



Estimation of bovine and pig production pattern and consumption in EU using SEUROPOP grid.



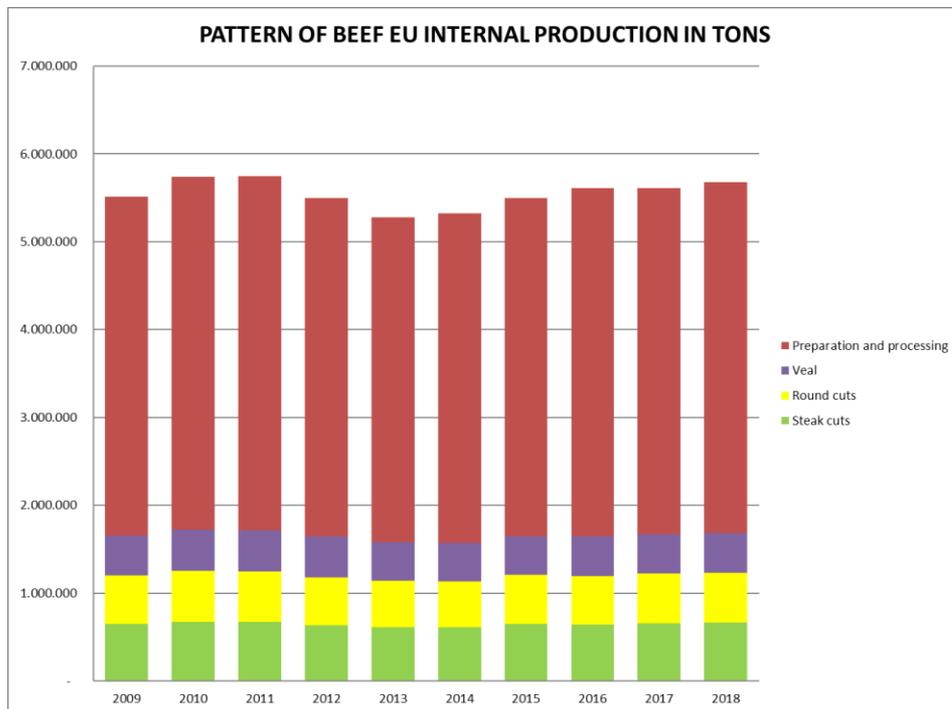
- **Meeting with experts scheduled for the 2nd of April 2019;**
- **For beef and veal the methodology is complete and data updating is performed on a monthly basis;**
- **For pig methodology is still under definition to estimate production and consumption starting from the lean meat content produced (certain data)**
- **For poultry, sheep and goat the methodology will be developed in the coming months.**



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BEEF AND VEAL

2018 EU Production



Total production in c.w. increased by **1.28%** in 2018vs2017

Total saleable EU production in 2018 was 5.674.797 t **(+1,1%)**.

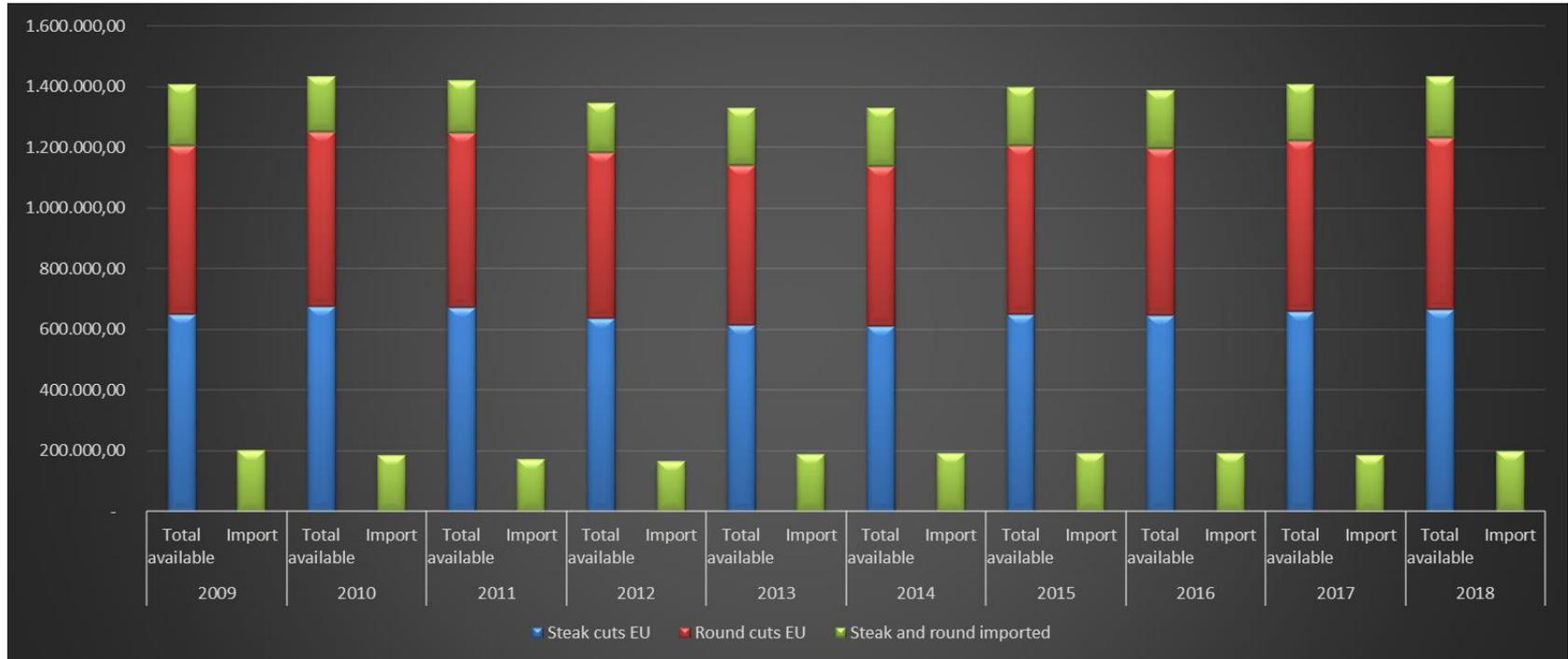
- steak cuts 664.298t **(+0.9%)**
(11,7% of saleable yield)
- round cuts 568.255t **(+0.7%)**
(10% of saleable yield)
- prep. and processing 3.992.435t **(+1.34%)** (70.3% of saleable yield)
- Veal 449.808t **(+0.6%)**
(8% of saleable yield)

Non food increased by **1.56%**

As percentage of c.w.

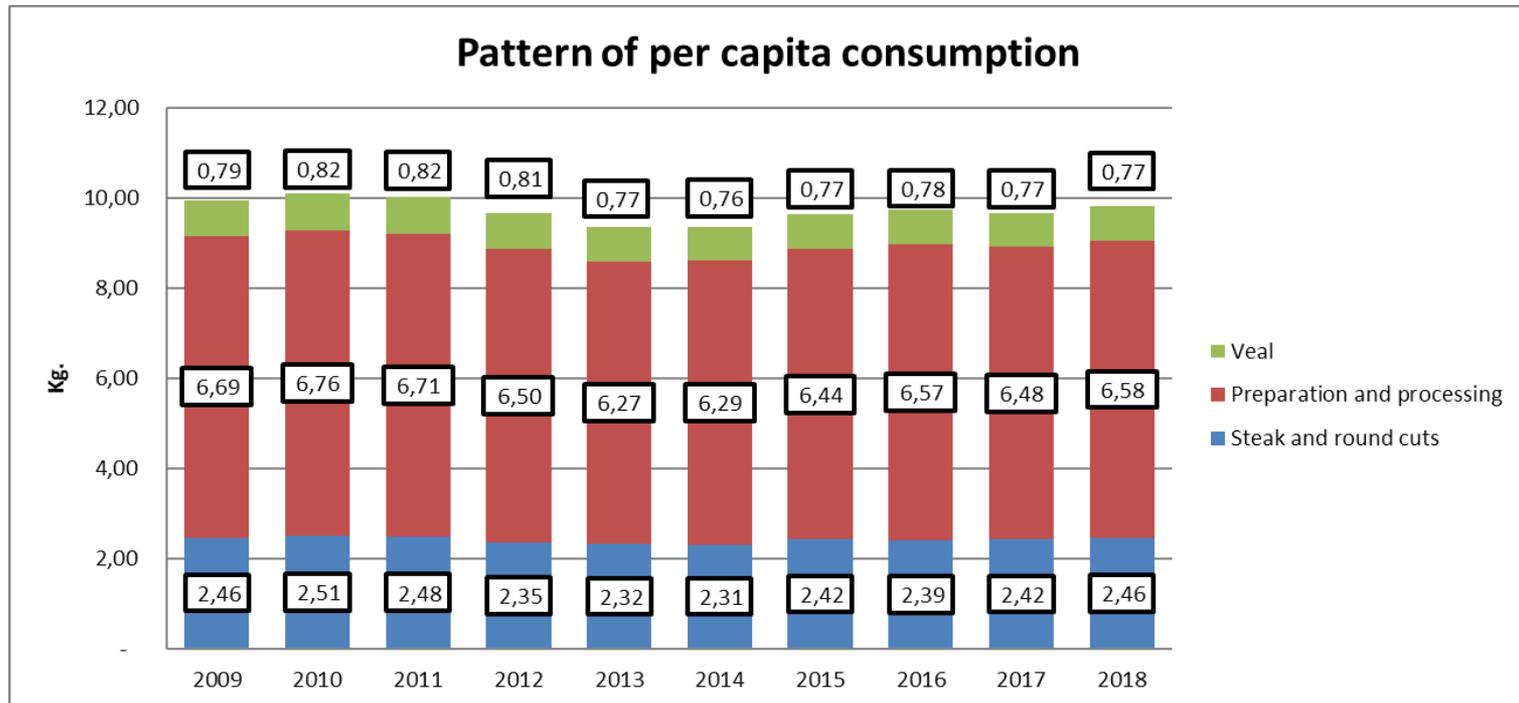
- 8,3 % steak cuts
- 7 % round cuts
- 50 % prep. and processing
- 5,7 % veal

TOTAL: 71 % Bones, waste, fat: 29 %



Total availability of steak and round cuts in 2018 increased by 1,5%, mainly due to imports (+7%) and internal production increase (+0,8%)

Imports accounted for 14% of the saleable steak and round cuts available in the EU.



The slight increase in the EU population softened the increase in per-capita consumption estimation.



Assumptions that need to be “validated” by expert meeting:

1. The use of only 1 **cut calculator (AHDB)** to split carcass yield into different cuts;
2. The **conformation and fat cover classes (E-U-R- + 1/3 O)** from which steak and round cuts are produced;
3. The **transformation coefficients*** to calculate retail weight from product weight for I/E;
4. The **classification of I/E CN codes** into different categories;
5. The **reduction coefficient*+** (12%) to take into account retail and domestic losses.

*Russo et al. Consumo reale di carne e di pesce in Italia. Dal consumo apparente al consumo reale con il metodo della Detrazione Preventiva delle Perdite. Franco Angeli Editore, 2017.

+ Russo et al., 2017 and Åsa Lannhard Öberg, MMO, Oct. 2017



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PIG

Agriculture
and Rural
Development

	2012	2013	2014	2015	2016	2017
Production in c.w. (x 1.000 t)	22.650,20	22.546,25	22.750,08	23.859,88	23.871,28	23.647,15
Variation on previous year	-	0,46	0,90	4,88	0,05	- 0,94
Production of lean meat (x 1.000 t)	13.384,79	13.365,88	13.519,79	14.225,35	14.273,75	14.156,46
Variation on previous year	-	0,14	1,15	5,22	0,34	- 0,82
Percentage of lean meat on carcasses (EU average)	59,10%	59,28%	59,43%	59,62%	59,79%	59,87%
Imports of lean meat (1.000 t)	11,45	8,4	5,92	5,13	5,20	5,75
Exports of lean meat (1.000 t)	1.099,35	1.144,00	1.060,50	1.216,70	1.543,53	1.427,01
lean meat available (1.000 t)	12.296,89	12.230,28	12.465,21	13.013,78	12.735,42	12.735,21

12.735.210 t LMC

45% fresh consumed

55% preparations

Avg fat content 10%

	Share of production (EC Commission Report on meat as ingredient 2013)	fat content (CREA - Italy)	weight loss (Russo et al. 2017)
Cooked sausage	0,3	0,26	37
Cooked ham	0,2	0,14	15
Dried sausage	0,15	0,26	37
Dried ham	0,1	0,18	27,5
Others incl. bacon	0,25	0,28	15

5.651.475 t p.w.

7.508.372 t p.w.

Per capita consumption 26 kg/year.

Assumptions that need to be discussed by expert meeting:

1. Shares of fresh/preparation consumption;
2. Percentage of the different preparations on total pig prepared products;
3. Weight losses of the different preparations*;
4. Average fat content for pig meat fresh consumed.



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THANKS YOU FOR YOUR ATTENTION