SHORT-TERM OUTLOOK

FOR EU AGRICULTURAL MARKETS IN 2018 AND 2019

SPRING 2019

Executive Summary

The **uncertainty surrounding the Brexit** renders **outlook** exercises even more difficult. These market forecasts **relate to the EU-28** as the UK is still a member at the date of the publication.

Cereals, oilseeds and sugar areas in the EU-28 are **expected to decline** in 2019/2020 to around 70.7 million ha. The dry autumn hampered the sowings but mild conditions along the winter give a more positive outlook in the EU. On the basis of historical trend yields, the EU cereals harvest would reach 308 million t.

Oilseeds area is expected to decline by 6%, due to lower 2019/2020 rapeseed sowings. Oilseeds output is looking fairly stable compared to previous crop season, at close to 33 million t.

Lower 2018/2019 sugar production results in lower EU exports. Sugar prices remain low despite a balanced world market and EU sugar beet area is forecast to decrease by 4% in 2019/2020.

Due to the increase in **EU olive oil** production in 2018/2019, the strong world demand for olive oil and lower availabilities in non-EU countries are expected to lead to **record high EU exports**.

Despite the impact of the drought and the significantly lower cow number, the yield increase led to milk deliveries growth in 2018 (+1%). The **EU raw milk price is supported by global demand and it is expected to lead to further production growth in 2019** (assuming normal weather conditions).

EU beef production is expected to decline in 2019 (-1.3%), following a drop in cow herds accelerated by the poor weather conditions in 2018. **Beef consumption is likely to fall in 2019**.

The decrease in sow numbers driven by low prices, African Swine Fever risk and/or environmental restrictions will **constrain pork production growth in 2019**. The level of **EU pigmeat exports in 2019 is uncertain** and highly dependent on the magnitude of Chinese demand expansion, which currently pushes prices up.

Poultry production grew significantly in 2018 driven by reduced chicken breast imports, **growth will moderate in 2019** as imports begin to recover and prices adjust.

Sheep meat production is expected to continue to fall in 2019 (-1%), following a decline in flocks and fewer lamb births amid adverse weather conditions in 2018.

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MACRO-ECONOMIC OUTLOOK

Macroeconomic background

Slowdown of global economic growth

- World economic growth has been revised downwards by several institutes for 2019-2021. The risk for lower growth in the EU-28 is significant, stemming mainly from signs of lower growth in main EU economies, uncertainties on Brexit and a risk of further tariff escalation targeting mainly the automotive sector. Substantial slowdown in growth has been recorded in 2018 in Germany and Italy. Lower energy prices and a rebound of households' confidence could nevertheless support growth in the EU-28.
- The stimulus of the US economy will continue and despite slow progress in trade negotiations with China, US growth is expected to stay robust in 2019-2021. China is foreseen to adopt fiscal and/or monetary policy stimulus measures in order to stabilise GDP-growth at 6-6.5% for the period 2019-2021.
- The diverging development of the Eurozone and the US economies is expected to further delay a convergence of interest rates and the European Central Bank has announced that key interest rates are expected to remain at current levels at least through 2019. The USD/EUR exchange rate is expected to remain relatively stable around current levels for the period 2019-2021.

Macro	2018	2019	2020	2021
Crude Oil Brent (USD/barrel)	65	69	65	66
Exchange rate (USD/EUR)	1.13	1.14	1.12	1.13
GDP EU-28	+2.0%	+1.3%	+1.2%	+1.3%

Source: IHS Markit

- The slowdown in economic growth will ease the demand for oil in 2019-2021. The production limitations agreed by the Vienna alliance together with the continued fall in Venezuelan production and restrictions on Iranian exports are expected to balance the market. Prices are foreseen to remain at USD 65-70/barrel. Prices of natural gas delivered in Europe are foreseen to follow the oil price and thereby remain relatively stable through 2019-2021. The correlation between the price of natural gas and nitrogen fertilisers has historically been strong.

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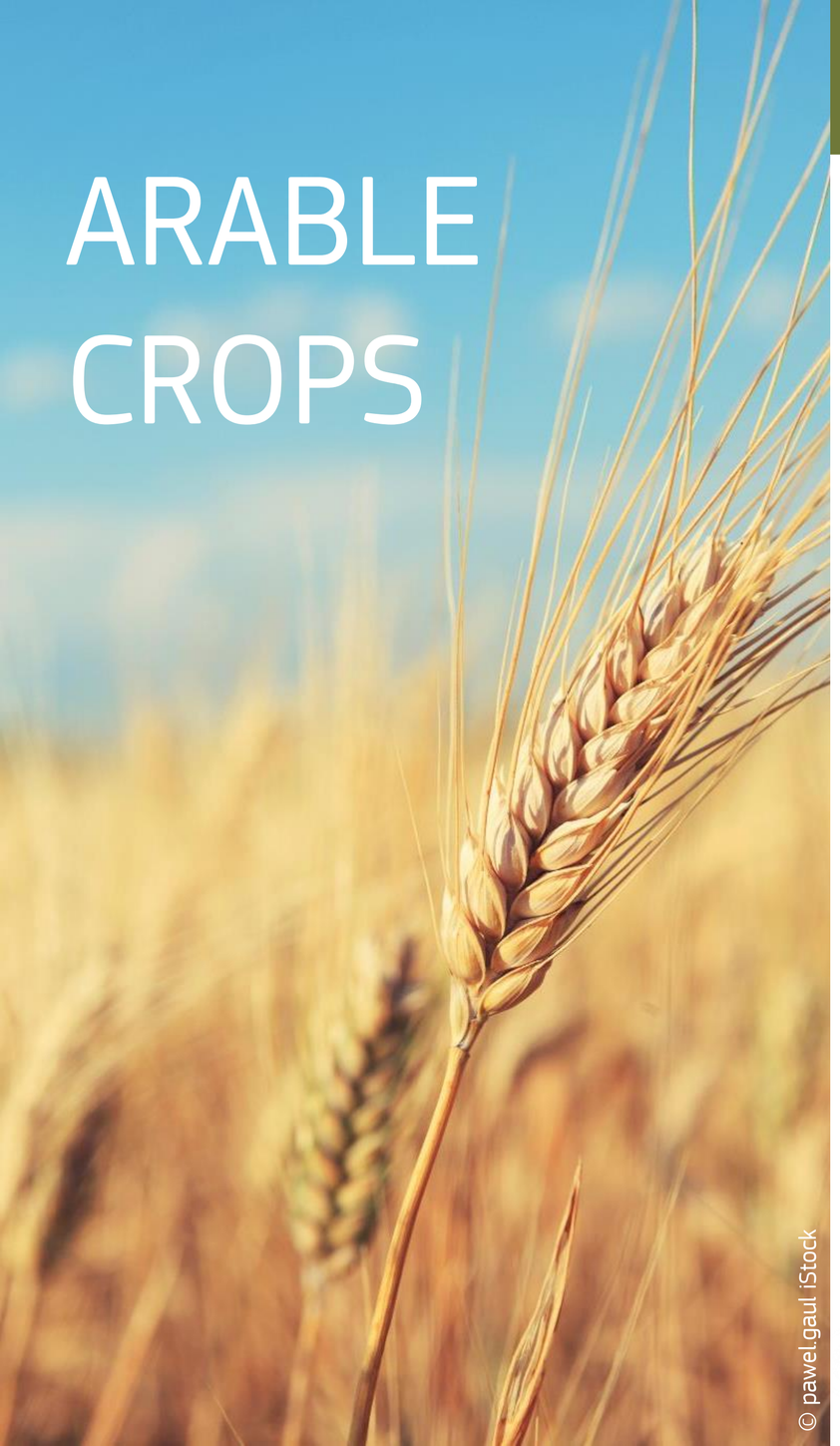
ARABLE CROPS



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Market developments in the EU

CEREALS	2018/2019	2019/2020
Production	+13.5%	-23.5%
Exports	-1%	+2%
Imports	-0%	+3%
Consumption	+2.2%	+7.7%

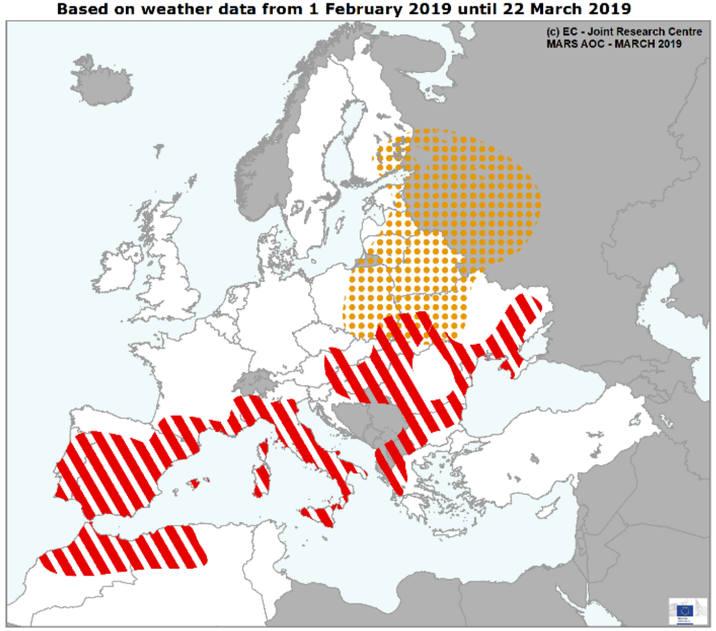
OILSEEDS	2018/2019	2019/2020
Production	-6%	-0.4%
Exports	-33%	+31%
Imports	+11%	-5.9%
Consumption	+0.7%	-3.0%

SUGAR	2018/2019	2019/2020
Production	-17%	+3.9%
Exports	-49%	+0%
Imports	+17%	+0%
Consumption	-2.6%	-2.1%

Note: compared with previous season

AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 1 February 2019 until 22 March 2019



Source: Mars-Bulletin crop monitoring in Europe 27(3)
https://ec.europa.eu/jrc/en/mars/bulletins

- Autumn and winter were characterised by warmer-than-usual conditions in most of Europe.
- Frost damage has been limited in the EU since the beginning of the winter.
- A large part of southern and south-eastern Europe suffer from strong rain deficit which can have further consequences on the harvest, if there is no rain in the coming weeks.

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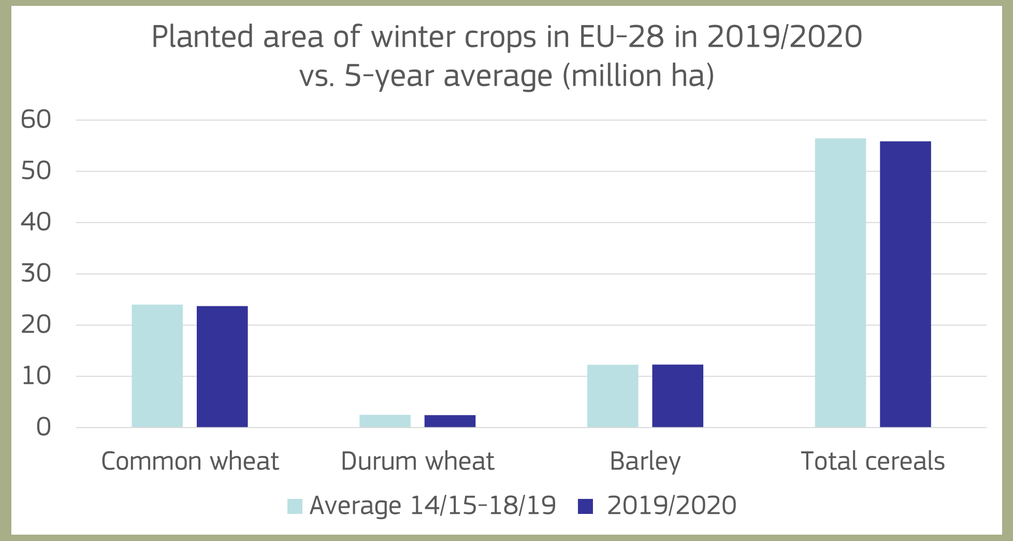
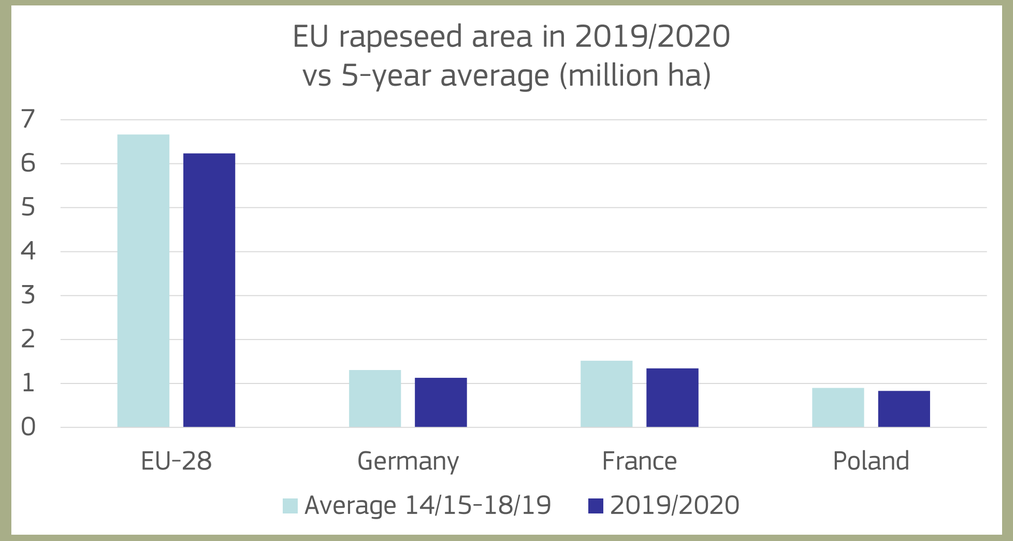
Cereals – Oilseeds – Protein Crops



Source: DG Agriculture and Rural development, based on Eurostat



Source: DG Agriculture and Rural development, based on Eurostat

Cereal production expected to recover in 2019/2020

2018/2019

- **World production**: IGC[1] estimates a **decline** in crop output for both wheat and maize.
- EU cereals output reaches **290.5 million t**, a 7-year low.
- EU Trade: **wheat exports** recently recovered but are still **at historically low levels** (19 million t).

2019/2020

- A **slight increase in total EU cereal area** is expected compared to last season but still below the 5-year average.
- Based on historical trends for yields, the **EU production** is expected to reach **307.5 million t**, if no major disruption occurs.

[1] *IGC: International Grain Council*

Oilseed sowing area to decline while protein crops on the rise

2018/2019

- **World** production: IGC estimates a **rise in soya beans production** (+5%).
- EU **crushing volumes** have slightly increased by 0.7%.

2019/2020

- **Oilseeds area is expected to decline in the EU-28**, especially for rapeseed. A significant decrease of sowing areas happened due to drought conditions during the sowing period in autumn.
- The main producing countries of **rapeseed** have been affected, as for instance, FR (-17%) and DE (-8%).
- **Protein crops**: the overall production is **expected to recover** from last year's low level caused by adverse weather conditions.

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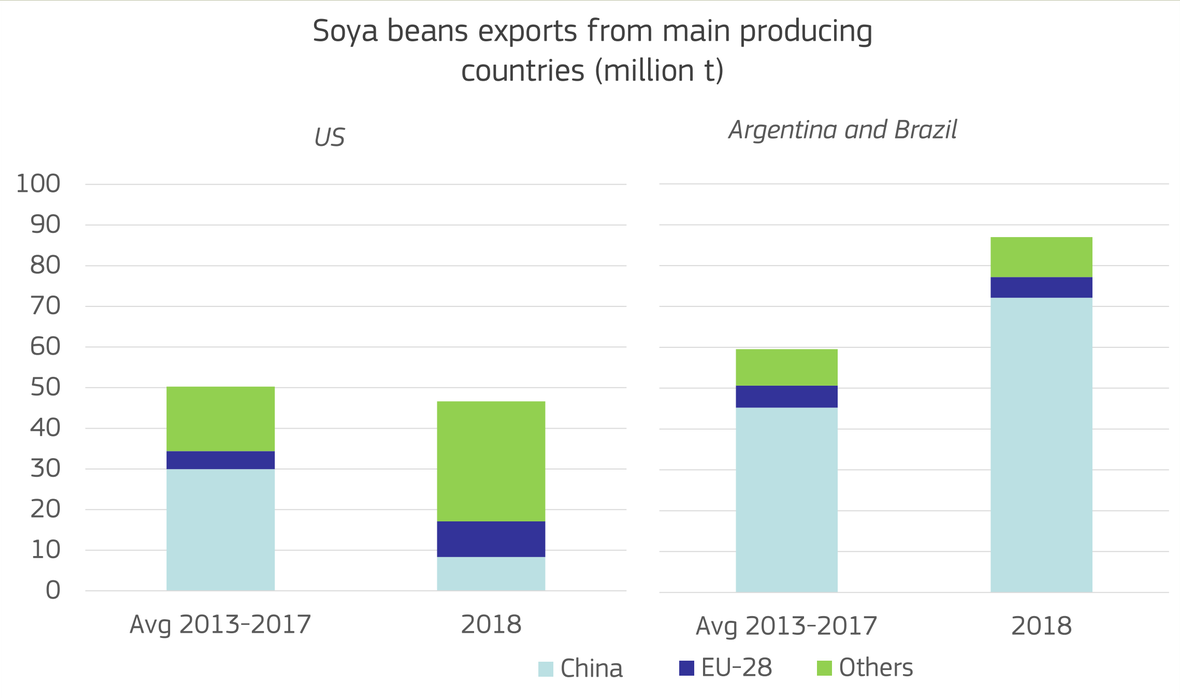
Cereals – Oilseeds – Protein crops

World soya beans trade steady despite trade disruptions

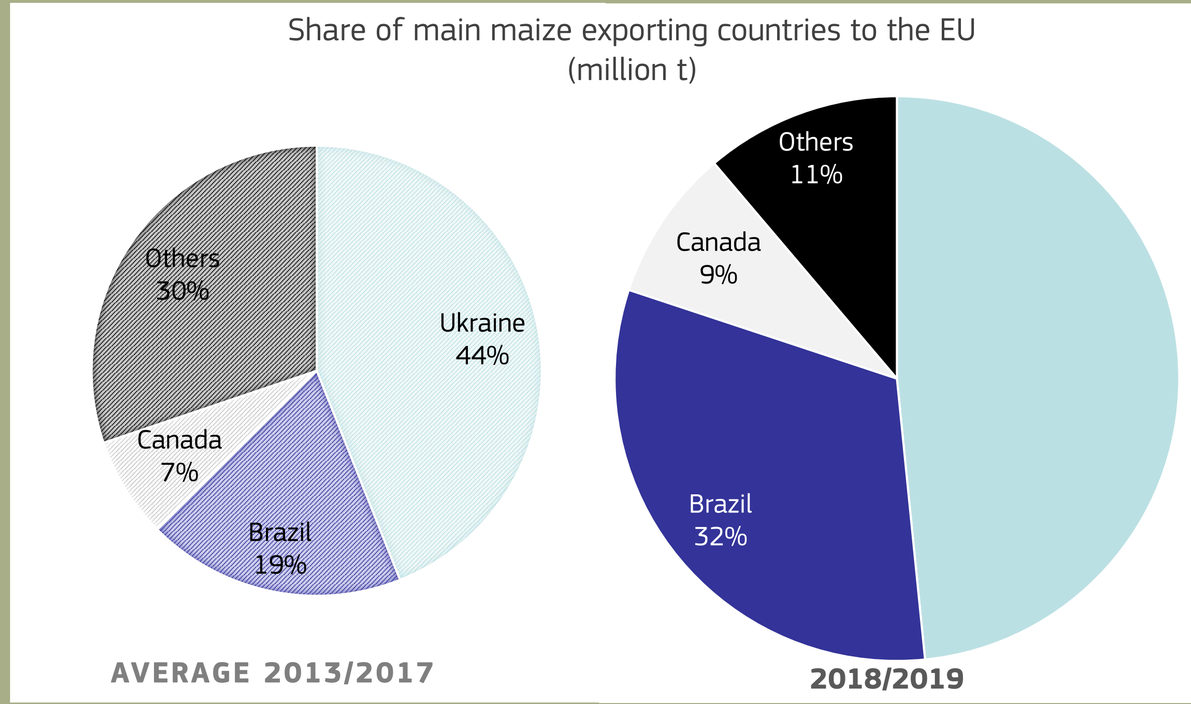


Note: Calendar year

Source: DG Agriculture and Rural development, based on Comext

- **US soya beans exports drop to China in 2018** was partly offset by increased shipments to the EU, Mexico and countries in the Near East and North Africa.
- **Argentina exports rebounded** by more than 250% after a very low production level last season.
- **Soya beans world prices declined** from March 2018 to March 2019 by about 8% (in EUR).
- World and EU soya meal trade has not been impacted significantly.

EU maize imports are surging



Source: DG Agriculture and Rural development, based on Comext

- Following the 2018 drought in the EU, imports of maize have taken up along the marketing year. The **cereal trade balance is expected to end up close to parity** for this marketing year.
- The EU will reach a new **record of maize imports**, at 21 million t (50% more than the 5-year average).
- Traditional exporting countries (Brazil, Ukraine and Canada) are further expanding their share in the EU market.

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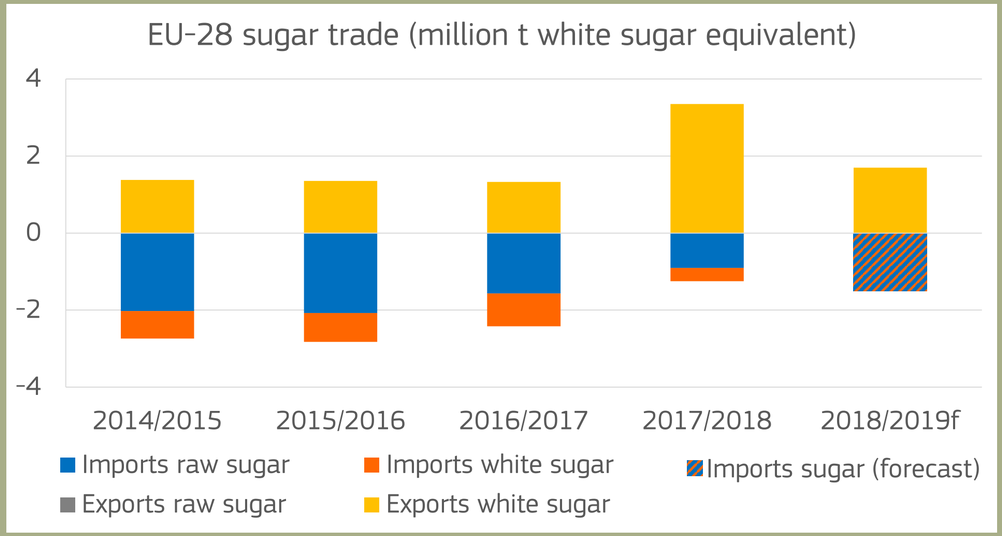
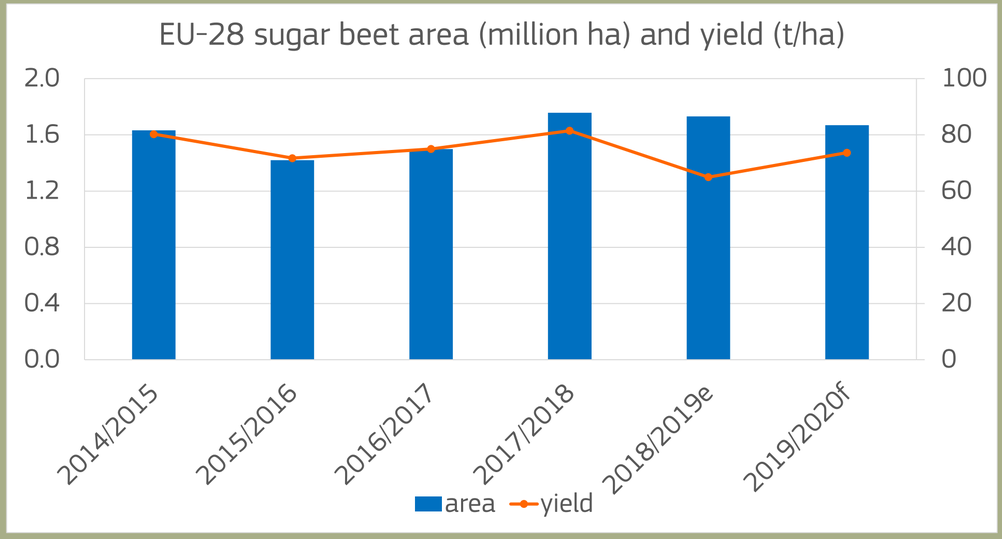
Sugar



Source: DG Agriculture and Rural Development, based on Eurostat Comext



Source: DG Agriculture and Rural Development, based on Eurostat

Contraction in trade following low EU 2018/2019 production

- Adverse weather conditions resulted in **lower 2018/2019 sugar production** estimated at 17.6 million t (-17% year-on-year), resulting in a deficit of 5%.
- A significant decrease in EU sugar exports by 49% is forecast for 2018/2019, down to 1.7 million t. With slightly higher estimated import levels at 1.5 million t compared to 2017/2018, the **EU net trading position deteriorates but remains positive** thanks to mobilisation of stocks from the previous campaign.
- For 2018/2019, the **world market surplus is forecast to remain small** at 0.6 million t (Source: ISO), down from 7.8 million t in 2017/2018. Despite a balanced market, world white **sugar prices** have not yet recovered and **remain low but stable** (EUR 299/t in March 2019).
- The EU white sugar price was EUR 312/t in January 2019, down from EUR 371 in the same month of 2018.

Reduction in sown sugar beet area in 2019/2020

- Low sugar prices are forecast to induce a **reduction in area** of 60 000 ha for the 2019/2020 marketing year compared to the previous year, a decrease **by close to 4%.**
- While **several producing countries introduced exemptions and allow the use of neonicotinoids for the 2019 crop**, beet growers in four main producing countries (FR, NL, DE and UK) will need to find alternative plant protection products. Sugar beet yield is forecast at around 74 t/ha, which is 13% above the previous year's yield, but 3% below the average yield over the five last years.
- Overall, **sugar beet production for 2019/2020 is forecast at 123 million t** (**+9%** compared to 2018/2019) and sugar production could reach 18.3 million t (+4%).

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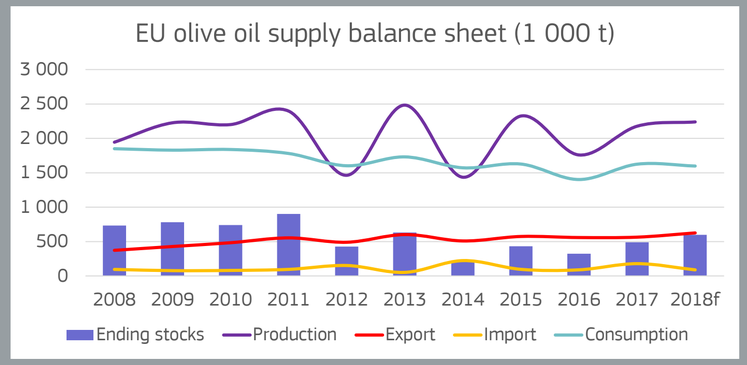
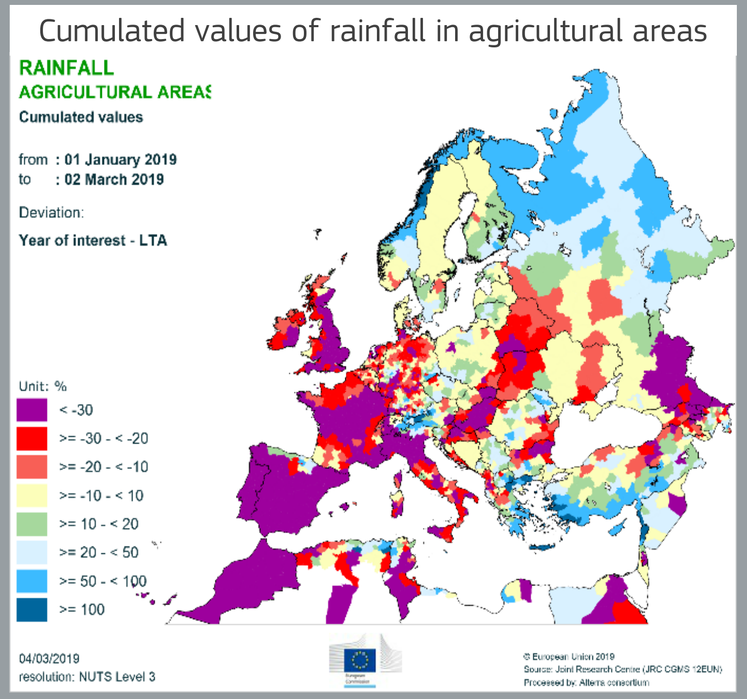
Market developments in the EU



Note: 200X refers to the campaign 10/200X-09/200X+1

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



Source: Joint Research Centre

EU exports expected to be record high in campaign 2018/2019

OLIVE OIL	2017/2018	2018/2019
Production	↑ +24%	↗ +2.9%
Exports	↗ +1.0%	↑ +11%
Imports	↑ +99%	↓ -50%
Consumption	↑ +16%	↘ -1.7%

Note: compared with previous season

- The **second highest production** in **ES** since 2003 (1.7 million t) contributes the most to the **3% EU production increase** in the campaign 2018/2019, despite the production decline in IT, EL and PT.
- The **increased availabilities weigh on prices**. The EU average **price of virgin olive oil** was in February 2019 around **EUR 290/100kg**, 17% below one year ago.
- The **increasing world demand** for EU olive oil and the **lower availabilities in non-EU** countries are expected to support **record high EU exports**. They could increase by 11% up to 625 000 t.
- **For the next campaign (2019/2020), the current lack of rain** in main producing areas could negatively affect production.

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MILK AND DAIRY PRODUCTS

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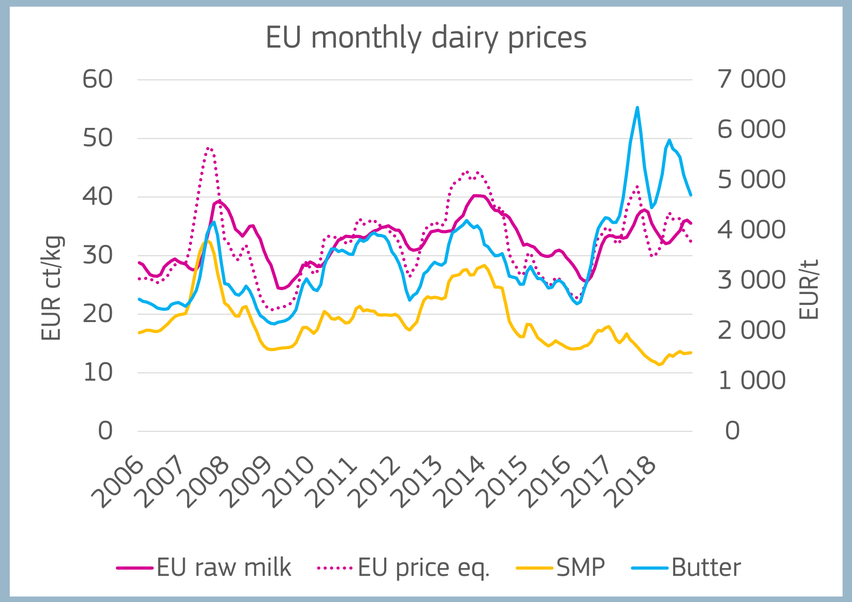
Market developments in the EU

Dairy products	2018	2019
Production	-0.4%	+0.4%
Exports	+0.3%	+0.8%
Imports	+13%	-7%
Consumption	+0.2%	+0.3%

Milk	2018	2019
Milk collection	+0.9%	+0.7%
Dairy herd	-1.6%	-0.6%

Note: compared with previous year

EU raw milk price above average



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

Source: DG Agriculture and Rural Development

In 2018, the **average EU raw milk price** reached more than **EUR 34/100kg**, 2% below 2017 and 2% above the 2013-2017 average.

In 2019, the development of the **EU milk price equivalent** is expected to be driven by the **increase in SMP price** and the **steady butter price** (on average above EUR 4 000/t).

The seasonal rise in milk **collection in spring** and the increase in **milk fat content** could however weigh on milk prices in upcoming months.

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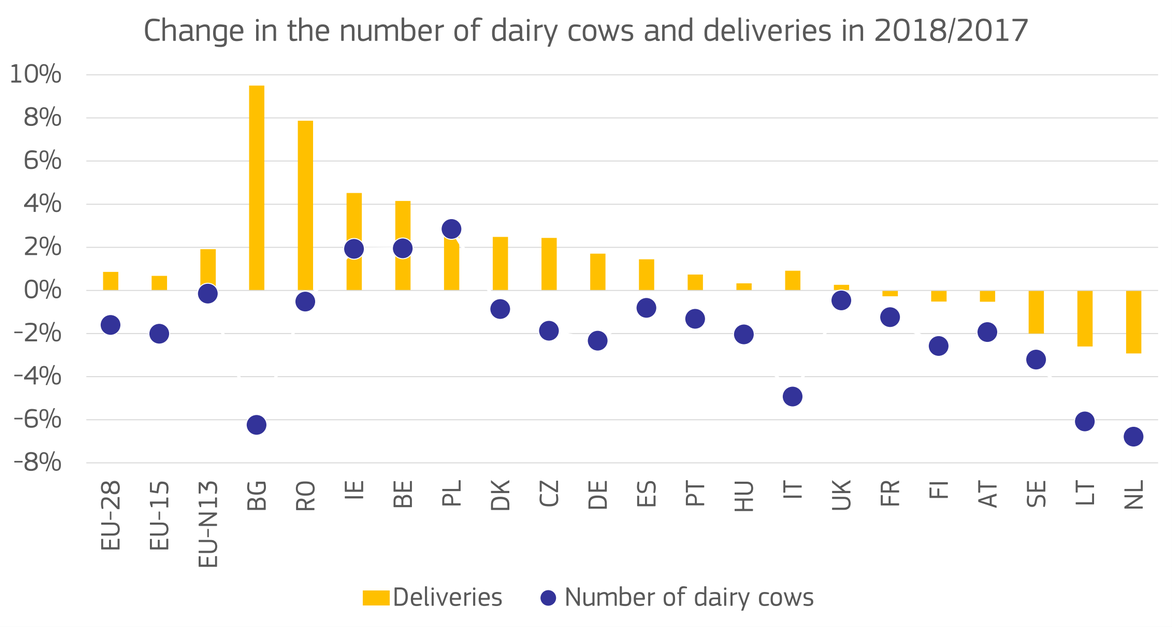
Milk

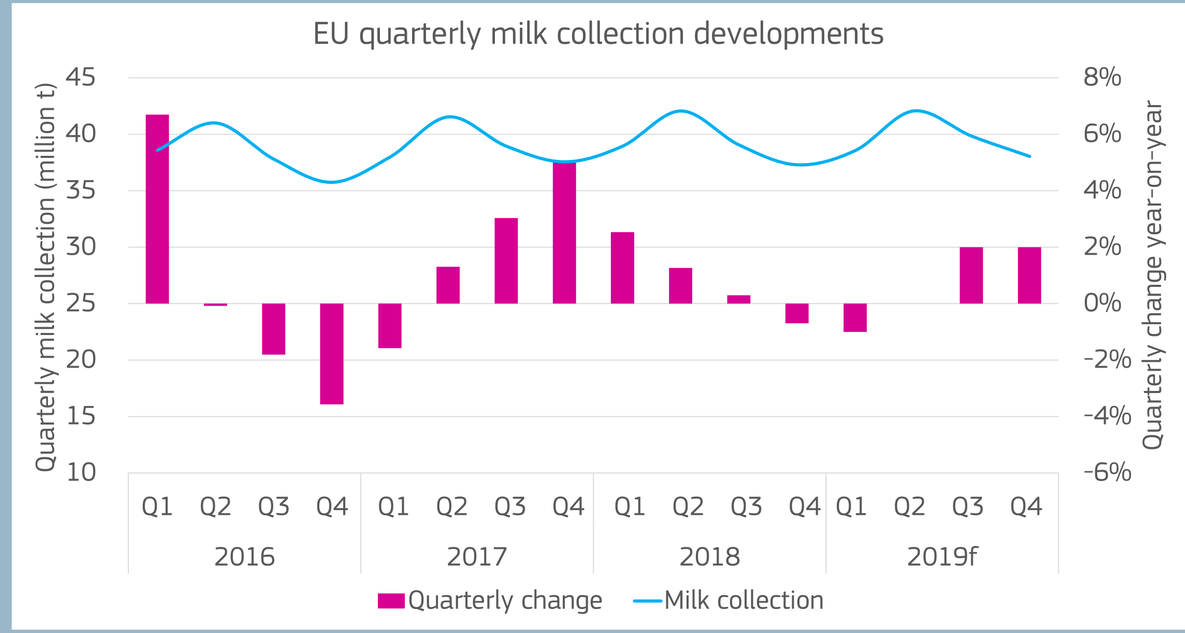
Yield gains supporting growth in 2018 EU milk deliveries



Source: DG Agriculture and Rural Development, based on Eurostat

- At the end of December 2018, the number of **dairy cows** in the EU was **1.6% below** 2017. In the same period, the number of **heifers** of 2 years **declined by 2%** indicating a likely slowdown of the replacement rate in 2019.
- Despite the impact of the drought in summer 2018 and the lower number of cows, **milk deliveries increased** in 2018 by **0.9%.** It is explained by a further **2% yield increase,** supported by the increased use of (imported) **concentrated feed** in the last quarter of 2018.

Further increase of EU milk production expected in 2019



Source: DG Agriculture and Rural Development, based on Eurostat

- The higher use of **compound feed** could limit the decline in deliveries in Q1 of 2019 (-1% year-on-year), compared to the record level of 2018.
- Over the spring 2019, and in the second half of 2019, **production is expected to increase** assuming normal weather conditions over the full year. Overall, this might lead to an **increase** of deliveries by **0.7%**.

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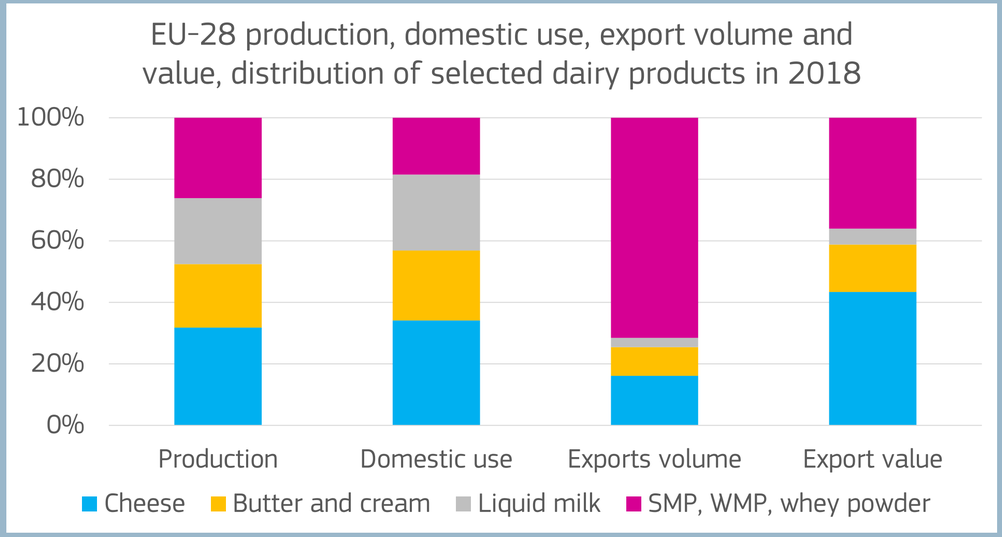
Dairy products

Note: Accounting for the trade of cheese, SMP, WMP, butter, drinking milk, cream, yogurt and whey
Source: DG Agriculture and Rural Development, based on GTA



Note: Selected dairy products cover around 75% of milk use
Source: DG Agriculture and Rural Development

EU remains the first world dairy exporter

- **In 2018, global dairy trade increased by 3%** compared to 2017. US exports grew the most (+10%, reaching 20% market share) driven by SMP (+18% in volume), with record high flows to Mexico and South-East Asia.
- The **EU** sustained its **leading market position** in 2018 (32% market share, infant formula excluded). The EU is closely followed by New Zealand.
- **The drop of US exports to China** due to increased tariffs gave more opportunity for **EU exports**, with **flows to China rising by 11%** (covering almost 25% of all Chinese imports in 2018, excluding infant formula). The increase in whey powder shipments explains 60% of such growth.
- **In 2019**, further world **import demand growth** is expected.

Sustained EU cheese production and exports growth in 2019

- **Cheese** is expected to continue offering the **best** and relatively **stable returns** to processors. It is **the first dairy product used** on the EU domestic market and its consumption is expected to keep increasing slighlty in 2019 (+0.4%).
- **Cheese** is also **the main dairy product exported in value** (infant formula excluded). In **2018,** it reached **close to 40%** of **EU dairy exports** (16% in volume). In the last 10 years, the trade value increased by almost 60%.
- In 2018, the **decline in exports to the US**, our main partner (-5%), was more than **offset by increased** shipments to **Japan (+12%)** and **Switzerland (+2%)**. With the ratified free-trade agreement with Japan, and the sustained global demand, **further growth** of **EU cheese exports** is expected in 2019 (+1%), contributing to a **production increase** of 0.8%.

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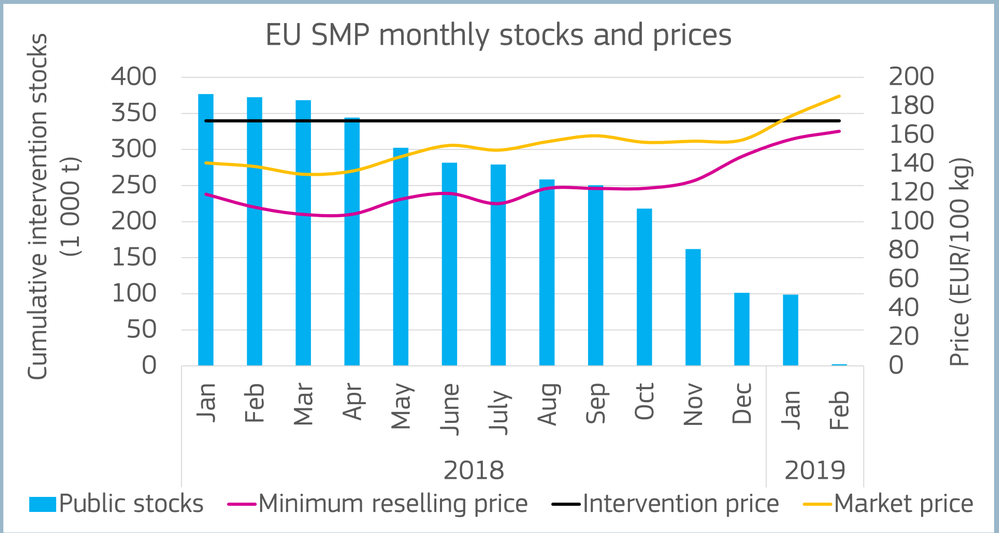
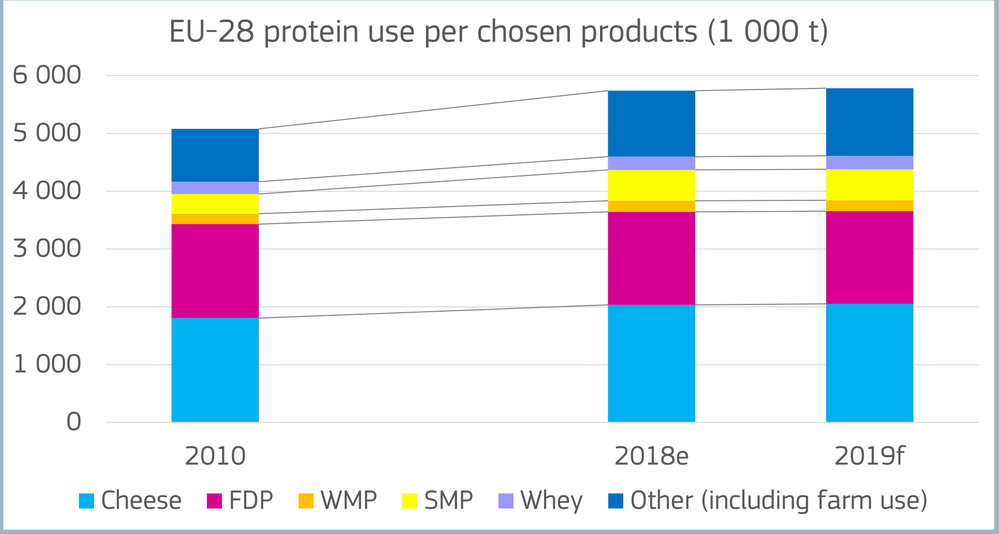
Dairy products



Source: DG Agriculture and Rural Development



Source: DG Agriculture and Rural Development

Milk price recovery supporting SMP stocks release

- By the end of February, SMP intervention stocks bought-in in 2016 and 2017 were almost empty. In parallel to the release of stock, **SMP price recovered**, reaching EUR 1 915/t at the beginning of March. This is the highest price since July 2017.
- In 2018, with more than 5% export increase, the **EU strengthened** its leading market **position in SMP trade** (38%), followed by the US (32%) and New Zealand (16%). Exports in 2018 grew the most, in percentage, to Malaysia (+45%) and China (+29%). However, in absolute volume growth was higher for shipments to China.
- Despite the expected price increase in 2019 globally, the **EU** should **remain competitive**, leading to further export growth (+3%).
- The increase in **milk fat content** and sustained internal and global demand for dairy fat are expected to lead to an EU **butter** production increase (+0.8%), and higher exports (+2%).

FFP and dairy ingredients on rise, increasing competition for WMP

- Over years, **more milk proteins** are used in the processing of **other dairy products** (not covered by statistics), for example infant formula and fat-filled powders (FFP). In 2019, the **protein use for these products** is estimated to **grow** by more than **2%**, being strongly driven by export demand (e.g. infant formula exports increased in 2018 by close to 10%).
  In addition, this trend is supported by the market development for **technical dairy ingredients** used for **adult, sport** and **senior nutrition.**
- In 2018, EU **WMP** production dropped by 5%, and exports by 15%. These trends are expected to continue in 2019. FFP and butter production offer better returns to processors than WMP (a product for which New Zealand is very competitive).

  Nevertheless, the domestic use (e.g. for chocolate) might smoothen the production decline (-2%).

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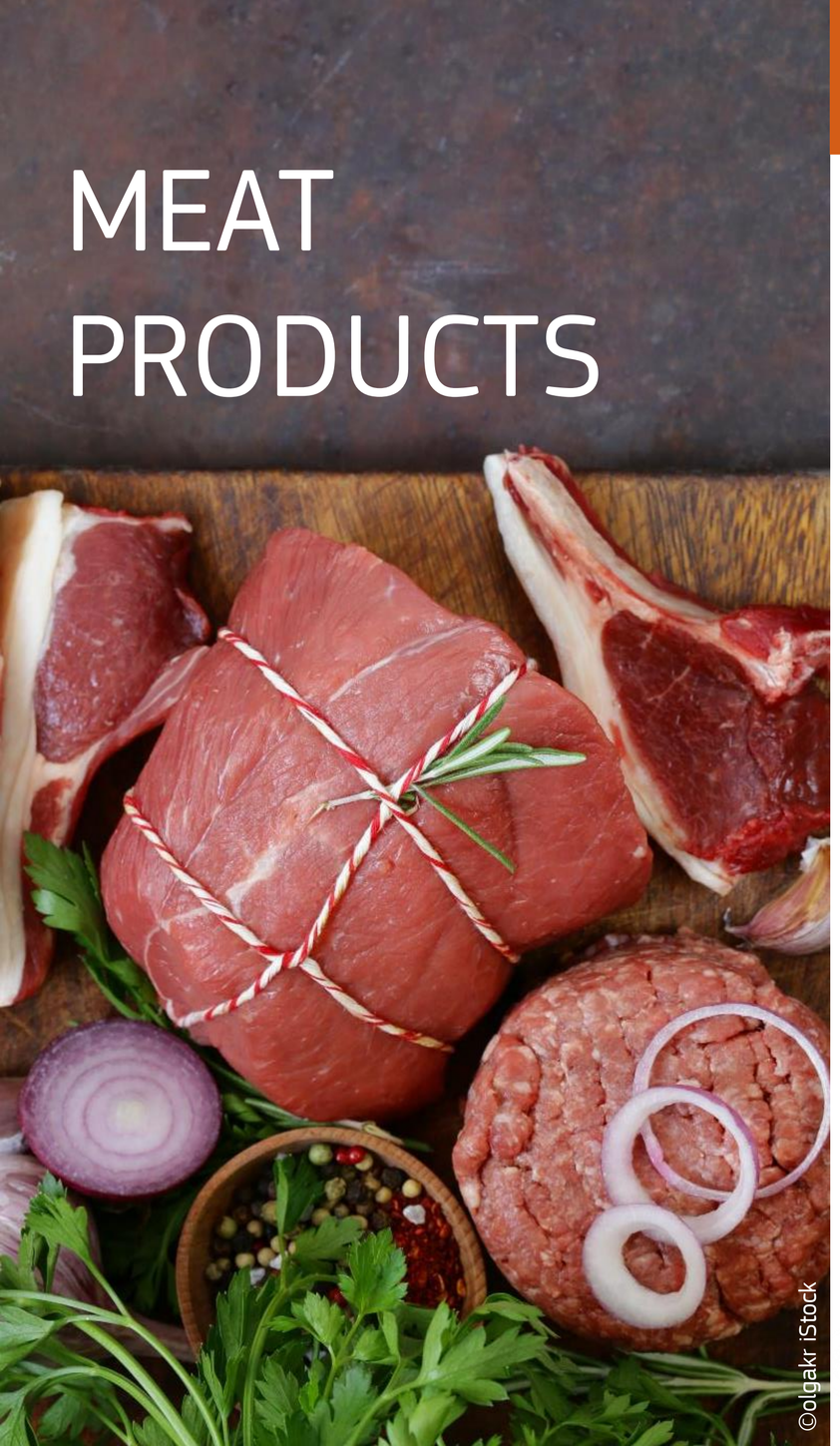
MEAT PRODUCTS



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Market developments in the EU

BEEF	2018	2019
Production	+1.8%	-1.3%
Exports	-7.5%	+3.0%
Imports	+9.4%	+4.0%
Consumption	+2.1%	-1.5%

POULTRY	2018	2019
Production	+4.7%	+2.0%
Exports	+4.0%	+2.1%
Imports	+1.6%	+3.6%
Consumption	+4.3%	+1.9%

PIGMEAT	2018	2019
Production	+2.0%	-0.0%
Exports	+4.1%	+9.0%
Consumption	+1.4%	-1.4%

SHEEP & GOAT	2018	2019
Production	-0.9%	-1.0%
Exports	-17%	+3.0%
Imports	+0.6%	-2.0%
Consumption	-0.4%	-0.5%

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

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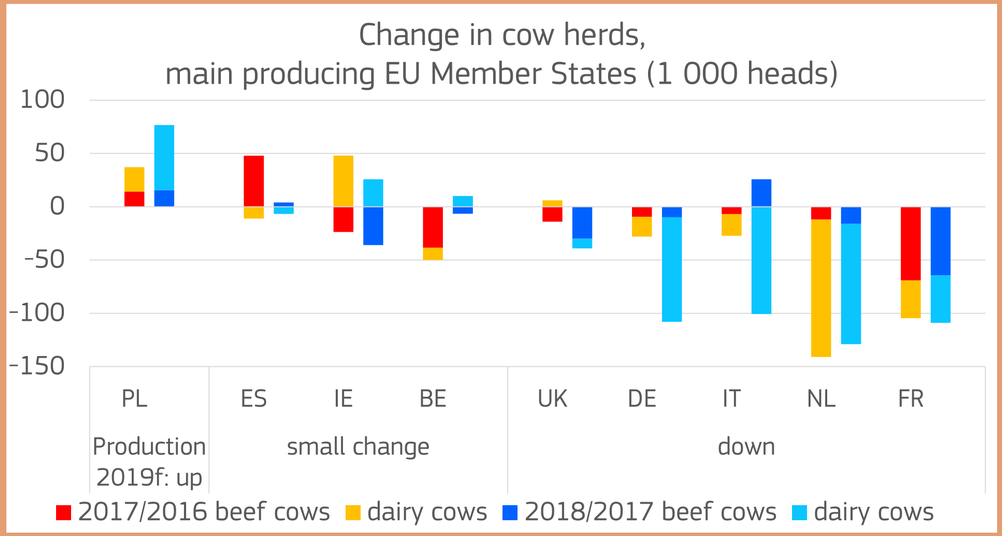
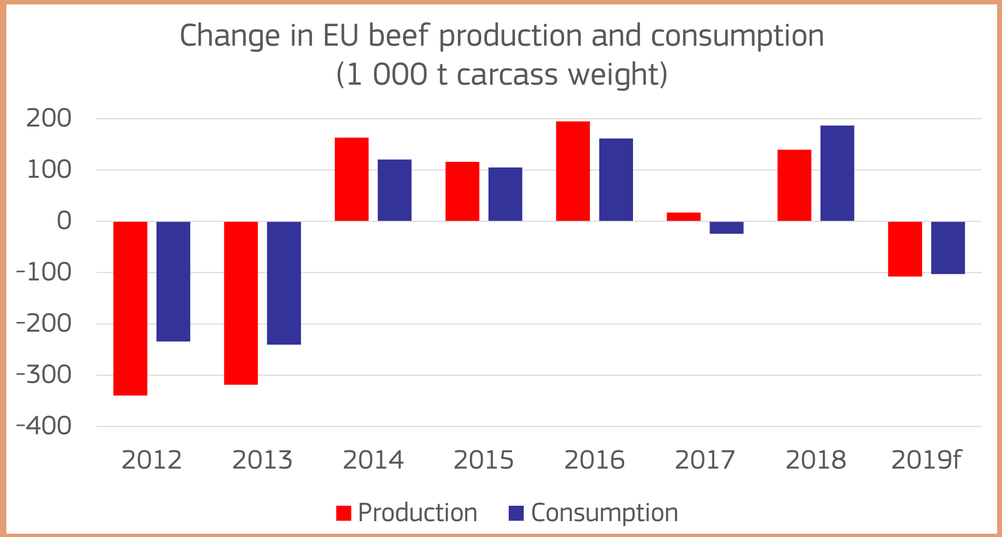
Beef and veal



Source: DG Agriculture and Rural Development based on Eurostat



Source: DG Agriculture and Rural Development based on Eurostat

EU beef production down in 2019 due to high cow slaughter last year

- **EU beef production increased more than expected in 2018** (+1.8% year-on-year). The cold winter in northern Europe and the summer drought across the EU led to a shortage of feed, low calving and early slaughter of cows.
- **EU cow herds**, on a decline since the 2015 peak, **shrank by 1.3% in 2018**: -100 000 beef cows (FR, UK and IE), and -375 000 dairy cows (NL, IT, DE and FR).
- **EU production** is expected **to decline in 2019 in the EU (-1.3%).** This is due to smaller breeding herds in 2018 in key countries as FR, NL, IT, DE, UK (with a sharp drop in beef herd in FR reflecting lower profitability and a reduction in live imports in IT). Production may not fall in IE (thanks to a higher supply of calves as live exports were low in 2018) and ES (thanks to a recovery in domestic demand). The expansion will continue in PL (pulled by the recovery of exports).
- **Increased supply in the second half of 2018 led to lower EU prices** (-5% in December year-on-year). They stabilised at the beginning of 2019. Limited supply may put upward pressure on prices in 2019.

EU beef consumption down in 2019

- The **lower domestic supply in 2019** will only be partially compensated by higher imports, while exports are expected to resume.
- This **will result in a consumption reduction in 2019** (from 11.0 kg to 10.8 kg per capita), deriving from lower meat availability (after several years of higher consumption supported by higher supply). This is another reflection of the impact of short-term supply changes on consumption development, in parallel to long-term changes in consumer preferences. Demand remains sustained in many countries while shifting always towards more processed meat and out-of-household consumption.

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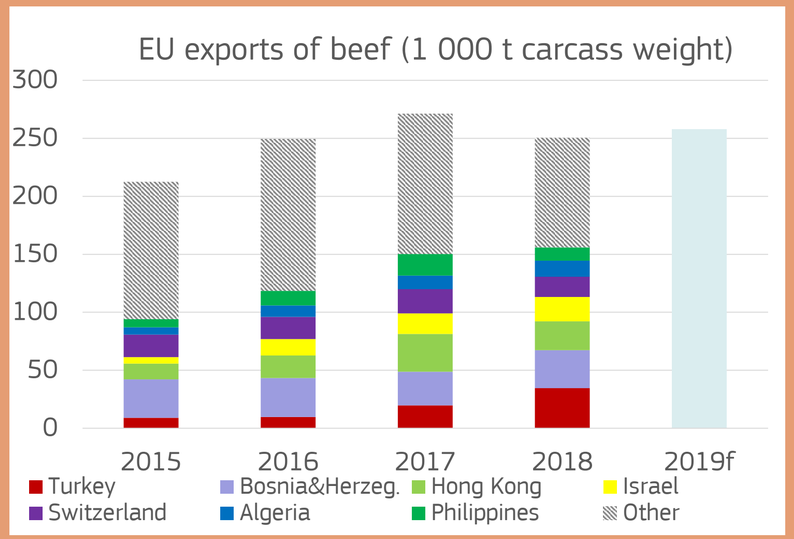
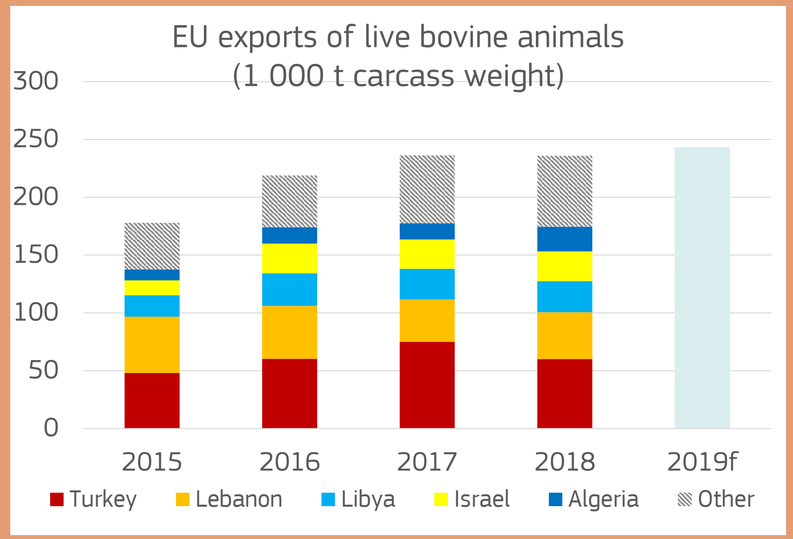
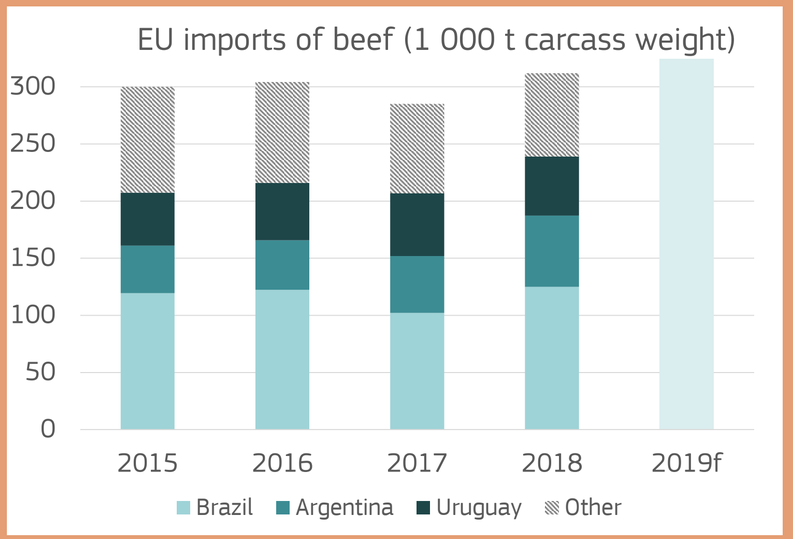
Beef and veal

Exports expected to recover with some uncertainty in key partners





Imports expected to increase



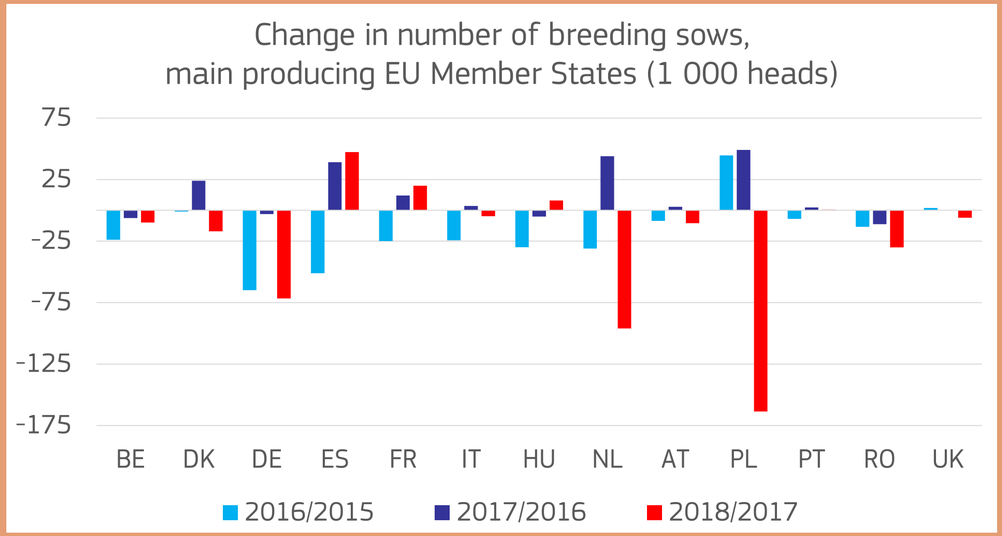
Source: DG Agriculture and Rural Development based on Eurostat

- **EU exports of beef declined in 2018** (-8%) after a record previous year, as a result of lower demand from Hong Kong and the Philippines, while meat exports to Turkey increased.
- The **slight recovery in meat exports expected in 2019** (+3%) will depend on the recovery in demand in Asia, particularly in Hong Kong.
- EU exports of live animals stagnated in 2018, with demand from Turkey declining since autumn 2018, due to the political situation and competition from Brazil and Uruguay.
  The slight increase in live exports expected in 2019 (+3%) will depend on the demand from Turkey and Lebanon, where economic prospects are uncertain.

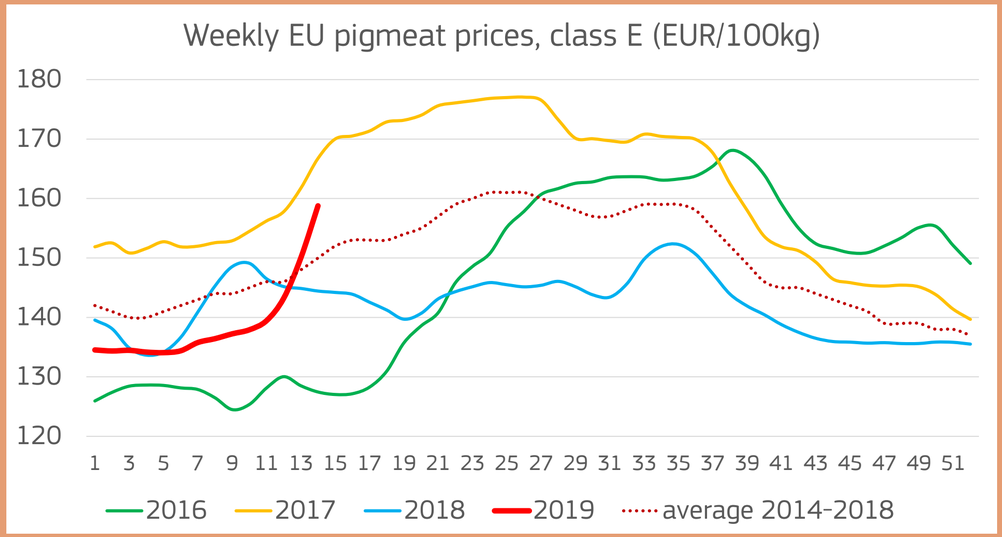
- **Imports increased in 2018** (+9%), due to a recovery in Brazil's shipments (food hygiene and compliance with EU traceability rules improved) and Argentina resuming progressively to previous levels.
- **Imports will continue to expand in 2019** (+4%), mainly from Brazil, possibly supported by a weaker Brazilian real.

European Commission

Pigmeat



Source: DG Agriculture and Rural Development based on Eurostat



Source: DG Agriculture and Rural Development

EU production expected to stabilise in 2019, despite lower herd so far

- The **EU breeding herd** is back to a **decreasing trend in 2018** (-3% year-on-year), after the expansion in 2017. There were significant herd reductions in PL (-18%), NL (-9%), DE (-4%) and RO (-9%), due to low prices, African Swine Fever (ASF) risk and/or environmental restrictions. By contrast, ES pursues the expansion of production, driven by growing extra-EU exports: the breeding herd grew by 2% and production by 5% in this Member State.
- Nevertheless, **EU production is expected to remain stable in 2019** thanks to productivity gains and expected growth in export demand. Depending on the level of the rise of China demand due to the spread of ASF, EU production could be boosted into positive growth.

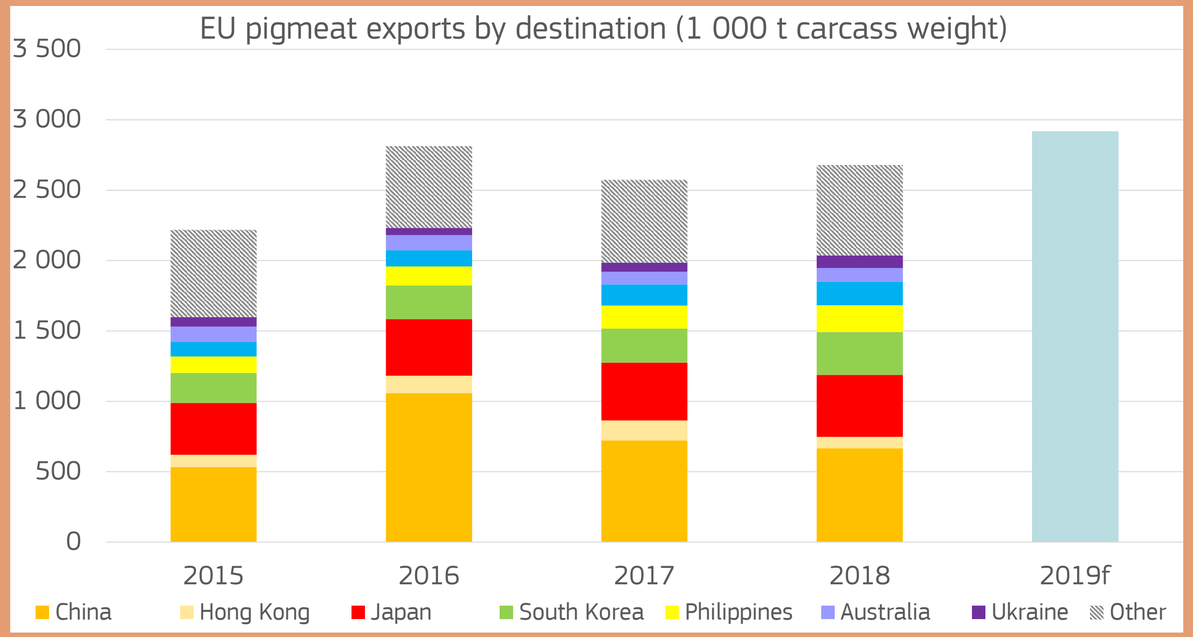
EU prices should rise in 2019, after low prices in 2018

- **Significant EU production growth in 2018** (+2%) led to pigmeat prices below the last 5-year average. Slightly higher feed prices added pressure on producer margins.
- **2019** started with similar price conditions, however **prices are rising** as supply tightens and export prospects improve, particularly towards China.
- Apparent **consumption per capita rose by 0.5 kg in 2018** (32.6 kg) supported by high availabilities. It **should readjust in 2019** as the market balances, down to 32.2 kg.

European Commission

Pigmeat

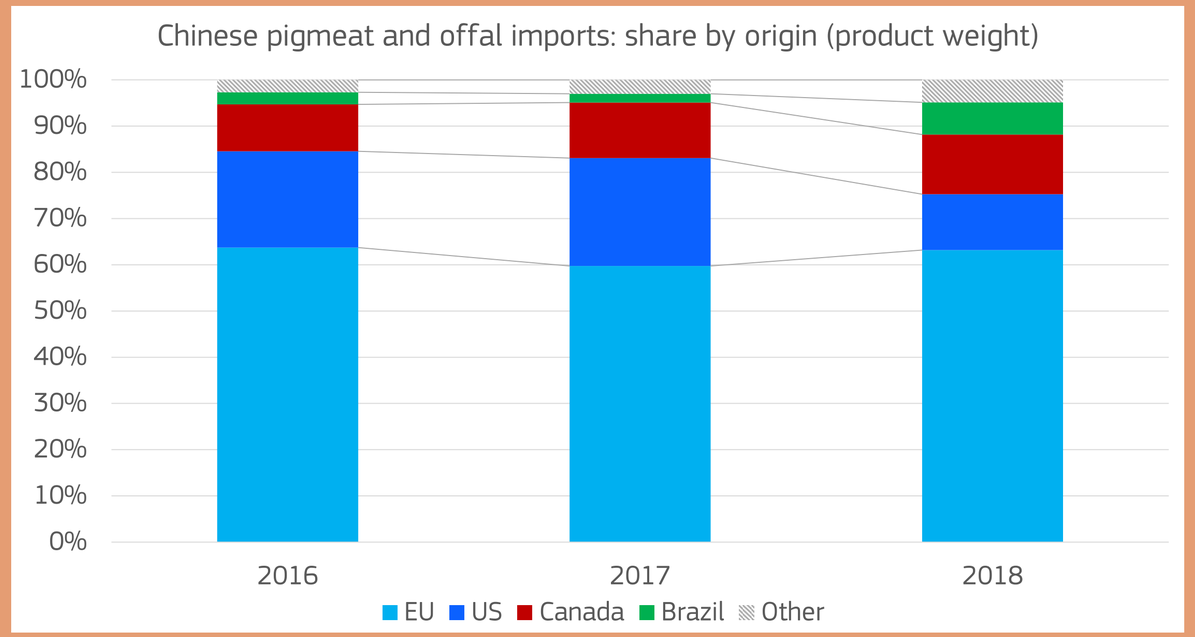
EU pigmeat exports expected to grow in 2019



Source: DG Agriculture and Rural Development based on Eurostat

- **EU pigmeat exports grew by 4% in 2018**, but fell to the main destination China (-8%) and to Hong Kong (-43%).
- **In 2019**, pigmeat exports should **grow significantly** (+9%) as **Chinese demand rises**.
- EU offal exports fell by 6% in 2018, driven by falling demand from Hong Kong (-38%). Overall volume of meat&offal exports grew by 1% but fell in value by 7% in 2018.

EU kept its share of Chinese market in 2018

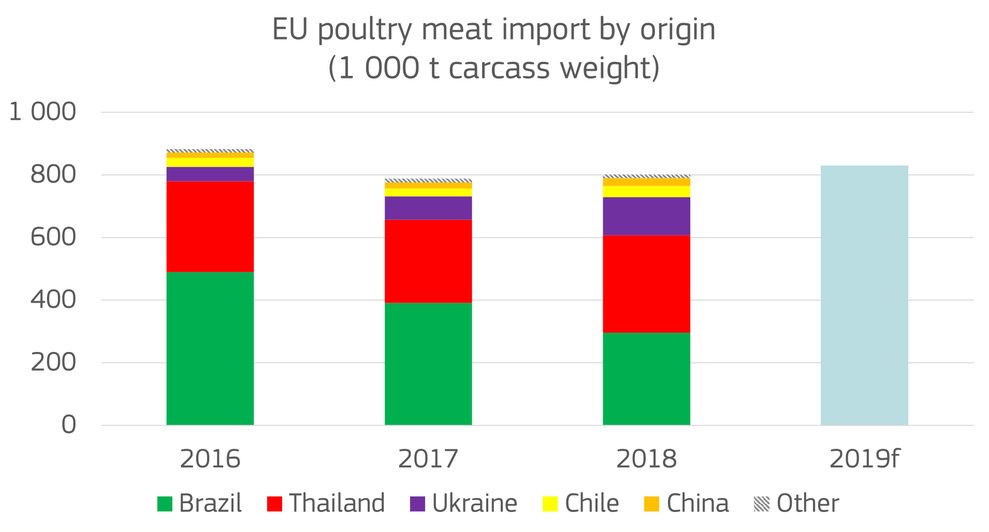


Source: DG Agriculture and Rural Development based on GTA

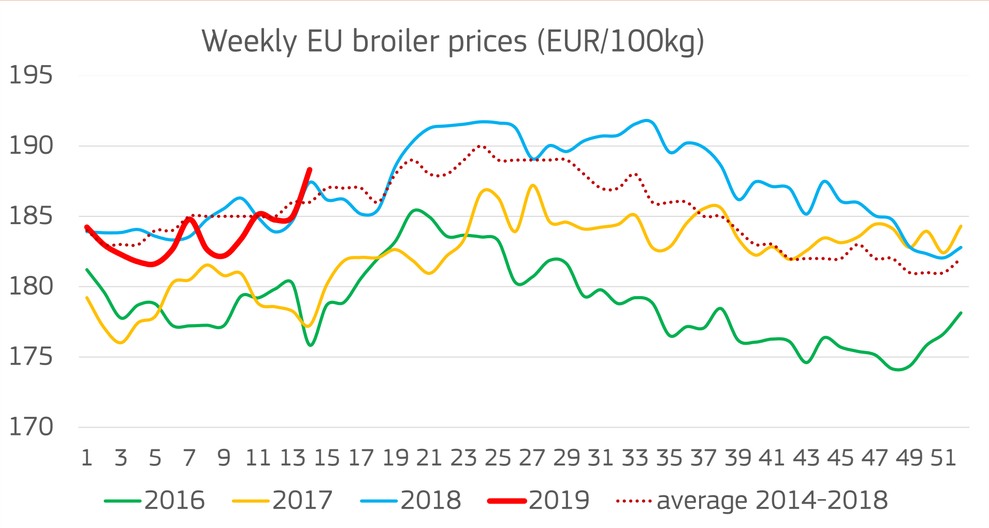
- **Chinese import demand**, the main driver of world pork trade, **fell by 13% in 2018**; the EU maintained its share above 60%.
- The closure of Russian market in 2018 pushed Brazilian exports to the Chinese market, where they rapidly increased their share. Meanwhile, the share of the US halved due to the trade frictions; it should recover if China ends its retaliatory tariffs.
- **Growth of world trade in 2019** will depend on the level of Chinese demand.

European Commission

Poultry



Source: DG Agriculture and Rural Development based on Eurostat



Source: DG Agriculture and Rural Development

EU production growth to slow down in 2019

- **EU poultry meat production rose by 5% in 2018**, favoured by the continuation of restrictions to Brazilian imports (breast preparations) that kept prices up. Production rose by more than 8% in RO, BG, PL, HU and the UK.
- In 2019, production growth is expected to slow down (+2%) as prices adjust, assuming imports from Brazil do not return to full speed yet. Production capacity is growing significantly in eastern Member States, particularly in PL.
- The **fall of imports from Brazil in 2018** (-95 000 t) was **compensated** by increased imports from **Ukraine** (+48 000 t) and **Thailand** (+45 000 t). However, the total EU import volume remained lower than in 2016. China also increased its volumes (+5 000 t) after the resolution of the WTO dispute that followed a Chinese complaint on larger market access.
- Overall, in 2018 **poultry meat imports** grew by 1.5% year-on year. They are expected **to grow by 2% in 2019** following an increased use of available quotas.

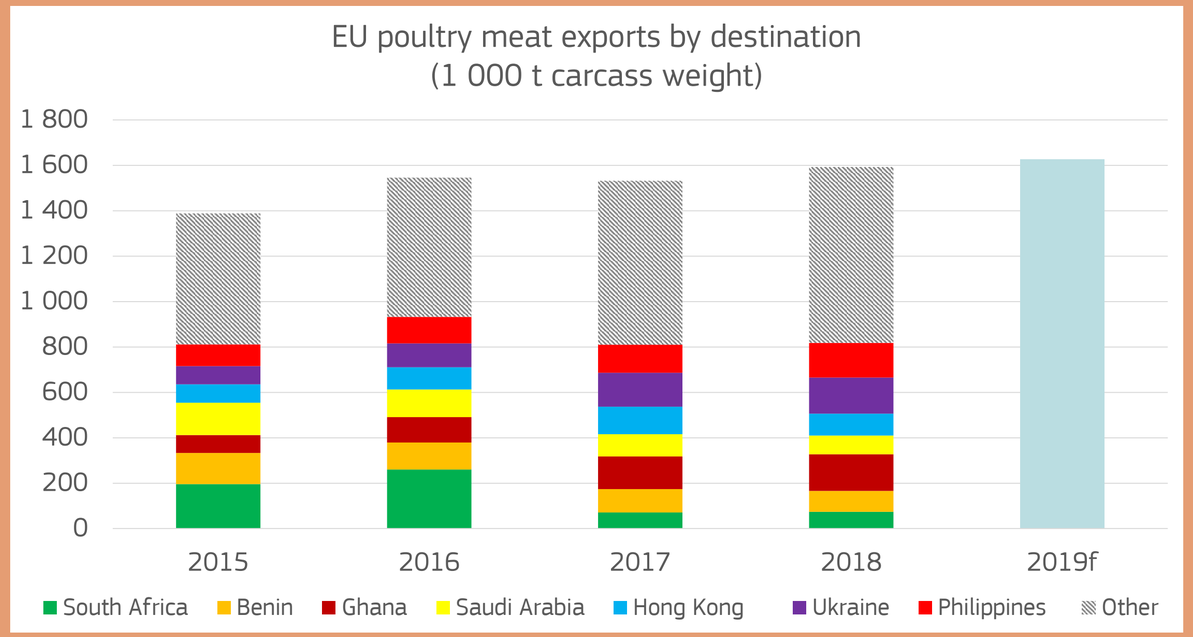
High EU prices in 2018, now under pressure

- Broiler prices were well above the last 5-year average during most of 2018. **2019 started with prices below average**, following the **increase in imports at the end of 2018**. The price evolution in 2019 will be driven by the development of imports.
- **Per capita consumption keeps growing** (+1 kg up to 24.8 kg in 2018); it is expected to grow to 25.2 kg in 2019.

European Commission

Poultry

EU exports should grow driven by higher production in 2019

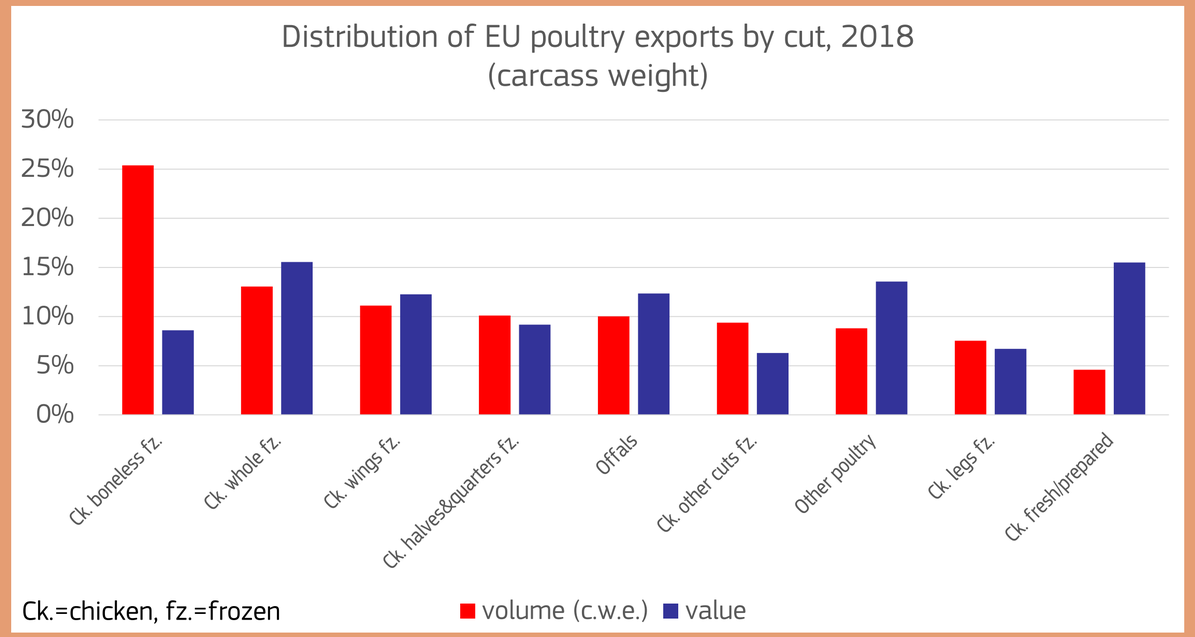


Source: DG Agriculture and Rural Development based on Eurostat

EU poultry meat exports grew by 4% in 2018 thanks to the increased production. **Growth** is expected **to moderate in 2019** (+2%).

Exports continued to show flexibility in destinations and products with falling exports to Saudi Arabia (-16%) and Hong Kong (-20%) compensated by rises to Ukraine (+6%) and most sub-Saharan countries. Exports to South Africa were still low in 2018 compared to 2015-2016.

Different cuts for different destinations



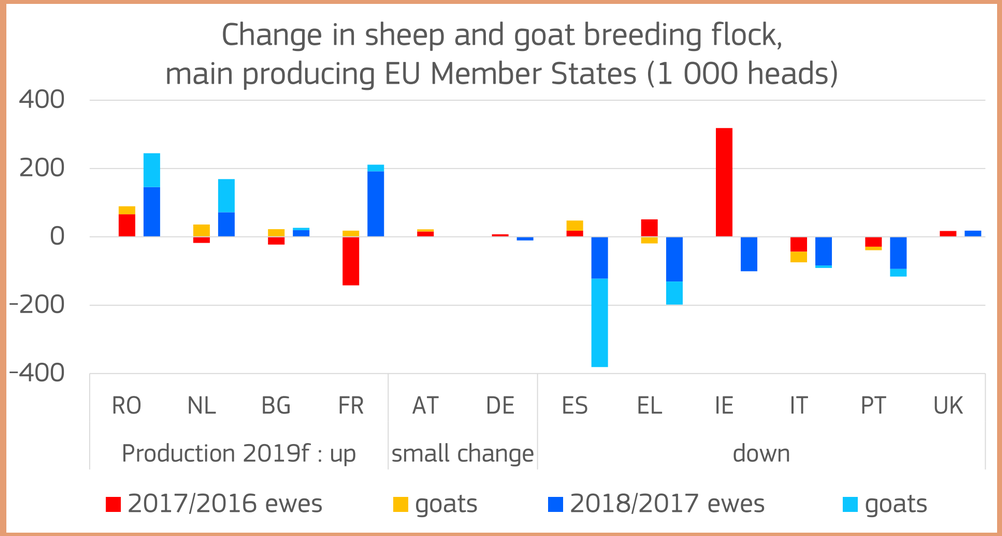
Source: DG Agriculture and Rural Development based on Eurostat

Different cuts benefit from different prices in different markets:

- Boneless chicken to Ukraine (33% share), mostly cheap meat.
- Whole chicken to Saudi Arabia (35%), mainly from France.
- Wings to Asia: Hong Kong (21%), Vietnam (9%).
- Halves & quarters to Africa: Ghana (30%), Benin (16%).
- Fresh meat and preparations to Switzerland (23%)

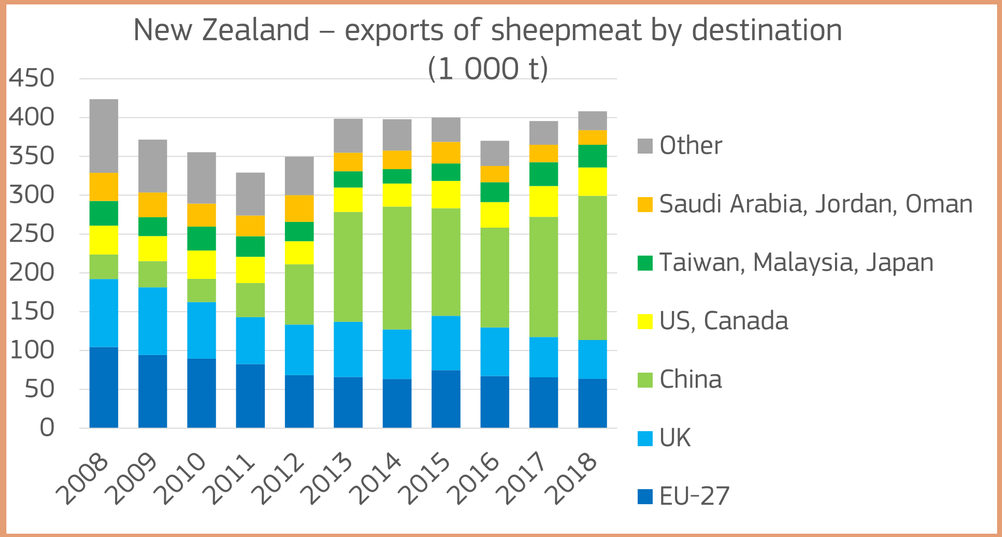
European Commission

Sheep and goatmeat



Note: Ewe & ewe-lambs put to ram, and goats mated & having already kidded

Source: DG Agriculture and Rural Development based on Eurostat



Source: DG Agriculture and Rural Development based on GTA

EU sheep and goat meat production further down in 2019

- **EU sheep and goat meat production decreased in 2018** (-1%). The cold winter and spring have led to lower lambing rates in northern Europe and the summer drought throughout the EU led to a shortage of forage, with consequent early slaughter at a lower carcass weight.
- Therefore, the **EU sheep and goat flock decreased in 2018** (-1%), with breeding herds falling in the main producing countries (ES, EL, IE, IT and PT).
- **EU production is expected to decline further in 2019** (-1%), reflecting smaller (breeding) flocks in the main producing countries.
- **EU prices** were high in 2018 due to low meat availability and favourable world demand. They **may remain high in 2019** due to a further supply decline. At the beginning of 2019 (7th week), prices were lower than in 2018 for heavy lambs (-4.3%) and similar for light lambs.

Lower availability of sheepmeat from New Zealand

- EU sheepmeat imports, dominated by New Zealand (85%), were stable in 2018.
- Since 2012, New Zealand has focused more on Asian markets, in particular China. **The share of China in New Zealand exports increased to 26%, while the share of the EU almost halved during past 10 years to 16%.**
- In case of no disturbances in trade flows, slightly lower EU imports are expected in 2019, with lower New Zealand shipments to the EU. This may contribute to a decline of sheepmeat consumption in the EU (from 2.3 to 2.2 kg per capita).

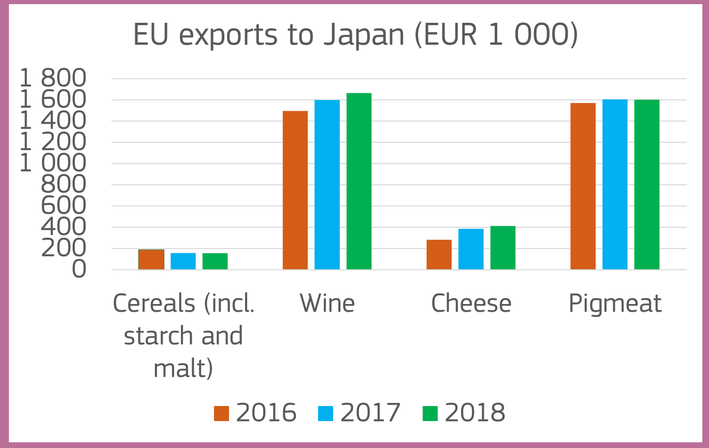
European Commission

EPA EU–JAPAN

Opportunities rise in the East…

- Agri-food exports to Japan: **EUR 5.7 billion/year**. Japan is a high-value market and the **4th biggest** for the EU.
- European partnership agreement (EPA) entered into force on **01/02/2019**.
- **87%** of EU agri-food trade value (2014-2016) will be **liberalised over time**.
- **Wine**: full liberalisation at entry into force.
- **Pigmeat**: almost free trade in 10 years.
- **Beef**: drastic tariff reduction over 15 years with very high safeguard level, possibly eliminated after 15 years.
- **Cheese**: liberalisation of hard cheeses in 15 years, TRQ (duty free) for other cheeses of significant volume and unlimited increase.
- More than **200 EU GIs** protected.
- For more details: http://ec.europa.eu/trade/policy/in-focus/eu-japan-economic-partnership-agreement/

Product	Before EPA	EPA Tariff	EPA Safeguard/ TRQ	Transition
Wine	14%-40% (ad-valorem equivalent)	Free trade		No transition
Beef	38.5%	9%	43 500 t to 50 500 t	15 years
Pigmeat	4.3%	Almost free trade	Temporary safeguard	10 years
Hard cheese	29.8%	Free trade		15 years
Other cheeses	22.4%-40%	0% within TRQ	TRQ: 20 000 t to 31 000 t	15 years



Source: DG Agriculture and Rural development, based on Eurostat

European Commission

ARABLE CROPS

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

	EU-28					% variation			
	2015	2016	2017	2018e	2019f	18/17	18 vs 5-year av.*	19/18	19 vs 5-year av.*
Common wheat	24 325	24 250	23 386	23 065	23 714	-1.4	-3.9	2.8	-1.1
Durum	2 436	2 773	2 545	2 475	2 417	-2.8	0.7	-2.3	-2.8
Rye	1 964	1 923	1 960	1 948	2 038	-0.6	-4.0	4.6	4.1
Barley	12 219	12 302	12 040	12 277	12 291	2.0	-0.2	0.1	0.2
Oats	2 526	2 611	2 684	2 742	2 654	2.1	5.1	-3.2	1.5
Maize	9 256	8 563	8 276	8 293	8 693	0.2	-9.3	4.8	-0.1
Triticale	3 117	2 913	2 760	2 630	2 536	-4.7	-8.5	-3.6	-11.8
Sorghum	139	123	136	152	140	11.5	8.5	-7.9	-1.6
Others	1 297	1 320	1 423	1 536	1 358	7.9	12.8	-11.6	-0.2
Cereals	**57 279**	**56 778**	**55 210**	**55 118**	**55 842**	**-0.2**	**-3.7**	**1.3**	**-1.0**
Rapeseed	6 467	6 535	6 749	6 961	6 235	3.1	4.6	-10.4	-6.5
Sunflower	4 197	4 138	4 312	4 147	4 177	-3.8	-2.6	0.7	-0.6
Soya beans	893	832	962	975	976	1.3	27.5	0.1	8.9
Linseed	66	84	80	68	70	-14.6	-2.3	3.1	-1.2
Oilseeds	**11 623**	**11 588**	**12 103**	**12 151**	**11 459**	**0.4**	**3.9**	**-5.7**	**-2.7**
Field peas	744	913	1 032	898	899	-13.0	23.1	0.1	5.5
Broad beans	624	655	697	639	639	-8.4	14.5	0.1	0.0
Lupines	258	180	165	127	153	-22.9	-17.6	20.0	-3.0
Protein crops	**1 626**	**1 748**	**1 894**	**1 664**	**1 691**	**-12.1**	**13.0**	**1.6**	**0.7**
Sugar beet	1 420	1 498	1 756	1 735	1 673	-1.2	10.5	-3.6	3.1
Total	**71 948**	**71 612**	**70 963**	**70 668**	**70 664**	**-0.4**	**-1.6**	**0.0**	**-1.2**

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

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

	EU-28					% variation			
	2015	2016	2017	2018e	2019f	18/17	18 vs 5-year av.*	19/18	19 vs 5-year av.*
Common wheat	6.3	5.6	6.1	5.6	5.9	-8.1	-6.6	5.2	-0.7
Durum	3.4	3.5	3.5	3.5	3.4	2.2	3.4	-3.1	-1.1
Rye	4.0	3.9	3.8	3.2	4.2	-14.1	-17.5	29.3	8.2
Barley	5.1	4.9	4.9	4.6	4.9	-5.6	-5.9	6.9	1.0
Oats	3.0	3.1	3.1	2.8	3.0	-7.8	-8.4	6.4	-1.4
Maize	6.4	7.4	7.9	8.4	7.3	6.3	13.6	-13.0	-6.5
Triticale	4.1	4.1	4.2	3.8	4.8	-10.6	-9.5	25.6	15.0
Sorghum	5.2	5.4	5.3	5.6	5.0	5.2	4.9	-9.5	-7.3
Others	2.7	2.7	2.9	2.4	2.9	-16.9	-13.2	16.9	3.0
Cereals	**5.5**	**5.3**	**5.6**	**5.3**	**5.5**	**-4.7**	**-2.8**	**3.4**	**0.7**
Rapeseed	3.4	3.1	3.3	2.9	3.2	-12.5	-12.3	11.6	-1.6
Sunflower	1.9	2.1	2.4	2.5	2.4	2.1	17.5	-2.1	8.1
Soya beans	2.7	3.0	2.8	2.9	2.9	6.0	4.9	-0.2	1.3
Linseed	1.9	1.8	1.9	2.0	2.0	4.1	0.9	0.5	2.9
Oilseeds	**2.8**	**2.7**	**2.9**	**2.7**	**2.9**	**-6.5**	**-2.7**	**5.6**	**2.6**
Field peas	2.8	2.5	2.7	2.2	2.5	-16.9	-17.1	13.6	-3.1
Broad beans	3.1	2.9	3.1	2.5	3.0	-18.7	-17.3	17.1	-3.1
Lupines	1.4	1.7	1.6	1.4	1.5	-13.5	-14.5	11.9	-0.6
Protein crops	**2.7**	**2.6**	**2.7**	**2.3**	**2.6**	**-17.0**	**-15.7**	**14.3**	**-2.6**
Sugar beet	71.8	75.0	81.5	65.5	73.9	-19.6	-13.4	12.7	-2.4

ARABLE CROPS

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

	EU-28					% variation			
	2015	2016	2017	2018e	2019f	18/17	18 vs 5-year av.*	19/18	19 vs 5-year av.*
Common wheat	152 516	134 963	143 143	129 745	140 288	-9.4	-9.3	8.1	-1.6
Durum	8 389	9 674	8 810	8 756	8 282	-0.6	4.1	-5.4	-4.3
Rye	7 796	7 406	7 373	6 296	8 519	-14.6	-22.1	35.3	13.2
Barley	61 931	59 974	58 810	56 626	60 601	-3.7	-6.6	7.0	1.3
Oats	7 585	8 138	8 197	7 717	7 944	-5.9	-3.9	2.9	0.9
Maize	59 287	63 085	65 071	69 343	63 244	6.6	6.6	-8.8	-3.9
Triticale	12 785	11 829	11 691	9 956	12 059	-14.8	-17.7	21.1	-0.4
Sorghum	720	669	722	847	706	17.3	17.1	-16.6	-7.4
Others	3 453	3 584	4 182	3 752	3 880	-10.3	-3.3	3.4	2.7
Cereals	**314 461**	**299 322**	**307 997**	**293 037**	**307 121**	**-4.9**	**-5.5**	**4.8**	**0.0**
Rapeseed	21 814	20 102	22 020	19 864	19 859	-9.8	-8.1	0.0	-6.8
Sunflower	7 882	8 739	10 403	10 219	10 080	-1.8	12.4	-1.4	7.1
Soya beans	2 371	2 480	2 672	2 867	2 865	7.3	28.6	-0.1	14.3
Linseed	128	147	154	137	142	-11.1	0.7	3.6	3.6
Oilseeds	**32 195**	**31 467**	**35 249**	**33 087**	**32 946**	**-6.1**	**0.2**	**-0.4**	**-1.7**
Field peas	2 077	2 315	2 766	2 001	2 276	-27.6	3.8	13.7	6.8
Broad beans	1 962	1 922	2 173	1 619	1 898	-25.5	-5.4	17.3	3.5
Lupines	364	297	263	176	236	-33.3	-31.6	34.3	-8.1
Protein crops	**4 402**	**4 534**	**5 202**	**3 795**	**4 410**	**-27.0**	**-3.4**	**16.2**	**3.9**
Sugar beet	101 900	112 400	143 100	113 700	123 600	-20.5	-3.2	8.7	3.8

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

	EU-28					% variation
	2015/16	2016/17	2017/18e	2018/19f	2019/20f	19/20 vs 18/19
Beginning stocks	46.2	43.6	37.1	47.3	48.4	2.1
Gross production	*314.5*	*299.3*	*308.0*	*293.0*	*310.2*	*5.9*
Usable production	311.7	296.7	305.3	290.5	307.5	5.8
Imports	20.8	19.3	24.5	27.9	21.3	-23.5
Availabilities	**378.7**	**359.6**	**366.9**	**365.7**	**377.2**	*3.1*
Total domestic uses	282.1	282.1	283.8	285.2	284.5	-0.3
- Human	65.1	65.4	65.7	65.8	65.8	0.0
- Seed	9.6	9.6	9.3	9.2	9.2	0.0
- Industrial	34.0	34.2	34.8	34.7	34.7	0.0
o.w. bioethanol	*12.0*	*12.2*	*12.6*	*12.6*	*13.0*	*2.5*
- Animal feed	173.4	172.9	174.1	175.5	174.7	-0.4
Losses (excl on-farm)	2.2	2.2	2.2	2.2	2.2	0.0
Exports	50.8	38.2	33.5	29.9	38.4	28.4
Total uses	**335.1**	**322.5**	**319.6**	**317.4**	**325.1**	**2.4**
End stocks	**43.6**	**37.1**	**47.3**	**48.4**	**52.1**	*7.7*
- Market	43.6	37.1	47.3	48.4	52.1	*7.7*
- Intervention	0.0	0.0	0.0	0.0	0.0	*0.0*
Self-sufficiency rate %	**110.5**	**105.2**	**107.6**	**101.9**	**108.1**	*0.0*

ARABLE CROPS

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

	Common wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others
Beginning stocks (01.07.2019)	12.3	6.1	1.7	25.9	0.4	0.7	0.1	1.0	0.2
Gross production	141.3	60.8	8.3	68.7	8.0	0.8	8.0	10.6	3.6
Usable production	140.2	60.3	8.3	68.4	7.9	0.7	7.9	10.4	3.5
Import[1]	3.4	0.2	1.7	15.5	0.1	0.3	0.0	0.0	0.2
Total availabilities	**155.8**	**66.7**	**11.6**	**109.8**	**8.4**	**1.7**	**8.1**	**11.4**	**3.8**
Total domestic use	118.1	46.6	9.6	81.7	6.5	0.9	7.7	9.8	3.7
- Human	48.1	0.4	8.1	4.9	3.0	0.2	1.2	0.1	0.0
- Seed	4.8	2.1	0.5	0.4	0.4	0.0	0.4	0.5	0.1
- Industrial	11.2	9.1	0.1	12.4	1.3	0.0	0.1	0.4	0.1
o.w. bioethanol	*4.7*	*0.4*	*0.0*	*6.8*	*0.7*	*0.0*	*0.0*	*0.3*	*0.0*
- Animal feed	54.0	35.0	1.0	64.0	1.8	0.7	6.0	8.8	3.5
Losses (excl on-farm)	0.9	0.4	0.0	0.6	0.1	0.0	0.1	0.1	0.0
Export[1]	25.5	8.8	1.1	2.6	0.2	0.0	0.2	0.0	0.0
Total use	**144.5**	**55.8**	**10.8**	**84.9**	**6.7**	**0.9**	**7.9**	**9.9**	**3.7**
End stocks (30.06.2019)	11.3	10.9	0.8	24.9	1.6	0.8	0.1	1.5	0.1
- Market	11.3	10.9	0.8	24.9	1.6	0.8	0.1	1.5	0.1
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Change in stocks	-0.9	4.8	-0.8	-1.0	1.2	0.1	0.0	0.5	-0.1
Change in public stocks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate %	**118.7**	**129.5**	**85.7**	**83.7**	**120.7**	**84.3**	**103.8**	**106.1**	**93.9**

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

	Common wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others
Beginning stocks (01.07.2018)	17.2	4.2	2.4	20.2	0.6	0.4	0.4	1.1	0.9
Gross production	129.7	56.6	8.8	69.3	6.3	0.8	7.7	10.0	3.8
Usable production	128.7	56.1	8.7	69.1	6.2	0.8	7.6	9.8	3.6
Import[1]	4.3	0.2	1.3	21.0	0.5	0.4	0.0	0.0	0.2
Total availabilities	**150.2**	**60.6**	**12.3**	**110.2**	**7.2**	**1.6**	**8.0**	**10.9**	**4.7**
Total domestic use	118.1	46.6	9.6	81.7	6.5	0.9	7.7	9.8	4.4
- Human	48.1	0.4	8.1	4.9	3.0	0.2	1.2	0.1	0.0
- Seed	4.8	2.1	0.5	0.4	0.4	0.0	0.4	0.5	0.1
- Industrial	11.2	9.1	0.1	12.4	1.3	0.0	0.1	0.4	0.1
o.w. bioethanol	*4.7*	*0.4*	*0.0*	*6.5*	*0.7*	*0.0*	*0.0*	*0.3*	*0.0*
- Animal feed	54.0	35.0	1.0	64.0	1.8	0.7	6.0	8.8	4.3
Losses (excl on-farm)	0.9	0.4	0.0	0.6	0.1	0.0	0.1	0.1	0.0
Export[1]	19.0	7.5	1.0	2.0	0.2	0.0	0.2	0.0	0.0
Total use	**138.0**	**54.5**	**10.7**	**84.3**	**6.8**	**0.9**	**7.9**	**9.9**	**4.5**
End stocks (30.06.2018)	12.3	6.1	1.7	25.9	0.4	0.7	0.1	1.0	0.2
- Market	12.3	6.1	1.7	25.9	0.4	0.7	0.1	1.0	0.2
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Change in stocks	-4.9	1.9	-0.7	5.8	-0.1	0.3	-0.3	-0.1	-0.8
Change in public stocks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate %	**109.0**	**120.6**	**90.0**	**84.5**	**94.7**	**92.0**	**99.7**	**99.6**	**80.4**

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

	Common wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others
Beginning stocks (01.07.2017)	9.2	5.7	2.9	14.5	0.7	0.1	0.5	1.7	1.5
Gross production	143.1	58.8	8.8	65.1	7.4	0.7	8.2	11.7	4.2
Usable production	142.0	58.3	8.7	64.8	7.2	0.7	8.1	11.5	4.0
Import[1]	4.0	0.5	1.5	17.9	0.1	0.4	0.0	0.0	0.2
Total availabilities	**155.6**	**64.4**	**13.1**	**97.2**	**8.0**	**1.2**	**8.6**	**13.1**	**5.7**
Total domestic use	116.1	50.9	9.6	74.6	7.2	0.9	7.9	11.9	4.7
- Human	48.0	0.4	8.0	4.9	3.1	0.2	1.1	0.1	0.0
- Seed	4.8	2.1	0.5	0.4	0.4	0.0	0.4	0.5	0.1
- Industrial	11.2	9.1	0.1	12.1	1.7	0.0	0.1	0.4	0.1
o.w. bioethanol	*4.7*	*0.4*	*0.0*	*6.2*	*1.0*	*0.0*	*0.0*	*0.3*	*0.0*
- Animal feed	52.2	39.3	1.0	57.2	2.1	0.7	6.2	10.9	4.5
Losses (excl on-farm)	0.9	0.4	0.0	0.6	0.1	0.0	0.1	0.1	0.0
Export[1]	21.3	9.0	1.1	1.8	0.1	0.0	0.2	0.0	0.0
Total use	**138.3**	**60.2**	**10.8**	**77.1**	**7.4**	**0.9**	**8.2**	**12.0**	**4.7**
End stocks (30.06.2017)	17.2	4.2	2.4	20.2	0.6	0.4	0.4	1.1	0.9
- Market	17.2	4.2	2.4	20.2	0.6	0.4	0.4	1.1	0.9
- Intervention	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	-0.5	5.6	-0.1	0.2	-0.1	-0.6	-0.6
Change in public stocks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate %	**122.3**	**114.6**	**90.8**	**86.8**	**99.8**	**78.4**	**102.6**	**96.0**	**84.9**

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

	EU-28					% variation			
	2015/16	2016/17	2017/18e	2018/19f	2019/20f	18/19 vs 17/18	% 5-yr.av.	19/20 vs 18/19	% 5-yr.av.
Production	**32.1**	**31.3**	**35.1**	**77.5**	**47.6**	**120.9**	**135.8**	**-38.6**	**39.4**
Rapeseed	21.8	20.1	22.0	64.4	34.7	192.7	198.3	-46.2	52.8
Soya beans	2.4	2.5	2.7	2.9	2.9	7.3	28.6	-0.1	14.3
Sunflower	7.9	8.7	10.4	10.2	10.1	-1.8	12.4	-1.3	7.2
Total domestic use	**50.0**	**49.6**	**52.5**	**97.5**	**66.1**	**85.5**	**96.4**	**-32.1**	**30.4**
Rapeseed	24.9	24.1	25.9	68.9	38.3	166.6	176.0	-44.4	50.0
of which crushing	24.1	23.3	24.9	66.5	37.0	166.6	175.4	-44.4	49.9
Soya beans	17.1	16.5	16.4	18.2	17.7	11.2	14.9	-2.7	6.5
of which crushing	15.2	14.7	14.6	16.3	15.2	11.2	14.6	-6.4	2.5
Sunflower	8.1	9.0	10.3	10.3	10.1	0.2	15.6	-2.2	7.0
of which crushing	7.0	8.0	9.2	9.2	8.3	0.2	16.4	-9.3	0.0
Imports	**18.7**	**19.1**	**18.6**	**20.6**	**19.4**	**10.8**	**12.8**	**-5.9**	**3.2**
Rapeseed	3.5	4.2	4.0	4.6	3.9	15.0	25.3	-15.1	0.0
Soya beans	14.8	14.1	14.1	15.5	15.0	9.9	11.4	-3.2	4.8
Sunflower	0.5	0.8	0.5	0.5	0.5	0.0	14.6	-2.3	0.0
Exports	**0.9**	**0.9**	**1.0**	**0.7**	**0.9**	**-33.3**	**-32.0**	**30.7**	**-4.4**
Rapeseed	0.3	0.3	0.1	0.1	0.3	-25.9	-68.4	164.3	0.0
Soya beans	0.1	0.2	0.3	0.2	0.2	-36.6	24.1	-6.4	0.0
Sunflower	0.4	0.4	0.6	0.4	0.5	-33.3	-24.0	14.9	0.0
End stocks	**3.1**	**2.9**	**3.0**	**3.0**	**3.0**	**-1.2**	**0.0**	**-0.5**	**-1.5**
Rapeseed	1.1	1.0	1.1	1.1	1.1	0.3	1.6	-1.1	-0.5
Soya beans	1.4	1.2	1.3	1.3	1.3	-2.0	0.0	-1.4	-3.4
Sunflower	0.6	0.7	0.7	0.6	0.7	-2.3	-4.9	2.1	0.0
Self-sufficiency rate %	**64.1**	**63.2**	**66.8**	**79.5**	**72.0**				

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

	EU-28					% variation			
	2015/16	2016/17	2017/18e	2018/19f	2019/20f	18/19 vs 17/18	% 5-yr.av.	19/20 vs 18/19	% 5-yr.av.
Production	**29.6**	**29.3**	**30.8**	**55.8**	**37.7**	**81.1**	**91.0**	**-32.4**	**26.1**
Rapeseed	13.7	13.3	14.2	37.9	21.1	166.6	175.4	-44.4	49.9
Soya beans	12.0	11.6	11.5	12.8	12.0	11.2	14.6	-6.4	2.5
Sunflower	3.8	4.4	5.0	5.1	4.6	0.2	16.4	-9.3	0.0
Total domestic use	**52.4**	**50.4**	**52.2**	**77.3**	**59.1**	**48.0**	**51.9**	**-23.5**	**14.4**
Rapeseed	13.7	13.0	13.9	38.0	21.0	172.5	177.7	-44.7	50.4
Soya beans	31.9	29.7	29.9	31.1	30.4	4.0	5.8	-2.4	0.4
Sunflower	6.8	7.8	8.3	8.2	7.7	-2.2	9.8	-5.2	-0.1
Imports	**23.8**	**22.2**	**22.7**	**22.6**	**22.5**	**-0.4**	**1.0**	**-0.5**	**-0.1**
Rapeseed	0.4	0.2	0.2	0.5	0.4	177.8	38.9	-28.0	0.0
Soya beans	20.2	18.3	18.8	18.7	18.7	-0.5	0.4	0.0	0.0
Sunflower	3.2	3.7	3.7	3.4	3.4	-8.1	1.0	0.8	0.0
Exports	**1.0**	**1.1**	**1.3**	**1.1**	**1.1**	**-12.6**	**6.9**	**-2.5**	**1.3**
Rapeseed	0.5	0.5	0.5	0.4	0.4	-11.1	-10.0	11.1	0.0
Soya beans	0.3	0.3	0.4	0.4	0.3	0.0	25.9	-14.4	0.0
Sunflower	0.2	0.3	0.4	0.3	0.3	-26.9	14.2	-4.7	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 %	**100.4**	**102.3**	**101.9**	**99.7**	**100.4**				

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

	EU-28					% variation			
	2015/16	2016/17	2017/18e	2018/19f	2019/20f	18/19 vs 17/18	% 5-yr.av.	19/20 vs 18/19	% 5-yr.av.
Production	**15.8**	**15.8**	**17.0**	**34.4**	**21.7**	**102.2**	**115.6**	**-36.8**	**33.0**
Rapeseed	9.9	9.5	10.2	27.3	15.2	166.6	175.4	-44.4	49.9
Soya beans	3.0	2.9	2.9	3.3	3.0	11.2	14.6	-6.4	2.5
Sunflower	2.9	3.3	3.9	3.9	3.5	0.2	16.4	-9.3	0.0
Palm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total domestic use	**23.1**	**22.8**	**24.6**	**41.6**	**28.9**	**69.0**	**81.7**	**-30.6**	**22.8**
Rapeseed	9.7	9.3	10.1	27.2	15.0	169.8	179.6	-44.8	50.1
Soya beans	2.4	2.3	2.5	2.7	2.4	8.2	15.9	-8.6	1.2
Sunflower	3.9	4.5	5.1	4.9	4.6	-4.9	17.8	-6.5	2.4
Palm	7.0	6.6	6.9	6.9	6.9	-1.3	1.0	0.3	0.5
Imports	**9.0**	**8.9**	**9.3**	**9.0**	**9.0**	**-2.6**	**2.7**	**-0.2**	**0.3**
Rapeseed	0.2	0.2	0.2	0.3	0.2	87.5	43.3	-30.2	0.0
Soya beans	0.3	0.3	0.3	0.3	0.3	0.1	-2.0	-1.0	0.0
Sunflower	1.4	1.7	1.7	1.4	1.5	-15.9	6.9	4.0	0.0
Palm	7.1	6.8	7.1	7.0	7.0	-1.5	0.2	0.3	0.0
Exports	**1.8**	**1.9**	**1.7**	**1.8**	**1.8**	**8.7**	**1.4**	**1.9**	**0.7**
Rapeseed	0.4	0.3	0.3	0.3	0.3	12.8	0.9	1.9	0.0
Soya beans	1.0	0.9	0.8	0.9	0.9	16.7	-0.1	2.2	0.0
Sunflower	0.4	0.5	0.5	0.4	0.4	-4.9	2.4	1.4	0.0
Palm	0.1	0.2	0.1	0.1	0.1	0.8	-1.6	1.8	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 %	**68.6**	**69.3**	**69.1**	**82.6**	**75.2**				

STATISTICAL ANNEX

ARABLE CROPS

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

	EU-28					% variation			
	2015/16	2016/17	2017/18e	2018/19f	2019/20f	18/19 vs 17/18	% 5-yr.av.	19/20 vs 18/19	% 5-yr.av.
Production	**5 165**	**5 459**	**6 142**	**4 949**	**5 542**	**-19%**	**-5%**	**12%**	**7%**
Field peas	2 077	2 315	2 766	2 001	2 283	-28%	-6%	14%	7%
Broad beans	1 962	1 922	2 173	1 618	1 900	-26%	-12%	17%	4%
Lentils	56	70	66	76	76	14%	18%	1%	18%
Lupins	364	297	263	176	236	-33%	-32%	34%	-8%
Chickpeas	61	78	132	191	197	45%	112%	3%	118%
Other dry pulses	646	776	743	887	851	20%	23%	-4%	18%
Total domestic use	**5 058**	**5 337**	**6 464**	**6 819**	**6 581**	**5%**	**21%**	**-3%**	**17%**
Field peas	1 630	1 716	2 517	3 287	2 758	31%	68%	-16%	41%
Broad beans	1 487	1 547	1 775	1 092	1 483	-38%	-21%	36%	8%
Lentils	253	299	294	293	289	0%	5%	-1%	3%
Lupins	453	445	465	450	382	-3%	0%	-15%	-15%
Chickpeas	199	214	271	378	350	40%	66%	-7%	54%
Other dry pulses	1 036	1 115	1 142	1 318	1 318	15%	20%	0%	20%
Imports	**987**	**1 099**	**1 504**	**2 552**	**1 900**	**70%**	**110%**	**-26%**	**56%**
Field peas	56	132	427	1 386	907	224%	474%	-35%	275%
Broad beans	9	10	9	8	9	-15%	-15%	18%	0%
Lentils	200	234	231	221	217	-5%	2%	-2%	0%
Lupins	89	148	202	275	146	36%	88%	-47%	0%
Chickpeas	146	147	167	198	153	18%	29%	-23%	0%
Other dry pulses	486	427	467	465	467	0%	0%	0%	0%
Exports	**1 094**	**1 221**	**1 183**	**683**	**955**	**-42%**	**-31%**	**40%**	**-3%**
Field peas	503	731	677	100	431	-85%	-77%	332%	0%
Broad beans	484	386	407	534	426	31%	25%	-20%	0%
Lentils	4	5	4	4	4	0%	-16%	19%	0%
Lupins	0	0	0	0	0	52%	-38%	61%	0%
Chickpeas	7	11	28	11	10	-60%	13%	-11%	0%
Other dry pulses	96	87	67	34	83	-50%	-60%	147%	0%
End stocks	**-**	**-**	**-**	**-**					

SUGAR

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

	EU-28					% variation			
	2015/2016	2016/2017	2017/2018e	2018/2019f	2019/2020f	18/19 vs 17/18	18/19 vs 5 yr. av.	19/20 vs 18/19	18/19 vs 5 yr. av.
Beginning stocks	4.0	1.9	2.2	2.4	1.4	10.9	-8.3	-44.3	-43.6
White sugar production	14.9	16.8	21.3	17.6	18.3	-17.3	-0.5	3.9	1.8
Imports	2.8	2.4	1.3	1.5	1.5	16.6	-43.6	0.0	-32.4
Availabilities	**21.8**	**21.2**	**24.8**	**21.6**	**21.2**	**-13.0**	**-7.2**	**-1.8**	**-6.8**
Total domestic uses white sugar	18.5	17.7	19.0	18.5	18.1	-2.6	-2.0	-2.1	-3.0
- Human	16.6	16.1	16.9	16.6	16.2	-1.5	-0.8	-2.4	-2.6
o.w. net exports in processed products	*0.9*	*1.0*	*1.0*	*1.0*	*1.1*	*0.0*	*11.0*	*10.9*	*16.7*
- Industrial	1.9	1.5	2.2	1.9	1.9	-11.6	-8.5	0.0	-4.9
o.w. bioethanol	*1.1*	*0.8*	*1.4*	*1.1*	*1.1*	*-18.5*	*-13.5*	*0.0*	*-8.2*
Exports	1.4	1.3	3.4	1.7	1.7	-49.3	24.6	0.0	15.0
Total uses	**19.9**	**19.0**	**22.4**	**20.2**	**19.8**	**-9.6**	**-0.9**	**-1.9**	**-2.3**
End stocks	1.9	2.2	2.4	1.4	1.4	-44.3	-43.6	0.0	-38.0
Self-sufficiency rate %	**81 %**	**95 %**	**112 %**	**95 %**	**101 %**				
Sugar beet production for sugar	93 967	106 077	136 379	108 044	116 936	-20.8	-3.2	8.2	3.5

OLIVE OIL

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

	EU-28					% variation			
	2014/15	2015/16	2016/17	2017/2018e	2018/2019f	17/18 vs 16/17	% 5-yr.av.	18/19 vs 17/18	% 5-yr.av
Production	**1 435**	**2 324**	**1 758**	**2 176**	**2 239**	**23.8**	**15.0**	**2.9**	**10.0**
Total domestic use	**1 572**	**1 626**	**1 401**	**1 624**	**1 597**	**15.9**	**2.4**	**-1.7**	**0.4**
Imports	225	97	90	180	90	99.1	45.4	-50.0	*-30.3*
Exports	508	573	558	563	625	1.0	3.2	10.9	11.5
End stocks	211	433	323	491	597	52.2	21.2	21.7	43.0
Self-sufficiency rate %	**91**	**143**	**125**	**134**	**140**	**6.8**	**12.7**	**4.6**	**10.0**

DAIRY

Table 1.14 Milk supply and utilisation in the EU-28

	EU-28						% variation				
	2015	2016	2017	2018e	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**	**22.6**	**22.4**	***-0.3***	***-1.0***	***-1.6***	***-0.6***	***-0.6***
of which EU-15	18.1	18.1	17.9	17.6	17.5	17.4	*-0.1*	*-1.0*	*-2.0*	*-0.5*	*-0.5*
of which EU-N13	5.2	5.2	5.1	5.1	5.1	5.0	*-1.1*	*-0.8*	*-0.2*	*-0.8*	*-1.1*
Milk yield (kg/dairy cow)[2]	**6 861**	**6 894**	**7 044**	**7 216**	**7 302**	**7 390**	***0.5***	***2.2***	***2.4***	***1.2***	***1.2***
of which EU-15	7 358	7 374	7 536	7 731	7 808	7 886	*0.2*	*2.2*	*2.6*	*1.0*	*1.0*
of which EU-N13	5 134	5 209	5 321	5 445	5 553	5 665	*1.5*	*2.1*	*2.3*	*2.0*	*2.0*
Milk production (million t)	**162.9**	**162.9**	**165.1**	**166.4**	**167.3**	**168.3**	***0.0***	***1.4***	***0.7***	***0.6***	***0.6***
of which EU-15	133.8	133.9	135.7	136.5	137.2	137.9	*0.1*	*1.4*	*0.6*	*0.5*	*0.5*
of which EU-N13	29.2	29.0	29.4	29.8	30.1	30.4	*-0.5*	*1.2*	*1.6*	*0.8*	*0.9*
Feed use (million t)	3.4	3.7	3.4	3.4	3.3	3.3	*6.9*	*-8.2*	*-0.1*	*-1.0*	*-1.0*
On farm use and direct sales (mio t)	6.7	5.9	5.7	5.6	5.4	5.2	*-12.6*	*-2.4*	*-2.1*	*-3.0*	*-4.0*
Delivered to dairies (million t)	**152.8**	**153.4**	**156.1**	**157.4**	**158.5**	**159.8**	***0.4***	***1.7***	***0.9***	***0.7***	***0.8***
of which EU-15	130.9	131.2	133.2	134.1	134.8	135.6	*0.2*	*1.5*	*0.7*	*0.6*	*0.6*
of which EU-N13	21.9	22.2	22.9	23.3	23.7	24.2	*1.4*	*3.1*	*1.9*	*1.8*	*1.8*
Delivery ratio (%)[3]	**93.8**	**94.2**	**94.5**	**94.6**	**94.8**	**94.9**	***0.4***	***0.4***	***0.1***	***0.2***	***0.2***
of which EU-15	97.9	98.0	98.1	98.2	98.3	98.3	*0.1*	*0.1*	*0.1*	*0.0*	*0.1*
of which EU-N13	75.1	76.5	77.9	78.1	78.9	79.6	*1.9*	*1.8*	*0.3*	*0.9*	*0.9*
Fat content of milk (%)	4.01	4.07	4.05	4.04	4.06	4.06	*1.5*	*-0.4*	*-0.2*	*0.3*	*0.1*
Protein content of milk (%)	3.36	3.42	3.46	3.45	3.46	3.46	*1.8*	*1.0*	*-0.2*	*0.2*	*0.2*

[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 around 99.7% of EU total production).*

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

Table 1.15 EU-28 fresh dairy products market balance (1000 t)

	EU-28						% variation				
	2015	2016	2017	2018e	2019f	2020f	*16/15*	*17/16*	*18/17*	*19/18*	*20/19*
Production	**46 809**	**46 276**	**46 310**	**45 982**	**45 895**	**45 886**	***-1.1***	***0.1***	***-0.7***	***-0.2***	***0.0***
of which Drinking Milk	31 275	30 764	30 713	30 252	30 070	29 950	*-1.6*	*-0.2*	*-1.5*	*-0.6*	*-0.4*
of which Cream	2 741	2 736	2 786	2 772	2 786	2 800	*-0.2*	*1.8*	*-0.5*	*0.5*	*0.5*
of which Acidified Milk	8 056	8 161	8 195	8 236	8 294	8 352	*1.3*	*0.4*	*0.5*	*0.7*	*0.7*
of which Other Fresh Products[2]	4 738	4 616	4 616	4 723	4 745	4 785	*-2.6*	*0.0*	*2.3*	*0.5*	*0.8*
of which EU-15	40 194	39 625	39 514	39 119	38 963	38 885	*-1.4*	*-0.3*	*-1.0*	*-0.4*	*-0.2*
of which EU-N13	6 615	6 651	6 795	6 863	6 932	7 001	*0.5*	*2.2*	*1.0*	*1.0*	*1.0*
Imports (extra EU)	**12**	**14**	**26**	**18**	**18**	**18**	***19***	***78***	***-30***	***0***	***0***
Exports (extra EU)	**962**	**1 168**	**1 134**	**1 093**	**1 093**	**1 104**	***21***	***-3***	***-4***	***0***	***1***
Domestic use[1]	**45 859**	**45 123**	**45 201**	**44 907**	**44 819**	**44 800**	***-1.6***	***0.2***	***-0.6***	***-0.2***	***0.0***
p.c. consumption (kg)	90.5	88.8	88.7	87.9	87.6	87.5	*-1.9*	*-0.1*	*-0.9*	*-0.4*	*-0.2*
Self-sufficiency rate (%)	**102**	**103**	**102**	**102**	**102**	**102**					

[1] *Domestic use includes stock changes.*

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

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

Table 1.16 EU-28 cheese market balance (1000 t)

	EU-28						% variation				
	2015	2016	2017	2018e	2019f	2020f	*16/15*	*17/16*	*18/17*	*19/18*	*20/19*
Production (in dairies)	**9 872**	**10 100**	**10 236**	**10 268**	**10 345**	**10 448**	***2.3***	***1.3***	***0.3***	***0.8***	***1.0***
of which from pure cow's milk	9 030	9 240	9 349	9 379	9 450	9 544	*2.3*	*1.2*	*0.3*	*0.8*	*1.0*
of which from other milk[1]	842	860	887	889	895	904	*2.2*	*3.1*	*0.2*	*0.8*	*1.0*
EU-15 (in dairies)	8 444	8 607	8 682	8 690	8 760	8 828	*1.9*	*0.9*	*0.1*	*0.8*	*0.8*
EU-N13 (in dairies)	1 428	1 494	1 554	1 578	1 585	1 620	*4.6*	*4.1*	*1.5*	*0.5*	*2.2*
Processed cheese impact[2]	333	349	353	356	359	363	*4.8*	*1.2*	*1.1*	*0.9*	*0.9*
Total production	**10 204**	**10 449**	**10 588**	**10 624**	**10 705**	**10 811**	***2.4***	***1.3***	***0.3***	***0.8***	***1.0***
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**	**841**	**853**	***11.3***	***3.6***	***0.5***	***1.0***	***1.5***
Total domestic use	**9 517**	**9 780**	**9 879**	**9 911**	**9 958**	**10 017**	***2.8***	***1.0***	***0.3***	***0.5***	***0.6***
Stock changes	**30**	**- 60**	**- 59**	**- 60**	**- 35**	**0**	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Processing use	292	303	308	309	312	316	*3.7*	*1.5*	*0.6*	*1.0*	*1.0*
Human consumption	9 225	9 476	9 571	9 601	9 646	9 701	*2.7*	*1.0*	*0.3*	*0.5*	*0.6*
of which EU-15	8 098	8 301	8 367	8 378	8 400	8 442	*2.5*	*0.8*	*0.1*	*0.3*	*0.5*
of which EU-N13	1 127	1 175	1 204	1 224	1 246	1 259	*4.3*	*2.4*	*1.6*	*1.8*	*1.1*
p.c. consumption (kg)	18.2	18.6	18.8	18.8	18.9	18.9	*2.5*	*0.8*	*0.1*	*0.3*	*0.5*
Self-sufficiency rate (%)	**107**	**107**	**107**	**107**	**107**	**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.*

DAIRY

Table 1.17 EU-28 whole milk powder market balance (1000 t)

	EU-28						% variation				
	2015	2016	2017	2018e	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Production	**716**	**729**	**774**	**734**	**720**	**712**	***1.8***	***6.1***	***-5.1***	***-2.0***	***-1.1***
of which EU-15	664	682	730	695	681	674	*2.6*	*7.1*	*-4.8*	*-2.0*	*-1.0*
of which EU-N13	52	47	44	39	39	38	*-9.1*	*-7.8*	*-10.0*	*-2.0*	*-2.0*
Imports	**4**	**6**	**2**	**2**	**2**	**2**	***44***	***-72***	***9***	***0***	***0***
Exports	**400**	**381**	**393**	**334**	**308**	**292**	***-4.7***	***3.0***	***-14.9***	***-8.0***	***-5.0***
Domestic Use[1]	**320**	**353**	**382**	**402**	**414**	**422**	***10.4***	***8.2***	***5.1***	***3.0***	***1.9***
Self-sufficiency rate (%)	**224**	**206**	**202**	**183**	**174**	**169**					

[1] *Domestic use includes stock changes.*

Table 1.18 EU-28 skimmed milk powder market balance (1000 t)

	EU-28						% variation				
	2015	2016	2017	2018e	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Production	**1 537**	**1 560**	**1 525**	**1 502**	**1 516**	**1 560**	***1.5***	***-2.3***	***-1.5***	***1.0***	***2.9***
of which EU-15	1 324	1 342	1 323	1 290	1 300	1 335	*1.4*	*-1.4*	*-2.5*	*0.8*	*2.7*
of which EU-N13	213	218	202	212	216	225	*2.4*	*-7.7*	*5.0*	*2.0*	*4.0*
Imports (extra EU)	**3**	**4**	**2**	**3**	**3**	**2**	***8***	***-33***	***41***	***0***	***-54***
Exports (extra EU)	**692**	**575**	**780**	**822**	**846**	**838**	***-17***	***36***	***5***	***3***	***-1***
Domestic use	**740**	**767**	**792**	**820**	**827**	**834**	***3.7***	***3.2***	***3.5***	***0.8***	***0.8***
Ending stocks	**279**	**501**	**456**	**319**	**165**	**55**					
Private (industry)	250	150	80	220	165	55					
Public (intervention)	29	351	376	99	0	0					
Stock changes	109	222	- 45	- 137	- 154	- 110					
Self-sufficiency rate (%)	**208**	**203**	**192**	**183**	**183**	**187**					

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

	EU-28						% variation				
	2015	2016	2017	2018e	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Production	**2 301**	**2 393**	**2 392**	**2 396**	**2 414**	**2 436**	***4.0***	***0.0***	***0.2***	***0.8***	***0.9***
of which EU-15	2 023	2 094	2 089	2 087	2 104	2 125	*3.5*	*-0.2*	*-0.1*	*0.8*	*1.0*
of which EU-N13	277	299	302	308	310	311	*7.8*	*1.1*	*2.0*	*0.5*	*0.5*
Imports	**3**	**3**	**3**	**9**	**5**	**5**	***11***	***3***	***197***	***-41***	***0***
Exports	**172**	**206**	**170**	**157**	**160**	**171**	***20***	***-18***	***-8***	***2***	***7***
Domestic use	**2 121**	**2 209**	**2 234**	**2 247**	**2 259**	**2 270**	***4.1***	***1.1***	***0.6***	***0.5***	***0.5***
p.c. consumption (kg)	4.2	4.3	4.4	4.4	4.4	4.4	*3.9*	*0.9*	*0.3*	*0.4*	*0.4*
Ending stocks	**135**	**115**	**106**	**105**	**105**	**105**					
Private	135	115	105	105	105	105					
Public (intervention)	0	0	1	0	0	0					
Stock changes	10	- 20	- 10	0	0	0					
Self-sufficiency rate (%)	**108**	**108**	**107**	**107**	**107**	**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 1.20 EU-28 overall meat balance (1000 t carcass weight equivalent)

000 t carcass weight	EU-28						% variation				
	2015	2016	2017	2018e	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Gross Indigenous Production	**45 994**	**47 362**	**47 277**	**48 552**	**48 746**	**49 026**	***3.0***	***-0.2***	***2.7***	***0.4***	***0.6***
Live Imports	2	2	2	2	3	3	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*
Live Exports	247	291	309	311	317	321	*17.8*	*6.3*	*0.6*	*1.9*	*1.4*
Net Production	**45 749**	**47 073**	**46 971**	**48 244**	**48 432**	**48 707**	***2.9***	***-0.2***	***2.7***	***0.4***	***0.6***
of which EU-15	37 827	38 704	38 445	39 257	39 288	39 442	*2.3*	*-0.7*	*2.1*	*0.1*	*0.4*
of which EU-N13	7 922	8 370	8 525	8 987	9 144	9 265	*5.6*	*1.9*	*5.4*	*1.7*	*1.3*
Meat Imports	**1 368**	**1 402**	**1 261**	**1 302**	**1 341**	**1 380**	***2.4***	***-10.1***	***3.3***	***3.0***	***2.9***
Meat Exports	**3 837**	**4 627**	**4 411**	**4 550**	**4 833**	**5 008**	***20.6***	***-4.7***	***3.2***	***6.2***	***3.6***
Consumption	**43 281**	**43 849**	**43 821**	**44 996**	**44 941**	**45 079**	***1.3***	***-0.1***	***2.7***	***-0.1***	***0.3***
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***	***69.9***	***70.0***	***1.1***	***-0.3***	***2.5***	***-0.3***	***0.1***
Self-sufficiency (%)	**106**	**108**	**108**	**108**	**108**	**109**					

Table 1.21 EU-28 beef/veal market balance (1000 t carcass weight equivalent)

000 t carcass weight	EU-28						% variation				
	2015	2016	2017	2018e	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Gross Indigenous Production	**7 835**	**8 070**	**8 104**	**8 242**	**8 137**	**8 112**	***3.0***	***0.4***	***1.7***	***-1.3***	***-0.3***
Live Imports	0	0	0	0	0	0	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*
Live Exports	178	219	235	234	237	239	*23.0*	*7.4*	*-0.3*	*1.0*	*1.0*
Net Production	**7 657**	**7 851**	**7 869**	**8 008**	**7 900**	**7 873**	***2.5***	***0.2***	***1.8***	***-1.3***	***-0.3***
of which EU-15	6 819	6 974	6 931	7 059	6 939	6 905	*2.3*	*-0.6*	*1.8*	*-1.7*	*-0.5*
of which EU-N13	838	877	937	949	961	969	*4.7*	*6.9*	*1.2*	*1.3*	*0.8*
Meat Imports	**300**	**304**	**285**	**312**	**324**	**331**	***1.4***	***-6.3***	***9.4***	***4.0***	***2.0***
Meat Exports	**211**	**248**	**271**	**250**	**258**	**260**	***17.7***	***9.0***	***-7.5***	***3.0***	***1.0***
Consumption	**7 746**	**7 907**	**7 883**	**8 070**	**7 967**	**7 944**	***2.1***	***-0.3***	***2.4***	***-1.3***	***-0.3***
Per Capita Consumption (kg)	**10.6**	**10.8**	**10.8**	**11.0**	**10.8**	**10.8**	***1.8***	***-0.5***	***2.1***	***-1.5***	***-0.5***
Share in total meat consumption	***17.9***	***18.0***	***18.0***	***17.9***	***17.7***	***17.6***					
Self-sufficiency (%)	**101**	**102**	**103**	**102**	**102**	**102**					

Table 1.22 EU-28 pigmeat market balance (1000 t carcass weight equivalent)

000 t carcass weight	EU-28						% variation				
	2015	2016	2017	2018e	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Gross Indigenous Production	**23 456**	**23 876**	**23 673**	**24 139**	**24 138**	**24 254**	***1.8***	***-0.9***	***2.0***	***0.0***	***0.5***
Live Imports	0	0	0	0	0	0	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*
Live Exports	21	10	13	16	20	22	*-51.9*	*30.0*	*27.8*	*20.0*	*10.0*
Net Production	**23 436**	**23 866**	**23 660**	**24 123**	**24 119**	**24 232**	***1.8***	***-0.9***	***2.0***	***0.0***	***0.5***
of which EU-15	19 903	20 261	20 049	20 363	20 384	20 485	*1.8*	*-1.0*	*1.6*	*0.1*	*0.5*
of which EU-N13	3 533	3 605	3 611	3 760	3 735	3 747	*2.1*	*0.1*	*4.1*	*-0.6*	*0.3*
Meat Imports	**11**	**12**	**14**	**15**	**16**	**19**	***6.1***	***16.6***	***5.5***	***10.0***	***15.0***
Meat Exports	**2 218**	**2 813**	**2 574**	**2 678**	**2 919**	**3 065**	***26.8***	***-8.5***	***4.1***	***9.0***	***5.0***
Consumption	**21 229**	**21 065**	**21 100**	**21 460**	**21 216**	**21 186**	***-0.8***	***0.2***	***1.7***	***-1.1***	***-0.1***
Per Capita Consumption (kg)	**32.5**	**32.2**	**32.1**	**32.6**	**32.2**	**32.0**	***-1.1***	***-0.1***	***1.4***	***-1.4***	***-0.4***
Share in total meat consumption	*49.0*	*48.0*	*48.2*	*47.7*	*47.2*	*47.0*					
Self-sufficiency (%)	**110**	**113**	**112**	**112**	**114**	**114**					

MEAT

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

000 t carcass weight	EU-28						% variation				
	2015	2016	2017	2018e	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Gross Indigenous Production	**13 797**	**14 503**	**14 576**	**15 256**	**15 565**	**15 749**	***5.1***	***0.5***	***4.7***	***2.0***	***1.2***
Live Imports	1	2	2	2	2	2	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*
Live Exports	10	10	8	9	10	10	*-7.7*	*-12.7*	*10.0*	*4.0*	*2.0*
Net Production	**13 788**	**14 495**	**14 570**	**15 248**	**15 557**	**15 742**	***5.1***	***0.5***	***4.7***	***2.0***	***1.2***
of which EU-15	10 318	10 691	10 677	11 050	11 196	11 279	*3.6*	*-0.1*	*3.5*	*1.3*	*0.7*
of which EU-N13	3 470	3 803	3 893	4 198	4 361	4 463	*9.6*	*2.4*	*7.8*	*3.9*	*2.3*
Meat Imports	**855**	**882**	**789**	**801**	**830**	**859**	***3.3***	***-10.6***	***1.6***	***3.6***	***3.4***
Meat Exports	**1 388**	**1 546**	**1 532**	**1 593**	**1 626**	**1 652**	***11.4***	***-0.9***	***4.0***	***2.1***	***1.6***
Consumption	**13 254**	**13 831**	**13 827**	**14 457**	**14 761**	**14 948**	***4.4***	***0.0***	***4.6***	***2.1***	***1.3***
Per Capita Consumption (kg)	**22.9**	**23.8**	**23.8**	**24.8**	**25.2**	**25.5**	***4.0***	***-0.3***	***4.3***	***1.9***	***1.0***
Share in total meat consumption	*30.6*	*31.5*	*31.6*	*32.1*	*32.8*	*33.2*					
Self-sufficiency (%)	**104**	**105**	**105**	**106**	**105**	**105**					

Table 1.24 EU-28 sheep and goat meat market balance (1000 t carcass weight equivalent)

000 t carcass weight	EU-28						% variation				
	2015	2016	2017	2018e	2019f	2020f	16/15	17/16	18/17	19/18	20/19
Gross Indigenous Production	**907**	**914**	**925**	**915**	**906**	**910**	***0.8***	***1.2***	***-1.1***	***-0.9***	***0.5***
Live Imports	0	0	0	0	0	0	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*
Live Exports	38	52	52	51	51	51	*38.4*	*0.4*	*-3.6*	*0.0*	*0.0*
Net Production	**869**	**862**	**872**	**864**	**855**	**860**	***-0.9***	***1.2***	***-0.9***	***-1.0***	***0.5***
of which on-farm slaughterings	101	103	99	91	91	90	*2.4*	*-4.6*	*-7.2*	*-1.0*	*-1.0*
of which EU-15	787	778	788	784	769	773	*-1.2*	*1.3*	*-0.5*	*-1.9*	*0.5*
of which EU-N13	82	84	84	80	86	87	*2.0*	*0.8*	*-5.3*	*7.8*	*0.5*
Meat Imports	**202**	**203**	**173**	**174**	**170**	**172**	***0.4***	***-14.9***	***0.6***	***-2.0***	***1.0***
Meat Exports	**20**	**19**	**34**	**29**	**29**	**30**	***-4.7***	***80.9***	***-16.7***	***3.0***	***2.0***
Consumption	**1 052**	**1 046**	**1 011**	**1 009**	**996**	**1 002**	***-0.6***	***-3.3***	***-0.2***	***-1.3***	***0.5***
Per Capita Consumption (kg)	**1.8**	**1.8**	**1.7**	**1.7**	**1.7**	**1.7**	***-0.8***	***-3.6***	***-0.4***	***-0.5***	***0.3***
Share in total meat consumption	*2.4*	*2.4*	*2.3*	*2.2*	*2.2*	*2.2*					
Self-sufficiency (%)	**86**	**87**	**91**	**91**	**91**	**91**					

Table 1.25 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%**
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%**
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%**
Other Africa	**2008**	**17%**	20%	11%	**9%**	8%	5%	22%	**8%**	**12%**	2%	21%	4%	**2%**	**13%**
	2018	**17%**	21%	11%	**16%**	16%	6%	40%	**4%**	**9%**	3%	12%	3%	**2%**	**7%**
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%**
USA Mexico Canada	**2008**	**1%**	0%	0%	**2%**	0%	3%	0%	**3%**	**7%**	23%	0%	0%	**51%**	**37%**
	2018	**1%**	0%	3%	**4%**	1%	5%	1%	**2%**	**6%**	20%	1%	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-Bisau, 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: USA, Mexico, Canada