



***SHEEP / GOAT CIVIL DIALOGUE GROUP***  
***Market Situation for Sheep & Goats***  
***24 November 2016***

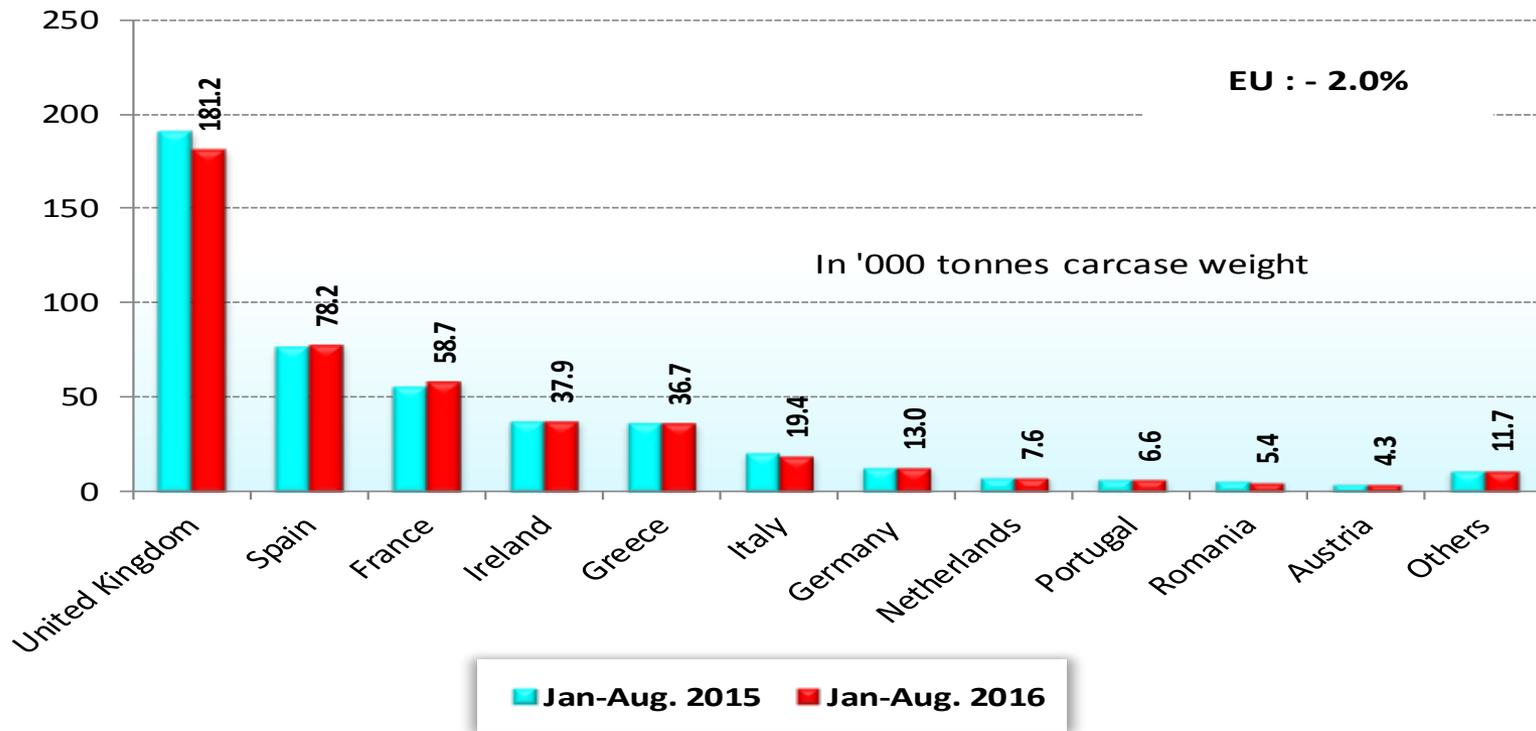


European  
Commission

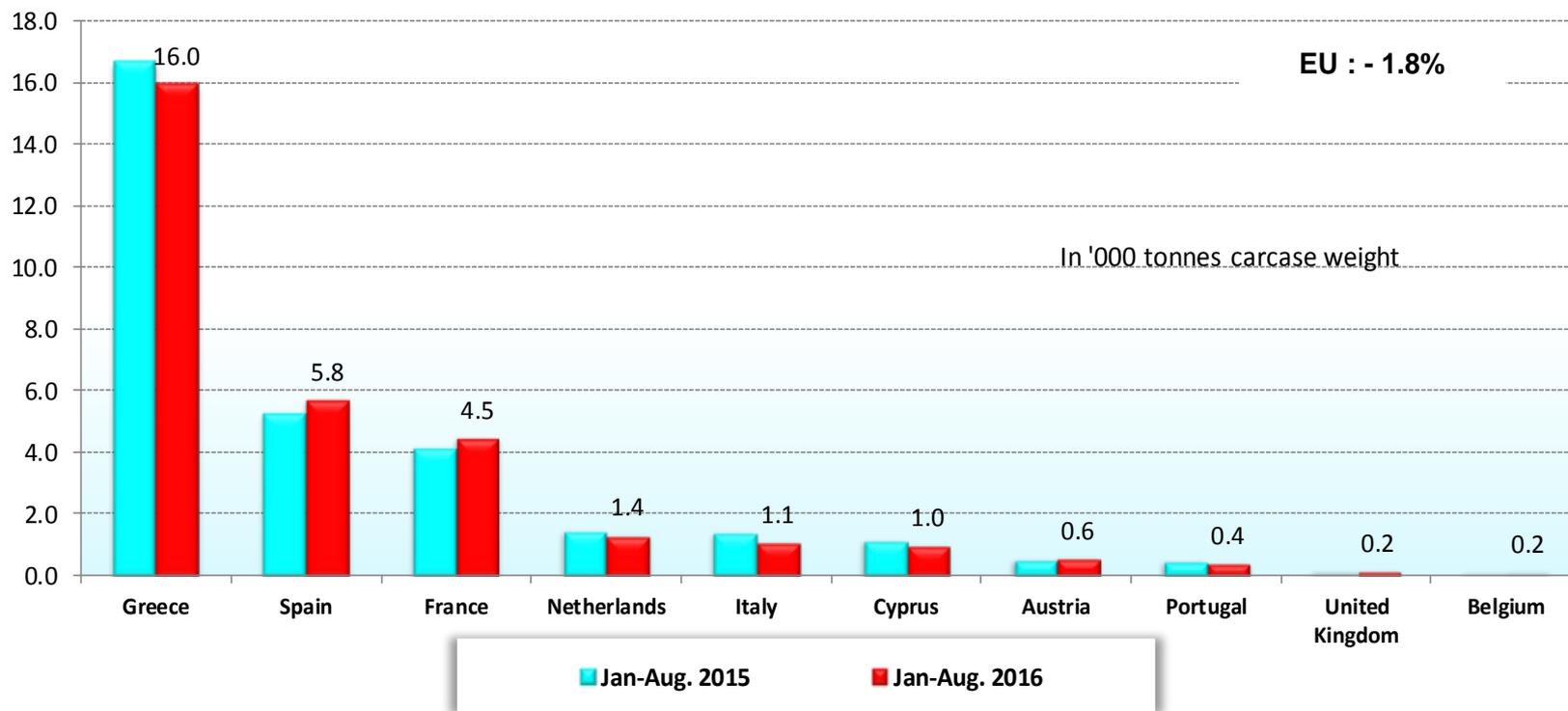


# Production

## Change in Sheep Slaughtering 2015/2016 (up to August)



## Change in Goat Slaughtering 2015/2016 (up to August)





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Commission



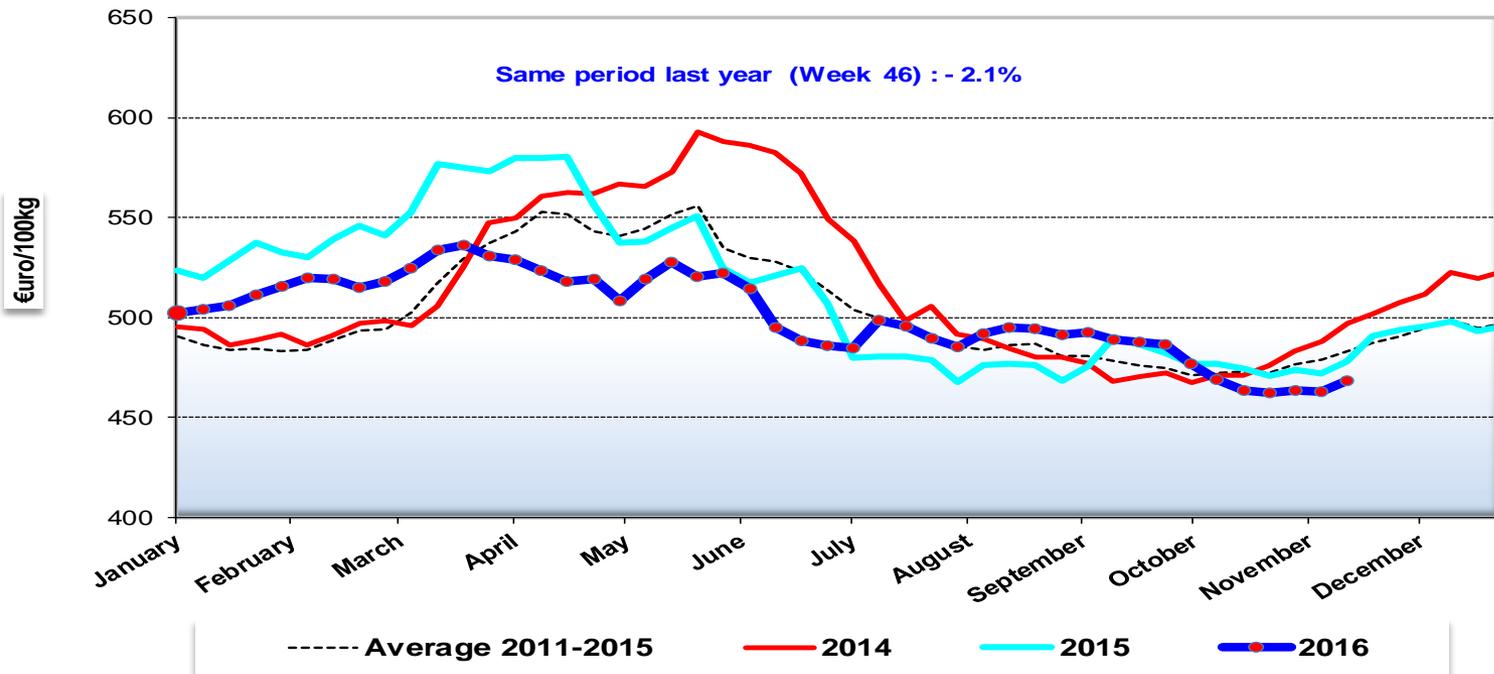
# Prices



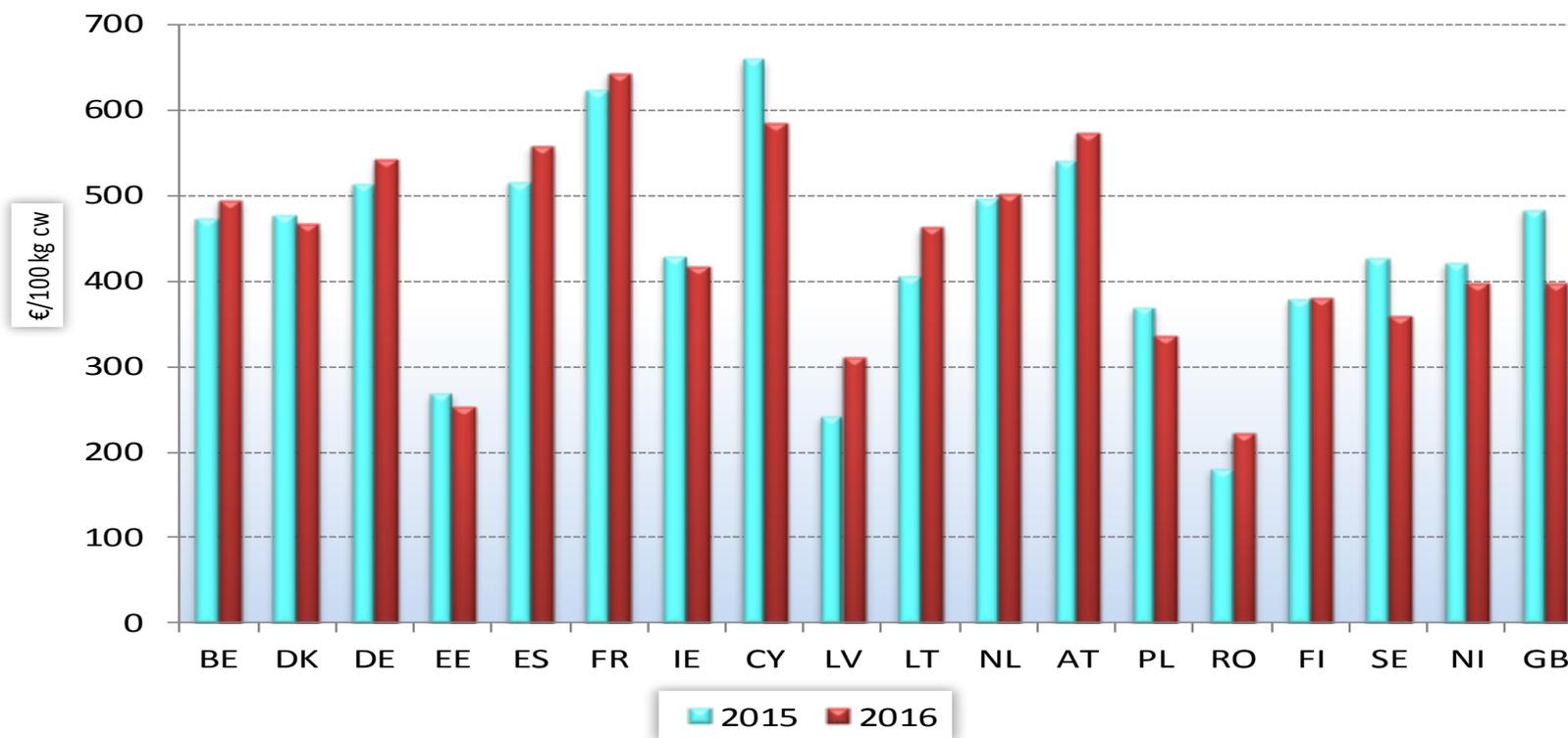
European  
Commission

## Evolution **heavy** lamb prices in the EU

Latest price (Week 46) : 468.51 EUR/100 kg



## Heavy lamb prices (week 46)

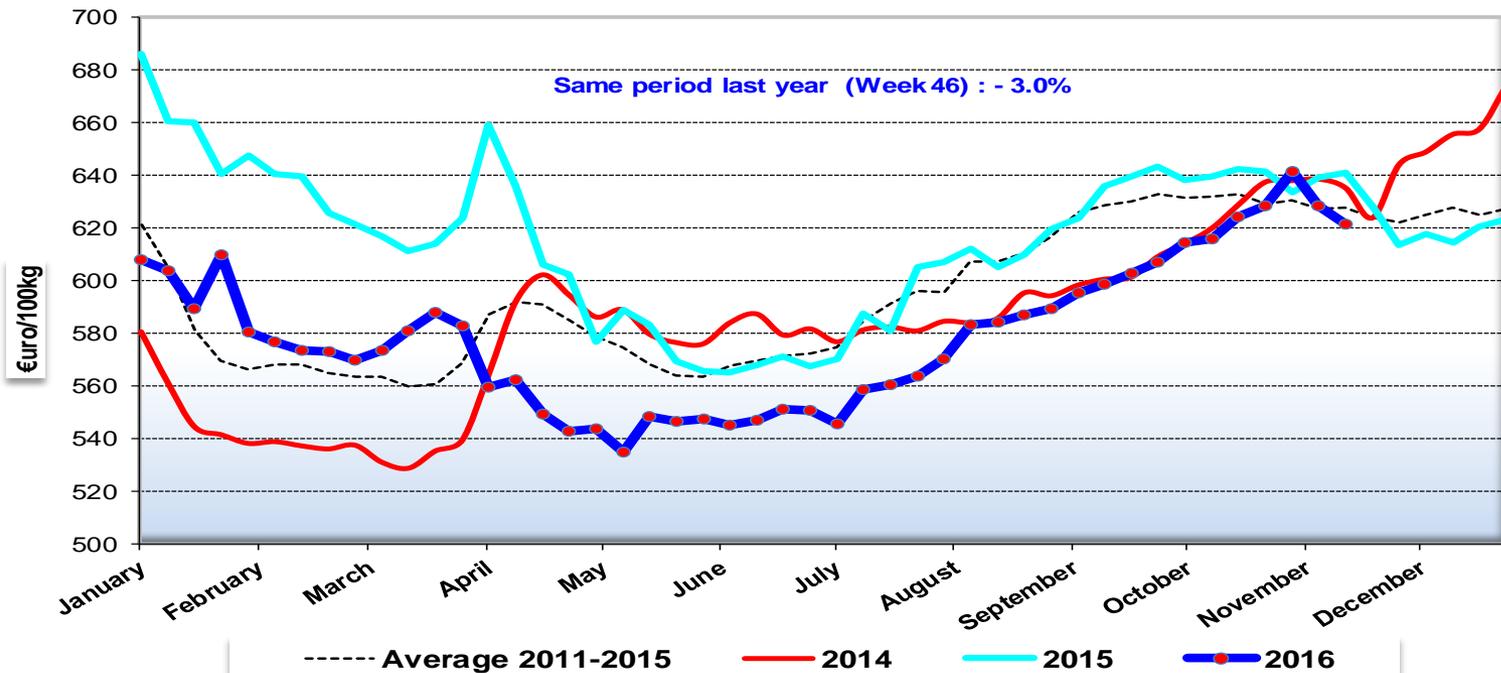




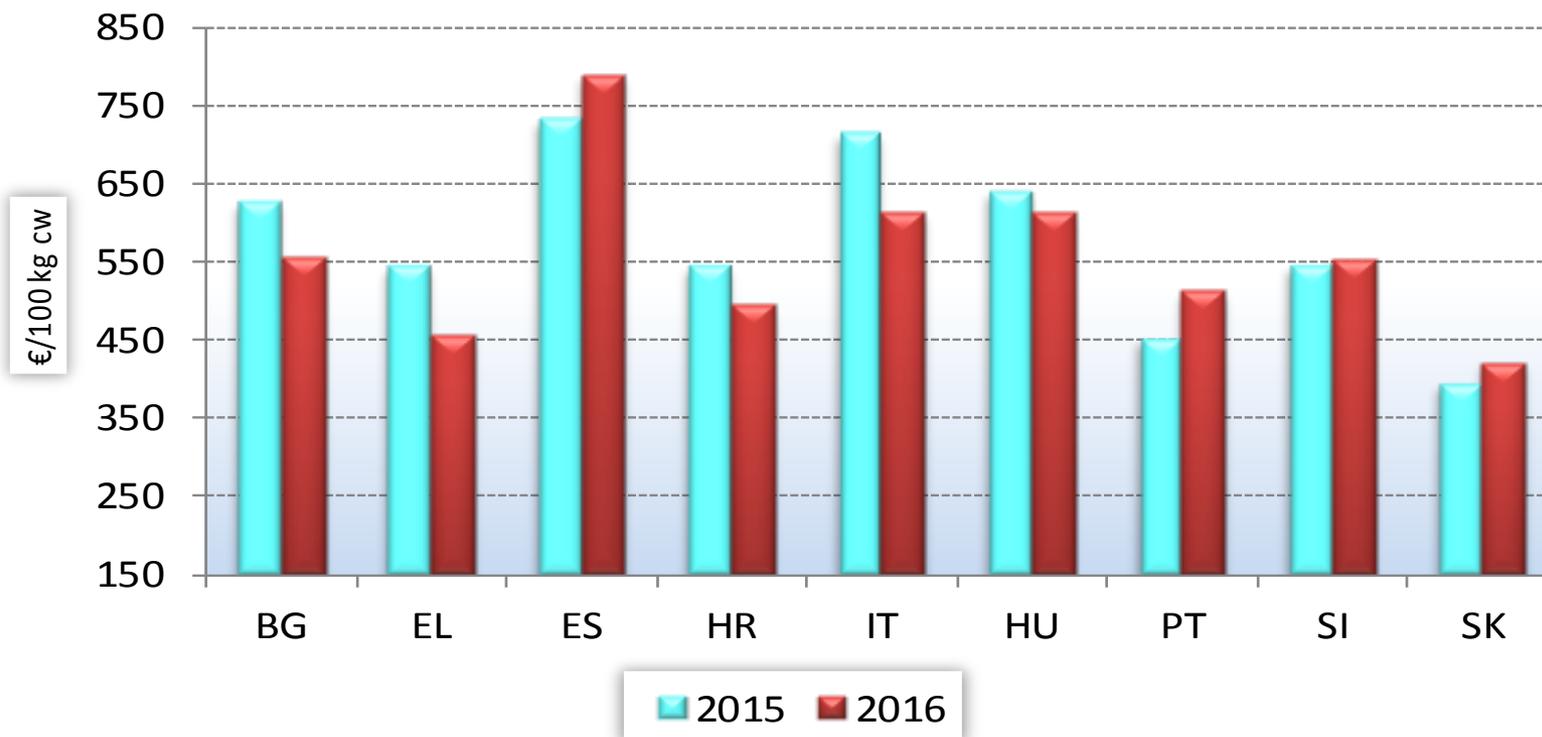
European  
Commission

## Evolution **light** lamb prices in the EU

Latest price (Week 46) : 621.39 EUR/100 kg



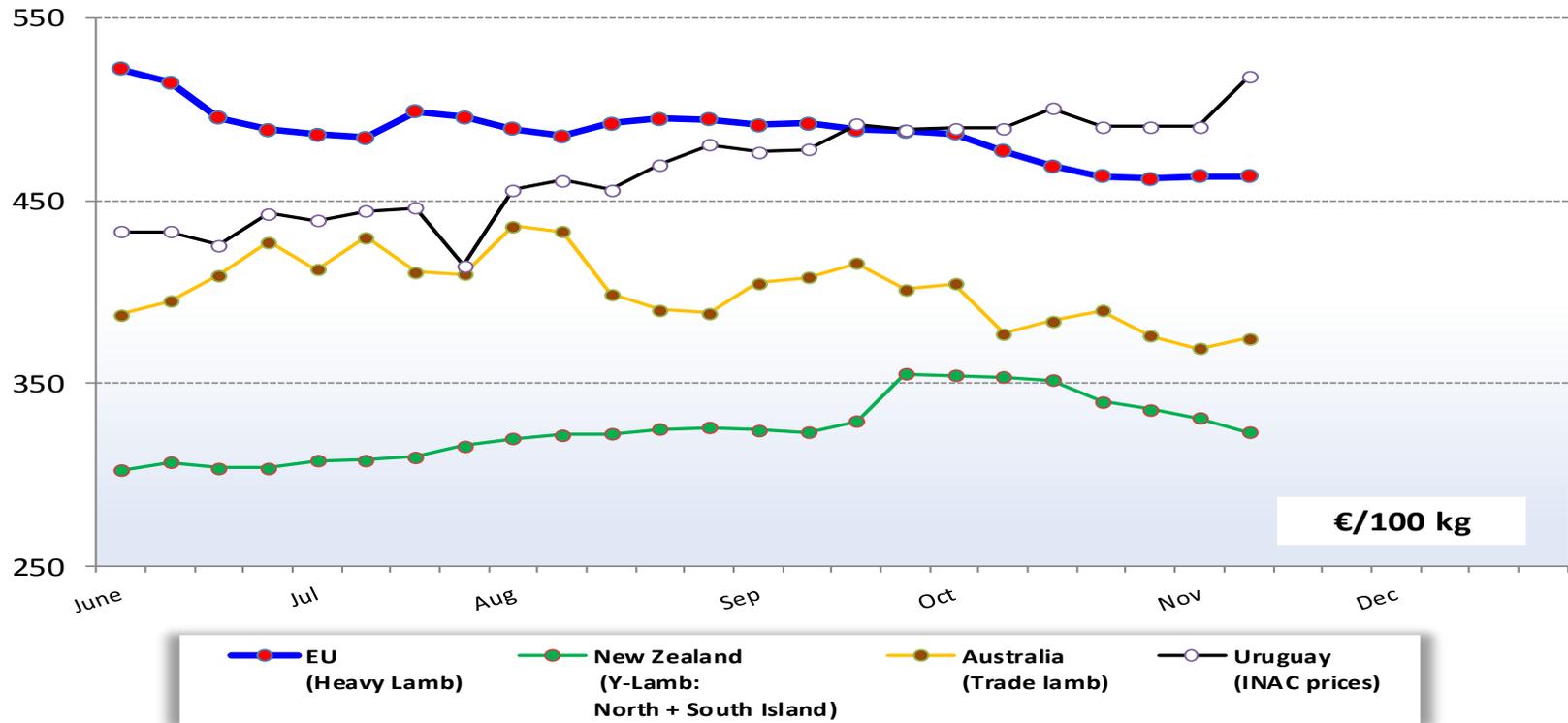
## Light lamb prices (week 46)





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## Market Prices (2016)





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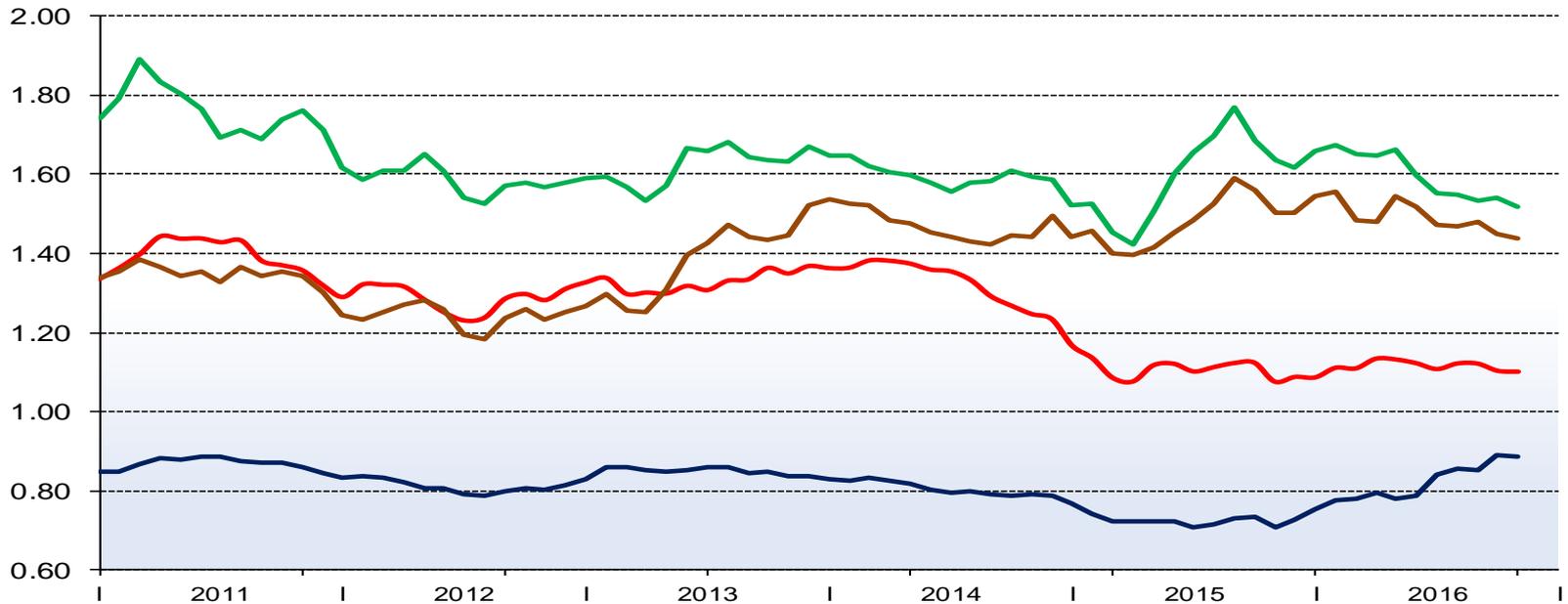


# Trade



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## EXCHANGE RATE

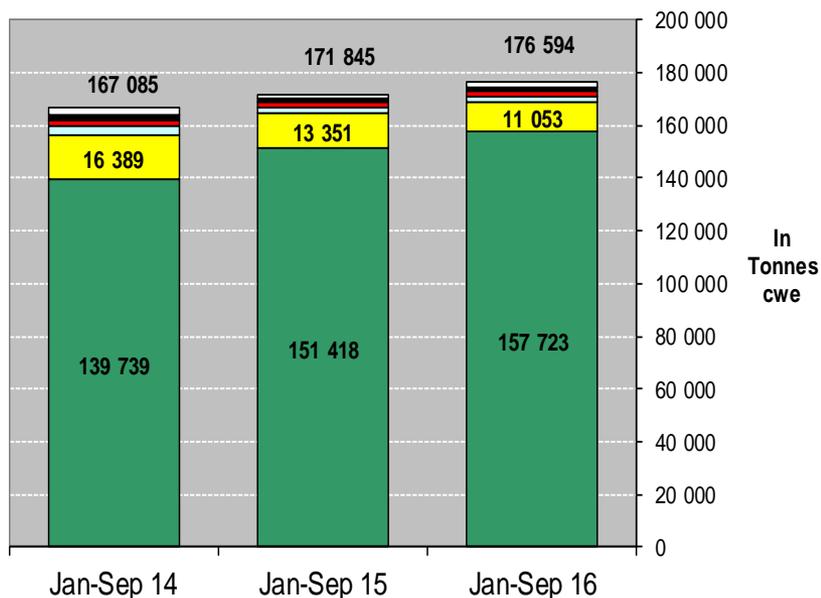


<http://ec.europa.eu/budget/inforeuro/index.cfm>

— GBP — USD — AUD — NZD

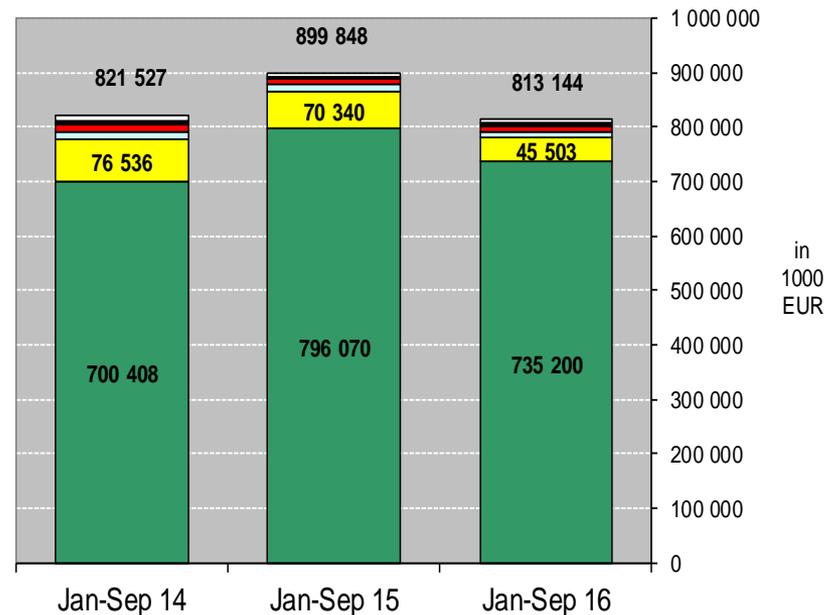
## EU imports of sheep & goatmeat and live animals Trade figures (COMEXT)

### EU IMPORTS of Sheep & Goat (Tonnes cwe)



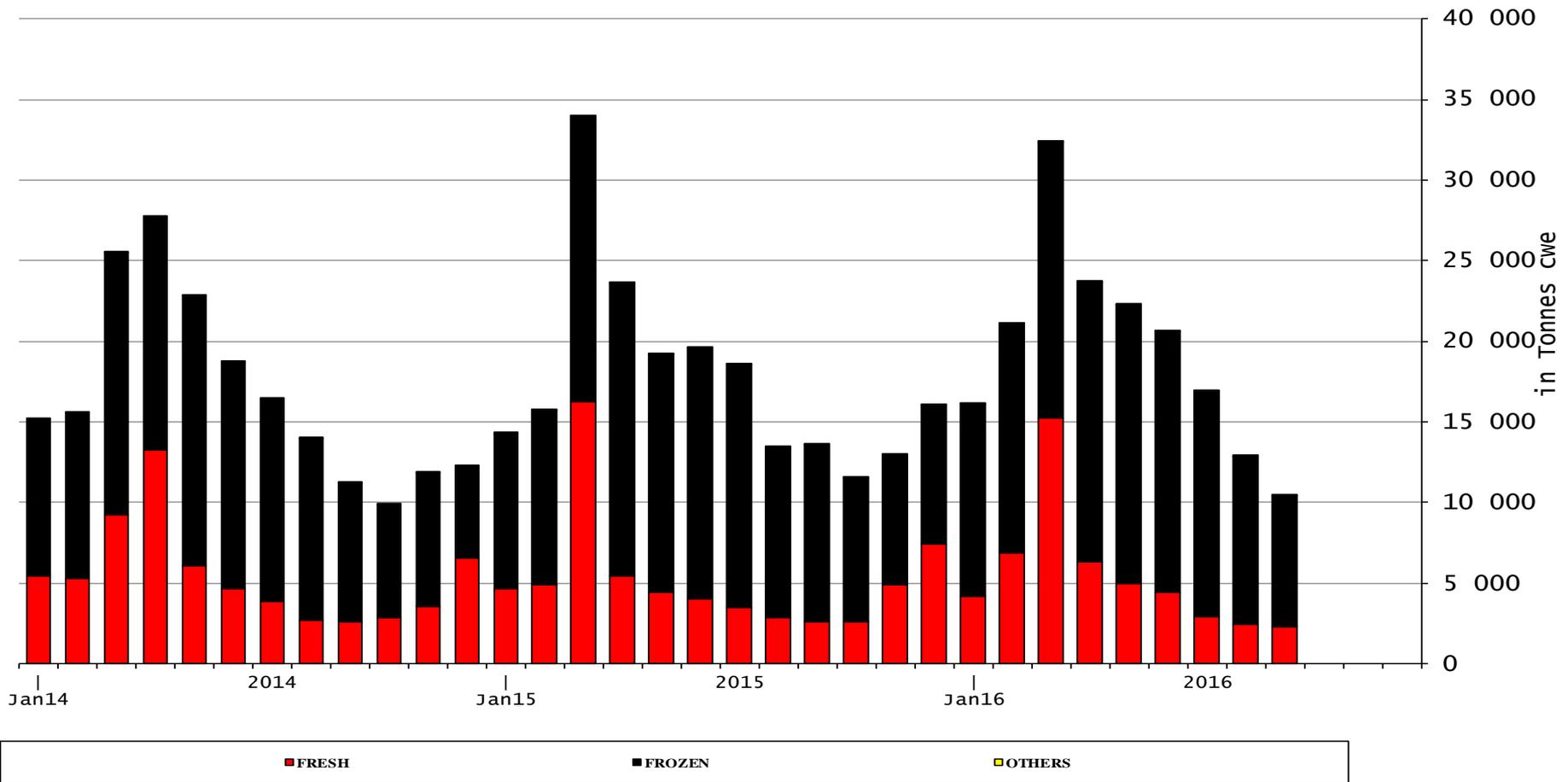
■ New Zealand   
 ■ Australia   
 ■ Chile   
 ■ For.JRep.Mac   
 ■ Uruguay   
 ■ Other origins

### EU IMPORTS of Sheep & Goat (1000 EUR)



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

## EU-28 Imports of Sheep and Goat products



## UTILISATION OF SHEEPMEAT AND GOATMEAT TARIFF QUOTAS IN 2016

EU-28 : **January > December 2016**

Reg. 1354/2011

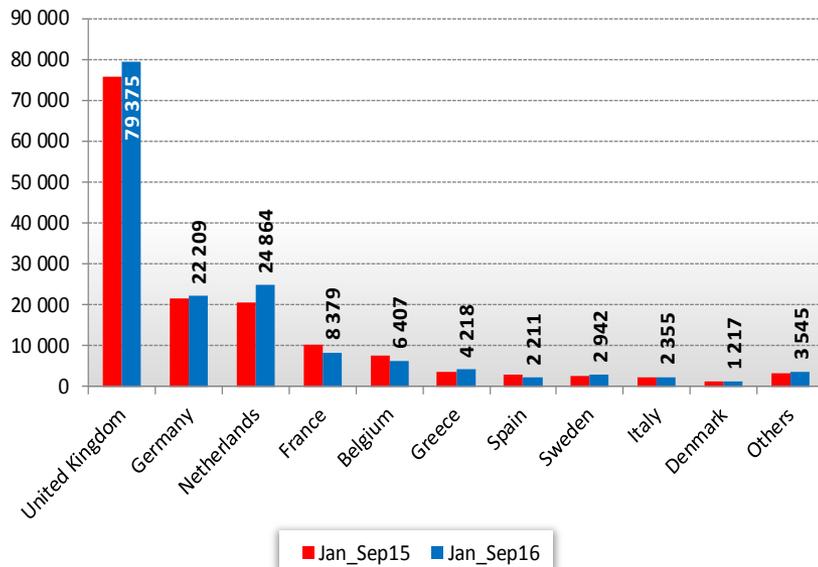
COUNTRY GROUP No	CN CODES	ORIGIN	ORDER NUMBER	Period: <b>01/01/2016 - 01/11/2016</b> Unit: tonnes cwe				
				Annual quota	Balance (remaining amount)	Actual import	Quota use %	Period: 01/01/2015 - 31/12/2015
<b>1</b>	0204	Argentina	09.2011	23 000	22 203	797	3%	534
		Australia	09.2012	19 186	6 430	12 756	66%	16 493
		New Zealand	09.2013	228 254	69 077	159 177	70%	174 540
		Uruguay	09.2014	5 800	4 496	1 304	22%	1 785
		Chile	09.1922	7 600	5 231	2 369	31%	2 503
		Norway	09.0781	300	299	1	0%	0
		Greenland	09.0693	100	100	0	0%	0
		Faeroes	09.0690	20	20	0	1%	1
		Turkey	09.0227	200	200	0	0%	0
		Others	09.2015	200	200	0	0%	0
		Erga Omnes	09.2016	200	14	186	93%	195
<b>2</b>	0204 0210 99 21 0210 99 29 0210 99 60	Iceland	09.0790	1 850	534	1 316	71%	1 093
<b>3</b>	0104 10 30 0104 10 80 0104 20 90	Erga Omnes	09.2019	92	92	0	0%	0
<b>TOTAL</b>				<b>286 802</b>	<b>108 896</b>	<b>177 906</b>	<b>62%</b>	<b>197 144</b>



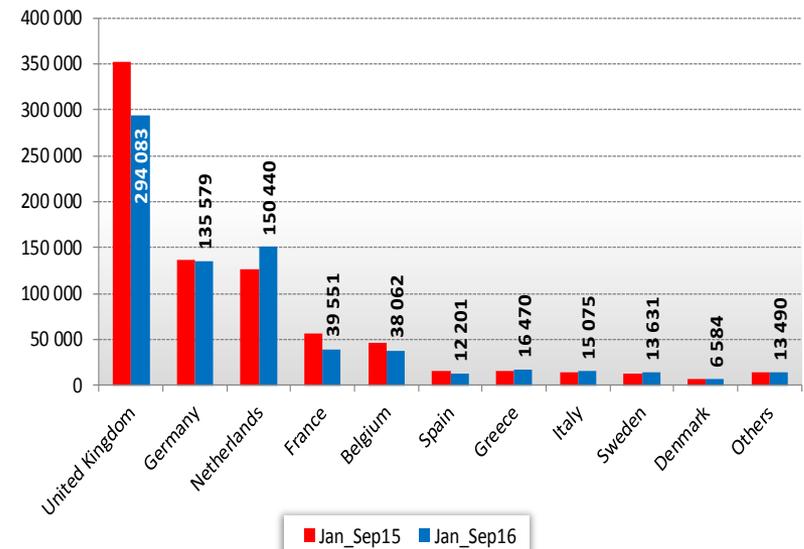
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Commission

## Evolution NZ Exports of sheep meat in MS

NZ Exports to MS  
(In tonnes cw)



NZ Exports to MS  
(In 1000 €)

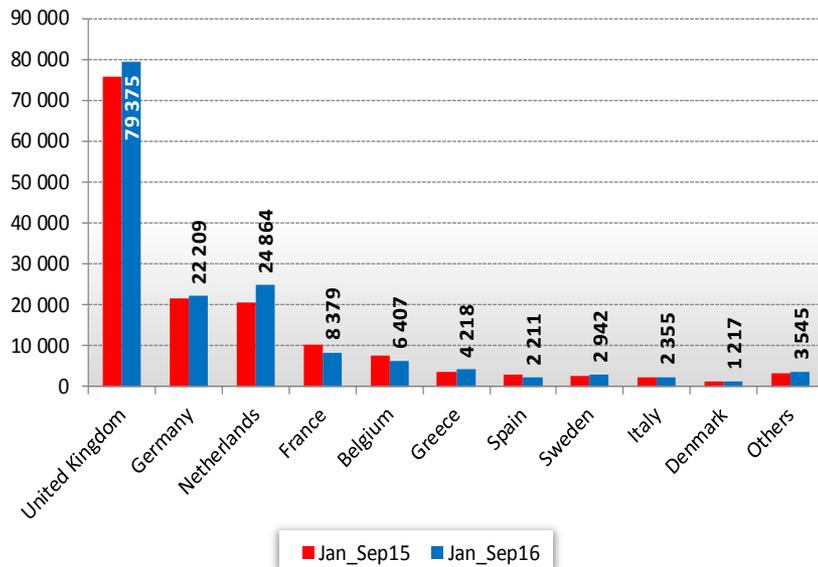




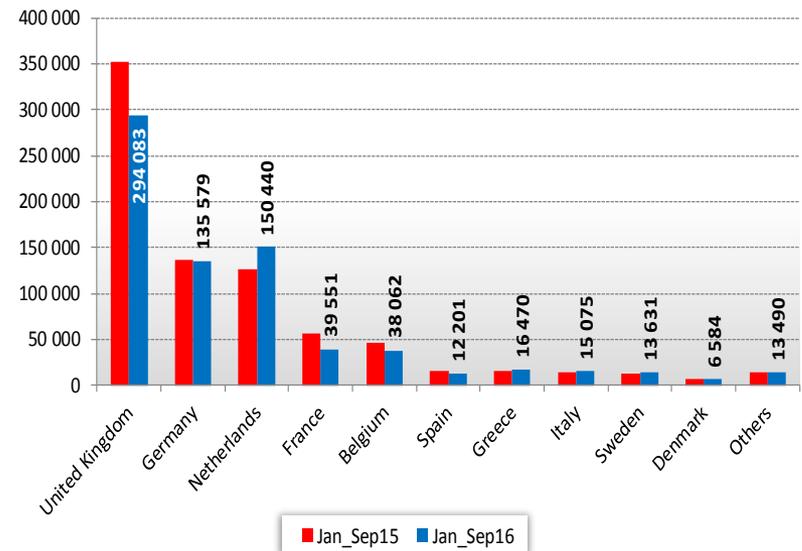
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Commission

## Evolution NZ Exports of sheep meat in MS

NZ Exports to MS  
(In tonnes cw)

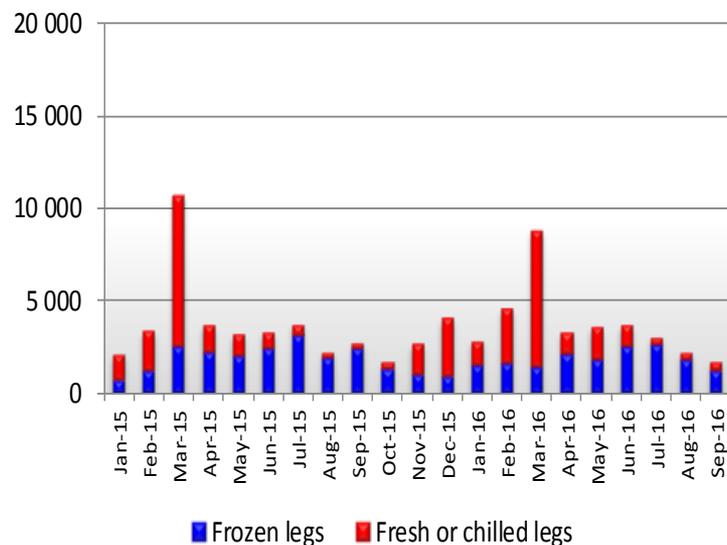


NZ Exports to MS  
(In 1000 €)

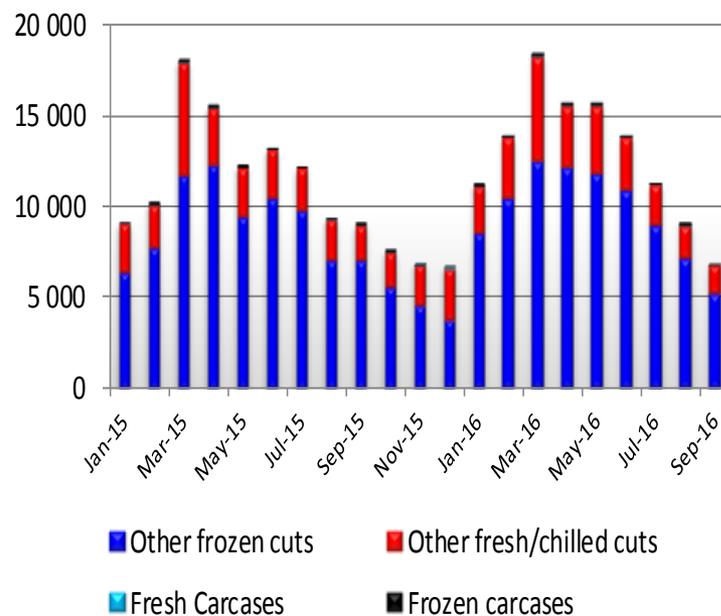


## Evolution NZ Exports of sheep meat products in EU (in tonnes cw)

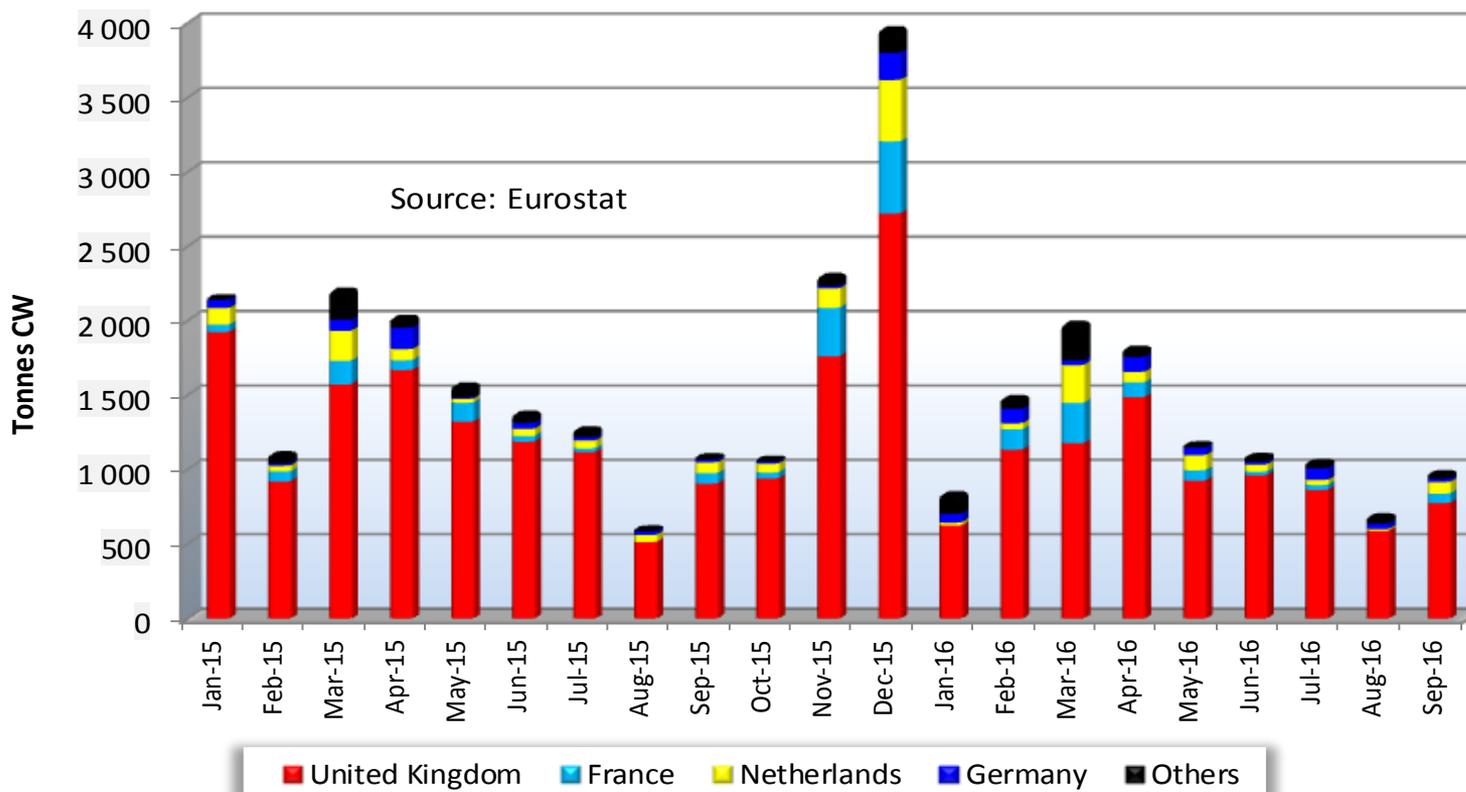
Sheep legs



Other meat products



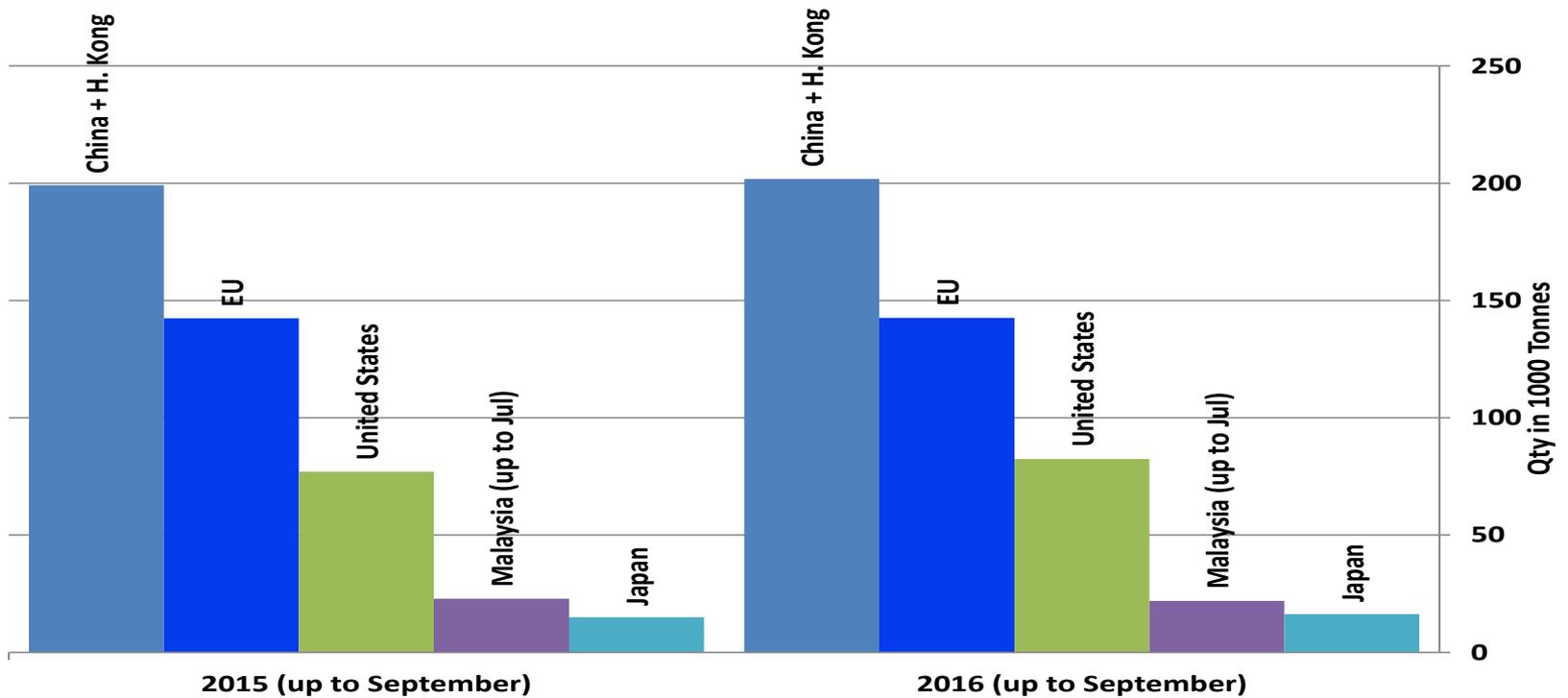
## Evolution AUS exports of sheep meat to the EU





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### Main Importers of SHEEP&Goat Products (up to September)

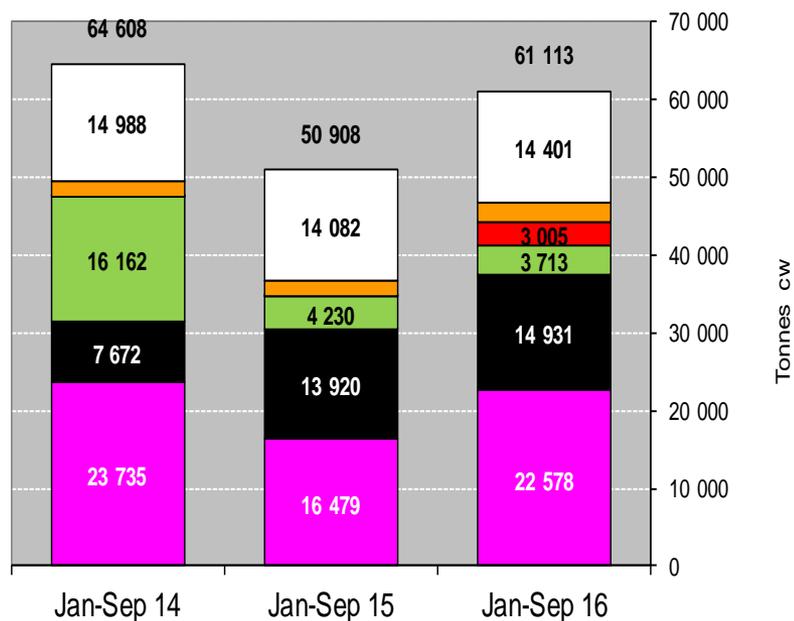


Source : GTA

Excl. Live animals

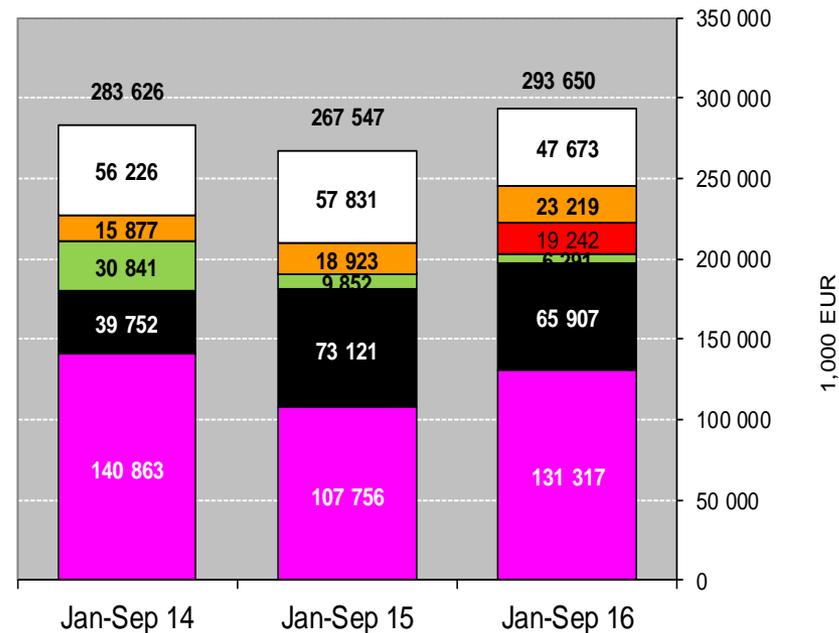
## EU exports of sheep & goatmeat and live animals Trade figures (COMEXT)

### EU EXPORTS of Sheep & Goat (Tonnes cwe)



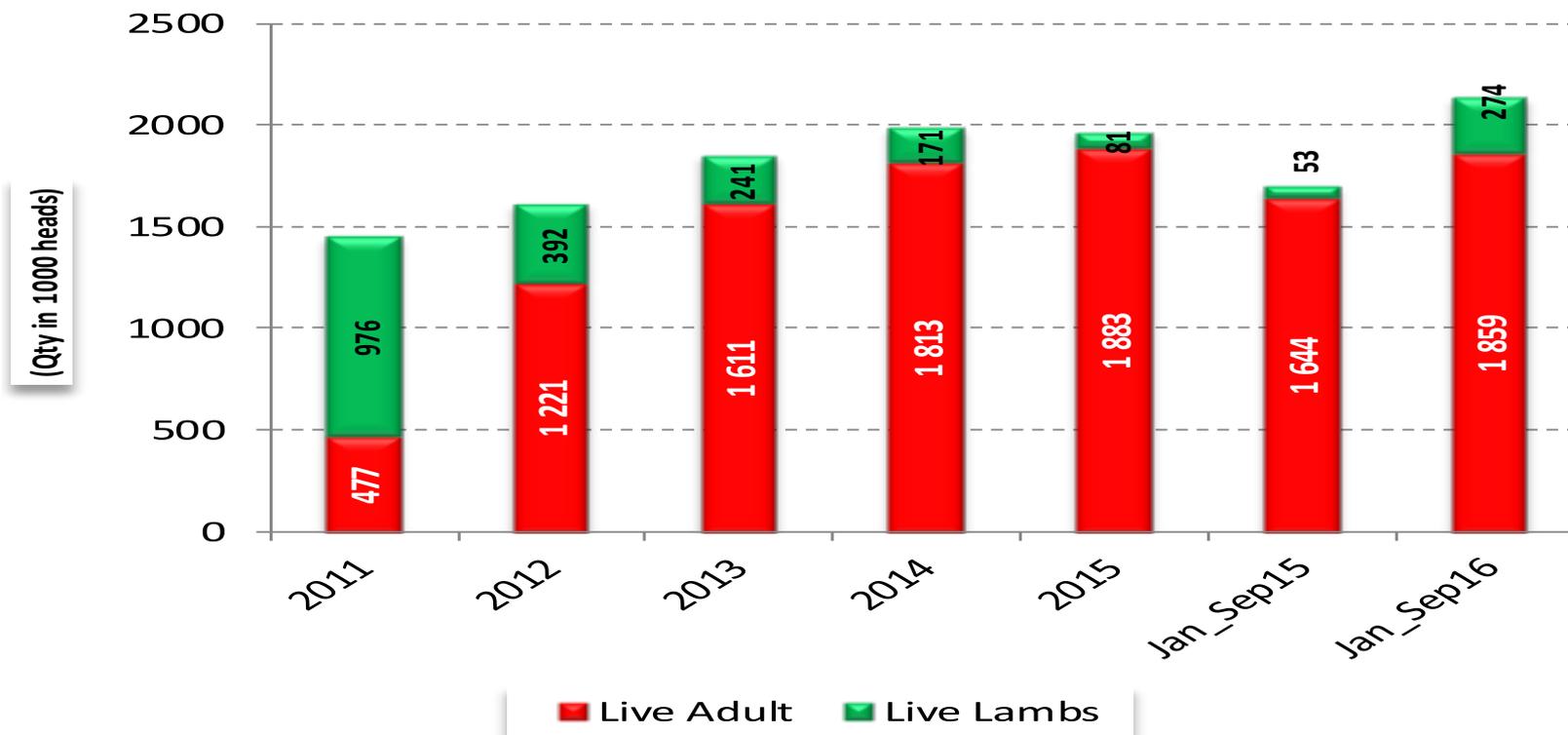
■ Libya  
 ■ Jordan  
 ■ Hong Kong  
 ■ Israel  
 ■ Switzerland  
 ■ Other destinations

### EU EXPORTS of Sheep & Goat (1000 EUR)

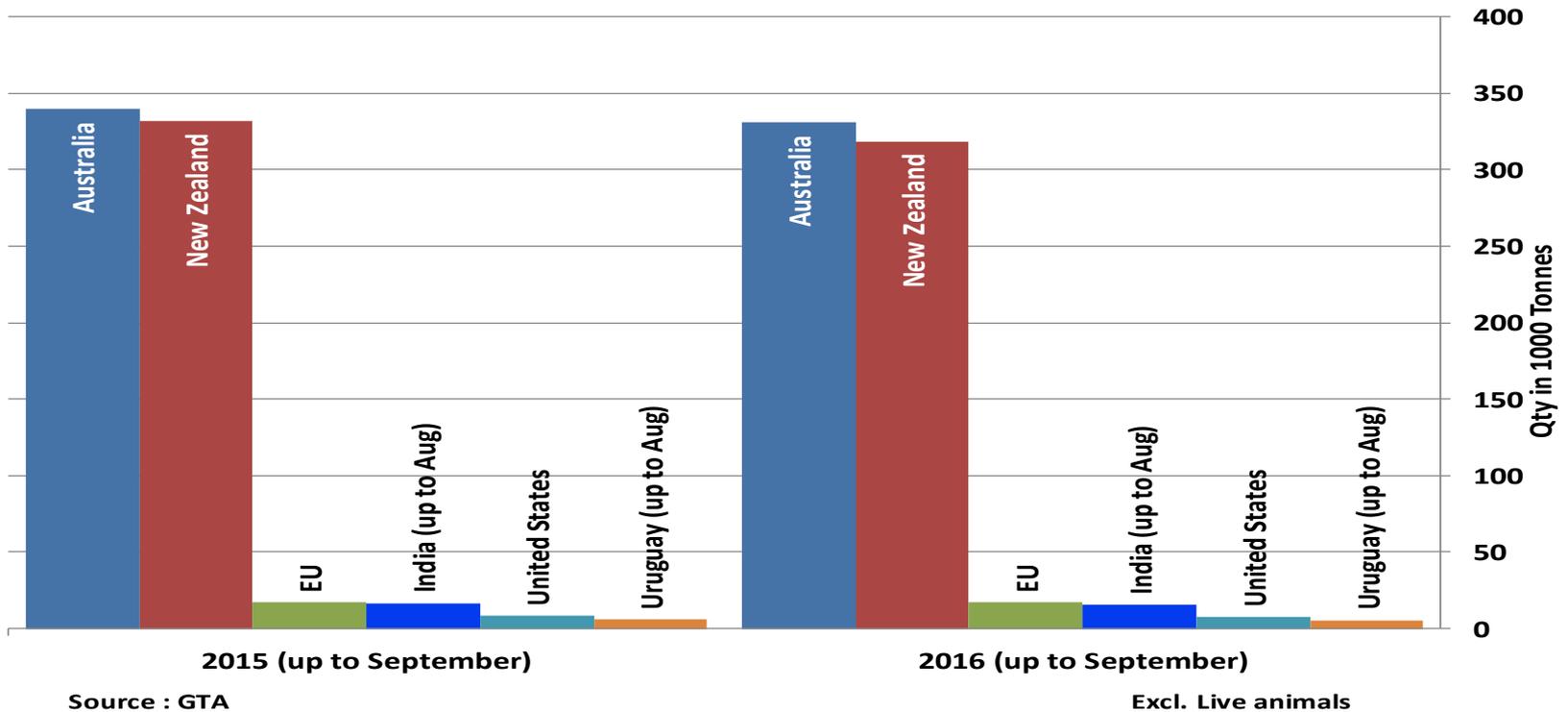


■ Libya  
 ■ Jordan  
 ■ Hong Kong  
 ■ Israel  
 ■ Switzerland  
 ■ Other destinations

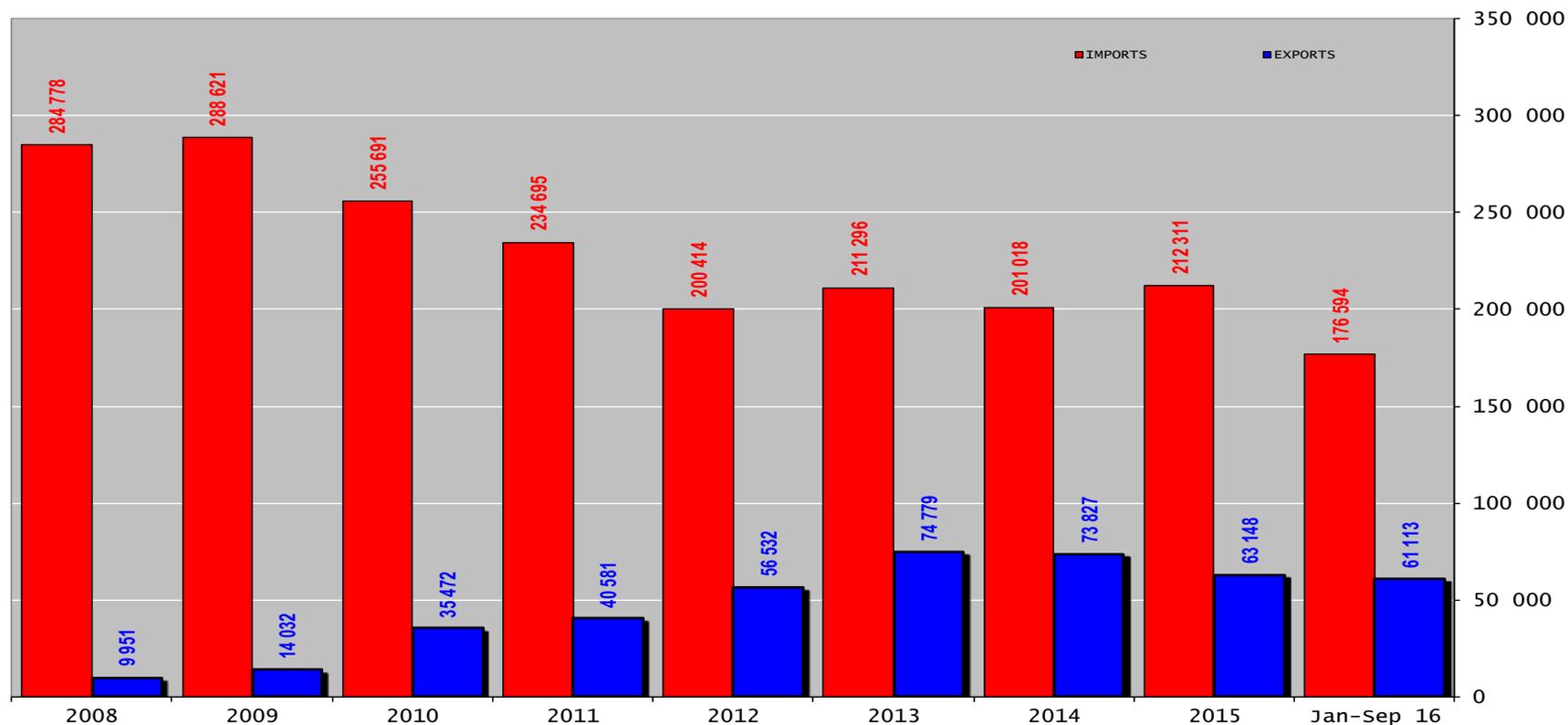
## Evolution exports of live sheep (Excluding pure-bred breeding)



### Main Exporters of SHEEP&GOAT Products (up to September)



## ■ EU Sheep and Goat Meat Trade Balance, tonnes cwe





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# Outlook

## Estimates of NOVEMBER 2016

### FORECAST WORKING GROUP - SHEEP LIVESTOCK BALANCE (Thousand Heads)

		2013	2014	2015	2016(f)	2017(f)	15/14 %	16/15 %	17/16 %
		Change							
		Sheep numbers in December							
AT		357.4	349.0	353.0	355.0	358.0	+ 1.1%	+ 0.6%	+ 0.8%
BE		118.0	117.0	129.0	105.0	105.0	+ 10.3%	- 18.6%	+ 0.0%
BG		1 370.0	1 334.0	1 225.0	1 225.3	1 300.0	- 8.2%	+ 0.0%	+ 6.1%
DE		1 570.0	1 601.0	1 580.0	1 600.0	1 620.0	- 1.3%	+ 1.3%	+ 1.3%
IE		5 007.0	5 097.0	5 139.0	5 176.0	5 200.0	+ 0.8%	+ 0.7%	+ 0.5%
EL		9 520.0	8 948.0	8 948.0	9 216.0	8 950.0	+ 0.0%	+ 3.0%	- 2.9%
ES		16 609.0	16 572.0	16 361.0	16 882.0	16 500.0	- 1.3%	+ 3.2%	- 2.3%
FR		7 193.0	7 168.0	7 057.0	6 916.0	6 812.0	- 1.5%	- 2.0%	- 1.5%
HR		620.0	531.2	535.0	547.7	570.6	+ 0.7%	+ 2.4%	+ 4.2%
HU		1 214.0	1 185.0	1 190.0	1 235.0	1 235.0	+ 0.4%	+ 3.8%	+ 0.0%
IT		7 181.8	7 166.0	7 148.5	7 204.4	7 132.3	- 0.2%	+ 0.8%	- 1.0%
LV		84.8	92.6	105.7	118.0	125.0	+ 14.1%	+ 11.6%	+ 5.9%
NL		1 074.0	1 070.0	1 000.0	1 000.0	1 000.0	- 6.5%	+ 0.0%	+ 0.0%
PL		200.0	190.0	180.0	180.0	200.0	- 5.3%	+ 0.0%	+ 11.1%
PT		2 074.0	2 033.0	2 043.0	2 023.0	2 023.0	+ 0.5%	- 1.0%	+ 0.0%
RO		9 136.0	9 518.0	9 810.0	13 421.0	14 092.0	+ 3.1%	+ 36.8%	+ 5.0%
SE		576.8	588.8	594.7	586.4	594.0	+ 1.0%	- 1.4%	+ 1.3%
SK		389.4	377.4	372.5	376.0	378.0	- 1.3%	+ 0.9%	+ 0.5%
UK		22 027.0	22 687.0	23 103.0	23 300.0	23 300.0	+ 1.8%	+ 0.9%	+ 0.0%
EU heads	Total	86 322.2	86 625.0	86 874.4	91 466.8	91 494.9			
	Change	- 2.3%	+ 0.4%	+ 0.3%	+ 5.3%	+ 0.0%	+ 0.3%	+ 5.3%	+ 0.0%

Red figures - No communication received - Estimated data

### Estimates of NOVEMBER 2016

#### FORECAST WORKING GROUP - SHEEP AND GOAT MEAT (Thousand Tonnes)

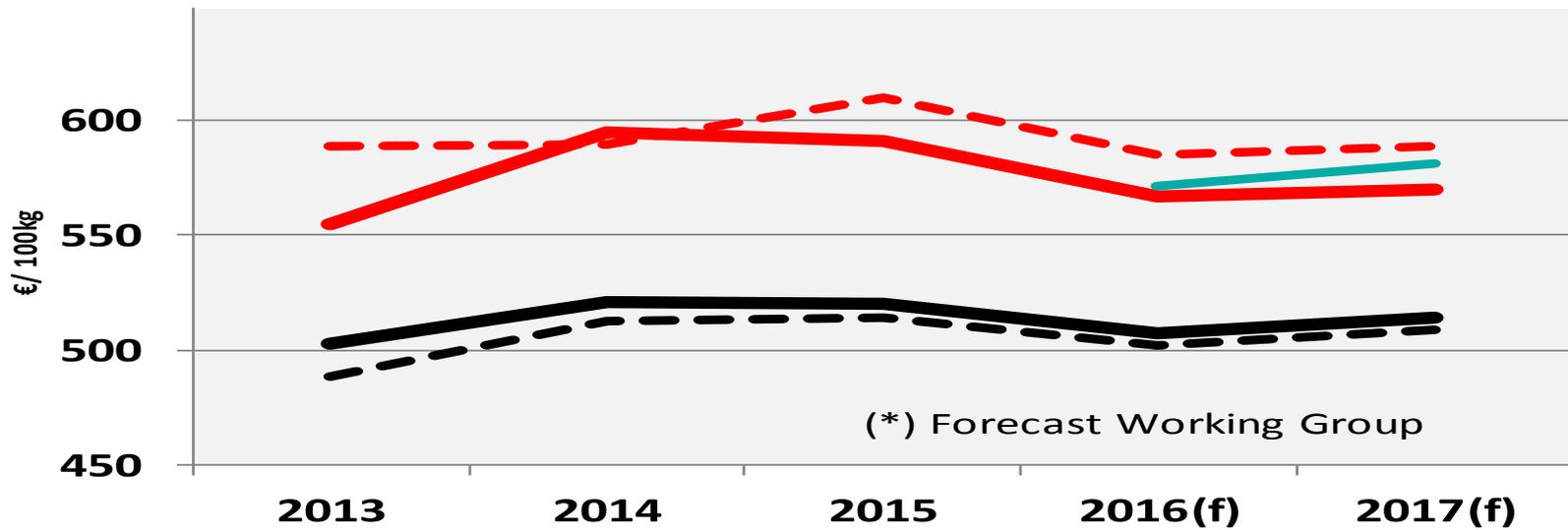
		2013	2014	2015	2016(f)	2017(f)	Change		
							15/14 %	16/15 %	17/16 %
<b>GIP/ PIB/ BEE</b>									
AT		8.0	8.0	8.0	8.0	8.0	+ 0.0%	+ 0.0%	+ 0.0%
BE		0.6	0.7	1.0	0.7	0.7	+ 42.9%	- 30.0%	+ 0.0%
BG		10.0	9.0	9.0	9.0	9.5	+ 0.0%	+ 0.0%	+ 5.6%
DE		36.0	32.0	32.0	33.5	33.7	+ 0.0%	+ 4.7%	+ 0.6%
IE		57.0	58.0	58.0	60.0	61.0	+ 0.0%	+ 3.4%	+ 1.7%
EL		98.0	80.0	72.0	80.0	80.0	- 10.0%	+ 11.1%	+ 0.0%
ES		127.2	112.0	110.0	120.0	110.0	- 1.8%	+ 9.1%	- 8.3%
FR		86.0	87.0	87.0	88.0	87.0	+ 0.0%	+ 1.1%	- 1.1%
HR		7.3	6.9	7.4	8.0	8.4	+ 7.3%	+ 8.8%	+ 4.2%
HU		3.0	3.1	3.2	3.7	3.7	+ 2.9%	+ 16.0%	+ 0.0%
IT		35.5	26.6	35.4	32.2	31.4	+ 33.1%	- 9.0%	- 2.5%
LV		2.6	2.7	3.1	2.4	2.8	+ 11.7%	- 21.3%	+ 16.7%
NL		16.4	16.7	16.3	16.3	16.3	- 2.4%	+ 0.0%	+ 0.0%
PL		2.0	2.0	2.0	2.0	2.0	+ 0.0%	+ 0.0%	+ 0.0%
PT		11.0	11.0	11.0	11.0	11.0	+ 0.0%	+ 0.0%	+ 0.0%
RO		50.5	48.7	50.7	75.9	59.0	+ 4.1%	+ 49.7%	- 22.3%
SE		4.9	5.1	5.1	5.1	4.2	+ 0.6%	- 0.6%	- 17.5%
SK		1.1	1.0	1.3	1.3	1.0	+ 24.7%	- 1.6%	- 19.7%
UK		290.0	298.0	300.0	291.0	295.0	+ 0.7%	- 3.0%	+ 1.4%
EU Tonnes	Total	847.1	808.6	812.5	848.1	824.7			
	EU tonnes	- 0.9%	- 4.5%	+ 0.5%	+ 4.4%	- 2.8%	+ 0.5%	+ 4.4%	- 2.8%

Red figures - No communication received - Estimated data



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## Price forecast for Lamb and goat meat (based on FWG (\*) experts or weekly data)

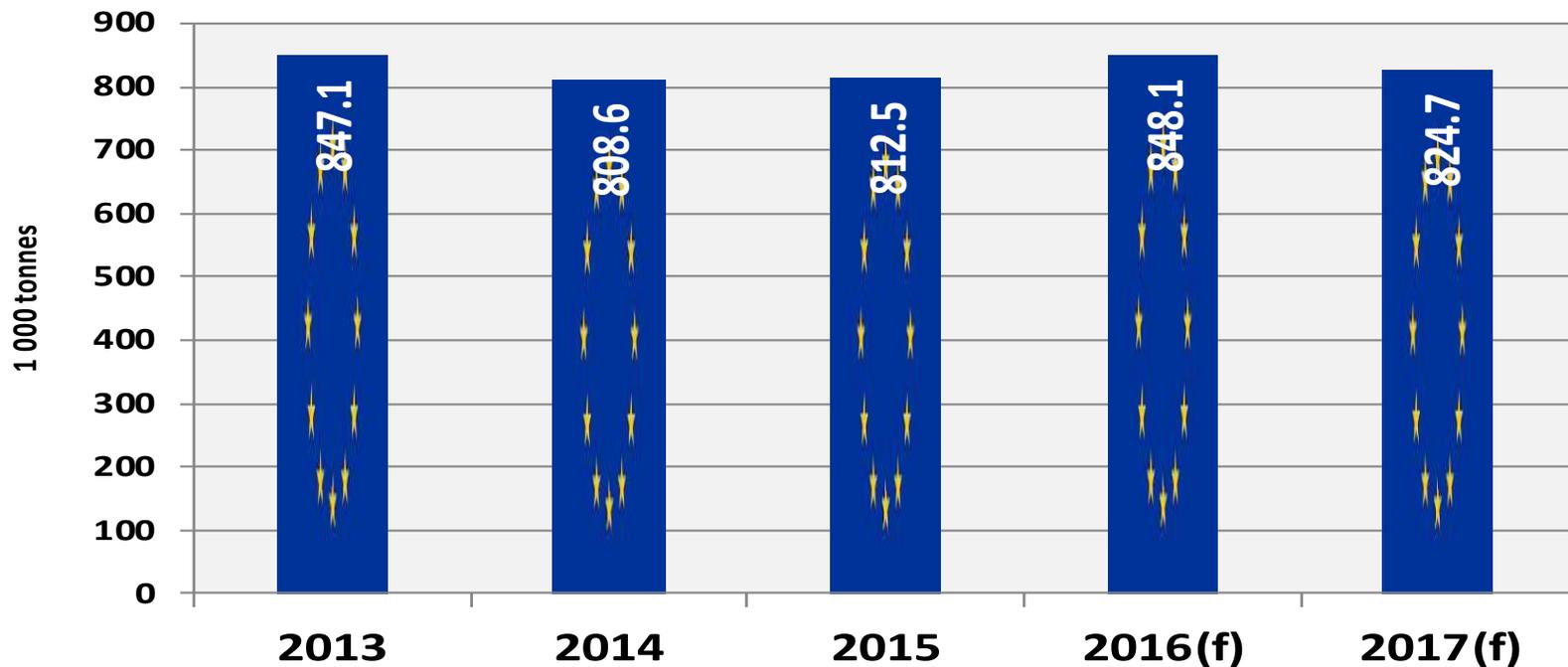


— Heavy Lamb "expert prices"  
— Light Lamb "expert prices"  
— Goat "expert prices"

--- EU 28 Heavy lamb weekly prices  
--- EU 28 Light Lamb weekly prices

## Sheep + goat production balance (Forecasted from FWG experts)

NL - Data estimated  
Non-attending: PL-NL-CY-AT-SE



(\*) Forecast Working Group