



SHEEP AND GOAT MEAT

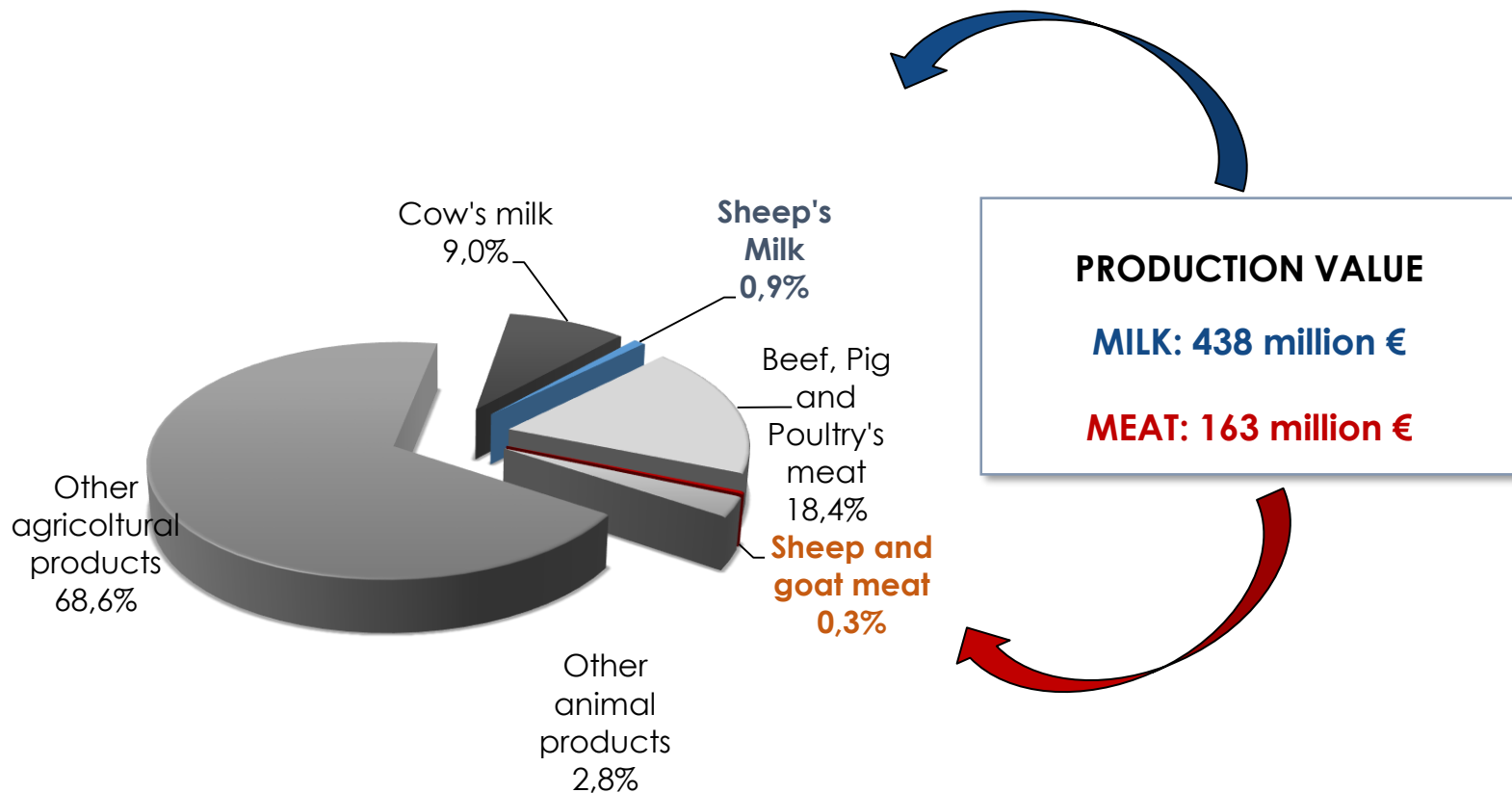
ITALY: NATIONAL MARKET SITUATION

Giugno 2018

SECTOR SIZE AND VALUE

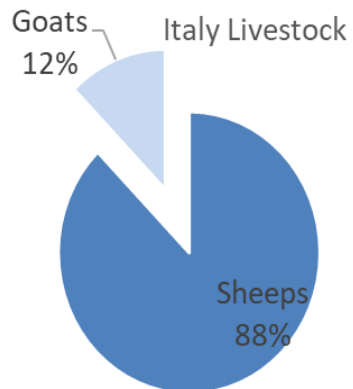


WEIGHT ON NATIONAL AGRICULTURAL SECTOR (2017)

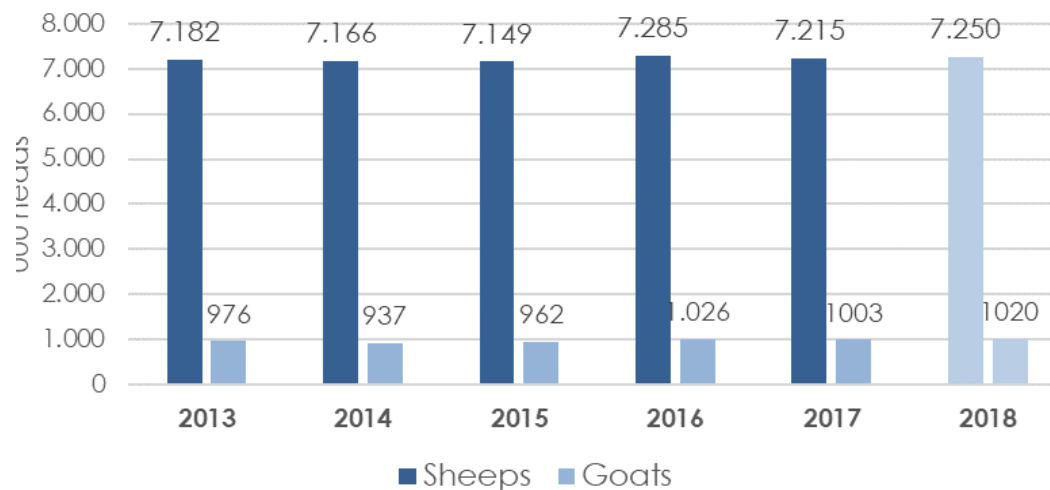


Source: ISMEA calculations on ISTAT data

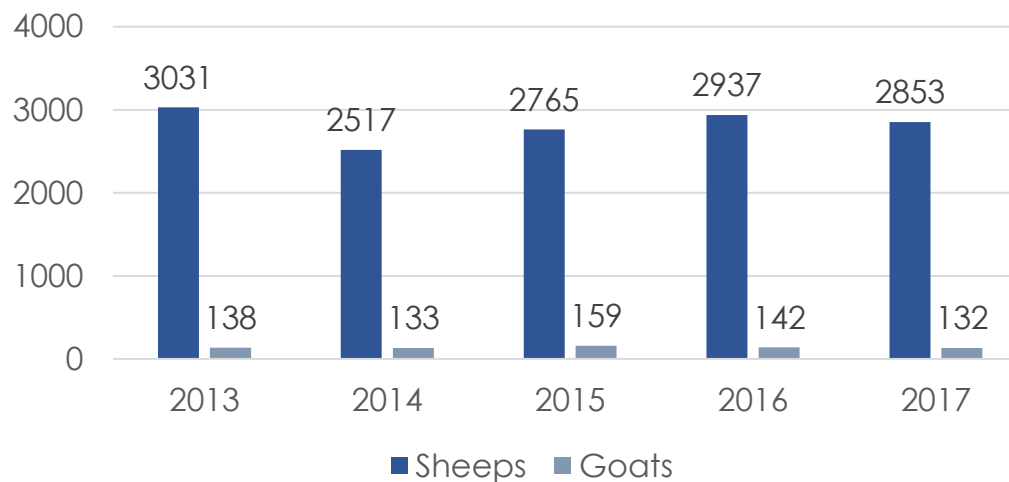
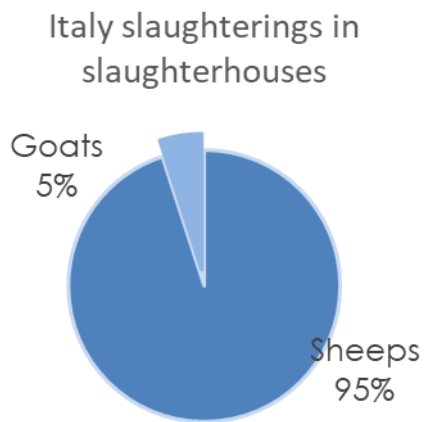
ITALY: SUPPLY



Sheep and Goat livestock (000 heads)



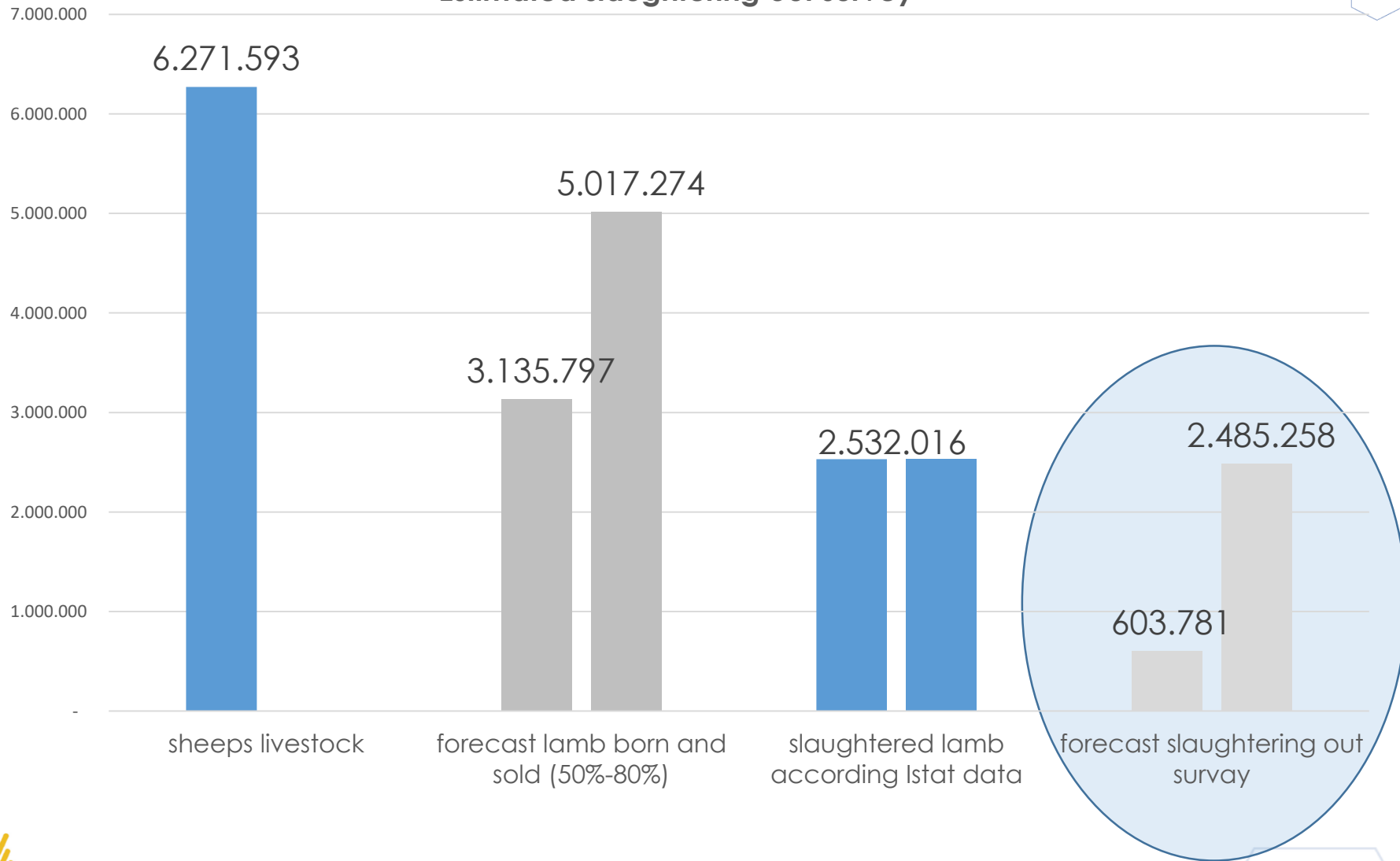
Slaughterings in 000 heads



SLAUGHTERINGS



Estimated slaughtering out survey



SLAUGHTERINGS – MEAT PRODUCTION



Sheep and goat slaughtering (tons - cwe)

	2015	2016	2017	Var%2017/16	Share	2018
Sheep, of which:	33.632	31.308	33.251	6%	95%	
- Light lamb	18.721	18.618	20.591	11%	62%	0,5%
- Heavy lamb	4.430	3.350	3.415	2%	10%	1%
- Sheep	10.481	9.340	9.231	-1%	28%	0%
Goats, of which:	1.808	1.616	1.775	10%	5%	
- Goats kids	1.356	993	965,7	-3%	54%	-3%
- Goats and bucks	453	623	808,9	30%	46%	0%
Sheep and Goats	35.440	32.924	35.026	6%	100%	

Fonte: ISTAT

3 PGI for lamb meat



- Agnello di Sardegna
- Abbacchio Romano
- Agnello del Centro Italia

Certified production
value
58 Million €

30%

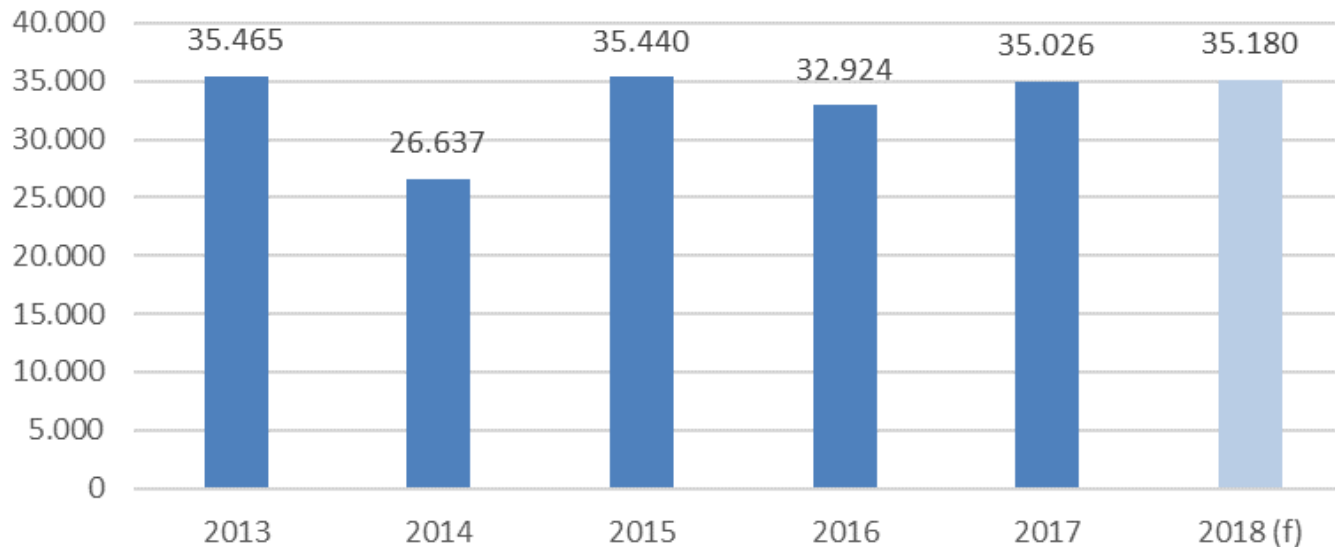
Certified production
volume
6.039 tons

17%

SLAUGHTERING FORECASTS



sheeps and goat's slaughterings (Cwe)



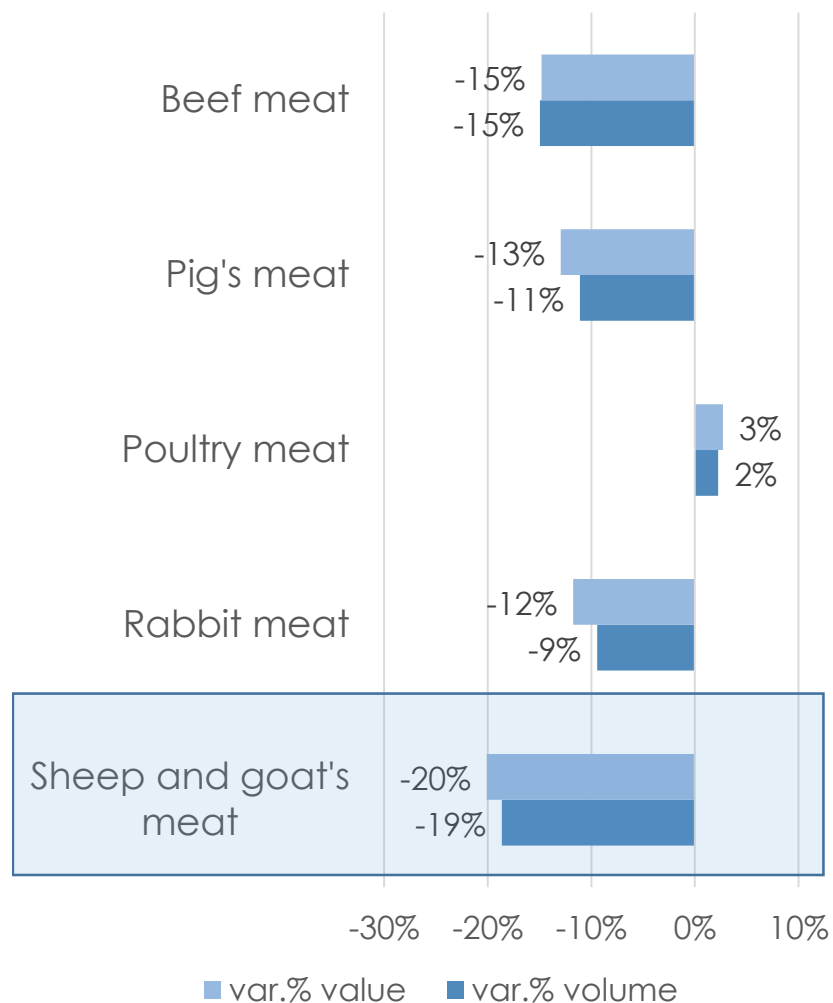
Less goat kids
Less Sheeps
More Lamb
(more heavy)



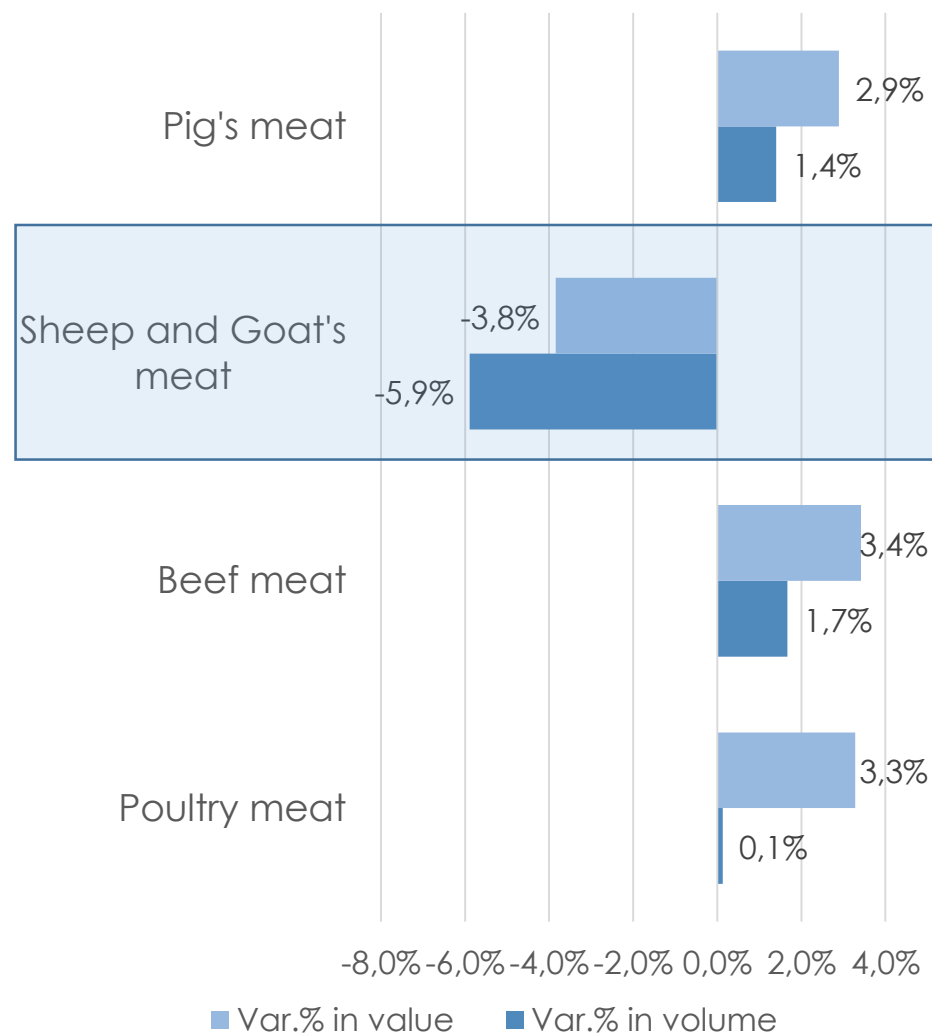
MEAT CONSUMPTION IN LAST 5 YEARS



2016 vs 2012



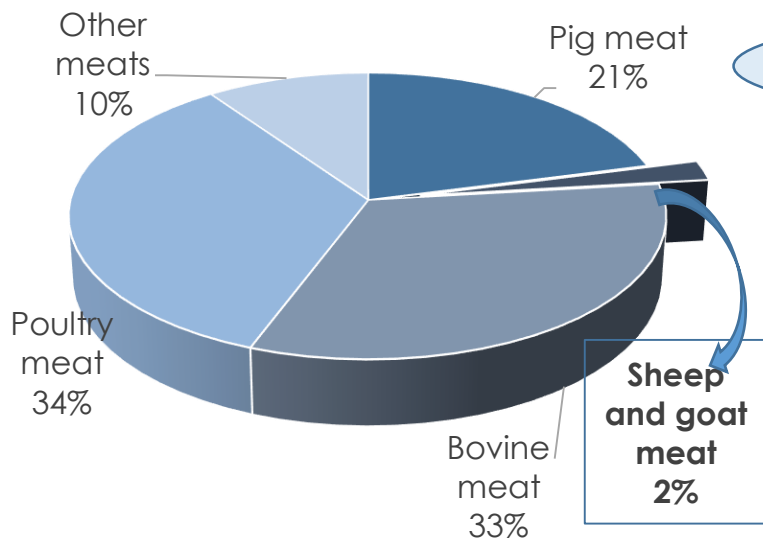
17 vs 16



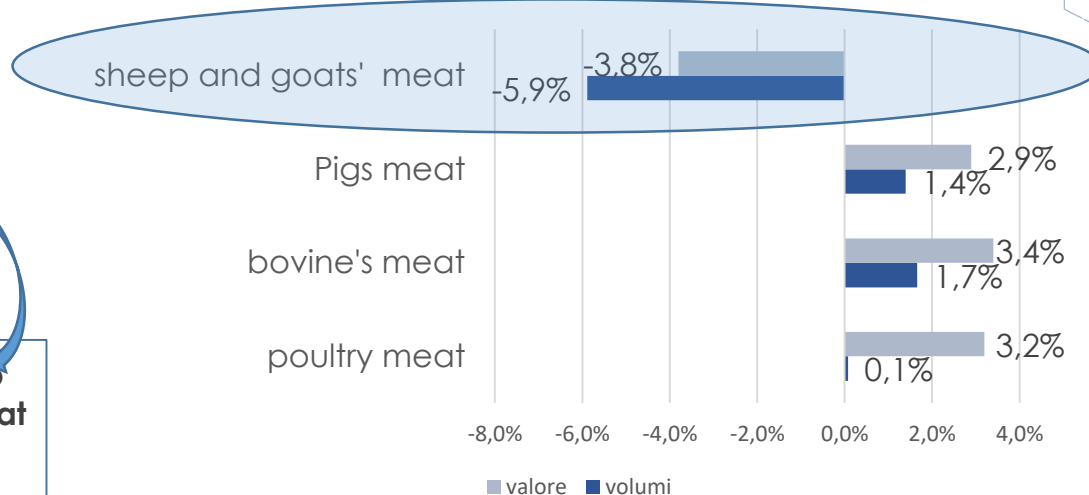
DOMESTIC CONSUMPTION IN 2018



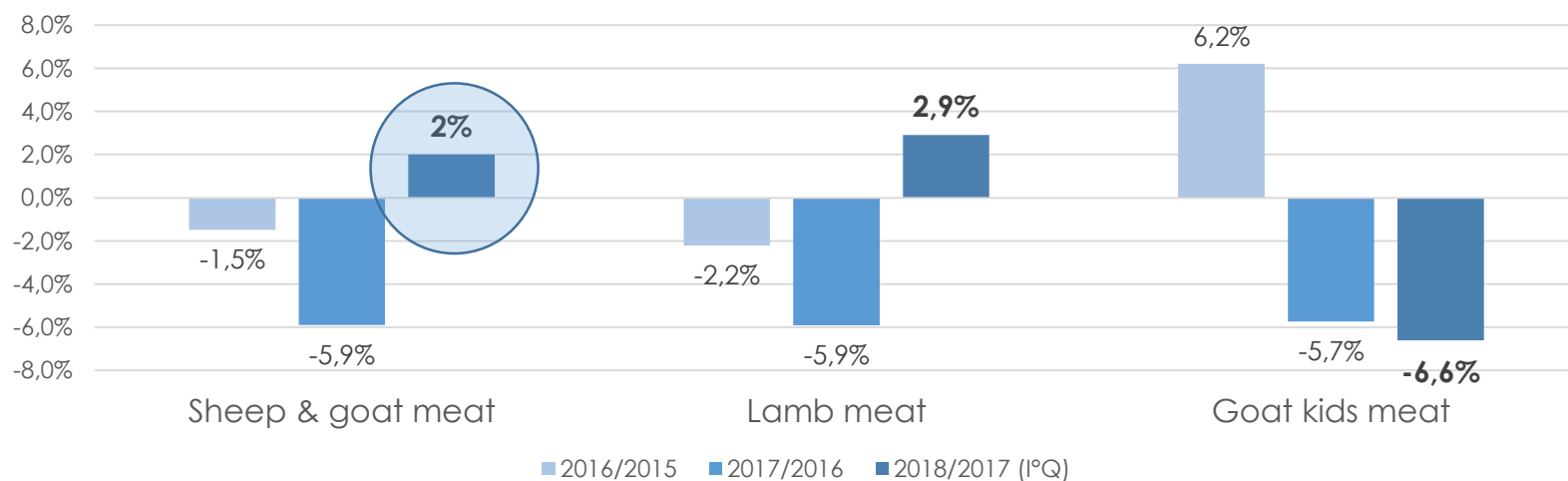
Meat consumption (share 2017)



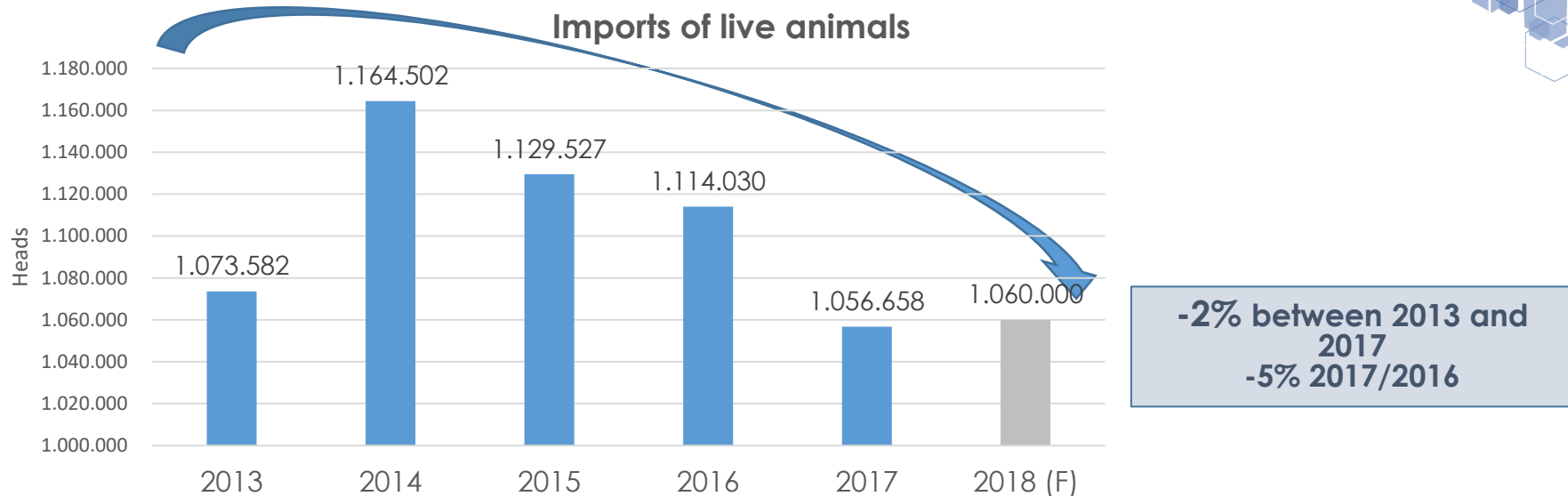
Domestic consumption 2017/2016



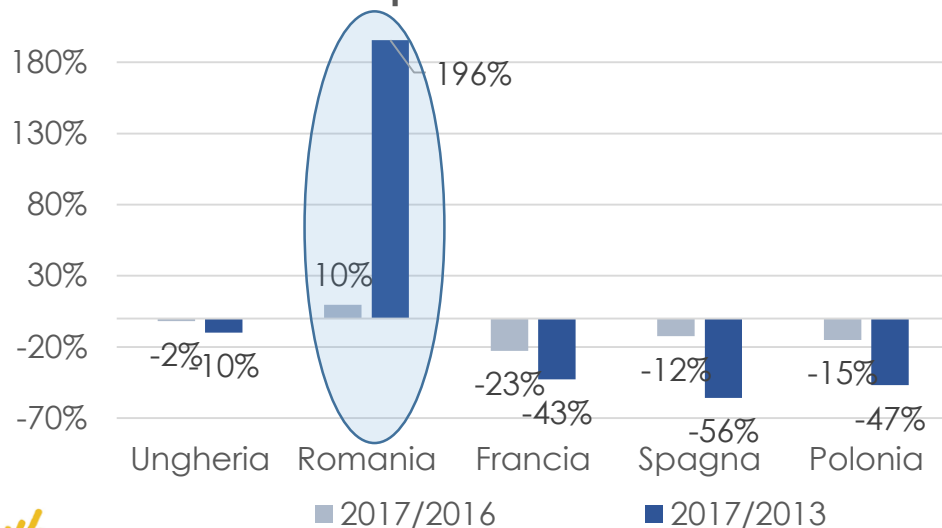
Household consumption 2018



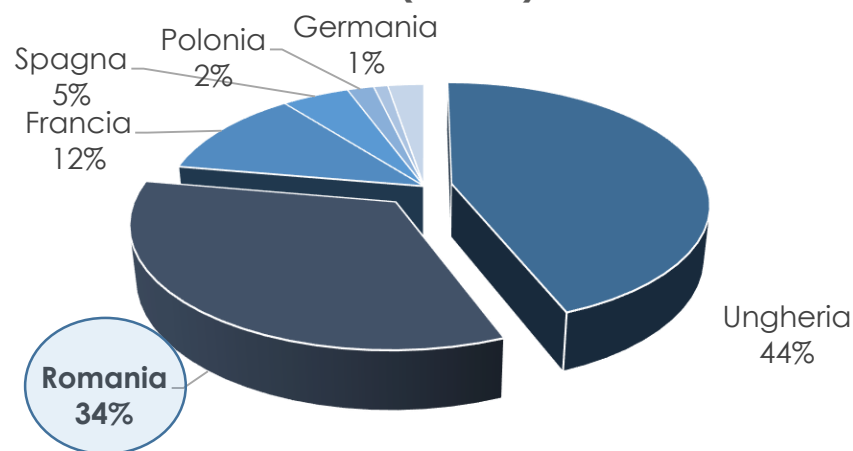
SHEEP AND GOAT IMPORTS LIVE ANIMALS



Trend of imports of live animals



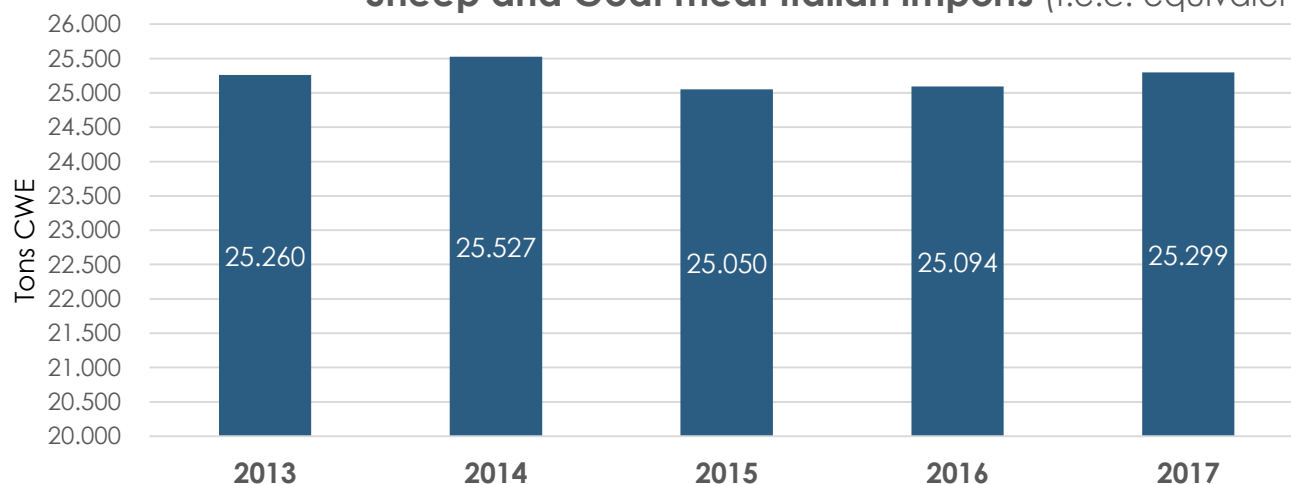
Main live animals provider countries - 2017 (Heads)



MEAT IMPORT (2013-2017)

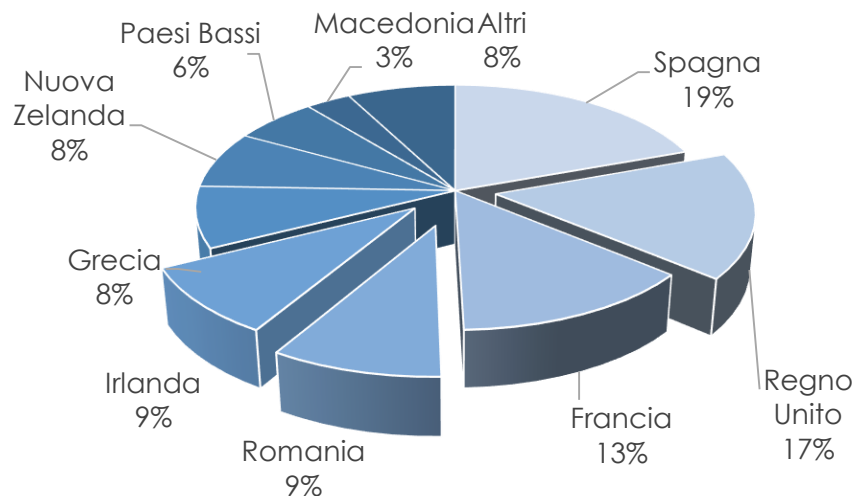


Sheep and Goat meat Italian imports (t.e.c. equivalent)

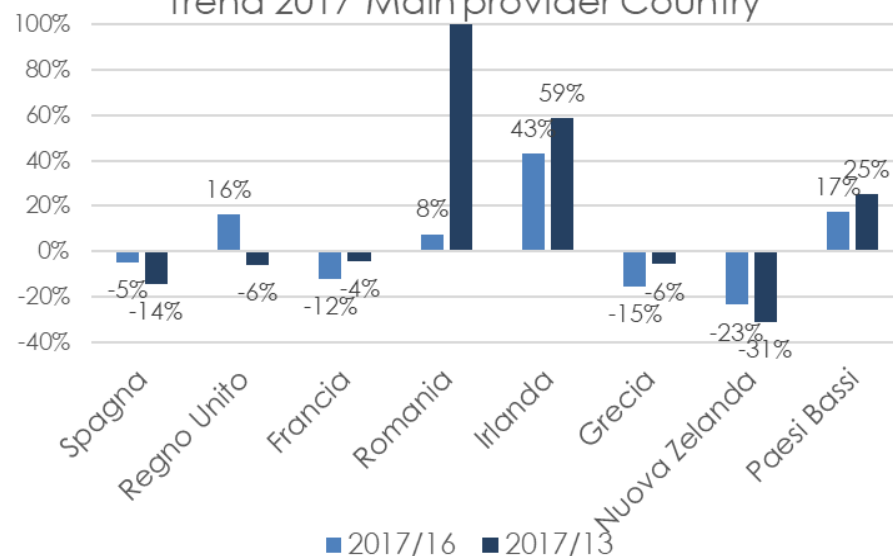


+0,8%
2017/2016
+0,2%
2017/2013

Main meat provider countries 2017



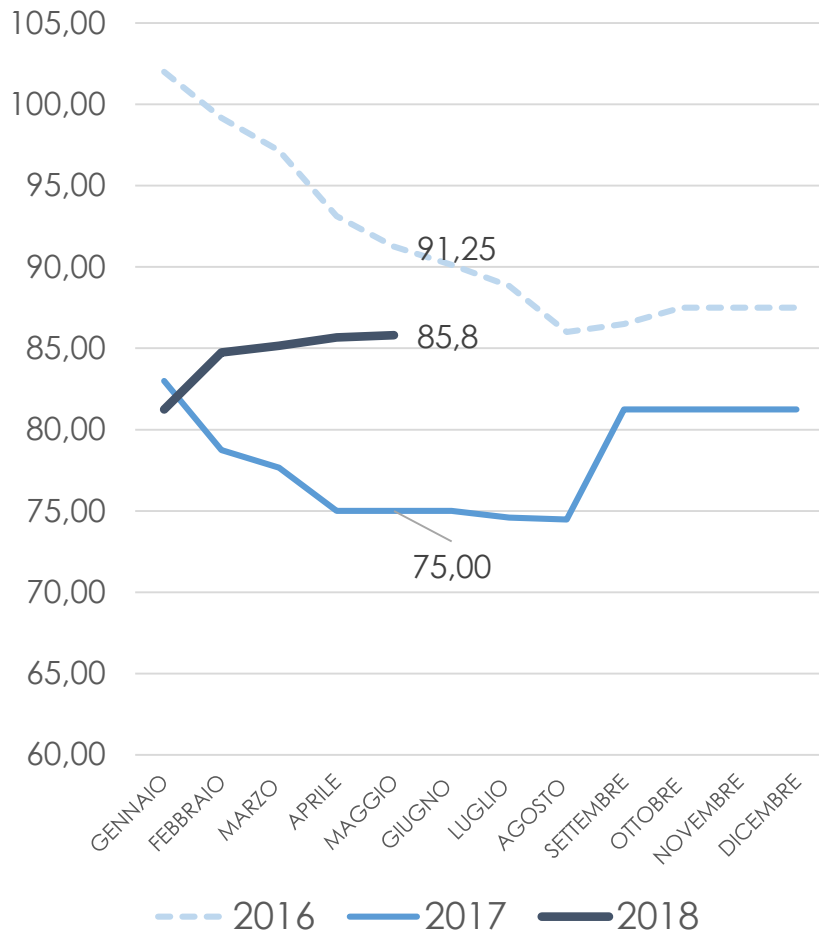
Trend 2017 Main provider Country



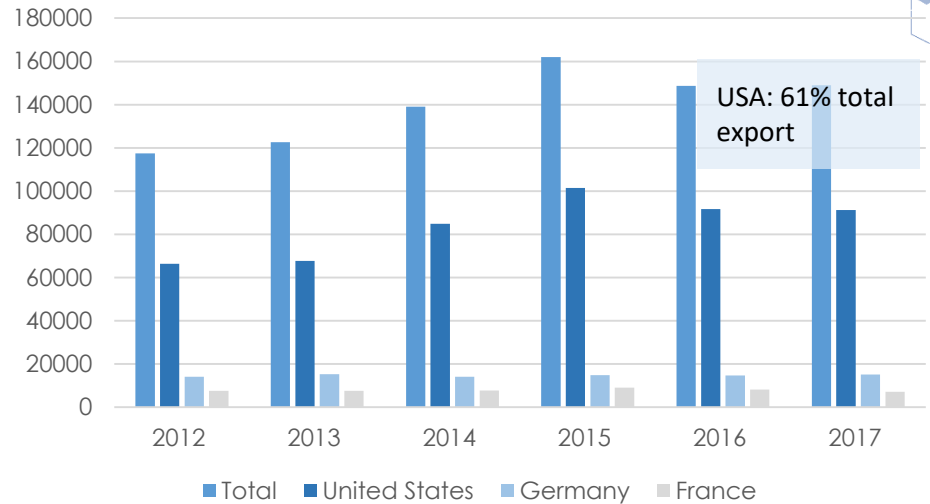
SHEEP'S MILK MARKET



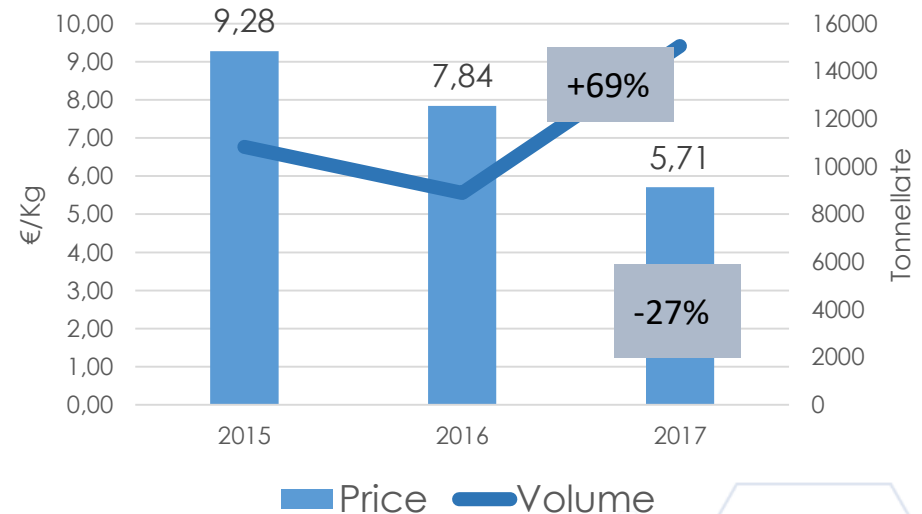
Sheep milk price



Sheep milk cheese exports (value 000 €)



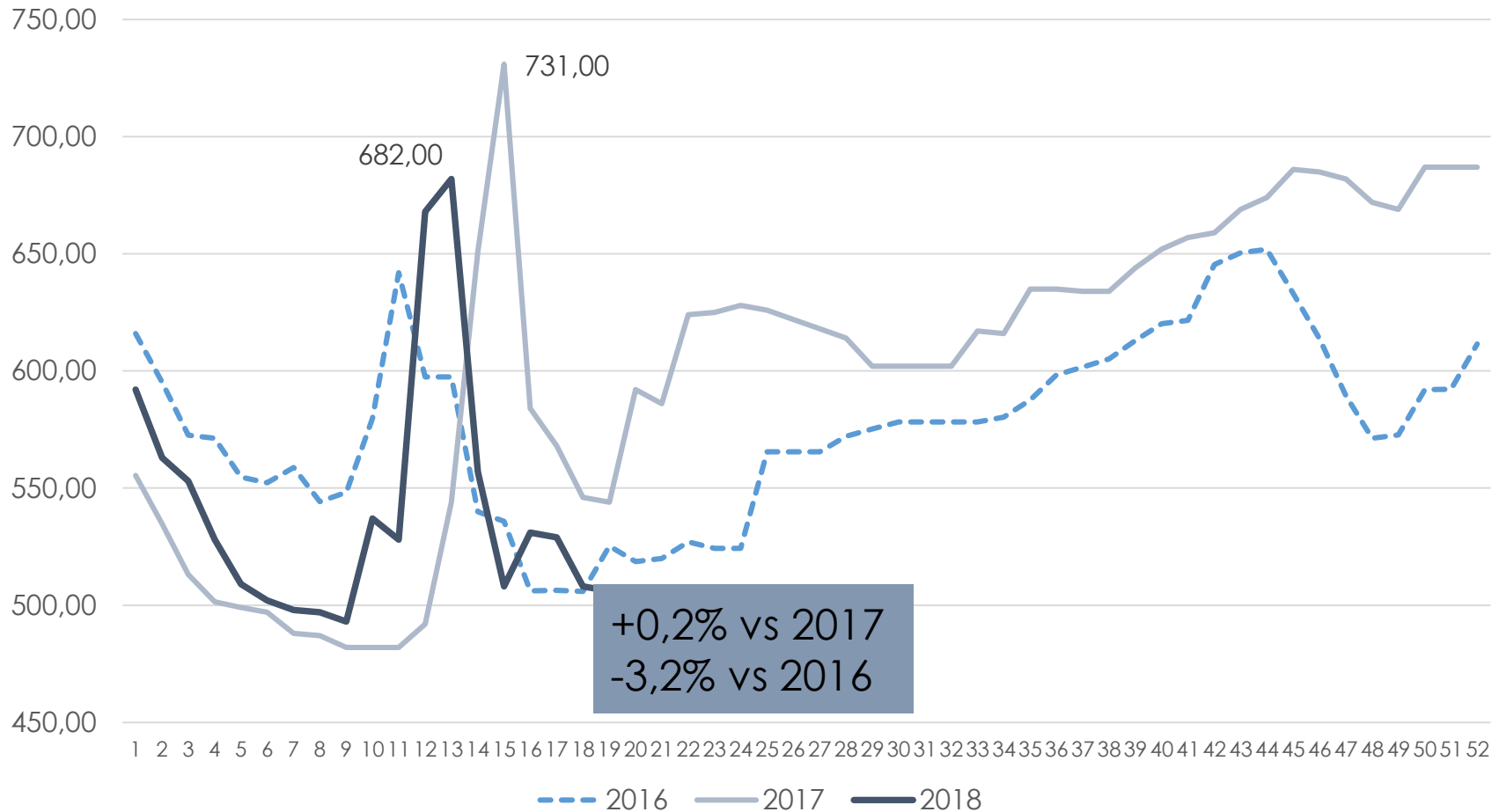
USA Imports of sheep milk cheese



ITALY: PRICES



Light lamb prices (€/100Kg cwe)

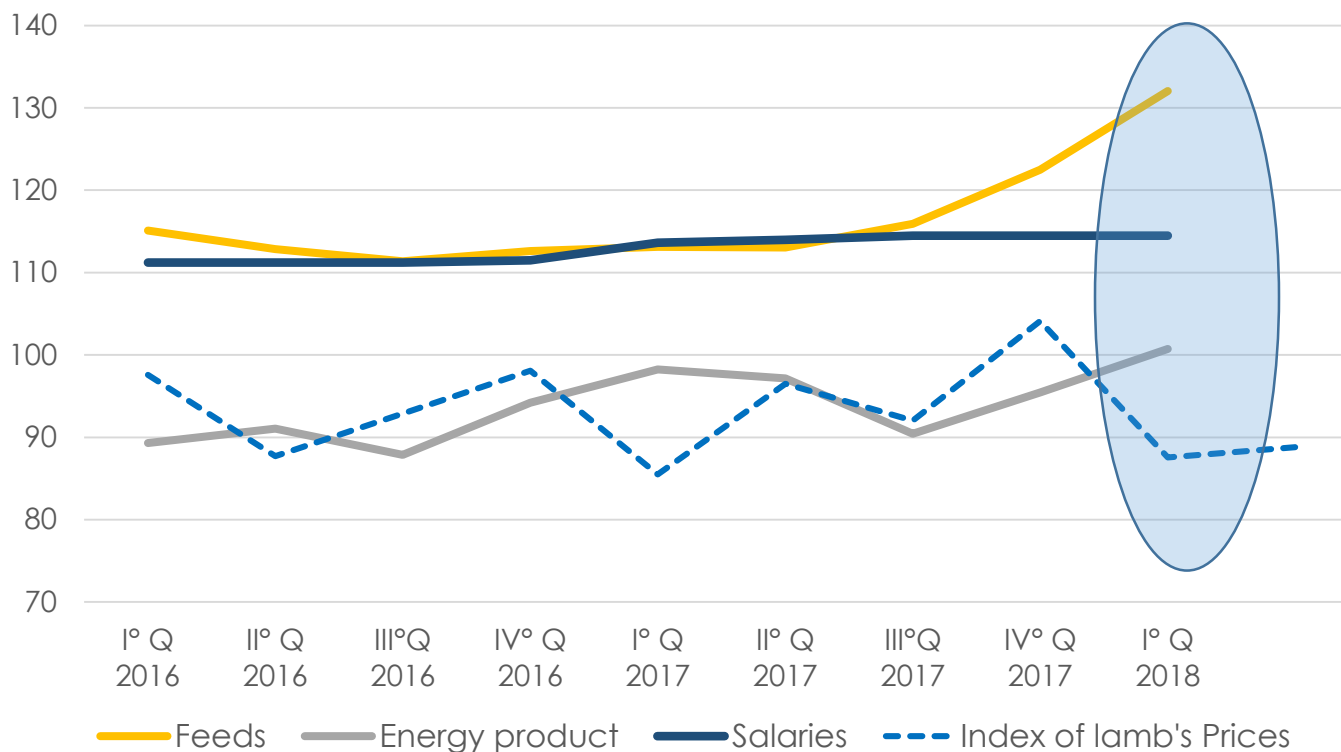


Medium price in weeks 1-21
2017: 538 €/100Kg
2018: 539 €/100Kg

PRODUCTION COSTS



ISMEA INDEX FOR PRODUCTION MEANS PRICES



Variation 2018/2017 (I° Q): Production means prices index for sheep and goat sector: +7,5%

Feed: +8,2%

Energy products: +2,5%

Salaries: +0,8%

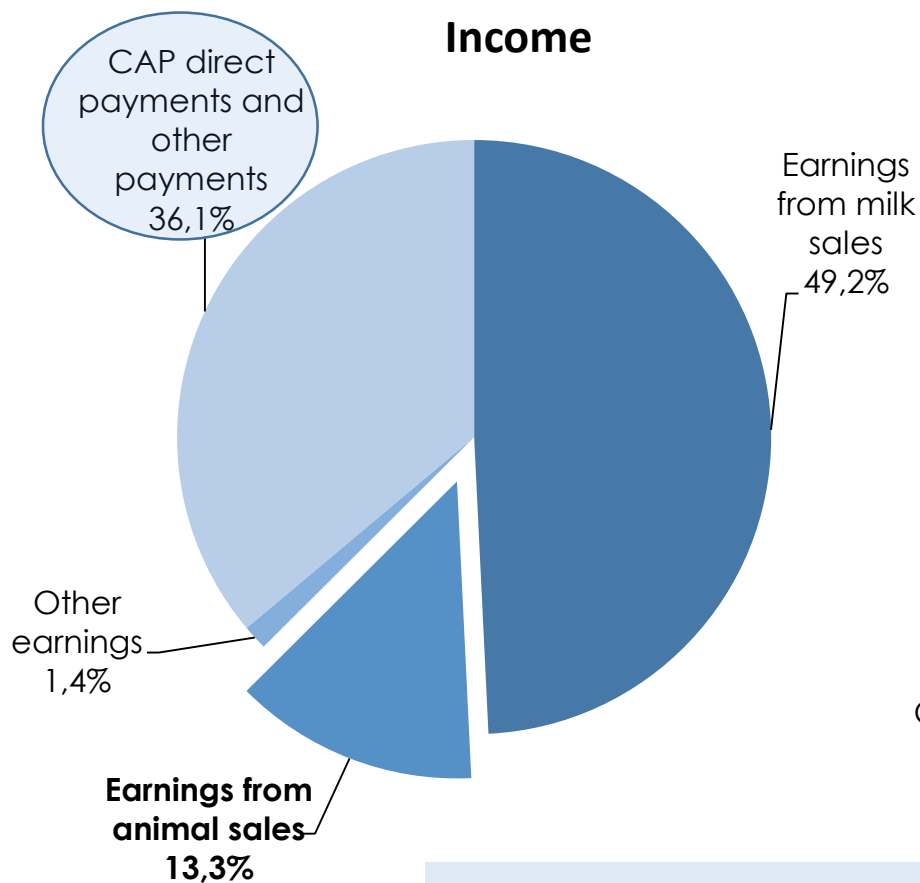
Index of Lamb price 2018/2017 (I°Q): +2,5%

FARMERS BALANCESHEET

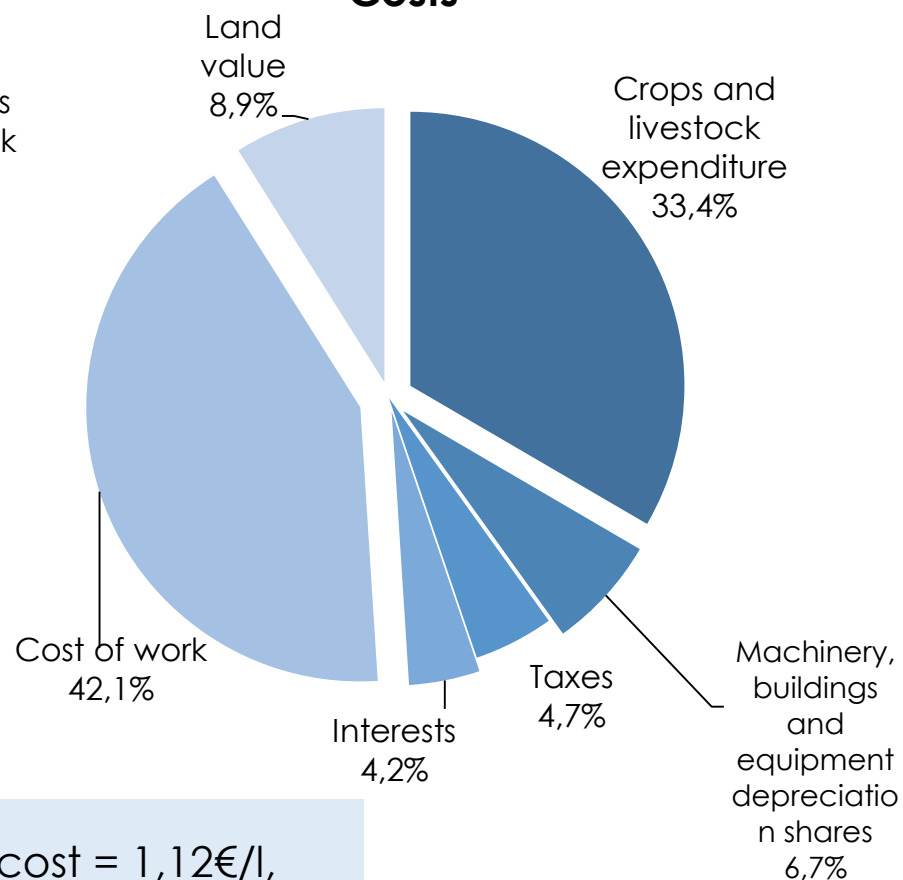


SURVEY IN MEDIUM-SIZED FARMS RESULTS (50/385 HEADS)

Income



Costs



2017: Milk production cost = 1,12€/l,
Milk medium price = 0,80/0,90 €/l



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