



SHEEP / GOAT CIVIL DIALOGUE GROUP

Market Situation for Sheep & Goats

13 November 2018



Production

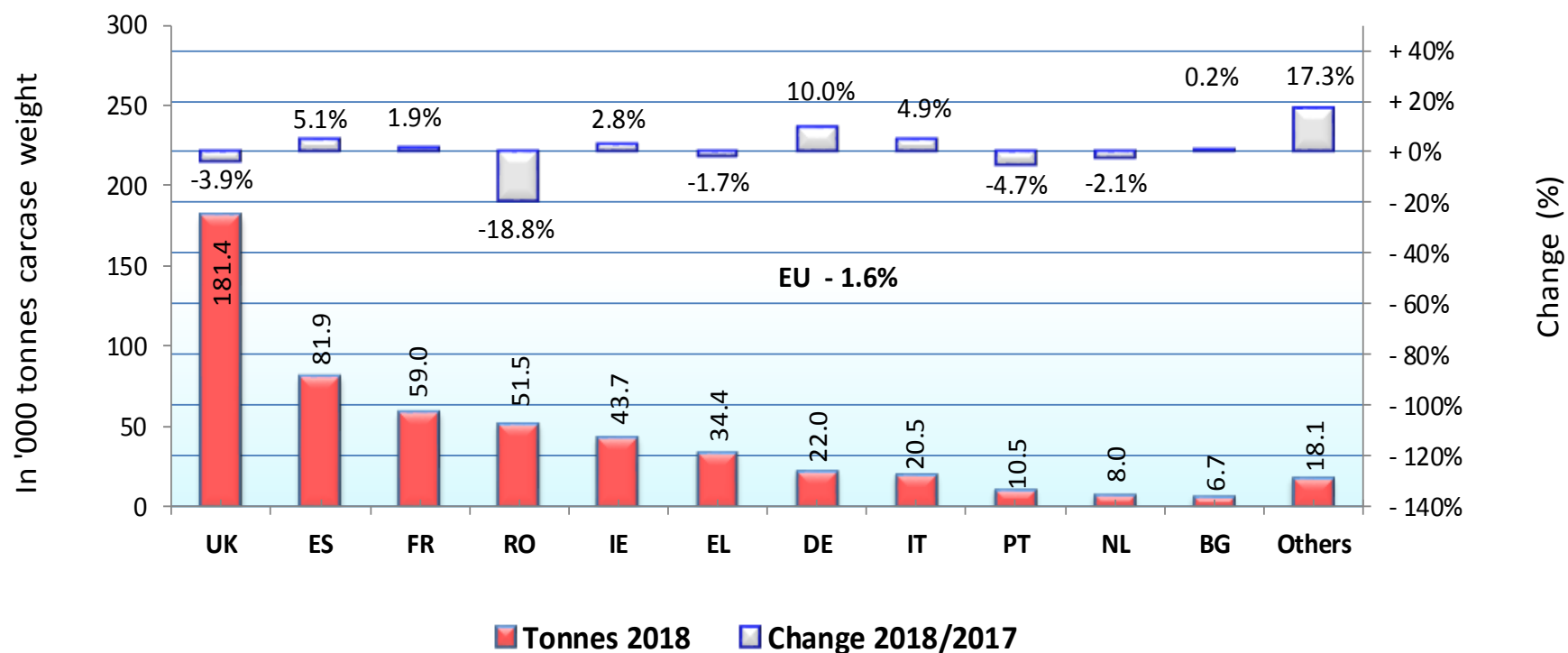
Farm Structure Survey



Change in number of sheep and holdings



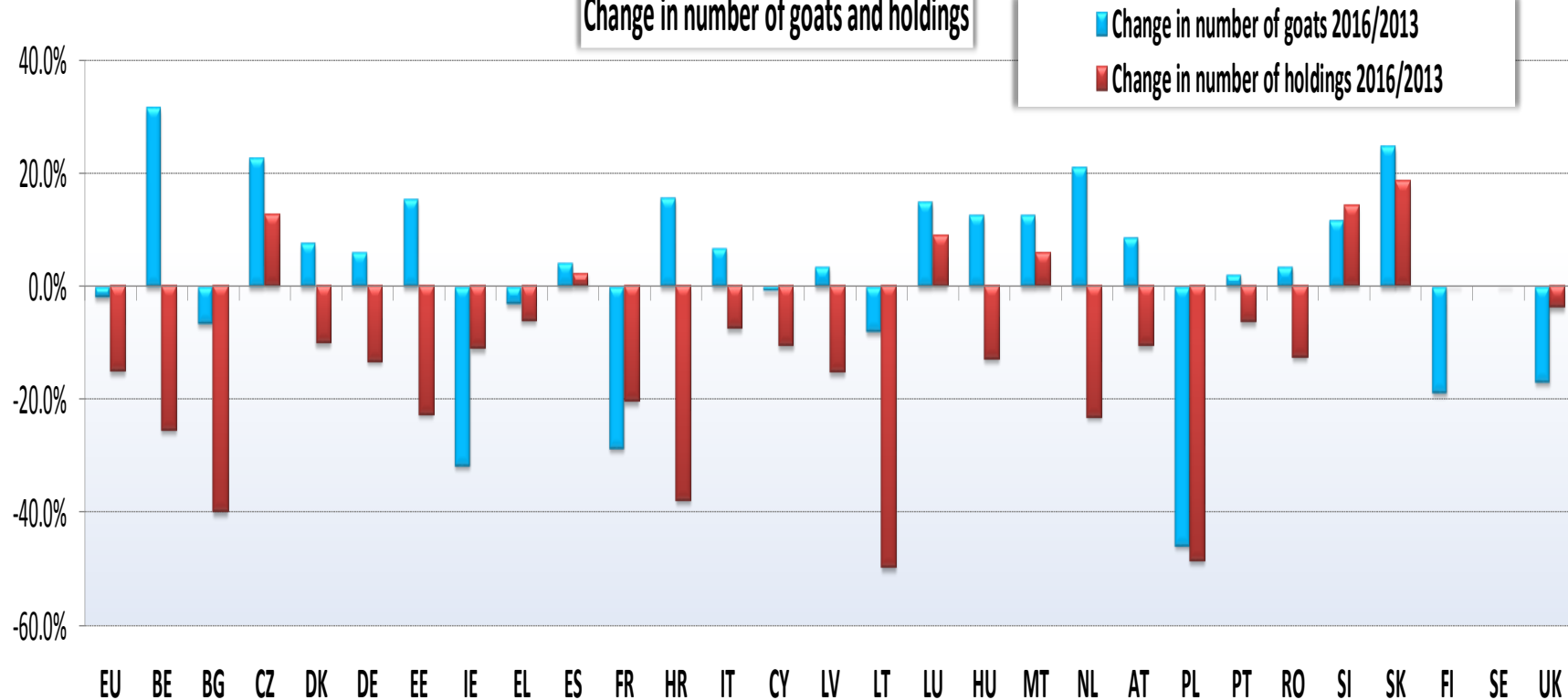
Sheep slaughtering for EU 2018/2017 (up to August)



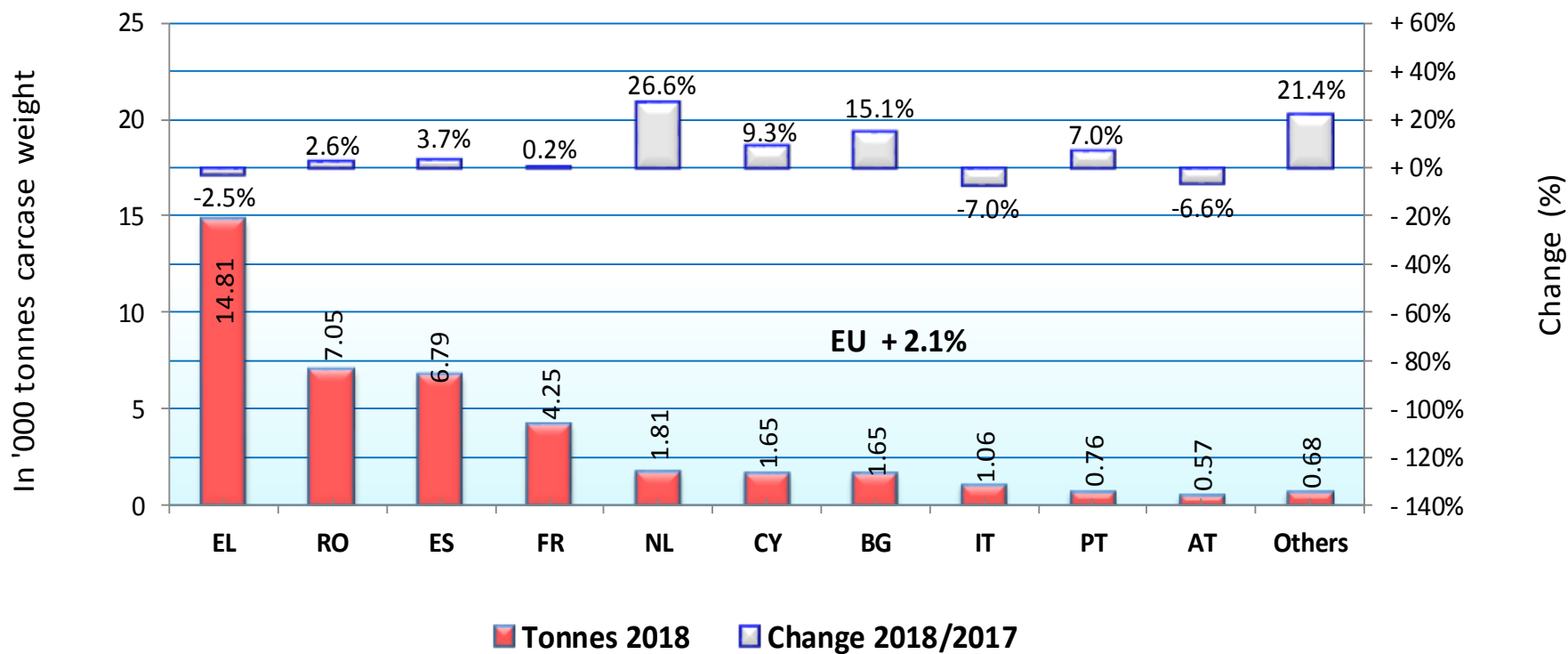
Farm Structure Survey



Change in number of goats and holdings



Goat slaughtering for EU 2018/2017 (up to August)



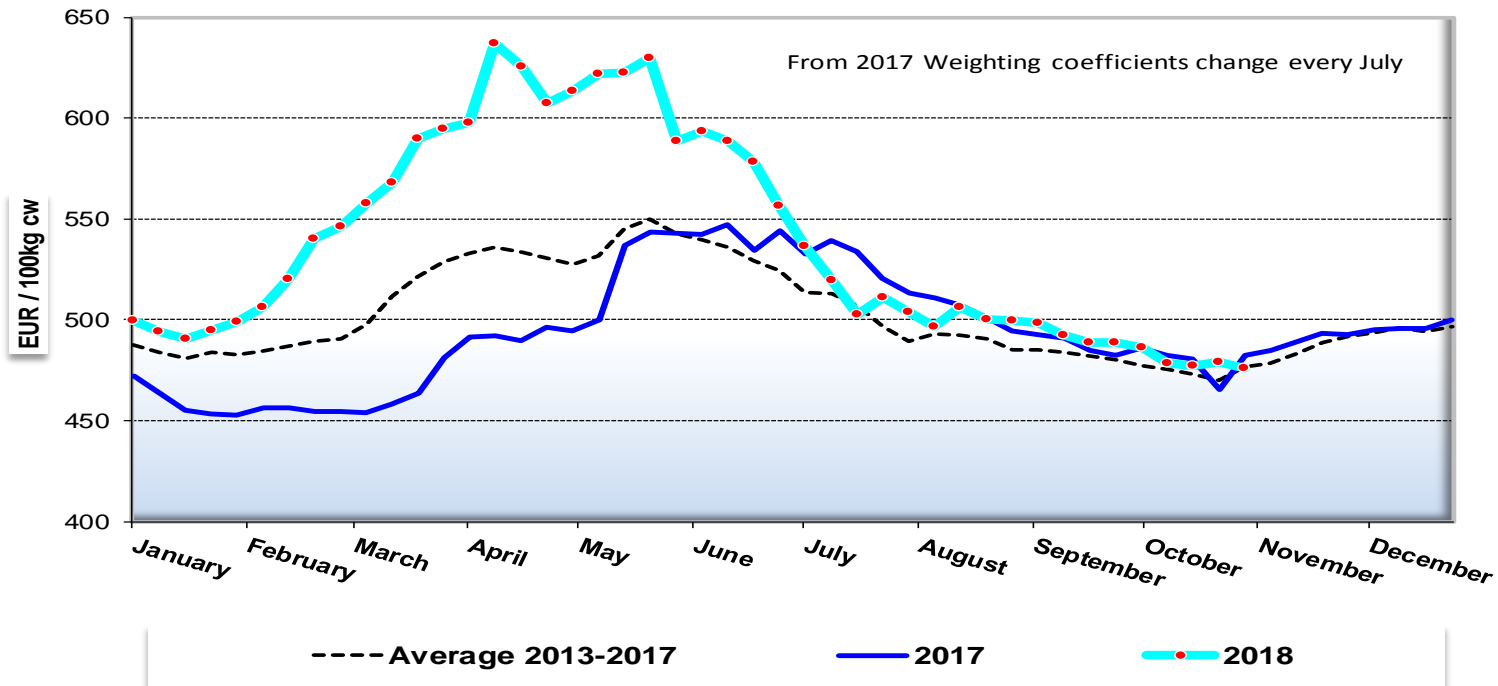


Prices



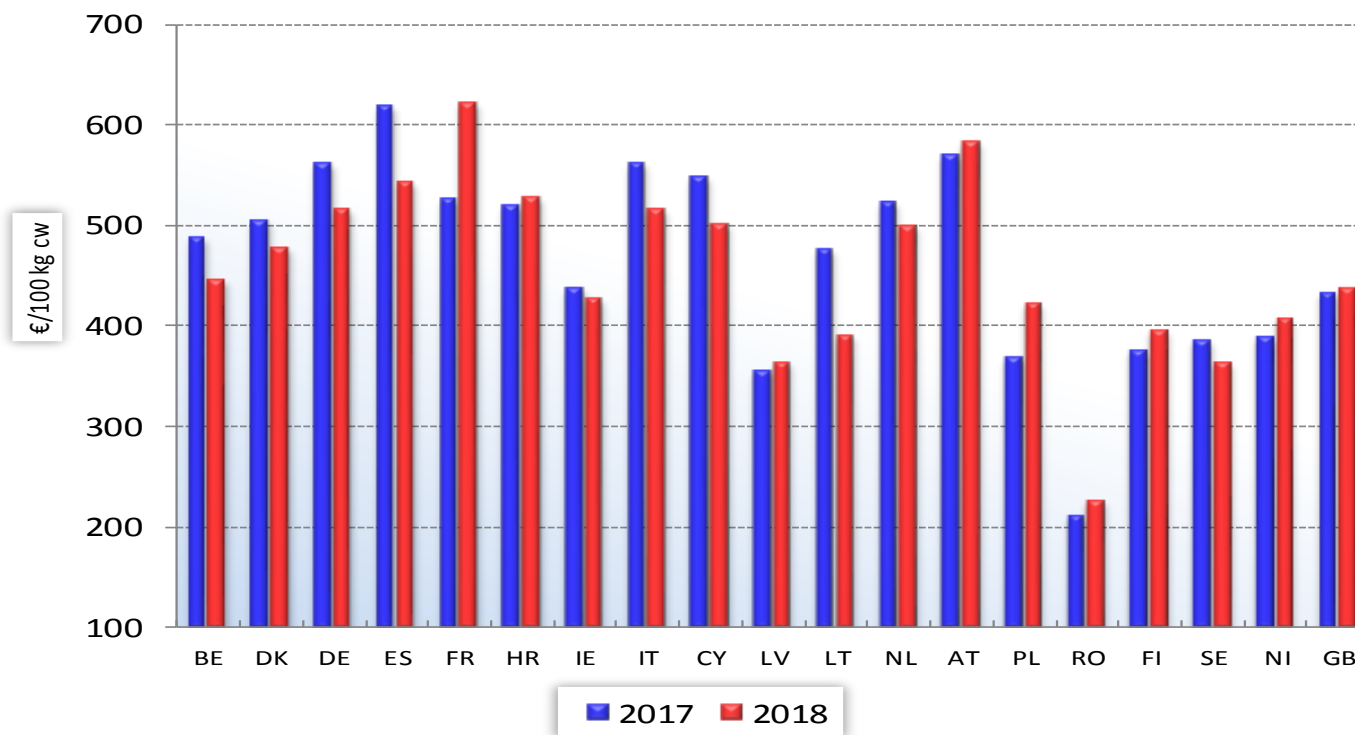
Evolution of **heavy** lamb prices in the EU

Latest price ==> 475.93 EUR/100 kg





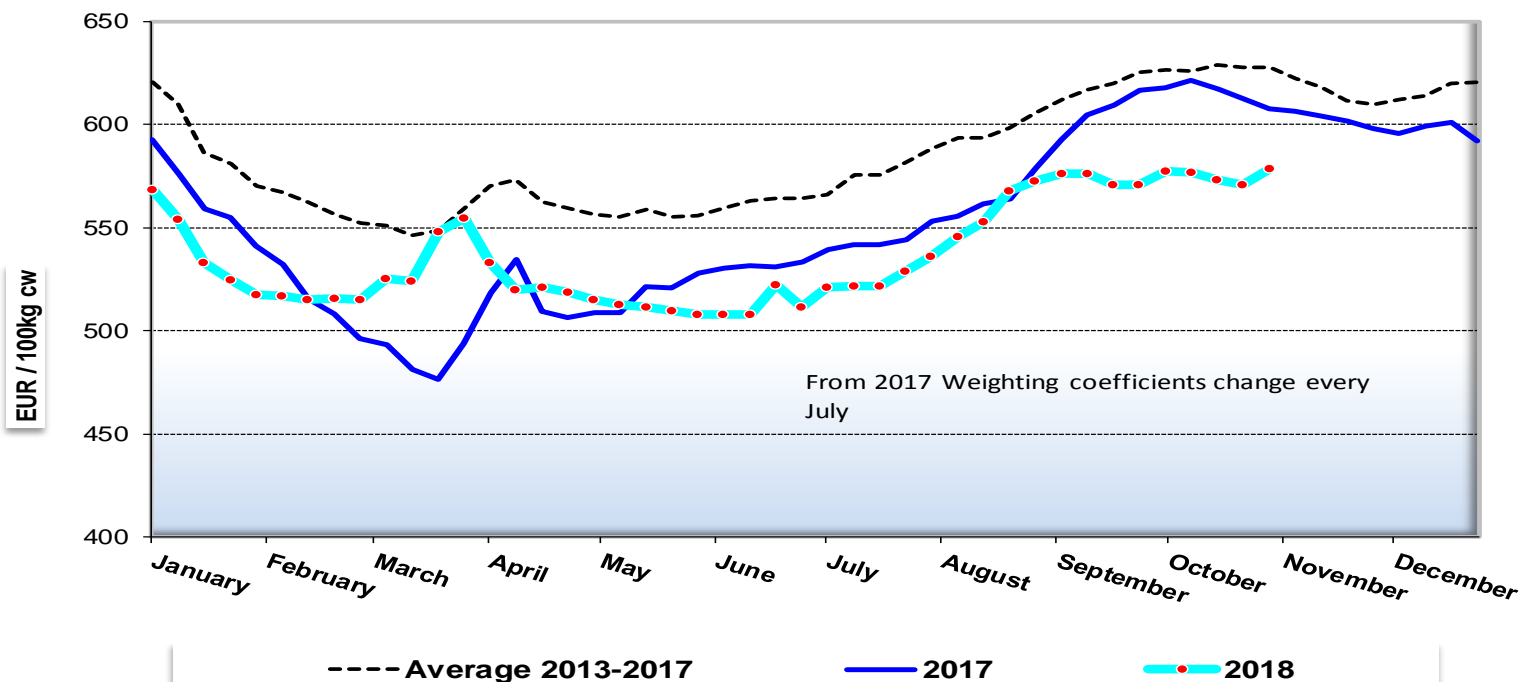
**Heavy lamb prices
week 43**





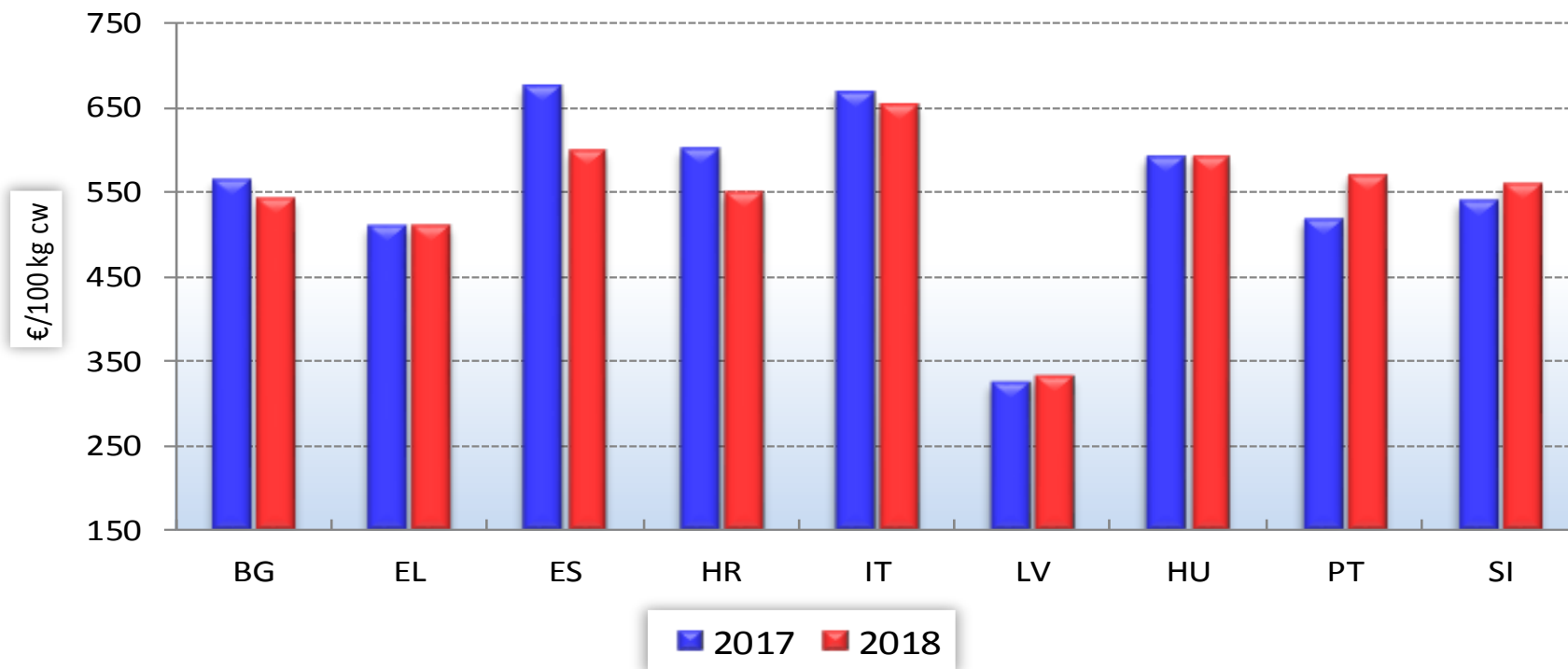
Evolution of **light** lamb prices in the EU

Latest price ==> 578.48 EUR/100 kg

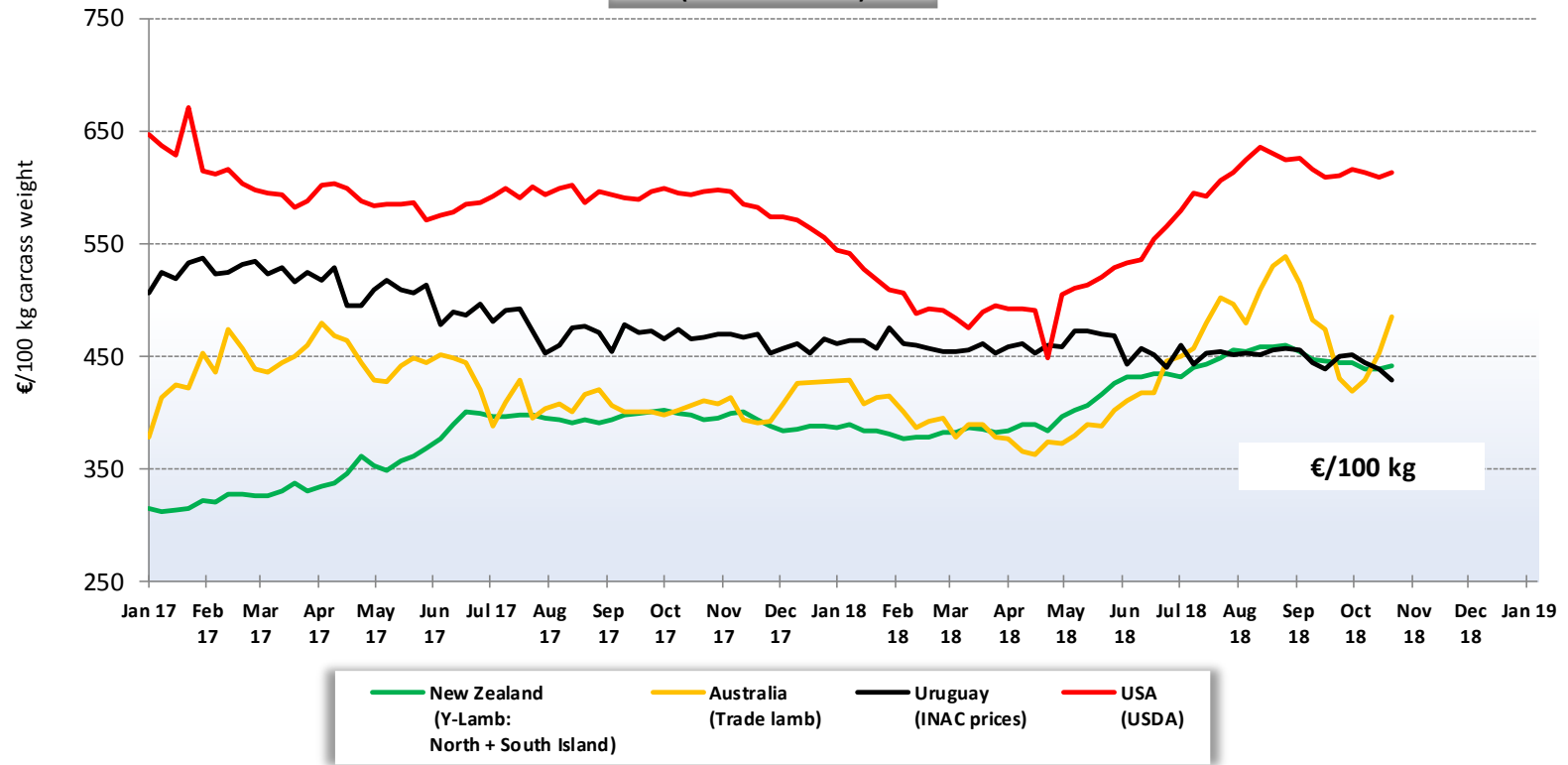




Light lamb prices week 43



World Market Prices (Lamb carcasses)



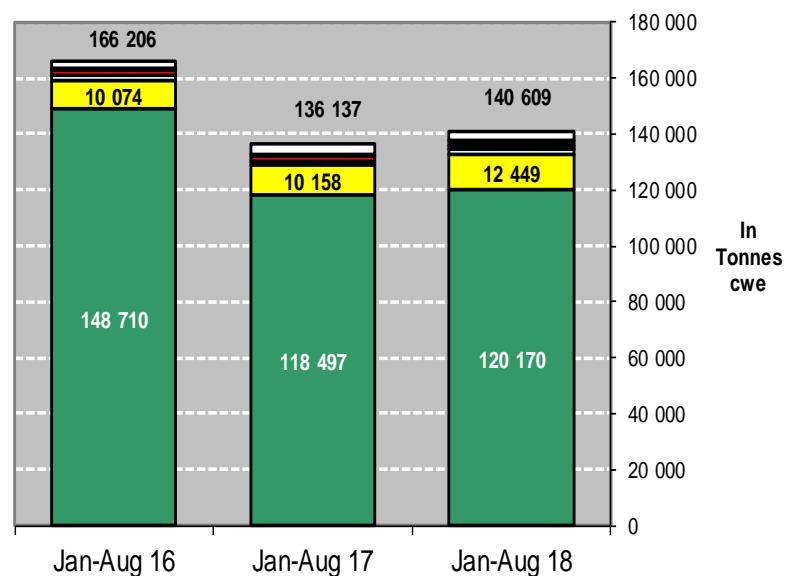


Trade

EU imports of sheep & goatmeat and live animals

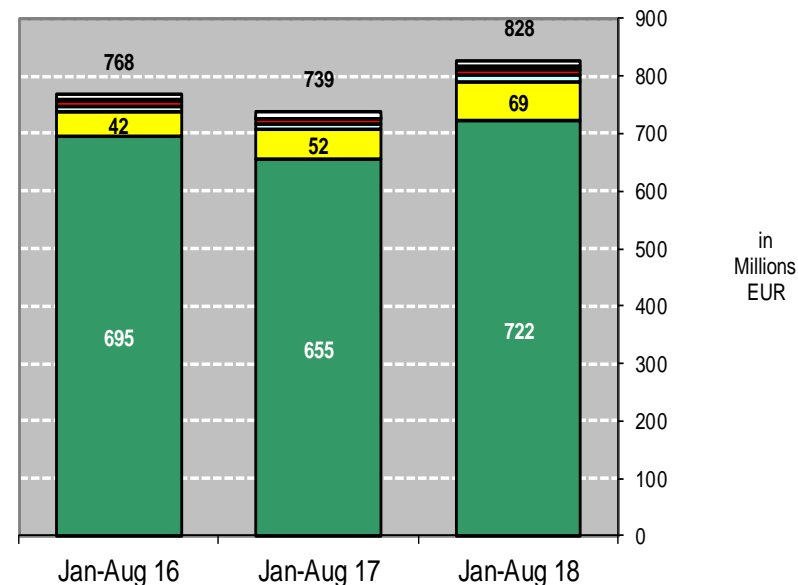
Trade figures (COMEXT)

EU IMPORTS of Sheep & Goat (Tonnes cwe)



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

EU IMPORTS of Sheep & Goat (Millions EUR)



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

UTILISATION OF SHEEPMEAT AND GOATMEAT DG AGRI TARIFF QUOTAS IN 2018

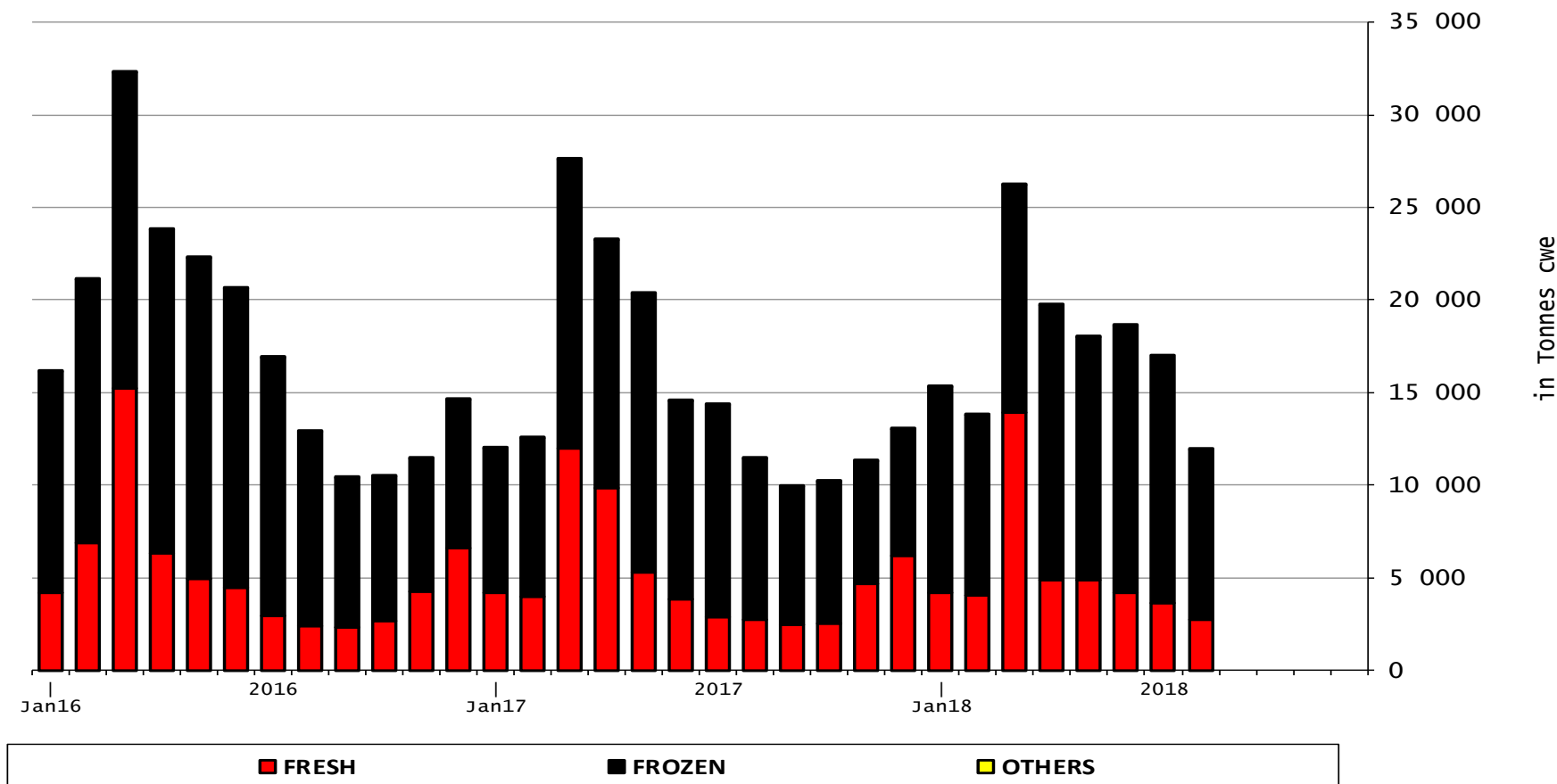
EU-28 : **January > December 2018**

Reg. 2018/1232

| COUNTRY GROUP No | CN CODES | ORIGIN | Period: 01/01/2018 - 29/10/2018 Unit: tonnes cwe | | | | |
|---------------------|--|-------------|---|----------------------------------|----------------|-------------|---------------------------------------|
| | | | Annual quota | Balance (remaining amount) | Actual import | Quota use % | Period: 01/01/2017 - 31/12/2017 |
| 1 | 0204 | Argentina | 23 000 | 21 633 | 1 367 | 6% | 703 |
| | | Australia | 19 186 | 5 897 | 13 289 | 69% | 19 186 |
| | | New Zealand | 228 389 | 102 494 | 125 895 | 55% | 142 204 |
| | | Uruguay | 5 800 | 5 270 | 530 | 9% | 1 813 |
| | | Chile | 8 000 | 5 991 | 2 009 | 25% | 2 031 |
| | | Greenland | 100 | 100 | 0 | 0% | 0 |
| | | Faeroes | 20 | 20 | 1 | 3% | 1 |
| | | Turkey | 200 | 200 | 0 | 0% | 0 |
| | | Others | 200 | 7 | 193 | 96% | 200 |
| | | Erga Omnes | 200 | 0 | 200 | 100% | 197 |
| 2 | 0104 10 30 0104 10 80 0104 20 90 | Erga Omnes | 92 | 92 | 0 | 0% | 0 |
| TOTAL | | | 285 187 | 141 703 | 143 484 | 50% | 166 335 |

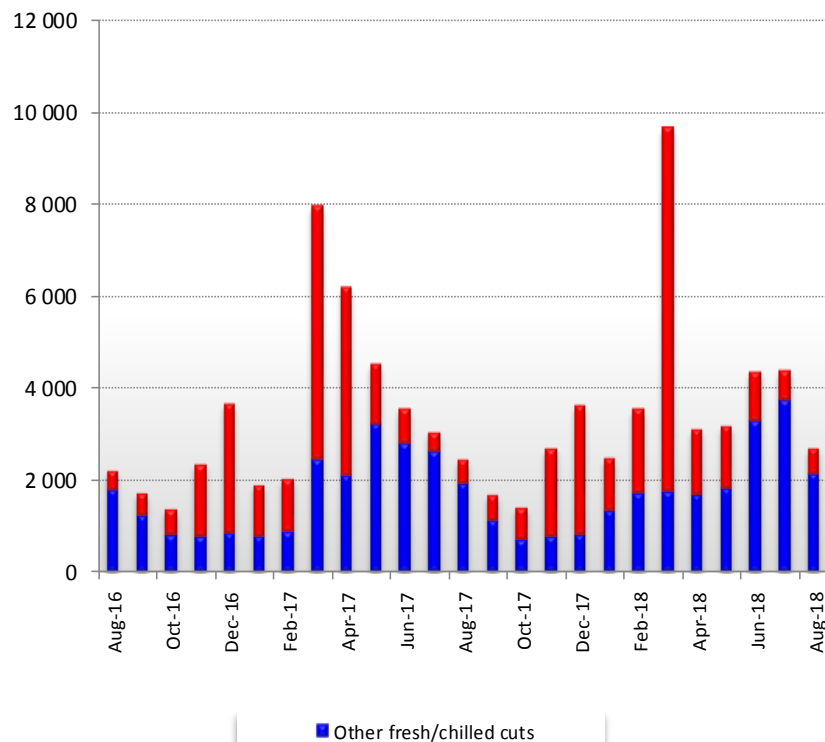


EU Imports of Sheep and Goat products

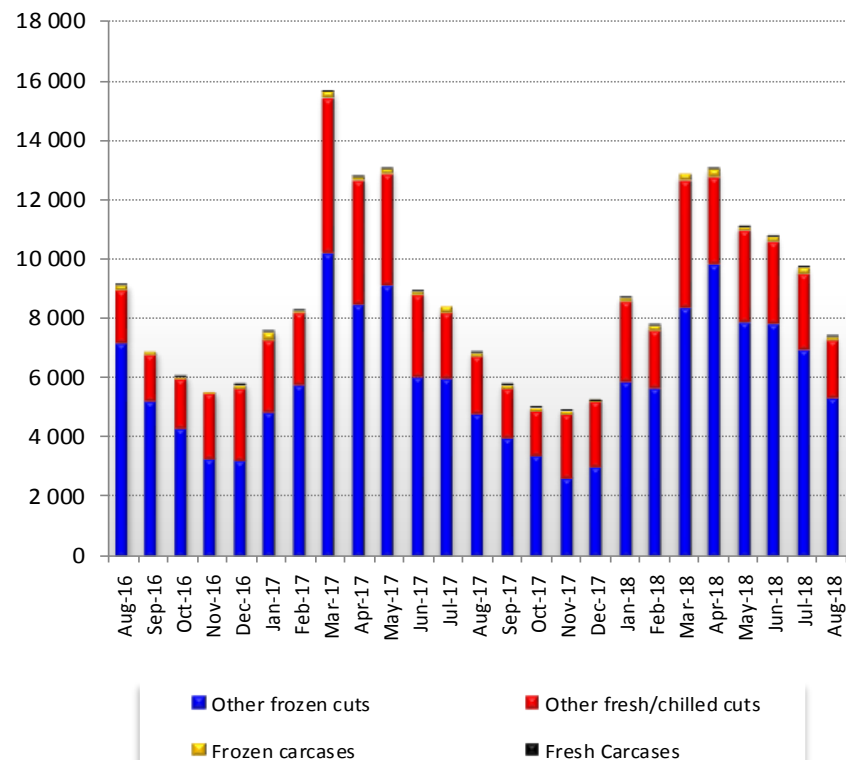


Evolution NZ Exports of sheep meat products in EU (in cw)

Sheep legs



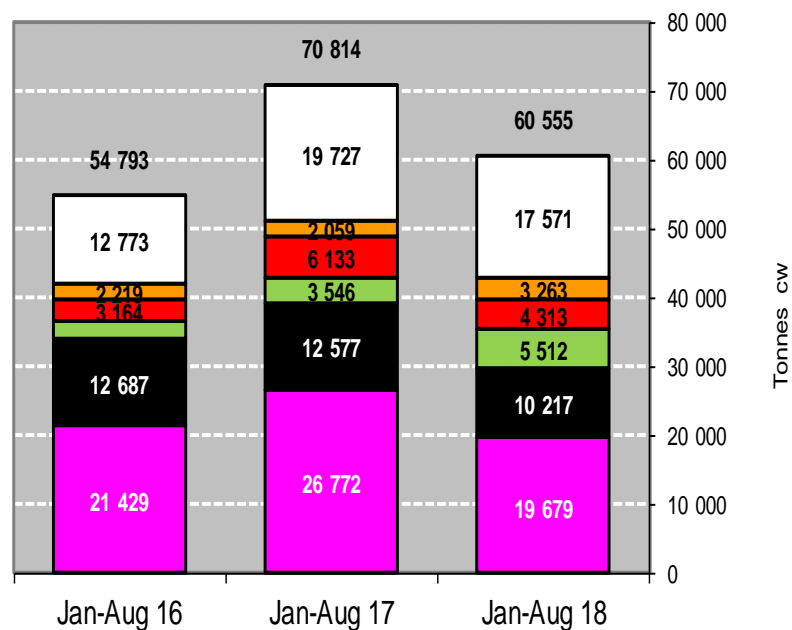
Other meat products



EU exports of sheep & goatmeat and live animals

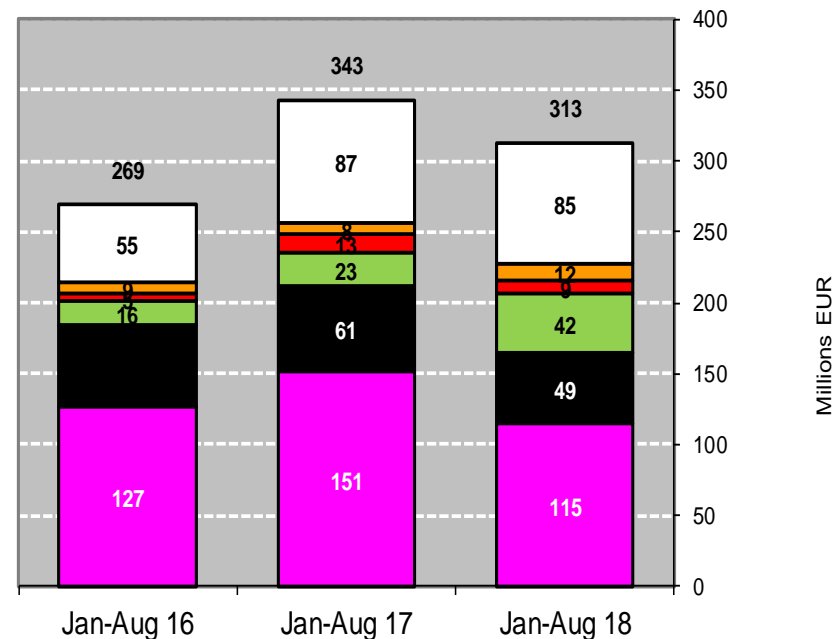
Trade figures (COMEXT)

EU EXPORTS of Sheep & Goat (Tonnes cwe)



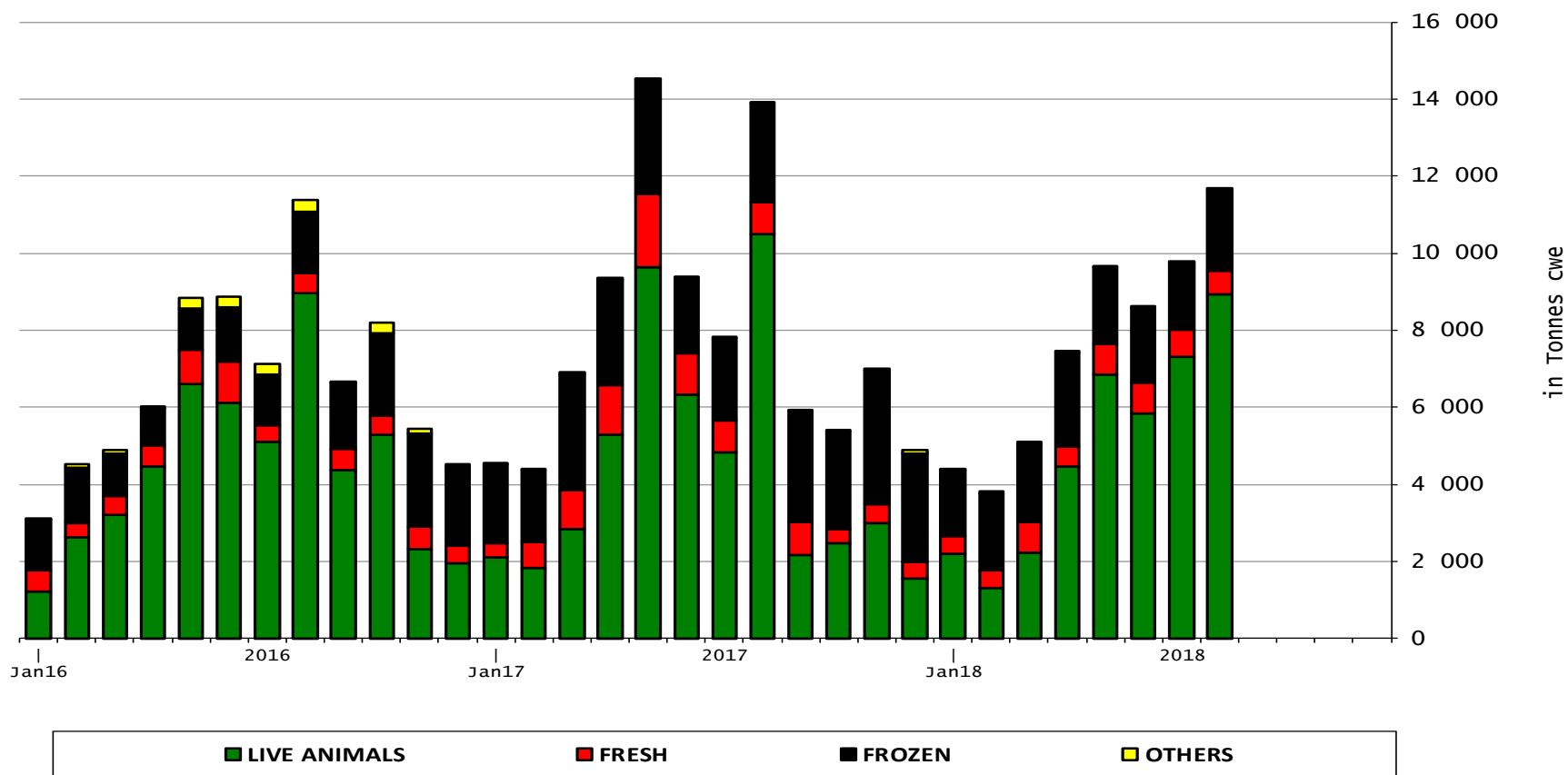
■ Libya
 ■ Jordan
 ■ Israel
 ■ Hong Kong
 ■ Lebanon
 ■ Other destinations

EU EXPORTS of Sheep & Goat (Millions EUR)



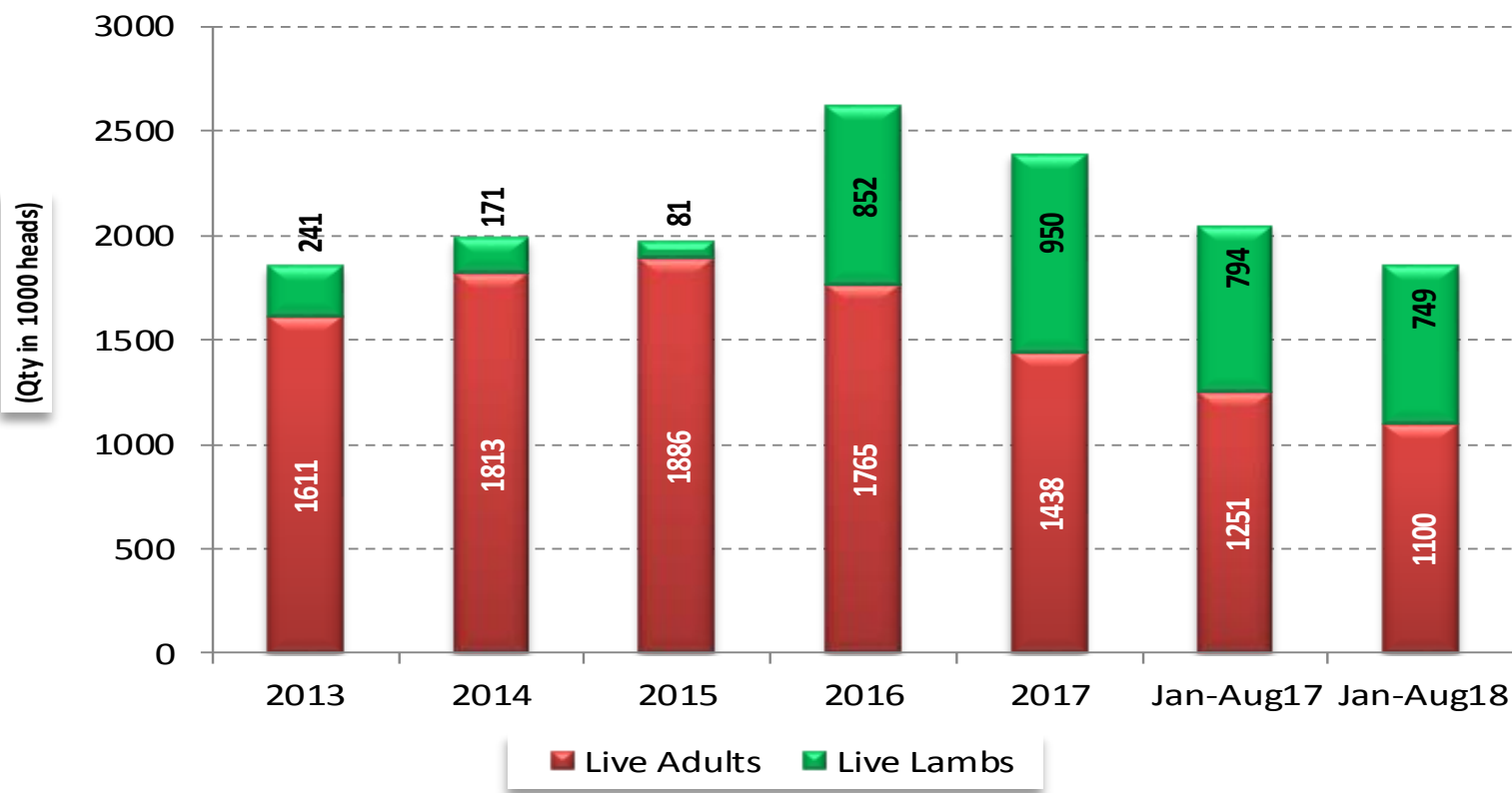
■ Libya
 ■ Jordan
 ■ Israel
 ■ Hong Kong
 ■ Lebanon
 ■ Other destinations

EU Exports of Sheep and Goat products

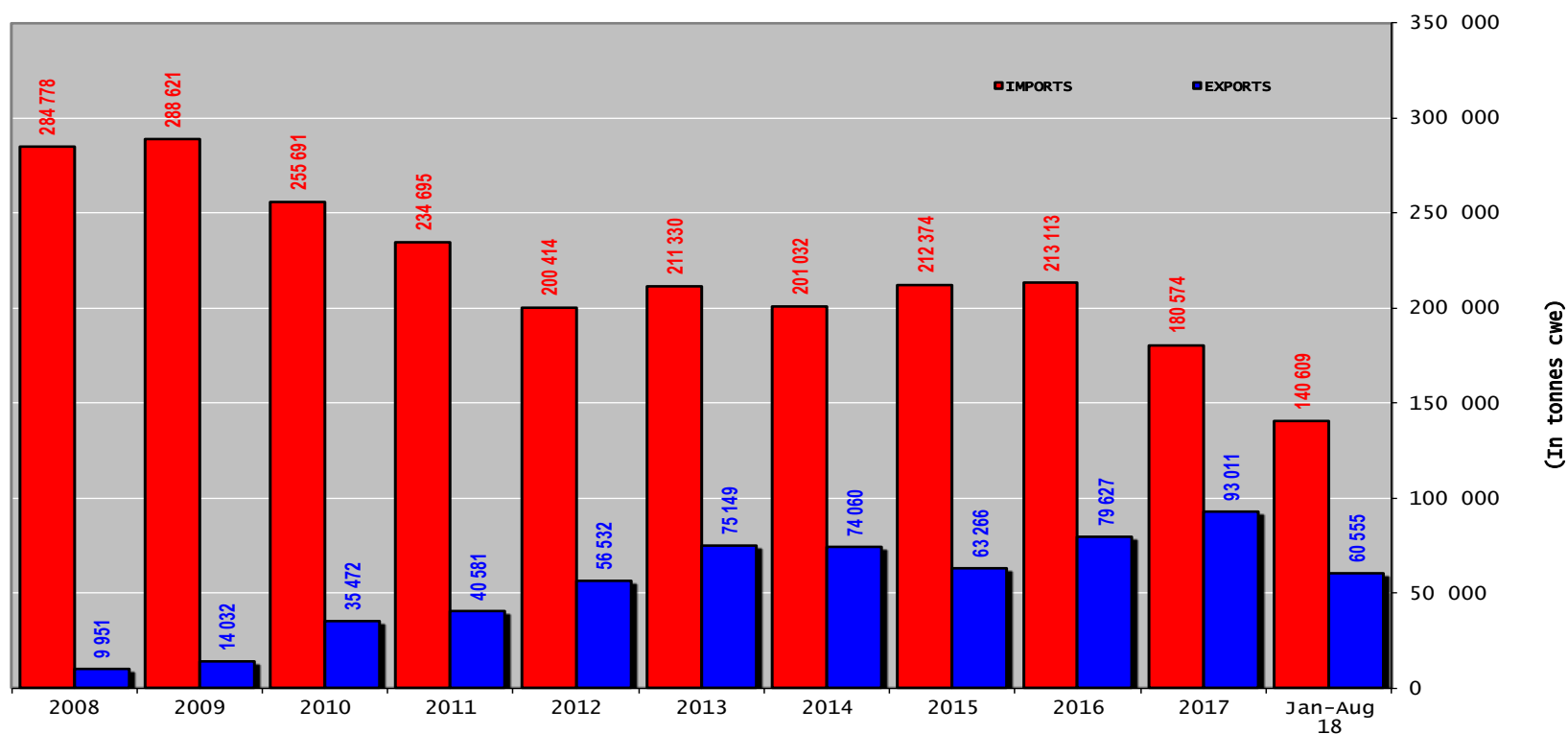




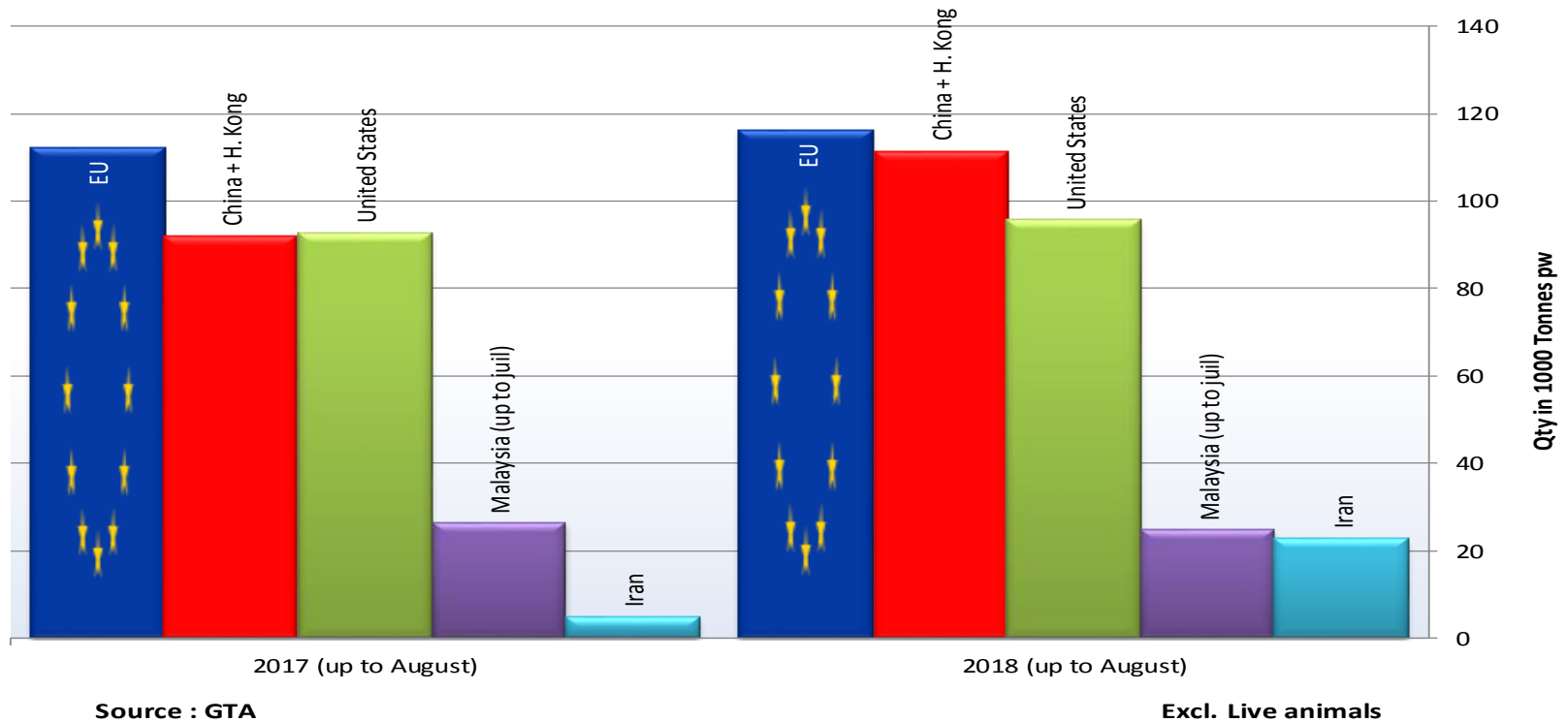
Evolution EU exports of live sheep (Excluding pure-bred breeding)



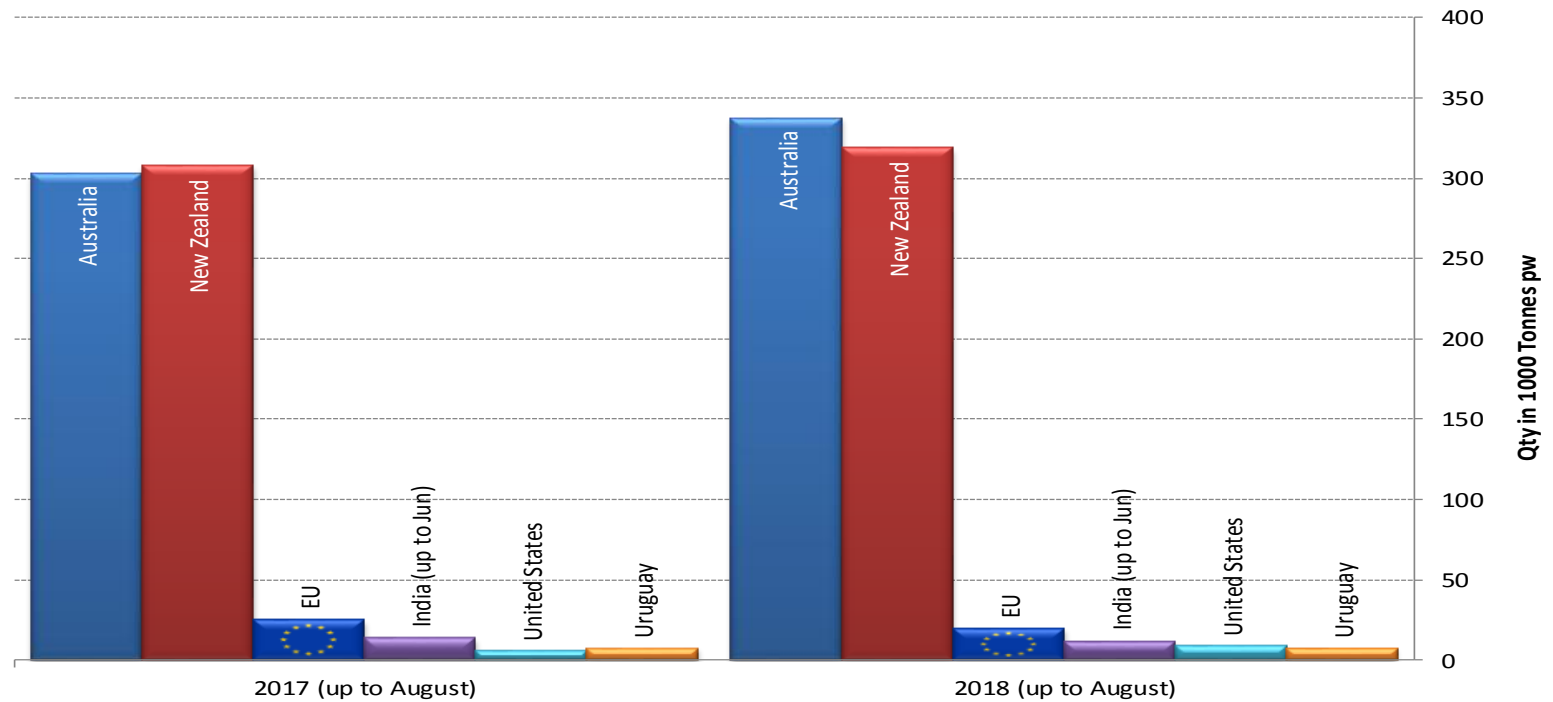
Evolution of EU Sheep and Goat Trade Balance



Main Importers of SHEEP&GOAT Products (up to August)



Main Exporters of SHEEP&GOAT Products (up to August)



Source : GTA

Excl. Live animals

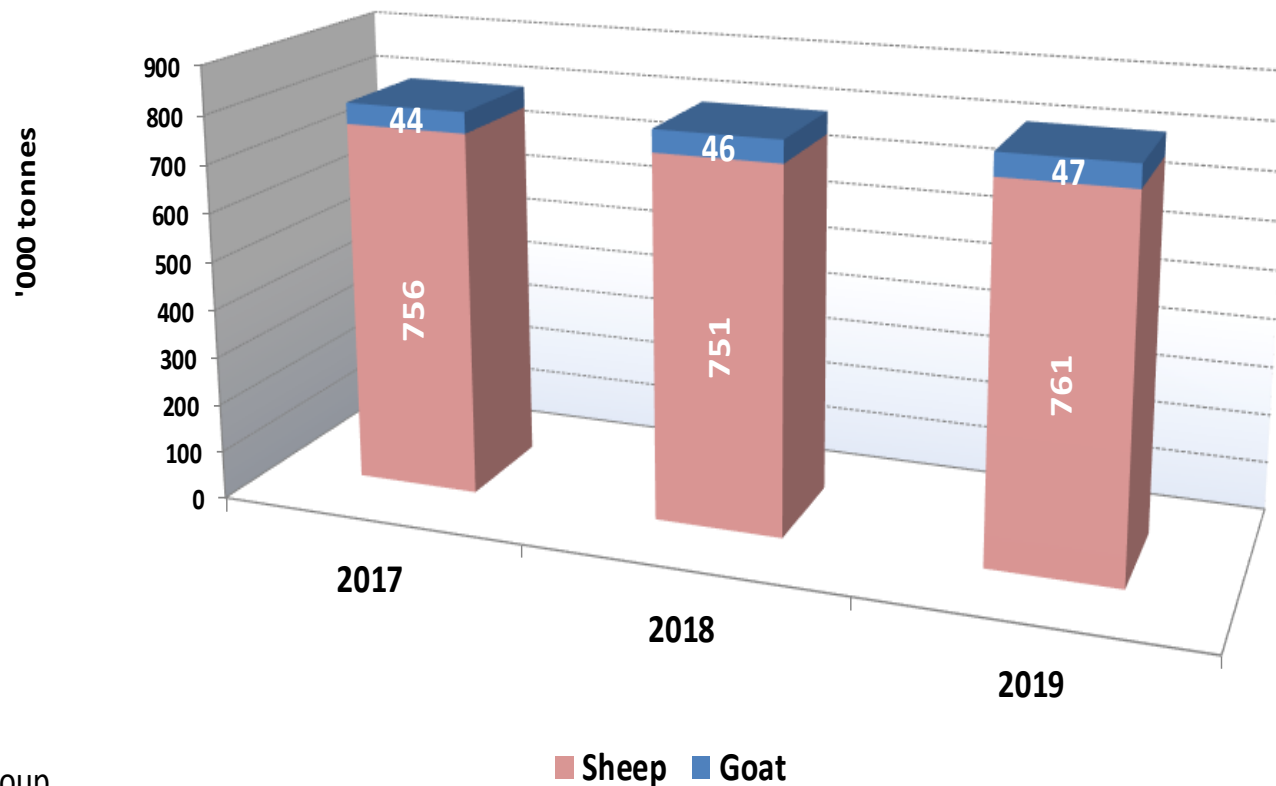


Outlook

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

Missing expert data from :

NL PL SK



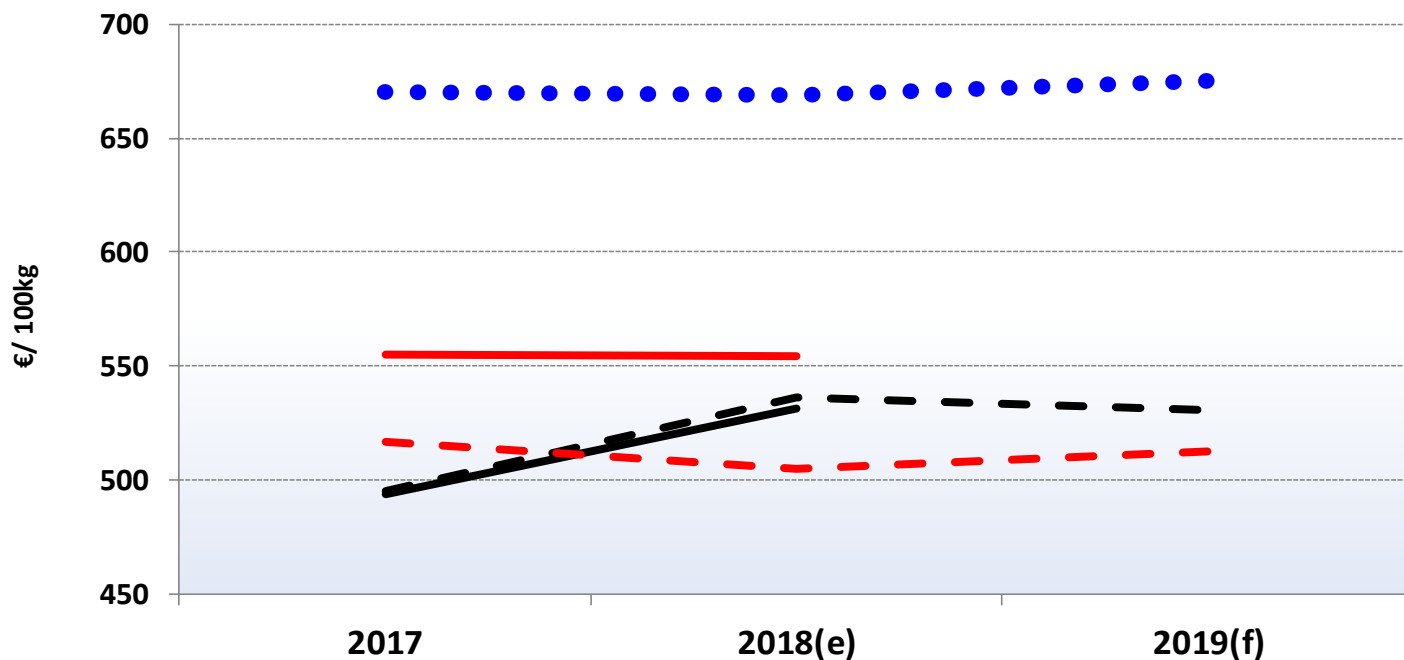
(*) Working Group

Prices for lamb and goat kid meat (based on WG (*) experts or weekly reported data)

(*) Working Group

Missing expert data from :

NL PL SK



— Expected average heavy lamb price
 - - Expected average light lamb price
 • • • Expected average goat kid price

— EU average price reported for heavy lamb
 - - EU average price reported for light lamb

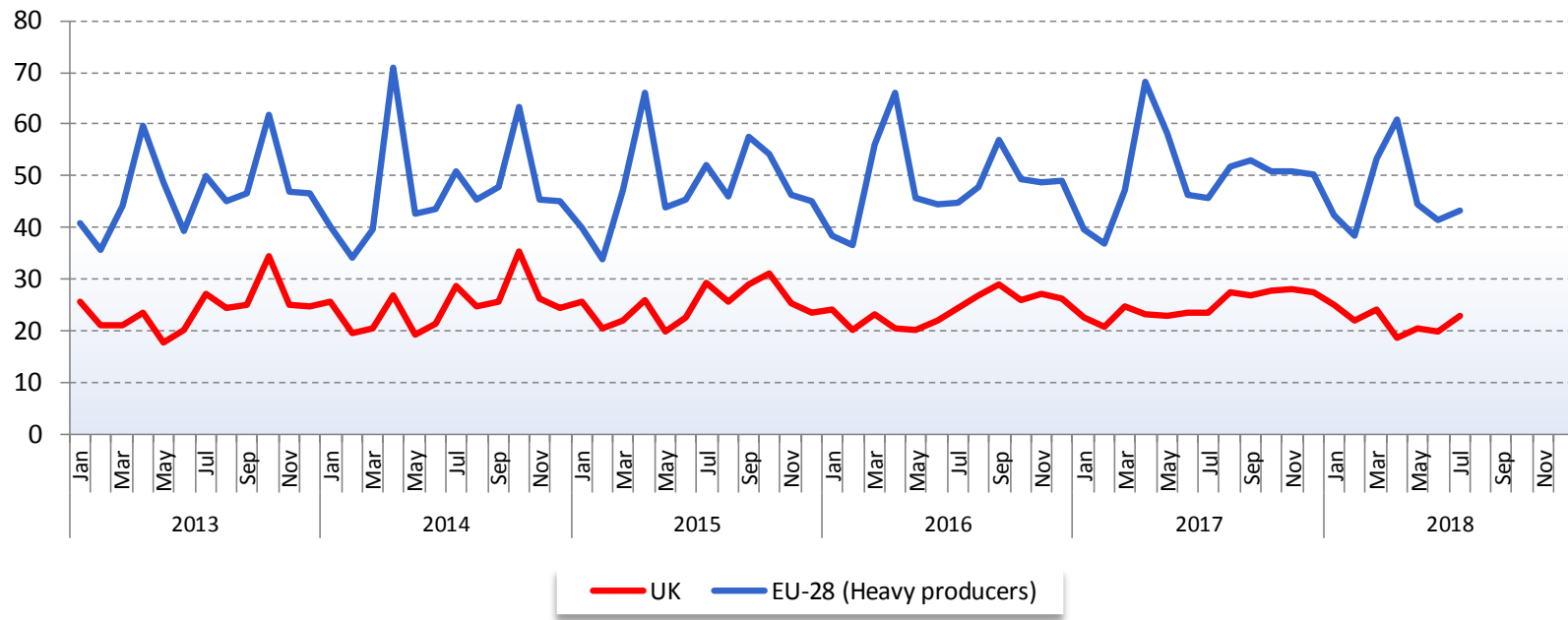
The place of UK in the EU sheep market



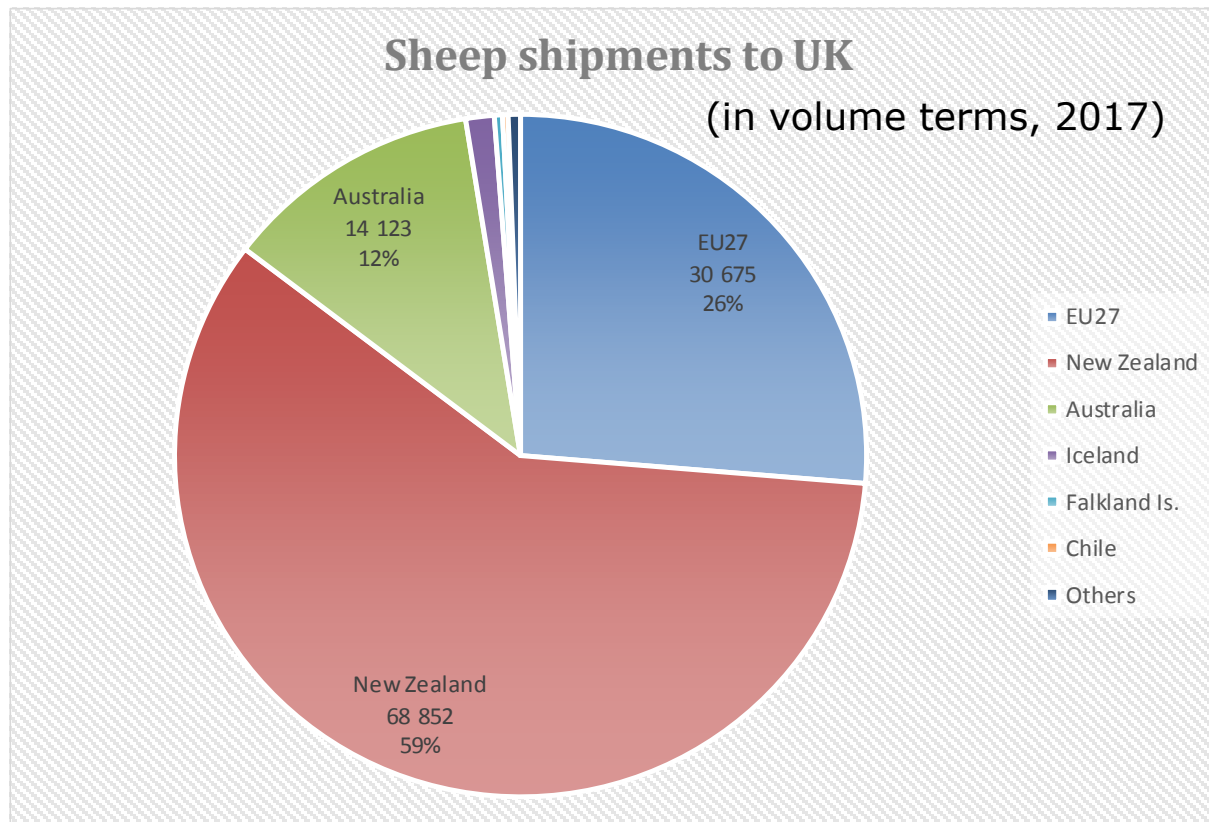
EU supply of heavy lamb is marked prominently by UK's turn over

Monthly sheep slaughtering in the EU and UK (in '000 tonnes)

Source: Eurostat

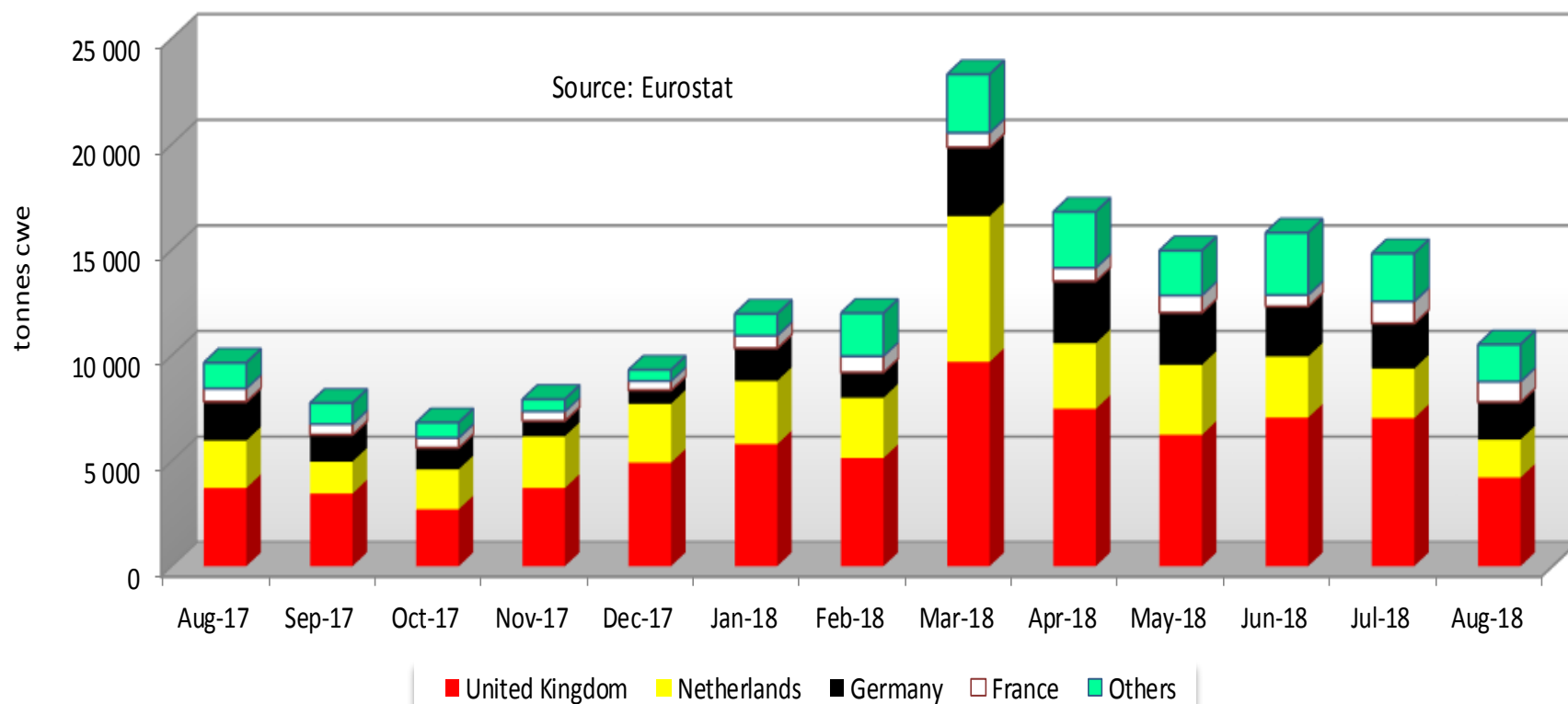


UK is the largest EU importer of sheep meat



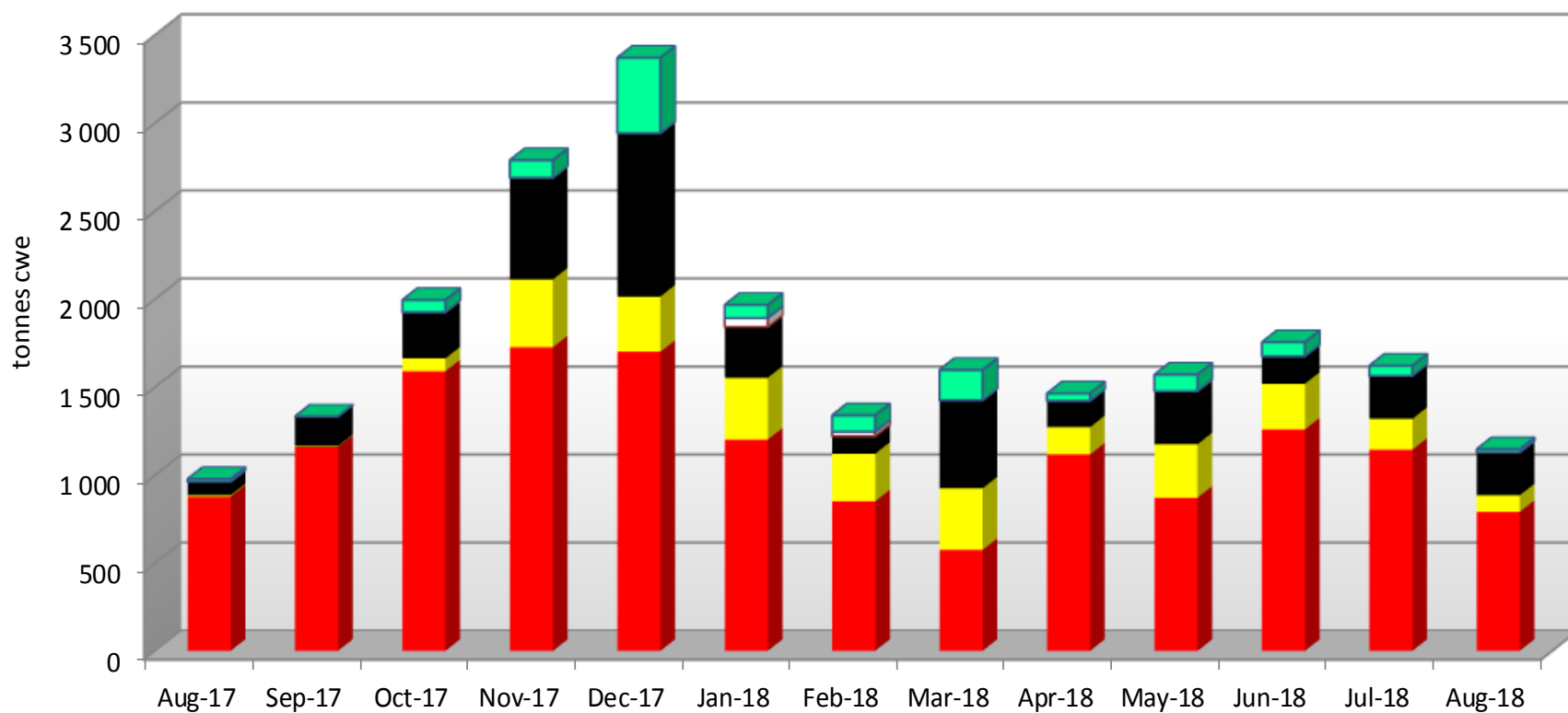
UK: main EU market for entering NZ sheep meat

Evolution of NZ exports of sheep meat to the EU



UK: main EU access market for AUS sheep meat

Evolution of AUS exports of sheep meat to the EU



Source: Eurostat

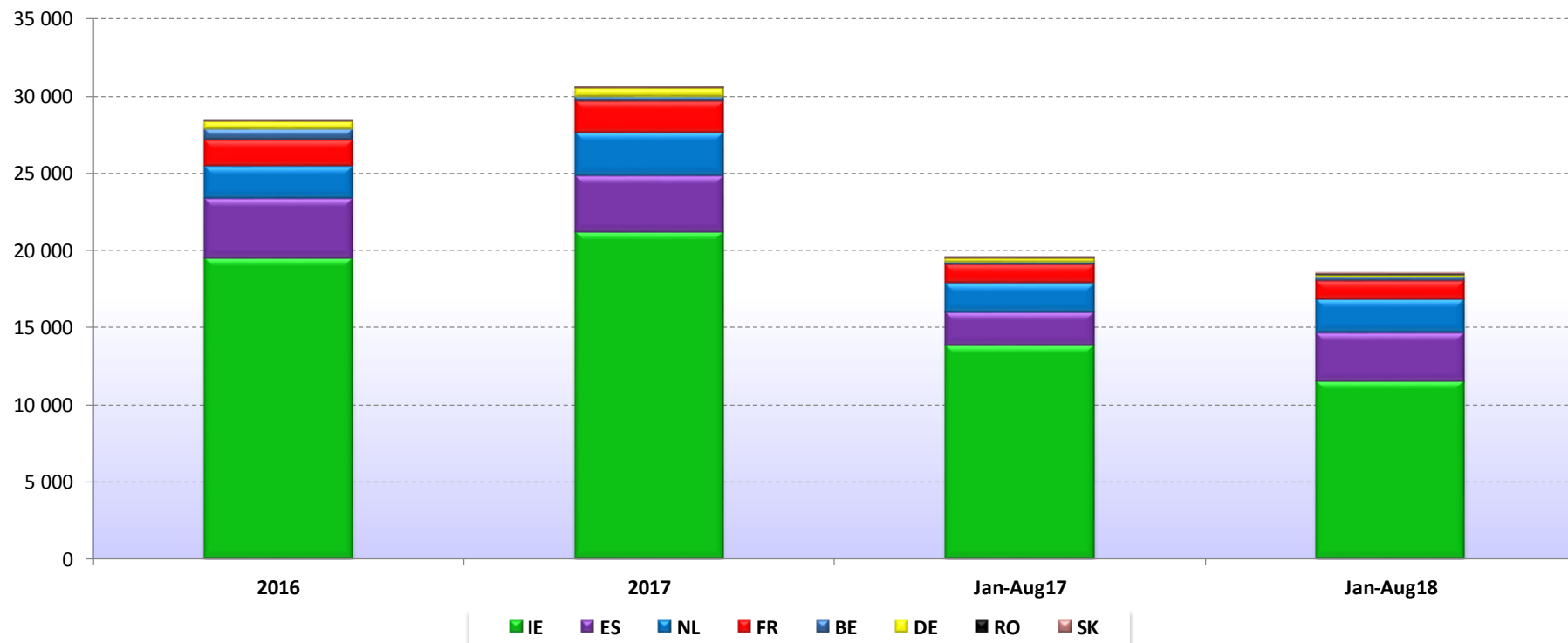
United Kingdom Germany Netherlands Romania Others

Intra trade EU27 to UK

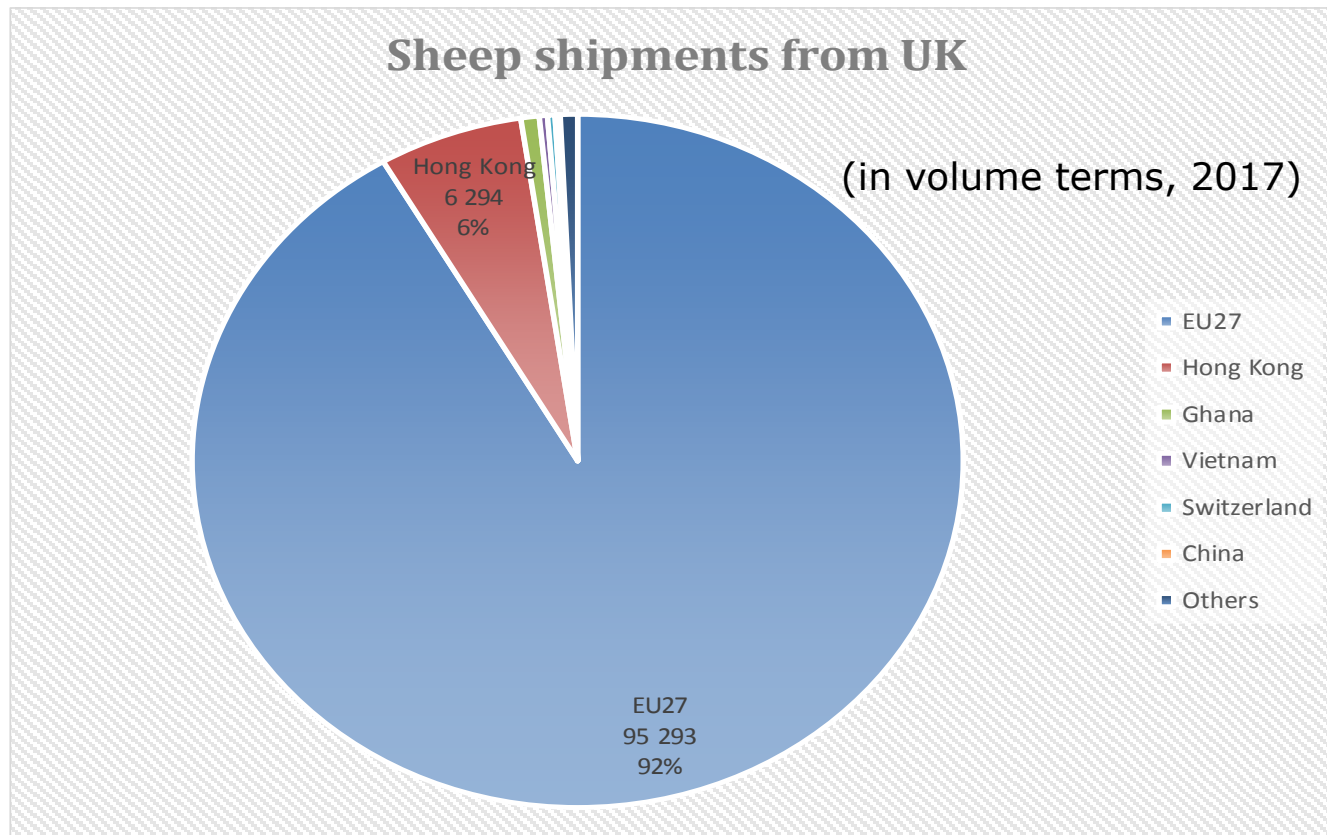


UK offers also market opportunities for EU sheep meat

EU27 sheep meat to UK
(tonnes CW)



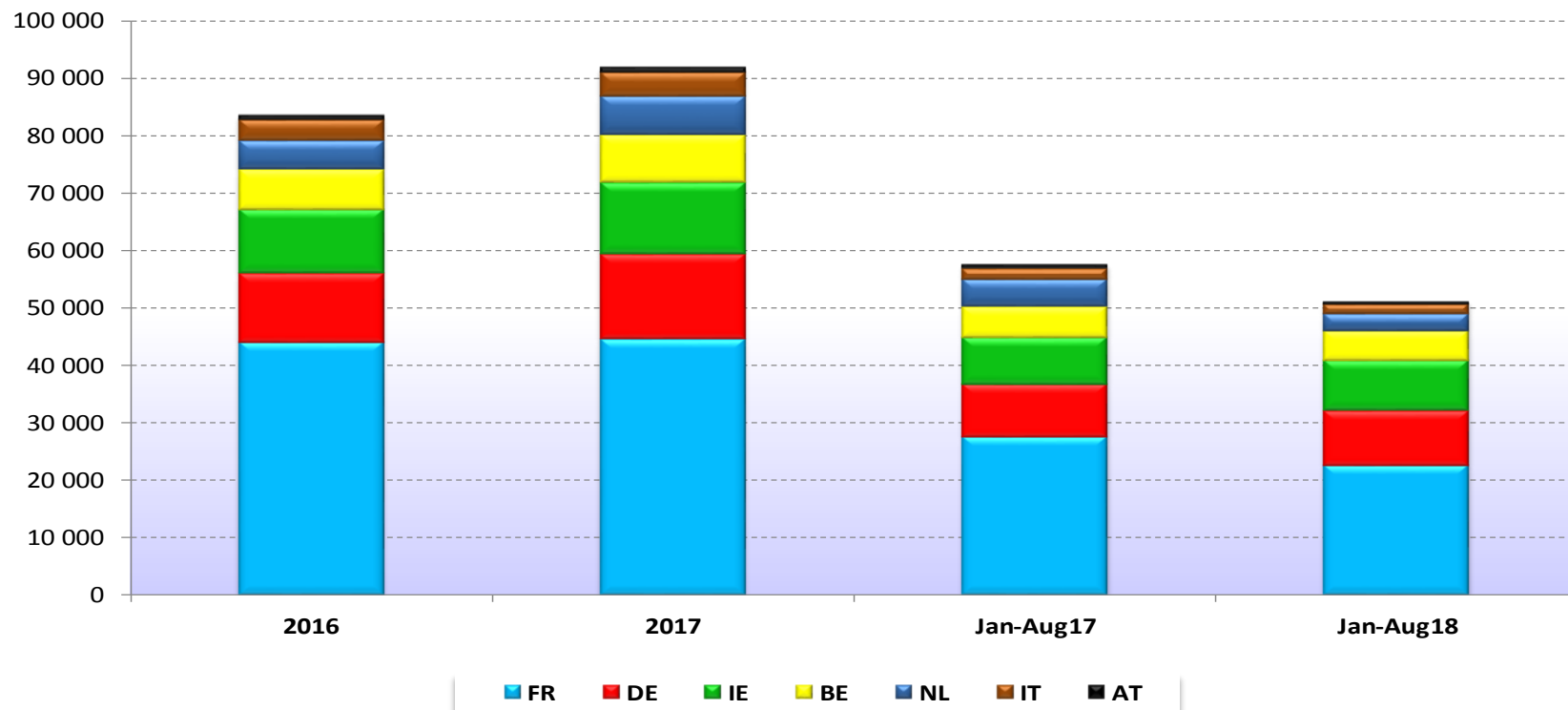
EU27 is the largest market destination for UK's sheep meat





UK's main EU27 market destinations

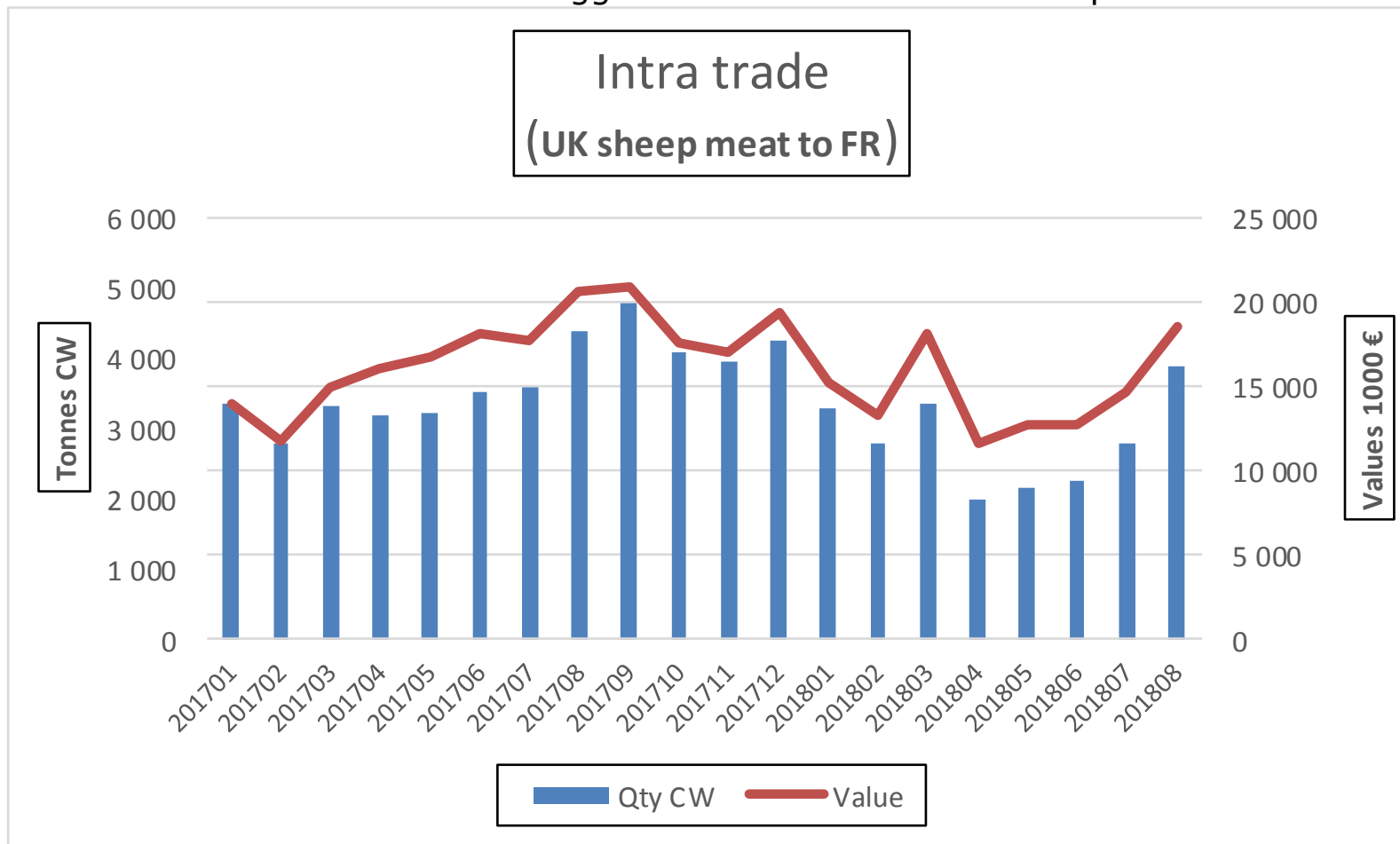
UK sheep meat to EU27
(tonnes CW)



Intra trade from UK



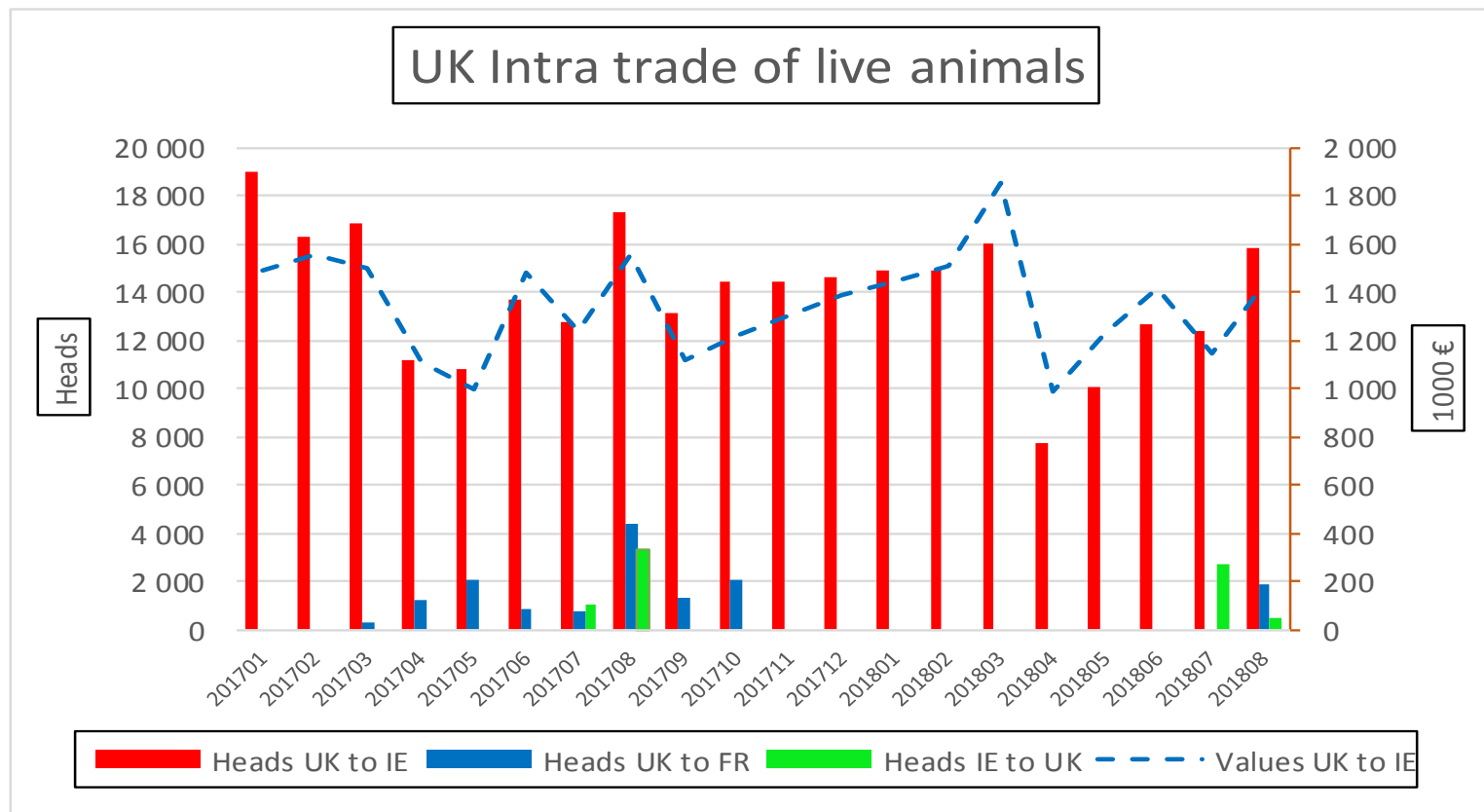
France is the biggest EU customer for UK sheep meat



Intra trade from UK

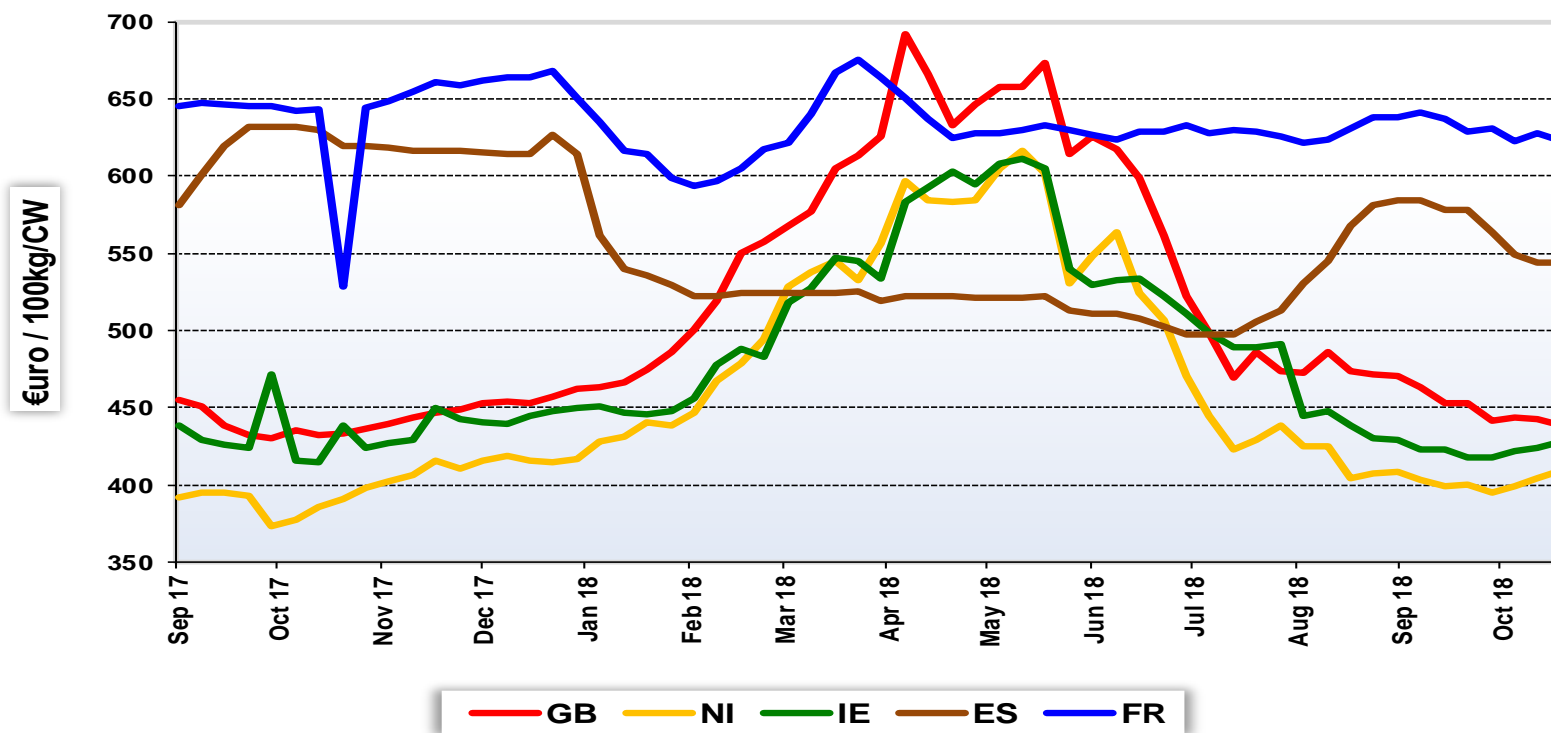


UK: important supplier of live sheep for slaughtering in EU

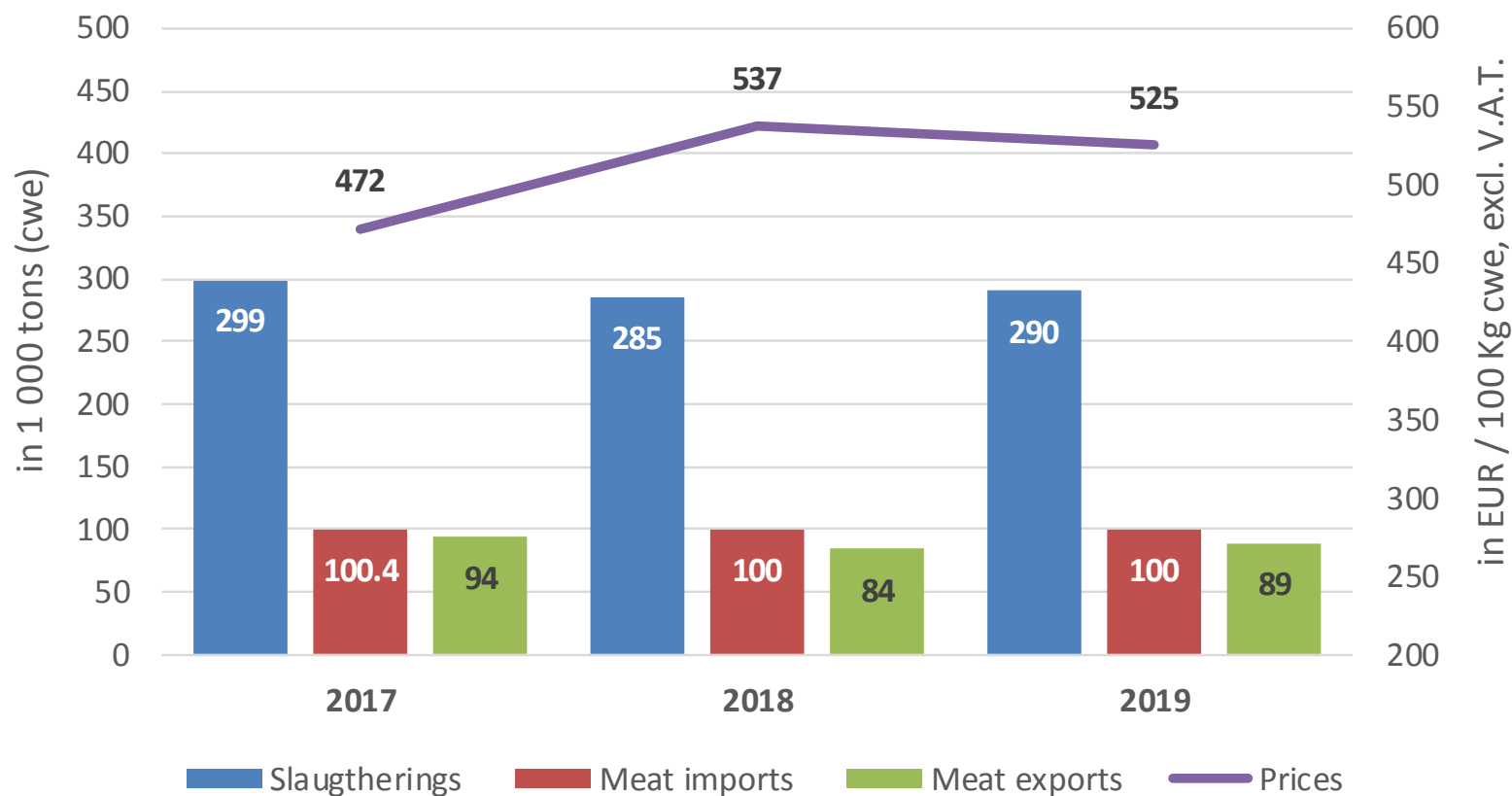


UK quotations affected EU lamb markets

Evolution of prices from main EU heavy lamb markets



UK forecast for sheep meat balance and prices



UK expert: access to EU markets is a base assumption for the projection



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