



EUROPEAN COMMISSION  
DIRECTORATE-GENERAL FOR AGRICULTURE AND RURAL DEVELOPMENT

Directorate E – Markets  
The Director

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## MINUTES

*Meeting of the CDG on Animal Production – focus on Pigmeat*

**25 & 26 April 2023**

Chair: AGRI E3 Animal Products

The following organisations were represented: CELCAA; COPA; EEB; EFPRA; EURAF; EUROCOMMERCE; FEFAC; FEFANA; FESASS; FOODDRINKEUROPE; IFOAM; ORIGINEU.

### **1. Approval of the agenda and of the minutes of previous meeting**

2. **Nature of the meeting** : Non-public

### **3. List of points discussed**

1. Discussions with experts – exchange of views on production figures
2. EU market situation
3. World market situation
4. Mercosur trade agreement
5. Short term outlook – meat products
6. African Swine Fever (ASF)

#### **Point 1 – Discussions with experts – exchange of views on production figures**

Experts concluded that in 2023, EU pigmeat GIP is likely to decrease by 4.1%. The decrease was estimated to be more intense in the first half of 2023.

At the source of this reduction, Member States' experts mentioned a decrease in the pig population, particularly in the sow herd, in many Member States. However, one expert expressed slight optimism regarding the future of the sow herd, as the profitability of piglet production could stabilize it. Additionally, political choices and

their potential impact on pig production create a great deal of uncertainty for producers.

Pressure on prices, whether from slaughterhouses or from imports of cheaper pig products from other Member States, may also contribute to a reduction in GIP.

The continued impact of African Swine Fever is another important factor.

Overall, there is a lot of uncertainty surrounding pig production and animal production in general.

## **Point 2 – EU market situation**

The Commission services presented the most recent market data.

Both pig carcass prices and piglet prices are at historically high levels but their rate of increase is slowing down and a ceiling seems to be reached. This evolution is in line with the seasonal price pattern. Record high EU prices represent a significant disparity compared to lower prices observed among the EU's main competitors on the global market.

There is a continued pig production decrease in the EU, with the majority of Member States witnessing a reduction.

Exports are further decreasing but China remains the most important destination for EU pigmeat. EU imports are low and the main exporter to the EU remains the UK.

## **Point 3 - World market situation**

GIRA's representative provided a brief overview of the global pork market. In 2022, pork production remained relatively stable in North America and declined in Europe amid rising input cost and declining Chinese import demand. Beginning 2023, prices continued to rise in the EU leading to record pig prices while US prices declined making the latter origin more competitive on global markets. EU prices remained high despite declining feed raw material prices (cereals and oilseeds) underlying a continued tight supply situation at the moment. This is likely to ease over the year as it seems increasingly difficult for processors to pass on price increase downstream and improving margins will incentive a production recovery.

## **Point 4 – Mercosur trade agreement**

The Commission services gave an update on the Mercosur trade agreement. Following the political agreement reached in June 2019, the trade part of the agreement and schedule of tariffs are published on the Europa website. They recalled the outcome of the agreement for pigmeat with progressive liberalisation on the Mercosur side, while a Tariff Rate Quota with an in-quota duty is limiting access to the EU market. The trade agreement will also provide a platform to address SPS and TBT barriers hindering EU exports. Currently the Commission is carrying out technical work to finalise the trade part of the Agreement (prior users list for Geographical Indications) and the legal revision of the texts. To address environmental concerns expressed by stakeholders and Member states, the Commission has communicated to Mercosur an “Additional instrument”, an

interpretative text aiming to clarify the commitments of the parties. The Commission and Mercosur are working on it.

### **Point 5 – Short term outlook – meat products**

The Commission services provided an overview of the short-term outlook for meats. On the energy side, oil and natural gas prices went down sharply but an increase might be expected in the second half of 2023. Feed prices are also coming down from very high levels in 2022 but it is not clear at which level they will stabilise. Fertiliser prices might stay high for import dependant components (K, P) while urea is on a downward path. Freight costs are almost back to normal after the COVID peak in 2021. A smaller breeding herd and African Swine Fever push pigmeat production down in 2023 (-5%), despite better feed prices. Poultry production is likely to grow modestly (+1.1%) thanks to good demand, lower feed and energy costs, while HPAI remains a threat whole year round. Beef production is expected to decrease further by 1.6%, due to structural adjustments, despite relatively high prices. Historically low sheep and goat flock pushes slaughterings further down, despite high prices. A slight declining trade surplus in meats is expected for 2023, after an already sharp deterioration in 2022. According to EIT, EU consumers were cutting food costs by buying less or switching to cheaper brands.

### **Point 6 – African Swine Fever (ASF)**

The Commission services provided a brief summary on the African swine fever (ASF) epidemiological situation in the EU. ASF is present in 12 EU Member States. The situation in wild boar and domestic pigs remains under control, however challenges still remain such as long-distance ‘jumps’ (preparedness is key!) and ASF control and eradication in wild boar in wide areas. On the other hands, the EU has a knowledge and expertise to deal with the focal introduction of ASF in wild boar in limited areas (e.g. it was eradicated from CZ and BE).

A new ASF Regulation (Commission Implementing Regulation (EU) 2023/594 of 16 March 2023 laying down special disease control measures for African swine fever and repealing Implementing Regulation (EU) 2021/605) was adopted by the Commission and is applicable from 21 April 2023. It ensures a continuous and consistent application of special disease control measures for ASF in the Union but also adds new elements to the prevention, control and eradication of ASF such as a harmonised shape of special health or, where relevant, identification marks for certain products of animal origin and a national action plan for wild porcine animals in order to avoid the spread of ASF in the Union.

The Joint Research Centre provided an overview of promising ASF vaccine candidates and presented current efforts at EU level to further support their development.

Research efforts to find effective control measures for ASF, including vaccines, have been stepped up in the last decade and are producing promising results. Several ASF vaccine approaches have been proposed, based on inactivated, live attenuated or subunit vaccines. Live attenuated vaccines have shown high survival rates in laboratory tests and, recently, Vietnam approved two vaccines of this type, which have moved forward into field trials. However, several issues are still preventing scaling up and commercialization, such as safety concerns, potential return to

virulence, lack of cross-protection efficacy, applicability to wildlife, availability of stable cell lines for manufacturing and need for differentiating infected from vaccinated animals.

The development, validation and deployment of an effective and safe ASF vaccine will benefit from a standardised pipeline for vaccine evaluation and side-by-side comparison. WOAHA is currently developing guidelines specific for ASF vaccine testing. As well, a strict control of the vaccination process during field tests is necessary to ensure full compliance with the manufacturers and government guidelines. In this regard, DG-JRC, DG-SANTE, DG-AGRI and other EU services have been discussing a roadmap to validate the protective efficacy and safety of most promising vaccines against ASF in double blind set up and advance those achieving pre-established performance criteria.

#### **4. Next meeting**

The next meeting of the CDG on Animal Production will take place on 12 June 2023 with a focus on sheep/goat and beekeeping.

#### **5. List of participants:** Attached

Pierre BASCOU

List of participants  
**Meeting of the Civil Dialog Group on Animal Production – Pigeat  
 25 & 26 April 2023**

ORGANISATION
CELCAA – EUROPEAN LIAISON COMMITTEE FOR THE AGRICULTURAL AND AGRI-FOOD TRADE
COPA – “EUROPEAN FARMERS / COMMITTEE OF PROFESSIONAL AGRICULTURAL ORGANISATIONS OF THE EUROPEAN UNION
EEB – EUROPEAN ENVIRONMENTAL BUREAU
EFPRA – EUROPEAN FAT PROCESSORS & RENDERERS ASSOCIATION
EURAF – EUROPEAN AGROFORESTRY FEDERATION
EUROCOMMERCE
FEFAC – EUROPEAN FEED MANUFACTURERS FEDERATION / FEDERATION EUROPEENNE DES FABRICANTS D’ALIMENTS COMPOSES
FEFANA – EU ASSOCIATION OF SPECIALITY FEED INGREDIENTS AND THEIR MIXTURES
FESASS – FEDERATION EUROPEENNE POUR LA SANTE ANIMALE ET LA SECURITE SANITAIRE
FOODDRINKEUROPE
IFOAM – INTERNATIONAL FEDERATION OF ORGANIC AGRICULTURE MOVEMENTS EUROPEAN REGIONAL GROUP
ORIGINEU – ORGANISATION POUR UN RESEAU INTERNATIONAL D’INDICATIONS GEOGRAPHIQUES
AD-HOC EXPERT