



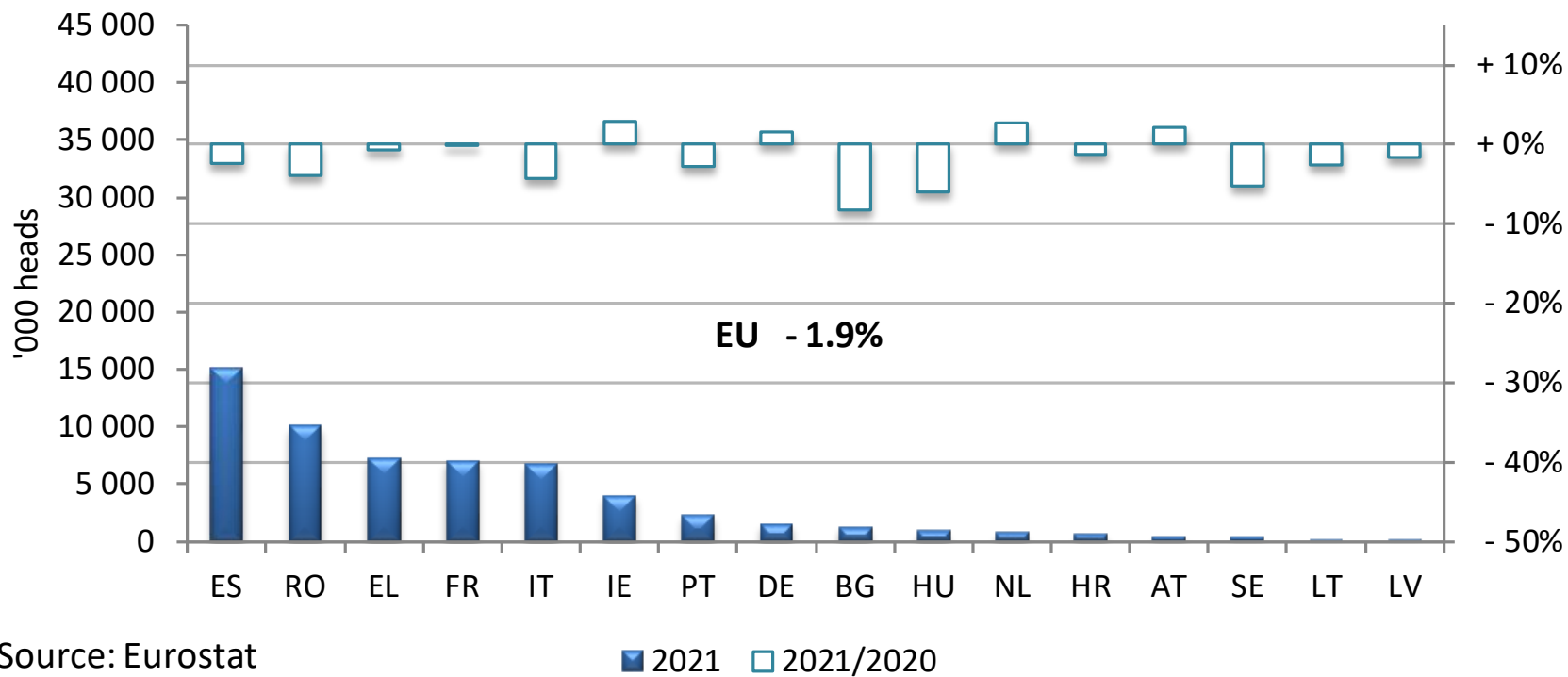
Sheep / Goat Civil Dialogue Group
Market Situation for Sheep & Goat Meats
December 2022



Production

PRODUCTION

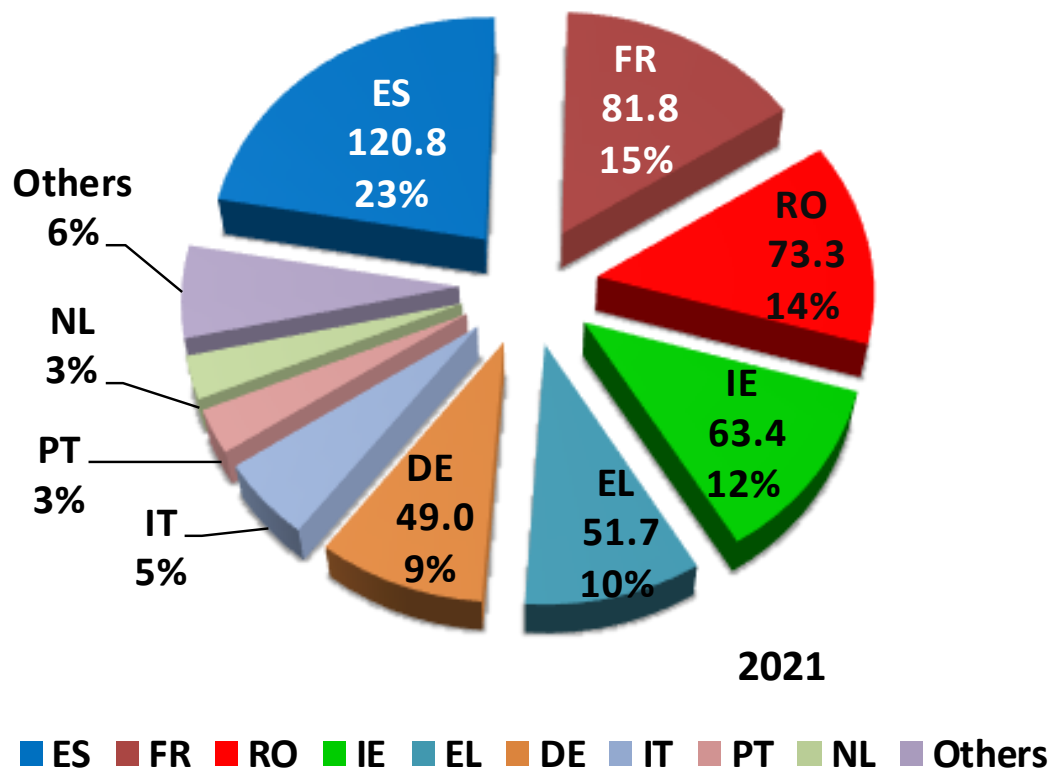
Annual evolution of sheep flocks reported by MS



Source: Eurostat

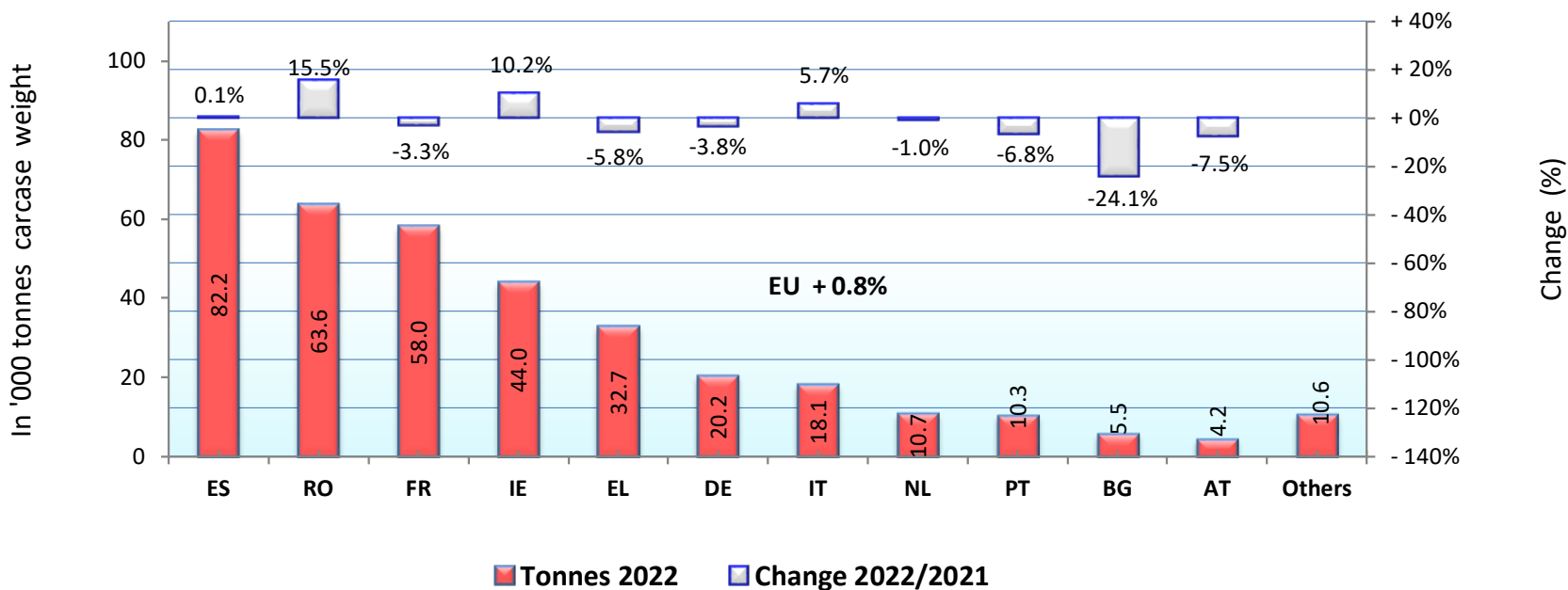
PRODUCTION

EU Sheep Meat Producers
(^{'000 tonnes})



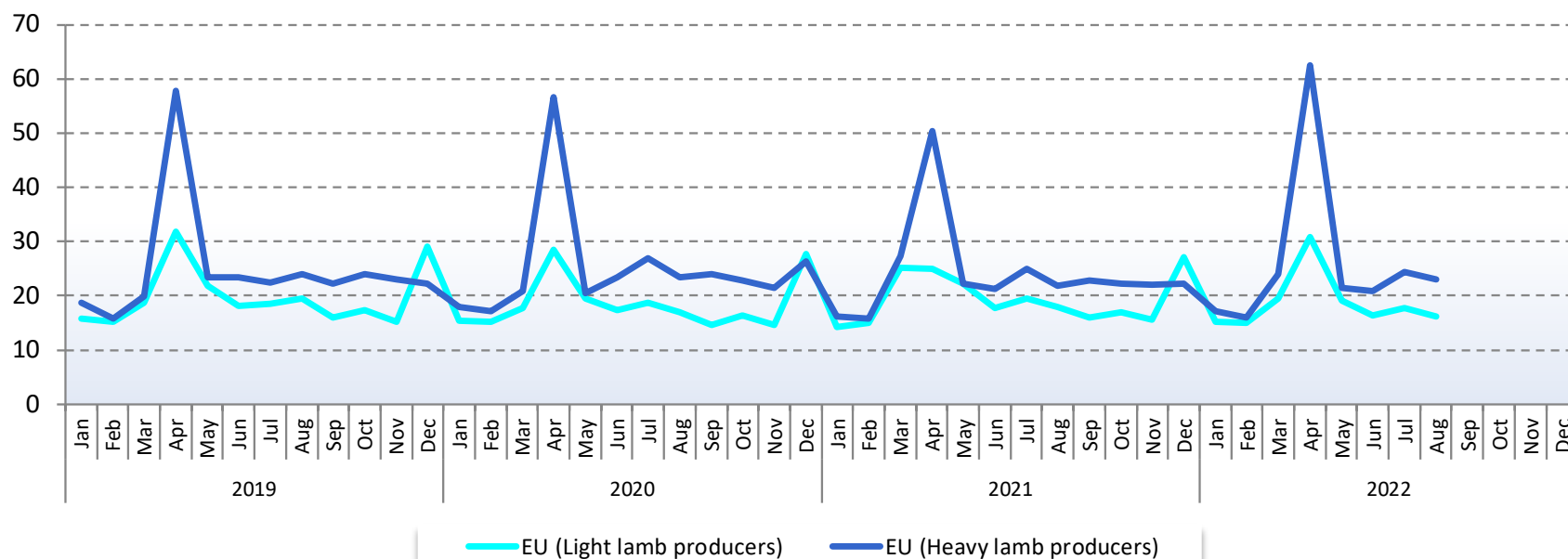
PRODUCTION

Sheep slaughtering for EU 2022/2021 (up to August)



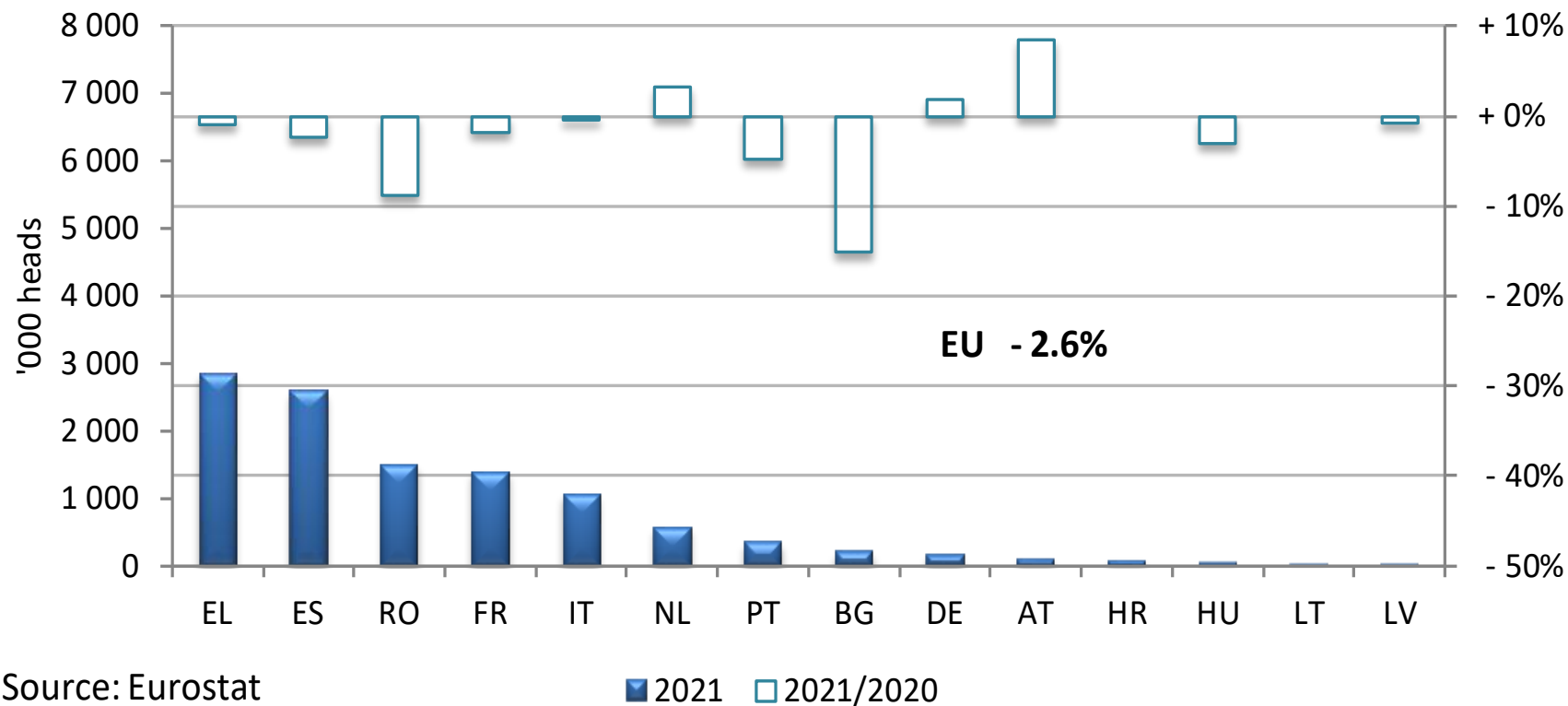
PRODUCTION

Monthly sheep slaughtering (in '000 tonnes)



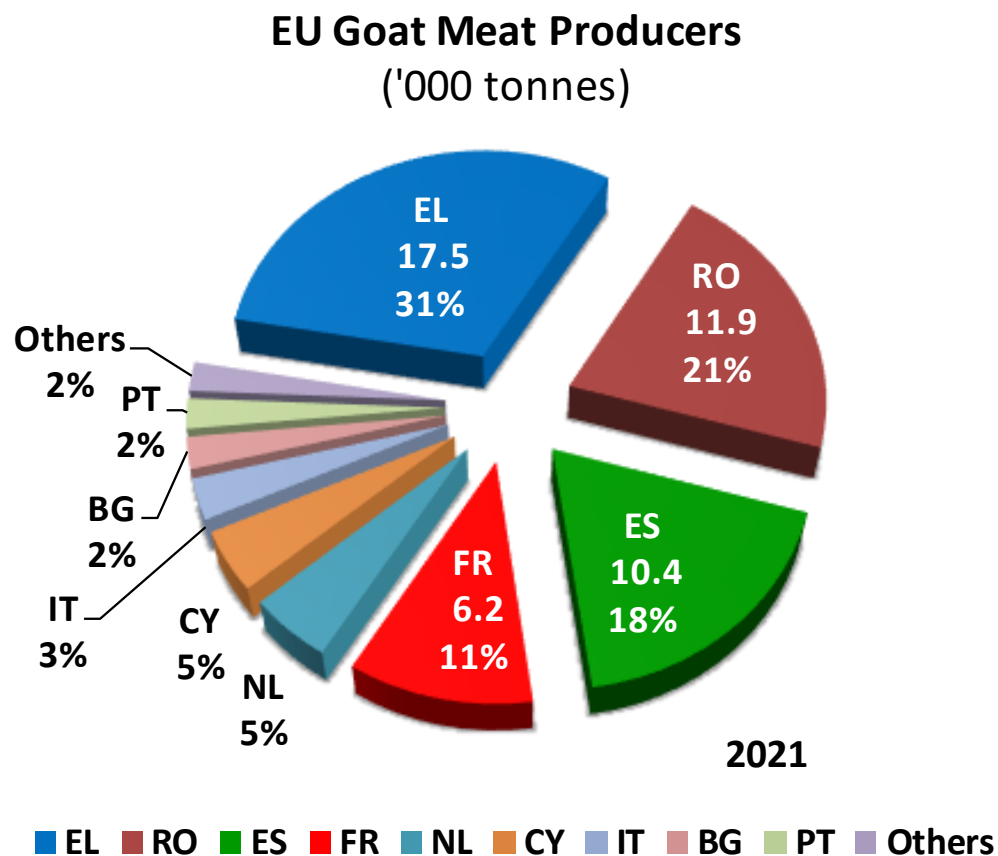
PRODUCTION

Annual evolution of goat flocks reported by MS



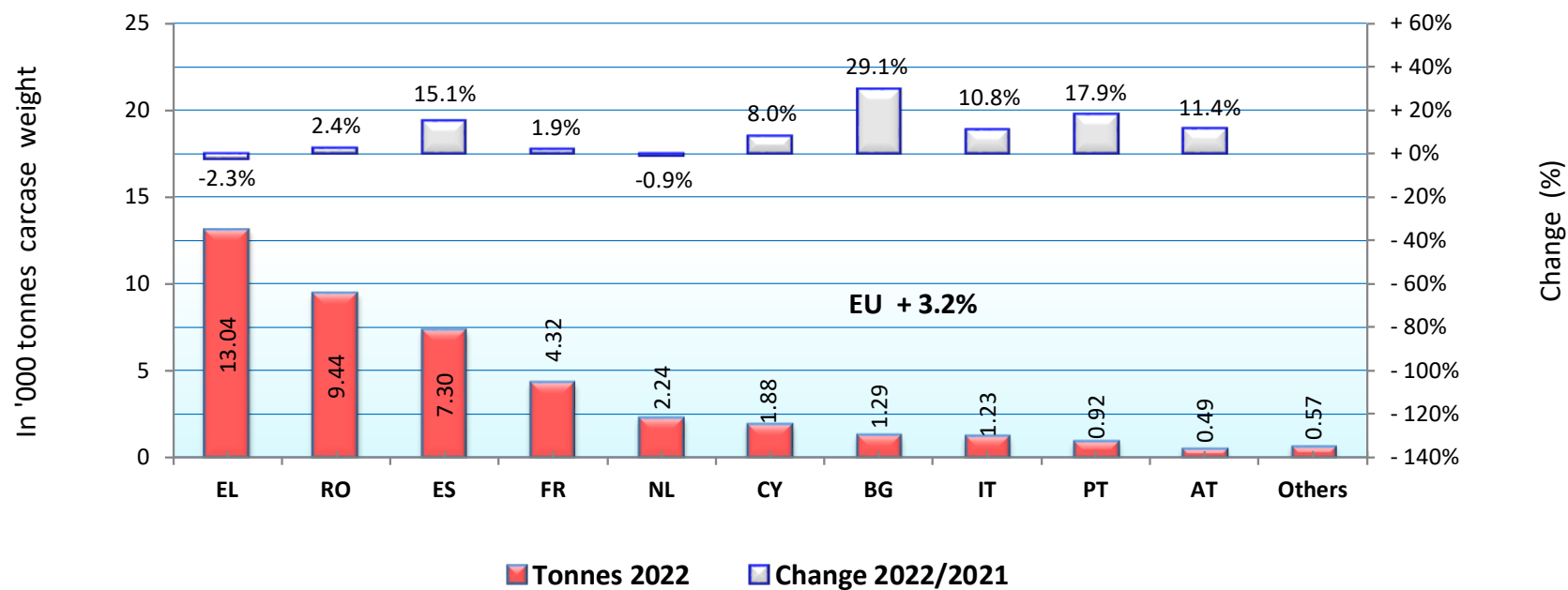
Source: Eurostat

PRODUCTION



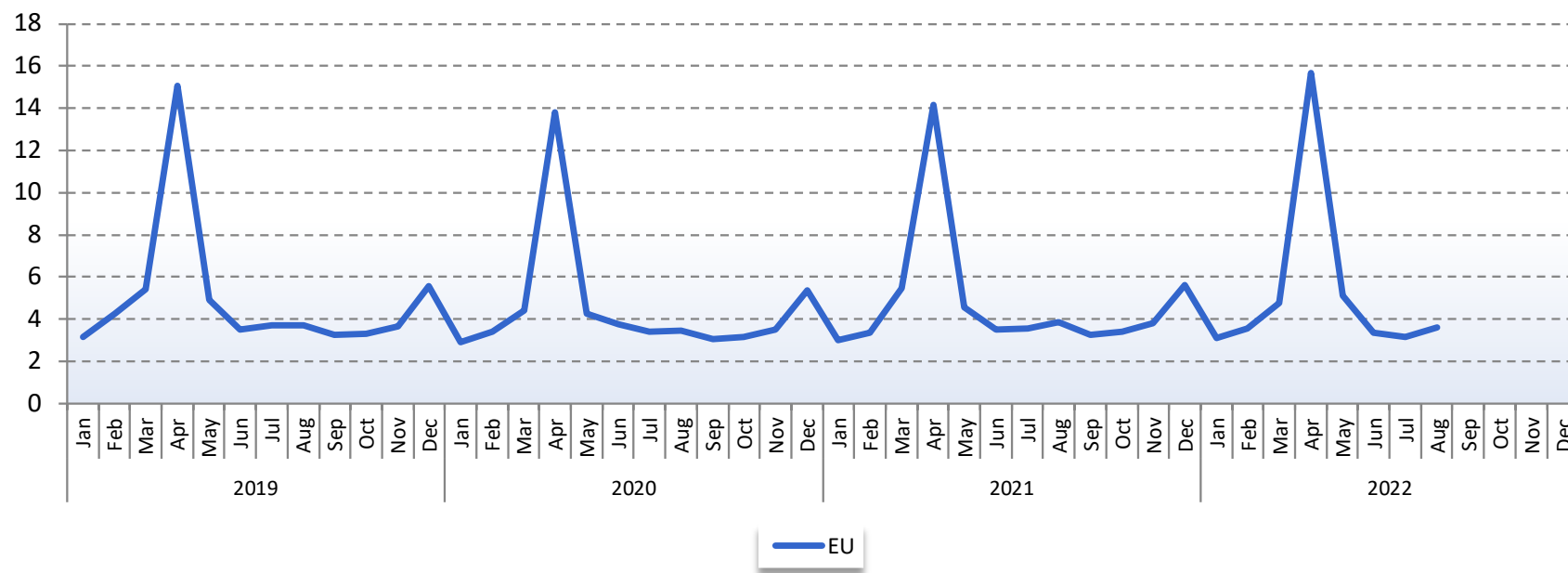
PRODUCTION

**Goat slaughtering for EU
2022/2021 (up to August)**



PRODUCTION

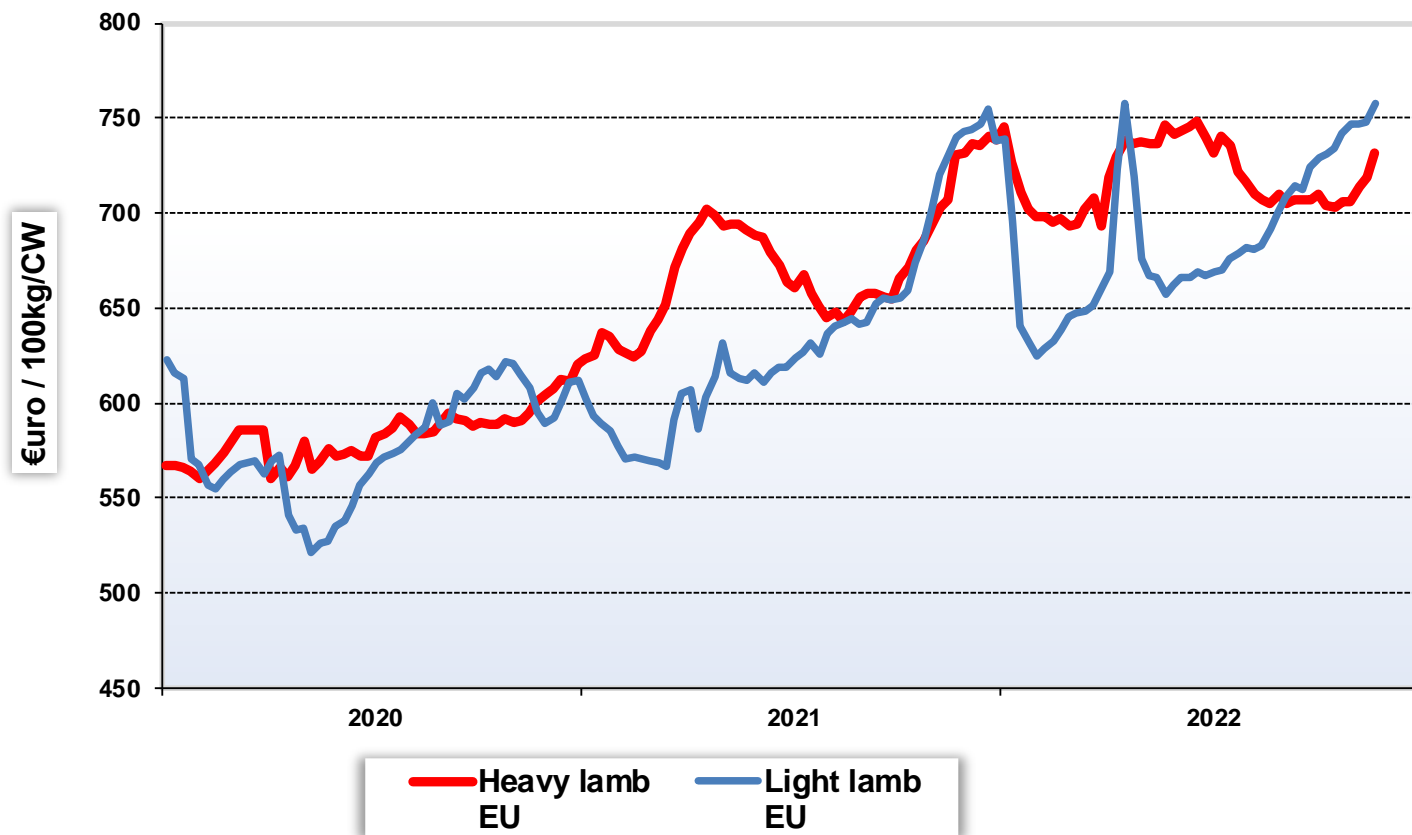
Monthly goat slaughtering in the EU (in '000 tonnes)





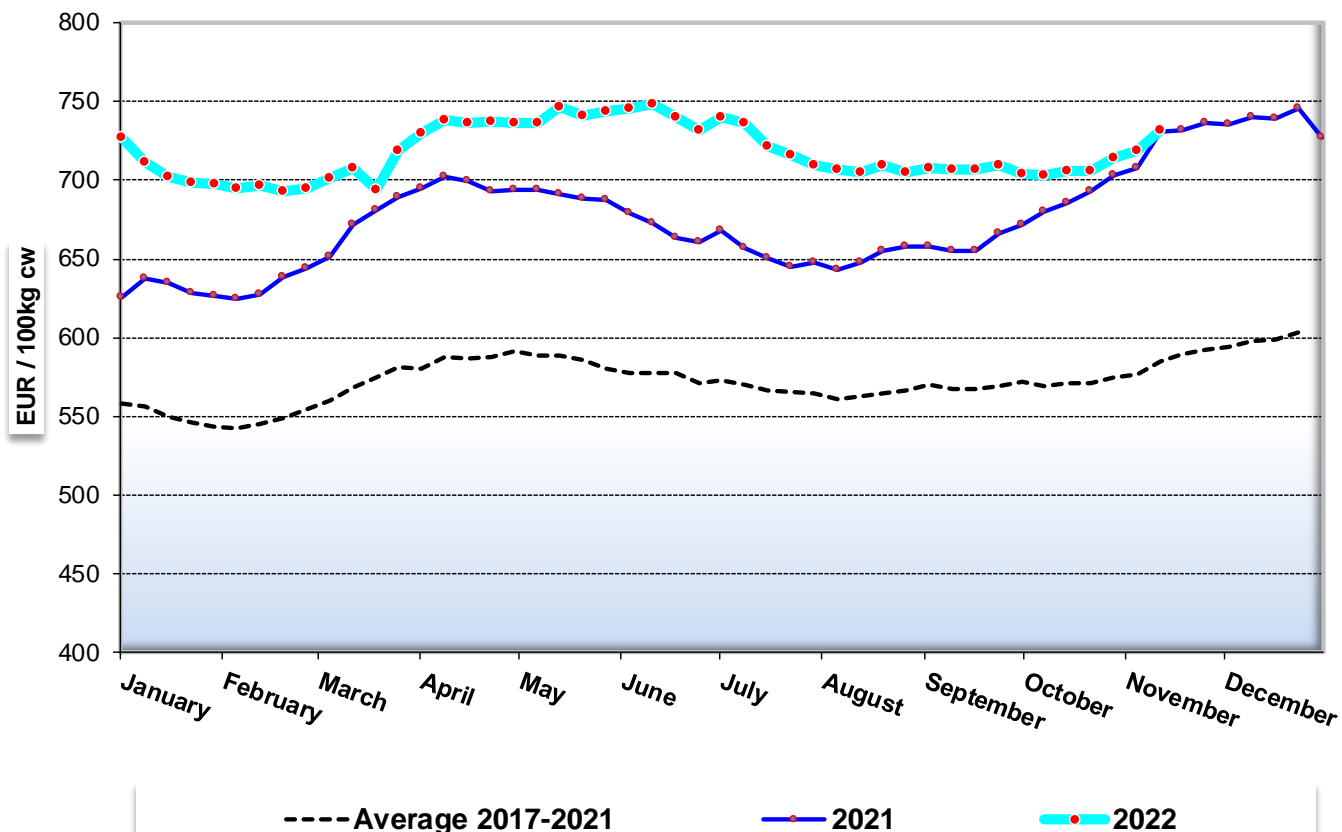
Prices

Evolution of EU lamb prices

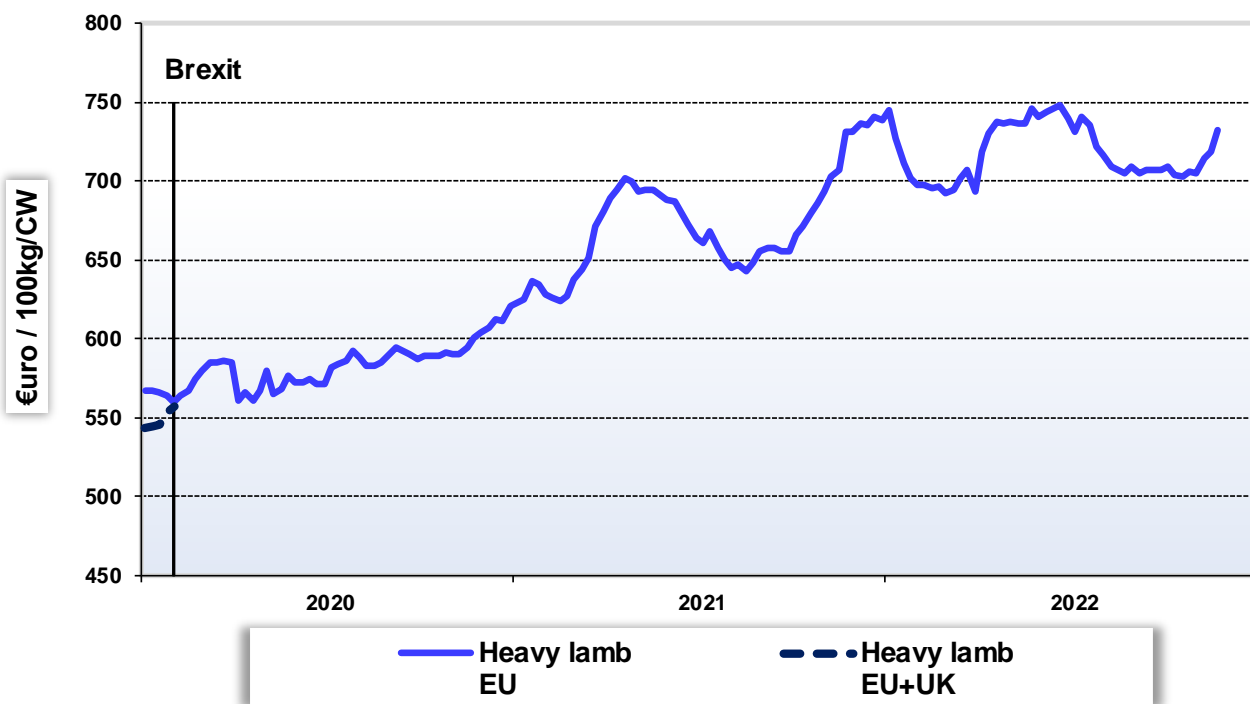


Evolution of **heavy** lamb prices in the EU

Latest price ==> 731.92 EUR/100 kg

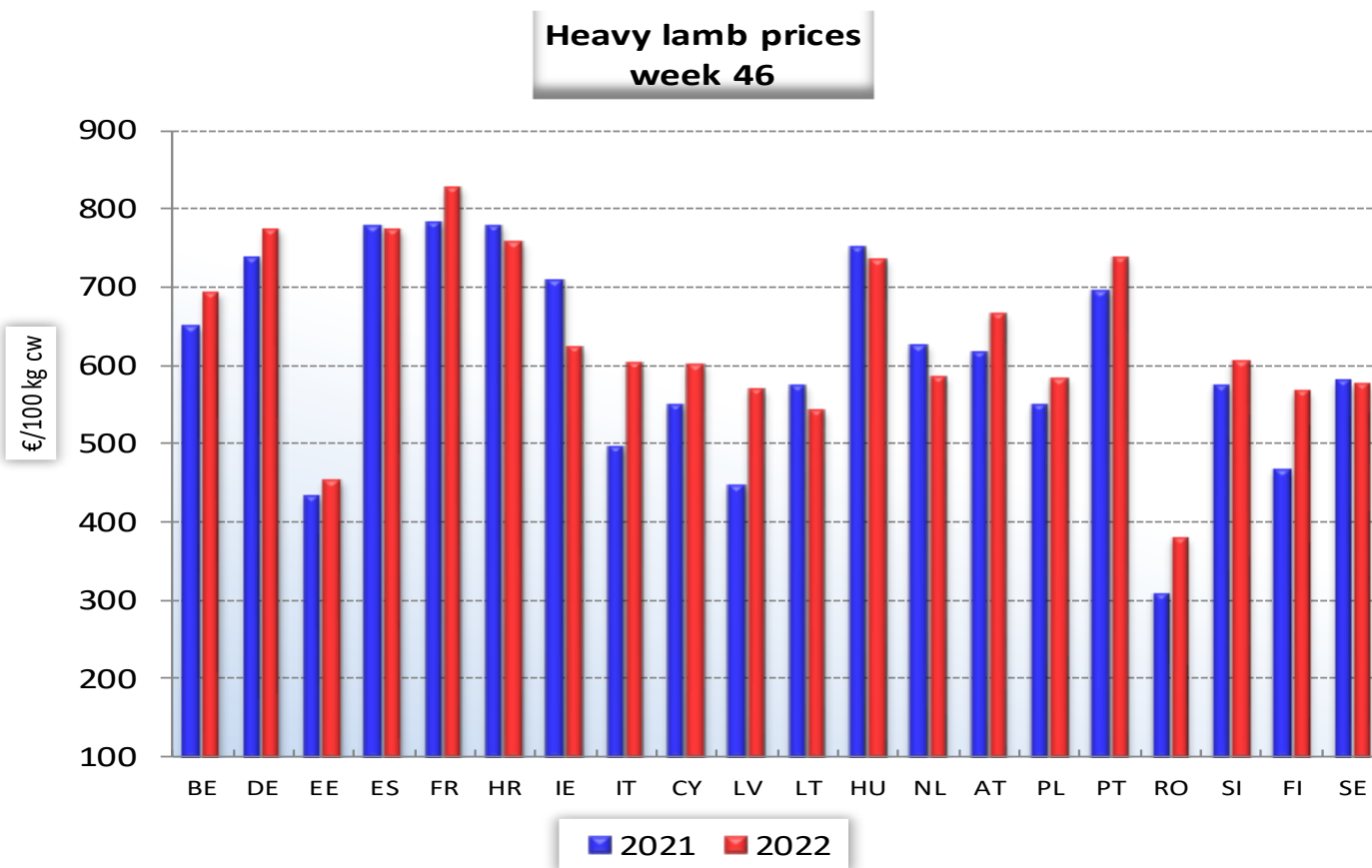


Evolution of EU average heavy lamb prices



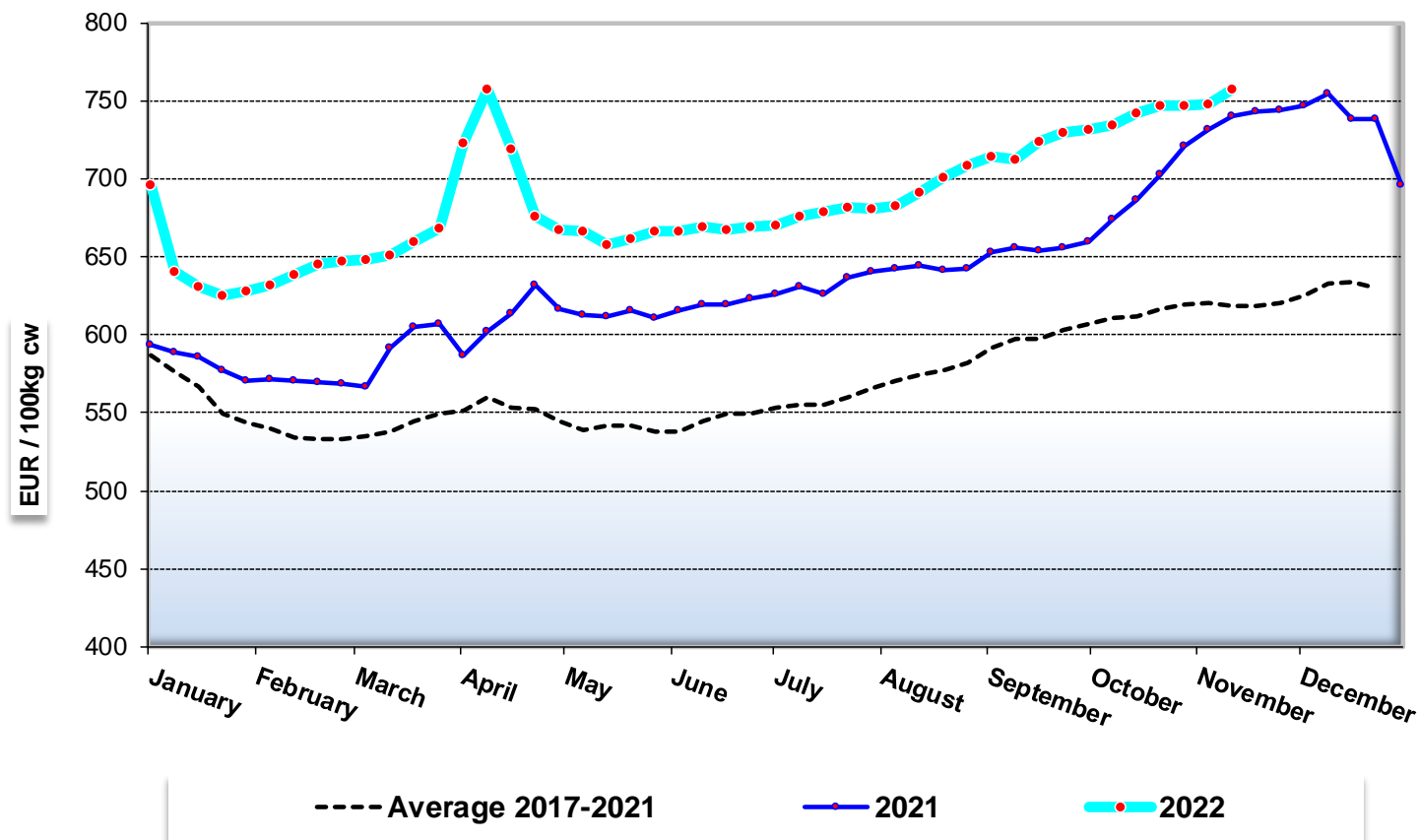
Heavy lambs prices of October 2022 compared to

	BE	DE	IE	ES	FR	HR	IT	CY	LV	LT	HU	NL	AT	PL	PT	RO	SI	FI	SE	EU
September 2022	+ 1.3%	- 0.3%	- 0.3%	+ 1.0%	- 0.2%	+ 5.9%	+ 0.3%	+ 4.2%	- 3.9%	+ 0.9%	- 3.8%	- 5.2%	+ 1.1%	- 1.5%	+ 7.4%	- 13.4%	- 0.7%	+ 2.5%	- 10.9%	- 0.3%
October 2021	+ 15.2%	+ 2.7%	- 1.6%	+ 4.4%	+ 5.8%	+ 6.5%	+ 22.1%	- 9.3%	+ 21.1%	+ 2.1%	- 2.0%	- 5.2%	+ 8.6%	+ 2.2%	+ 9.8%	+ 10.5%	+ 0.2%	+ 14.0%	+ 1.5%	+ 3.6%

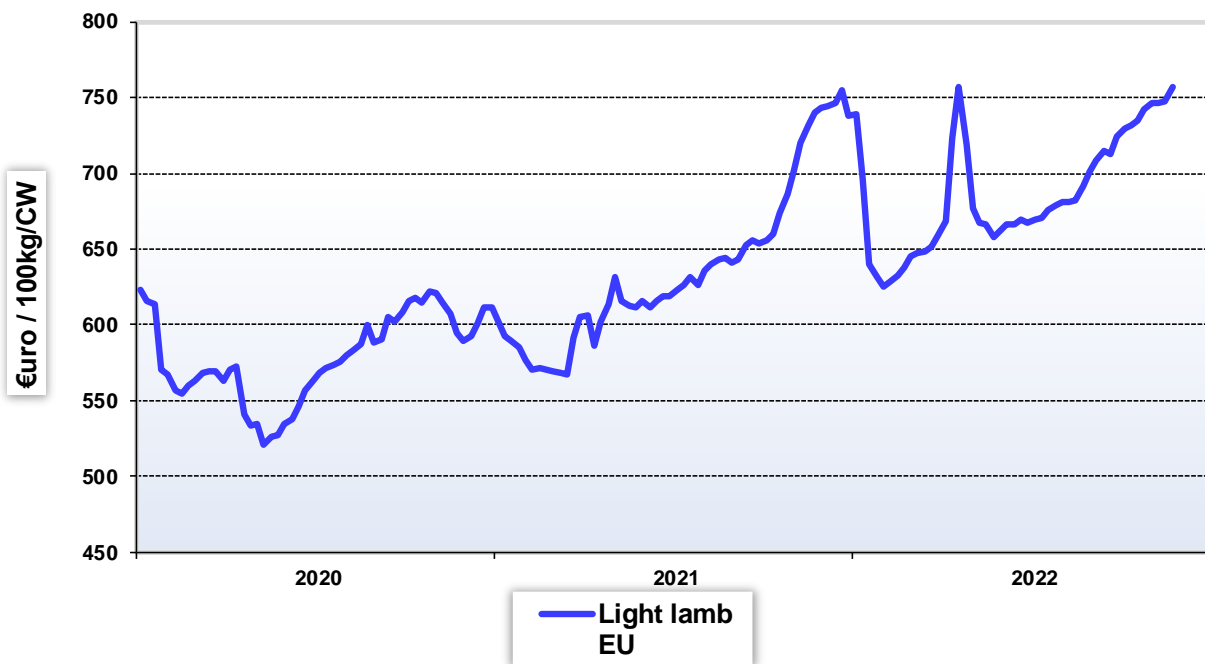


Evolution of **light** lamb prices in the EU

Latest price ==> 757.35 EUR/100 kg



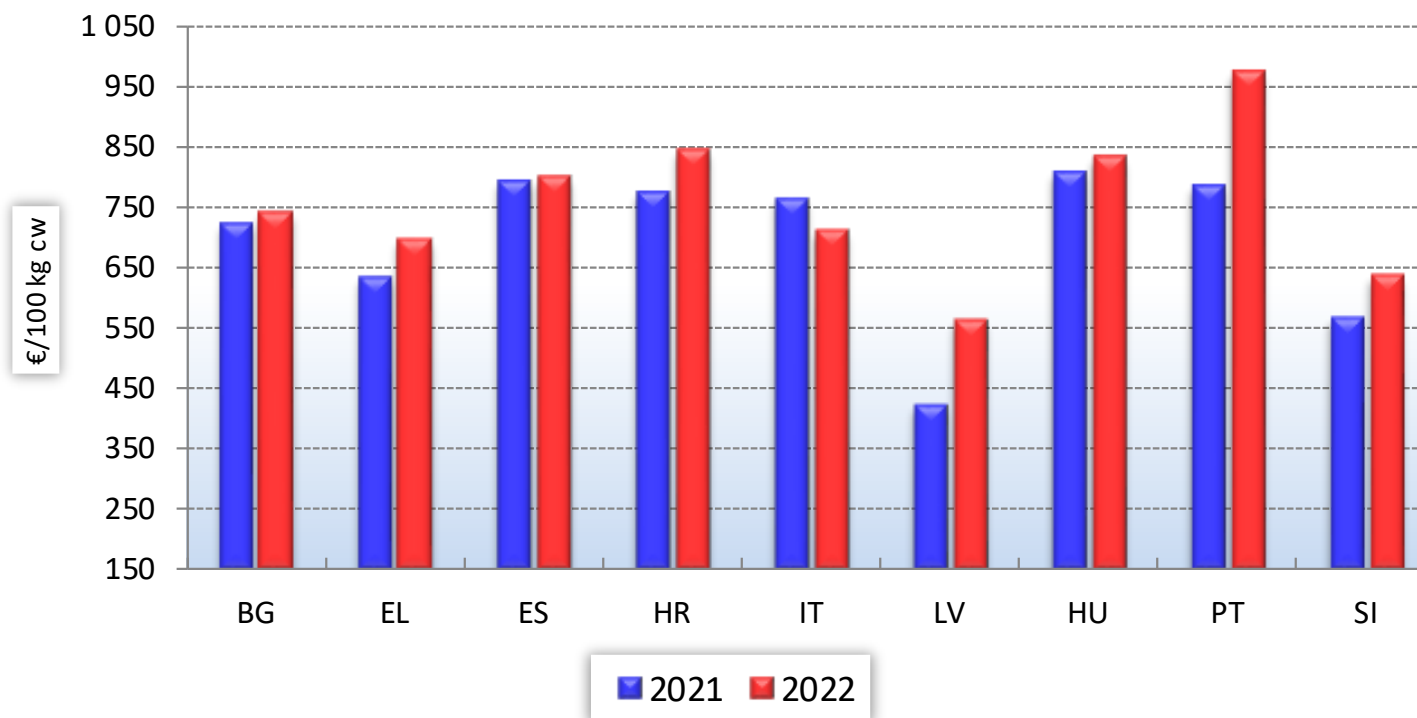
Evolution of EU average light lamb prices

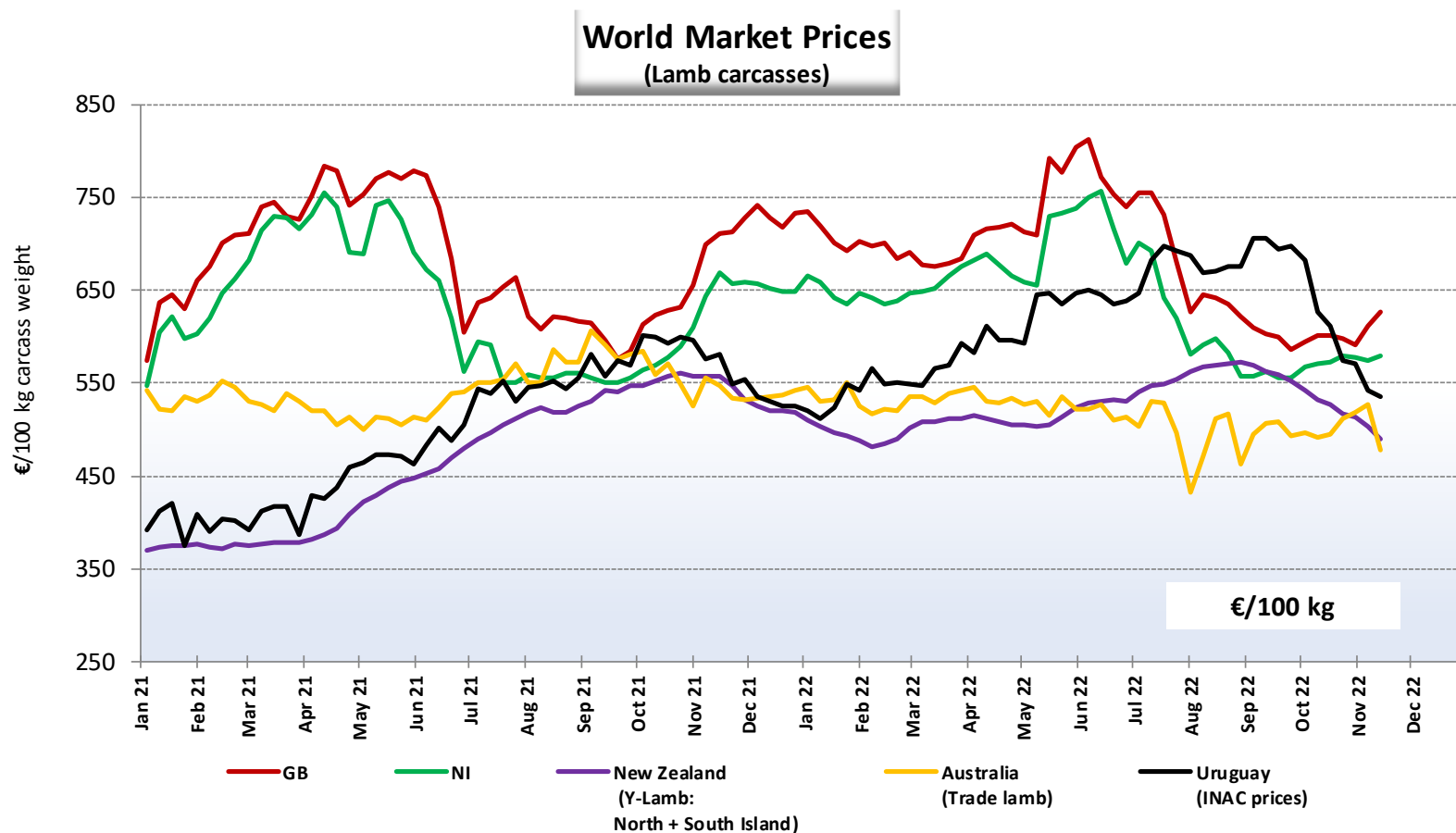


Light lambs prices of October 2022 compared to

	BG	EL	ES	HR	IT	LV	HU	PT	SI	EU
September 2022	- 1.3%	+ 0.8%	+ 1.0%	+ 0.4%	+ 11.8%	- 2.8%	- 1.7%	+ 6.7%	+ 3.3%	+ 2.9%
October 2021	+ 1.4%	+ 15.3%	+ 4.6%	+ 7.9%	+ 10.1%	+ 31.3%	+ 1.1%	+ 16.9%	+ 11.5%	+ 8.9%

Light lamb prices
week 46







Trade

EU imports of sheep & goatmeat and live animals

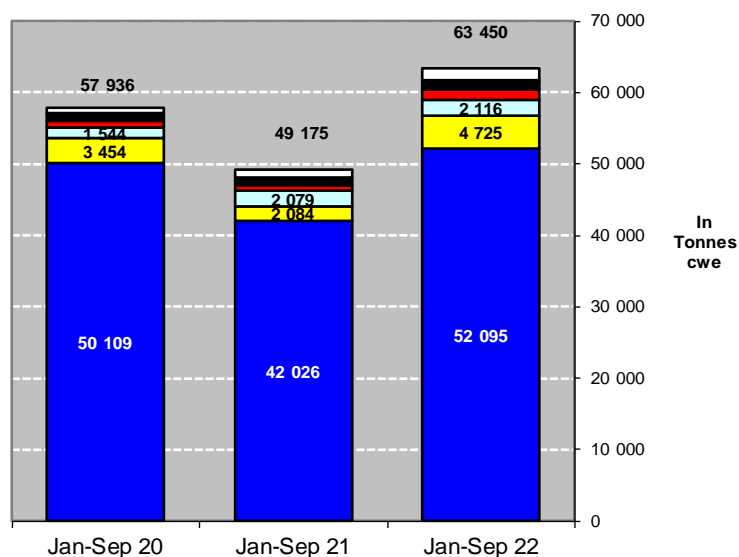
Trade figures (COMEXT)

IMPORT

	2018		2019		2020		2021		Jan-Sep 22		Compared to Jan-Sep 21
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
New Zealand	84 222	84.8%	68 984	85.0%	62 976	84.1%	52 183	83.0%	52 095	82.1%	+ 24.0%
Australia	7 535	7.6%	5 987	7.4%	6 379	8.5%	3 855	6.1%	4 725	7.4%	+++
North Macedonia	1 770	1.8%	1 683	2.1%	1 683	2.2%	2 206	3.5%	2 116	3.3%	+ 1.8%
Chile	1 982	2.0%	1 299	1.6%	1 244	1.7%	1 014	1.6%	1 451	2.3%	+ 92.8%
Argentina	1 297	1.3%	1 448	1.8%	1 465	2.0%	1 224	1.9%	1 286	2.0%	+ 13.6%
Uruguay	656	0.7%	444	0.5%	354	0.5%	48	0.1%	702	1.1%	+++
Other Origins	1 889	1.9%	1 266	1.6%	770	1.0%	2 342	3.7%	1 076	1.7%	+ 61.5%
Total from Third Countries	99 351		81 111		74 870		62 872		63 450		
% change			- 18%		- 8%		- 16%		+ 29.0%		

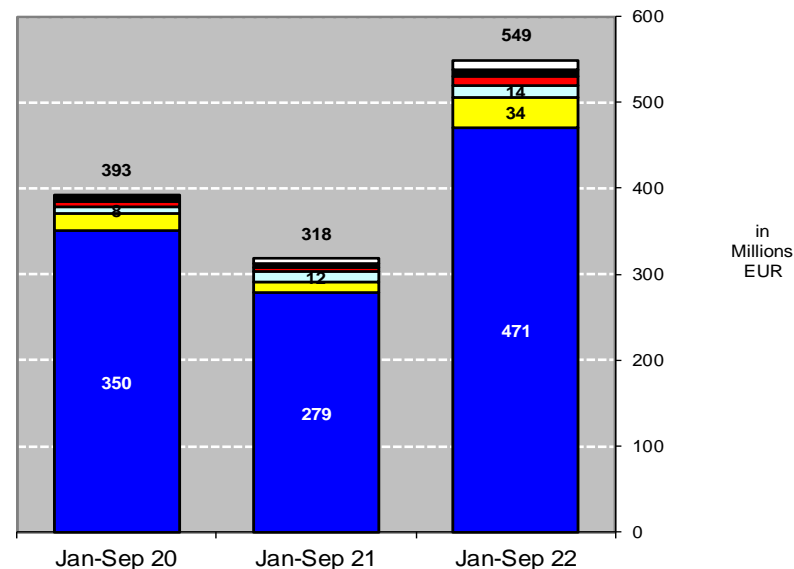
EU imports of sheep & goatmeat and live animals Trade figures (COMEXT)

EU IMPORTS of Sheep & Goat (Tonnes cwe)
without UK



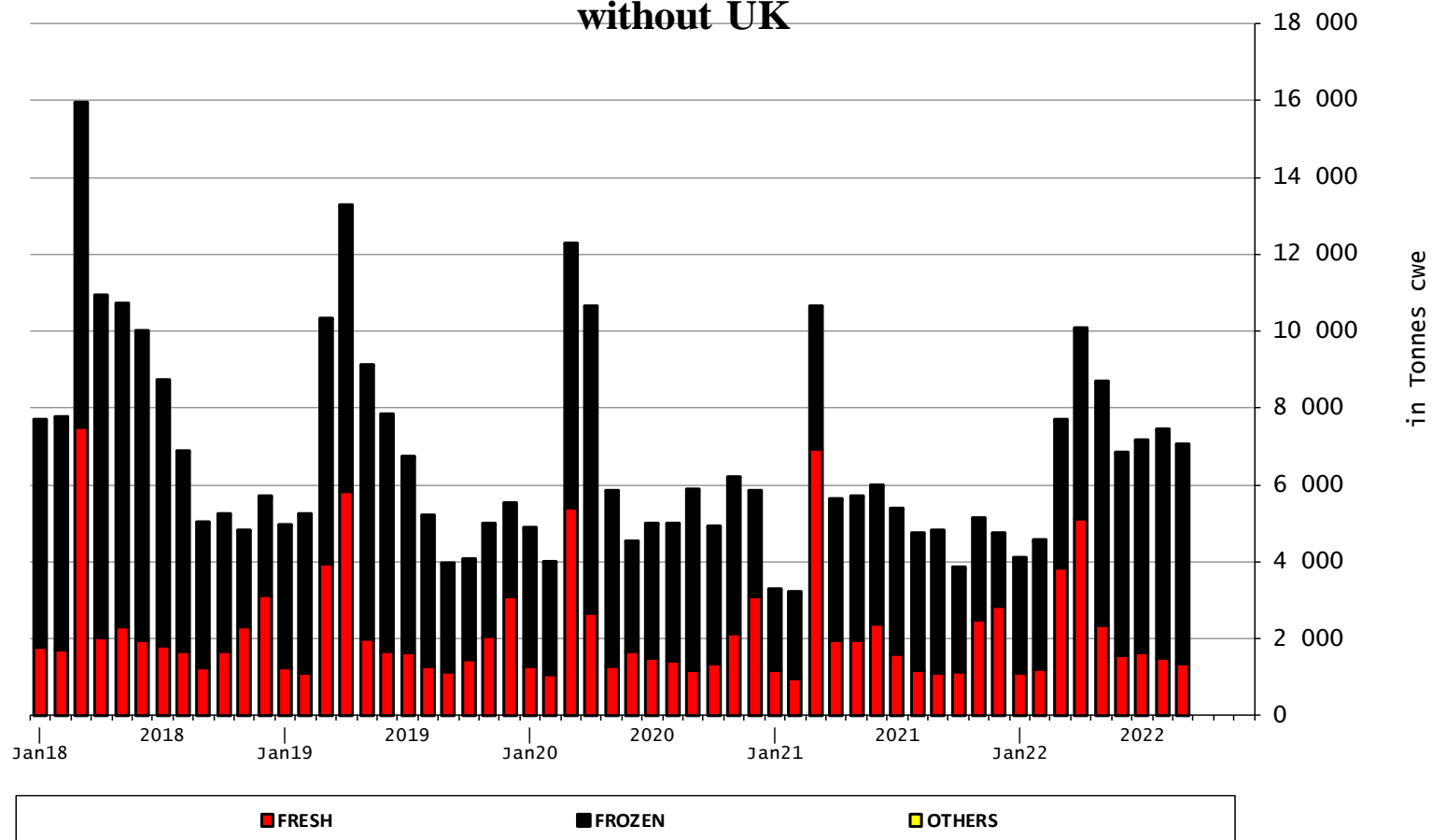
■ New Zealand ■ Australia ■ North Macedonia ■ Chile ■ Argentina ■ Other origins

EU IMPORTS of Sheep & Goat (Millions EUR)
without UK

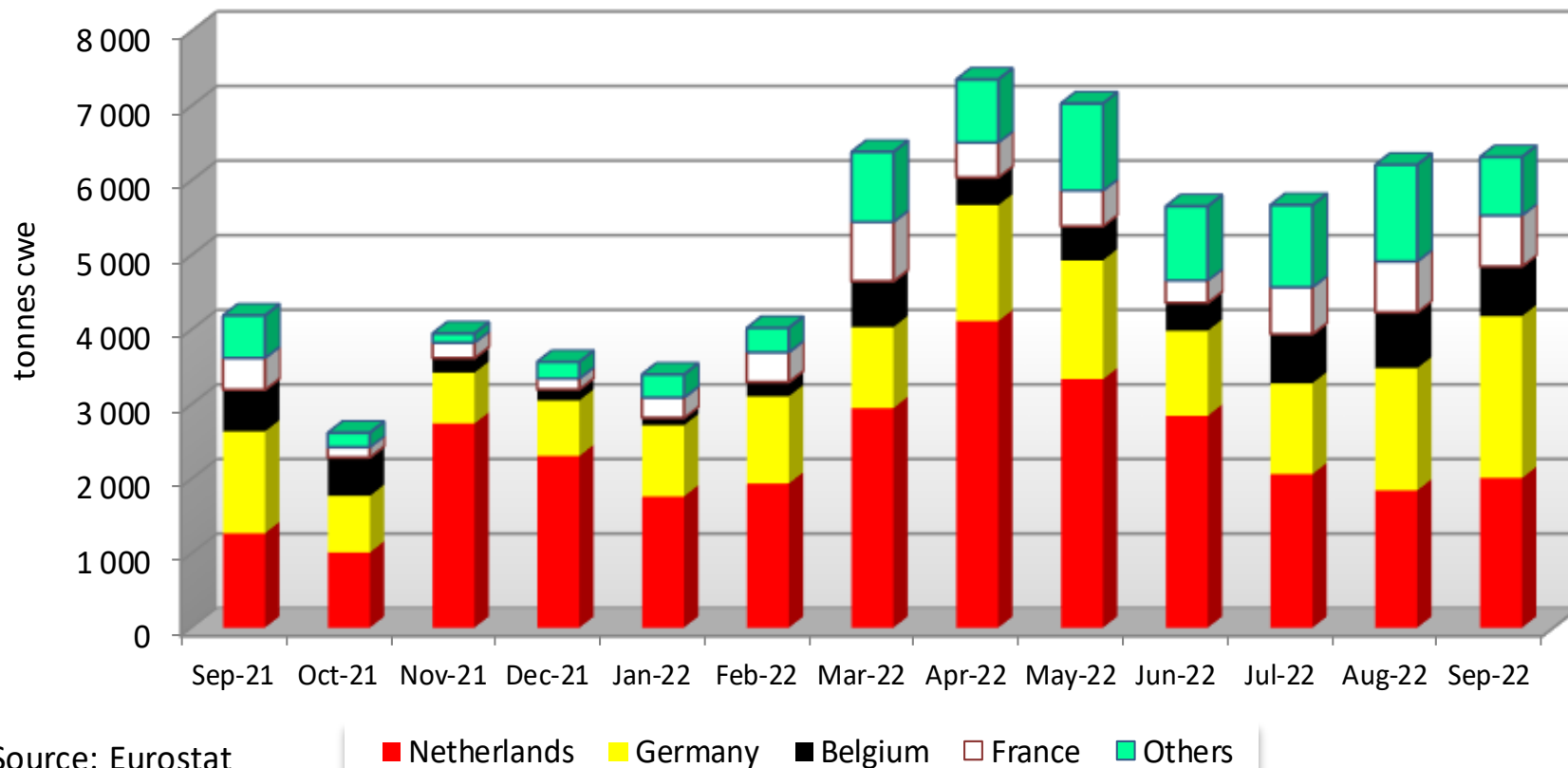


■ New Zealand ■ Australia ■ North Macedonia ■ Chile ■ Argentina ■ Other origins

EU Imports of Sheep and Goat products without UK

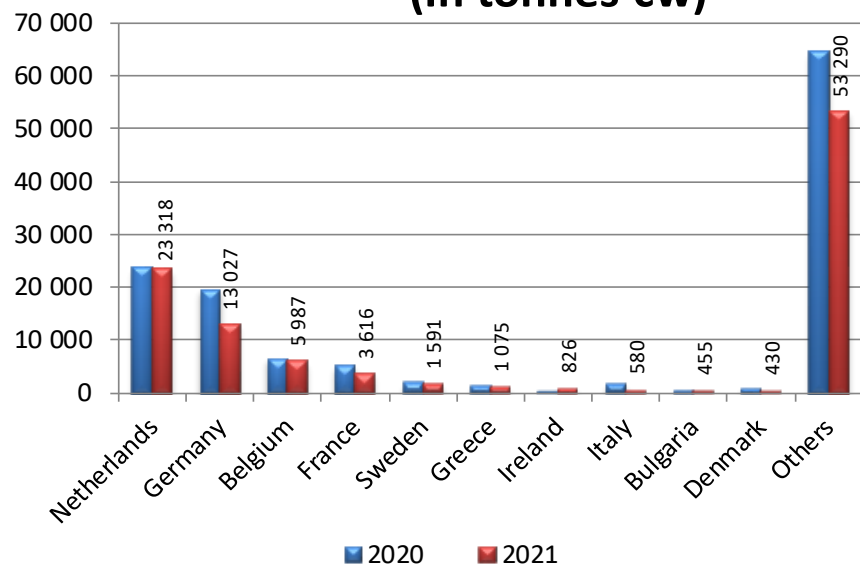


Evolution of NZ exports of sheep meat to the EU

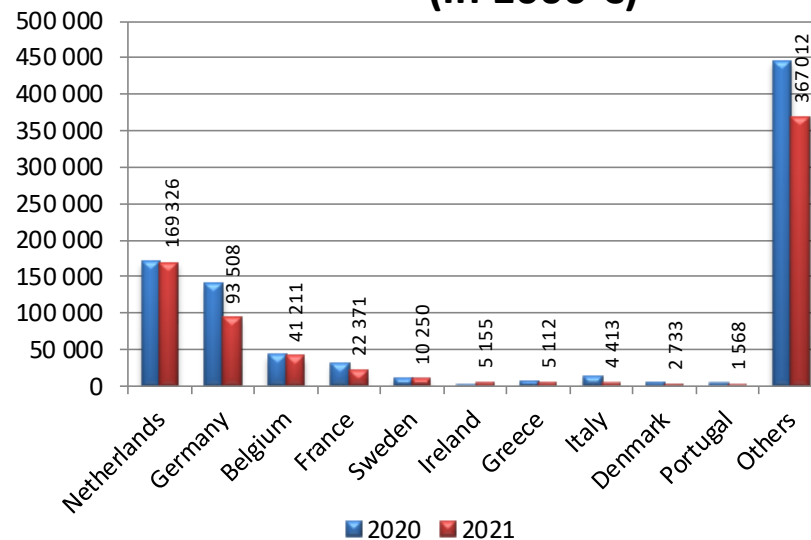


Evolution of Imports from NZ of sheep meat by MS

Imports from NZ by MS (In tonnes cw)

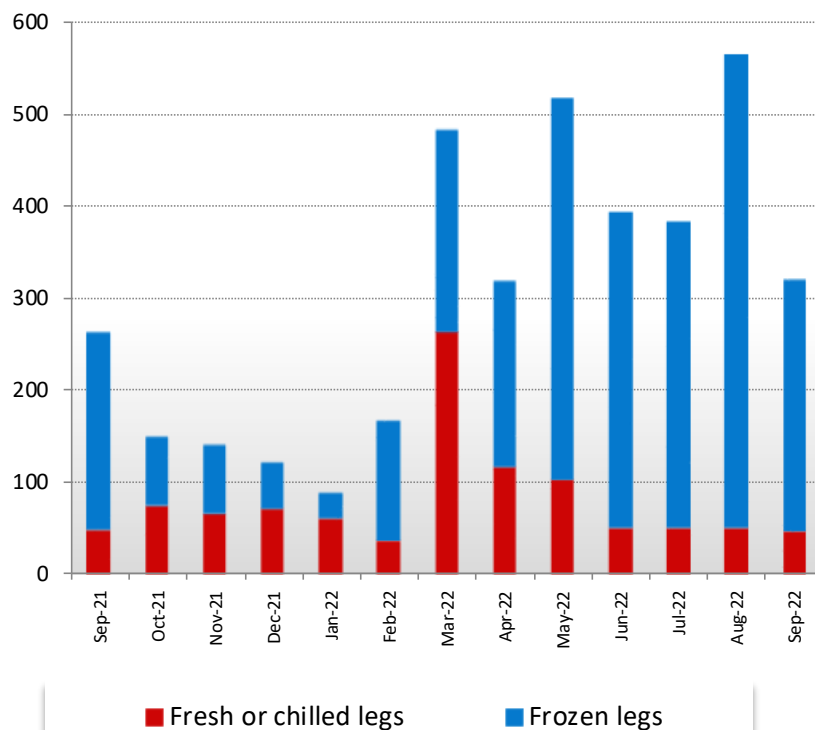


Imports from NZ by MS (In 1000 €)

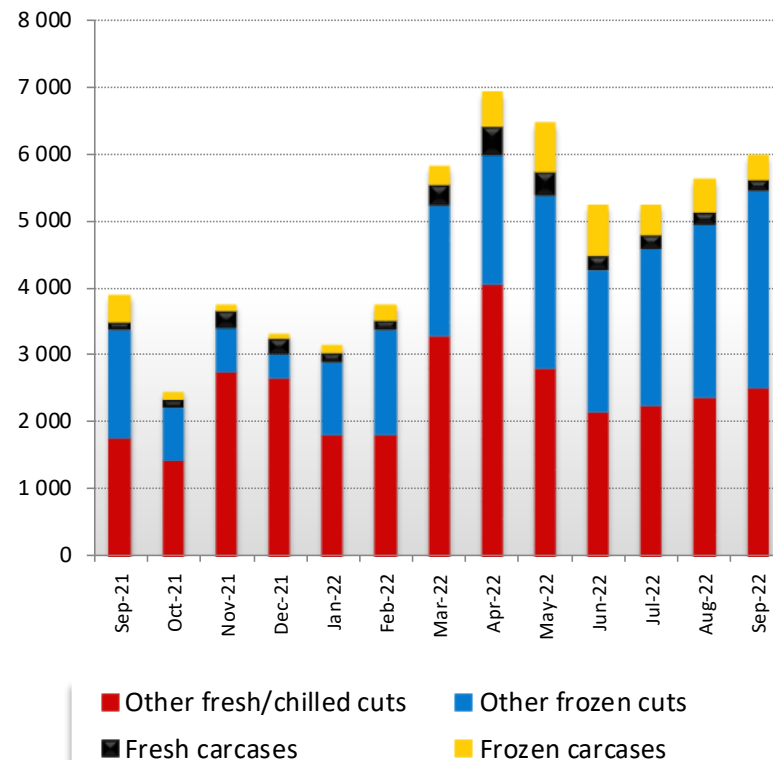


Evolution NZ Exports of sheep meat products to EU (in tonnes cw)

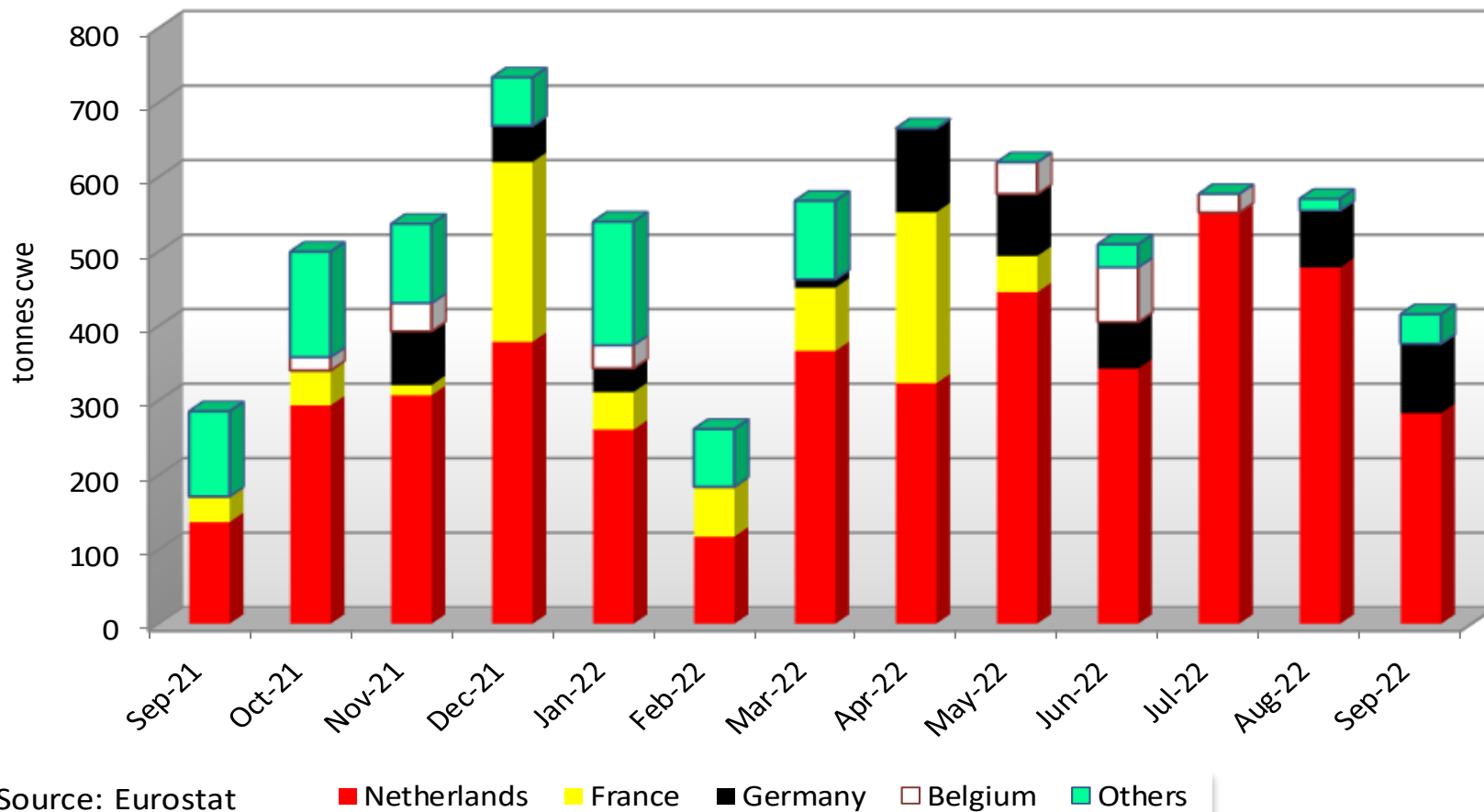
Sheep legs



Other meat products



Evolution of AUS exports of sheep meat to the EU



EU exports of sheep & goatmeat and live animals

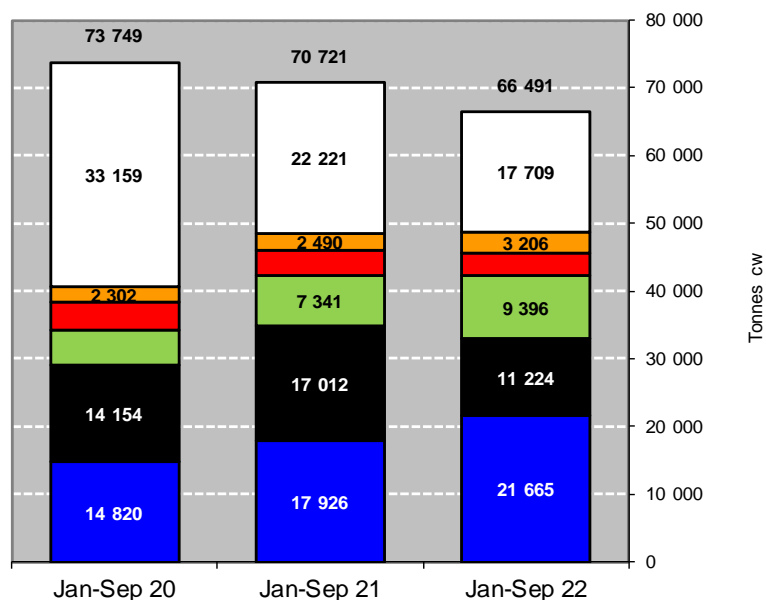
Trade figures (COMEXT)

EXPORT

	2018		2019		2020		2021		Jan-Sep 22		Compared to Jan-Sep 21
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Jordan	11 203	14.5%	11 073	11.6%	17 169	22.2%	21 792	25.3%	21 665	32.6%	+ 20.9%
Saudi Arabia	926	1.2%	9 482	9.9%	22 142	28.7%	20 147	23.4%	11 224	16.9%	- 34.0%
Israel	6 871	8.9%	7 060	7.4%	6 763	8.8%	8 923	10.4%	9 396	14.1%	+ 28.0%
Switzerland	3 806	4.9%	3 750	3.9%	5 039	6.5%	4 707	5.5%	3 291	4.9%	- 11.8%
Qatar	723	0.9%	2 297	2.4%	2 835	3.7%	2 988	3.5%	3 206	4.8%	+ 28.8%
Oman	1 560	2.0%	2 346	2.5%	2 995	3.9%	3 800	4.4%	2 390	3.6%	- 20.1%
U.A.Emirates	2 053	2.7%	1 747	1.8%	2 828	3.7%	2 448	2.8%	1 862	2.8%	- 14.7%
Bahrain	336	0.4%	1 329	1.4%	2 264	2.9%	1 271	1.5%	1 277	1.9%	+ 40.2%
Canada	1 579	2.0%	1 893	2.0%	1 832	2.4%	1 220	1.4%	1 265	1.9%	+ 47.3%
Kuwait	1 147	1.5%	2 446	2.6%	3 785	4.9%	2 440	2.8%	1 231	1.9%	- 35.6%
Lebanon	4 826	6.2%	5 595	5.9%	3 868	5.0%	1 708	2.0%	1 103	1.7%	- 29.1%
Gaza + Jericho	902	1.2%	1 053	1.1%	447	0.6%	1 141	1.3%	1 032	1.6%	- 1.6%
Ghana	1 102	1.4%	739	0.8%	852	1.1%	1 047	1.2%	792	1.2%	+ 1.9%
Libya	26 044	33.7%	23 156	24.3%	10 323	13.4%	1 606	1.9%	742	1.1%	- 52.1%
Ivory Coast	1 259	1.6%	702	0.7%	1 229	1.6%	1 229	1.4%	684	1.0%	- 23.2%
<i>Other Destinations</i>	12 907	16.7%	20 779	21.8%	11 422	14.8%	9 590	11.1%	5 331	8.0%	
Total to Third Countries	77 243		95 447		95 792		86 056		66 491		
% change			+ 24%		+ 0%		- 10%		- 6.0%		

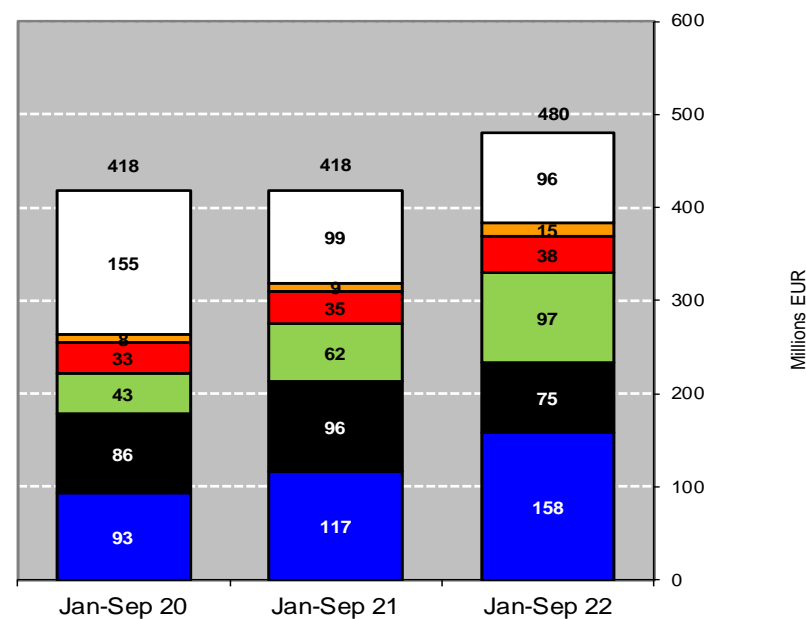
EU exports of sheep & goatmeat and live animals Trade figures (COMEXT)

EU EXPORTS of Sheep & Goat (Tonnes cwe)
without UK



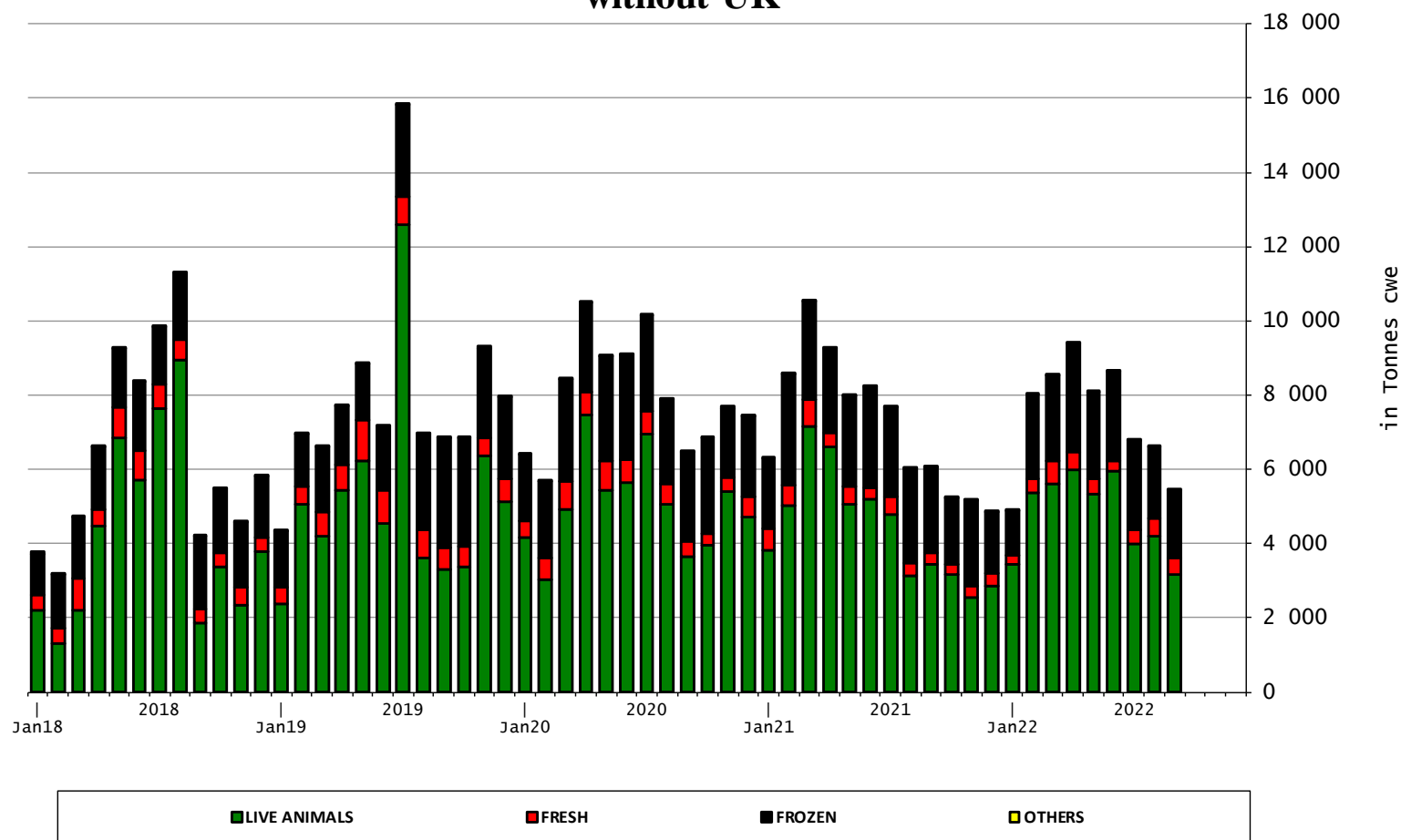
■ Jordan ■ Saudi Arabia ■ Israel ■ Switzerland ■ Qatar ■ Other destinations

EU EXPORTS of Sheep & Goat (Millions EUR)
without UK

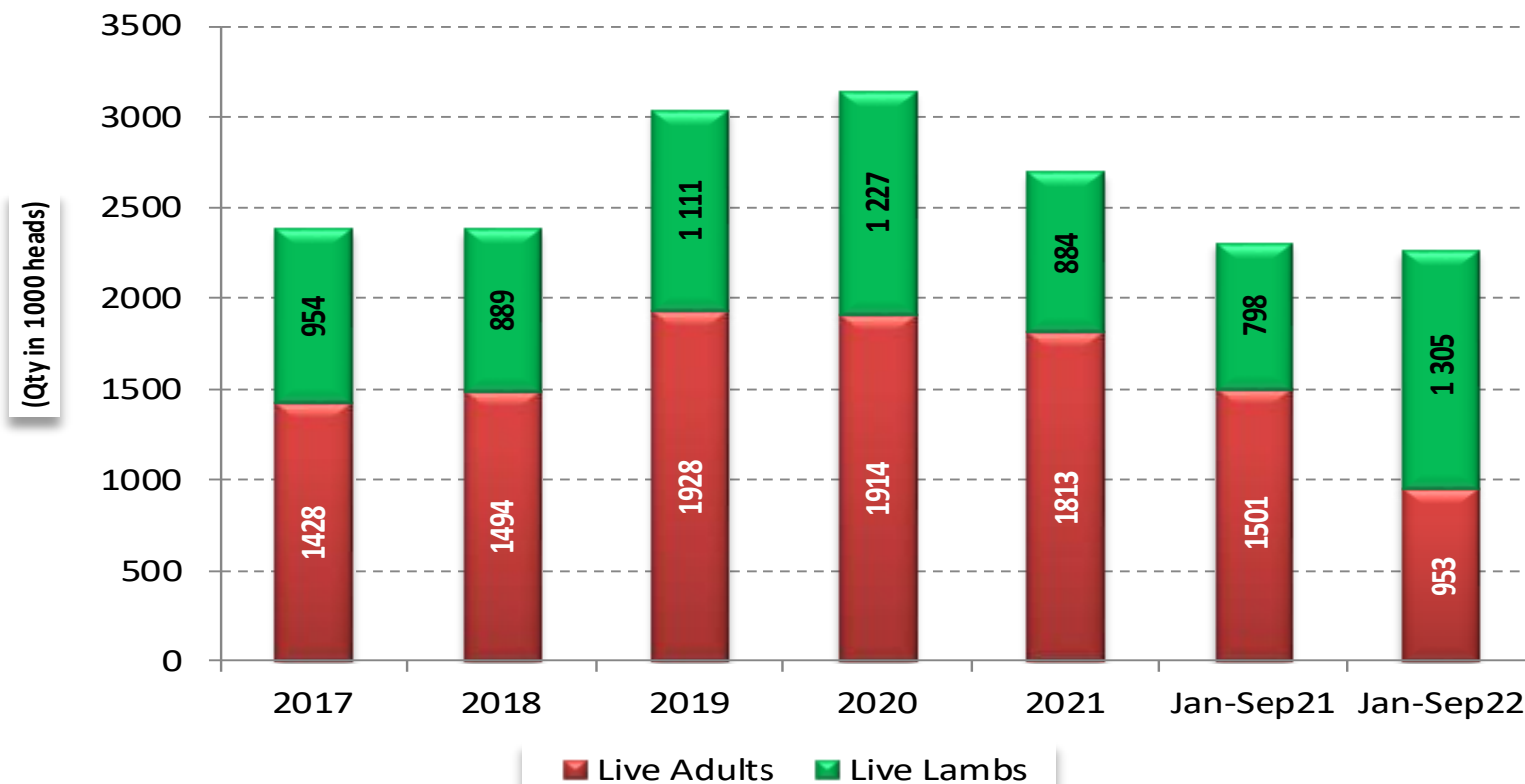


■ Jordan ■ Saudi Arabia ■ Israel ■ Switzerland ■ Qatar ■ Other destinations

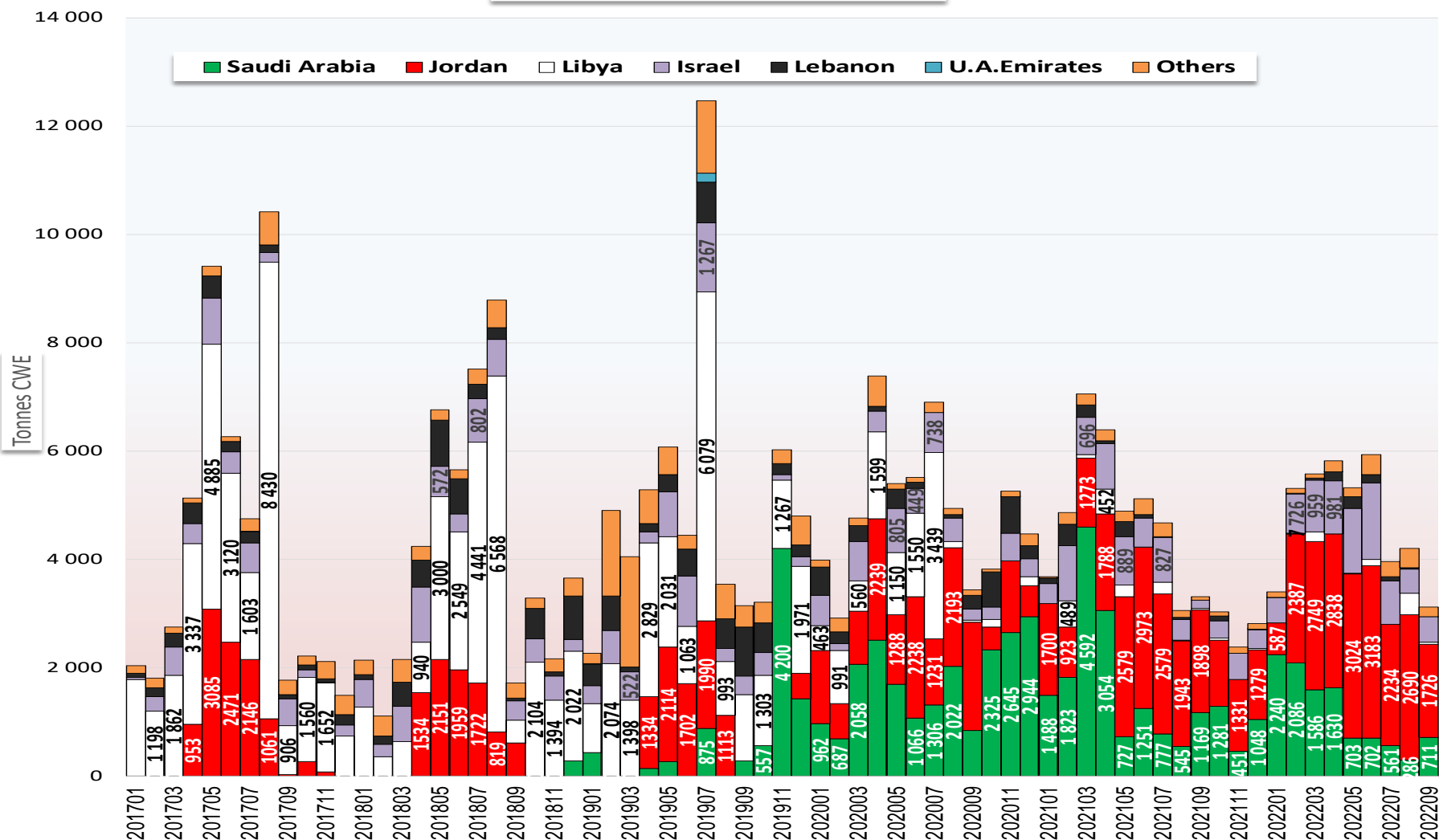
EU Exports of Sheep and Goat products without UK



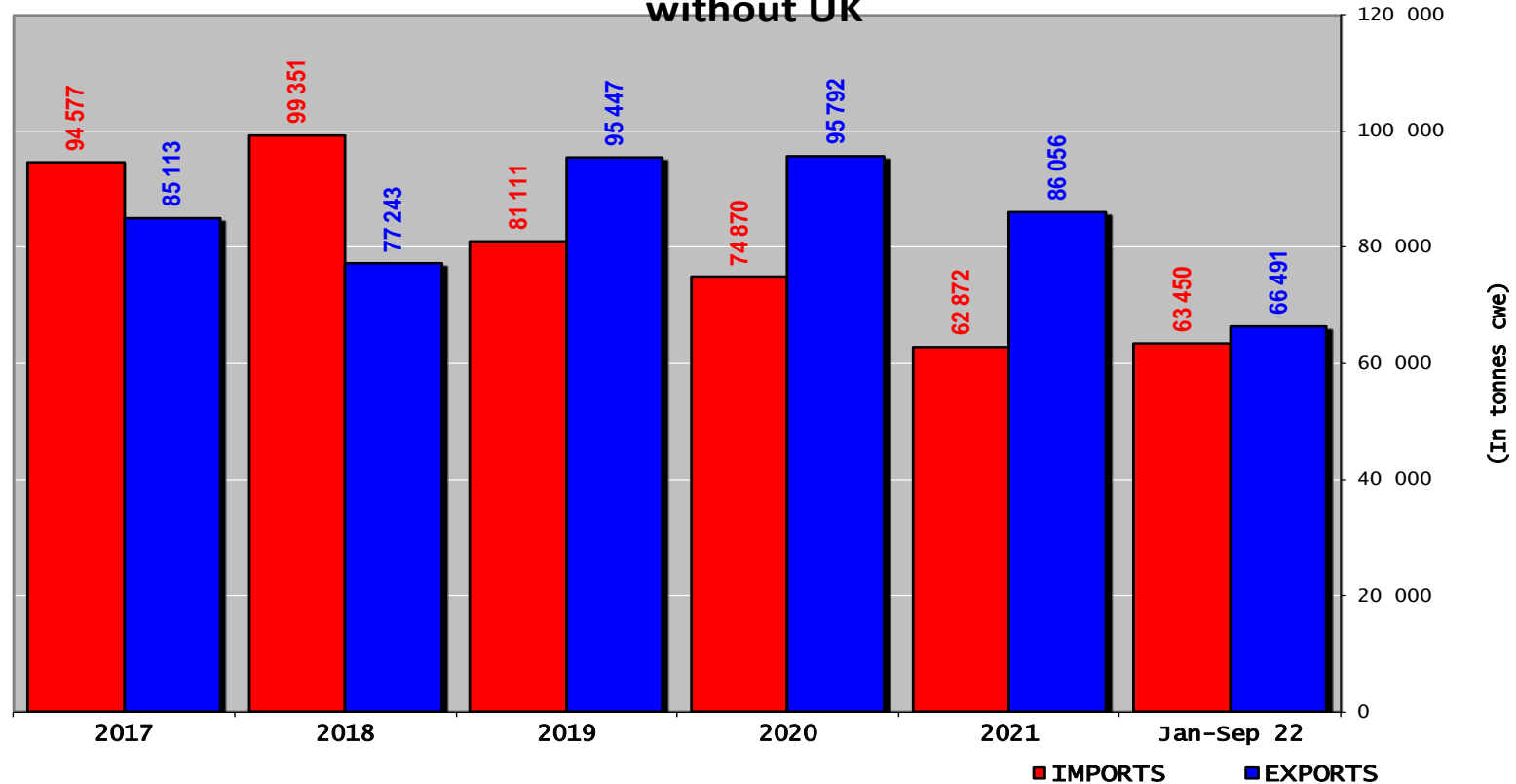
Evolution EU exports of live sheep (Excluding pure-bred breeding)



EU Exports of LIVE Sheep Animals
(Source COMEXT - Tonnes cwe)



Evolution of EU Sheep and Goat Trade Balance
without UK



TRADE WITH UK

EU Sheep and Goat Trade with UK from Jan to Aug 2022

In Tons of Carcase Weight

	2021	2022	2022/2021
Exports to UK	11 954	12 578	+5%
Live Animals	1	11	+++
Great Britain	0	9	+++
Northern Ireland	0	1	+++
Meats	11 953	12 568	+5%
Great Britain	11 086	11 147	+1%
Northern Ireland	867	1 420	+64%
Imports from UK	42 930	52 382	+22%
Live Animals	1 890	2 079	+10%
Great Britain	0	0	-25%
Northern Ireland	1 890	2 079	+10%
Meats	41 040	50 303	+23%
Great Britain	37 646	46 991	+25%
Northern Ireland	3 394	3 313	-2%

In Thousand Euros

	2021	2022	2022/2021
Exports to UK	51 751	60 858	+18%
Live Animals	4	102	+++
Great Britain	3	97	+++
Northern Ireland	1	5	+++
Meats	51 747	60 756	+17%
Great Britain	47 023	55 068	+17%
Northern Ireland	4 724	5 688	+20%
Imports from UK	304 892	#####	+29%
Live Animals	23 019	28 310	+23%
Great Britain	2	3	+92%
Northern Ireland	23 017	28 307	+23%
Meats	281 873	#####	+30%
Great Britain	265 742	#####	+31%
Northern Ireland	16 131	16 134	+0%

EU Export of SHEEP&GOAT to UK by Products from Jan to Aug

In Tons of Carcase Weight

	2020			2021			2022			% 2022/2021	
	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU
Live Animals	99	42 741	0.2%	1	40 805	0.0%	11	39 947	0.0%	+++	-2.1%
Meats	16 734	41 369	40.5%	11 955	35 797	33.4%	12 571	33 671	37.3%	+5.2%	-5.9%
Fresh	8 500	13 508	62.9%	4 980	8 800	56.6%	5 692	8 858	64.3%	+14.3%	+0.7%
Frozen	7 730	27 258	28.4%	4 844	24 733	19.6%	5 365	23 151	23.2%	+10.8%	-6.4%
Salted	1	5	17.9%	9	11	81.3%	2	7	36.4%	-72.3%	-38.2%
Prepared	424	512	82.9%	2 114	2 198	96.2%	1 508	1 585	95.1%	-28.7%	-27.9%
Salted Offals	79	86	91.5%	8	55	14.2%	4	70	5.2%	-53.9%	+26.4%
Total SHEEP&GOAT	16 832	84 110	20.0%	11 955	76 602	15.6%	12 582	73 618	17.1%	+5.2%	-3.9%

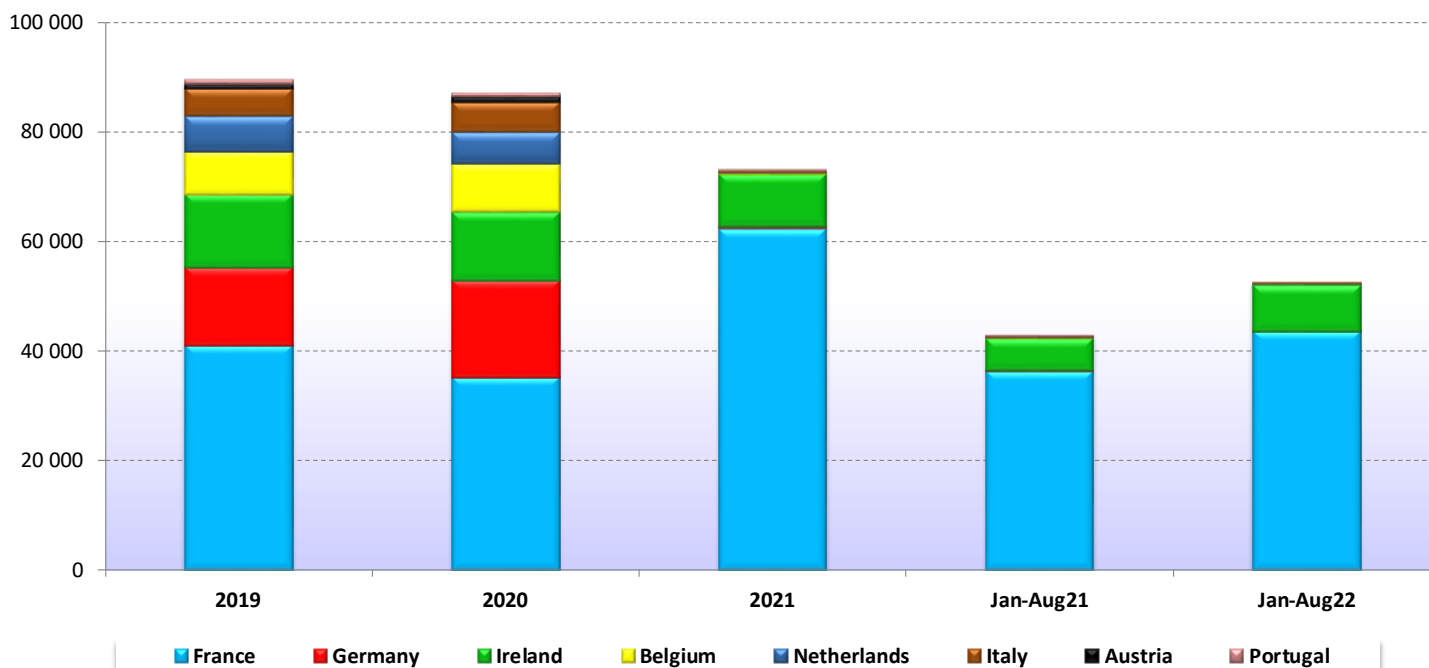
EU Import of SHEEP&GOAT from UK by Products from Jan to Aug

In Tons of Carcase Weight

	2020			2021			2022			% 2022/2021	
	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU
Live Animals	2 386	2 386	100.0%	1 890	1 899	99.6%	2 088	2 094	99.7%	+10.5%	+10.3%
Meats	52 861	104 934	50.4%	41 040	85 416	48.0%	50 395	106 814	47.2%	+22.8%	+25.1%
Fresh	45 515	61 745	73.7%	38 582	56 715	68.0%	47 406	65 666	72.2%	+22.9%	+15.8%
Frozen	5 670	41 512	13.7%	1 341	27 582	4.9%	1 968	40 123	4.9%	+46.7%	+45.5%
Salted	319	320	99.9%	0	1	0.0%	0	4	0.1%		+191.7%
Prepared	47	47	99.1%	131	132	99.3%	139	139	99.6%	+6.1%	+5.7%
Salted Offals	1 310	1 310	100.0%	986	986	100.0%	882	882	100.0%	-10.6%	-10.6%
Total SHEEP&GOAT	55 248	107 321	51.5%	42 931	87 315	49.2%	52 483	108 908	48.2%	+22.3%	+24.7%

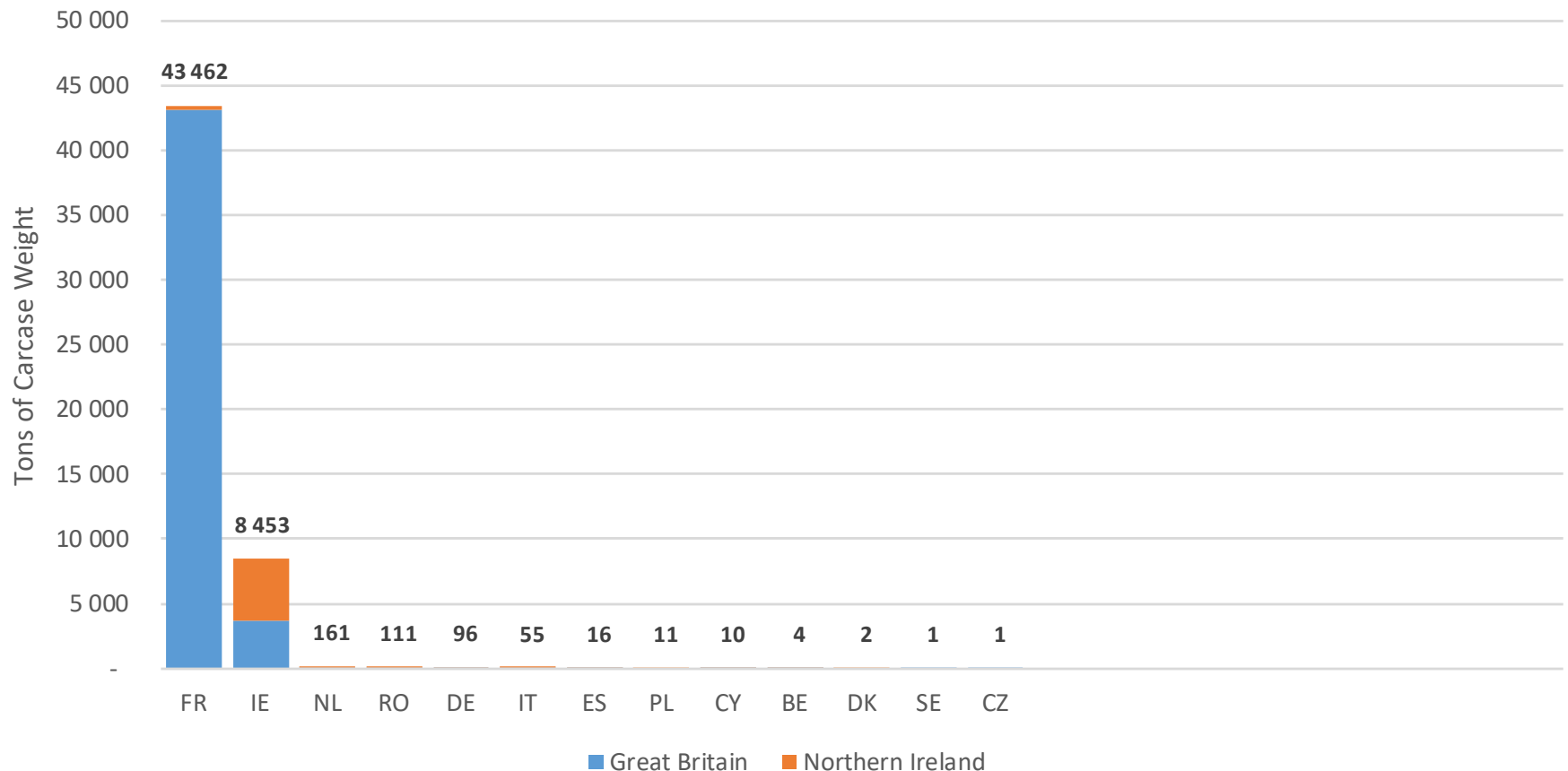
TRADE WITH UK

UK sheep meat to EU
(tonnes CW)



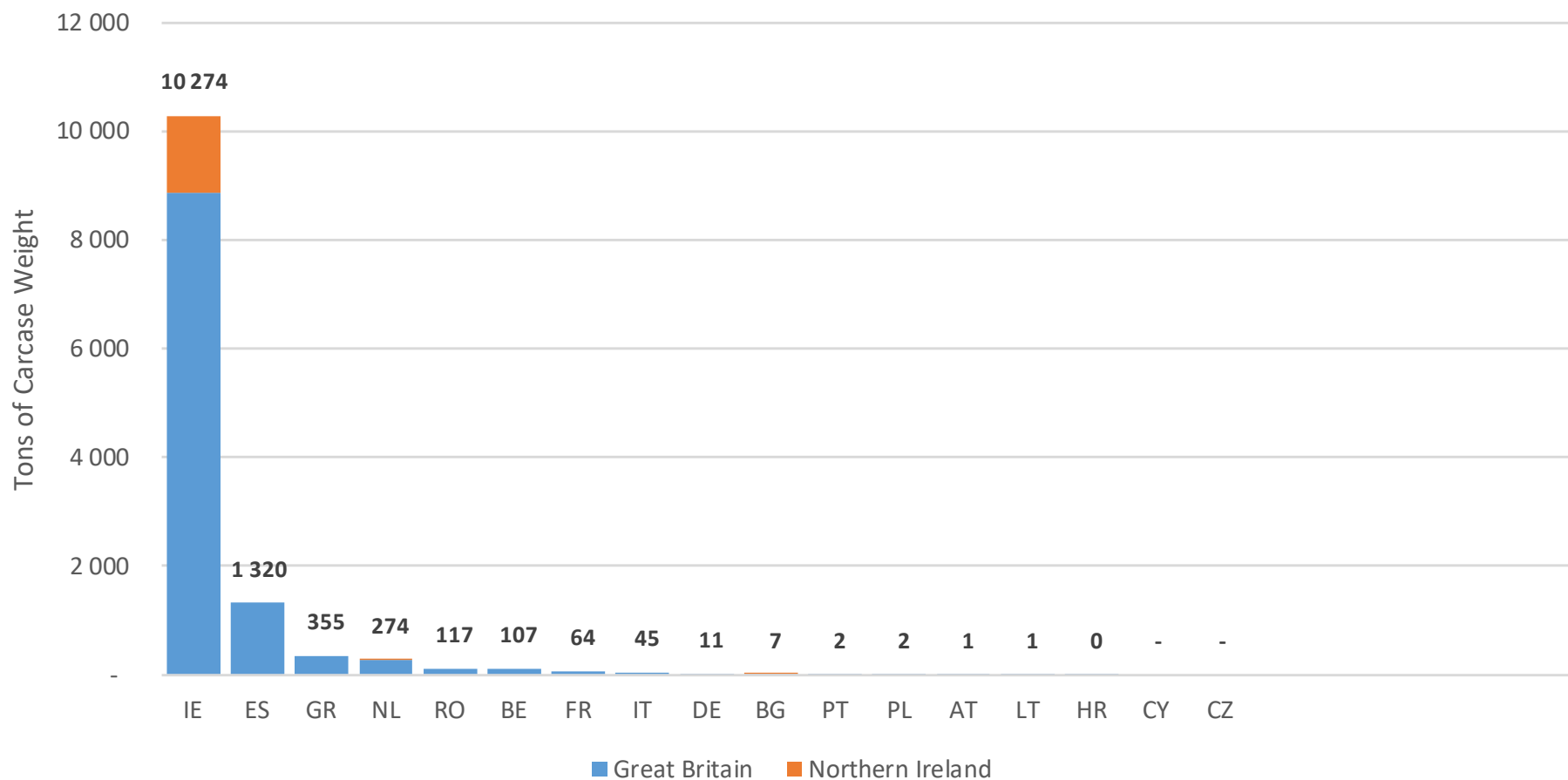
TRADE WITH UK

EU Imports of Sheep and Goat from UK
from Jan to Aug 2022 in Tons of Carcase Weight

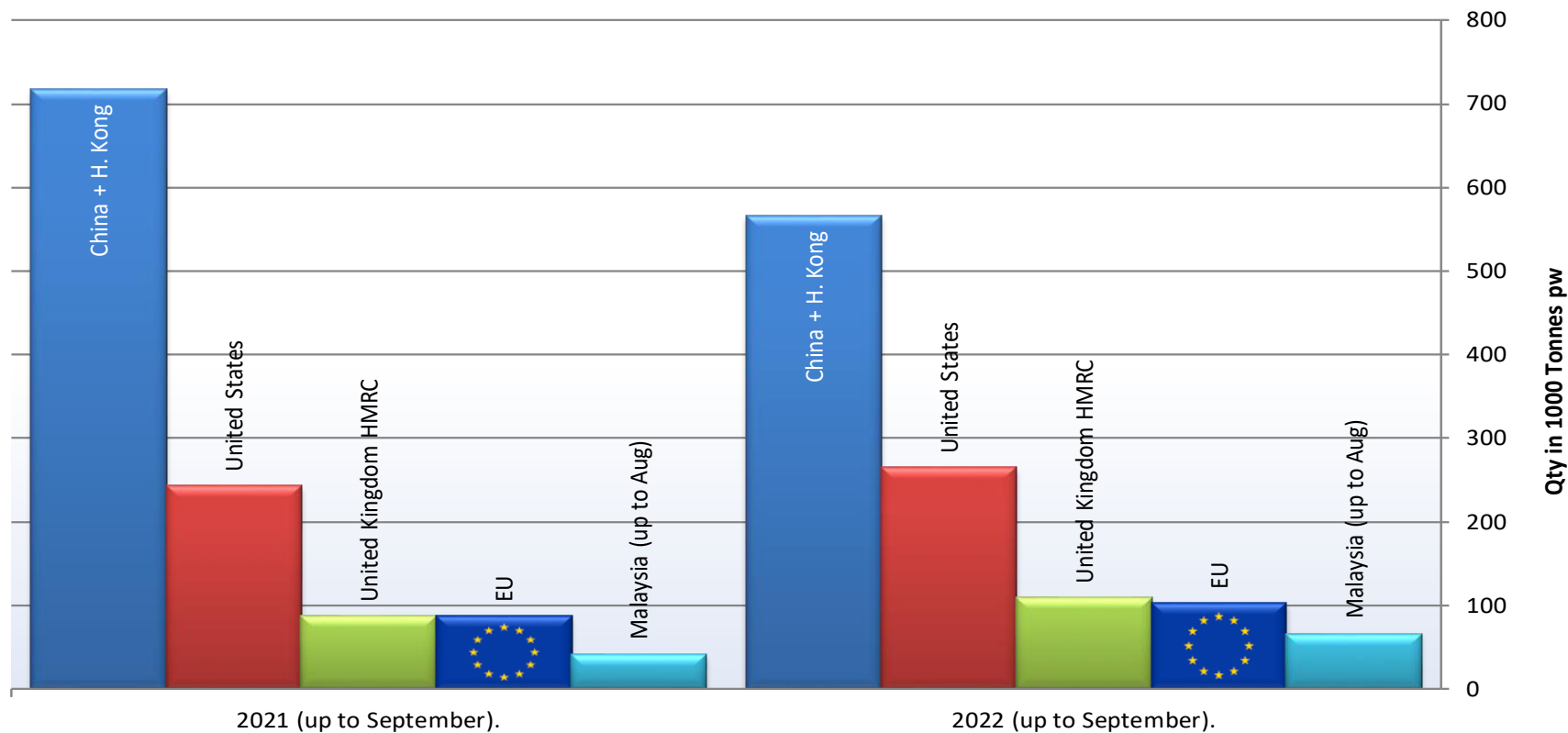


TRADE WITH UK

EU Exports of Sheep and Goat to UK from Jan to Aug 2022 in Tons of Carcase Weight



Main Importers of SHEEP&GOAT Products (up to September).

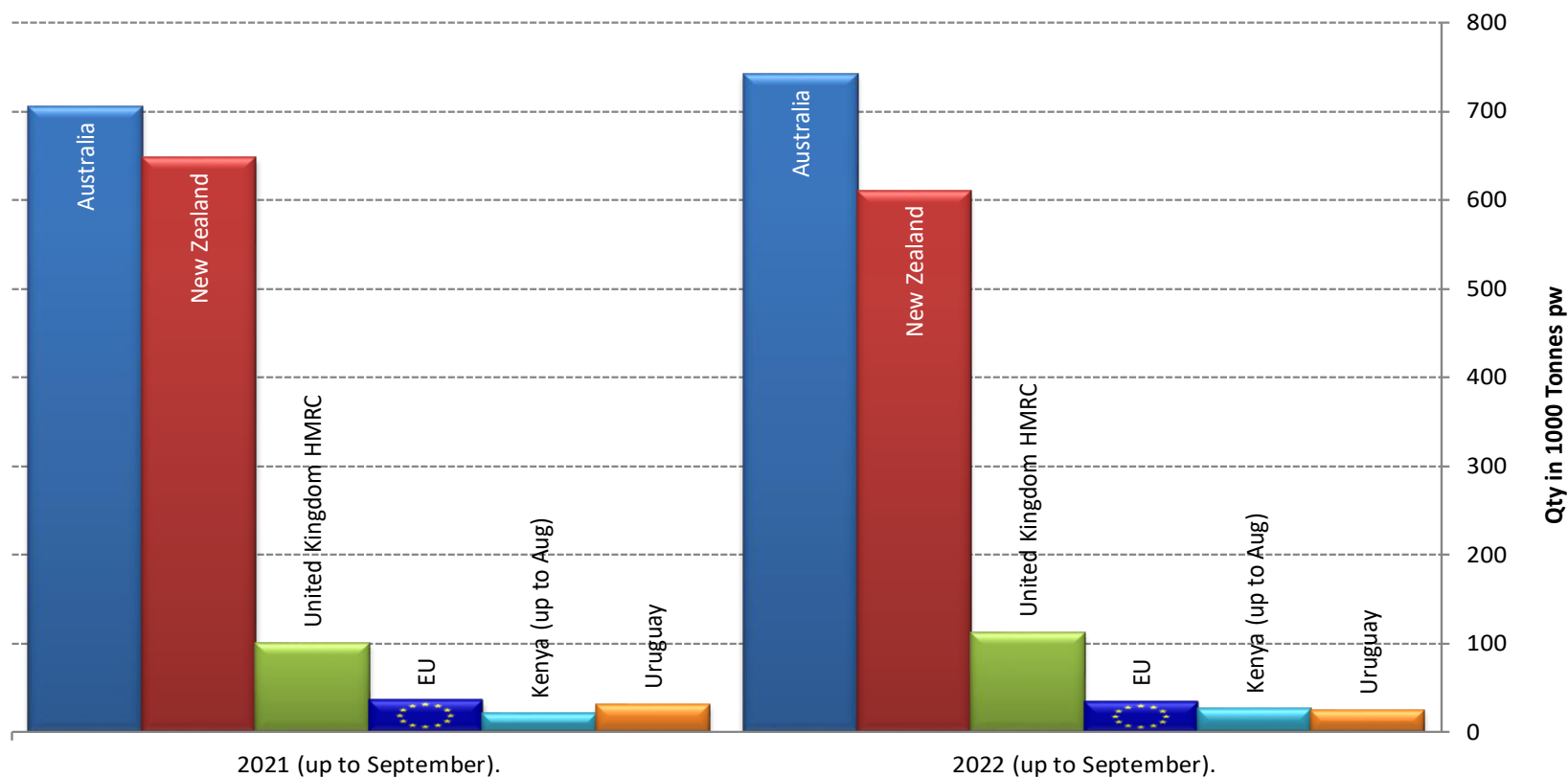


Source : GTA

Excl. Live animals

WORLD MARKET

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



Source : GTA

Excl. Live animals



Outlook

SHEEP LIVESTOCK (Thousand Heads)

Estimates of Autumn 2022

	2021	2022	2023(f)	22/21 %	23/22 %
BE	114.0	118.0	112.0	+ 3.5%	- 5.1%
BG	1 199.5	1 150.0	1 120.0	- 4.1%	- 2.6%
CZ					
DK					
DE	1 508.1	1 490.0	1 500.0	- 1.2%	+ 0.7%
EE					
IE	2 975.5	3 000.0	2 960.0	+ 0.8%	- 1.3%
EL	7 800.0	7 600.0	7 600.0	- 2.6%	
ES	15 919.2	15 544.5	15 000.0	- 2.4%	- 3.5%
FR	6 999.0	6 929.0	6 825.0	- 1.0%	- 1.5%
HR	654.0	654.0	654.0		
IT	6 393.8	6 330.0	6 300.0	- 1.0%	- 0.5%
CY					
LV	90.3	90.3	90.3		
LT	136.9	136.9	136.9		
LU					
HU	887.0	910.0	900.0	+ 2.6%	- 1.1%
MT	12.7	12.7	12.7		
NL	729.0	729.0	729.0		
AT	402.4	402.4	402.4		
PL					
PT	2 238.0	2 238.0	2 238.0		
RO	10 049.9	10 049.9	10 049.9		
SI					
SK	252.4	268.9	268.9	+ 6.5%	
FI	140.0	131.0	125.0	- 6.4%	- 4.6%
SE	348.5	335.0	322.0	- 3.9%	- 3.9%
EU	58 850	58 120	57 346	- 1.24%	- 1.33%

GOAT LIVESTOCK (Thousand Heads)

Estimates of Autumn 2022

	2021	2022	2023(f)	22/21 %	23/22 %
BE	76.0	76.0	74.0		- 2.6%
BG	215.0	190.0	175.0	- 11.6%	- 7.9%
CZ					
DK					
DE	146.0	144.0	145.0	- 1.4%	+ 0.7%
EE					
IE	8.5	8.5	8.5		
EL	3 500.0	3 200.0	3 100.0	- 8.6%	- 3.1%
ES	2 708.1	2 662.0	2 500.0	- 1.7%	- 6.1%
FR	1 387.0	1 387.0	1 373.0		- 1.0%
HR	86.0	86.0	86.0		
IT	1 049.9	1 050.0	1 040.0	+ 0.0%	- 1.0%
CY					
LV	11.4	11.4	11.4		
LT	14.7	14.7	14.7		
LU					
HU	46.0	40.0	40.0	- 13.0%	
MT	5.6	5.6	5.6		
NL	575.0	575.0	575.0		
AT	100.6	100.6	100.6		
PL					
PT	350.5	350.5	350.5		
RO	1 486.0	1 486.0	1 486.0		
SI					
SK	10.4	10.6	10.6	+ 1.9%	
FI	6.0	5.9	5.0	- 1.7%	- 15.3%
SE					
EU	11 783	11 404	11 101	- 3.22%	- 2.66%

OUTLOOK

EU Sheep Production (expert forecast Autumn 2022)

Thousand tonnes

	2021	2022	2023	2022/2021	2023/2022
ES	120.38	120.45	110.36	0.1%	-8.4%
FR	81.80	79.90	78.90	-2.3%	-1.3%
RO	73.25	73.25	73.25	0.0%	0.0%
IE	58.00	62.20	63.00	7.2%	1.3%
EL	44.00	45.00	44.00	2.3%	-2.2%
IT	37.20	39.00	39.00	4.8%	0.0%
DE	37.30	30.10	33.30	-19.3%	10.6%
PT	15.94	15.94	15.94	0.0%	0.0%
NL	15.63	15.63	15.63	0.0%	0.0%
BG	9.56	9.90	9.80	3.6%	-1.0%
AT	6.77	6.77	6.77	0.0%	0.0%
HR	5.51	5.51	5.51	0.0%	0.0%
SE	4.72	4.55	4.39	-3.6%	-3.5%
CY	2.62	2.62	2.62	0.0%	0.0%
HU	2.67	2.70	2.60	1.1%	-3.7%
BE	2.67	2.15	2.00	-19.5%	-7.0%
DK	1.30	1.30	1.30	0.0%	0.0%
PL	1.14	1.14	1.14	0.0%	0.0%
FI	1.23	1.00	1.00	-18.7%	0.0%
SK	0.74	0.70	0.70	-5.6%	0.0%
LV	0.45	0.45	0.45	0.0%	0.0%
EE	0.17	0.17	0.17	0.0%	0.0%
LT	0.17	0.17	0.17	0.0%	0.0%
SI	0.16	0.16	0.16	0.0%	0.0%
MT	0.15	0.15	0.15	0.0%	0.0%
CZ	0.14	0.14	0.14	0.0%	0.0%
LU	0.05	0.05	0.05	0.0%	0.0%
EU	523.7	521.1	512.5	-0.5%	-1.7%

XX No expert data, using Eurostat data instead

OUTLOOK

EU Goat Production (expert forecast Autumn 2022)

Thousand tonnes

	2021	2022	2023	2022/2021	2023/2022
EL	14.00	15.00	14.00	7.1%	-6.7%
RO	11.87	11.87	11.87	0.0%	0.0%
ES	10.13	11.15	10.75	10.1%	-3.6%
FR	6.21	6.43	6.52	3.5%	1.4%
NL	2.84	2.84	2.84	0.0%	0.0%
CY	2.53	2.53	2.53	0.0%	0.0%
IT	2.20	2.30	2.30	4.5%	0.0%
BG	1.92	2.00	2.00	4.2%	0.0%
PT	1.24	1.24	1.24	0.0%	0.0%
AT	0.67	0.67	0.67	0.0%	0.0%
HR	0.50	0.50	0.50	0.0%	0.0%
DE	0.45	0.35	0.40	-22.2%	14.3%
BE	0.38	0.38	0.34	0.0%	-10.5%
HU	0.19	0.17	0.17	-10.5%	0.0%
PL	0.03	0.03	0.03	0.0%	0.0%
FI	0.01	0.03	0.03	200.0%	0.0%
CZ	0.00	0.00	0.00		
DK	0.00	0.00	0.00		
EE	0.00	0.00	0.00		
IE	0.00	0.00	0.00		
LV	0.00	0.00	0.00		
LT	0.00	0.00	0.00		
LU	0.00	0.00	0.00		
MT	0.00	0.00	0.00		
SI	0.00	0.00	0.00		
SK	0.00	0.00	0.00		
SE	0.00	0.00	0.00		
EU	55.2	57.5	56.2	4.2%	-2.3%

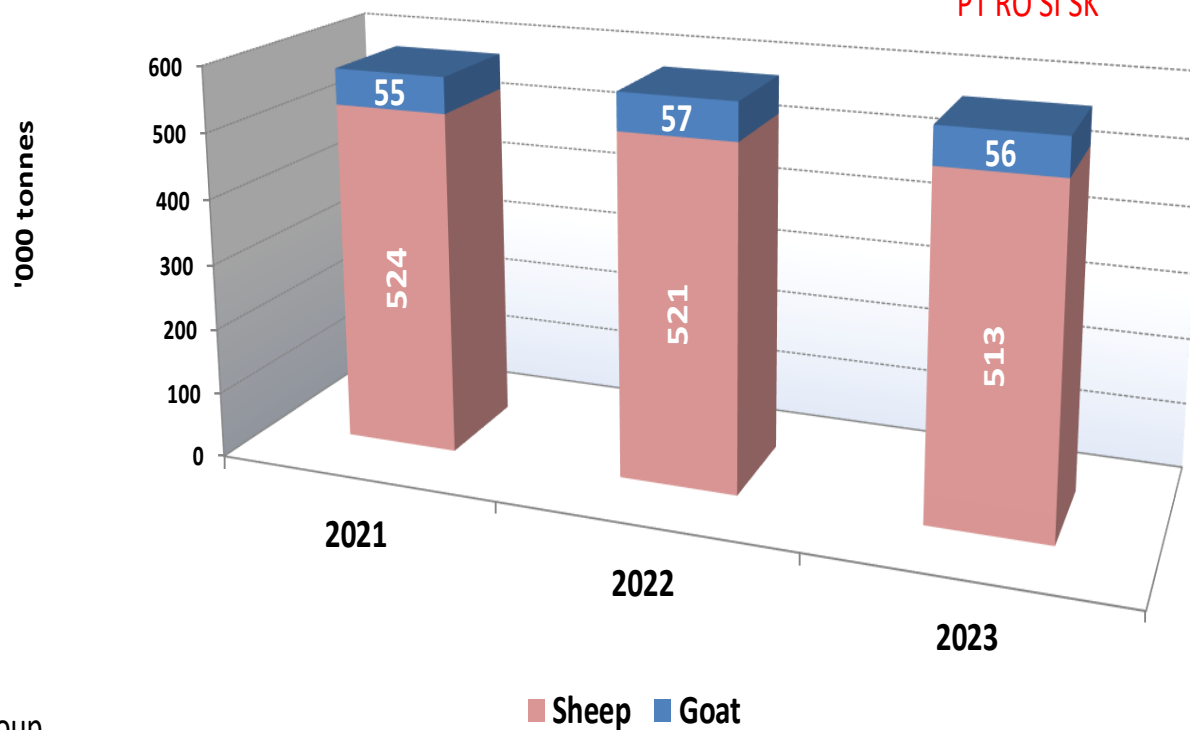
XX No expert data, using Eurostat data instead

OUTLOOK

Sheep + goat net production
(Foreseen from WG* experts)

Missing expert data from :

CZ DK EE HR CY LV LT LU MT NL AT PL
PT RO SI SK



(*) Working Group



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