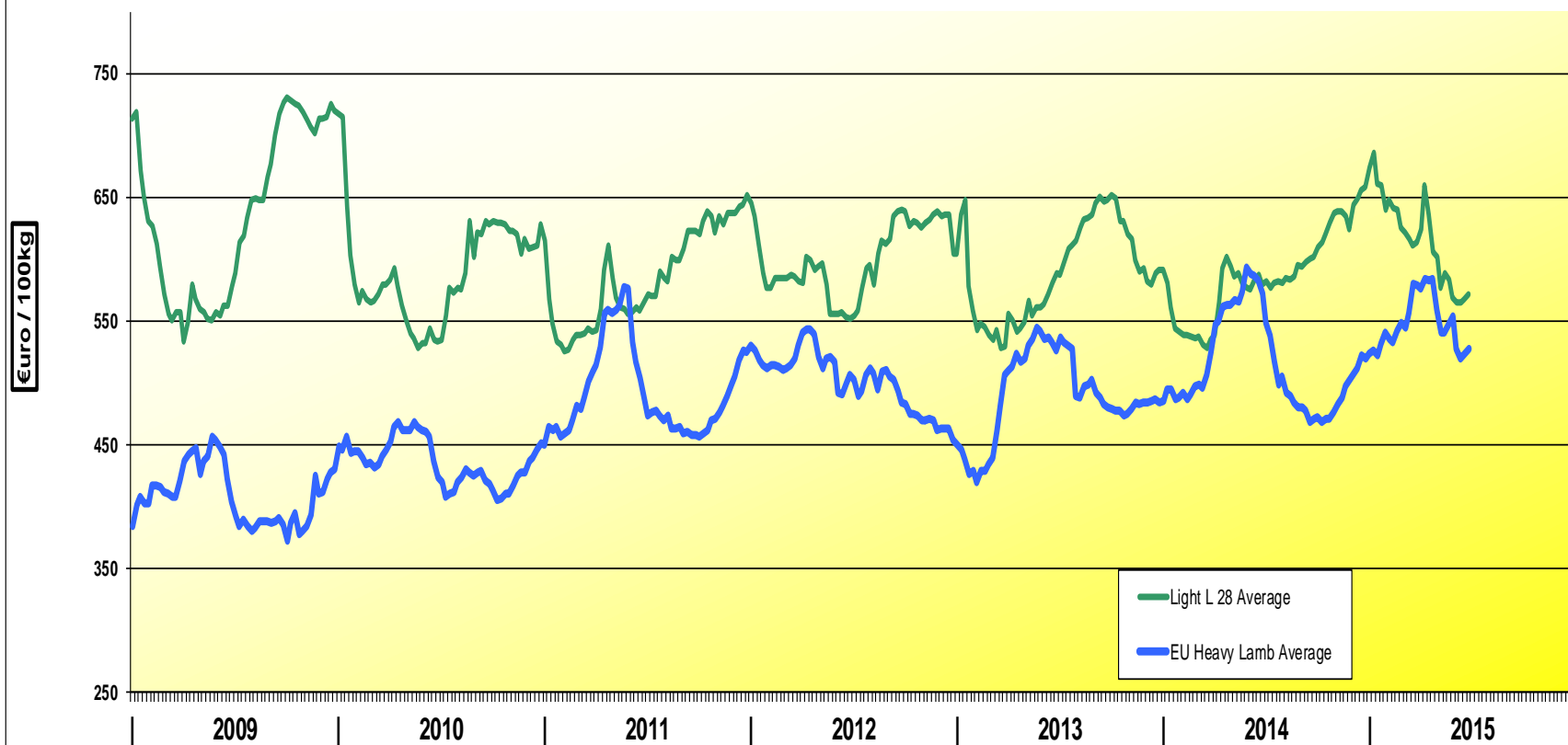


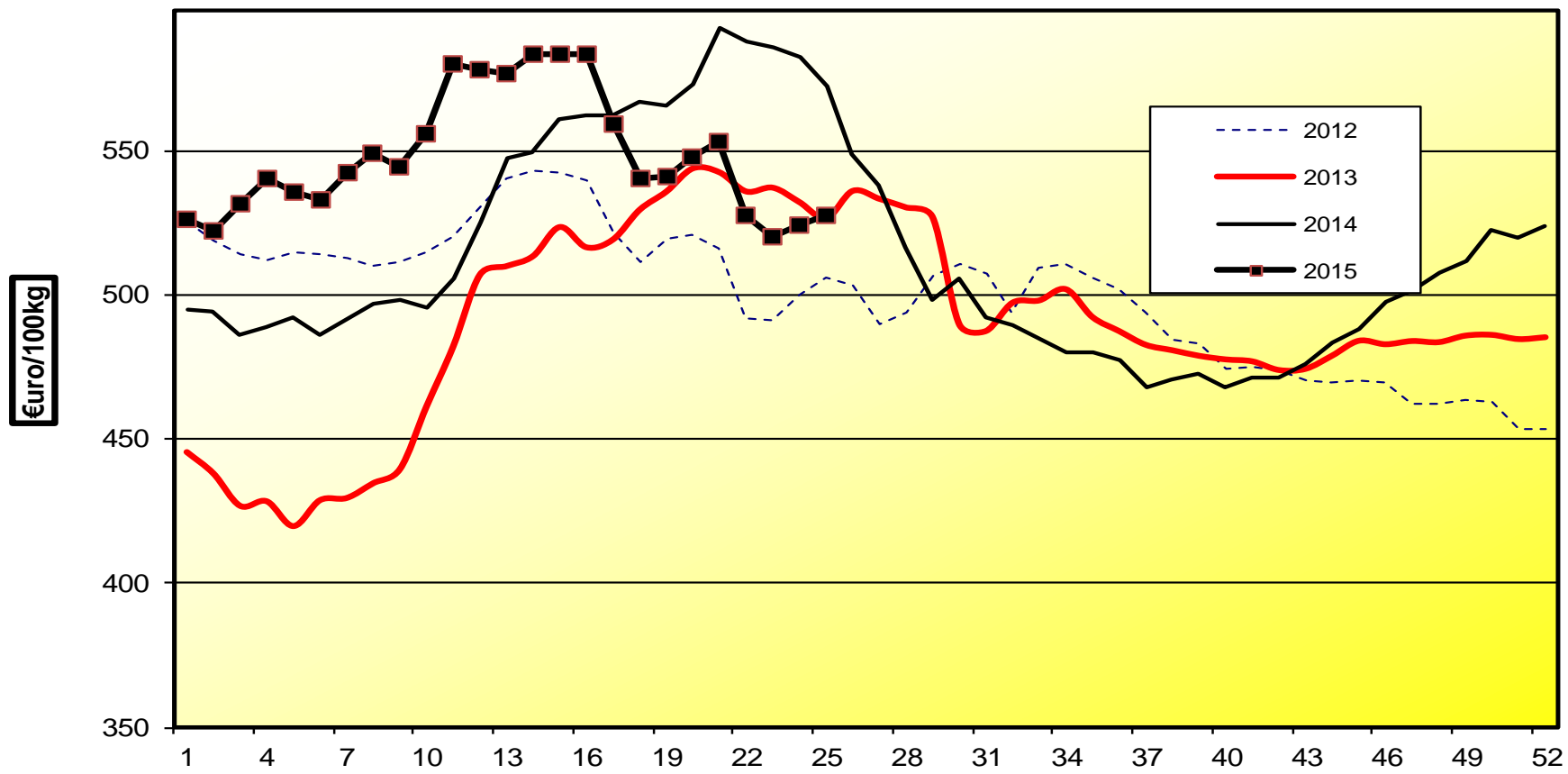


***Civil Dialog Group
Market Situation for Sheep & Goats
30 June 2015***

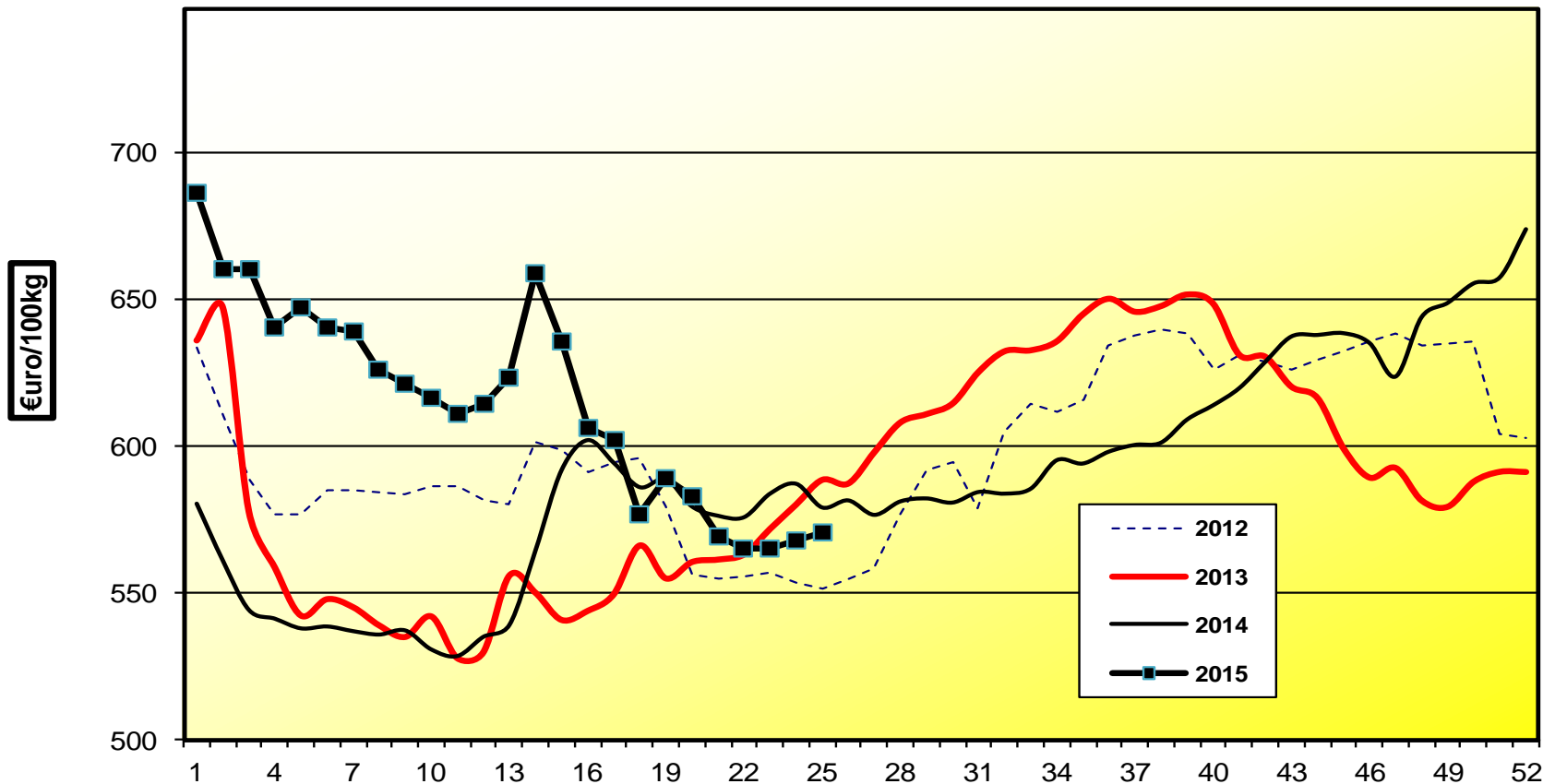
Development of the EU average market price for Heavy and Light Lamb carcass



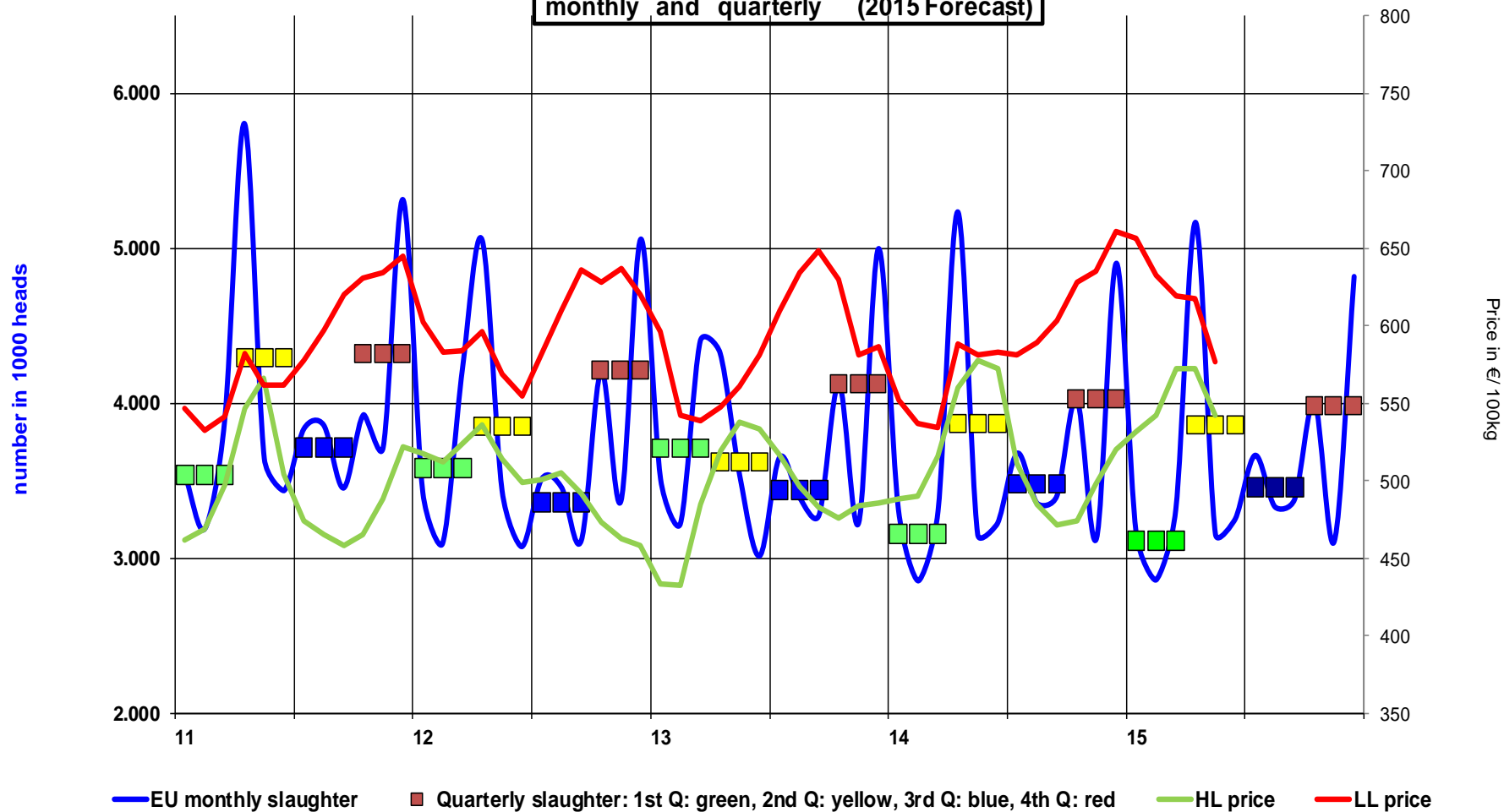
Heavy Lamb prices in the EU 2012 - 2015



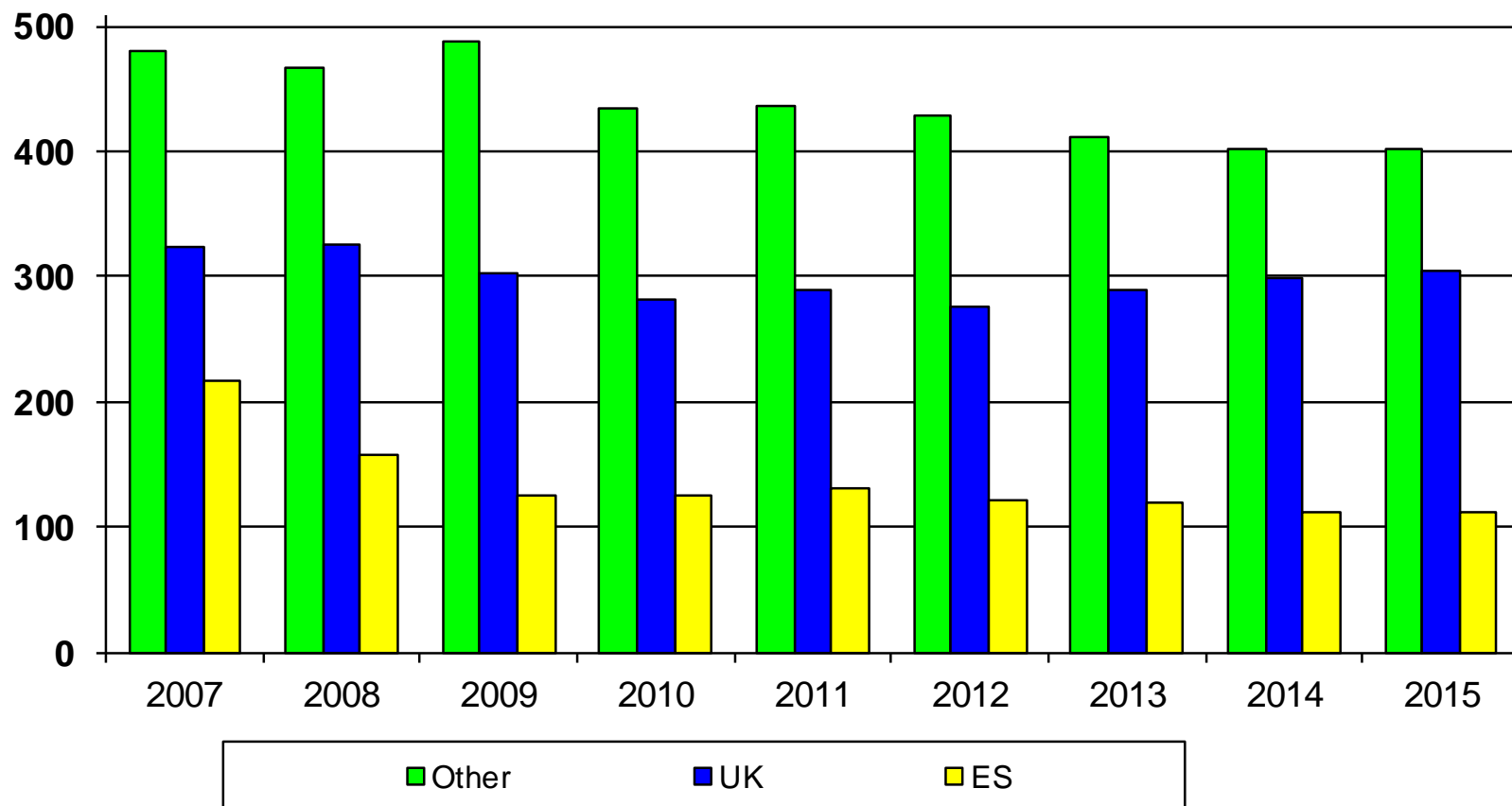
Light Lamb prices in the EU 2012 - 2015



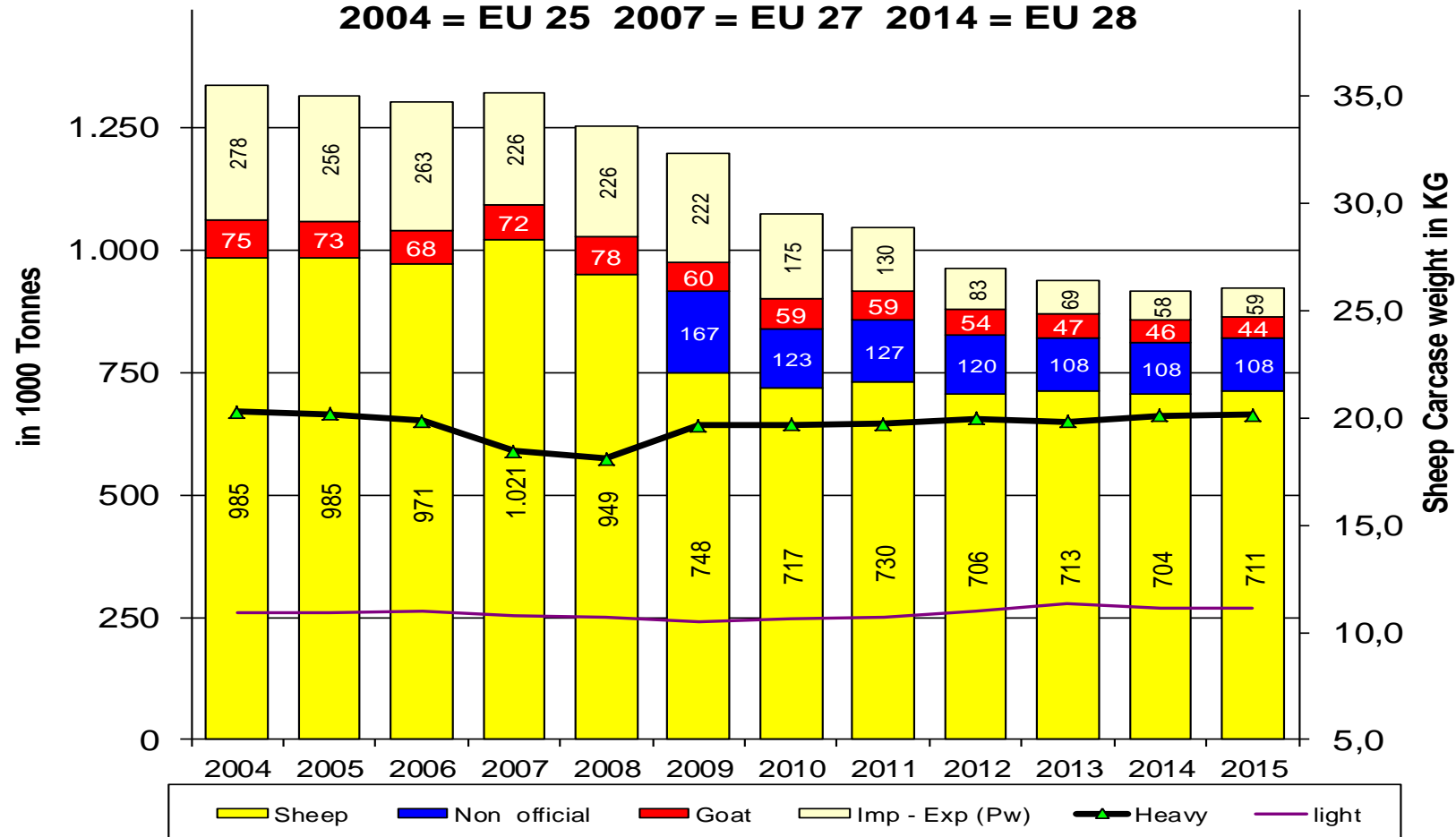
Sheep slaughter in the EU monthly and quarterly (2015 Forecast)



Lamb production in the UK and Spain compared to "Other" in 1000 Tonns (incl. (incl. Slaughter other than in slaughterhouses))

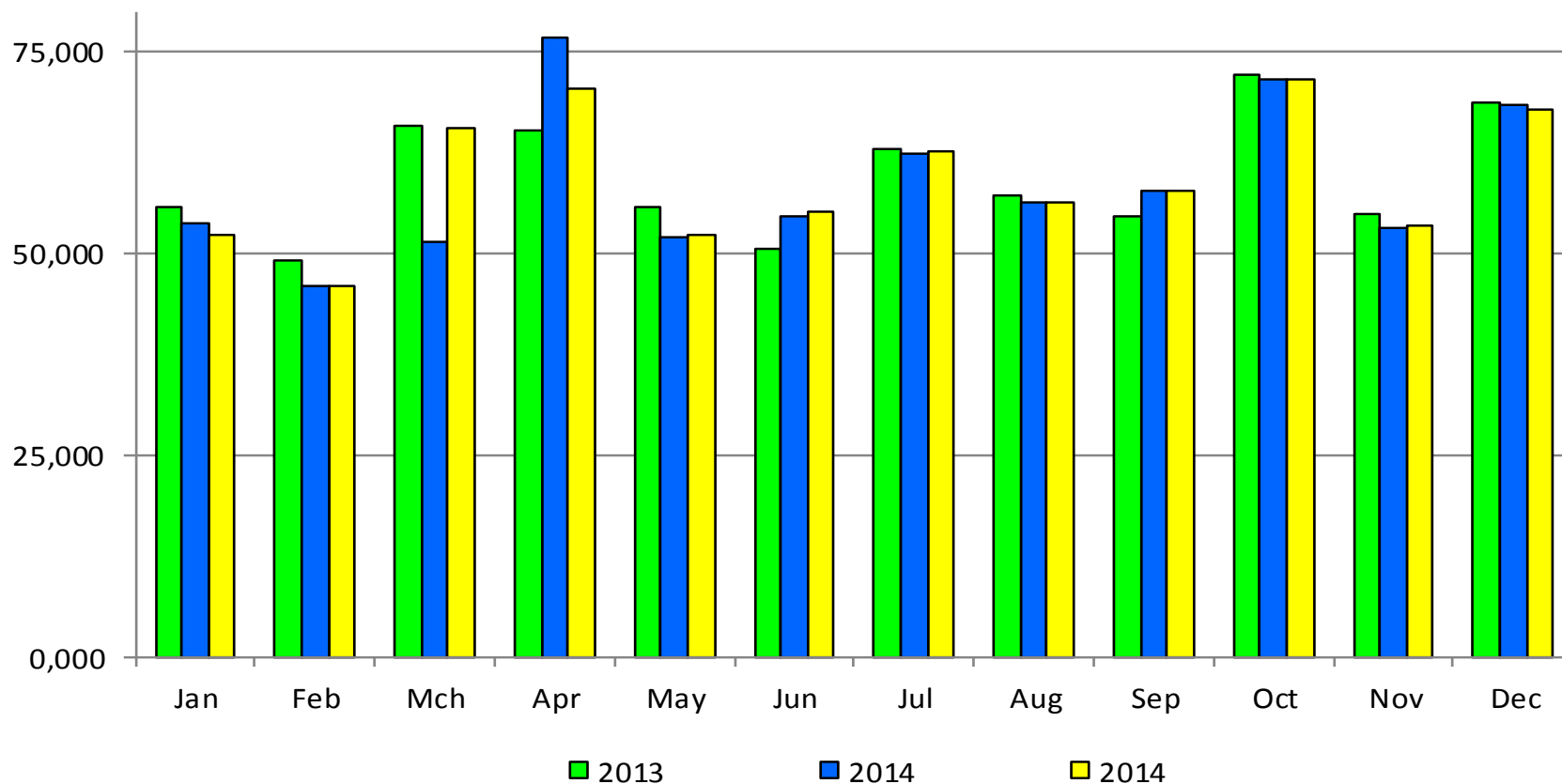


Sheep and Goat meat supply in the EU 2004 = EU 25 2007 = EU 27 2014 = EU 28



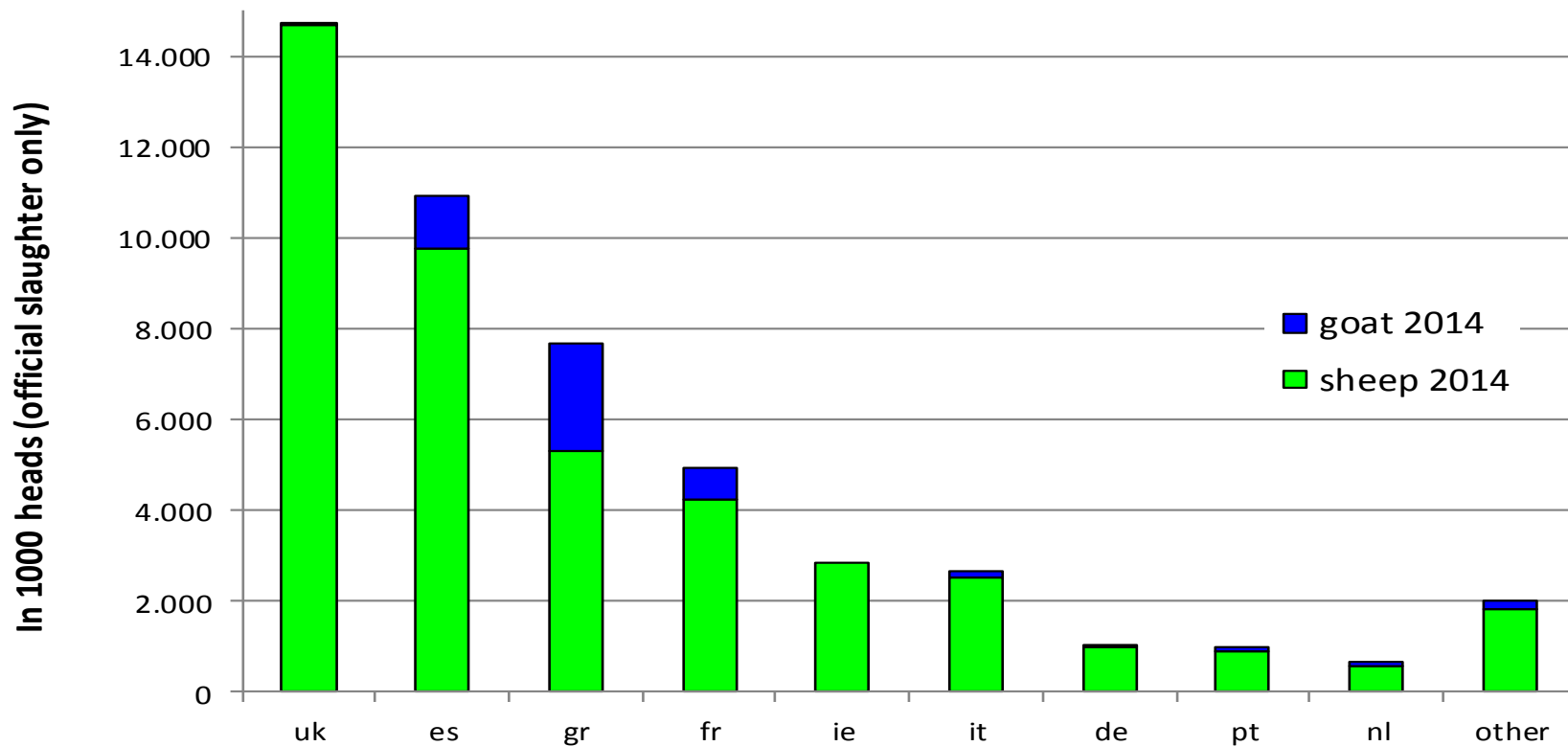
Monthly sheep slaughter in the EU 28

Slaughter in Ton



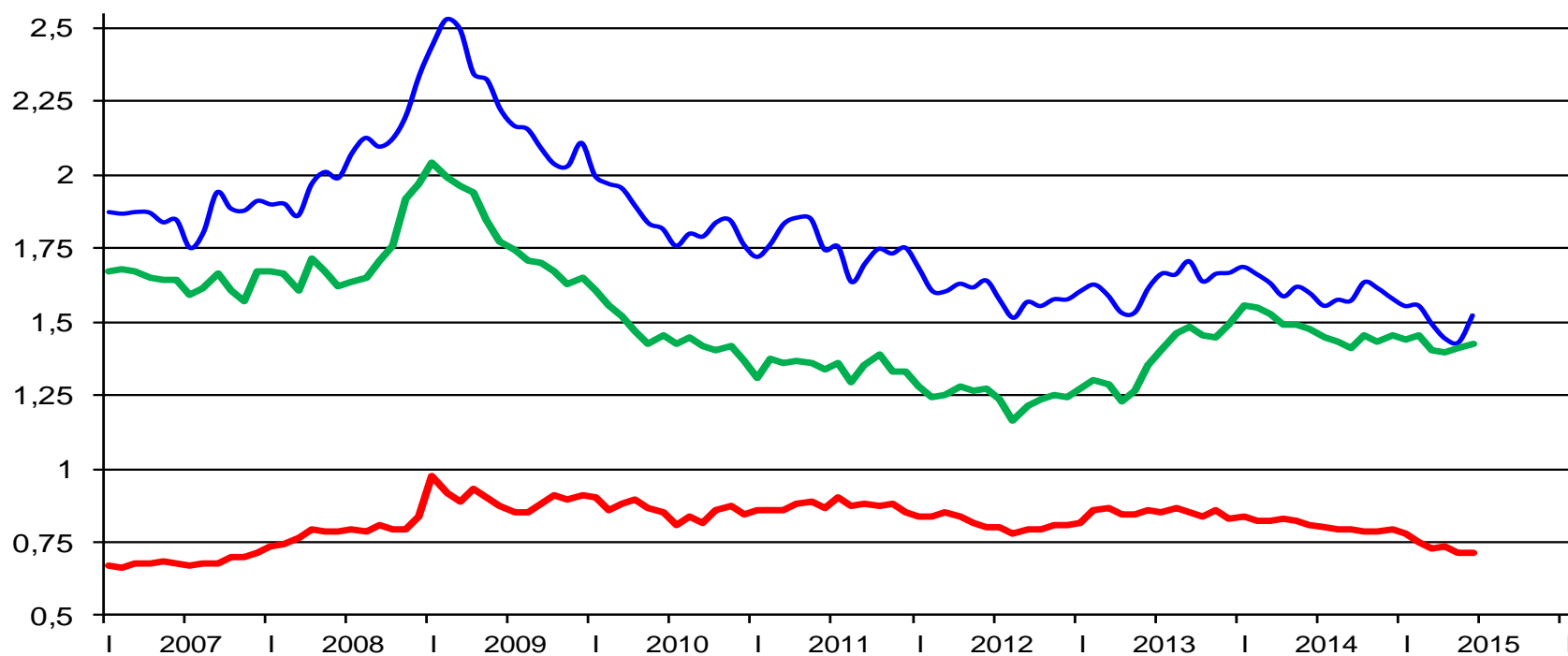
Sheep and Goat meat production 2014

-2,6% cmpaired to 2013



Exchange rate UK£ - NZ\$ & AUS\$ - Euro

quotation: 1st day of the month



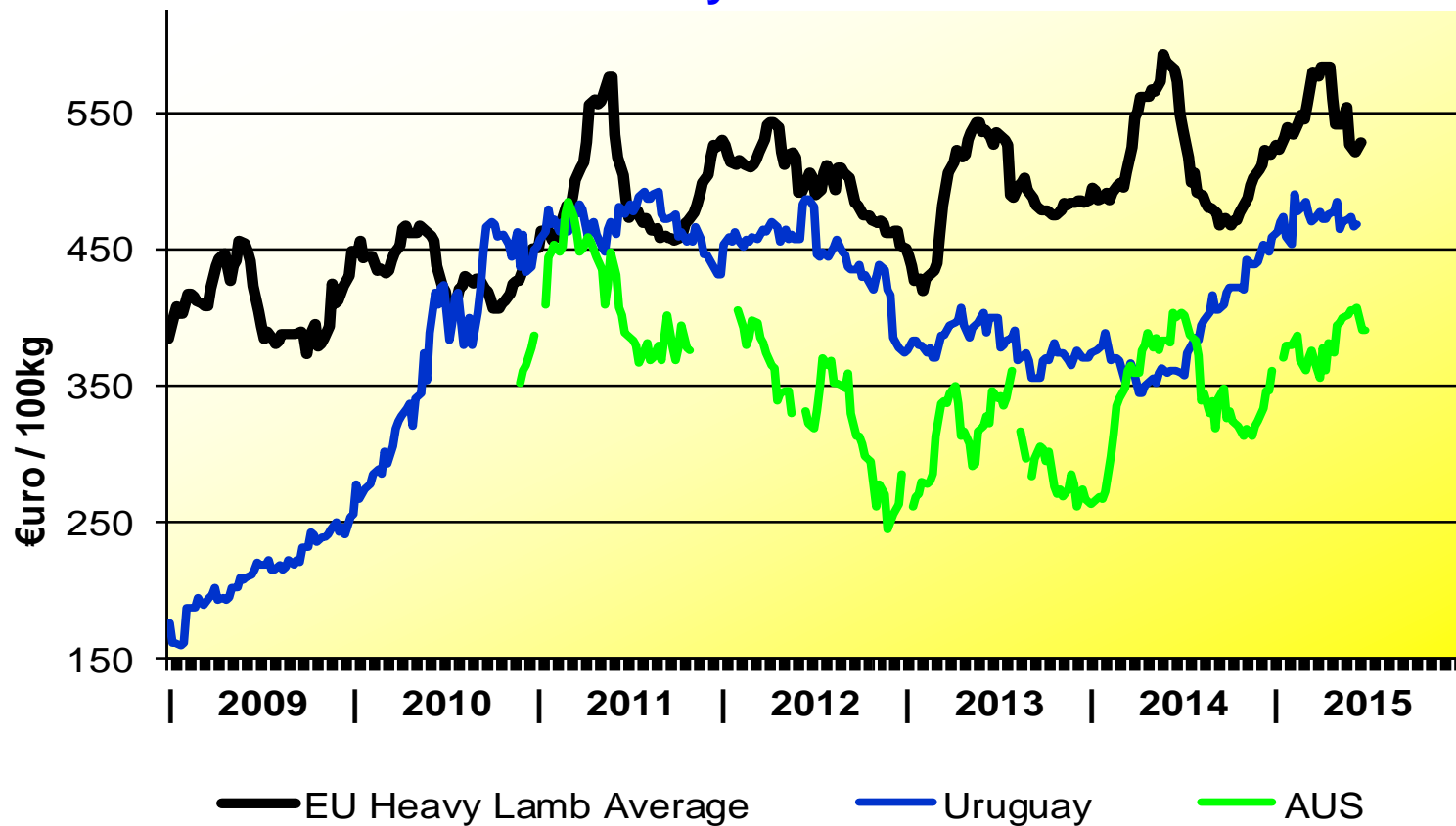
<http://ec.europa.eu/budget/inforeuro/index.cfm>

— NZ\$

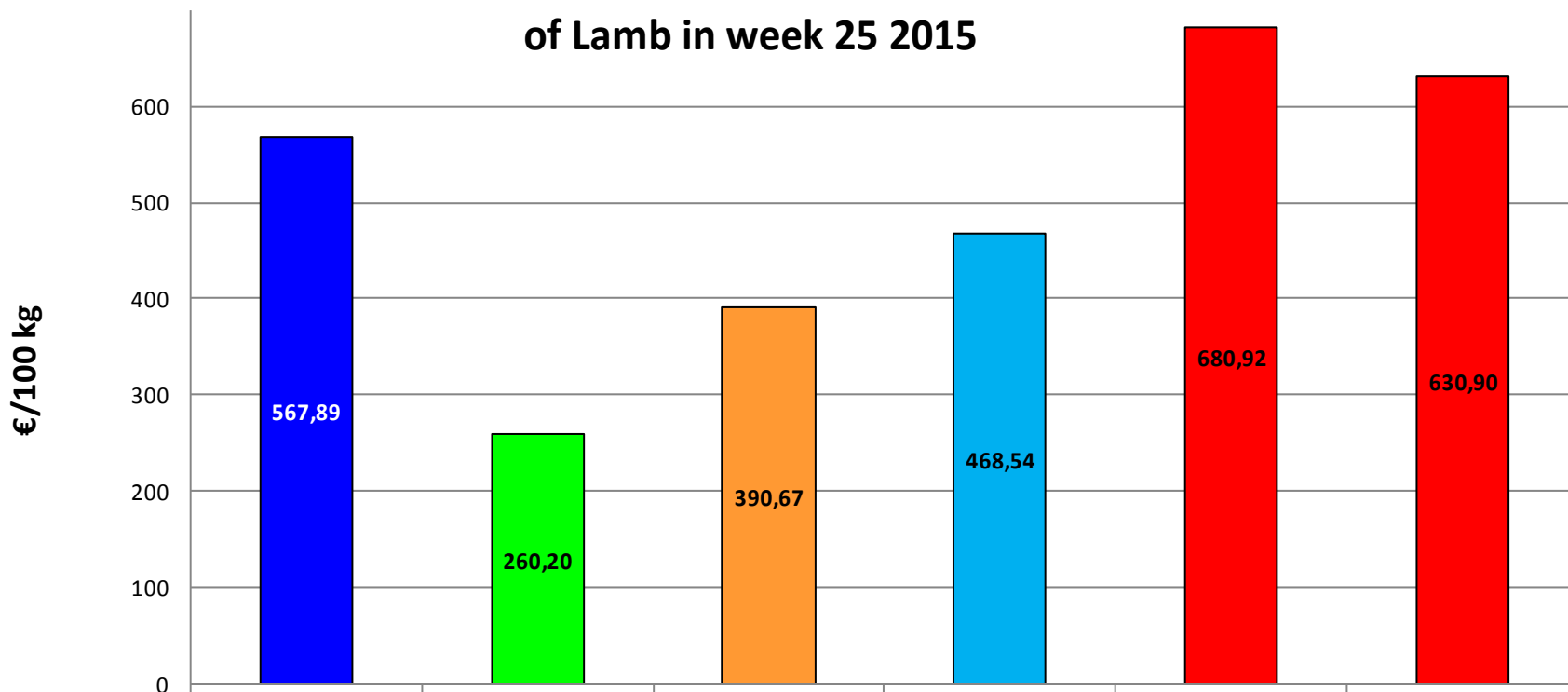
— AUS\$

— UK£

Community average and international market prices for Heavy Lamb carcasses

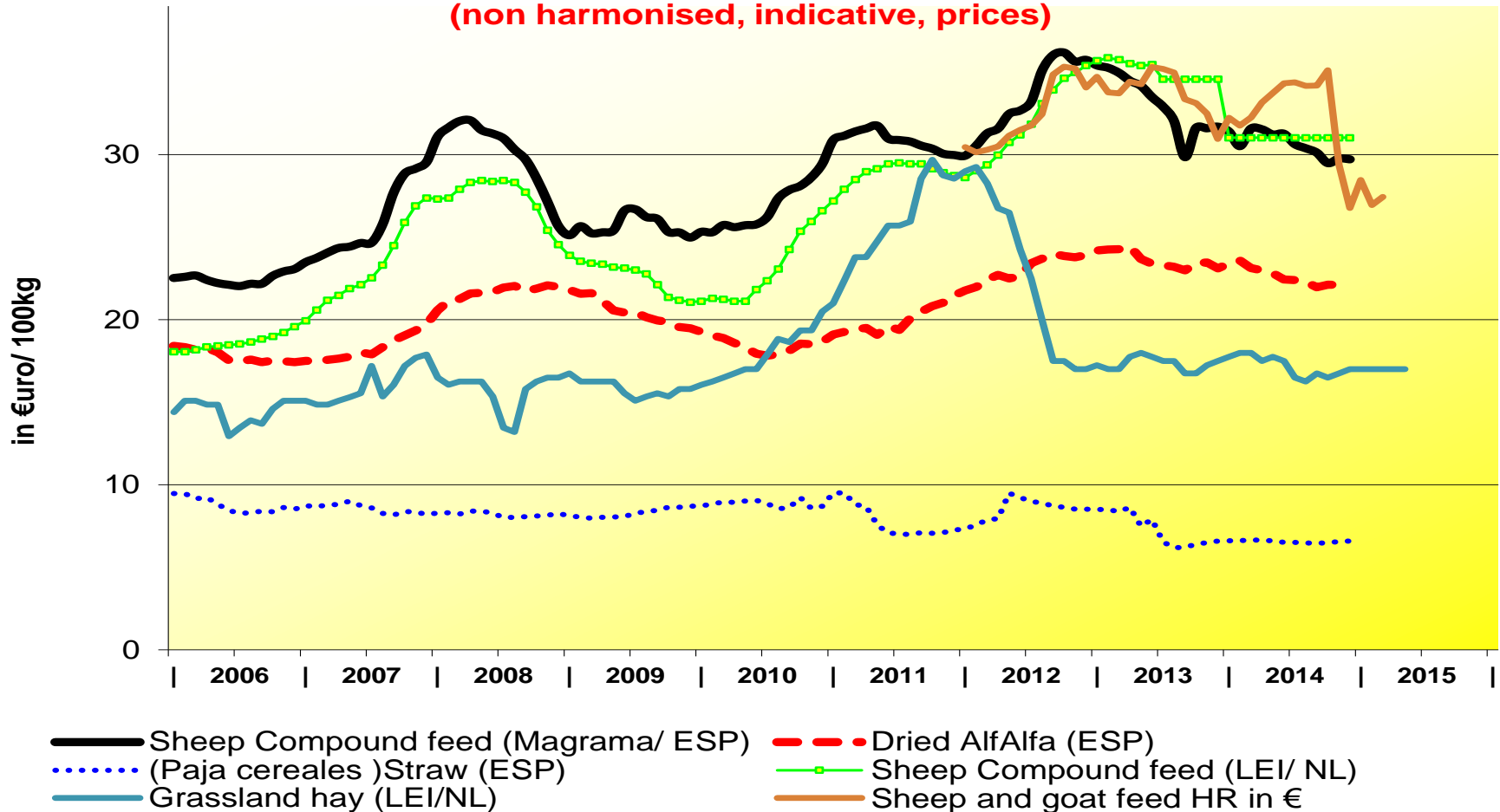


WORLD MARKET PRICES of Lamb in week 25 2015



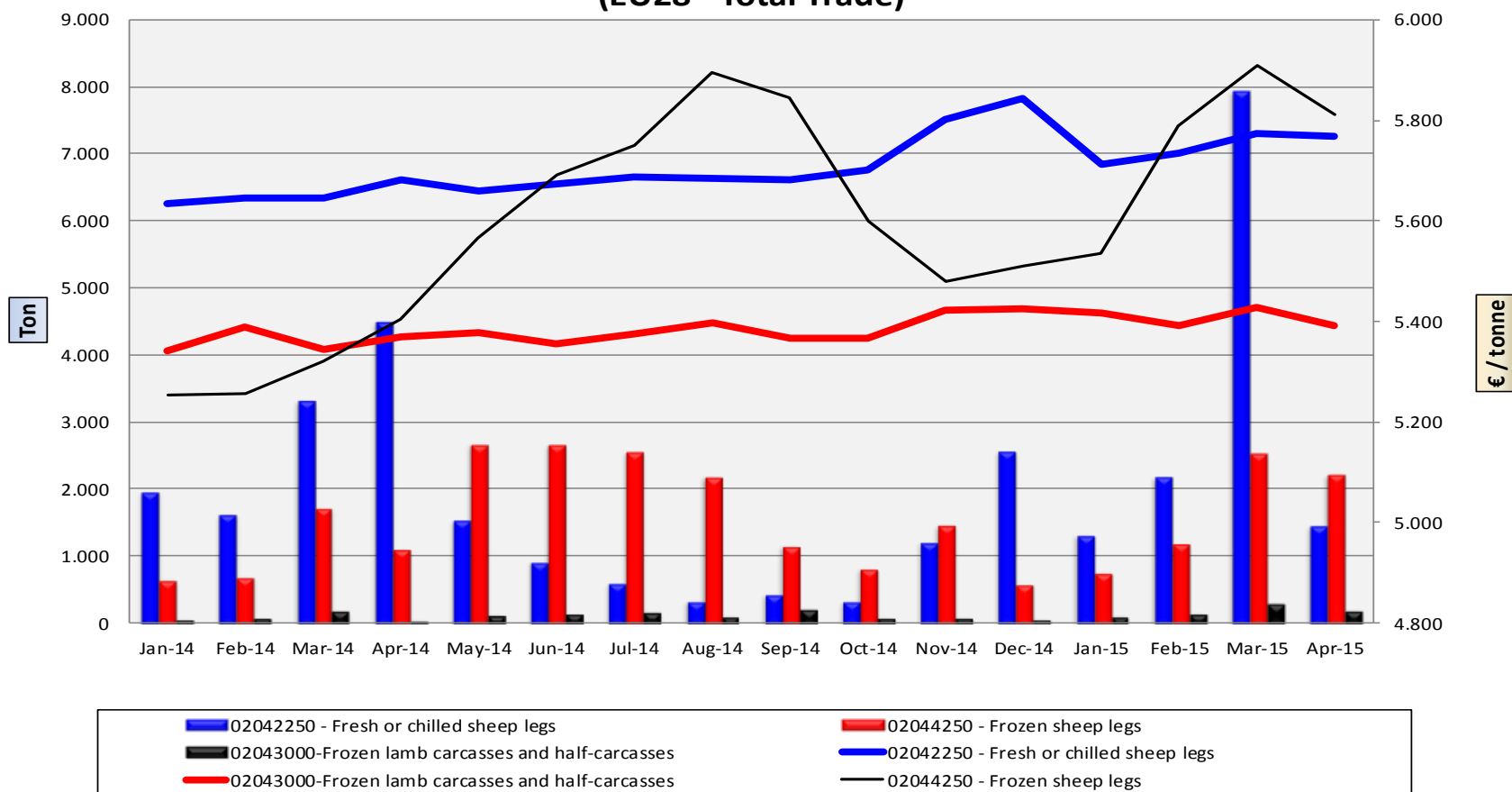
	Heavy Lamb EU	Y-Lamb New Zealand	Trade lamb Australia	Carcasa Cordero Uruguay	55 - 65lb USA	65 - 75lb USA
Price in €/100 kg	567,89	260,20	390,67	468,54	680,92	630,90
Compared to EU		- 54%	- 31%	- 17%	+ 20%	+ 11%

Feed Prices for Sheep and fattening (non harmonised, indicative, prices)



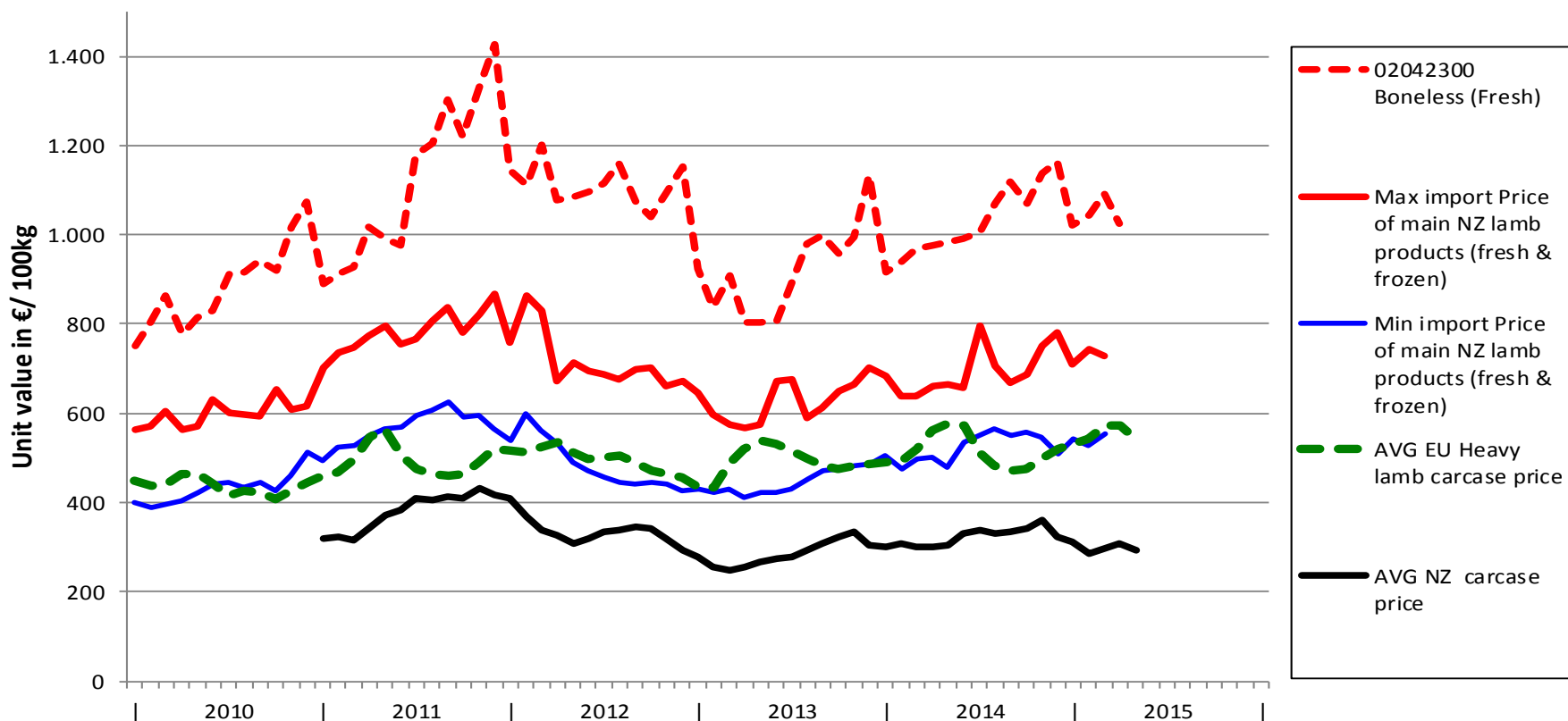
SHEEP & GOAT PRODUCTS IMPORTED FROM NEW ZEALAND

Fresh or chilled sheep legs, Frozen sheep legs
& Frozen lamb carcasses and half-carcasses
(EU28 - Total Trade)



Import price of certain New Zealand Lamb products into the EU compared to the NZ and EU heavy carcass price

the graph concerns 84% of the total fresh and frozen lamb imports from NZ (by weight)
and 78% of the total Sheep & Goat imports from NZ





EU import of sheep & goat meat and live animals

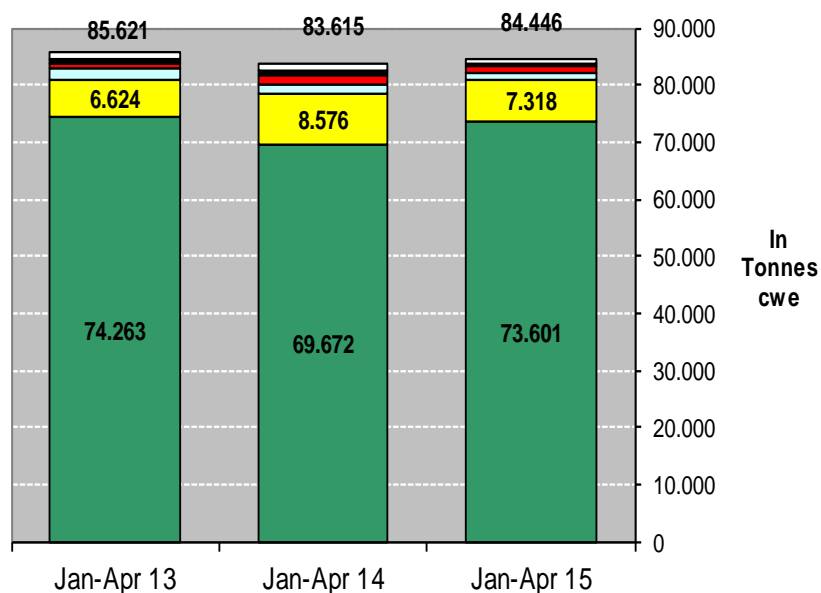
Trade figures (Comext)

	2011		2012		2013		2014		Jan-Apr 15		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Apr 14
New Zealand	192.987	82,2%	170.112	84,7%	178.732	84,4%	165.175	82,5%	73.601	87,2%	+ 5,6%
Australia	21.097	9,0%	17.631	8,8%	19.645	9,3%	21.355	10,7%	7.318	8,7%	- 14,7%
For.JRep.Mac	3.054	1,3%	2.527	1,3%	2.666	1,3%	2.484	1,2%	1.349	1,6%	- 27,6%
Uruguay	4.974	2,1%	3.504	1,7%	3.264	1,5%	3.339	1,7%	936	1,1%	- 32,5%
Chile	5.317	2,3%	3.226	1,6%	3.983	1,9%	3.618	1,8%	486	0,6%	- 41,0%
Falkland Is.	608	0,3%	616	0,3%	740	0,3%	766	0,4%	273	0,3%	- 26,9%
Argentina									268	0,3%	- 58,0%
Iceland	2.073	0,9%	1.102	0,5%	1.441	0,7%	1.798	0,9%	191	0,2%	- 28,1%
Other Origins	6.657	2,8%	3.324	1,7%	2.719	1,3%	3.493	1,7%	215	0,3%	- 41,6%
EXTRA EU	234.695		200.940		211.750		200.231		84.446		
% change			- 14%		+ 5%		- 5%		+ 1,0%		

EU imports of sheep & goatmeat and live animals

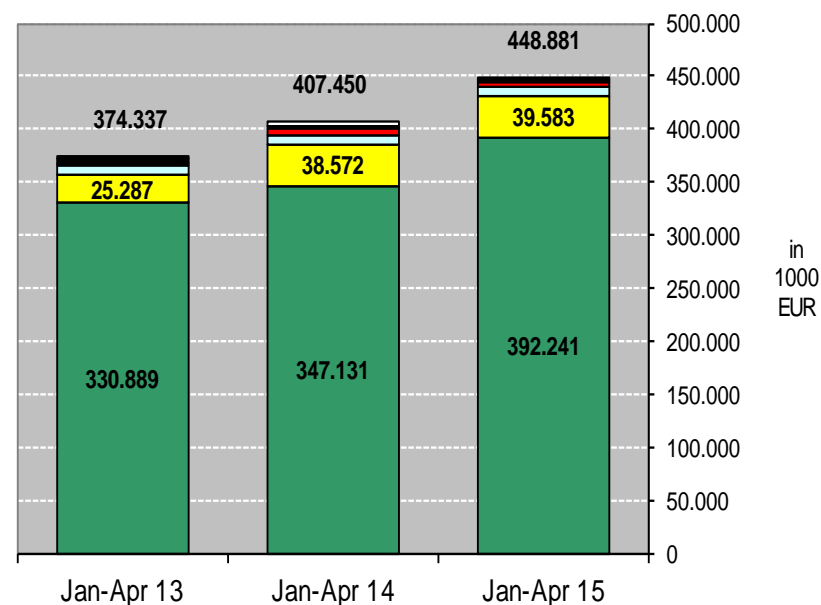
Trade figures (COMEXT)

EU IMPORTS of Sheep & Goat (Tonnes cwe %)



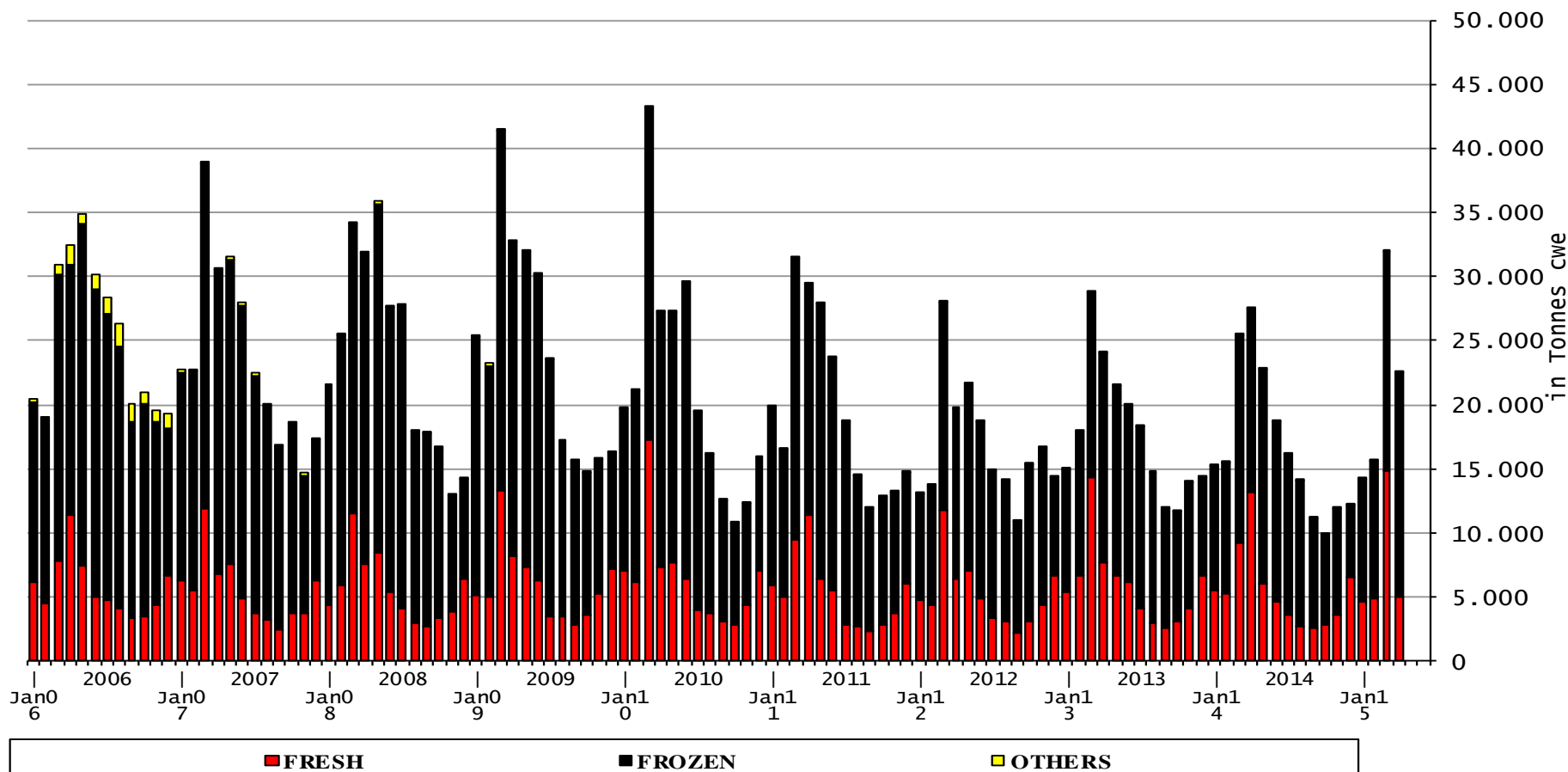
■ New Zealand ■ Australia ■ For.JRep.Mac ■ Uruguay ■ Chile ■ Other origins

EU IMPORTS of Sheep & Goat (1000 EUR %)



■ New Zealand ■ Australia ■ For.JRep.Mac ■ Uruguay ■ Chile ■ Other origins

EU-28 Imports of Sheep and Goat products



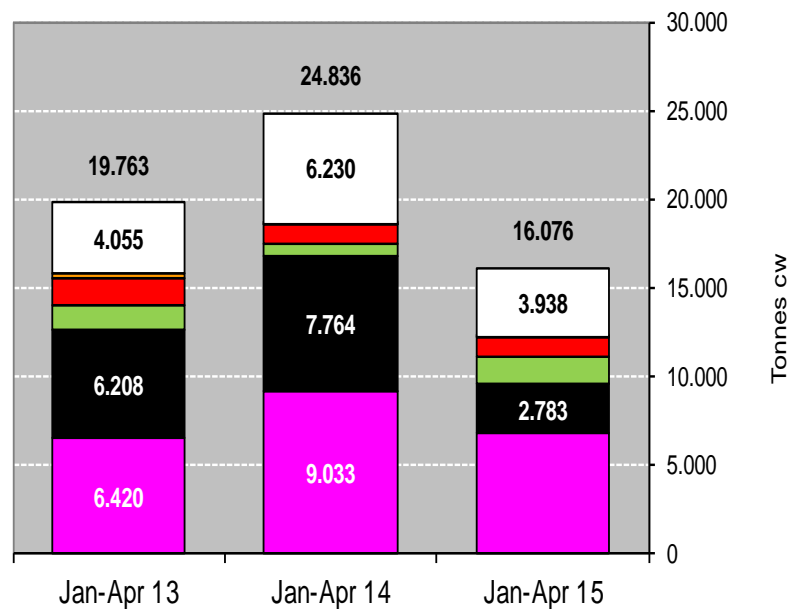
EU exports of sheep & goat meat and live animals: Trade figures (COMEXT – tonnes cwe)

	2011		2012		2013		2014		Jan-Apr 15		Compared to Jan-Apr 14
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Libya	3.469	5,5%	28.694	35,0%	49.631	46,3%	52.798	47,7%	6.718	41,8%	- 25,6%
Hong Kong	3.940	6,2%	12.452	15,2%	20.460	19,1%	17.332	15,7%	2.783	17,3%	- 64,2%
Lebanon	5.711	9,0%	4.909	6,0%	5.067	4,7%	6.373	5,8%	1.605	10,0%	+ 139,0%
Switzerland	1.977	3,1%	2.047	2,5%	2.255	2,1%	1.996	1,8%	1.000	6,2%	- 7,8%
Ghana	1.811	2,9%	2.256	2,8%	2.981	2,8%	1.669	1,5%	612	3,8%	+ 1,1%
Algeria	0	0,0%	275	0,3%	1.337	1,2%	1.946	1,8%	488	3,0%	- 0,8%
Jordan	9.938	15,7%	12.365	15,1%	14.420	13,4%	16.142	14,6%	396	2,5%	- 75,0%
Norway	652	1,0%	1.884	2,3%	2.403	2,2%	1.642	1,5%	386	2,4%	- 13,2%
Guinea	15	0,0%	12	0,0%	371	0,3%	773	0,7%	332	2,1%	+ 82,6%
Ivory Coast	357	0,6%	549	0,7%	1.096	1,0%	1.345	1,2%	224	1,4%	- 35,2%
U.A.Emirates	14	0,0%	334	0,4%	284	0,3%	1.292	1,2%	162	1,0%	- 18,7%
China	63	0,1%	96	0,1%	479	0,4%	378	0,3%	148	0,9%	+ 114,8%
Centr.Africa	0	0,0%	0	0,0%	0	0,0%	125	0,1%	119	0,7%	+++
Russia	43	0,1%	153	0,2%	12	0,0%	10	0,0%	2	0,0%	- 45,6%
Other Destinations	35.141	55,7%	15.930	19,4%	6.475	6,0%	6.897	6,2%	1.099	6,8%	- 36,8%
EXTRA EU	63.128		81.953		107.270		110.717		16.076		
% change			+ 30%		+ 31%		+ 3%		- 35,3%		

EU exports of sheep & goatmeat and live animals

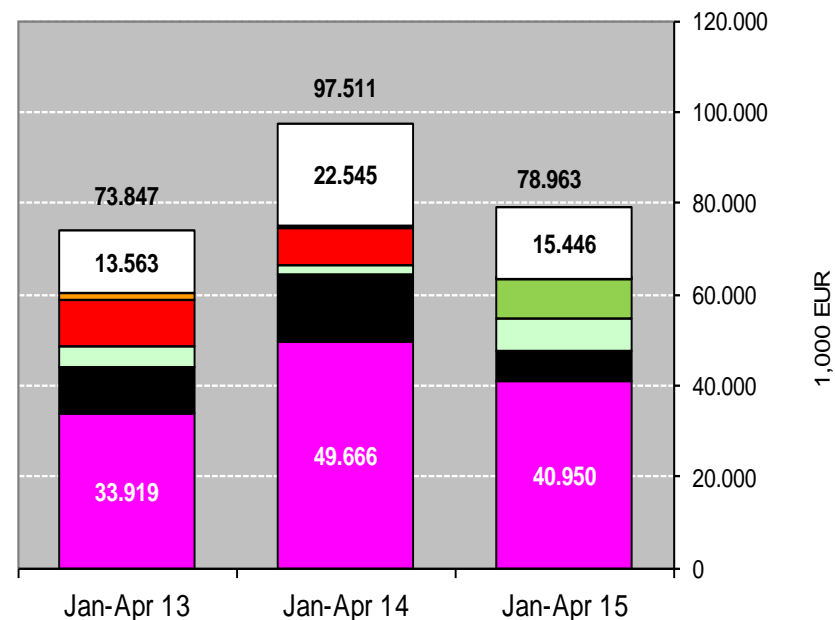
Trade figures (COMEXT)

EU EXPORTS of Sheep & Goat (Tonnes cwe)



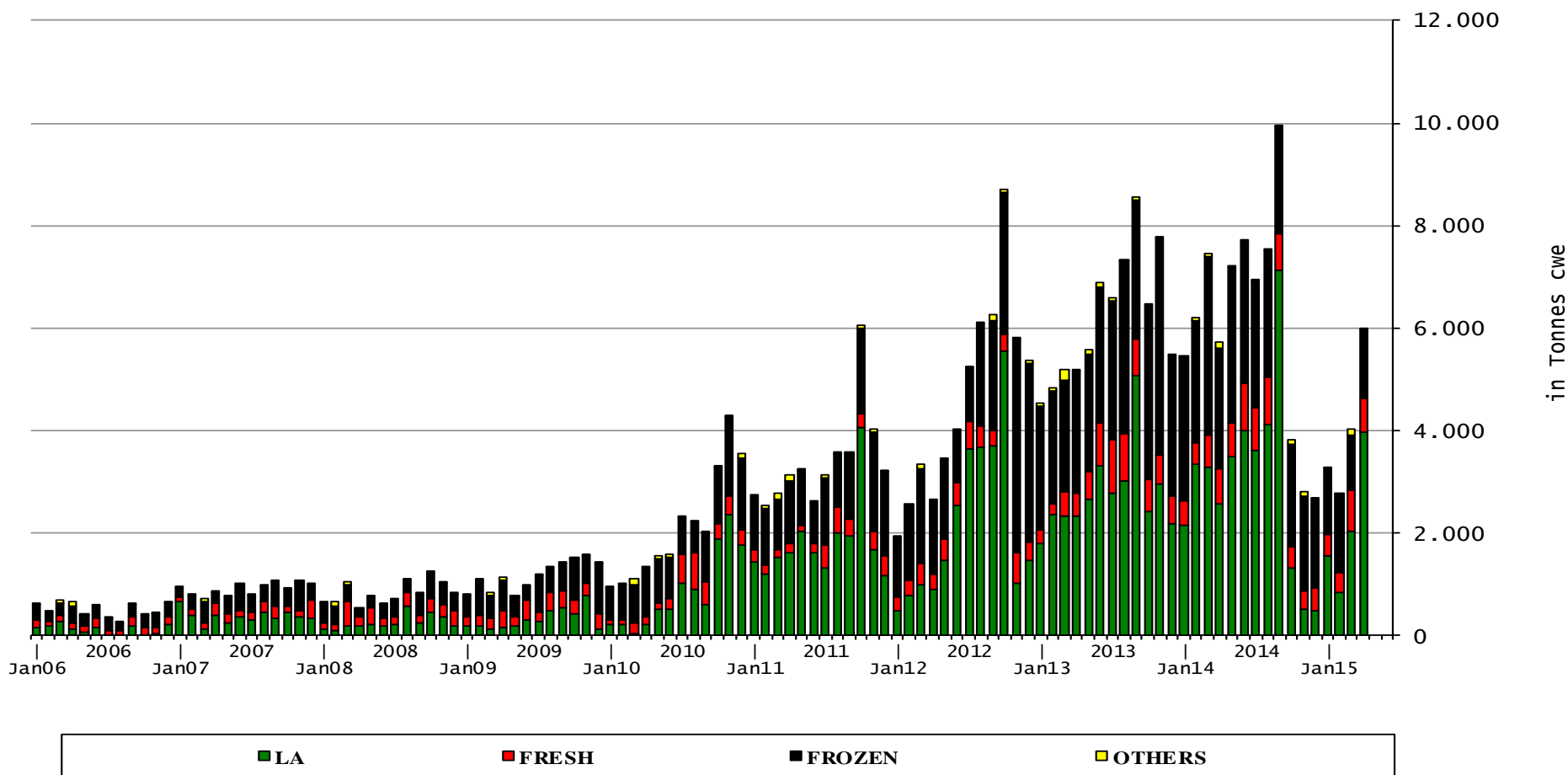
■ Libya ■ Hong Kong ■ Lebanon ■ Switzerland ■ Turkey □ Other destinations

EU EXPORTS of Sheep & Goat (1000 EUR)



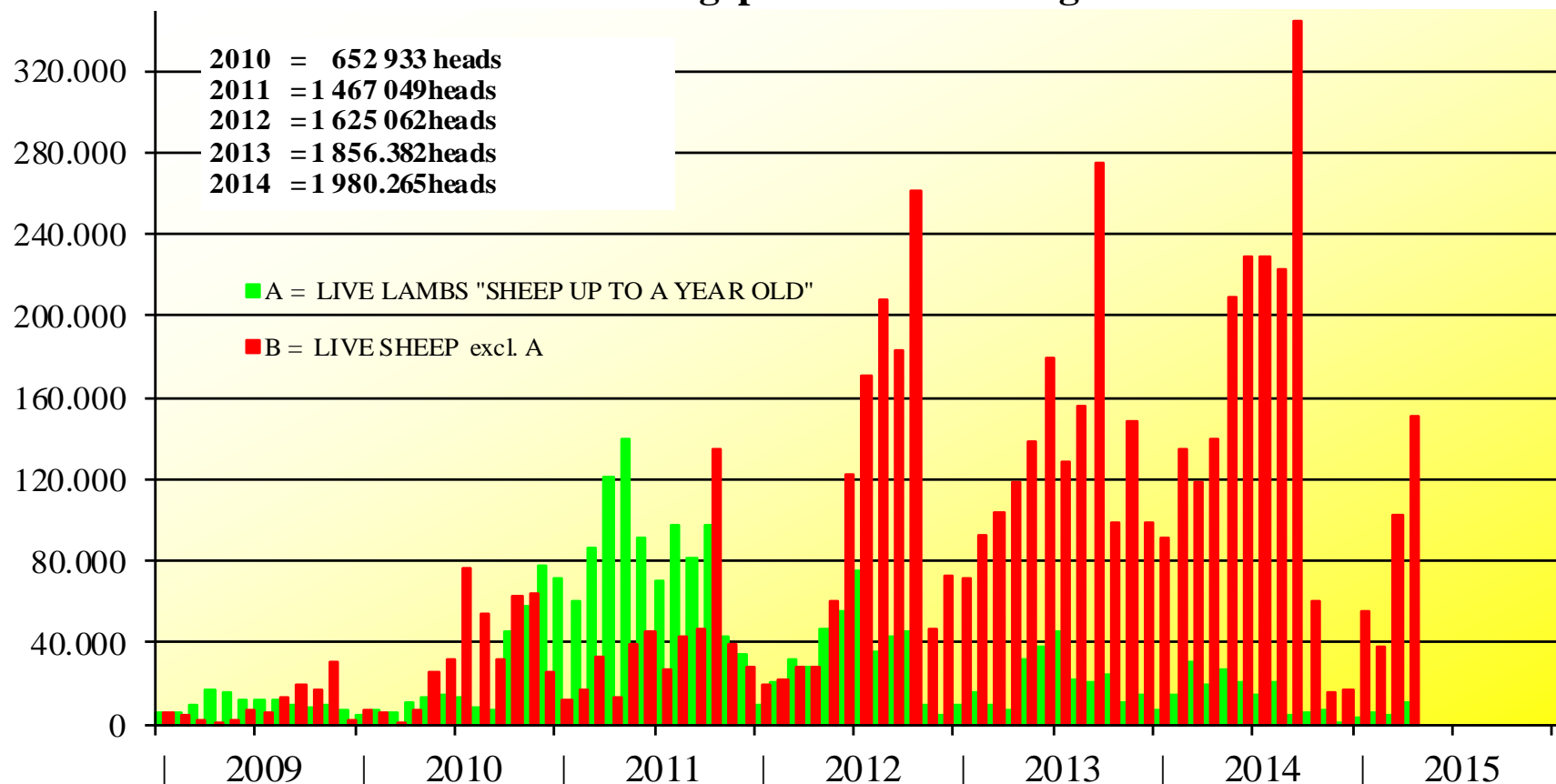
■ Libya ■ Hong Kong ■ Lebanon ■ Switzerland ■ Turkey □ Other destinations

EU-28 Exports of Sheep and Goat products



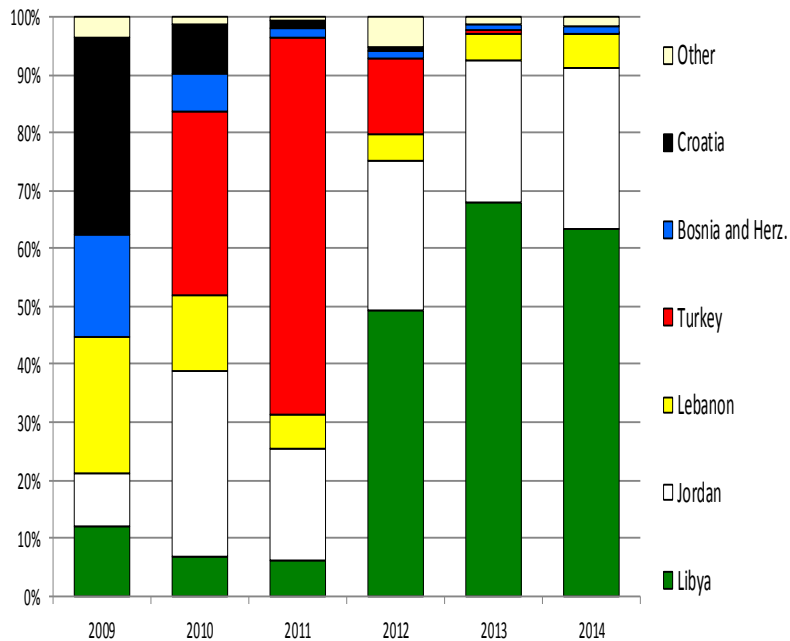
Export of live sheep, in heads

excluding pure-bred breeding

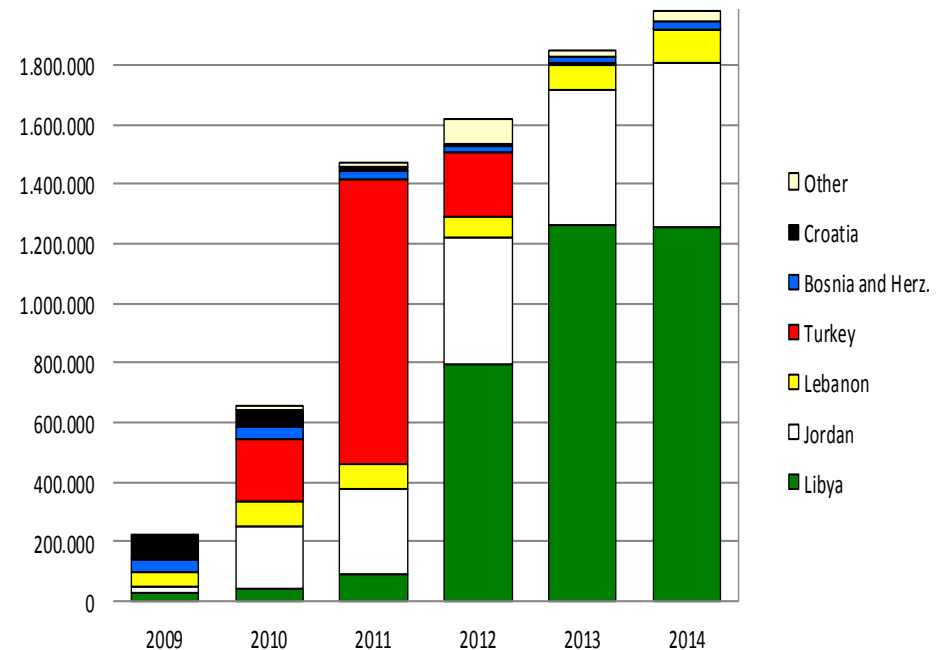


Live export by destination in percent and Head

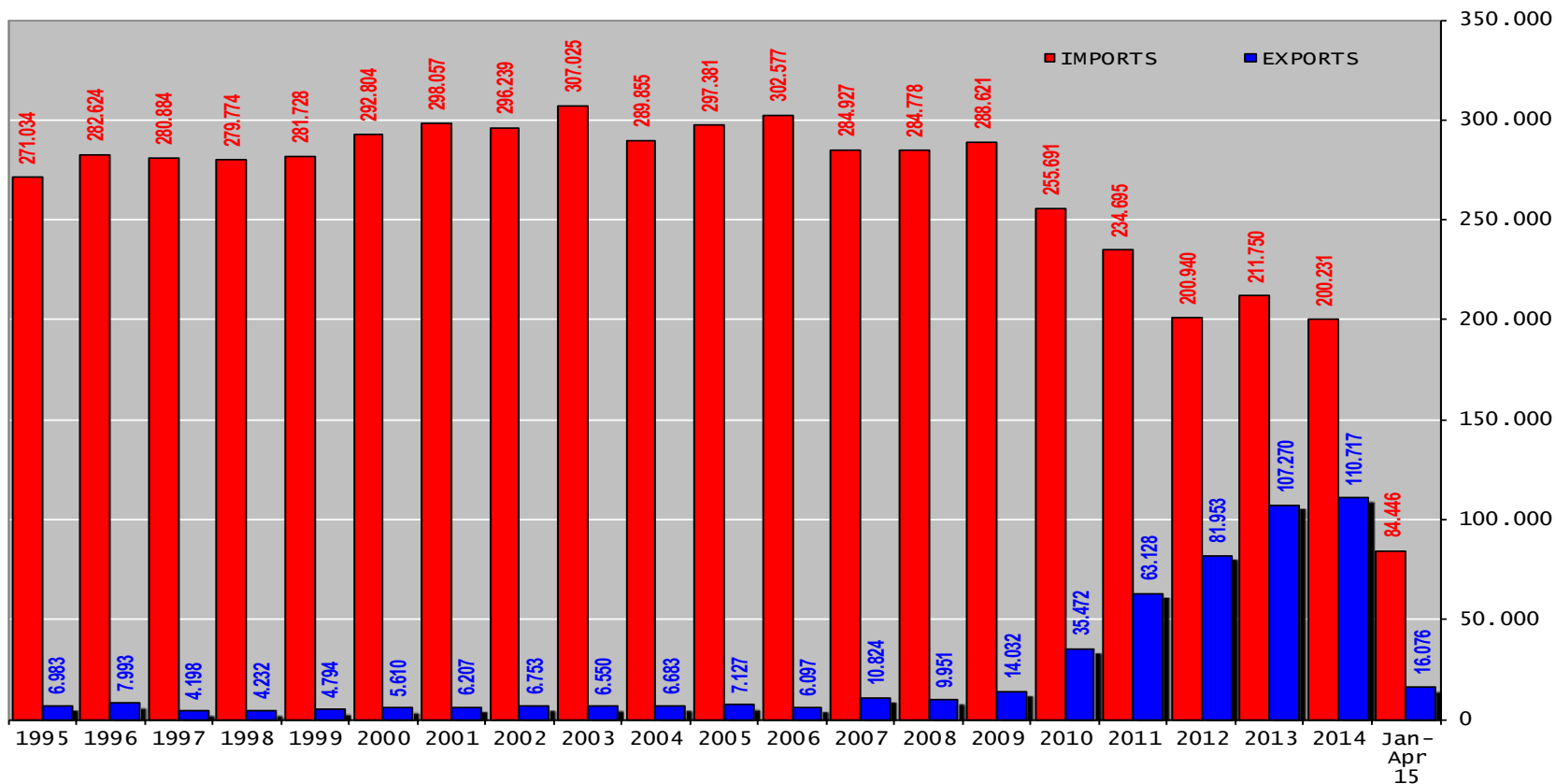
Repartition of Live lamb and sheep export
by destination in nr of heads



Repartition of Live lamb and sheep export
by destination in nr of heads
2014 = 1.980.293 live animals



■ EU Sheep and Goat Meat Trade Balance, tonnes cwe



UTILISATION OF SHEEPMET AND GOATMEAT TARIFF QUOTAS IN 2015

EU-28 : January > December 2015

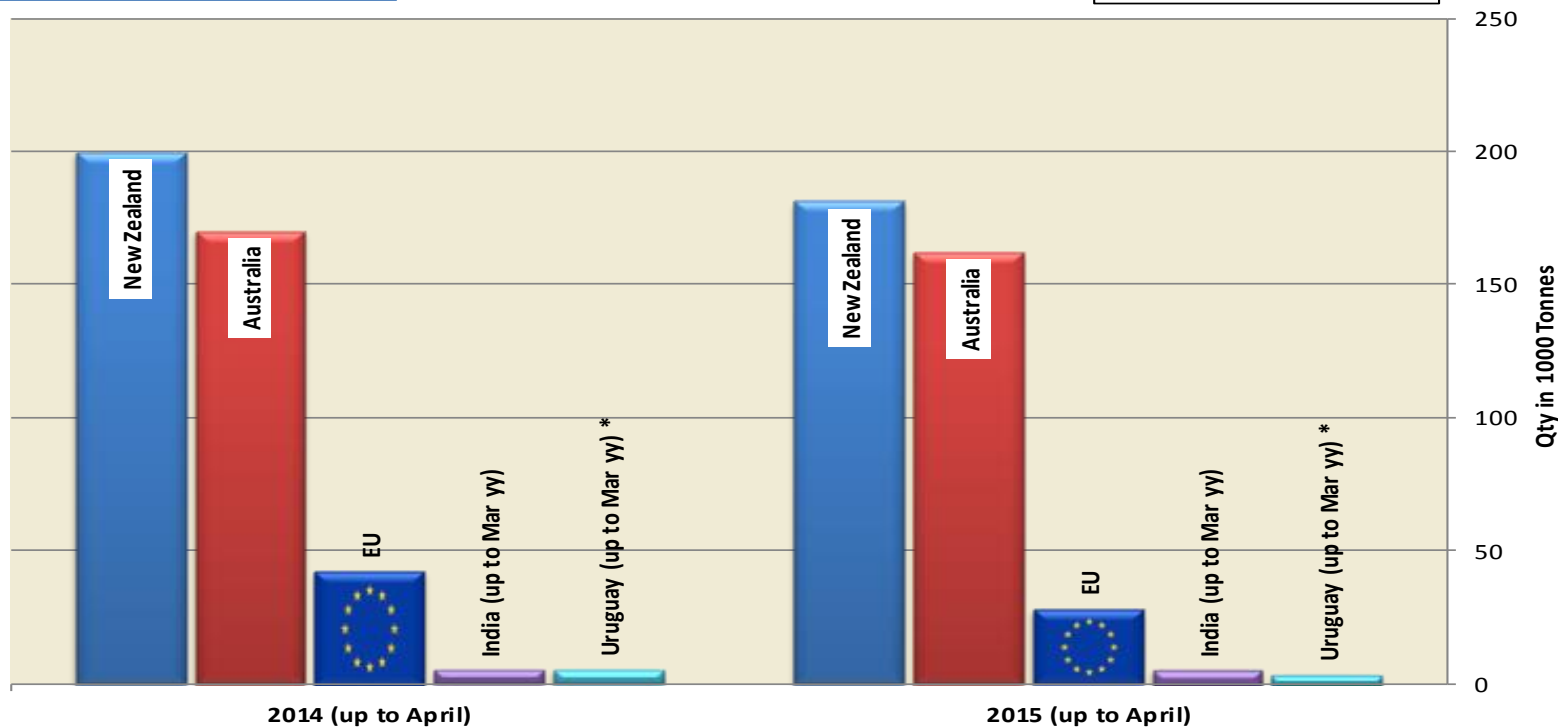
Reg. 1354/2011

COUNTRY GROUP No	CN CODES	ORIGIN	ORDER NUMBER	Period: 01/01/2015 - 10/6/2015			Unit: tonnes cwe	
				Annual quota	Balance (remaining amount)	Actual import	Quota use %	1/1/2014 - 19/6/2014
1	0204	Argentina	09.2011	23.000	22.692	308	1%	900
		Australia	09.2012	19.186	10.484	8.702	45%	10.094
		New Zealand	09.2013	228.254	134.836	93.418	41%	91.306
		Uruguay	09.2014	5.800	4.623	1.177	20%	1.750
		Chile	09.1922	7.400	6.065	1.335	18%	2.020
		Norway	09.0781	300	300	0	0%	0
		Greenland	09.0693	100	100	0	0%	0
		Faeroes	09.0690	20	19	1	4%	0
		Turkey	09.0227	200	200	0	0%	0
		Others	09.2015	200	200	0	0%	12
		Erga Omnes	09.2016	200	0	200	100%	200
2	0204 0210 99 21 0210 99 29 0210 99 60	Iceland	09.0790	1.850	1.700	150	8%	235
3	0104 10 30 0104 10 80 0104 20 90	Erga Omnes	09.2019	92	92	0	0%	0
TOTAL				286.602	181.313	105.289	37%	106.517

Main Exporters of SHEEP&GOAT Products (up to April)

Source : GTA & Eurostat

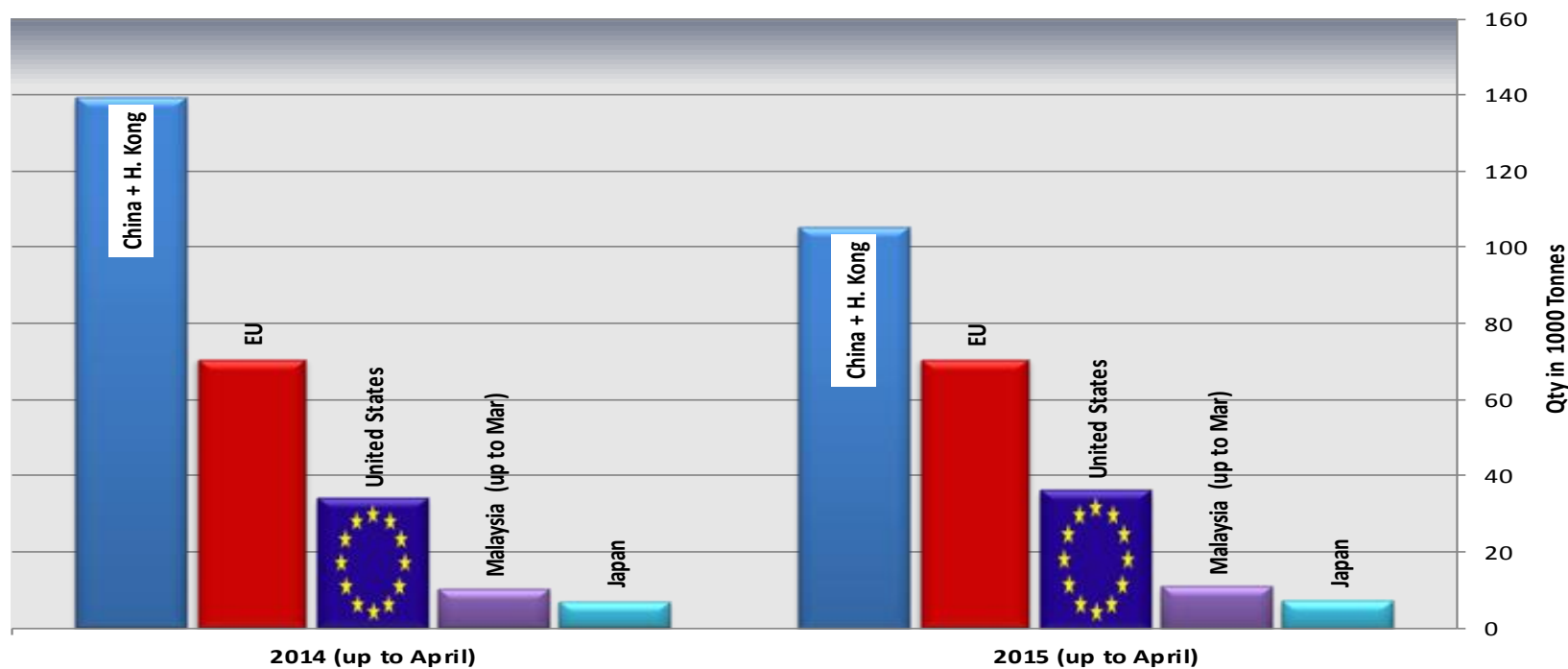
(excl. live animals)



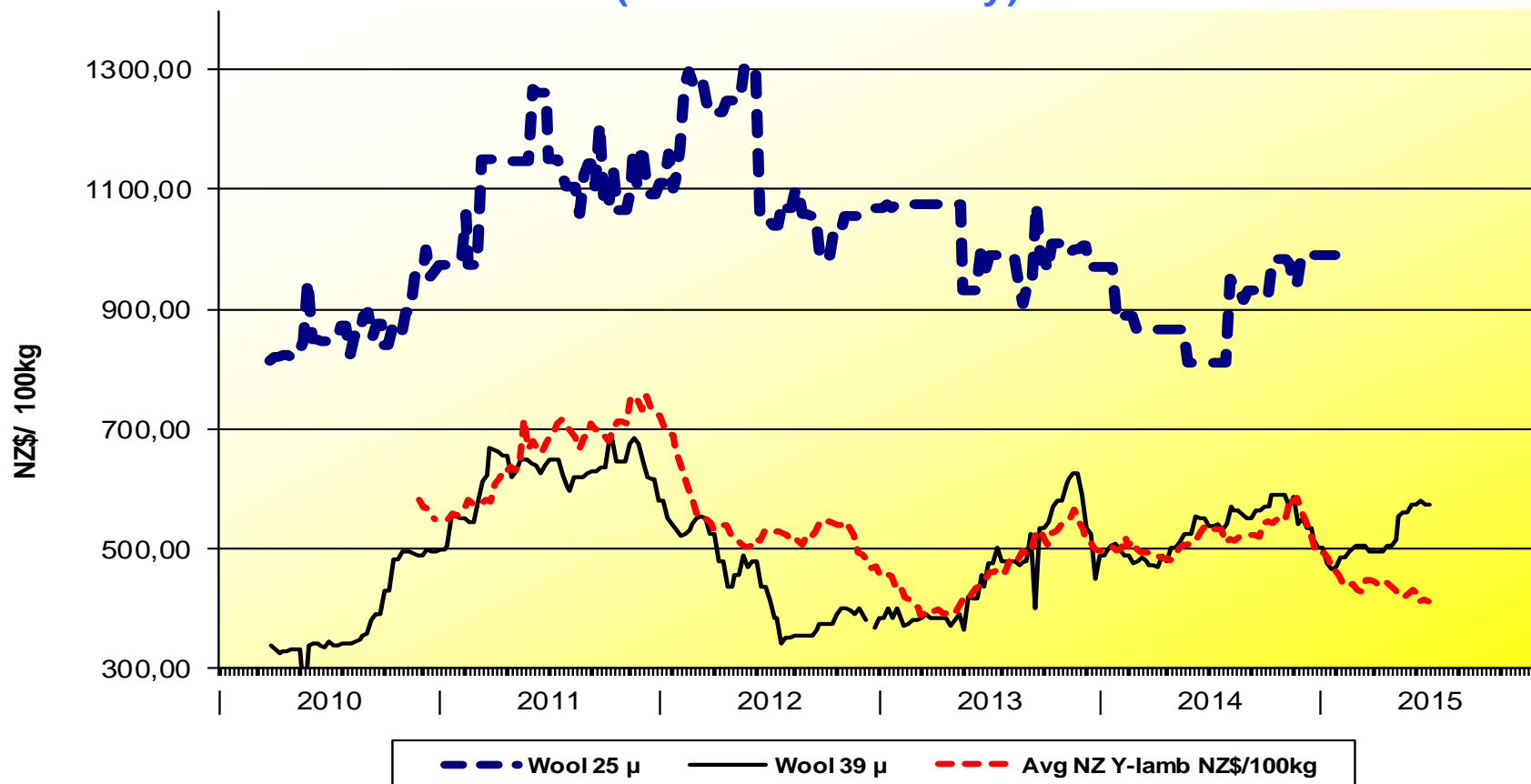
Main Importers of SHEEP&GOAT Products (up to April)

Source : GTA & Eurostat

(excl. live animals)



New Zealand lamb and wool prices (NZ Farmers weekly)



Source: NZ Farmers weekly

Experts estimates of May 2015

FORECAST QUESTIONNAIRE - SHEEP AND GOAT MEAT BALANCE

								Change	
		2010	2011	2012	2013	<u>2014</u>	<u>2015(f)</u>	<u>14/13 %</u>	<u>15/14 %</u>
GIP/ PIB/ BEE									
AT	'000 head						7,914		
BE	'000 head	0,777	0,650	0,488	0,588	0,489	0,536	-16,8%	9,6%
BG	'000 head	1,597	1,470	1,450	1,383	0,133	0,980	-90,4%	635,5%
CZ	'000 head	2,189	2,418	2,460	2,548	2,648	2,648	3,9%	0,0%
DE	'000 head	40,400	42,000	38,600	34,400	31,200	31,500	-9,3%	1,0%
IE	'000 head	41,300	39,000	45,200	49,900	53,500	54,500	7,2%	1,9%
EL	'000 head	98,000	105,000	100,000	98,000	80,000	72,000	-18,4%	-10,0%
ES	'000 head	149,488	148,624	136,272	147,608	136,500	136,500	-7,5%	0,0%
FR	'000 head	111,543	116,605	112,131	107,243	107,181	106,382	-0,1%	-0,7%
HU	'000 head	9,609	9,551	9,581	9,258	9,637	9,545	4,1%	-1,0%
IT	'000 head	32,018	30,789	30,780	20,267	10,389	17,734	-48,7%	70,7%
CY	'000 head								
NL	'000 head	16,800	16,800	16,700	16,400	16,700	16,300	1,8%	-2,4%
PL	'000 head	3,209	3,129	3,013	3,046	2,950	2,857	-3,2%	-3,2%
PT	'000 head	20,116	19,864	18,056	16,993	17,385	17,385	2,3%	0,0%
SI	'000 head								
SF	'000 head	0,790	0,950	0,940	0,950	1,020	1,100	7,4%	7,8%
UK	'000 head	292,300	298,900	285,000	298,900	312,300	329,800	4,5%	5,6%
	Total	820,136	835,750	800,671	807,484	782,032	807,680		
	EU		1,9%	-4,2%	0,9%	-3,2%	3,3%	-3,2%	3,3%
	Off-Slaughter	776,381	789,097	759,892	760,291	750,155	748,173	Official slaughter	
	OSH-Slaughter	138,870	143,980	134,570	126,670	Slaughter other than in official slaughterhouses			

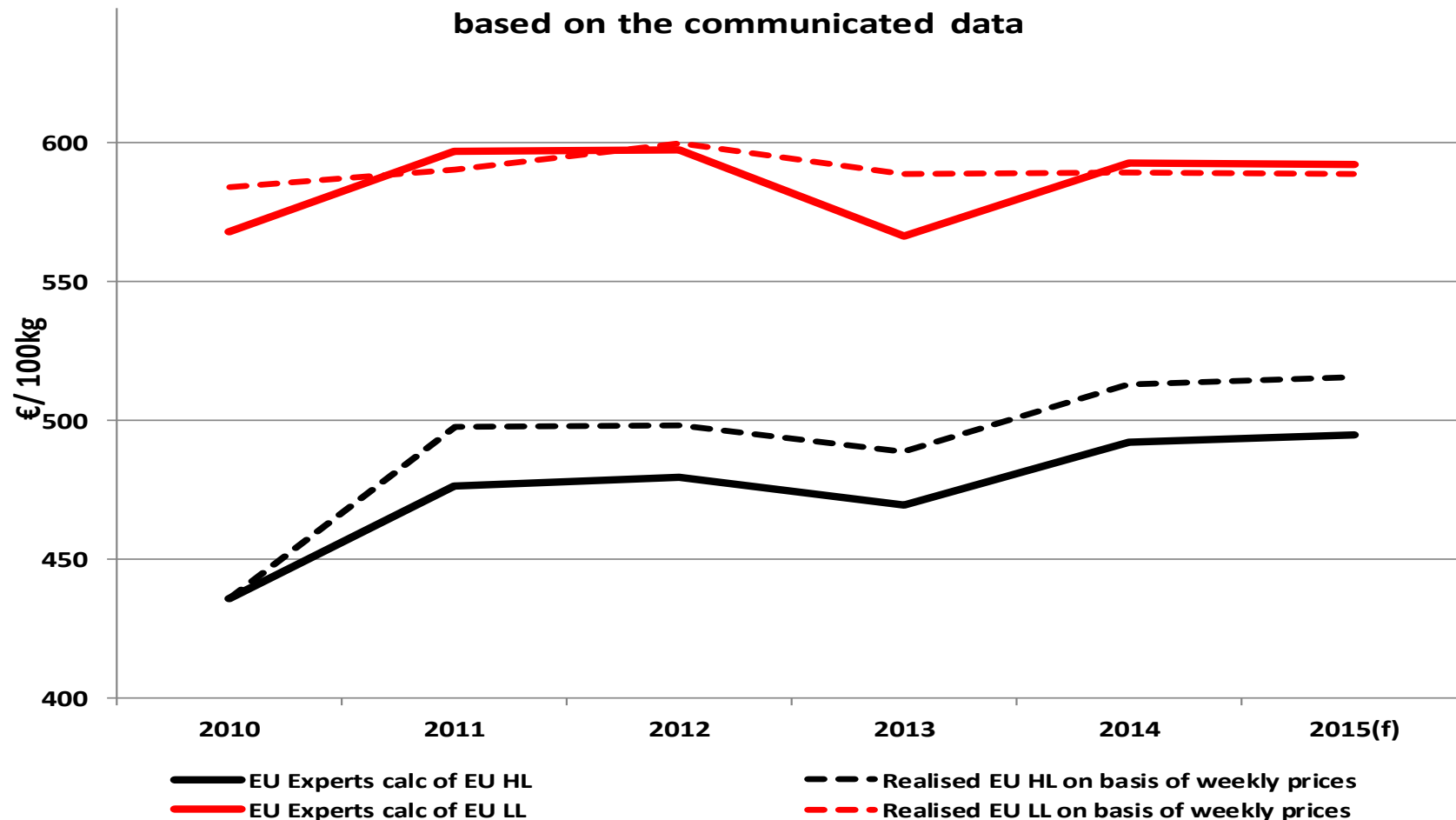
Experts estimates of May 2015

FORECAST QUESTIONNAIRE - SHEEP AND GOAT MEAT BALANCE

								Change	
		2010	2011	2012	2013	2014	2015(f)	14/13 %	15/14 %
1 Price - heavy lambs >= 13.1 kg									
AT	'EUR/100 kg cwe				529,00	526,00	530,00	-0,6%	0,8%
BE	'EUR/100 kg cwe								
CZ	'EUR/100 kg cwe	350,00	350,00	360,00	370,00	380,00	380,00	2,7%	0,0%
DE	'EUR/100 kg cwe	425,30	478,40	517,10	512,00	520,00	540,00	1,6%	3,8%
IE	'EUR/100 kg cwe	439,00	478,00	462,00	457,00	480,00	480,00	5,0%	0,0%
EL	'EUR/100 kg cwe	370,00	388,00	366,00	352,00	359,00	359,00	2,0%	0,0%
ES	'EUR/100 kg cwe	489,63	559,63	561,28	503,87	558,73	558,73	10,9%	0,0%
FR	'EUR/100 kg cwe	587,70	610,80	624,20	621,70	635,00	652,00	2,1%	2,7%
CY									
HU	'EUR/100 kg cwe	490,00	570,00	554,00	520,00	507,00	525,00	-2,5%	3,6%
NL	'EUR/100 kg cwe	463,00	509,00	541,00	504,00	525,00	515,00	4,2%	-1,9%
PL	'EUR/100 kg cwe	334,00	380,00	387,00	372,00	385	380	3,5%	-1,3%
SI	'EUR/100 kg cwe								
SF	'EUR/100 kg cwe	282,45	287,11	350,14	390,40	400,00	410,00		
UK	'EUR/100 kg cwe	452,40	501,70	499,70	488,90	518,80	515,00	6,1%	-0,7%
EU Experts calc of EU HL		435,75	476,07	479,45	469,27	492,28	494,62	4,9%	0,5%
Realised EU HL on basis of we		436,03	497,84	497,96	488,88	512,92	515,36		
2 Price - light lambs =< 13.0 kg									
BG	'EUR/100 kg cwe	544,00	550,00	600,00	570,00	600,00	570,00	5,3%	-5,0%
CZ	'EUR/100 kg cwe	480,00	480,00	480,00	480,00	490,00	490,00	2,1%	0,0%
EL	'EUR/100 kg cwe	532,00	554,00	523,00	503,00	513,00	513,00	2,0%	0,0%
ES	'EUR/100 kg cwe	644,67	690,73	690,00	625,00	676,06	676,06	8,2%	0,0%
HU	'EUR/100 kg cwe	555,00	640,00	631,00	585,00	590,00	610,00	0,9%	3,4%
IT	'EUR/100 kg cwe	517,89	526,27	605,70	634,97	624,46	629,46	-1,7%	0,8%
PL	'EUR/100 kg cwe	420,00	451,00	462,00	477,00	457,00	450,00	-4,2%	-1,5%
PT	'EUR/100 kg cwe	424,00	442,00	438,00	436,00	470,00	470,00	7,8%	0,0%
SI	'EUR/100 kg cwe								
EU Experts calc of EU LL		567,82	597,08	597,52	566,67	592,98	592,57	4,6%	-0,1%
Realised EU LL on basis of we		584,30	590,52	599,88	588,72	589,49	589,08		

Price forecast for Heavy and Light Lamb

based on the communicated data



Where to find data:

- http://ec.europa.eu/agriculture/markets/index_en.htm
- Click on link: *Sheepmeat and Goatmeat*
- Click on link: *Presentations and prices*
(righthand side under: in this chapter)
- Choose the item (link) you want