



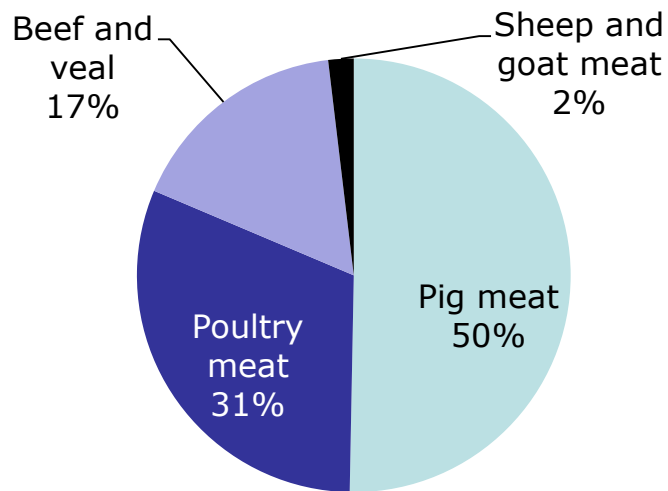
# **Structure of the EU meat supply chain and 2 examples: Beef and pigmeat markets**

# The EU meat supply chain

# EU meat net production (Tonnes carcass weight)

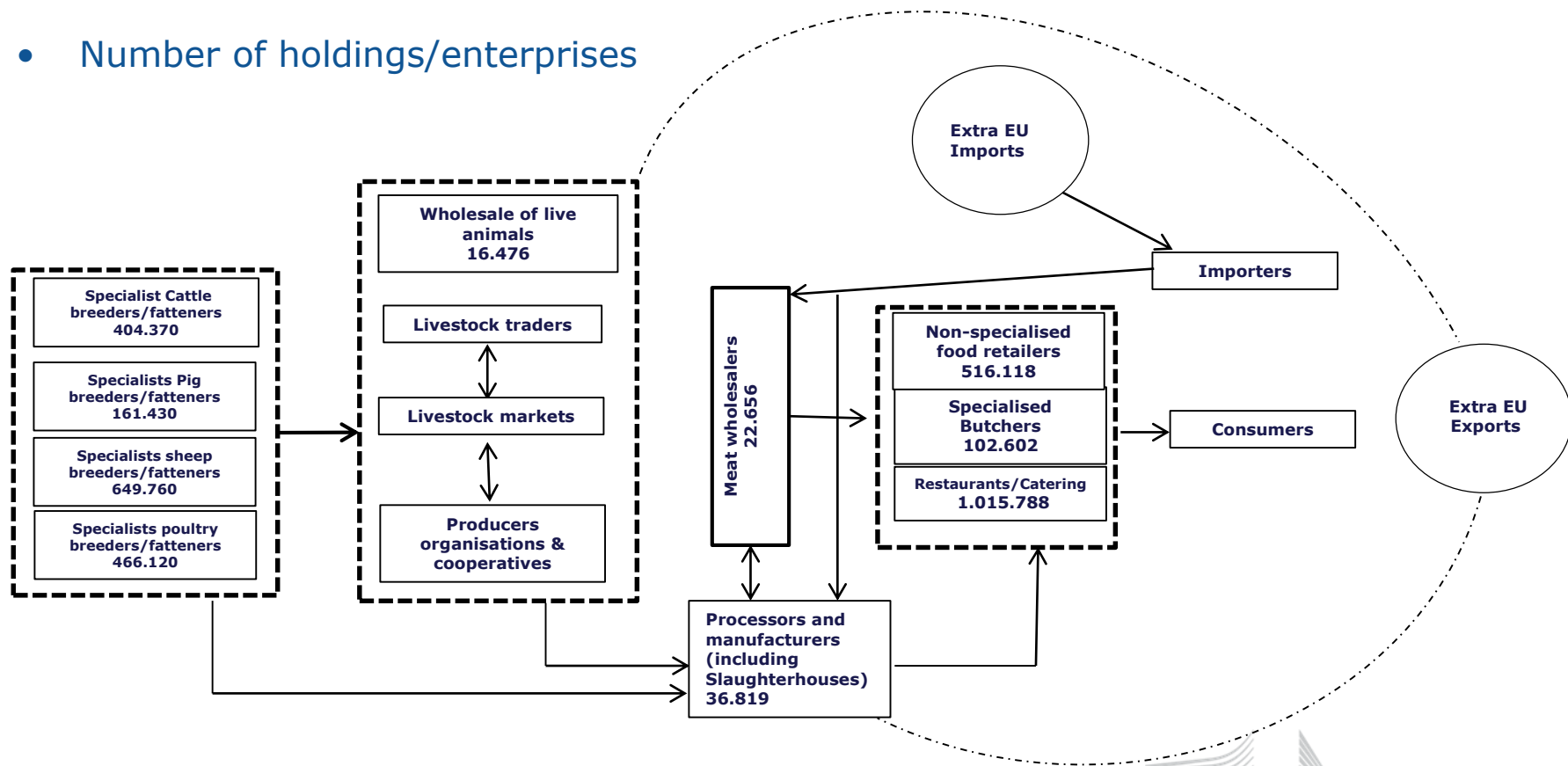
## 2017

- Beef and veal: 7,9 Million t
- Pigmeat: 23,7 Million t
- Sheep and goats meat: 0,9 Million t
- Poultrymeat: 14,6 Million t
- Total: 47,1 Million t



# Structure of the EU meat value chain

- Number of holdings/enterprises

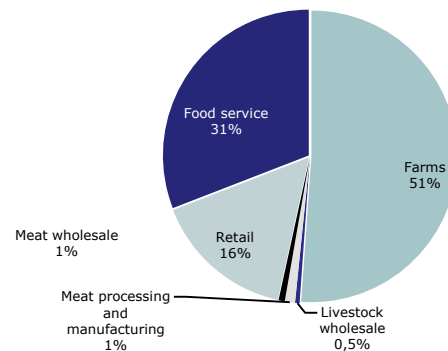


# Structure of the EU meat value chain

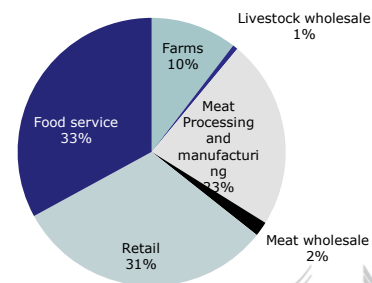
- Number of holdings/enterprises

| Meat supply chain stage             | Num. Farms/ enterprises | Output (Billion EUR) |
|-------------------------------------|-------------------------|----------------------|
| Farms                               | 1.681.680               | 94,8                 |
| Livestock wholesale                 | 16.476                  | 5,7                  |
| Meat processing and manufacturing   | 36.819                  | 208                  |
| Meat wholesale                      | 22.656                  | 16,1                 |
| Retail                              | 618.720                 | 286                  |
| Food service (restaurants/catering) | 1.015.788               | 300                  |

**Enterprises**



**Output**



# Number of EU farms

(Eurostat 2016: Farm indicators by agricultural area, type of farm, standard output, legal form and NUTS 2 regions [ef\_m\_farmleg])

## Farms: 1.681.680

- **Beef: 404.370**
- **Pigs: 161,430**
- **Sheep and goats: 649.760**
- **Poultry: 466.120**

## Output: 95 Billion EUR

- **Beef: 18,2 Billion EUR**
- **Pigs: 35,3 Billion EUR**
- **Sheep and goats: 15 Billion EUR**
- **Poultry: 26,4 Billion EUR**

Last update 28.06.18  
Extracted on 14.08.18  
Source of data Eurostat

LEG\_FORM Total  
SO\_EUR Total  
AGRAREA Total  
TIME 2016

| FARMTYPE      | Specialist cattle-rearing and fattening |                        | Sheep, goats and other grazing livestock |                        | Specialist pigs |                        | Specialist poultry |                        |
|---------------|-----------------------------------------|------------------------|------------------------------------------|------------------------|-----------------|------------------------|--------------------|------------------------|
| GEO/INDIC_AGR | Farm - number                           | Standard output - euro | Farm - number                            | Standard output - euro | Farm - number   | Standard output - euro | Farm - number      | Standard output - euro |
| BE            | 5.770                                   | 658.545.660            | 1.460                                    | 59.669.550             | 2.310           | 1.191.199.250          | 700                | 541.111.420            |
| BG            | 5.810                                   | 32.243.370             | 27.600                                   | 157.826.580            | 2.110           | 129.512.230            | 1.160              | 219.438.140            |
| CZ            | 3.790                                   | 182.904.630            | 4.180                                    | 39.921.280             | 150             | 205.211.610            | 180                | 358.373.210            |
| DK            | 3.340                                   | 192.709.150            | 3.420                                    | 78.394.490             | 2.250           | 4.085.755.920          | 250                | 278.306.790            |
| DE            | 27.950                                  | 1.732.098.650          | 26.010                                   | 625.835.540            | 13.080          | 5.865.871.610          | 2.940              | 2.487.483.950          |
| EE            | 1.040                                   | 32.542.550             | 1.540                                    | 16.685.130             | 50              | 43.343.370             | 90                 | 21.361.360             |
| IE            | 72.960                                  | 1.440.204.990          | 24.720                                   | 414.381.640            | 250             | 299.877.870            | 410                | 121.219.380            |
| EL            | 4.620                                   | 163.492.170            | 50.500                                   | 1.057.055.720          | 760             | 125.589.000            | 3.200              | 365.503.610            |
| ES            | 53.220                                  | 2.881.500.740          | 49.520                                   | 2.652.139.010          | 14.360          | 6.303.232.370          | 5.490              | 3.351.311.280          |
| FR            | 58.460                                  | 3.429.113.800          | 44.510                                   | 1.374.379.720          | 5.870           | 3.120.365.970          | 11.410             | 3.961.621.350          |
| HR            | 1.520                                   | 103.229.850            | 8.410                                    | 128.332.680            | 2.590           | 97.928.540             | 570                | 53.329.900             |
| IT            | 20.290                                  | 1.775.151.920          | 42.940                                   | 3.197.244.520          | 3.660           | 5.578.159.580          | 3.900              | 4.221.289.750          |
| CY            | 10                                      | 642.210                | 1.560                                    | 101.311.020            | 30              | 76.303.800             | 680                | 60.766.730             |
| LV            | 2.380                                   | 22.020.420             | 3.070                                    | 11.547.110             | 310             | 57.676.650             | 3.650              | 57.377.630             |
| LT            | 1.690                                   | 15.253.450             | 2.010                                    | 6.745.820              | 340             | 83.204.990             | 820                | 103.663.590            |
| LU            | 380                                     | 41.343.410             | 230                                      | 15.934.130             | 30              | 17.609.060             | 10                 | 3.621.390              |
| HU            | 2.280                                   | 69.488.430             | 19.170                                   | 80.499.070             | 31.390          | 389.583.240            | 56.360             | 930.735.180            |
| MT            | 60                                      | 433.630                | 1.050                                    | 7.211.930              | 80              | 7.937.320              | 120                | 10.181.800             |
| NL            | 5.760                                   | 851.840.520            | 5.260                                    | 378.041.230            | 3.110           | 2.751.650.050          | 1.460              | 1.672.422.790          |
| AT            | 20.600                                  | 400.715.720            | 15.730                                   | 203.967.070            | 4.000           | 690.144.630            | 1.470              | 321.883.700            |
| PL            | 17.690                                  | 312.840.360            | 20.430                                   | 166.593.980            | 12.540          | 1.633.177.230          | 13.310             | 2.854.760.860          |
| PT            | 17.660                                  | 547.869.730            | 20.600                                   | 285.897.810            | 1.510           | 290.668.300            | 1.490              | 330.221.260            |
| RO            | 14.970                                  | 85.522.120             | 191.610                                  | 1.367.322.590          | 57.320          | 534.315.300            | 352.370            | 429.398.220            |
| SI            | 13.040                                  | 137.260.460            | 4.400                                    | 23.665.980             | 110             | 12.820.120             | 240                | 79.551.520             |
| SK            | 1.760                                   | 55.713.560             | 2.250                                    | 39.952.590             | 340             | 75.847.870             | 110                | 165.609.800            |
| FI            | 2.920                                   | 228.368.350            | 2.500                                    | 61.763.210             | 720             | 263.731.930            | 340                | 189.335.090            |
| SE            | 10.330                                  | 684.137.240            | 14.650                                   | 177.088.160            | 500             | 393.044.470            | 270                | 383.054.510            |
| UK            | 34.070                                  | 2.085.405.780          | 60.430                                   | 2.304.419.720          | 1.660           | 982.883.240            | 3.120              | 2.816.617.790          |

# Number of EU wholesalers

Last update 10.08.18  
 Extracted on 13.08.18  
 Source of data Eurostat

TIME 2015

(Eurostat 2015: Annual detailed enterprise statistics for trade (NACE Rev. 2 G) [sbs\_na\_dt\_r2])

- Wholesale of live animals:
  - Enterprises: 16.476**
  - Output: 5,7 Billion EUR**
- Wholesale of meat and meat products:
  - Enterprises: 22.656**
  - Output: 16,1 Billion EUR**

| NACE_R2<br>GEO/INDIC_SB | Wholesale of live animals |                                 | Wholesale of meat and meat products |                                 |
|-------------------------|---------------------------|---------------------------------|-------------------------------------|---------------------------------|
|                         | Enterprises - number      | Production value - million euro | Enterprises - number                | Production value - million euro |
| EU28                    | 16.476                    | 5.659                           | 22.656                              | 16.098                          |
| BE                      | 1.265                     | 244,0                           | 758                                 | 636,8                           |
| BG                      | 49                        | 6,6                             | 462                                 | 88,8                            |
| CZ                      | :                         | :                               | :                                   | :                               |
| DK                      | 83                        | 143,8                           | 182                                 | 298,2                           |
| DE                      | 2.529                     | 1.555,8                         | 1.783                               | 2.636,1                         |
| EE                      | 17                        | :                               | 63                                  | 7,1                             |
| IE                      | :                         | :                               | :                                   | :                               |
| EL                      | 261                       | 30,9                            | 1.106                               | 450,7                           |
| ES                      | 2.309                     | 348,8                           | 5.117                               | 1.472,8                         |
| FR                      | 1.960                     | 1.515,7                         | 1.134                               | 1.697,9                         |
| HR                      | 48                        | 6,5                             | 80                                  | 12,6                            |
| IT                      | 1.333                     | 258,6                           | 3.359                               | 2.319,1                         |
| CY                      | 5                         | 0,5                             | 51                                  | 11,7                            |
| LV                      | 26                        | 7,9                             | 120                                 | 42,2                            |
| LT                      | 87                        | 13,3                            | 132                                 | 35,3                            |
| LU                      | 49                        | :                               | 15                                  | 6,9                             |
| HU                      | 398                       | 127,0                           | 547                                 | 208,1                           |
| MT                      | :                         | :                               | 33                                  | 21,3                            |
| NL                      | 1.752                     | :                               | 1.301                               | :                               |
| AT                      | 344                       | 85,5                            | 228                                 | 514,5                           |
| PL                      | 1.472                     | 262,3                           | 1.467                               | 714,6                           |
| PT                      | 765                       | 207,4                           | 794                                 | 192,7                           |
| RO                      | 178                       | 118,4                           | 603                                 | 241,0                           |
| SI                      | 27                        | 6,5                             | 51                                  | 14,4                            |
| SK                      | 53                        | 14,2                            | 39                                  | 16,1                            |
| FI                      | 22                        | 28,2                            | 51                                  | 19,9                            |
| SE                      | 212                       | 19,0                            | 233                                 | 102,4                           |
| UK                      | 436                       | 113,4                           | 2.153                               | 2.407,0                         |

# Number of EU meat processors and manufacturers

(Eurostat 2016: Annual detailed enterprise statistics for industry (NACE Rev. 2, B-E) [sbs\_na\_ind\_r2])

- Processing and preserving of meat and production of meat products:
  - Enterprises: 36.819**
  - Output: 208 Billion EUR**

Last update 10.08.18  
Extracted on 14.08.18  
Source of data Eurostat

NACE\_R2 Processing and preserving of meat and production of meat products  
TIME 2016

| GEO/INDIC_SB | Enterprises | Production value - million euro |
|--------------|-------------|---------------------------------|
| EU28         | 36.819      | 208.000                         |
| BE           | 706         | 6.971,9                         |
| BG           | 497         | 1.061,4                         |
| CZ           | 1.918       | 2.235,4                         |
| DK           | 142         | 5.612,4                         |
| DE           | 8.925       | 43.031,8                        |
| EE           | 70          | 303,4                           |
| IE           | 241         | 5.488,7                         |
| EL           | 442         | 1.294,9                         |
| ES           | 3.714       | 23.591,0                        |
| FR           | 6.392       | 32.481,4                        |
| HR           | 324         | 970,1                           |
| IT           | :           | 22.772,2                        |
| CY           | 61          | 259,1                           |
| LV           | 166         | 339,2                           |
| LT           | 222         | 563,4                           |
| LU           | 19          | 135,6                           |
| HU           | 614         | 2.543,8                         |
| MT           | :           | :                               |
| NL           | 621         | 10.424,8                        |
| AT           | 937         | 4.117,8                         |
| PL           | 2.683       | 14.382,9                        |
| PT           | 678         | 2.123,5                         |
| RO           | 800         | 2.432,5                         |
| SI           | 333         | 579,6                           |
| SK           | 374         | 637,5                           |
| FI           | 212         | 2.397,4                         |
| SE           | 551         | 4.030,9                         |
| UK           | 1.014       | 21.530,0                        |



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# Number of EU Retailers

(Eurostat 2015: Annual detailed enterprise statistics for trade (NACE Rev. 2 G) [sbs\_na\_dt\_r2])

Last update 10.08.18  
 Extracted on 14.08.18  
 Source of data Eurostat  
 TIME 2015

- Number of retailers: **618.720**
  - Non-specialised food retailers (stores, stalls and markets): 516.118**
  - Specialised (butchers): 102.602**
- Output: 286 Billion EUR
  - Non-specialised food retailers (stores, stalls and markets): 273,8 Billion EUR**
  - Specialised (butchers): 12,3 Billion EUR**

| NACE_R2      | Retail sale in non-specialised stores with food, beverages or tobacco predominating |                                 | Retail sale of meat and meat products in specialised stores |                                 | Retail sale via stalls and markets of food, beverages and tobacco products |                                 |
|--------------|-------------------------------------------------------------------------------------|---------------------------------|-------------------------------------------------------------|---------------------------------|----------------------------------------------------------------------------|---------------------------------|
| GEO/INDIC_SB | Enterprises - number                                                                | Production value - million euro | Enterprises - number                                        | Production value - million euro | Enterprises - number                                                       | Production value - million euro |
| EU28         | 408.497                                                                             | 270.000                         | 102.602                                                     | 12.359                          | 107.621                                                                    | 3.752                           |
| BE           | 7.643                                                                               | 8.489,7                         | 3.396                                                       | 992,9                           | 2.219                                                                      | 169,8                           |
| BG           | 19.951                                                                              | 842,3                           | 724                                                         | 18,0                            | 982                                                                        | 3,9                             |
| CZ           | 40.972                                                                              | 3.880,2                         | 1.118                                                       | 107,1                           | :                                                                          | :                               |
| DK           | 1.991                                                                               | :                               | 427                                                         | 204,5                           | 43                                                                         | 6,2                             |
| DE           | 27.217                                                                              | 52.193,3                        | 3.470                                                       | 1.123,4                         | 3.753                                                                      | 432,7                           |
| EE           | 418                                                                                 | 459,8                           | 36                                                          | :                               | 127                                                                        | 12,0                            |
| IE           | 3.858                                                                               | 4.087,7                         | 1.133                                                       | 202,4                           | :                                                                          | :                               |
| EL           | 17.813                                                                              | 2.993,8                         | 6.789                                                       | 199,3                           | 4.041                                                                      | 13,8                            |
| ES           | 39.702                                                                              | 19.013,2                        | 25.604                                                      | 1.453,7                         | :                                                                          | :                               |
| FR           | 29.452                                                                              | 41.261,4                        | 13.614                                                      | 2.708,3                         | 24.990                                                                     | 1.142,4                         |
| HR           | 2.234                                                                               | 1.577,7                         | 311                                                         | 19,8                            | 755                                                                        | 7,2                             |
| IT           | 43.805                                                                              | 28.381,4                        | 24.976                                                      | 1.681,4                         | 26.228                                                                     | 926,0                           |
| CY           | 1.769                                                                               | 422,8                           | 324                                                         | 38,1                            | 24                                                                         | 0,7                             |
| LV           | 1.648                                                                               | 605,9                           | 167                                                         | 10,0                            | 496                                                                        | 10,0                            |
| LT           | 2.488                                                                               | 855,6                           | 81                                                          | 8,9                             | 6.643                                                                      | 32,7                            |
| LU           | 208                                                                                 | 678,6                           | 79                                                          | 61,7                            | 25                                                                         | 2,5                             |
| HU           | 12.140                                                                              | 2.411,2                         | 1.415                                                       | 70,5                            | 1.136                                                                      | 9,4                             |
| MT           | 648                                                                                 | 148,9                           | :                                                           | :                               | :                                                                          | :                               |
| NL           | 3.322                                                                               | 9.116,2                         | 2.322                                                       | :                               | 4.210                                                                      | :                               |
| AT           | 3.343                                                                               | 6.390,9                         | 273                                                         | 94,5                            | 334                                                                        | 23,8                            |
| PL           | 52.013                                                                              | 7.911,7                         | 3.600                                                       | 367,9                           | 8.890                                                                      | 103,0                           |
| PT           | 15.051                                                                              | 4.036,6                         | 4.836                                                       | 275,7                           | 5.491                                                                      | 34,0                            |
| RO           | 40.835                                                                              | 3.227,8                         | 1.013                                                       | 79,6                            | 1.447                                                                      | 17,0                            |
| SI           | 586                                                                                 | 1.088,7                         | 148                                                         | 27,5                            | 119                                                                        | 2,4                             |
| SK           | 1.644                                                                               | 873,0                           | 297                                                         | 49,7                            | 166                                                                        | 5,5                             |
| FI           | 2.436                                                                               | 4.673,1                         | 75                                                          | 12,9                            | 185                                                                        | 9,1                             |
| SE           | 5.461                                                                               | 6.374,7                         | 223                                                         | 33,1                            | 776                                                                        | 30,3                            |
| UK           | 29.849                                                                              | 56.500,4                        | 5.876                                                       | 1.947,8                         | 1.008                                                                      | 133,1                           |

# Number of EU Restaurants/Catering Services

(Eurostat 2015: Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs\_na\_1a\_se\_r2])

- Number of enterprises-Restaurants and food service activities: **1.018.788**
  - Restaurants and mobile food service activities: **930.300**
  - Event catering activities: **55.346**
  - Other food service activities: **33.142**
- Output: approx. **300 Billion EUR**

Last update 10.08.18  
Extracted on 14.08.18  
Source of data Eurostat

TIME 2015

| NACE_R2<br>GEO/INDIC_SB | Restaurants and mobile food service activities |                                 | Event catering activities |                                 | Other food service activities |                                 |
|-------------------------|------------------------------------------------|---------------------------------|---------------------------|---------------------------------|-------------------------------|---------------------------------|
|                         | Enterprises - number                           | Production value - million euro | Enterprises - number      | Production value - million euro | Enterprises - number          | Production value - million euro |
| EU28                    | 930.300                                        | 247.270                         | 55.346                    | :                               | 33.142                        | 41.626                          |
| BE                      | 28.606                                         | 7.794,1                         | 3.777                     | 1.092,1                         | 238                           | 1.016,2                         |
| BG                      | 10.861                                         | 550,4                           | 96                        | 13,7                            | 557                           | 63,6                            |
| CZ                      | 47.336                                         | 2.727,7                         | :                         | :                               | :                             | :                               |
| DK                      | 8.255                                          | 3.529,6                         | 689                       | 254,3                           | 914                           | 793,9                           |
| DE                      | 131.845                                        | 39.290,9                        | 4.918                     | 1.979,3                         | 10.436                        | 8.869,5                         |
| EE                      | 1.485                                          | 402,9                           | 134                       | 15,8                            | 173                           | 35,0                            |
| IE                      | 7.315                                          | 2.245,8                         | 628                       | 256,1                           | :                             | :                               |
| EL                      | 44.201                                         | 2.118,7                         | 491                       | 75,1                            | 3.247                         | 148,2                           |
| ES                      | 66.168                                         | 20.271,6                        | :                         | :                               | :                             | :                               |
| FR                      | 165.004                                        | 50.482,1                        | 10.391                    | 1.967,8                         | 737                           | 8.641,8                         |
| HR                      | 6.407                                          | 782,4                           | 168                       | 18,3                            | 89                            | 7,0                             |
| IT                      | 144.959                                        | 30.829,1                        | 2.490                     | 920,8                           | 1.476                         | 5.997,7                         |
| CY                      | 2.897                                          | 723,6                           | 38                        | 8,0                             | 554                           | 44,1                            |
| LV                      | 2.240                                          | 439,3                           | 58                        | 4,8                             | 308                           | 54,8                            |
| LT                      | 2.381                                          | 427,3                           | 0                         | 0,0                             | 414                           | 49,1                            |
| LU                      | 1.382                                          | 741,2                           | 27                        | 27,0                            | 24                            | 193,5                           |
| HU                      | 16.264                                         | 1.310,2                         | 302                       | 19,7                            | 1.722                         | 297,1                           |
| MT                      | 1.053                                          | 263,5                           | :                         | :                               | :                             | :                               |
| NL                      | 27.722                                         | 10.299,1                        | 7.740                     | :                               | 1.245                         | :                               |
| AT                      | 27.677                                         | 7.818,8                         | 400                       | 213,9                           | 387                           | 564,3                           |
| PL                      | 28.378                                         | 3.428,0                         | 3.290                     | 351,7                           | 1.869                         | 188,4                           |
| PT                      | 29.115                                         | 3.684,9                         | 456                       | 51,6                            | 678                           | 585,7                           |
| RO                      | 9.340                                          | 1.693,7                         | 695                       | 76,3                            | 371                           | 123,6                           |
| SI                      | 4.393                                          | 691,1                           | 611                       | 23,8                            | 122                           | 59,9                            |
| SK                      | 10.194                                         | 610,5                           | 259                       | 31,7                            | 435                           | 122,3                           |
| FI                      | 7.642                                          | 3.590,0                         | 796                       | 119,8                           | 379                           | 743,5                           |
| SE                      | 24.370                                         | 9.791,4                         | 1.568                     | 220,6                           | 199                           | 357,0                           |
| UK                      | 72.810                                         | 40.732,0                        | 6.906                     | 4.515,0                         | 1.848                         | 7.865,7                         |



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# Two examples

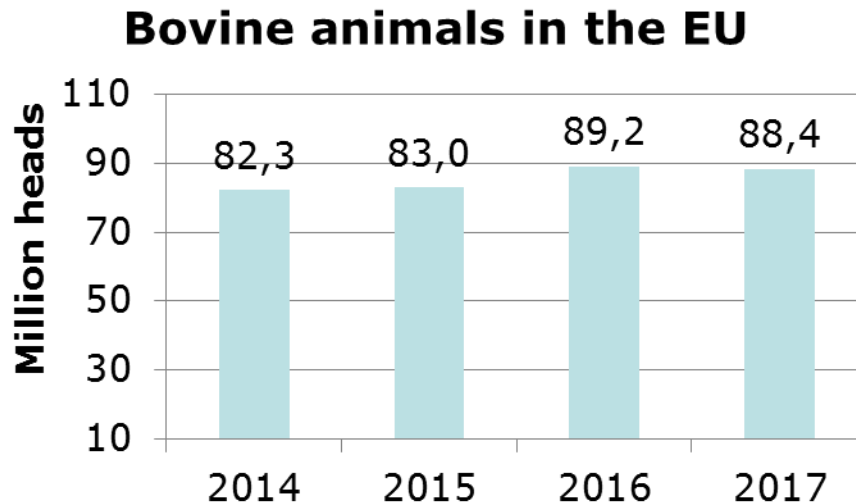
- EU beef and veal market
- EU pigmeat market

# Beef and veal market structure

# EU Bovine livestock

- Total EU bovine livestock in 2017:
  - **88,4 million heads**

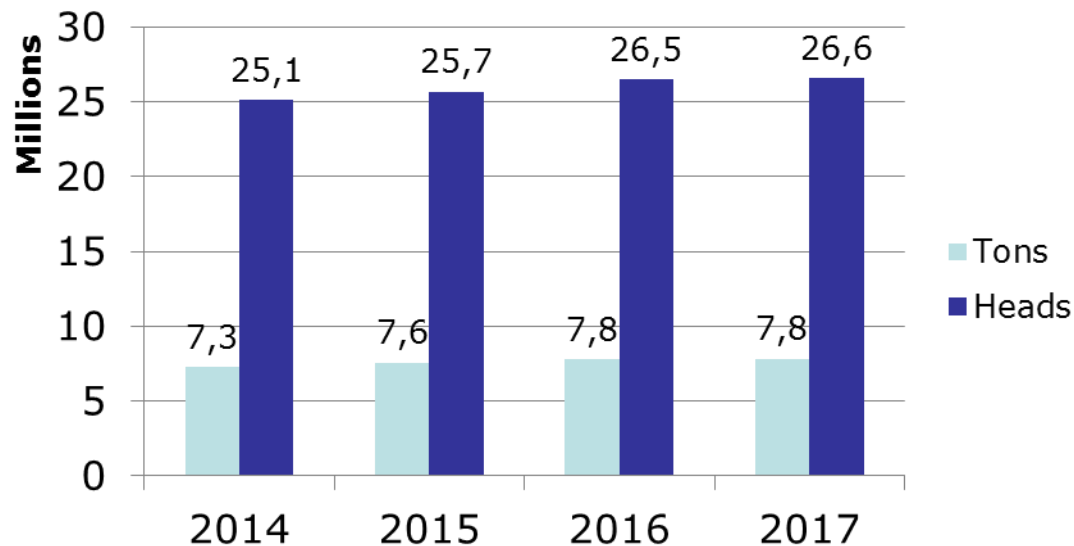
| Member State | EU share |
|--------------|----------|
| FR           | 21%      |
| DE           | 14%      |
| UK           | 11%      |
| IE           | 8%       |
| ES           | 7%       |
| IT           | 7%       |
| PL           | 7%       |
| NL           | 5%       |
| Others       | 21%      |



# EU beef and veal production

- Total EU production (slaughterings) in 2017:
- **25 million heads**
- **7,3 Million tons**

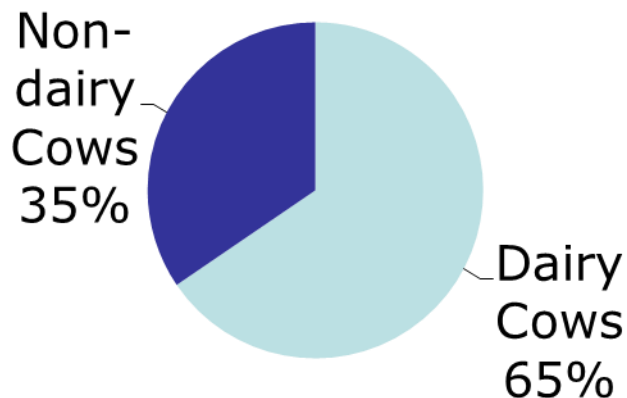
| Member State | EU share |
|--------------|----------|
| FR           | 18%      |
| DE           | 14%      |
| UK           | 12%      |
| IT           | 10%      |
| ES           | 8%       |
| IE           | 8%       |
| PL           | 7%       |
| NL           | 6%       |
| Others       | 17%      |



# Structure of EU beef and veal production

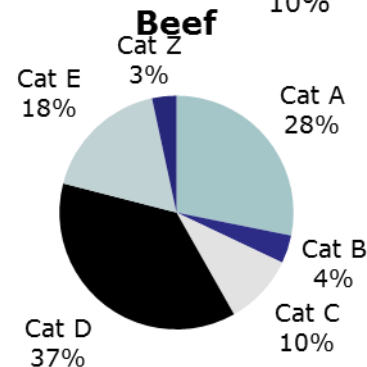
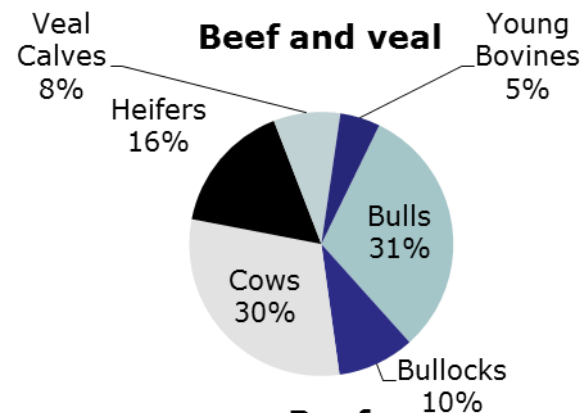
2 thirds of animals intended for beef and veal production comes from dairy herds...

## Cows in the EU



# Structure of EU beef and veal production

| Category (compulsory)                       | Animals                                 | Denomination |
|---------------------------------------------|-----------------------------------------|--------------|
| V (compulsory labelling)                    | Calves of less than 8 months            | "Veal"       |
| Z (compulsory labelling and classification) | Young bovines between 8-12 months       | "Beef"       |
| A (classification)                          | Bulls from 12 to 24 months              |              |
| B (classification)                          | Bulls from 24 months                    |              |
| C (classification)                          | Bullocks from 12 months                 |              |
| D (classification)                          | Cows (female animals that have calved)  |              |
| E (classification)                          | Heifers (female animals from 12 months) |              |

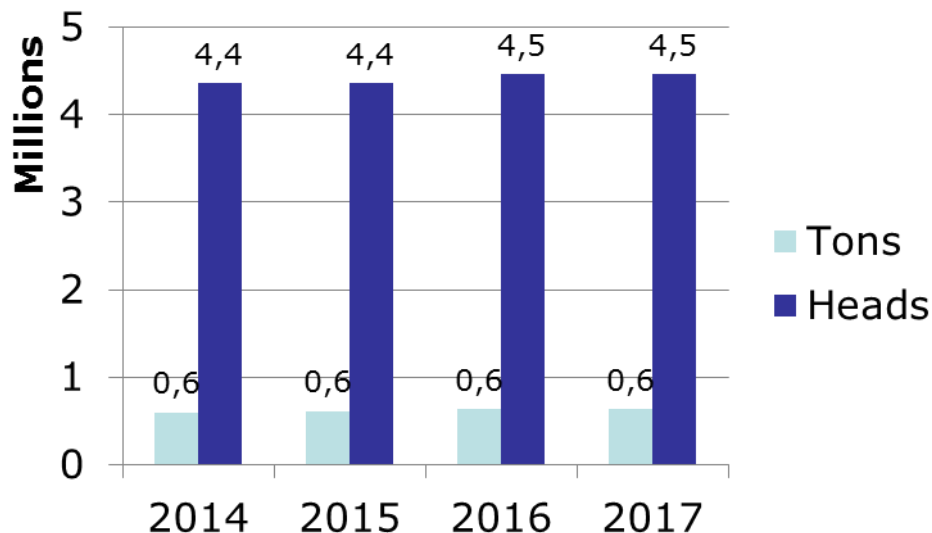




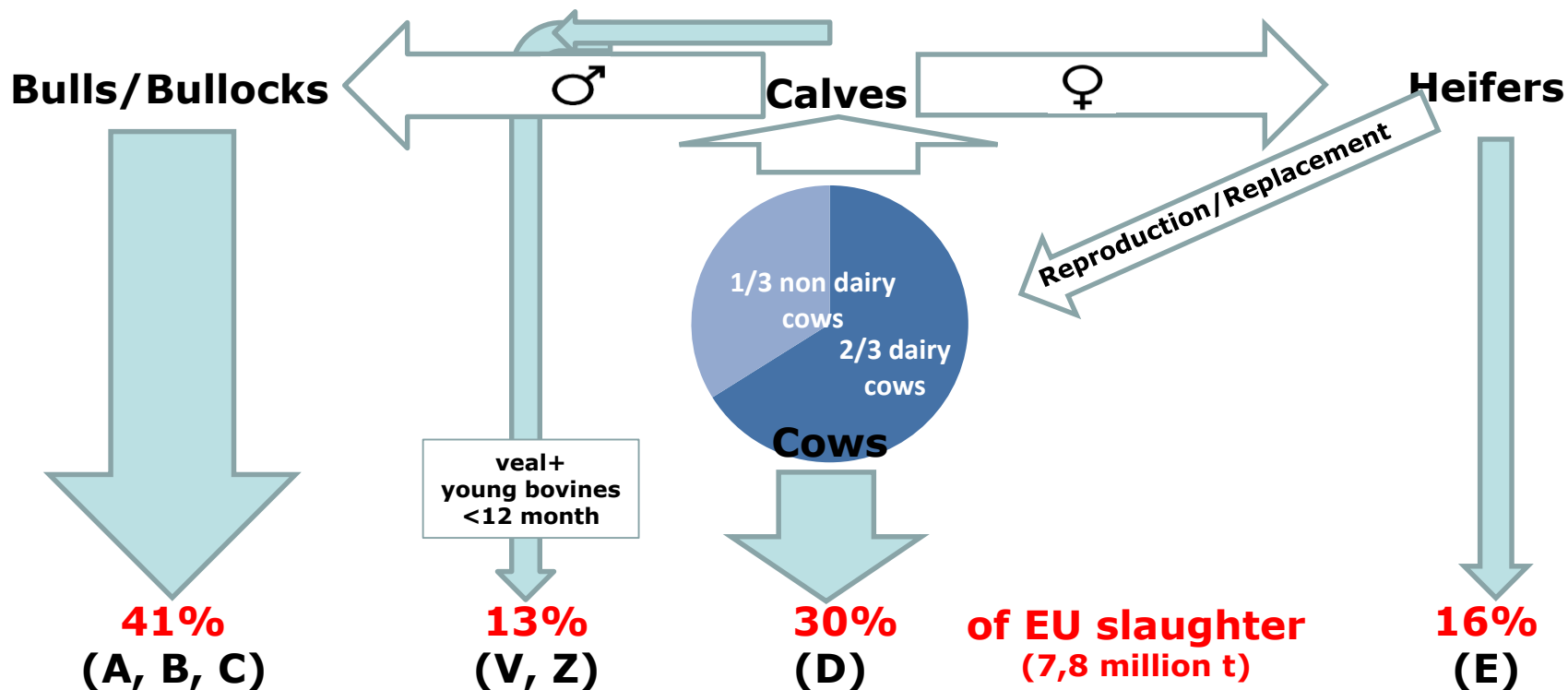
# EU veal production

- Total EU veal production (slaughterings) in 2017:
  - 4,5 million heads
  - 0,6 Million tons

|        |     |
|--------|-----|
| NL     | 33% |
| FR     | 28% |
| IT     | 15% |
| BE     | 10% |
| DE     | 8%  |
| ES     | 2%  |
| Others | 5%  |



# Structure of EU beef and veal production



# EU beef production systems:

- 'Breeder' are farmers with suckler cows not fattening their calves,
- 'Breeder & fatter' fatten the calves born on their farms
- 'Fatter' purchase young calves (mostly males) and then finish fattening them.

# Fattening systems

|                                                                                                                       |                                                                                                                       |                                                                                                                    |                                                                                                                                |                                                                                                                     |
|-----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| <b>Milk &amp; milk replacers</b><br> | <b>Milk replacers &amp; feed</b><br> | <b>Intensive (grain-fed)</b><br> | <b>Semi-intensive (grain-grass fed)</b><br> | <b>Extensive (grass-fed)</b><br> |
| Less than 8 months                                                                                                    | From 8 to less than 12 months                                                                                         | 12-14 months                                                                                                       | 15-20 months                                                                                                                   | Over 20 months                                                                                                      |

|                    | "Veal"            |                  | "Beef"                   |                  |                    |                  |                     |                  |                    |                  |                 |                  |
|--------------------|-------------------|------------------|--------------------------|------------------|--------------------|------------------|---------------------|------------------|--------------------|------------------|-----------------|------------------|
|                    | <i>Calves (V)</i> |                  | <i>Young bovines (Z)</i> |                  | <i>Bulls (A+B)</i> |                  | <i>Bullocks (C)</i> |                  | <i>Heifers (E)</i> |                  | <i>Cows (D)</i> |                  |
| Breed              | Age (m)           | Weight (Kg live) | Age (m)                  | Weight (Kg live) | Age (m)            | Weight (Kg live) | Age (m)             | Weight (Kg live) | Age (m)            | Weight (Kg live) | Age (m)         | Weight (Kg live) |
| Dairy type         | Less 8 monts      | 240-260          | 8-less 12 months         | 380              | 12-14              | 650              | 15-18               | 650              |                    |                  |                 |                  |
| Mixed or meat type |                   |                  | 8-less 12 months         | 380-400          | 12-14              | 650-700          | 18-over 20          | 650-700          | 18-24              | 550-600          | Over 24         | 560-660          |

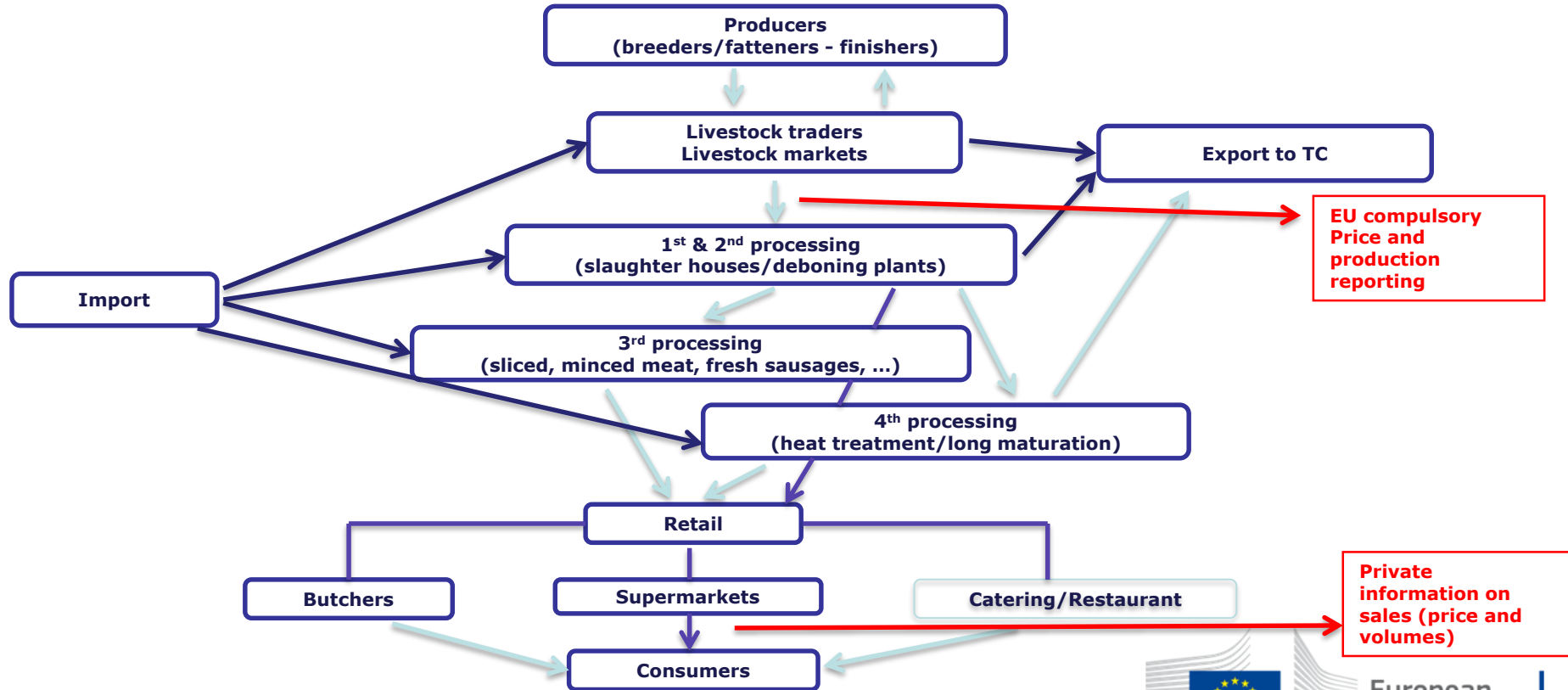
Disclaimer: The figures and models are indicative and displayed as examples. They are not exhaustive and they do not necessarily reflect all the existing systems in the EU



# Main Actors beef supply chain

- *Producers:*
  - **Breeders**
  - **Breeders & fatteners**
  - **Fatteners**
- *Traders:*
  - **Livestock traders**
  - **Livestock markets**
  - **Producers organisations & cooperatives**
- *1st and 2nd Processing (slaughter/deboning):*
  - **Slaughterhouses**
  - **Cutting plants**
- *3rd and 4th Processing (slicing, minced meat, fresh sausages, heat treatment, long maturation,...)*
  - **Meat industry**
  - **Butchers**
- *Retail :*
  - **Butchers**
  - **Big Surfaces: Supermarkets, Discounts...**
  - **Consumption out of households: Restaurants, Catering...**

# Structure of the EU beef market



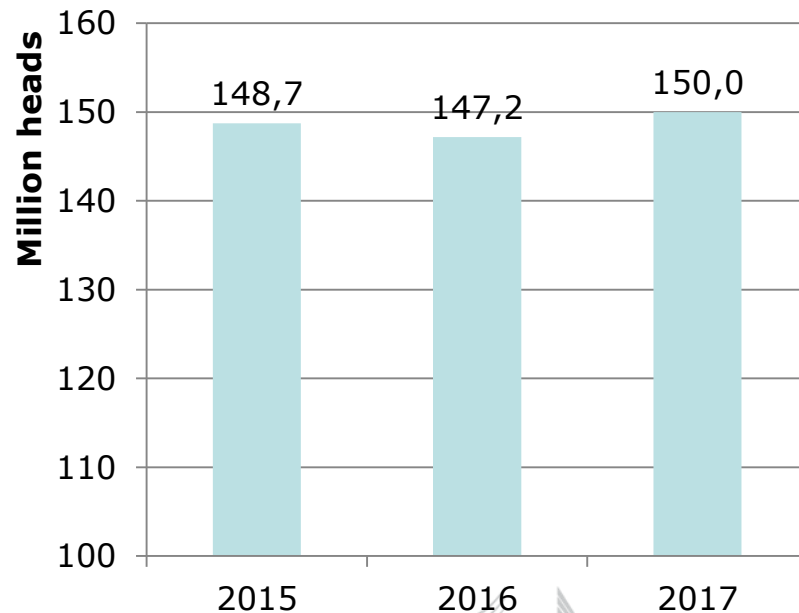
# Pigmeat market structure

# EU pig livestock

- Total EU pig livestock in 2017:
  - **150 million heads**

| Member State | EU share |
|--------------|----------|
| ES           | 22%      |
| DE           | 20%      |
| FR           | 10%      |
| DK           | 9%       |
| NL           | 9%       |
| PL           | 9%       |
| IT           | 6%       |
| Others       | 24%      |

**EU pig population**

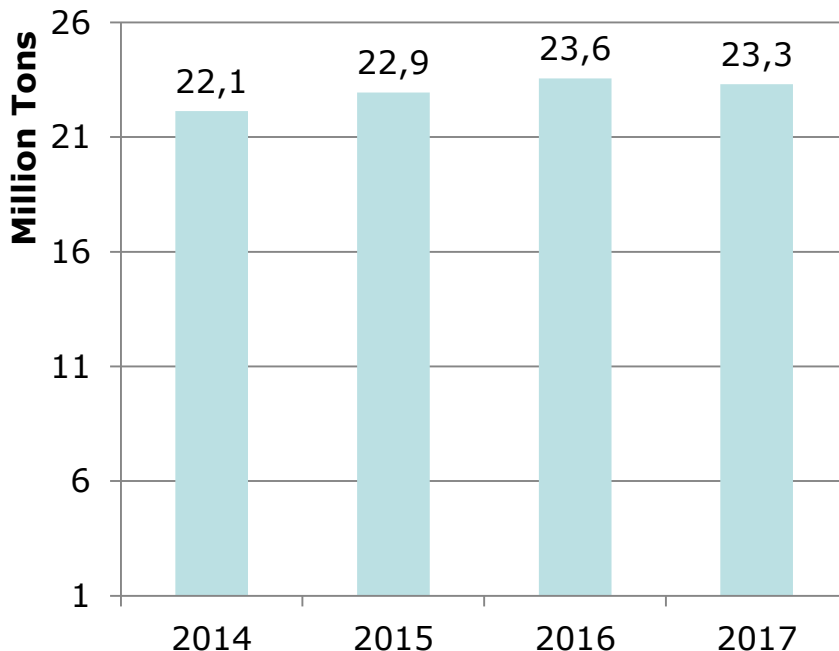




# EU pigmeat production

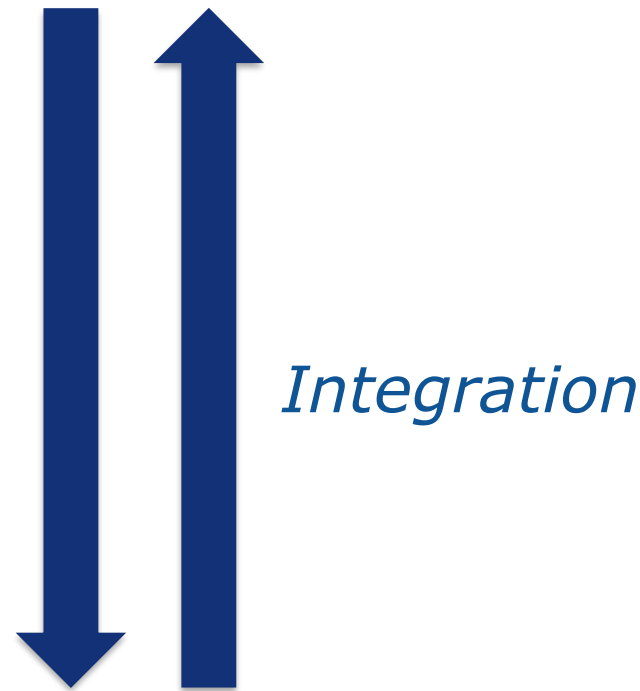
- Total EU production (slaughterings) in 2017:
- **254,7 million heads**
- **23,3 Million tons**

| Member State | EU share |
|--------------|----------|
| DE           | 21%      |
| ES           | 17%      |
| FR           | 9%       |
| PL           | 8%       |
| DK           | 6%       |
| IT           | 6%       |
| NL           | 6%       |
| Others       | 20%      |



# Main Actors pigmeat supply chain

- *Animal feed industry*
- *Producers:*
  - **Breeding farms (Mothers)**
  - **Piglets**
  - **Fatteners**
- *1st Processing:*
  - **Slaughterhouses/Cutting plants**
- *2<sup>nd</sup> and 3<sup>rd</sup> Processing:*
  - **Meat industry**
  - **Butchers**
- *Retail :*
  - **Butchers**
  - **Big Surfaces: Supermarkets, Discounts...**
  - **Consumption out of households: Restaurants, Catering...**

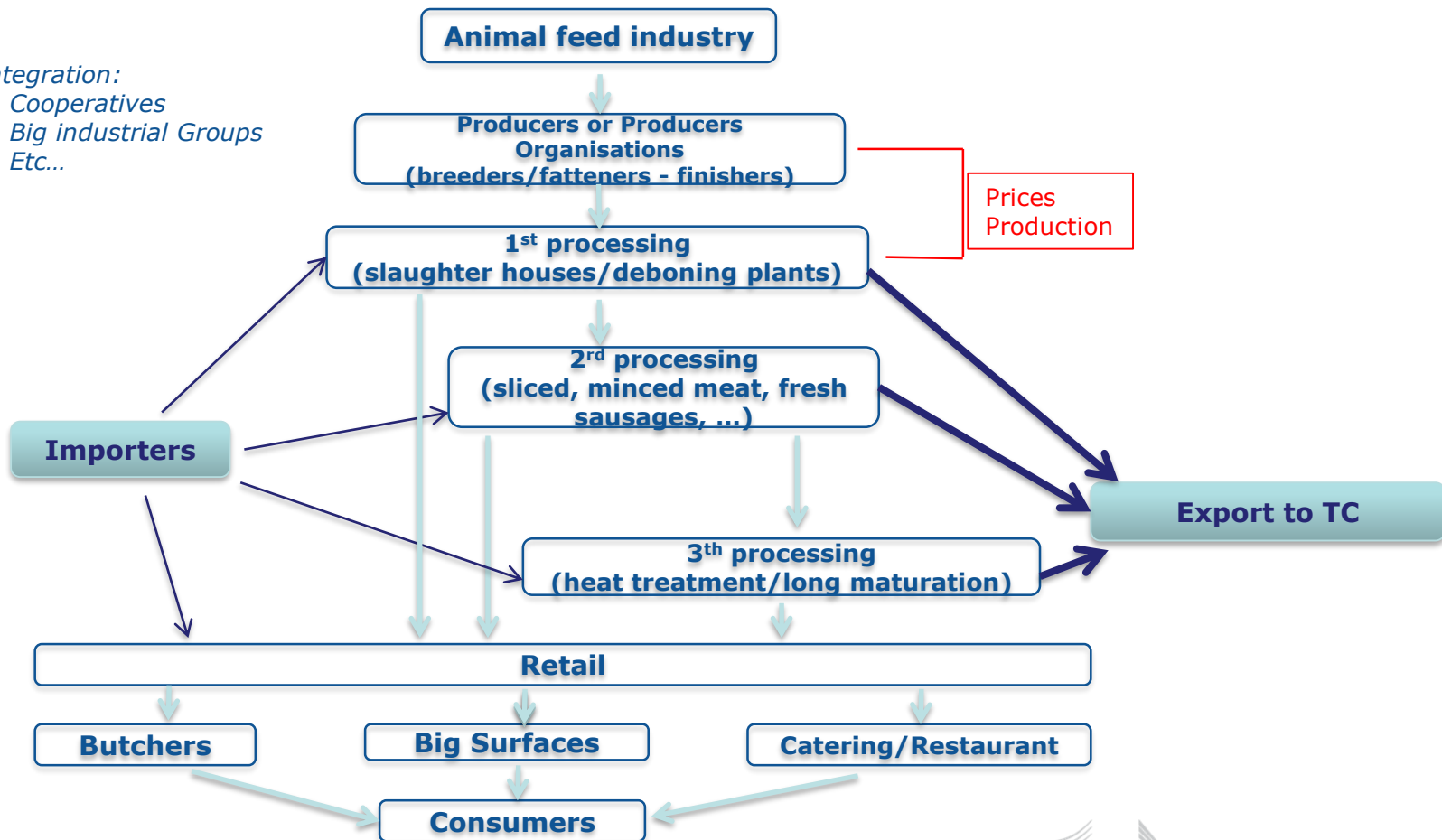


European  
Commission



*Integration:*

- Cooperatives
- Big industrial Groups
- Etc...



European  
Commission