



SHORT-TERM OUTLOOK

FOR EU AGRICULTURAL MARKETS
IN 2019 AND 2020

AUTUMN 2019

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Agriculture
and Rural
Development

Executive Summary

These market forecasts **relate to the EU-28** as the UK is still a member at the date of the publication.

Despite the exceptionally hot and dry weather conditions over the summer, **EU cereal production recovered from last year's drop** and should reach 312 million t in 2019/2020. Only the EU maize crop, with a 4% decline, was negatively affected by drought, while wheat and barley outputs were significantly up across the EU. This should strengthen domestic consumption and exports.

By contrast, **EU oilseed production is significantly lower** due to a downturn in rapeseed production. EU imports should increase to compensate for the loss.

With a reduction in the EU sugar beet area close to 5% and a yield forecast above last year's low, 2019/2020 **EU sugar production is forecast around 17.5 million t, close to the previous production level**. Due to low domestic supply, the EU is expected to remain a net sugar importer in 2019/2020.

In 2019/2020, despite the lower harvest in Spain, the expected **olive oil production recovery** in Italy, Greece

and Portugal and large availabilities of stocks in the EU will contribute to an above average level of EU exports.

2019 EU peaches' production is expected to be slightly above last year's, driven by favourable weather conditions. This should mainly translate in higher consumption and processing.

An **increase in EU production of tomatoes**, mainly for processing, and record exports are forecast in 2019.

The EU production of apples in 2019/2020 is expected to be 8% below average, driven by a large reduction in Poland due to frost. EU exports of processed apples are nevertheless expected to increase in 2019/2020.

In 2019, **the EU milk collection could grow by only 0.5%** compared to last year, due to the decline in dairy herd and the expected slowdown in yield growth because of the drought. EU exports of SMP are record high and cheese shipments are sustained. In addition, the decline of the EU butter price renders butter more attractive in the world market.

EU gross beef production is expected to decline by almost 1% in 2019, but there are huge differences between MS. While the trade balance in beef meat is

improving significantly, live exports could decline by 16% due to a challenging Turkish market.

The surge of **pigmeat** demand from China due to the spread of African Swine Fever will push **EU exports (+20%)** and prices up in 2019. **Production will nevertheless remain stable in 2019**, constrained by a reduced breeding herd and environmental restrictions. Production growth should pick up in 2020 (+1.5%) as Chinese demand continues.

Poultry production will keep growing in the EU in 2019 (+2.5%) thanks to good domestic and international demand. Growth should continue in 2020 as more consumers switch from expensive pigmeat to poultry.

EU sheep meat production is expected to recover in 2019 (+1%), thanks to favourable forage conditions, a high number of ewes put to the ram and anticipated slaughterings in the UK in view of the Brexit. Trade balance is improving thanks to surging demand in the Middle East and China.

Overall, **per capita meat consumption is expected to decrease by 0.5% in 2019**, mainly driven by lower supply, and it could remain at this level in 2020.

MACRO- ECONOMIC OUTLOOK

Macroeconomic background

Geopolitical tensions hold back growth¹

- € Geopolitical tensions and in particular the trade tensions between the US and China, the **uncertainty** around Brexit and the Boeing/Airbus dispute **hold back economic growth**. The world GDP growth forecast has been revised downwards since June, at 2.7% in 2019 and 2.6% in 2020.
- € Nevertheless, the **sharp fall in EU GDP registered in the first quarters of 2019 has halted**. The EU economy does not have a large buffer against recession but the risk has declined. EU GDP is expected to grow by 1.3% in 2019 and by 1.0% in 2020. The outlook for the US economy (+2.1% in 2020) is stronger than for the EU, supported by recent monetary easing and expected fiscal stimulus in 2020. For China, the magnitude of the slowdown is uncertain, with a considerable negative impact of the ongoing trade tensions. Stimulus measures are expected in 2019-2020.
- € The weak Eurozone growth has increased expectations of further monetary easing and a longer period of very low interest rates in the Eurozone. The diverging development of the EU and the US economies has delayed a convergence of

interest rates, and held back an anticipated appreciation of the euro. The forecast for EUR/USD


is 1.12 for 2019 and 2020. This weaker level, compared to last year, favours EU exports.

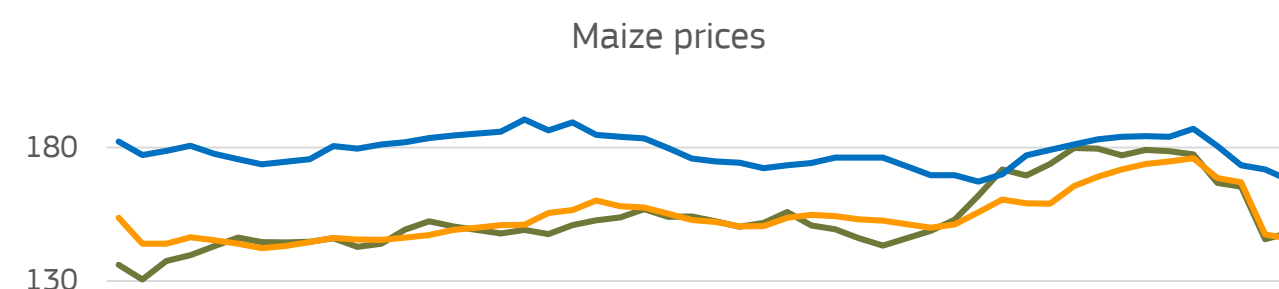
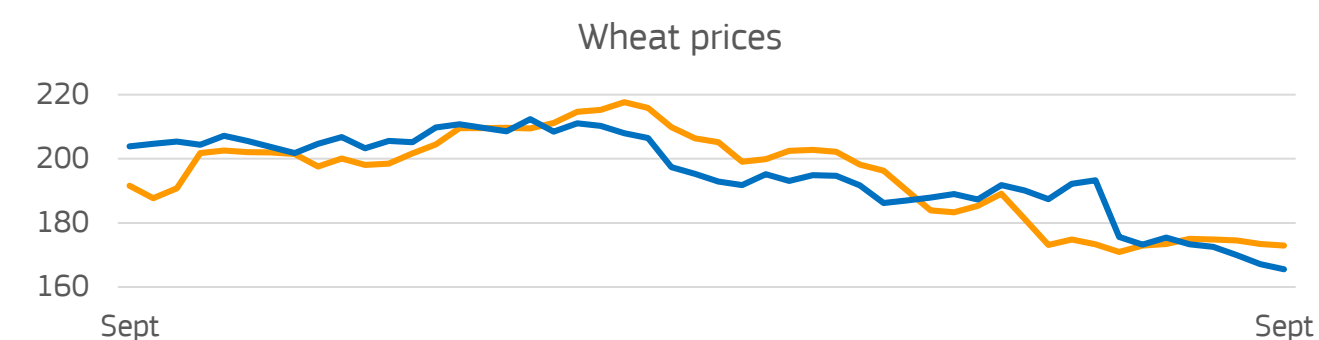
- € Currencies of emerging economies such as **Argentina, Brazil and China have depreciated** since June, and a further depreciation is expected for 2020-2021. Argentina and Brazil are major net exporters of agricultural commodities and this depreciation increases their competitiveness on the global market. China is a net importer of several agricultural products and a depreciation of the yuan renders imports more expensive for consumers.
- € The economic slowdown has eased the demand for crude oil and the market is expected to be **balanced, despite the recent attack** on key crude oil infrastructure in Saudi Arabia. This attack has cut global oil supply by 5%, resulting in a sharp price hike. Release of strategic reserves in the US will partly offset the shortfall, and refining capacity is expected to be restored within a relatively short time frame, moving prices lower.
- € At Brent, crude oil prices are around USD 60/barrel. The **outlook for the Brent crude oil price** for 2020-2021 is **relatively stable** at USD 60-65/barrel.


¹ IHS Markit is the source of all forecasts mentioned in this chapter


ARABLE CROPS

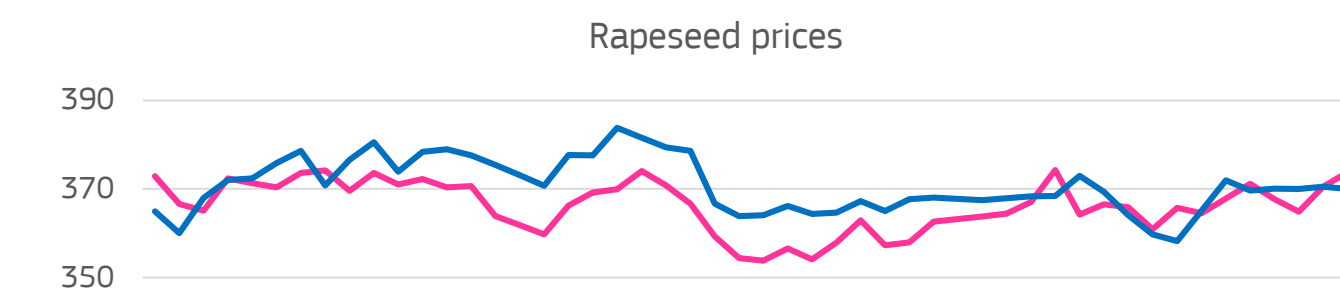
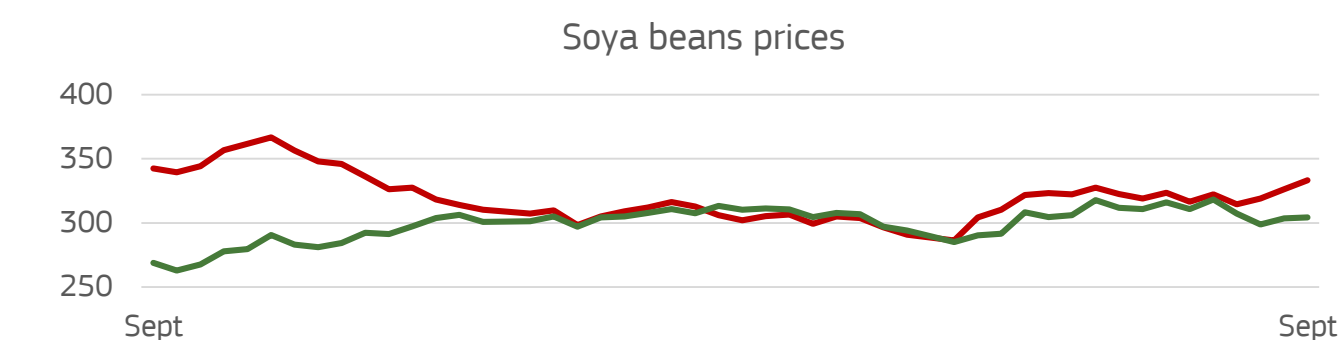
Market developments in the EU


CEREALS 	2018/2019	2019/2020
Production	👉 -4.9%	👈 +7.6%
Exports	👉 +1.6%	👈 +13%
Imports	👈 +26%	👉 -25%
Consumption	👉 +0.8%	👉 +2.1%



PROTEIN CROPS 	2018/2019	2019/2020
Production	👉 -22%	👈 +6.8%
Exports	👉 -47%	👈 +12%
Imports	👈 +17%	👉 -2.1%
Consumption	👉 -8.1%	👈 +5.2%

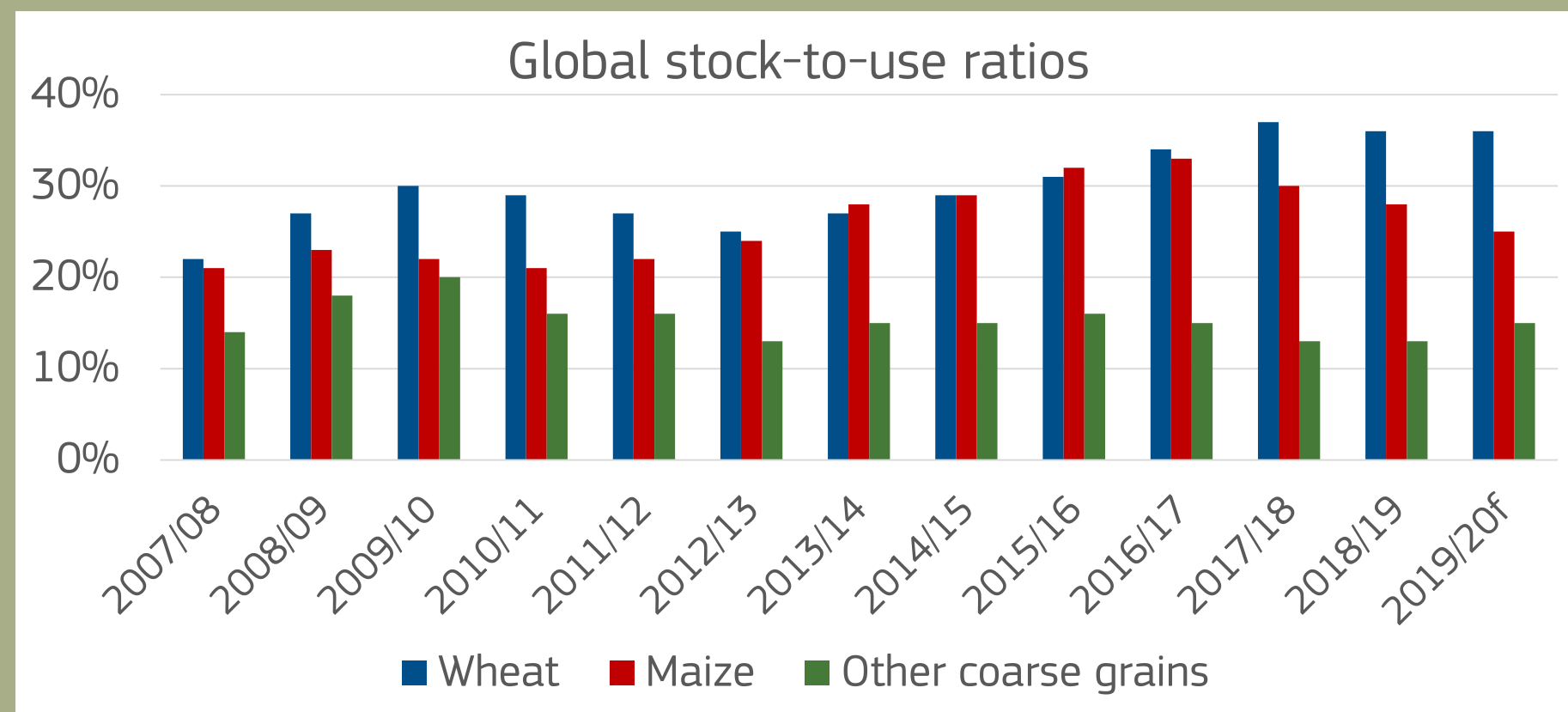
OILSEEDS 	2018/2019	2019/2020
Production	👉 -6.4%	👉 -9.4%
Exports	👉 -25%	👉 -0.3%
Imports	👈 +6.1%	👈 +6.5%
Consumption	👉 +3.5%	👉 -2.2%



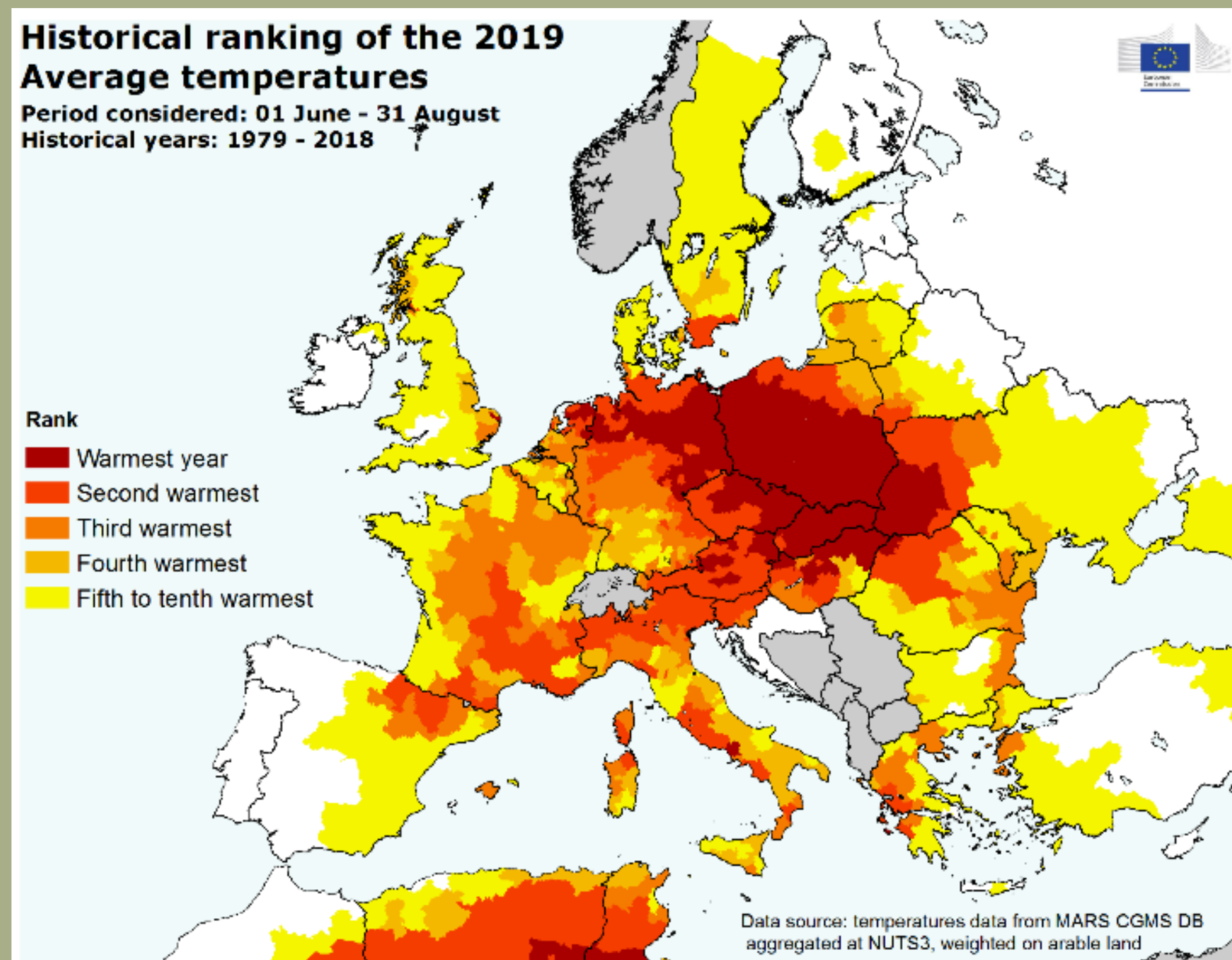
SUGAR 	2018/2019	2019/2020
Production	👉 -17%	👉 -1.0%
Exports	👉 -54%	👉 -3.2%
Imports	👈 +41%	👈 +5.6%
Consumption	👉 -2.1%	👉 -4.0%

Note: % compared to previous period

Prices are all export prices in EUR/t (blue: EU; yellow: Black Sea; green: US; red: Brazil; pink: Ukraine)



Source: DG Agriculture and Rural Development, based on International Grains Council



Source: MARS bulletin crop monitoring in Europe 27(9), Joint Research Centre

Global grain production on the rise in 2019/2020



World grain production is expected to reach 2.2 billion t in 2019/2020, **0.7% above** last year. This growth comes mainly from the biggest wheat and barley producing regions.



Global **wheat output** is growing in all regions of the world, with a **4% increase** year-on-year. The US is expected to reach 54 million t (+5%) and Russia 74 million t (+3%). **Barley** output is expected **to increase** as well to 155 million t (+10%).



Maize crop has been suffering from adverse weather conditions, either at the time of sowing (in the US and Ukraine) or during the growing period (EU). The global output should **contract by 3%** compared to the close to record high level last year. Nevertheless, stocks are still quite high.



According to the International Grain Council, industrial uses of grains (largely for ethanol production) are expected to increase, especially in China (+4% compared to last year).

Warm and dry crop conditions in most of the EU during summer 2019



Weather conditions have been diverse across the EU with **high temperatures** from central-eastern to western EU, and significant rainfall in south-eastern EU as well as in Ireland and the UK.



Several heatwaves impacted the development of summer crops from June to August, with temperatures close to record levels (over 40° in France and the Benelux).



Heatwaves were combined with a **continuous drought** in a large part of the EU (e.g. Germany, Poland, Czechia and Slovakia). In other regions in Spain and Poland, light rainfalls did not compensate for the lack of water.



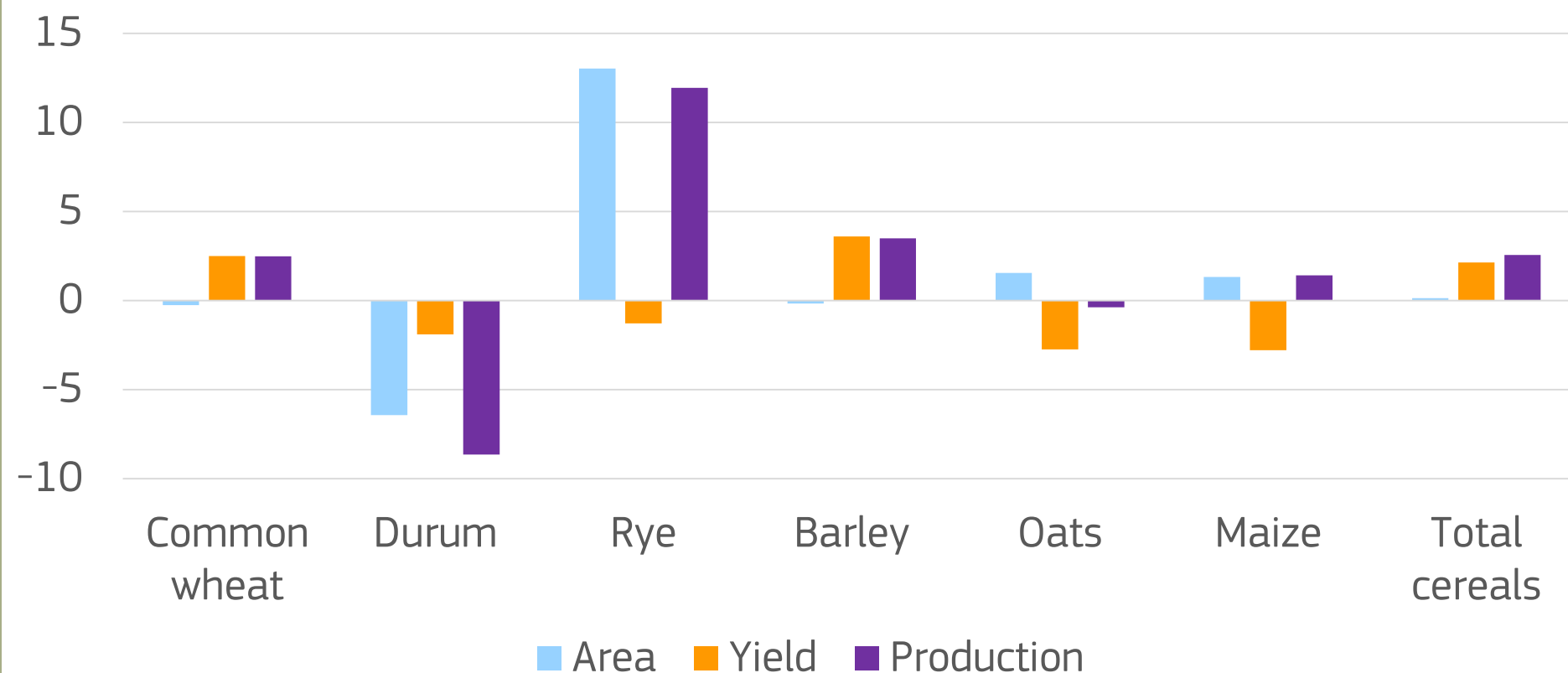
However, Ireland and the British isles, as well as some parts of France and Greece, benefitted from **significant rainfall** over the summer.



Despite the rain deficit in eastern continental Europe, crop conditions were relatively good for both wheat and maize output, respectively in Russia and Ukraine.

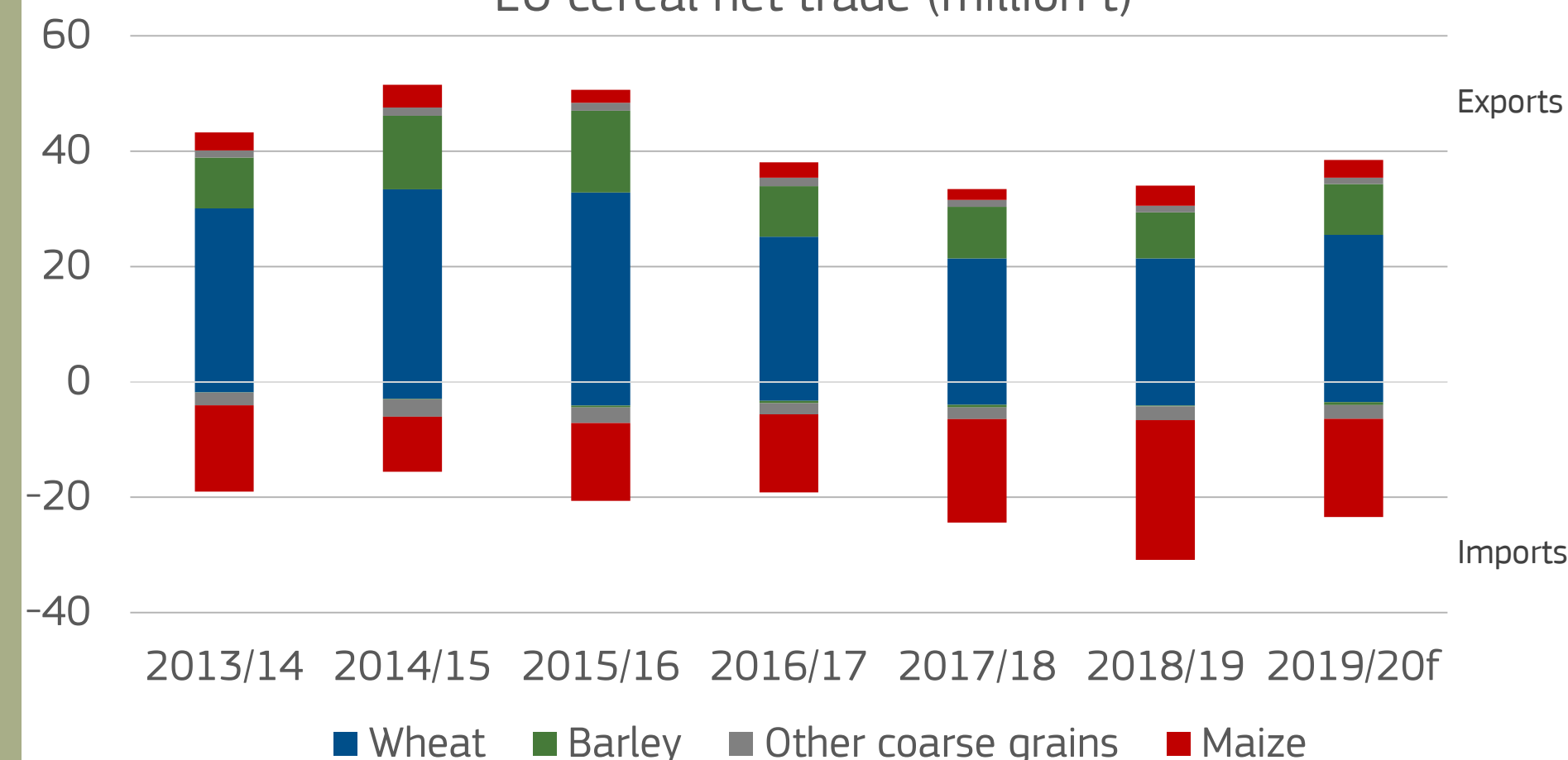
Cereals

EU cereal area, yield and production change in 2019/2020 compared to the 5-year average (%)



Source: DG Agriculture and Rural Development

EU cereal net trade (million t)



Source: DG Agriculture and Rural Development, based on Eurostat

EU cereal output is bouncing back in 2019/2020

The higher sowing area for cereals in the EU is confirmed at 56.5 million ha in 2019/2020, pushed by common wheat, rye and maize. **EU total production** is estimated at **312 million t**.

EU wheat was not affected by the hot conditions and the EU output recovered from last year's low, reaching **145 million t** (+2.5% compared to the average¹). The biggest wheat growers, France and Germany, are up by respectively 16% and 13% compared to last year.

By contrast, due to the dry conditions, the **maize** crop is expected to fall to **66.5 million t**, which is close to the average. Still, countries in south-eastern EU benefitted from fair weather conditions and have higher-than-average yield estimates.

The **production of other coarse grains** is on the rise (+9% compared to last year) due to **barley** and **rye** production's **increase** (respectively +9% and +34%).

¹ 5-year olympic average

EU domestic use and trade prospects to strengthen in 2019/2020

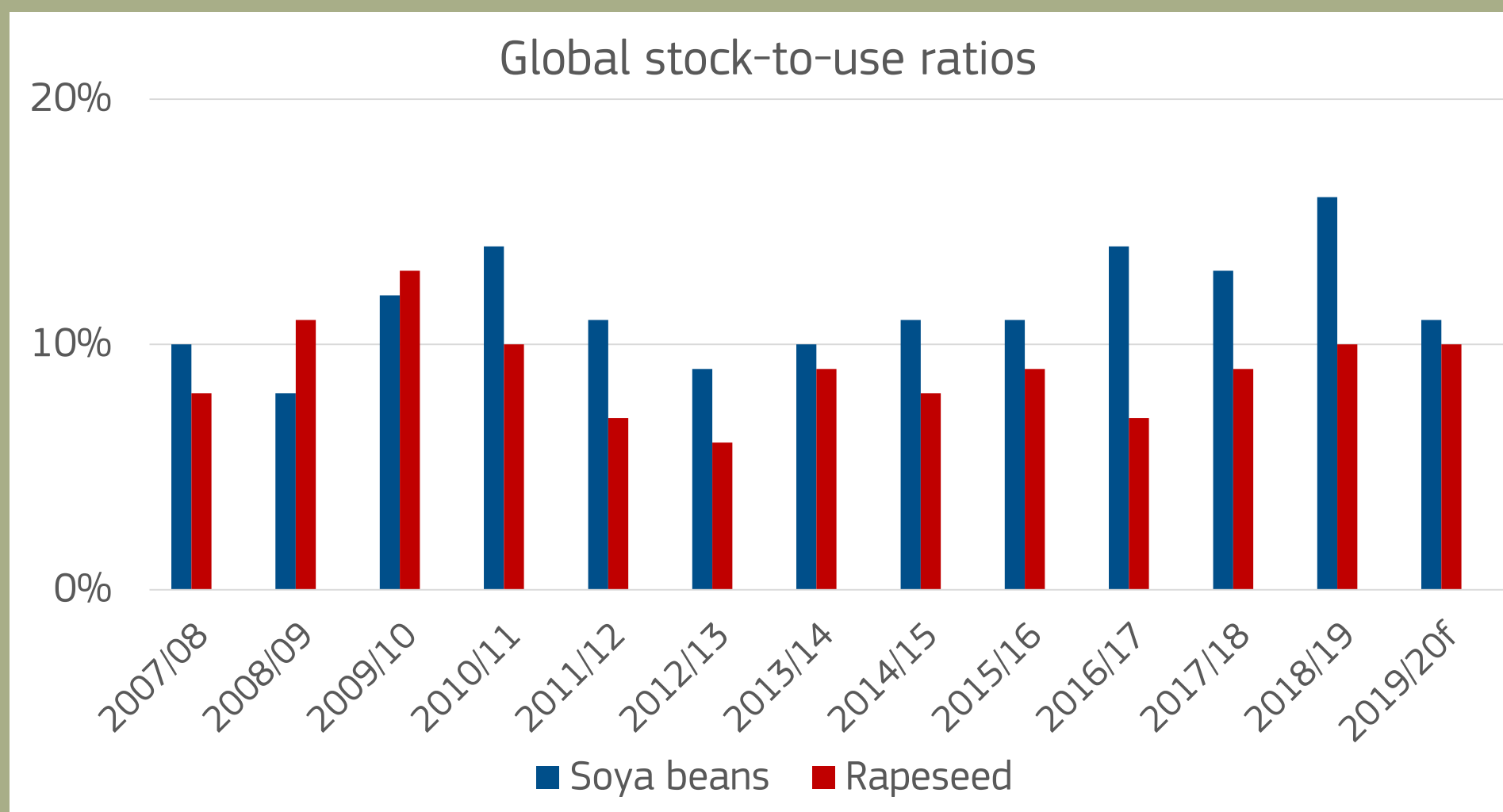
In 2018/2019, wheat exports stabilised at 21 million t and barley exports slightly fell to 8 million t. By contrast, maize imports were very dynamic.

In **2019/2020**, a **recovery in wheat and barley exports** is expected thanks to a higher EU crop, a strengthened demand worldwide and a competitive price.

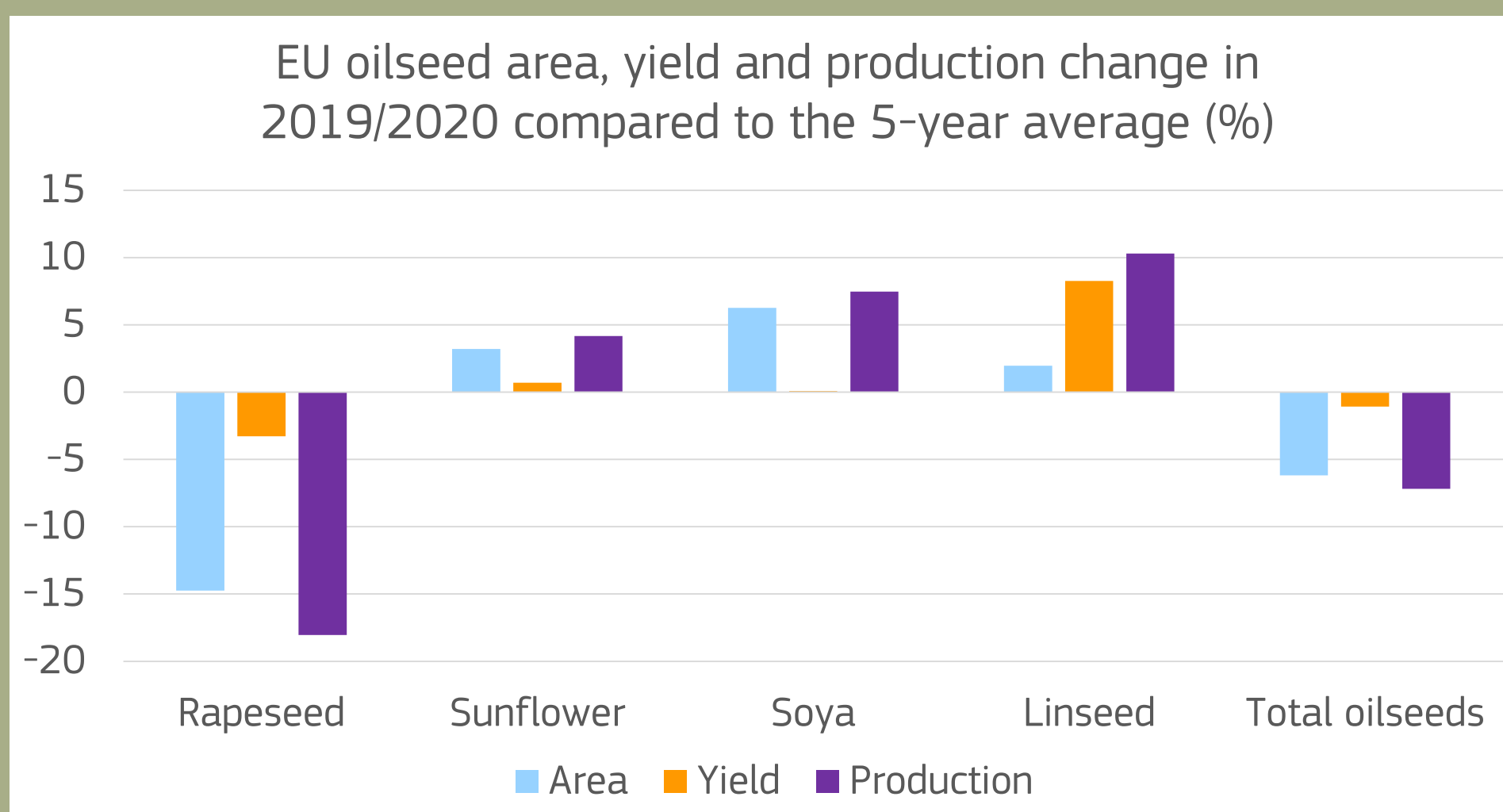
Maize imports in the EU are expected to slow down compared to last year record peak as EU grain availability for feed use recovers. Besides, other feed cereal prices are falling due to the ample supply. Still, since the beginning of the marketing year (July), EU maize imports are abundant due to a competitive price.

Domestic use across the EU is **expected to increase**, especially for feed purposes. Feed demand should reach 179 million t, slightly above last year's high. Compound feed is expected to be used more, especially in regions where dry conditions did not allow grass to grow. Industrial uses are also expected to grow slightly, for biofuel (maize and wheat) and alcohol (malting barley) production.

Oilseeds – Oilmeals – Vegetable oils



Source: DG Agriculture and Rural Development, based on International Grains Council



Source: DG Agriculture and Rural Development, based on Eurostat

Lower oilseed global production in 2019/2020



Global **soya bean** production declines in 2019/2020, due to the drop in US production, which is expected 20% down¹, affected by a reduction in planted area and yields. Despite a **contraction of global availabilities**, demand should strengthen, but less than expected, due to the lower feed demand in China because of the African Swine Fever development there.



A **downturn** of global **rapeseed production** is expected as the biggest producers, Canada and the EU, are expecting a lower crop. Global demand should weaken as a result.



Despite the reduction of soya bean production, large carry-overs will allow **soya meal** production to **increase** in all main producing countries.

¹ International Grains Council

EU oilseed production to reach a 7-year low in 2019/2020



Adverse weather conditions across the EU impacted negatively **oilseed** output, estimated at **29.7 million t** (-9% compared to last year), and thus 7% below average.



Difficult sowing conditions led to a reduced rapeseed planted area. On top of that, the **rapeseed** crop has been negatively affected by hot conditions, especially during the grain filling period late June (in Germany and Poland). This results in a **16% decrease** of the production compared to last year, close to **17 million t**.



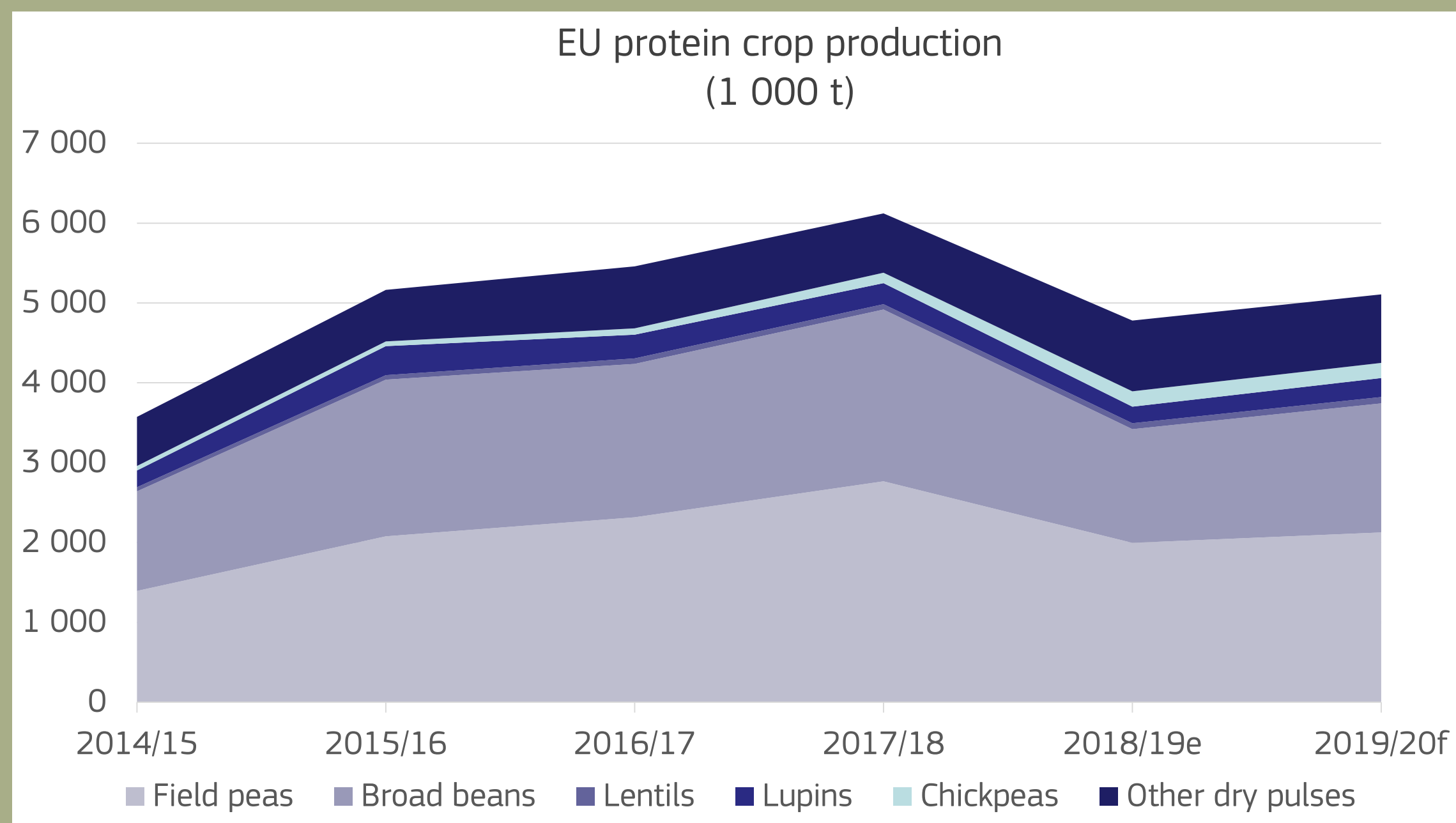
EU sunflower and **soya bean** production is **stable** compared to last year, at 10 and 3 million t, respectively. Production is above average thanks to increased sowing areas, especially soya beans in Italy and Romania, and sunflower in France and Romania.



EU imports should **increase** slightly to compensate for the drop in rapeseed production and sustain the production of **oil meals** in the EU, in a context of **stable meal domestic use**. The total production of meals should reach 30.5 million t (-2% compared to last year). Imports of soya meals should slightly strengthen and reach the 2017/2018 level.

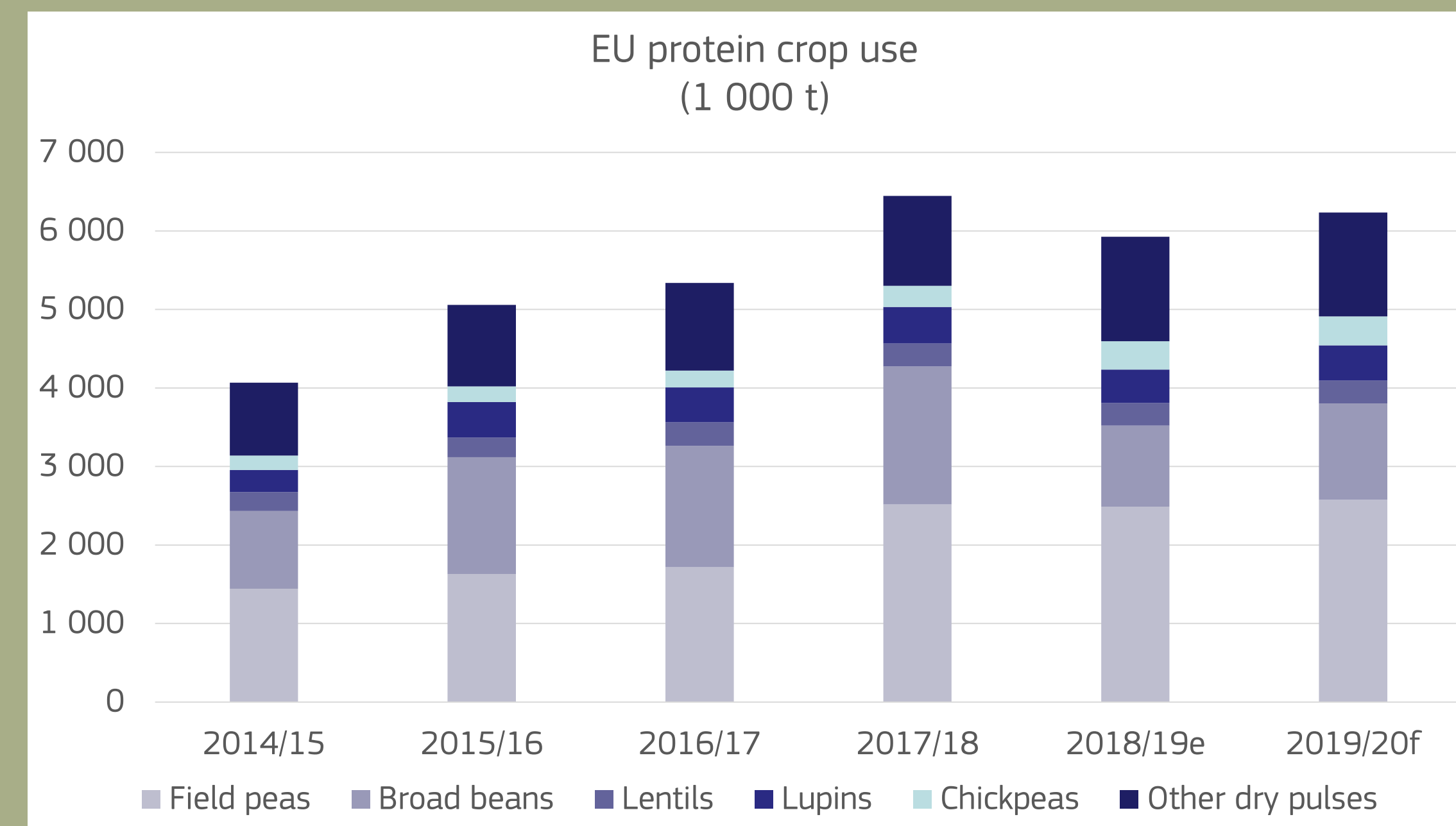
Protein crops

EU 2019/2020 production increases with better yields



Source: DG Agriculture and Rural Development

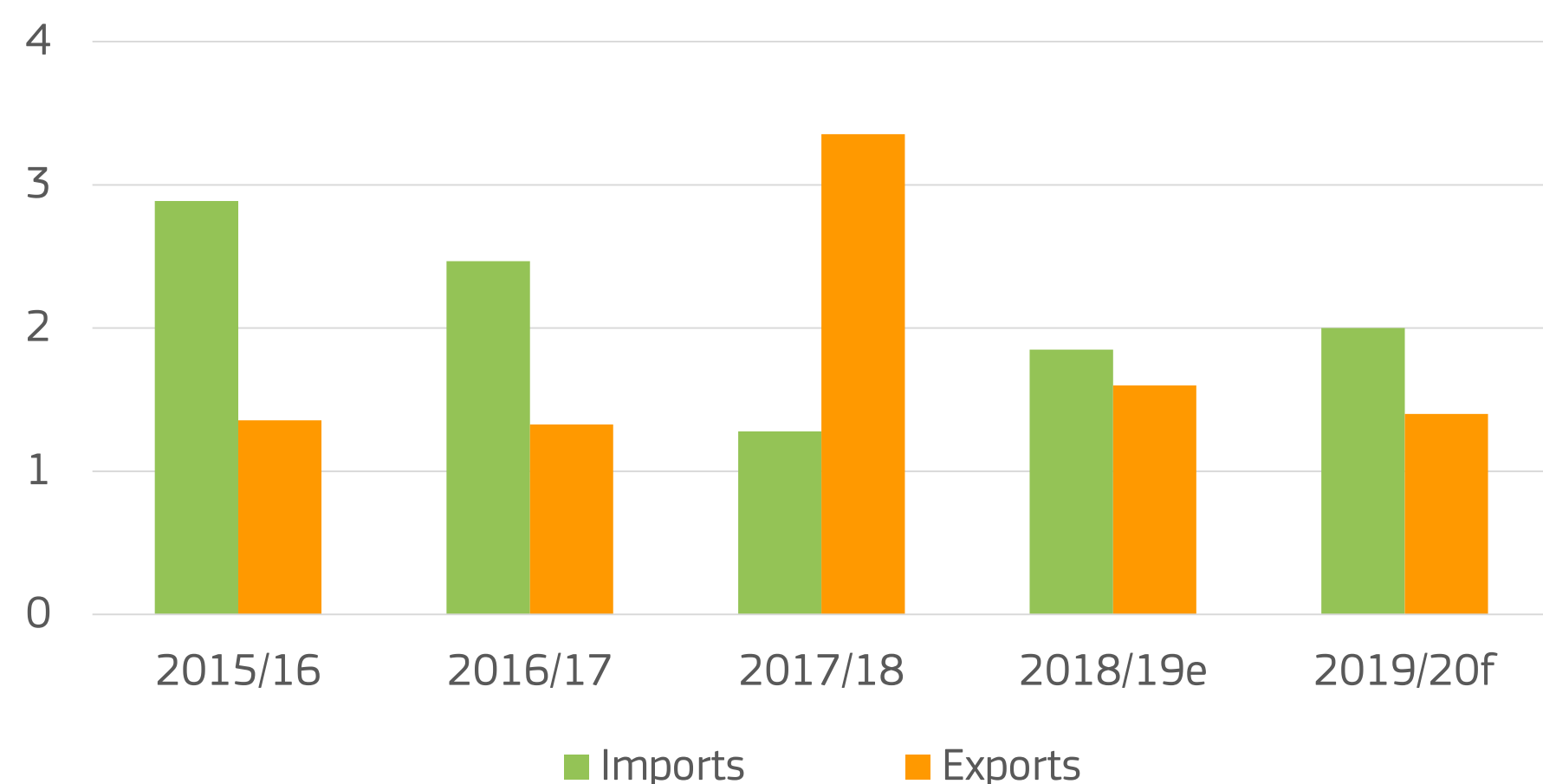
EU consumption to strengthen in 2019/2020



Source: DG Agriculture and Rural Development

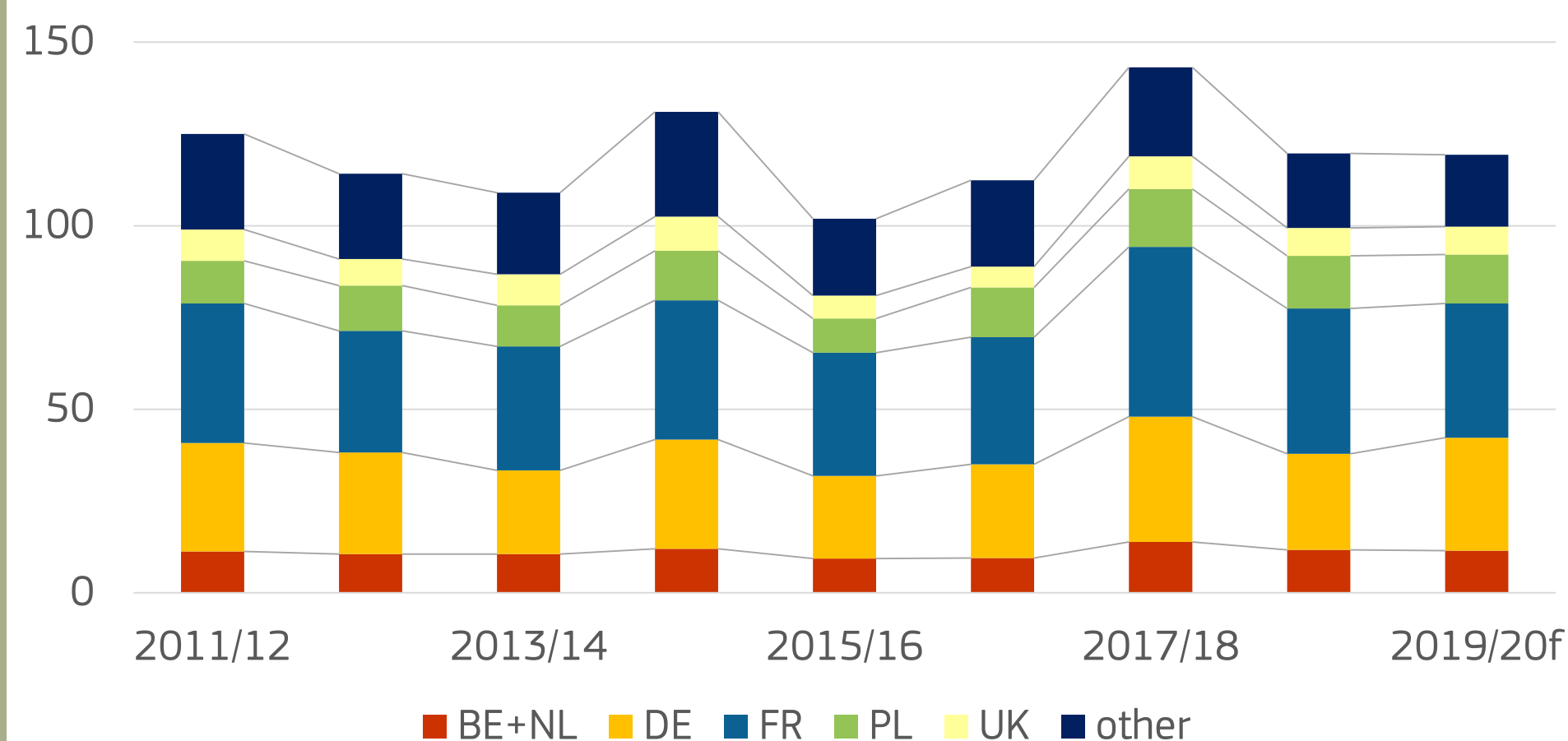
- EU protein crop area decreased in 2019/2020 compared to last year (-6%), mainly due to **lower** plantings of broad beans in the UK and field peas in Spain and Romania. By contrast, France increased field pea area compared to last year but the planted area is still below the average.
- Nevertheless, the **EU production of protein crops** should increase thanks to better yields for field peas and broad beans. It is now expected to reach **5.1 million t**. This corresponds to a recovery in total production of about 7%, but it is still slightly below the average (-0.5%).
- Given the increase in total production, **imports** should **slow down** after the 2018/2019 peak. Total 2019/2020 imports are still 43% higher than the average, largely driven by field peas, whose imports correspond to 40% of total EU imports of protein crops, mainly for feed purposes. Lupin imports are also on the rise (40% above average).
- After a contraction last year, EU **demand** is expected to **strengthen**, with **food demand** expected to continue its expansion on the domestic market. By contrast, feed use should decrease following a recovery in the production of EU feed cereals.

EU sugar trade (million t w.s.e.)



Source: DG Agriculture and Rural Development, based on Eurostat

EU sugar beet production (million t)



Source: DG Agriculture and Rural Development, based on Eurostat

2018/2019 sugar imports exceed exports again

- The 2018/2019 marketing year has now come to a close, with **EU sugar production set at 17.6 million t**, 17% below previous year but close to the 5-year olympic average.
- Imports gradually increased over the months and are estimated to reach 1.8 million t in 2018/2019, an increase of over 40% compared to the previous year. With 2018/2019 exports estimated at 1.6 million t (-52%), **the EU becomes again a net sugar importer**. The net exporter position of the EU in 2017/2018 remains an exception so far.
- Prices remain low, with EU prices at EUR 320/t and world white sugar prices at EUR 283/t in July.

2019/2020 sugar production forecast close to 2018/2019

- Induced by low prices, the 2019/2020 **sugar beet area decreased to 1.65 million ha**, i.e. 4.7% lower than the previous year, though still 2% above average.
- While dry conditions over the summer months were compensated only to a limited extent by sufficient rain in August, the **yield forecast** for the 2019/2020 crop is set **at 72.2 t/ha**, which is higher than the 69 t/ha in 2018/2019, but significantly below average (-4.6%). In particular, crops in northern Germany, France and Poland suffered from heatwaves and drought.
- The forecast for the 2019/2020 **sugar beet production** is set at **119 million t**, close to the previous year. Weather conditions in the coming weeks will be key for the sugar content of beets. **Sugar production** is forecast to remain comparable to the 2018/2019 level, **at 17.5 million t**.
- With forecast domestic supply below EU sugar uses, the EU trade balance could slightly further deteriorate in 2019/2020, with an increase of net imports to 0.6 million t.
- The **global deficit for 2019/2020 is forecast at 4.8 million t (ISO)**, compared to a surplus of 1.8 million t in 2018/2019. Global production is forecast lower than previously expected, due to adverse weather conditions in India and many Thai farmers switching to cassava production. Sugar production in Brazil is expected to remain similar to 2018/2019. However, the possible release of Indian stocks on the world market casts uncertainties in terms of price recovery over the global sugar markets, for this new marketing year.



SPECIALISED CROPS










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Market developments in the EU

OLIVE OIL 	2018/2019		2019/2020	
Production		+3.5%		-9.2%
Exports		+15%		-6.2%
Imports		-25%		-26%
Consumption		-11%		+11%

TOMATOES 	2018		2019	
Production		-7.0%		+3.9%
Exports		+3.9%		+31%
Imports		-2.3%		+8.4%
Consumption		-0.0%		+1.2%

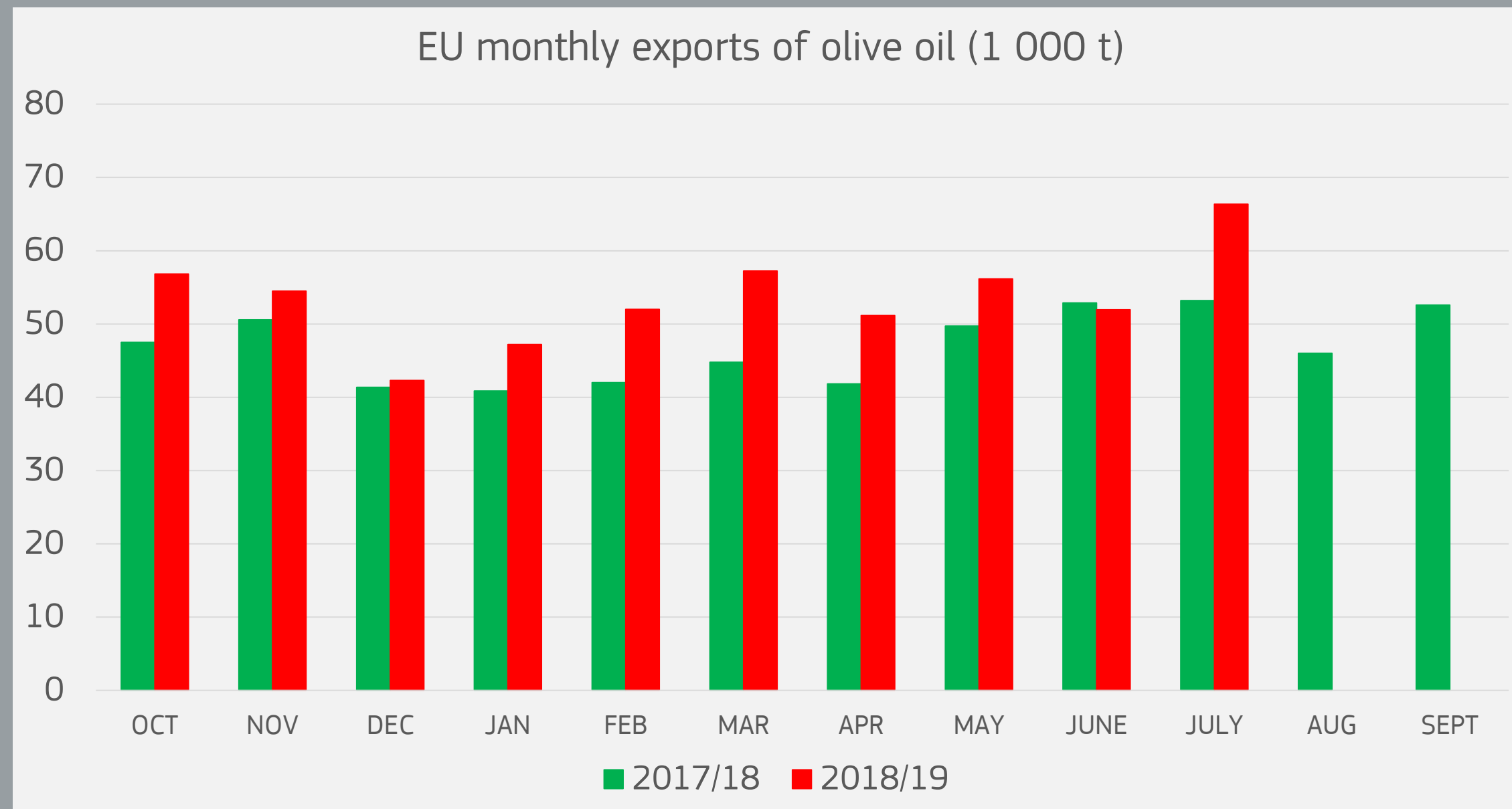
APPLES 	2018/2019		2019/2020	
Production		+38%		-18%
Exports		+106%		-27%
Imports		-30%		+5.3%
Consumption		+15%		-13%

PEACHES NECTARINES 	2018		2019	
Production		-8.3%		+3.7%
Exports		-27%		+4.3%
Imports		+3.6%		+8.0%
Consumption		-6.4%		+3.7%

Note: compared with previous season

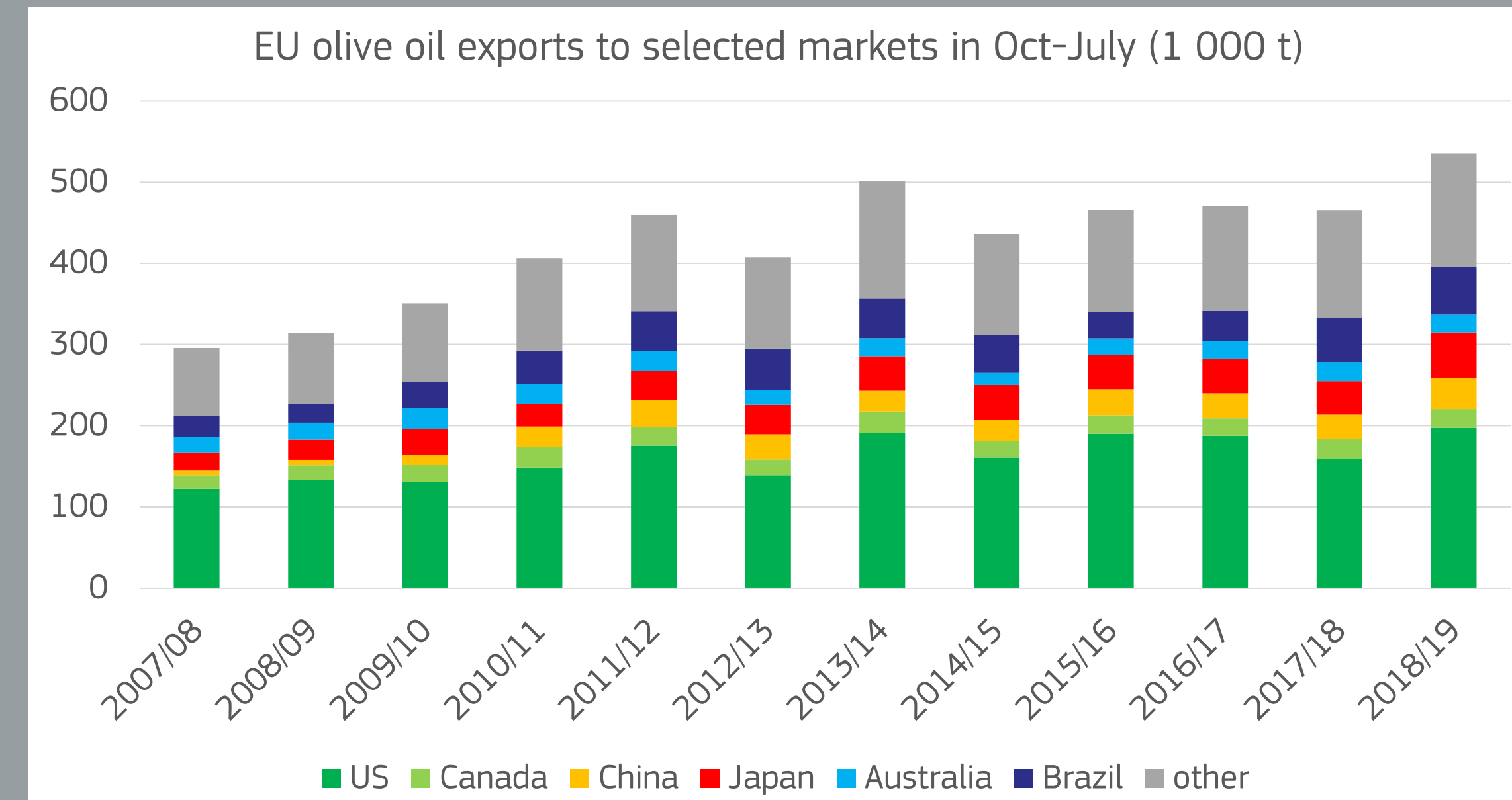
Olive oil

Record EU exports in the 2018/2019 campaign



Source: DG Agriculture and Rural Development, based on Eurostat

Continuously growing global demand for EU olive oil

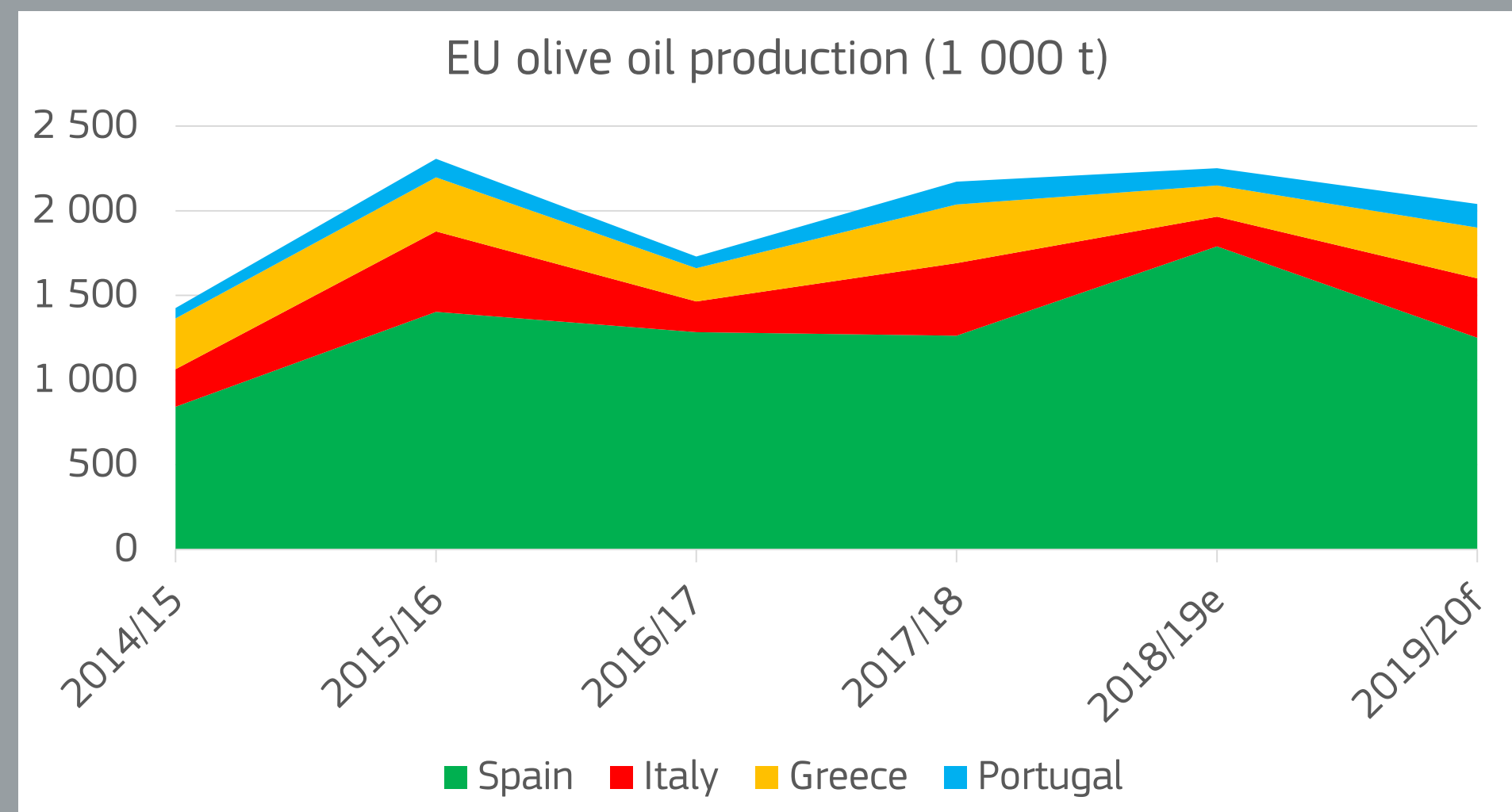


Source: DG Agriculture and Rural Development, based on Eurostat

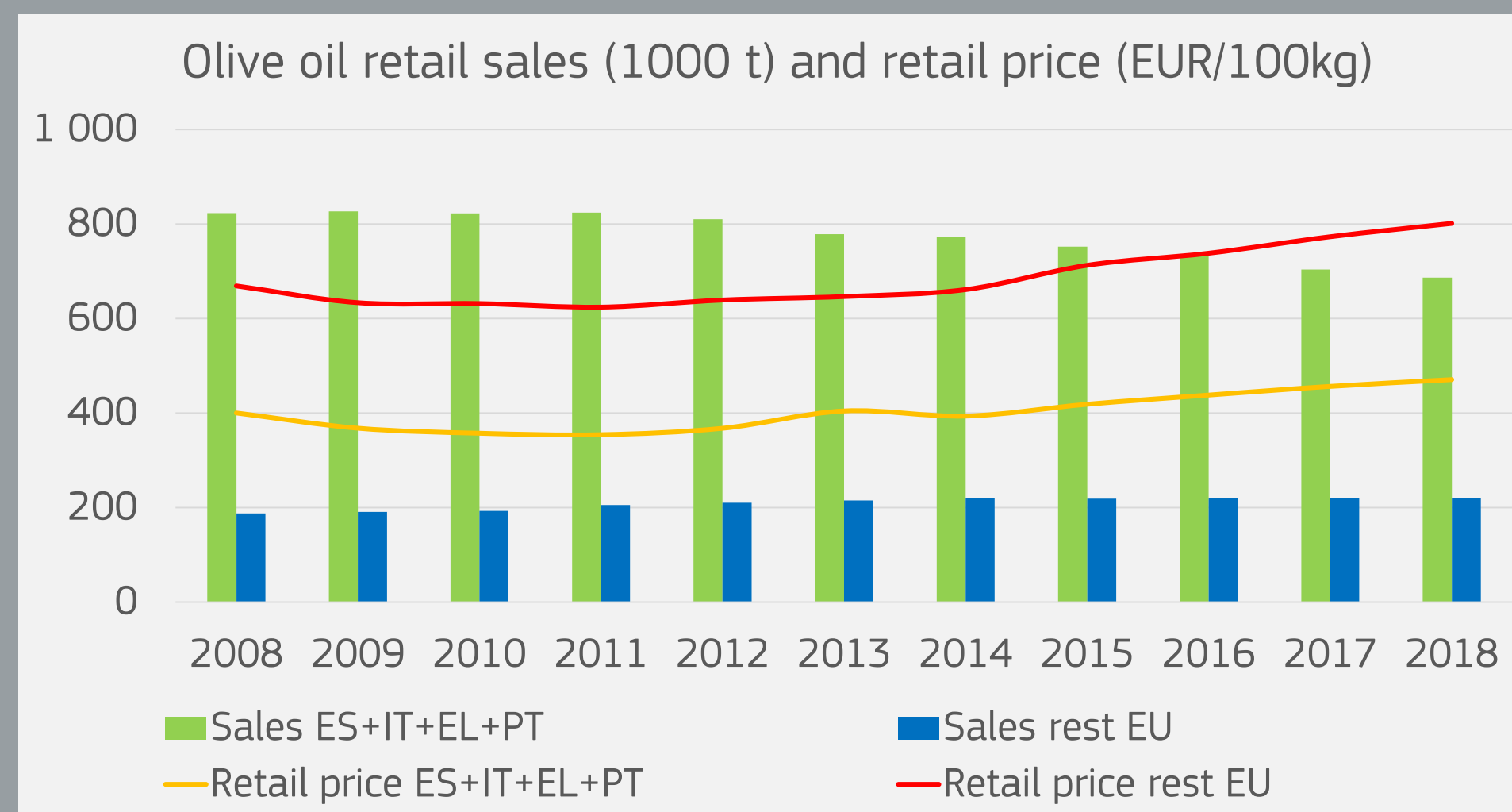
- In the **2018/2019 campaign**, the **EU production** reached close to **2.3 million t**. Large availabilities **boosted exports** which over Oct-July **grew by 15%**. In July alone, they grew by 25%, shipments growth to the US accounted for 90%.
- However, in Oct-July, **record shipments** were also recorded to Japan (+37%), China (+25%) and Brazil (+6%).
- The **production drop** in Italy, Greece and Portugal is likely to result in a **consumption decline** in these countries. By contrast, it is expected to increase in Spain as well as in the rest of the EU, incentivised by lower prices resulting from large supply.

- EU shipments to the **US, China and Japan** followed an overall increasing trend over the last decade. In addition, EU exports to **Brazil** grow since the campaign 2015/2016.
- Markets in **Canada and Australia** are less dynamic and EU exports there are rather stable over the years, although some annual variation is observed.
- Besides the main EU partners, shipments to **other destinations** are growing as well. In the last 10 years, they rose by 65% and contributed by 25% to the EU export growth.

Olive oil



Source: DG Agriculture and Rural Development, based on MS notifications



Note: Data corresponds to a calendar year

Source: DG Agriculture and Rural Development, based on Euromonitor International, Packaged Food, 2019

Production recovery in the Mediterranean region in 2019/2020

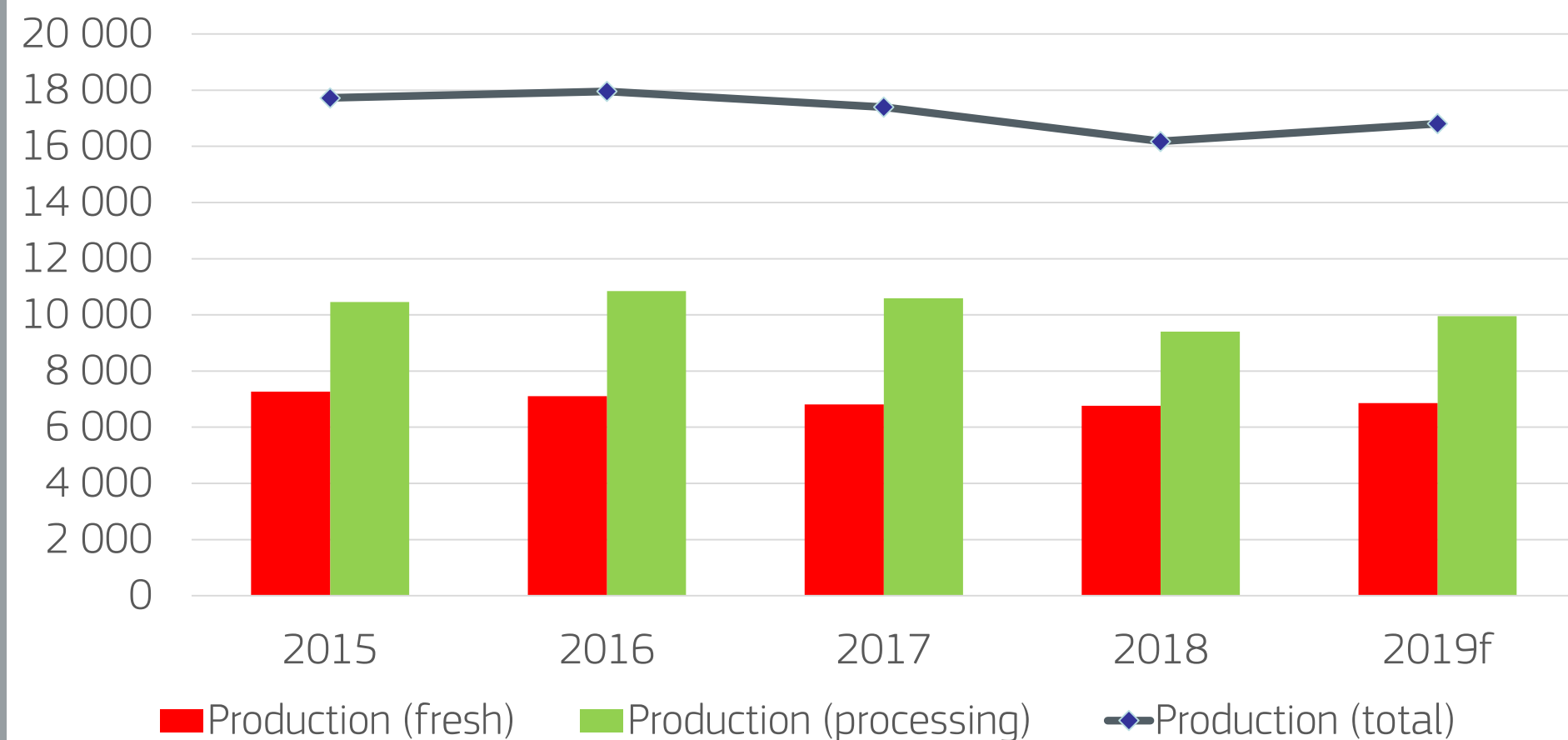
- 🌿 Around **2.1 million t** of olive oil is expected to be produced in the EU, a level **3% above** the last 5-year **average**. Thanks to the reported absence of olive fly and pests, as well as favourable weather conditions during the harvest, the **quality of olive oil** is also expected to be higher.
- 🌿 A **production recovery** is expected in almost the whole **Mediterranean region**. In **Italy**, thanks to favourable weather conditions, production is likely to be almost 20% above the last 5-year average (350 000 t). In **Greece**, the early estimates for the next campaign indicate a production increase of more than 60% compared to last year, around 11% above average (300 000 t).
- 🌿 In the **Iberian Peninsula**, mixed developments are observed. In **Portugal**, **record yields** and thus **harvest** are expected (close to 50% above average, 140 000 t), while there will likely be a **production drop in Spain** after a record harvest last year, 5% below average (1 250 000 t).
- 🌿 On the **world market**, a **recovery** is expected in **Tunisia** (around 350 000 t). Therefore, abundant supply, together with high levels of stocks in the EU, will contribute to satisfying demand during the next campaign.

Exports above average and higher domestic consumption

- 🌿 In the next campaign, the current high level of exports to the **US**, implying a **stock piling**, is expected to **halt**. Due to the US share in **EU exports**, these are likely to decline compared to 2018/2019. Nevertheless, they should **remain above average** (+7%, around 610 000 t), thanks to the sustained growth towards Asian markets.
- 🌿 The **large availabilities** in the EU are expected to result in a **decrease of EU import demand** (100 000 t).
- 🌿 **Low prices** could **favour an increase of domestic consumption**. For retail, trends show that consumers in the main producing countries are more price sensitive than in the rest of the EU. Therefore, consumption in the main producing countries could grow faster (+6%) than in the rest of the EU (+4%), mainly thanks to the recovery in Italy and Greece.

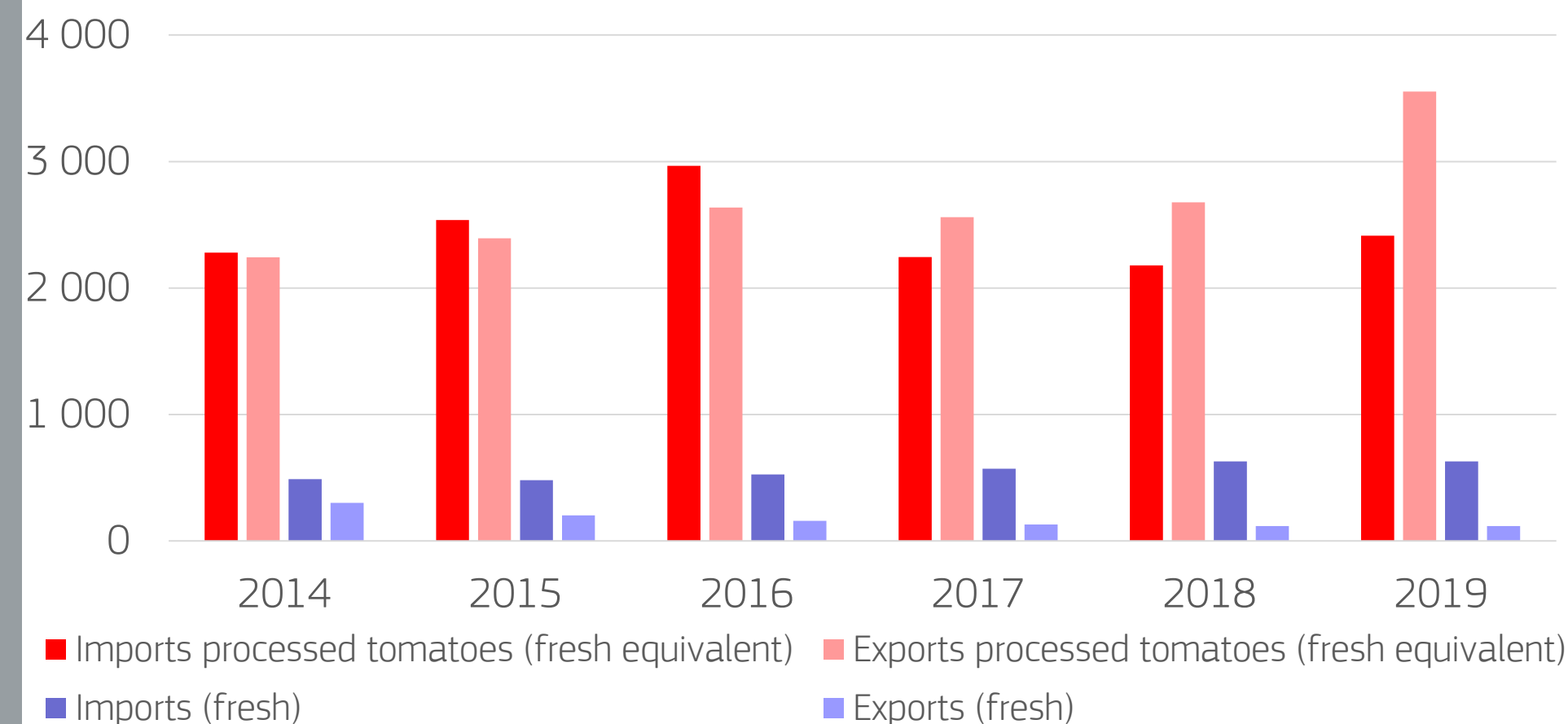
Tomatoes

EU tomato production (1 000 t)



Source: DG Agriculture and Rural Development, based on Eurostat and Tomato Europe

EU tomato trade (1 000 t)



Source: DG Agriculture and Rural Development, based on Eurostat

Increase in EU production of tomatoes mainly for processing

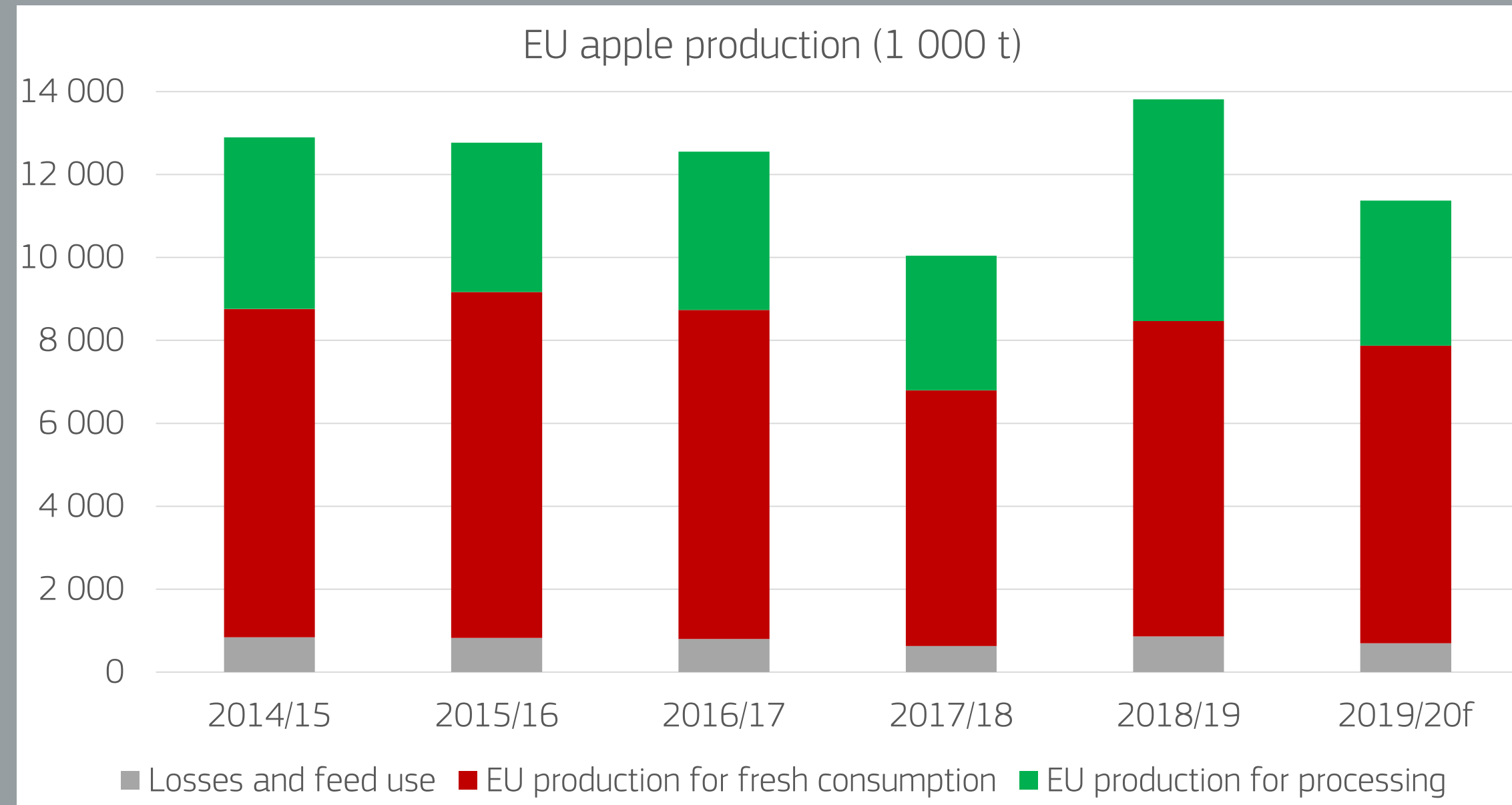
- 🍅 The **total EU production of tomatoes** is estimated to **increase** to around 16.8 million t in 2019 (+4% compared to 2018), driven by a rise in the production of tomatoes **for processing** (+6%). The most significant growth is located in Spain (+14%), thanks to very favourable weather conditions (good ripening, mild temperatures). Nevertheless, the level of total EU tomato production in 2019 lies 2% below the last 5-year average.
- 🍅 The production of **tomatoes for fresh consumption** is expected to only **slightly increase** in 2019 (+1% compared to 2018) resulting from, on the one hand, an increase of production in small producing countries and, on the other hand, a reduction in larger producing countries (damaged greenhouse production in Spain, higher production of smaller tomato varieties leading to lower volumes, replacement of tomatoes by other vegetables in greenhouses).
- 🍅 The per capita consumption of fresh tomatoes is expected to slightly increase in 2019 (+1%) compared to 2018, whereas the (apparent) consumption of processed tomatoes is expected to slightly decrease (-1%).

Strong increase in EU exports of processed tomatoes

- 🍅 After several consecutive years of rising shipments, the **EU imports of fresh tomatoes** are expected to **remain stable** in 2019, compared to 2018.
- 🍅 By contrast, **EU imports of processed tomatoes** (in fresh tomato equivalent) are expected to **increase** by 11% in 2019, in particular imports of prepared and preserved tomatoes from China, but also from Chile and Ukraine.
- 🍅 The low EU market prices of processed tomatoes and the favourable current dollar/euro exchange rate **drive EU exports of processed tomatoes up**, reducing stocks. EU exports, in fresh tomato equivalent, are likely to increase by 33% in 2019 compared to 2018 (+43% compared to average). In particular, exports to Africa (Libya, Sudan, South Africa) are expected to increase.

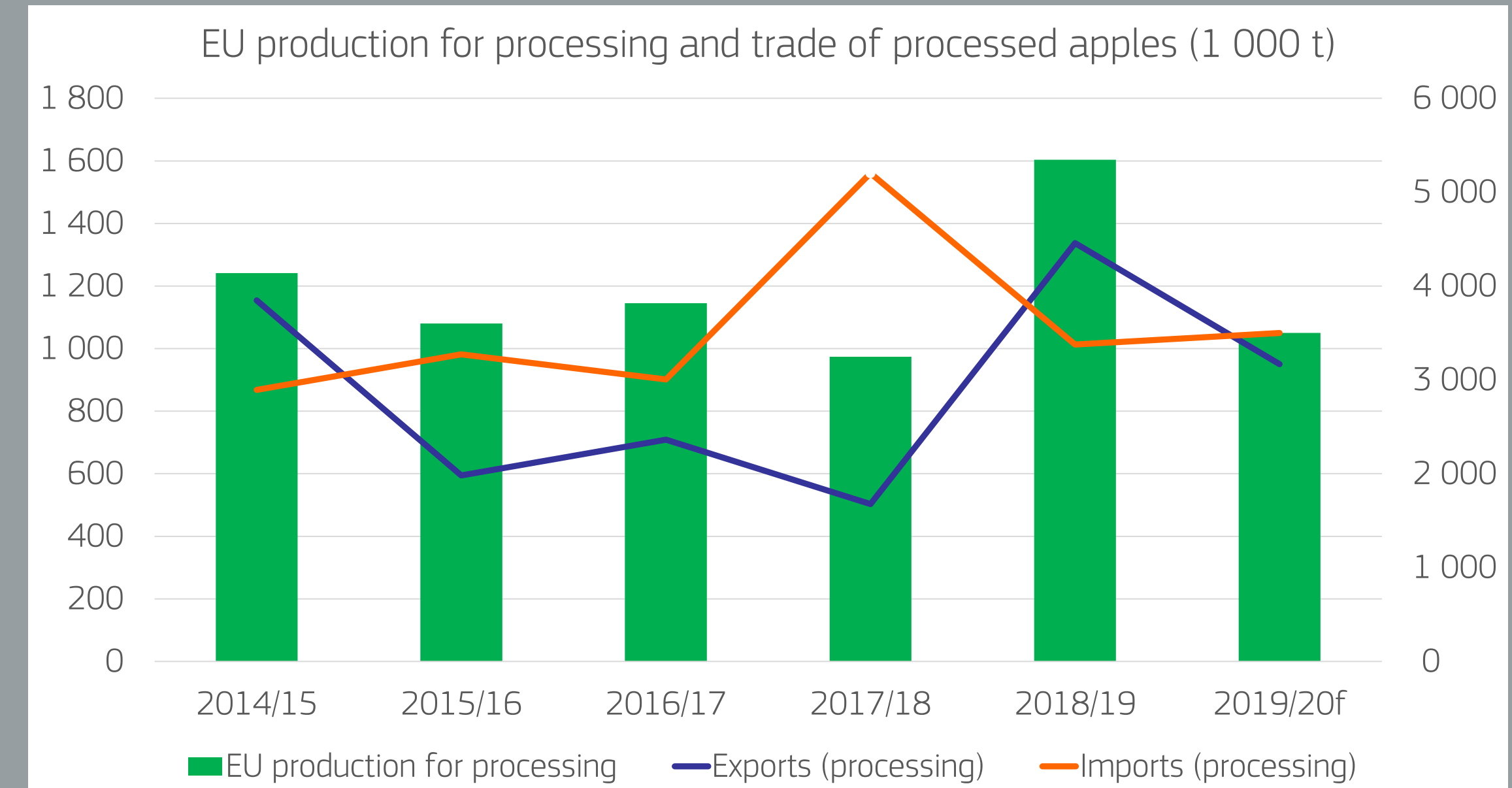
Apples

Below average apple production in the EU



Source: DG Agriculture and Rural Development, based on Eurostat

Strong EU exports of processed apples



Source: DG Agriculture and Rural Development, based on Eurostat

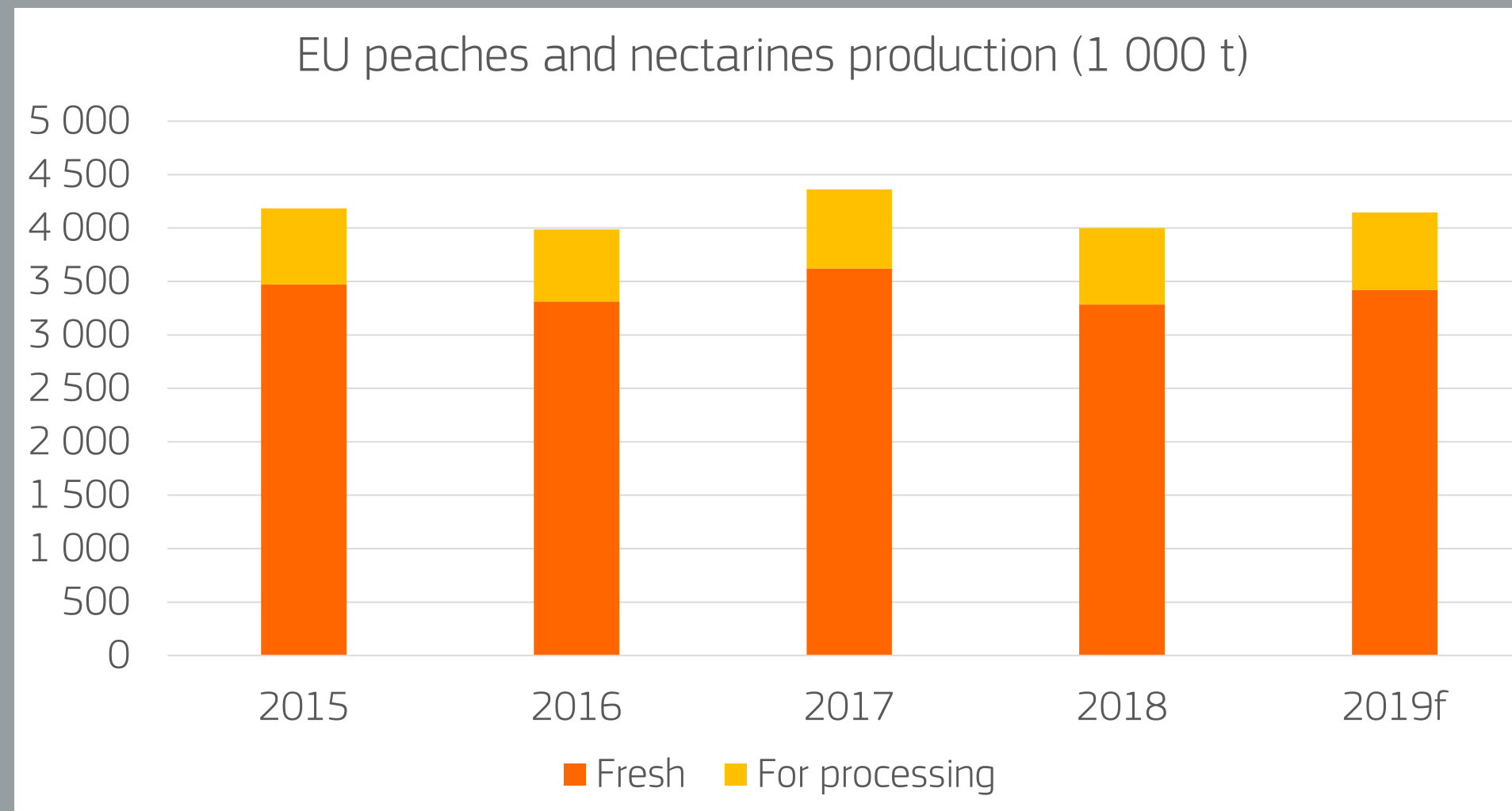
🍏 The EU production of apples is expected to reach 11 300 t in the marketing year 2019/2020, which is **8% below** last 5-year arithmetic **average** (-18% compared to the 2018/2019 record year) driven by a **large reduction in Poland** (-32%) due to damage caused by spring **frost**. By contrast, the other main producing countries are likely to increase production compared to 2018/2019 (Germany +6%, France +9%, Italy +1%).

🍏 Thanks to the high production in 2018/2019, exports increased by 65% compared to 2017/2018.

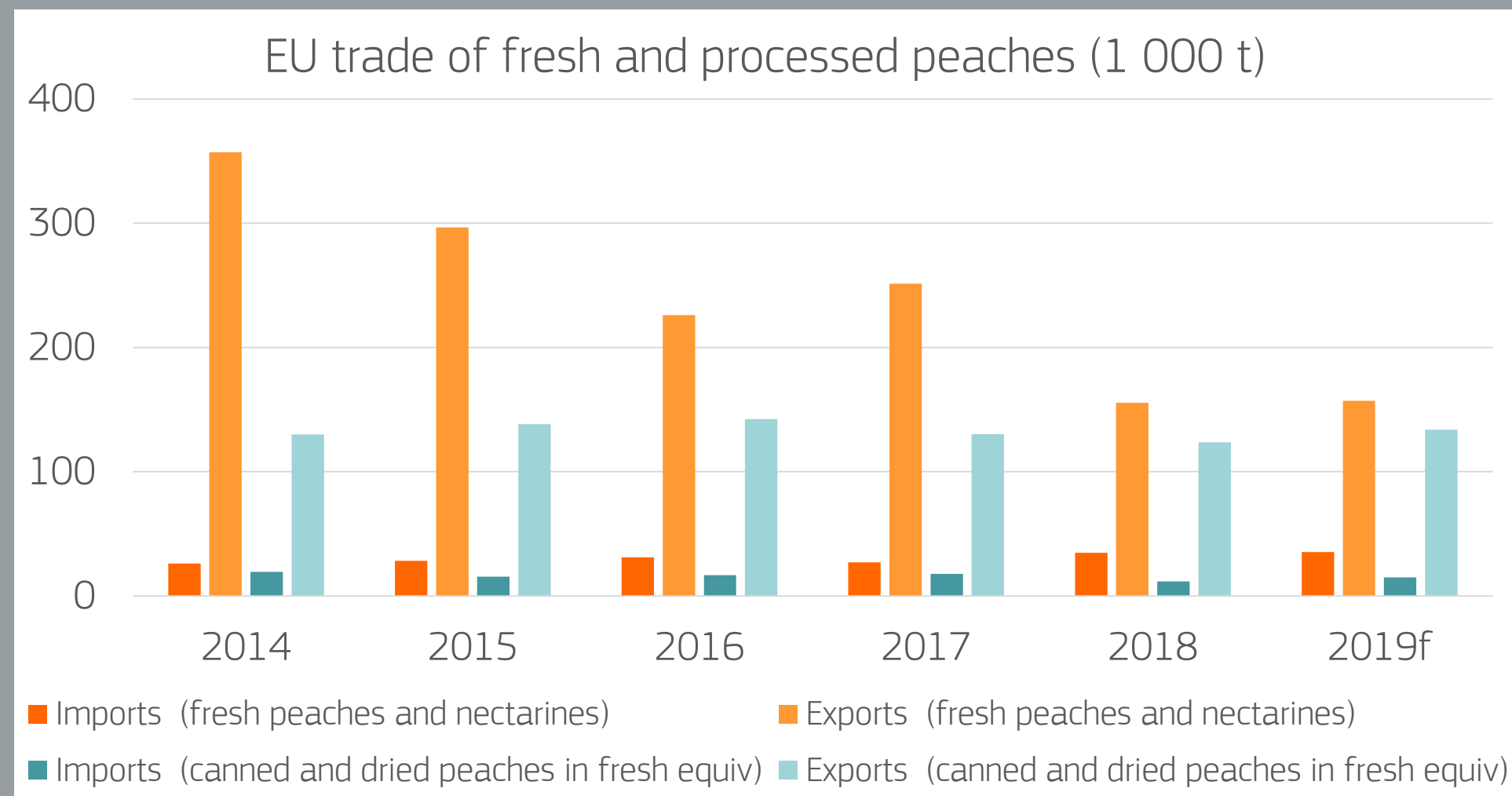
Similarly, in 2019/2020, with the reduction in production, **exports of fresh apples** are expected to **decrease** significantly (-26% compared to 2018/2019 and 16% below average).

🍏 For processed apples, EU exports in 2018/2019 reached almost twice the average level due to the record harvest. In particular, exports to the US, the EU's largest export market, increased significantly. **Strong EU exports of processed apples** are forecast this year too (11% above average), driven by high stocks.

Peaches & Nectarines



Source: DG Agriculture and Rural Development, based on Eurostat



Source: DG Agriculture and Rural Development, based on Eurostat

2019 EU production slightly above last year

- 🍑 The **EU production of peaches and nectarines** is estimated to reach around 4.1 million t in 2019 (+4% compared to 2018, stable compared to the last 5-year average) driven by favourable weather conditions (no significant frost impact, good blossoming) in the main producing countries.
- 🍑 Low prices during the first weeks of the season for the early varieties in Spain led to an increased processing of peaches that were originally aimed for fresh consumption.
- 🍑 The per capita **consumption of fresh peaches** is expected **to increase** to 6.4 kg in 2019 (+4% compared to 2018), driven by both the high supply of good quality peaches and the warm temperatures during summer, encouraging consumption.
- 🍑 The per capita consumption of processed peaches is expected to remain stable at 1.2 kg.










Stable low EU exports of fresh peaches and nectarines

- 🍑 The increase in the EU production of fresh peaches is not likely to result into significantly higher exports in 2019 (+1% compared to last year low at 157 000 t) due to the rising per capita consumption and processing of peaches. EU exports should remain close to 40% below average.
- 🍑 The imports of fresh peaches should remain stable in 2019 (+18% compared to average).
- 🍑 By contrast, **EU exports of canned and dried peaches** are expected **to increase** (+8%) driven by increased supply of raw fruits and stable EU consumption of processed peaches.
- 🍑 EU imports of canned and dried peaches are forecast to grow significantly in 2019 to 15 000 t (+28% compared to 2018, -34% compared to average) after a strong decline in 2018.



MILK AND DAIRY PRODUCTS

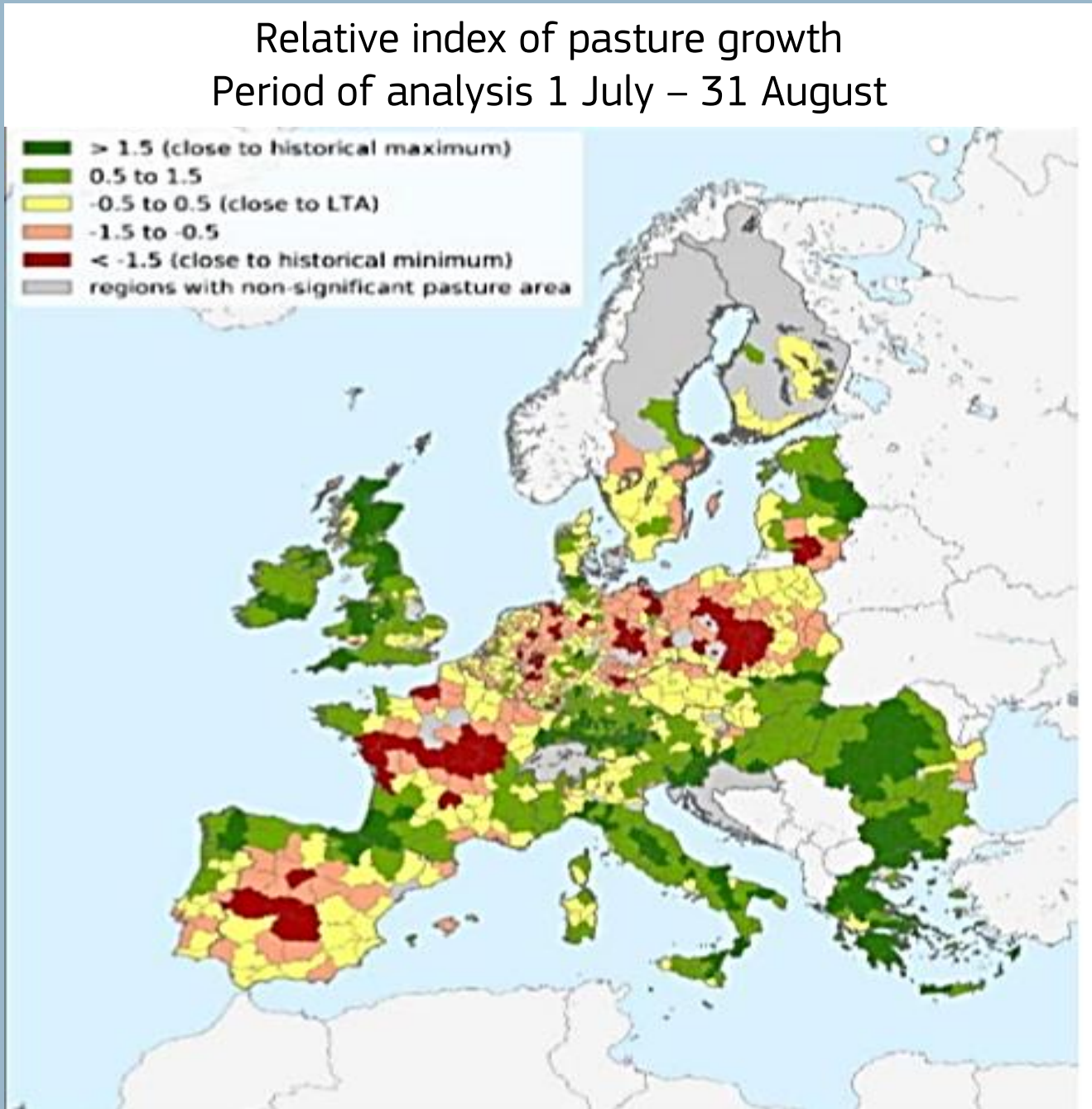
Market developments in the EU


DAIRY PRODUCTS 	2019		2020	
Production		+0.6%		+0.6%
Exports		+4.8%		-4.1%
Imports		+7.4%		+0.0%
Consumption		+0.5%		+0.3%


MILK 	2019		2020	
Milk collection		+0.5%		+0.7%
Dairy herd		-0.7%		-0.4%


Note: compared with previous year

Warmer than usual summer in many parts of the EU

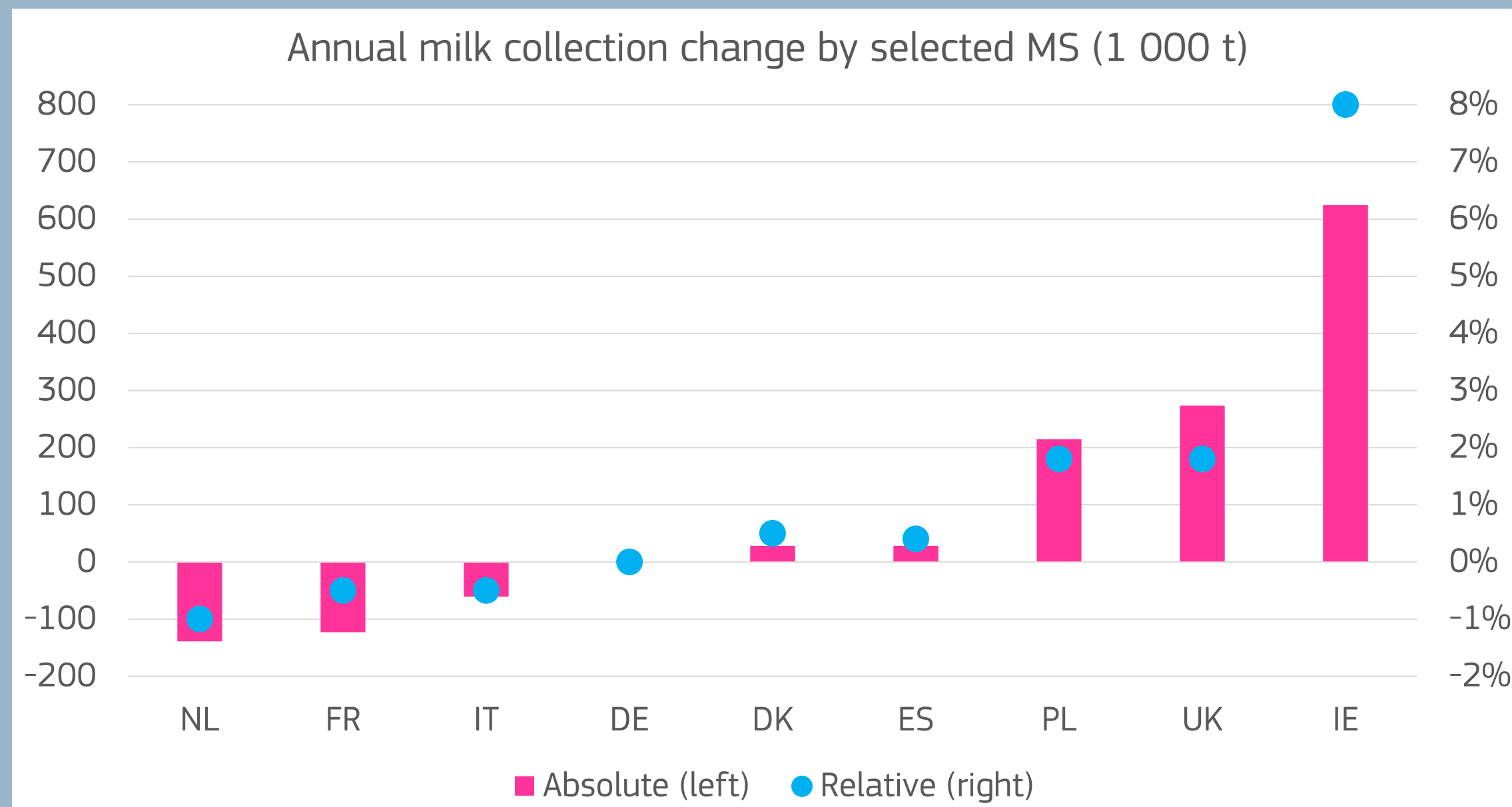


 Over the summer, **warmer** than usual temperatures and **rainfall below average** constrained grass development in many parts of the EU. In particular eastern Germany, northern Poland and parts of France and Spain were impacted. By contrast, the weather was more favourable in Ireland, the UK and several other MS. **Dry conditions** over the **summer compromised also the production of silage maize**, in particular in central and northern France, northern Germany and western Poland.

 **Milk yield growth** in 2019 is expected below last year (+1.1%) due to the drought and lower purchases of compound feed.

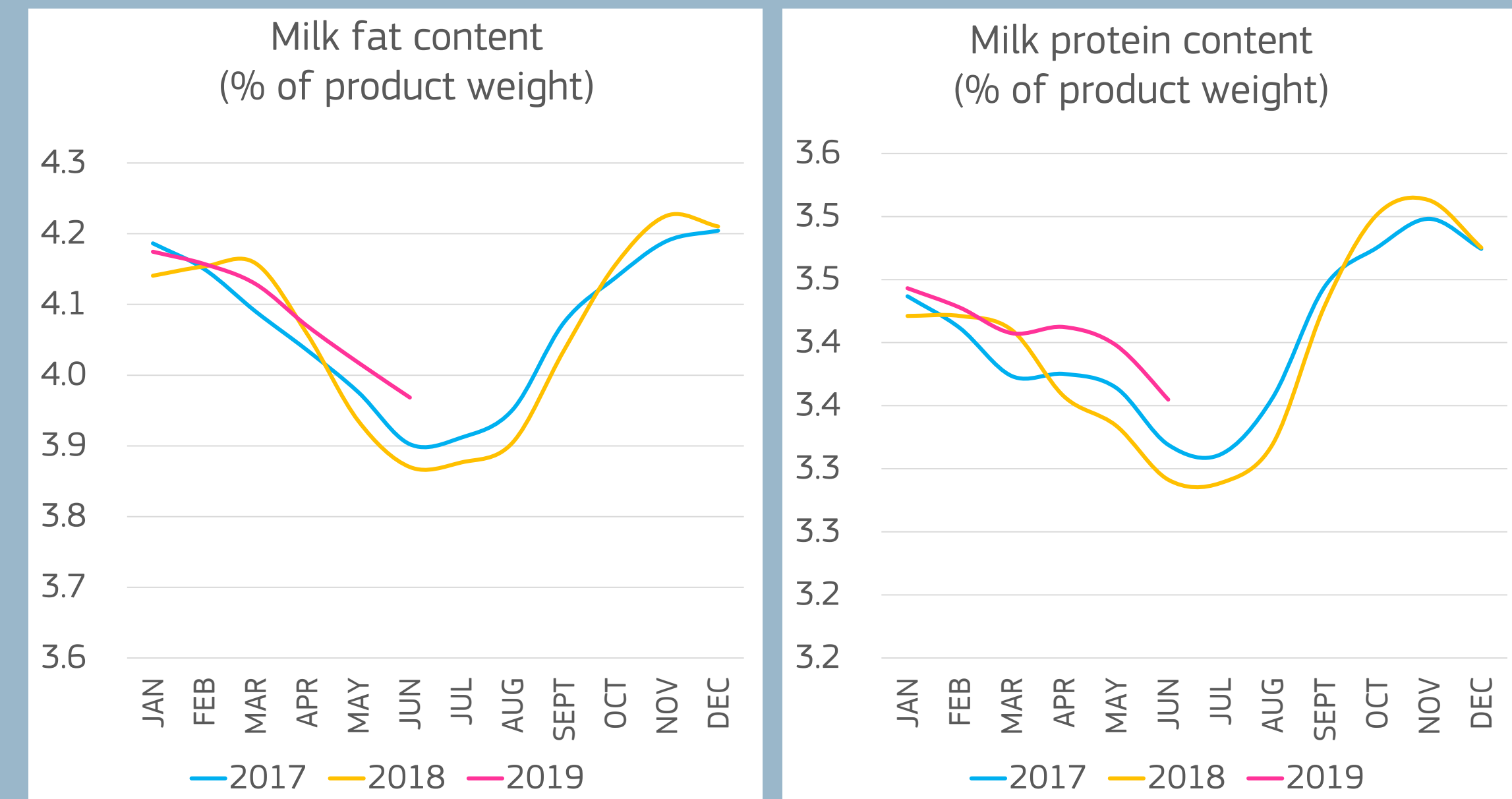
 In 2019, the **decline** in the **dairy herd** is expected to continue at a **slower pace** (-0.7% /2018) as in Jan-June, cow's slaughterings were 5% below last year.

EU milk collection to grow slightly in 2019



Source: DG Agriculture and Rural Development, based on Eurostat and MS notifications

Increasing availabilities of milk fat and protein



Source: DG Agriculture and Rural Development, based on Eurostat

In 2019, the **EU milk collection** could **grow by only 0.5%** compared to 2018, to close to **158 million t**, due to the decline in the dairy herd and the expected slowdown in yield growth. The expected decline in France (-0.5%), the Netherlands (-1%) and Italy (-0.5%) might be compensated by an increase in Denmark (+0.5%), Poland (+2%), the UK (+2%) and particularly in Ireland (+8%). The German milk collection is expected to remain stable.

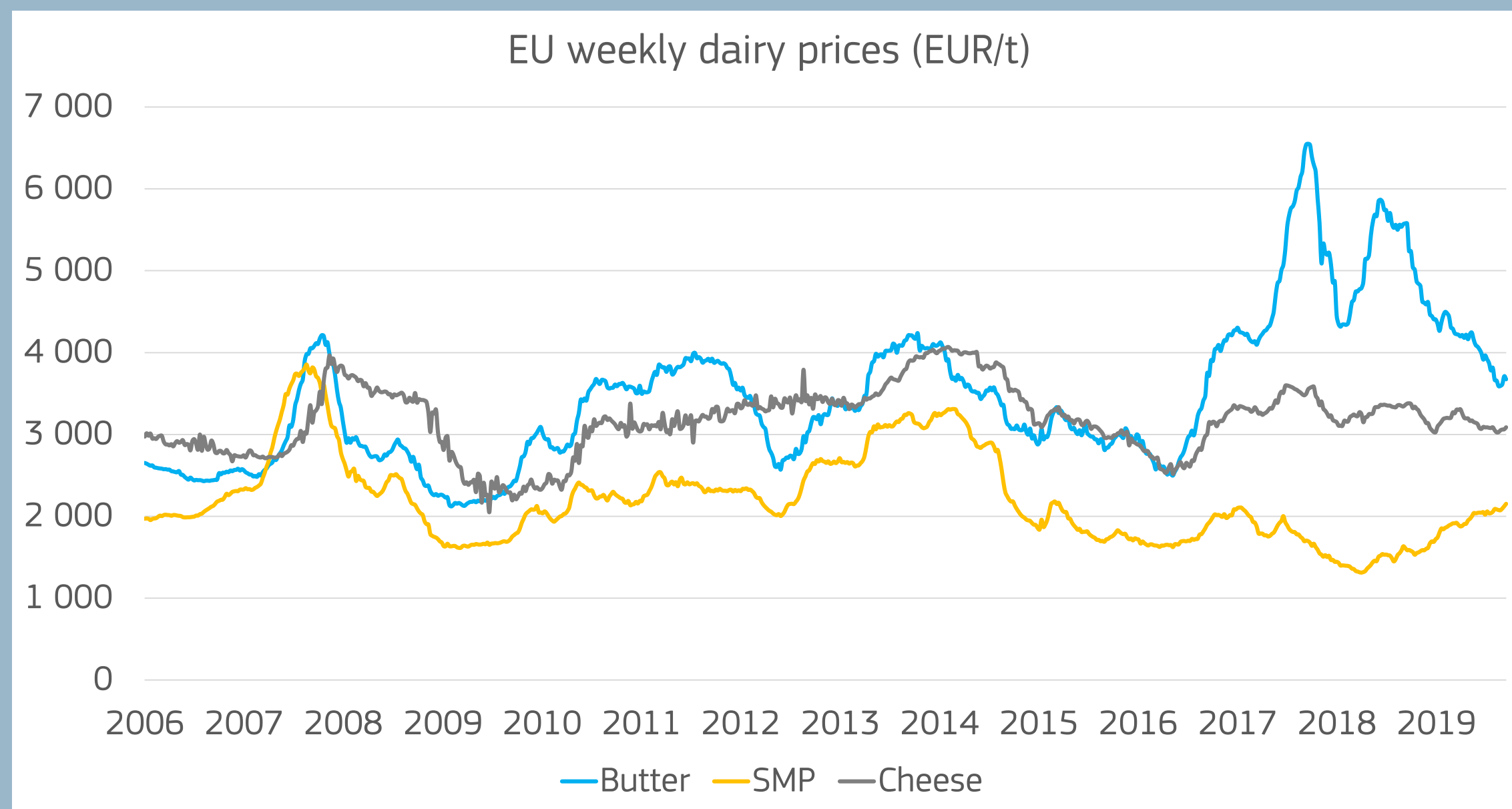
Assuming normal weather condition and sustained demand, in **2020 a further growth of EU milk collection (+0.7%)** is expected, driven by increasing yields (+1.2%) while the decline in cows numbers could slow down (-0.4%).

Feed quality, change in the feed ration, as well as a growing share of MS with higher milk solid content in the EU milk pool (i.e. Ireland), contributed to a **significant growth of the milk solids** in Jan-June. **Milk fat** grew by **1.3%** and **milk protein by 1.5%**. Growth was particularly strong in Ireland (+10% in milk fat, +14% in milk protein) thanks to good grass availability.

The higher availability of **milk solids** should allow a higher growth rate of **dairy products' production** despite the moderate increase of the milk collection.

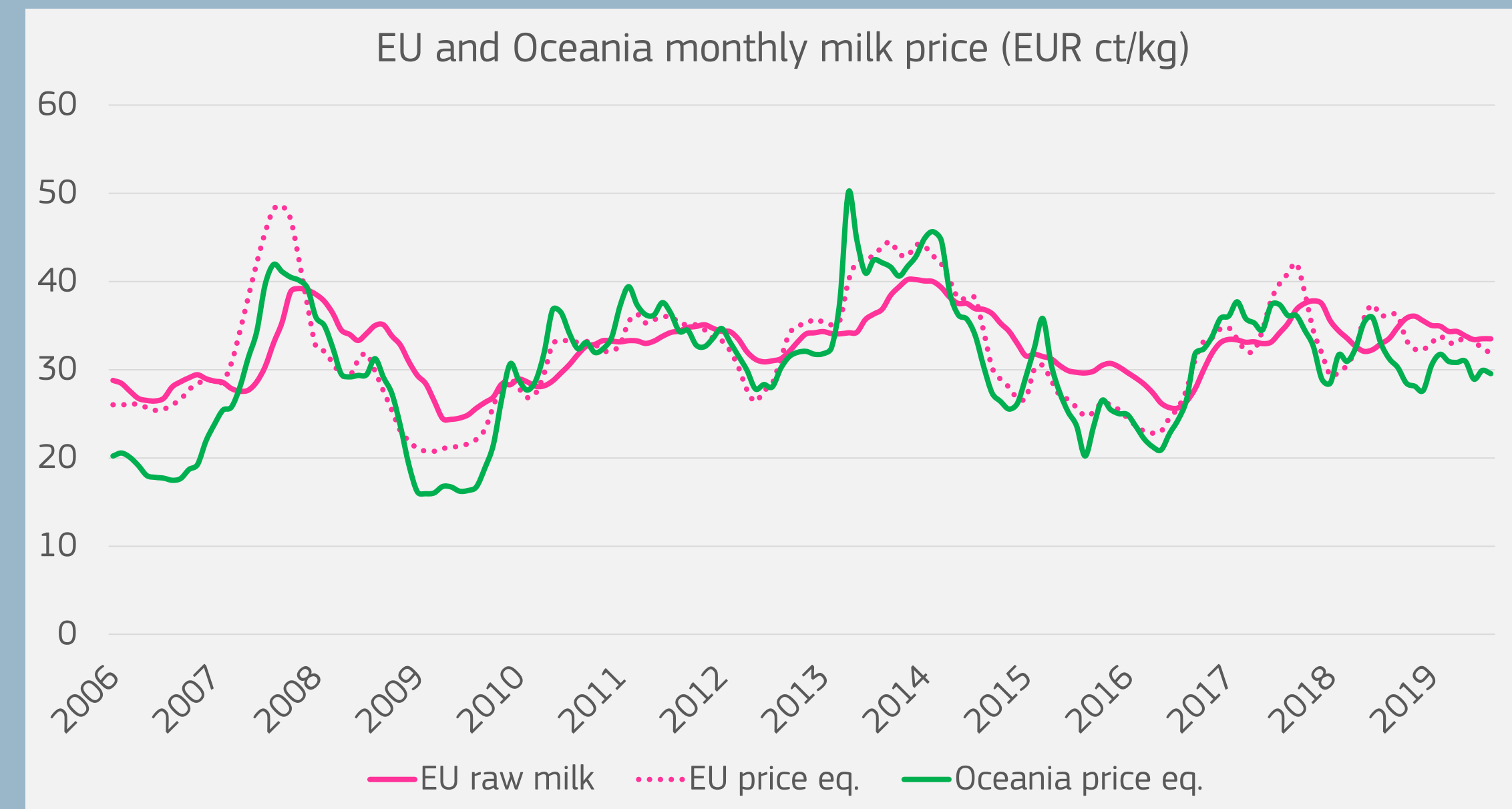
Milk and dairy prices

Prices of dairy products




Source: DG Agriculture and Rural Development, based on Eurostat and MS notifications


Prices of milk




Note: The milk price equivalent is based on butter and SMP prices


Source: DG Agriculture and Rural Development, based on Eurostat

 Since October 2018, when the **EU price of SMP** reached its bottom (around EUR 1 500/t), it has been continuously **increasing**. In mid-September, it reached **EUR 2 150/t** (+36% over the same period last year).

 At the same time, the **EU butter price** dropped sharply. In mid-September, it was **slightly below EUR 3 700/t** (-34% below the same period last year), **closing significantly the unusual gap** between fat and protein prices observed in the past two years.

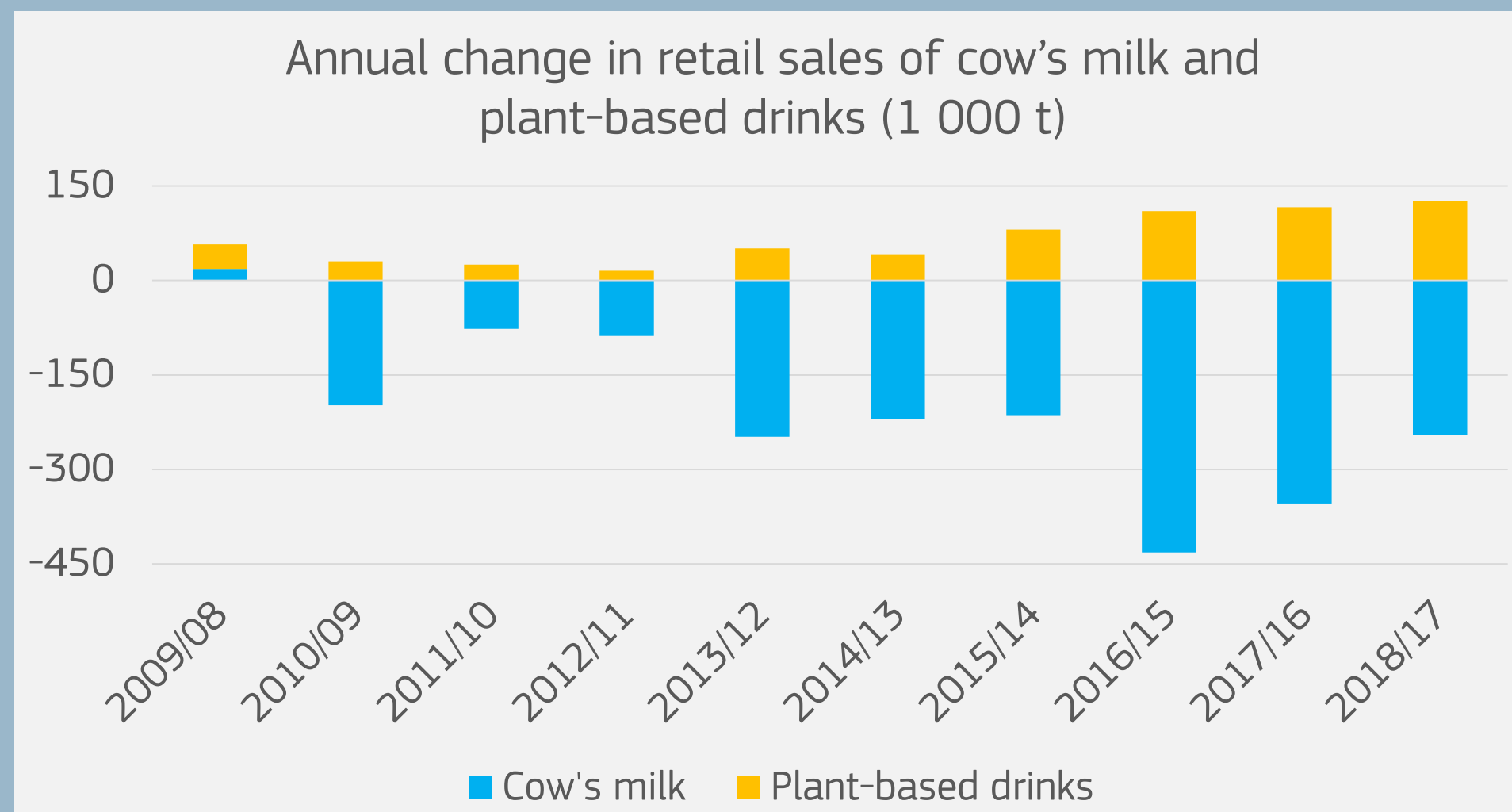
 The cheese market remains relatively stable, and since mid-June, the **EU price of cheddar** is slightly below **EUR 3 100/t**, **9% below** the same period last year.

 In August 2019, the **average EU raw milk price** reached close to **EUR 33/100kg**, at the level of last year and almost 4% above 2014-2018 average. Since 2018, it remains above the Oceania milk price equivalent.

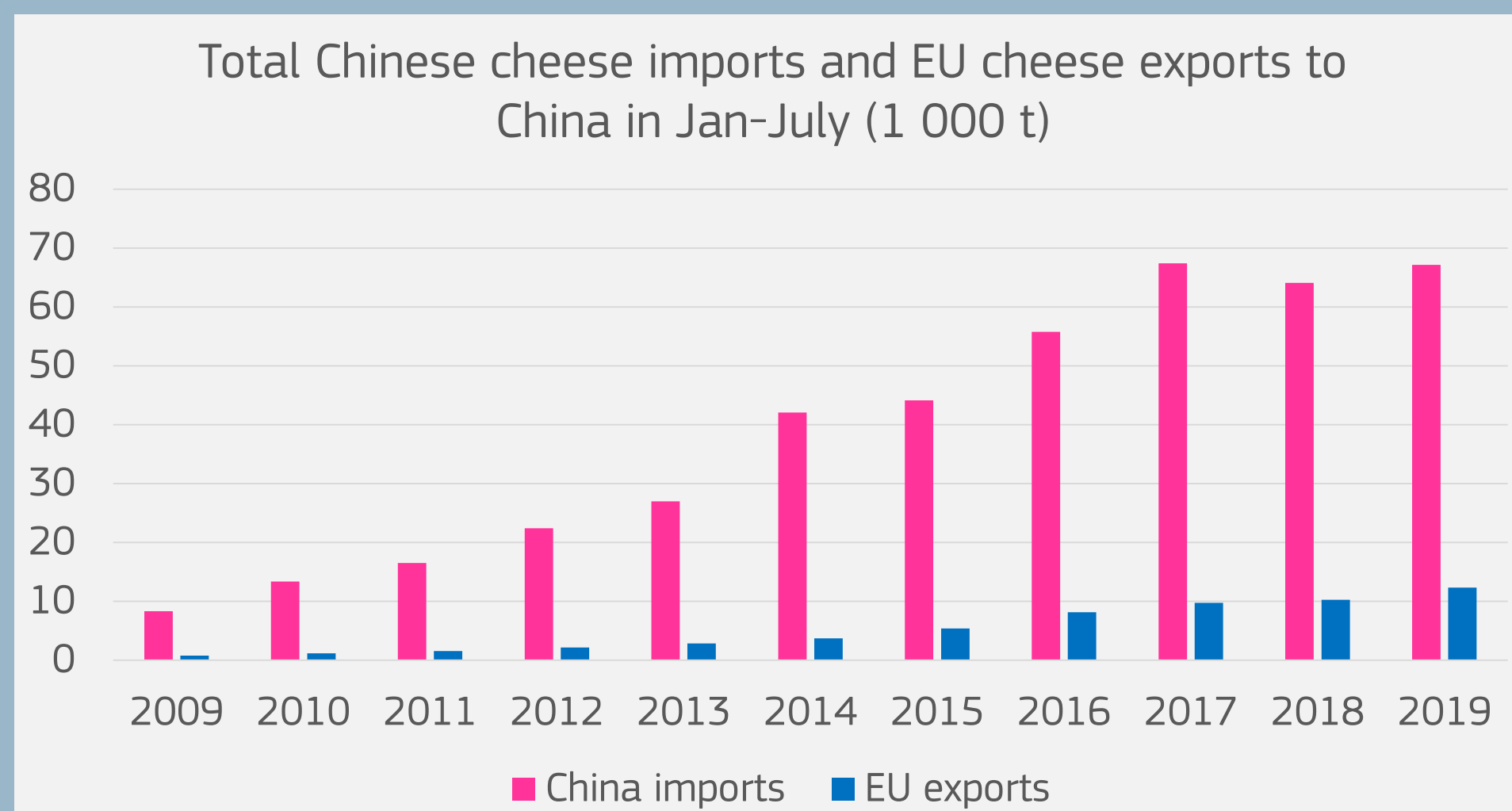
 The increase in the SMP price does not compensate for the reduction in the butter price, thus the **EU milk price equivalent is oriented downwards (5% below last year)**.

 The **seasonality** of the milk production and **good demand** for the EU dairy products should lead to an increase of EU milk prices for the rest of the year.

Dairy products



Source: DG Agriculture and Rural Development, based on Euromonitor International, Packaged Food, 2019



Source: DG Agriculture and Rural Development, based on Global Trade Atlas (China imports) and Eurostat (EU exports)

Increasing demand for differentiated types of drinking milk in the EU



The EU consumption of drinking milk continues declining. This, together with the drop of exports in 2018, contributed to a further production decline on an annual basis (-2%). In **2019**, the **declining trend is expected to slow down (-1%)** thanks to increasing exports (+20% in Jan-July). However, exports represent only a small share of the drinking milk production (around 3%).



There is a **higher segmentation** in the drinking milk market, which reflects the **increasing demand for organic and other production systems** (e.g. hay milk, pasture-based milk, GM-free).

Nevertheless, the production decline is expected to continue in 2020 (-1%).



This market is also challenged by the **increasing sales of plant-based drinks**, although at EU level they only account for around 4% of cow's milk sales. Some dairy producers are adding these products into their portfolios. However, this rise is lower than the loss in drinking milk sales.

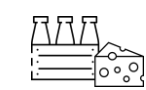
Relative stabilisation in the EU cheese market in 2019



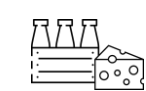
In Jan-July, the **increasing shipments to the US (+7%)** drove **higher EU cheese exports (+2%)**, together with Japan (+5%) and Switzerland (+1%). Although lower in absolute terms, the **most dynamic increase** was recorded to **China (+20%)**, where most of imported cheese is processed. This demand is expected to grow further.



Over the year, despite the expected slowdown of shipments to the US, the sustained demand in other markets might contribute to an overall **increase of exports close to 2%**, while EU **domestic use** is expected to remain **stable**, resulting in a **production increase of close to 1%**.



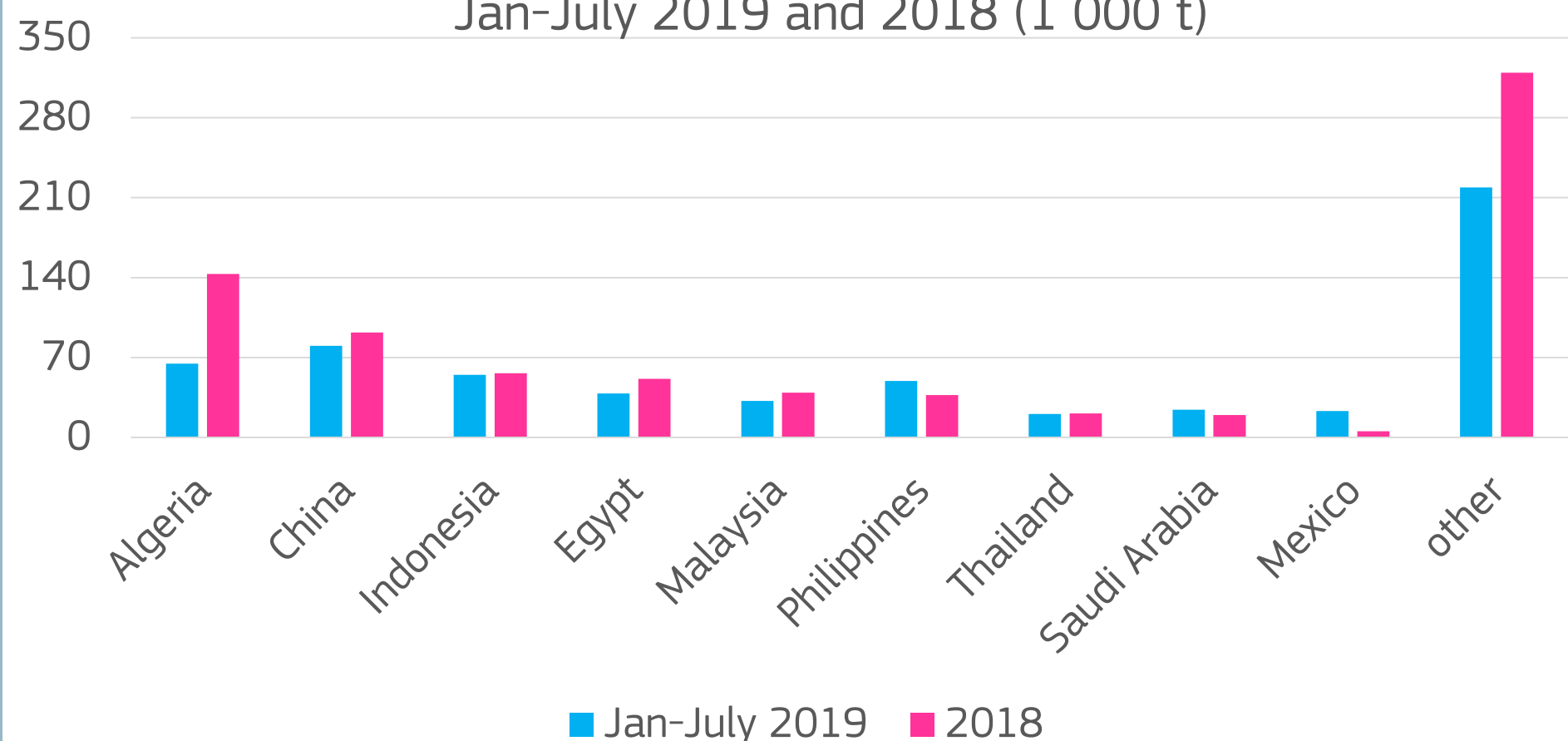
In **2020**, the slowdown of demand is expected to continue and EU exports are expected to grow by around 1.5%, leading to a production growth of 0.6%.



The production of **whey, a by-product of cheese**, is also expected to grow by close to 1%, out of which around 60% will likely be used for feeding purposes and 10% be exported, mainly to China. In Jan-July, China accounted for one third of EU whey exports, recording an 8% increase over the same period last year. On an annual basis, exports are expected to remain stable.

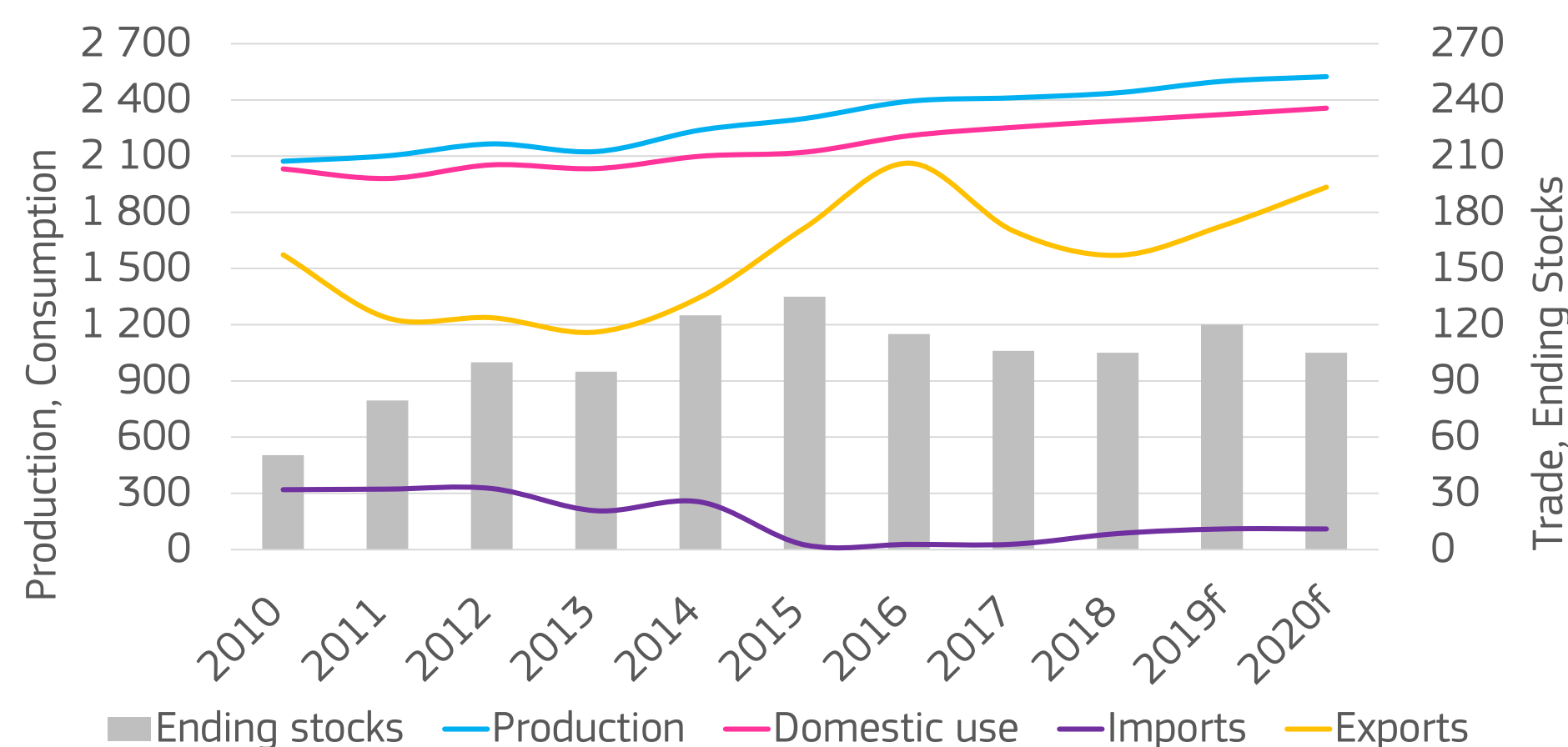
Dairy products

EU SMP exports by main destinations
Jan-July 2019 and 2018 (1 000 t)



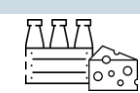
Source: DG Agriculture and Rural Development, based on Eurostat

EU butter balance sheet (1 000 t)

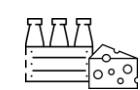


Source: DG Agriculture and Rural Development, based on Eurostat

Record level SMP exports in 2019



In Jan-July, **EU SMP exports were almost 30% above** the same period last year. Shipments to China (1st export destination) grew the most in absolute terms, contributing by 24% to the overall increase. Due to **lower stocks availability and increasing prices**, **EU exports** are expected to **slow down towards the end of the year**. Nevertheless, 2019 exports might reach **a record level (950 000 t)**. Boosted exports and stable domestic demand are expected to drive **EU production higher (+3%)**. In 2020, lower availabilities, due to lower stocks, and a further recovery in SMP price are likely to **reduce EU exports**. However, assuming sustained world demand, they could still remain above the level of 2018 when EU intervention stocks started to be sold. This, together with a stable domestic demand is expected to contribute to **further production growth in 2020 (+5%)**.

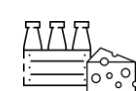


On the contrary, in Jan-July, **EU WMP exports continued declining (-19%)**, although the reduction could slow down. Despite the sustained domestic use (+3%), EU production is expected to decline by 5% in 2019.

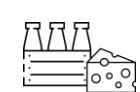
A competitive EU butter price boosts EU exports



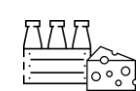
In 2019, due to the **increased availability of milk fat**, a further growth of **EU butter production** is expected **(+2.5%)**. With the convergence of butter prices in the EU and Oceania, EU exports have become more competitive, therefore the **shipments** could **grow by 10%** in 2019 after two years of a decline. Already in Jan-July, EU shipments grew by 19%. Shipments to the US (24% of total EU exports) grew by 45%, followed by Japan (+57%) and China (+13%).



Due to high butter prices in 2018, some food businesses replaced butter with vegetable fat for certain processed products. Despite the decline in EU butter price this year, time will be needed to revert this trend, therefore a **slower growth in the domestic use is expected in 2019 and 2020** (below 1.5%). In 2020, production is likely to grow by 1%.



Despite increasing exports and domestic use in 2019, the rise in production will probably not be fully absorbed, resulting in **stock increase (+15 000 t)**, i.e. around 25% of the production increase.








The higher availability of milk fat is also expected to drive **a recovery in the cream production (+2.5%)**.

MEAT PRODUCTS


















©olgakr iStock

Market developments in the EU

BEEF 	2019		2020	
Production		-0.5%		-0.7%
Exports		+8.0%		+5.0%
Imports		-3.0%		+2.0%
Consumption		-0.9%		-0.8%

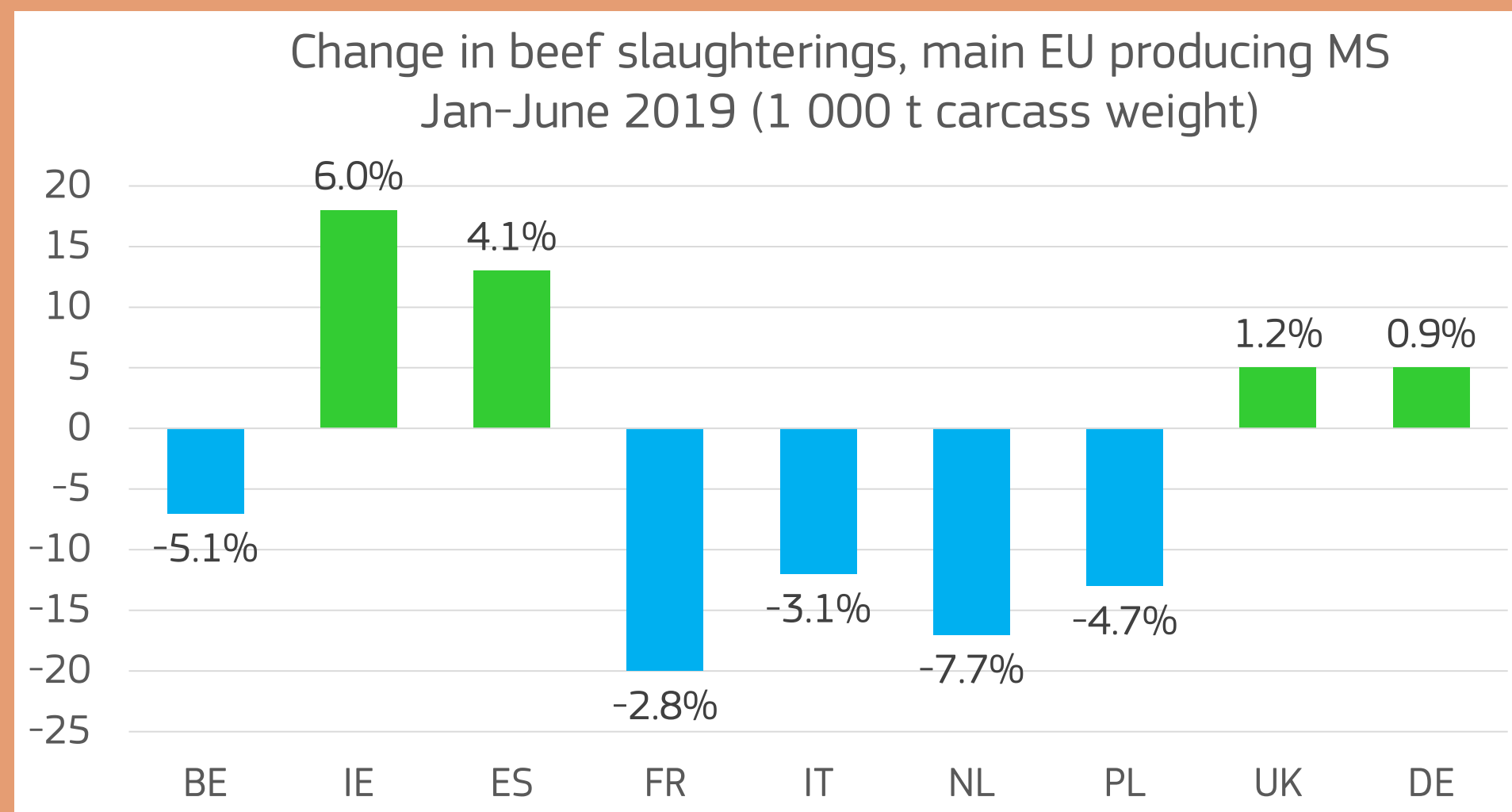
PIGMEAT 	2019		2020	
Production		+0.4%		+1.5%
Exports		+20%		+13%
Consumption		-2.0%		-0.3%

POULTRY 	2019		2020	
Production		+2.5%		+1.7%
Exports		+4.5%		+2.7%
Imports		+6.0%		+2.0%
Consumption		+2.4%		+1.6%

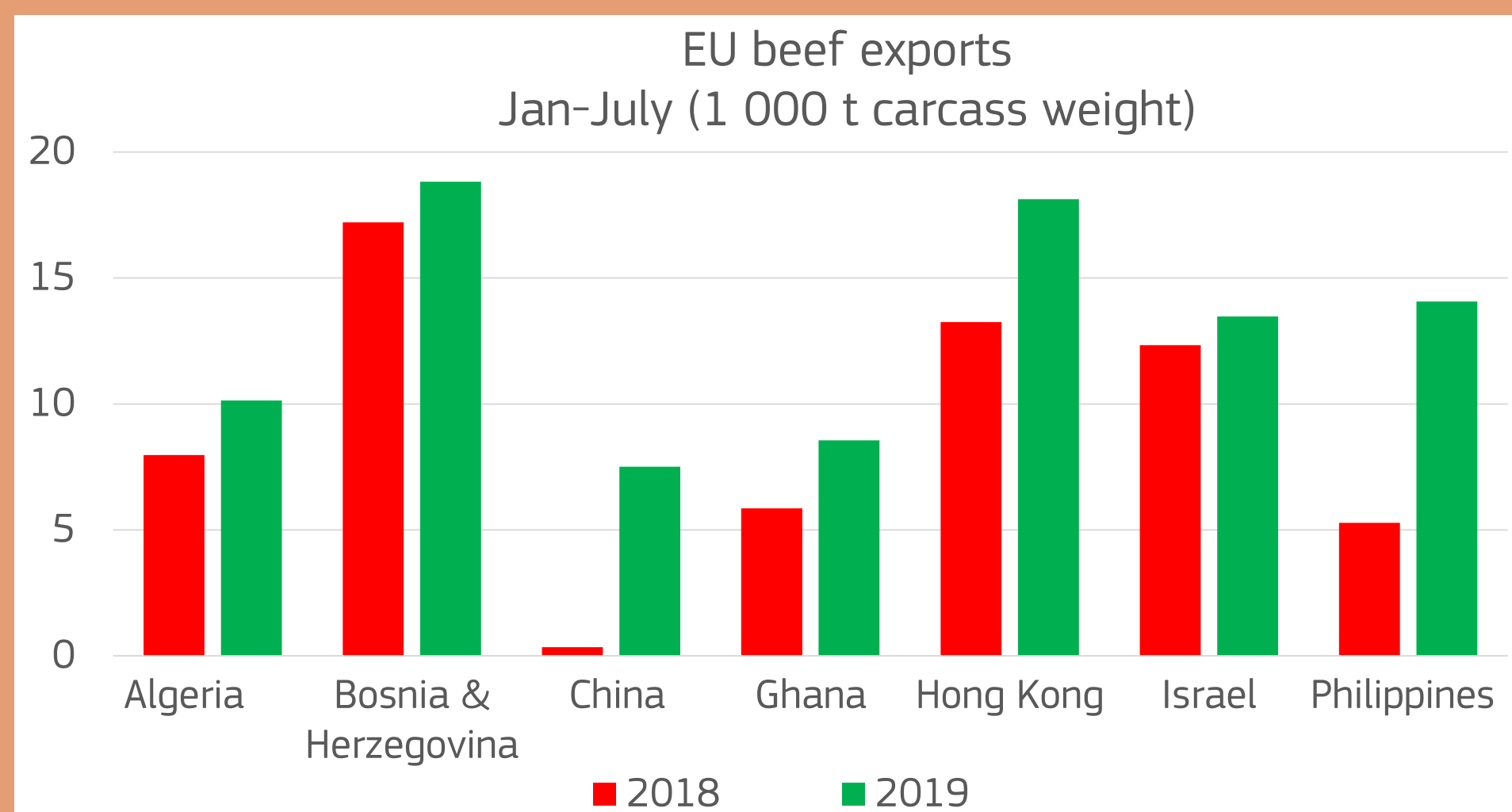
SHEEP & GOAT 	2019		2020	
Production		+1.0%		-1.0%
Exports		+11%		+2.0%
Imports		-16%		+6.0%
Consumption		-2.1%		-0.1%

*Note: compared with previous year.
Net production and meat trade.*

Beef and veal

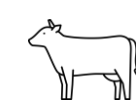


Source: DG Agriculture and Rural Development, based on Eurostat

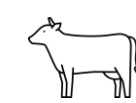


Source: DG Agriculture and Rural Development, based on Eurostat

EU beef production down in 2019 and 2020

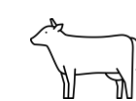


The May-June Livestock survey confirms the decreasing trend of the suckler cow herd in the main producing MS, except for Poland. No data for Spain yet available.

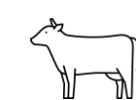


EU slaughterings declined by 0.9% in the first half of 2019. Smaller breeding herds and lower numbers of store cattle in key producing countries (FR, NL, BE) as well as the continuation of the effect of the beef scandal in Poland push production downward. On the other hand, additional slaughterings are recorded in Ireland and the UK in anticipation of a potential Brexit. Better forage conditions compared to last year will limit the end of season slaughterings. The decline in the number of slaughtered animals in the EU is partly compensated by an increase in the average slaughter weight. Moreover, the Turkish market for live exports stays closed and those animals need to find their way to the internal market instead. Overall, **EU gross beef production is expected to decrease by 0.9% in 2019 and by a further 0.7% in 2020.**

EU beef exports on the rise



EU beef exports are expected to increase by 8% in 2019, thanks to an increase of volumes to existing partners (e.g. the Philippines, Bosnia, Israel) and access to new markets (China). **EU exports of live animals** are negatively affected by the challenges of the Turkish market, which started in autumn 2018. This should lead to a **decline of live exports by 16% in 2019.**

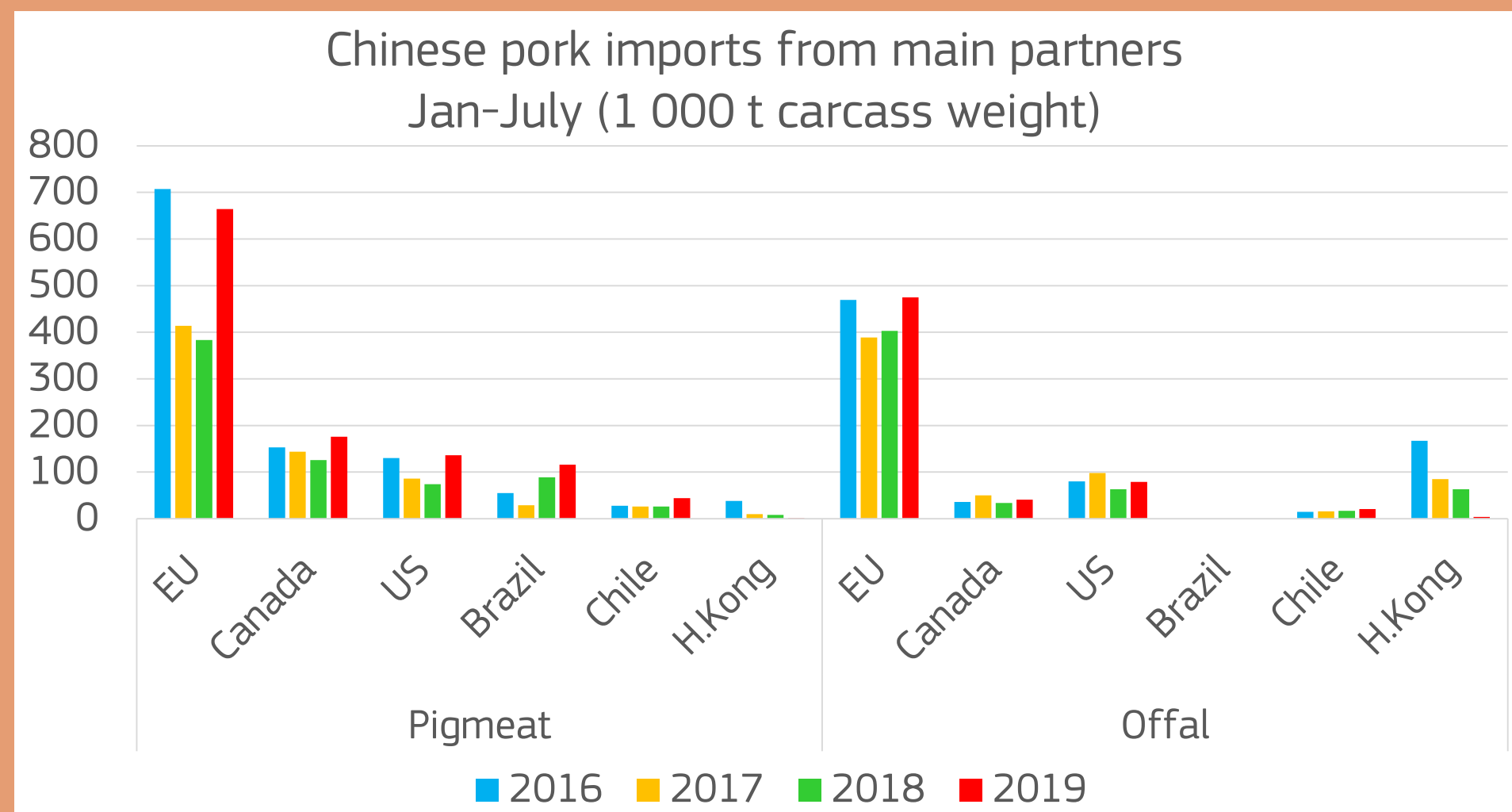


The increase of **EU beef imports** from Argentina and Namibia in the first half of the year could not compensate the decline in imports from Uruguay and other countries, which are diverting their produce to Asia. Imports from Brazil are catching up. This is expected to result in a **decrease of imports by 3% in 2019.**

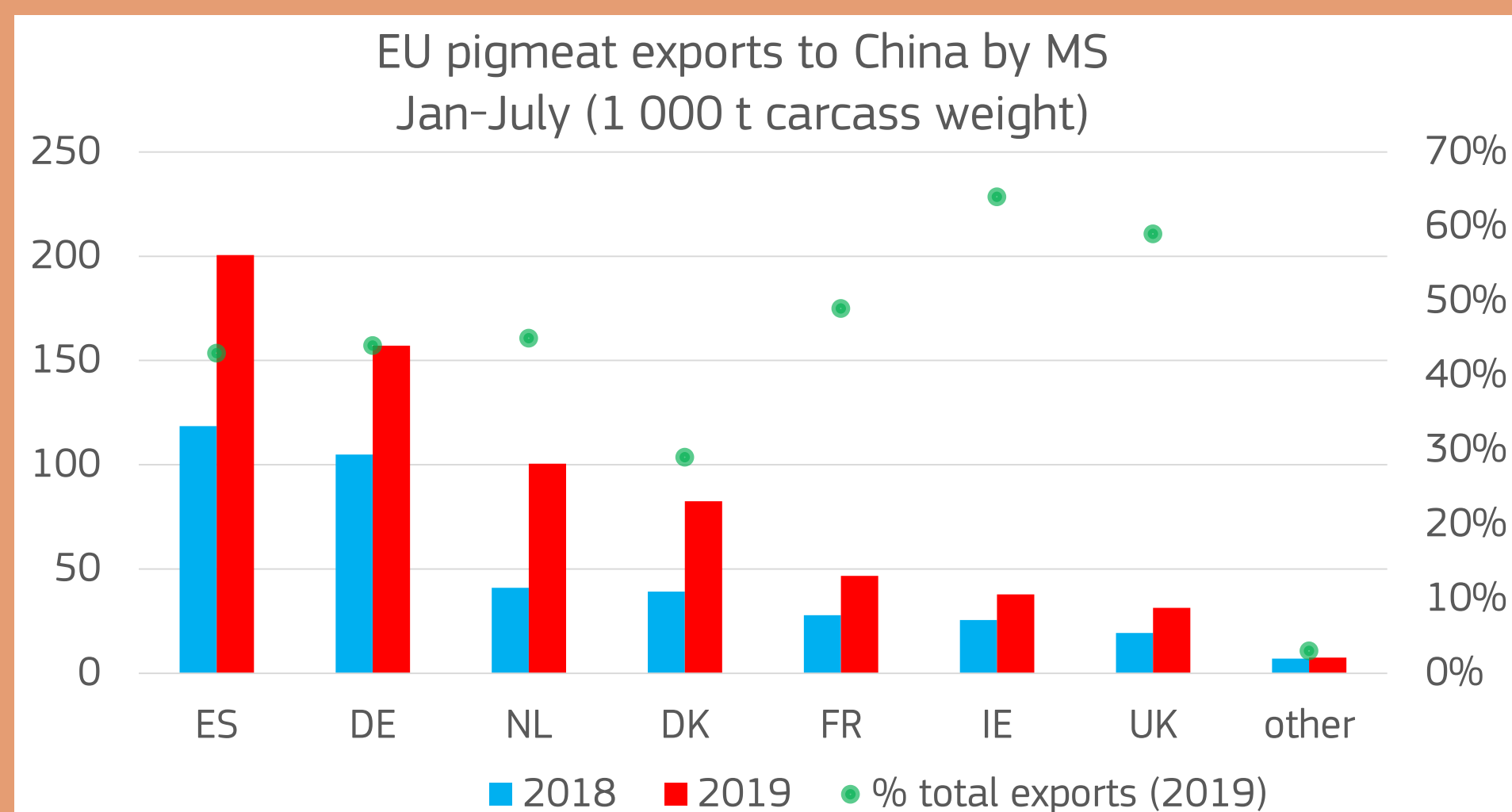


Lower demand and meat availability will result in a **consumption reduction in 2019** (from 11.0 kg to 10.9 kg per capita), after several years of stable or higher consumption supported by higher supply. Despite the lower slaughterings, sluggish demand and worsening of the trade balance keep **EU beef prices below the 3-year average 2016-2018**, except for cows.

Pigmeat



Source: DG Agriculture and Rural Development, based on Global Trade Atlas (export declarations), and Eurostat for EU figures



Source: DG Agriculture and Rural Development, based on Eurostat

ASF drives Chinese pigmeat import demand up



African Swine Fever (ASF) continues to spread in China and other countries in south-eastern Asia. In August it **reached Myanmar**, and in September **the Philippines and South Korea**. South Korea is the 3rd main EU trade partner for pork products (9% share in 2018) while the Philippines is the 4th (7% share). The disease also continues to spread in Vietnam whose imports of EU pork have risen by 36% (2% share) in Jan-July 2019.



Chinese figures report a reduction of the pig herd by one third by July 2019. However, experts estimate it could reach 50%, creating a supply gap that doubles current world trade levels. Live pig prices in China only rose significantly from August, as meat was still available thanks to the slaughterings earlier in the year. Thus, even if **Chinese pigmeat imports have already risen significantly in 2019**, an **additional surge is expected** until the end of 2019 and in 2020. In 2019, China is demanding more pigmeat from all its main trade partners. The US and Canada have surpassed the high 2016 exports levels, despite the trade restrictions in place. By contrast, offal imports remain at similar levels than previous years.

EU pigmeat exports rising but limited by supply



ASF is still contained in the EU. In July **Slovakia became the 10th MS currently affected by the disease**. The other nine MS are: Belgium, Bulgaria, Estonia, Hungary, Italy (Sardinia), Latvia, Lithuania, Poland and Romania. Serbia also declared outbreaks in July.



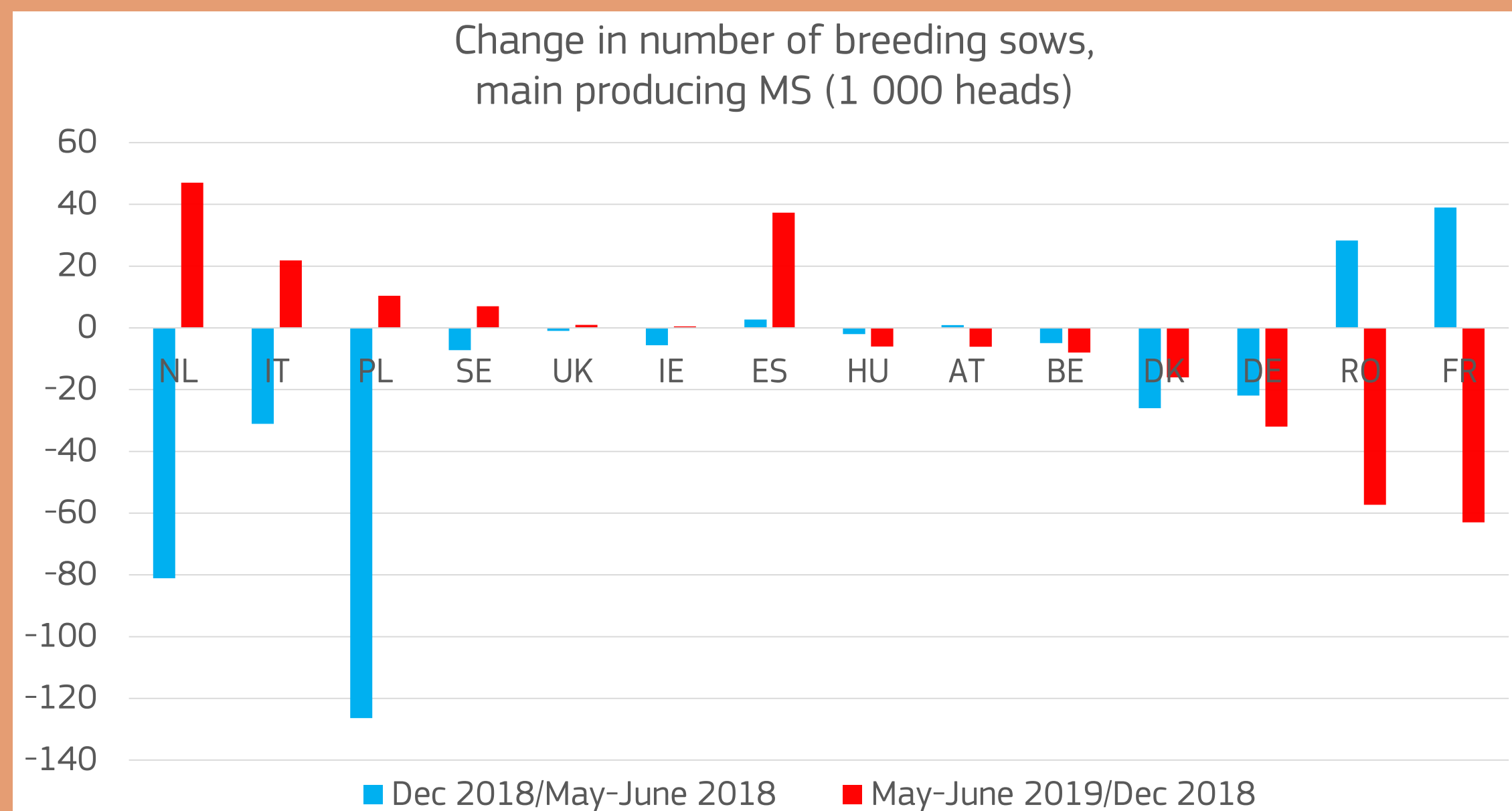
In Jan-July 2019, **EU pork (pigmeat+offal) exports to China have grown by 45% year-on-year** (44% share), driven by rising pigmeat shipments (+73%). Pigmeat exports also increased towards Japan (2nd EU trade partner, +8%), while they fell towards other main trade partners: South Korea (-11%), the Philippines (-5%) and the US (-17%). Total EU pigmeat exports in the period grew by 19% (+9% for offal). By the end of 2019, **EU pigmeat exports are expected to be 20% above last year**, constrained by a limited supply. Export growth should continue in 2020 while supply grows.



Practically all **EU pigmeat exports to China are shipped by seven MS** (see Graph). The share of exports to China for those countries varies between 30% and 65% of their total exports.

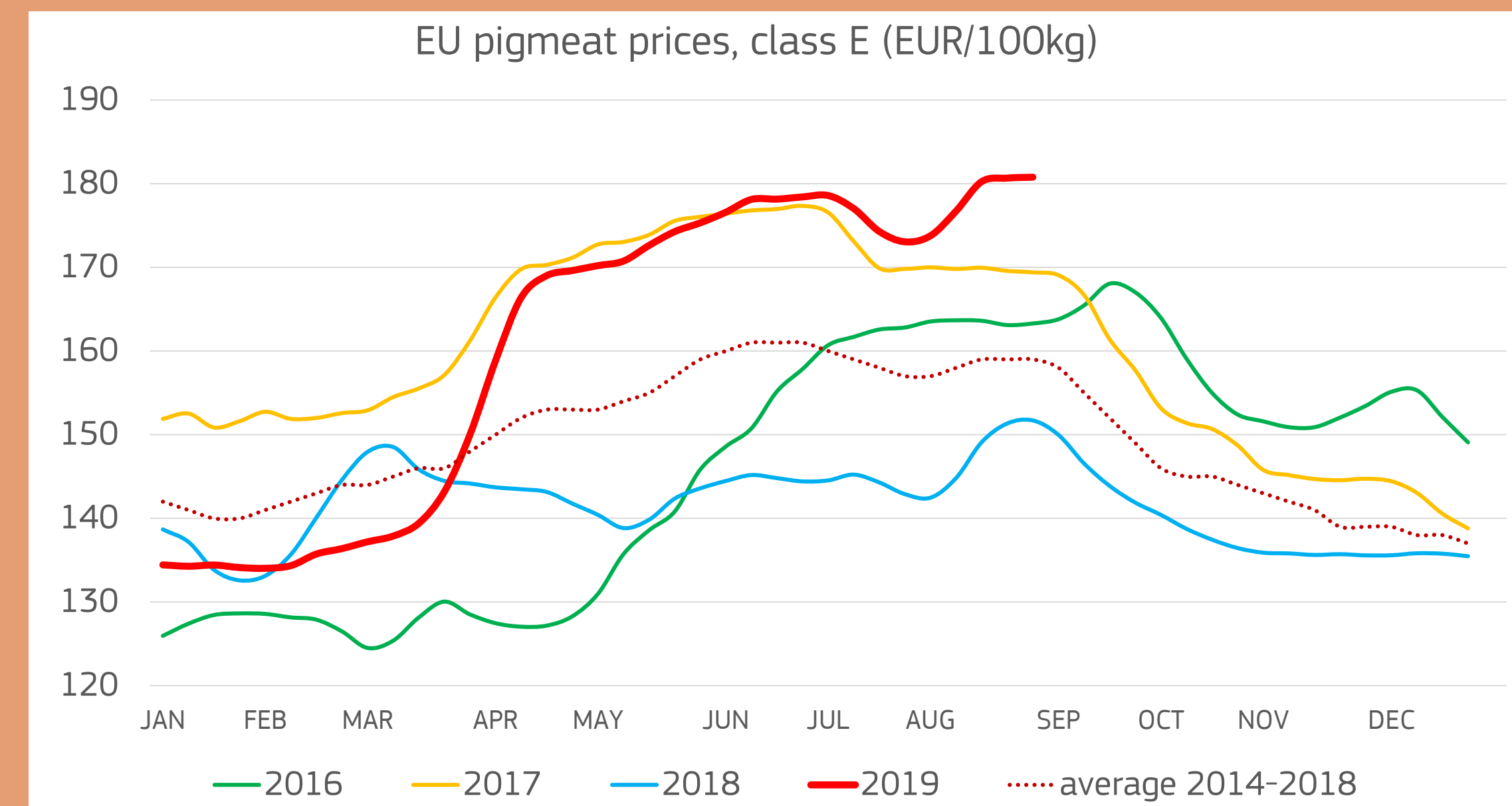
Pigmeat

Production growth in 2020 driven by high prices



Source: DG Agriculture and Rural Development, based on Eurostat

EU pigmeat prices at record levels



Source: DG Agriculture and Rural Development, based on Eurostat



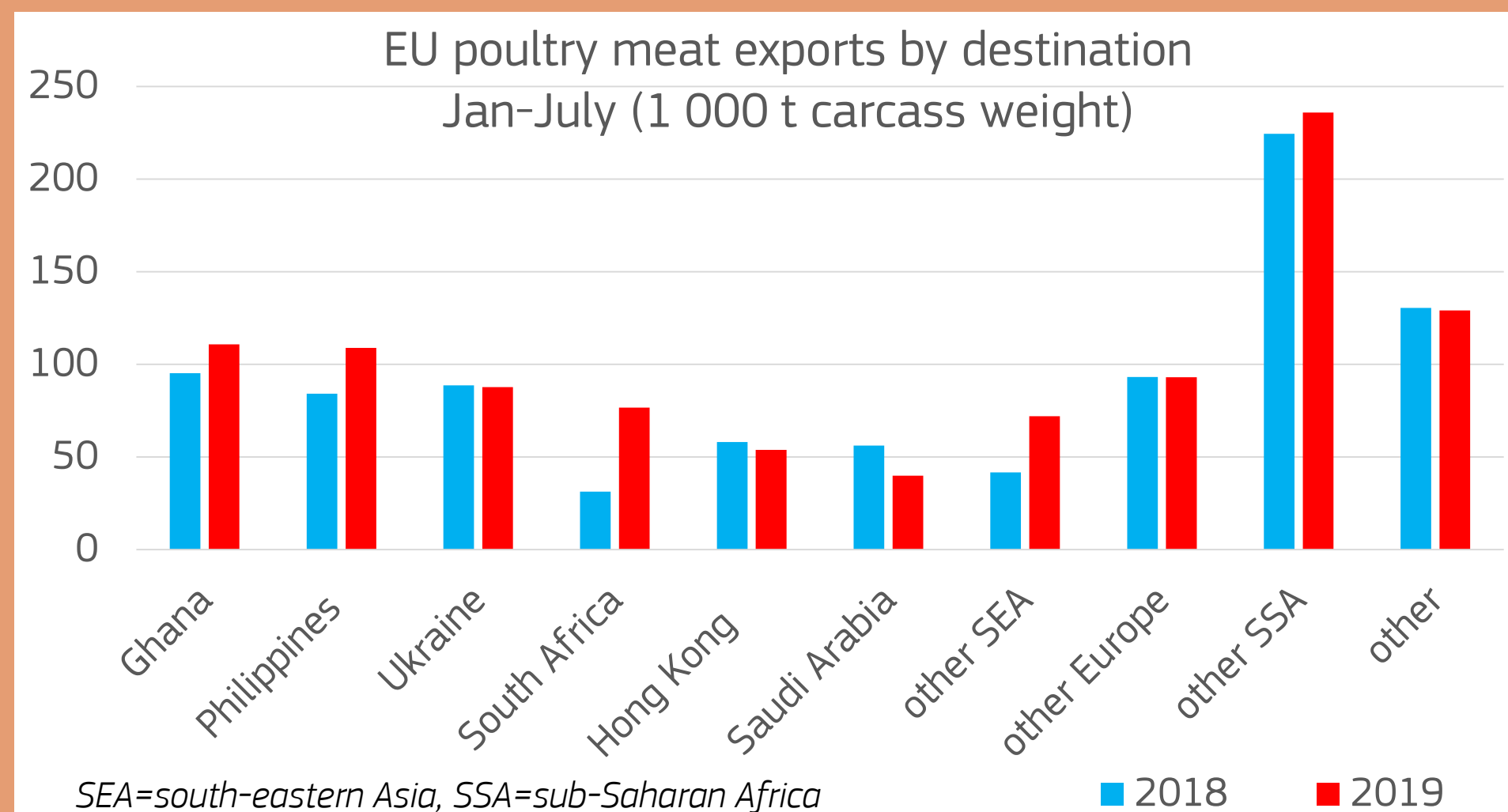
The December 2018 livestock survey showed a significant reduction of the EU breeding herd (-3% year-on-year). The latest survey (May-June 2019) still shows a moderate falling trend in the countries covered (-0.6%). Nevertheless, **pigmeat production should grow slightly in 2019** (+0.4%), thanks to continuing efficiency gains. In 2020, **additional growth is expected** (+1.5%); however, its magnitude will depend on how MS react to the high prices. Some countries will still reduce production due to social concerns, the enforcement of environmental restrictions and ASF risk. Others (e.g. Spain) are already increasing supply to take advantage of the opportunity in Asia.



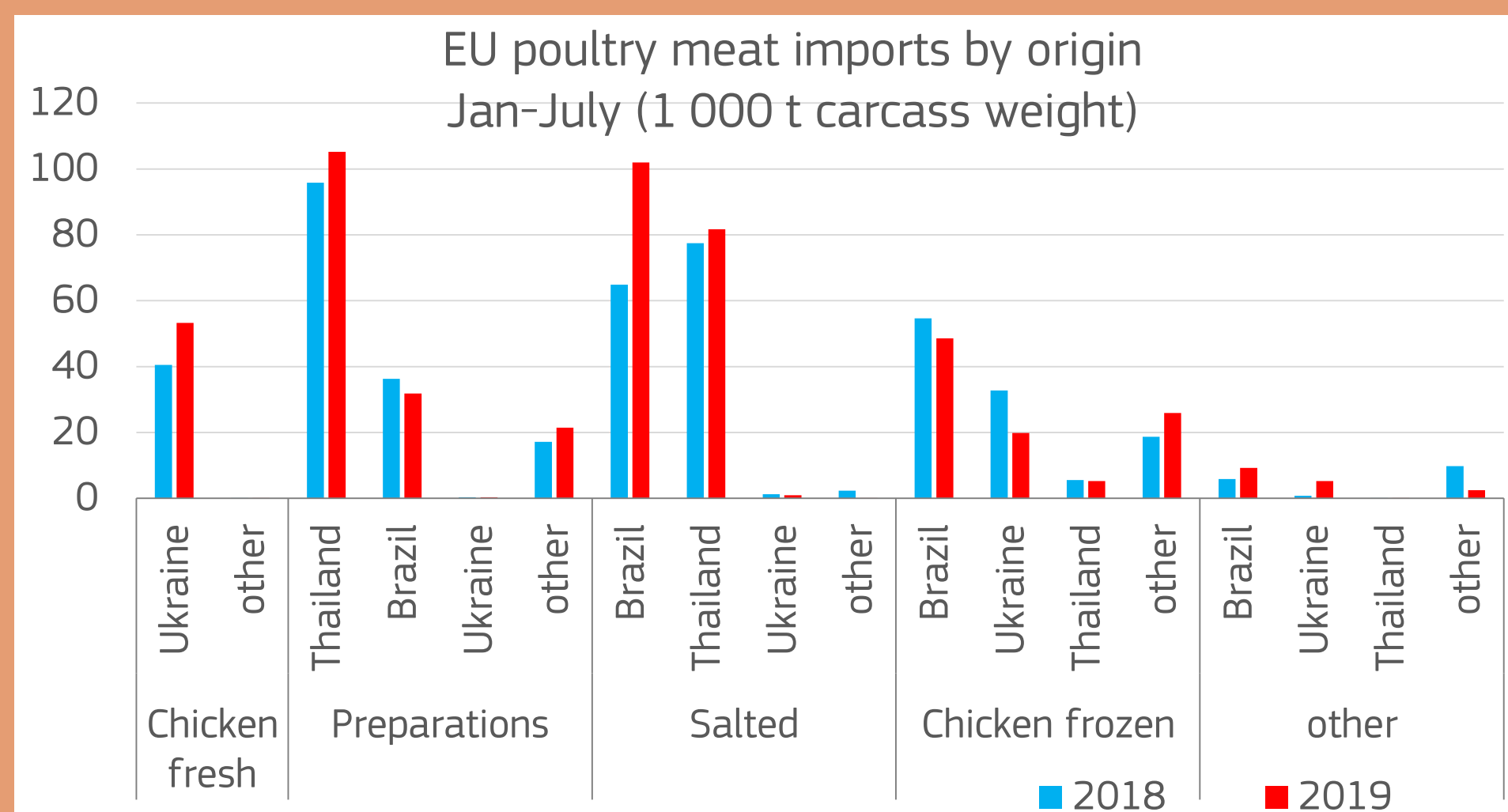
Pigmeat prices are increasing since mid-March and are currently the highest since September 2013, driven by the surge of Chinese exports. Prices should still rise as demand from Asia continues growing. The EU piglet price showed unseasonal increases in August and started to decline only in September.



Apparent consumption per capita is expected to fall to 31.8 kg in 2019 (0.5 kg less than the average of the previous two years) as high prices favour other meats, particularly poultry.



Source: DG Agriculture and Rural Development, based on Eurostat



Source: DG Agriculture and Rural Development, based on Eurostat

EU poultry production rising in 2019



EU poultry meat production continued its increasing trend and rose by 2% year-on-year in the first half of 2019. For the full year, a **2.5% increase in supply is expected** as demand grows to replace pigmeat which prices are rising.



In 2019, broiler prices moved around the 5-year average until August. They could rise by the end of the year if supply fails to follow demand.



Per capita consumption is expected to continue on its rising trend in 2019, up to 25.3 kg (+0.5 kg).

Rising world demand keeps exports strong



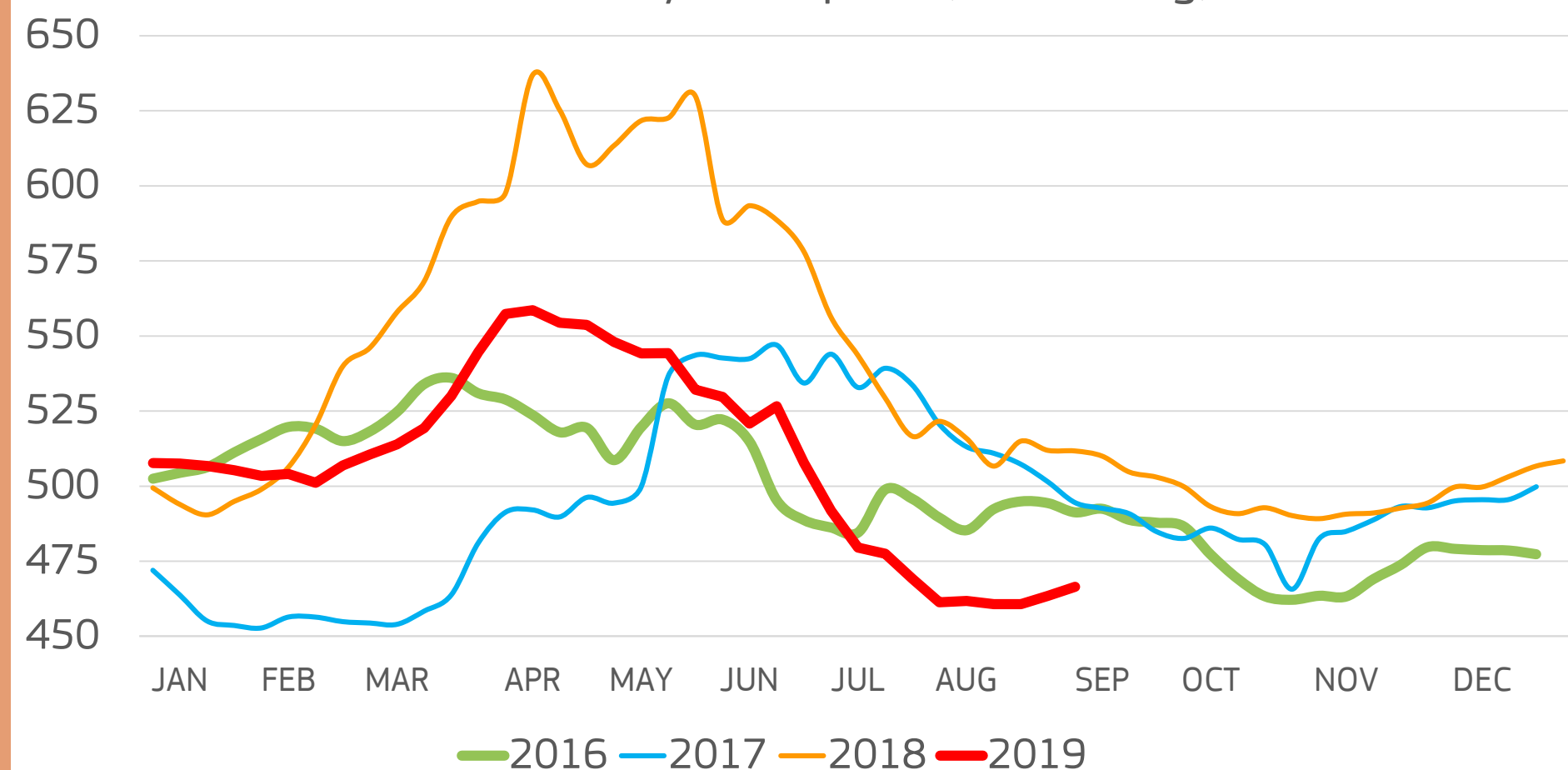
In Jan-July 2019, **EU poultry meat exports grew by 12%** year-on-year, thanks to strong world demand. Shipments increased to most destinations, particularly to South Africa (+145%), but also to south-eastern Asia (the Philippines +30%, Vietnam +49%, China x6) and sub-Saharan countries. Exports to China should continue growing due to its ASF situation. For now, only Poland and France have a direct access to that market through their authorised establishments, and only Poland has been shipping significant volumes. Exports to Saudi Arabia (mostly whole birds from France) continue to fall (-30%) in the face of competition from Brazil. For the full year, **EU poultry exports should grow by around 4.5%**.



Poultry meat **imports also grew strongly in Jan-July 2019** (+10%) driven mostly by rising shipments from Brazil (+18%, share 38%), that is managing to partly recover its exports of salted meat despite the continued de-listing of 20 establishments authorised for poultry exports into the EU. Imports also increased from Thailand (+7%, share of 37%) and China (+39%, mostly chicken preparations, but just a 3% share). Imports from Ukraine are around the same level than last year (15% share), with increases on fresh chicken compensated by reductions on frozen products. **By the end of the year EU imports are expected to grow by 6%**, and should continue growing in 2020 particularly if the de-listed Brazilian export establishments are re-authorised to export.

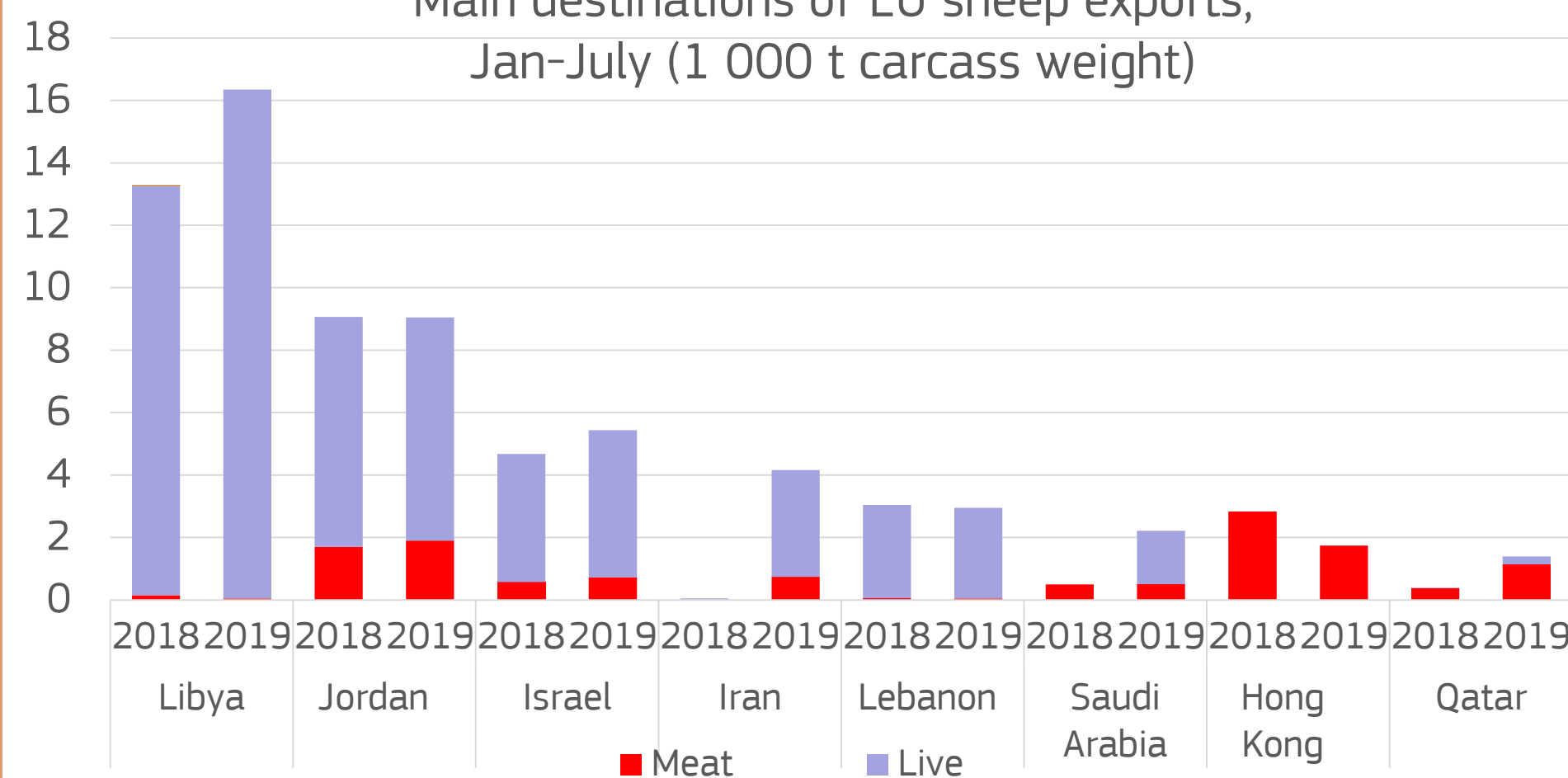
Sheep and goat

EU heavy lamb price (EUR/100kg)



Source: DG Agriculture and Rural Development, based on Eurostat

Main destinations of EU sheep exports, Jan-July (1 000 t carcass weight)



Source: DG Agriculture and Rural Development, based on Eurostat

Increase in EU sheep and goat production



EU sheep and goat meat production is expected to **increase by 1% in 2019** to 0.9 million t, followed by a decline of 1% in 2020. Favourable forage conditions compared to last year and a higher number of ewes put to the ram push production upwards, despite a significant reduction of the total herd size in 2018 (-1.6 million heads or -1.6%). The UK reported the highest increase of slaughterings (+10%) in the first half-year in anticipation of possible trade difficulties due to Brexit. More female lambs are put forward for slaughtering as the renewal of the ewes is postponed. On the other hand, Spain recorded a huge increase in exports of live animals, with a negative impact on its domestic meat production.



Despite a lower supply, **prices of heavy lamb** continued to follow the classical seasonal pattern but at a level **10 to 15% below the high prices of 2018**, reaching a **4-year low in July-Sept**, due to a weak pound sterling and an oversupply in the UK.

Exports at record level



EU sheep meat imports **declined by 19%** in the first half of 2019, and are expected to reach **-16%** by the end of the year. Surging demand in China and a less favourable exchange rate for the New Zealand and Australian dollar make it more profitable to divert part of the trade from Oceania to China.



After a slow start of the year, in Jan-July EU sheep meat exports are 11% higher than the same period last year. The decline in exports to Hong Kong (-40%) is compensated by exports to other destinations. Overall, **meat exports** are expected to **grow by 11% in 2019**.



EU live sheep exports are expected to **increase by 20%** following additional demand in Libya and Israel, as well as in new destinations such as Iran, Qatar and Saudi Arabia.



EU consumption could **drop in 2019 by 2.5%**, because of lower supply on the EU market (higher production does not compensate for lower imports and higher exports).

ARABLE CROPS

Table 1.1 EU-28 cereal, oilseed and protein crop area (1000 ha)

	2015	2016	EU-28		2019f	% variation			
			2017	2018		18/17	18/19 vs 5-yr. av.*	19/18	19/20 vs 5-yr. av.*
Common wheat	24 325	24 250	23 386	23 064	23 923	-1.4	-3.9	3.7	-0.3
Durum	2 436	2 773	2 545	2 475	2 325	-2.8	0.7	-6.0	-6.4
Rye	1 964	1 923	1 960	1 942	2 210	-0.9	-4.3	13.8	13.0
Barley	12 219	12 302	12 040	12 281	12 246	2.0	-0.2	-0.3	-0.2
Oats	2 526	2 611	2 684	2 727	2 654	1.6	4.6	-2.7	1.5
Maize	9 256	8 563	8 272	8 306	8 824	0.4	-9.2	6.2	1.3
Triticale	3 117	2 913	2 759	2 630	2 740	-4.7	-8.5	4.2	-4.7
Sorghum	139	123	135	153	188	13.2	9.5	23.0	32.3
Others	1 297	1 320	1 415	1 536	1 379	8.5	13.0	-10.2	1.5
Cereals	57 279	56 778	55 195	55 115	56 490	-0.1	-3.7	2.5	0.1
Rapeseed	6 467	6 535	6 749	6 928	5 612	2.7	4.1	-19.0	-15.8
Sunflower	4 197	4 138	4 312	4 124	4 351	-4.3	-3.1	5.5	3.6
Soya beans	893	832	962	955	996	-0.7	24.9	4.2	11.4
Linseed	66	84	80	71	78	-11.5	1.3	9.6	7.6
Oilseeds	11 623	11 588	12 103	12 078	11 036	-0.2	3.3	-8.6	-6.2
Field peas	744	913	1 032	871	811	-15.6	19.3	-6.9	-3.8
Broad beans	624	655	689	627	573	-9.0	12.4	-8.6	-9.8
Lupins	258	180	165	147	161	-11.3	-5.3	9.6	-2.0
Protein crops	1 626	1 748	1 886	1 645	1 545	-12.8	11.6	-6.1	-7.7
Sugar beet	1 420	1 499	1 756	1 735	1 654	-1.2	10.5	-4.7	2.0
Total	71 948	71 613	70 940	70 573	70 725	-0.5	-1.8	0.2	-1.1

* The 5-year average is a olympic average in all tables.

Table 1.2 EU-28 cereal, oilseed and protein crop yields (t/ha)

	2015	2016	EU-28		2019f	% variation			
			2017	2018		18/17	18/19 vs 5-yr. av.*	19/18	19/20 vs 5-yr. av.*
Common wheat	6.3	5.6	6.1	5.6	6.1	-8.0	-6.5	8.5	2.5
Durum	3.4	3.5	3.5	3.5	3.4	2.2	3.4	-3.9	-1.9
Rye	4.0	3.9	3.8	3.2	3.8	-14.0	-17.6	18.0	-1.3
Barley	5.1	4.9	4.9	4.6	5.1	-5.8	-6.1	9.9	3.6
Oats	3.0	3.1	3.1	2.8	3.0	-7.7	-8.3	4.7	-2.8
Maize	6.4	7.4	7.9	8.3	7.6	6.0	13.2	-9.3	-2.8
Triticale	4.1	4.1	4.2	3.8	4.0	-10.7	-9.5	6.5	-2.6
Sorghum	5.2	5.4	5.3	5.5	5.2	4.1	4.0	-5.6	-3.9
Others	2.7	2.7	2.9	2.4	3.0	-16.9	-13.3	22.2	7.6
Cereals	5.5	5.3	5.6	5.3	5.6	-4.8	-2.8	5.0	2.1
Rapeseed	3.4	3.1	3.3	2.9	3.0	-11.3	-11.1	4.2	-6.8
Sunflower	1.9	2.1	2.4	2.4	2.3	0.1	15.2	-5.4	2.4
Soya beans	2.7	3.0	2.8	3.0	2.9	6.6	5.5	-3.0	-1.2
Linseed	1.9	1.8	1.9	1.5	2.0	-22.0	-24.4	35.0	8.3
Oilseeds	2.8	2.7	2.9	2.7	2.7	-6.4	-2.6	-0.7	-3.4
Field peas	2.8	2.5	2.7	2.3	2.6	-14.5	-14.8	14.5	0.4
Broad beans	3.1	2.9	3.1	2.3	2.8	-27.4	-26.0	24.2	-8.1
Lupins	1.4	1.7	1.6	1.4	1.5	-10.7	-11.8	5.0	-4.0
Protein crops	2.7	2.6	2.7	2.2	2.6	-19.7	-18.5	16.9	-3.7
Sugar beet	71.7	75.0	81.5	69.0	72.2	-15.4	-8.8	4.6	-4.6

Source: DG Agriculture and Rural Development, based on Eurostat

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Table 1.3 EU-28 cereal, oilseed and protein crop gross production (1000 t)

	2015/16	2016/17	EU-28			% variation			
			2017/18	2018/19	2019/20f	18/19 vs 17/18	18/19 vs 5-yr. av.*	19/20 vs 18/19	19/20 vs 5-yr. av.*
Common wheat	152 516	134 963	143 143	129 848	146 143	-9.3	-9.2	12.5	2.5
Durum	8 389	9 674	8 810	8 756	7 903	-0.6	4.1	-9.7	-8.7
Rye	7 796	7 406	7 360	6 270	8 419	-14.8	-22.4	34.3	11.9
Barley	61 931	59 974	58 811	56 493	61 922	-3.9	-6.8	9.6	3.5
Oats	7 585	8 138	8 197	7 691	7 836	-6.2	-4.3	1.9	-0.4
Maize	59 287	63 085	65 071	69 271	66 741	6.5	6.5	-3.7	1.4
Triticale	12 785	11 829	11 691	9 948	11 031	-14.9	-17.8	10.9	-8.8
Sorghum	720	669	719	847	983	17.9	17.2	16.1	29.1
Others	3 453	3 584	4 158	3 749	4 114	-9.8	-3.4	9.7	8.9
Cereals	314 461	299 322	307 959	292 874	315 091	-4.9	-5.5	7.6	2.6
Rapeseed	21 814	20 102	22 020	20 043	16 926	-9.0	-7.2	-15.6	-20.6
Sunflower	7 882	8 739	10 403	9 964	9 948	-4.2	9.6	-0.2	6.7
Soya beans	2 371	2 480	2 672	2 827	2 858	5.8	26.8	1.1	14.0
Linseed	128	147	154	107	158	-31.0	-21.8	48.0	21.6
Oilseeds	32 195	31 467	35 249	32 940	29 890	-6.6	-0.2	-9.3	-10.7
Field peas	2 077	2 315	2 766	1 996	2 127	-27.9	3.5	6.6	-0.1
Broad beans	1 962	1 922	2 154	1 423	1 616	-33.9	-16.8	13.6	-8.6
Lupins	364	297	263	208	240	-20.9	-18.8	15.1	-6.6
Protein crops	4 402	4 534	5 183	3 627	3 983	-30.0	-7.7	9.8	-4.9
Sugar beet	101 872	112 405	143 121	119 690	119 357	-16.4	1.9	-0.3	-1.4

Table 1.4 EU-28 overall cereal balance sheet (million t)

	2015/16	2016/17	EU-28			% variation			
			2017/18	2018/19	2019/20f	18/19 vs 17/18	18/19 vs 5-yr. av.*	19/20 vs 18/19	19/20 vs 5-yr. av.*
Beginning stocks	46.4	43.8	37.4	47.6	46.9	27.3	21.1	-1.4	10.4
Gross production	314.5	299.3	308.0	292.9	315.1	-4.9	-5.5	7.6	2.6
Usable production	311.7	296.7	305.3	290.4	312.3	-4.9	-5.5	7.6	2.6
Imports	20.8	19.3	24.5	31.0	23.4	26.3	56.8	-24.6	8.4
Availabilities	378.9	359.8	367.2	368.9	382.6	0.5	0.1	3.7	2.9
Total domestic uses	282.1	282.0	283.7	285.6	287.8	0.7	1.5	0.7	1.8
- Human	65.2	65.4	65.6	65.7	65.9	0.1	0.7	0.4	0.7
- Seed	9.5	9.5	9.3	9.3	9.7	-0.5	-2.2	4.4	2.8
- Industrial	34.0	34.2	34.8	34.8	35.4	0.1	2.7	1.8	3.2
o.w. bioethanol	12.0	12.2	12.6	12.6	13.3	0.4	6.2	5.1	8.5
- Animal feed	173.4	172.9	174.1	175.9	176.8	1.0	1.8	0.5	1.9
Losses (excl on-farm)	2.2	2.2	2.2	2.2	2.2	0.0	0.0	0.0	0.0
Exports	50.8	38.2	33.6	34.2	38.7	1.6	-22.7	13.3	-5.8
Total uses	335.1	322.4	319.6	322.0	328.7	0.8	-1.0	2.1	0.8
End stocks	43.8	37.4	47.6	46.9	54.0	-1.4	10.4	14.9	18.0
- Market	43.8	37.4	47.6	46.9	54.0	-1.4	10.4	14.9	18.0
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate %	110.5	105.2	107.6	101.7	108.5	0.0	0.0	0.0	0.0

Source: DG Agriculture and Rural Development, based on Eurostat

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Table 1.5 EU-28 cereal balance sheet 2019/2020 (forecast) (million t)

	Common Wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL
Beginning stocks (01.07.2019)	12.2	5.2	2.3	24.9	0.2	0.7	0.2	1.2	0.0	46.9
Gross production	146.1	61.9	7.9	66.7	8.4	1.0	7.8	11.0	4.1	315.1
Usable production	145.0	61.4	7.8	66.5	8.2	0.9	7.7	10.8	3.9	312.3
Import	3.4	0.5	2.0	17.0	0.1	0.3	0.0	0.0	0.2	23.4
Total availabilities	160.6	67.1	12.1	108.4	8.5	1.8	7.9	12.0	4.1	382.6
Total domestic use	117.2	49.9	9.4	82.8	6.8	0.7	7.4	9.8	3.6	287.8
- Human	48.1	0.4	8.1	4.9	3.1	0.2	1.2	0.1	0.0	65.9
- Seed	4.9	2.2	0.4	0.4	0.5	0.0	0.4	0.5	0.3	9.7
- Industrial	11.6	9.2	0.1	12.5	1.3	0.0	0.1	0.4	0.2	35.4
o.w. bioethanol	5.0	0.4	0.0	6.8	0.7	0.0	0.0	0.3	0.0	13.3
- Animal feed	52.6	38.2	0.8	65.0	2.0	0.6	5.7	8.8	3.1	176.8
Losses (excl on-farm)	0.9	0.4	0.0	0.6	0.1	0.0	0.1	0.1	0.0	2.2
Export	25.5	8.8	0.9	3.1	0.2	0.0	0.2	0.0	0.0	38.7
Total use	143.7	59.1	10.3	86.5	7.1	0.7	7.7	9.9	3.7	328.7
End stocks (30.06.2019)	16.9	8.0	1.8	21.9	1.5	1.1	0.3	2.1	0.5	54.0
- Market	16.9	8.0	1.8	21.9	1.5	1.1	0.3	2.1	0.5	54.0
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Change in stocks	4.7	2.8	-0.5	-3.0	1.3	0.4	0.1	0.9	0.4	7.0
Change in public stocks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate %	123.7	123.1	83.2	80.2	120.5	125.3	104.7	109.9	108.8	108.5

Table 1.6 EU-28 cereal balance sheet 2018/2019 (million t)

	Common Wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL
Beginning stocks (01.07.2018)	17.6	4.0	2.7	19.9	0.4	0.4	0.4	1.4	1.0	47.6
Gross production	129.8	56.5	8.8	69.3	6.3	0.8	7.7	9.9	3.7	292.9
Usable production	128.8	56.0	8.7	69.0	6.1	0.8	7.6	9.7	3.6	290.4
Import	4.1	0.1	1.3	24.2	0.3	0.8	0.0	0.0	0.1	31.0
Total availabilities	150.5	60.2	12.7	113.1	6.8	1.9	8.0	11.1	4.7	368.9
Total domestic use	116.0	46.6	9.4	84.1	6.3	1.3	7.7	9.8	4.6	285.6
- Human	48.0	0.4	8.0	4.9	3.0	0.2	1.1	0.1	0.0	65.7
- Seed	4.8	2.1	0.5	0.4	0.4	0.0	0.4	0.5	0.1	9.3
- Industrial	11.2	9.1	0.1	12.4	1.3	0.0	0.1	0.4	0.2	34.8
o.w. bioethanol	4.7	0.4	0.0	6.5	0.7	0.0	0.0	0.3	0.0	12.7
- Animal feed	52.0	35.0	0.8	66.4	1.6	1.1	6.0	8.8	4.3	175.9
Losses (excl on-farm)	0.9	0.4	0.0	0.6	0.1	0.0	0.1	0.1	0.0	2.2
Export	21.4	8.0	0.9	3.5	0.2	0.0	0.1	0.0	0.0	34.2
Total use	138.3	55.0	10.4	88.2	6.6	1.3	7.8	9.9	4.6	322.0
End stocks (30.06.2018)	12.2	5.2	2.3	24.9	0.2	0.7	0.2	1.2	0.0	46.9
- Market	12.2	5.2	2.3	24.9	0.2	0.7	0.2	1.2	0.0	46.9
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Change in stocks	-5.4	1.2	-0.4	5.0	-0.1	0.3	-0.2	-0.1	-0.9	-0.6
Change in public stocks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate %	111.1	120.3	92.0	82.0	97.3	63.2	99.4	99.5	78.1	101.7

Source: DG Agriculture and Rural Development, based on Eurostat

Statistical Annex

Table 1.7 EU-28 cereal balance sheet 2017/2018 (million t)

	Common Wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL
Beginning stocks (01.07.2017)	9.6	5.5	3.0	14.4	0.5	0.1	0.4	1.9	1.6	37.0
Gross production	143.1	58.8	8.8	65.1	7.4	0.7	8.2	11.7	4.2	308.0
Usable production	142.0	58.3	8.7	64.8	7.2	0.7	8.1	11.5	4.0	305.3
Import	4.0	0.5	1.5	17.9	0.1	0.4	0.0	0.0	0.2	24.5
Total availabilities	155.9	64.3	13.2	97.1	7.7	1.2	8.5	13.4	5.7	366.8
Total domestic use	116.1	50.9	9.4	74.8	7.2	0.9	7.9	11.9	4.7	283.7
- Human	47.9	0.4	8.0	4.9	3.1	0.2	1.1	0.1	0.0	65.6
- Seed	4.8	2.1	0.5	0.4	0.4	0.0	0.4	0.5	0.1	9.3
- Industrial	11.2	9.1	0.1	12.1	1.7	0.0	0.1	0.4	0.1	34.8
<i>o.w. bioethanol</i>	4.7	0.4	0.0	6.2	1.0	0.0	0.0	0.3	0.0	12.6
- Animal feed	52.2	39.3	0.8	57.4	2.1	0.7	6.2	10.9	4.5	174.1
Losses (excl on-farm)	0.9	0.4	0.0	0.6	0.1	0.0	0.1	0.1	0.0	2.2
Export	21.4	9.0	1.1	1.8	0.1	0.0	0.2	0.0	0.0	33.6
Total use	138.4	60.2	10.6	77.2	7.4	0.9	8.2	12.0	4.8	319.6
End stocks (30.06.2017)	17.6	4.0	2.7	19.9	0.4	0.4	0.4	1.4	1.0	47.6
- Market	17.6	4.0	2.7	19.9	0.4	0.4	0.4	1.4	1.0	47.6
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Change in stocks	8.0	-1.4	-0.3	5.5	-0.1	0.2	-0.1	-0.6	-0.6	10.6
Change in public stocks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate %	122.4	114.6	92.7	86.7	99.7	78.1	102.6	96.0	83.9	107.6

Table 1.8 EU-28 oilseeds balance sheets (million t)

	2015/16	2016/17	EU-28			% variation			
			2017/18	2018/19	2019/20f	18/19 vs 17/18	18/19 vs 5-yr. av.*	19/20 vs 18/19	19/20 vs 5-yr. av.*
Production	32.1	31.3	35.1	32.8	29.7	-6.4	-0.1	-9.4	-10.8
Rapeseed	21.8	20.1	22.0	20.0	16.9	-9.0	-7.2	-15.6	-20.6
Soya beans	2.4	2.5	2.7	2.8	2.9	5.8	26.8	1.1	14.0
Sunflower	7.9	8.7	10.4	10.0	9.9	-4.2	9.6	-0.2	6.7
Total domestic use	49.8	48.6	51.1	52.9	51.7	3.5	7.4	-2.2	3.3
Rapeseed	24.6	23.7	24.9	25.0	22.8	0.2	1.5	-8.4	-8.0
<i>of which crushing</i>	23.8	22.9	24.0	24.1	22.0	0.2	1.3	-8.5	-8.1
Soya beans	17.1	16.1	15.9	17.9	18.8	12.7	15.1	5.2	15.3
<i>of which crushing</i>	15.2	14.2	14.0	15.8	16.5	13.4	14.8	4.4	14.3
Sunflower	8.1	8.9	10.3	10.0	10.0	-2.6	12.7	0.2	8.1
<i>of which crushing</i>	7.0	7.8	9.1	8.9	9.0	-2.7	13.5	0.6	9.2
Imports	18.5	19.0	18.7	19.8	21.1	6.1	9.0	6.5	12.8
Rapeseed	3.2	4.1	4.0	4.2	5.5	5.6	18.1	30.0	45.8
Soya beans	14.8	14.1	14.1	15.1	15.1	6.7	8.2	0.2	5.3
Sunflower	0.5	0.8	0.6	0.5	0.5	-5.7	14.9	-1.6	0.0
Exports	0.9	0.9	1.0	0.8	0.8	-25.5	-24.1	-0.3	-18.6
Rapeseed	0.3	0.3	0.1	0.1	0.1	-31.9	-71.7	11.9	-62.0
Soya beans	0.1	0.2	0.3	0.2	0.2	-46.3	2.8	6.1	0.0
Sunflower	0.4	0.4	0.6	0.5	0.5	-14.2	-1.2	-4.3	0.0
End stocks	3.1	3.8	5.5	4.6	2.9	-17.6	35.9	-35.7	-24.0
Rapeseed	1.1	1.3	2.3	1.5	1.0	-33.5	32.1	-34.2	-23.5
Soya beans	1.4	1.7	2.3	2.1	1.1	-6.8	45.2	-48.6	-36.7
Sunflower	0.6	0.9	0.9	0.9	0.8	-4.9	17.7	-7.4	0.5
Self-sufficiency rate %	64.4	64.4	68.7	62.1	57.5				

Source: DG Agriculture and Rural Development, based on Eurostat

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Table 1.9 EU-28 oilmeals balance sheets (million t)

	2015/16	2016/17	EU-28		2019/20f	% variation			
			2017/18	2018/19		18/19 vs 17/18	18/19 vs 5-yr. av.*	19/20 vs 18/19	19/20 vs 5-yr. av.*
Production	29.4	28.5	29.7	31.1	30.5	4.6	7.6	-1.9	4.1
Rapeseed	13.6	13.0	13.7	13.7	12.5	0.2	1.3	-8.5	-8.1
Soya beans	12.0	11.2	11.0	12.5	13.1	13.4	14.8	4.4	14.3
Sunflower	3.8	4.3	5.0	4.9	4.9	-2.7	13.5	0.6	9.2
Total domestic use	52.2	49.6	51.3	52.0	52.0	1.5	3.4	0.0	1.9
Rapeseed	13.5	12.7	13.5	13.8	12.5	2.3	2.3	-9.2	-7.9
Soya beans	31.9	29.2	29.5	30.2	31.4	2.6	3.8	4.1	6.1
Sunflower	6.8	7.7	8.3	8.0	8.1	-3.8	8.1	0.8	5.4
Imports	23.8	22.1	22.8	22.0	22.5	-3.3	-1.7	2.3	0.6
Rapeseed	0.4	0.2	0.2	0.5	0.4	114.9	41.6	-29.4	0.0
Soya beans	20.2	18.2	18.8	18.0	18.7	-4.2	-3.2	3.8	0.8
Sunflower	3.2	3.7	3.7	3.5	3.5	-6.3	2.9	-0.5	0.0
Exports	1.0	1.1	1.2	1.1	1.0	-9.9	8.9	-9.1	-4.4
Rapeseed	0.5	0.5	0.5	0.4	0.4	-2.8	-0.2	-10.5	-12.8
Soya beans	0.3	0.3	0.4	0.3	0.3	-15.1	-0.6	-0.5	0.0
Sunflower	0.2	0.3	0.4	0.4	0.3	-13.2	37.3	-15.1	0.0
End stocks	0.5	0.5	0.5	0.5	0.5	-0.4	0.0	-0.5	-1.1
Rapeseed	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0
Soya beans	0.4	0.3	0.3	0.3	0.3	-0.5	0.0	-0.7	-1.6
Sunflower	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0
Self-sufficiency rate %	100.5	102.3	101.6	99.5	100.3				

Table 1.10 EU-28 vegetable oils balance sheets (million t)

	2015/16	2016/17	EU-28		2019/20f	% variation			
			2017/18	2018/19		18/19 vs 17/18	18/19 vs 5-yr. av.*	19/20 vs 18/19	19/20 vs 5-yr. av.*
Production	15.7	15.5	16.5	16.8	16.1	1.7	6.1	-4.0	-0.2
Rapeseed	9.8	9.4	9.8	9.9	9.0	0.2	1.3	-8.5	-8.1
Soya beans	3.0	2.8	2.8	3.2	3.3	13.4	14.8	4.4	14.3
Sunflower	2.9	3.3	3.8	3.7	3.8	-2.7	13.5	0.6	9.2
Palm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total domestic use	23.1	22.5	24.0	24.8	23.4	3.4	9.0	-5.5	0.7
Rapeseed	9.6	9.2	9.7	9.9	8.9	1.6	3.3	-10.1	-8.8
Soya beans	2.4	2.2	2.2	2.7	2.7	22.8	23.2	0.2	18.5
Sunflower	3.9	4.4	5.1	5.0	4.9	-1.1	21.7	-2.6	9.0
Palm	7.1	6.6	7.0	7.2	7.0	2.9	5.9	-3.4	0.4
Imports	9.1	8.9	9.2	9.8	9.2	6.2	11.3	-6.5	1.1
Rapeseed	0.2	0.2	0.2	0.2	0.2	56.0	17.9	-17.2	0.0
Soya beans	0.3	0.3	0.3	0.4	0.3	56.7	34.1	-25.4	0.0
Sunflower	1.4	1.7	1.7	1.8	1.6	8.3	35.3	-13.4	0.0
Palm	7.2	6.7	7.1	7.3	7.1	2.8	5.0	-3.4	0.0
Exports	1.8	1.8	1.7	1.8	1.8	2.8	-1.1	2.2	0.2
Rapeseed	0.4	0.3	0.3	0.2	0.3	-22.4	-36.9	52.2	0.0
Soya beans	1.0	0.9	0.8	0.9	0.9	1.9	-3.0	3.7	0.0
Sunflower	0.4	0.5	0.5	0.6	0.5	16.8	31.0	-18.1	0.0
Palm	0.1	0.1	0.1	0.1	0.1	10.1	1.8	-1.7	0.0
End stocks	1.5	1.5	1.5	1.5	1.5	-0.5	-1.1	0.4	0.0
Rapeseed	0.6	0.6	0.6	0.6	0.6	-0.5	-1.4	0.8	0.0
Soya beans	0.2	0.2	0.2	0.2	0.2	0.0	0.0	0.0	0.0
Sunflower	0.3	0.3	0.3	0.3	0.3	-0.7	-3.0	2.2	1.0
Palm	0.5	0.5	0.5	0.5	0.5	-0.6	0.0	-0.8	-1.7
Self-sufficiency rate %	68.2	68.9	68.7	67.6	68.7				

Source: DG Agriculture and Rural Development, based on Eurostat

Table 1.11 EU-28 protein crops balance sheets (1000 t)

	2015/16	2016/17	EU-28			% variation			
			2017/18	2018/19	2019/20f	18/19 vs 17/18	18/19 vs 5-yr. av.*	19/20 vs 18/19	19/20 vs 5-yr. av.*
Production	5 165	5 459	6 123	4 781	5 107	-21.9	-6.9	6.8	-0.5
Field peas	2 077	2 315	2 766	1 996	2 127	-27.9	-6.3	6.6	-0.1
Broad beans	1 962	1 922	2 154	1 423	1 616	-33.9	-19.6	13.6	-8.6
Lentils	56	70	66	76	79	14.2	17.5	4.1	22.3
Lupins	364	297	263	208	240	-20.9	-18.8	15.1	-6.6
Chickpeas	61	78	132	191	189	45.0	111.7	-1.1	109.4
Other dry pulses	646	776	743	887	856	19.5	23.0	-3.5	18.7
Total domestic use	5 058	5 337	6 447	5 926	6 236	-8.1	8.9	5.2	14.6
Field peas	1 630	1 716	2 517	2 489	2 577	-1.1	28.0	3.5	32.5
Broad beans	1 487	1 547	1 756	1 031	1 227	-41.3	-23.9	19.0	-9.4
Lentils	253	299	294	289	290	-1.7	3.7	0.6	4.3
Lupins	453	445	465	426	449	-8.4	-3.5	5.5	1.9
Chickpeas	199	214	271	362	368	33.6	58.6	1.7	61.4
Other dry pulses	1 036	1 115	1 145	1 330	1 324	16.1	21.0	-0.4	20.5
Imports	987	1 099	1 504	1 767	1 731	17.5	45.5	-2.1	42.5
Field peas	56	132	427	668	650	56.2	176.5	-2.6	169.2
Broad beans	9	10	9	8	9	-13.1	-13.0	7.5	-6.5
Lentils	200	234	231	217	216	-6.3	0.3	-0.3	0.0
Lupins	89	148	202	218	210	7.9	48.8	-3.6	43.3
Chickpeas	146	147	167	190	179	13.9	24.1	-6.1	16.6
Other dry pulses	486	427	467	467	468	-0.1	-0.2	0.2	0.0
Exports	1 094	1 221	1 180	622	698	-47.3	-35.6	12.2	-27.7
Field peas	503	731	677	174	200	-74.3	-61.5	15.1	-55.6
Broad beans	484	386	407	400	398	-1.7	0.6	-0.6	0.0
Lentils	4	5	4	4	4	0.0	-15.6	18.5	0.0
Lupins	0	0	0	0	0	101.2	-22.9	298	0.0
Chickpeas	7	11	28	20	13	-29.6	54.5	-35.3	0.0
Other dry pulses	96	87	64	24	82	-62.1	-70.5	239.0	0.0

Source: DG Agriculture and Rural Development, based on Eurostat

Table 1.12 Sugar beet production and white sugar balance in the EU-28 (million t white sugar equivalent)

	2015/16	2016/17	EU-28			% variation			
			2017/18	2018/19e	2019/20f	18/19 vs 17/18	18/19 vs 5-yr. av.*	19/20 vs 18/19	19/20 vs 5-yr. av.*
Beginning stocks	4.0	1.9	2.2	2.4	1.7	9.9	-8.3	-28.6	-29.0
White sugar production	14.9	16.8	21.3	17.6	17.5	-17.3	-0.5	-0.8	-2.9
Imports	2.9	2.5	1.3	1.9	2.0	44.7	-33.8	8.1	-19.4
Availabilities	21.9	21.2	24.8	21.9	21.2	-11.6	-6.0	-3.1	-7.7
Total domestic uses white sugar	18.6	17.7	19.0	18.6	18.6	-2.3	-1.7	0.0	-4.6
- Human	16.6	16.2	17.3	16.8	16.8	-2.8	-0.9	0.0	-4.6
o.w. net exports in processed products	0.9	1.0	1.0	1.1	1.1	4.2	18.0	1.2	12.7
- Industrial	1.9	1.5	1.8	1.8	1.8	2.9	-2.2	0.0	1.9
o.w. bioethanol	1.1	0.8	0.9	1.0	1.0	11.1	-1.9	0.0	4.9
Exports	1.4	1.3	3.4	1.6	1.4	-52.3	13.6	-12.5	5.0
Total uses	19.9	19.0	22.4	20.2	20.0	-9.8	-1.5	-1.0	-4.6
End stocks	1.9	2.2	2.4	1.7	1.3	-28.6	-29.0	-27.1	-22.0
Self-sufficiency rate %	80 %	95 %	112 %	95 %	94 %				
Sugar beet production for sugar	93 967	106 077	136 398	111 205	112 511	-18.5	-0.4	1.2	-1.3

SPECIALISED CROPS

OLIVE OIL

Table 1.13 EU-28 Olive oil balance sheets (1000 t)

	2015/16	2016/17	EU-28			% variation			
			2017/18	2018/19e	2019/20f	18/19 vs 17/18	18/19 vs 5-yr.av.*	19/20 vs 18/19	19/20 vs 5-yr.av.*
Production	2 324	1 742	2 188	2 264	2 055	3.5	11.3	-9.2	3.2
Total domestic use	1 626	1 385	1 597	1 421	1 575	-11.0	-10.2	10.9	3.6
Imports	97	90	180	135	100	-25.0	4.6	-25.9	-31.3
Exports	573	558	563	650	610	15.4	15.9	-6.2	6.9
End stocks	433	323	531	859	829	61.8	101.8	-3.5	75.8
Self-sufficiency rate %	143	126	137	159	130				

PEACHES AND NECTARINES

Table 1.14 EU Peaches market balance sheets (1000 t)

	2015	2016	EU-28			% variation			
			2017	2018	2019f	2018 vs 2017	2018 vs 5-yr.av.*	2019 vs 2018	2019 vs 5-yr.av.*
Production (total)	4 184	3 986	4 362	4 000	4 147	-8.3	-2.6	3.7	-0.3
Production (fresh)	3 473	3 312	3 622	3 283	3 412	-9.3	-3.0	3.9	-0.4
of which IT, EL, ES and FR	3 320	3 179	3 491	3 163	3 291	-9.4	-2.6	4.1	0.0
Imports (fresh peaches and nectarines)	28	31	27	35	35	28.6	20.5	1.4	19.8
Exports (fresh peaches and nectarines)	297	226	251	155	157	-38.2	-46.0	1.1	-38.9
Apparent consumption (fresh)	3 204	3 117	3 398	3 163	3 290	-6.9	1.1	4.0	2.9
Consumption (fresh) per capita EU (kg)	6	6	7	6	6	-7.1	0.3	3.8	2.1
Area (1000ha)	201	196	192	184	177	-4.3	-8.5	-3.6	-9.6
Yield (t/ha)	17	17	19	18	19	-5.3	5.8	7.8	10.0
Production (for processing)	711	675	740	716	734	-3.2	-0.5	2.6	0.3
of which EL and ES	615	583	643	635	639	-1.2	2.2	0.6	0.1
Imports ¹	16	17	18	12	15	-34.3	-33.3	27.7	-7.8
Exports ¹	138	142	130	124	134	-5.0	-5.1	8.2	0.7
Apparent consumption (processed products)	588	549	628	604	616	-3.7	-0.4	1.9	-0.1
Consumption (processed) per capita EU (kg)	1	1	1	1	1	-4.0	-1.2	1.7	-0.8
Area (1000ha)	28	29	29	30	31	0.7	11.7	3.1	10.1
Yield (t/ha)	25	23	25	24	24	-3.9	-12.3	-0.6	-10.5
Self-sufficiency rate %	110	109	108	106	106				

¹canned and dried peaches in fresh equivalent

Source: DG Agriculture and Rural Development, based on Eurostat

APPLES

Table 1.15 EU Apple market balance sheets (1000 t)

	EU-28					% variation			
	2015/16	2016/17	2017/18	2018/19e	2019/20f	18/19 vs 17/18	18/19 vs 5-yr.av.*	19/20 vs 18/19	19/20 vs 5-yr.av.*
Area	539	524	522	523	522	0.2	-1.1	-0.2	-0.8
Yield	24	24	19	26	22	37.3	15.8	-17.5	-7.6
Gross production	12 768	12 552	10 041	13 813	11 374	37.6	14.4	-17.7	-8.4
Losses and feed use	823	798	632	860	698	36.1	109	-18.8	-11.6
EU usable production	11 945	11 754	9 409	12 953	10 676	37.7	14.7	-17.6	-8.2
EU production for processing	3 601	3 817	3 247	5 345	3 500	64.6	45.5	-34.5	-13.1
Exports (processing)	595	709	503	1 337	950	165.9	98.1	-29.0	10.5
Imports (processing)	982	901	1 561	1 013	1 050	-35.1	-5.9	3.7	-1.4
Consumption (processing)	3 988	4 010	4 305	5 021	3 600	16.6	23.2	-28.3	-15.0
per capita (processed/kg)	8	8	8	10	7	16.3	22.1	-28.5	-15.7
EU production for fresh consumption	8 344	7 937	6 162	7 608	7 176	23.5	-0.2	-5.7	-5.5
Exports (fresh)	1 586	1 475	737	1 213	900	64.7	-15.5	-25.8	-33.7
Imports (fresh)	451	432	556	459	500	-17.5	-5.1	9.0	8.8
Consumption (fresh)	7 209	6 895	5 982	6 853	6 776	14.6	2.8	-1.1	1.2
per capita (fresh/kg)	14	14	12	13	13	14.2	1.8	-1.4	0.3
Self-sufficiency rate %	114	115	98	116	110				

TOMATOES

Table 1.16 EU tomato market balance sheets (1000 t)

	EU-28					% variation			
	2015	2016	2017	2018	2019f	2018 vs 2017	2018 vs 5-yr.av.*	2019 vs 2018	2019 vs 5-yr.av.*
Production (total)	17 725	17 959	17 399	16 176	16 807	-7.0	-4.4	3.9	-1.8
Production (processing)	10 454	10 851	10 592	9 408	9 953	-11.2	-5.9	5.8	-2.1
of which ES, IT, PT	9 452	9 898	9 727	8 585	9 063	-11.7	-5.5	5.6	-2.0
other EU countries	1 002	953	865	823	890	-4.8	-9.8	8.1	-2.6
Imports (fresh equivalent)	2 537	2 966	2 245	2 178	2 413	-3.0	-10.7	10.8	-1.2
Exports (fresh equivalent)	2 393	2 636	2 559	2 678	3 553	4.6	8.8	32.7	42.0
Consumption (Processing)	10 598	11 182	10 278	8 909	8 813	-13.3	-10.7	-1.1	-12.8
per capita processing EU-28	21	22	20	17	17	-13.5	-11.2	-1.2	-13.3
Production (fresh)	7 271	7 108	6 807	6 768	6 855	-0.6	-2.4	1.3	-1.5
of which ES, IT, NL, FR, EL, RO	5 656	5 459	5 139	5 115	5 105	-0.5	-4.0	-0.2	-4.2
other EU countries	1 615	1 649	1 667	1 653	1 750	-0.8	3.1	5.9	7.5
Imports	481	525	570	628	629	10.1	25.4	0.1	16.8
Exports	202	159	131	117	118	-10.2	-49.3	0.6	-35.1
Consumption (Fresh)	7 550	7 474	7 246	7 279	7 365	0.4	1.1	1.2	0.7
per capita (fresh) EU (kg)	15	15	14	14	14	0.2	0.4	1.0	0.1
Self-sufficiency rate %	98	96	99	100	104				

* consumption also includes stock variation

Source: DG Agriculture and Rural Development, based on Eurostat

DAIRY

Table 1.17 Milk supply and utilisation in the EU-28

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Dairy cows (million heads) ¹	23.4	23.3	23.1	22.7	22.5	22.4	-0.3	-1.0	-1.7	-0.6	-0.5
of which EU-15	18.1	18.1	17.9	17.6	17.4	17.3	-0.1	-1.0	-2.1	-0.8	-0.5
of which EU-N13	5.2	5.2	5.1	5.1	5.1	5.1	-1.1	-0.8	-0.2	-0.1	-0.5
Milk yield (kg/dairy cow) ²	6 860	6 917	7 068	7 246	7 327	7 415	0.8	2.2	2.5	1.1	1.2
of which EU-15	7 356	7 403	7 567	7 787	7 881	7 960	0.6	2.2	2.9	1.2	1.0
of which EU-N13	5 134	5 209	5 321	5 384	5 438	5 557	1.5	2.1	1.2	1.0	2.2
Milk production (million t)	162.9	163.4	165.3	166.7	167.4	168.6	0.3	1.1	0.9	0.4	0.7
of which EU-15	133.7	134.4	136.0	137.0	137.6	138.2	0.5	1.2	0.8	0.4	0.5
of which EU-N13	29.2	29.0	29.3	29.7	29.8	30.4	-0.5	1.0	1.4	0.3	1.7
Feed use (million t)	3.4	3.7	3.4	3.3	3.3	3.3	6.9	-8.2	-0.5	-0.9	-1.2
On farm use and direct sales (mio t)	6.7	6.4	5.9	6.0	5.9	5.9	-4.3	-7.8	2.2	-2.4	1.1
Delivered to dairies (million t)	152.8	153.4	156.0	157.4	158.2	159.4	0.4	1.7	0.9	0.5	0.7
of which EU-15	130.9	131.2	133.2	134.1	134.6	135.3	0.2	1.5	0.7	0.4	0.5
of which EU-N13	21.9	22.2	22.9	23.3	23.6	24.1	1.4	3.1	1.9	1.2	2.0
Delivery ratio (%) ³	93.8	93.8	94.4	94.4	94.5	94.5	0.1	0.6	0.0	0.1	0.0
of which EU-15	97.9	97.6	97.9	97.9	97.9	97.9	-0.3	0.3	-0.1	0.0	0.0
of which EU-N13	75.1	76.5	78.0	78.4	79.0	79.2	1.9	2.0	0.5	0.8	0.3
Fat content of milk (%)	4.01	4.07	4.05	4.03	4.07	4.07	1.5	-0.4	-0.4	1.0	0.0
Protein content of milk (%)	3.36	3.42	3.46	3.46	3.51	3.51	1.8	1.0	0.1	1.5	0.0

¹ Dairy cow numbers refer to the end of the year (historical figures from the December cattle survey).

² Milk yield is dairy cow production per dairy cows (dairy cows represent 99.7% of EU total production).

³ Delivery ratio is milk delivered to dairies per total production.

Table 1.18 EU-28 fresh dairy products market balance (1000 t)

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Production	46 809	46 276	46 315	45 719	45 475	45 278	-1.1	0.1	-1.3	-0.5	-0.4
of which Drinking Milk	31 275	30 764	30 708	30 131	29 829	29 531	-1.6	-0.2	-1.9	-1.0	-1.0
of which Cream	2 741	2 736	2 785	2 697	2 764	2 778	-0.2	1.8	-3.2	2.5	0.5
of which Acidified Milk	8 056	8 160	8 212	8 217	8 176	8 217	1.3	0.6	0.1	-0.5	0.5
of which Other Fresh Products ²	4 738	4 617	4 610	4 674	4 706	4 752	-2.6	-0.1	1.4	0.7	1.0
of which EU-15	40 194	39 625	39 520	38 919	38 608	38 376	-1.4	-0.3	-1.5	-0.8	-0.6
of which EU-N13	6 615	6 651	6 795	6 800	6 868	6 902	0.5	2.2	0.1	1.0	0.5
Imports (extra EU)	12	14	26	18	18	18	19	78	-30	0	0
Exports (extra EU)	962	1 168	1 134	1 093	1 202	1 262	21	-3	-4	10	5
Domestic use ¹	45 859	45 123	45 207	44 644	44 291	44 033	-1.6	0.2	-1.2	-0.8	-0.6
p.c. consumption (kg)	90.5	88.8	88.7	87.4	86.6	86.0	-1.9	-0.1	-1.5	-0.9	-0.7
Self-sufficiency rate (%)	102	103	102	102	103	103					

¹ Domestic use includes stock changes.

² Includes buttermilk, drinks with milk base and other fresh commodities.

Notes: The figures on imports and exports are referring to total trade, i.e. including inward processing.

The figures on production were updated with the update of Eurostat database on 5th April.

Statistical Annex

Table 1.19 EU-28 cheese market balance (1000 t)

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Production (in dairies)	9 872	10 100	10 237	10 337	10 420	10 480	2.3	1.3	1.0	0.8	0.6
of which from pure cow's milk	9 030	9 240	9 350	9 424	9 500	9 554	2.3	1.2	0.8	0.8	0.6
of which from other milk ¹	842	860	887	913	920	925	2.2	3.1	2.9	0.8	0.6
EU-15 (in dairies)	8 444	8 607	8 682	8 765	8 835	8 879	1.9	0.9	0.9	0.8	0.5
EU-N13 (in dairies)	1 428	1 494	1 554	1 572	1 585	1 601	4.6	4.1	1.2	0.8	1.0
Processed cheese impact ²	333	349	352	356	359	362	4.8	1.1	1.1	0.9	0.9
Total production	10 204	10 449	10 589	10 693	10 779	10 842	2.4	1.3	1.0	0.8	0.6
Imports (extra EU) ³	61	71	60	59	59	59	15.0	-15.6	-0.8	0.0	0.0
Exports (extra EU)	719	800	829	832	847	856	11.3	3.6	0.5	1.8	1.0
Total domestic use	9 534	9 746	9 820	9 920	9 991	10 045	2.2	0.8	1.0	0.7	0.5
Stock changes	14	- 26	0	0	0	0					
Processing use	292	303	307	309	312	315	3.7	1.4	0.6	1.0	1.0
Human consumption	9 241	9 442	9 513	9 611	9 679	9 730	2.2	0.7	1.0	0.7	0.5
of which EU-15	8 114	8 267	8 309	8 393	8 434	8 469	1.9	0.5	1.0	0.5	0.4
of which EU-N13	1 127	1 175	1 204	1 218	1 244	1 261	4.2	2.4	1.2	2.2	1.4
p.c. consumption (kg)	18.2	18.6	18.7	18.8	18.9	19.0	1.9	0.5	0.8	0.5	0.4
Self-sufficiency rate (%)	107	107	108	108	108	108					

¹ Other milk includes goat, ewe and buffalo milk.

² Processed cheese impact includes production and net exports of processed cheese.

³ Imports and exports include processed cheese.

Table 1.20 EU-28 whole milk powder market balance (1000 t)

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Production	721	734	779	731	694	687	1.8	6.2	-6.3	-5.0	-1.0
of which EU-15	669	686	736	690	655	649	2.7	7.2	-6.3	-5.0	-1.0
of which EU-N13	52	47	44	41	39	38	-9.1	-7.9	-6.3	-5.0	-1.0
Imports	4	6	2	2	2	2	44	-72	9	0	0
Exports	400	381	393	334	284	270	-4.7	3.0	-14.9	-15.0	-5.0
Domestic Use ¹	325	358	388	398	412	419	10.4	8.3	2.6	3.4	1.8
Self-sufficiency rate (%)	222	205	201	184	169	164					

¹ Domestic use includes stock changes.

Table 1.21 EU-28 skimmed milk powder market balance (1000 t)

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Production	1 537	1 560	1 529	1 531	1 577	1 649	1.5	-2.0	0.1	3.0	4.6
of which EU-15	1 324	1 342	1 327	1 308	1 347	1 408	1.4	-1.1	-1.5	3.0	4.5
of which EU-N13	213	218	202	223	230	242	2.4	-7.7	10.7	3.0	5.0
Imports (extra EU)	3	4	2	3	5	5	8	-33	41	30	0
Exports (extra EU)	692	575	780	821	952	829	-17	36	5	16	-13
Domestic use	740	767	797	851	853	855	3.7	3.9	6.7	0.3	0.2
Ending stocks	279	501	456	319	95	65					
Private (industry)	250	150	80	220	95	65					
Public (intervention)	29	351	376	99	0	0					
Stock changes	109	222	- 45	- 137	- 224	- 30					
Self-sufficiency rate (%)	208	203	192	180	185	193					

Source: DG Agriculture and Rural Development, based on Eurostat

Table 1.22 EU-28 butter market balance (1000 t)

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Production	2 301	2 393	2 414	2 438	2 499	2 524	4.0	0.9	1.0	2.5	1.0
of which EU-15	2 023	2 094	2 112	2 131	2 184	2 206	3.5	0.9	0.9	2.5	1.0
of which EU-N13	277	299	302	307	315	318	7.8	1.1	1.7	2.5	1.0
Imports	3	3	3	9	11	11	11	3	197	29	0
Exports	172	206	170	157	173	193	20	-18	-8	10	12
Domestic use	2 121	2 209	2 257	2 290	2 322	2 357	4.1	2.2	1.5	1.4	1.5
p.c. consumption (kg)	4.2	4.3	4.4	4.5	4.5	4.6	3.9	1.9	1.2	1.3	1.4
Ending stocks	135	115	106	105	120	105					
Private	135	115	105	105	120	105					
Public (intervention)	0	0	1	0	0	0					
Stock changes	10	-20	-10	0	15	-15					
Self-sufficiency rate (%)	108	108	107	106	108	107					

Note:
Data refer to butter, butter oil and other yellow fat products expressed in butter equivalent. Figures on imports and exports do not include inward/outward processing.

MEAT

Table 1.23 EU-28 overall meat balance (1000 t carcass weight equivalent)

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Gross Indigenous Production	45 995	47 362	47 265	48 550	48 970	49 490	3.0	-0.2	2.7	0.9	1.1
Live Imports	2	2	2	2	2	2					
Live Exports	247	291	309	311	280	282	17.8	6.3	0.6	-9.8	0.8
Net Production	45 750	47 073	46 958	48 242	48 692	49 210	2.9	-0.2	2.7	0.9	1.1
of which EU-15	37 827	38 704	38 432	39 274	39 611	39 914	2.3	-0.7	2.2	0.9	0.8
of which EU-N13	7 923	8 370	8 526	8 968	9 080	9 296	5.6	1.9	5.2	1.3	2.4
Meat Imports	1 368	1 402	1 261	1 303	1 314	1 348	2.4	-10.1	3.3	0.9	2.5
Meat Exports	3 837	4 627	4 410	4 551	5 182	5 691	20.6	-4.7	3.2	13.9	9.8
Consumption	43 281	43 849	43 809	44 993	44 825	44 867	1.3	-0.1	2.7	-0.4	0.1
Population (mio)	509.4	510.9	512.1	513.4	514.6	515.8	0.3	0.2	0.3	0.2	0.2
Per Capita Consumption (kg)	67.9	68.6	68.4	70.1	69.8	69.7	1.1	-0.3	2.5	-0.5	-0.1
Self-sufficiency (%)	106	108	108	108	109	110					

Note:
Meat production data excludes the offal and fat categories (with the exception of pork lard).
Meat per capita consumption is in retail weight. Coefficients to transform carcass weight into retail weight are:
0.7 for beef and veal meat; 0.78 for pigmeat; 0.88 for both poultry meat, and sheep and goat meat.

Statistical Annex

Table 1.24 EU-28 beef/veal market balance (1000 t carcass weight equivalent)

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Gross Indigenous Production	7 835	8 070	8 104	8 242	8 164	8 110	3.0	0.4	1.7	-0.9	-0.7
Live Imports	0	0	0	0	0	0					
Live Exports	178	219	235	234	197	199	23.0	7.4	-0.3	-16.0	1.0
Net Production	7 657	7 851	7 869	8 008	7 967	7 911	2.5	0.2	1.8	-0.5	-0.7
of which EU-15	6 819	6 974	6 931	7 059	7 031	6 961	2.3	-0.6	1.8	-0.4	-1.0
of which EU-N13	838	877	937	949	936	950	4.6	6.9	1.2	-1.3	1.5
Meat Imports	300	304	285	312	303	309	1.4	-6.3	9.5	-3.0	2.0
Meat Exports	211	248	271	252	272	285	17.7	9.0	-7.0	8.0	5.0
Consumption	7 747	7 907	7 883	8 068	7 998	7 935	2.1	-0.3	2.3	-0.9	-0.8
Per Capita Consumption (kg)	10.6	10.8	10.8	11.0	10.9	10.8	1.8	-0.5	2.1	-1.1	-1.0
Share in total meat consumption	17.9	18.0	18.0	17.9	17.8	17.7					
Self-sufficiency (%)	101	102	103	102	102	102					

Table 1.25 EU-28 pigmeat market balance (1000 t carcass weight equivalent)

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Gross Indigenous Production	23 456	23 876	23 673	24 098	24 202	24 557	1.8	-0.9	1.8	0.4	1.5
Live Imports	0	0	0	0	0	0					
Live Exports	21	10	13	16	13	13	-51.9	30.0	27.9	-20.0	0.0
Net Production	23 436	23 866	23 660	24 082	24 189	24 544	1.8	-0.9	1.8	0.4	1.5
of which EU-15	19 903	20 261	20 049	20 381	20 547	20 855	1.8	-1.0	1.7	0.8	1.5
of which EU-N13	3 533	3 605	3 611	3 701	3 641	3 689	2.1	0.1	2.5	-1.6	1.3
Meat Imports	11	12	14	15	16	17	6.1	16.7	5.5	5.0	10.0
Meat Exports	2 218	2 813	2 574	2 678	3 214	3 664	26.8	-8.5	4.1	20.0	14.0
Consumption	21 229	21 065	21 100	21 419	20 990	20 898	-0.8	0.2	1.5	-2.0	-0.4
Per Capita Consumption (kg)	32.5	32.2	32.1	32.5	31.8	31.6	-1.1	-0.1	1.2	-2.2	-0.7
Share in total meat consumption	49.0	48.0	48.2	47.6	46.8	46.6					
Self-sufficiency (%)	110	113	112	113	115	118					

Source: DG Agriculture and Rural Development, based on Eurostat

Table 1.26 EU-28 poultry meat market balance (1000 t carcass weight equivalent)

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Gross Indigenous Production	13 797	14 503	14 564	15 260	15 635	15 863	5.1	0.4	4.8	2.5	1.5
Live Imports	1	2	2	2	2	2					
Live Exports	10	10	8	9	10	10	-7.7	-12.7	10.9	2.0	2.0
Net Production	13 788	14 495	14 557	15 252	15 628	15 856	5.1	0.4	4.8	2.5	1.5
of which EU-15	10 318	10 691	10 664	11 049	11 246	11 323	3.6	-0.3	3.6	1.8	0.7
of which EU-N13	3 470	3 803	3 894	4 203	4 382	4 533	9.6	2.4	8.0	4.2	3.5
Meat Imports	855	882	789	802	850	867	3.3	-10.6	1.7	6.0	2.0
Meat Exports	1 388	1 546	1 532	1 593	1 665	1 710	11.4	-0.9	4.0	4.5	2.7
Consumption	13 254	13 831	13 814	14 462	14 813	15 013	4.4	-0.1	4.7	2.4	1.3
Per Capita Consumption (kg)	22.9	23.8	23.7	24.8	25.3	25.6	4.0	-0.3	4.4	2.2	1.1
Share in total meat consumption	30.6	31.5	31.5	32.1	33.0	33.5					
Self-sufficiency (%)	104	105	105	106	106	106					

Table 1.27 EU-28 sheep and goat meat market balance (1000 t carcass weight equivalent)

	EU-28						% variation				
	2015	2016	2017	2018	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Gross Indigenous Production	907	914	925	950	969	960	0.8	1.2	2.7	2.0	-1.0
Live Imports	0	0	0	0	0	0					
Live Exports	38	52	52	51	61	61	38.4	0.4	-3.6	20.0	0.0
Net Production	869	862	872	899	908	899	-0.9	1.2	3.1	1.0	-1.0
of which on-farm slaughterings ¹	101	103	99	126	125	124	2.4	-4.6	28.3	-1.0	-1.0
of which EU-15	787	778	788	784	787	776	-1.2	1.3	-0.5	0.4	-1.5
of which EU-N13	82	84	84	115	121	123	2.0	0.8	36.5	5.0	2.0
Meat Imports	202	203	173	174	146	155	0.4	-14.9	0.6	-16.0	6.0
Meat Exports	20	19	34	29	32	32	-4.7	80.9	-16.7	11.0	2.0
Consumption	1 052	1 046	1 011	1 045	1 023	1 021	-0.6	-3.3	3.4	-2.1	-0.1
Per Capita Consumption (kg)	1.8	1.8	1.7	1.8	1.7	1.7	-0.8	-3.6	3.1	-2.3	-0.4
Share in total meat consumption	2.4	2.4	2.3	2.3	2.3	2.3					
Self-sufficiency (%)	86	87	91	91	95	94					

¹ 2018 net production was revised upward because of a change in the data of on-farm slaughterings in Romania

Table 1.28 Share of EU-28 exports by destination (volume)

		Cereals	Soft wheat	Barley	Meat, offal, live	Beef*	Pork*	Poultry*	Infant formula	Dairy products	Cheese curd	SMP and WMP	Whey powder	Olive oil	Wine
China	2008	1%	0%	3%	4%	0%	6%	0%	5%	5%	0%	1%	22%	2%	3%
	2018	2%	1%	6%	21%	1%	35%	0%	45%	15%	2%	10%	31%	6%	12%
	2019 Jan-Jul	3%	0%	12%	28%	3%	44%	1%	45%	16%	2%	12%	33%	6%	11%
ASEAN	2008	2%	1%	5%	4%	1%	3%	6%	14%	10%	1%	6%	28%	1%	2%
	2018	2%	1%	5%	12%	6%	12%	17%	3%	19%	3%	21%	39%	2%	2%
	2019 Jan-Jul	3%	3%	7%	12%	8%	10%	18%	3%	20%	3%	27%	38%	2%	2%
North Africa	2008	38%	45%	15%	0%	3%	0%	0%	10%	15%	6%	29%	4%	1%	0%
	2018	33%	42%	16%	2%	12%	0%	0%	8%	12%	9%	22%	2%	1%	1%
	2019 Jan-Jul	32%	39%	13%	2%	14%	0%	0%	9%	10%	9%	16%	2%	1%	1%
Other Africa	2008	17%	20%	11%	9%	8%	5%	22%	8%	12%	2%	21%	4%	2%	13%
	2018	17%	22%	11%	16%	16%	6%	40%	4%	9%	3%	12%	3%	2%	7%
	2019 Jan-Jul	22%	28%	13%	16%	17%	5%	42%	5%	9%	3%	11%	5%	2%	8%
Middle East	2008	21%	16%	37%	6%	5%	1%	18%	24%	18%	9%	26%	3%	2%	1%
	2018	30%	25%	42%	5%	15%	1%	9%	12%	15%	16%	18%	3%	3%	1%
	2019 Jan-Jul	20%	18%	28%	5%	16%	1%	7%	14%	15%	15%	18%	3%	3%	1%
US	2008	1%	0%	0%	2%	0%	3%	0%	3%	7%	23%	0%	0%	51%	37%
Mexico	2018	1%	0%	3%	4%	1%	5%	1%	2%	6%	20%	1%	1%	43%	39%
Canada	2019 Jan-Jul	1%	0%	3%	3%	2%	4%	1%	1%	7%	19%	3%	1%	43%	39%

Note: * meat, offal and live animals

Source: COMEXT-Eurostat

Group definitions:

ASEAN: Myanmar, Philippines, Thailand, Laos, Vietnam, Cambodia, Indonesia, Malaysia, Brunei Darussalam, Singapore

North Africa: Libya, Tunisia, Algeria, Morocco, Egypt

Other Africa: Sudan, Lesotho, Mauritania, Mali, Burkina Faso, Niger, Chad, Cape Verde, Senegal, Gambia, Guinea-Bissau, Guinea, Sierra Leone, Liberia, Ivory

Coast, Ghana, Togo, Benin, Nigeria, Cameroon, Central African Republic, Equatorial Guinea, Sao Tome and Principe, Gabon, Congo, Democratic Republic of

Congo, Rwanda, Burundi, St. Helena ascension and Tristan da Cuhna, Angola, Ethiopia, Eritrea, Djibuti, Somalia, Kenya, Uganda, Tanzania, Seyshelles, British

Indian Ocean Territory, Mozambique, Madagascar, Mauritius, Comoros, mayotte, Zambia, Zimbabwe, Malawi, South Africa, Namibia, Botswana, Swaziland

Middle East: Armenia, Azerbaijan, Lebanon, Syria, Iraq, Iran, Israel, Palestine, Jordan, Saudi Arabia, Kuwait, Bahrain, Qatar, United Arab Emirates, Oman, Yemen, Georgia

NAFTA: US, Mexico, Canada

Source: DG Agriculture and Rural Development, based on Eurostat