



Meat MO Economic Board

16 March 2017

- o The 3rd meeting of the Economic Board of the Meat Market Observatory (Meat MO) took place on 16 March 2017, with the participation of experts from the various steps in the meat supply chain.
- o To explicit the factual basis on which the Observatory is operating, DG AGRI services provided a presentation on data sourcing and market transparency (See Annex I) and presented a pilot project for a new web portal on prices, production and export data.
- o Views were exchanged on the use of available data and on the possibilities to improve market transparency along the supply chain. Sound data on consumption and wholesale prices for meat were identified as the most important data need.
- o The exchange of views on the beef and veal and pigmeat market situation was based on factual presentations by DG AGRI (see Annexes II and III).
- o For pigmeat, discussions showed a moderate optimism. The domestic market supports reasonable prices and the exceptionally good export performance contributes to producers' price recovery and a re-balancing of the market. Low feed costs and a favourable exchange rate had also a positive impact on the sector.
- o Concerns relate to the high dependence on exports to China.
- o Diversifying export markets remains a priority for the EU pigmeat sector.
- o For beef and veal, discussions showed that the EU beef market seems to be regaining balance following a very difficult year 2016. However pressure on producer prices remains and a considerable number of EU producers are facing serious financial difficulties.
- o The current and future evolution of internal EU consumption and the impact of FTAs and Brexit are matters of major concern.
- o Positive aspects are relatively low feed costs and good export performance. Exports of live bovines are essential for internal market balance.
- o Eurocommerce provided a presentation (See Annex IV) on trends in sales of meat products from a retail perspective.
- o Overall, exports are being essential to keep the market balanced. Efforts to gain and improve market access must continue.
- o Overall, the members of the Economic Board expressed growing concern on declining trends in meat consumption. That poses a major challenge for the future of the sector.
- o The next meeting of the Meat MO Economic Board is scheduled for 13 June 2017.

Annex I



DATA SOURCING FOR IMPROVED MARKET TRANSPARENCY

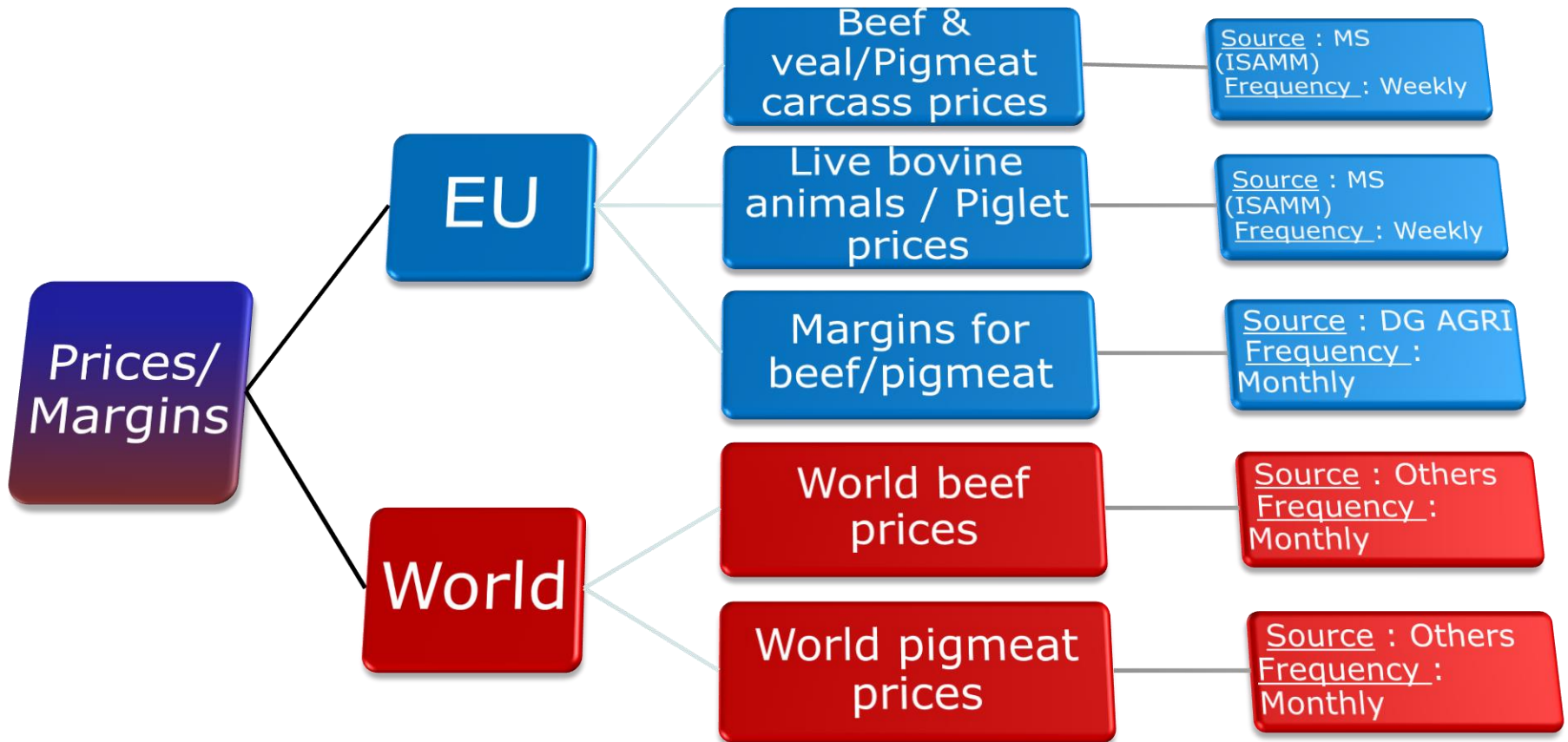
**Meat Market Observatory
Economic Board Meeting
16 March 2016**

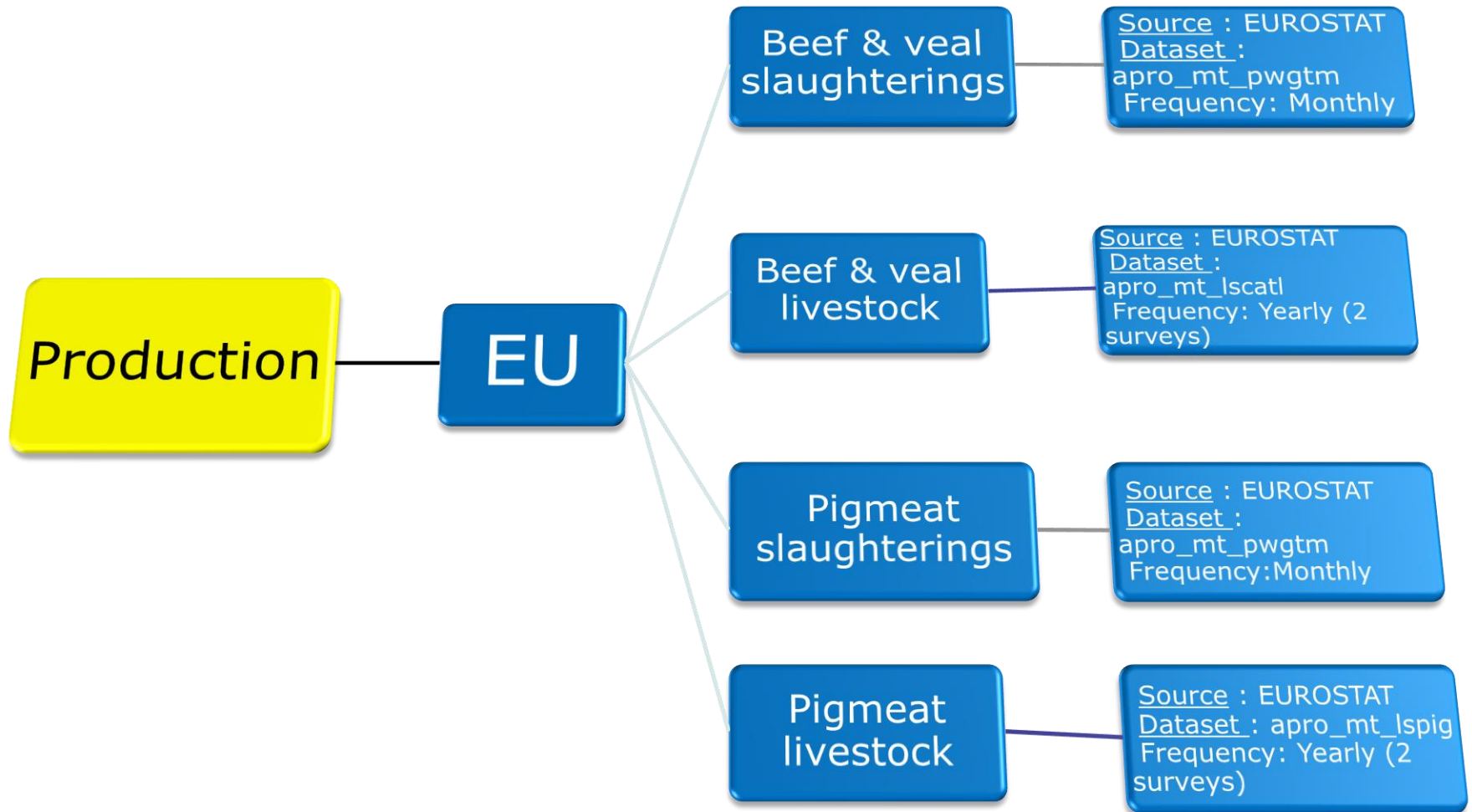
Reflexion and exchange of views on:

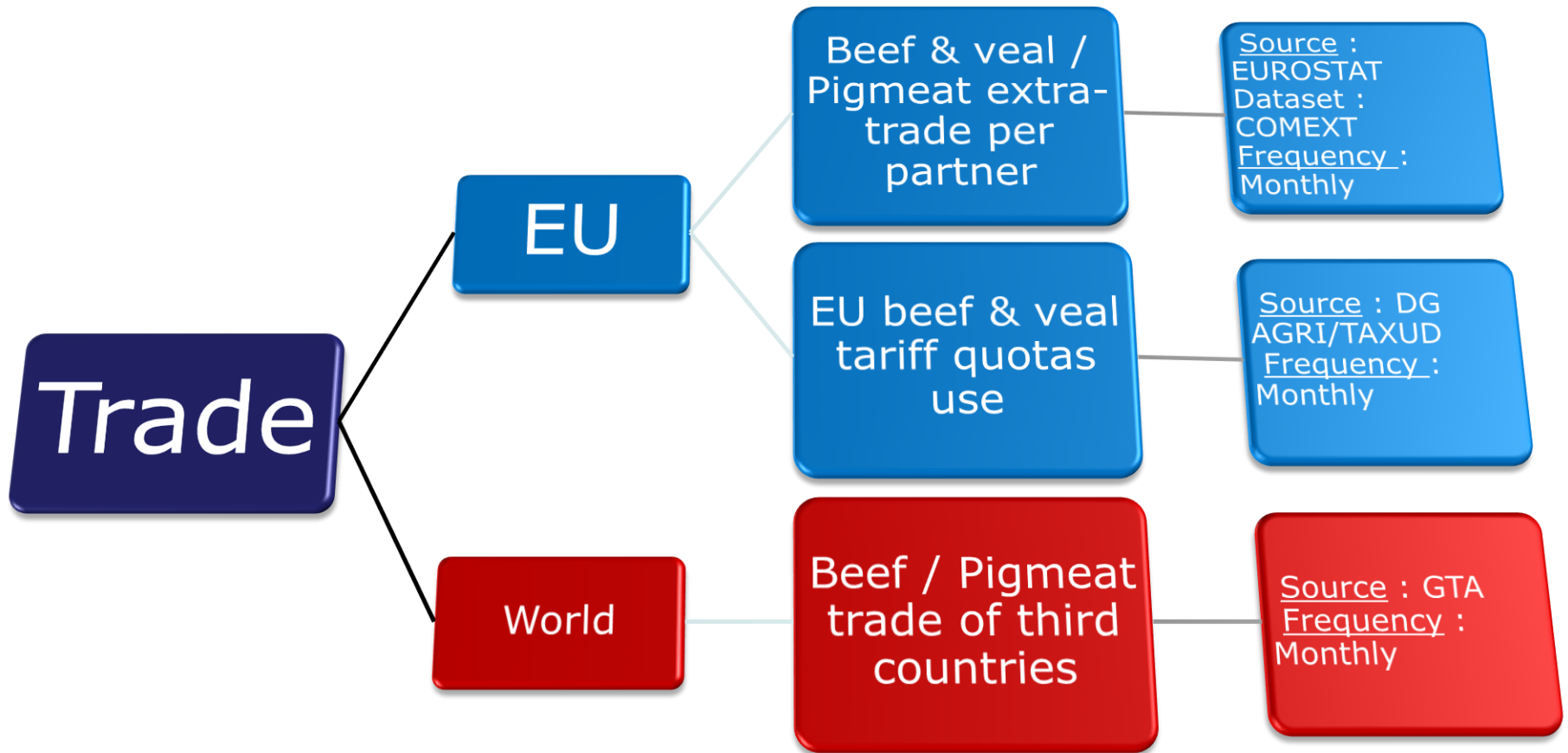
- *Data available*
- *Data gaps*
- *Suggestions for:*
 - **possible options to address current data gaps**
 - **increase transparency and provide additional information tools to supply chain actors**

Data currently available and used

- *Producer's prices*
- *Producer's production data*
- *Trade data*







Main data gaps in key market indicators

- *Consumption data*
- *Price indicators in processing, wholesale and retail stages*
- *Production in processing, wholesale and retail stages*

The future?

- *Example: Agricultural Markets Task Force recommendations*

What can we do now?

- *Inventory of existing data sources (and assess appropriateness...)*
- *Improve dissemination*
- *Elaborate consensuated indicators with existing data*
- *Any other ideas?*

Existing data sources

- *Consumption:*
 - **Official EU data: Eurostat-Consumption expenditure of private households (hbs_str_t221)**
 - **Balance sheets (outlooks, etc...)**
- *Production:*
 - **Official EU data: Eurostat-Production in industry - monthly data (sts_inpr_m)**
- *Prices*
 - **Official EU data: Eurostat-Producer prices in industry, total - monthly data (sts_inpp_m), Food Price Monitoring Tool (FPMT)**

Existing data sources

- *Other?:*
 - **National data: ex, France AgriMer, Food Prices Observatory in Spain**
 - **Private data: consultants**
 - **Sectorial data**

Existing data sources

- *Production and consumption: of very limited use because different reasons (outdated datasets, not enough detail, etc...*
- *Prices: potential use of:*
 - **FPMT**
 - **National Observatories (FR and ES)**



European Commission

Food Price Monitoring Tool (FPMT)

eurostat
Your key to European statistics

European Commission > Eurostat > Harmonised Indices of Consumer Prices (HICP) > Methodology > Food price monitoring tool

News | Data | Publications | About Eurostat | Help

HARMONISED INDICES OF CONSUMER PRICES (HICP)

Statistics illustrated
Overview

- Data
Main tables
Database

- Methodology
Metadata and national practices
Reference year 2015=100
Euro area
Recommendations
Compliance monitoring
HICP at constant tax rates
HICP - administered prices
Detailed average prices
FOOD PRICE MONITORING TOOL

Legislation
- Publications
News releases
Statistical articles
Compendium
Data in focus
Technical and thematic news releases

News releases | Data Database | Publications All publications | About us Overview | Opportunities Calls for tenders

FOOD PRICE MONITORING TOOL

Following the European Commission Communication on 'A better functioning food supply chain in Europe' the Food Price Monitoring Tool was created in an attempt to increase the transparency along the food supply chain.

The tool brings together available data on price developments in the different steps of the supply chain. At present, 15 supply chains are covered. For each, the following price indices are used to show developments at successive stages of the chain:

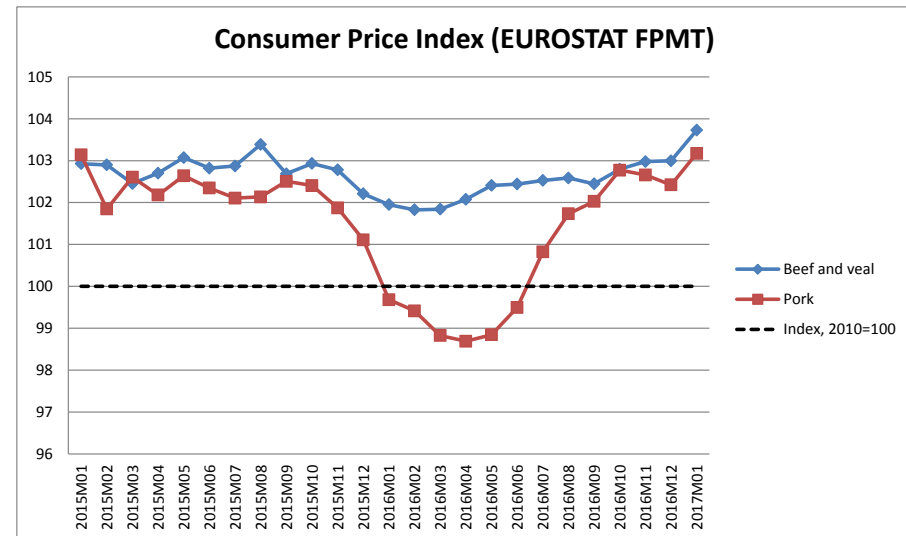
- price index for agricultural commodities
- import price index
- domestic producer price index
- harmonised index of consumer prices

More information about the monitoring tool can be found here.

Data:
FPMT dataset (Price indices and annual rates of price change)

Communication from the Commission on a better functioning food supply chain in Europe — Directorate-General Economic and Financial Affairs

Example of data use:



Example: FranceAgriMer (FR)

FranceAgriMer  RESEAU DES NOUVELLES DES MARCHÉS

Bilans de campagne Restauration collective Conjoncture Indicateurs réglementaires Le RNM Connexion

prix par Marché **prix par Produit**

> Produits Fruits et Légumes Fleurs **Pêche et aquaculture** Beurre Oeuf Fromage > Viande

Viande

Sélectionner un groupe de produits :

- | | | |
|----------------|------------------|----------------|
| Bovins | Ovins | Porcins |
| Caprins | Volailles | Gibiers |

Sélectionner un produit :

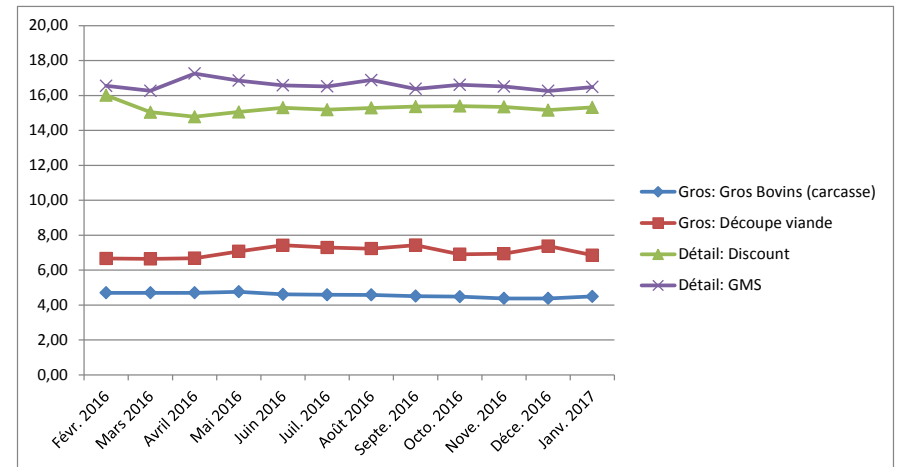
- | | | | |
|-------------------|----------|-------------|-----------|
| agneau | autruche | biche | boeuf |
| caille | canard | cane | chapon |
| chapon de pintade | chevreau | chevreuil | coche |
| cochon | coq | dinde | foie gras |
| Jeune bovin | lapin | mini chapon | oie |
| pigeon | pintade | porc | porcelet |
| poularde | poule | poulet | sanglier |
| veau | | | |

Contacts Mentions légales Partager 

<https://www.RNM.FranceAgriMer.fr>

Le prix des produits alimentaires frais

Example of data use:

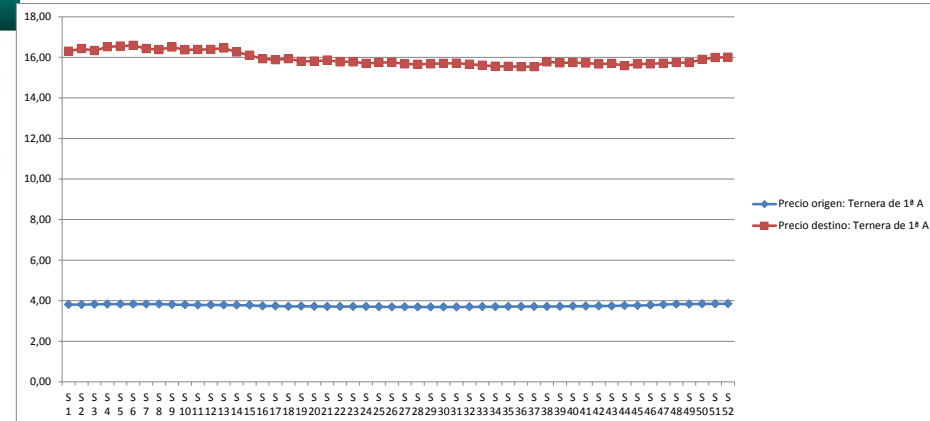


Example: Observatorio de Precios de los Alimentos (ES)



The screenshot shows the homepage of the 'Observatorio de Precios de los Alimentos' (Food Price Observatory) website. At the top, there is a header with the Spanish government logo and the text 'GOBIERNO DE ESPAÑA MINISTERIO DE AGRICULTURA Y PESCA, ALIMENTACIÓN Y MEDIO AMBIENTE'. Below this is a navigation bar with links like 'Inicio', 'Áreas de actividad', and 'Participación pública'. The main content area features a large banner with the title 'Observatorio de Precios de los Alimentos' and a search bar. Below the banner, there are three main sections: 'Organización y Estructura', 'Formación de precios', and 'Precios semanales'. Each section has a sub-header and a brief description with a link to more information. A sidebar on the left contains a menu with categories like 'Temas', 'Servicios', and 'Organismos y organizaciones'.

Example of data use:





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Happy to discuss

Annex II

PIGMEAT MARKET SITUATION



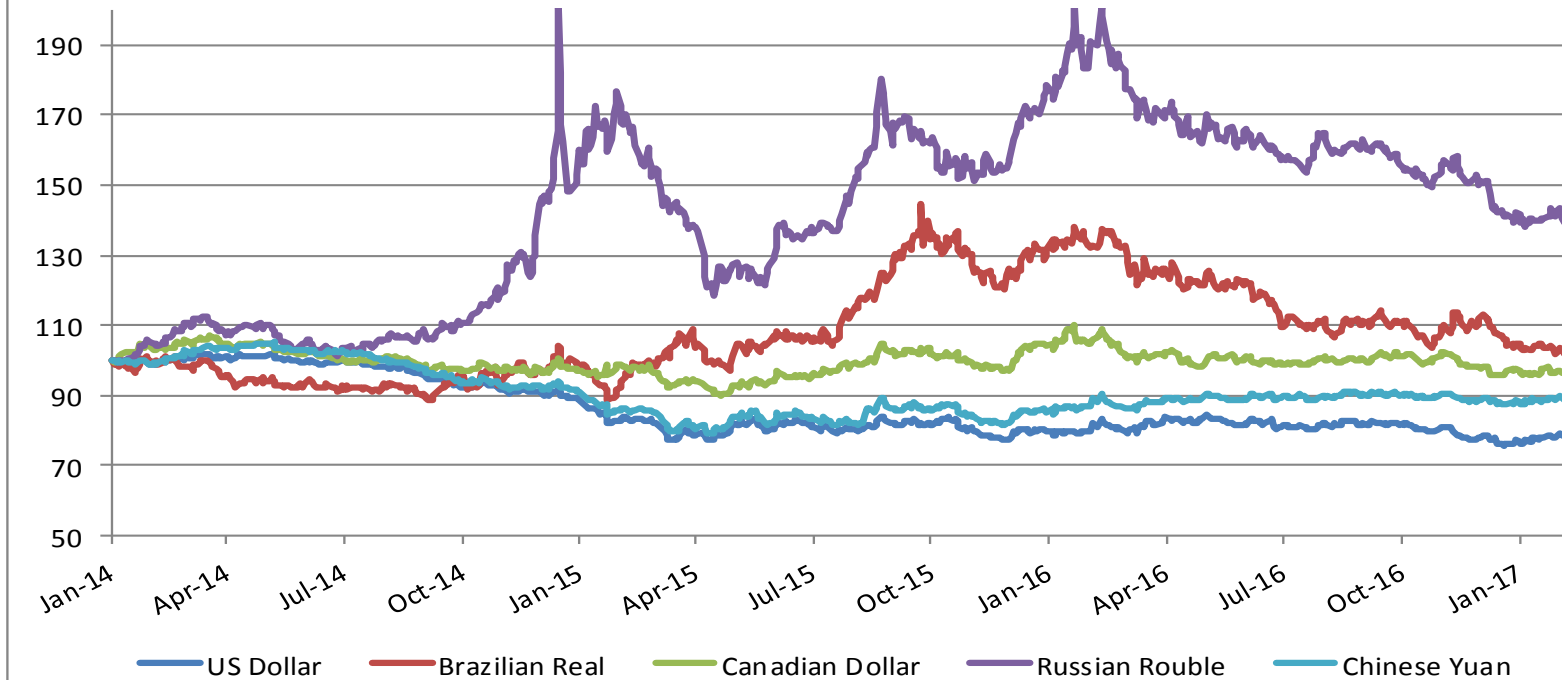
Meat Market Observatory – Economic Board Meeting

16 March 2017

EXCHANGE RATE INDEX/EURO



Index of daily exchange rates of the main trading partners compared to the Euro (02/01/14 = 100)





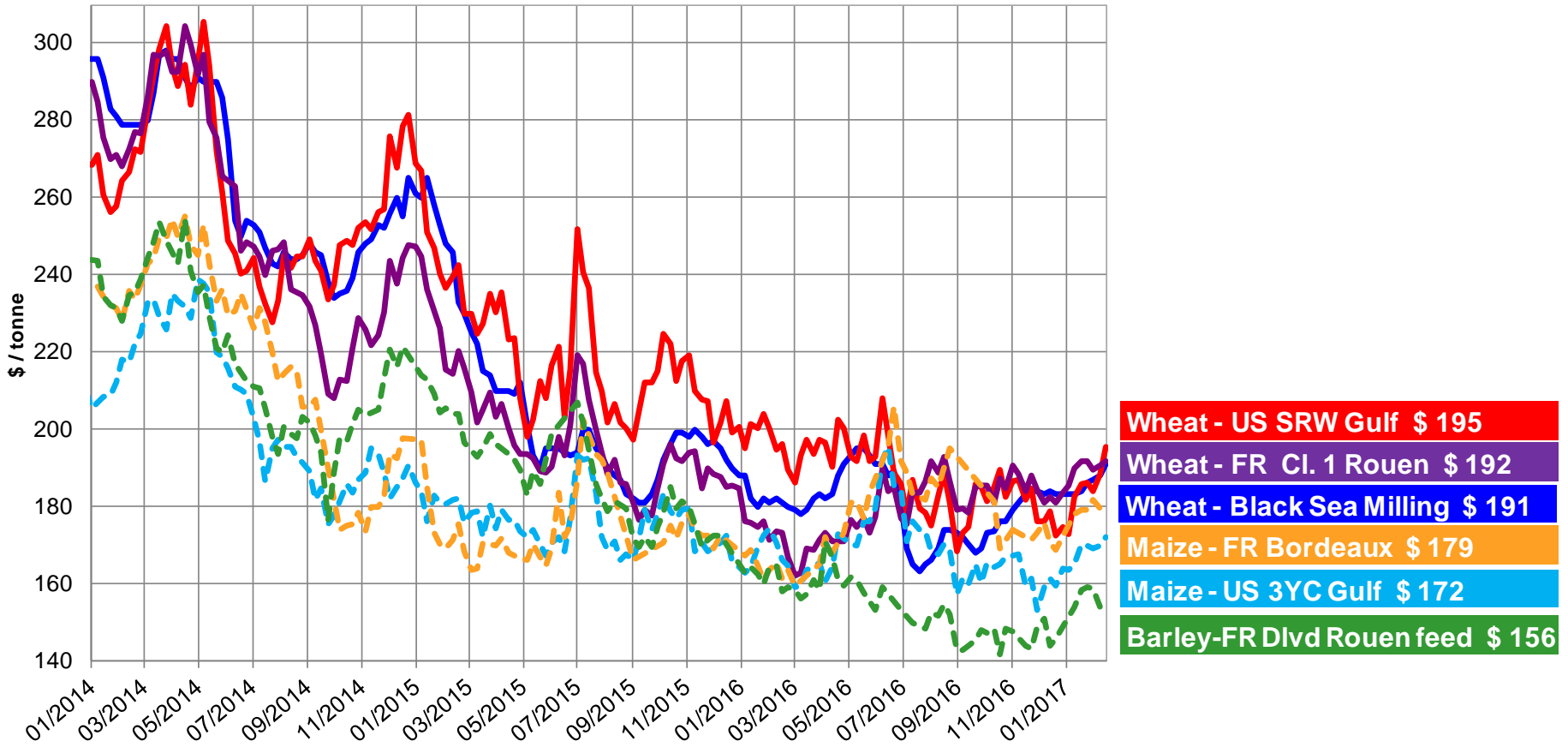
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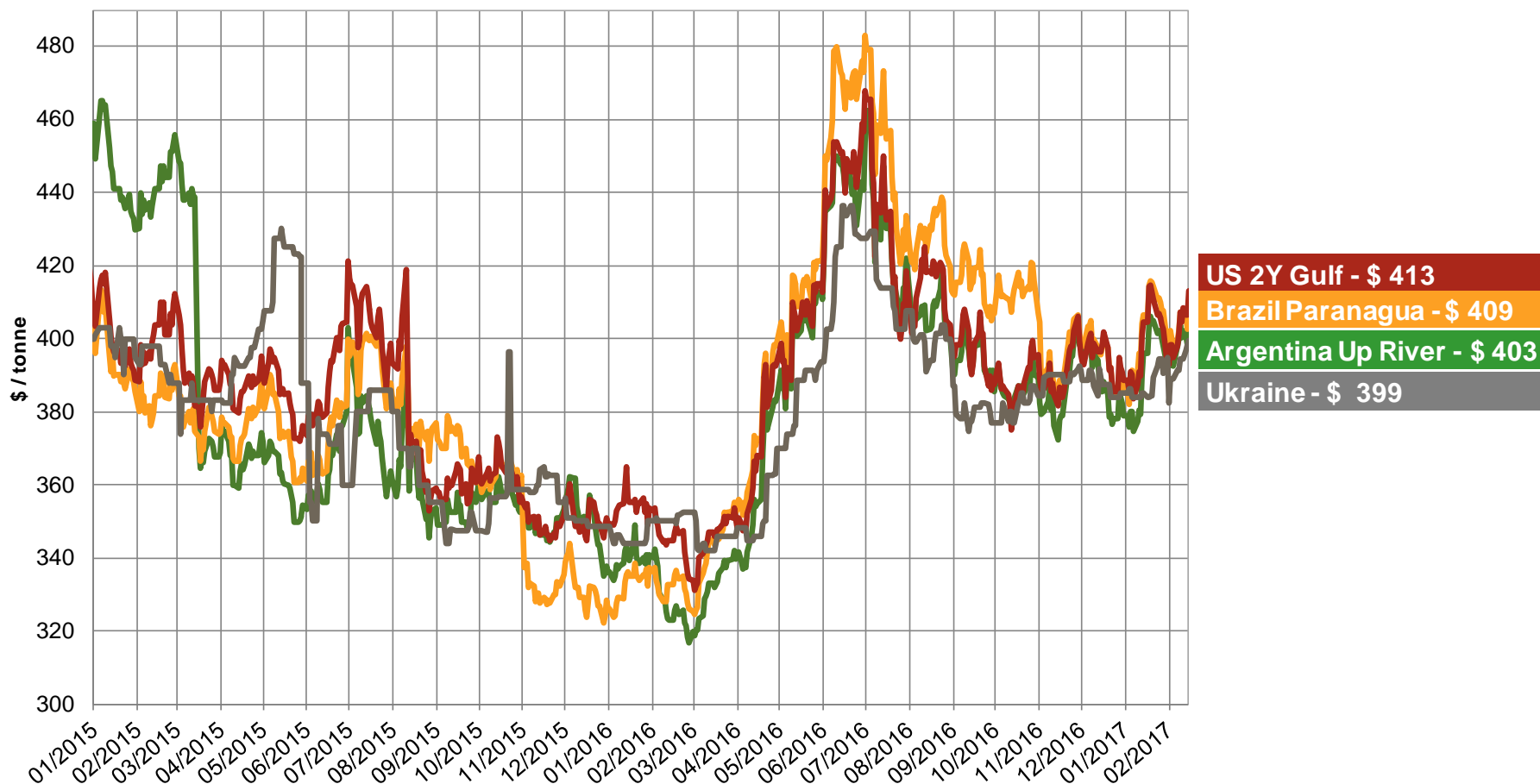
Feed costs



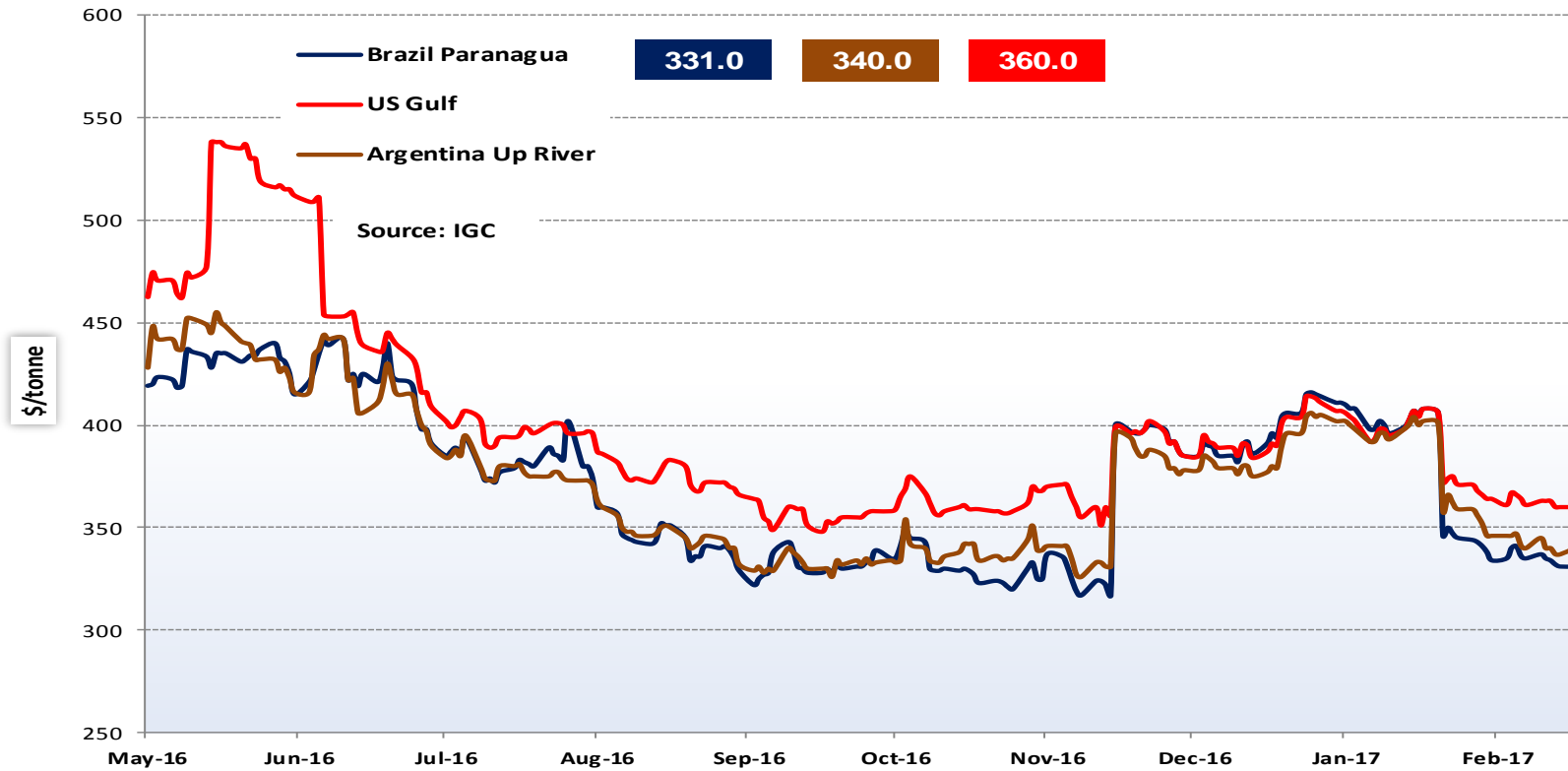
World cereal prices (\$/t)



Soyabeans export prices \$/ton (fob)



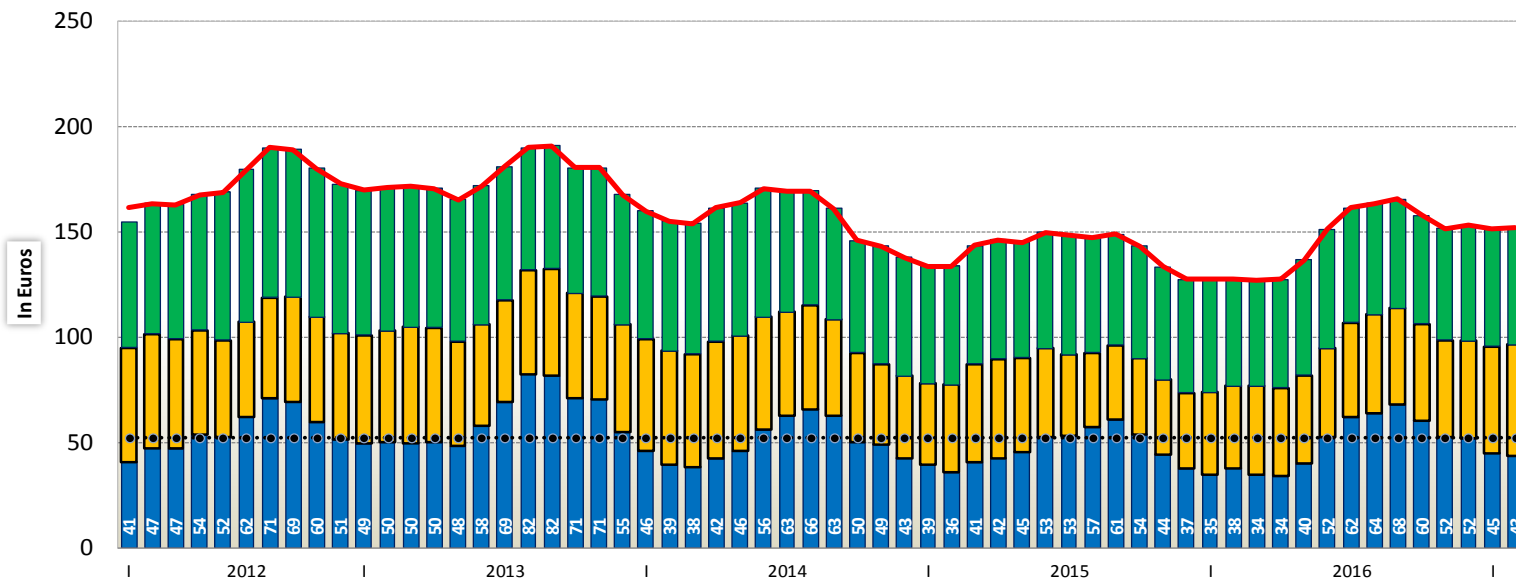
Soyameal world quotations \$/ton





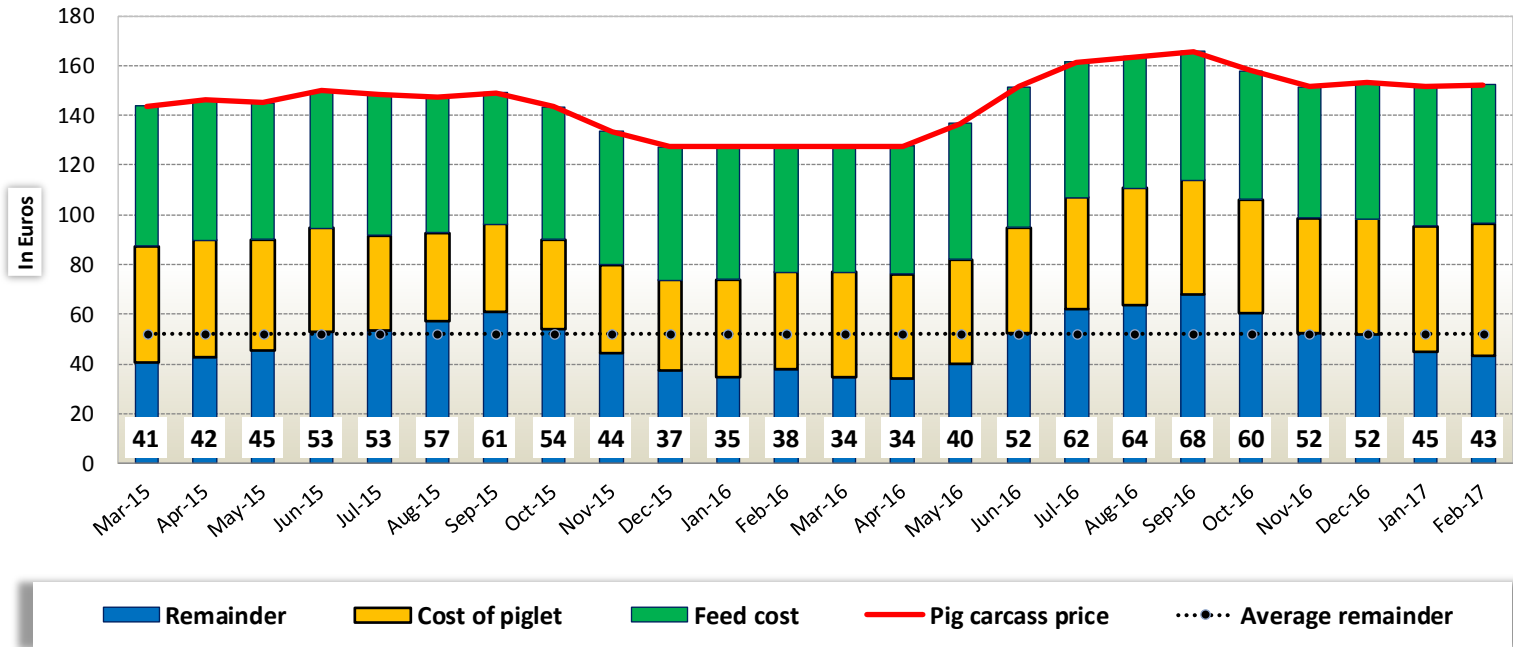
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Remainder for pig fattening





Remainder for pig fattening





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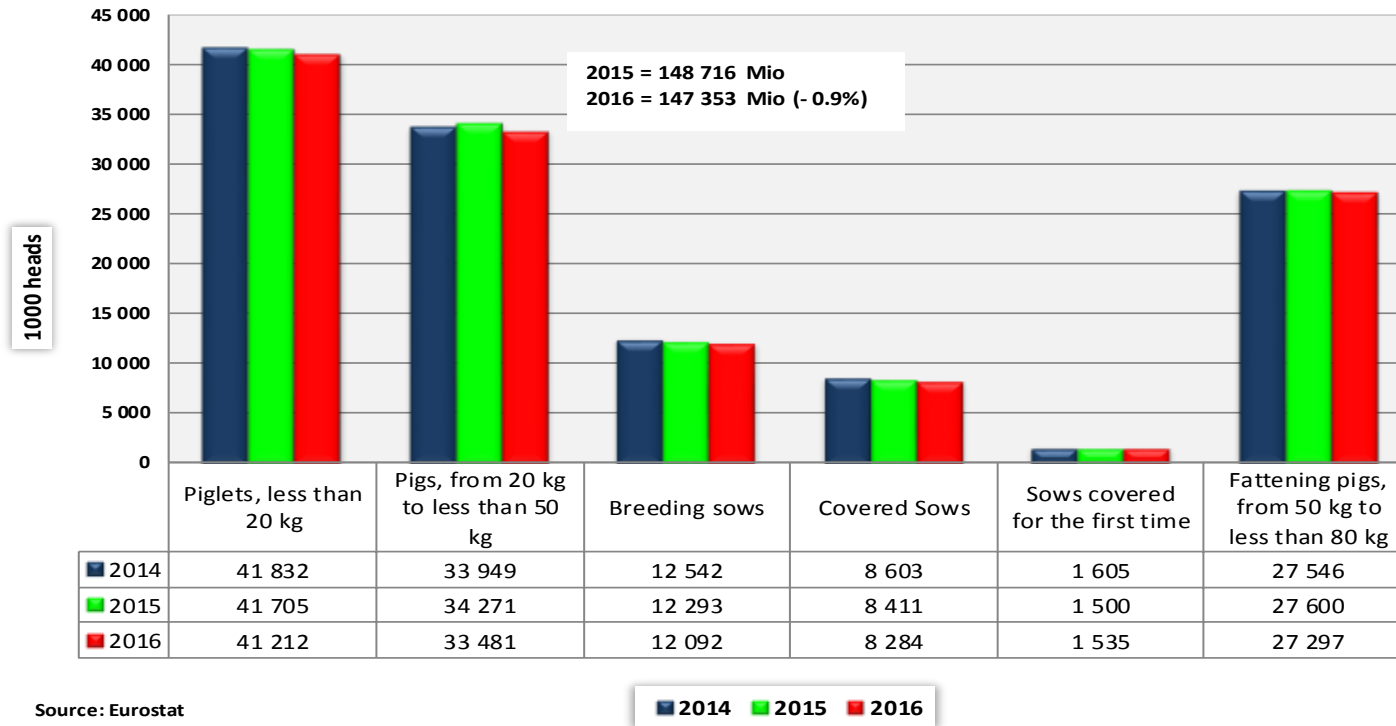


Production



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Pig population Livestock survey December 2016





LIVESTOCK SURVEY DECEMBER 2016

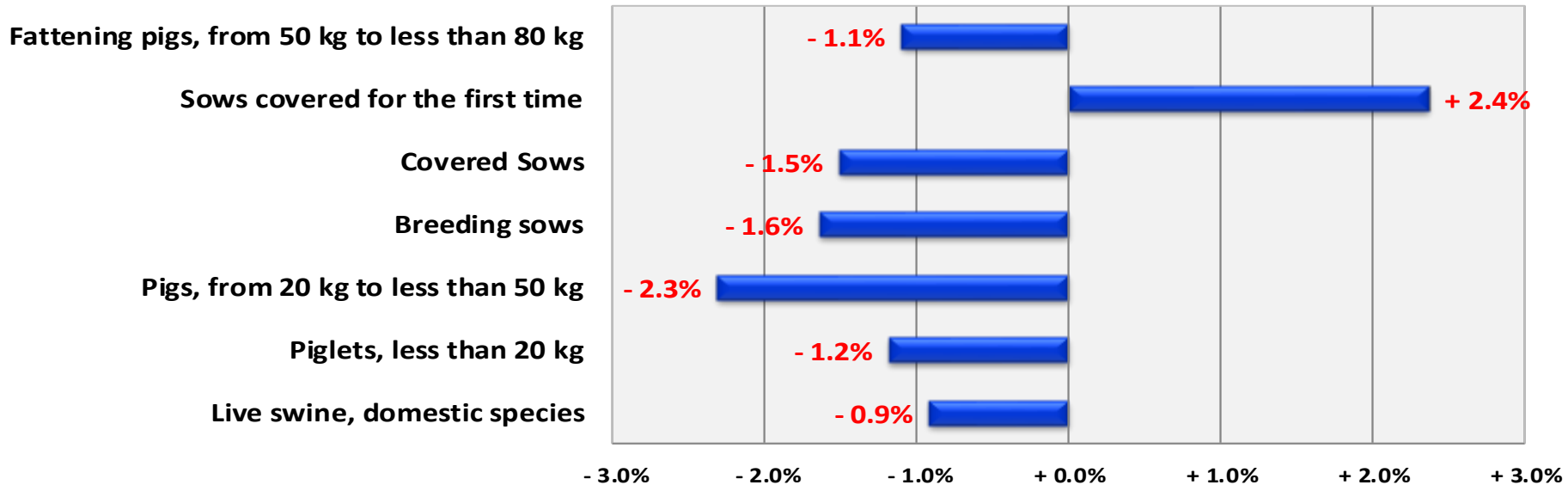
('000 heads)

	Live swine, domestic species	Piglets, less than 20 kg	Pigs, from 20 kg to less than 50 kg	Breeding sows	Covered Sows	Sows covered for the first time	Fattening pigs, from 50 kg to less than 80 kg
2012							
2013	146 242	40 828	32 822	12 511	8 540	1 583	27 740
2014	148 331	41 832	33 949	12 542	8 603	1 605	27 546
2015	148 716	41 705	34 271	12 293	8 411	1 500	27 600
2016	147 353	41 212	33 481	12 092	8 284	1 535	27 297
2015/2014	+ 0.3%	- 0.3%	+ 0.9%	- 2.0%	- 2.2%	- 6.5%	+ 0.2%
2016/2015	- 0.9%	- 1.2%	- 2.3%	- 1.6%	- 1.5%	+ 2.4%	- 1.1%



Change in pig population

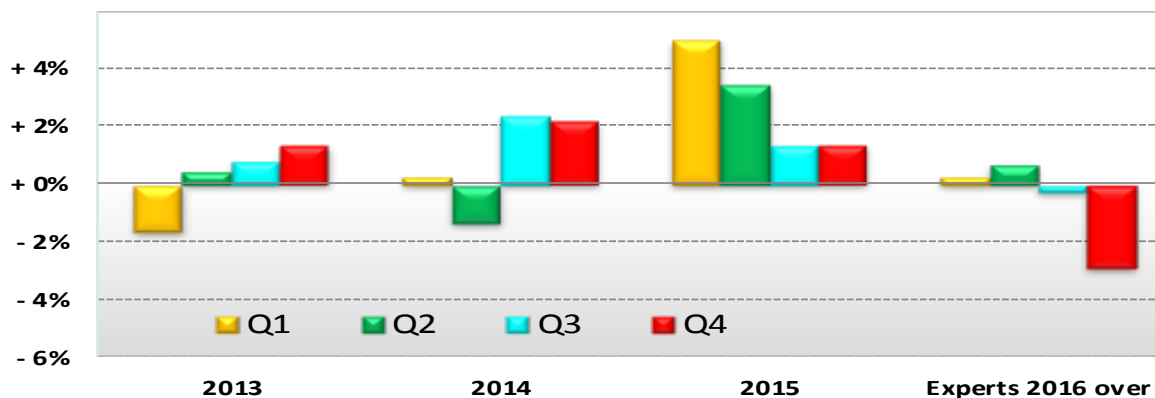
Livestock survey December 2016 compared to December 2015



Source: Eurostat



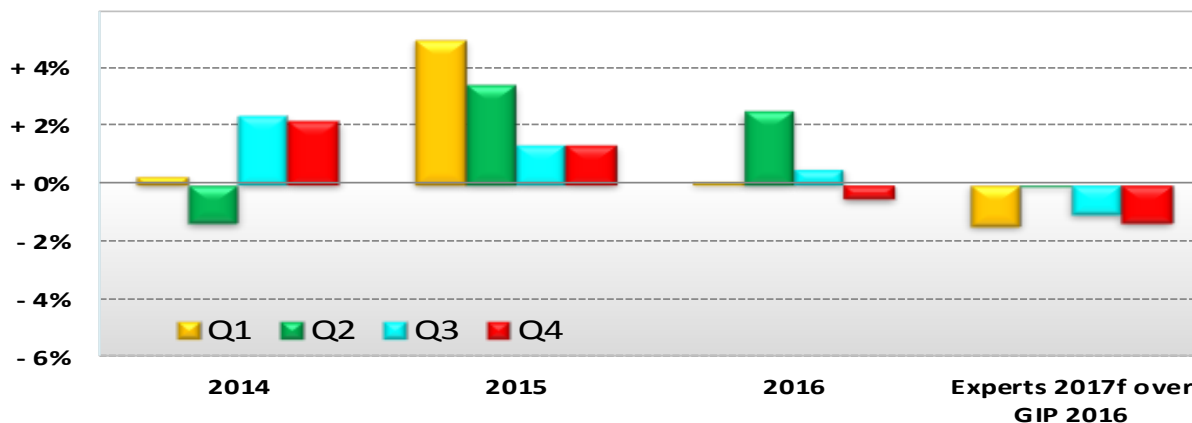
Change in EU pigmeat slaughter (2016 forecast based on GIP and experts estimations)



				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%	- 0.5%	- 2.9%
EU_28	+ 0.2%	+ 0.9%	+ 2.7%	+ 0.6%	- 0.6%



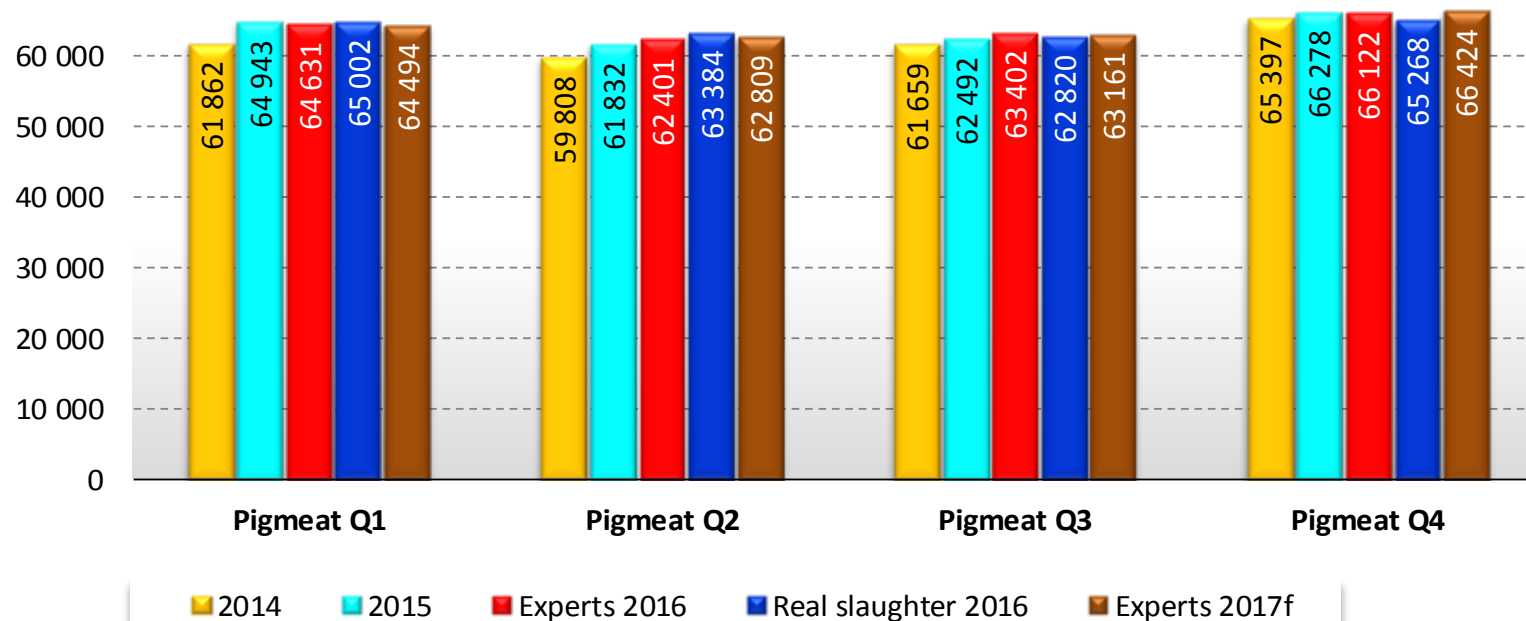
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Q3	+ 2.3%	+ 1.3%	+ 0.5%		- 1.0%
Q4	+ 2.2%	+ 1.3%	- 0.5%		- 1.3%
EU_28	+ 0.9%	+ 2.7%	+ 0.6%		- 1.0%



**EU pigmeat slaughter (2016 forecast based on GIP and experts estimations)
('000 heads)**



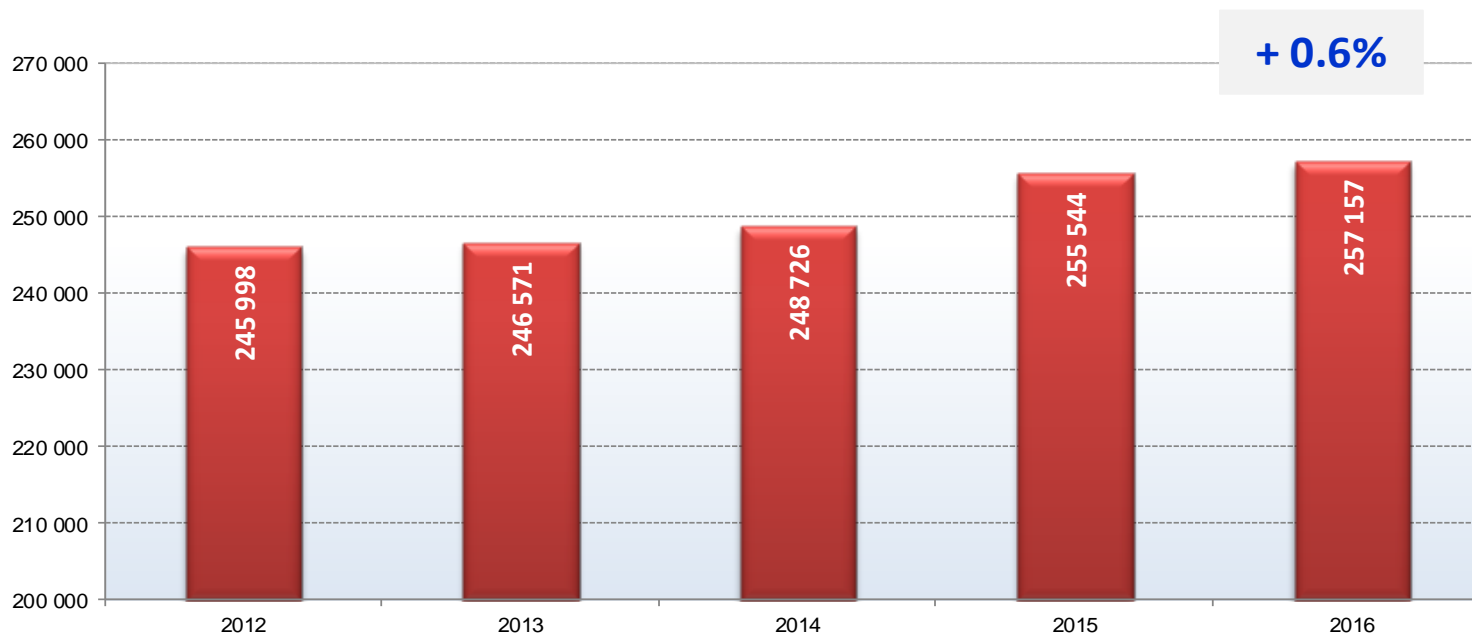


2017

	REAL SLAUGHTER by year				(In 1000 heads)		
					Experts 2017f	Real slaughter 2017	Eurostat GIP 2016
	2013	2014	2015	2016			
Pigmeat Q1	61 689	61 862	64 943	65 002	64 494		65 422
Pigmeat Q2	60 613	59 808	61 832	63 384	62 809		62 814
Pigmeat Q3	60 252	61 659	62 492	62 820	63 161		63 817
Pigmeat Q4	64 016	65 397	66 278	65 268	66 424		67 306
EU_28	246 571	248 726	255 544	256 474	256 888		259 359
	2013	2014	2015	2016	Experts 2017f over GIP 2016	Experts 2017f over Real Slaughter 2017	
Q1	- 1.6%	+ 0.3%	+ 5.0%	+ 0.1%	- 1.4%		
Q2	+ 0.4%	- 1.3%	+ 3.4%	+ 2.5%	- 0.0%		
Q3	+ 0.8%	+ 2.3%	+ 1.3%	+ 0.5%	- 1.0%		
Q4	+ 1.3%	+ 2.2%	+ 1.3%	- 1.5%	- 1.3%		
EU_28	+ 1.3%	+ 0.9%	+ 2.7%	+ 0.4%	- 1.0%		



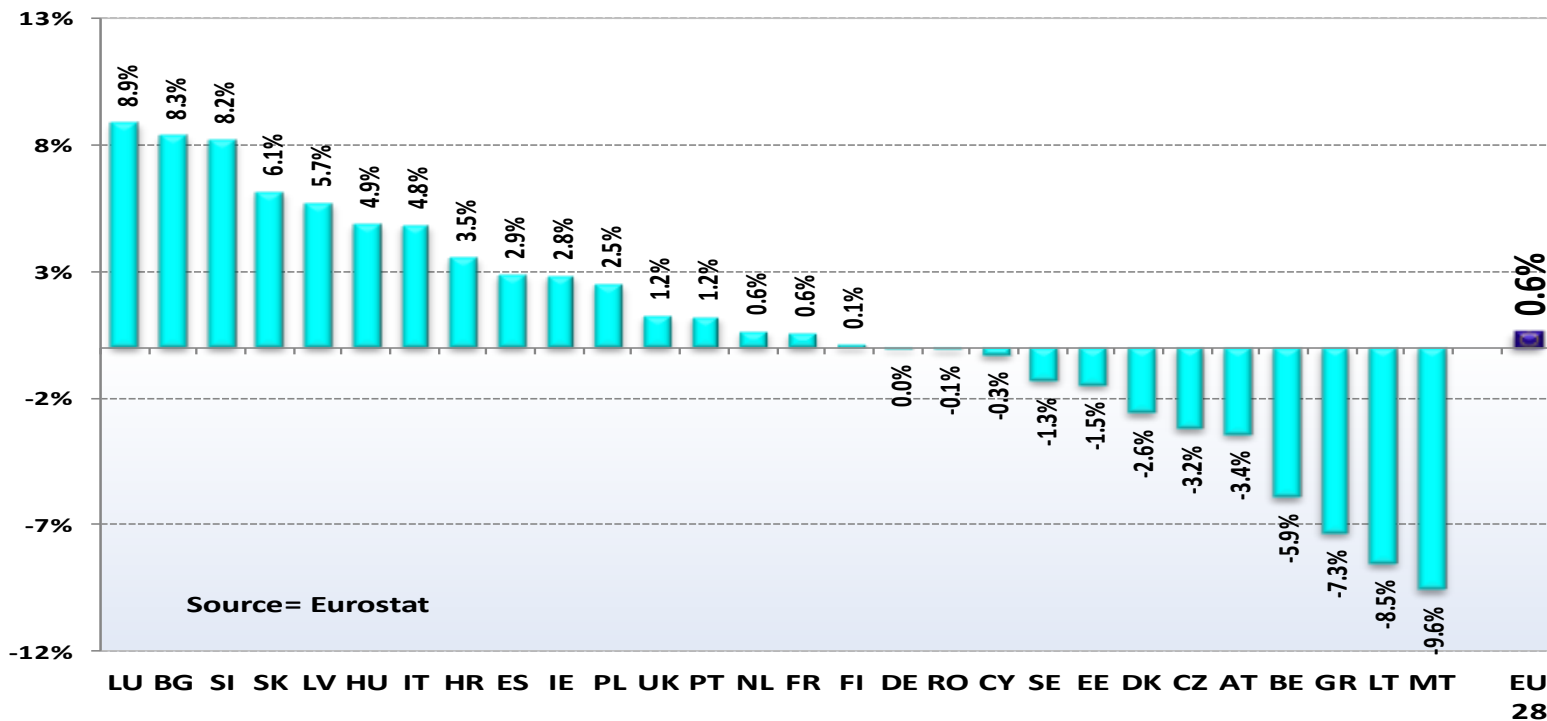
**EU pig slaughter by year
('000 heads)**



Source: Eurostat



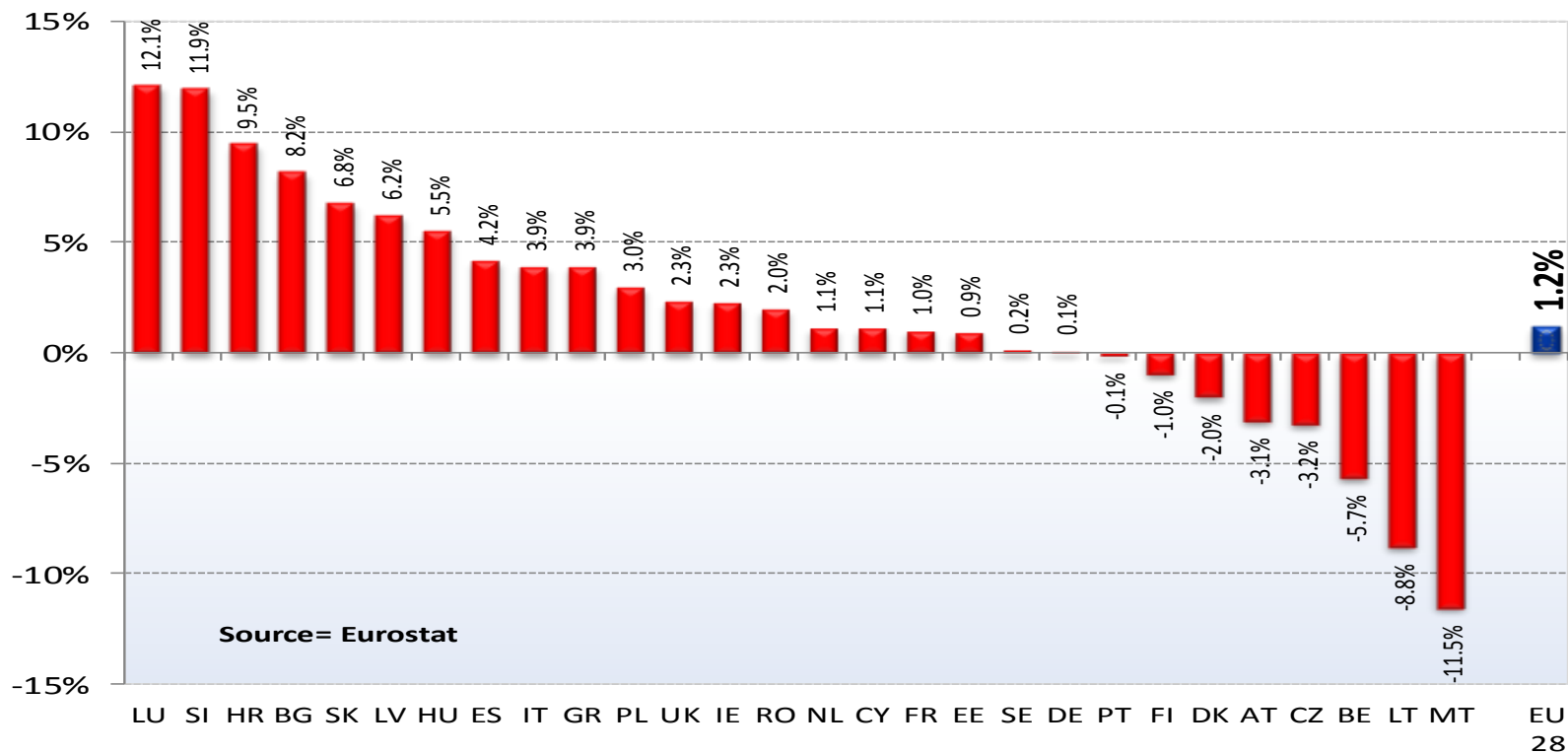
Change in Pig Slaughter ('000 heads) 2016/2015 (up to Dec)





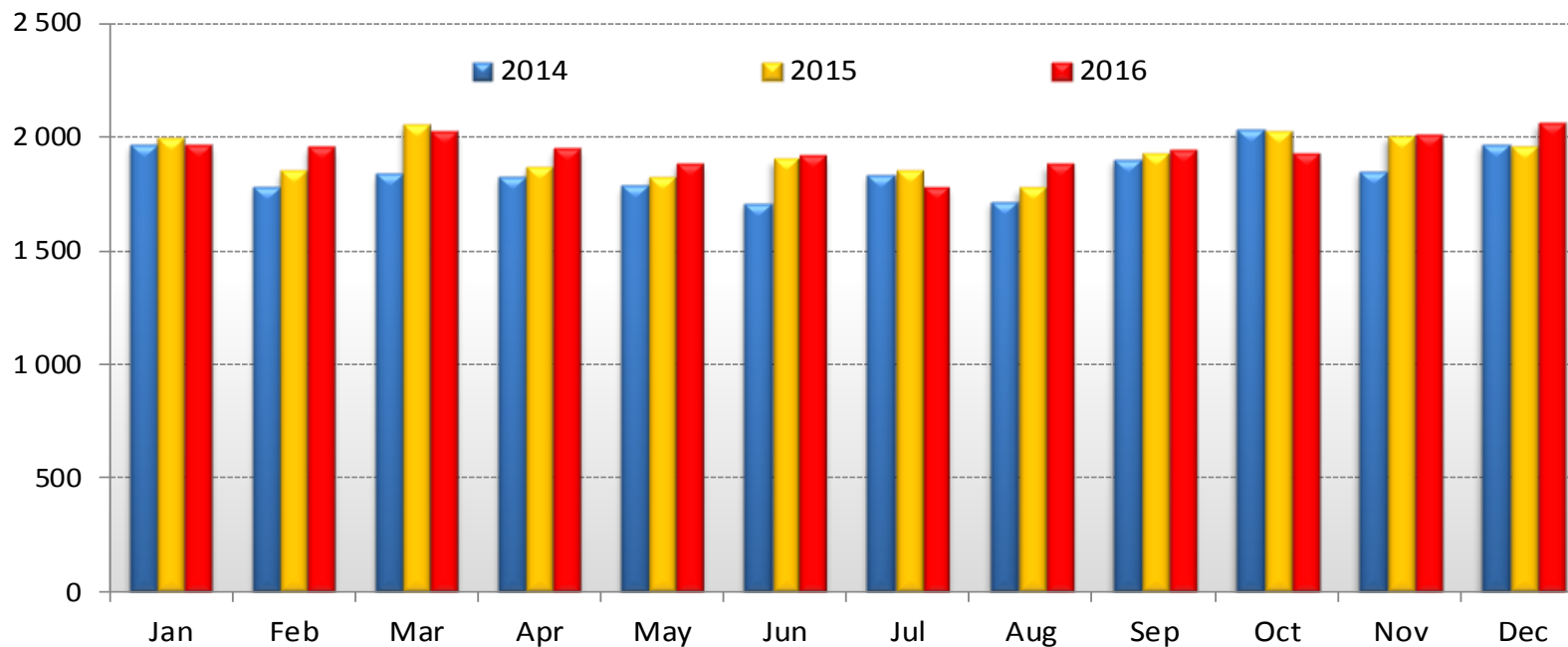
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Change in Pig Slaughter ('000 tonnes) 2016/2015 (up to Dec)





Pig Production (E28 Slaughtering) - Tonnes



Source - Estat-Newcronos



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Prices



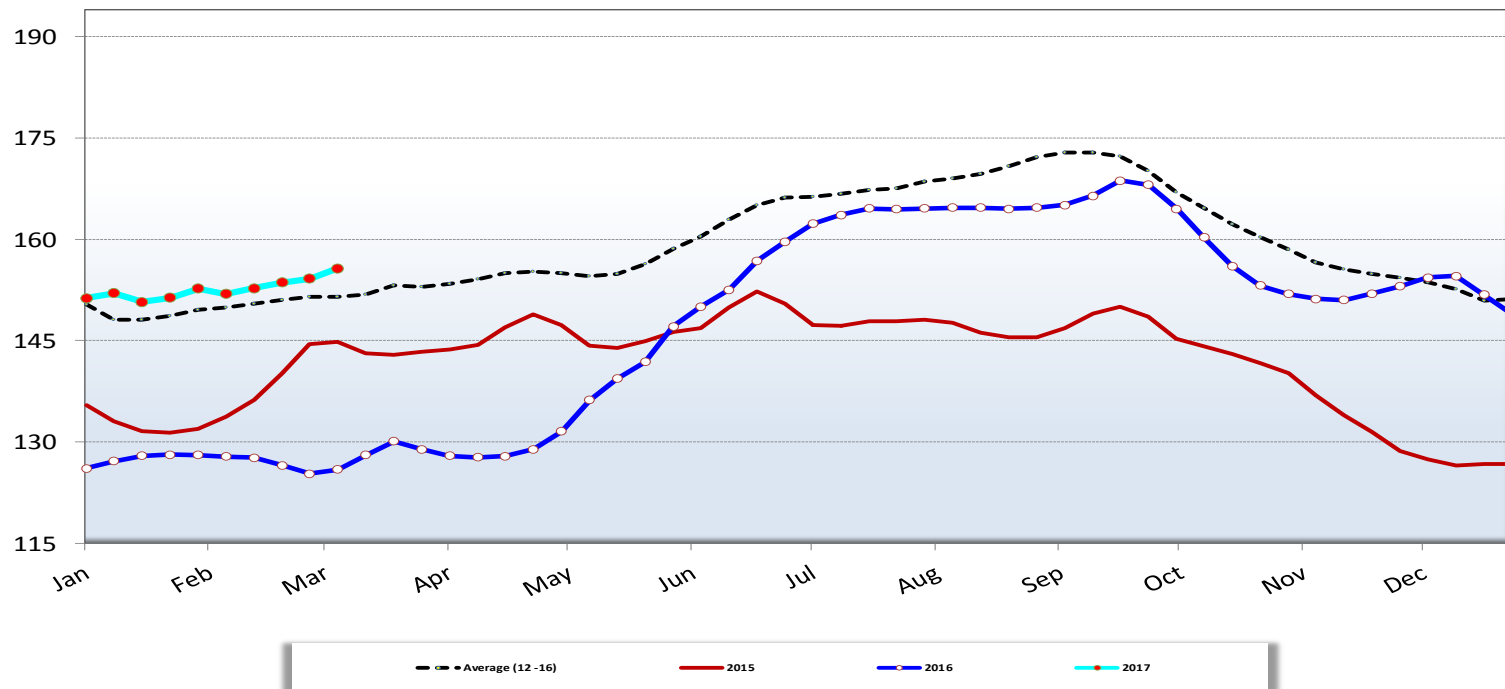
EU Prices	EU Prices	10	Evolution since last week	Evolution since last month	Evolution since last year
	Average (S-E)	155.7	+ 1.0%	+ 2.5%	+ 23.6%
	Class S	156.4	+ 1.0%	+ 3.0%	+ 23.9%
	Class E	154.4	+ 1.0%	+ 1.7%	+ 23.2%
	Piglet	54.8	+ 1.1%	+ 3.0%	+ 38.0%

€/100 kg carcass weight

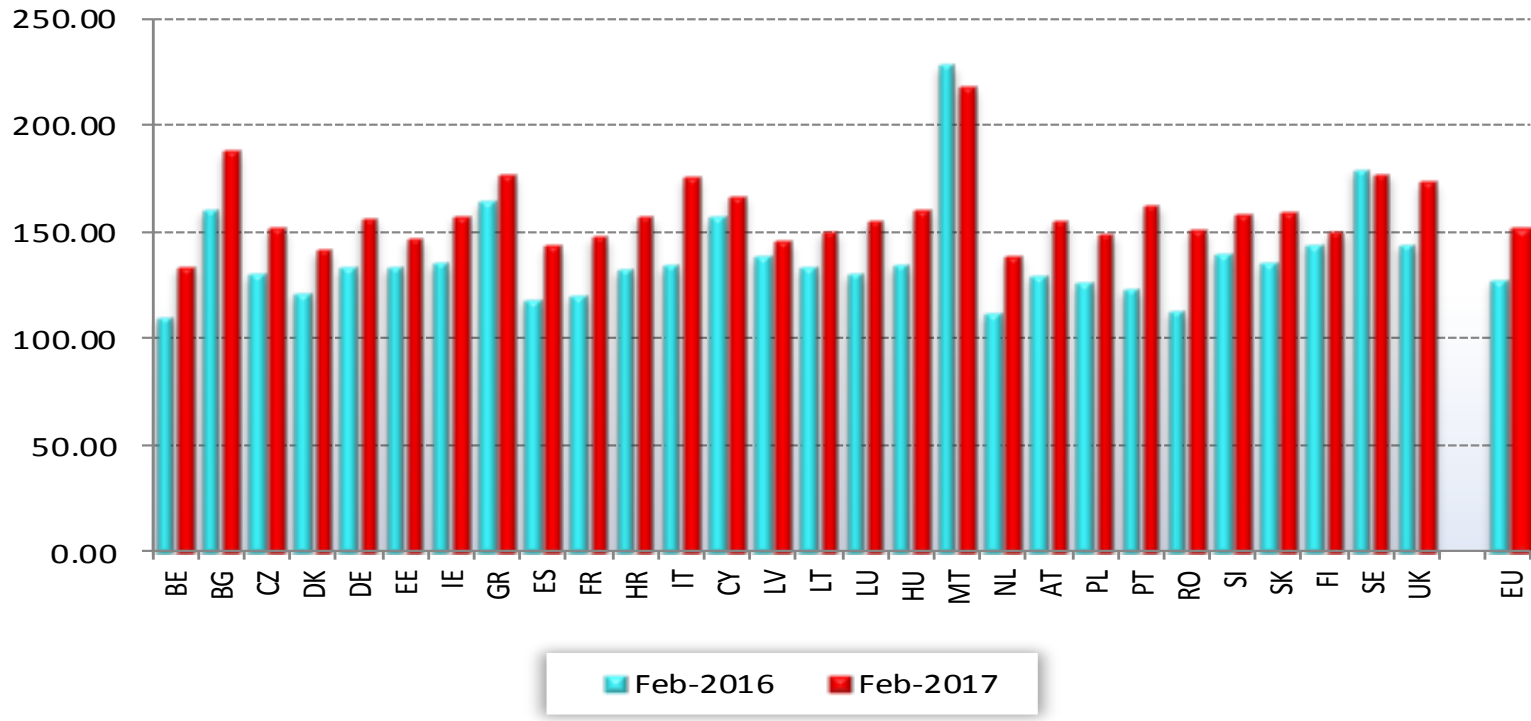
€/head

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

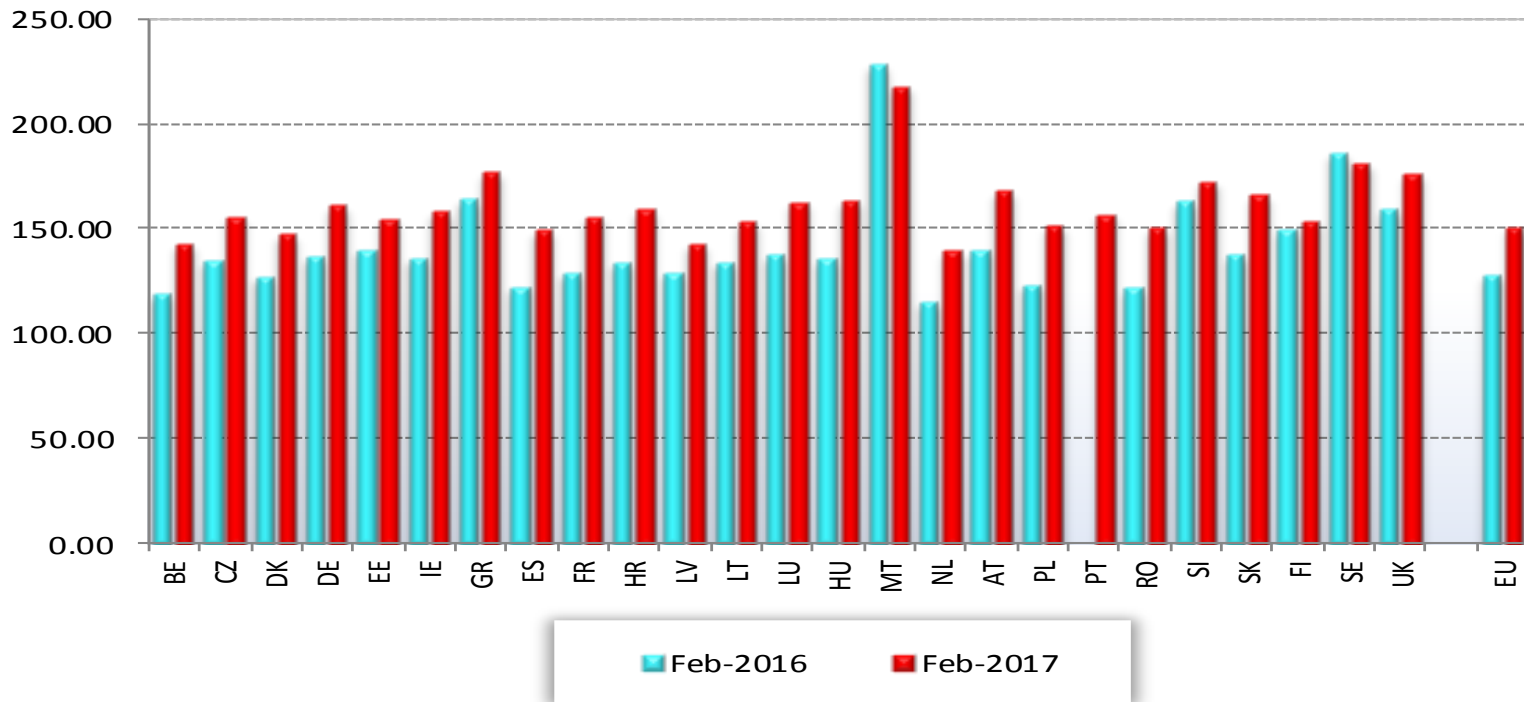
Latest price (Week 10) : 155.67 EUR/100 kg/cw



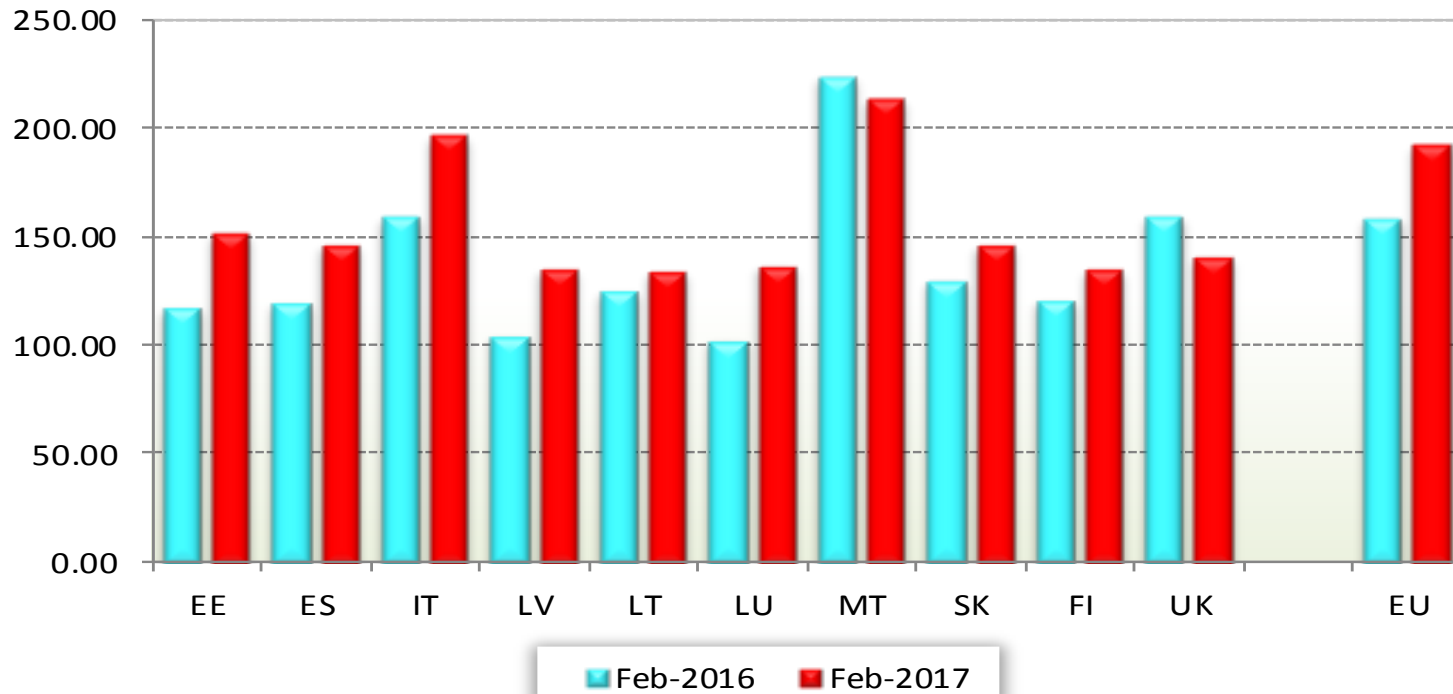
Class E (monthly prices) (€/100 kg)



Class S (monthly prices) (€/100 kg)



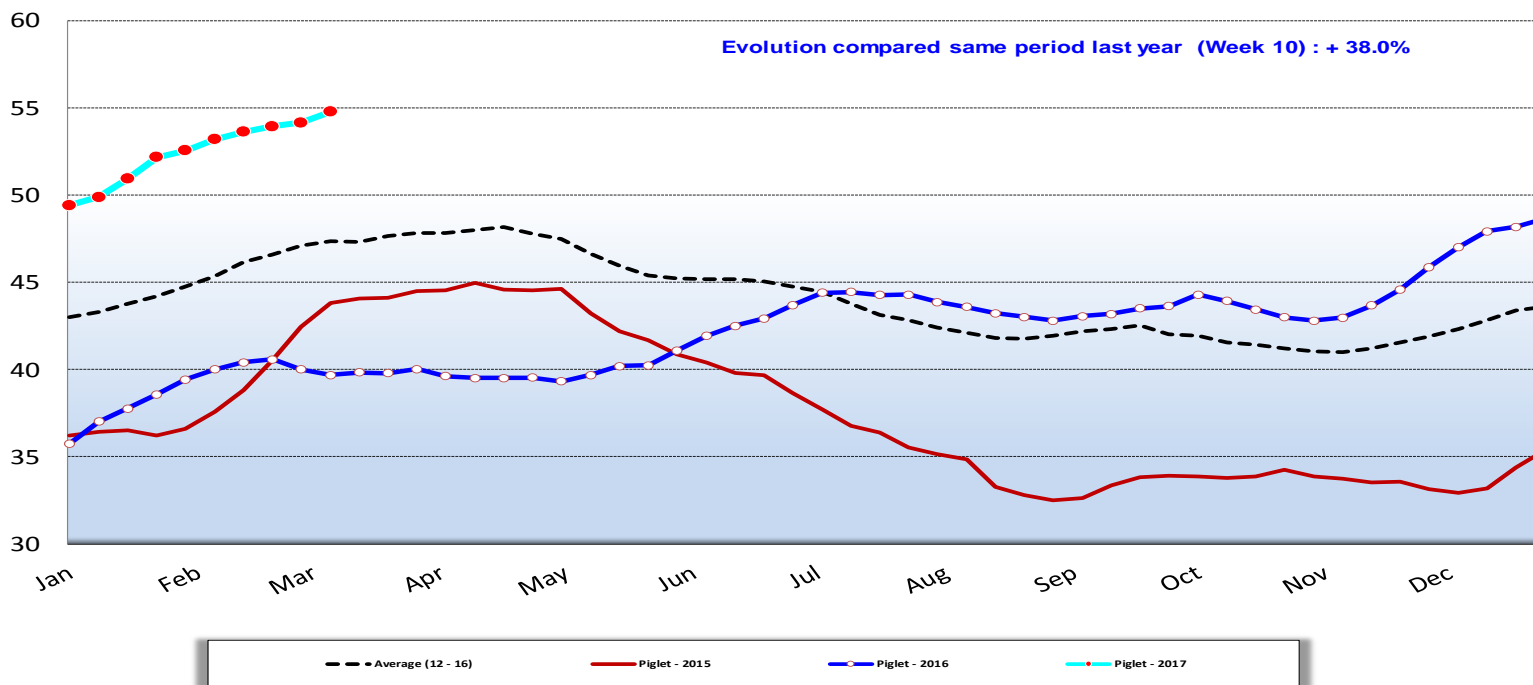
Class R (monthly prices) (€/100 kg)





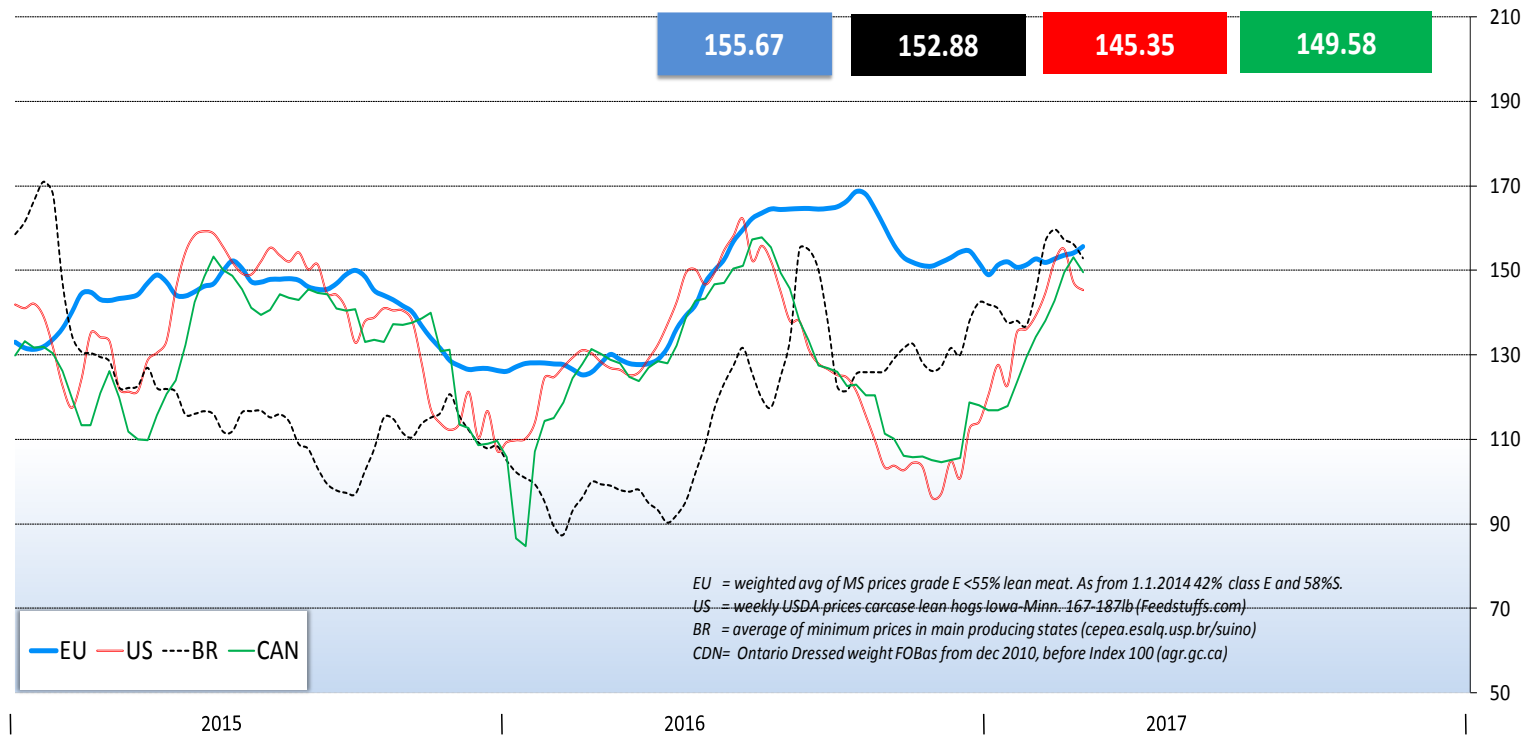
EU evolution of the EU average piglet prices (€/head)

Latest price (Week 10) : 54.76 EUR/head

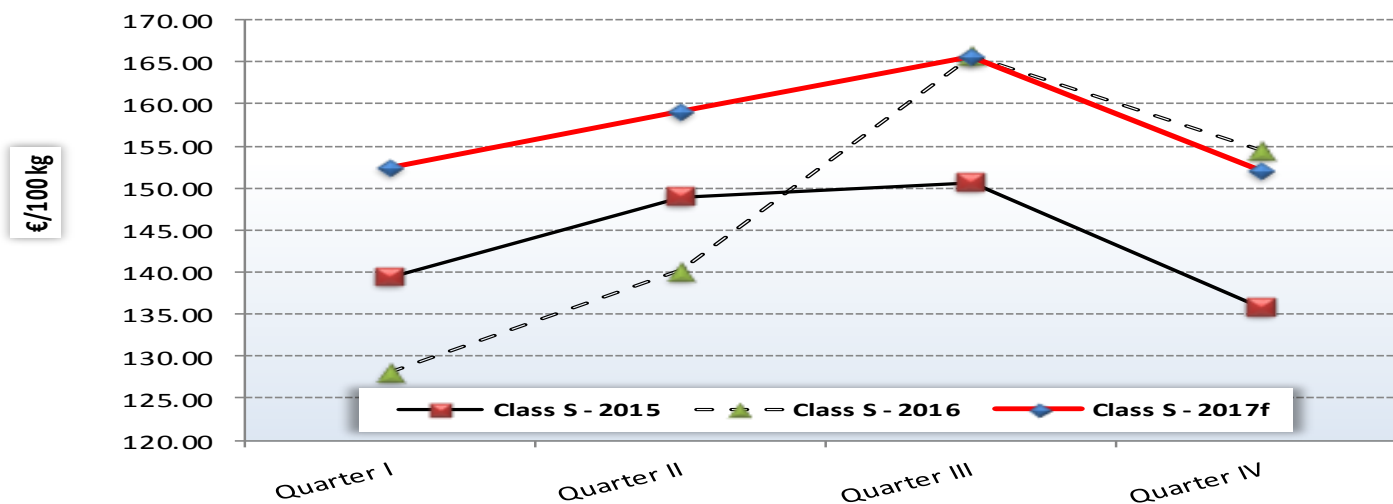




World weekly average Pig prices 2015 - 2017 in Euro/ 100kg carcass (EU, Brazil, Canada and USA)

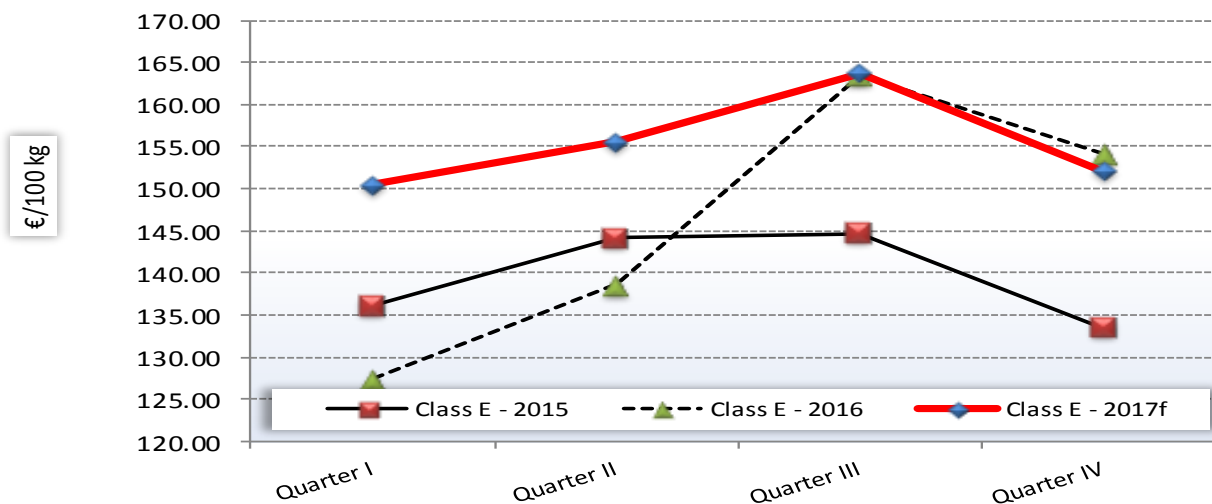


**Development of the EU average price
for pig carcasses - Class S**



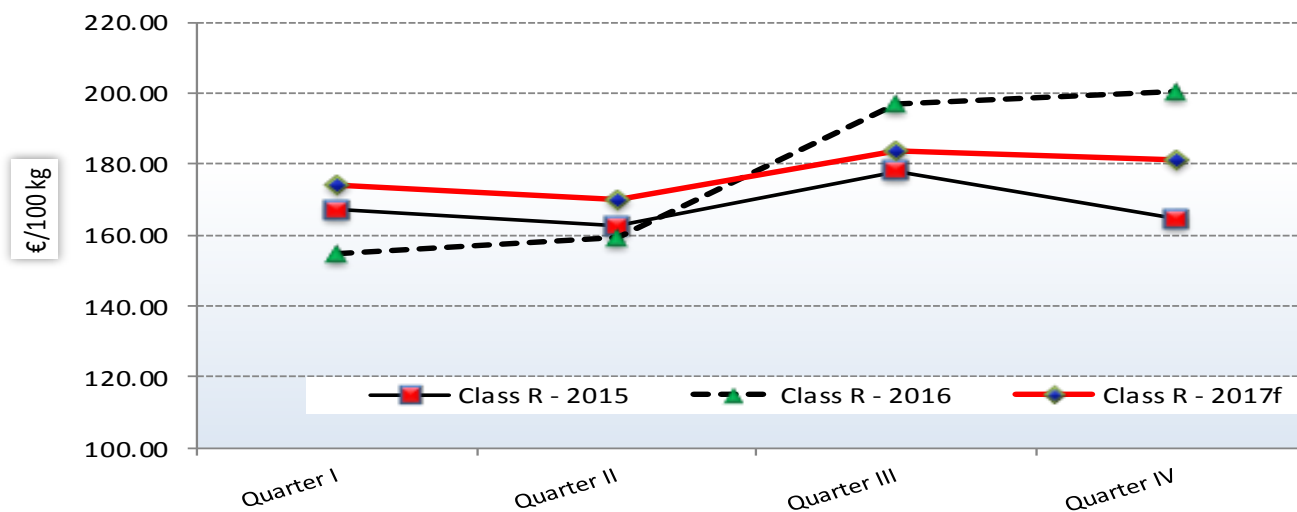
	Quarter I	Quarter II	Quarter III	Quarter IV
Class S - 2015	139.41	148.96	150.71	135.73
Class S - 2016	128.13	140.26	165.72	154.48
Class S - 2017f	152.51	159.19	165.64	151.98

Development of the EU average price for pig carcasses - **Class E**



	Quarter I	Quarter II	Quarter III	Quarter IV
Class E - 2015	136.10	144.17	144.63	133.42
Class E - 2016	127.47	138.61	163.55	154.22
Class E - 2017f	150.49	155.60	163.68	152.11

**Development of the EU average price
for pig carcasses - Class R**



	Quarter I	Quarter II	Quarter III	Quarter IV
Class R - 2015	167.08	162.43	177.90	164.46
Class R - 2016	154.53	159.55	196.71	200.29
Class R - 2017f	174.12	169.74	183.79	180.96



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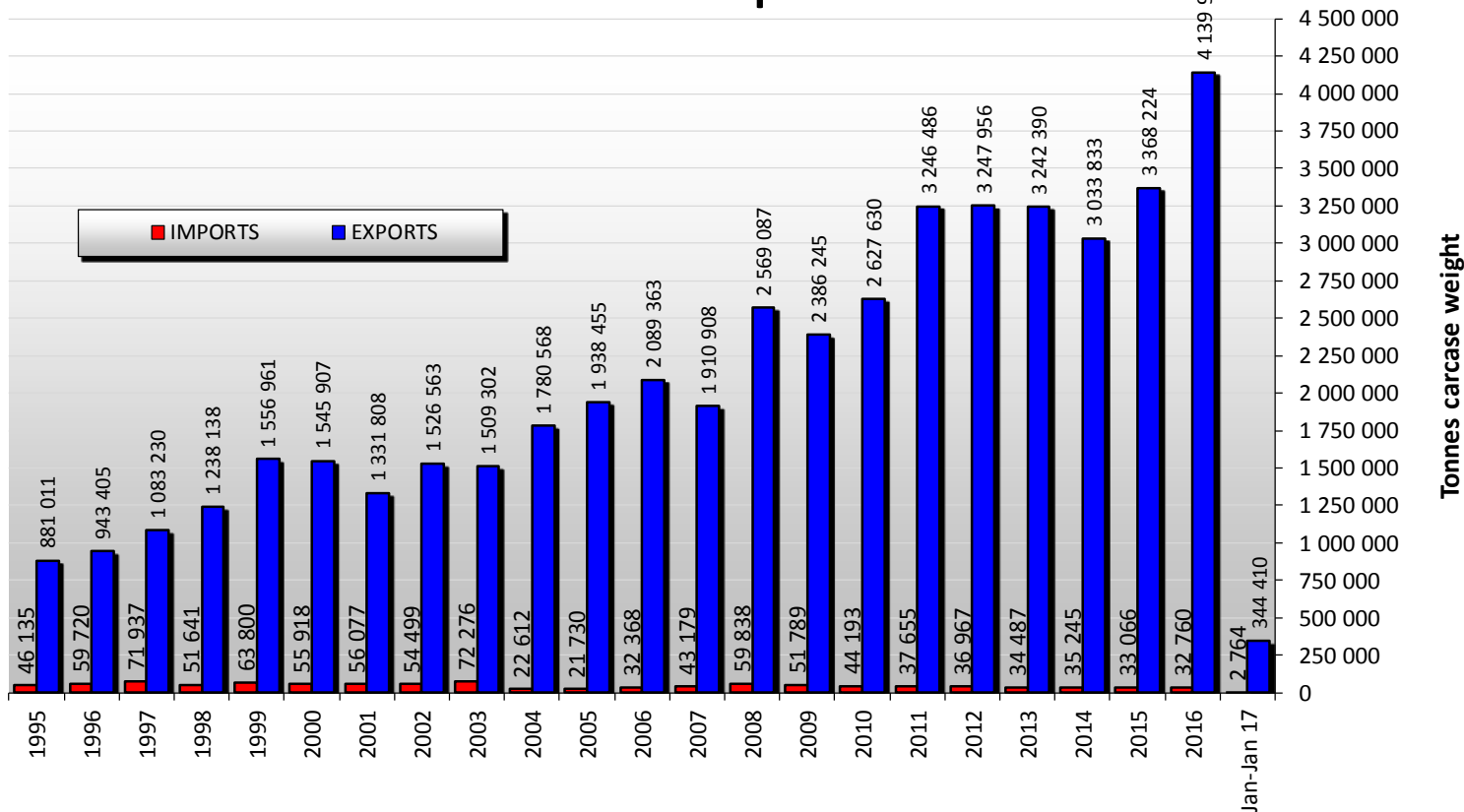


Trade



EU trade of PIG products

EU Trade of PIG products





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

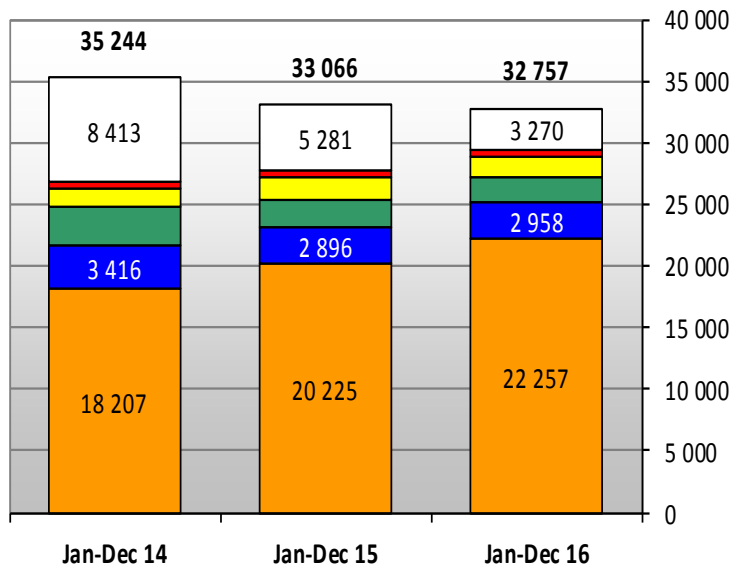
IMPORT

	2012		2013		2014		2015		Jan-Dec 16		Compared to Jan-Dec 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Switzerland	18 731	51%	17 399	50%	18 207	52%	20 225	61%	22 257	68%	10%
Chile	8 756	24%	6 432	19%	3 416	10%	2 896	9%	2 958	9%	2%
Norway	2 045	6%	2 202	6%	3 192	9%	2 315	7%	1 964	6%	-15%
USA	1 264	3%	1 548	4%	1 498	4%	1 769	5%	1 711	5%	-3%
Other	6 171	17%	6 906	20%	8 932	25%	5 862	18%	3 868	12%	
Extra-EU	36 967		34 487		35 245		33 066		32 757		
% change			- 7%		+ 2%		- 6%		- 0.9%		



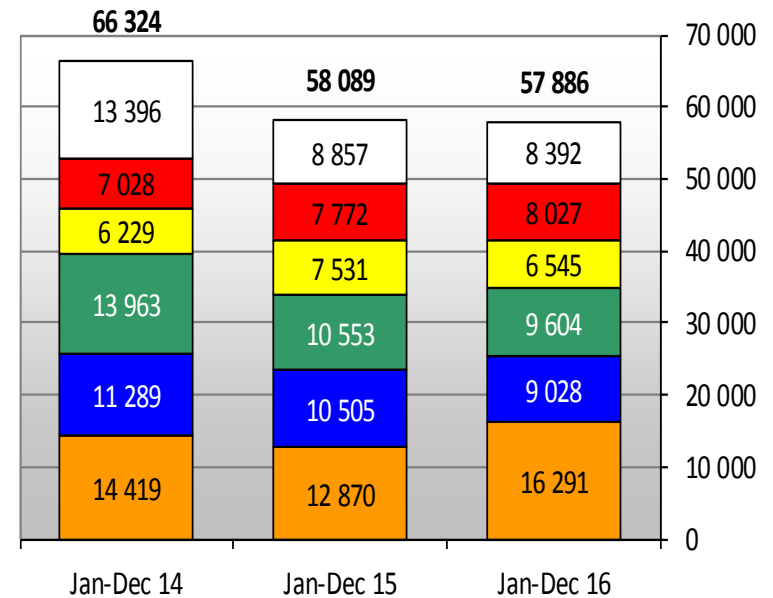
EU imports of selected PIG products Trade figures (COMEXT – tonnes carcass weight)

IMPORTS of PIG Meat into EU-28 (Tonnes c. weight)



Switzerland Chile Norway USA Thailand Other origins

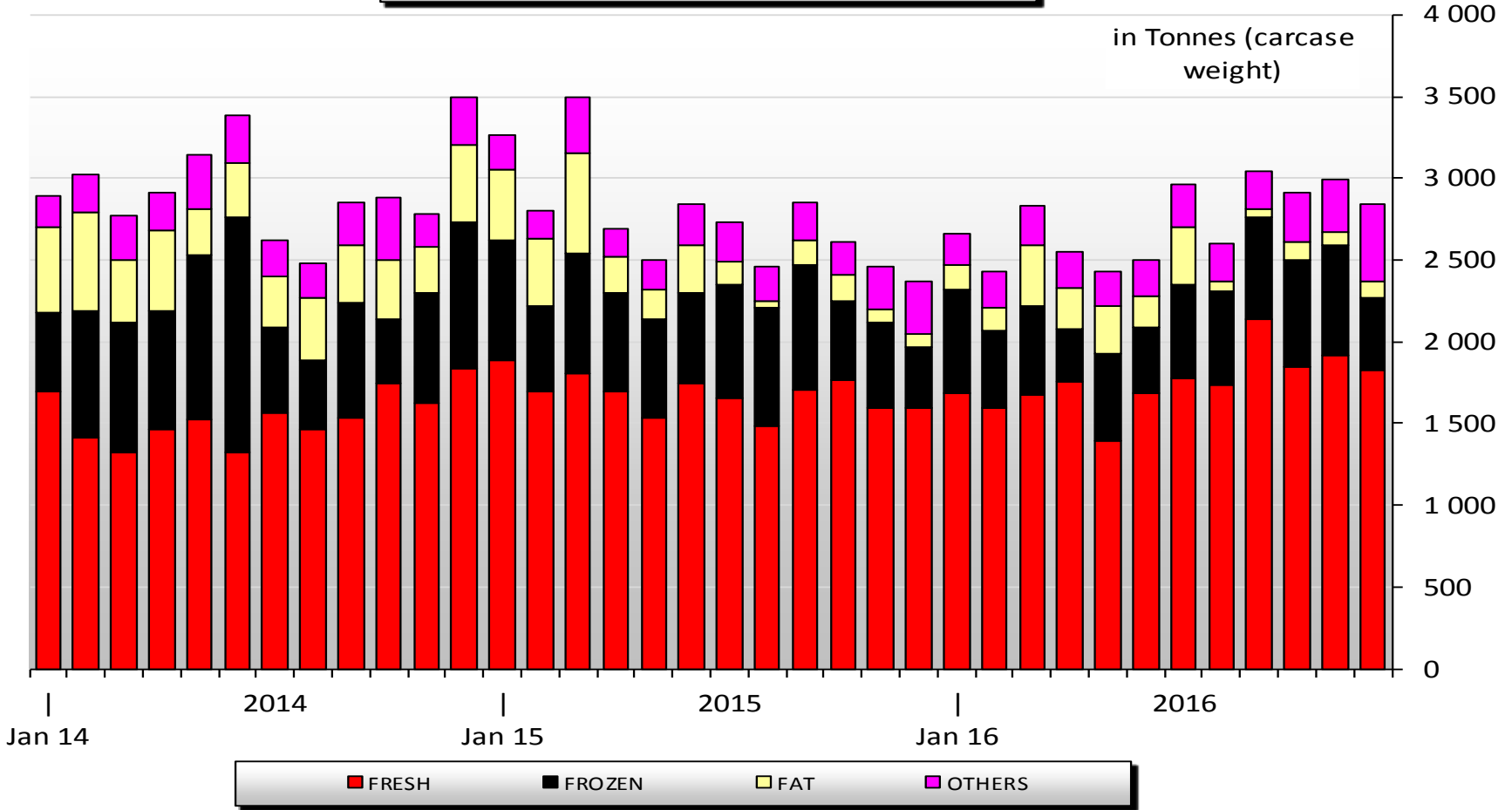
IMPORTS of PIG Meat into EU-28 (1000 EUR)



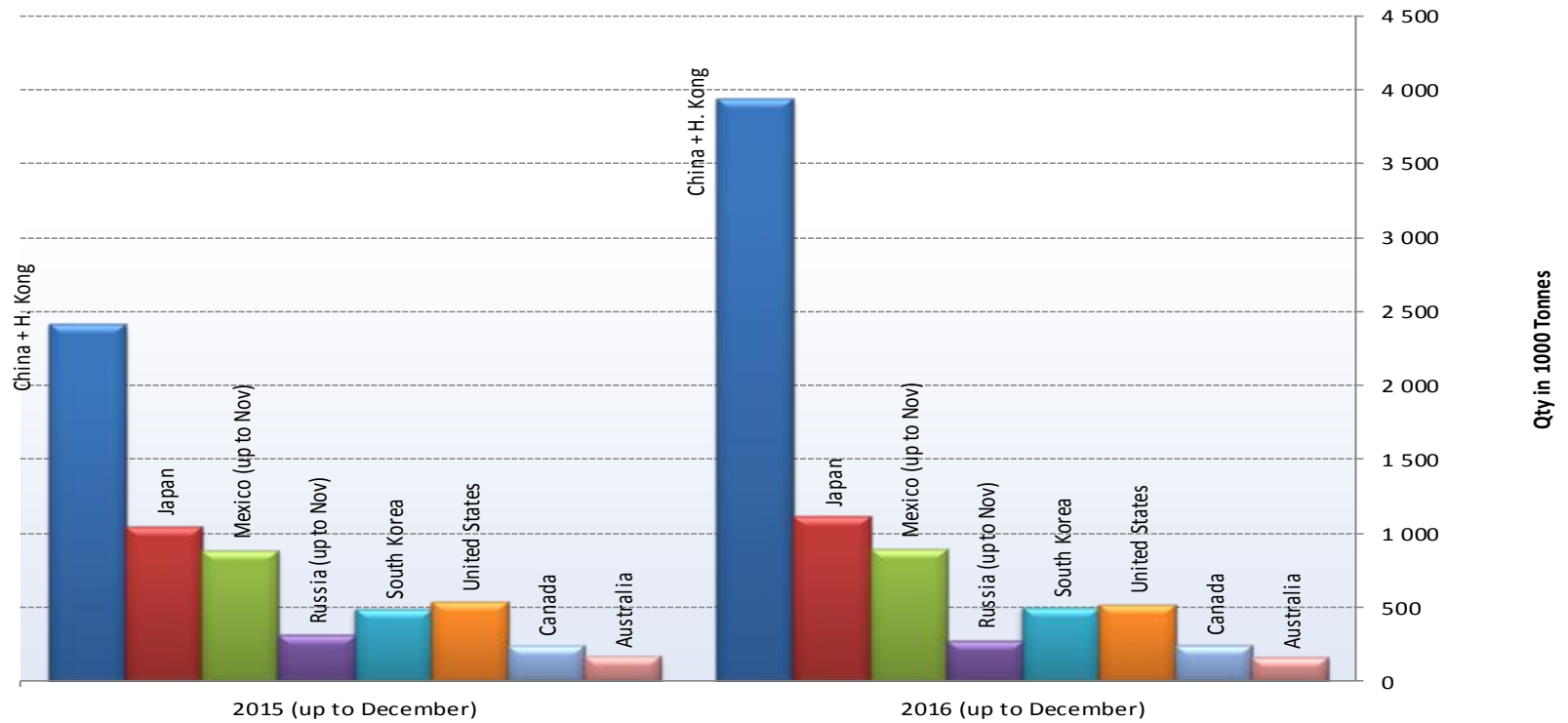
Switzerland Chile Norway USA Thailand Other origins



Imports of selected PIG products



Main Importers of PIG Products (up to December)



Source : GTA

Excl. Live animals

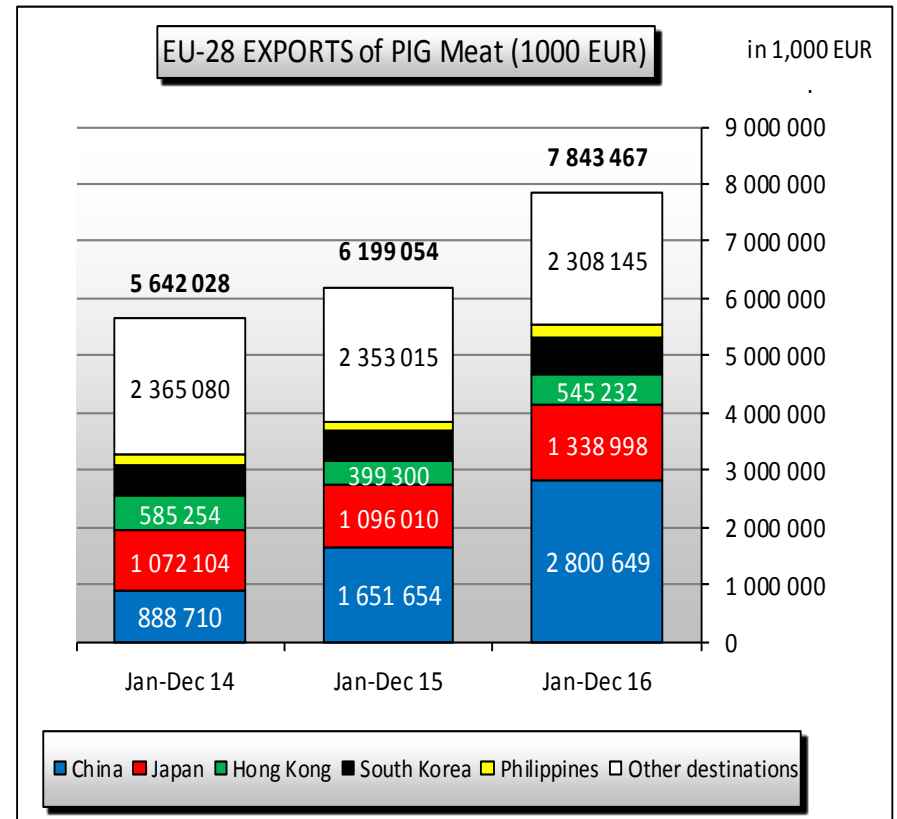
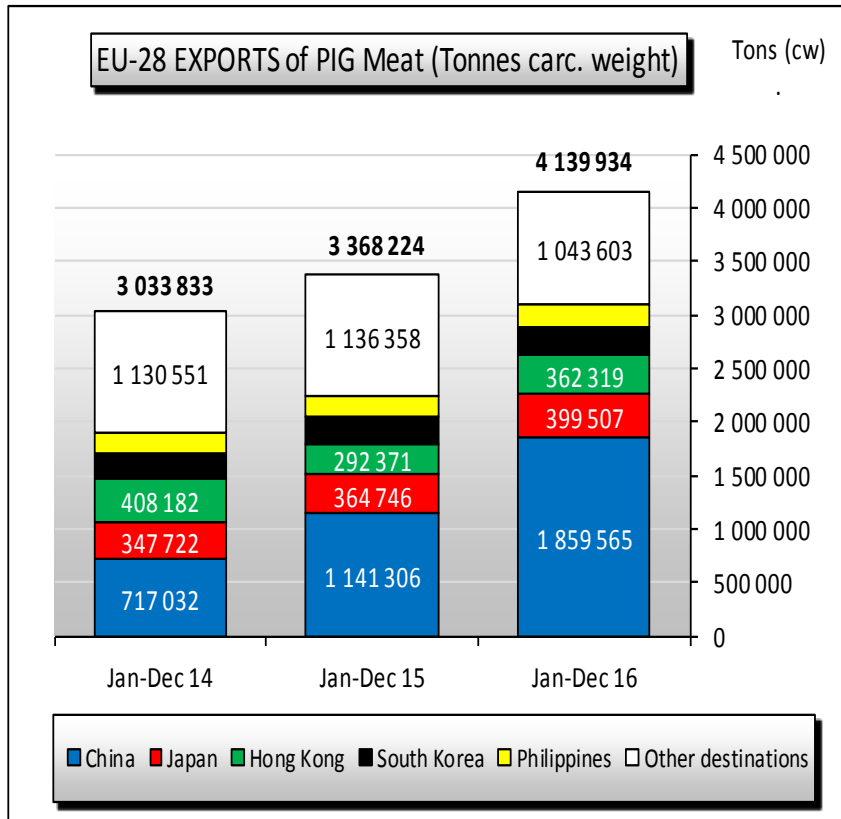


EU exports of selected PIG products: Trade figures (COMEXT – tonnes carcass weight)

	2012		2013		2014		2015		Jan-Dec 16		Compared to Jan-Dec 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
China	589 805	18.2%	668 386	20.6%	717 033	23.6%	1 141 306	33.9%	1 859 565	44.9%	+ 63%
Japan	259 997	8.0%	261 324	8.1%	347 721	11.5%	364 746	10.8%	399 507	9.7%	+ 10%
Hong Kong	381 703	11.8%	388 049	12.0%	408 183	13.5%	292 372	8.7%	362 319	8.8%	+ 24%
South Korea	145 950	4.5%	108 482	3.3%	227 825	7.5%	241 568	7.2%	259 244	6.3%	+ 7%
Philippines	74 140	2.3%	102 348	3.2%	202 522	6.7%	191 876	5.7%	215 696	5.2%	+ 12%
USA	65 116	2.0%	64 710	2.0%	90 985	3.0%	105 123	3.1%	116 215	2.8%	+ 11%
Australia	54 262	1.7%	51 467	1.6%	73 156	2.4%	102 645	3.0%	99 829	2.4%	- 3%
Ukraine	167 129	5.1%	125 540	3.9%	106 780	3.5%	96 631	2.9%	75 782	1.8%	- 22%
Vietnam	1 369	0.0%	3 269	0.1%	16 056	0.5%	38 290	1.1%	53 559	1.3%	+ 40%
Taiwan	15 681	0.5%	11 540	0.4%	52 970	1.7%	53 701	1.6%	47 889	1.2%	- 11%
Serbia	21 679	0.7%	28 336	0.9%	62 905	2.1%	47 488	1.4%	41 200	1.0%	- 13%
Singapore	35 369	1.1%	28 828	0.9%	40 265	1.3%	40 937	1.2%	39 976	1.0%	- 2%
Other	1 435 753	44.2%	1 400 111	14.5%	687 432	13.7%	651 541	14.4%	569 153	13.7%	
Extra-EU	3 247 956		3 242 390		3 033 833		3 368 224		4 139 934		
% change			- 0%		- 6%		+ 11%		+ 22.9%		



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



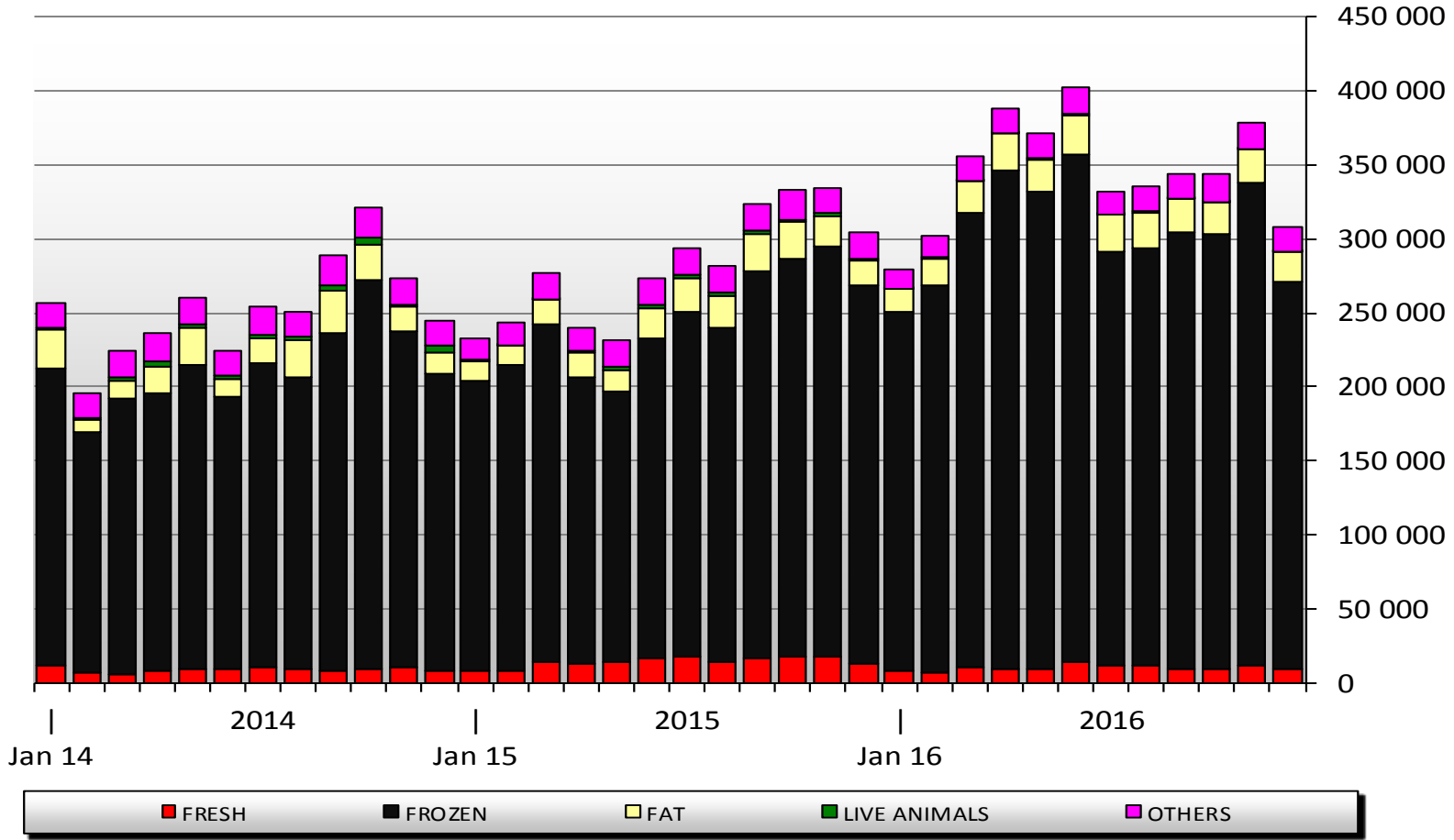
Information – South Korea applying agricultural safeguard clause

- **South Korea** has the possibility to apply **the agricultural safeguard clause** as provided by **Article 3.6 of the EU South Korea Free Trade Agreement** in the form of a higher import duty on an originating agricultural good listed in its Schedule in Annex 3 if the aggregate volume of imports of that good in any year exceed a trigger volume set out in the same Annex;
- South Korea notified the EU that as of **20 February 2017** the agricultural safeguard clause is applied;
- The concerned tariff lines are (HSK 2017): **0203-19-1000 and 0203-19-9000, chilled pork meat**;
- Trigger level: **176 000 tonnes**, exceeded already on 17 January 2017;
- The tariff will rise from 10,2% to **22,5%** - this concerns 5th FTA year (1 July 2016 – 30 June 2017).



EU Exports of selected PIG products

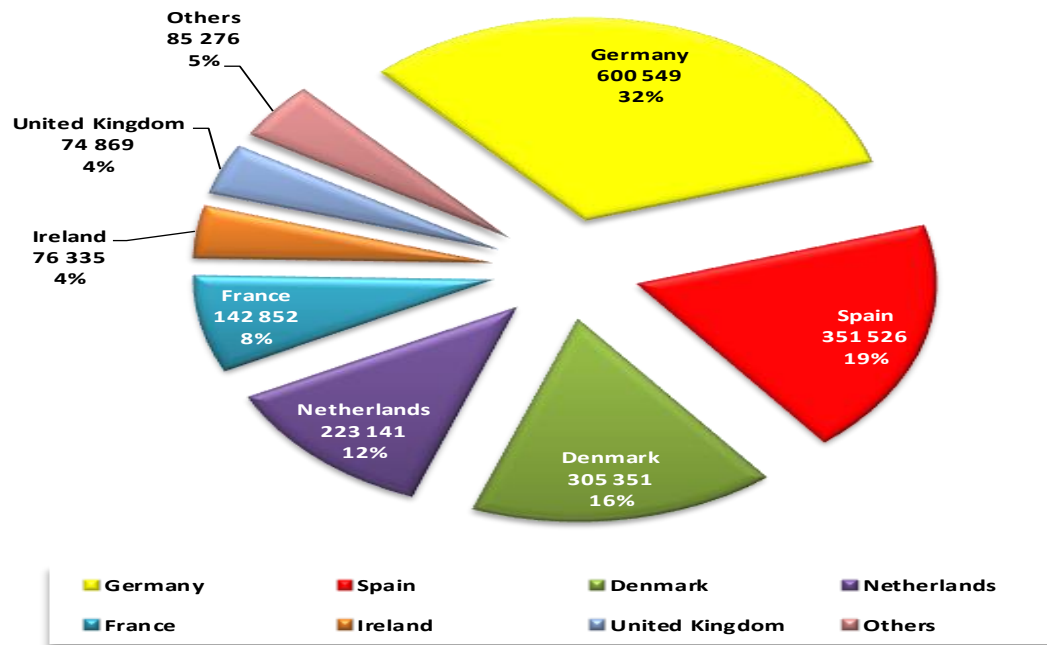
in Tonnes
(carcase weight)



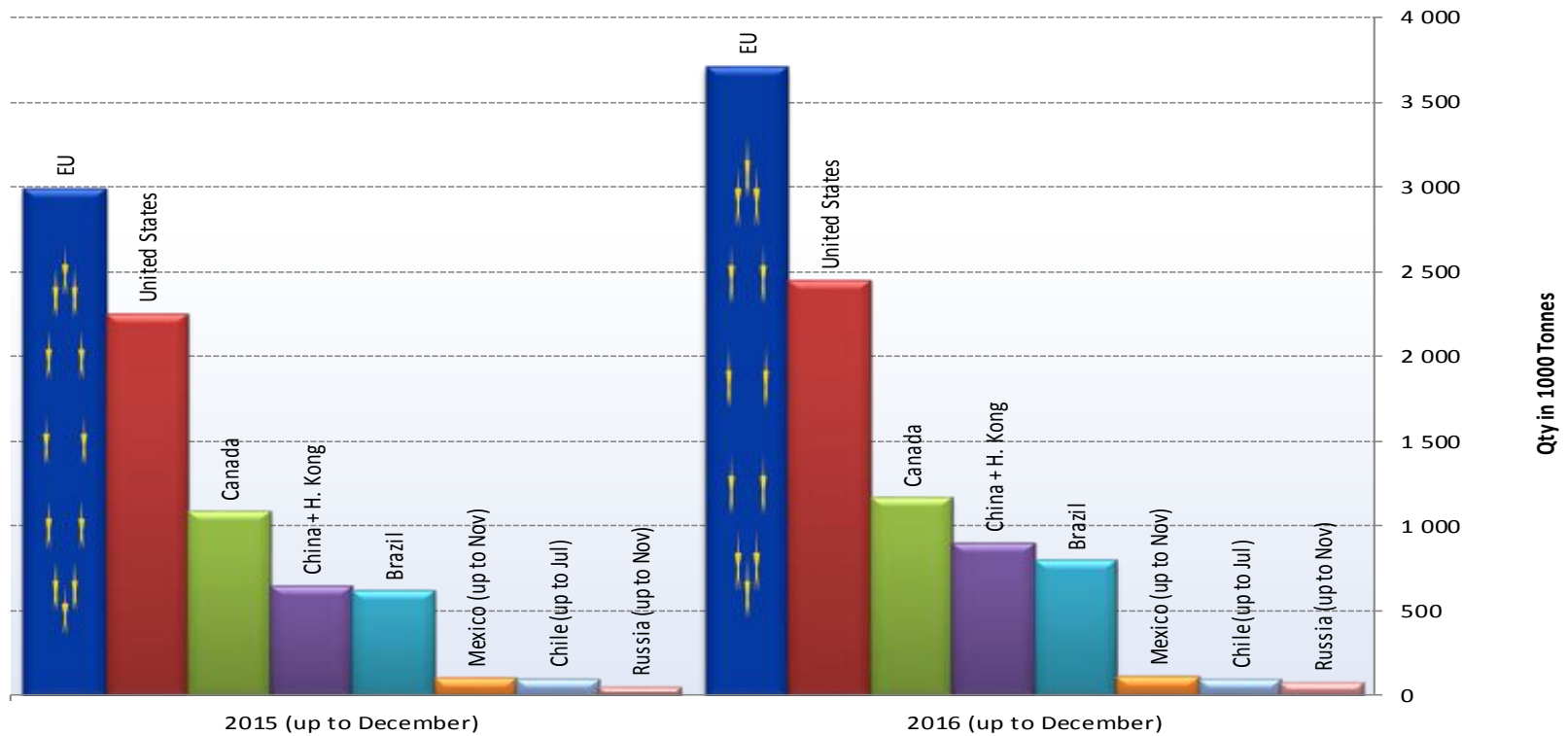


Full year 2016

Main EU MS exporting pigmeat to China (In tonnes CW)



Main Exporters of PIG Products (up to December)



Source : GTA

Excl. Live animals



Follow market updates via the Meat Market Observatory

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

Annex III



BEEF & VEAL MARKET SITUATION



Meat Market Observatory
Economic Board Meeting
16 March 2017

LIVESTOCK

EU EVOLUTION TOTAL BOVINE

JUNE SURVEY



European
Commission

May/Jun 1000 Hd	TOT LIVESTOCK				%Var 2016 2015	BOVINE < 1 Year				%Var 2016 2015	BOVINE 1-2 Year				%Var 2016 2015	BOVINE > 2 Year				%Var 2016 2015
	2013	2014	2015	2016		2013	2014	2015	2016		2013	2014	2015	2016		2013	2014	2015	2016	
BE	2 433	2 521	2 531	2 470	-2.4%	689	734	744	728	-2.1%	495	506	504	493	-2.2%	1 248	1 282	1 283	1 248	-2.7%
BG																				
CZ																				
DK	1 603	1 585	1 568	1 583	+1.0%	523	528	524	547	+4.4%	328	318	316	307	-2.8%	752	739	728	730	+0.3%
DE	12 587	12 702	12 653	12 563	-0.7%	3 849	3 874	3 846	3 805	-1.1%	3 011	3 004	3 002	2 983	-0.6%	5 727	5 824	5 805	5 775	-0.5%
EE																				
IE	6 903	6 926	6 964	7 221	+3.7%	1 968	1 878	2 042	2 126	+4.1%	1 811	1 767	1 705	1 853	+8.7%	3 123	3 280	3 216	3 242	+0.8%
EL																				
ES	5 822	6 008	6 234	6 445	+3.4%	2 026	2 172	2 281	2 404	+5.4%	801	795	898	899	+0.1%	2 995	3 041	3 055	3 142	+2.9%
FR	19 179	19 286	19 463	19 559	+0.5%	5 497	5 530	5 603	5 638	+0.6%	3 529	3 476	3 540	3 561	+0.6%	10 153	10 280	10 319	10 362	+0.4%
HR																				
IT	6 053	6 197	6 146	6 183	+0.6%	1 587	1 703	1 670	1 702	+1.9%	1 480	1 445	1 370	1 502	+9.7%	2 986	3 049	3 107	2 979	-4.1%
CY																				
LV																				
LT																				
LU																				
HU																				
MT																				
NL	4 000	4 068	4 134	4 244	+2.7%	1 616	1 643	1 624	1 691	+4.1%	624	634	672	630	-6.3%	1 759	1 791	1 838	1 923	+4.7%
AT	1 939	1 937	1 950	1 933	-0.9%	604	613	622	605	-2.7%	435	424	437	441	+0.8%	900	901	891	887	-0.5%
PL	5 860	5 920	5 961	5 939	-0.4%	1 586	1 609	1 669	1 728	+3.6%	1 422	1 433	1 529	1 576	+3.1%	2 852	2 879	2 763	2 635	-4.6%
PT																				
RO	2 054	2 069	2 078	2 081	+0.2%	478	479	477	481	+0.9%	236	236	235	240	+2.3%	1 340	1 354	1 366	1 360	-0.4%
SI																				
SK																				
FI																				
SE	1 506	1 493	1 476	1 489	+0.9%	468	472	466	475	+2.0%	381	370	372	375	+0.8%	657	651	638	639	+0.1%
UK	9 843	9 837	9 919	10 019	+1.0%	2 808	2 801	2 912	2 984	+2.5%	2 474	2 384	2 380	2 449	+2.9%	4 561	4 652	4 626	4 587	-0.8%
EU	79 781	80 550	81 076	81 730	+0.8%	23 698	24 035	24 481	24 915	+1.8%	17 027	16 792	16 959	17 308	+2.1%	39 055	39 722	39 635	39 509	-0.3%

Source : EStat Newcronos

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

13 March 2017

Agriculture
and Rural
Development

LIVESTOCK

EU EVOLUTION TOTAL BOVINE

JUNE SURVEY



European
Commission

May/Jun 1000 Hd	TOTAL COWS				%Var 2016 2015	DAIRY COWS				%Var 2016 2015	OTHER COWS				%Var 2016 2015
	2013	2014	2015	2016		2013	2014	2015	2016		2013	2014	2015	2016	
BE	1 007	971	987	971	-1.6%	510	522	524	522	-0.4%	498	449	463	449	-3.0%
BG															
CZ															
DK	678	664	661	669	+1.2%	576	563	561	572	+2.0%	102	101	99	97	-2.0%
DE	4 896	4 981	4 969	4 957	-0.2%	4 223	4 311	4 287	4 272	-0.3%	673	670	682	685	+0.4%
EE															
IE	2 313	2 355	2 372	2 502	+5.5%	1 163	1 226	1 296	1 398	+7.9%	1 150	1 129	1 076	1 104	+2.6%
EL															
ES	2 595	2 716	2 678	2 810	+4.9%	823	876	853	827	-3.0%	1 772	1 840	1 825	1 983	+8.7%
FR	7 682	7 759	7 809	7 838	+0.4%	3 545	3 615	3 606	3 576	-0.8%	4 137	4 144	4 203	4 263	+1.4%
HR															
IT	2 381	2 382	2 375	2 245	-5.5%	1 989	2 053	2 061	1 948	-5.5%	392	329	314	297	-5.4%
CY															
LV															
LT															
LU															
HU															
MT															
NL	1 637	1 655	1 702	1 811	+6.4%	1 553	1 572	1 622	1 743	+7.5%	84	82	80	68	-15.4%
AT	769	770	762	755	-0.9%	524	534	540	536	-0.6%	245	236	222	218	-1.8%
PL	2 531	2 479	2 444	2 332	-4.6%	2 361	2 310	2 279	2 146	-5.8%	170	169	165	186	+12.6%
PT															
RO	1 222	1 224	1 233	1 228	-0.4%	1 208	1 207	1 216	1 216	-0.0%	13	17	17	12	-29.4%
SI															
SK															
FI															
SE	539	531	523	525	+0.4%	346	344	338	331	-2.2%	193	186	184	194	+5.1%
UK	3 393	3 411	3 472	3 490	+0.5%	1 782	1 841	1 895	1 895	idem	1 611	1 569	1 576	1 594	+1.1%
EU	31 642	31 899	31 987	32 132	+0.5%	20 603	20 976	21 078	20 981	-0.5%	11 040	10 922	10 907	11 150	+2.2%

Source : EStat Newcronos

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

13 March 2017

LIVESTOCK

EU EVOLUTION TOTAL BOVINE

DECEMBER SURVEY



European
Commission

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2016 2015	BOVINE < 1 Year				%Var 2016 2015	BOVINE 1-2 Year				%Var 2016 2015	BOVINE > 2 Year				%Var 2016 2015
	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

13 March 2017

Agriculture
and Rural
Development



European
Commission

Dec 1000 Hd	TOTAL COWS				%Var 2016 2015	DAIRY COWS				%Var 2016 2015	OTHER COWS				%Var 2016 2015
	2013	2014	2015	2016		2013	2014	2015	2016		2013	2014	2015	2016	
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%

Source : EStat Newcronos

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

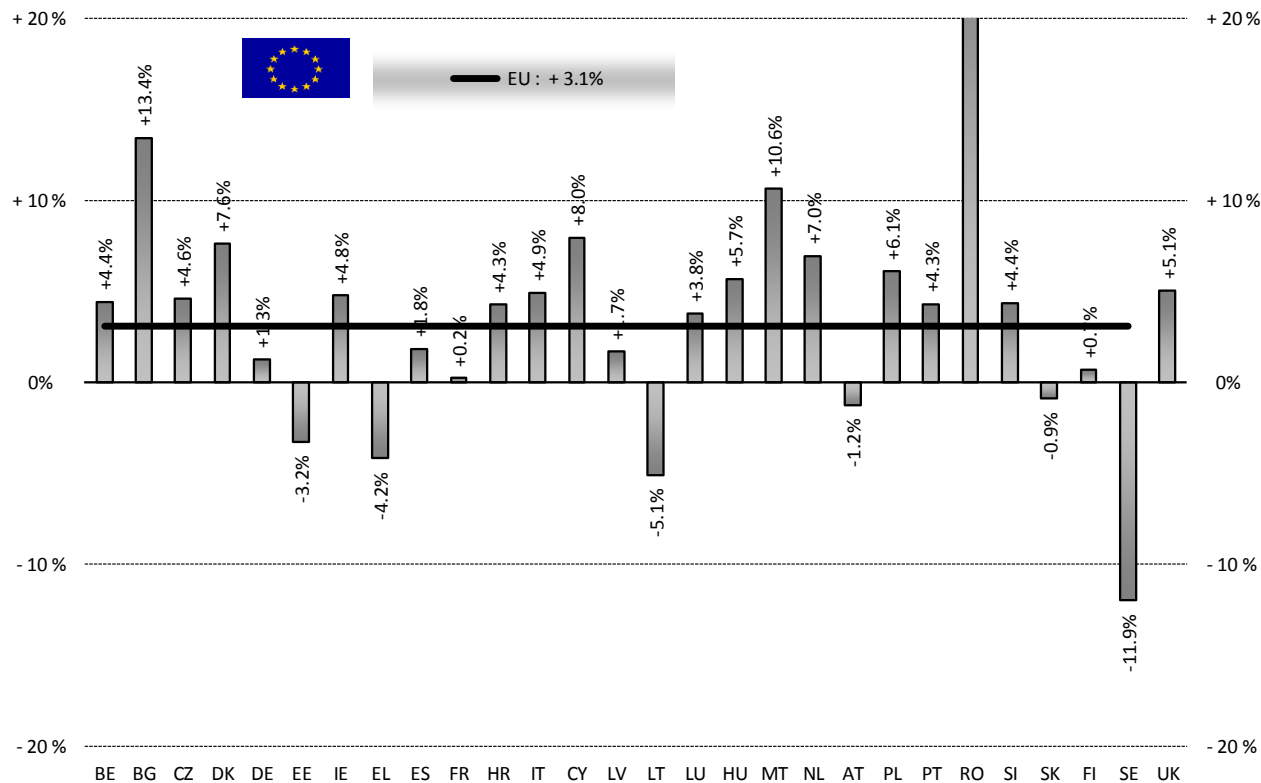
13 March 2017



European Commission

HEADS	Jan-Dec 15/16	
	EU15	EU28
Bull	-1.7%	-1.2%
Bullock	+0.7%	+0.7%
Cow	+6.1%	+7.0%
Heifer	+5.5%	+6.0%
Calve	+2.4%	+2.3%
Young cattle	+0.9%	+1.6%
Meat of bovine animals	+2.6%	+3.1%

Estimates for last month of period : UK



Source : EStat - Newcronos

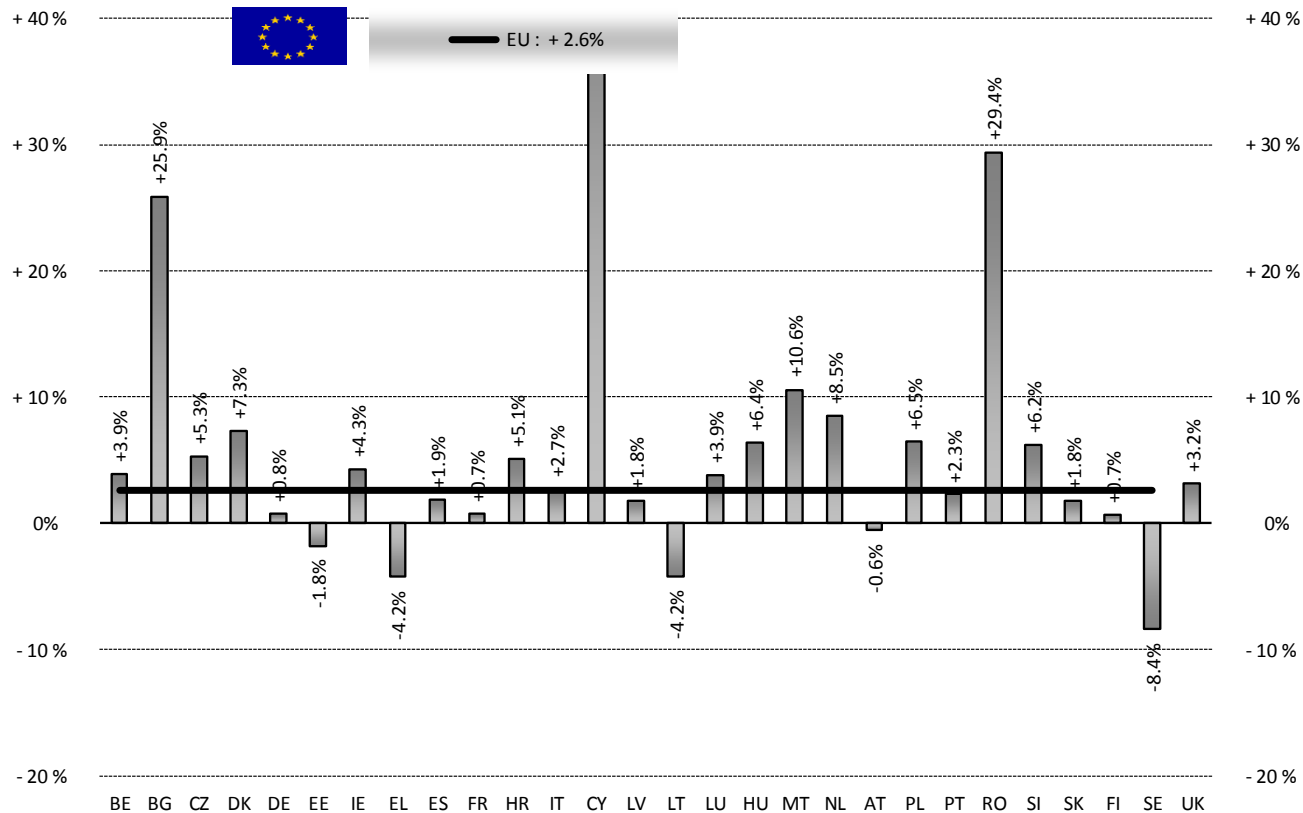
PRODUCTION

% EVOLUTION TONNES



European
Commission

TONNES	Jan-Dec 15/16	
	EU15	EU28
Bull	-1.5%	-0.9%
Bullock	+0.8%	+0.8%
Cow	+5.1%	+5.8%
Heifer	+4.5%	+5.0%
Calve	+3.1%	+3.1%
Young cattle	+1.0%	+2.0%
Meat of bovine animals	+2.1%	+2.6%



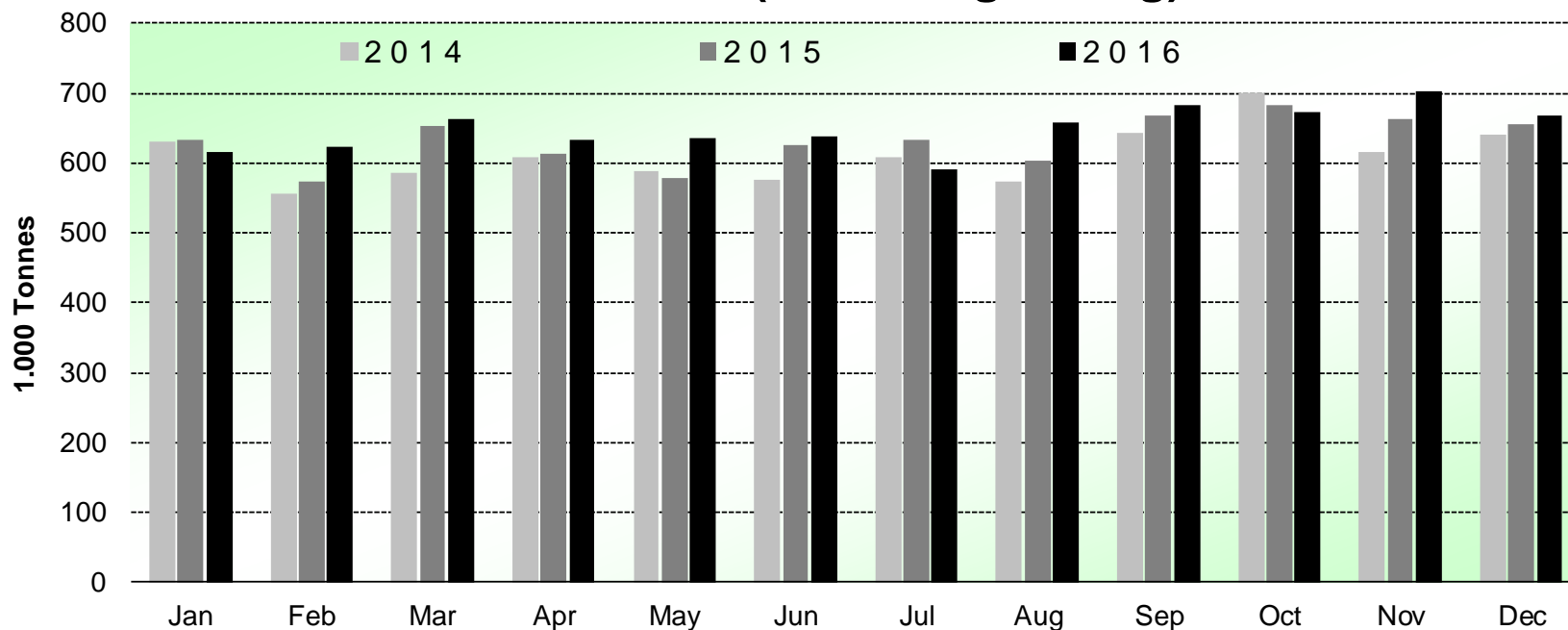
Estimates for last month of period : UK

Source : EStat - Newcronos

13 March 2017



Beef & Veal Production (E28 Slaughtering) - Tonnes



Source : EStat-Newcronos

13 March 2017

PRICES CARCASSES



EU Prices week		9	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	374.0	- 0.4%	- 0.4%	- 0.7%
	Young Bovines (Z)	385.9	- 0.3%	- 1.7%	- 0.3%
	Young Bulls (A)	374.	- 0.3%	- 0.4%	- 0.4%
	Steers (C)	396.1	- 0.5%	- 0.1%	- 2.5%
	Cows (D)	279.0	+ 0.2%	+ 1.5%	+ 1.1%
	Heifers (E)	383.9	+ 0.4%	+ 0.2%	- 0.1%
Live Animals	Male Calves Dairy Type	86.55	+ 2.0%	+ 9.9%	+ 9.2%
	Male Calves Beef Type	210.8	- 0.1%	- 2.3%	- 0.1%
	Young Store Cattle	2.39	+ 0.5%	+ 1.4%	+ 0.3%
	Yearling Male Store Cattle	2.33	+ 0.4%	+ 0.9%	- 0.4%
	Yearling Female Store Cattle	2.34	+ 1.9%	+ 0.6%	+ 0.8%
	Calves slaughtered <8M	524.5	- 0.3%	- 2.4%	- 2.8%

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

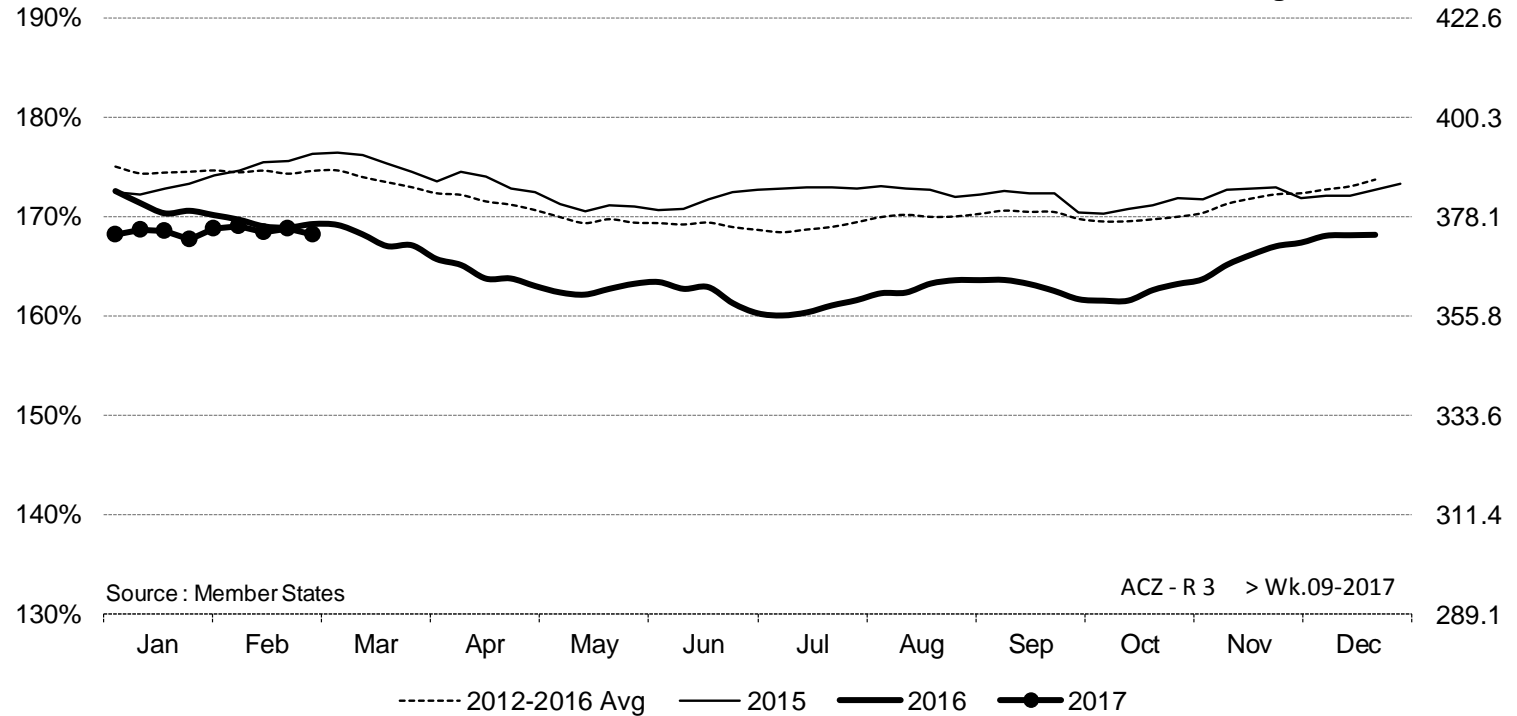
13 March 2017



ACZ - R 3 > Wk.09-2017

% of Reference Price

€/100 kg cwe



Source : Member States

ACZ - R 3 > Wk.09-2017

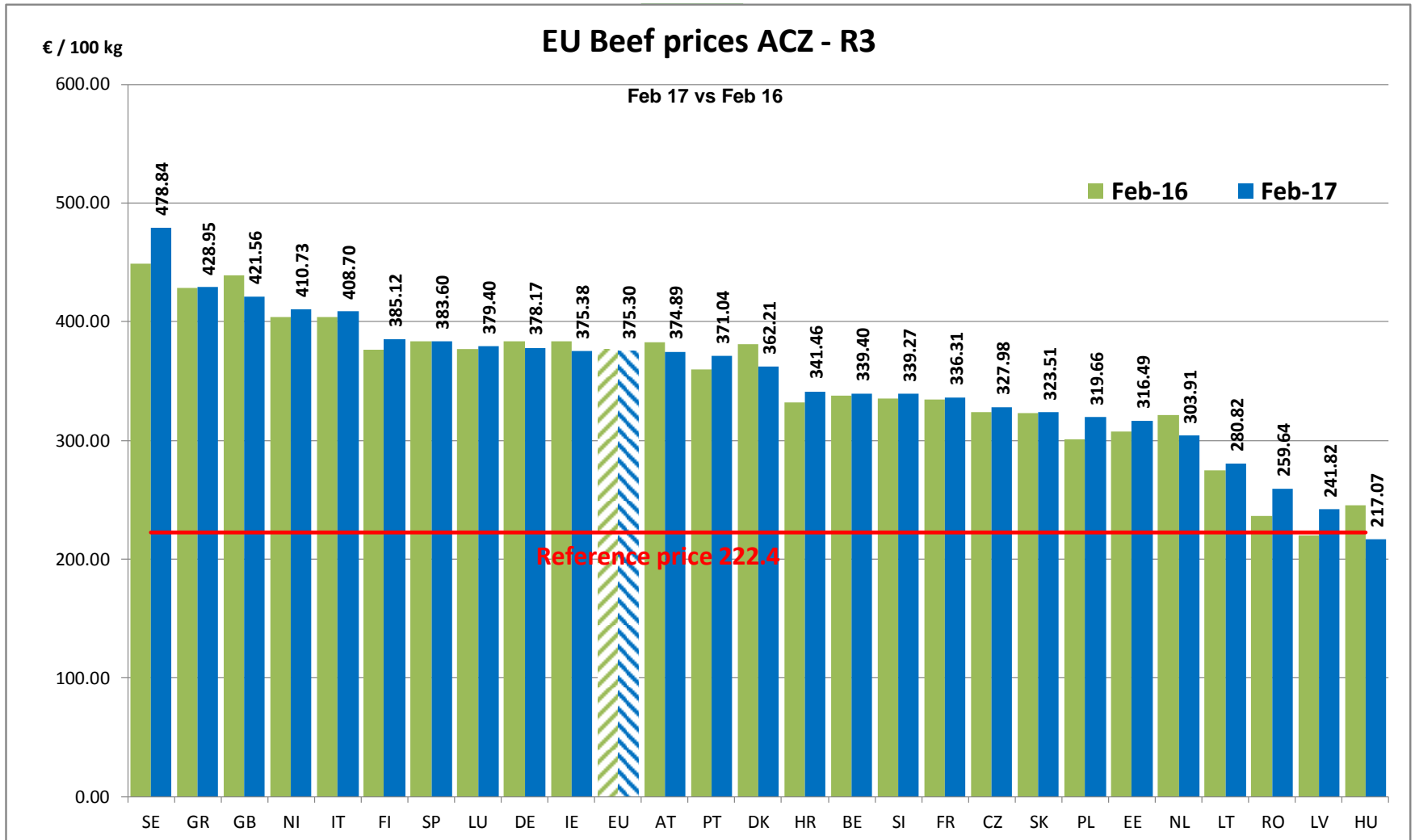
130% 140% 150% 160% 170% 180% 190%

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

----- 2012-2016 Avg — 2015 — 2016 ● 2017

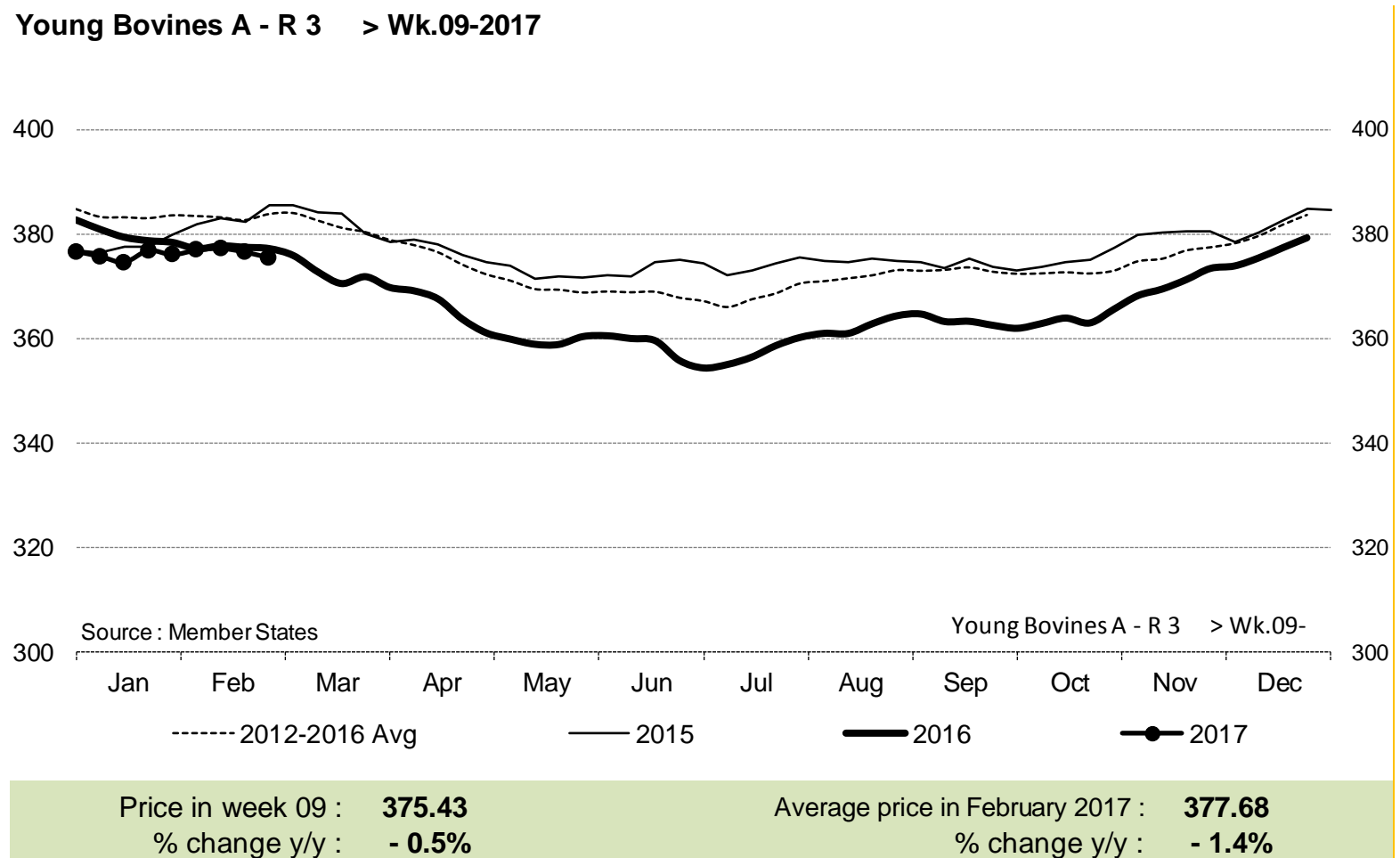
Price in week 09 :	374.04	Average price in February 2017 :	376.92
% change y/y :	-0.7%	% change y/y :	-3.4%
% Ref. Price in wk 9 :	168.2%		

13 March 2017



13 March 2017

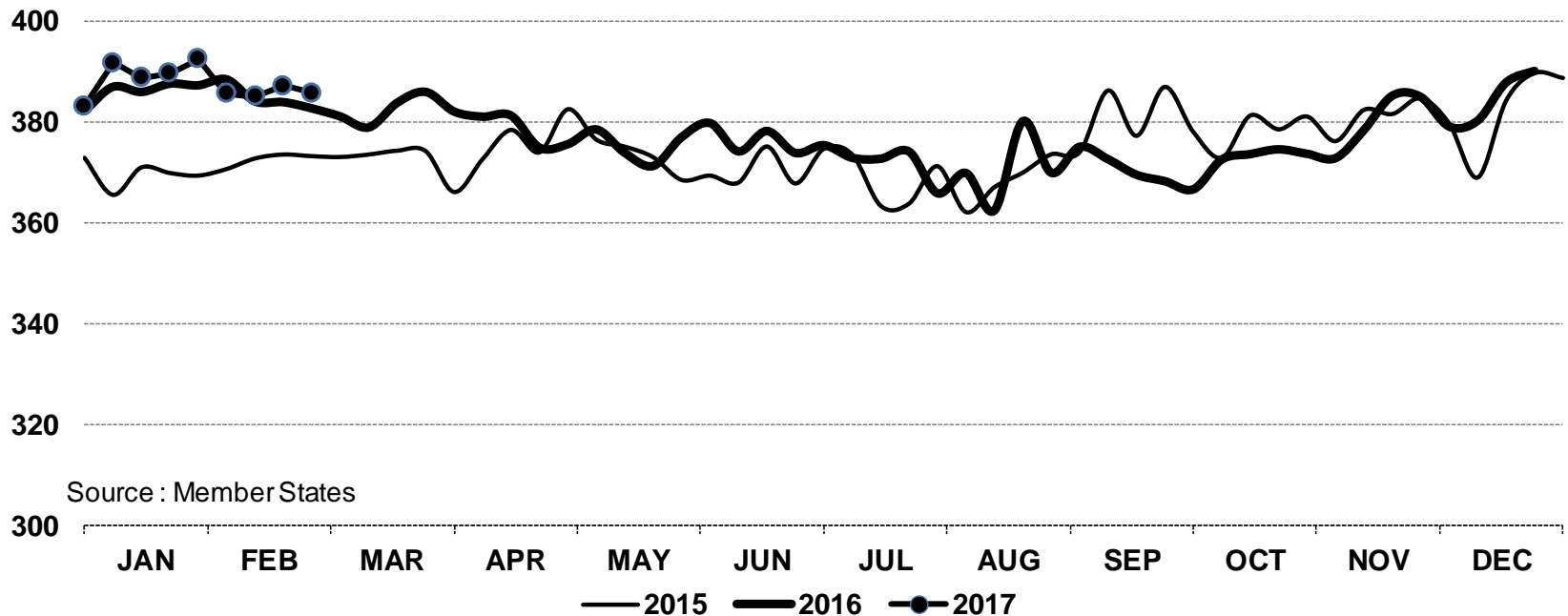
Young Bovines A - R 3 > Wk.09-2017



13 March 2017

In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.09-2016



Price in week 09 : **385.95**
% change y/y : **+ 0.8%**

Average price in February 2017 : **385.94**
% change y/y : **+ 3.6%**

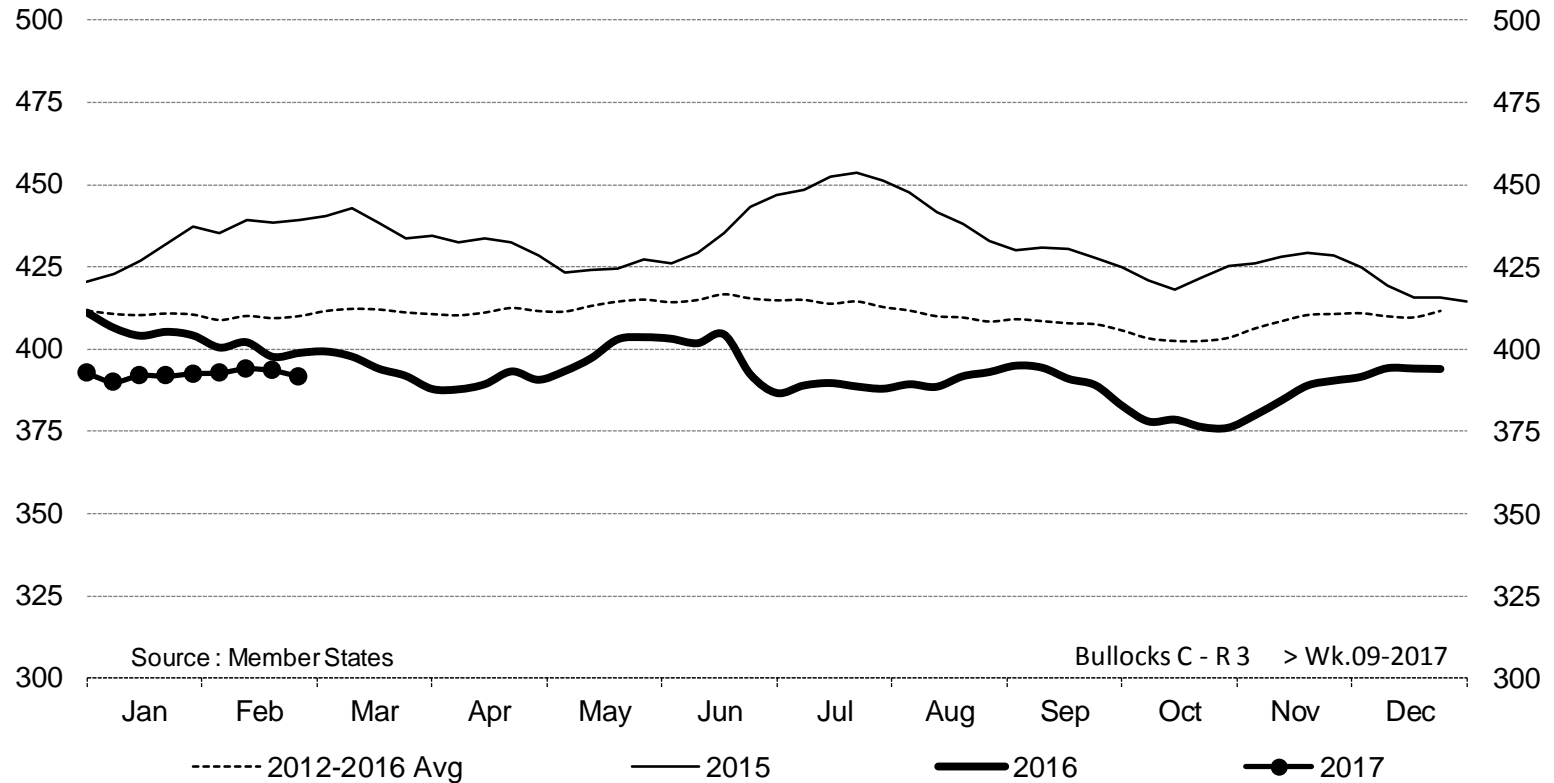
13 March 2017

PRICES CARCASSES

E.U. EVOLUTION STEER - C.R3



Bullocks C - R 3 > Wk.09-2017

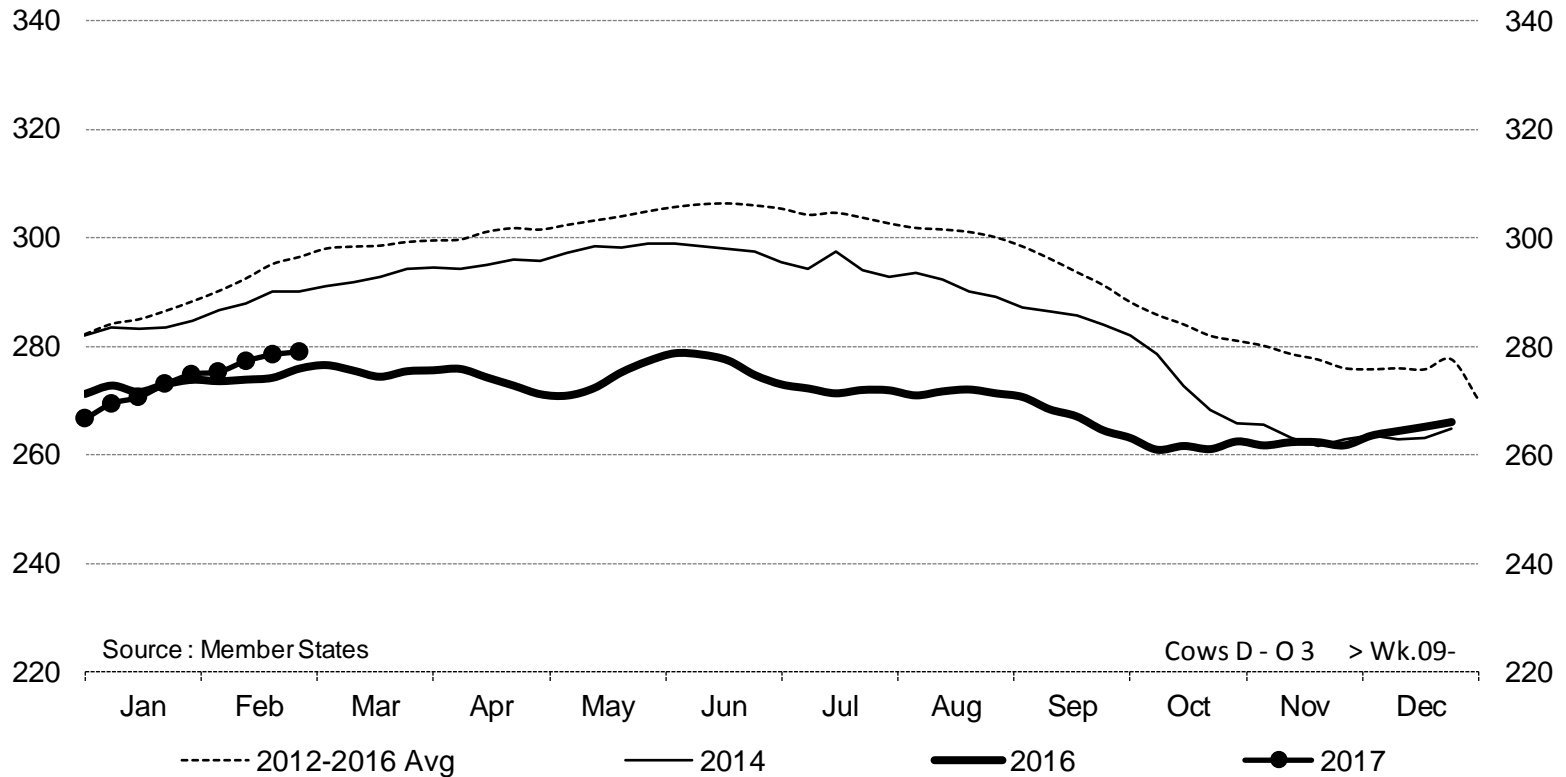


Price in week 09 :	391.60	Average price in February 2017 :	401.01
% change y/y :	- 1.8%	% change y/y :	- 8.4%

13 March 2017



Cows D - O 3 > Wk.09-2017

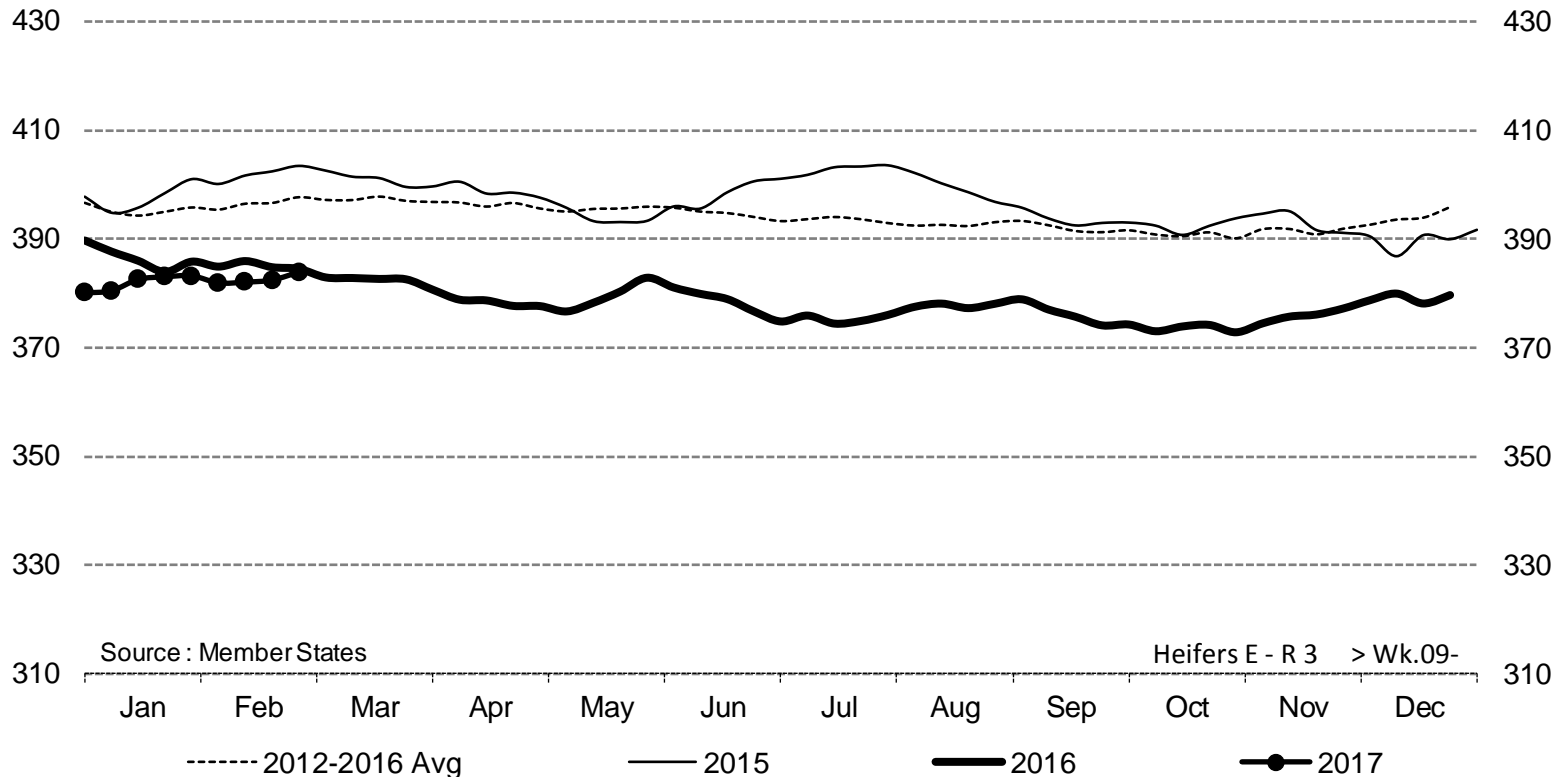


Price in week 09 : **279.04**
% change y/y : **+ 1.1%**

Average price in February 2017 : **273.98**
% change y/y : **- 3.5%**

13 March 2017

Heifers E - R 3 > Wk.09-2017



Price in week 09 : **383.90**
% change y/y : **- 0.1%**

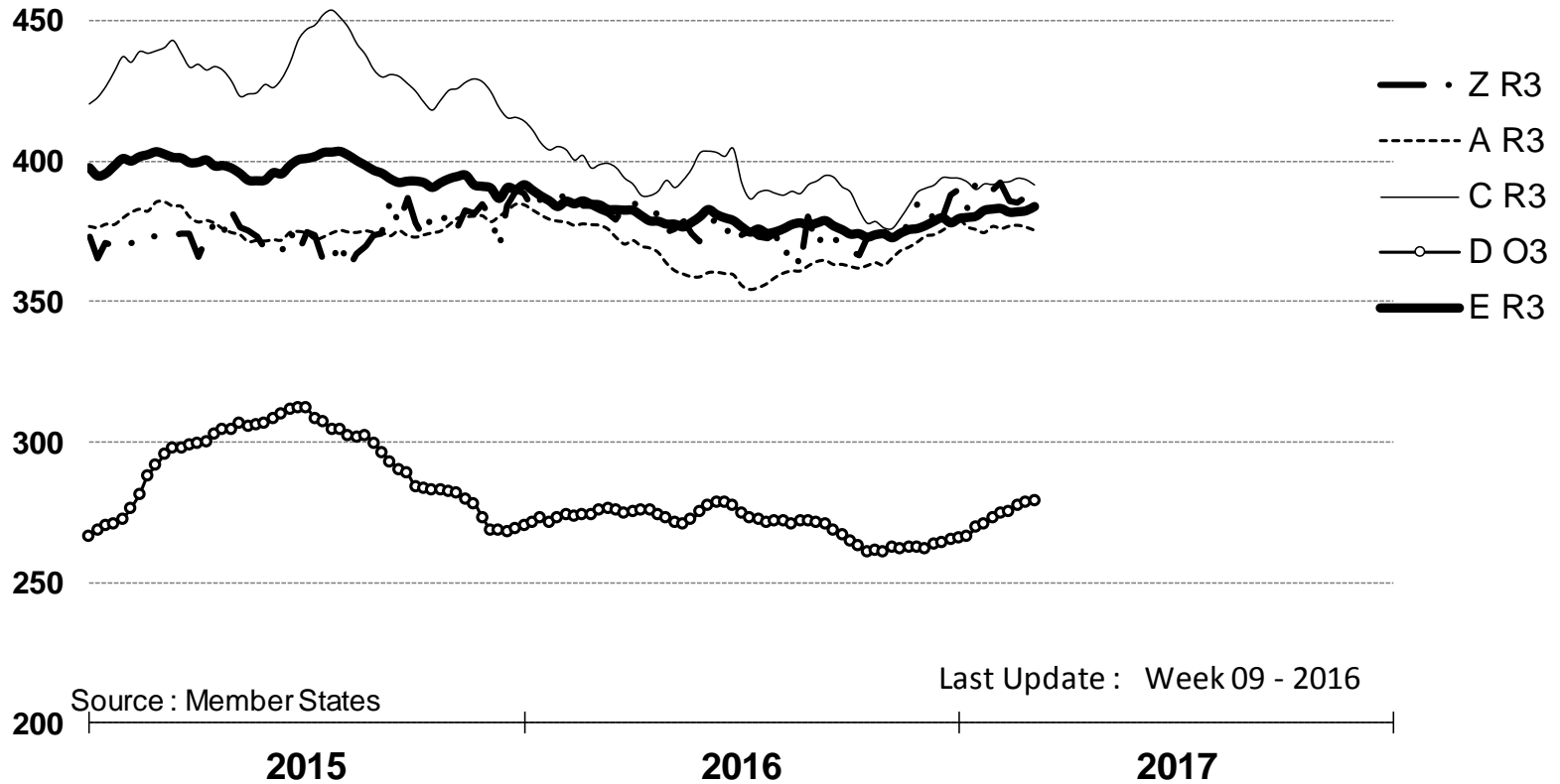
Average price in February 2017 : **385.32**
% change y/y : **- 4.1%**

13 March 2017

PRICES CARCASSES



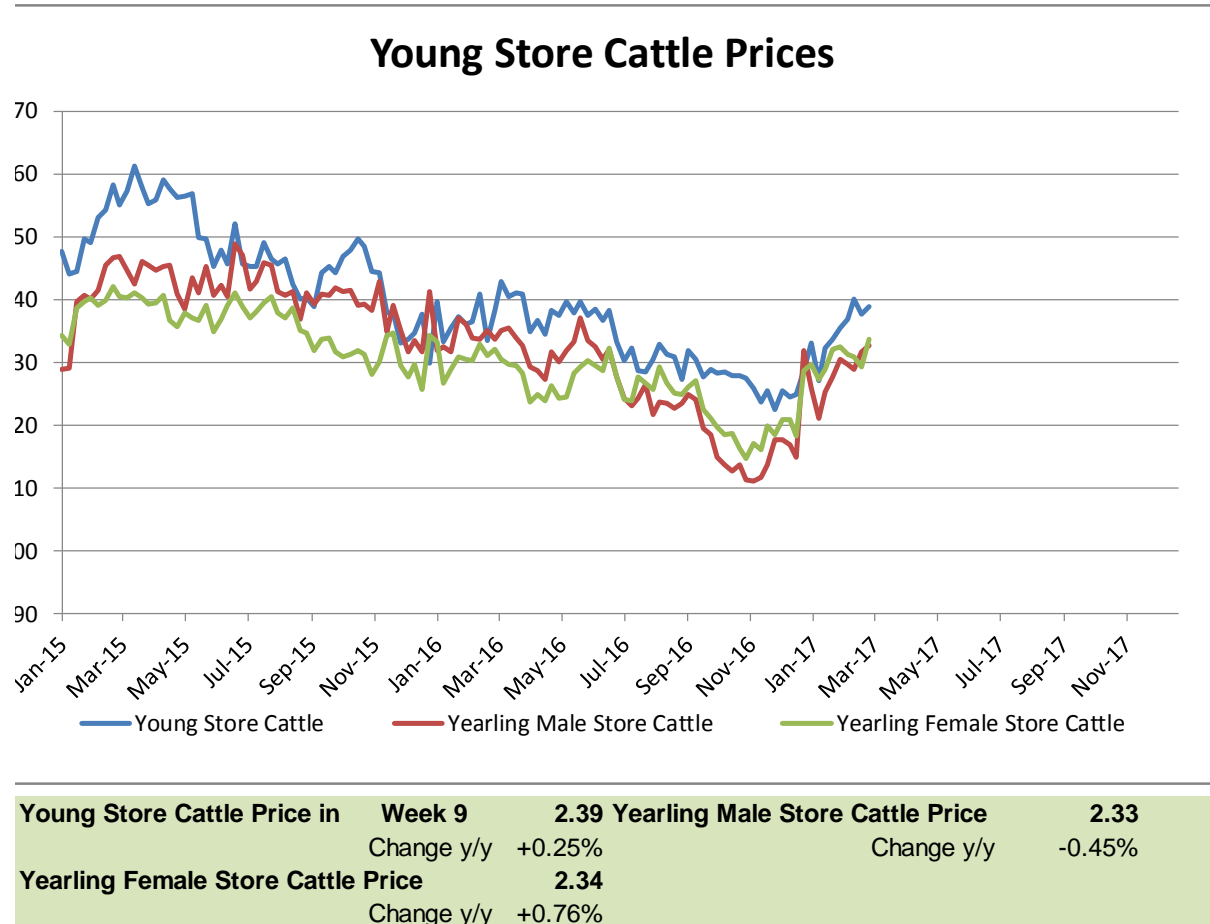
EU EVOLUTION All CAT GLOBAL VIEW



13 March 2017

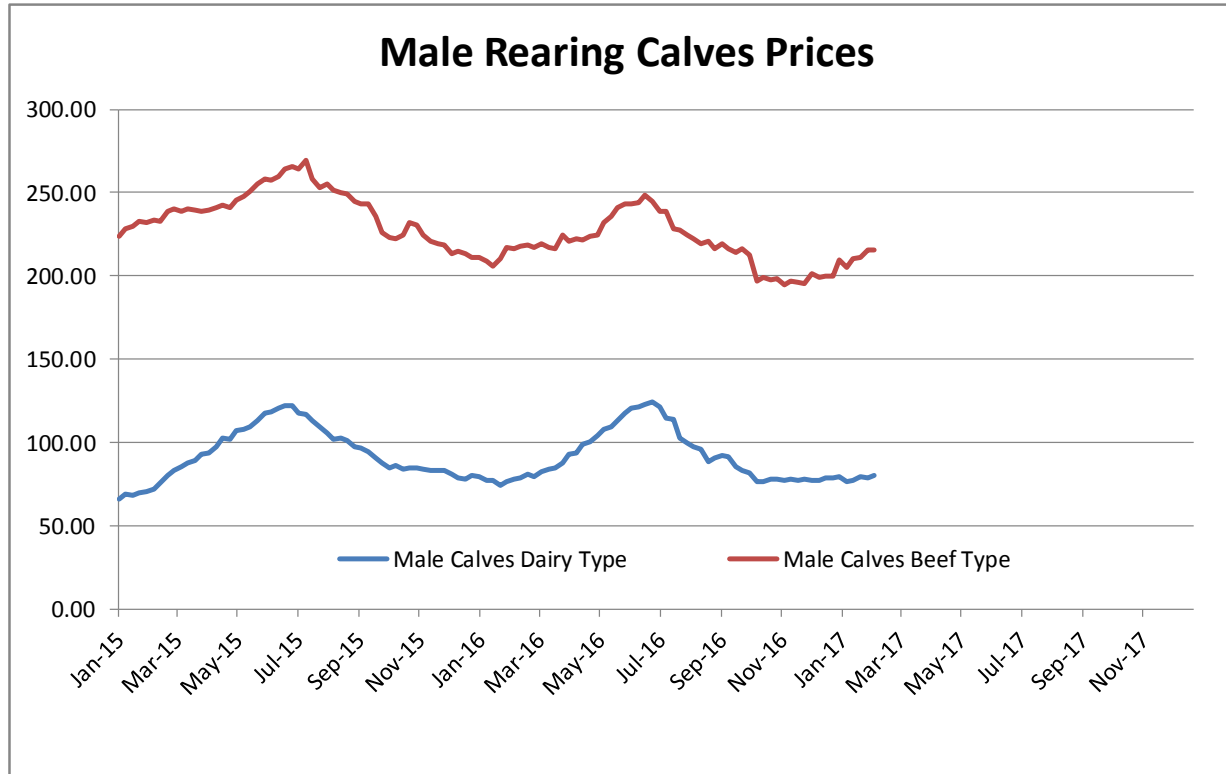


Store cattle (€/100 kg live weight)



13 March 2017

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

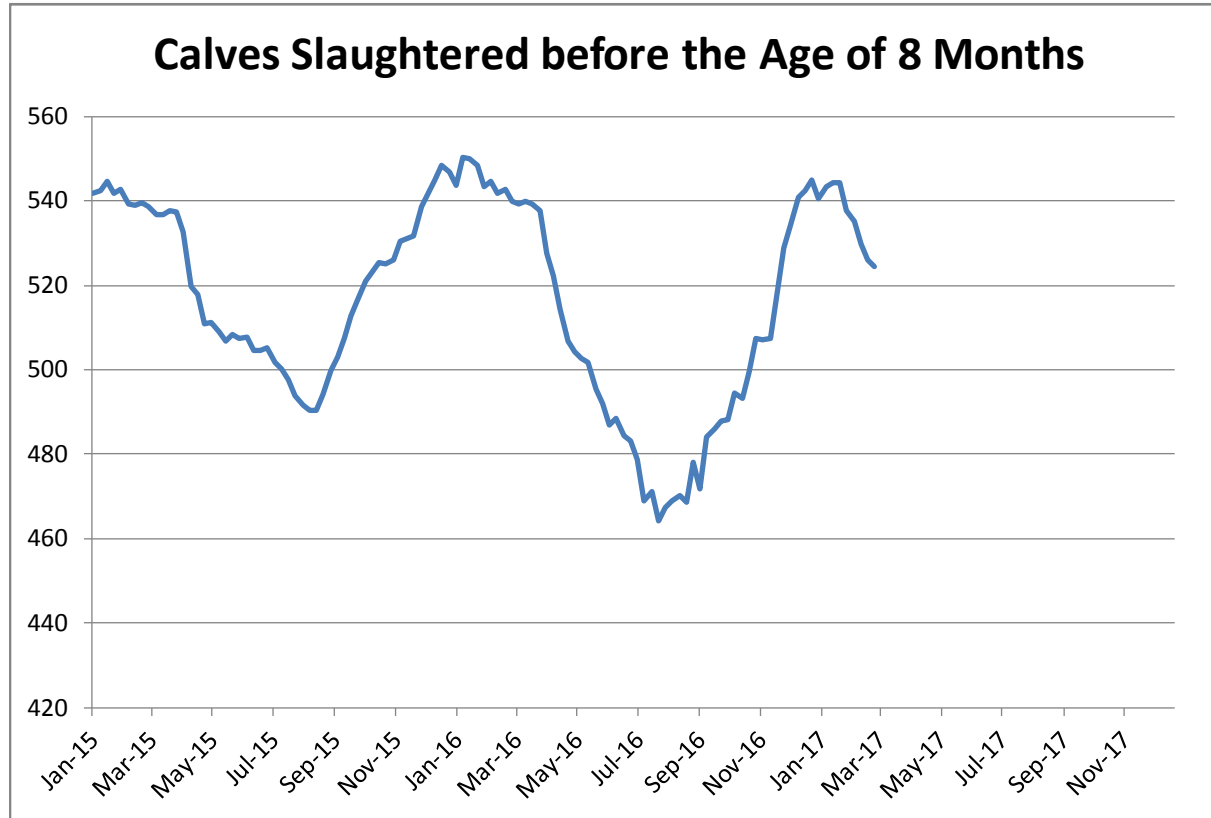


Male Rearing Calves Beef type		Male Rearing Calves Dairy type	
Price in Week 6	215.78	Price in Week 6	80.42
Change y/y	-0.28%	Change y/y	+3.19%

13 March 2017



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



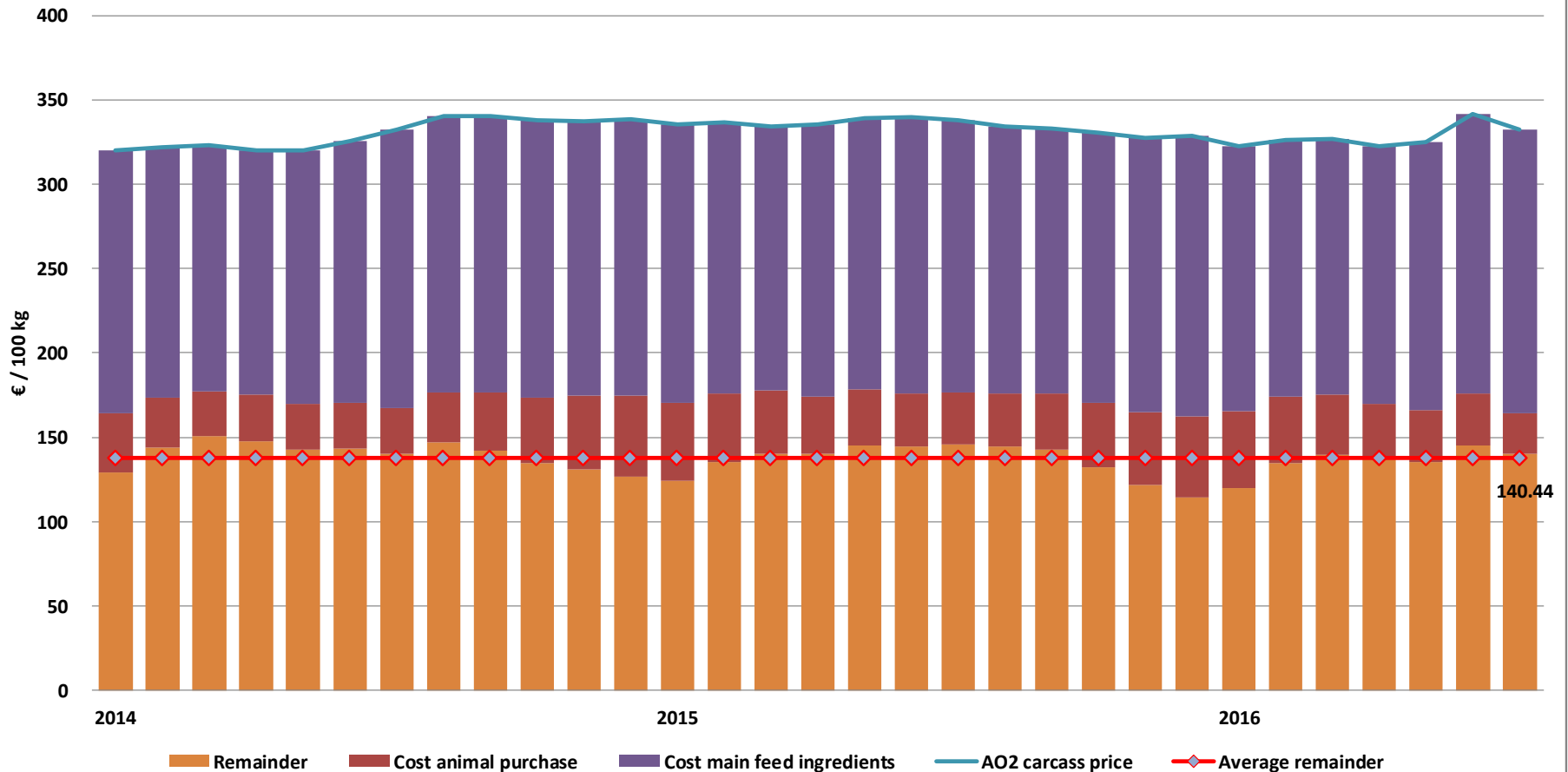
Price in Week 9 **524.54 € / 100 kg of carcasse weight**
 Change y/! -2.81%

13 March 2017

REMAINDERS



Remainder for dairy calves fattening

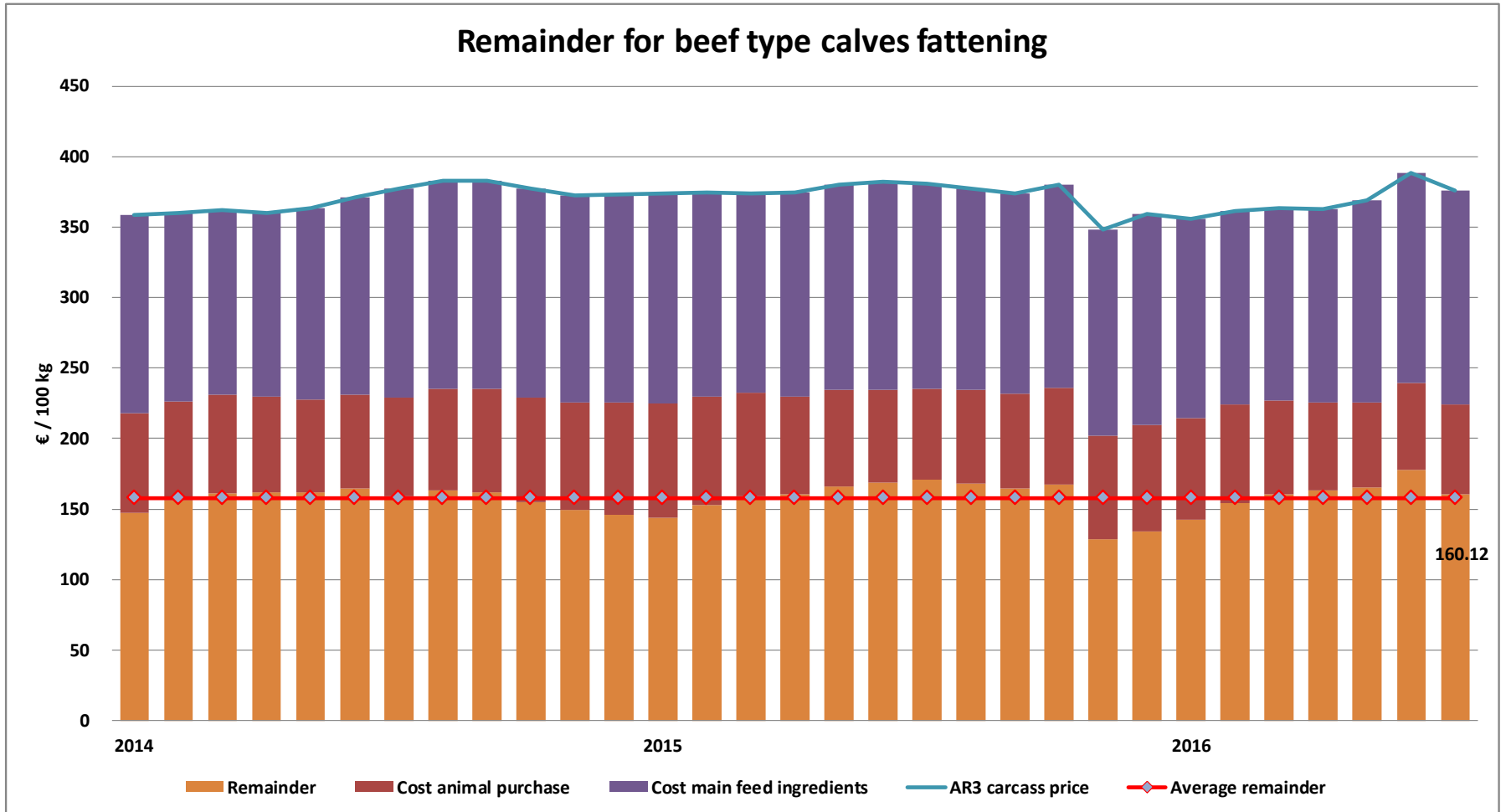


13 March 2017

REMAINDERS



Remainder for beef type calves fattening

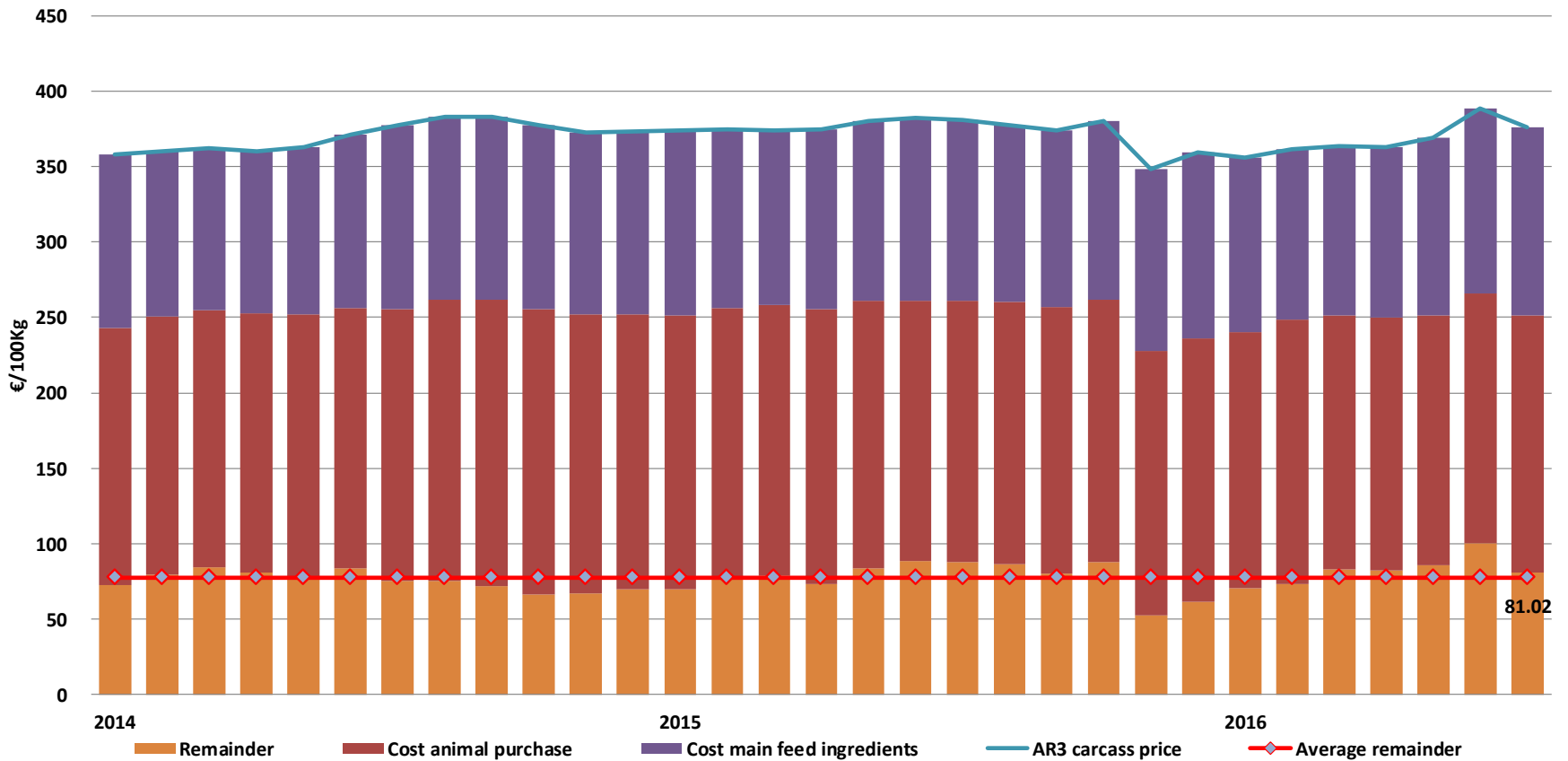


13 March 2017

REMAINDERS



Remainder for young store cattle fattening



13 March 2017

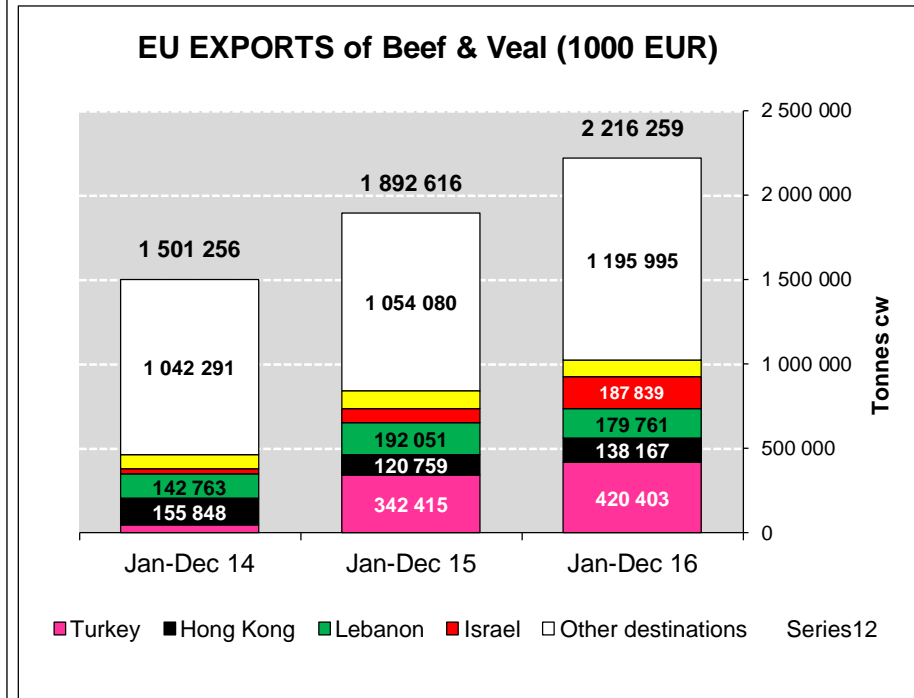
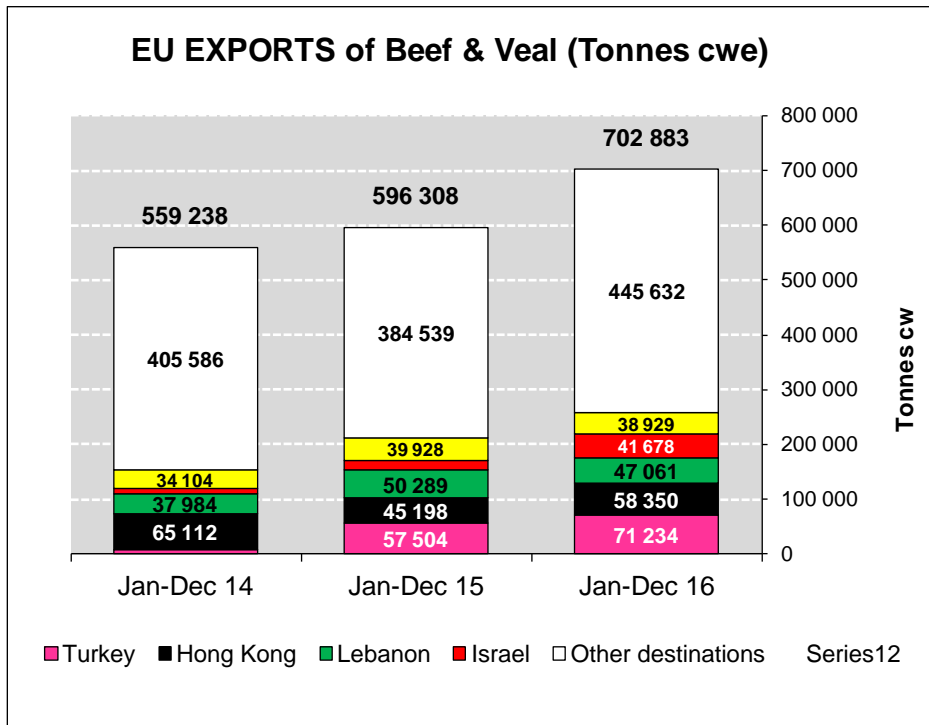


EU exports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Destinations	2012		2013		2014		2015		Jan-Dec 16		Compared to Jan-Dec 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Turkey	101 475	19.6%	5 086	1.1%	8 098	1.4%	57 584	9.6%	71 234	10.1%	+ 23.9%
Hong Kong	17 862	3.4%	28 573	6.3%	65 112	11.6%	45 267	7.6%	58 350	8.3%	+ 29.1%
Lebanon	24 099	4.6%	24 007	5.3%	37 984	6.8%	50 287	8.4%	47 061	6.7%	- 6.4%
Israel	8 435	1.6%	9 378	2.1%	8 353	1.5%	18 862	3.1%	41 678	5.9%	+ 121.1%
Bosnia-Herz.	14 893	2.9%	24 068	5.3%	34 104	6.1%	40 031	6.7%	38 929	5.5%	- 2.5%
Ivory Coast	15 929	3.1%	21 619	4.8%	28 839	5.2%	35 767	6.0%	36 742	5.2%	+ 2.8%
Ghana	28 693	5.5%	40 878	9.0%	33 255	5.9%	37 389	6.2%	35 369	5.0%	- 5.3%
Libya	10 665	2.1%	17 778	3.9%	14 280	2.6%	19 691	3.3%	29 503	4.2%	+ 49.8%
Switzerland	19 573	3.8%	26 347	5.8%	26 634	4.8%	26 038	4.3%	25 669	3.7%	- 1.3%
Algeria	17 323	3.3%	25 911	5.7%	18 499	3.3%	16 085	2.7%	25 004	3.6%	+ 55.4%
Philippines	2 028	0.4%	2 730	0.6%	11 839	2.1%	13 116	2.2%	24 254	3.5%	+ 85.8%
Vietnam	3 042	0.6%	3 175	0.7%	6 410	1.1%	11 627	1.9%	22 252	3.2%	+ 91.4%
Norway	14 620	2.8%	10 222	2.3%	7 879	1.4%	19 129	3.2%	18 374	2.6%	- 3.9%
Russia	97 828	18.9%	72 281	16.0%	96 928	17.3%	13 643	2.3%	16 450	2.3%	+ 21.4%
Egypt	1 305	0.3%	2 592	0.6%	2 763	0.5%	9 835	1.6%	15 924	2.3%	+ 62.4%
Angola	8 258	1.6%	10 589	2.3%	14 587	2.6%	9 644	1.6%	13 549	1.9%	+ 40.5%
For.JRep.Mac	11 321	2.2%	10 577	2.3%	11 370	2.0%	12 562	2.1%	11 781	1.7%	- 6.2%
Other Destinations	132 668	25.6%	127 303	28.1%	143 675	25.7%	175 457	29.3%	182 542	26.0%	
Extra-EU	518 694		452 537		559 238		599 454		702 883		
% change			- 13%		+ 24%		+ 7%		+ 17.9%		

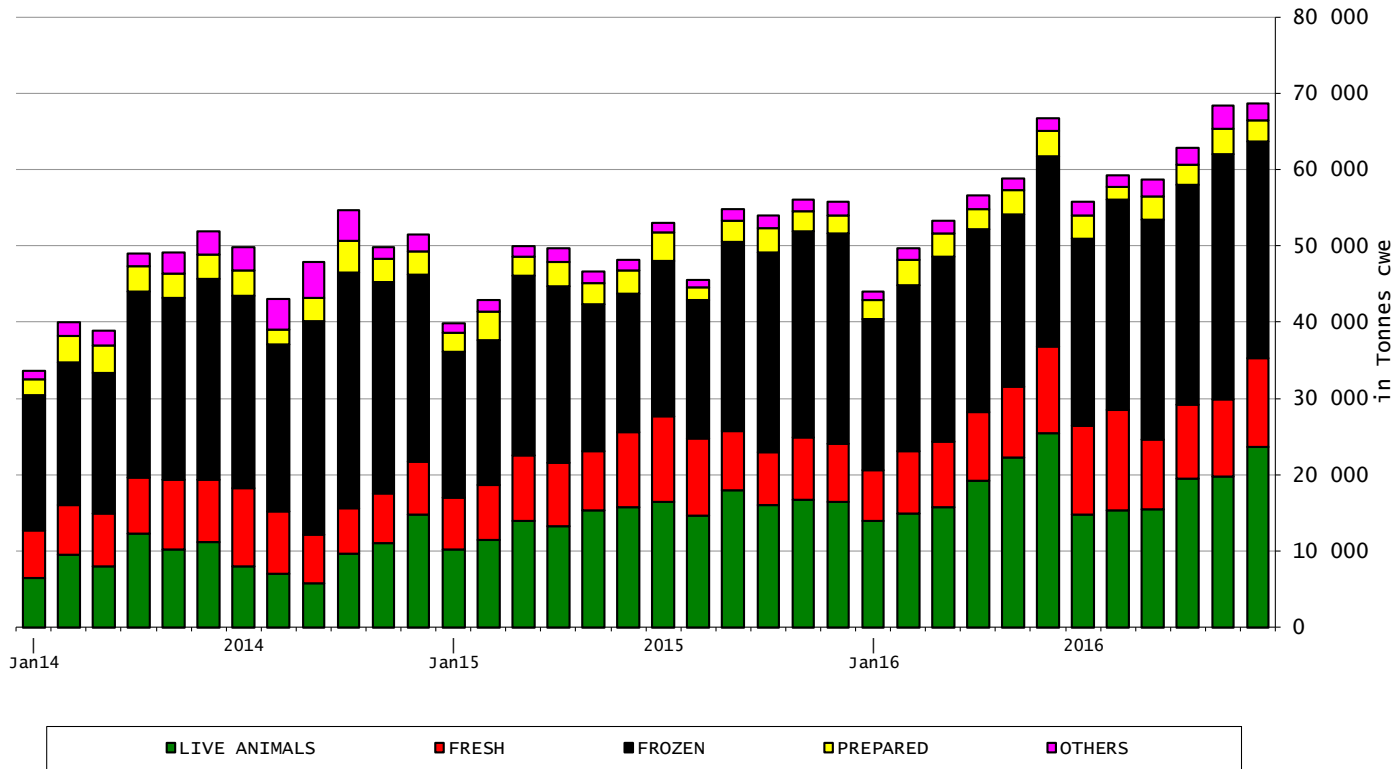


EU exports of beef and live animals: Trade figures (COMEXT)





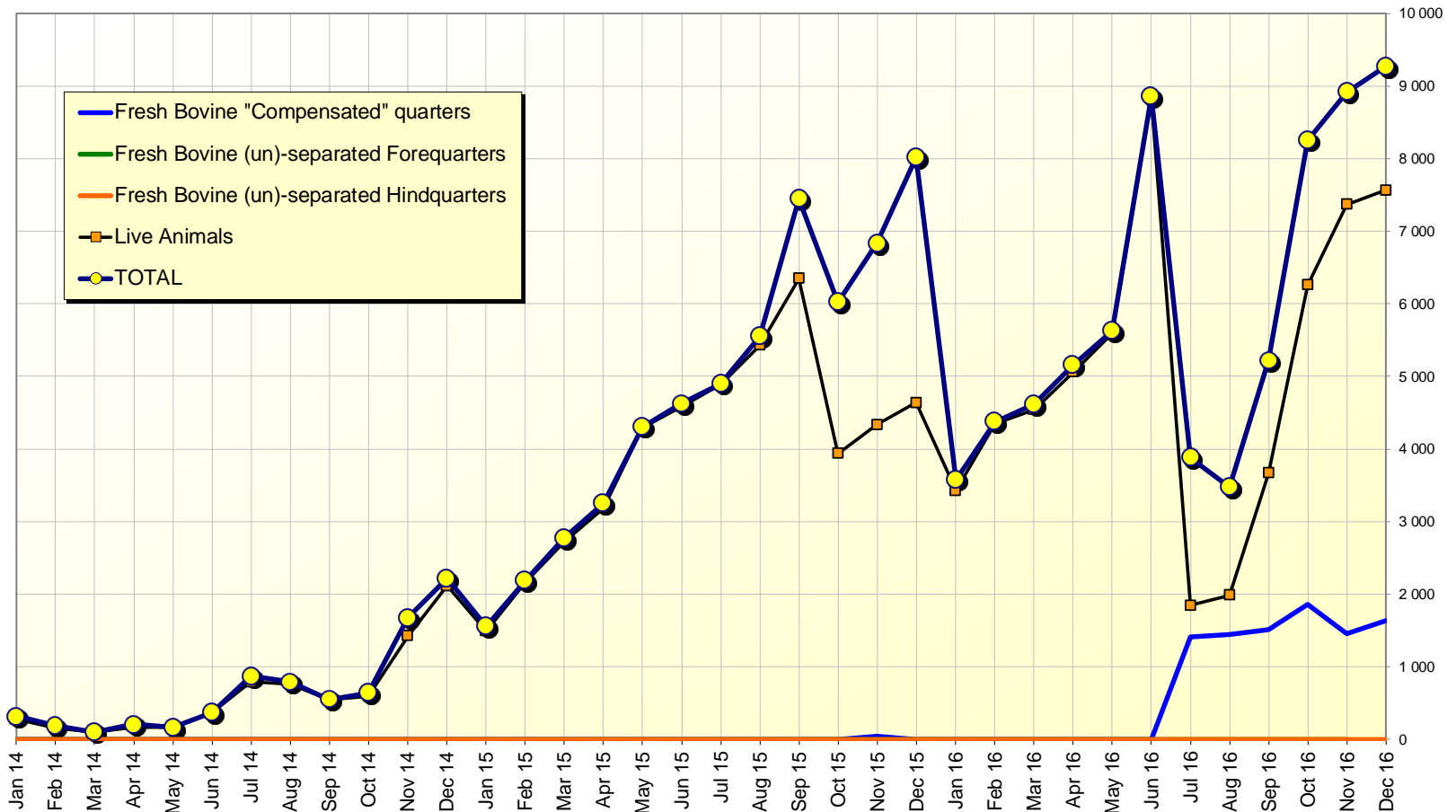
EU-28 Exports of BEEF products



13 March 2017



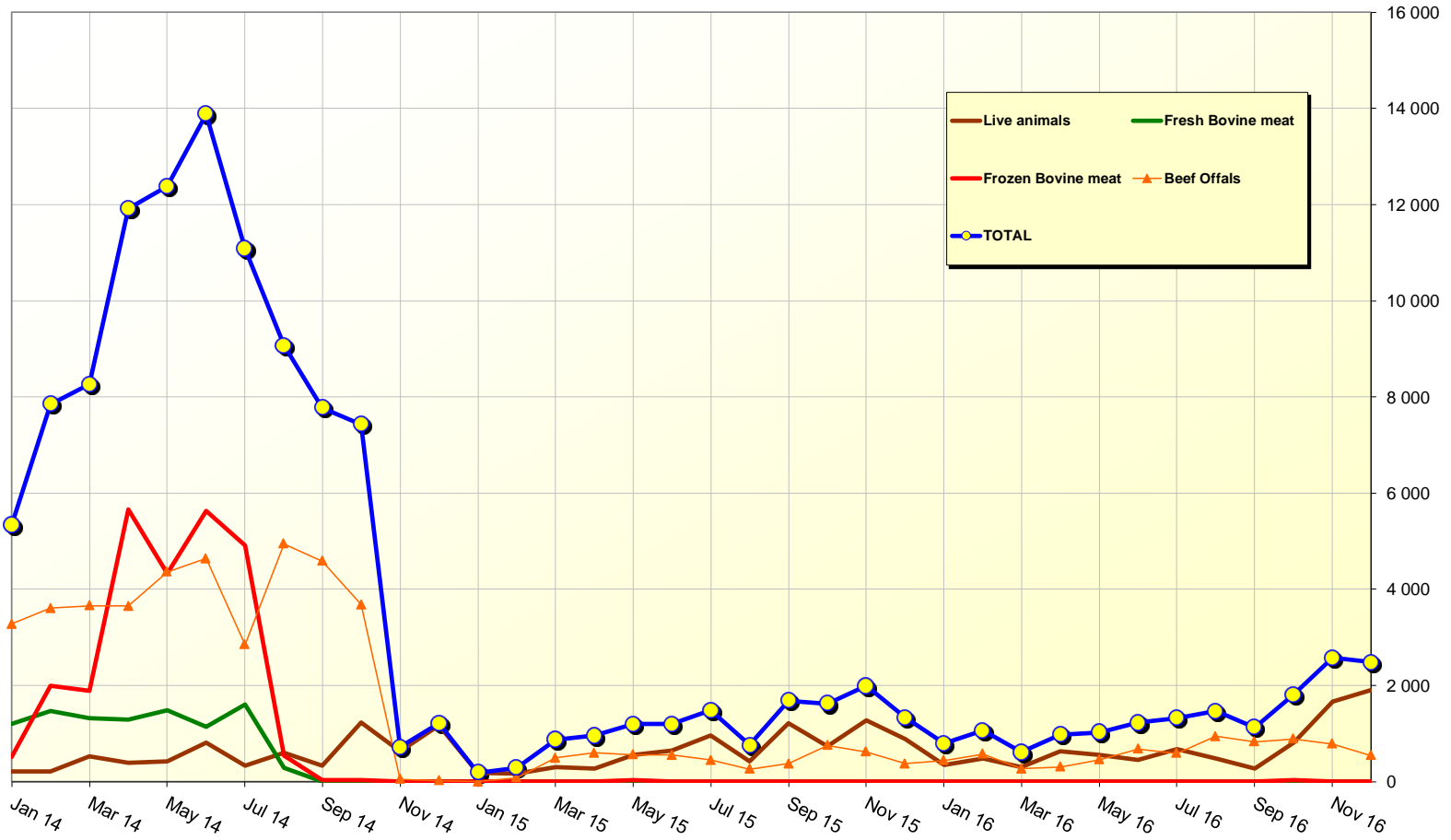
EU beef Exports to TURKEY Trade figures (COMEXT data) tonnes cwe



13 March 2017



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



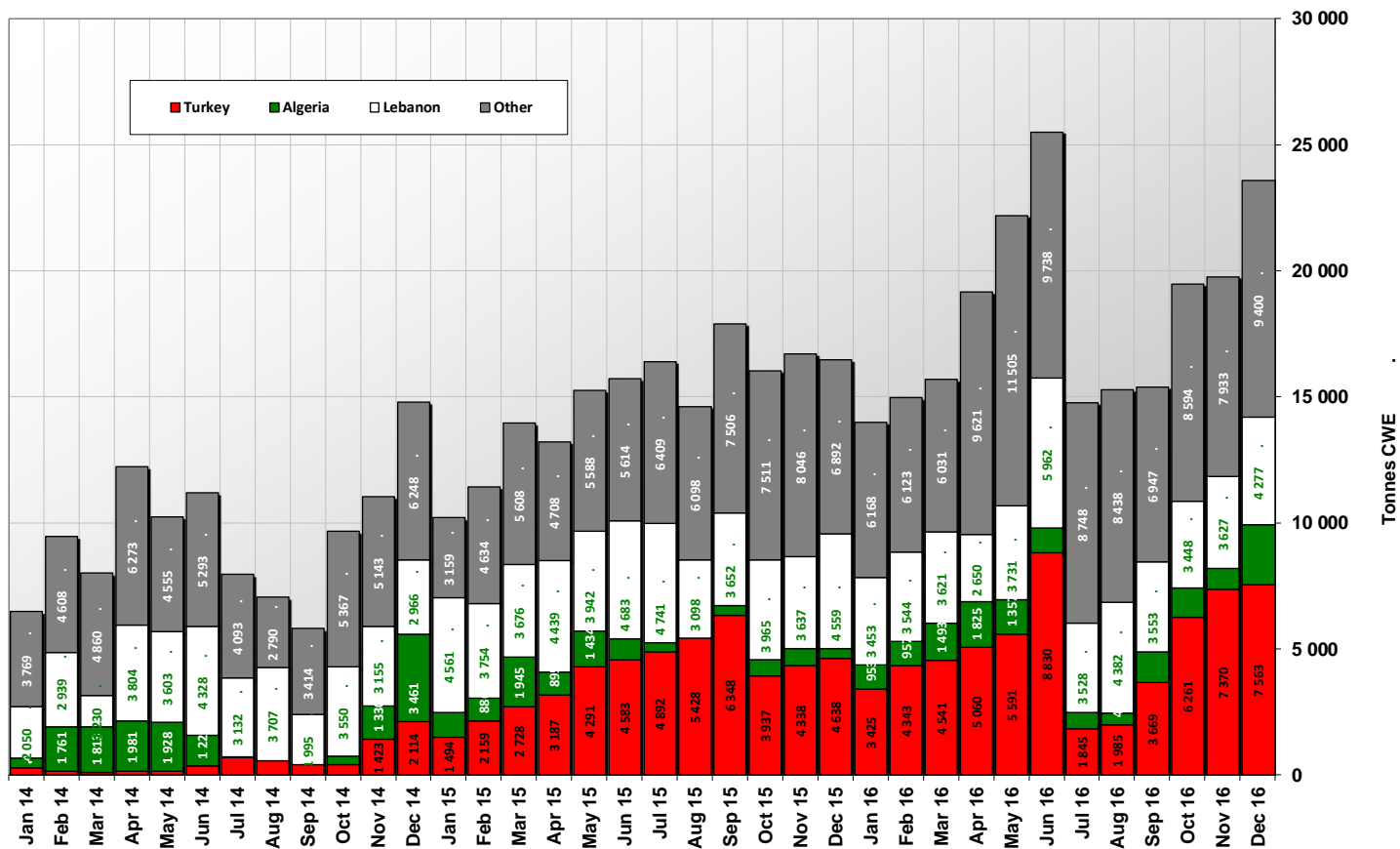
13 March 2017



European
Commission

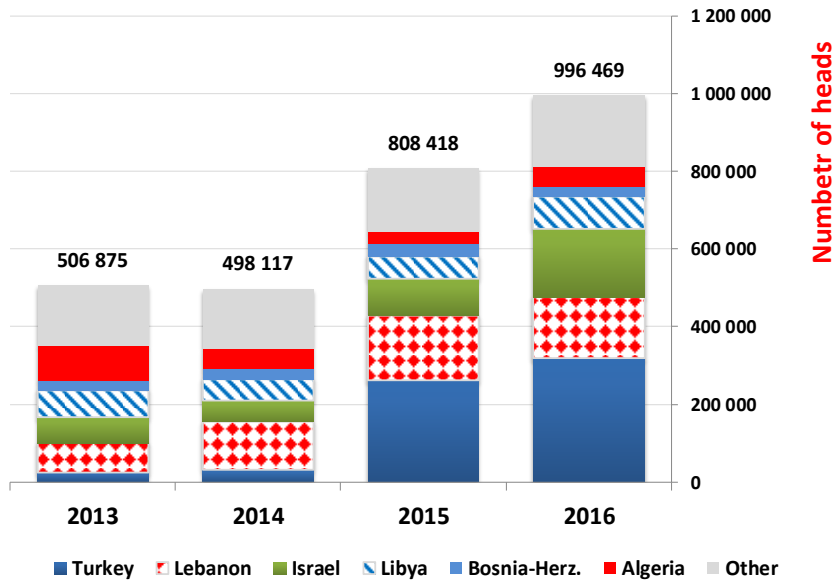
EU-28 Exports of LIVE Bovine Animals

(Source COMEXT - Tonnes cwe)

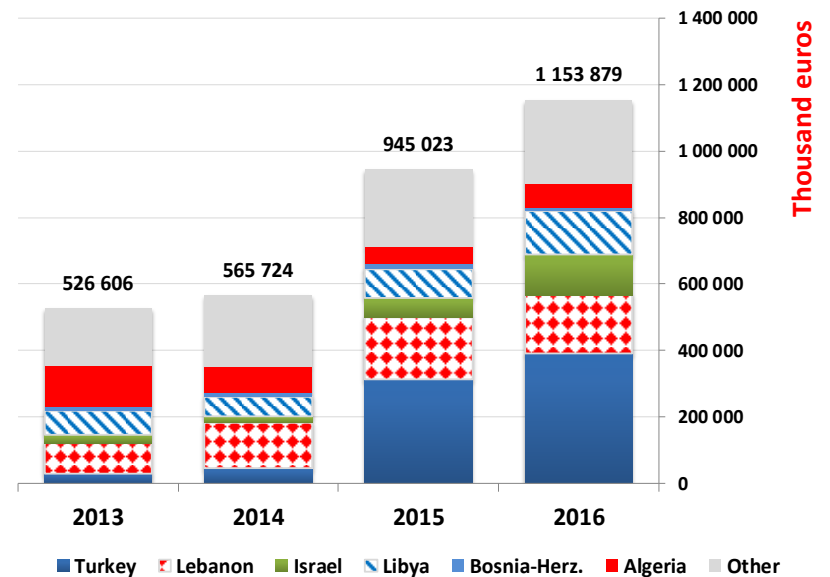


13 March 2017

EU Exports of BEEF live animals by partner for the period Jan-Dec 2016



EU Exports of BEEF live animals by partner for the period Jan-Dec 2016





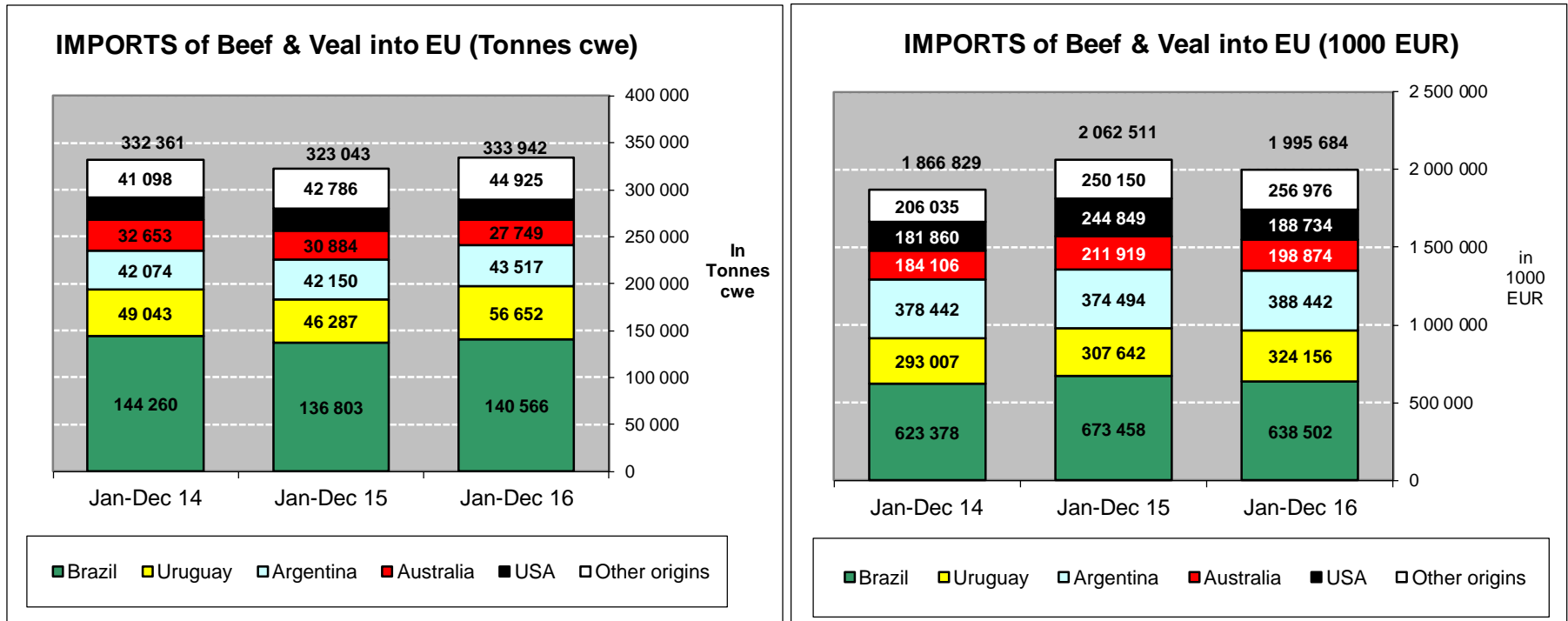
EU imports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Origins	2012		2013		2014		2015		Jan-Dec 16		Compared to Jan-Dec 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	126 344	41.1%	145 435	43.5%	144 259	43.4%	136 705	42.4%	140 566	42.1%	+ 2.8%
Uruguay	51 996	16.9%	51 377	15.4%	49 043	14.8%	46 301	14.3%	56 652	17.0%	+ 22.4%
Argentina	51 693	16.8%	47 976	14.3%	42 074	12.7%	42 135	13.1%	43 517	13.0%	+ 3.2%
Australia	21 290	6.9%	28 074	8.4%	32 653	9.8%	30 879	9.6%	27 749	8.3%	- 10.2%
USA	21 095	6.9%	22 297	6.7%	23 234	7.0%	24 075	7.5%	20 534	6.1%	- 14.9%
Namibia	8 848	2.9%	11 113	3.3%	9 994	3.0%	12 140	3.8%	10 685	3.2%	- 11.8%
New Zealand	15 181	4.9%	13 827	4.1%	14 432	4.3%	11 369	3.5%	9 894	3.0%	- 13.0%
Botswana	474	0.2%	6 280	1.9%	6 424	1.9%	9 258	2.9%	9 382	2.8%	+ 1.3%
Paraguay	101	0.0%	0	0.0%	0	0.0%	1 915	0.6%	5 947	1.8%	+++
Switzerland	4 946	1.6%	4 284	1.3%	5 456	1.6%	5 089	1.6%	5 497	1.6%	+ 8.0%
Chile	1 711	0.6%	537	0.2%	875	0.3%	710	0.2%	602	0.2%	- 15.6%
Serbia	641	0.2%	619	0.2%	425	0.1%	439	0.1%	557	0.2%	+ 27.0%
Japan	0	0.0%	3	0.0%	100	0.0%	216	0.1%	497	0.1%	+ 38.5%
Canada	825	0.3%	965	0.3%	780	0.2%	428	0.1%	425	0.1%	- 0.8%
Ukraine	0	0.0%	0	0.0%	570	0.2%	20	0.0%	317	0.1%	+++
Norway	159	0.1%	201	0.1%	347	0.1%	480	0.1%	272	0.1%	- 43.4%
Iceland	241	0.1%	196	0.1%	163	0.0%	236	0.1%	192	0.1%	- 18.8%
Other Origins	2 161	0.7%	1 444	0.4%	1 532	0.5%	360	0.1%	657	0.2%	
Extra-EU	307 707		334 630		332 361		322 753		333 942		
% change			+ 9%		- 1%		- 3%		+ 3.4%		

13 March 2017

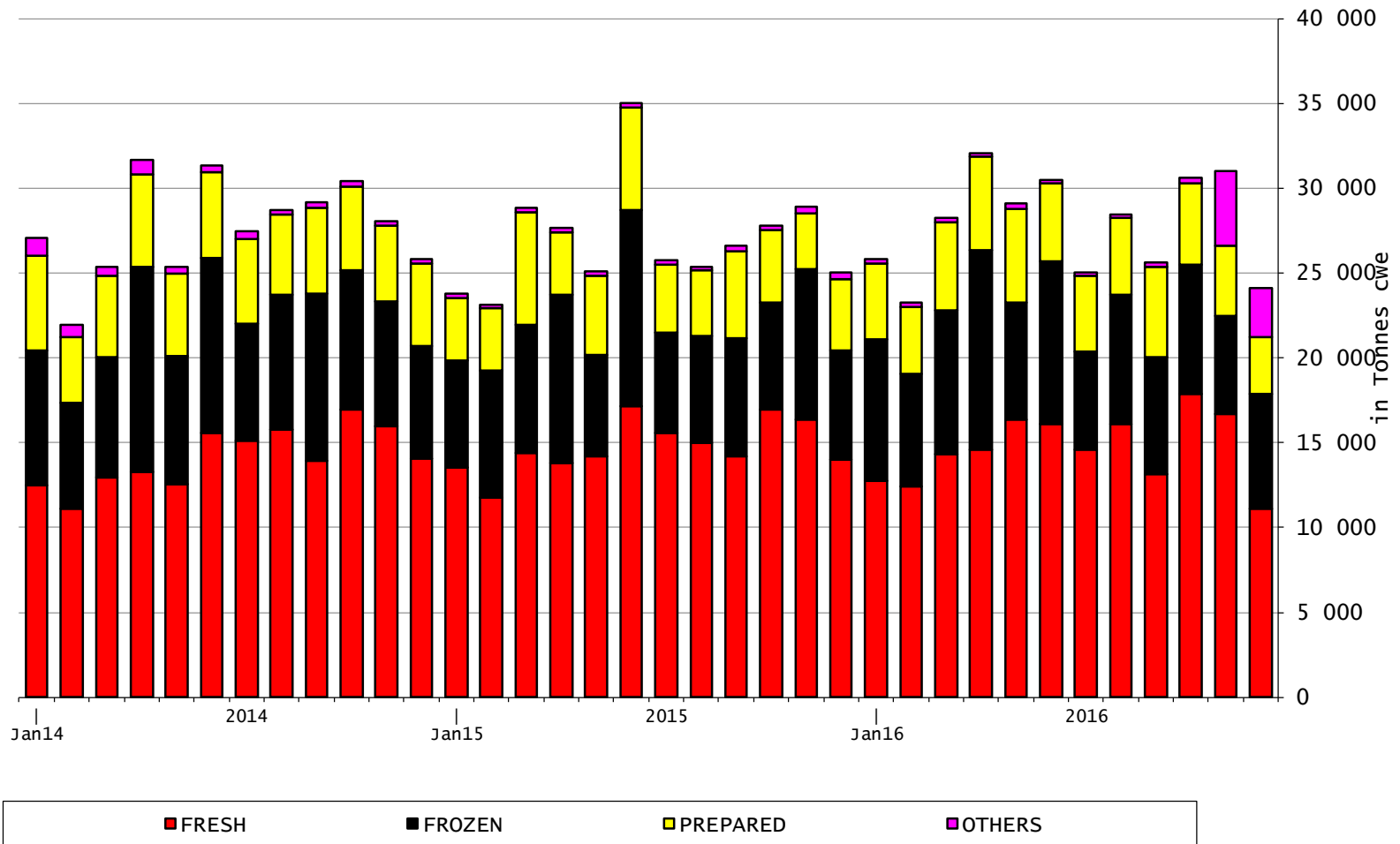


EU imports of beef and live animals (2): Trade figures (COMEXT)





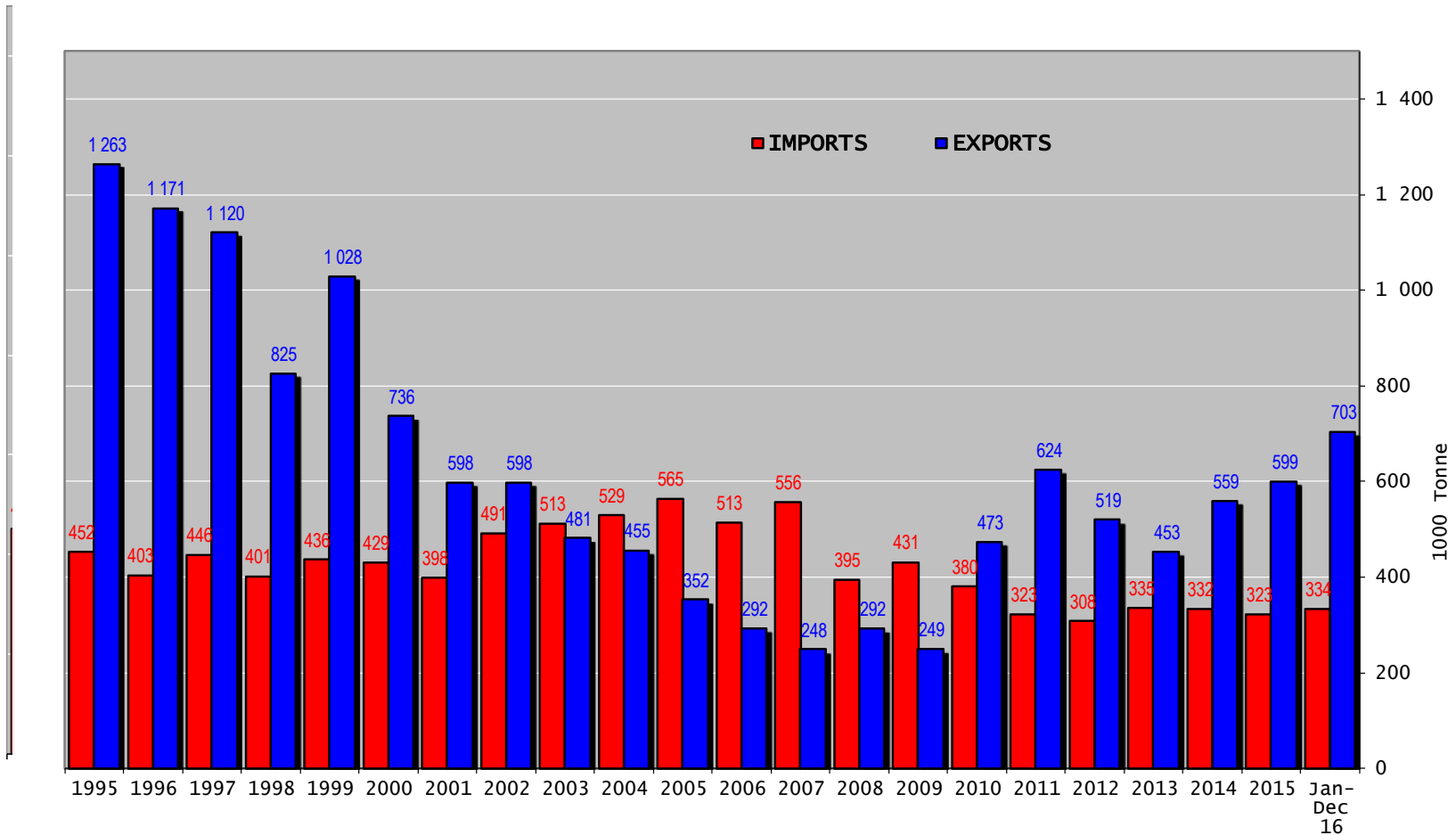
EU-28 Imports of BEEF products



13 March 2017



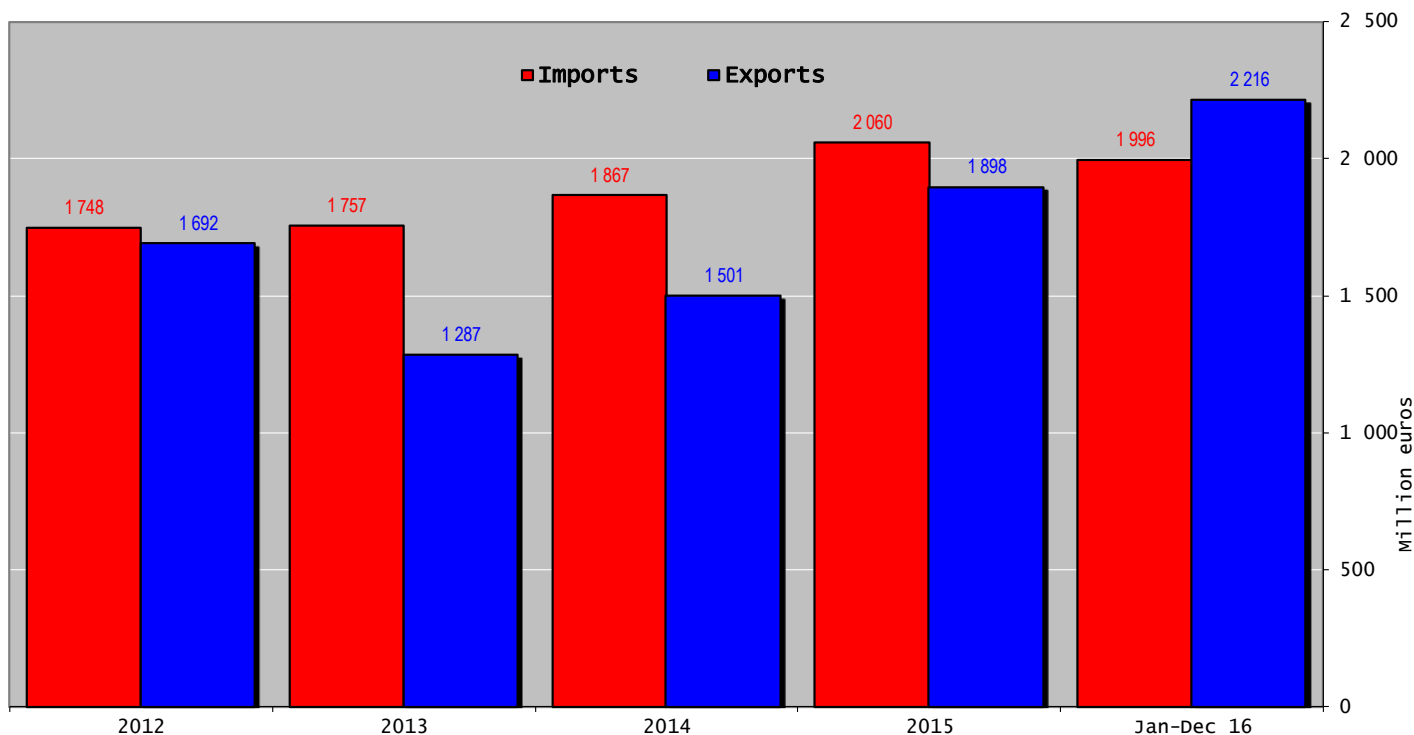
Trade balance of beef and live animals



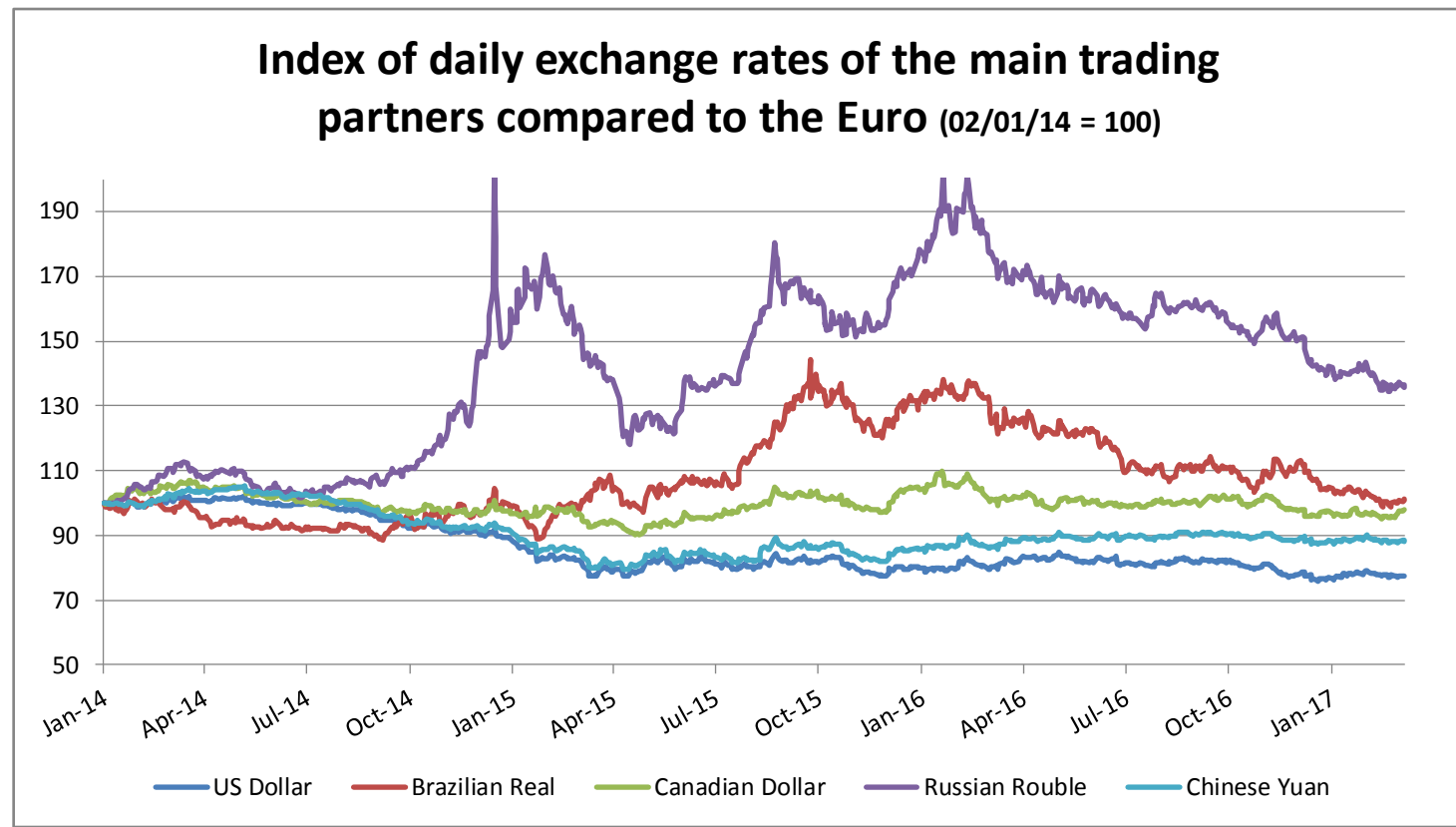
13 March 2017



Trade balance of beef and live animals



13 March 2017

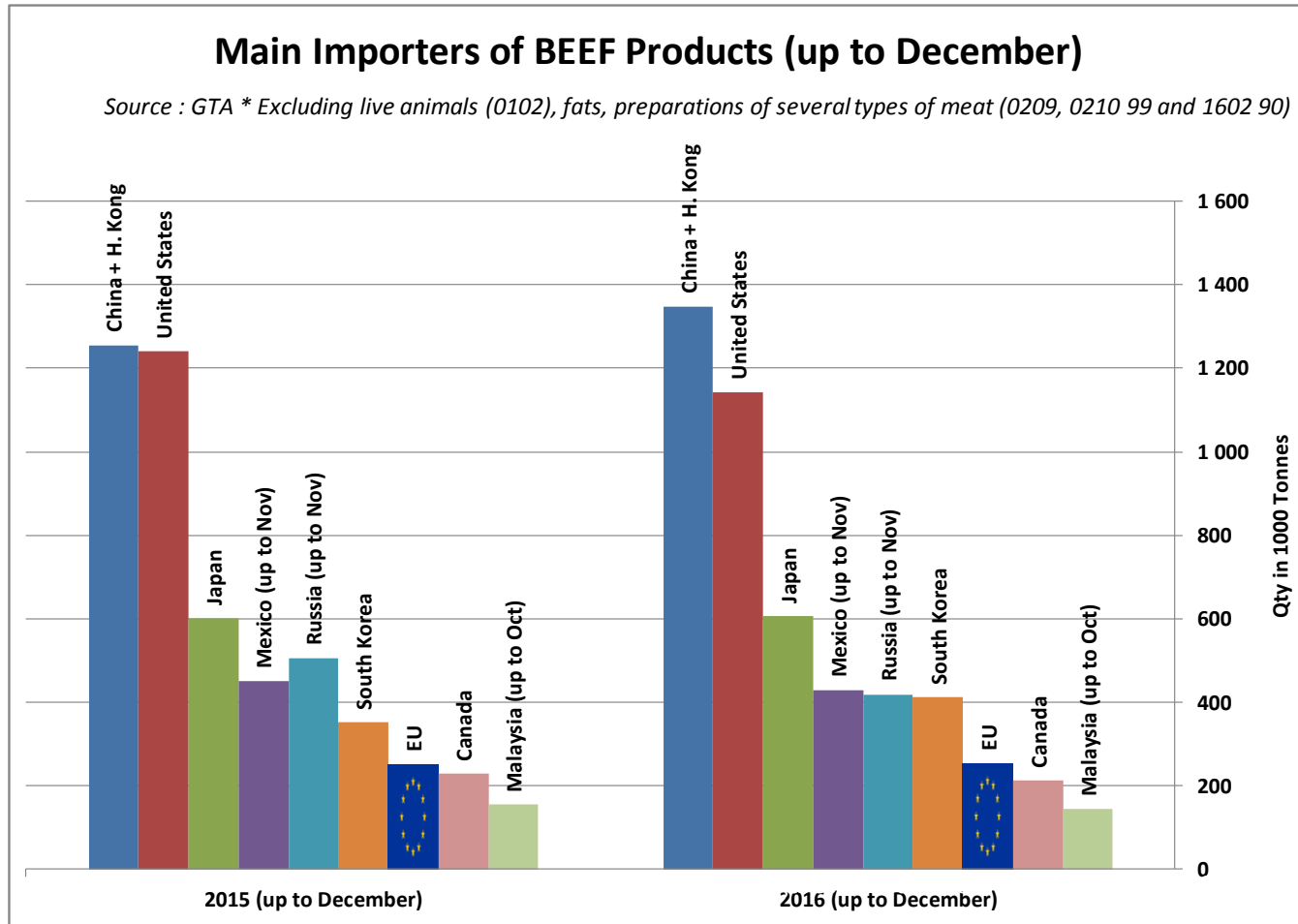


13 March 2017



Source : GTA

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

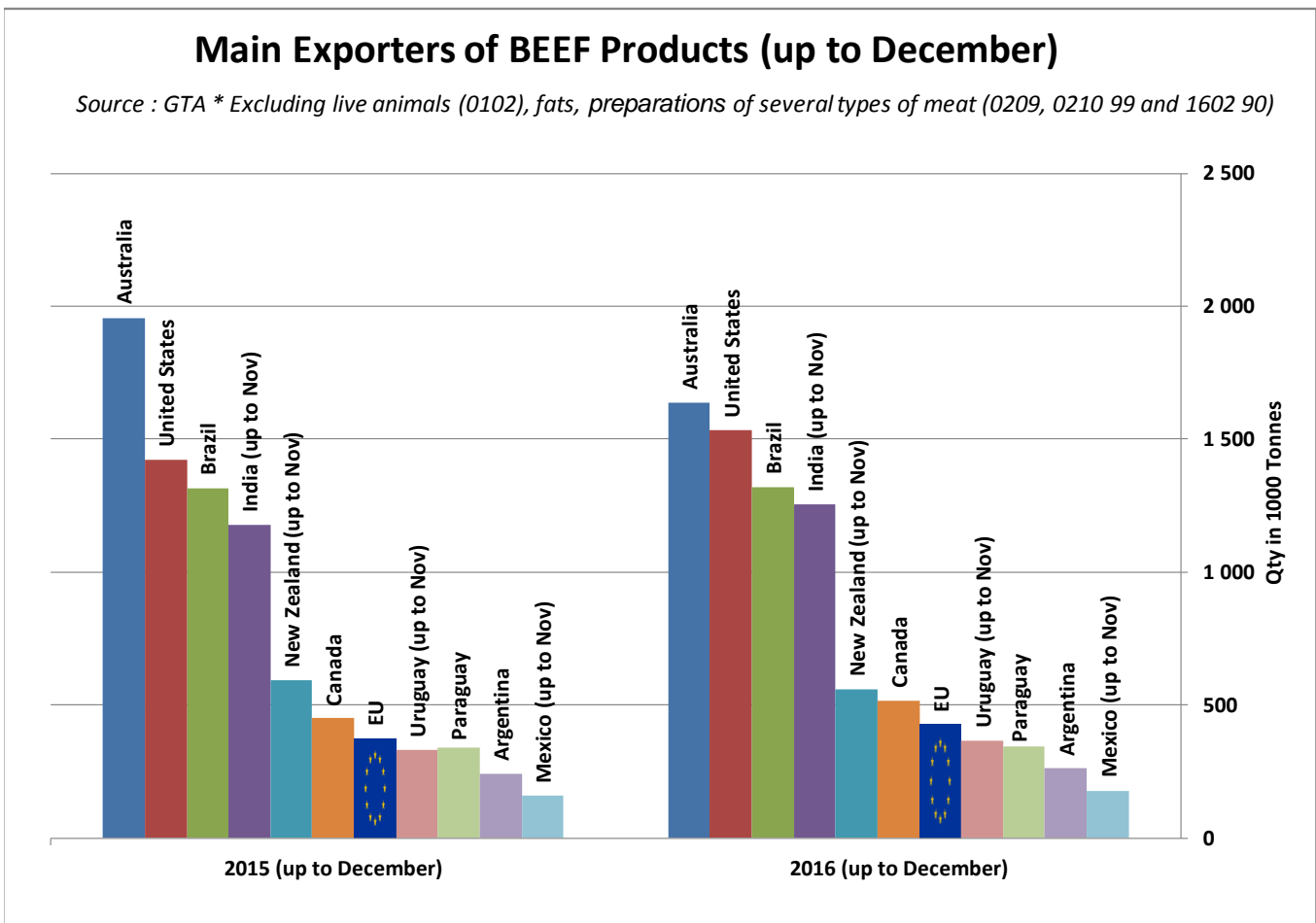


13 March 2017

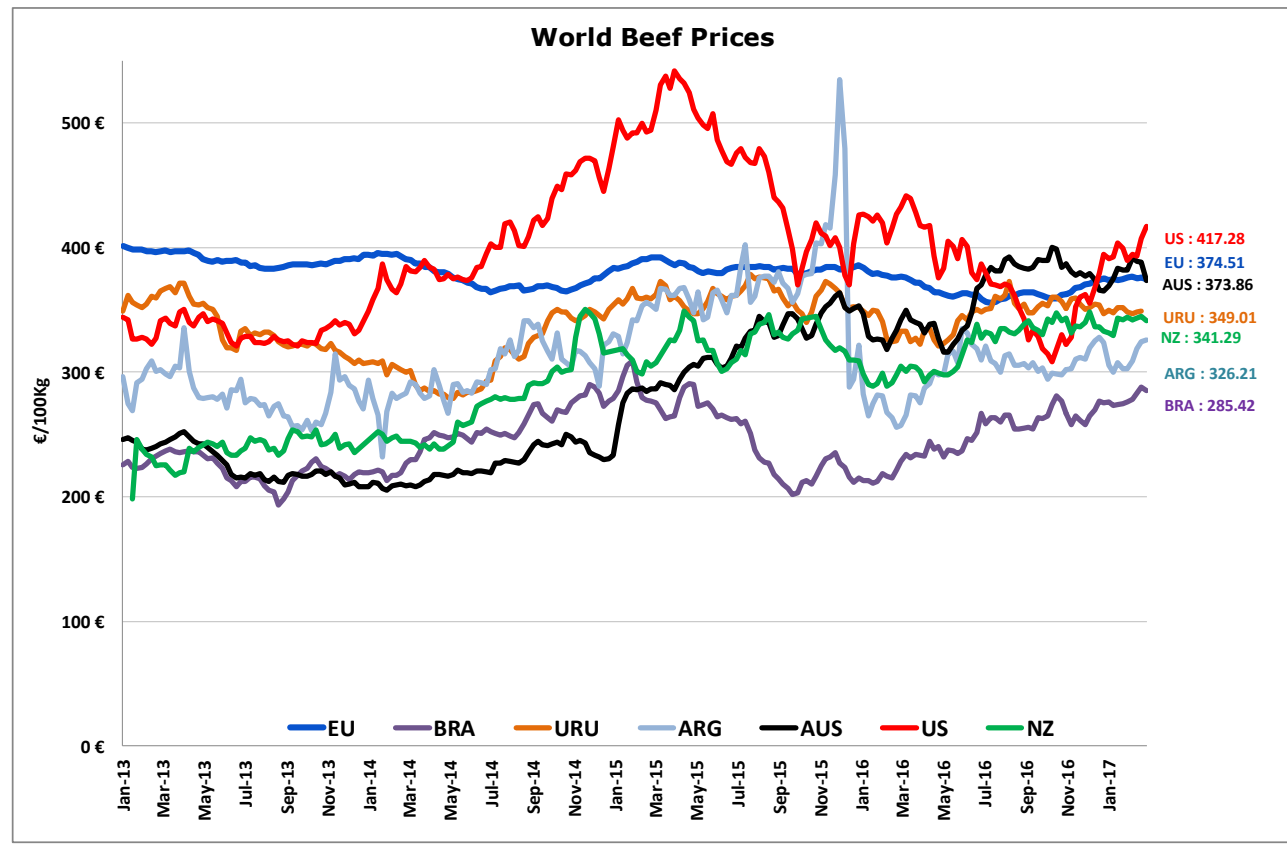


Source : GTA

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



13 March 2017



- ECB <http://sdw.ecb.europa.eu/browse.do?node=2018794>
- US <https://www.marketnews.usda.gov/mnp/ls-home>
- AUS <http://statistics.mla.com.au/Report/RunReport/ae59d4ac-74e4-4c56-93bd-982a044d9760>
- UY <http://www.inac.gub.uy/innovaportal/v/11034/10/innova.front/indicadores-y-precios>
- ARG http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html
- BR <http://www.pecuaria.com.br/cotacoes.php>
- NZ http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html

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High Quality Beef Import Quotas



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%	6.71	3.36%
09.4450	Argentina	29 500	23 663.86	80.22%	22 867.03	77.52%	22 350.61	75.76%	14 875.84	50.43%
09.4451	Australia	7 150	7 138.89	99.84%	6 815.93	95.33%	6 749.85	94.40%	3 061.02	42.81%
09.4452	Uruguay	6 300	6 278.75	99.66%	6 280.98	99.70%	6 249.09	99.19%	4 812.50	76.39%
09.4453	Brazil	10 000	4 078.92	40.79%	7 989.89	79.90%	9 289.17	92.89%	6 846.23	68.46%
09.4454	New Zealand	1 300	1 299.61	99.97%	1 299.45	99.96%	1 299.95	100.00%	747.78	57.52%
09.4002	Canada/US	11 500	431.80	3.75%	353.46	3.07%	292.16	2.54%	352.90	3.07%
09.4455	Paraguay	1 000		0.00%	12.13	1.21%	915.63	91.56%	636.34	63.63%
Total Beef		66 750	42 891.83	64.26%	45 618.87	68.34%	47 146.46	70.63%	31 332.61	46.94%
Total Buffalo		2 450	15.71	0.64%	9.46	0.39%	12.21	0.50%	6.71	0.27%
Total		69 200	42 907.54	62.01%	45 628.33	65.94%	47 158.67	68.15%	31 339.32	45.29%

* up to 31/01/2017

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High Quality Beef Import Quotas



European
Commission
Regulation (EU) No 481/2012

Quota erga omnes

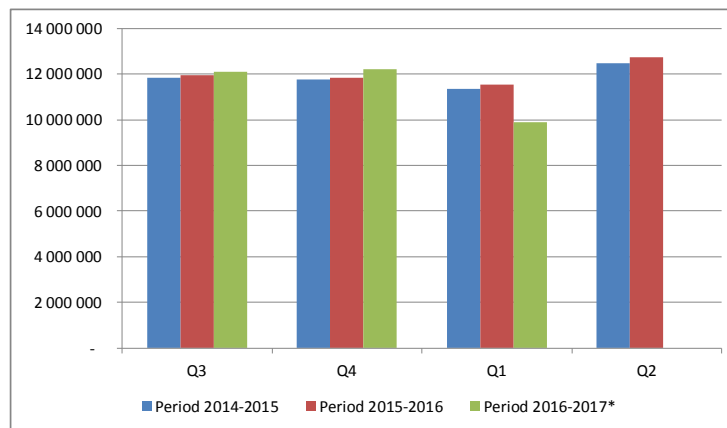
	2013-Q3	2013-Q4	2014-Q1	2014-Q2	TOTAL
Period 2013-2014	10 198 942	10 493 437	10 191 527	10 282 860	41 166 765
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	84.64%	87.08%	84.58%	85.33%	85.41%

	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*	12 092 468	12 197 542	9 885 093	-	34 175 104
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	100.35%	101.22%	82.03%	0.00%	70.90%
Available after transfer	12 050 000	12 007 532	11 859 989	14 024 896	
	100.35%	101.58%	83.35%	0.00%	

* Until 09.03.2017



13 March 2017

Forecast Summary



European
Commission

	2015	2016	2017	2018
EU.15 PRODUCTION (1000T)	+ 2.57% 6 806	+ 2.17% 6 953	- 0.35% 6 929	+ 0.00% 6 940
EU.15 CONSUMPTION (1000T)	+ 1.85% 6 747	+ 0.65% 6 791	- 0.38% 6 765	- 0.52% 6 730
BALANCE	59	163	164	210
EU.13 PRODUCTION (1000T)	+ 12.43% 777	+ 7.17% 833	+ 0.63% 838	+ 1.92% 854
EU.13 CONSUMPTION (1000T)	- 3.26% 417	+ 17.98% 492	- 3.24% 476	- 1.96% 466
BALANCE	360	341	362	388
EU.28 PRODUCTION (1000T)	+ 3.50% 7 583	+ 2.68% 7 786	- 0.25% 7 766	+ 0.36% 7 794
EU.28 CONSUMPTION (1000T)	+ 1.54% 7 163	+ 1.66% 7 282	- 0.58% 7 240	- 0.61% 7 196
BALANCE	420	504	526	598
EU - CARCASS PRICES	2015	2016	2017	2018
ADULT MALE BOVINES (€/100 kg)	+ 3.5% 386.5	- 3.98% 371.1	+ 1.25% 375.8	+ 0.75% 378.6
COWS (€/100 kg)	- 1.1% 283.6	- 5.50% 268.0	+ 1.73% 272.6	+ 0.51% 274.0

Sources : EStat New Cronos, Member States

Agriculture
and Rural
Development

13 March 2017

Annex IV



TRENDS IN SALES OF MEAT PRODUCTS – A RETAIL PERSPECTIVE

Meat Market Observatory
16 March 2017

Belgium

Period ending February 2017

Product category	price (% change February 2017 vs February 2016)	price (% change August 2016 – February 2017 vs August 2015 – February 2016)
Total pigmeat	+3%	+1,71%
Delicatessen (salami, ham, prosciutto, etc)	+0,9%	+0,86%
Processed pork (élaborés de viande)	+0,5%	+1,13%
Total beef and veal	+2,1%	+0,91%

Source: Comeos

France

Period ending February 2017

Product category	volumes (% change year-to-date)	volumes (% change Year-to-year (52 weeks)	value (% change year-to-date)	value (% change Year-to-year (52 weeks)
Fresh beef*	+0,2%	-1,4%	-1,7%	-1,7%
Fresh veal*	+1,3%	-3,2%	-0,1%	-2,8%
Fresh pork*	-3,8%	-2,2%	-3,1%	-2,2%
Delicatessen (salami, ham, prosciutto, etc)	-2,7%	-0,9%	-	-
Frozen beef	-5,5%	-3,7%	-5,7%	-1,7%
Processed (élaborés de viande)	0,5%	-0,4%	0,3%	-0,3%

Source: Kantar Worldpanel

* Excluding minced meat and wholesale purchases

France

Focus on delicatessen in 2016

Value of delicatessen market (mass food retail) : 6,04 Mrd€ (-0,7%) / volume : -1,8%

Le jambon cuit poursuit sa chute

	CA en M €	Évolution vs A-1 en %					
1	Jambon cuit et épaule	1 514,27	-2,4 ↓	7	Saucisse fraîche	382,99	= →
2	Saucisson et saucisse sèche	728,04	+1,4 ↑	8	Frais emballé charcuterie	363,60	+2,3 ↑
3	Saucisserie	704,18	-0,7 ↓	9	Foie gras frais	290,09	-2,2 ↓
4	Aide culinaire	645,57	+0,1 ↑	10	Pâté et produits à base de tête	160,40	-2,3 ↓
5	Charcuterie tranchée	499,99	+0,8 ↑	11	Rillettes fraîches	155,30	-3,0 ↓
6	Jambon cru	430,64	-1,2 ↓	12	Rôti de porc et autres salaisons	118,46	+0,7 ↑
				13	Charcuterie à réchauffer	52,68	-5,2 ↓

Répartition du chiffre d'affaires par segments de la charcuterie LS et évolution

Retailer brands are losing market share

VALEUR

- 46,2% MDD (-0,6 point)
- 12,6% Fleury Michon (-0,2 point)
- 11,9% Herta (+0,4 point)

VOLUME

- 52,4% MDD (-0,3 point)
- 12% Herta (+0,4 point)
- 8,3% Fleury Michon (-0,1 point)

Malgré leur part importante du marché, les MDD accusent une baisse des ventes, à la fois en valeur et en volume, et perdent du terrain. Fleury Michon et Herta se disputent la deuxième place.

Source: IRI via LSA

France

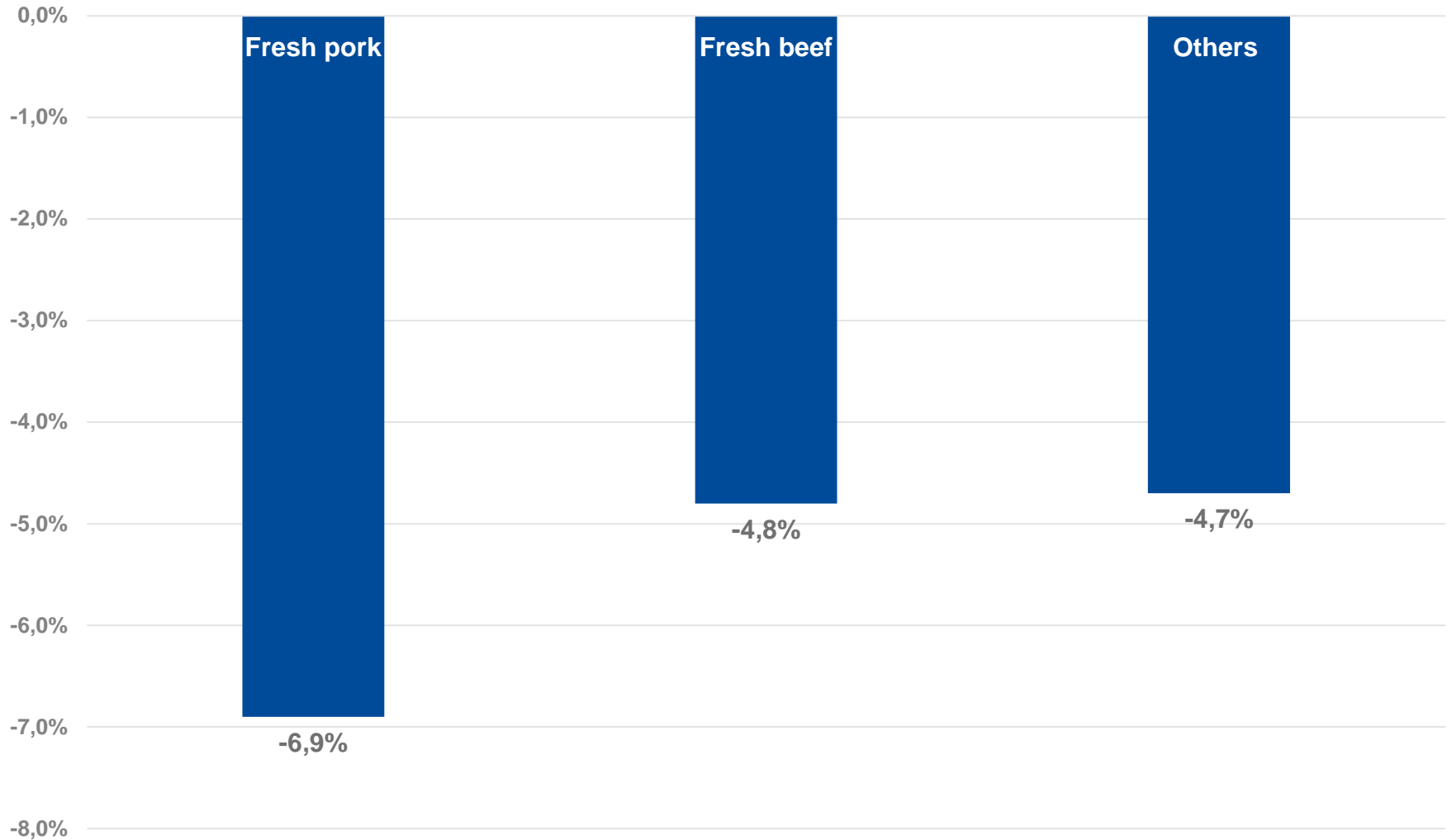
- **96% of the French consumers claimed that they plan to maintain or increase the consumption of organic products; (*Agence BIO survey*)**
- **29% of French consumers intend to increase it: 46% of them want to eat more organic beef and veal, 39% want more organic pork, lamb and charcuterie**



http://www.agencebio.org/sites/default/files/upload/documents/5_Communication/Relations_Presse/dp_bio_barometre_val.pdf

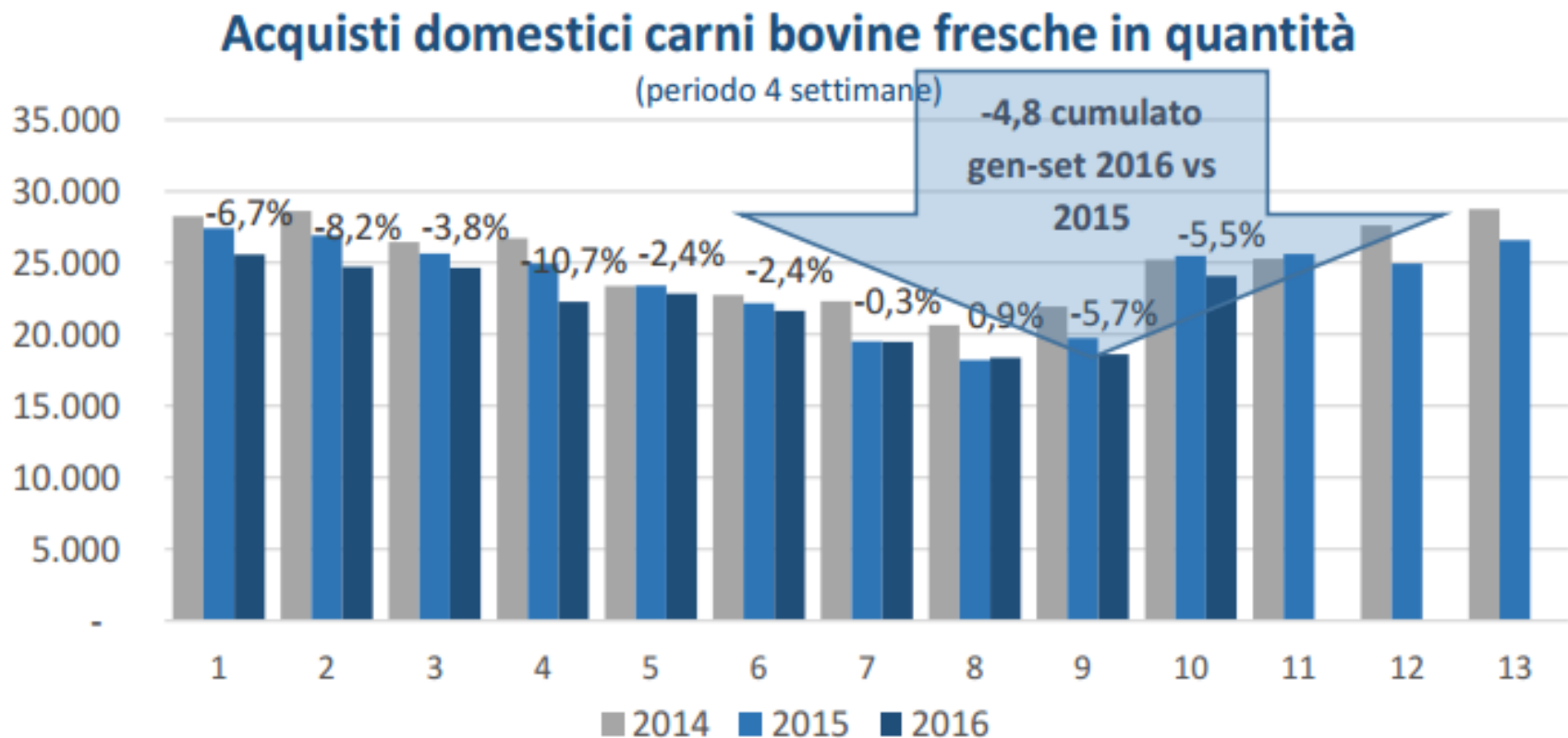
Italy: variation of household purchases of meat

(volumes, first 9 months of 2016 vs 2015)



Source: <http://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/7281>

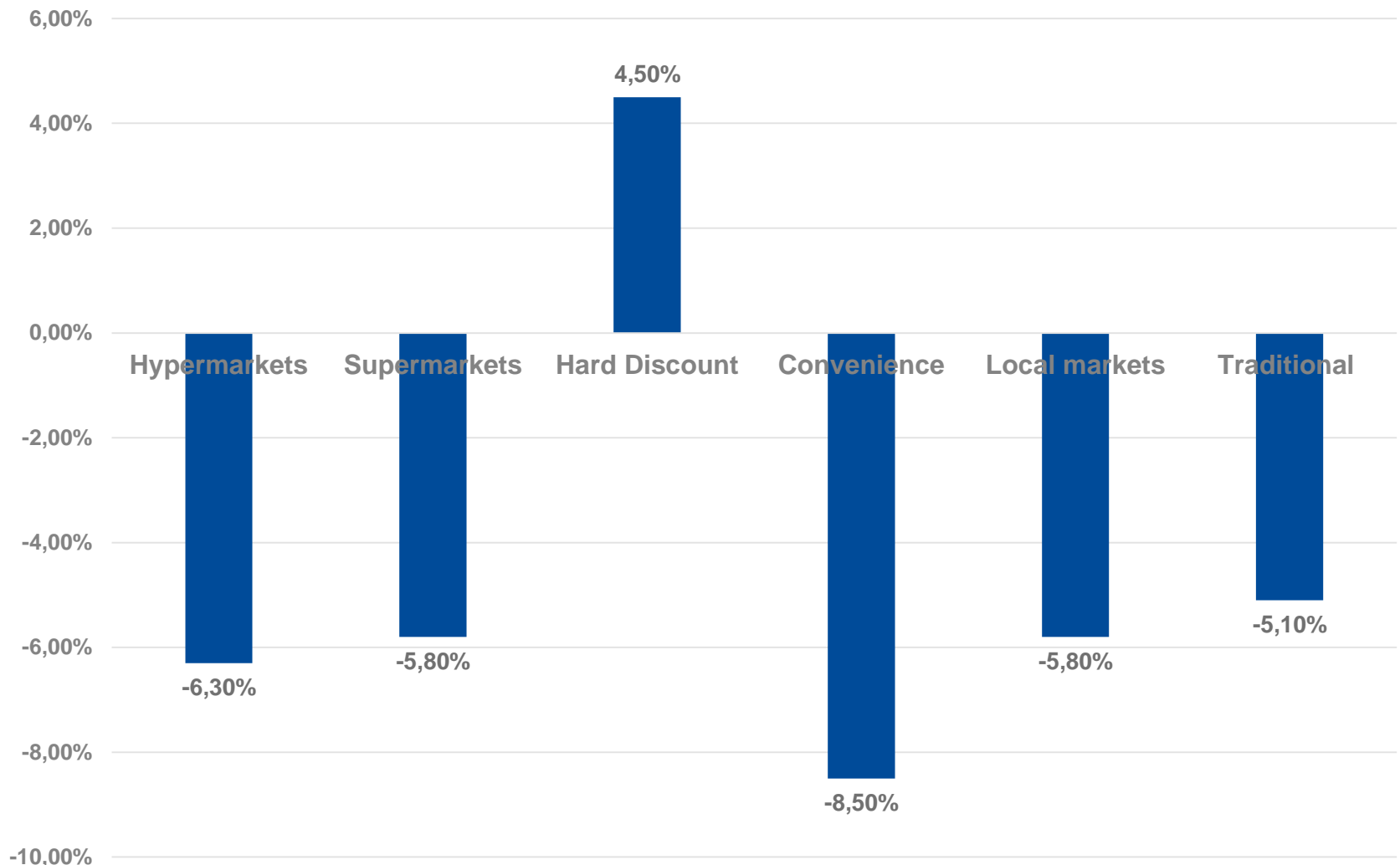
Italy: Household purchases of fresh beef*



Fonte: elaborazione Ismea su dati Nielsen Consumer Panel

Italy: variation of fresh beef purchases across retail store categories

(volumes, first nine months of 2016 vs 2015)



-10,00%

Source: <http://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/7281>

Spain

Product category	Volumes (% change December 2015-November 2016 vs 2014- 2015)	Volumes (% change November 2016 vs November 2015)	Value (% change December 2015 – November 2016 vs 2014-2015)	Value (% change November 2016 vs November 2015)
Total meat	-1,7%	+1,8%	-4,2%	+2,2%
Pork	-3,3%	+1,4%	-8,8%	
Beef	-3,2%	-4,5%	-3,7%	
Frozen	-4,8%	-5,7%	-14,2%	
Processed (élaborés de viande)	-1,3%	+6,6%	-1,8%	

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

United Kingdom: beef

Period ending **29th January 2017**

	4 weeks ended: 29th January 2017	12 weeks ended: 29th January 2017	52 weeks ended: 29th January 2017
Fresh & Frozen Beef			
Expenditure (£ million)	191,8	561,9	2.168,5
annual change %	+1,6	+0,7	+0,0
Volume (tonnes)	25.119	73.386	283.073
annual change %	+4,2	+3,2	+2,9
Average price (£/kg)	7,64	7,66	7,66
Annual volume change %			
	4 weeks ended: 29th January 2017	12 weeks ended: 29th January 2017	52 weeks ended: 29th January 2017
Fresh & frozen beef	+4,2	+3,2	+2,9
- Roasting	+11,1	-4,6	-3,7
- Stewing	+5,5	+3,5	+6,3
- Frying/grilling steak	+6,8	+10,3	+5,8
- Mince	+1,9	+5,6	+3,8
- Marinade	-5,1	+0,4	+3,1
Burgers and grills	-3,7	+0,3	+0,4
Chilled ready meals	-1,6	+7,3	+2,8
Frozen ready meals	-15,0	-6,2	-7,0
Fresh pre-packed hot pies	-5,7	+4,1	+1,6
Fresh pre-packed pasties	-12,2	-5,6	-0,5
Frozen pies/puddings	+8,3	-2,5	-10,7

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

United Kingdom: pigmeat

Period ending	29th January 2017		
	4 weeks ended:	12 weeks ended:	52 weeks ended:
	29th January 2017	29th January 2017	29th January 2017
Fresh & Frozen Pork			
Expenditure (£ million)	61,6	173,3	723,6
annual change %	-2,7	-3,8	-8,8
Volume (tonnes)	13.662	37.899	162.512
annual change %	-2,8	-3,1	-3,0
Average price (£/kg)	4,51	4,57	4,45
Annual volume change %			
	4 weeks ended:	12 weeks ended:	52 weeks ended:
	29th January 2017	29th January 2017	29th January 2017
Fresh & frozen pork	-2,8	-3,1	-3,0
- Belly	+16,5	+7,4	-1,0
- Chops/Steaks	-3,3	-1,8	-2,0
- Leg Roasting Joint	-7,8	+6,8	+1,6
- Loin Roasting	-10,6	-14,4	-6,1
- Shoulder Roasting Joint	-4,3	-13,0	-5,0
- Marinades	-22,6	-28,8	-11,5
- Pork Ribs	-4,4	-6,8	-14,2
- Mince	+7,8	+5,8	-5,2
Bacon	+5,2	+3,9	+1,4
Pork Sausages	-0,7	+3,4	-0,2
Fresh PP Pork Pies	-11,2	-2,1	+1,4
Fresh PP Sausage Rolls	+2,2	+4,3	+2,0
Pork Sliced Cooked Meats (incl Ham)	+1,0	+0,9	-1,5
Ready Meals (chilled)	+4,4	+8,8	+3,9

United Kingdom – meat purchases

Annual percentage change in retail meat purchases (12 weeks to 29 January 2017)

