

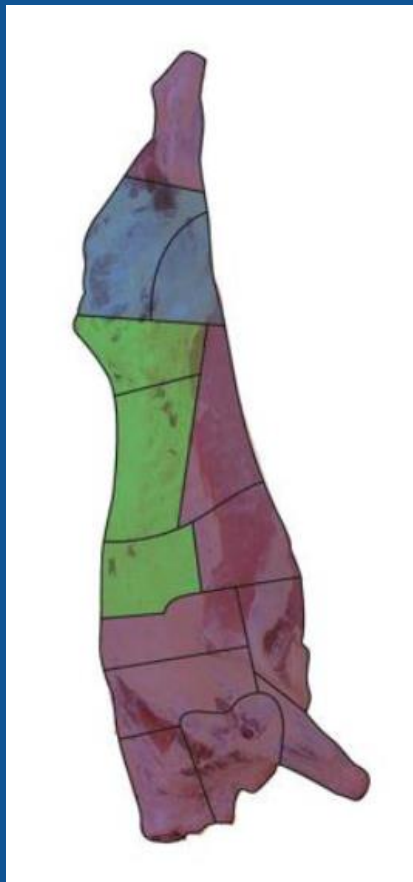


Estimation of bovine and pig production pattern and consumption in EU using SEUROP grid.



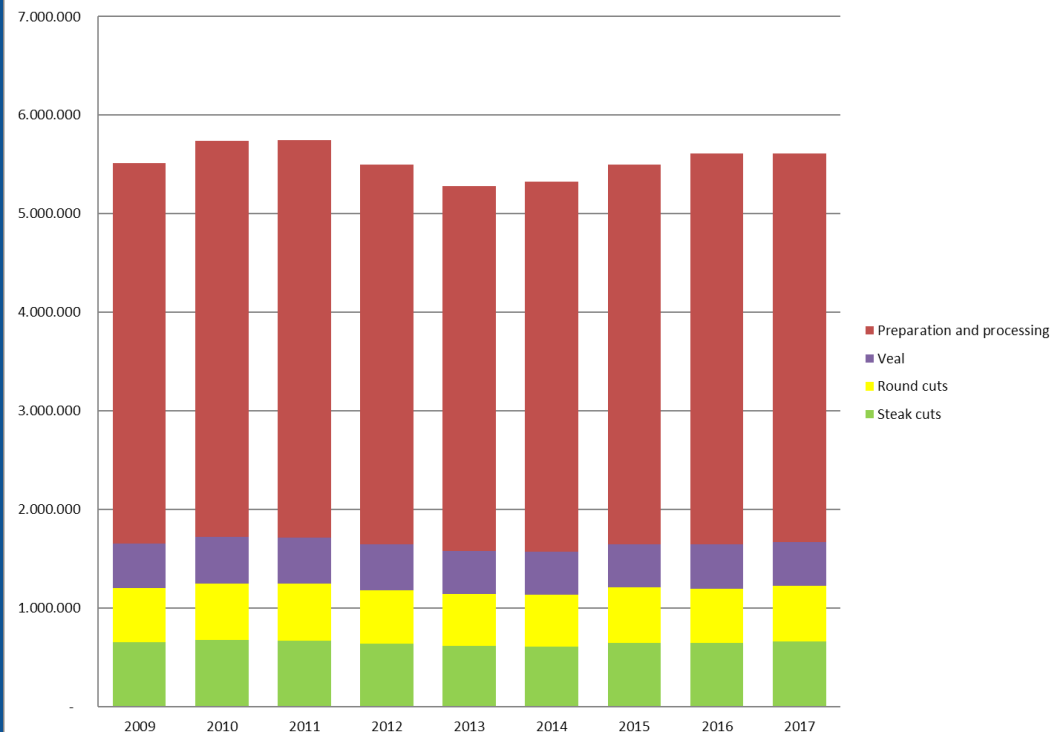
BEEF AND VEAL

New cuts definitions



- **Steak cuts:** sirloin, fillet, rump, rump tail, forerib (only from animals with conformation E-U-R and 1/3 of O)
- **Round cuts:** silverside and topside
- **Preparation and processing:** brisket, neck, chuck, feather, thick flank, shin, clod, LMC, leg, heel, lean trim (+ the other 7 for 2/3 of class O) + all production for P class in all categories.

PATTERN OF BEEF EU INTERNAL PRODUCTION IN TONS



Includind veal, total saleable production in 2017 was 5.609.231 t.

- **12 % steak cuts**
- **10 % round cuts**
- **70 % prep. and processing**
- **8 % veal**

As percentage of c.w.

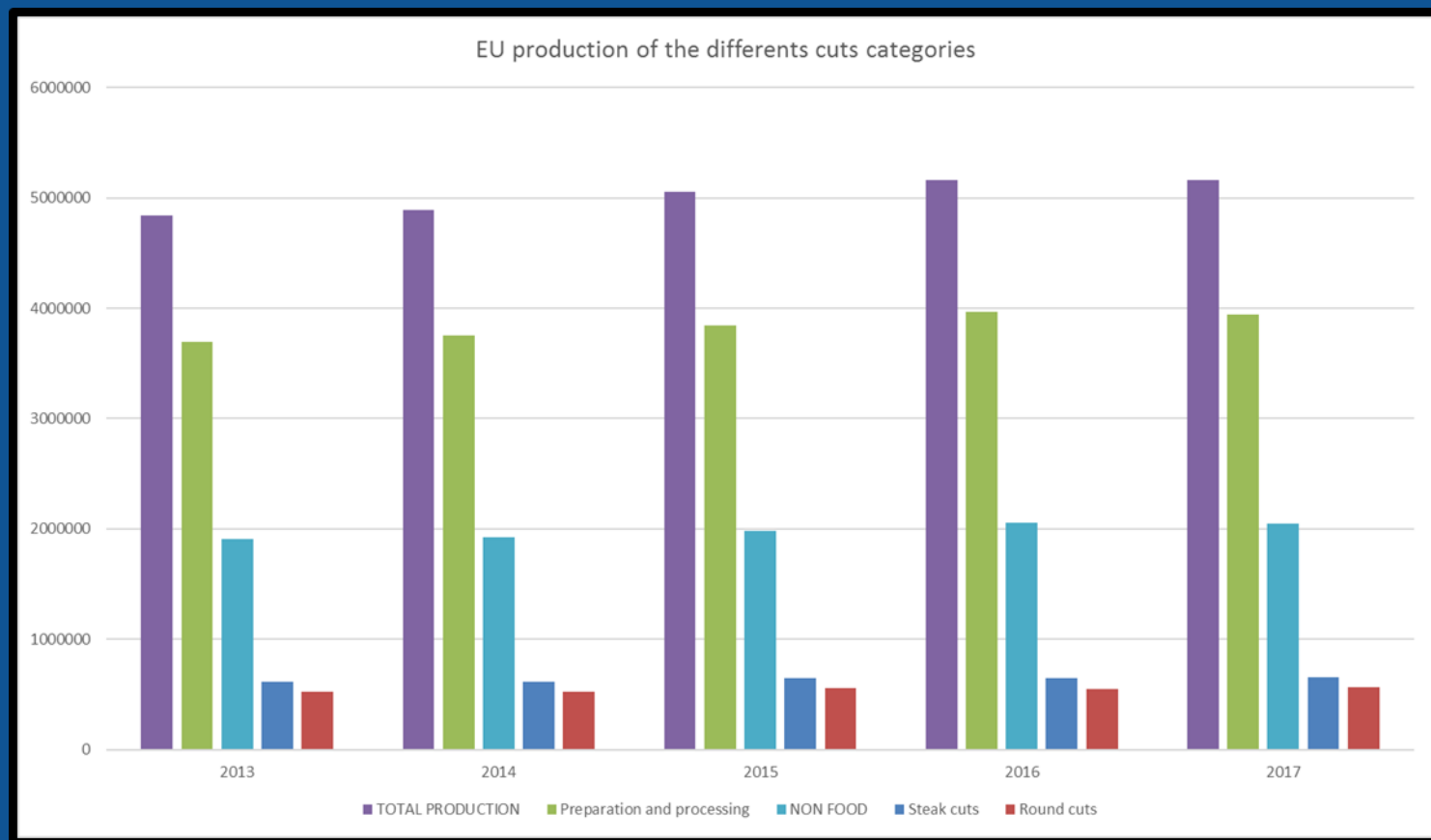
- **8,3 % steak cuts**
- **7 % round cuts**
- **50 % prep. and processing**
- **5,7 % veal**

TOTAL: 71 %

Bones, waste, fat: 29 %



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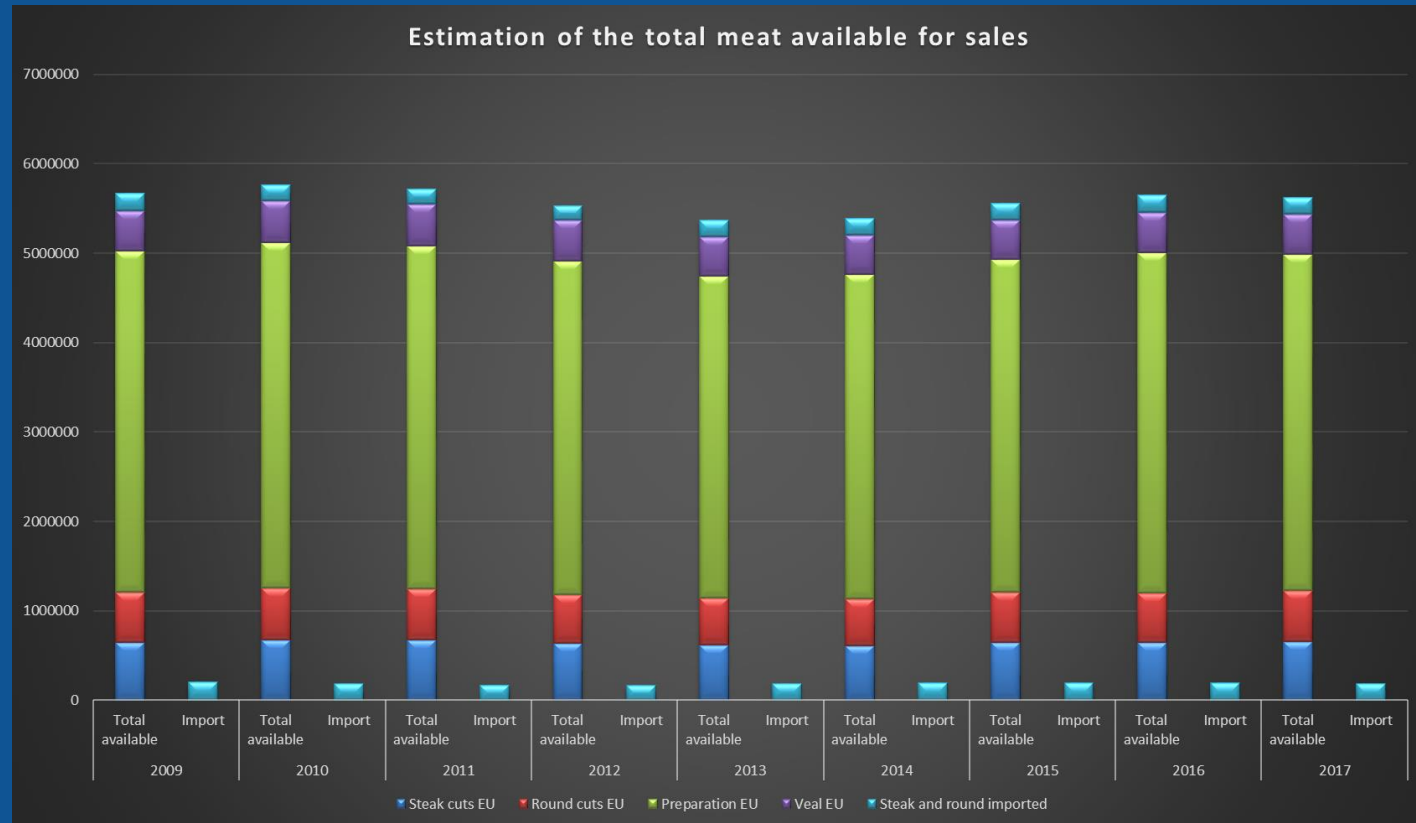


Variation rates of production types in EU

	14/13	15/14	16/15	17/16
Steak cuts	-0,43	6,13	-0,65	2,10
Round cuts	-0,23	6,30	-1,23	2,43
Preparation and processing	1,52	2,48	3,09	-0,66
Non food	0,84	3,03	3,61	-0,49
TOTAL PRODUCTION	1,08	3,34	2,13	0,02

Percentages of animals producing steak and round cuts

Category	2013	2014	2015	2016	2017
Z	49,99	49,99	51,61	50,58	51,28
A	74,51	72,90	79,68	73,88	76,40
B	66,00	65,46	66,67	65,64	69,76
C	66,13	68,27	65,16	66,00	64,09
D	35,94	34,73	35,19	35,69	34,62
E	78,40	77,45	80,67	77,62	76,97

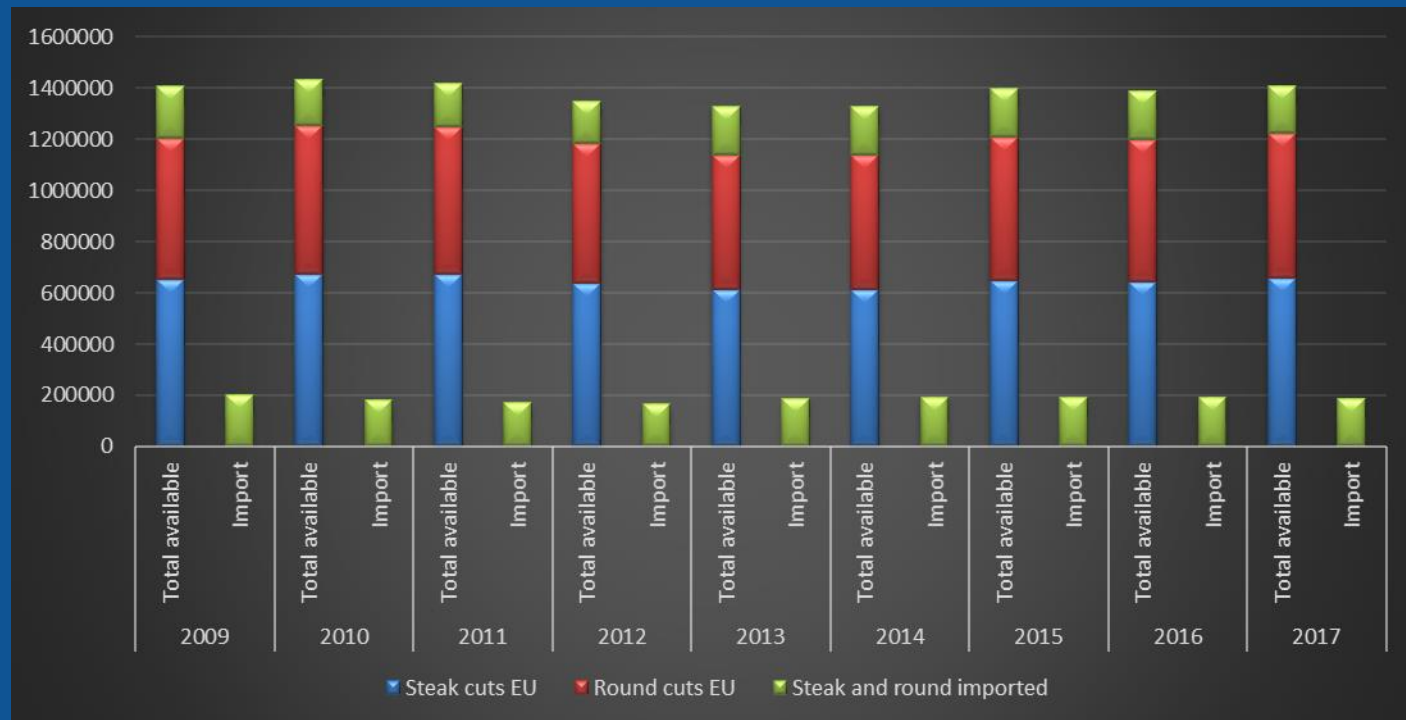


Total saleable meat in 2017 was 5.620.356 t.

Import of steak and round cuts accounted for 3% of total beef and veal availability.



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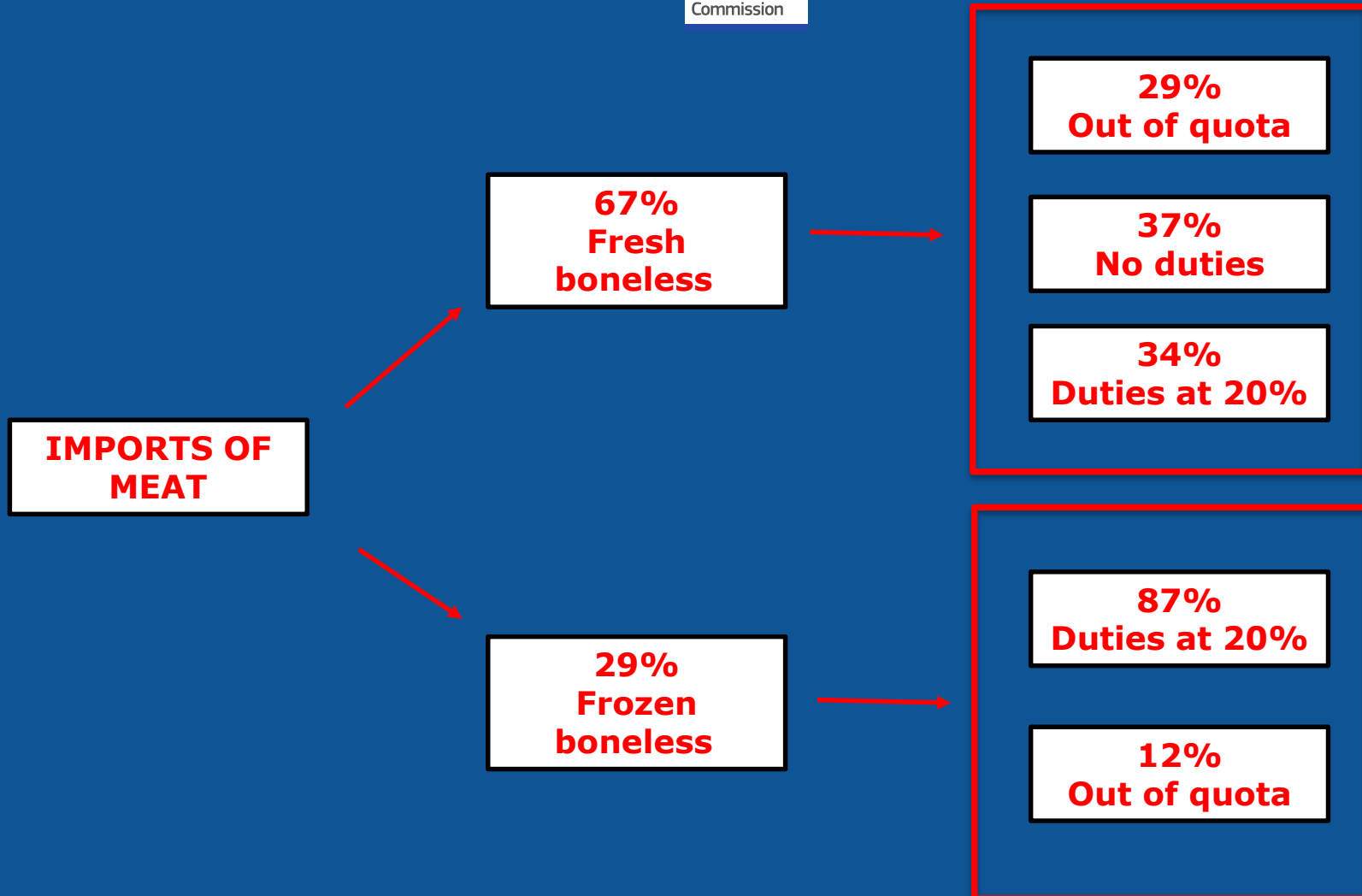


Total steak and round cuts available in 2017 were 1.400.000 t.

Imports accounted for 13% of the saleable steak and round cuts.



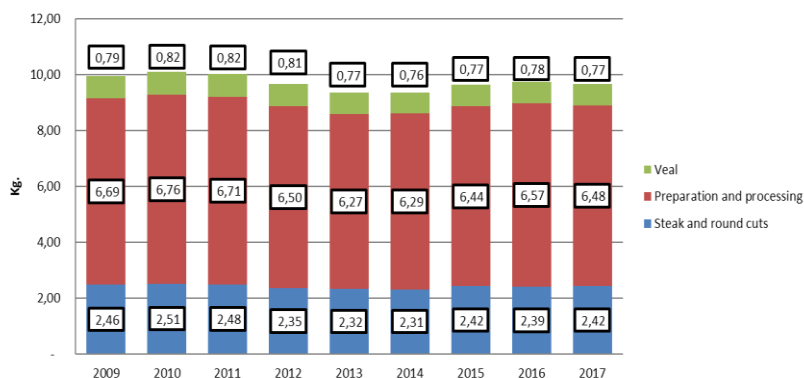
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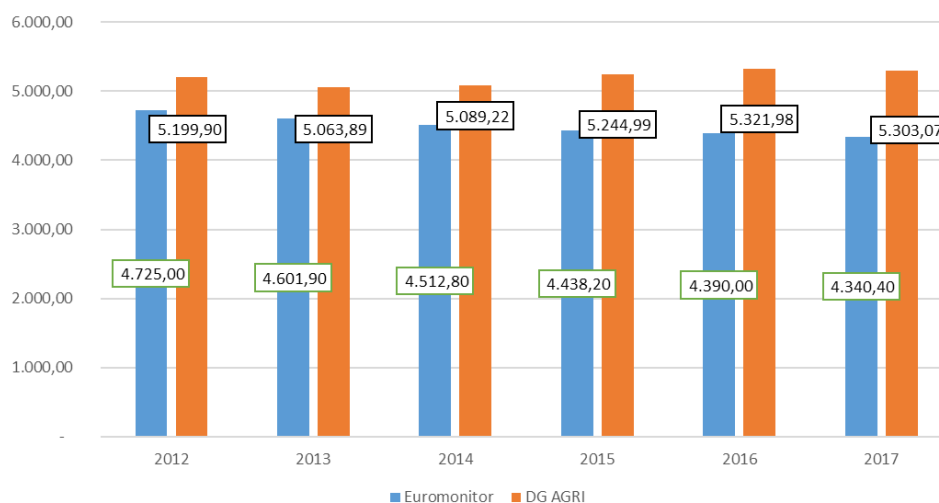
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Pattern of per capita consumption



Total 2017 estimated per-capita consumption of beef and veal: 9,66 kg

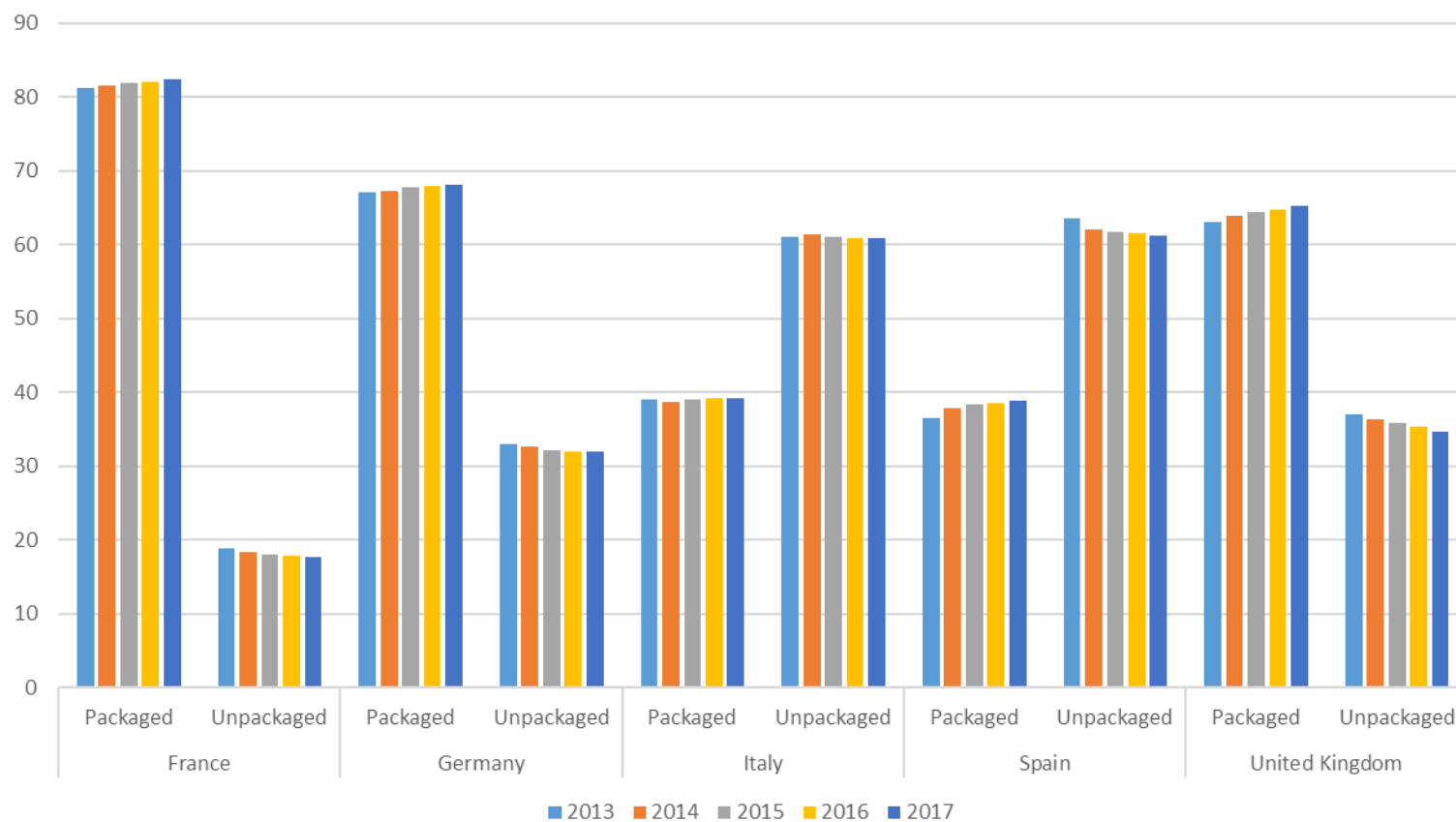
Comparison of total sales estimation of beef and veal using SEUROP data and Euromonitor data on reatail meat sales (x 1.000 tonnes)



Euromonitor data include fresh uncooked and unprocessed beef and veal including steak, cuts and mince, whether sold packaged or unpackaged, chilled or frozen sold at retail channel.

DG agri data include 6% of retail waste.

Percentages of sales for packed and unpacked meat (ALL SPECIES)



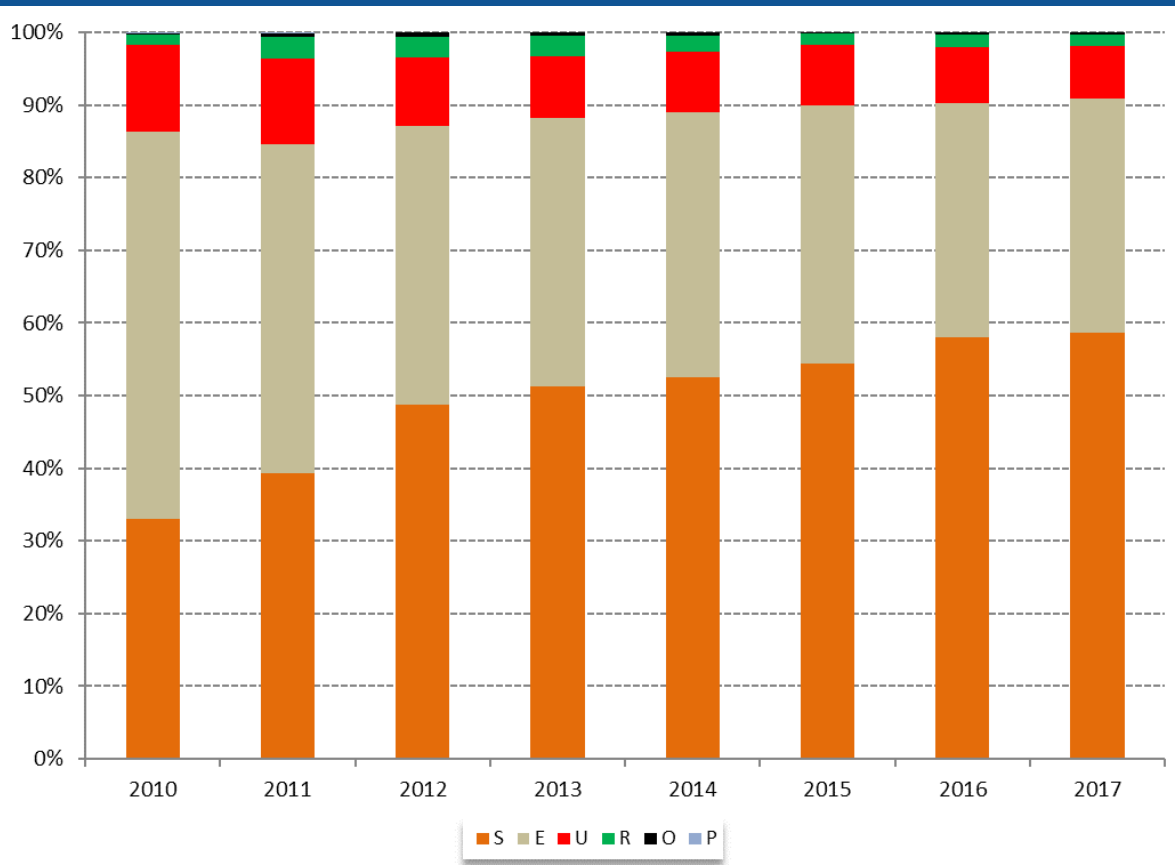
Source: Euromonitor



PIGS

(preliminary results)

Evolution of the SEUROP grid classification



Source: MS notifications

Evolution of the lean meat content in pig carcasses

CN CODE	Short definition	Coefficient by Russo et al. for meat content calculation	CN CODE	Short definition	Coefficient by Russo et al. for meat content calculation
02031110	Fresh carcasses	0,51	02101139	Dried shoulder bone ir	0,768
02031211	Fresh ham bone in	0,67	02101211	Salted bellies	0,683
02031219	Fresh shoulder bone ir	0,61	02101219	Dried bellies	0,683
02031911	Fresh fore-ends	0,5	02101910	Bacon side salted	0,703
02031913	Fresh loins	0,67	02101920	Middle swine salted	0,703
02031915	Fresh bellies	0,5	02101930	Salted fore-ends	0,703
02031955	Fresh boneless meat	0,8	02101940	Salted loins	0,942
02031959	Other fresh meat	0,6	02101950	Other salted meat	1,125
02032110	Frozen carcasses	0,51	02101960	Dried fore-ends	0,703
02032211	Frozen ham in bone	0,67	02101970	Dried loins	0,942
02032219	Frozen shoulder bone	0,61	02101981	Other dried meat	1,125
02032911	Frozen forehands	0,5	02101989	Other dried meat	0,843
02032913	Frozen loins	0,67	16010091	Sausages	1,061
02032915	Frozen bellies	0,5	16010099	Other sausages and pr	0,799
02032955	Frozen boneless meat	0,8	16024110	Cooked hams	0,97
02032959	Other frozen meat	0,6	16024210	Cooked shoulder	0,913
02101111	Salted hams	0,89	16024911	Cooked loins	1,229
02101119	Salted shoulder bone i	0,768	16024913	Cooked collar	1,229
02101131	Dried hams	0,89			

Source: Russo et al. Consumo reale di carne e di pesce in Italia. Dal consumo apparente al consumo reale con il metodo della Detrazione Preventiva delle Perdite. Franco Angeli Editore, 2017.

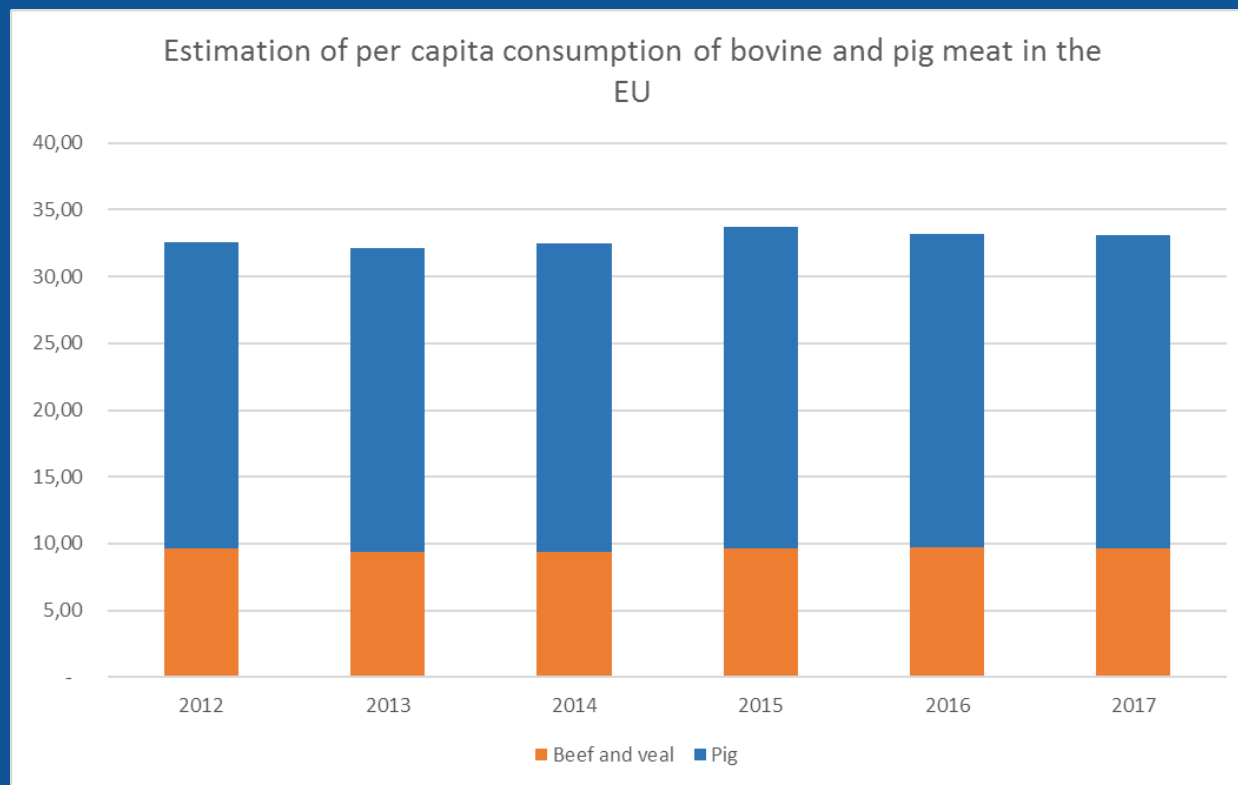
Preliminary results

	2012	2013	2014	2015	2016	2017
Production in c.w. (x 1.000 t)	22.650,20	22.546,25	22.750,08	23.859,88	23.871,28	23.647,15
Variation on previous year	-	0,46	0,90	4,88	0,05	- 0,94
Production of lean meat (x 1.000 t)	13.384,79	13.365,88	13.519,79	14.225,35	14.273,75	14.156,46
Variation on previous year	-	0,14	1,15	5,22	0,34	- 0,82
Percentage of lean meat on carcasses (EU average)	59,10%	59,28%	59,43%	59,62%	59,79%	59,87%
Imports of lean meat (1.000 t)	11,45	8,4	5,92	5,13	5,20	5,75
Exports of lean meat (1.000 t)	1.099,35	1.144,00	1.060,50	1.216,70	1.543,53	1.427,01
lean meat available (1.000 t)	12.296,89	12.230,28	12.465,21	13.013,78	12.735,42	12.735,21
Per capita consumption (kg)	22,93	22,76	23,11	24,06	23,46	23,39



CONSUMPTION OF LEAN MEAT!

Bovine and meat consumption per capita consumption in the EU





Open questions

Beef and veal

- Further classification of imports in steak and round cuts;
- Data at MS level: very difficult to classify INTRA EU trade into different cut categories.

Pig

- Percentage of intermuscular fat that go for consumption as fresh meat;
- Offal (production and trade available): destination??
- Data at MS level

Poultry, sheep and goat



THANKS YOU FOR YOUR ATTENTION