

The 2016 EU Agricultural Outlook Conference

MEAT

Brussels, 6-7 December



Outlook for EU meat markets



DOMESTIC DEMAND

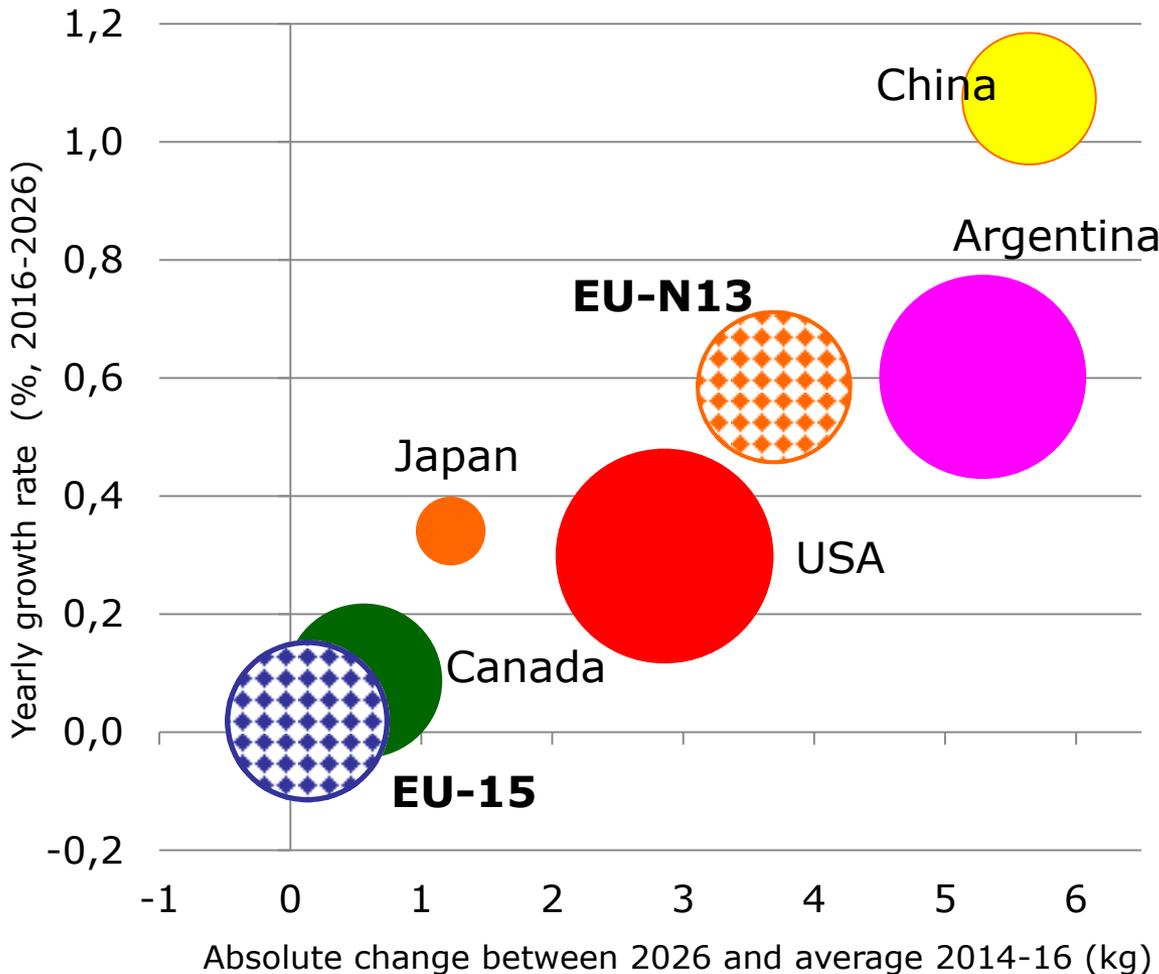


INTERNATIONAL DEMAND



EU SUPPLY

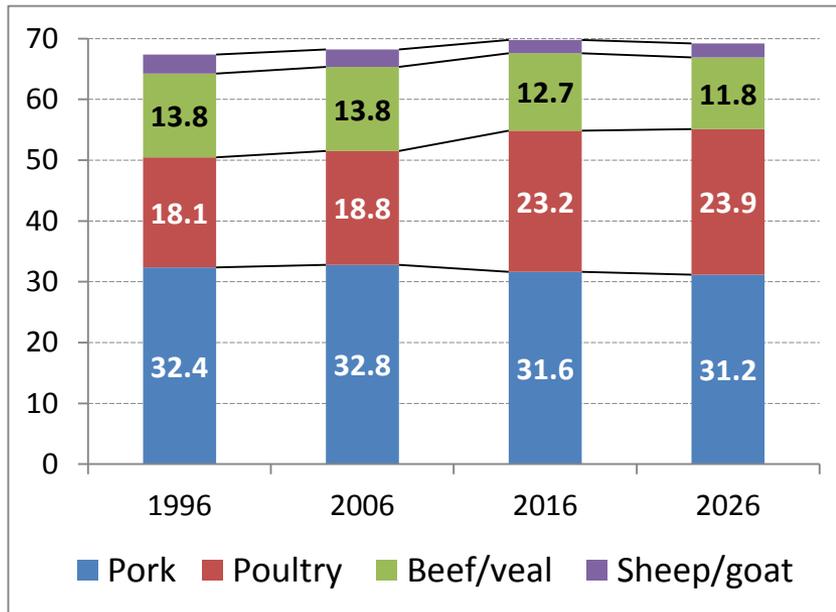
Changes in *per capita* meat consumption



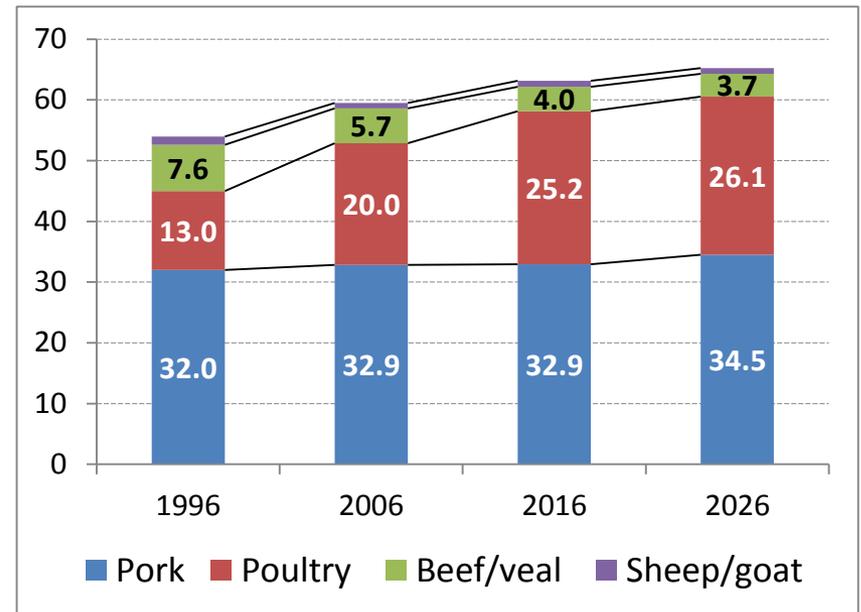
EU-15: stable
EU-N13: up

Meat types in EU consumer basket (kg/capita)

EU-15



EU-N13



Note: consumption in retail weight

Steady growth in world meat consumption

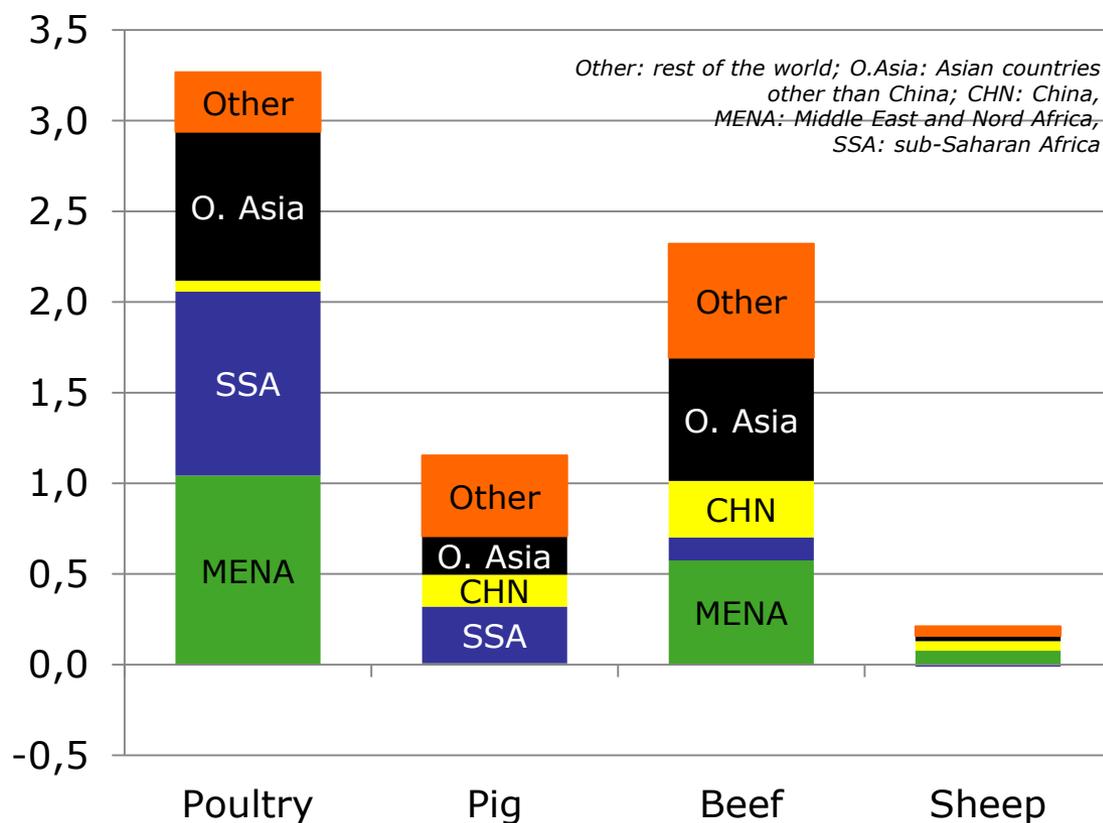
Main drivers:

- population and income growth
- convenience and price
- religious guidelines
- social and environmental concerns, ...

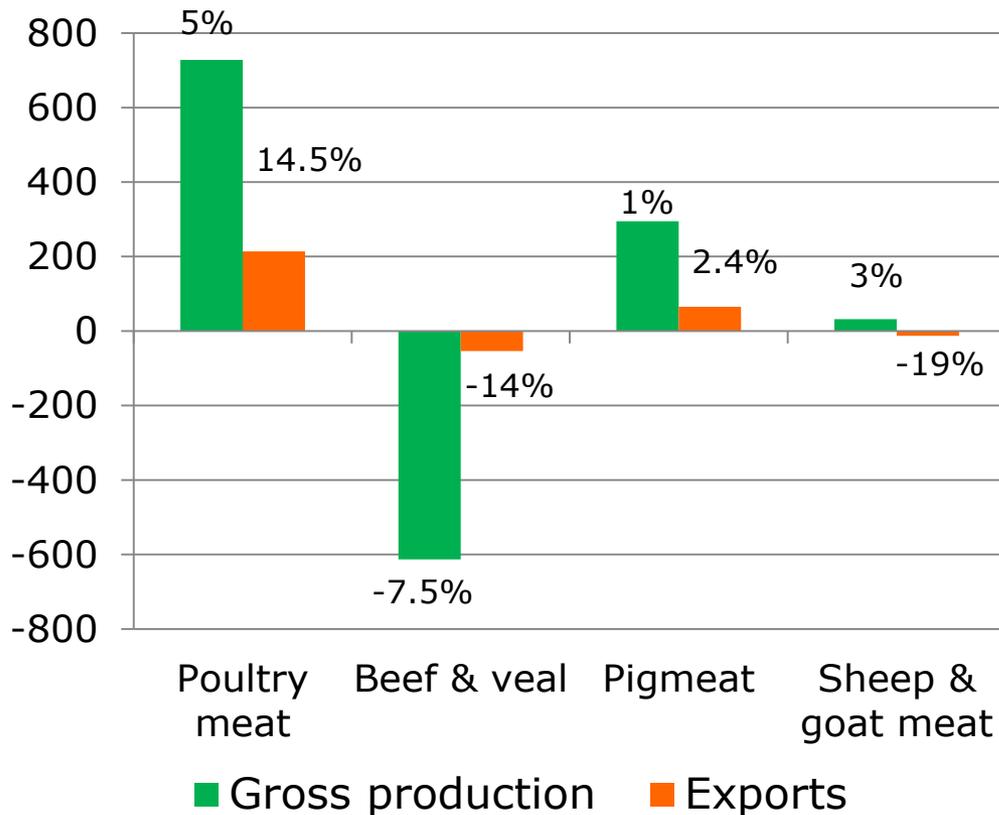
Outlook:

- +1.3% per year in world consumption
- +2.0% per year in world imports

Change in world imports of meat products and live animals 2026 vs. 2016 (million tonnes carcass weight)



Changes in EU production and exports (2026 vs 2016, '000 t)



Growing EU demand

Exports of wings, legs and offal; competing world market



Decline in EU demand

Decrease in cow herd

Decline in demand from Mediterranean region

Niche export markets



Slight increase in EU demand

Environmental concerns

China effect will disappear



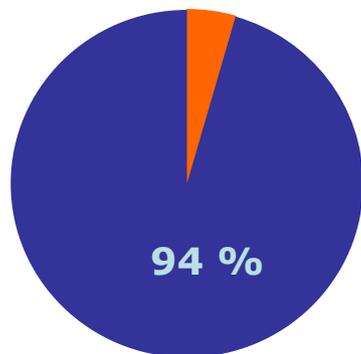
Slight increase in EU demand

Lack of competitiveness

Note: the production of beef&veal and sheep&goat includes the net trade of live animals.

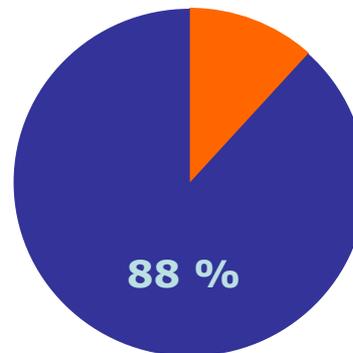
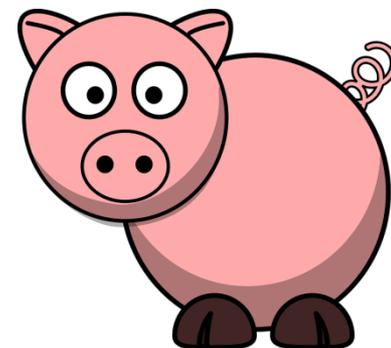
EU production goes to EU market

Beef: 7.5 million t

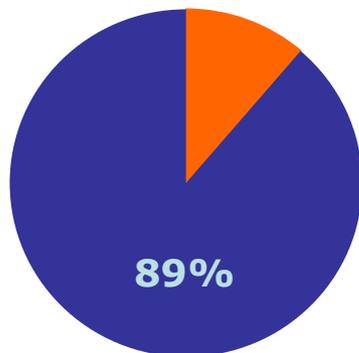
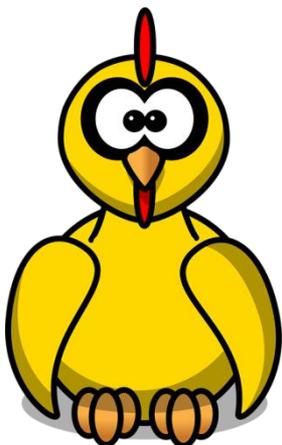


■ exports
■ domestic

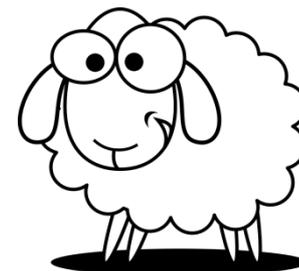
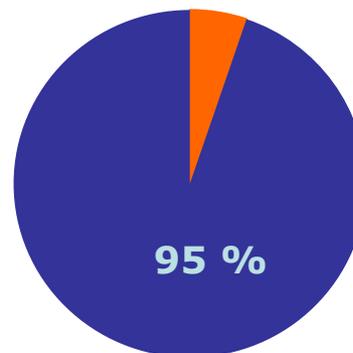
Pigmeat: 24 million t



Poultry: 15 million t

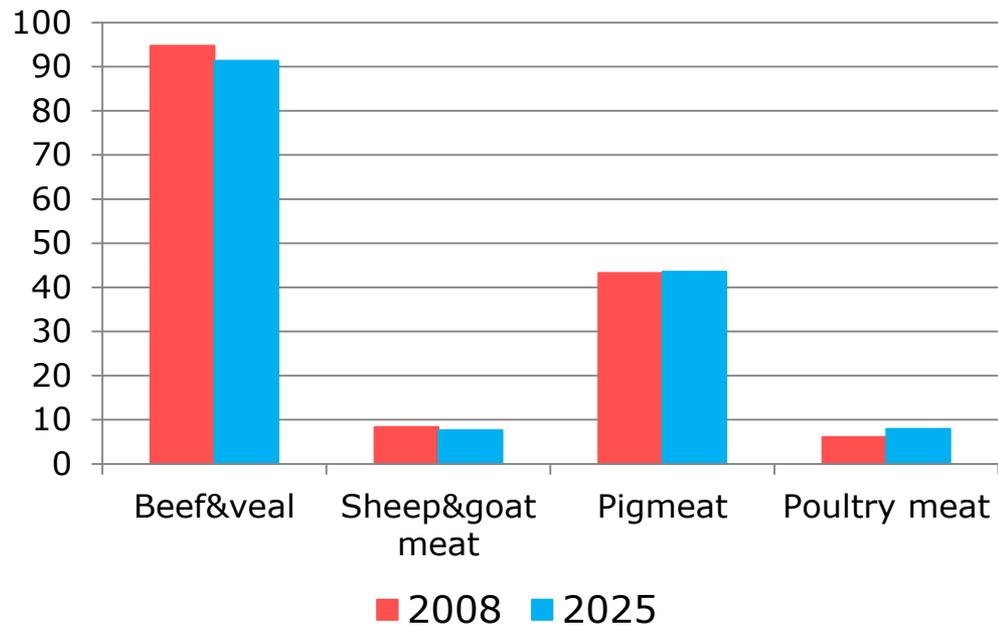


Sheep&goat: 1 million t



Environmental aspects of EU meat production

Total GHG emissions from meat
in 2025 vs. 2008 (million t CO₂-eq.)



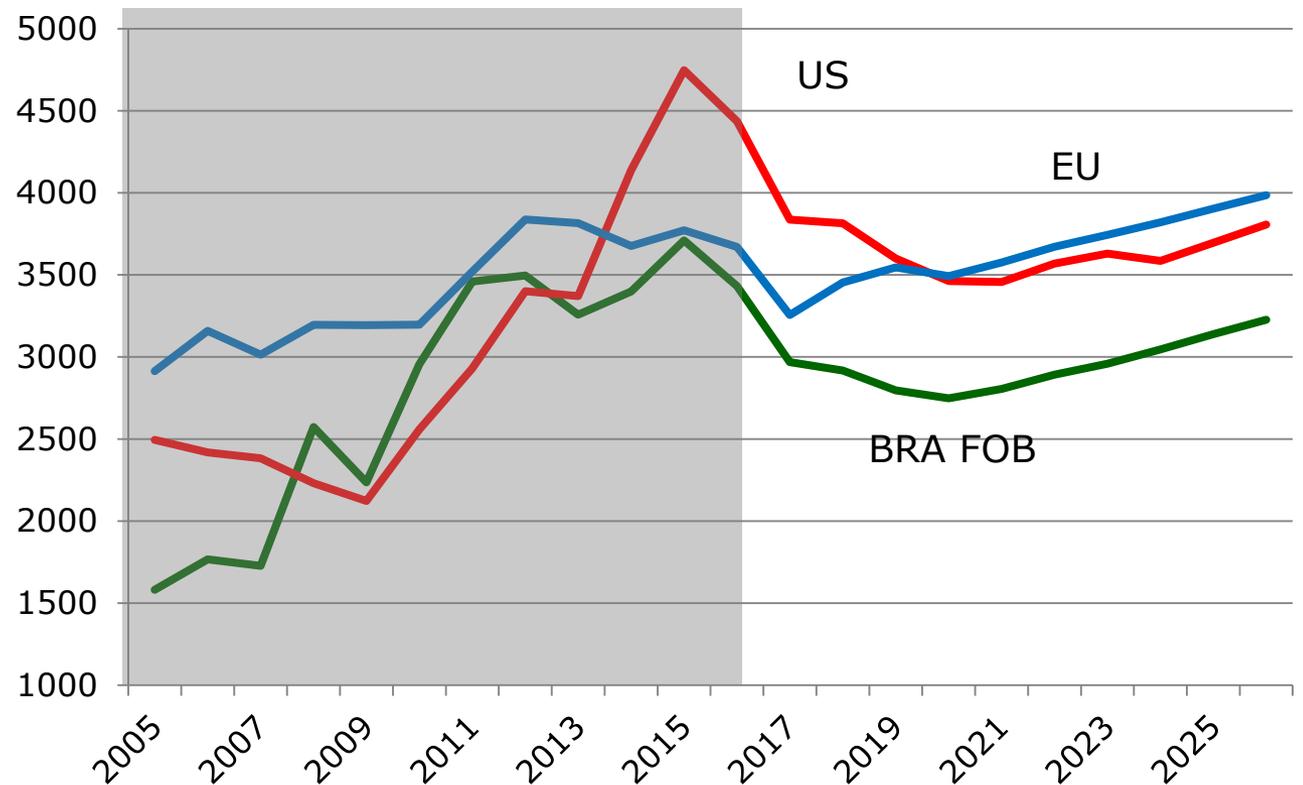


World beef prices (EUR/t)



Main drivers:

- EU dairy market
- EU consumption
- World market price



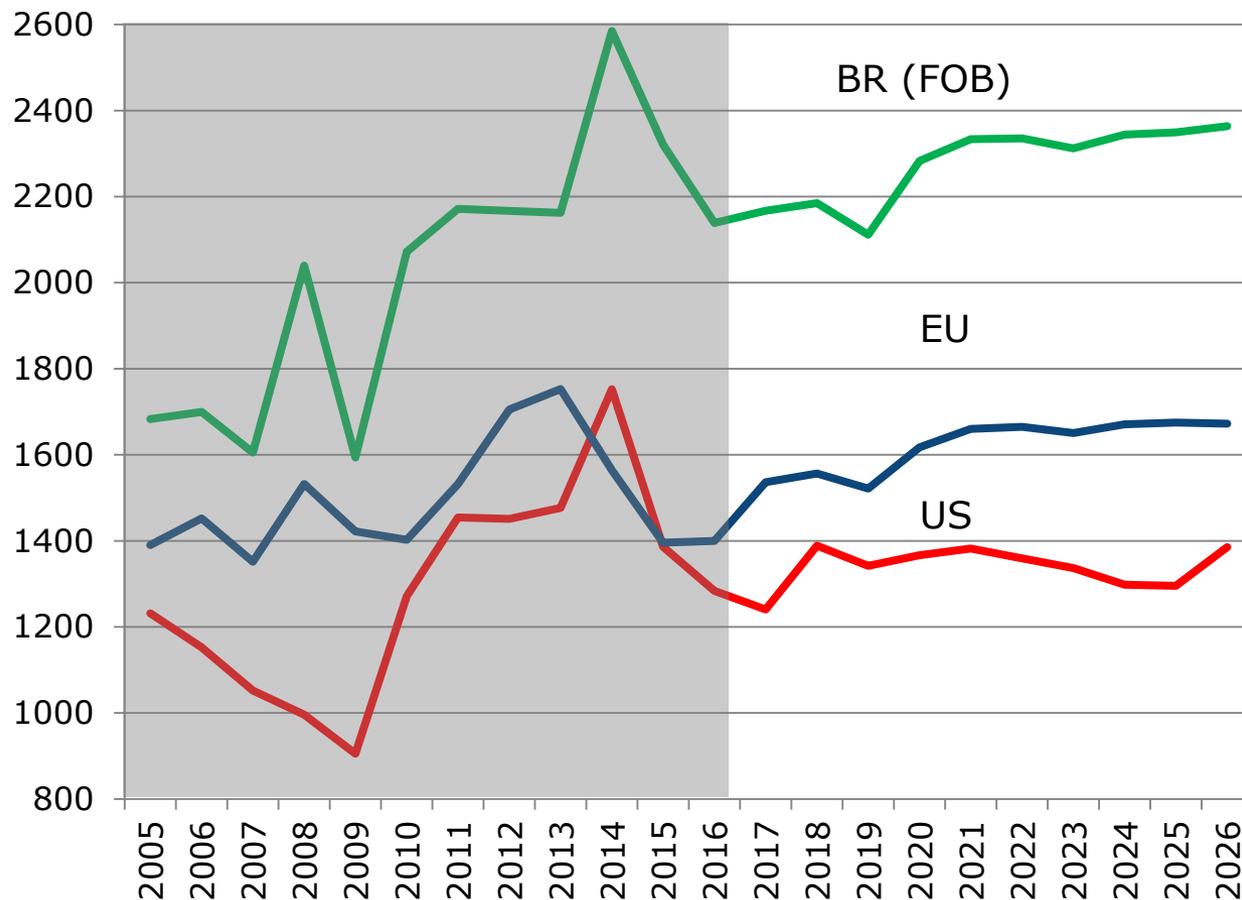
Note: price projections in nominal terms

Source: DG Agriculture and Rural Development (final baseline) and OECD-FAO Outlook 2016-2025





World pigmeat prices (EUR/t)



Main drivers:

- EU sow herd
- EU consumption
- World pork price

Note: price projections in nominal terms

Source: DG Agriculture and Rural Development (final baseline) and OECD-FAO Outlook 2016-2025

Take away messages



Meat consumption: EU-15= stable; EU-N13= catching up

Different pattern by meat type



Increasing world meat demand, especially for poultry and beef



Minor increase in EU meat production (200 000 tonnes by 2026, compared to high 2016 level)

88-95% of production to EU consumer

EU prospects report and data available at:

http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/index_en.htm

OECD-FAO Outlook at:

<http://www.agri-outlook.org/>

Short term outlook at:

http://ec.europa.eu/agriculture/markets-and-prices/short-term-outlook/index_en.htm

Ecampa at:

<https://ec.europa.eu/jrc/en/publication/eur-scientific-economic-assessment-ghg-mitigation-policy-options-eu-agriculture-ecampa-2>

Thanks