European Commission

Last update : 19.06.2017

Meat MO Economic Board

13 June 2017

- The 4th meeting of the Economic Board of the Meat Market Observatory (Meat MO) took place on 13 June 2017, with the participation of experts from the various steps in the meat supply chain.
- DG AGRI services provided a presentation concerning data sourcing for improved market transparency (see Annex VI). The Group exchanged views on the use of the evolution of unit value for beef and pigmeat products subject to intra-EU exchanges in this sense.
- DG AGRI services provided as well a presentation on ongoing information and promotion programmes for meat, as well as the promotion work programme for 2017 (See Annex VIII).
- The exchange of views on the beef and veal and pigmeat market situation was based on factual presentations by DG AGRI (see Annexes I and II).
- For pigmeat, the discussions showed that the sector is currently benefitting from high prices. Good export performance contributed to producers' price recovery and a re-balancing of the market. Low feed and production costs had also a positive impact on the sector.
- Nevertheless, the sector is concerned by its high dependence on exports to China. Moreover, the competiveness of the sector is eroding on export markets due to current high prices, vis-à-vis prices in the main competitors.
- For beef and veal, discussions showed that the EU beef market regained its balance.
- Positive aspects are relatively low feed costs and good export performance. Exports of live bovines are essential for the internal market balance.
- Brexit and the impact of FTAs remain matters of major concern for both sectors.
- UECBV provided a presentation on a newly developed index to monitor prices of pork cuts on a weekly basis (See Annex VII). Views were exchanged on the usefulness of such an index given the limitations of such an exercise.
- ECVC provided a presentation on the Belgian supply chain agreement for the pig sector reached in August 2015 when the pig market was in difficulties (See Annex V).
- Eurocommerce provided a presentation (See Annex IV) on trends in sales of meat products from a retail perspective.
- The next meeting of the Meat MO Economic Board is scheduled for 3 October 2017.

Annex I

European Commission

BEEF & VEAL MARKET SITUATION

Meat Market Observatory

13 June 2017

Agriculture and Rural Development

LIVESTOCK

EU EVOLUTION
TOTAL BOVINE

DECEMBER SURVEY

European Commission

Dec	TOTAL LIVESTOCK				%Var 2016 2015	BOVINE < 1 Year				%Var 2016 2015	BOVINE 1-2 Year				%Var 2016 2015	BOVINE > 2 Year				%Var 2016 2015
1000 Hd	2013	2014	2015	2016		2013	2014	2015	2016		2013	2014	2015	2016		2013	2014	2015	2016	
BE	2 441	2 477	2 503	2 499	-0.2%	718	745	749	748	-0.1%	490	490	493	491	-0.4%	1 234	1 243	1 261	1 259	-0.2%
BG	586	562	561	571	+1.8%	150	121	109	120	+10.2%	62	65	64	63	-1.0%	374	376	388	388	-0.0%
CZ	1 332	1 373	1 366	1 340	-2.0%	390	413	403	397	-1.6%	300	311	309	295	-4.6%	642	649	654	648	-0.9%
DK	1 583	1 553	1 566	1 554	-0.8%	528	534	538	540	+0.4%	319	307	302	298	-1.3%	736	713	726	715	-1.5%
DE	12 686	12 742	12 635	12 467	-1.3%	3 878	3 909	3 836	3 795	-1.1%	3 015	3 011	2 993	2 960	-1.1%	5 793	5 823	5 806	5 712	-1.6%
EE	261	265	256	249	-3.0%	71	73	70	68	-3.6%	54	54	53	50	-4.6%	137	138	133	131	-2.1%
IE	6 309	6 243	6 422	6 613	+3.0%	1 893	1 886	2 026	2 077	+2.5%	1 714	1 649	1 660	1 778	+7.1%	2 701	2 709	2 737	2 759	+0.8%
EL	653	659	582	580	-0.3%	167	176	154	151	-1.9%	129	119	103	107	+3.9%	357	365	325	324	-0.3%
ES	5 802	6 079	6 183	6 255	+1.2%	2 068	2 302	2 325	2 360	+1.5%	735	746	786	795	+1.1%	2 999	3 031	3 072	3 099	+0.9%
FR	19 129	19 271	19 406	19 004	-2.1%	5 453	5 546	5 618	5 138	-8.5%	3 441	3 418	3 461	3 493	+0.9%	10 235	10 307	10 327	10 372	+0.4%
HR	442	441	455	462	+1.5%	145	132	148	154	+4.1%	92	88	88	89	+1.1%	205	221	219	219	idem
IT	6 249	6 125	6 156	6 315	+2.6%	1 680	1 654	1 678	1 745	+4.0%	1 457	1 366	1 379	1 448	+5.0%	3 112	3 106	3 099	3 122	+0.7%
CY	57	60	59			21	22	21			9	10	9			27	28	29		
LV	406	422	419	412	-1.6%	109	118	114	113	-0.5%	75	75	76	73	-4.8%	222	229	229	227	-1.1%
LT	714	737	723	695	-3.9%	187	192	185	179	-3.2%	144	149	152	142	-6.3%	383	395	385	373	-3.2%
LU	198	201	201	202	+0.9%	55	54	54	54	+1.2%	45	47	45	44	-0.5%	98	100	102	104	+1.3%
HU	782	802	821	838	+2.1%	212	219	220	232	+5.5%	179	176	180	173	-3.9%	393	407	421	434	+3.1%
MT	15	15	15	14	-4.4%	4	4	4	4	-6.9%	4	3	4	3	-12.6%	7	7	7	7	+1.2%
NL	4 090	4 169	4 315	4 294	-0.5%	1 653	1 676	1 707	1 666	-2.4%	627	657	660	644	-2.4%	1 810	1 836	1 948	1 985	+1.9%
AT	1 958	1 961	1 958	1 954	-0.2%	627	629	624	632	+1.2%	435	432	439	432	-1.6%	897	899	894	890	-0.4%
PL	5 590	5 660	5 763	5 985	+3.9%	1 409	1 450	1 617	1 718	+6.2%	1 372	1 445	1 532	1 637	+6.9%	2 809	2 765	2 614	2 630	+0.6%
PT	1 471	1 549	1 606	1 635	+1.8%	425	487	510	499	-2.1%	211	214	240	267	+11.0%	834	848	856	869	+1.6%
RO	2 022	2 069	2 092	2 058	-1.7%	454	463	475	466	-1.9%	238	254	261	257	-1.8%	1 331	1 352	1 357	1 335	-1.6%
SI	461	468	484	489	+1.0%	144	148	153	155	+1.7%	123	122	129	131	+1.1%	194	198	202	203	+0.3%
SK	468	466	457	449	-1.7%	133	130	130	131	+1.0%	98	93	91	85	-6.4%	238	243	236	233	-1.3%
FI	903	907	903	887	-1.8%	302	307	308	302	-1.9%	224	223	221	218	-1.3%	378	378	374	367	-2.0%
SE	1 444	1 436	1 428	1 436	+0.5%	469	473	467	468	+0.2%	342	334	342	344	+0.6%	632	629	619	624	+0.8%
UK	9 682	9 693	9 816	9 942	+1.3%	2 803	2 842	2 967	3 046	+2.7%	2 411	2 332	2 372	2 468	+4.0%	4 468	4 520	4 477	4 429	-1.1%
EU	87 734	88 406	89 152	89 199	+0.1%	26 148	26 705	27 209	26 958	-0.8%	18 342	18 189	18 445	18 786	+1.9%	43 246	43 514	43 498	43 458	-0.0%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2015 AND 2016

16 June 2017

Agriculture and Rural Development

LIVESTOCK

EU EVOLUTION

COWS

DECEMBER SURVEY

European Commission

Dec 1000 Hd	TOTAL COWS 2013	2014	2015	2016	%Var 2016 2015	DAIRY COWS 2013	2014	2015	2016	%Var 2016 2015	OTHER COWS 2013	2014	2015	2016	%Var 2016 2015
BE	945	956	974	987	+1.3%	516	519	529	530	+0.2%	429	436	445	457	+2.6%
BG	353	351	359	365	+1.7%	313	302	283	280	-1.2%	40	49	76	86	+12.4%
CZ	553	566	566	561	-1.0%	375	372	369	367	-0.5%	178	194	197	193	-1.9%
DK	664	643	664	657	-1.1%	567	547	570	565	-0.9%	97	96	94	92	-2.1%
DE	4 941	4 969	4 966	4 887	-1.6%	4 268	4 296	4 285	4 218	-1.6%	673	674	681	670	-1.7%
EE	118	118	116	114	-1.4%	98	96	91	86	-4.7%	20	23	25	28	+10.8%
IE	2 168	2 169	2 293	2 337	+1.9%	1 082	1 128	1 240	1 295	+4.5%	1 085	1 041	1 053	1 042	-1.1%
EL	289	305	274	269	-1.8%	130	135	111	113	+1.8%	159	169	163	156	-4.3%
ES	2 633	2 669	2 763	2 780	+0.6%	844	845	844	820	-2.9%	1 789	1 824	1 919	1 960	+2.2%
FR	7 804	7 841	7 872	7 856	-0.2%	3 697	3 699	3 661	3 630	-0.8%	4 106	4 142	4 211	4 225	+0.3%
HR	181	180	171	167	-2.3%	168	159	152	147	-3.3%	13	21	19	20	+5.3%
IT	2 410	2 398	2 386	2 365	-0.9%	2 075	2 069	2 057	2 060	+0.2%	335	329	329	305	-7.5%
CY	25	25	26			25	25	26			0	0	0		
LV	194	200	201	199	-1.3%	165	166	162	154	-5.2%	29	34	39	45	+15.0%
LT	345	351	343	333	-2.9%	316	314	301	286	-4.9%	29	37	43	47	+11.0%
LU	78	75	77	80	+3.2%	48	47	49	52	+5.8%	30	29	28	28	-1.3%
HU	345	359	368	379	+3.0%	250	255	251	242	-3.6%	96	104	117	137	+17.1%
MT	6	7	7	7	+1.7%	6	7	6	6	+2.0%	1	0	0	0	-11.5%
NL	1 683	1 694	1 802	1 864	+3.4%	1 597	1 610	1 717	1 794	+4.5%	86	84	85	70	-17.6%
AT	766	768	758	757	-0.3%	530	538	534	540	+1.1%	237	230	224	217	-3.4%
PL	2 442	2 403	2 303	2 334	+1.4%	2 299	2 248	2 134	2 161	+1.2%	143	155	169	174	+2.9%
PT	677	697	719	724	+0.7%	231	234	243	239	-1.8%	446	463	476	485	+1.9%
RO	1 187	1 207	1 207	1 189	-1.6%	1 169	1 188	1 191	1 173	-1.5%	18	18	17	16	-4.2%
SI	166	168	170	171	+0.9%	110	108	113	108	-4.4%	56	60	57	64	+11.4%
SK	199	202	200	195	-2.1%	145	143	139	133	-4.6%	54	59	60	62	+3.6%
FI	338	340	339	333	-1.9%	282	283	282	275	-2.4%	56	57	57	57	+0.5%
SE	522	517	513	514	+0.2%	346	344	337	326	-3.2%	175	173	176	188	+6.7%
UK	3 371	3 419	3 469	3 490	+0.6%	1 817	1 883	1 918	1 920	+0.1%	1 554	1 536	1 551	1 570	+1.2%
EU	35 401	35 596	35 907	35 913	+0.1%	23 468	23 559	23 595	23 519	-0.2%	11 934	12 037	12 312	12 393	+0.7%

16 June 2017

Source : EStat Newcronos

Agriculture and Rural Development

EU %Var is calculated considering only countries available in 2015 AND 2016

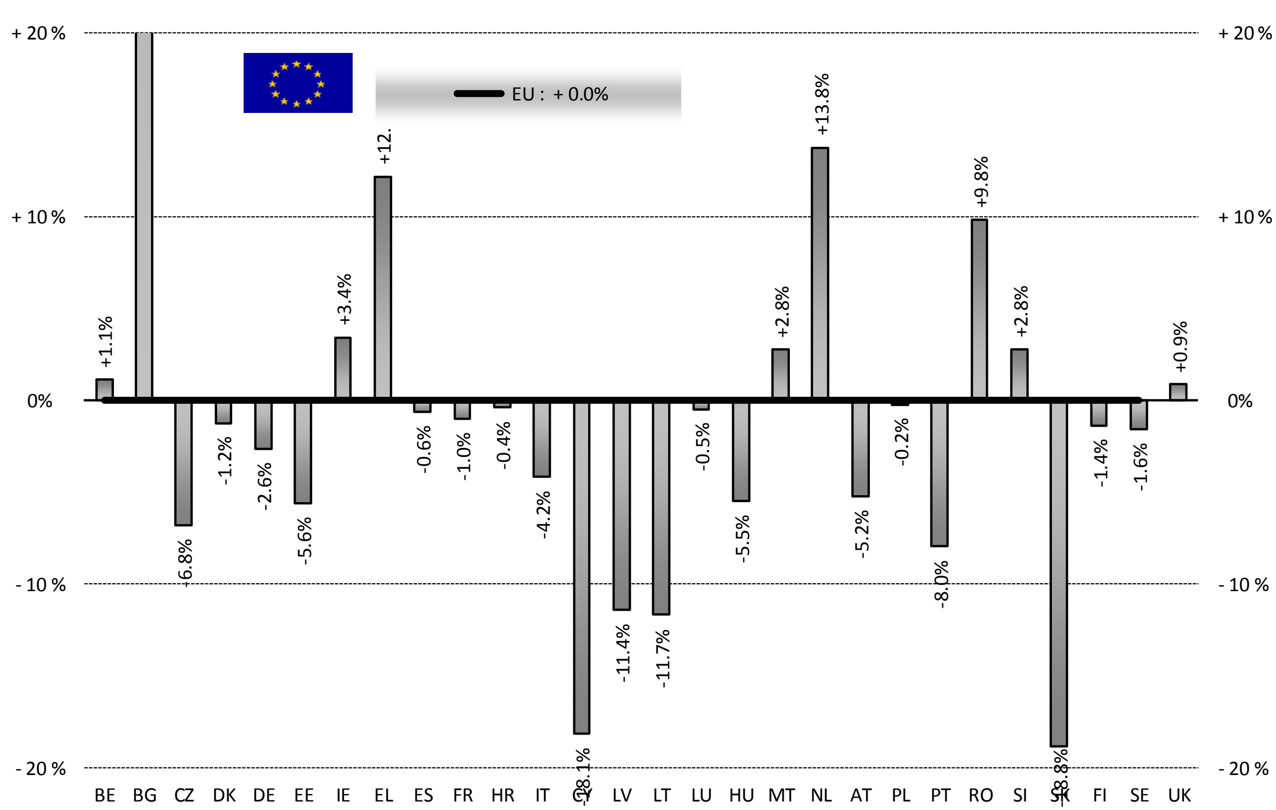
PRODUCTION

% EVOLUTION HEADS

European Commission

HEADS	Jan-Feb 16/17	
	EU15	EU28
Bull	-3.9%	-3.2%
Bullock	-0.1%	-0.2%
Cow	+1.5%	+0.9%
Heifer	-0.1%	+0.1%
Calve	+2.7%	+2.2%
Young cattle	+1.9%	+2.0%
Meat of bovine animals	+0.1%	+0.0%

Estimates for last month of period : UK



Source : EStat - Newcronos

16 June 2017

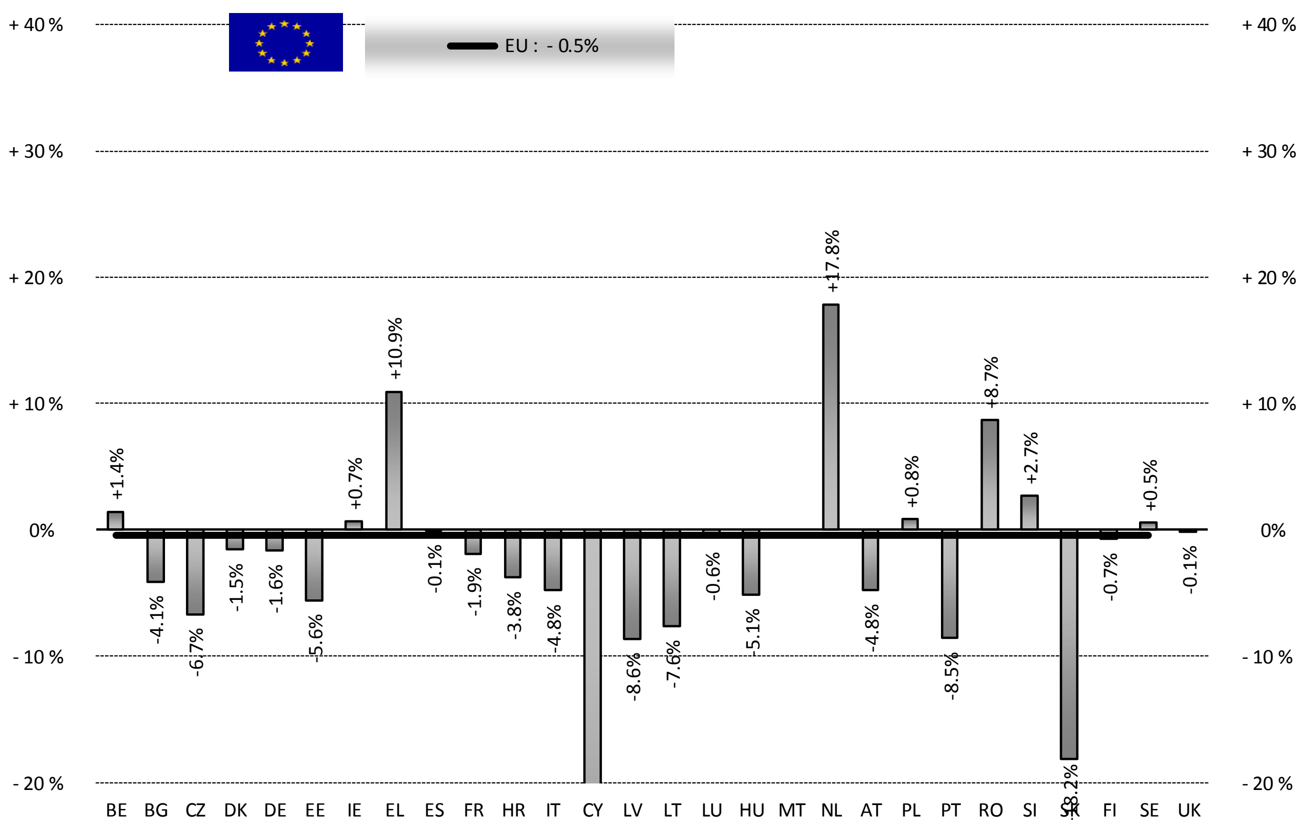
Agriculture and Rural Development

PRODUCTION

% EVOLUTION TONNES

European Commission

TONNES	Jan-Feb 16/17	
	EU15	EU28
Bull	-3.4%	-2.9%
Bullock	-1.6%	-1.7%
Cow	+0.5%	+0.1%
Heifer	+0.9%	+1.1%
Calve	+4.2%	+4.1%
Young cattle	+0.4%	+0.6%
Meat of bovine animals	-0.4%	-0.5%



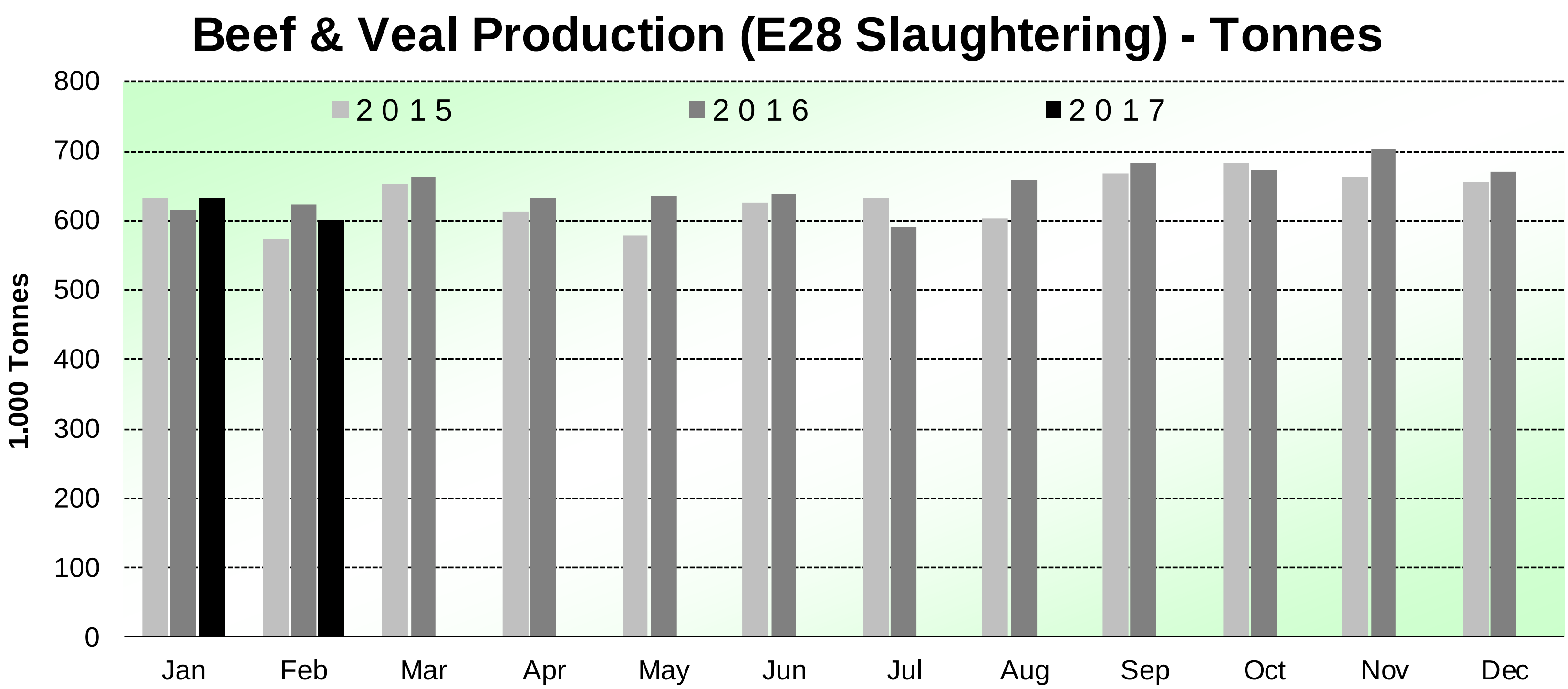
Estimates for last month of period : UK

Source : EStat - Newcronos

16 June 2017

Agriculture and Rural Development

European Commission



Source : EStat-Newcronos

16 June 2017

PRICES CARCASSES

Dashboard

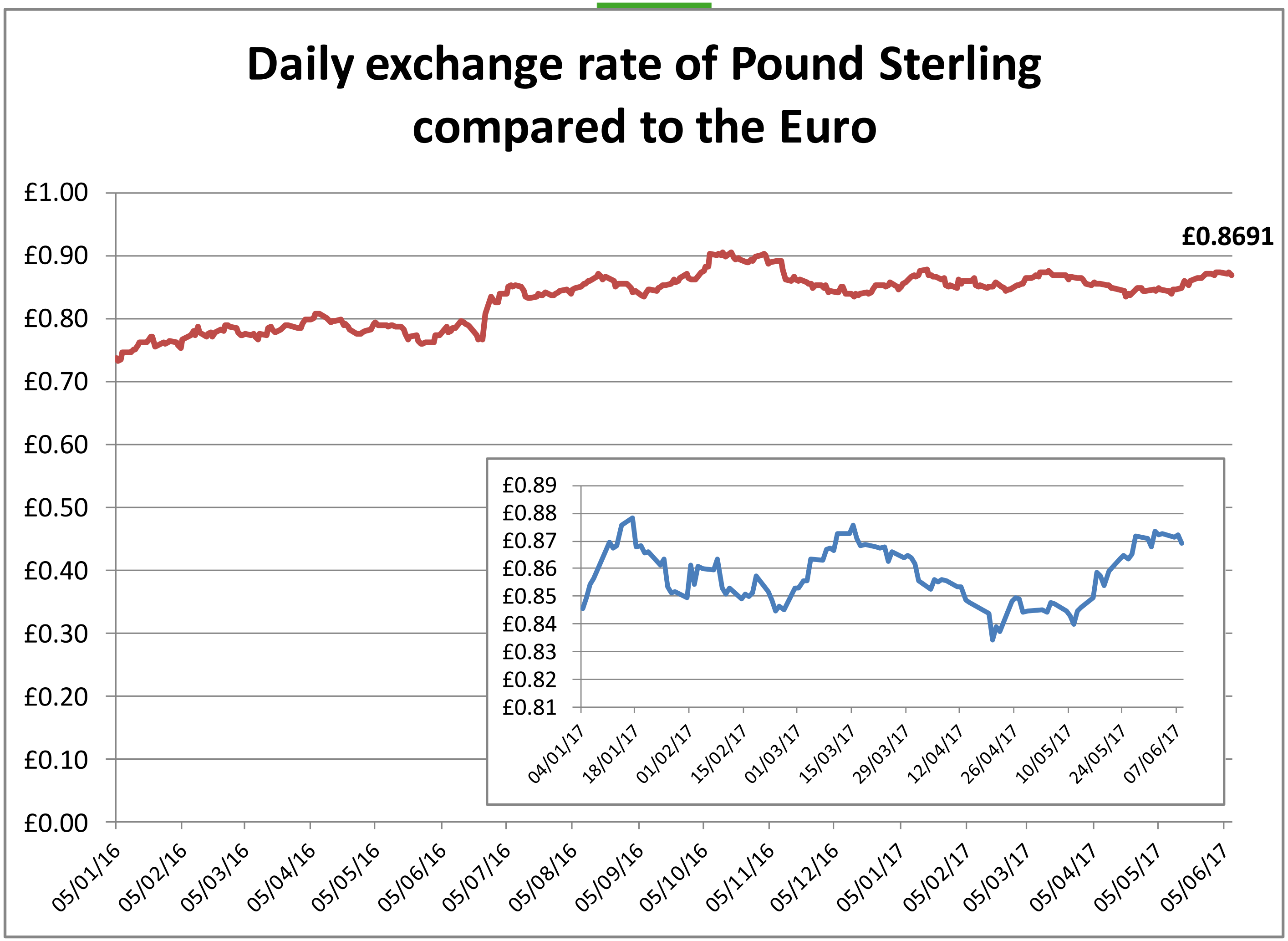
European Commission

EU Prices week	22		Evolution since last week	Evolution since last month	Evolution since last year
Carcasse					
Average A/C/Z -R3	372.	€/100 kg	+ 0.2%	- 0.4%	+ 2.5%
Young Bovines (Z)	387.	€/100 kg	+ 0.2%	+ 3.6%	+ 0.2%
Young Bulls (A)	365.	€/100 kg	+ 0.3%	- 0.4%	+ 3.0%
Steers (C)	412.0	€/100 kg	- 0.1%	+ 0.2%	+ 0.3%
Cows (D)	297.7	€/100 kg	+ 0.6%	+ 2.4%	+ 7.4%
Heifers (E)	389.5	€/100 kg	- 0.0%	+ 0.4%	+ 1.7%
Live Animals					
Male Calves Dairy Type	123.4	€/head	+ 1.4%	+ 9.8%	+ 5.2%
Male Calves Beef Type	234.6	€/head	+ 0.2%	+ 5.8%	+ 0.2%
Young Store Cattle	2.37	€/kg	- 2.0%	- 2.4%	- 0.1%
Yearling Male Store Cattle	2.28	€/kg	- 1.1%	- 2.2%	- 2.4%
Yearling Female Store Cattle	2.33	€/kg	- 0.4%	- 1.5%	+ 1.1%
Calves slaughtered <8M	500.	€/100	- 0.5%	- 1.6%	+ 1.7%

Sources : MSs notifications (Regulation (EC) 1249/2008 and 807/2013

16 June 2017

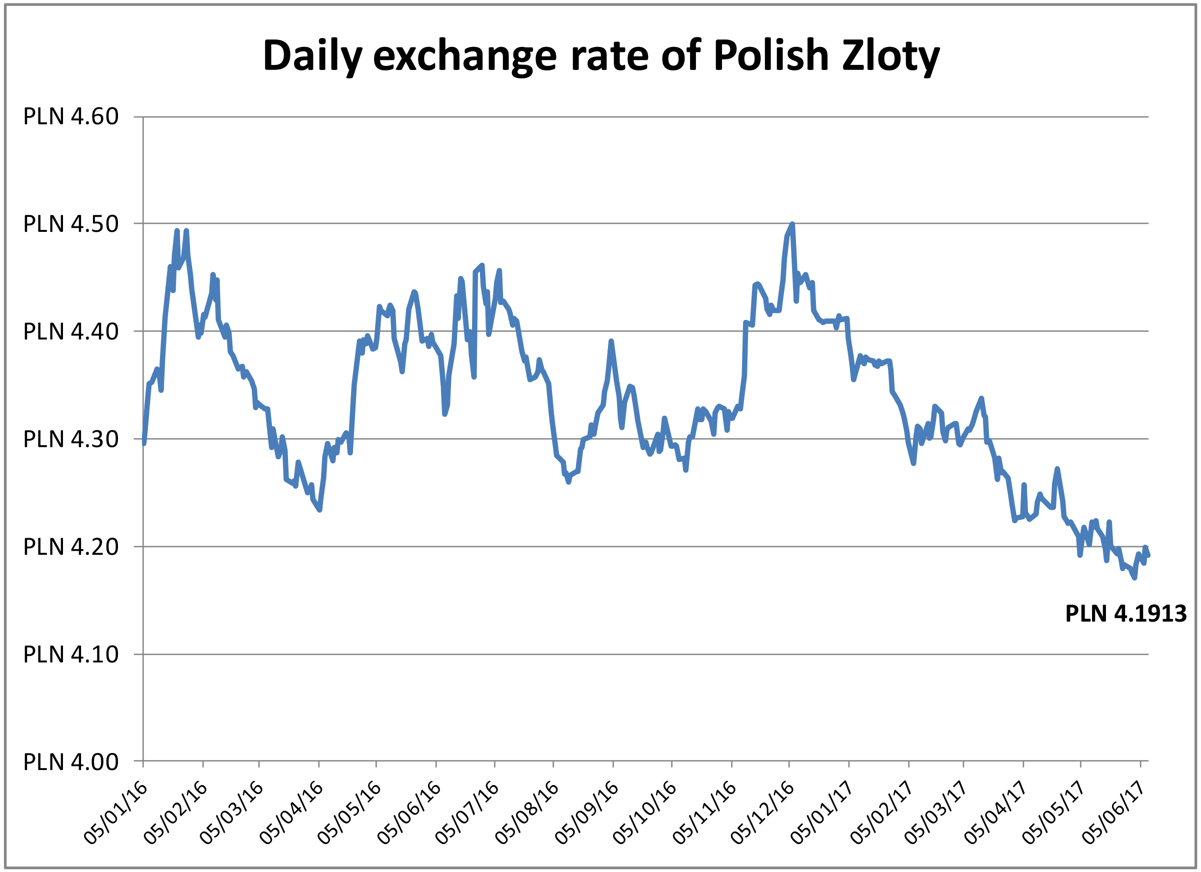
European Commission



16 June 2017

Source : ECB

European Commission

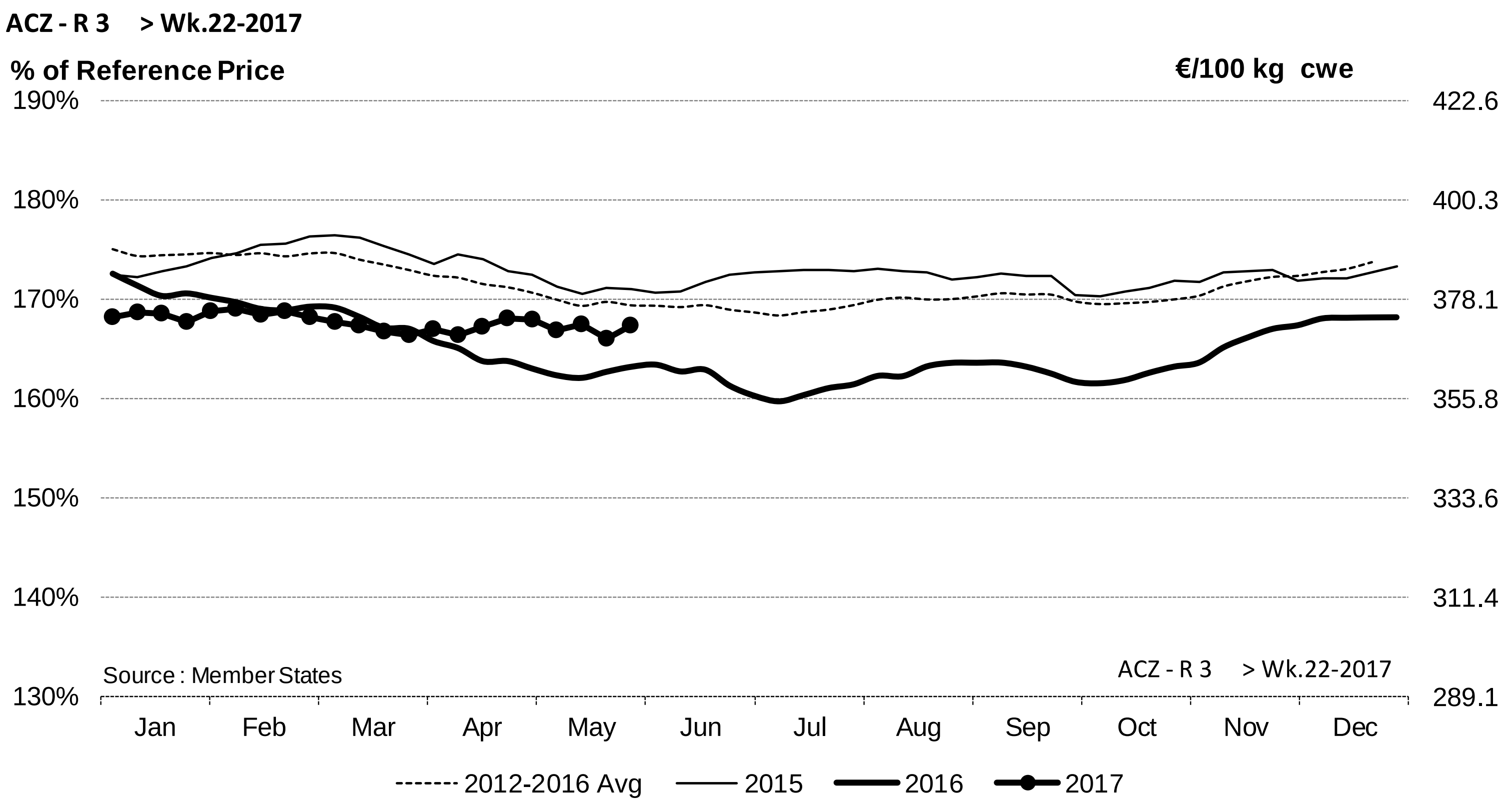


16 June 2017

PRICES CARCASSES

EU EVOLUTION A/C/Z.R3

European Commission



Price in week 22 :	**372.34**	Average price in May 2017 :	**371.73**
% change y/y :	**+ 2.6%**	% change y/y :	**+ 2.8%**
% Ref. Price in wk 22 :	**167.4%**		

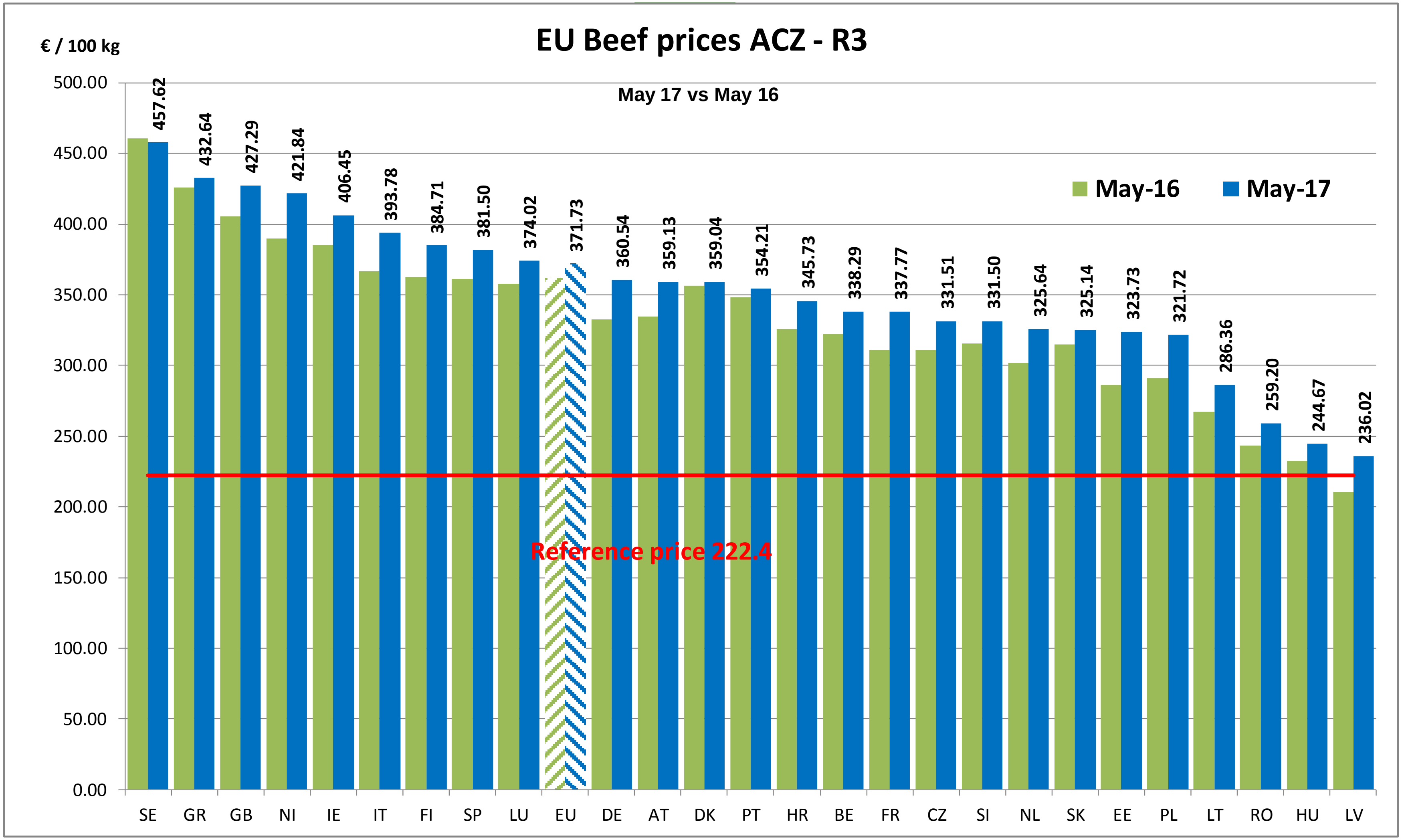
16 June 2017

Agriculture and Rural Development

PRICES CARCASSES

EU EVOLUTION A/C/Z.R3

European Commission



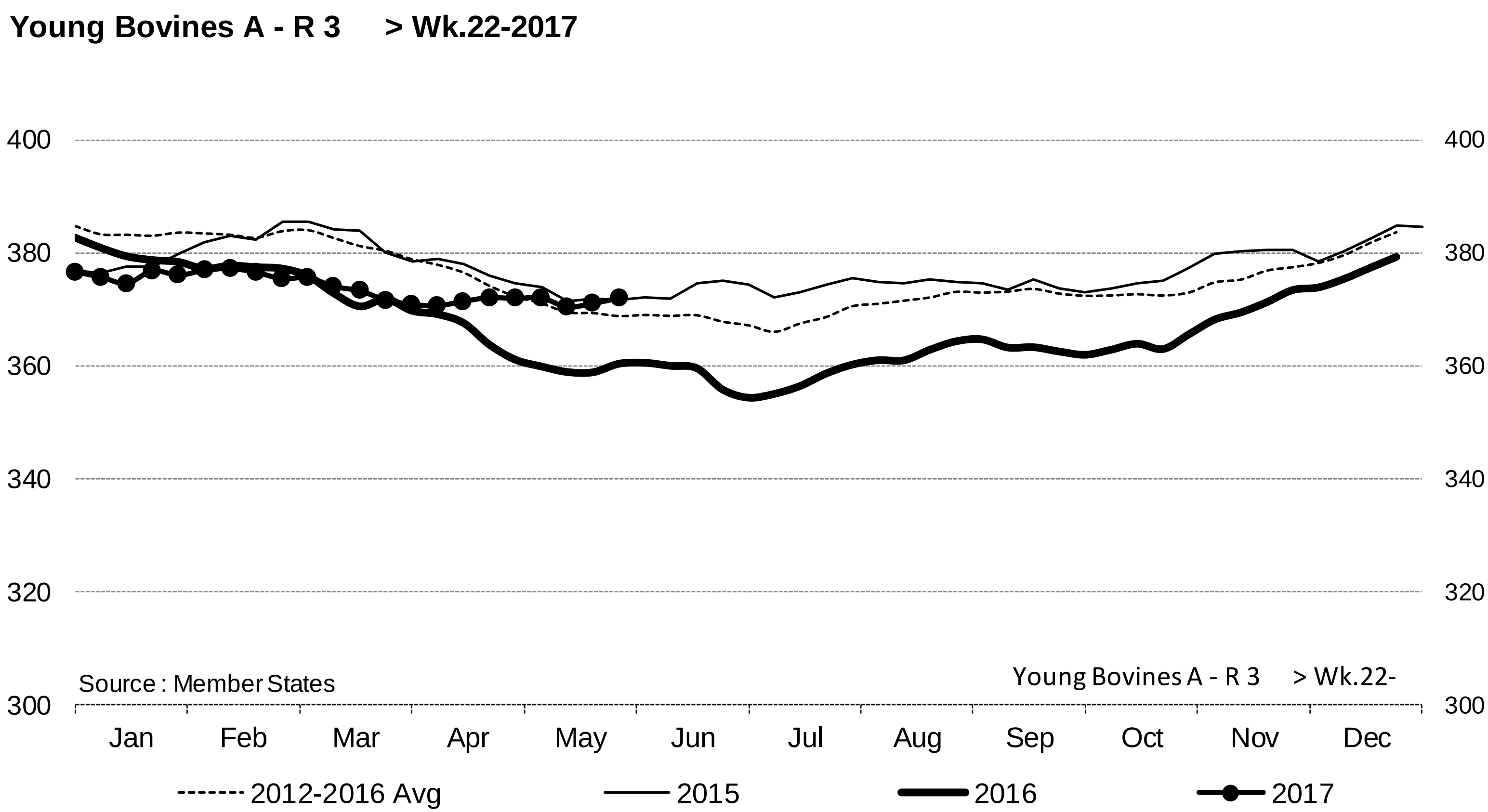
16 June 2017

Agriculture and Rural Development

PRICES CARCASSES

EU EVOLUTION YOUNG BULL – A.R3

European Commission



Price in week 22 : **372.00**
% change y/y : **+ 3.2%**

Average price in May 2017 : **371.42**
% change y/y : **+ 3.2%**

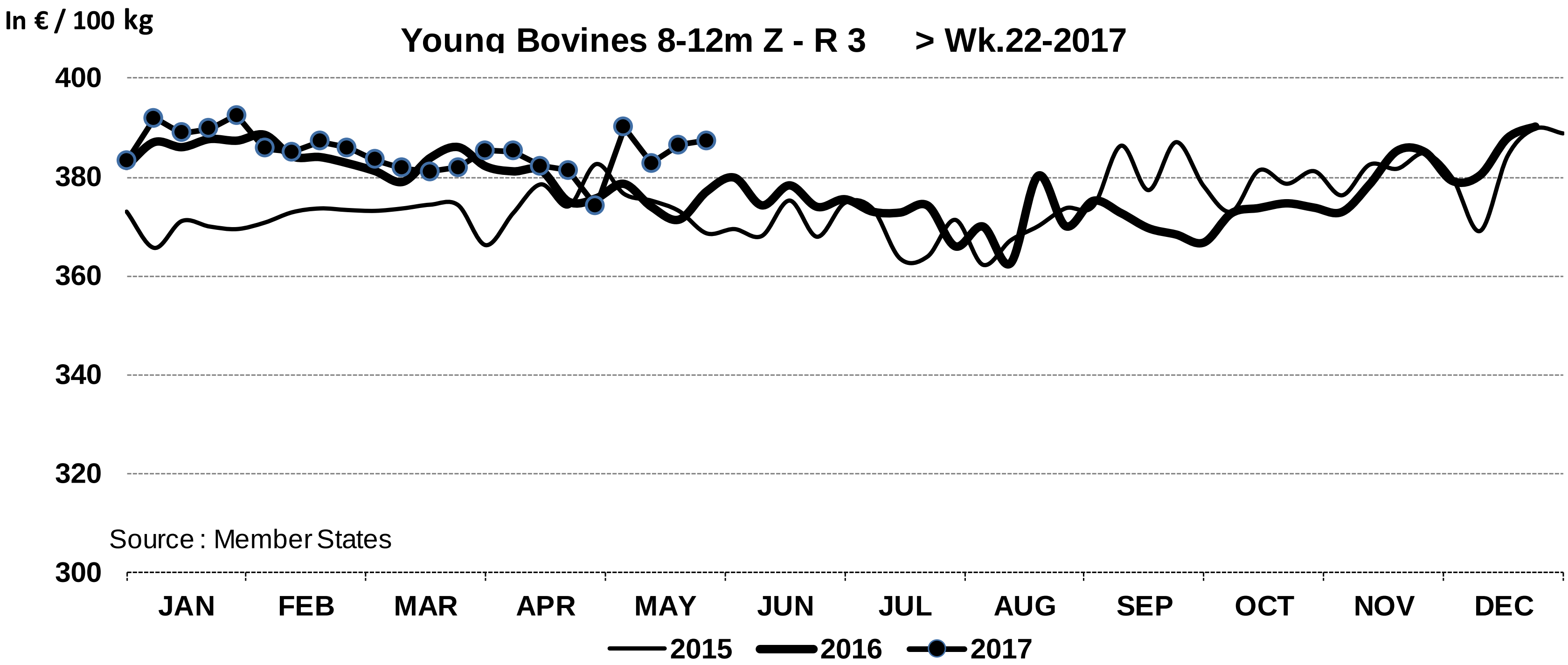
16 June 2017

Agriculture and Rural Development

PRICES CARCASSES

E.U. EVOLUTION YOUNG BOVINE 8-12M– Z.R3

European Commission



Price in week 22 :	**387.37**	Average price in May 2017 :	**383.73**
% change y/y :	**+ 2.7%**	% change y/y :	**+ 2.3%**

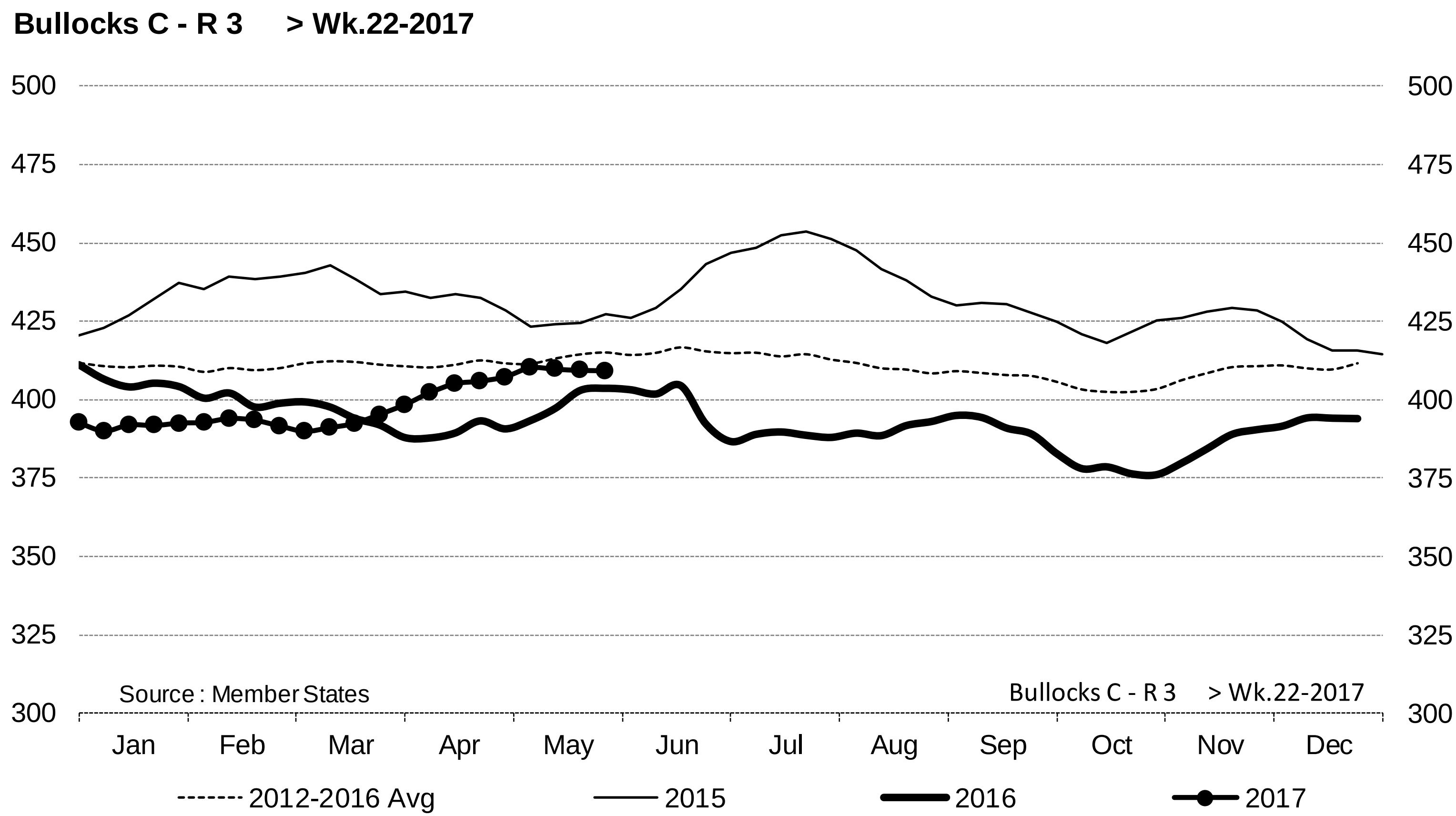
16 June 2017

Agriculture and Rural Development

PRICES CARCASSES

E.U. EVOLUTION STEER – C.R3

European Commission



Price in week 22 :	**409.23**	Average price in May 2017 :	**409.13**
% change y/y :	**+ 1.4%**	% change y/y :	**+ 3.2%**

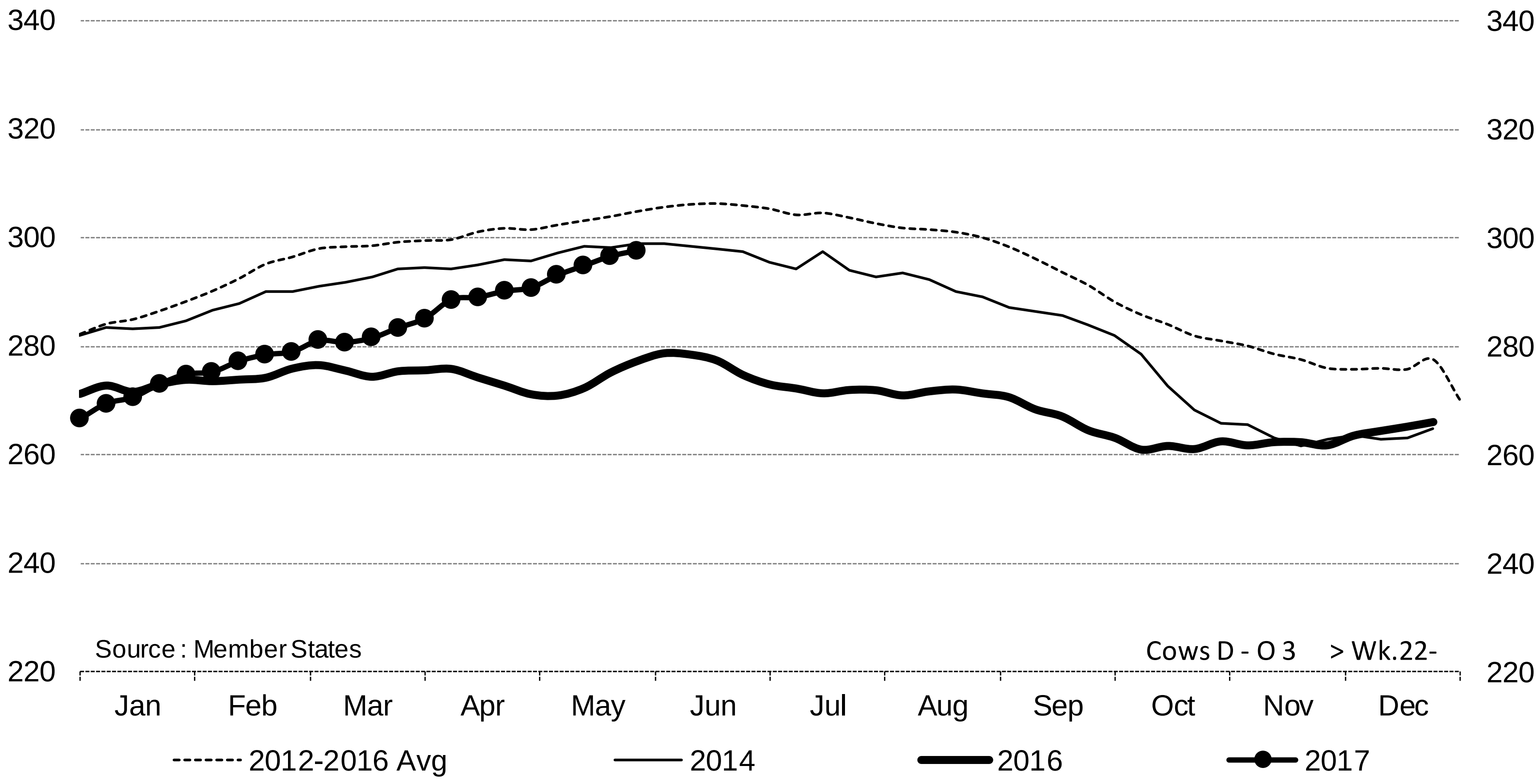
16 June 2017

PRICES CARCASSES

E.U. EVOLUTION COW – D.O3

European Commission

Cows D - O 3 > Wk.22-2017



Price in week 22 :	**297.72**	Average price in May 2017 :	**294.28**
% change y/y :	**+ 7.4%**	% change y/y :	**+ 7.9%**

16 June 2017

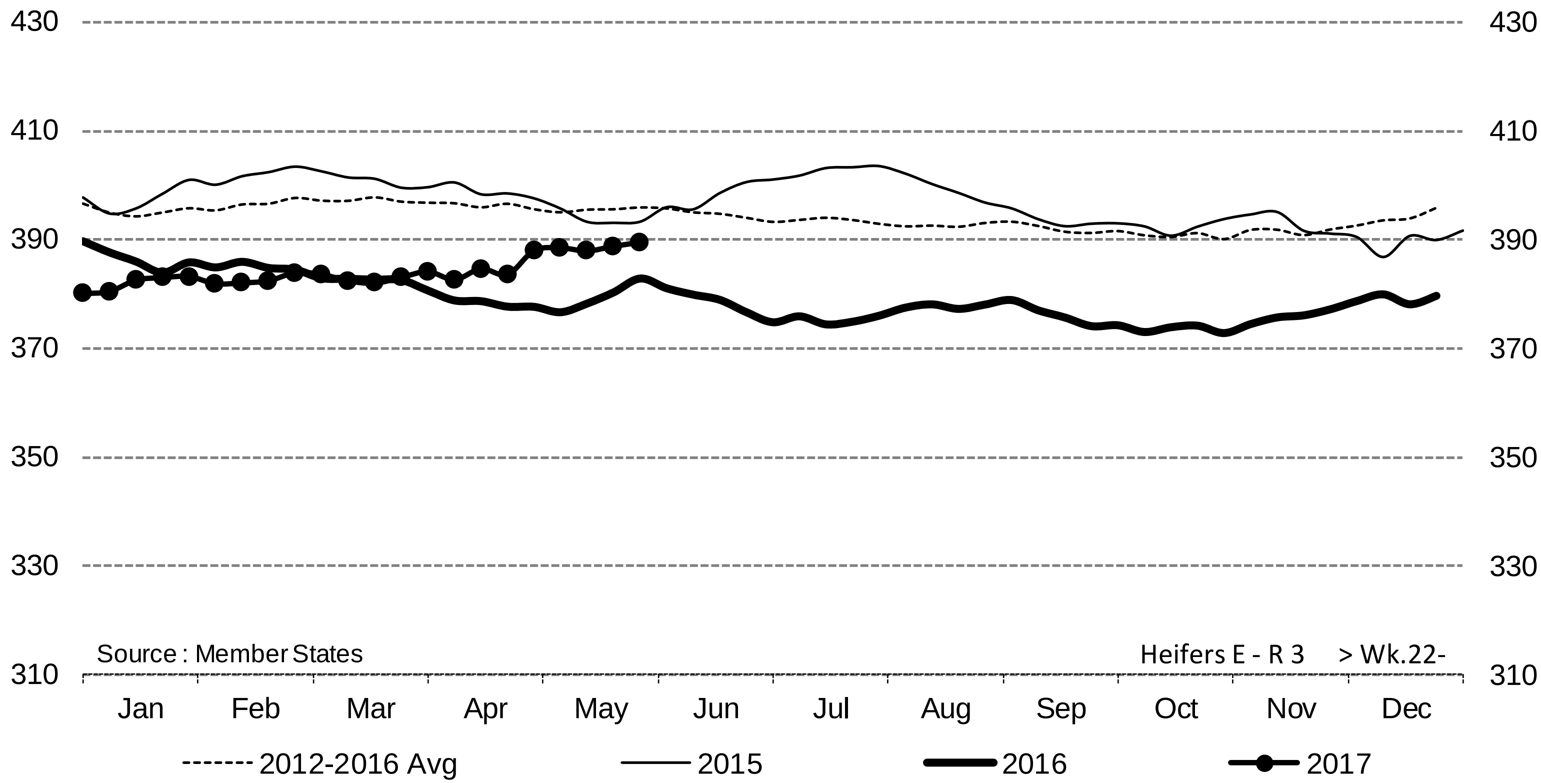
Agriculture and Rural Development

PRICES CARCASSES

EU EVOLUTION HEIFER – E.R3

European Commission

Heifers E - R 3 > Wk.22-2017



Price in week 22 :	**389.50**	Average price in May 2017 :	**388.40**
% change y/y :	**+ 1.7%**	% change y/y :	**+ 2.6%**

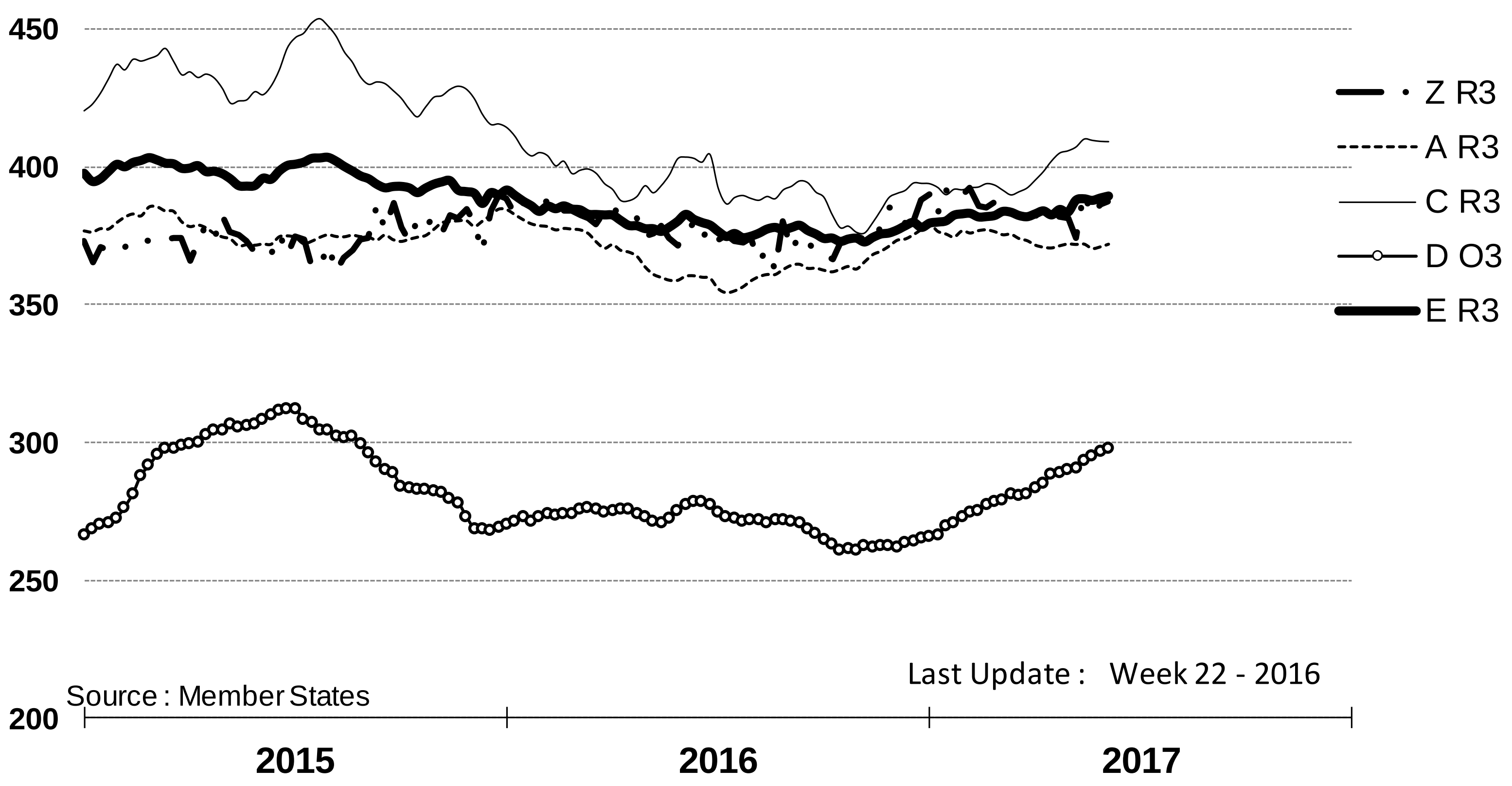
16 June 2017

Agriculture and Rural Development

PRICES
CARCASSES

EU EVOLUTION
All CAT GLOBAL VIEW

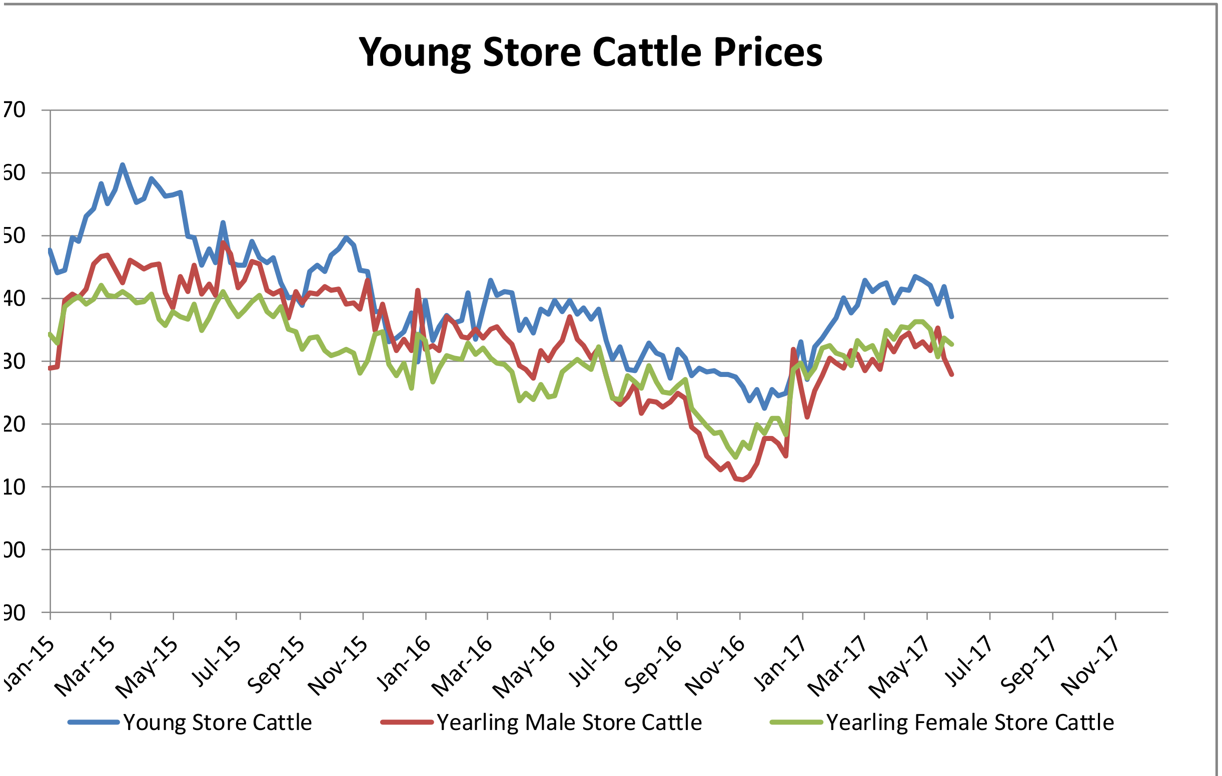
European Commission



16 June 2017

Agriculture and Rural Development

Store cattle (€/100 kg live weight)

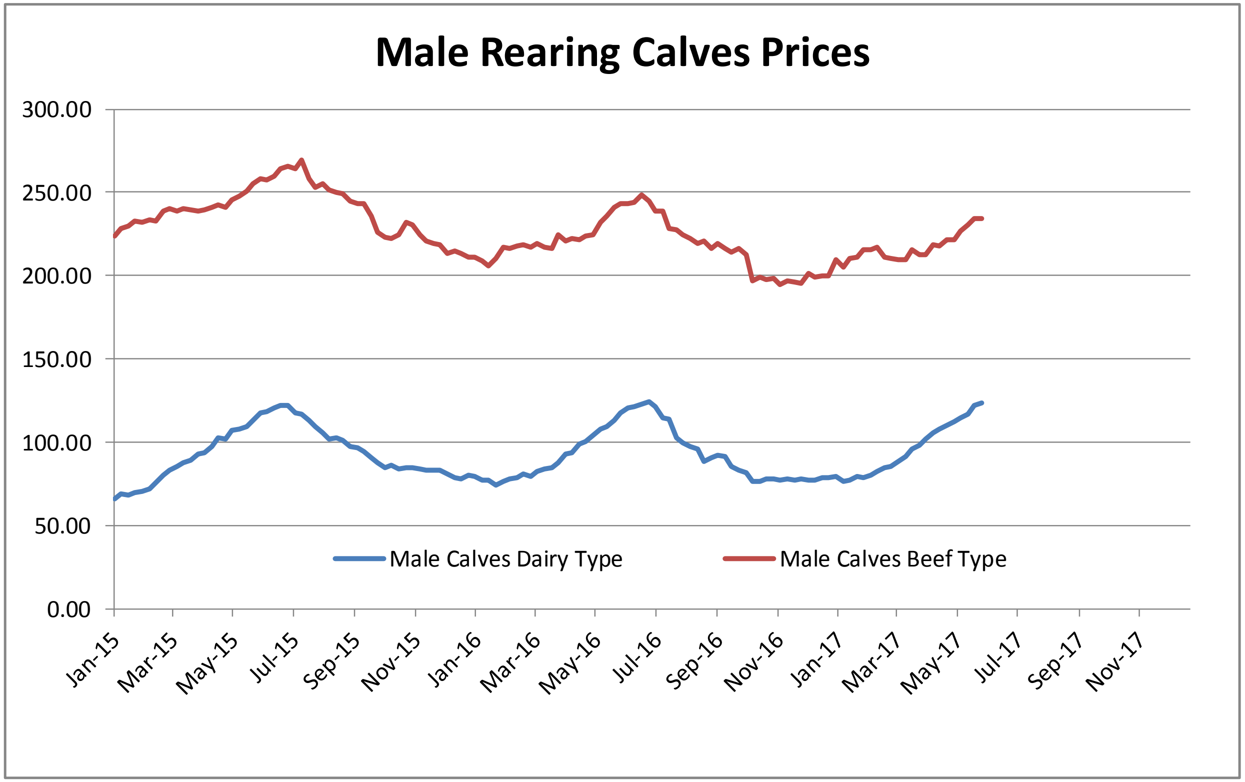


Young Store Cattle Price in	**Week 22**	**2.37**	**Yearling Male Store Cattle Price**		**2.28**
	Change y/y	-0.13%		Change y/y	-2.42%
Yearling Female Store Cattle Price		**2.33**			
	Change y/y	+1.11%			

16 June 2017

European Commission

Male calves aged between 8 days and 4 weeks (€/head)

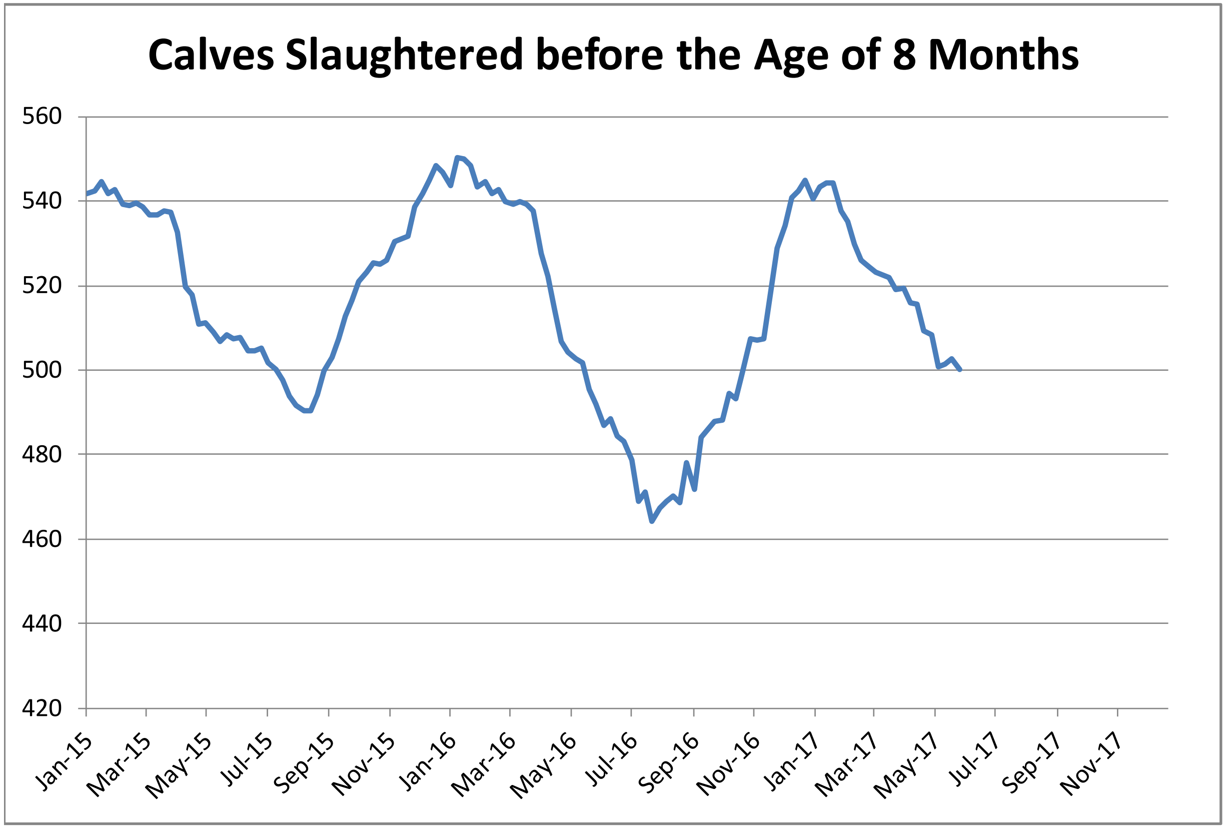


Male Rearing Calves Beef type			Male Rearing Calves Dairy type		
	Price in Week 22	234.63		Price in Week 22	123.46
	Change y/y	-3.63%		Change y/y	+5.18%

16 June 2017

European Commission

Calves slaughtered before the age of less than 8 months (€/100 kg cw)



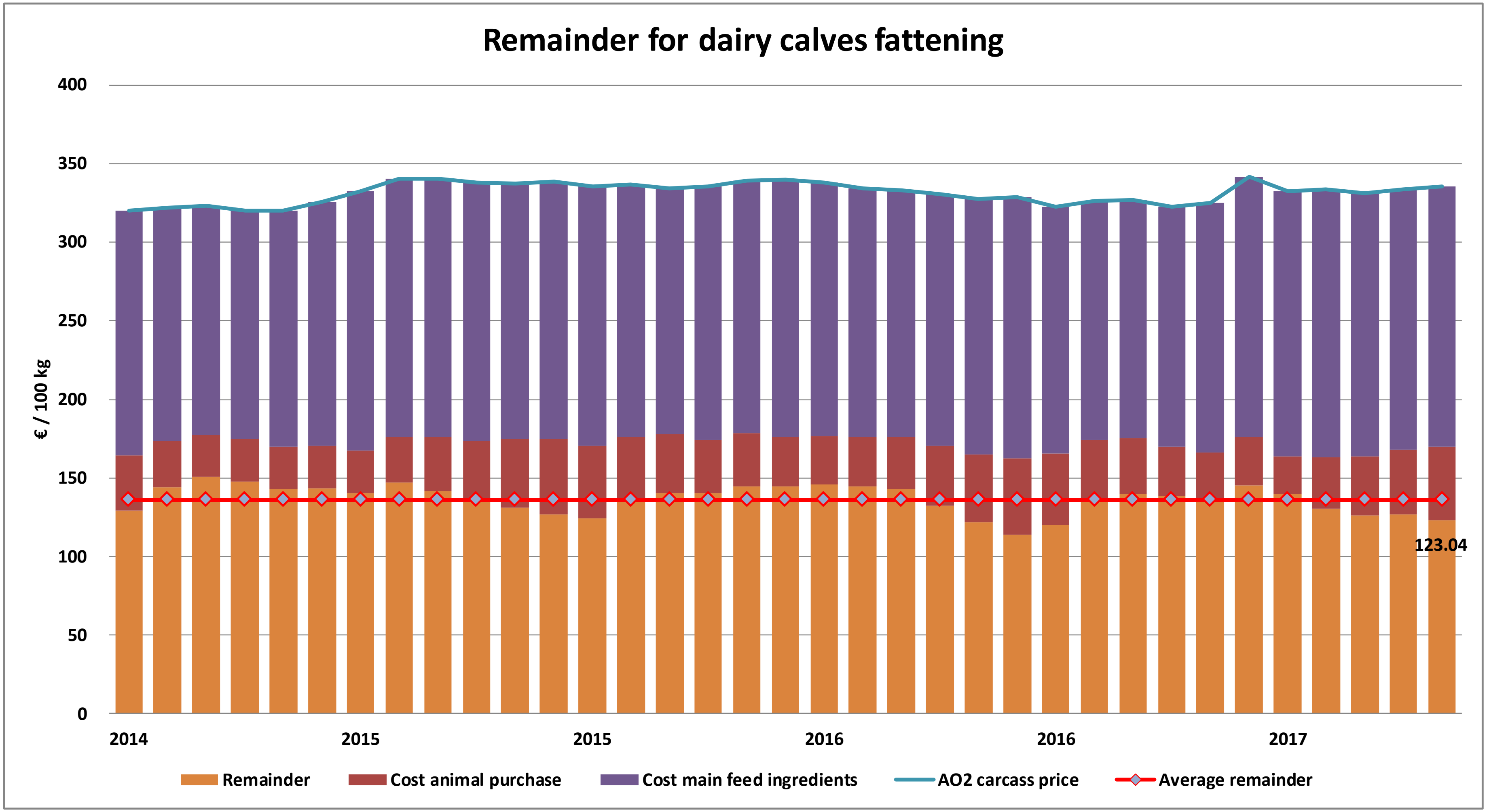
Price in Week 22 **500.26 € / 100 kg of carcasse weight**

Change y/y +1.72%

16 June 2017

REMAINDERS

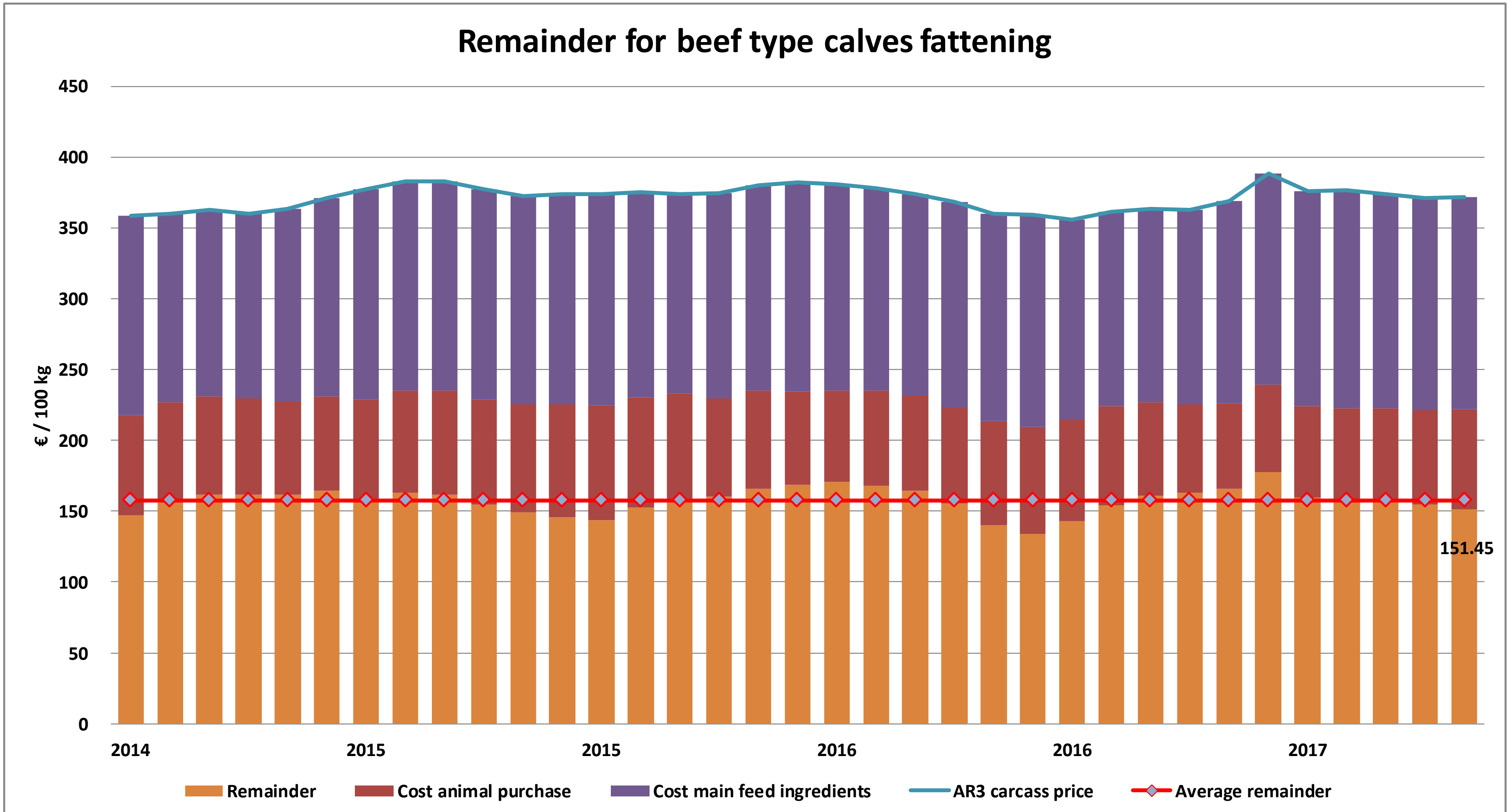
European Commission



16 June 2017

Agriculture and Rural Development

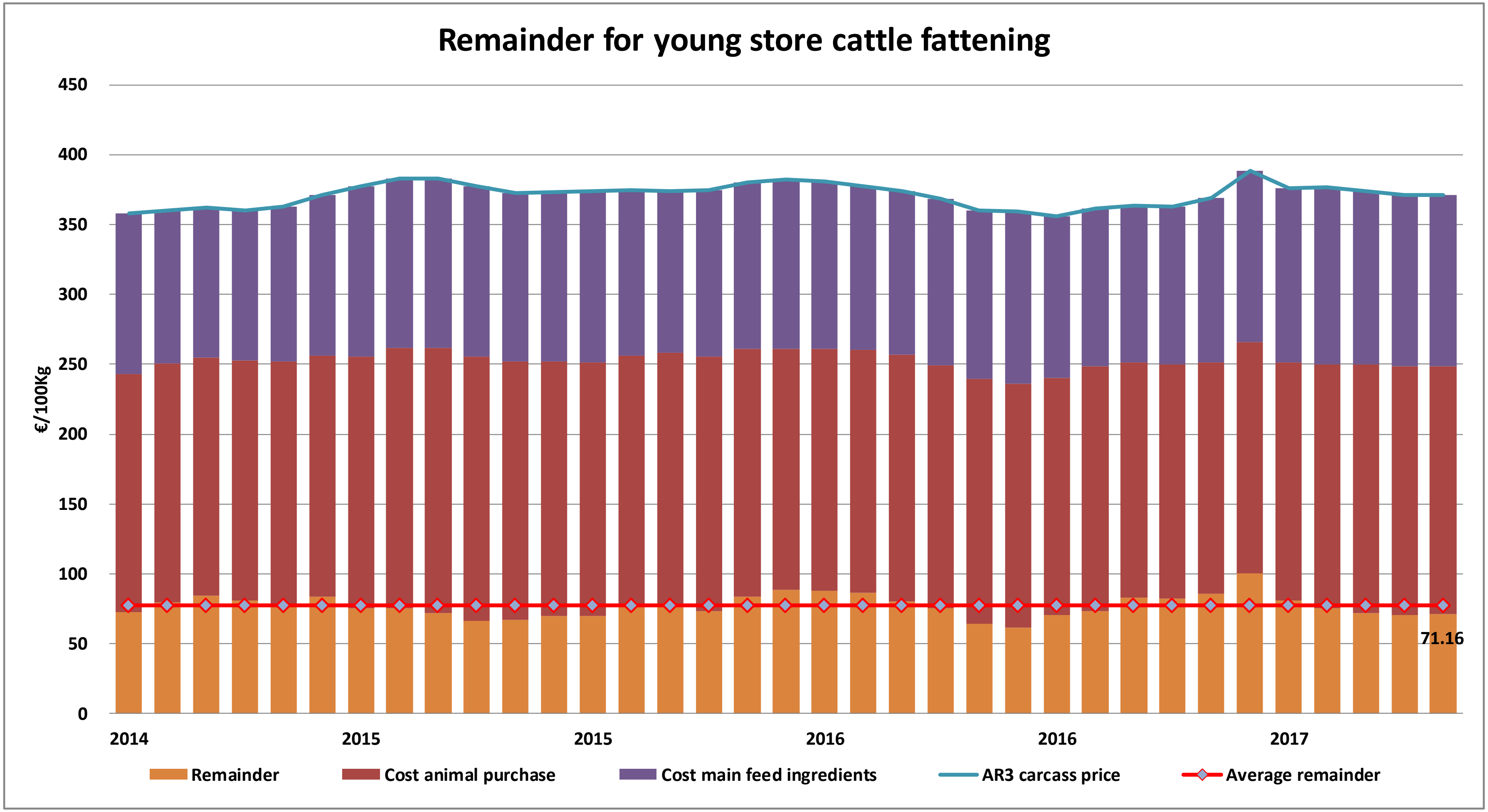
REMAINDERS



16 June 2017

REMAINDERS

European Commission



16 June 2017

European Commission

EU exports of beef and live animals (1):
Trade figures (COMEXT – tonnes cwe)

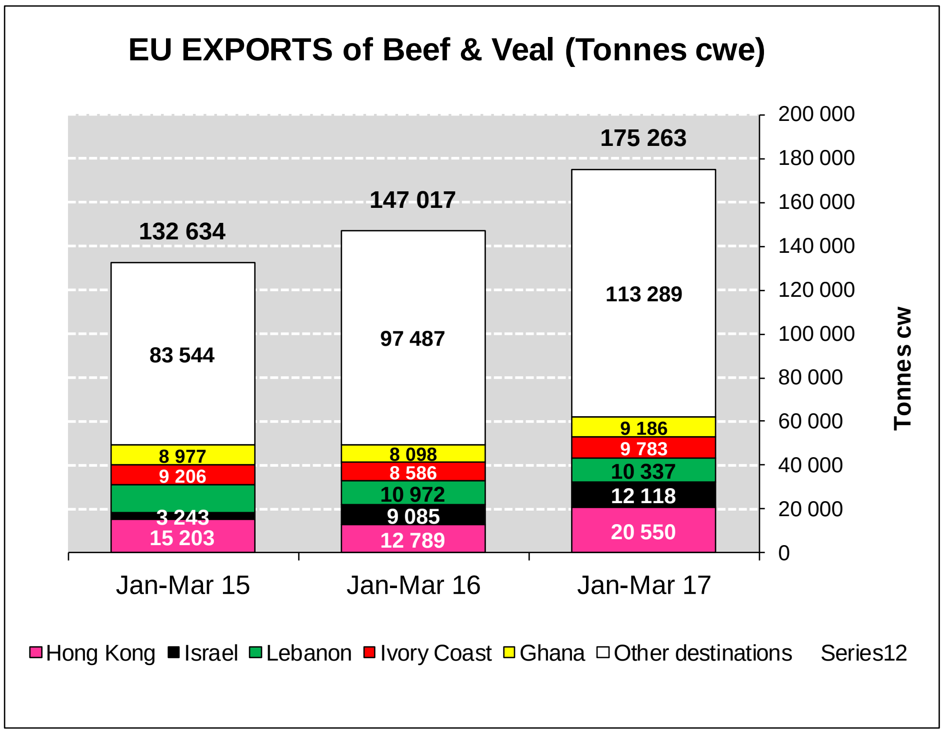
Destinations	2013 tonnes	2013 %	2014 tonnes	2014 %	2015 tonnes	2015 %	2016 tonnes	2016 %	Jan-Mar 17 tonnes	Jan-Mar 17 %	Compared to Jan-Mar 16
Hong Kong	28 573	6.3%	65 112	11.6%	45 198	7.6%	58 350	8.3%	20 550	11.7%	+ 60.7%
Israel	9 378	2.1%	8 353	1.5%	18 851	3.2%	41 678	5.9%	12 118	6.9%	+ 33.4%
Lebanon	24 007	5.3%	37 984	6.8%	50 288	8.4%	47 061	6.7%	10 337	5.9%	- 5.8%
Ivory Coast	21 619	4.8%	28 839	5.2%	35 742	6.0%	36 713	5.2%	9 783	5.6%	+ 14.0%
Ghana	40 878	9.0%	33 255	5.9%	37 364	6.3%	35 351	5.0%	9 186	5.2%	+ 13.4%
Algeria	25 911	5.7%	18 499	3.3%	16 085	2.7%	25 004	3.6%	8 321	4.7%	+ 68.5%
Philippines	2 730	0.6%	11 839	2.1%	13 053	2.2%	24 247	3.5%	8 012	4.6%	+ 107.6%
Bosnia-Herz.	24 068	5.3%	34 104	6.1%	39 928	6.7%	38 929	5.5%	7 774	4.4%	+ 15.3%
Turkey	5 086	1.1%	8 098	1.4%	57 504	9.6%	71 198	10.1%	7 123	4.1%	- 43.3%
Switzerland	26 347	5.8%	26 634	4.8%	26 019	4.4%	25 670	3.7%	6 811	3.9%	+ 11.4%
Vietnam	3 175	0.7%	6 410	1.1%	11 627	1.9%	22 252	3.2%	6 234	3.6%	+ 17.7%
Libya	17 778	3.9%	14 280	2.6%	19 691	3.3%	29 503	4.2%	5 250	3.0%	+ 44.4%
Russia	72 281	16.0%	96 928	17.3%	13 546	2.3%	16 450	2.3%	4 767	2.7%	+ 93.9%
Norway	10 222	2.3%	7 879	1.4%	19 123	3.2%	18 375	2.6%	4 643	2.6%	- 17.6%
Angola	10 589	2.3%	14 587	2.6%	9 643	1.6%	13 549	1.9%	3 285	1.9%	+ 112.6%
Egypt	2 592	0.6%	2 763	0.5%	9 805	1.6%	15 924	2.3%	2 677	1.5%	- 21.2%
For.JRep.Mac	10 577	2.3%	11 370	2.0%	12 561	2.1%	11 781	1.7%	2 536	1.4%	+ 6.2%
Other Destinations	116 726	25.8%	132 305	23.7%	160 282	26.9%	170 303	24.2%	45 856	26.2%	
Extra-EU	452 537		559 238		596 310		702 337		175 263		
% change			+ 24%		+ 7%		+ 18%		+ 19.2%		

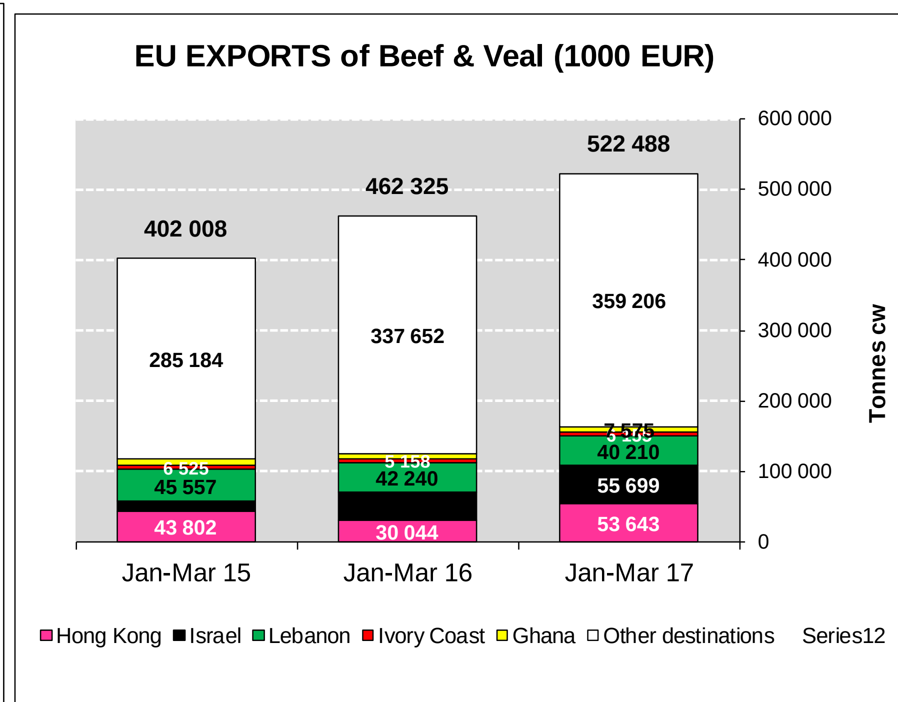
16 June 2017

Agriculture and Rural Development

European Commission

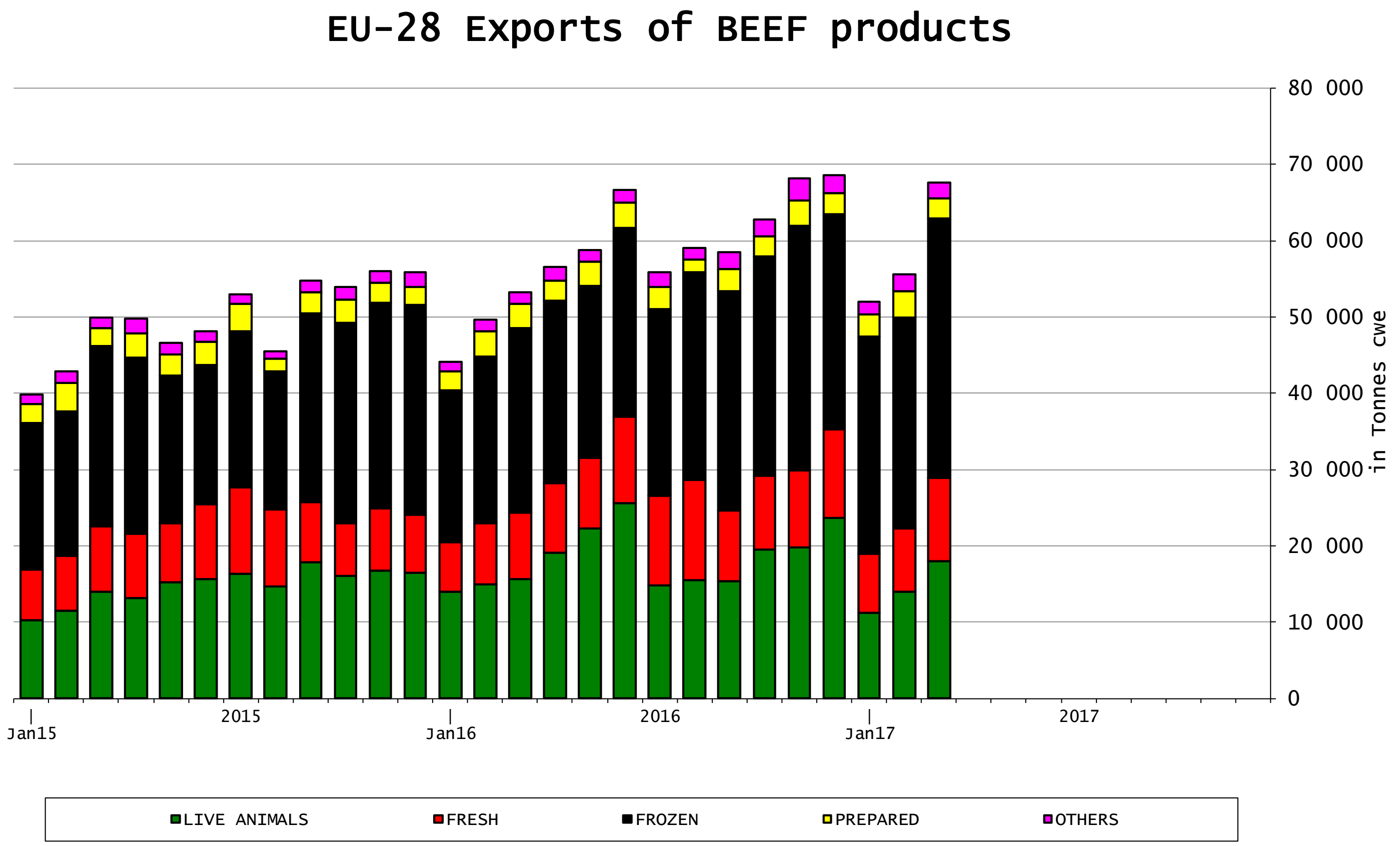
EU exports of beef and live animals:
Trade figures (COMEXT)





16 June 2017

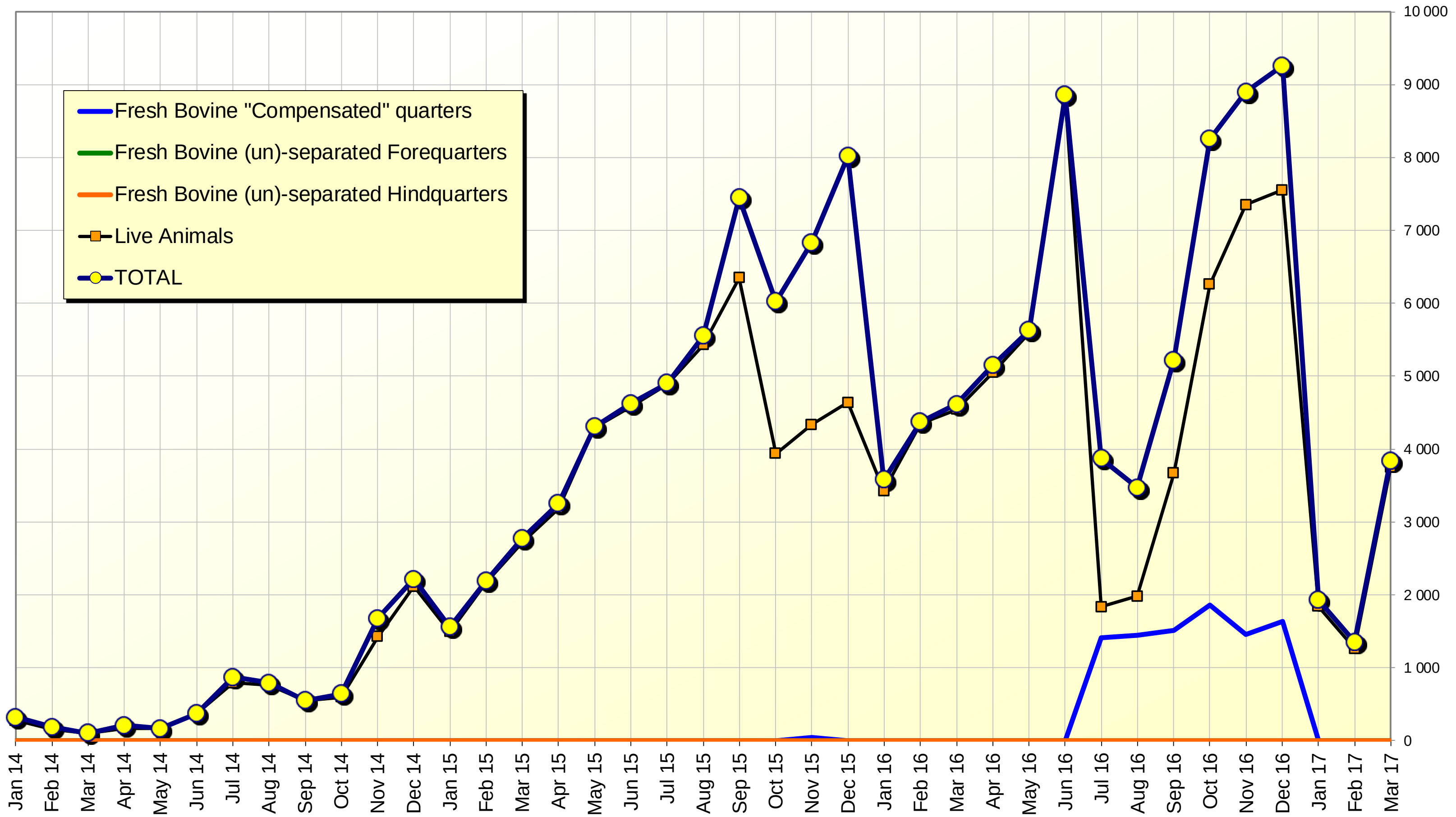
European Commission



16 June 2017

European Commission

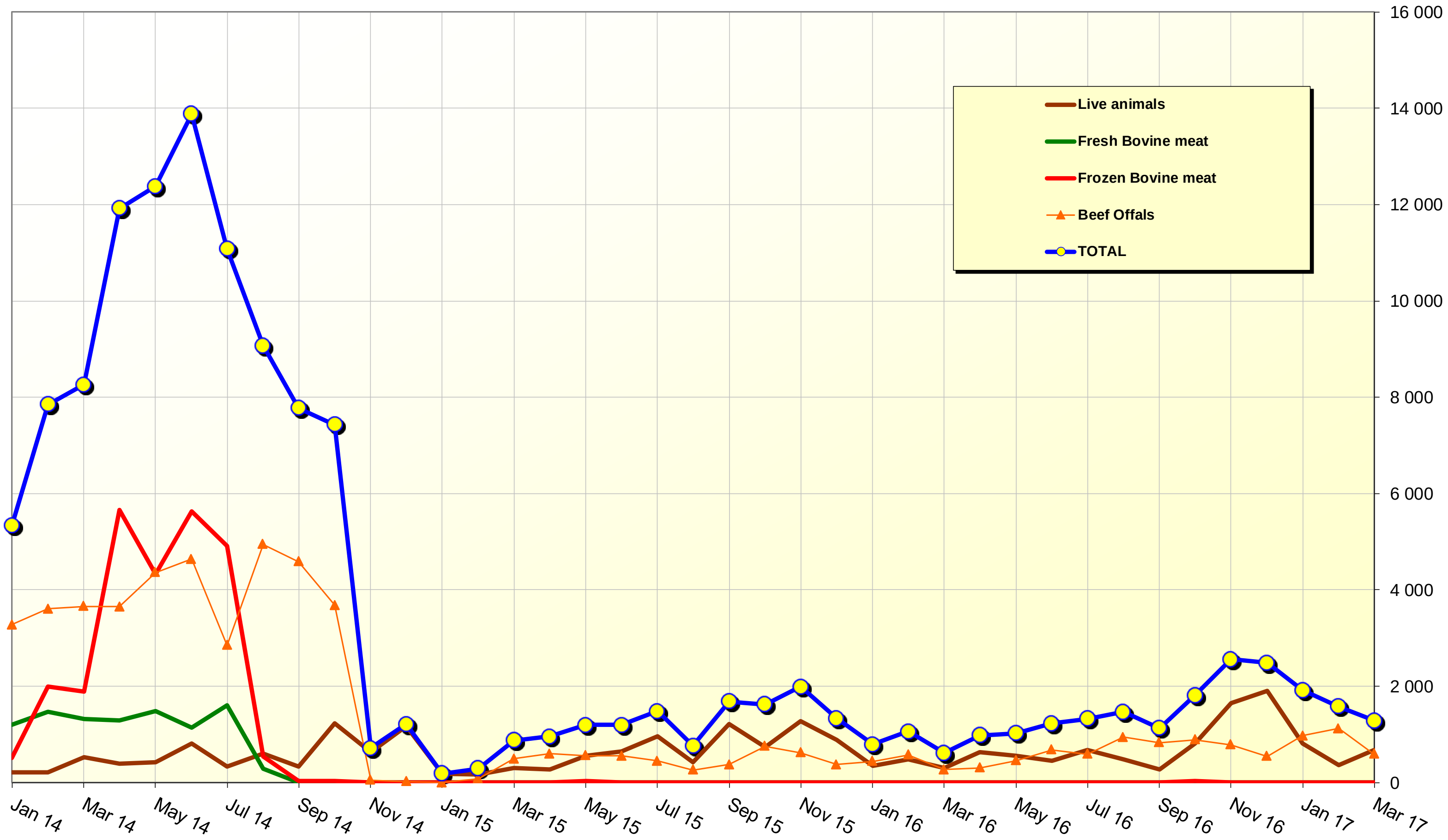
EU beef Exports to TURKEY
Trade figures (COMEXT data) *tonnes cwe*



16 June 2017

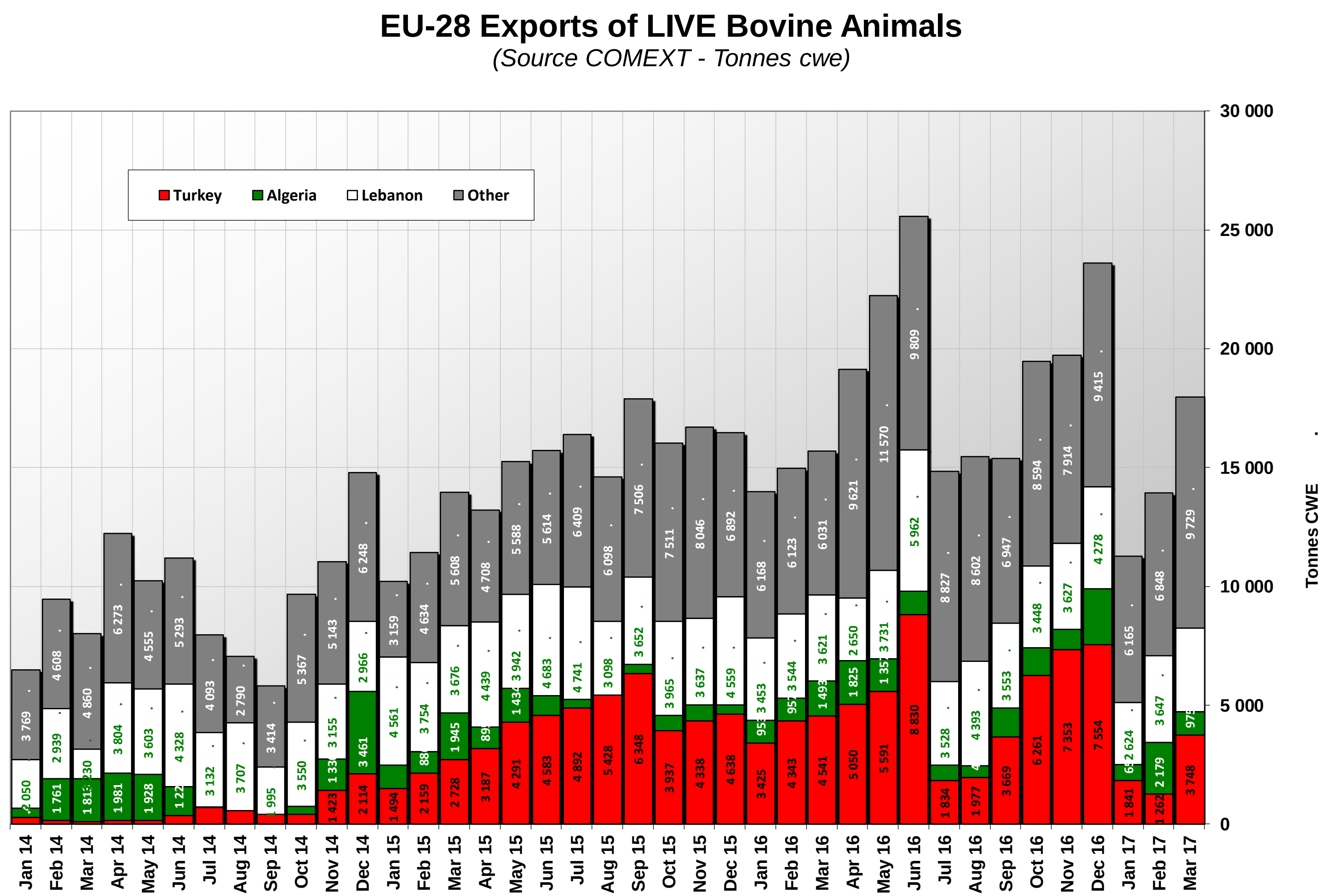
European Commission

EU beef Exports to RUSSIA
Trade figures (COMEXT data) *tonnes cwe*



16 June 2017

European Commission

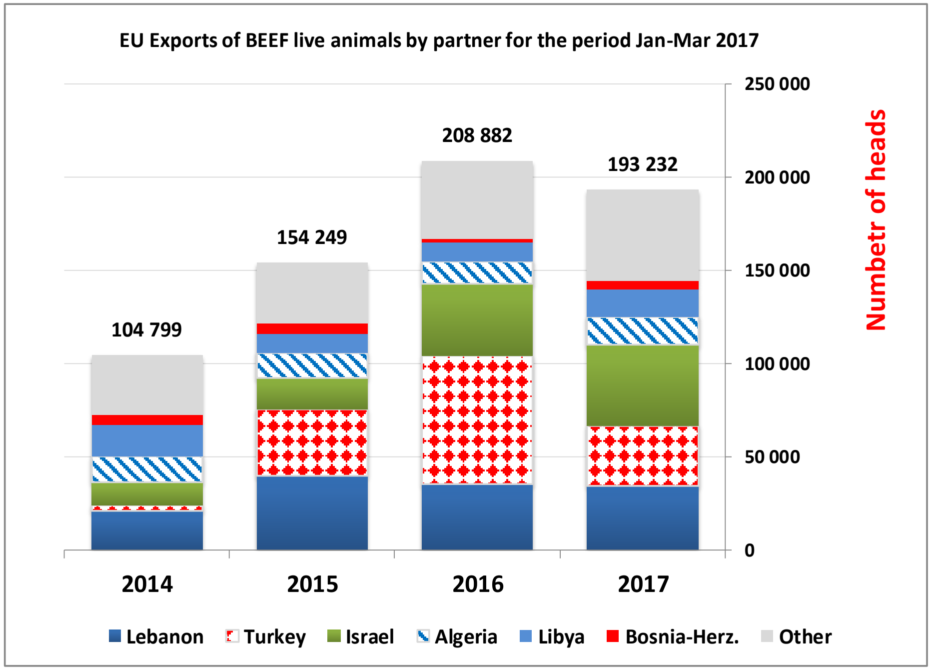


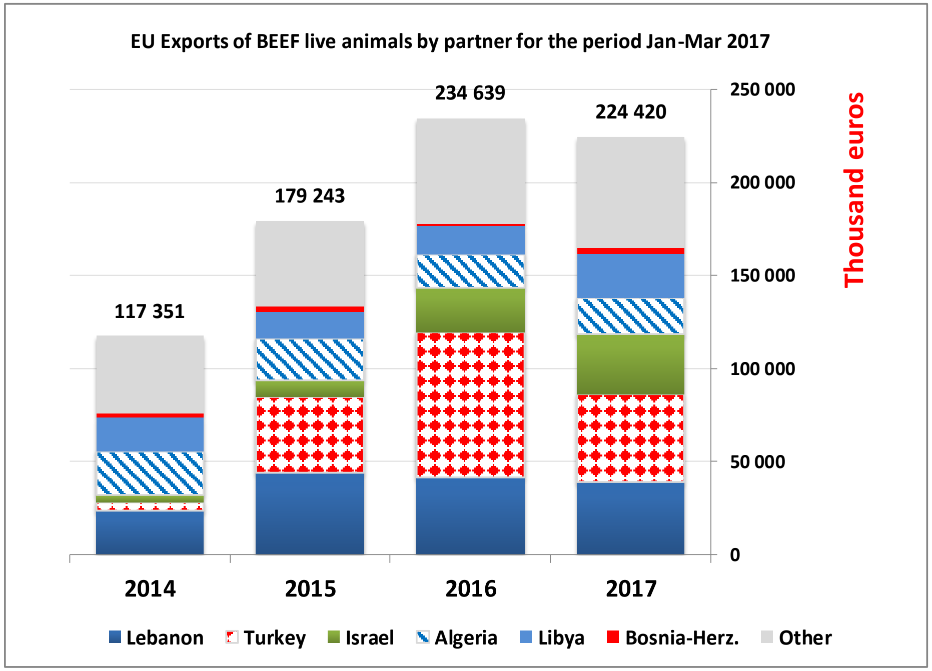
16 June 2017

TRADE

EU EXPORTS Live Animals

European Commission





16 June 2017

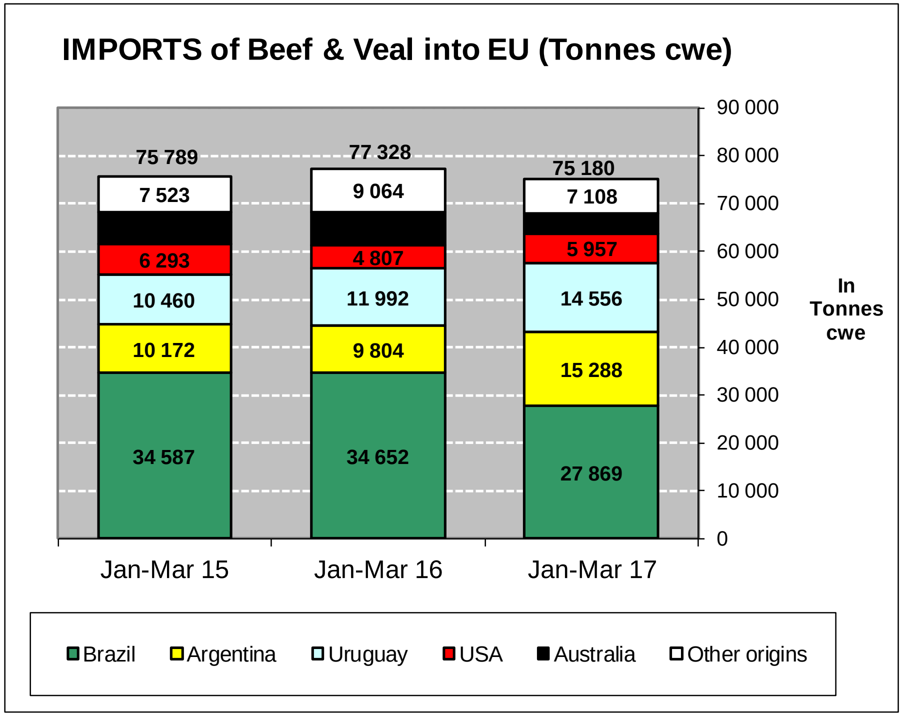
European Commission

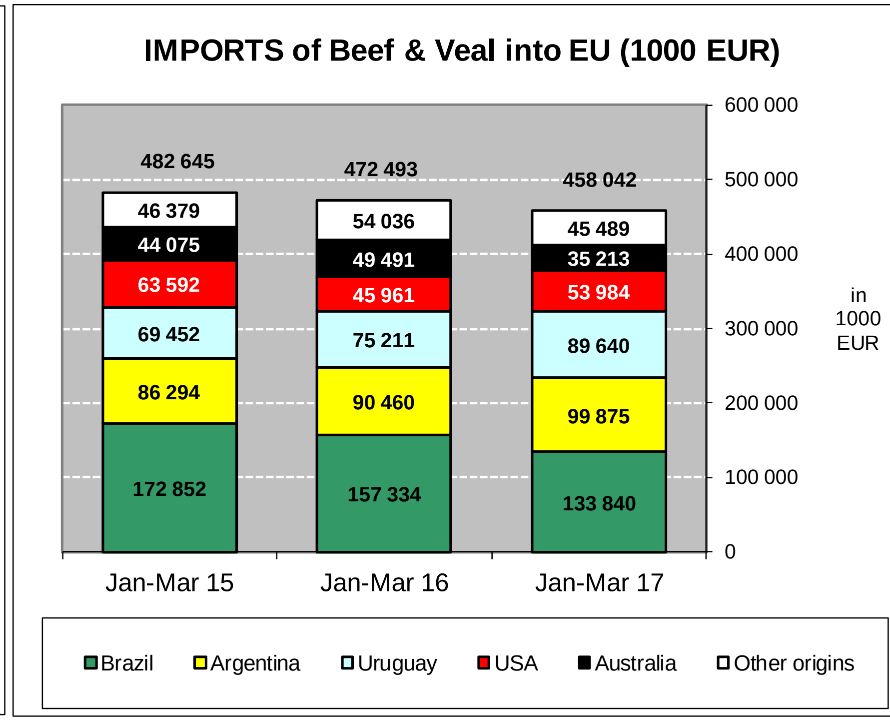
EU imports of beef and live animals (1):
Trade figures (COMEXT – tonnes cwe)

Origins	2013		2014		2015		2016		Jan-Mar 17		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Mar 16
Brazil	145 435	43.5%	144 259	43.4%	136 803	42.3%	140 592	42.1%	27 869	37.1%	- 19.6%
Argentina	47 976	14.3%	42 074	12.7%	42 149	13.0%	43 521	13.0%	15 288	20.3%	+ 55.9%
Uruguay	51 377	15.4%	49 043	14.8%	46 287	14.3%	56 652	17.0%	14 556	19.4%	+ 21.4%
USA	22 297	6.7%	23 234	7.0%	24 132	7.5%	20 533	6.1%	5 957	7.9%	+ 23.9%
Australia	28 074	8.4%	32 653	9.8%	30 884	9.6%	27 749	8.3%	4 403	5.9%	- 37.2%
New Zealand	13 827	4.1%	14 432	4.3%	11 380	3.5%	9 902	3.0%	1 923	2.6%	- 24.4%
Switzerland	4 284	1.3%	5 456	1.6%	5 090	1.6%	5 498	1.6%	1 290	1.7%	- 11.2%
Paraguay	0	0.0%	0	0.0%	1 915	0.6%	5 947	1.8%	1 096	1.5%	- 14.6%
Botswana	6 280	1.9%	6 424	1.9%	9 258	2.9%	9 382	2.8%	1 091	1.5%	- 37.5%
Namibia	11 113	3.3%	9 994	3.0%	12 112	3.7%	10 685	3.2%	925	1.2%	- 33.6%
Ukraine	0	0.0%	570	0.2%	20	0.0%	317	0.1%	178	0.2%	+++
Serbia	619	0.2%	425	0.1%	439	0.1%	557	0.2%	160	0.2%	+ 45.0%
Canada	965	0.3%	780	0.2%	428	0.1%	425	0.1%	107	0.1%	- 12.0%
Japan	3	0.0%	100	0.0%	359	0.1%	497	0.1%	90	0.1%	+ 149.9%
Chile	537	0.2%	875	0.3%	713	0.2%	602	0.2%	68	0.1%	- 41.5%
Turkey									38	0.1%	- 5.4%
Norway	201	0.1%	347	0.1%	481	0.1%	274	0.1%	36	0.0%	- 53.4%
Other Origins	1 640	0.5%	1 695	0.5%	596	0.2%	849	0.3%	105	0.1%	
Extra-EU	334 630		332 362		323 043		333 981		75 180		
% change			- 1%		- 3%		+ 3%		- 2.8%		

European Commission

EU imports of beef and live animals (2):
Trade figures (COMEXT)

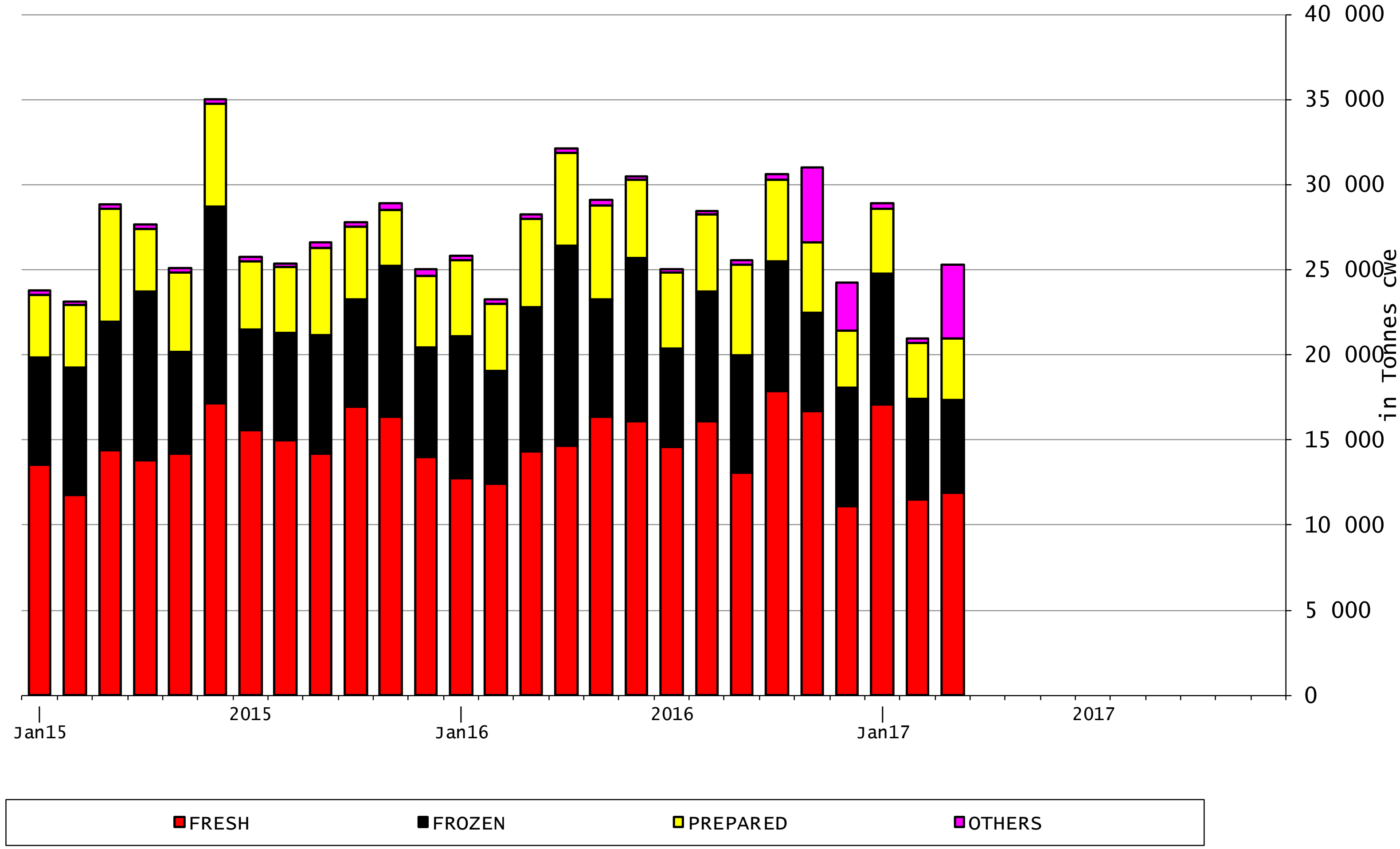




TRADE

EU IMPORTS
Beef Products

EU-28 Imports of BEEF products

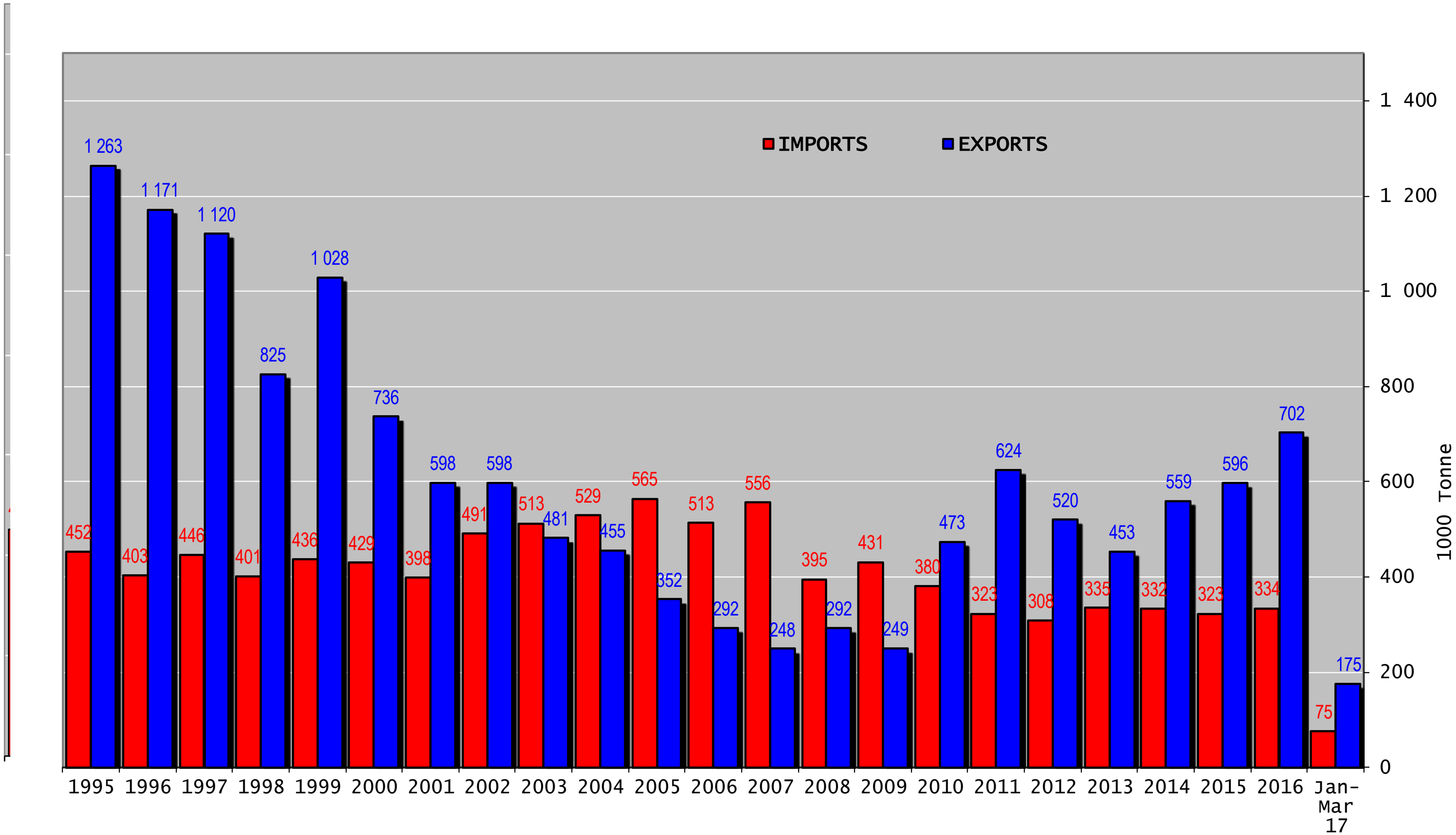


16 June 2017

Agriculture and Rural Development

European Commission

Trade balance of beef and live animals

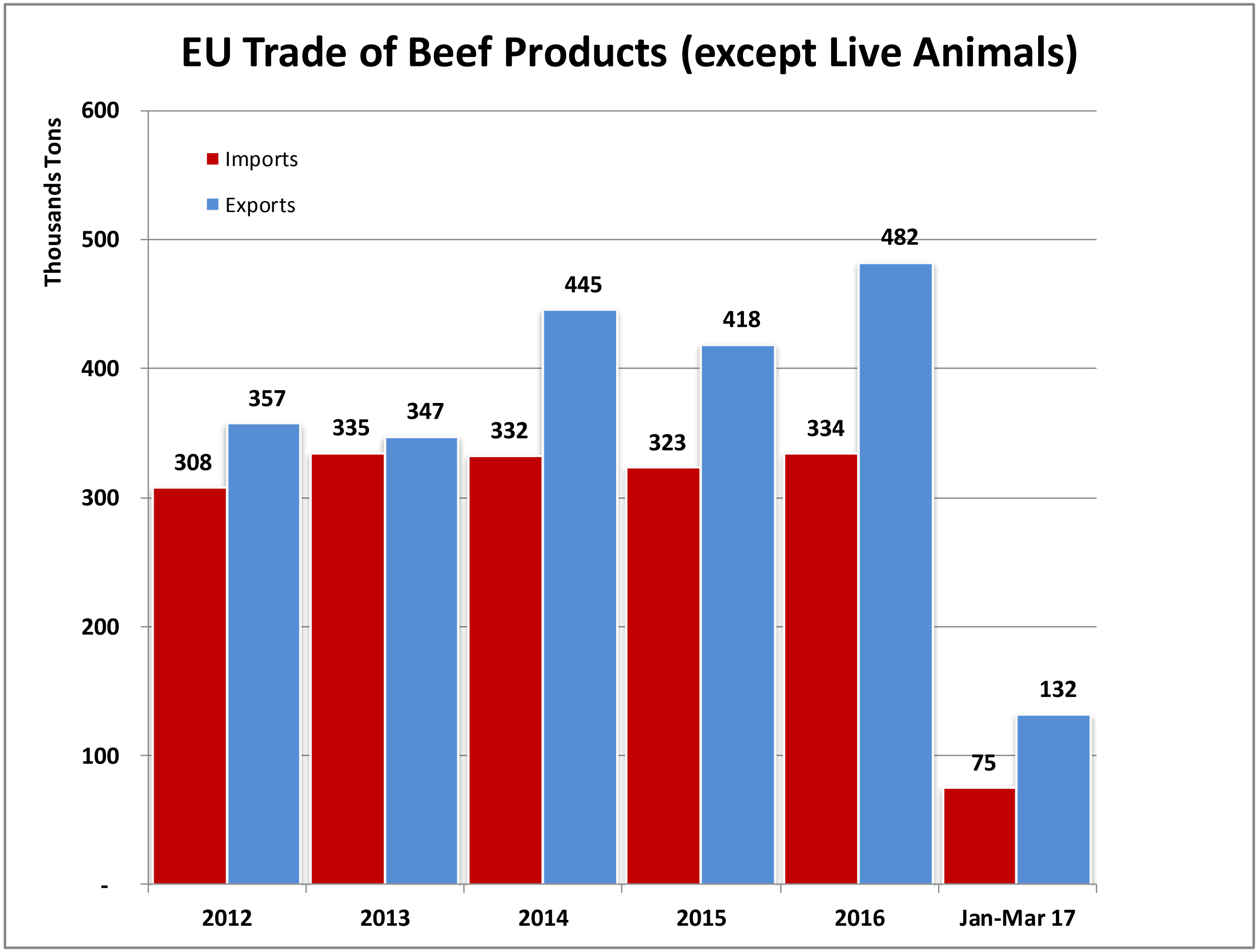


16 June 2017

EU TRADE BALANCE

Beef

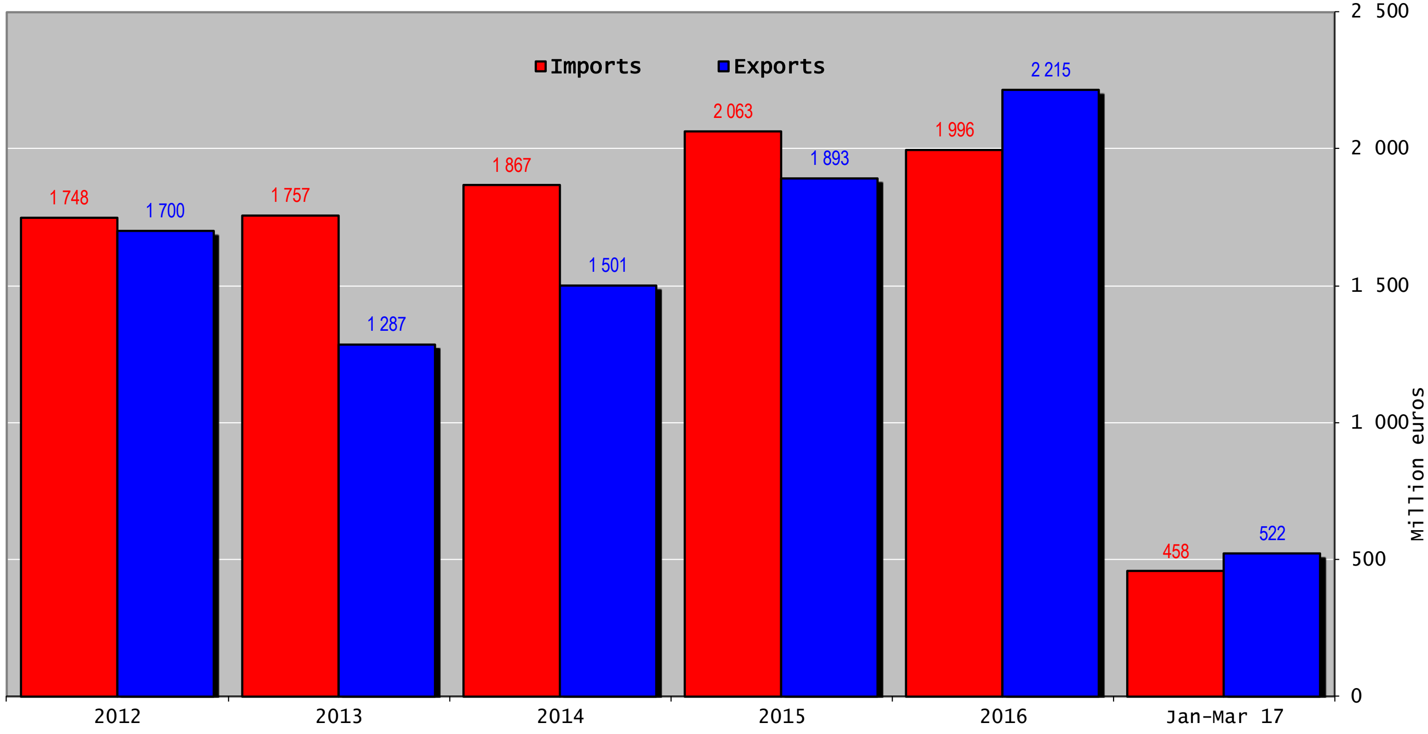
European Commission



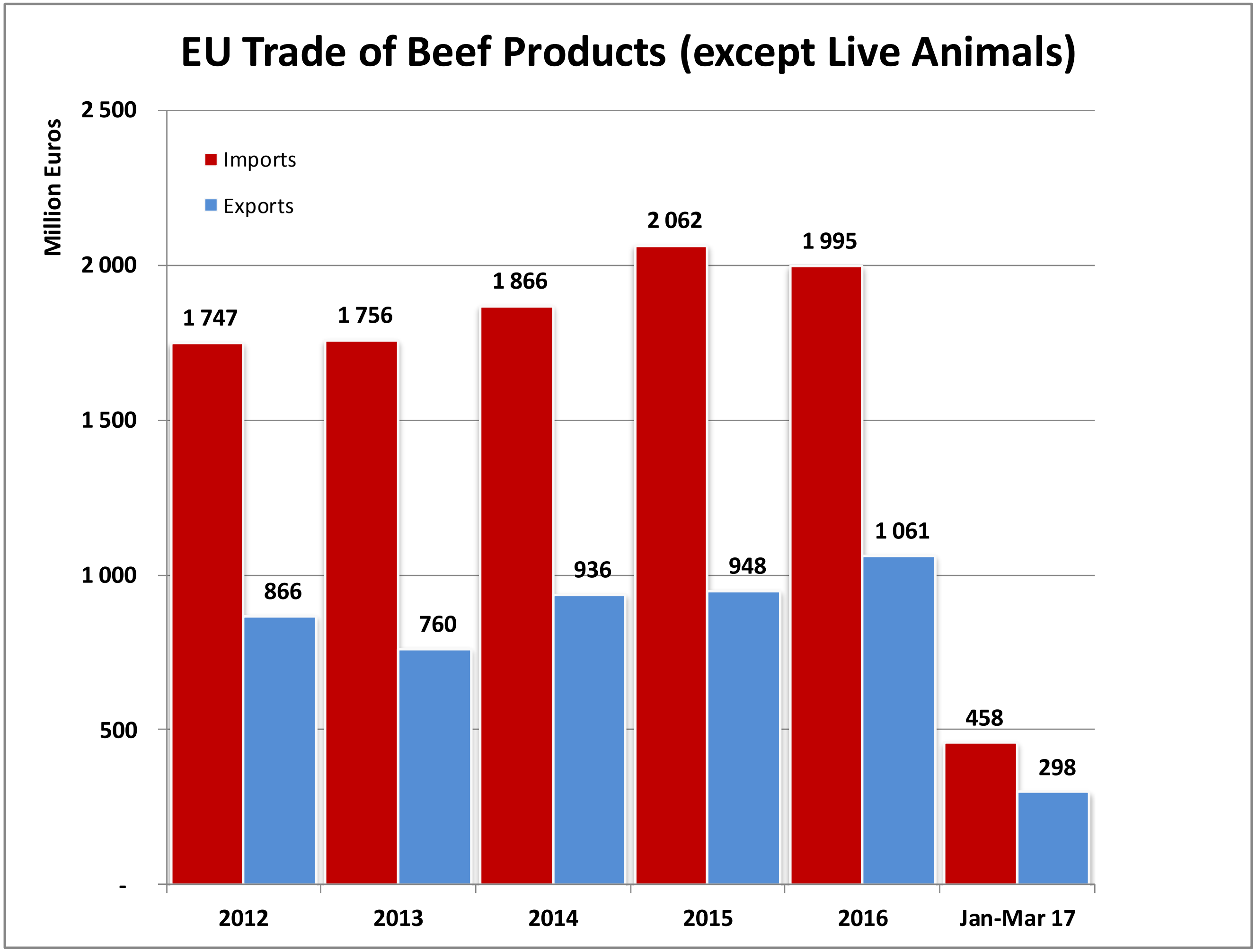
16 June 2017

European Commission

Trade balance of beef and live animals



European Commission



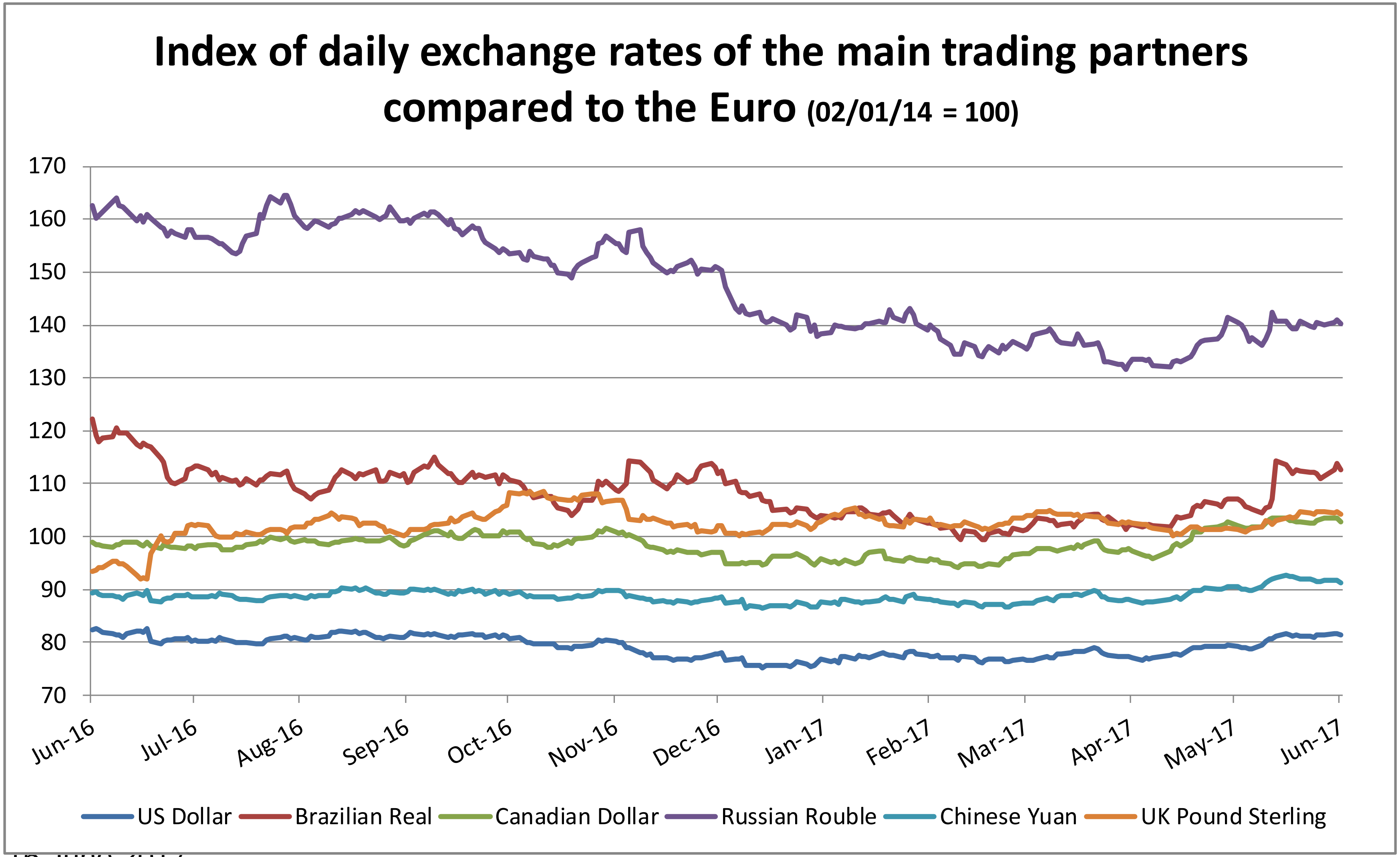
16 June 2017

WORLD BEEF MARKET

EXCHANGE RATE INDEX / Euro

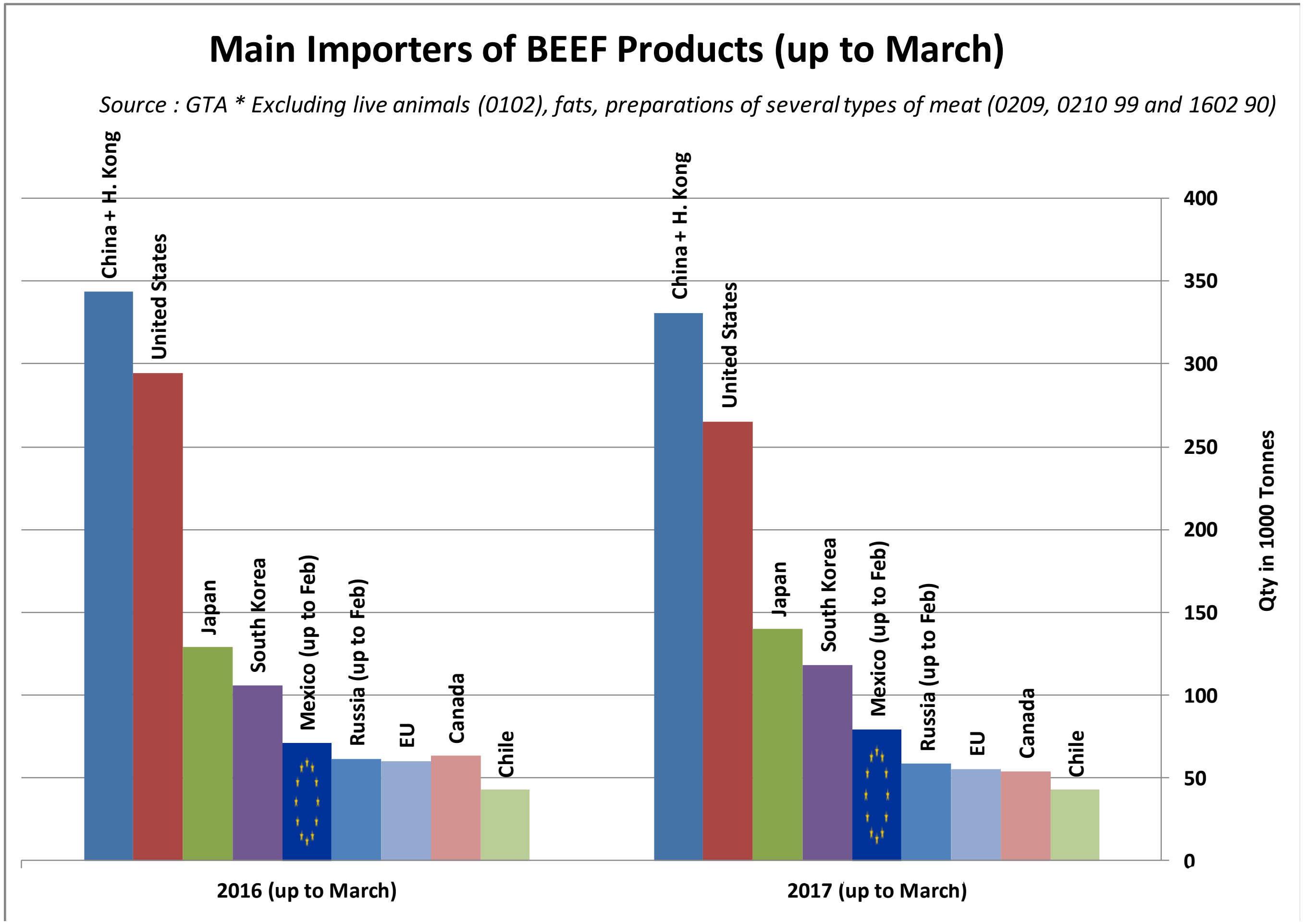
Main Trading Partners

European Commission



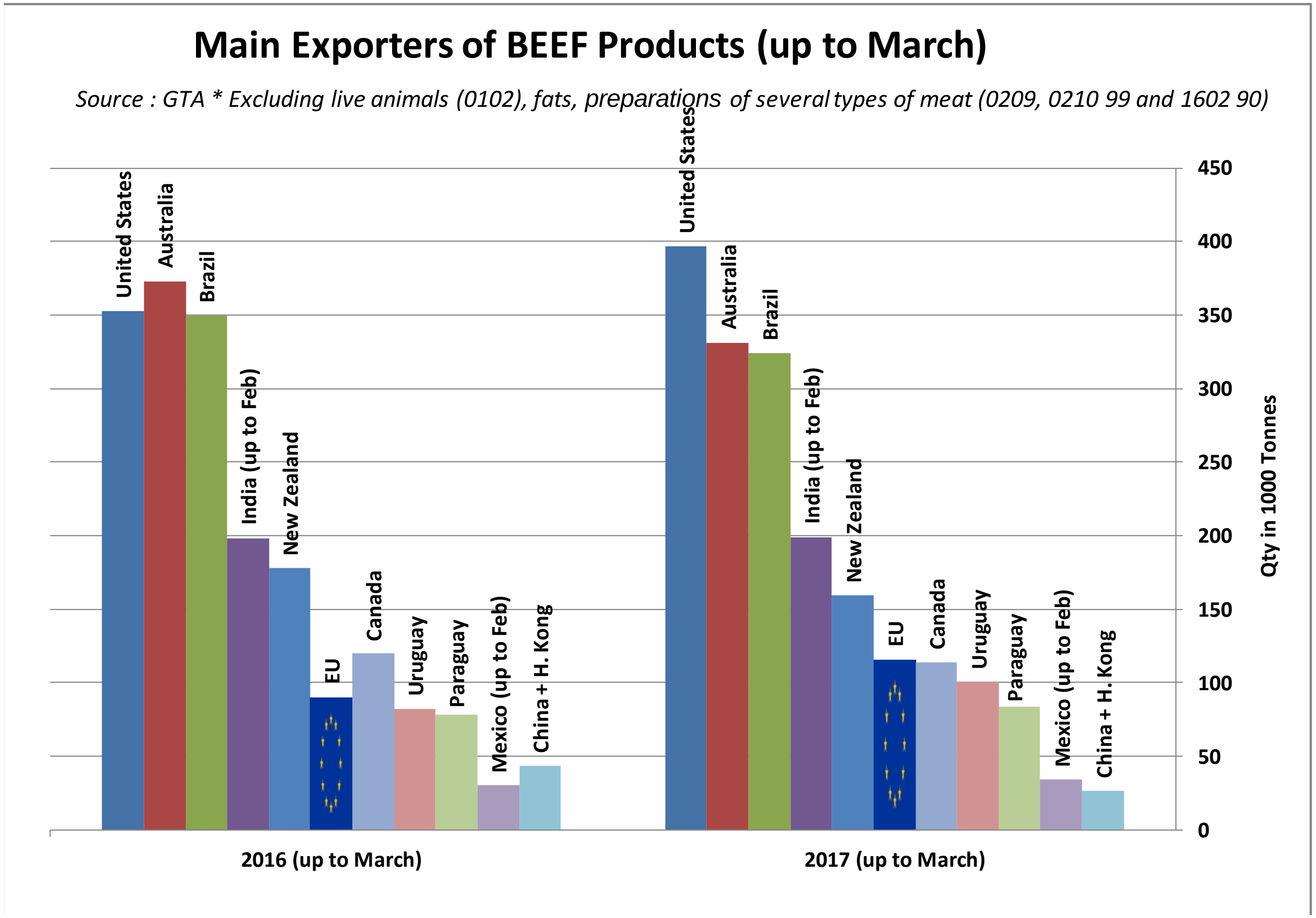
16 June 2017

Source : GTA * Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



European Commission

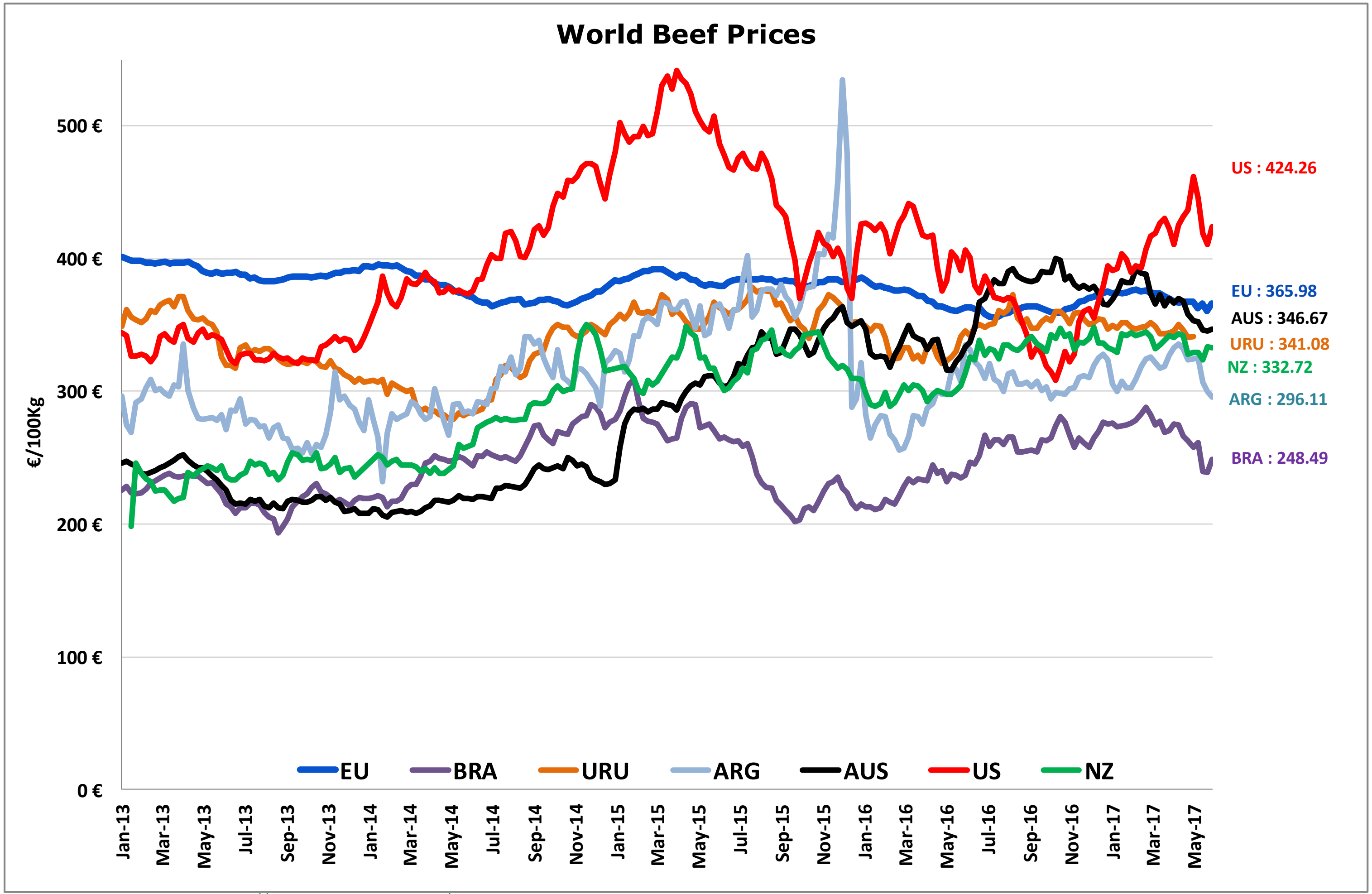
Source : GTA * Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



WORLD BEEF MARKET

STEER PRICES EU, US, AUS, NZ

European Commission



BR http://www.pecuaria.com.br/cotacoes.php

NZ http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html

16 June 2017

Agriculture and Rural Development

High Quality Beef Import Quotas

European Commission

Hilton Quota **Regulation (EU) N° 593/2013**

		Quantity allocated (Tons)	2013/2014		2014/2015		2015/2016		2016/2017*	
			Use		Use		Use		Use	
09.4001	Australia	2 250								
09.4004	Argentina	200	15.71	7.86%	9.46	4.73%	12.21	6.11%	10.83	5.42%
09.4450	Argentina	29 500	23 663.86	80.22%	22 867.03	77.52%	22 350.61	75.76%	19 772.20	67.02%
09.4451	Australia	7 150	7 138.89	99.84%	6 815.93	95.33%	6 749.85	94.40%	3 771.41	52.75%
09.4452	Uruguay	6 300	6 278.75	99.66%	6 280.98	99.70%	6 249.09	99.19%	5 819.72	92.38%
09.4453	Brazil	10 000	4 078.92	40.79%	7 989.89	79.90%	9 289.17	92.89%	7 911.36	79.11%
09.4454	New Zealand	1 300	1 299.61	99.97%	1 299.45	99.96%	1 299.95	100.00%	1 037.30	79.79%
09.4002	Canada/US	11 500	431.80	3.75%	353.46	3.07%	292.16	2.54%	414.10	3.60%
09.4455	Paraguay	1 000		0.00%	12.13	1.21%	915.63	91.56%	865.06	86.51%
Total Beef		66 750	42 891.83	64.26%	45 618.87	68.34%	47 146.46	70.63%	39 591.15	59.31%
Total Buffalo		2 450	15.71	0.64%	9.46	0.39%	12.21	0.50%	10.83	0.44%
Total		69 200	42 907.54	62.01%	45 628.33	65.94%	47 158.67	68.15%	39 601.98	57.23%

* up to 30/04/2017

High Quality Beef Import Quotas

European Commission

Quota ergaomnes **Regulation (EU) No 481/2012**

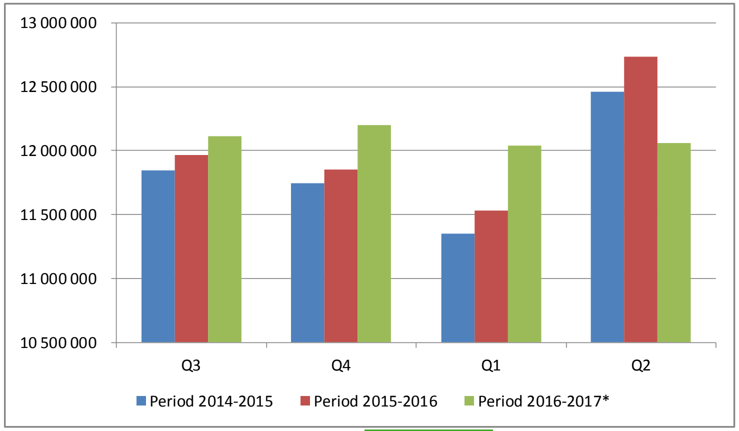
	2013-Q3	2013-Q4	2014-Q1	2014-Q2	TOTAL
Period 2013-2014	10 198 942	10 493 437	10 191 527	10 282 860	41 166 765
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	84.64%	87.08%	84.58%	85.33%	85.41%

	2014-Q3	2014-Q4	2015-Q1	2015-Q2	TOTAL
Period 2014-2015	11 842 700	11 745 231	11 353 830	12 457 389	47 399 150
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	98.28%	97.47%	94.22%	103.38%	98.34%
Available after transfer	12 050 000	12 257 300	12 562 069	13 258 240	
	98.28%	95.82%	90.38%	93.96%	

	2015-Q3	2015-Q4	2016-Q1	2016-Q2	TOTAL
Period 2015-2016	11 965 843	11 851 187	11 528 823	12 736 406	48 082 260
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	99.30%	98.35%	95.67%	105.70%	99.76%
Available after transfer	12 050 000	12 134 157	12 332 969	12 854 146	
	99.30%	97.67%	93.48%	99.08%	

	2016-Q3	2016-Q4	2017-Q1	2017-Q2	TOTAL
Period 2016-2017*	12 110 176	12 197 542	12 037 275	12 060 655	48 405 648
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	100.50%	101.22%	99.89%	100.09%	100.43%
Available after transfer	12 050 000	11 989 824	11 842 281	11 855 007	
	100.50%	101.73%	101.65%	101.73%	

* Until 08.06.2017



16 June 2017

European Commission

EU27 Trade with UK
(Eurostat COMEXT data)

16 June 2017

Agriculture and Rural Development

T R A D E EU27-UK Share of EU27 exports

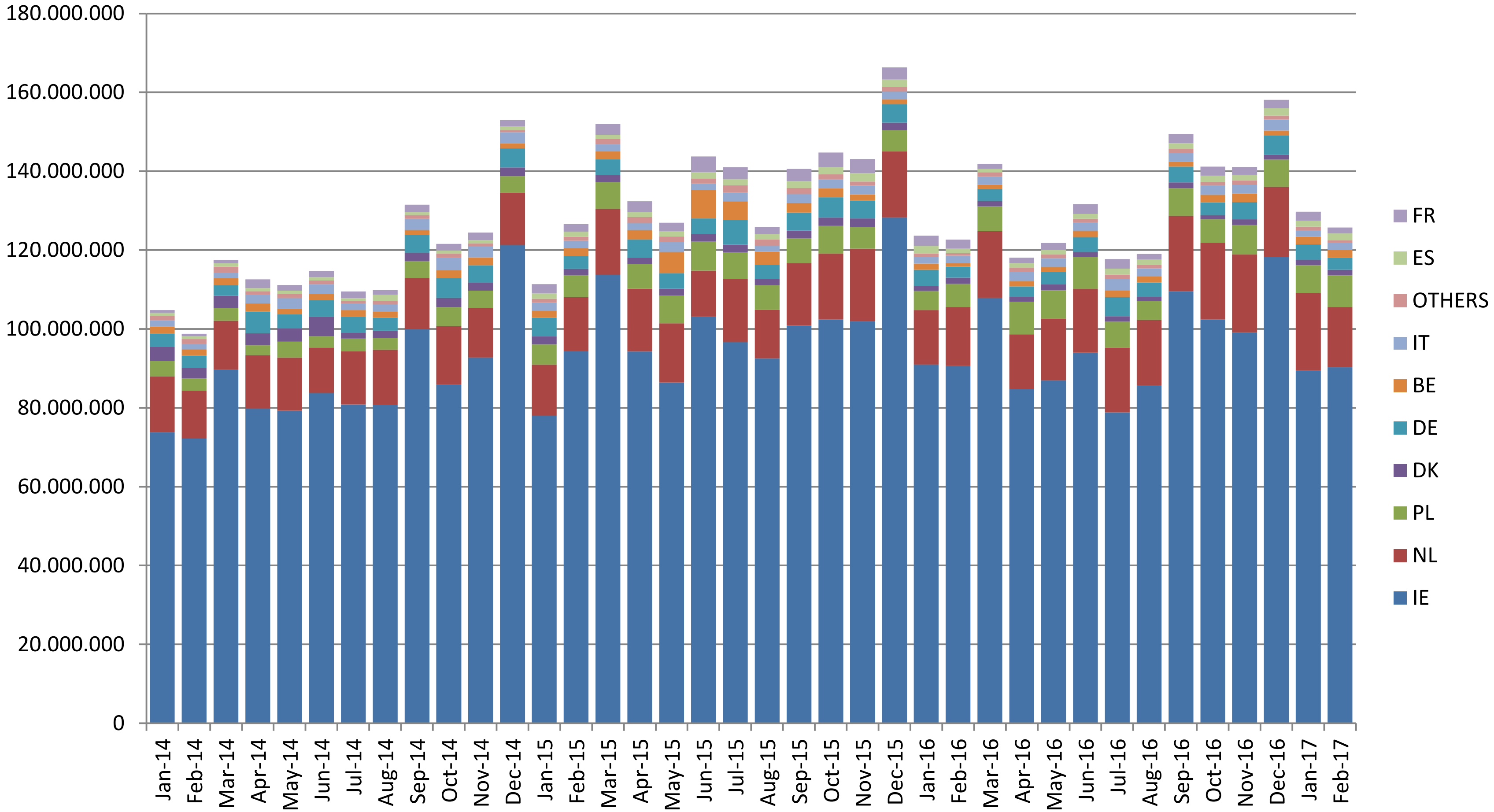
European Commission

MEMBER STATE	EU27	EXTRA EU	UNITED KINGDOM
IE	37,37%	11,57%	51,06%
NL	83,27%	9,21%	7,52%
PL	82,14%	14,12%	3,74%
DE	81,84%	15,87%	2,29%
BE	88,73%	7,74%	3,53%
FR	87,91%	11,19%	0,90%
DK	84,13%	10,29%	5,58%
ES	66,77%	31,72%	1,52%
IT	76,39%	21,73%	1,88%
AT	79,47%	19,64%	0,90%
RO	47,66%	51,27%	1,06%
BG	30,41%	65,81%	3,78%
LU	98,30%	0,08%	1,62%
LT	73,64%	25,88%	0,48%
SE	90,60%	8,88%	0,51%
PT	72,23%	27,69%	0,08%
EL	79,09%	18,62%	2,29%
CZ	89,32%	10,66%	0,02%
LV	90,52%	9,40%	0,07%
EE	84,14%	15,76%	0,11%
HR	22,18%	77,79%	0,02%
HU	51,48%	48,50%	0,02%
MT	13,55%	86,21%	0,24%
SK	80,96%	19,04%	0,00%
SI	49,89%	50,11%	0,00%
CY	3,37%	96,63%	0,00%
FI	89,57%	10,43%	0,00%
Total EU27	**74,57%**	**16,43%**	**9,00%**

Agriculture and Rural Development

T R A D E EU27-UK

Evolution of EU27 exports to UK (Quantity in 100Kg)

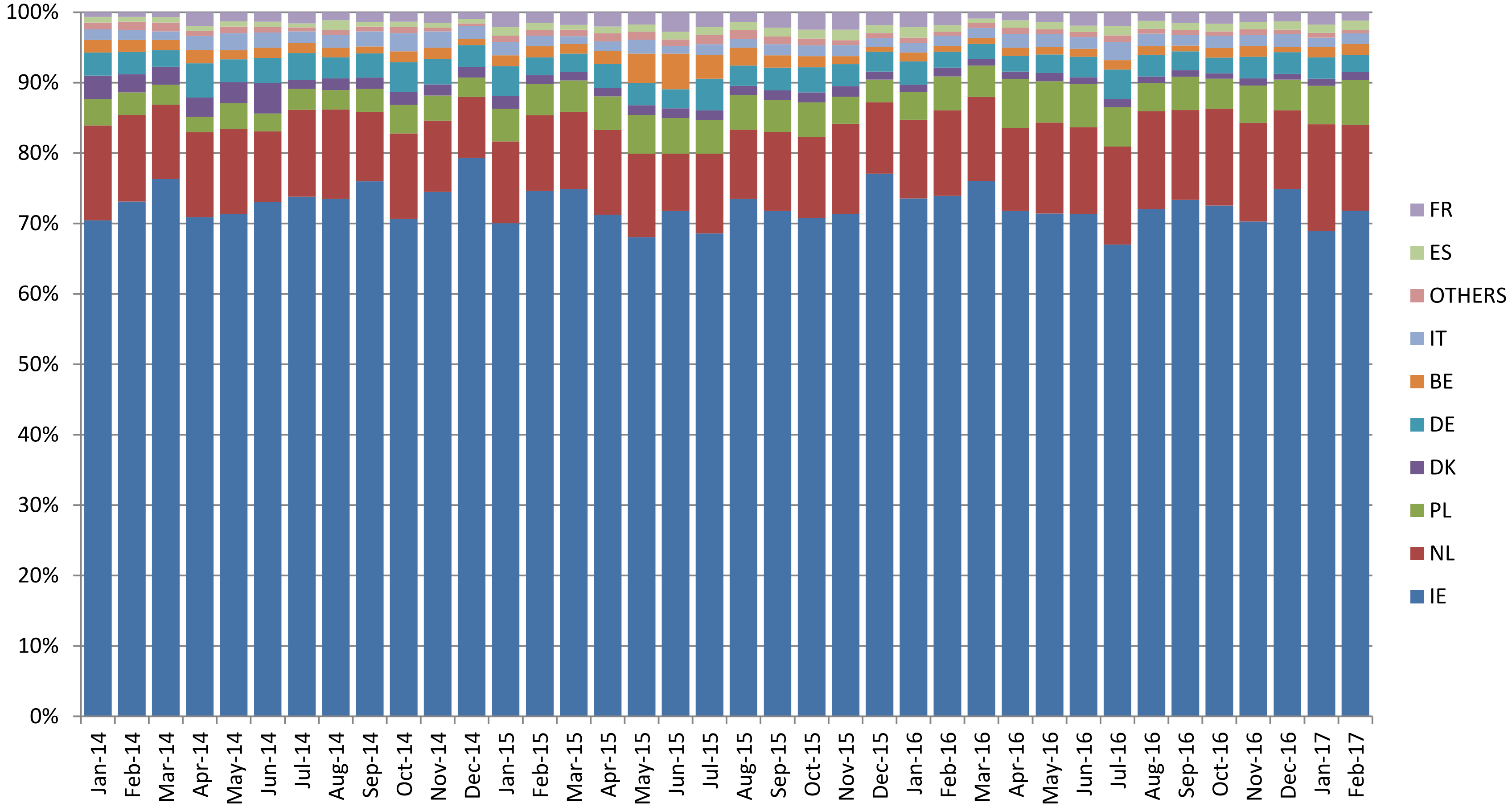


Agriculture and Rural Development

T R A D E EU27-UK

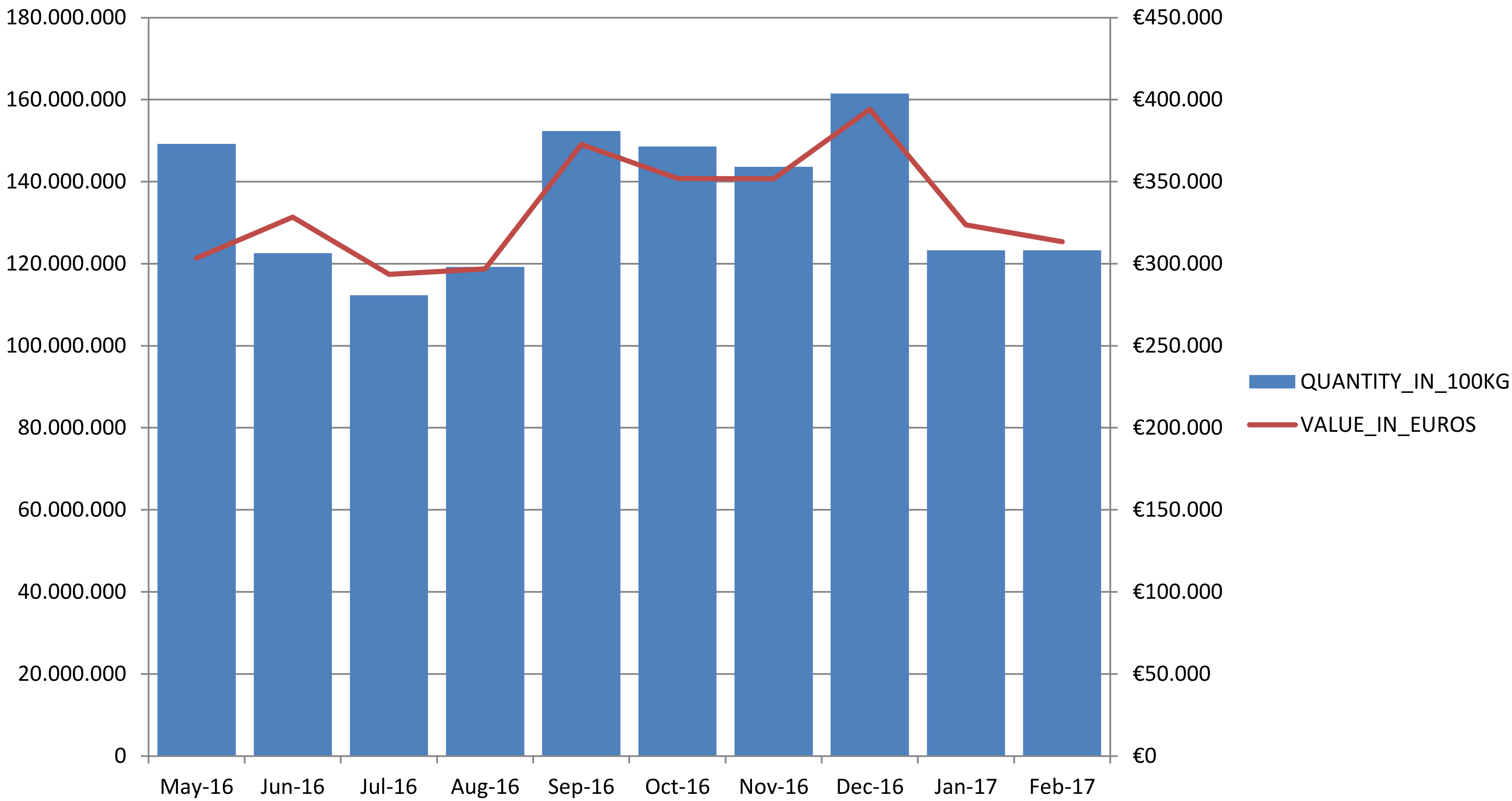
Evolution of EU27 exports to UK

European Commission



T R A D E EU27-UK

Evolution of EU27 exports to UK (Quantity in 100Kg and Value in EUR/100Kg)



Annex II

PIGMEAT MARKET SITUATION

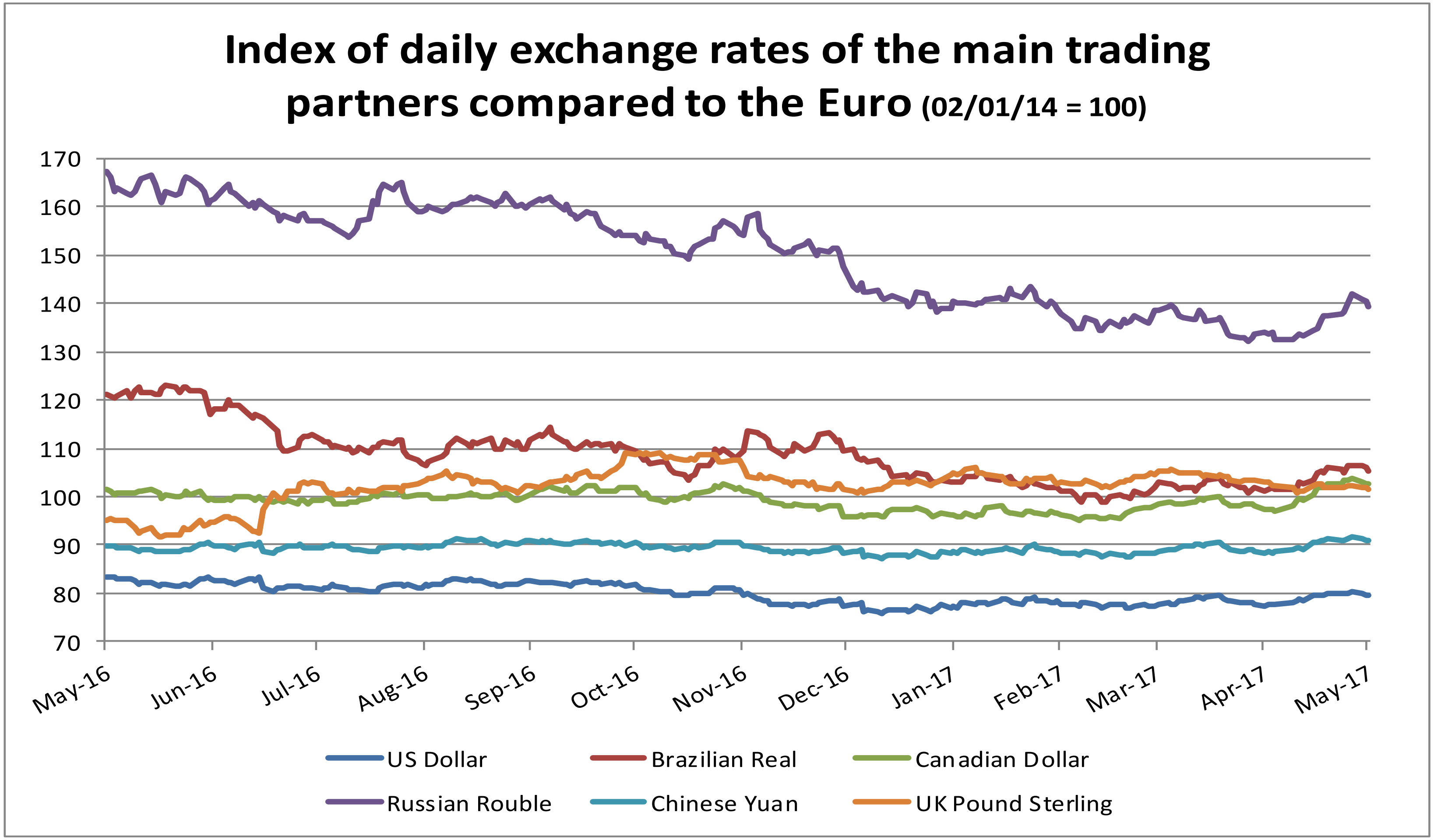
Meat Market Observatory – Economic Board Meeting

13 June 2017

European Commission
Agriculture and Rural Development

EXCHANGE RATE INDEX/EURO

European Commission



European Commission

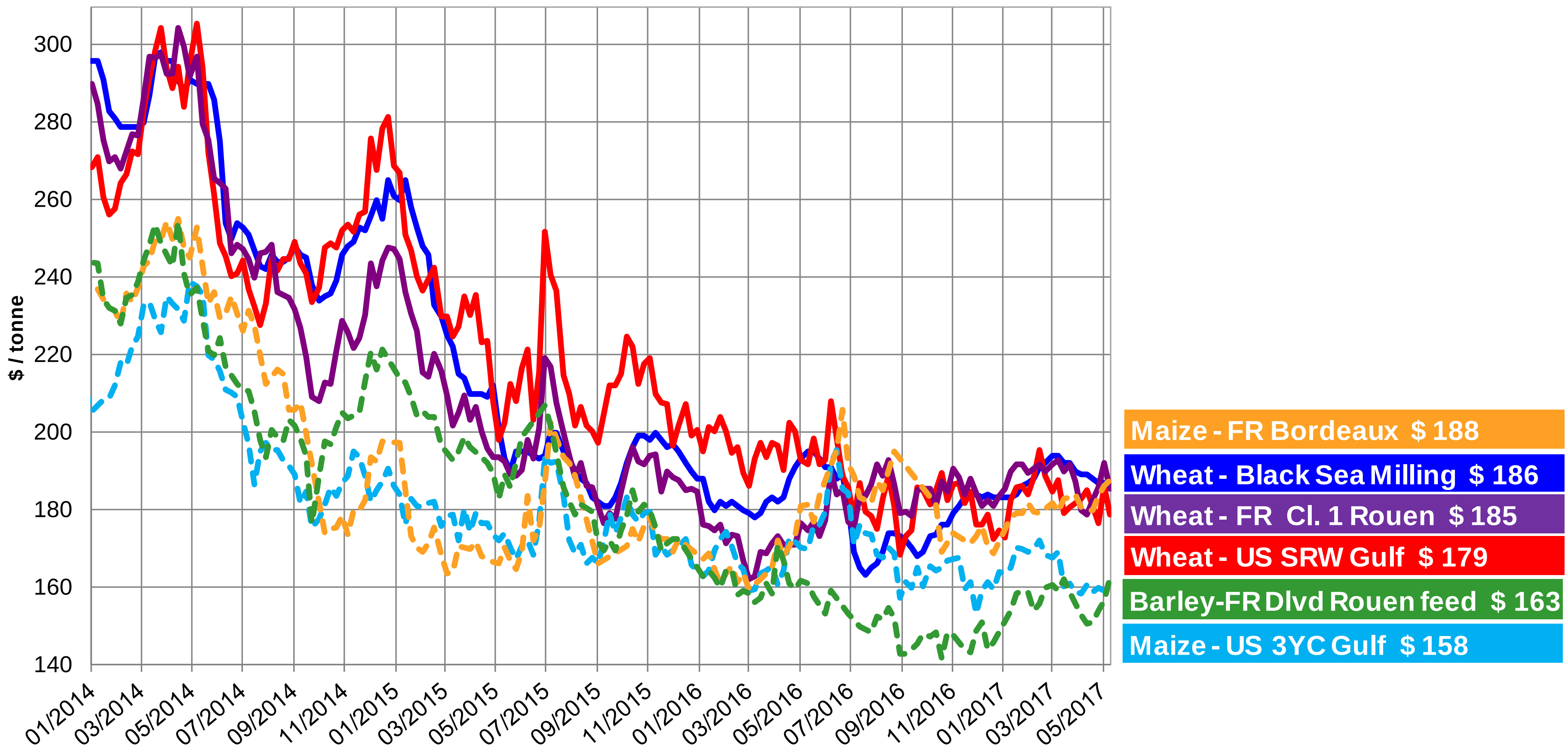
Feed costs

Agriculture
and Rural
Development

FEED COSTS

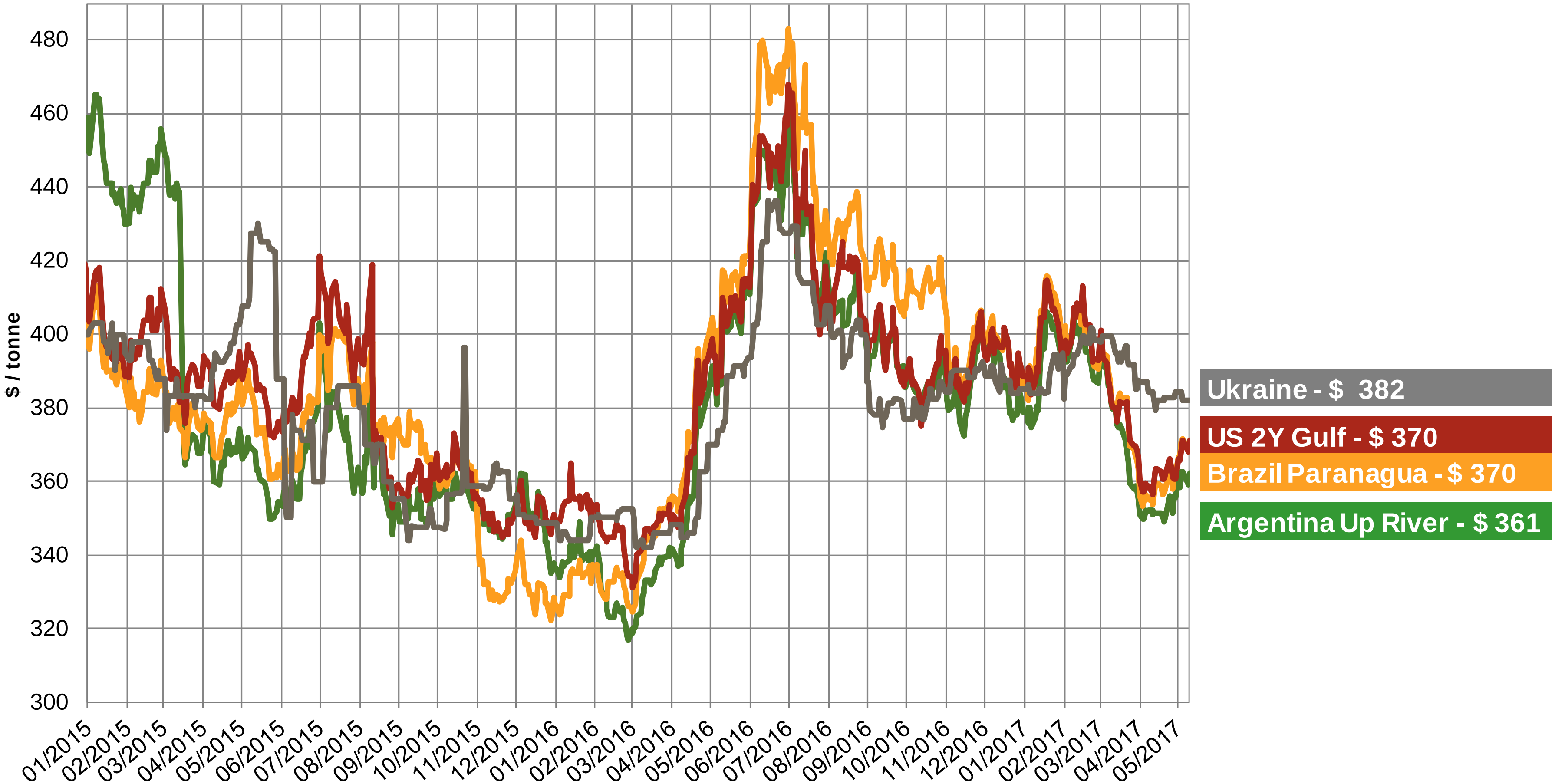
European Commission

World cereal prices ($/t)

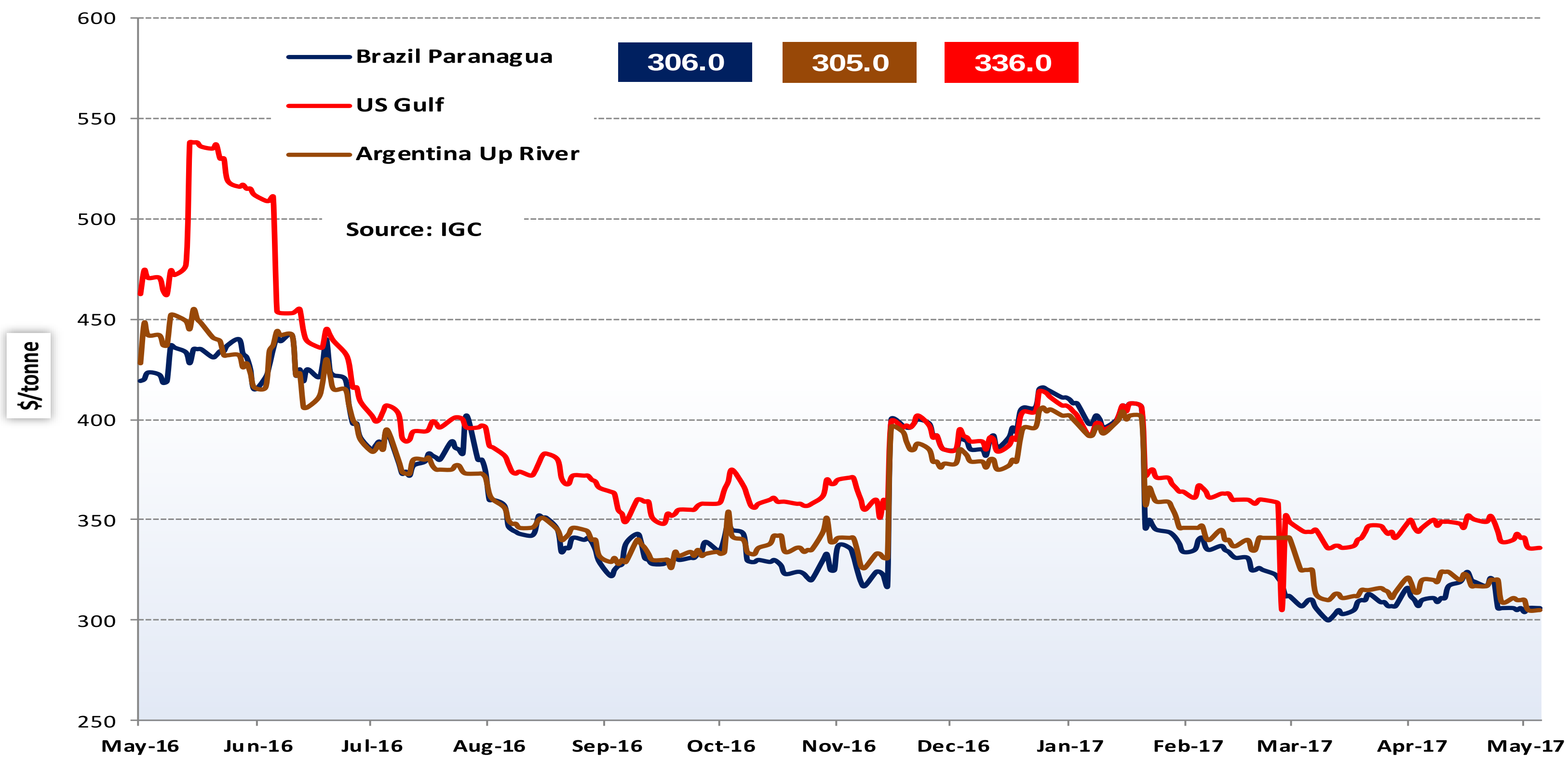


European Commission

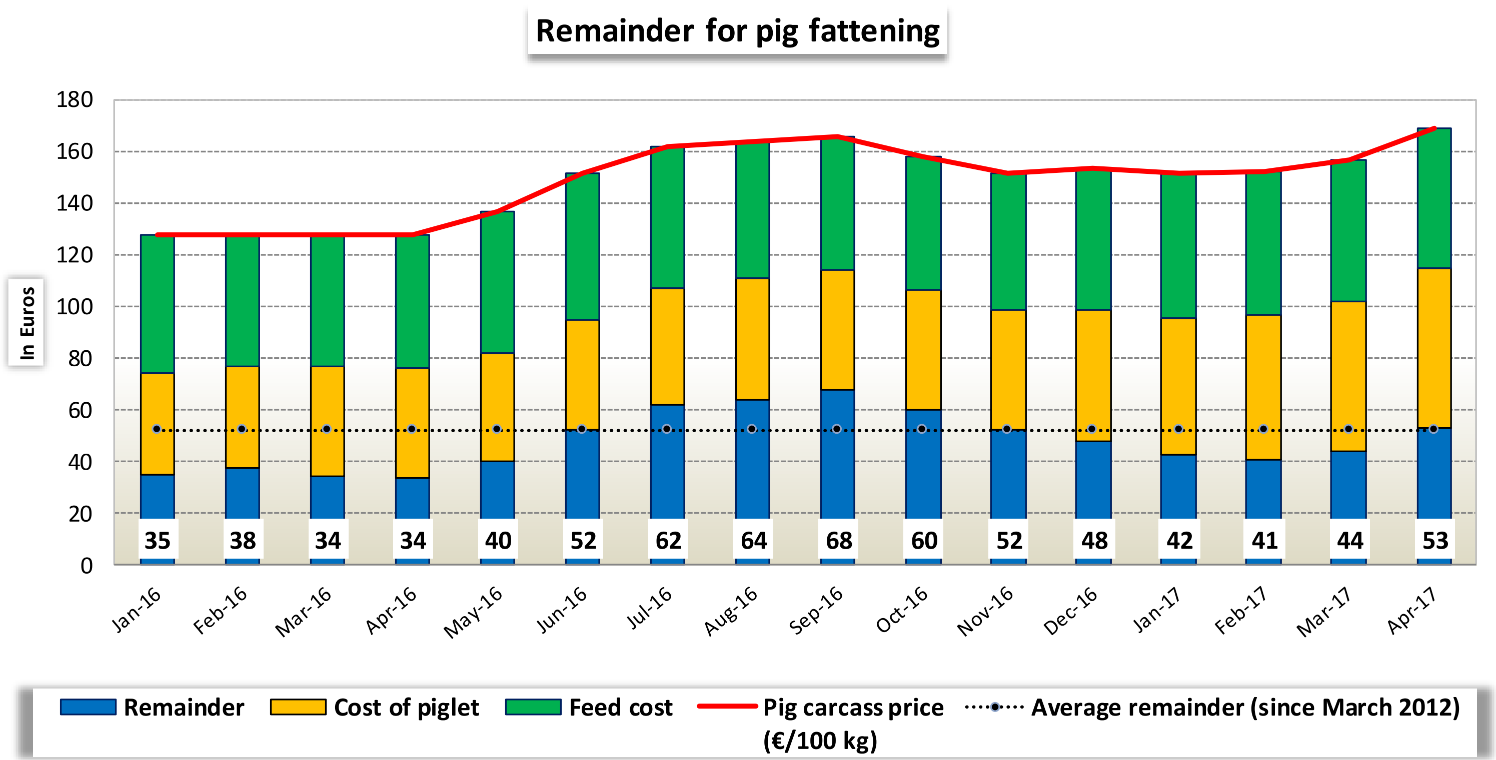
Soyabeans export prices $/ton (fob)



Soyameal world quotations $/ton



European Commission



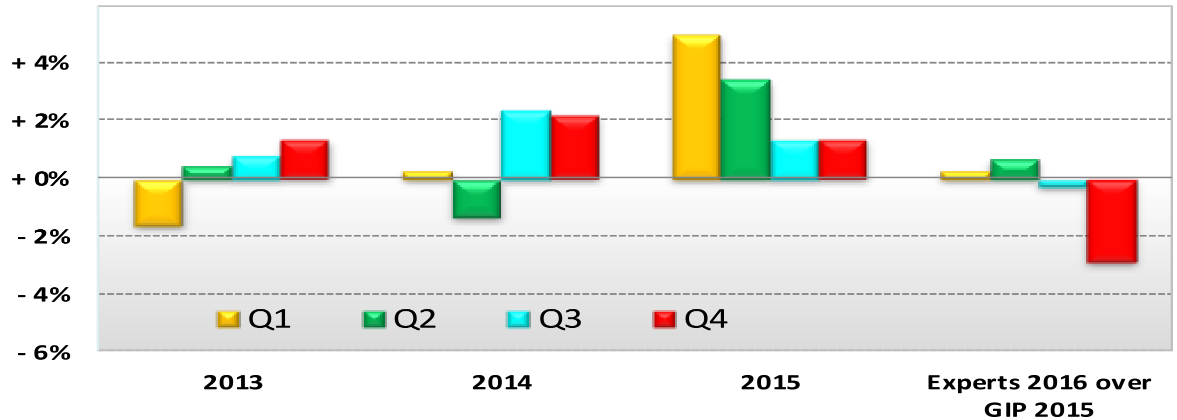
European Commission

Production

Agriculture and Rural Development

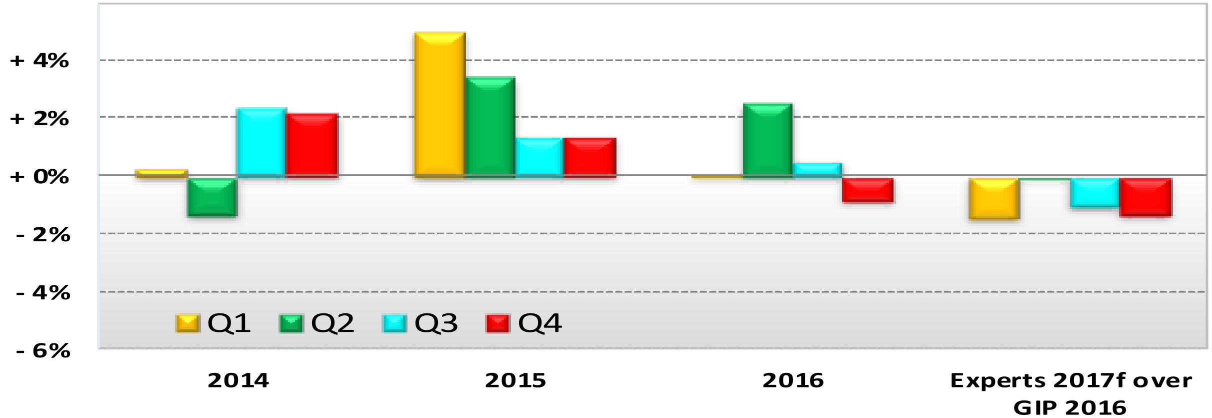
European Commission

Change in EU pigmeat slaughter (2016 forecast based on GIP and experts estimations)



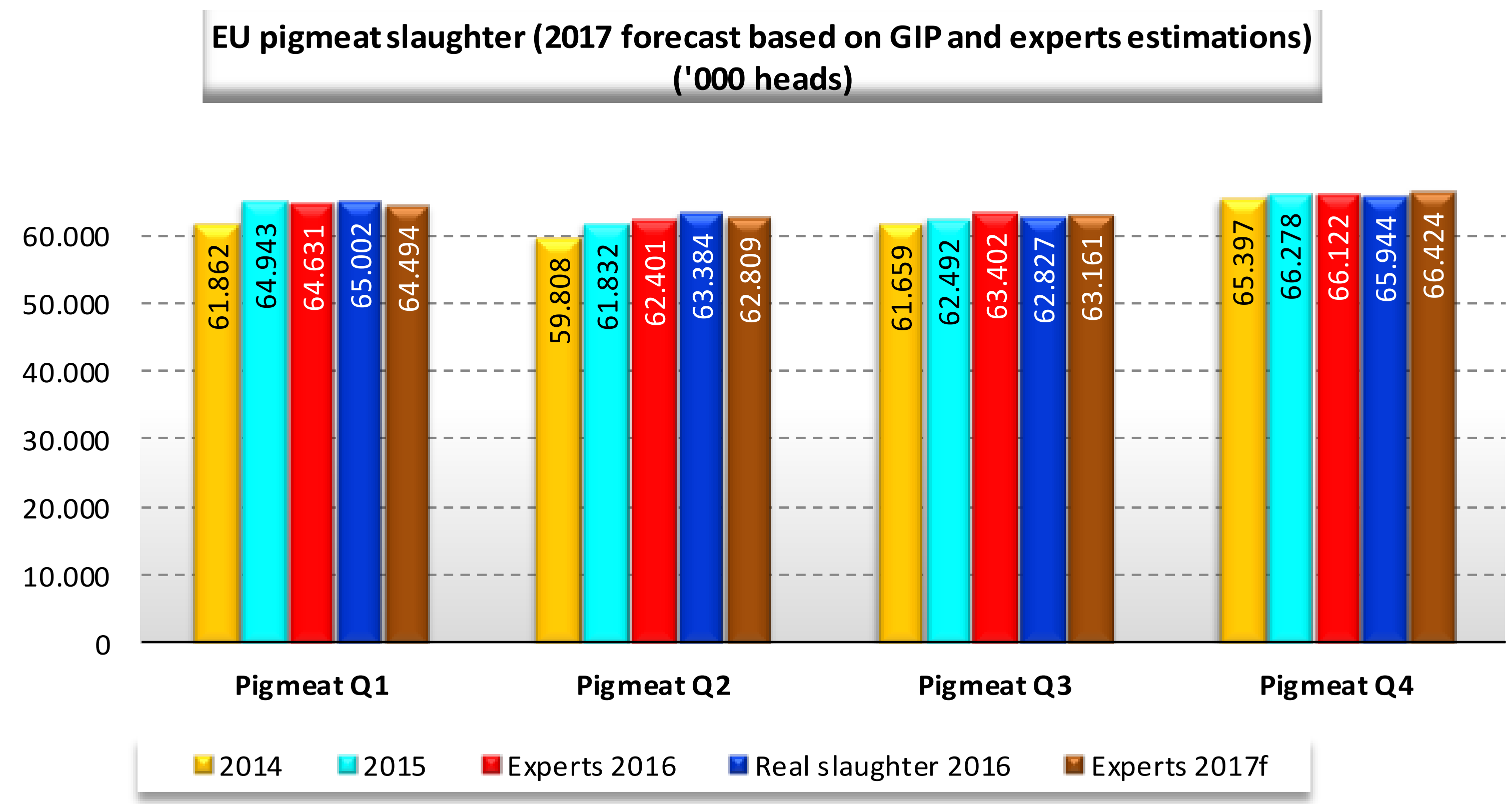
	2013	2014	2015	R.Slaughter 2016 / R.Slaughter 2015	Experts GIP 2016 / GIP 2015
Q1	- 1.6%	+ 0.3%	+ 5.0%	**+ 0.1%**	**+ 0.3%**
Q2	+ 0.4%	- 1.3%	+ 3.4%	**+ 2.5%**	**+ 0.7%**
Q3	+ 0.8%	+ 2.3%	+ 1.3%	**+ 0.5%**	**- 0.3%**
Q4	+ 1.3%	+ 2.2%	+ 1.3%	**- 0.8%**	**- 2.9%**
EU_28	**+ 0.2%**	**+ 0.9%**	**+ 2.7%**	**+ 0.5%**	**- 0.6%**

Change in EU pigmeat slaughter (2017 forecast based on GIP and experts estimations)



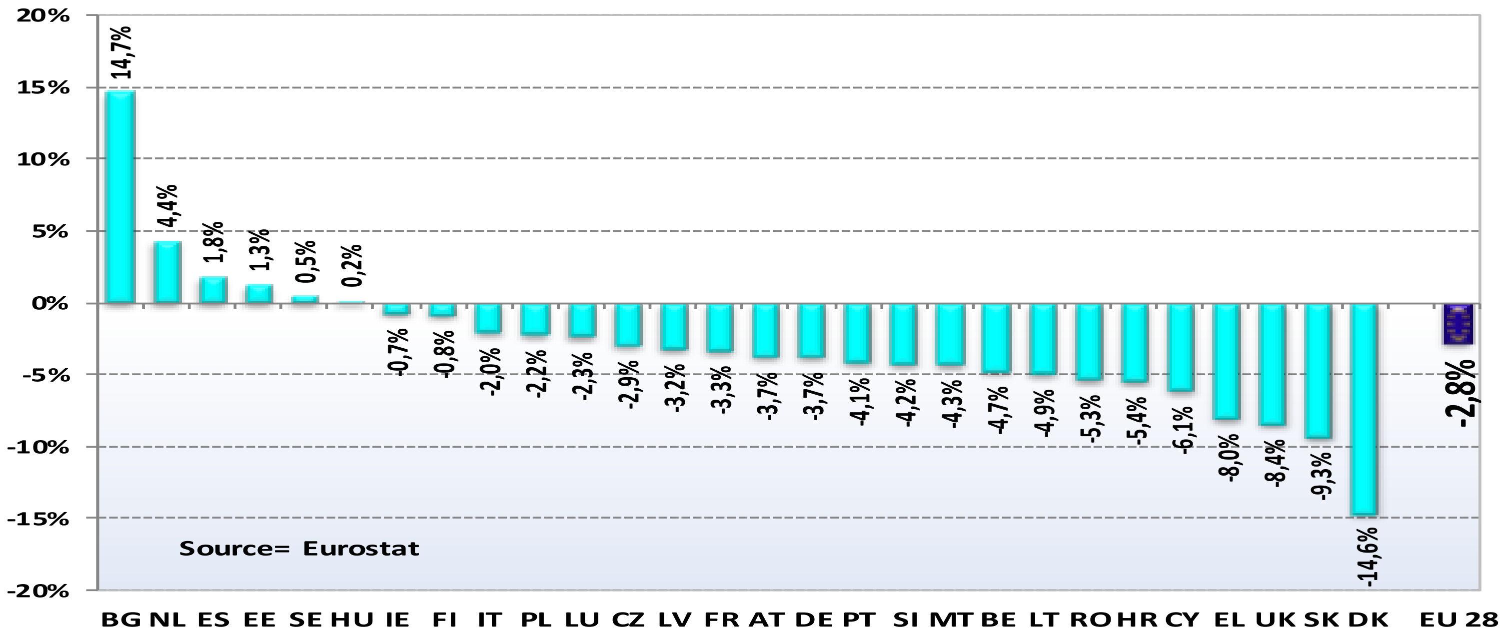
	2014	2015	2016	R.Slaughter 2017 / R.Slaughter 2016	Experts GIP 2017 / GIP 2016
Q1	+ 0.3%	+ 5.0%	+ 0.1%		- 1.4%
Q2	- 1.3%	+ 3.4%	+ 2.5%		- 0.0%
Q3	+ 2.3%	+ 1.3%	+ 0.5%		- 1.0%
Q4	+ 2.2%	+ 1.3%	- 0.8%		- 1.3%
EU_28	**+ 0.9%**	**+ 2.7%**	**+ 0.5%**		**- 1.0%**

European Commission



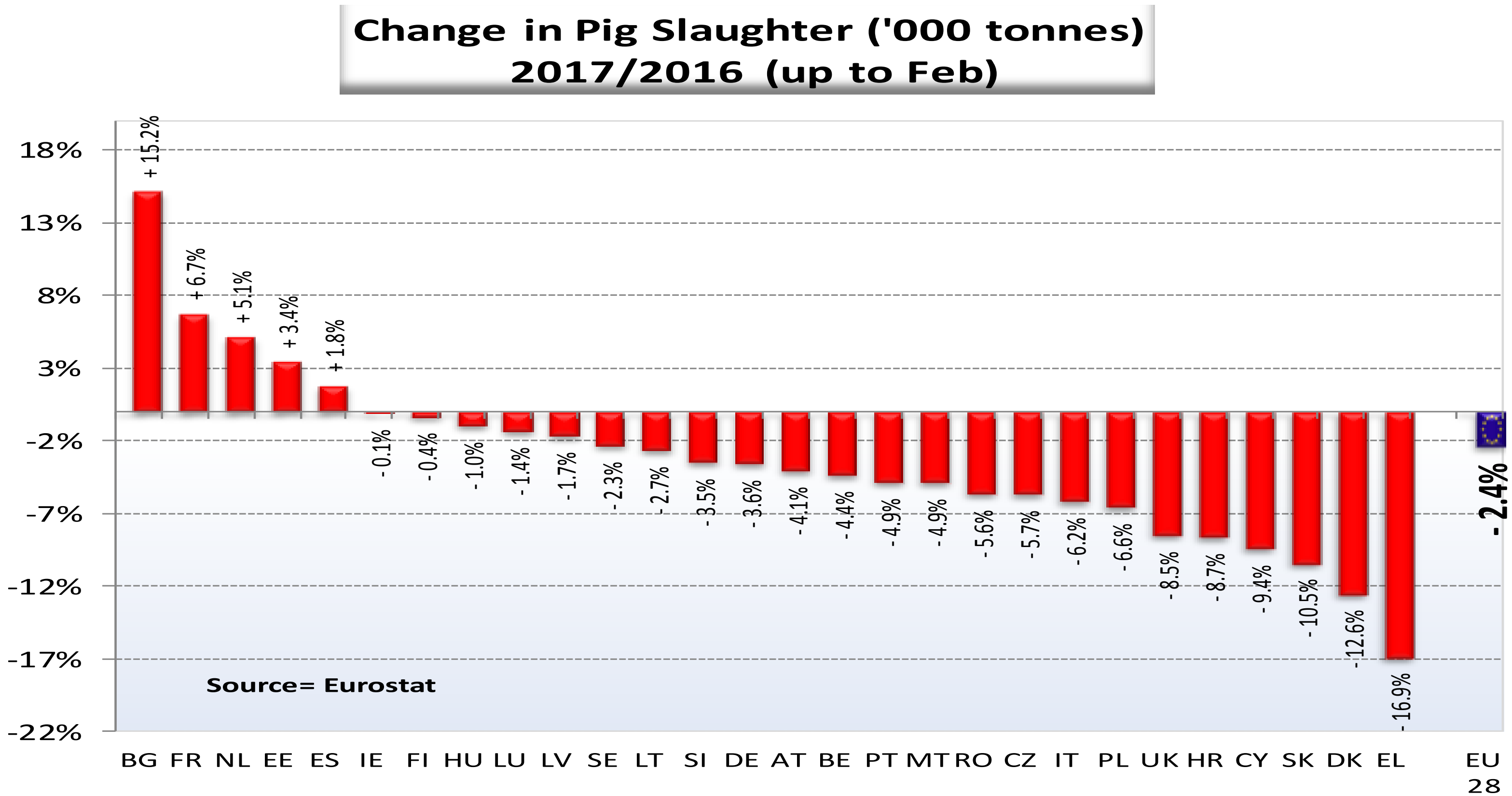
European Commission

Change in Pig Slaughter ('000 heads) 2017/2016 (up to Feb)



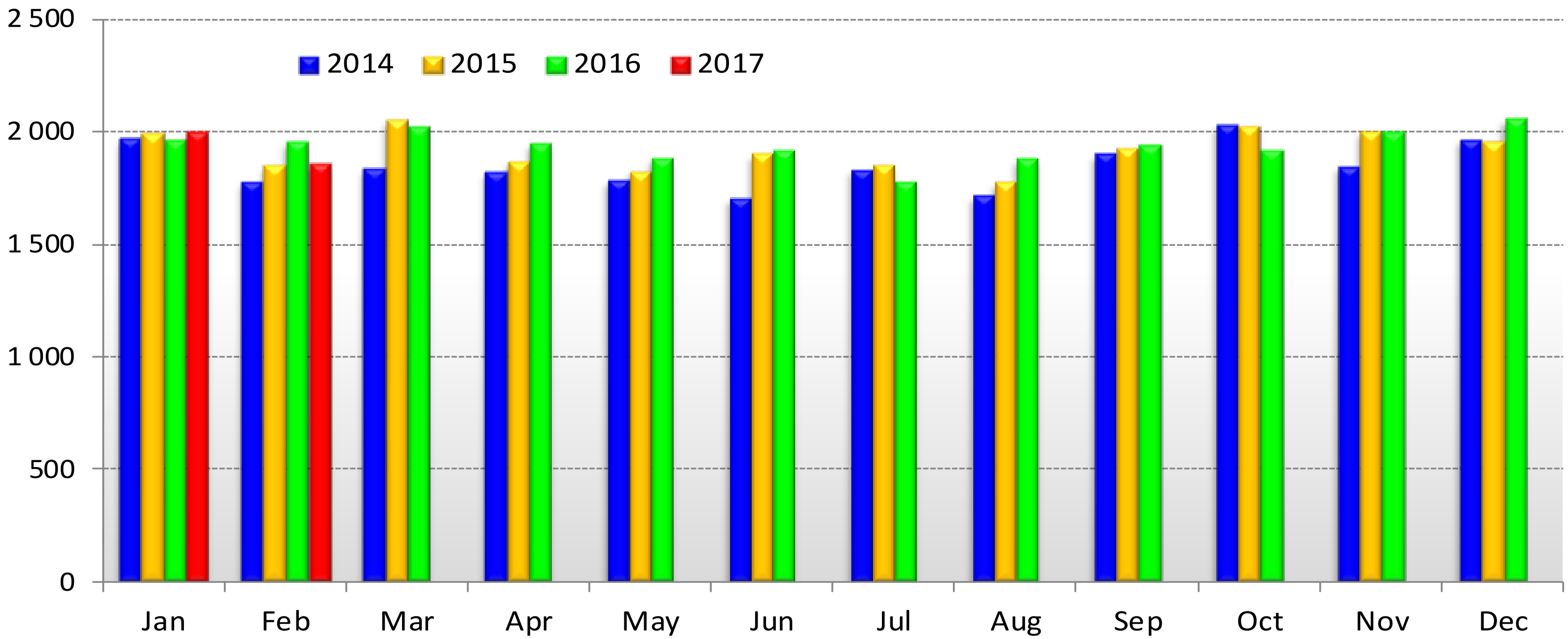
PRODUCTION

IN TONNES



European Commission

Pig Production (E28 Slaughtering) - Tonnes



Source - Estat-Newcronos

European Commission

Prices

Agriculture and Rural Development

European Commission

EU Prices

EU Prices	22		Evolution since last week	Evolution since last month	Evolution since last year
Average (S-E)	176.4	€/100 kg carcass weight	+ 0.1%	+ 1.5%	+ 19.9%
Class S	176.8	€/100 kg carcass weight	+ 0.1%	+ 1.3%	+ 19.5%
Class E	175.9	€/100 kg carcass weight	+ 0.2%	+ 1.8%	+ 20.6%
Piglet	58.7	€/head	- 0.7%	- 1.4%	+ 42.9%

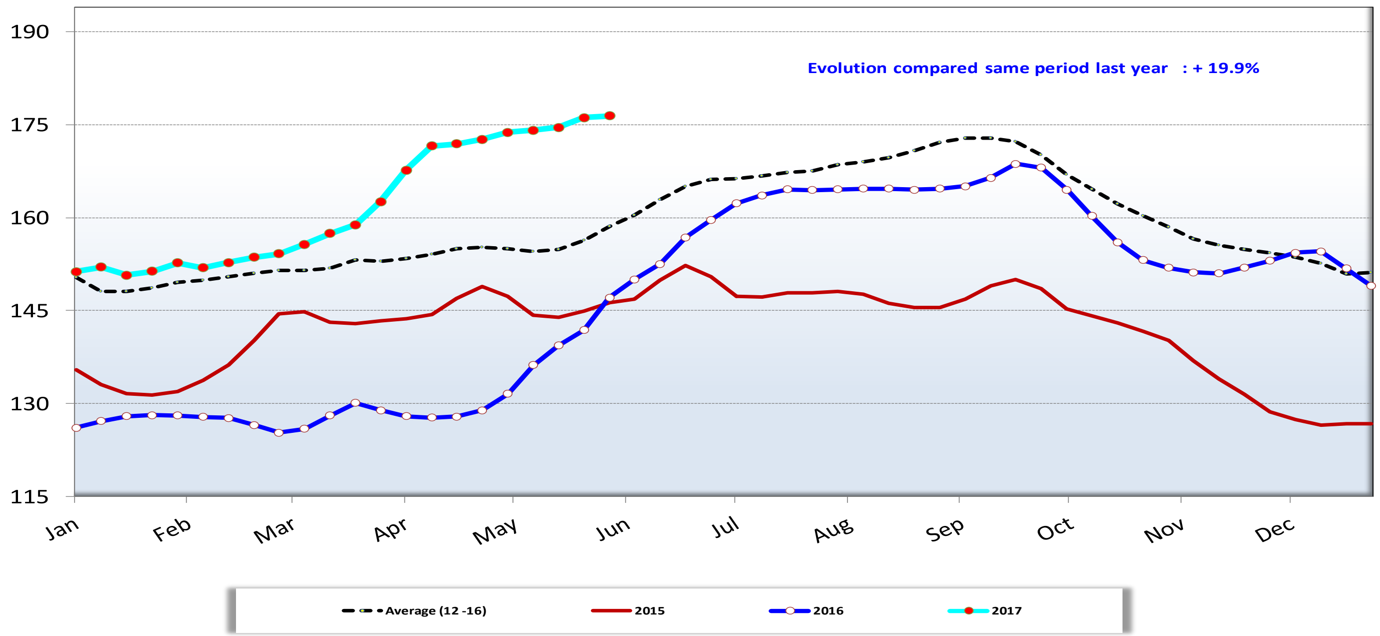
PRICES CARCASES

EU EVOLUTION AVERAGE CLASSES S & E

European Commission

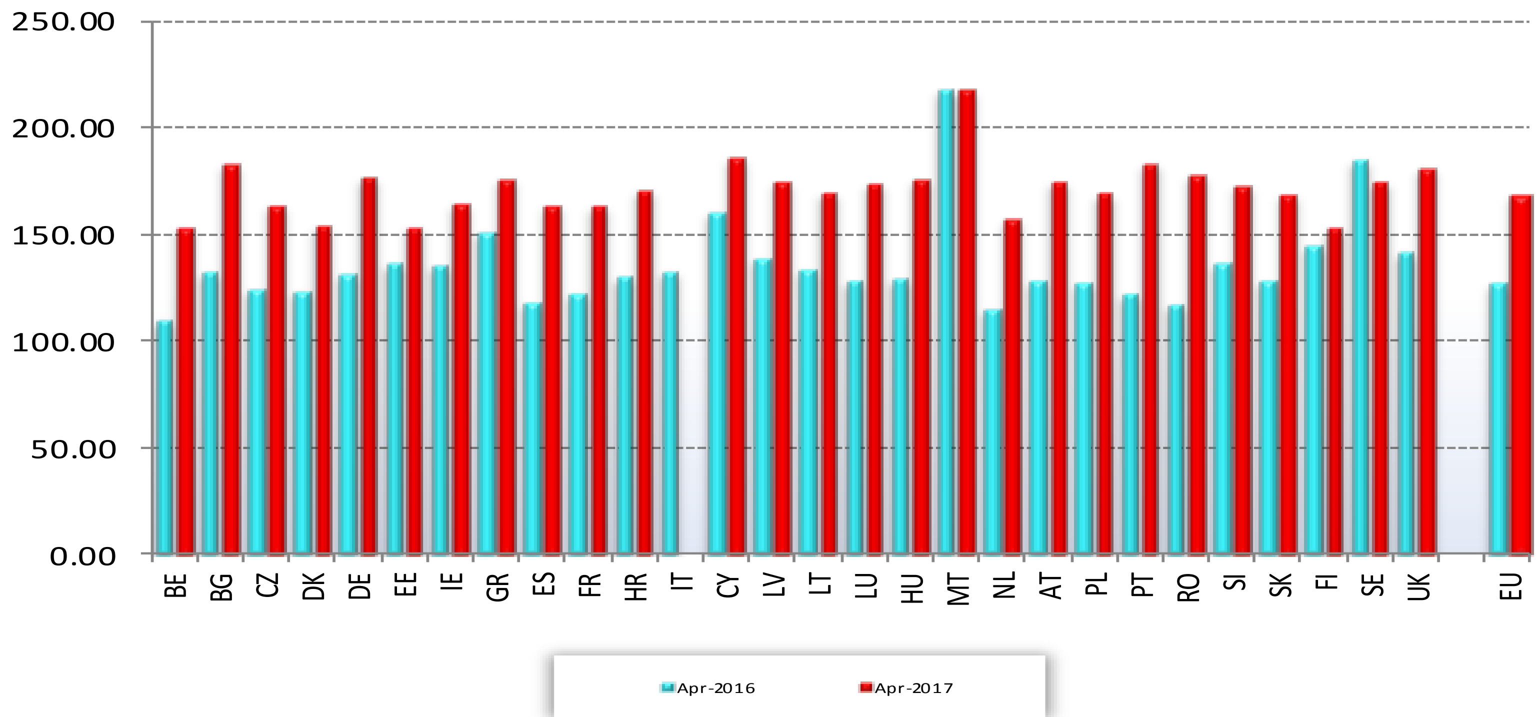
EU evolution of the EU pig carcase prices
(€/ 100kg/cw)

Latest price ==> 176.41 EUR/100 kg/cw

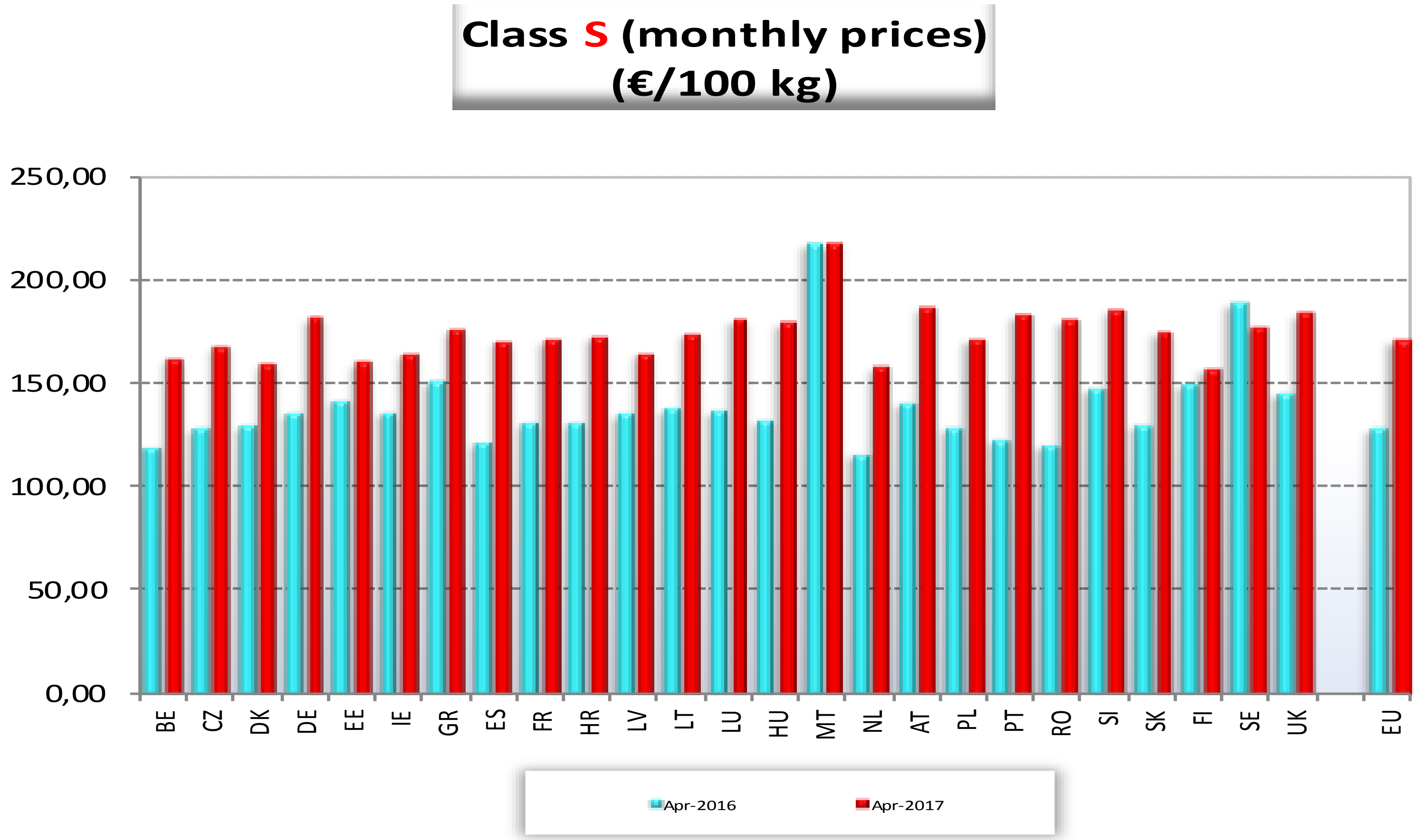


European Commission

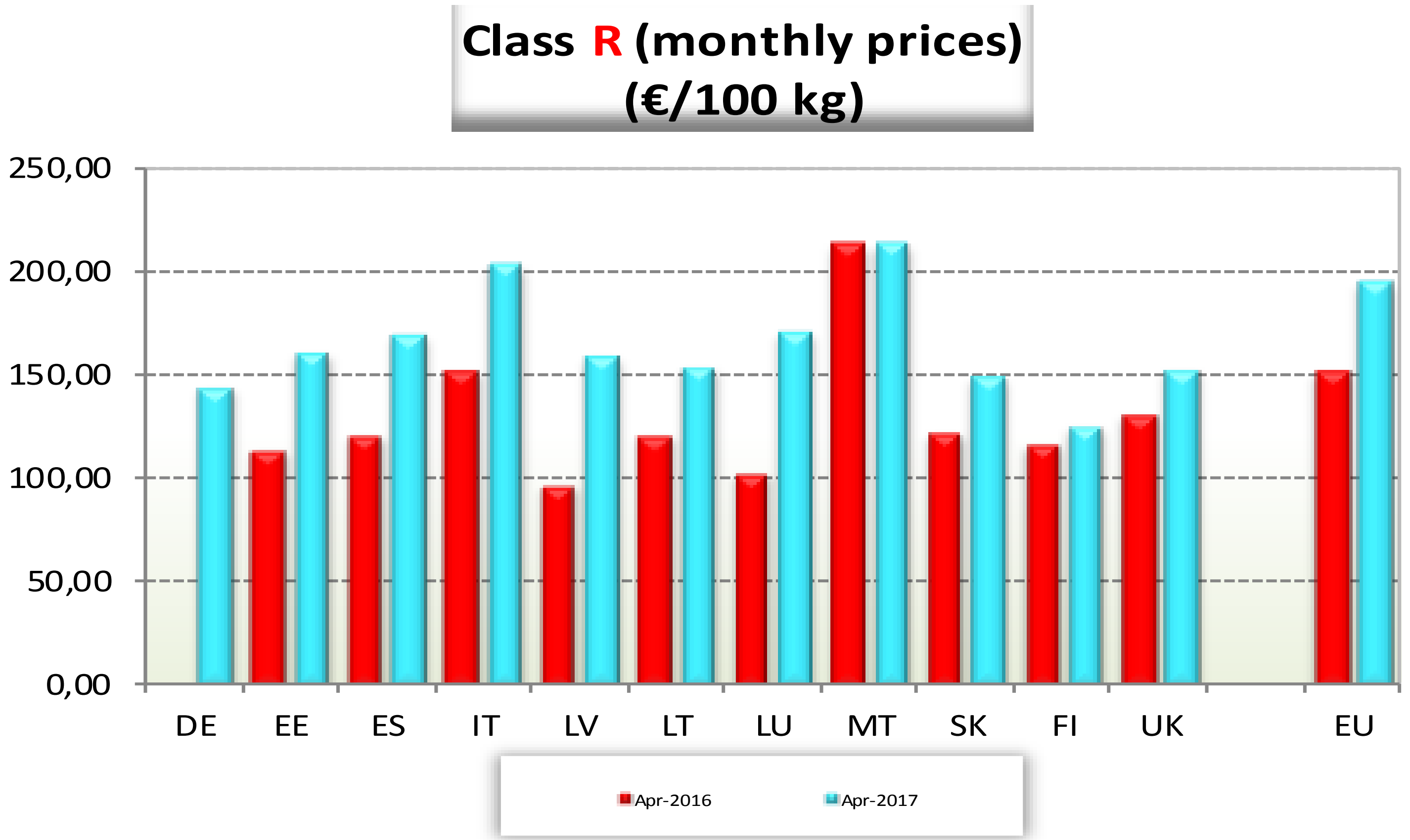
Class E (monthly prices) (€/100 kg)



European Commission



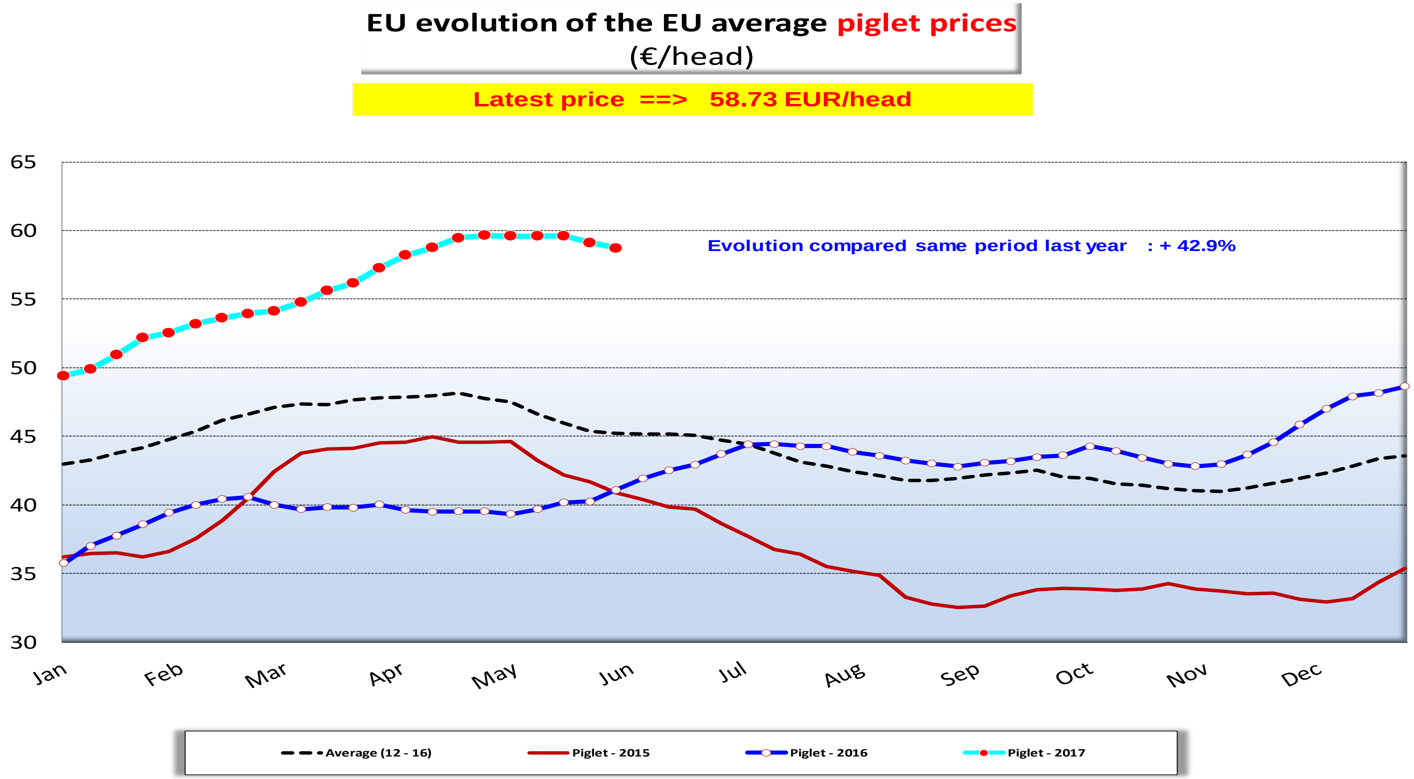
European Commission



PRICES PIGLETS

EU EVOLUTION

European Commission

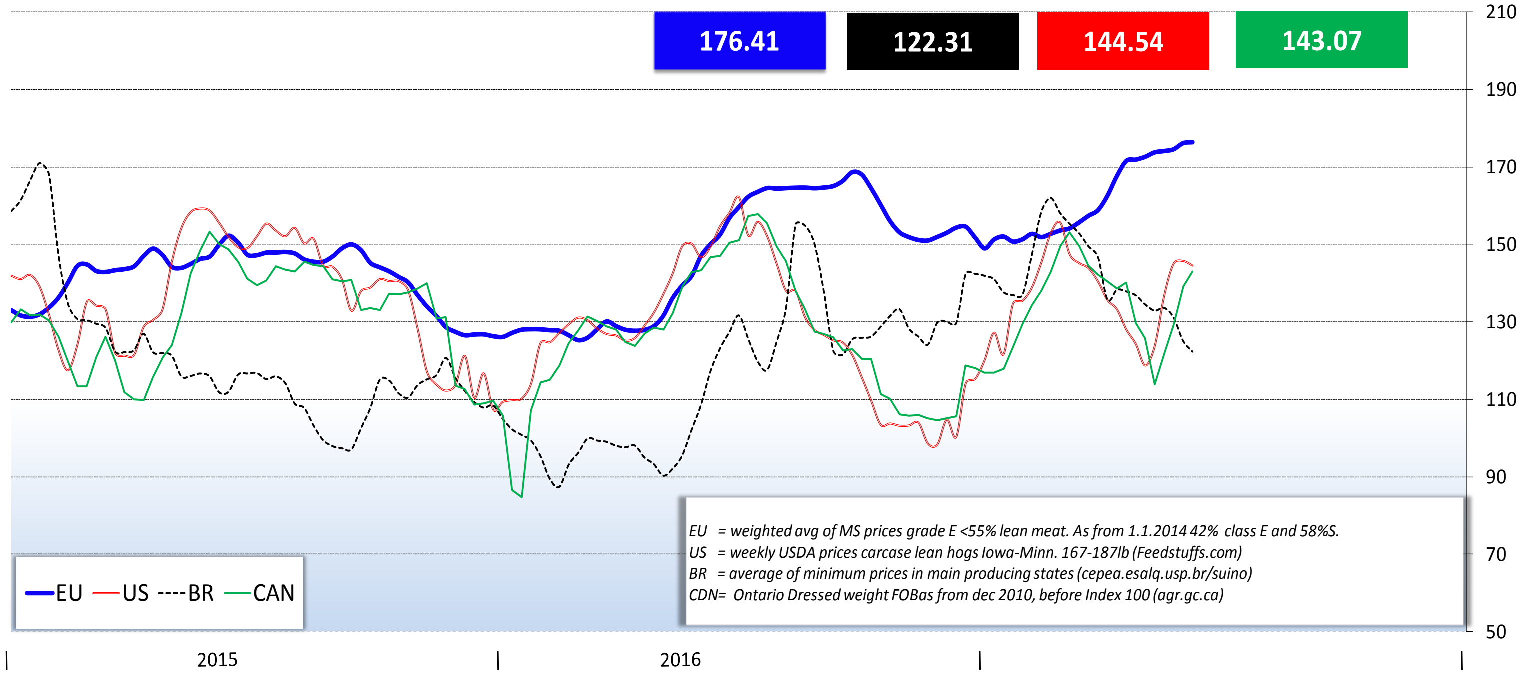


WORLD PIG MARKET

PIG PRICES EU, BR, CAN, US

European Commission

World weekly average Pig prices 2015 - 2017 in Euro/ 100kg carcase (EU, Brazil, Canada and USA)



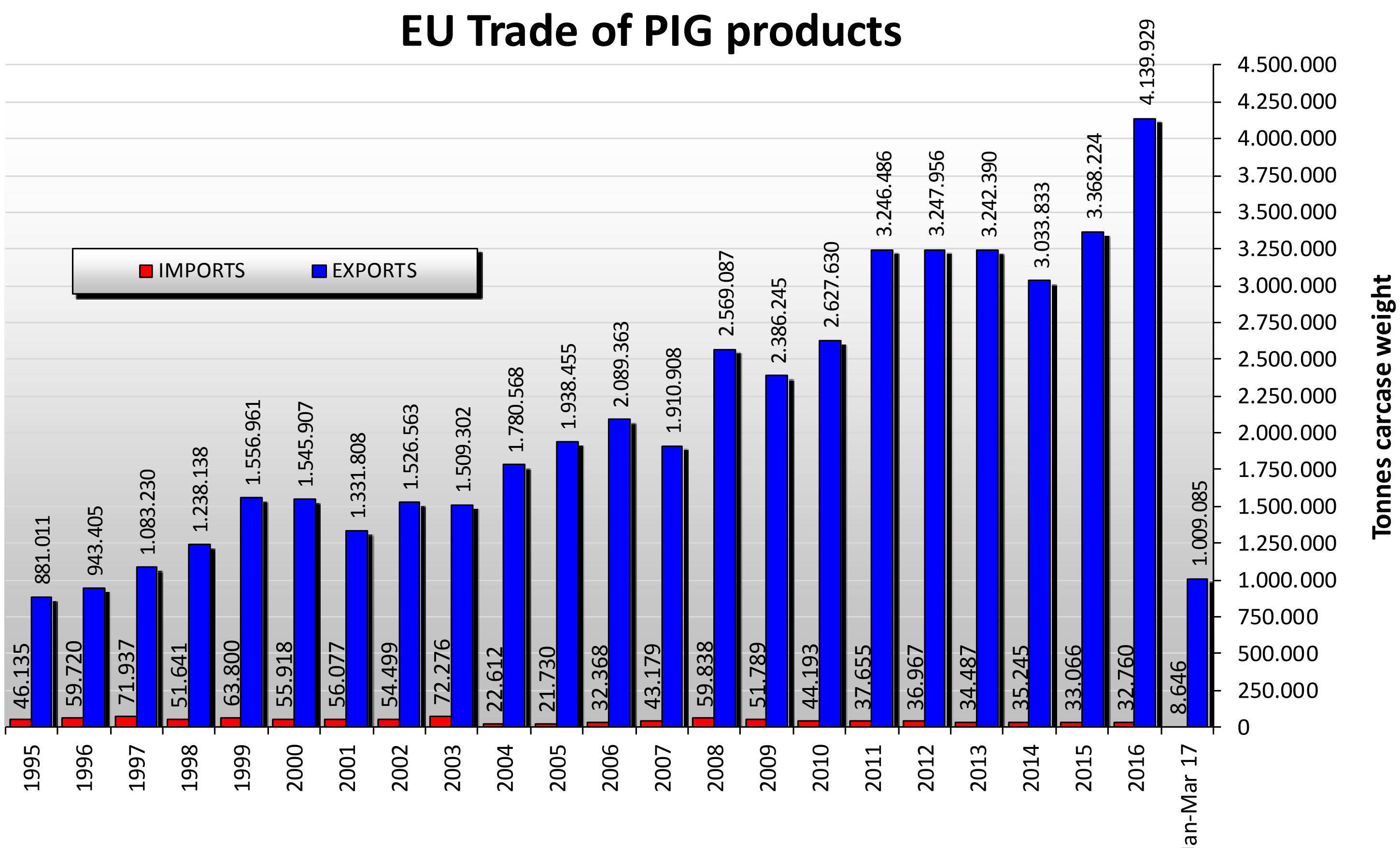
European Commission

Trade

Agriculture and Rural Development

European Commission

EU trade of PIG products



European Commission

EU imports of selected PIG products

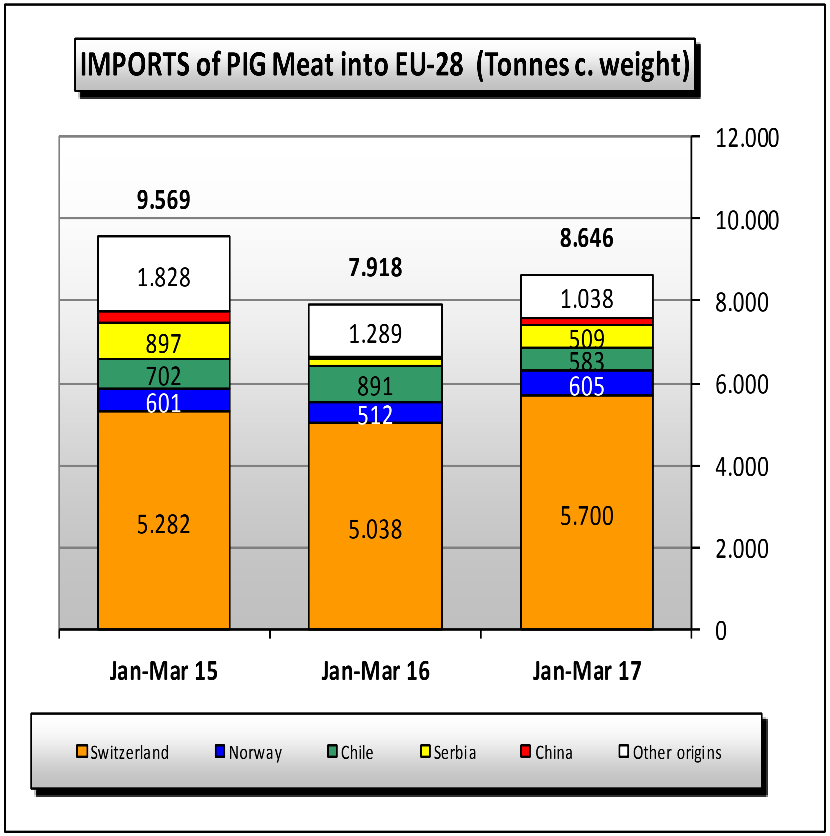
Trade figures (COMEXT – tonnes carcass weight)

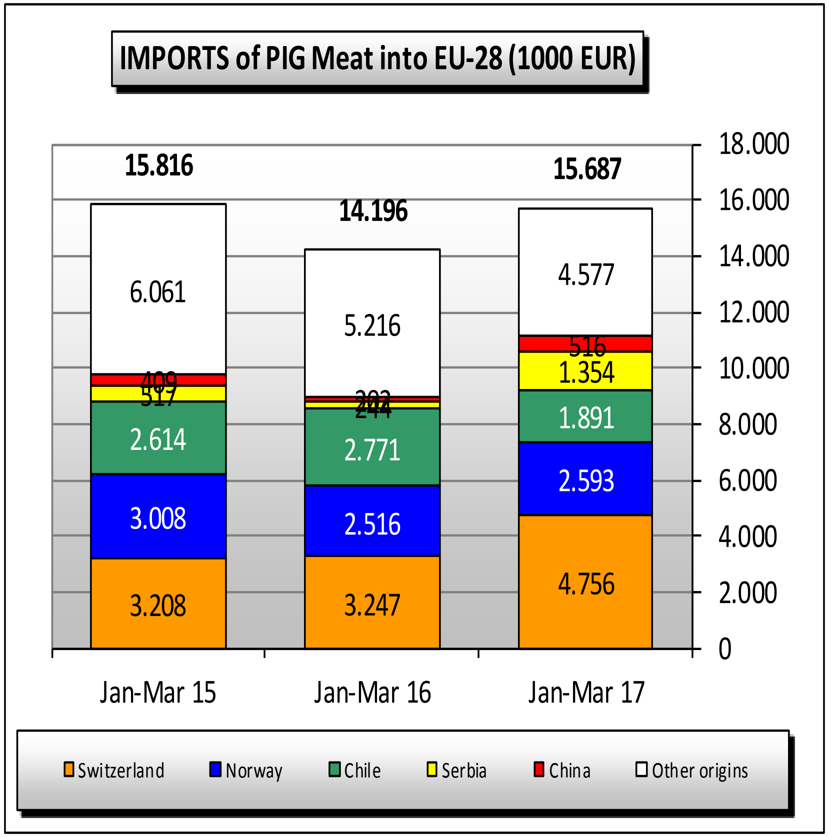
IMPORT

	2013		2014		2015		2016		Jan-Mar 17		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Mar 16
Switzerland	17.399	50%	18.207	52%	20.225	61%	22.257	68%	5.700	66%	13%
Norway	2.202	6%	3.192	9%	2.315	7%	1.965	6%	605	7%	18%
Chile	6.432	19%	3.416	10%	2.896	9%	2.958	9%	583	7%	-34%
Serbia	3.064	9%	3.662	10%	1.819	5%	614	2%	509	6%	+++
Other	5.390	16%	6.768	19%	5.812	18%	4.966	15%	1.249	14%	
Extra-EU	34.487		35.245		33.066		32.760		8.646		
% change			+ 2%		- 6%		- 1%		+ 9,2%		

European Commission

EU imports of selected PIG products
Trade figures (COMEXT – tonnes carcass weight)

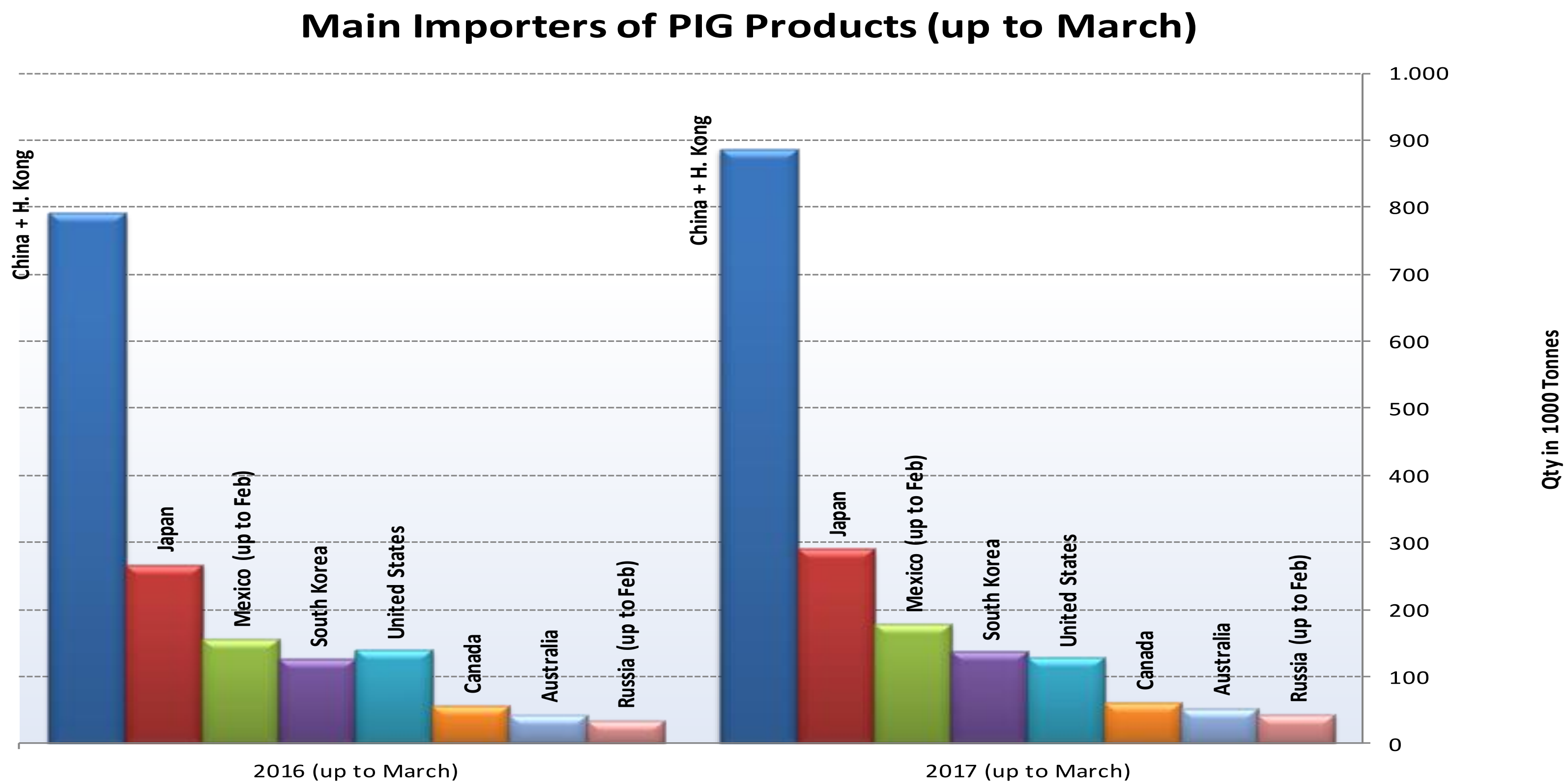




WORLD PIG MARKET

PIG MAIN IMPORTERS

European Commission



Source : GTA

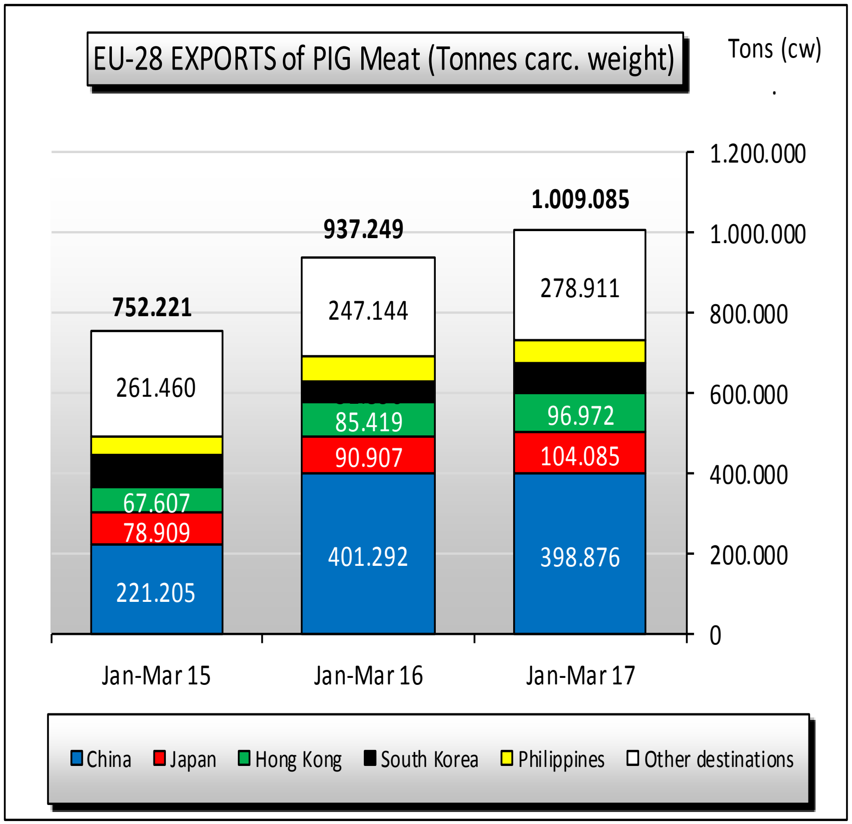
Excl. Live animals

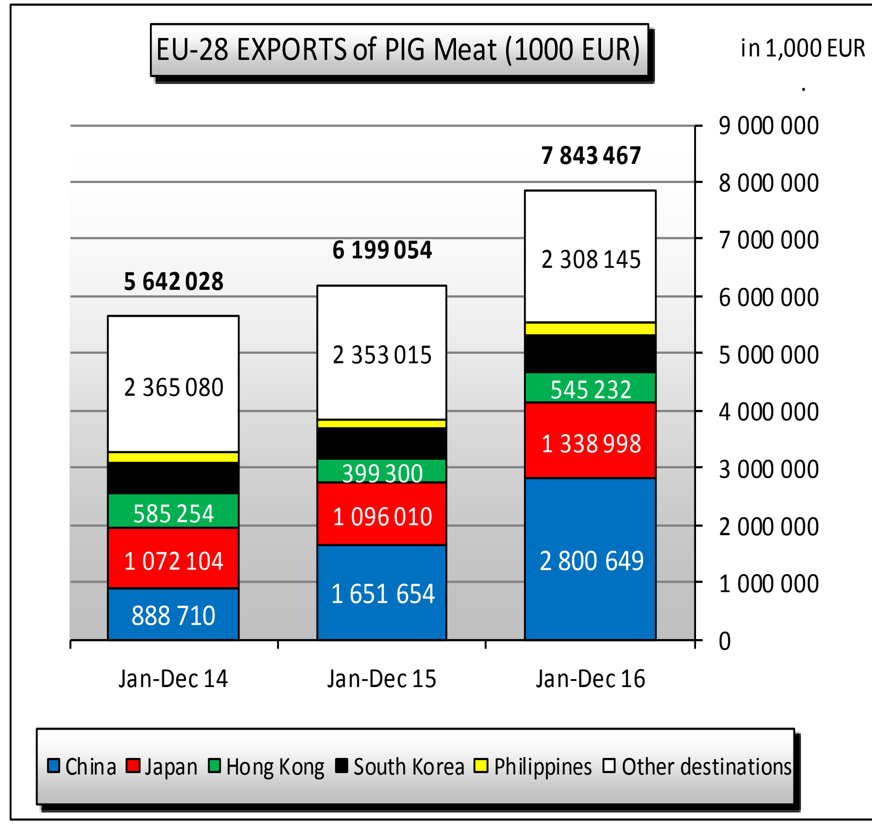
European Commission

EU exports of selected PIG products:
Trade figures (COMEXT – tonnes carcass weight)

	2013		2014		2015		2016		Jan-Mar 17		Compared to
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	Jan-Mar 16
China	668.386	20,6%	717.033	23,6%	1.141.306	33,9%	1.859.900	44,9%	398.876	39,5%	- 1%
Japan	261.324	8,1%	347.721	11,5%	364.746	10,8%	399.484	9,6%	104.085	10,3%	+ 14%
Hong Kong	388.049	12,0%	408.183	13,5%	292.372	8,7%	362.288	8,8%	96.972	9,6%	+ 14%
South Korea	108.482	3,3%	227.825	7,5%	241.568	7,2%	259.220	6,3%	73.897	7,3%	+ 42%
Philippines	102.348	3,2%	202.522	6,7%	191.876	5,7%	215.696	5,2%	56.343	5,6%	- 7%
USA	64.710	2,0%	90.985	3,0%	105.123	3,1%	116.122	2,8%	38.174	3,8%	+ 23%
Australia	51.467	1,6%	73.156	2,4%	102.645	3,0%	99.832	2,4%	28.930	2,9%	+ 19%
Ukraine	125.540	3,9%	106.780	3,5%	96.631	2,9%	75.759	1,8%	16.859	1,7%	- 17%
Taiw an	11.540	0,4%	52.970	1,7%	53.701	1,6%	47.888	1,2%	15.850	1,6%	+ 36%
Vietnam	3.269	0,1%	16.056	0,5%	38.290	1,1%	53.559	1,3%	15.256	1,5%	- 7%
Serbia	28.336	0,9%	62.905	2,1%	47.488	1,4%	41.164	1,0%	12.106	1,2%	+ 58%
Ivory Coast	35.107	1,1%	39.773	1,3%	49.766	1,5%	36.473	0,9%	10.283	1,0%	+ 7%
Other	1.393.832	43,0%	687.924	22,7%	642.711	19,1%	572.543	13,8%	*141.454*	14,0%	
Extra-EU	3.242.390		3.033.833		3.368.224		4.139.929		1.009.085		
% change			- 6%		+ 11%		+ 23%		+ 7,7%		

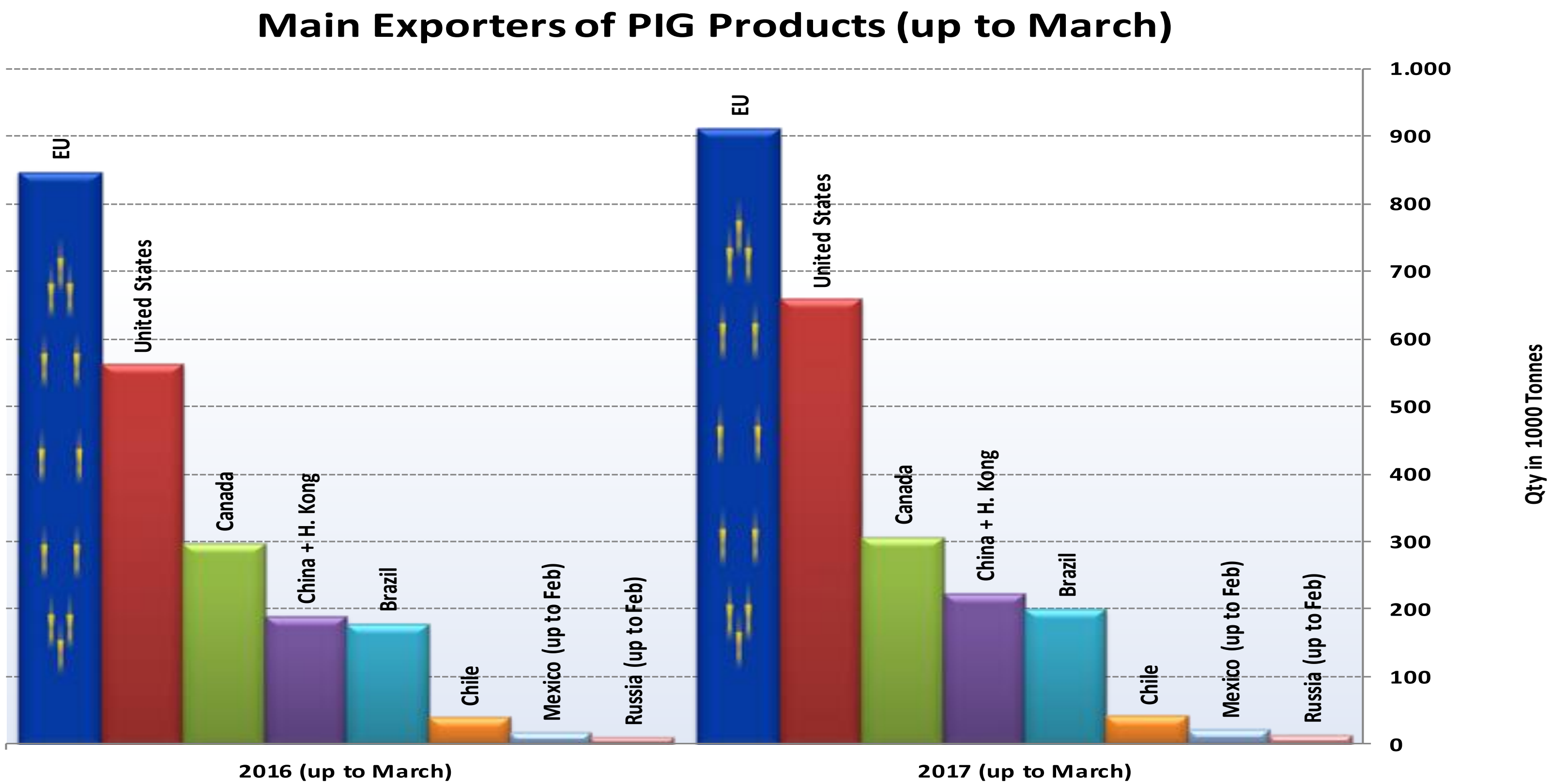
EU exports of selected PIG products
Trade figures (COMEXT – tonnes carcass weight)





PIG MAIN EXPORTERS

European Commission



Source : GTA

Excl. Live animals

EU27 Trade with UK

(Eurostat COMEXT database)

TRADE EU27 – UK

SHARE OF EU27 EXPORTS

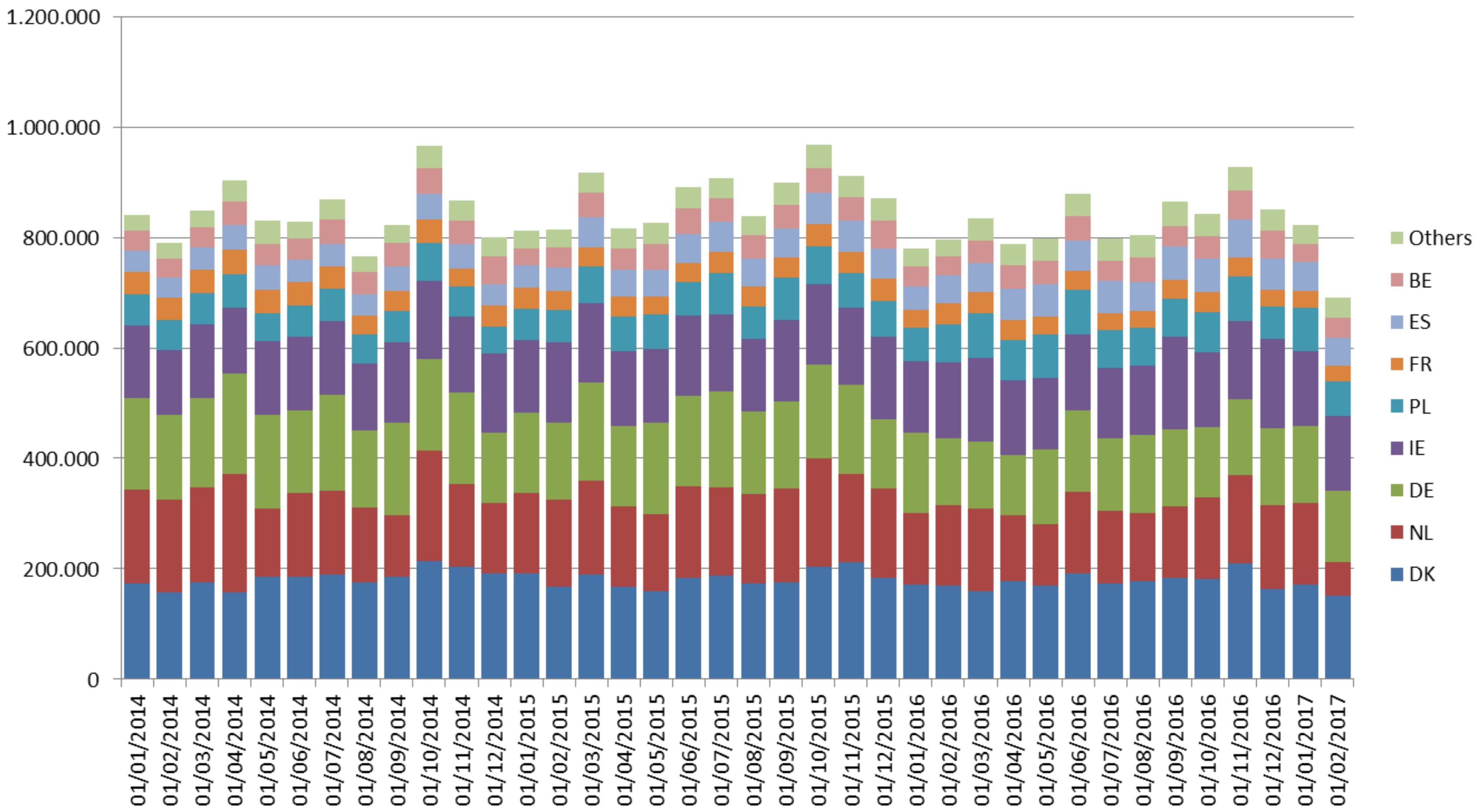
European Commission

SHARE OF TOTAL EXPORTS EU27 MEMBER STATES	EXPORTS TO EU27	EXTRA EU	UNITED KINGDOM
DE	67,87%	26,52%	5,62%
DK	59,28%	29,48%	11,23%
ES	65,61%	31,07%	3,32%
NL	67,42%	21,67%	10,91%
BE	85,33%	9,62%	5,05%
FR	64,67%	29,66%	5,67%
PL	63,80%	25,60%	10,60%
IT	66,74%	26,32%	6,94%
AT	82,68%	16,05%	1,26%
IE	16,38%	29,58%	54,05%
HU	60,48%	38,49%	1,04%
CZ	97,67%	1,66%	0,67%
PT	49,77%	47,02%	3,22%
SK	99,49%	0,41%	0,10%
SE	73,63%	23,64%	2,73%
LT	82,56%	14,03%	3,41%
RO	79,66%	13,82%	6,53%
FI	52,10%	47,09%	0,81%
HR	55,11%	44,82%	0,07%
EE	94,52%	5,42%	0,06%
SI	44,45%	55,48%	0,07%
LV	93,86%	4,64%	1,50%
EL	64,68%	34,43%	0,90%
LU	99,88%	0,12%	0,00%
BG	74,00%	14,52%	11,48%
CY	32,89%	66,72%	0,39%
MT	73,33%	0,00%	26,67%
Total	**66,57%**	**25,59%**	**7,84%**

T R A D E EU27 – UK

EVOLUTION OF EU27 E X P O R T S TO UK (quantity in 100 kg)

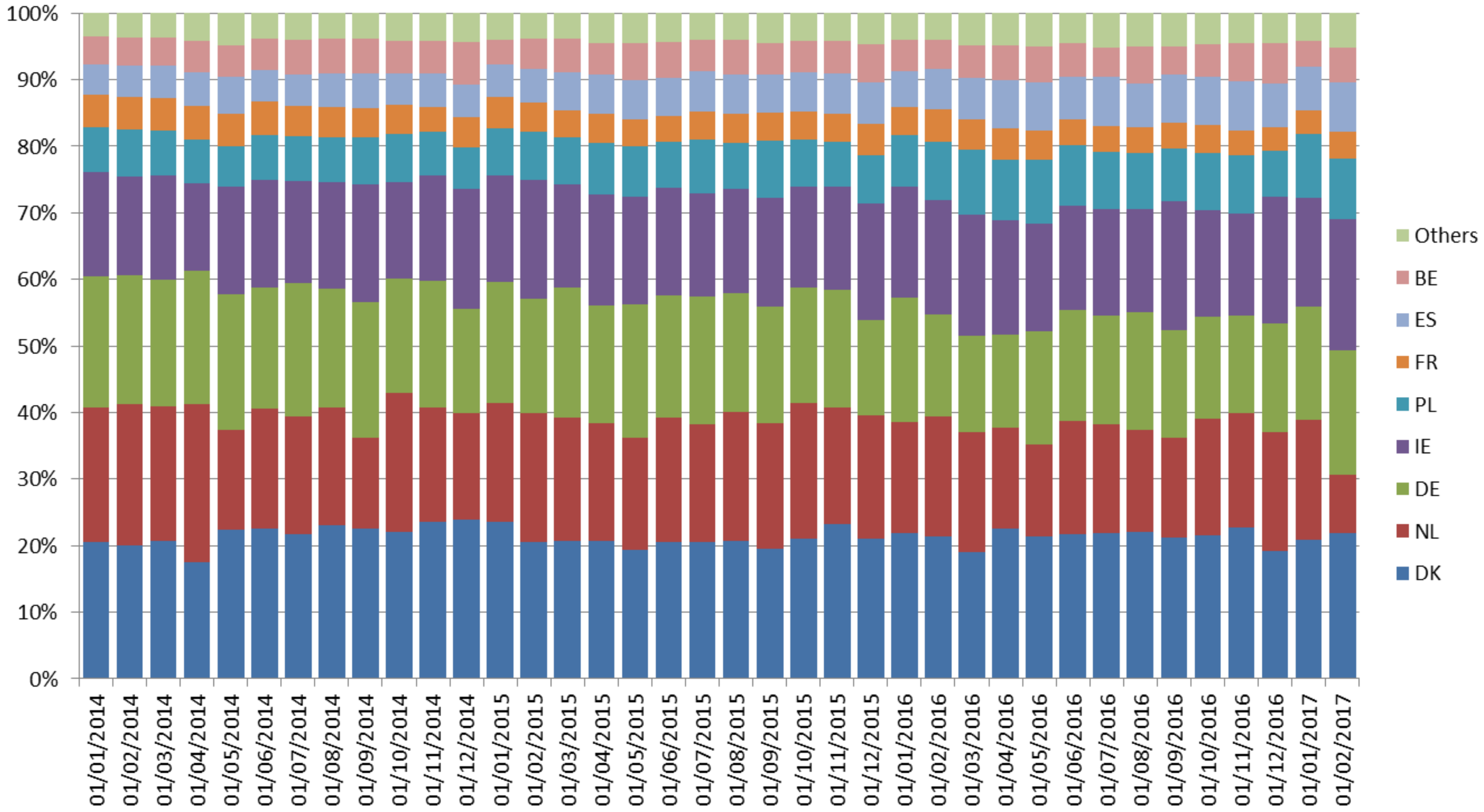
European Commission



T R A D E EU27 – UK

EVOLUTION OF EU27 E X P O R T S TO UK

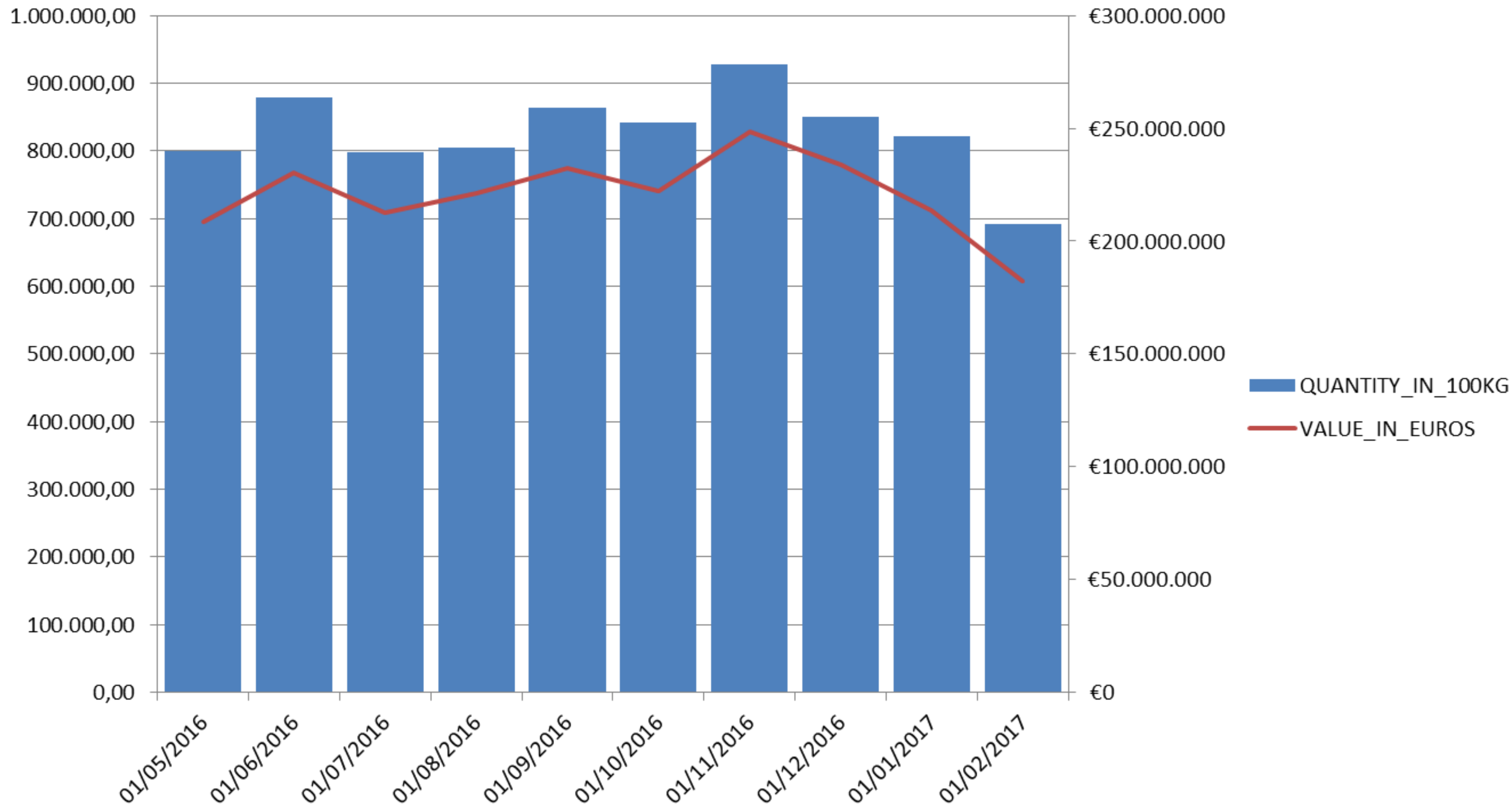
European Commission



T R A D E EU27 – UK

EVOLUTION OF EU27 E X P O R T S TO UK (Quantity in 100kg & Value in EUR/100 kg)

European Commission



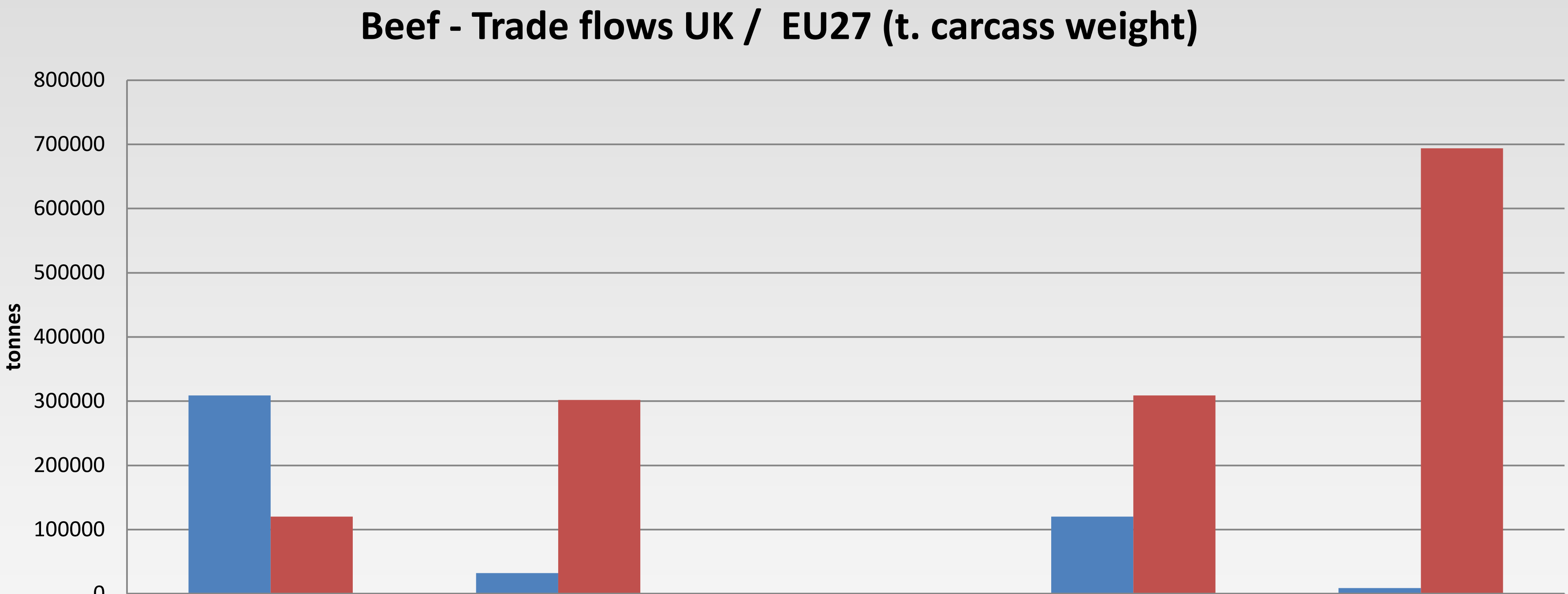
European Commission

Follow market updates via the Meat Market Observatory

http://ec.europa.eu/agriculture/market-observatory/meat/index_en.htm > Pigmeat

Annex III

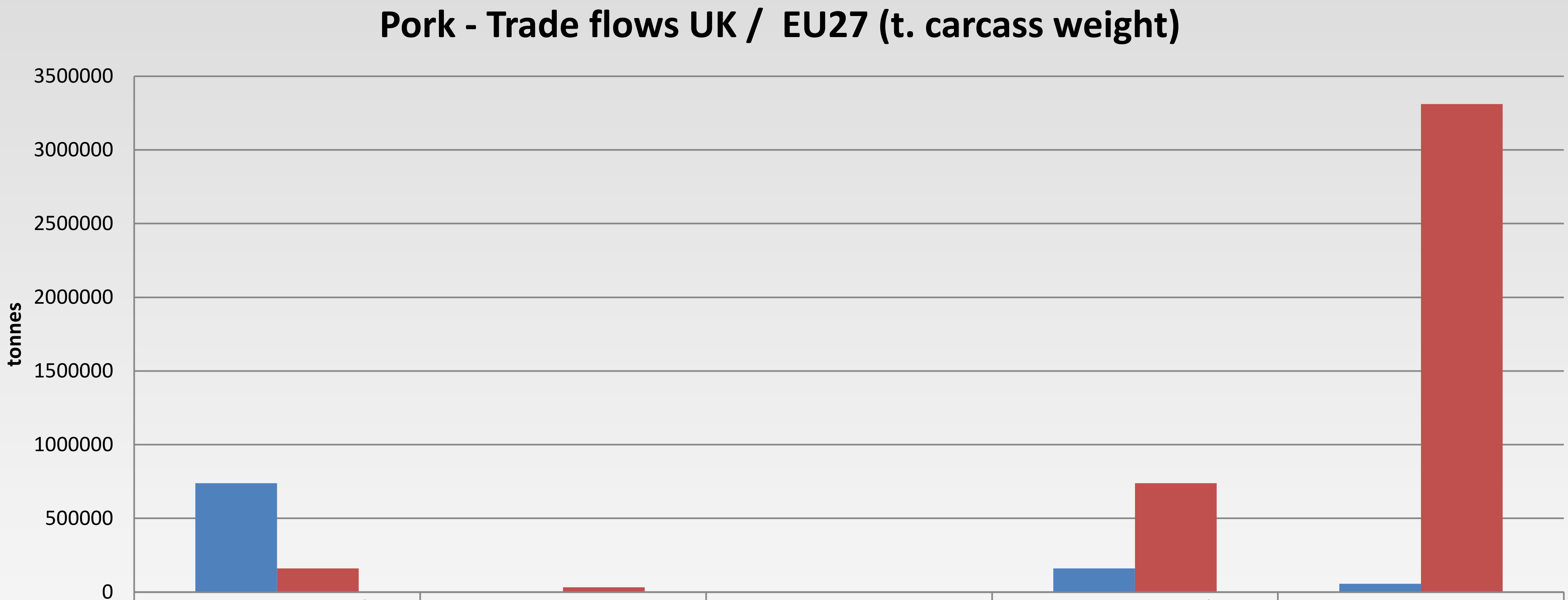
Trade flows – Beef



	Purchases from EU27/UK	Imports		Deliveries to EU27/UK	Exports
UK	309000	32000		120000	9000
EU27	120000	301942		309000	693874

- Main partners for UK imports: Brazil, Uruguay, Argentina.
- Main EU partners for UK deliveries: Ireland, The Netherlands, France, Italy, Belgium.
- Main partners for UK exports: Turkey, Hong Kong, Lebanon.
- Main EU partners for UK purchases: Ireland, The Netherlands, Poland, Germany.

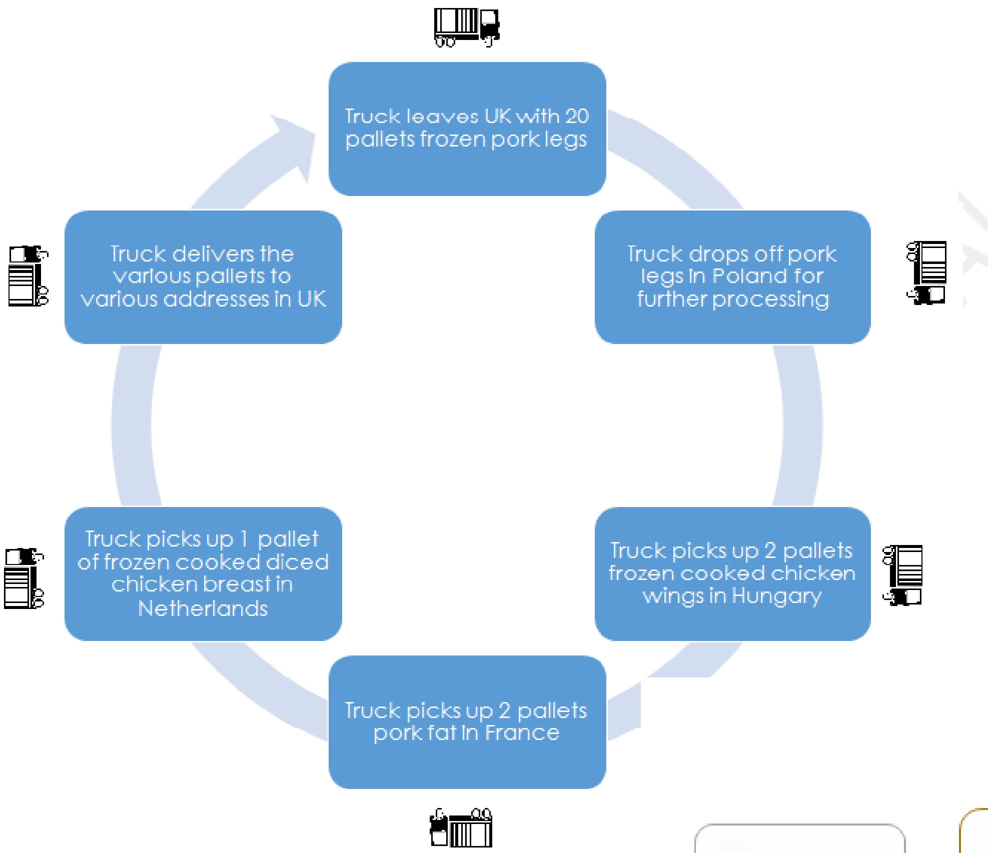
Trade flows – Pork

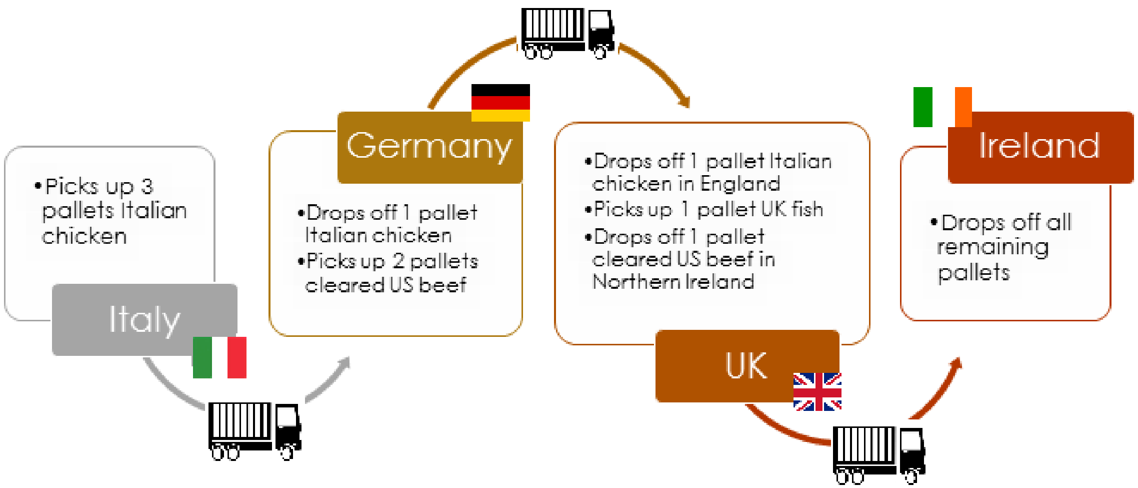


	Purchases from EU27/UK	Imports		Deliveries to EU27/UK	Exports
UK	739000	1000		160000	57000
EU27	160000	32756		739000	3311000

- Main partners for UK exports: China, Hong Kong, Japan.
- Main EU partners for UK deliveries: Germany, Ireland, Denmark, The Netherlands.
- Main EU partners for UK purchases: Denmark; Germany, The Netherlands, Belgium.

Border Formalities - Groupage





Pre/ Post-Brexit Self-sufficiency

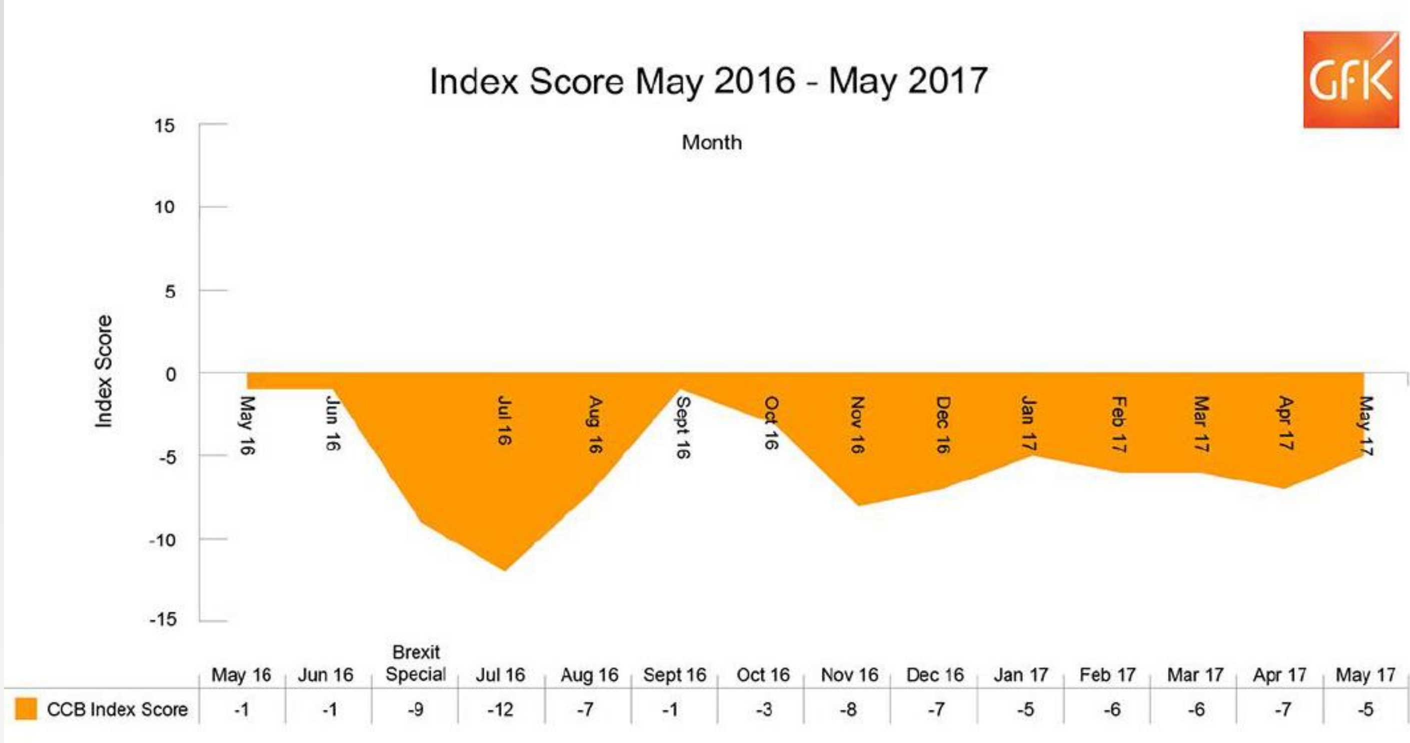
	Consumption ('000t)				Imports UK ('000t)		Self-sufficiency		
	UK	EU	UK % in the EU				UK	EU28	EU27
Beef	1,160	8,086	14%		429		76%	102%	116%
Sheep	297	943	31%		101		101%	88%	82%
Pork	1,626	20,703	8%		992		55%	112%	117%

EUR/GBP Exchange rate fluctuations

Brexit is already having effects on business.

- Sterling fell overnight by 1.5% after the last election results, like it did after previous Brexit-related events.
- Latest figures from Eurostat reveal the UK economy was the worst performer in the European Union during the first quarter of 2017 with just 0.2% growth.

Consumer confidence



Source: GfK Consumer Confidence Barometer on behalf of the European Commission (May 2017)

Brexit is already having effects on business.

- Consumer confidence at near lowest level since month after the EU referendum
- Unsecured borrowing reached record highs in May

Prices increases starting to emerge

			
Price of Unilever products up by average of 5.7% since Brexit vote	Birds Eye and Walkers ask supermarkets for up to 12% price rises	Now walkers blame Brexit as they hike crisps price by 10% - even though they are made in Britain from British potatoes	Brexit: Nestle hints at price rises after pound value crash

International Commitments: TRQ Issue

Parliamentary question on 13th July 2016:

CETA grants Canada two series of beef tariff quotas:

- *for fresh and refrigerated meat ;*
- *for frozen meat.*

The UK is to leave the EU in less than 2 years.

Question : Beef exports from Canada to the UK? Impact of Brexit on this TRQs?
Answer from the Commission: No exports from Canada to the UK, therefore no problem with TRQs.

However, the question remains for other products/ flows/ partners.

International Commitments: WTO

- Withdrawal of the UK from existing trade agreements between the EU and third countries
- Restoration of the status of the UK as a full member of the WTO
- UK / EU coordination on tariff quota allocation
- Negotiations with third countries for acceptance of this allocation

Conclusion: multi-partner negotiations

Exemple de contingent tarifaire – viande bovine UE27

Comment le contingent « viande bovine » de l'UE28 sera-t-il réparti entre le RU et l'UE27?

Et comment le RU et l'UE accèderont-ils à leurs contingents mutuels?

RU	Contingent UE27 (28?) viande bovine selon réglementation UE	UE 27
?	← **66 826** →	?
?	← **Argentine** 29 500 →	?
?	← **Australie** 7 150 →	?
?	← **Nouvelle Zélande** 1 300 →	?
?	← **Uruguay** 6 376 →	?
?	← **Brésil 10 000** →	?
?	← **Paraguay 1 000** →	?
?	← **Canada/ USA 11 500** →	?

Annex IV

TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

Meat Market Observatory

13 June 2017

EuroCommerce for retail & wholesale

Belgium

Period ending May 2017

Product category	price (% change May 2017 vs May 2016)	price (% change Jan – May 2017 vs January – May 2016)
Total pigmeat	+3,3%	+2,5%
Delicatessen (salami, ham, prosciutto, etc)	+0,5%	+0,6%
Processed pork (élaborés de viande)	+2,5%	+1,6%
Total beef and veal	+1,8%	+1,6%

Source: Comeos

France

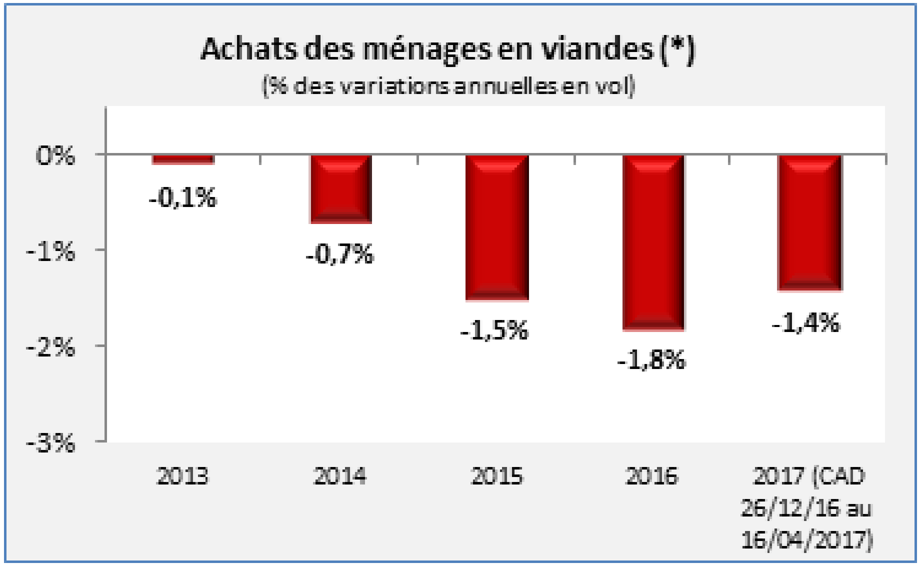
Period ending May 2017

Product category	volumes (% change year-to-date)	value (% change year-to-date)	price (% change year-to-date)	volumes (% change Year-to-year) (52 weeks)	value (% change Year-to-year) (52 weeks)	price (% change Year-to-year) (52 weeks)
Fresh meat	-1,2%	-1,1%	0,0%	-1,8%	-2,0%	-0,2%
Fresh beef	-0,3%	-1,5%	-1,2%	-1,1%	-2,0%	-0,9%
Fresh veal	-5,0%	-4,5%	+0,6%	-5,7%	-5,0%	+0,8%
Fresh lamb	-0,4%	-0,8%	-0,4%	-2,9%	-3,3%	-0,4%
Fresh pork	-3,1%	-0,6%	+2,5%	-1,9%	-0,9%	+1,0%
Tripe Products	-4,3%	-3,4%	+0,9%	-1,3%	-1,9%	-0,6%
Poultry	-2,5%	-2,5%	+0,0%	-2,6%	-2,7%	-0,1%
Frozen Beef	-3,3%	-3,6%	-0,3%	-3,3%	-2,0%	+1,4%
Total beef	-0,9%	-1,7%	-0,8%	-1,6%	-2,0%	-0,4%

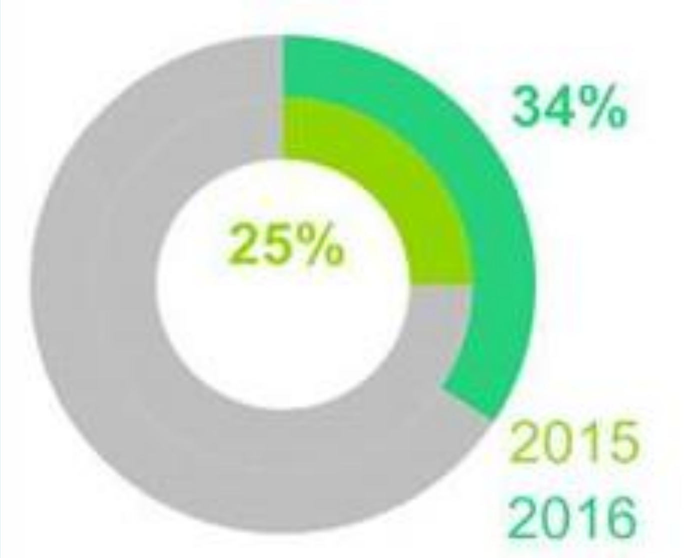
Source: Kantar Worldpanel

EuroCommerce

France



Period ending April 2017



Percentage of households with at least one person trying to limit or reduce the consumption of animal protein (excluding vegetarians and vegans)

Source: Kantar

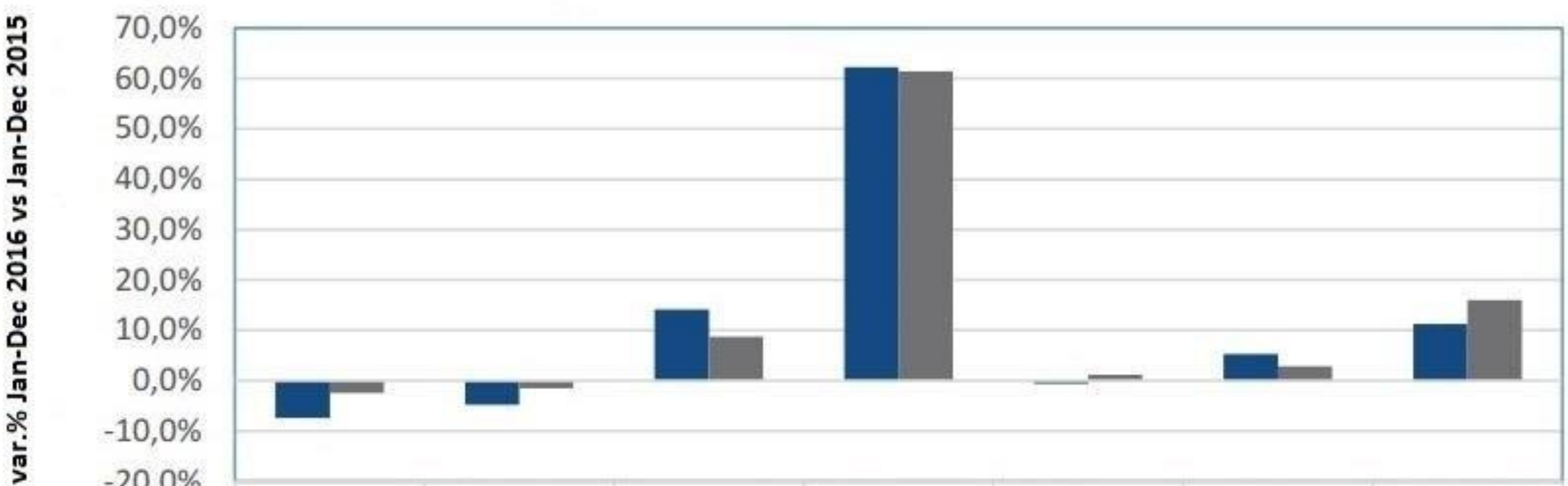
Italy – pigmeat

	Fresh meat	Cold Cuts	Cooked Ham	Raw Ham	Salami	Mortadella	Wurstel	Others
Volume	-4,8%	-4,2%	-1,0%	-3,1%	-2,7%	-4,9%	-13,9%	-2,8%
Value	-5,5%	-3,3%	-2,5%	-2,3%	-3,7%	-4,9%	-16,1%	-2,4%

Source:ISMEA - Tendenze - Suino

Italy - pigmeat

Household purchases of PGI cold cuts



	Prosciutto crudo	Prosciutto crudo San Daniele	Mortadella Bologna	Prosciutto crudo Toscano	Salame cacciatora	Speck Alto Adige	Zampone di Modena
var. % volume	-7,4%	-4,8%	14,2%	62,2%	-0,6%	5,3%	11,2%
var. % value	-2,5%	-1,5%	8,7%	61,4%	1,1%	2,9%	16,0%

Fonte: Elaborazione su dati ISMEA Nielsen-Consumer Panel Service

EuroCommerce

Spain

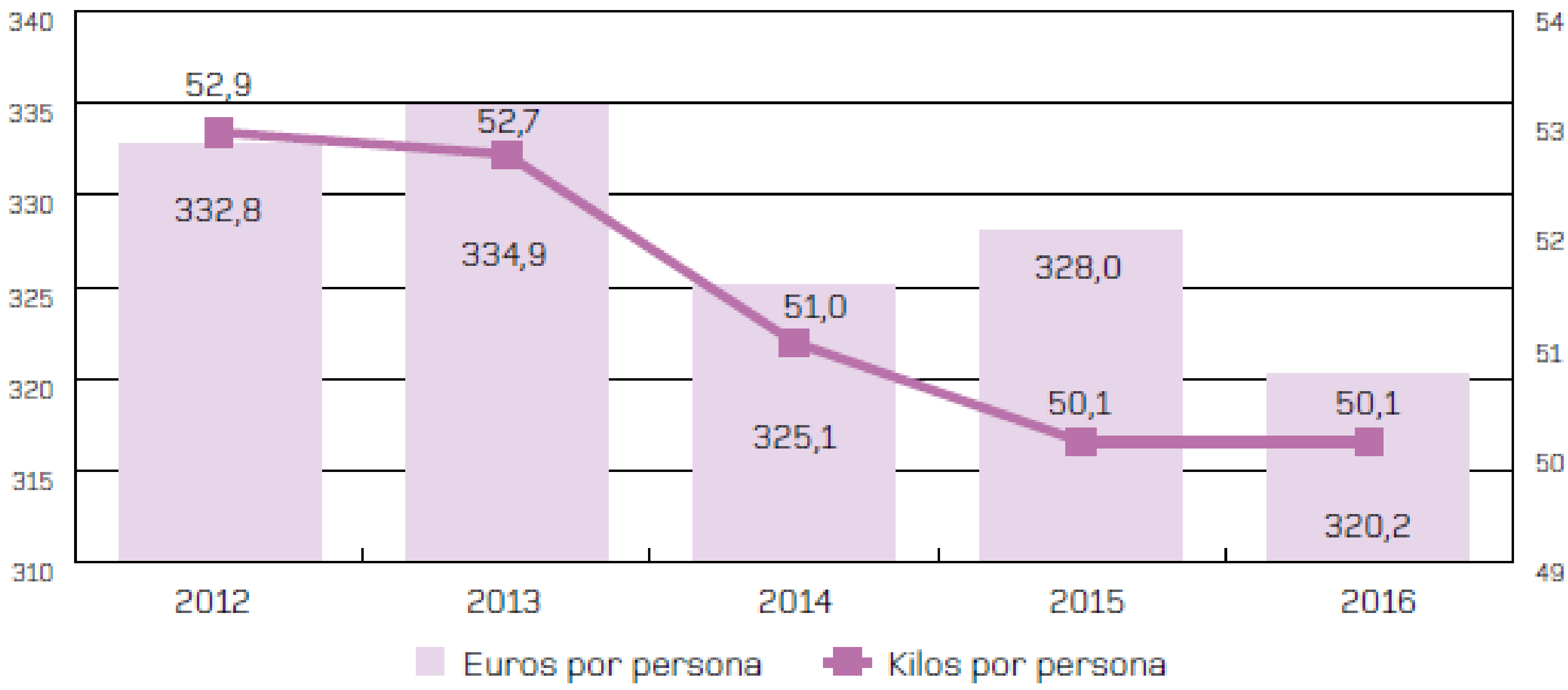
Period ending May 2017

Product category	Volumes (% change April 2016 - March 2017 vs 2015- 2016)	Volumes (% change March 2017 vs March 2017)	Value (% change April 2016 - March 2017 vs 2015- 2016)	Value (% change March 2017 vs March 2016)
Total meat	-1,0%	+1,8%	-4,2%	+3,4%
Pork	-2,9%	-0,5%	-5,5%	
Beef	-1,5%	-0,6%	-1,2%	
Frozen	-9,5%	-0,9%	-16,4%	
Processed (élaborés de viande)	+0,1%	+6,2%	+0,2%	

Source: http://www.magrama.gob.es/es/alimentacion/temas/consumo-y-comercializacion-y-distribucion alimentaria/informemesamesalimentacionfebrero2016_tcm7-423844.pdf

Spain

Evolution of consumption and expenditure on meat and meat products, 2012-201



Fuente: Elaboración propia con datos del Ministerio de Agricultura y Pesca, Alimentación y Medio Ambiente.

United Kingdom: beef

Period ending 24th April 2017			
Fresh & Frozen Beef	**4 weeks ended: 24th April 2017**	**12 weeks ended: 24th April 2017**	**52 weeks ended: 24th April 2017**
Expenditure (£ million)	**166,5**	**535,2**	**2.179,6**
annual change %	+6,0	+4,3	+1,3
Volume (tonnes)	**21.799**	**68.951**	**283.478**
annual change %	+5,0	+3,7	+3,5
Average price (£/kg)	**7,64**	**7,76**	**7,69**

Annual volume change %	**4 weeks ended: 24th April 2017**	**12 weeks ended: 24th April 2017**	**52 weeks ended: 24th April 2017**
Fresh & frozen beef	+5,0	+3,7	+3,5
- Roasting	+74,3	+1,7	-1,7
- Stewing	-10,3	+1,3	+4,1
- Frying/grilling steak	-0,4	+12,4	+8,7
- Mince	-9,0	+1,9	+3,5
- Marinade	+11,2	+9,9	+4,6
Burgers and grills	+23,1	+9,4	+3,1
Chilled ready meals	+5,9	+8,4	+4,1
Frozen ready meals	+8,1	+4,9	-3,9
Fresh pre-packed hot pies	-12,4	+3,4	+1,8
Fresh pre-packed pasties	+14,7	+0,3	-1,8
Frozen pies/puddings	+15,3	+12,5	-4,9

Please note Kantar data may be revised on a monthly basis.

Source: http://beefandlamb.ahdb.org.uk/markets/industry-reports/uk-statistics/

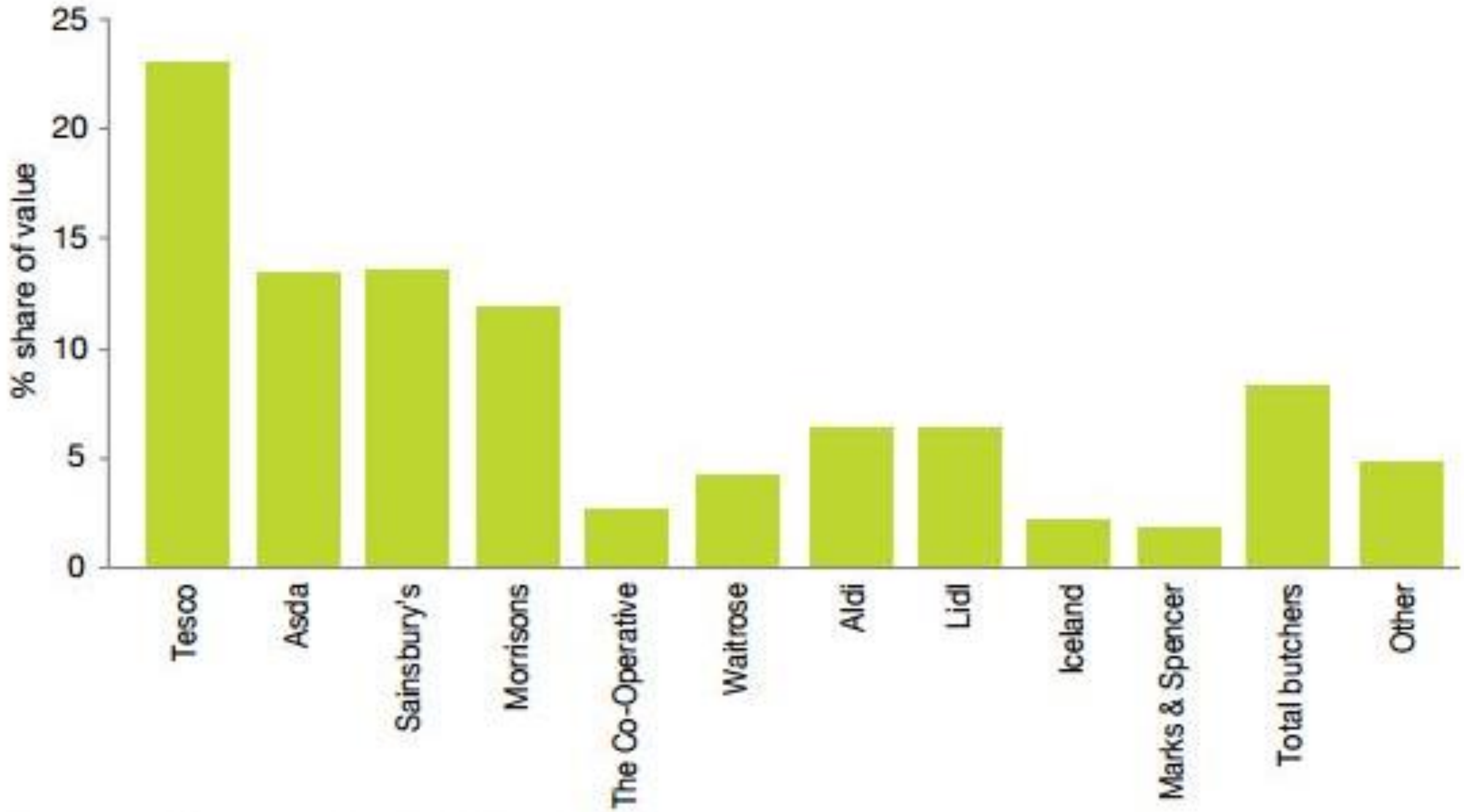
United Kingdom: pigmeat

Period ending 24th April 2017	4 weeks ended: 24th April 2017	12 weeks ended: 24th April 2017	52 weeks ended: 24th April 2017
Fresh & Frozen Pork			
Expenditure (£ million)	**55,0**	**172,6**	**723,2**
annual change %	+1,1	+0,3	-7,2
Volume (tonnes)	**12.281**	**38.537**	**161.793**
annual change %	+0,6	-1,3	-3,7
Average price (£/kg)	**4,48**	**4,48**	**4,47**
Fresh & frozen pork	+0,6	-1,3	-3,7
- Belly	-1,2	+12,5	+2,4
- Chops/Steaks	-3,9	+3,7	-1,1
- Leg Roasting Joint	+4,6	-13,2	-2,8
- Loin Roasting	+7,9	-0,6	-6,1
- Shoulder Roasting Joint	-12,4	-20,8	-13,5
- Marinades	+12,2	-4,6	-14,5
- Pork Ribs	+17,5	+3,1	-10,5
- Mince	+19,2	+17,8	+2,1
Bacon	+3,1	+1,4	+1,7
Pork Sausages	+7,2	+3,0	+1,3
Fresh PP Pork Pies	-1,1	-6,5	-2,1
Fresh PP Sausage Rolls	+2,6	-2,6	+0,9
Pork Sliced Cooked Meats (incl Ham)	+4,1	+4,1	+0,1
Ready Meals (chilled)	+6,5	+4,5	+3,9

Please note Kantar data may be revised on a monthly basis.

EuroCommerce

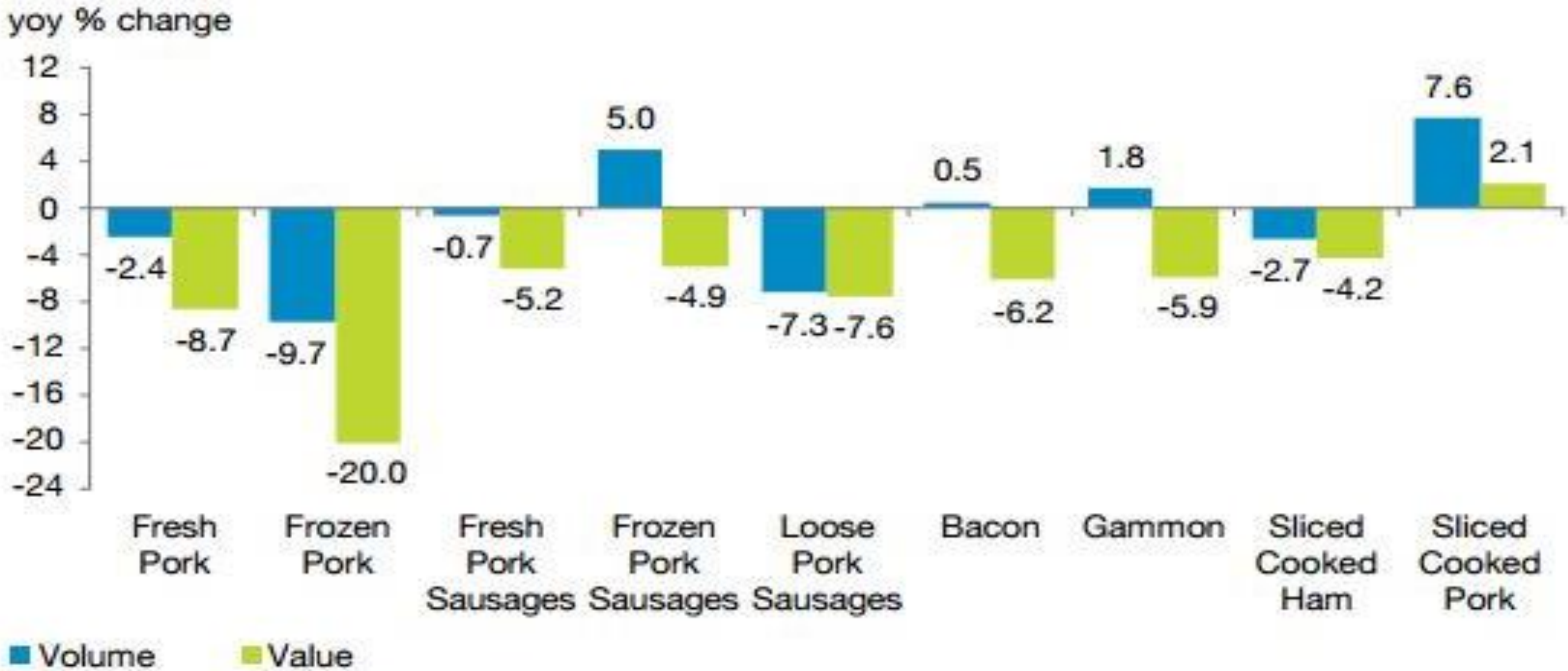
GB retailer shares of pig meat market by value, 2016



Data covers 52 weeks ending 1 January 2017
Source: Kantar Worldpanel

EuroCommerce

Change in GB retail volume and value sales of pig meat products, 2016



Data covers 52 weeks ending early January of the following year.
Source: Kantar Worldpanel

EuroCommerce

Annex V

Secteur porcin: l'accord de la chaîne alimentaire de 2015 suite à la crise du porc

Gwenaëlle Martin,
Coordinatrice politique à la FUGEA (Belgique)
13 juin 2017

Etude de cas de la Belgique:

Crise du porc de 2015: négociations et accord sur le prix du porc

1- Crise du porc – manifestations en Belgique

2- Accord du 31 août 2015

3- négociations avec la chaîne sur le court terme

4- accord du 21 décembre 2015 sur le court terme

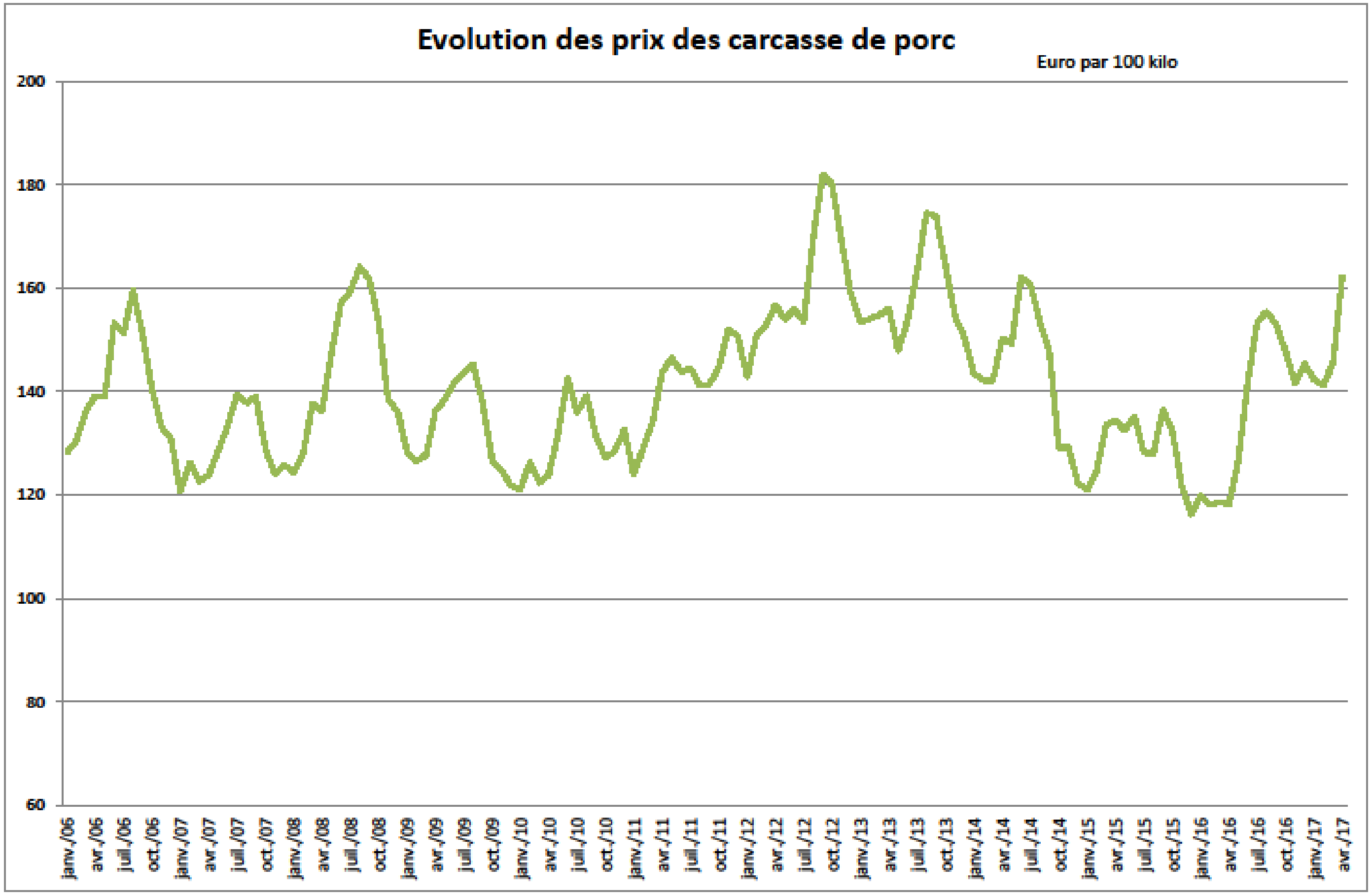
5- Mise en œuvre de l'accord

6- Bilan de l'accord

7- Notre position

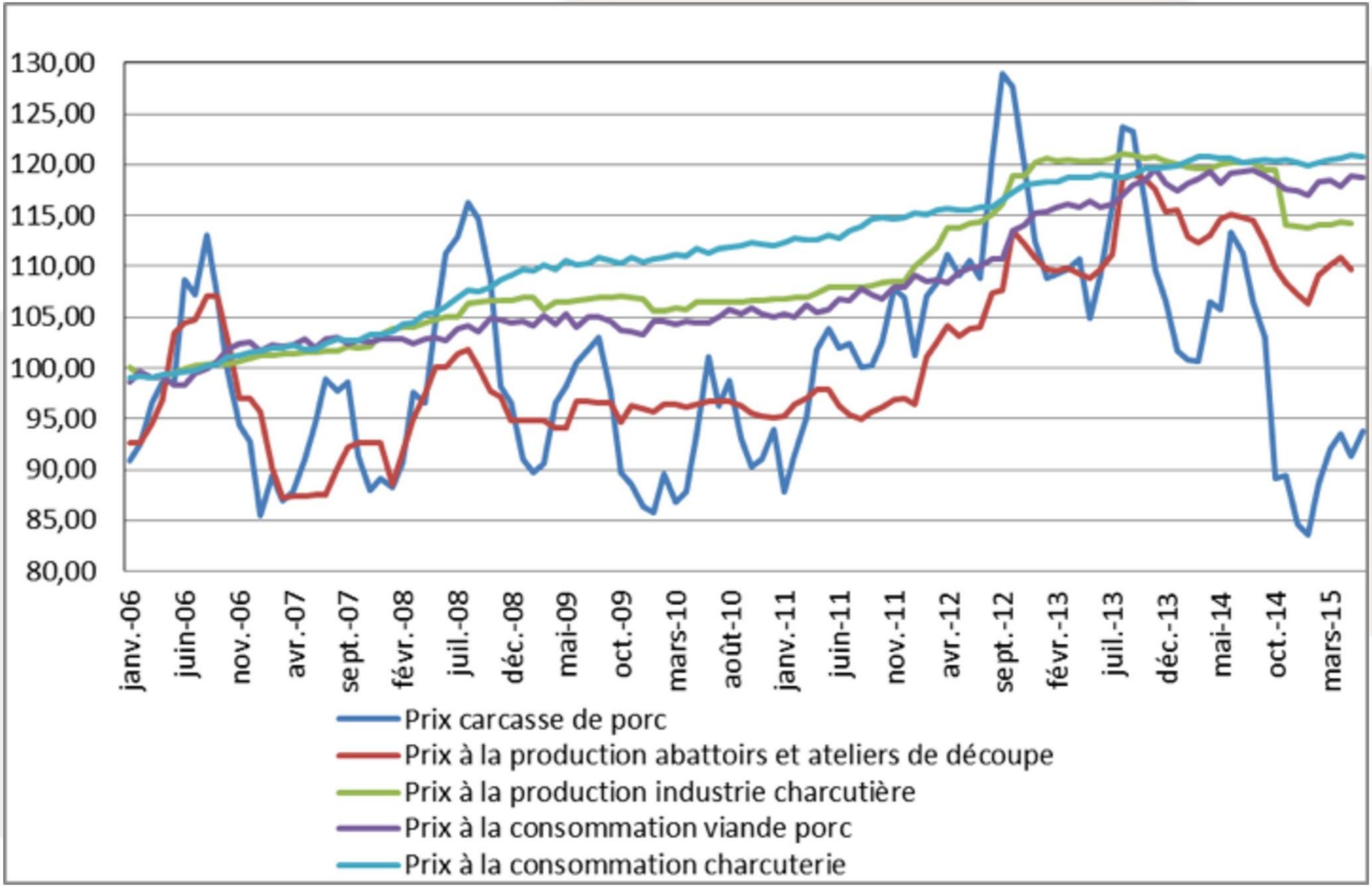
1- Crise du porc: manifestations en Belgique

Situation économique très difficile des éleveurs de porcs



B.3. Transmission des prix dans la filière porcine

Indice 2006=100



Source: Région flamande, SPF Economie – DG Statistique

29, 30 & 31 juillet: blocage des centrales de distribution pour marquer notre colère

2- Accord du 31 août historique sans précédent pour le secteur porcin

Signé par les partenaires de la Concertation belge de la chaîne agroalimentaire (organisations agricoles, industrie et grande distribution)

En étroite collaboration avec le Service Public Fédéral (administration)

2- Accord du 31 août historique sans précédent pour le secteur porcin

- **A court terme: aide temporaire pour le secteur laitier et porcin**

•Une aide temporaire et directe à l'éleveurs de porcs pour atténuer les conséquences de la crise
•Montant forfaitaire par truie présente
•Aide limitée sur 6 mois (en raison des règles de la concurrence)
•Budget de 30 millions d'euros dont 24 déjà dégagés

2- Accord du 31 août historique sans précédent pour le secteur porcin

- **A long terme: recherche d'un mécanisme de stabilisation**

- **Travailler ensemble sur un mécanisme de stabilisation au cours des futurs mois**
- **Mécanisme de stabilisation interprofessionnel (tous les acteurs impliqués)**
- **Pouvant être appliqué pendant les périodes de crise aigüe**
- **En collaboration avec l'administration**
- **Travail sur les instruments prévus dans le 2e pilier**

3- Négociations avec les partenaires de la chaîne sur le court terme

- Entre le 31 août et le 21 décembre 2015: une dizaine de réunions de négociations organisées entre les agriculteurs, les transformateurs et la grande distribution pour mettre en œuvre l'accord et trouver les finances

- Quelle genre de prime? Prime à l'abattage…FUGEA contre
- Que permettent les autorités de la concurrence? Négociations difficiles en raison de la recherche de l'approbation des autorités de la concurrence
- Financement volontaire par les organisations

4- accord du 21 décembre 2015 sur le court terme

Préfinancement de 7,5 millions d'euros pour financer la prime à la truie

10 millions garantis pour arriver à 15 mio € max

Accord signé entre les organisations agricoles + les représentants du secteur de la viande + de l'alimentation animale + de la charcuterie+ grande distribution

Accord signé mais financement volontaire !

4- accord du 21 décembre 2015

= un accord limité par les autorités de la concurrence

En « temps normal » un tel accord n'aurait pas pu être conclu car considéré comme une <u>entente sur les prix</u> !

Accord autorisé mais avec des conditions très strictes :

- Un accord à court terme
- Accord sur une période bien définie (financement sur 1 an max.)
- Non reconductible (même si la crise continue)
- Un accord avec un impact faible…donc pas d'opposition:

• Impact financier pour les éleveurs

5- Mise en œuvre de l'accord

Préfinancement de 7,5mio € avancé par:

- 1/3 industrie de la viande
- 1/3 grande surface
- 1/3 firmes d'aliments

➔prime de 24,30€ à la truie aux éleveurs ayant des truies versée le 31.03.2016

5- Mise en œuvre de l'accord

La récupération des finances de 7,5mio (jusque 15 mio €) se fait:

- via les abattoirs, ateliers de découpe et commerces de gros de la viande porcine
- sur une durée max de 12 mois
- Perception dans un fonds contrôlé par un organisme indépendant de:

- 10 cents /kg de viande de demi-carcasses et morceaux à désosser,
- 12 cents/kg de viande de morceaux désossés prêts à la découpe et
- 15 cents/kg pour les découpes et préparations de viande fraîche

6- Bilan de l'accord

- Un accord historique car signé par l'ensemble de la chaîne
- Bonne volonté et financement de certains mais pas tous les acteurs. Certains n'ont pas joué le jeu (les franchisés dans la grande distribution notamment ou l'industrie charcutière)
- Conditions strictes des autorités de la concurrence ont limité les portées de l'accord
- Accord largement insuffisant pour « sauver le secteur »: portée symbolique mais appréciée malgré tout par les éleveurs
- Préfinancement de 7,5 millions € mais au 31 mai 2017, le préfinancement n'a pas été atteint (approximativement 6,8 mio € dans le fonds)

7- Notre position

Constat: manque de régulation dans le secteur porcin:

- **l'Europe produit trop de porcs**
- **L'Europe dépend entièrement des marchés extérieurs pour écouler ses surplus**
- **Les autorités de la concurrence empêche le secteur de s'entre-aider durablement**

7- Notre position

<u>Besoin de mettre en place de la régulation dans le secteur porcin:</u>

Pour cela, besoin de statistiques claires et précises: sur les marges, sur la situation des éleveurs…

<u>Besoin d'une politique de protection des éleveurs:</u>

Pour cela, il faut revoir les règles de concurrence concernant l'agriculture…pas seulement dans le cadre des OP.

+ stop aux accords de libre-échange qui font périr nos éleveurs, mettre en place une politique de protection des abattoirs de proximité, promotion du métier et de la viande…

<u>Besoin d'une politique alimentaire de qualité:</u>

non à la réintroduction des farines animales, à des alternatives à la castration des porcelets qui posent question, des étiquettes claires pour le consommateur…

Merci pour votre attention

Annex VI

DATA SOURCING FOR IMPROVED MARKET TRANSPARENCY:
Evolution of Unit Value of beef and pigmeat products subject to Intra-EU exchanges

Meat Market Observatory

13 June 2017

European Commission

Agriculture and Rural Development

Main objective

- *Study on the evolution overtime (monthly) of the unit value (EUR/100Kg) of representative products in the beef and veal and pigmeat supply chains*
- *Assessment of trends*
- *To discuss the possibility to use it as indicator*

Main considerations

- *Data used:*
  - **Eurostat COMEXT database**
  - **Intra EU exchanges (Volume and value)**
- *Products:*
  - **Specific CN codes considered as representative of different stages in the supply chain**
- *Advantages:*
  - **Public and comparable data**
- *Limitations:*
  - **Lack of specificity of products**
  - **Very limited representation of the overall market3**

Beef products

02011000	Carcases or half carcases
02012020	Compensated quarters
02012030	Forequarters
02012050	Hindquarters
02012090	Other bone-in cuts
02013000	Boneless cuts

Beef products: Intra EU exchanges in 2016

% In Total Intra EU exchanges			
		QUANTITY IN 100KG	VALUE IN EUROS
02011000	Carcases or half carcases	21,24%	15,54%
02012020	Compensated quarters	6,41%	4,16%
02012030	Forequarters	8,25%	4,83%
02012050	Hindquarters	12,13%	11,41%
02012090	Other bone-in cuts	9,95%	8,87%
02013000	Boneless cuts	42,02%	55,19%
Total		**100,00%**	**100,00%**

European Commission

Beef products: Intra EU exchanges in 2016

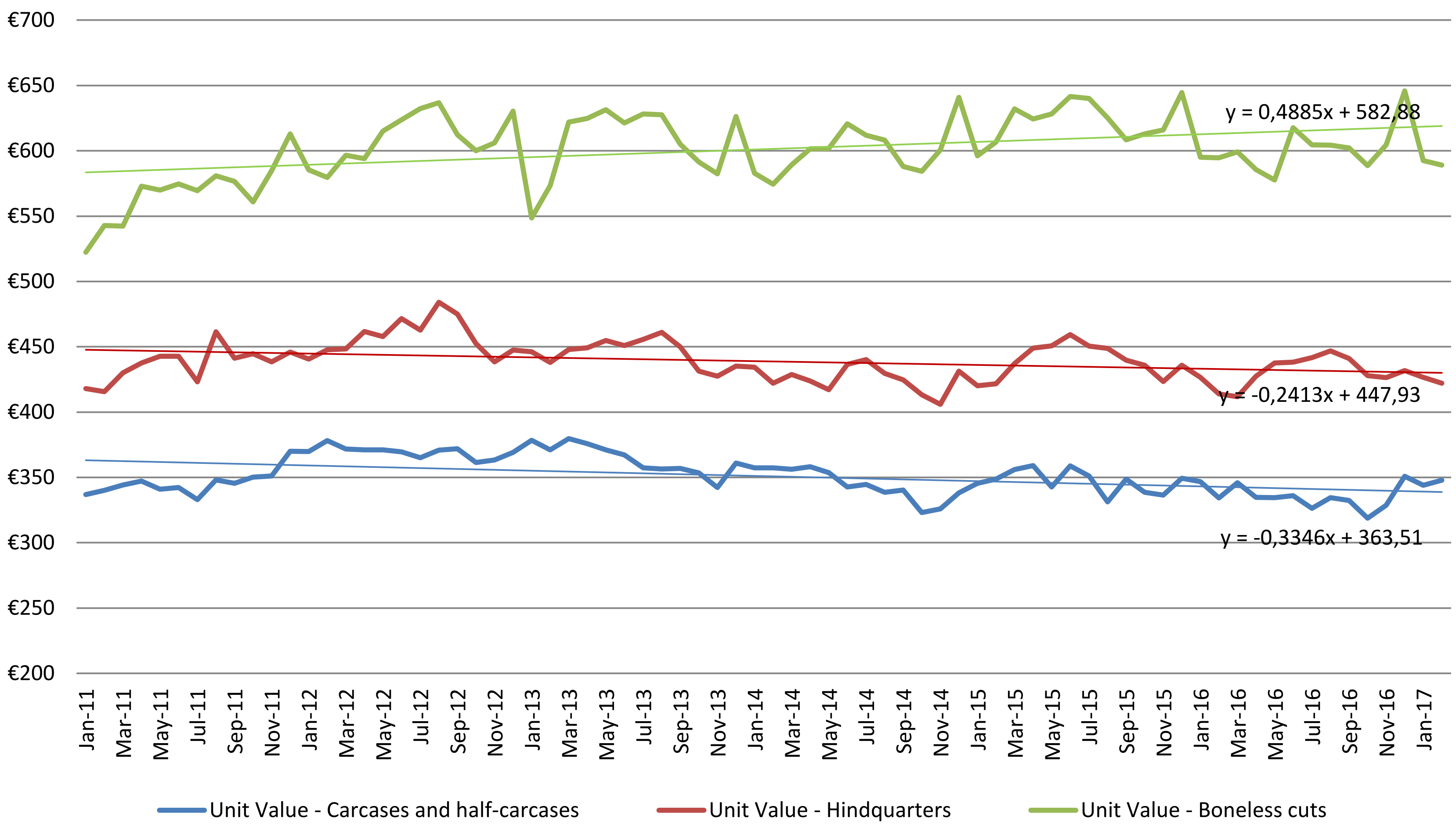
		QUANTITY IN 100KG	VALUE IN EUROS	UNIT VALUE (EUR/100Kg)
02011000	Carcases or half carcases	8.026.401	€2.691.496.829	€335,33
02012020	Compensated quarters	2.421.013	€721.046.641	€297,83
02012030	Forequarters	3.116.601	€836.758.031	€268,48
02012050	Hindquarters	4.583.719	€1.975.708.373	€431,03
02012090	Other bone-in cuts	3.761.141	€1.535.731.921	€408,32
02013000	Boneless cuts	15.878.049	€9.559.560.226	€602,06

Beef products: Correlation Unit Value (Monthly Evolution from January 2011 to February 2017)

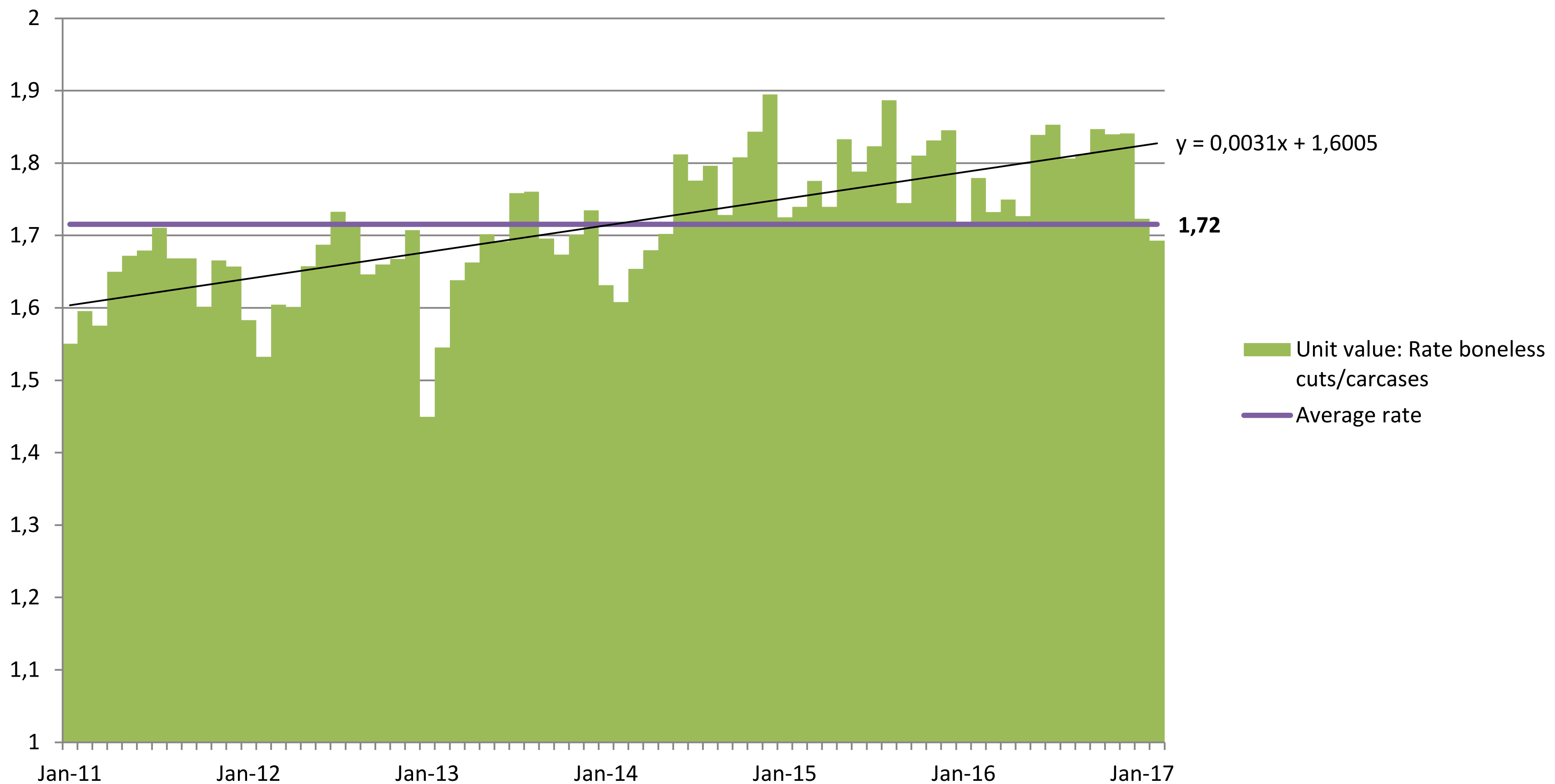
Correlation Unit Value	*Carcases and half-carcases*
Carcases and half-carcases	1
Compensated quarters	0,824545864
Forequarters	0,786215901
Hindquarters	0,588916592
Other bone-in cuts	0,613167841
Boneless cuts	0,213242426

- *Baseline: Carcases and half carcases*
- *Positive correlation with all lines*
- *Very weak correlation with boneless cuts*

Beef products: Unit Value Evolution



Beef products: Evolution of Unit Value Rate



Pigmeat products

02031110	Carcases and half carcases
02031211	Bone-in hams
02031219	Bone-in shoulders
02031911	Fore-ends
02031913	Loins
02031915	Bellies
02031955	Other Boneless cuts
02031959	Other Bone-in cuts
02101981	Dried or smoked boneless meat
16010091	Uncooked sausages
16010099	Sausages and meat products
16024110	Hams prepared and preserved

Pigmeat products: Intra EU exchanges in 2016

% in intra EU exchanges		QUANTITY_IN_100KG	VALUE_IN_EUROS
02031110	Carcases and half carcases	19,87%	13,16%
02031211	Bone-in hams	20,21%	14,83%
02031219	Bone-in shoulders	3,48%	2,40%
02031911	Fore-ends	3,85%	2,20%
02031913	Loins	4,02%	4,27%
02031915	Bellies	4,86%	4,70%
02031955	Other Boneless cuts	23,79%	24,04%
02031959	Other Bone-in cuts	2,27%	1,82%
02101981	Dried or smoked boneless meat	2,42%	7,44%
16010091	Uncooked sausages	4,12%	9,06%
16010099	Sausages and meat products	7,92%	9,77%
16024110	Hams prepared and preserved	3,19%	6,32%
Total		**100,00%**	**100,00%**

Pigmeat products: Intra EU exchanges in 2016

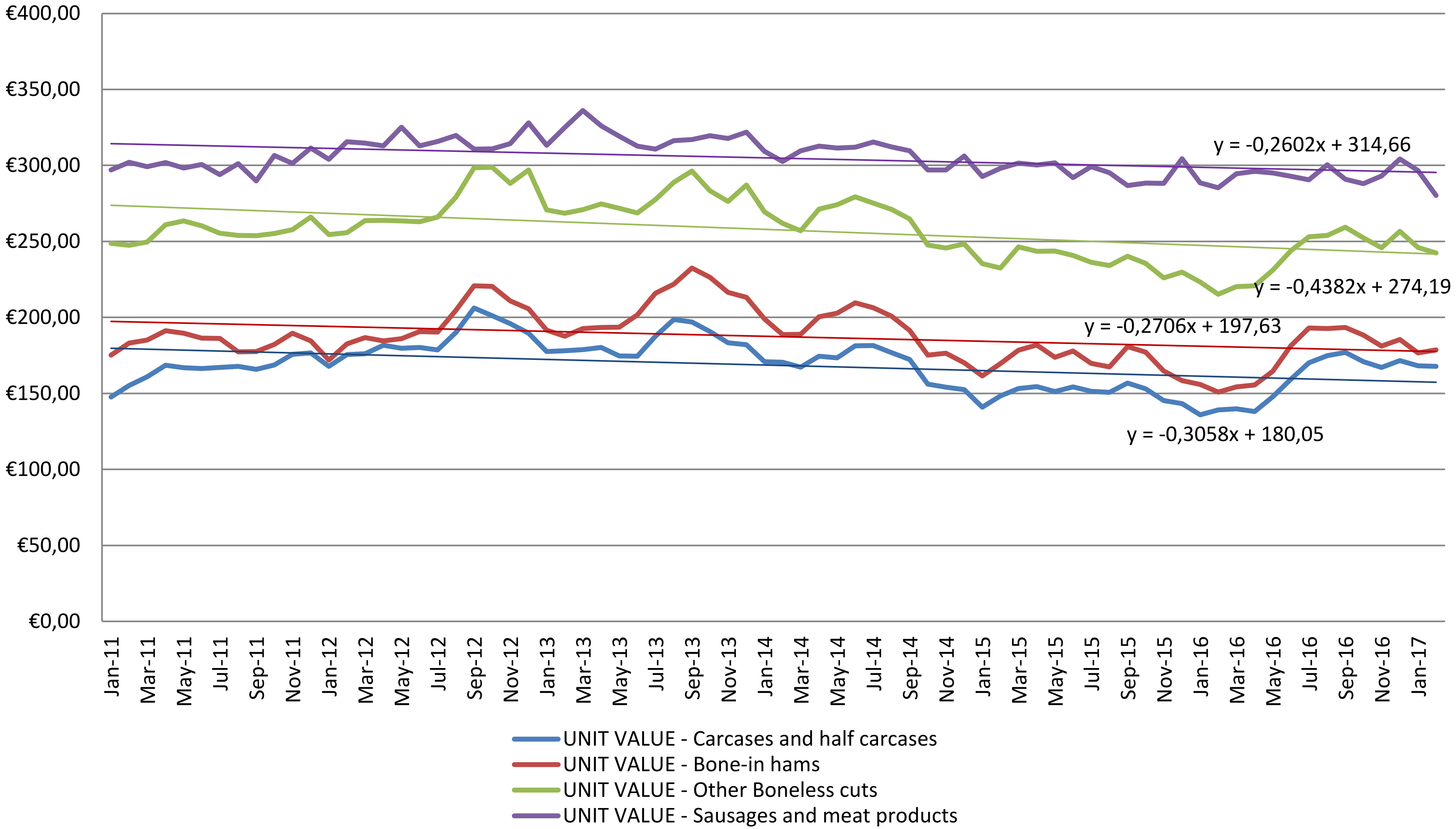
		QUANTITY_IN_100KG	VALUE_IN_EUROS	UNIT VALUE (EUR/100Kg)
02031110	Carcases and half carcases	21.488.172	€3.387.038.168	€157,62
02031211	Bone-in hams	21.857.967	€3.816.810.006	€174,62
02031219	Bone-in shoulders	3.762.157	€616.803.746	€163,95
02031911	Fore-ends	4.166.094	€566.099.869	€135,88
02031913	Loins	4.347.887	€1.098.588.898	€252,67
02031915	Bellies	5.261.107	€1.209.917.172	€229,97
02031955	Other Boneless cuts	25.736.151	€6.188.673.164	€240,47
02031959	Other Bone-in cuts	2.453.587	€467.583.229	€190,57
02101981	Dried or smoked boneless meat	2.615.215	€1.915.913.572	€732,60
16010091	Uncooked sausages	4.457.418	€2.333.217.971	€523,45
16010099	Sausages and meat products	8.568.016	€2.513.868.656	€293,40
16024110	Hams prepared and preserved	3.455.100	€1.625.795.073	€470,55

Pigmeat products: Correlation Unit Value (Monthly Evolution from January 2011 to February 2017)

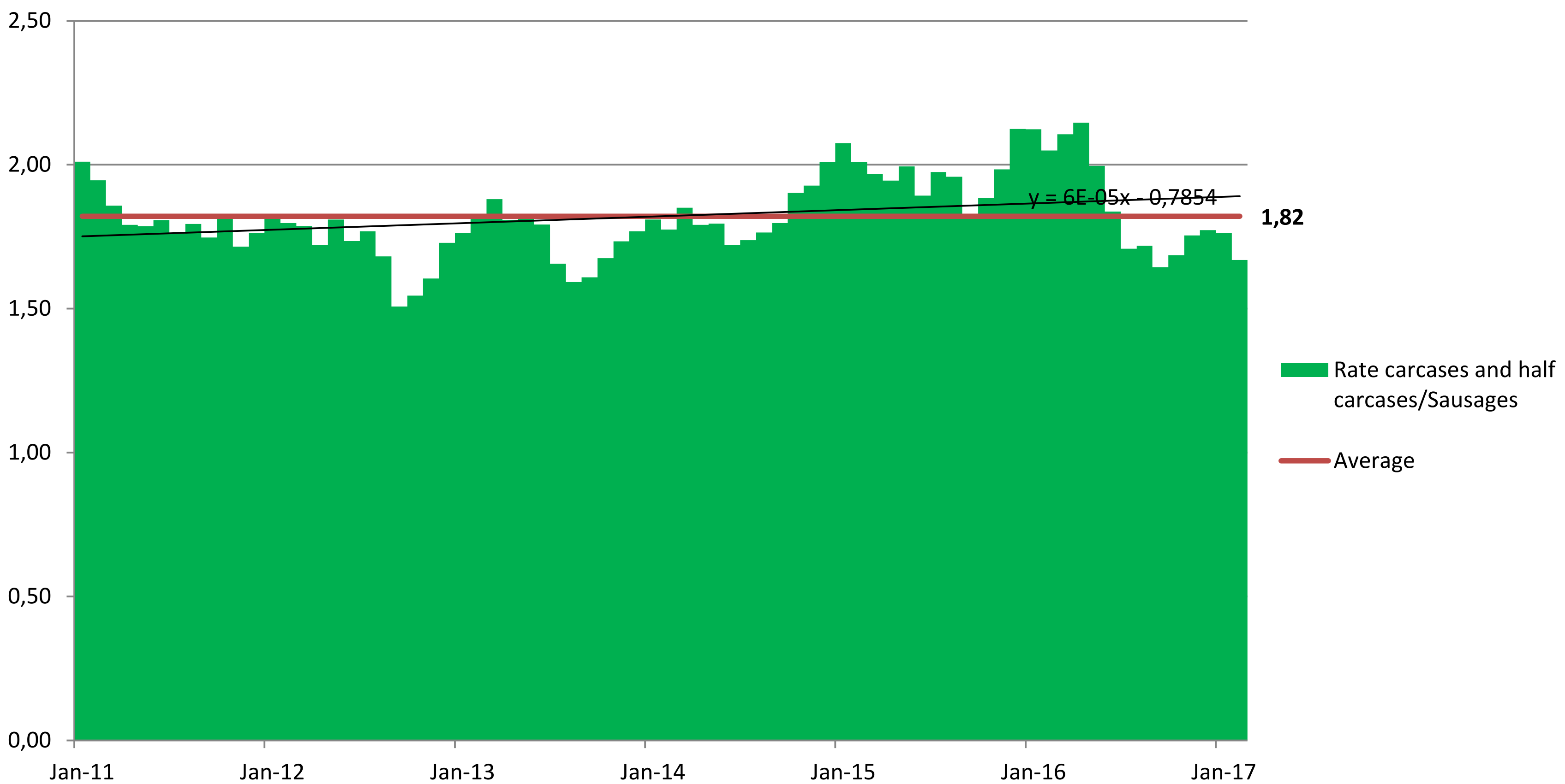
Correlation Unit Value	*Carcases and half carcases*
Carcases and half carcases	1
Bone-in hams	0,91211012
Bone-in shoulders	0,971751295
Fore-ends	0,956177131
Loins	0,891753468
Bellies	0,685964974
Other Boneless cuts	0,945316366
Other Bone-in cuts	0,039416918
Dried or smoked boneless meat	0,182905372
Uncooked sausages	-0,03155936
Sausages and meat products	0,684008105
Hams prepared and preserved	0,123216176

- *Baseline: Carcases and half carcases*
- *Positive strong correlation with 1st stage of processing*

Pigmeat products: Unit Value Evolution



Pigmeat products: Evolution of Unit Value Rate



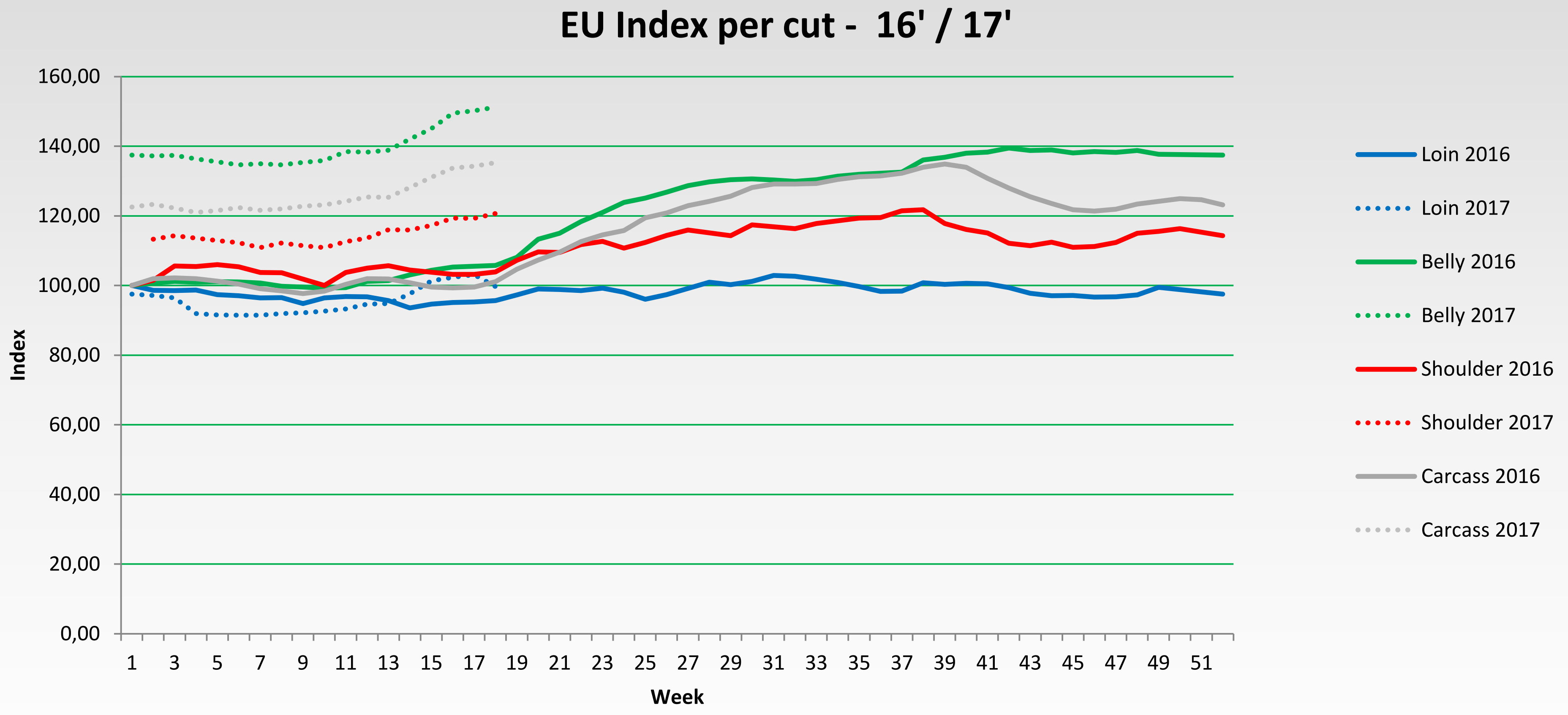
European Commission

Thank you and happy to discuss

Annex VII

Building a meat cut prices index (pork)

STEP 6: Compute EU per-pork-cut Index



Annex VIII

European Commission

ENJOY IT'S FROM EUROPE

INFORMATION AND PROMOTION PROGRAMMES FOR MEAT

Meat Market Observatory– Promotion,
13 June 2017

Agriculture and Rural Development

Promotion work programme for 2017

	%	Mio EUR
SIMPLE PROGRAMMES in Internal Market	25%	22.5
TOPIC 1. Quality Schemes	55%	12.375
TOPIC 2. Generic	45%	10.125
SIMPLE PROGRAMMES in Third Countries	70%	63
TOPIC 3. China, Japan, South Korea, Taiwan, South East Asia, India	23.4%	14.75
TOPIC 4. USA Canada Mexico	18.4%	11.6
TOPIC 5. Africa, Middle East and Turkey	13.4%	8.45
TOPIC 6. Other Regions	18.4%	11.6
TOPIC 7. Dairy and Pigmeat	20%	12.6
TOPIC 8. Beef	6.3%	4
Market disturbance/additional call for proposals	5%	4.5
Total SIMPLE	**100%**	**90**
MULTI PROGRAMMES	**%**	**Mio EUR**
TOPIC A. Programmes increasing the awareness of sustainable agriculture and the role of agriculture for climate action on the internal market.	35%	15.05
TOPIC B. Information on EU quality schemes (IM/TC)	35%	15.05
TOPIC C. Programmes highlighting the specific features of agricultural methods in the Union and the characteristics of EU agrifood products (IM/TC)	30%	12.9
Total MULTI	**100%**	**43**
TOTAL SIMPLE and MULTI PROGRAMMES 2017		**133**
Commission own initiatives		9.5
TOTAL PROMOTION PROGRAMMES 2017		**142.5**

European Commission

Information and promotion programmes for meat
Running programmes in the internal market

Program Proposal Year	Market Type	Program Member State(s) String	Program Product(s) String	Program Target Countrie(s) String	Global Budget Amount	Global Financial Breakdown Amount
2013	Internal Market	IT	MEAT+WINES	DE+IT+GB+NSE	1.650.027,06	825.013,53
2014	Internal Market	BG	DAIRY+SHEEP	DE+GR+BG+HR	3.577.371,20	1.788.685,60
2014	Internal Market	DE	FRESH F&V+MEAT	DE	1.500.000,00	750.000,00
2014	Internal Market	ES	SHEEP	ES	4.155.000,00	2.077.500,00
2014	Internal Market	FR+IE+GB	SHEEP	DE+BE+DK+FR+IE+GB+NSE	6.451.464,00	3.225.732,00
2015	Internal Market	AT	MEAT	AT	1.898.446,40	949.223,20
2015	Internal Market	EE	MEAT	SE+LV	595.596,00	297.798,00
2016	Internal Market	AT	BOVINE+CHEESE+DAIRY +EGGS+FRUIT+PORK+POULTRY+ SHEEP+VEGETABLES	DE+AT	3.000.000,00	2.100.000,00
2016	Internal Market	DE	PORK	DE+IT+AT		
2016	Internal Market	ES	BOVINE+CHEESE+FRUIT+MEATP REPARATIONS +OLIVEOIL+OTHER+PREPARATIO NS	ES	948.202,00	663.741,40
2016	Internal Market	ES	MEATPREPARATIONS +PORK	DE+ES+FR+PT+GB	1.951.926,00	1.366.348,20
2016	Internal Market	ES	MEATPREPARATIONS	DE+FR+GB	548.030,60	383.621,42
2016	Internal Market	GR	SHEEP	ES+IT+GR	3.200.264,00	2.400.198,00
2016	Internal Market	IT	CHEESE+OLIVEOIL+PORK+WINE	DE+IT+GB	1.023.081,00	716.156,71
2016	Internal Market	IT	MEATPREPARATIONS+PORK	DE+IT	3.201.000,00	2.240.700,00
2016	Internal Market	SI	MEATPREPARATIONS	SI	633.136,00	443.195,20
2016	Internal Market	SI	MEATPREPARATIONS	SI	628.265,00	439.785,50
					34.961.809,26	20.667.698,76

European Commission

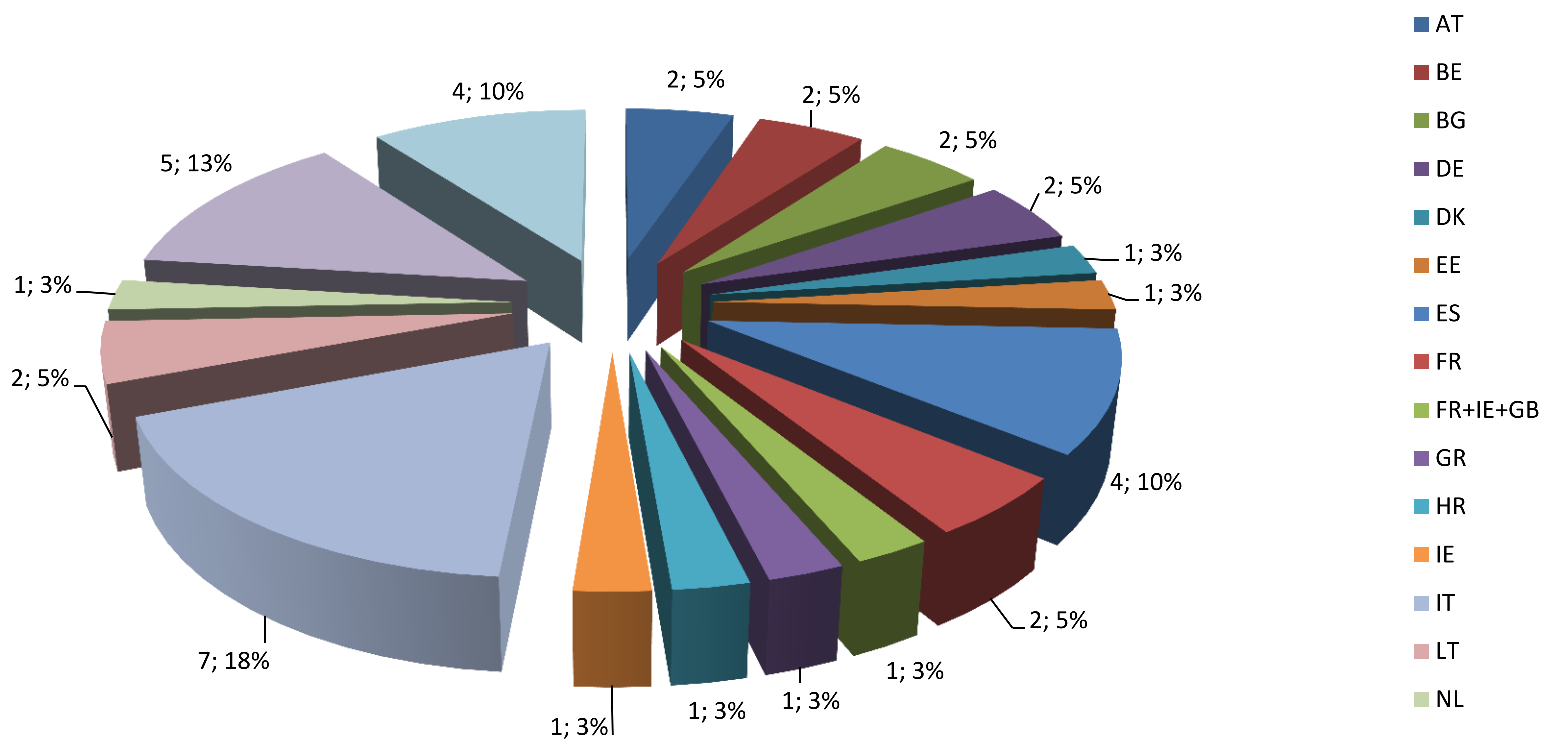
Information and promotion programmes for meat Running programmes in third countries

Program Proposal Year	Market Type	Program Member State(s) String	Program Product(s) String	Program Target Countrie(s) String	Global Budget Amount	Global Financial Breakdown Amount
2013	Third Countries	LT	BEEF/VEAL/PIG	RU	3.641.926,00	1.820.963,00
2013	Third Countries	SI	Q. POULTRY	RS+ME+MK+BA+KO	1.570.425,12	785.212,56
2014	Third Countries	PL	BEEF/VEAL/PIG	TR	876.043,00	438.022,00
2015	Third Countries	BE	BEEF/VEAL/PIG	AU+CN+KR+JP+SEA	1.670.215,00	835.107,00
2015	Third Countries	BG	DAIRY+SHEEP	KZ+MEA	4.457.456,20	2.228.728,11
2015	Third Countries	DK	BEEF/VEAL/PIG	CN	4.624.550,00	2.312.275,00
2015	Third Countries	LT	BEEF/VEAL/PIG	AFR+NAM+MEA	2.804.085,00	1.402.042,50
2015	Third Countries	PL	BEEF/VEAL/PIG	AFR+KZ+NZ+SEA	2.341.877,00	1.170.938,00
2015	Third Countries	PL	BEEF/VEAL/PIG+FRESH F&V+PROC. F&V +Q. POULTRY	AFR+BY+CN	5.357.143,00	2.678.571,00
2015	Third Countries	PL	BEEF/VEAL/PIG	JP+NAM	906.806,00	453.403,00
2015	Third Countries	PL	Q. POULTRY	CN+SEA+MEA	4.192.470,00	2.096.235,00
2016	Third Countries	BE	MEATPREPARATIONS +POULTRY	PH+SG+VN	745.642,01	596.513,61
2016	Third Countries	FR	BOVINE+CHEESE+DAIRY+MEATPREPARATIONS +PORK+POULTRY+PREPARATIONS+(20)OTHER	CN	700.540,00	560.432,00
2016	Third Countries	FR	MEATPREPARATIONS	US	1.147.509,84	918.007,87
2016	Third Countries	HR	CHEESE+SHEEP	AE+QA	4.145.637,44	3.316.509,95
2016	Third Countries	IE	BOVINE+SHEEP	CN+JP	3.760.706,00	3.008.564,80
2016	Third Countries	IT	CHEESE+PORK+WINE	US	5.955.347,00	4.764.277,59
2016	Third Countries	IT	MEATPREPARATIONS+WINE	CA+US	1.295.005,01	1.036.004,00
2016	Third Countries	IT	CHEESE+MEATPREPARATIONS	CN+JP	5.904.500,00	4.723.600,00
2016	Third Countries	IT	CHEESE+MEATPREPARATIONS	CA+US	2.499.999,99	1.999.999,98
2016	Third Countries	NL	PORK	PH+TW+VN+CN+JP	1.999.100,00	1.599.280,00
2016	Third Countries	SI	MEATPREPARATIONS	RS	929.033,00	743.226,45
					61.526.016,61	39.487.913,42

European Commission

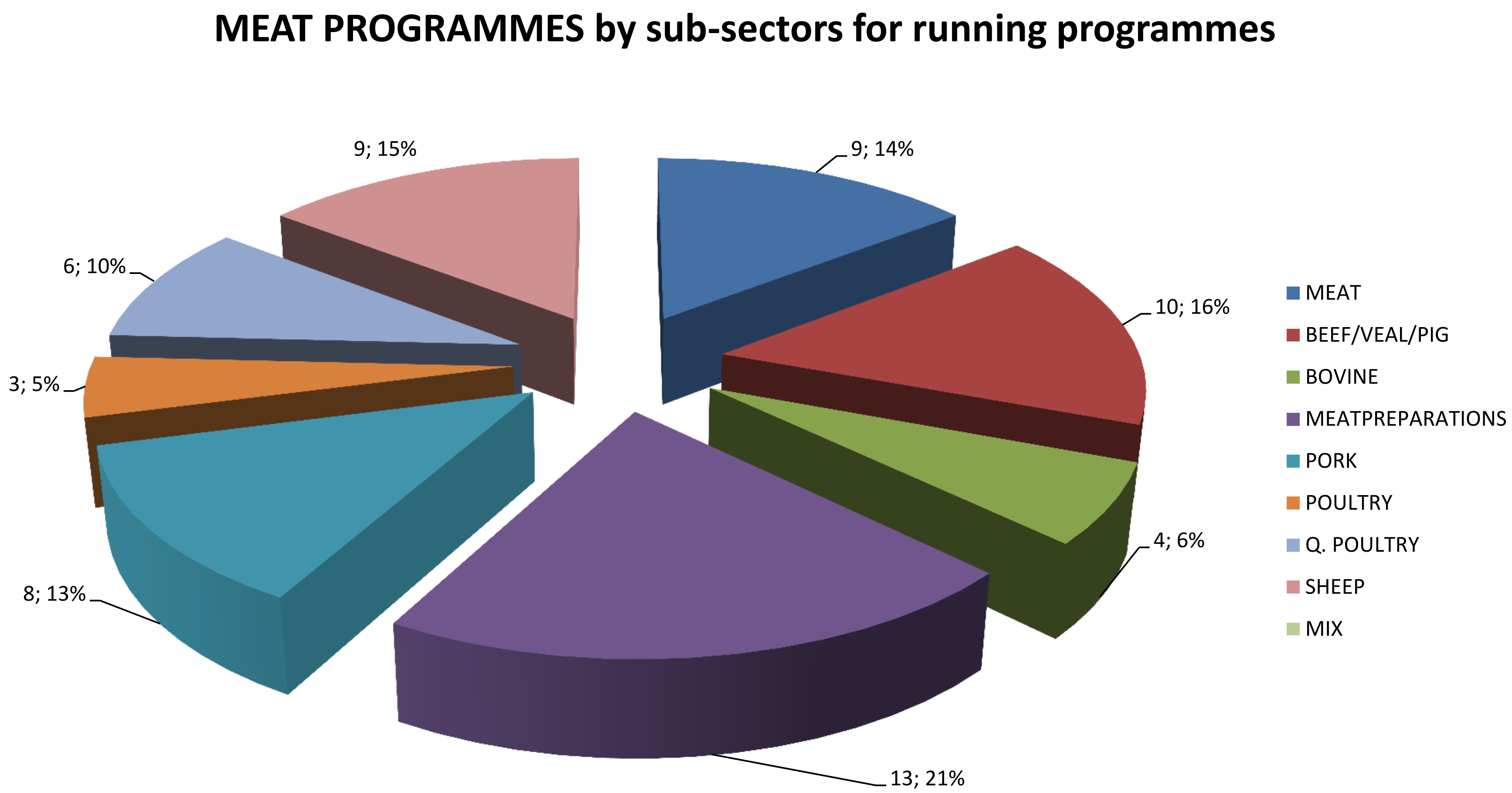
INFORMATION AND PROMOTION PROGRAMMES FOR MEAT

% of Meat Programmes by country for running programmes



European Commission

INFORMATION AND PROMOTION PROGRAMMES FOR MEAT



Follow us on social media: #EUAgriPromo

Visit also our portal www.agripromotion.eu