



EU outlook for meat and dairy

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#AgriOutlook

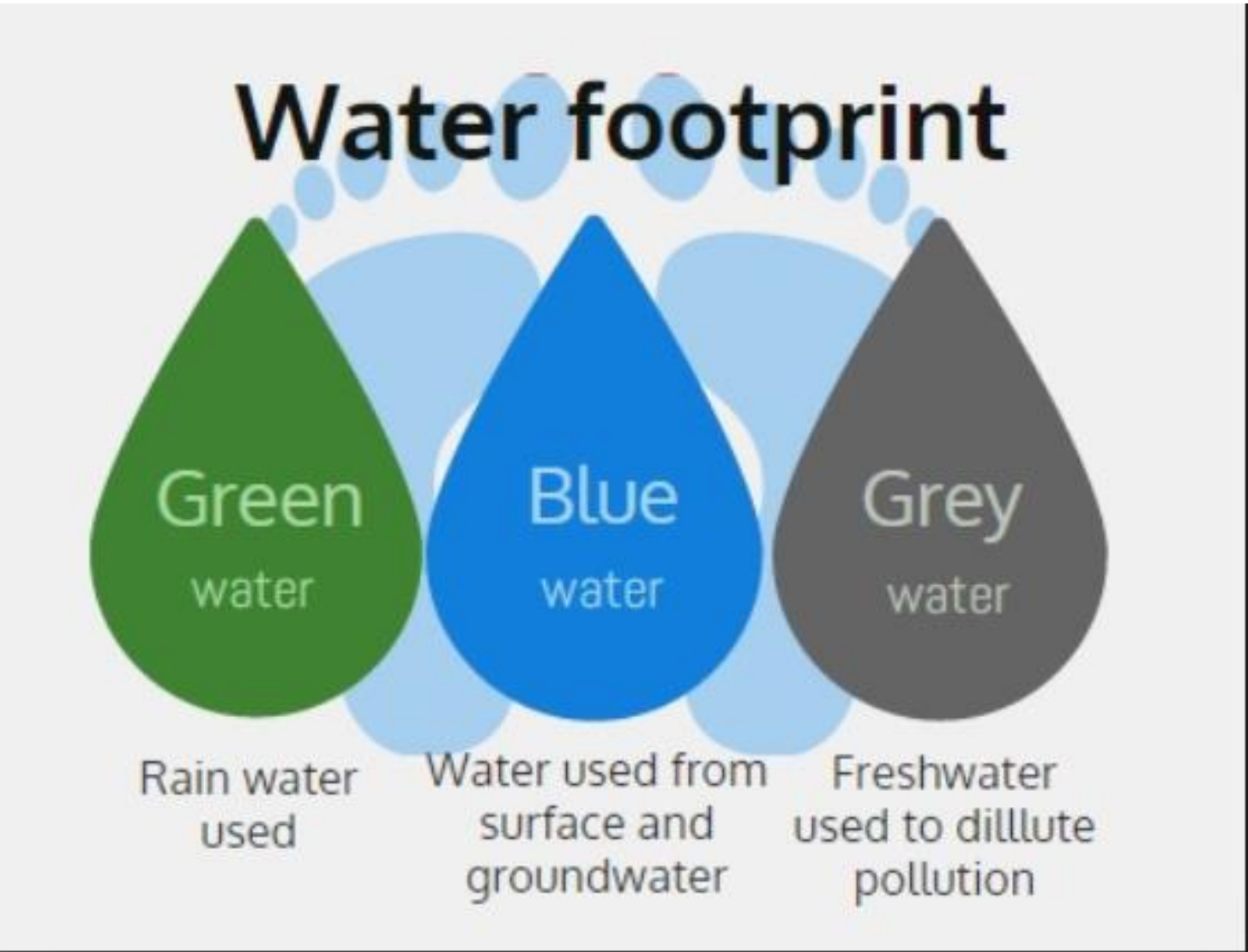
Agriculture
and Rural
Development



We hear



GREENHOUSE GAS EMISSIONS GLOBALLY BY LIVESTOCK SPECIES



World Health Organization
Classifies Processed Meat as Being Cancer Causing

Animal welfare



Now... sli.do

Between 2010 and 2017, *per capita* meat consumption in the EU

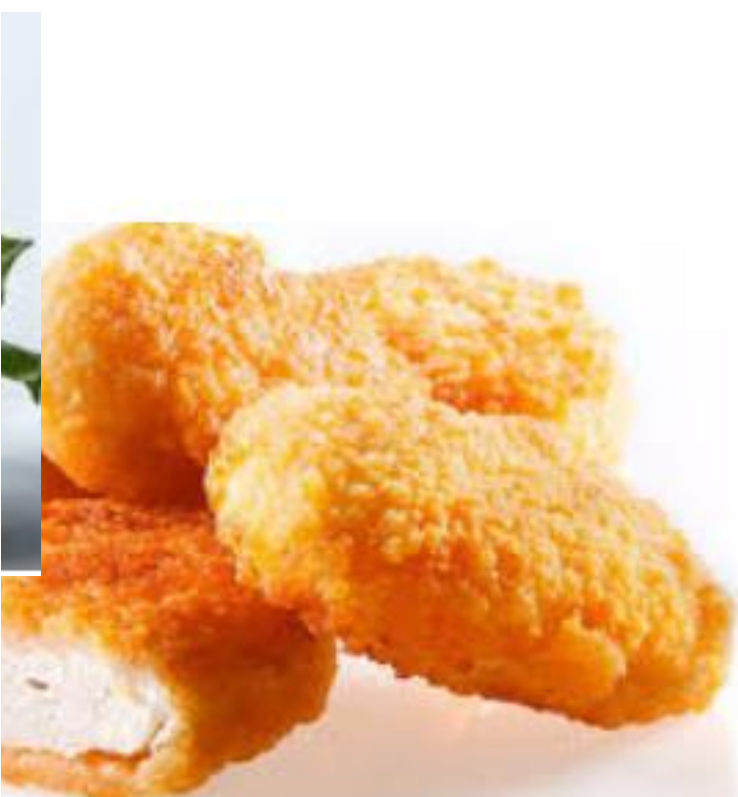
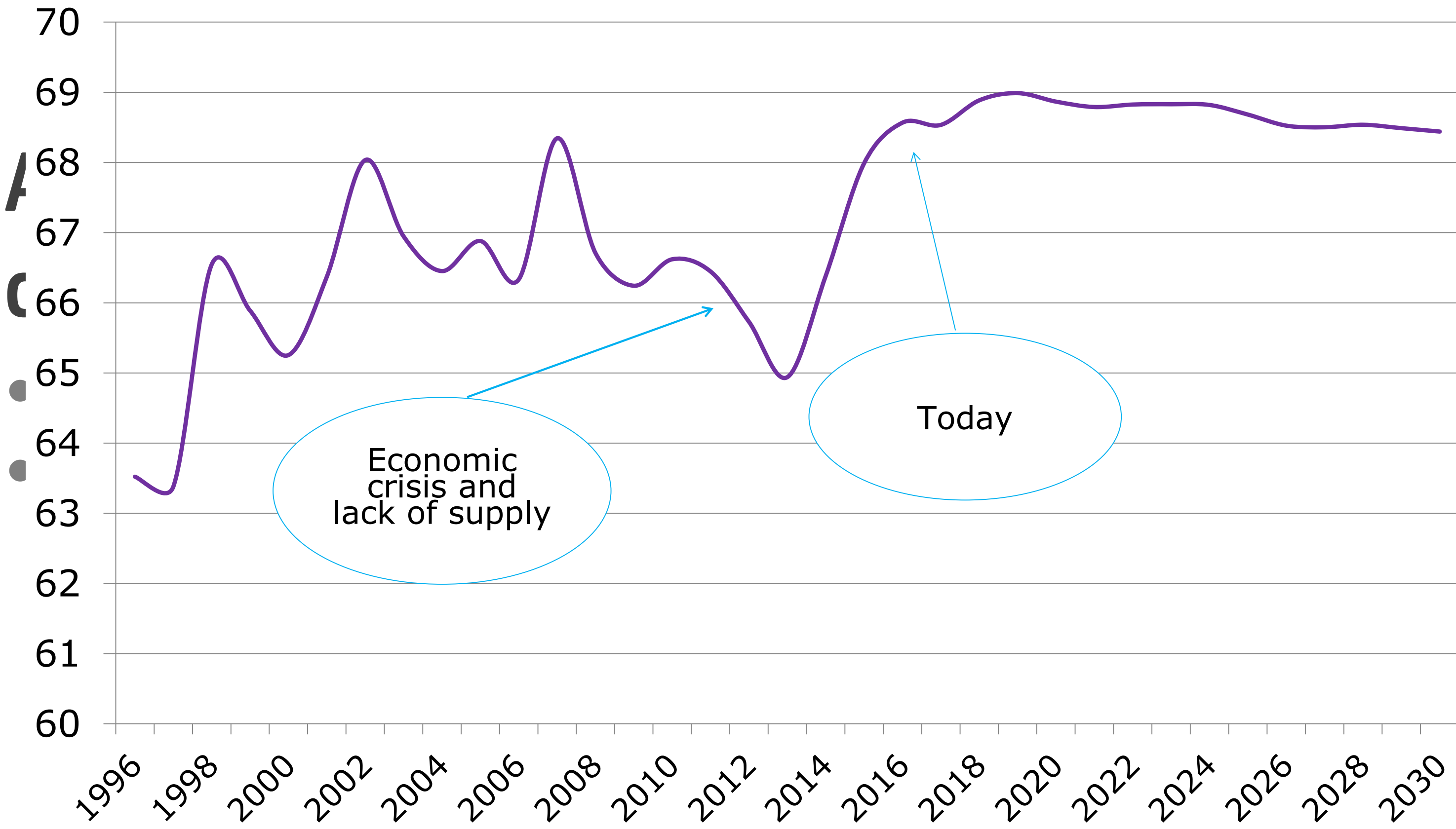
1. Increased
2. Remained stable
3. Decreased

We observe and we expect

A small decline in meat consumption

- Less beef and pork and slightly more poultry

EU meat consumption (kg/capita, retail weight)



An increase in global import demand lower than in the last decade

Import demand growth

- Meat: +500 000 t per year
- Dairy products: +1 Mt per year

Main importers

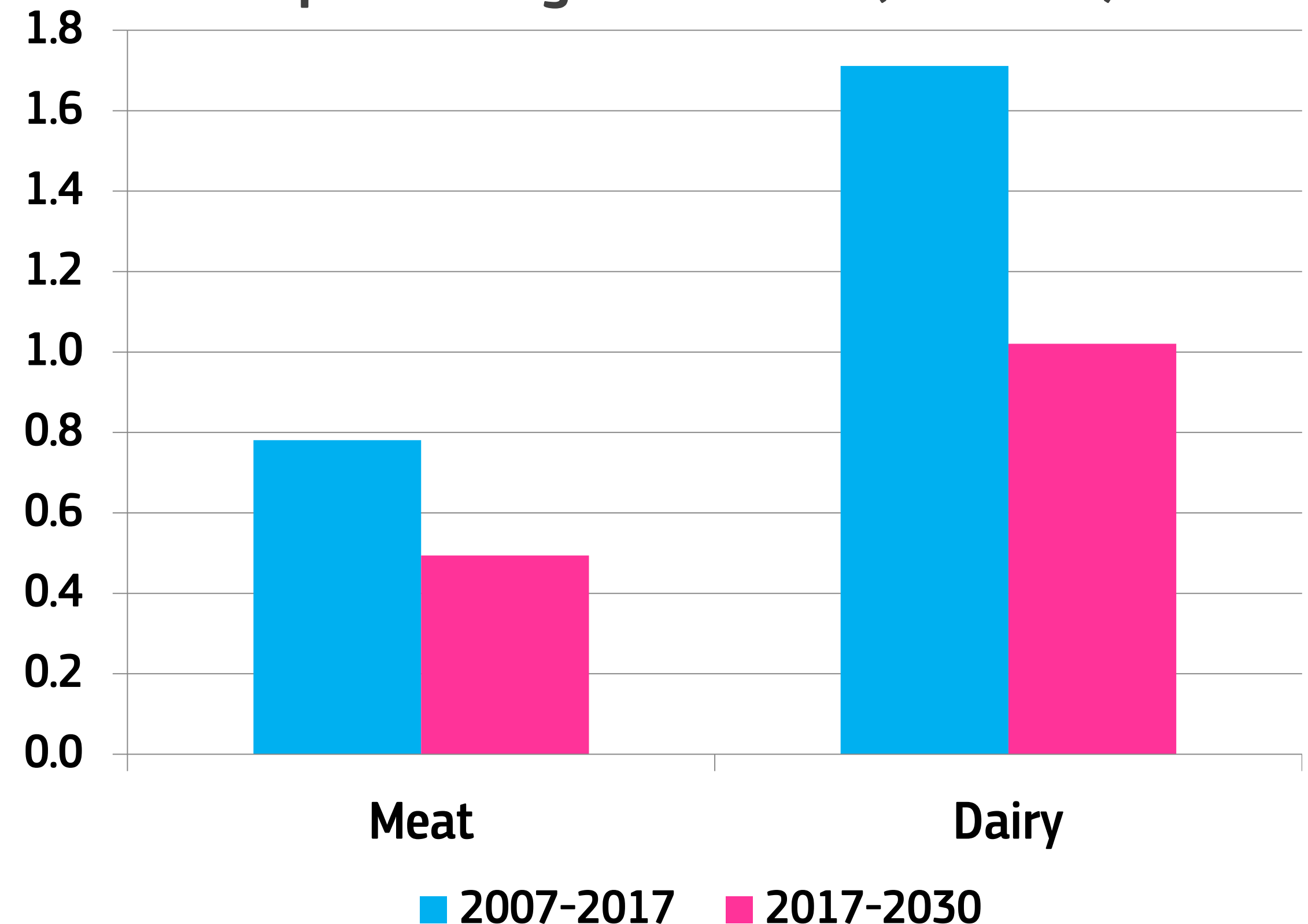
- China, East Asia and Africa

Towards more

- Value added products
- Technical products



Average annual increase in dairy and meat products global trade (million t)

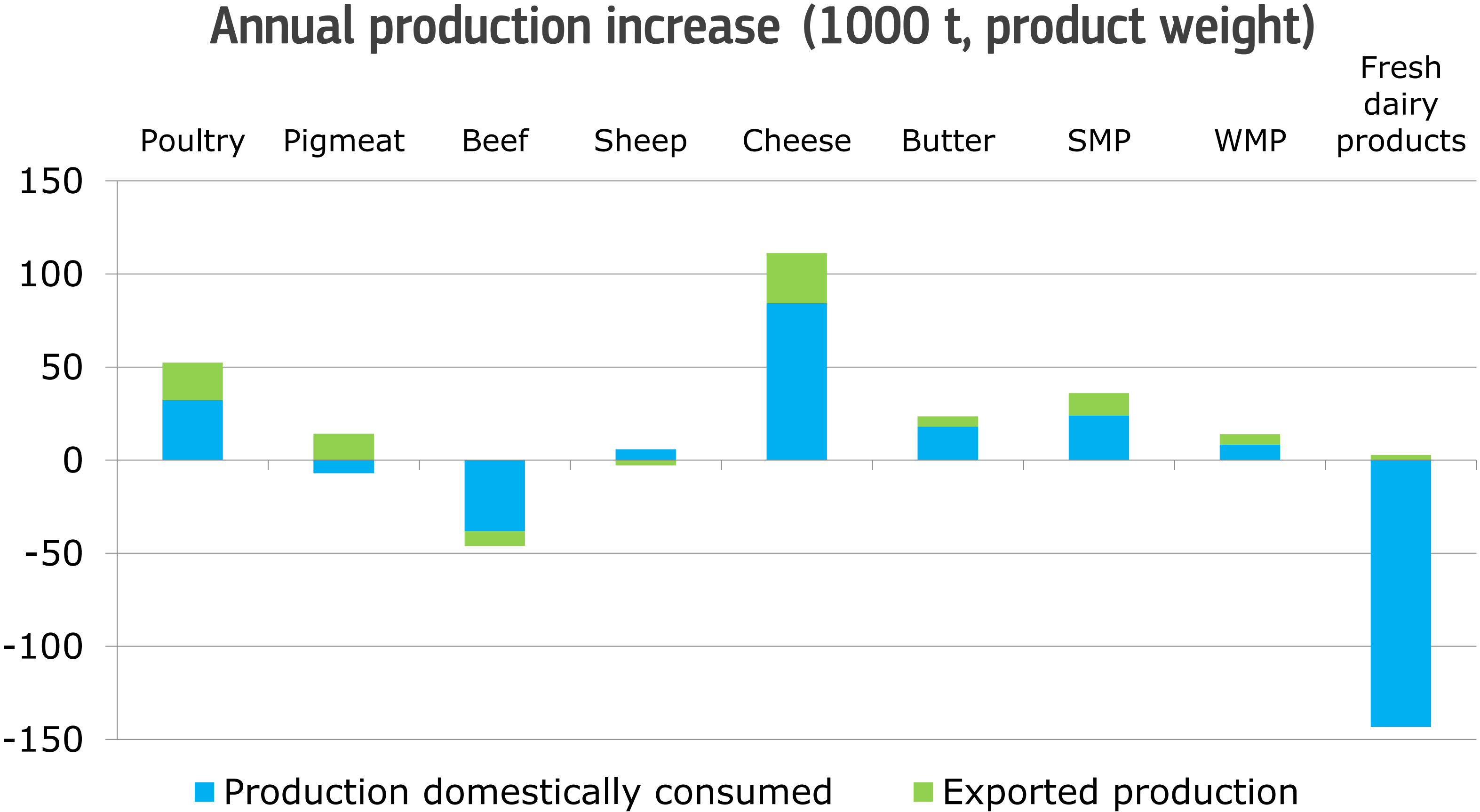


Note: Milk equivalent for dairy products, methodology accounting for all components of milk, coefficients used: 3.58 for cheese, 6.57 for butter, 7.57 for SMP and 7.56 for WMP

The EU domestic market main driver of EU production growth

Stable meat production
47.5 Mt in 2030
Less beef more poultry

Moderate increase in milk
production:
182 Mt in 2030, +18 Mt in
13 years

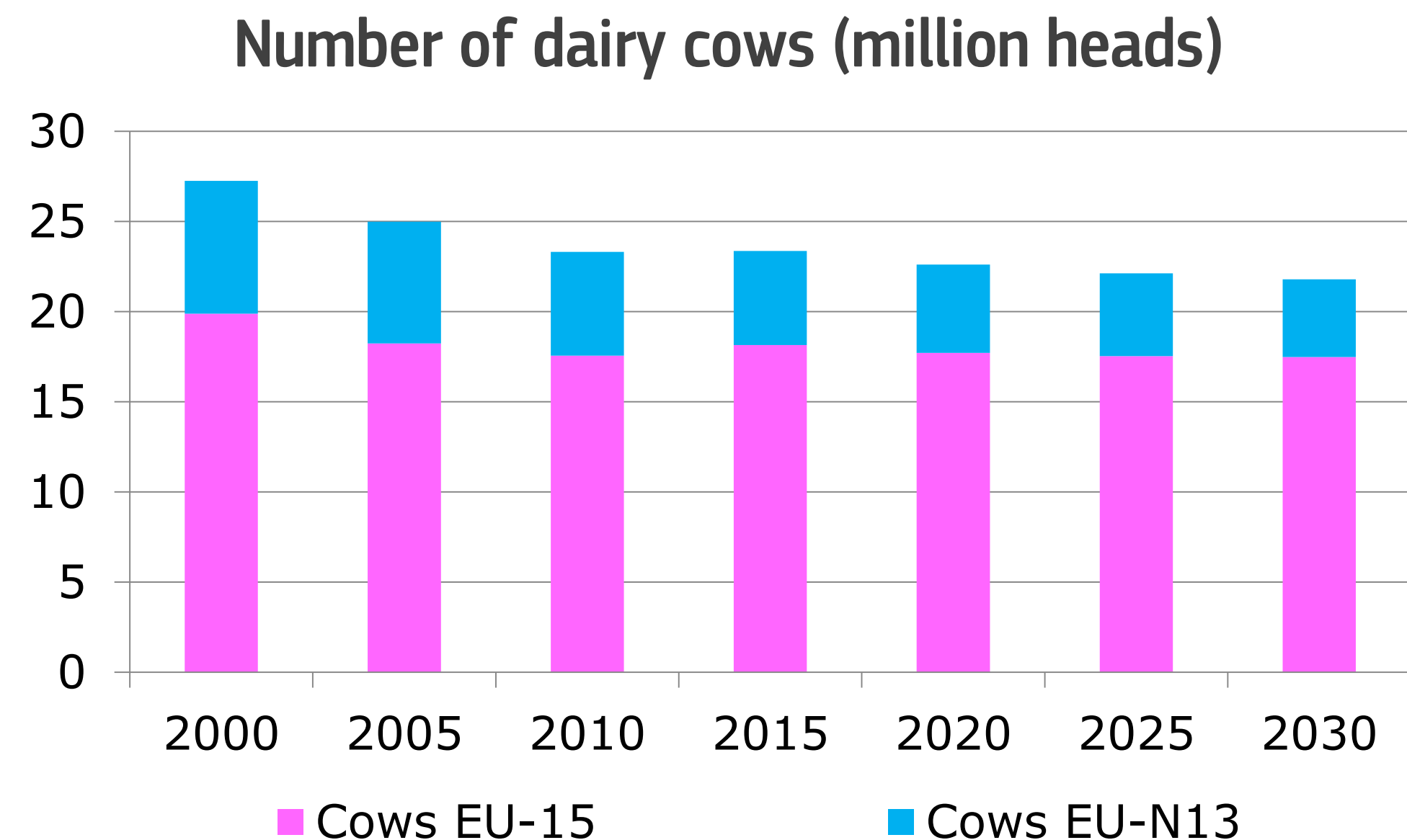


Towards changes in production systems

Driven by consumer expectations and to create value

The example of milk production

- Towards 10% of organic milk (assumption)
- Yield gap => lower decrease in cow numbers



Towards changes in production systems Driven by sustainability requirements and COP 21

Main issues in livestock production

- Water and air quality (Ammonia)
- GHG emissions
- Landscape & pastures

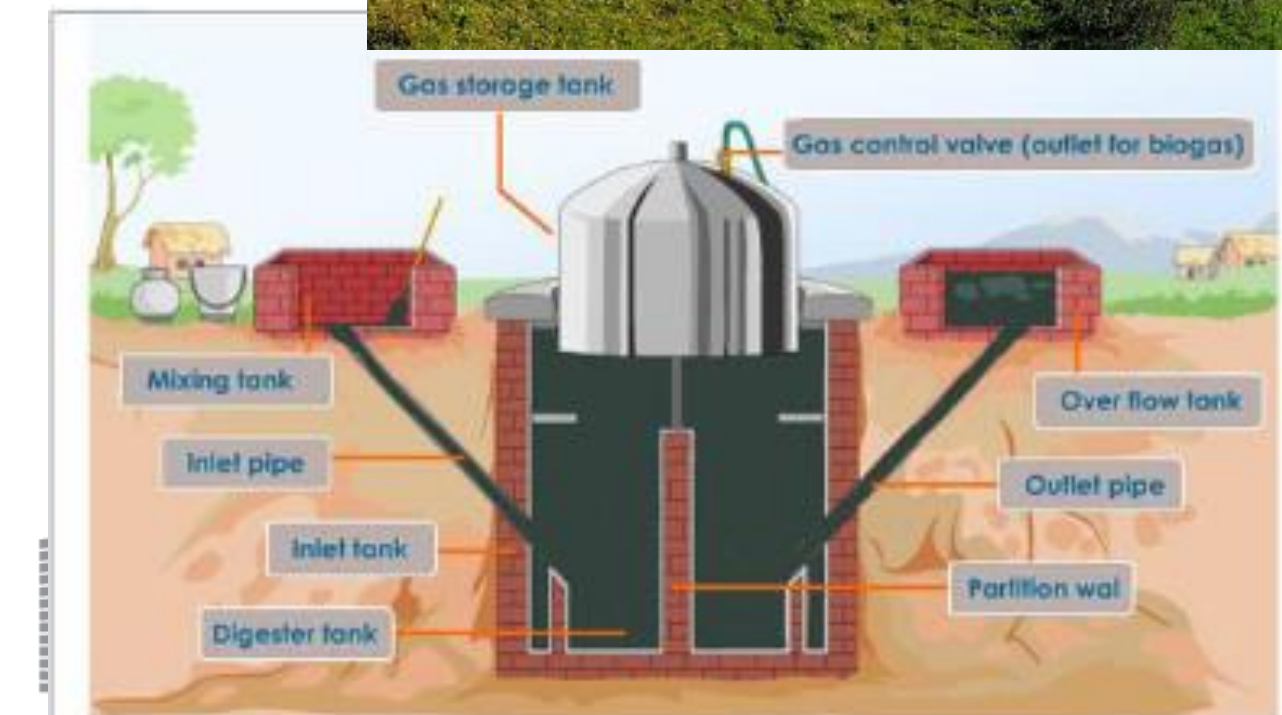
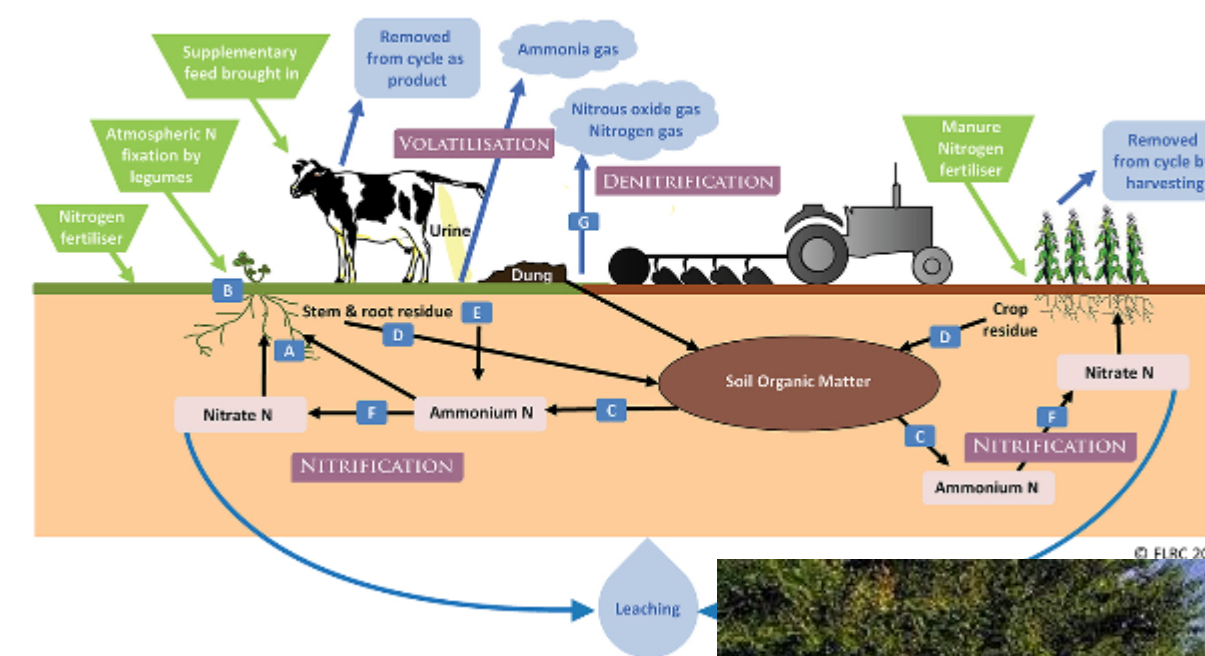
Potentially limiting supply development

- and leading to reductions in animal numbers (e.g. NL in 2017)

Leading to changes in production systems =>

- nutrient management plan, biogas plants, better herd and pasture management, change in feed...
- production location and competition between productions

Figure 1. Inputs, outputs and transformations of nitrogen in farming systems



and
opment

Thank you

Agricultural Outlook

https://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook_en

Markets briefs

https://ec.europa.eu/agriculture/markets-and-prices/market-briefs_en

Market observatories

https://ec.europa.eu/agriculture/market-observatory_en

CAP reform

https://ec.europa.eu/agriculture/future-cap_en



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