



# The 2018 EU Agricultural Outlook Conference

THE FUTURE OF FOOD AND FARMING  
FOOD FOR THOUGHT

EU agricultural outlook for meat and dairy

Brussels, 6 -7 December 2018



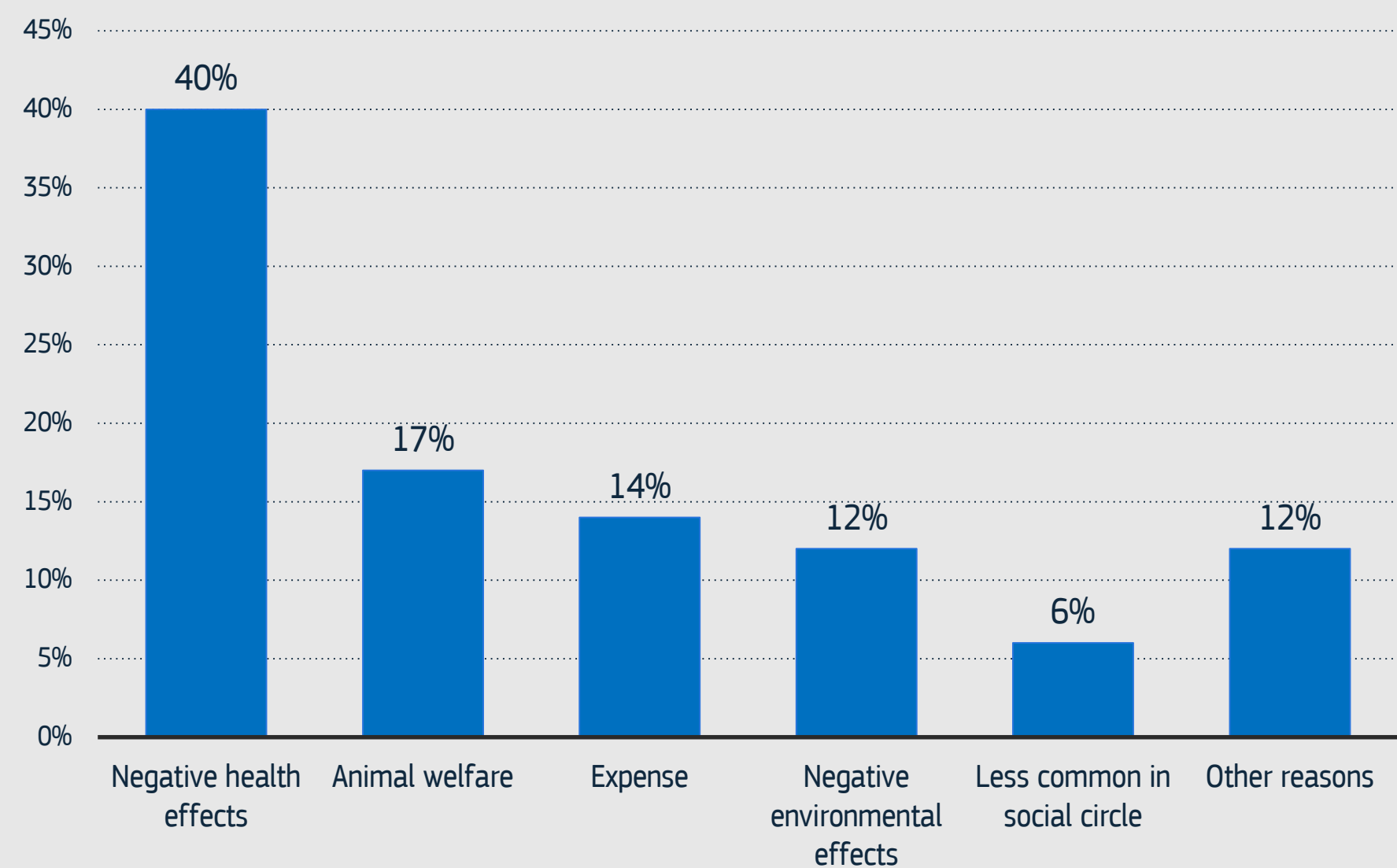
Agriculture  
and Rural  
Development



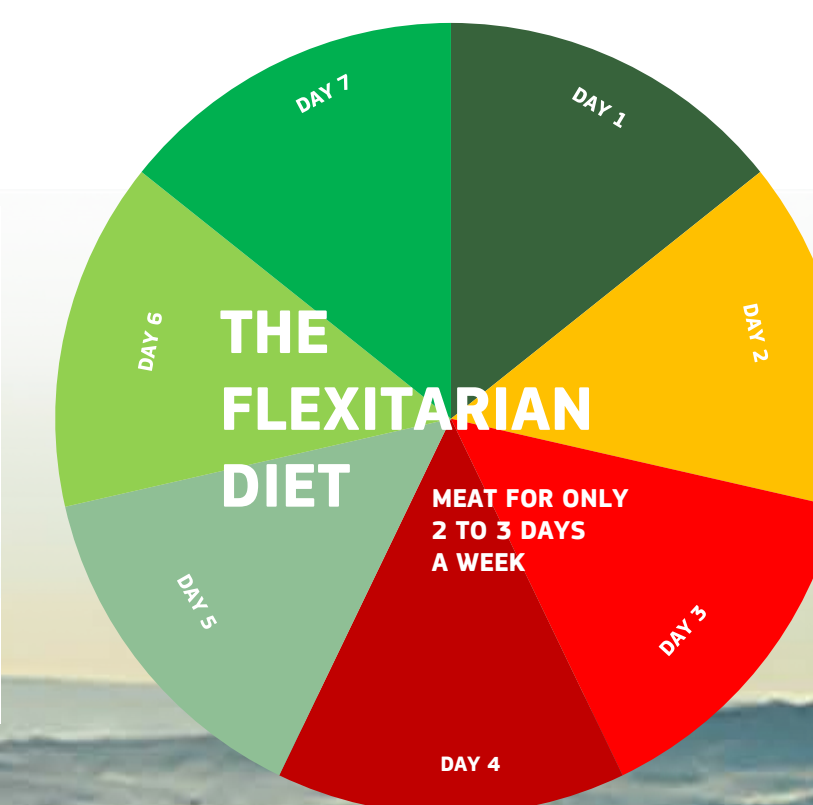
# Meat and dairy consumption pushed down

By societal demands

Main reasons why people are planning to eat less meat within the next five years in Europe as of 2017



Note: Europe; 2017; 13 000 European consumers  
Source: ING



European Commission

Agriculture and Rural Development



# Question for the audience

Go to [slido.com](https://www.slido.com) - event code #AgriOutlook

How much liquid milk is consumed in Europe in 2018?

1. **Less than 30 liters/capita per year**
2. **30 to 60 liters/capita per year**
3. **60 to 100 liters/capita per year**
4. **More than 100 liters/capita per year**



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# Meat and dairy consumption pushed down

by the development of alternative products...

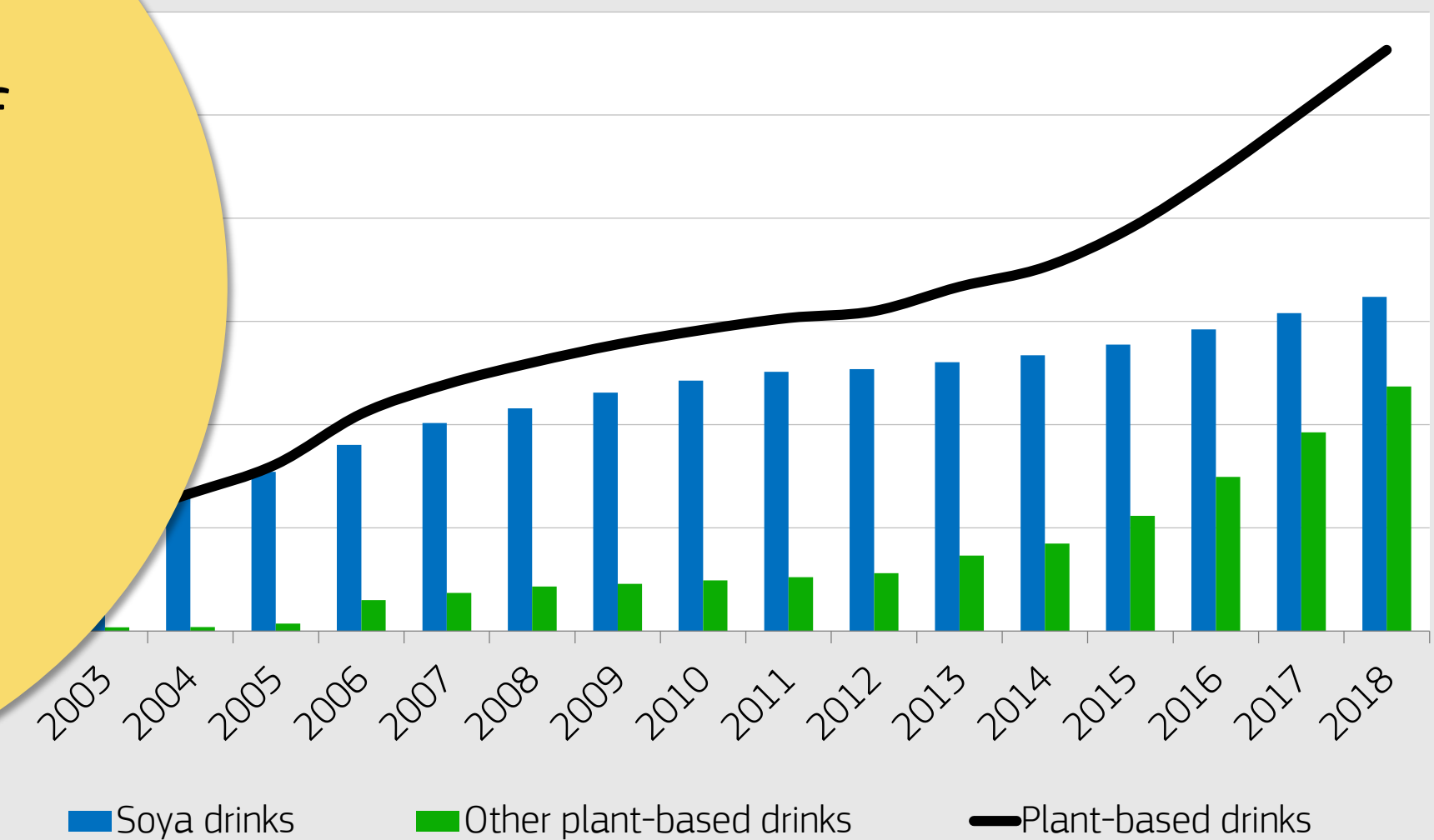


Nevertheless shares of alternative products remain **small**

- **4%** of cow's milk sales

Source: Euromonitor

Retail and foodservice volume of plant-based drinks (million litres)

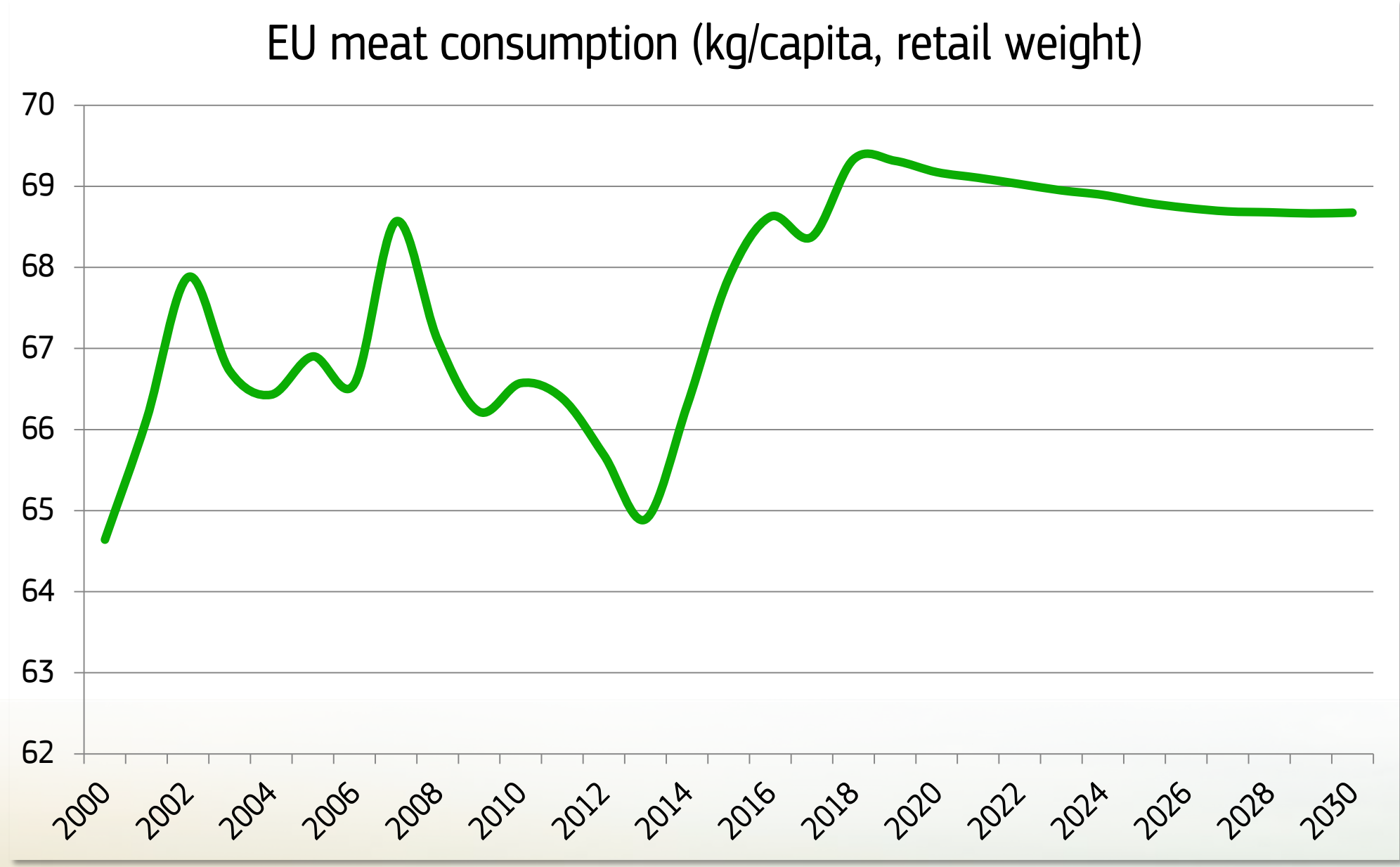
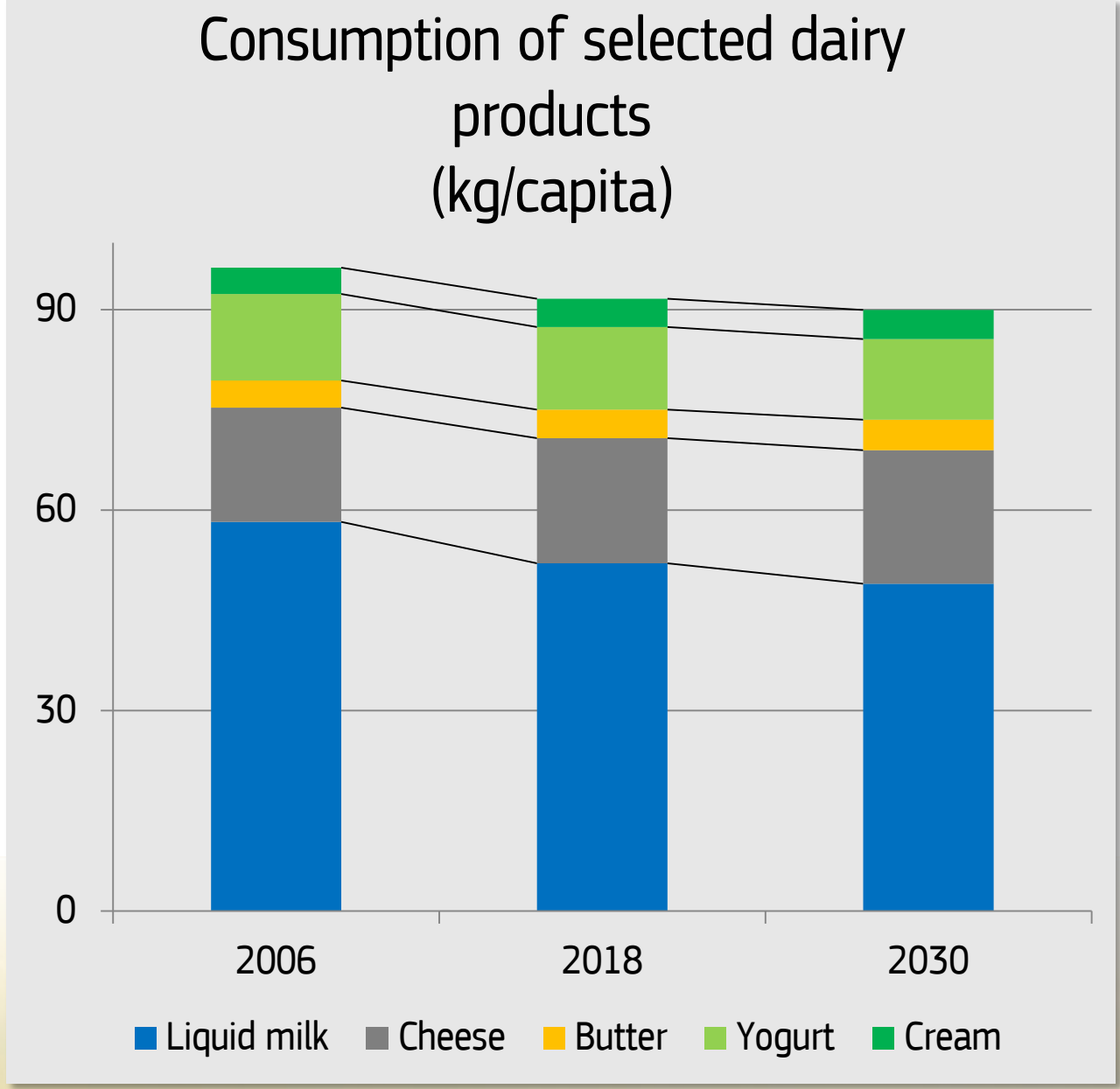


Source: DG Agriculture and Rural Development, based on Euromonitor



# But actual impact on total consumption still small

Lower meat consumption but higher EU domestic use of dairy products



- **smoothened** decline in **liquid milk** consumption
- use of **cheese** keeps **growing**
- + 0.9 million t of milk domestically used yearly



- dependent on **availabilities**
- shift towards **more processed** meat
- **preference for quality** over quantity



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# Other challenges for the livestock sector

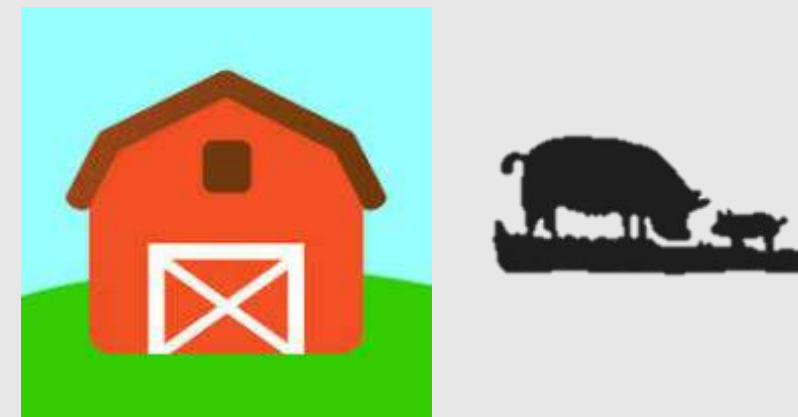
Sustainability requirements stimulate actions

To mitigate GHG emissions

To reduce ammonia emissions

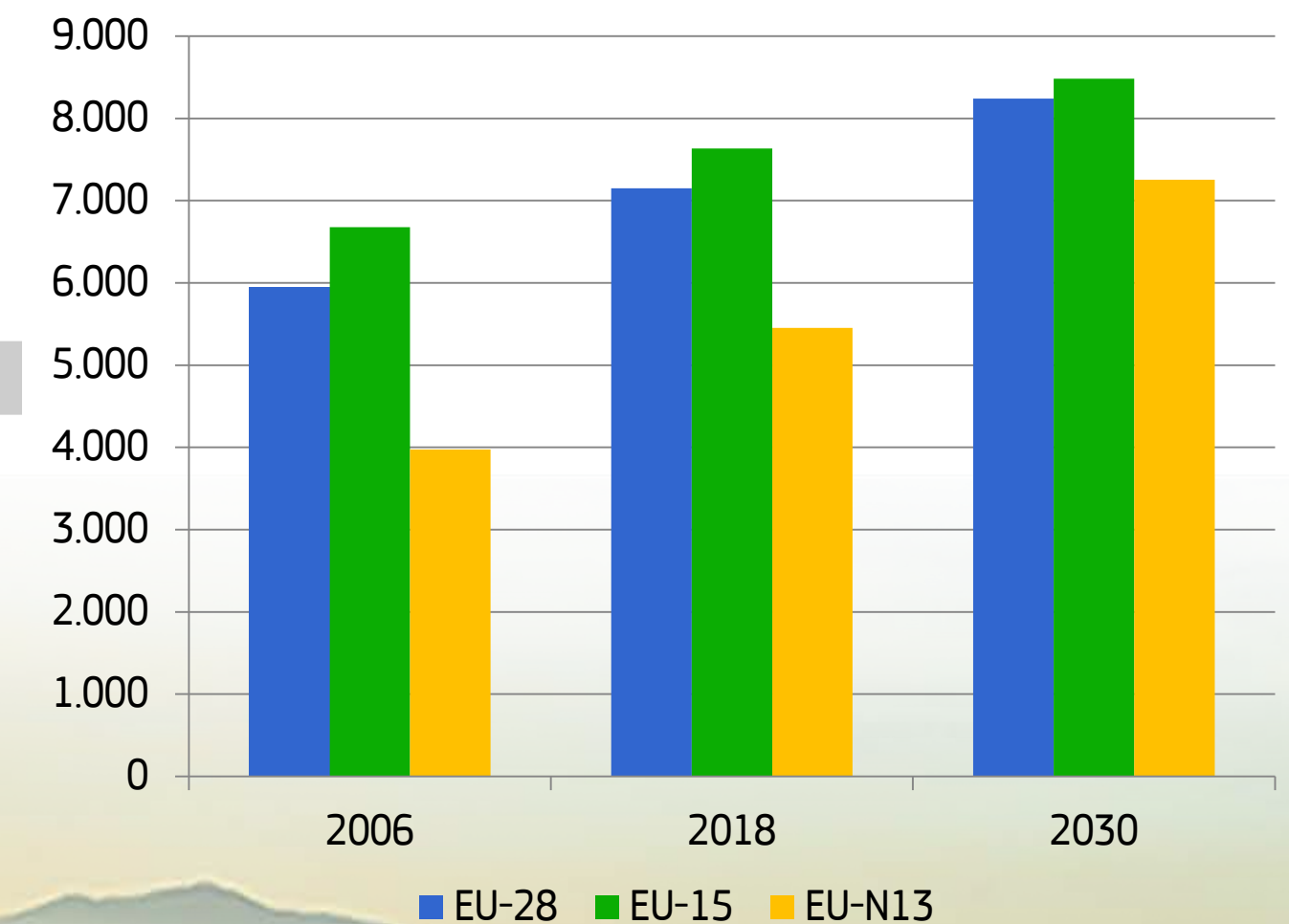
To reduce nitrogen leakage and phosphates

... and impact production (de)localisation



and stimulate efficiency increase

Cow's milk yield (kg/cow)



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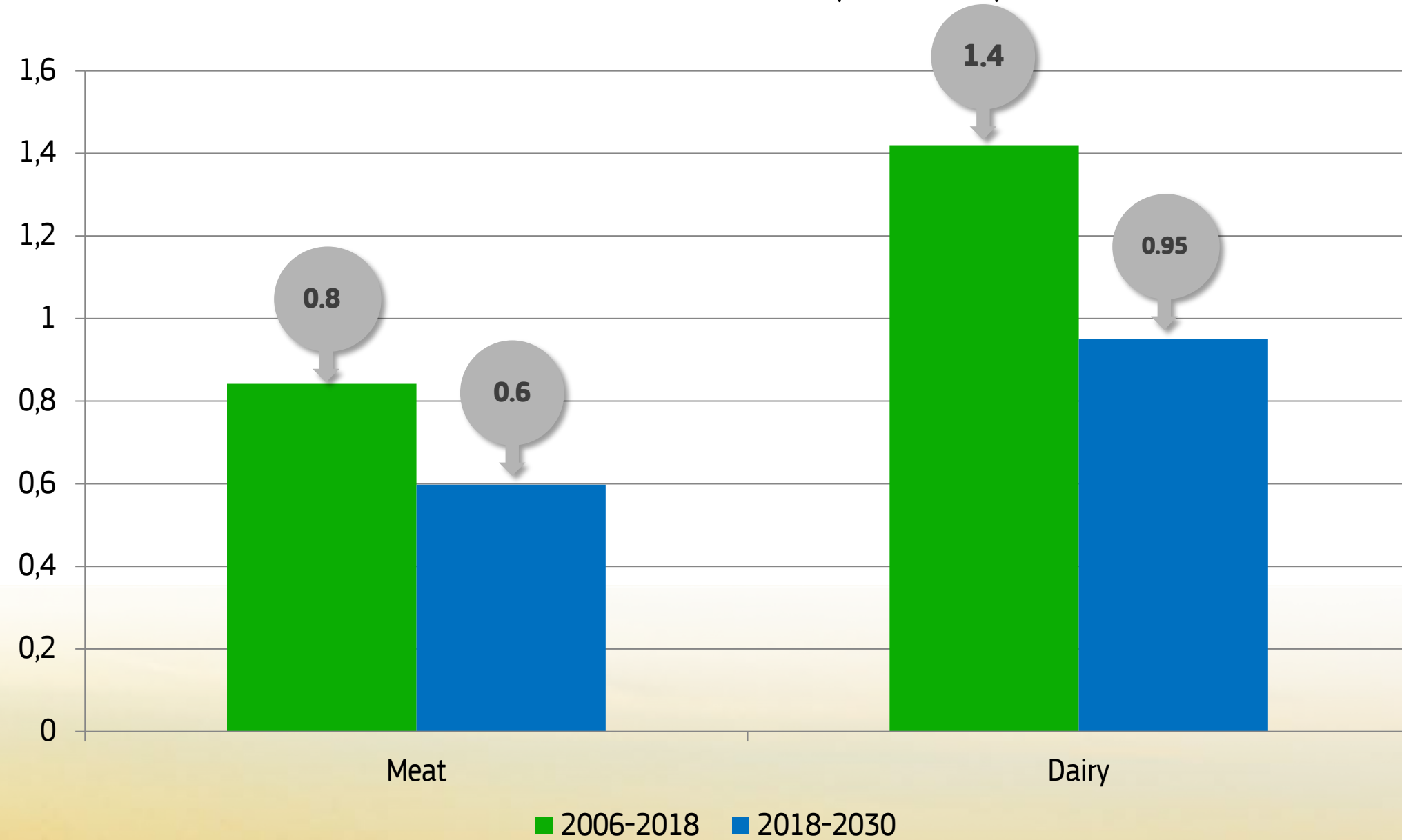
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# Global trade expansion but lower

EU leading position on world pigmeat and dairy products market

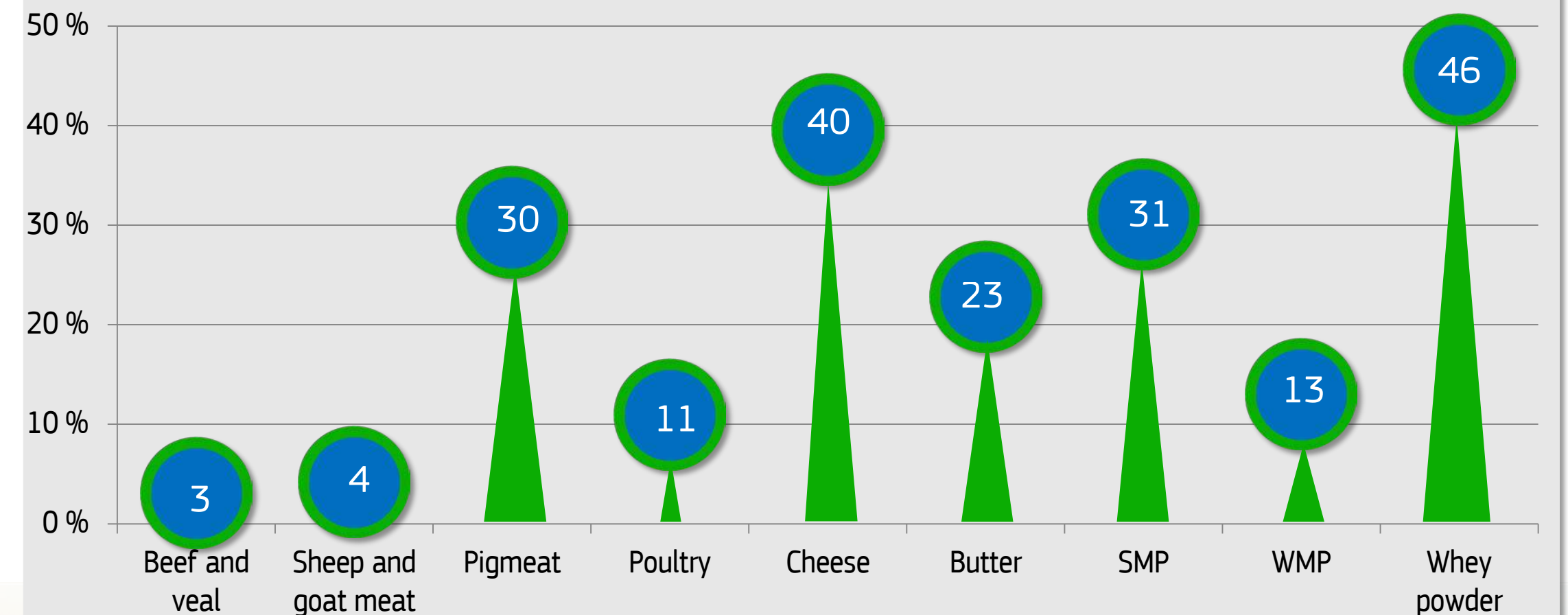
Average annual increase in meat and dairy global import demand 2018 - 2030 (million t)



beef and poultry meat

milk powders and cheese

Share of EU on world exports in 2030 (%)



Value added products  
 Technical ingredients  
 Adoption of Western cuisine



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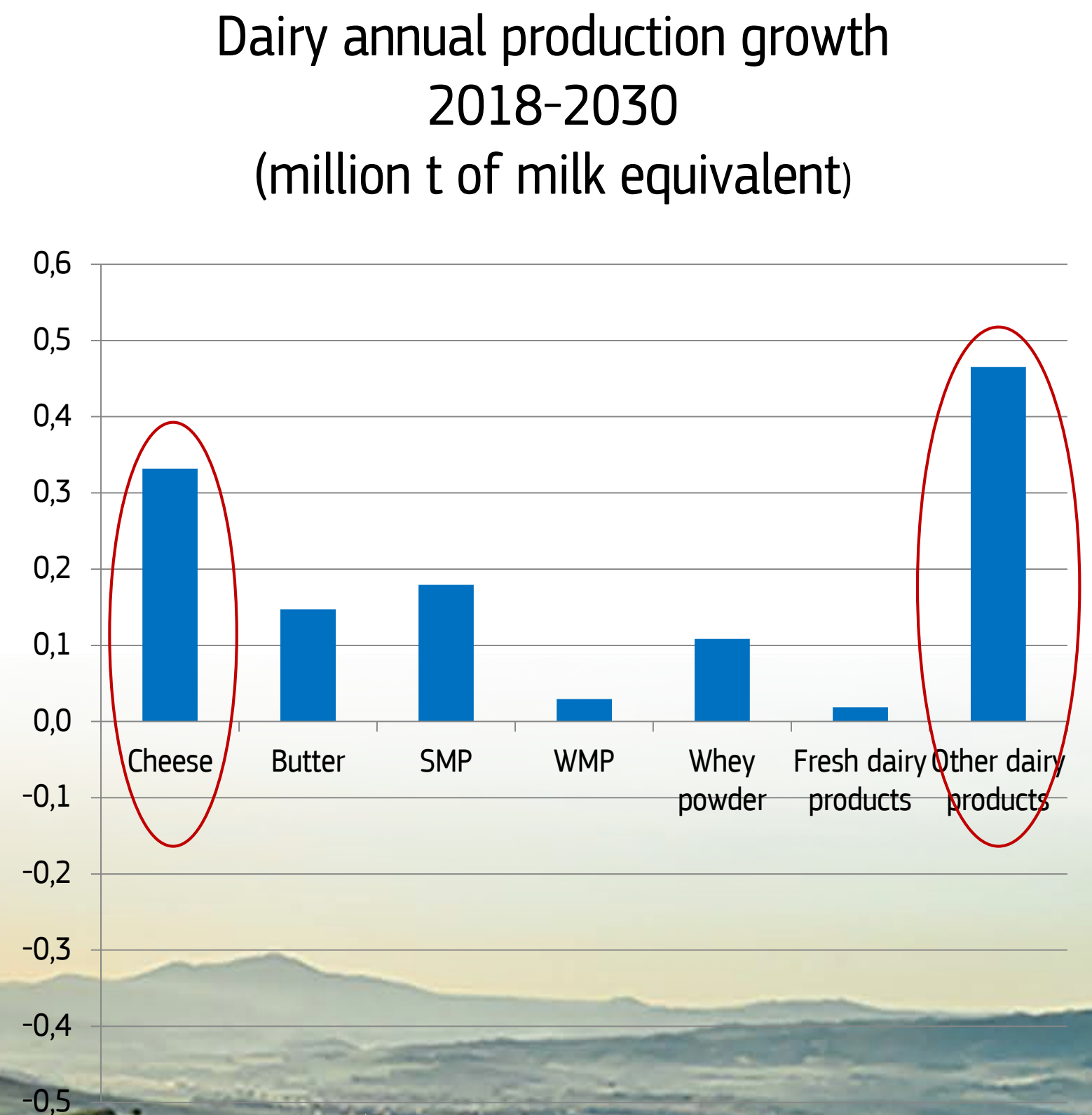
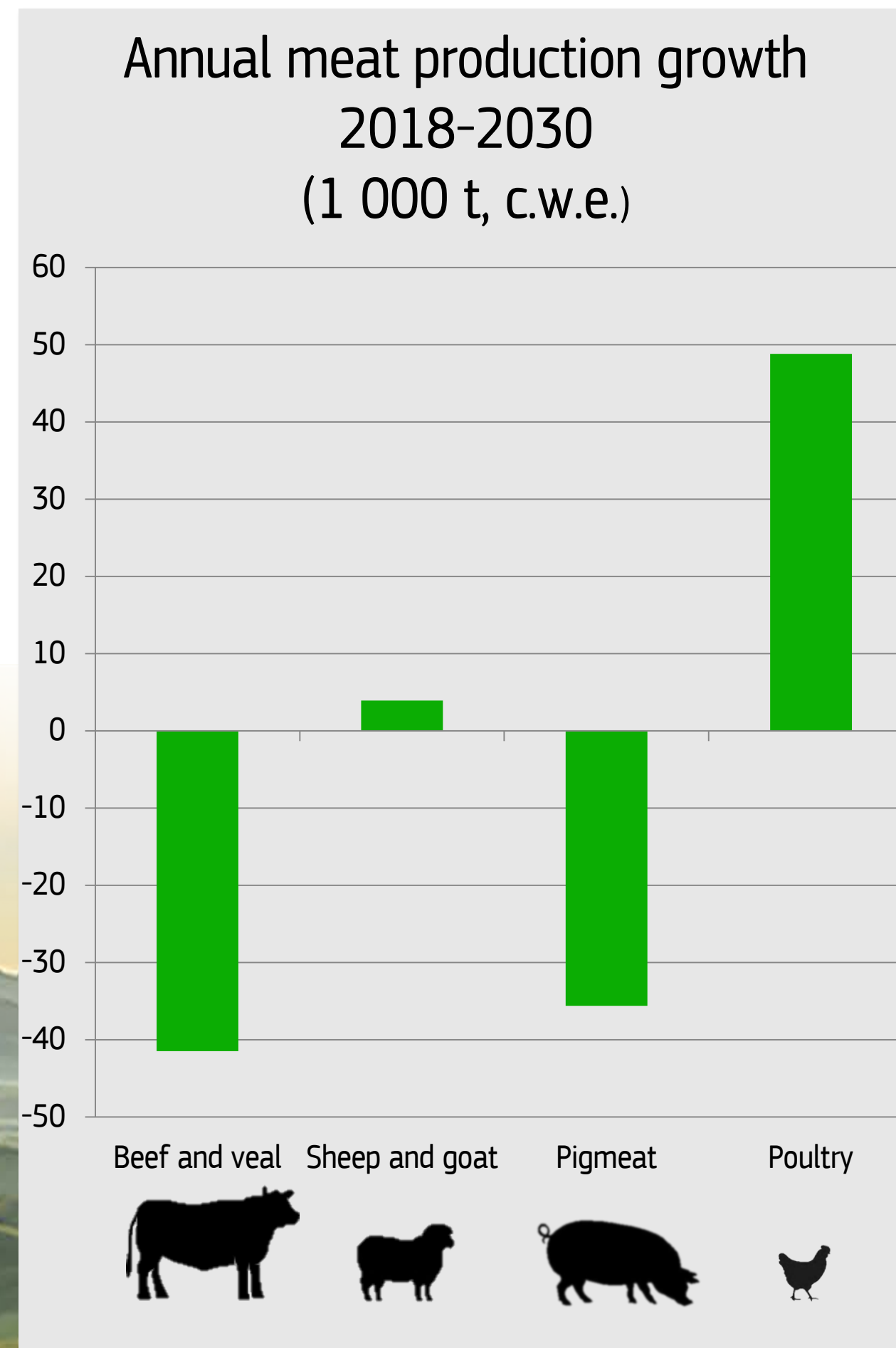
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# Lower production growth expected

Less beef and pigmeat, more milk and poultry

- modest increase in milk production  
**+ 16 Mt to 182 million t**  
in 12 years
- meat production slightly declining  
**- 0.3 Mt to 48 million t c.w.e.**  
in 12 years



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# Challenges can become opportunities

Focusing on differentiated products and value creation

Organic production

- 10% of **dairy** production in 2030
- more **complex** in **meat** sector



GM-free fed products



Locally-produced



Pasture-based products



Lait de territoires où les vaches pâturent en moyenne 150 jours par an

