

Estimation of meat available for consumption in the EU

Beef and veal

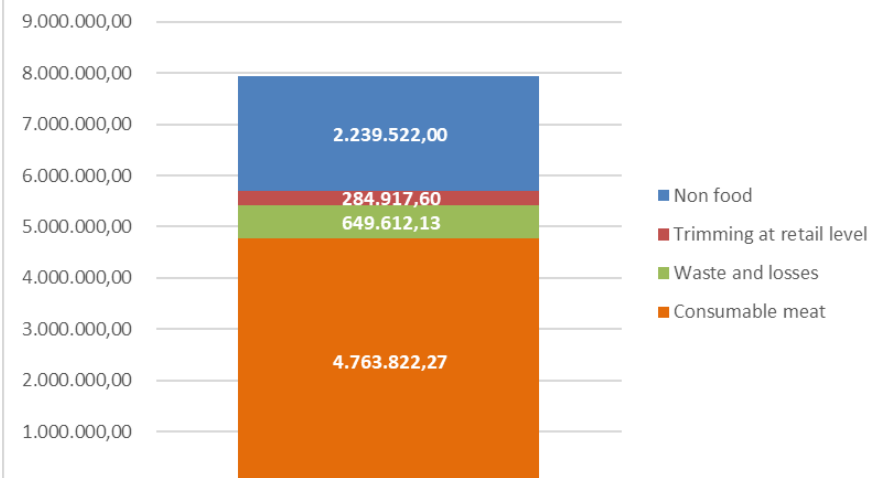
EU Production



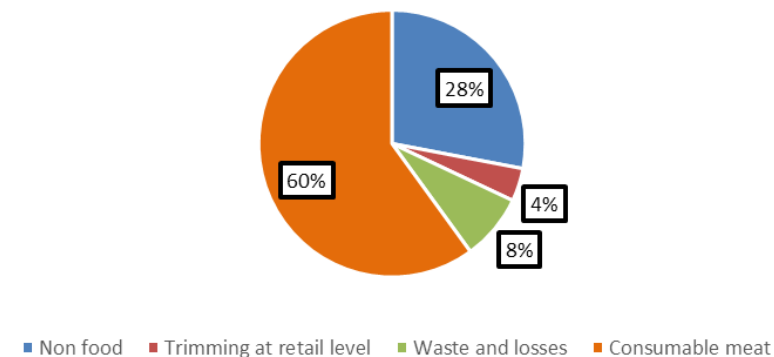
DEFINITIONS

- Carcass weight = EUROSTAT data
- **Product weight** = c.w. – non food (70-72% of c.w.)
(SEUROP grid for bovine and 70% of c.w. for veal)
- **Retail weight** = product weight – trimming at retail level (68% of c.w.)
- **Consumable weight** = retail weight – waste and losses (60 % of c.w.)

2018 - EU Production in tonnes



2018 - EU production as percentages of carcass weight

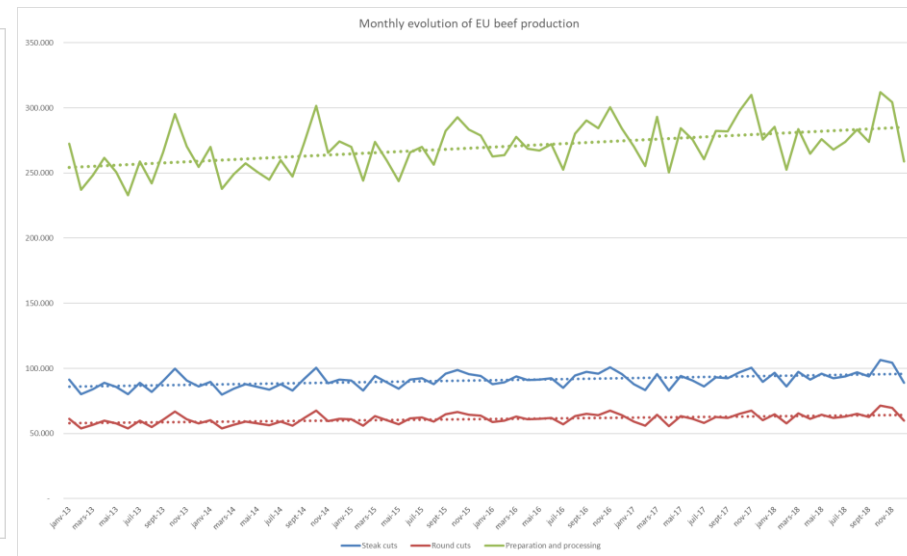
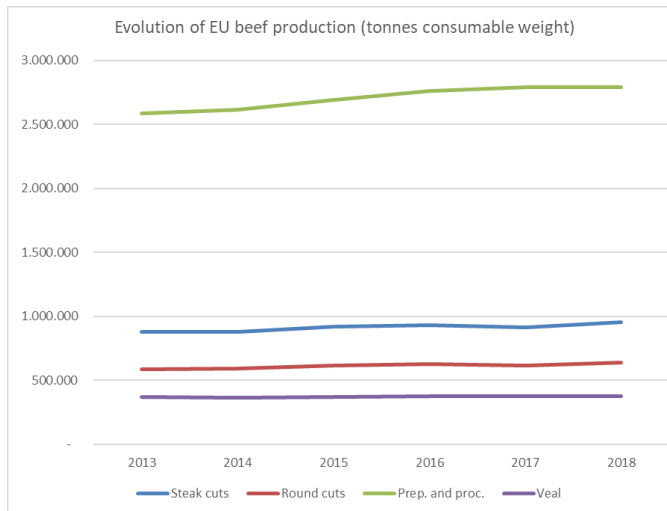
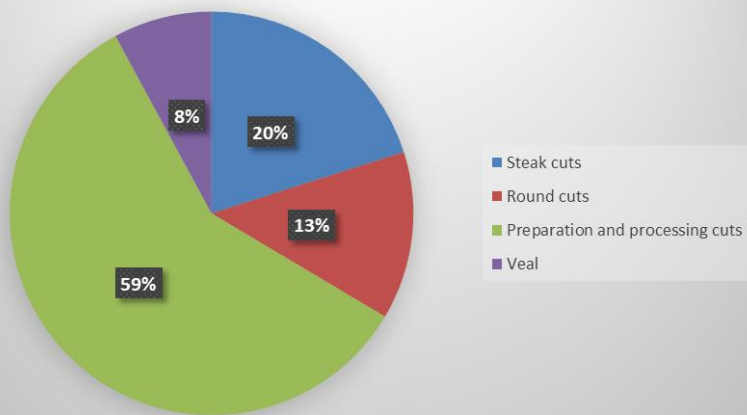


EU Production



60 % of carcass weight is potentially consumed

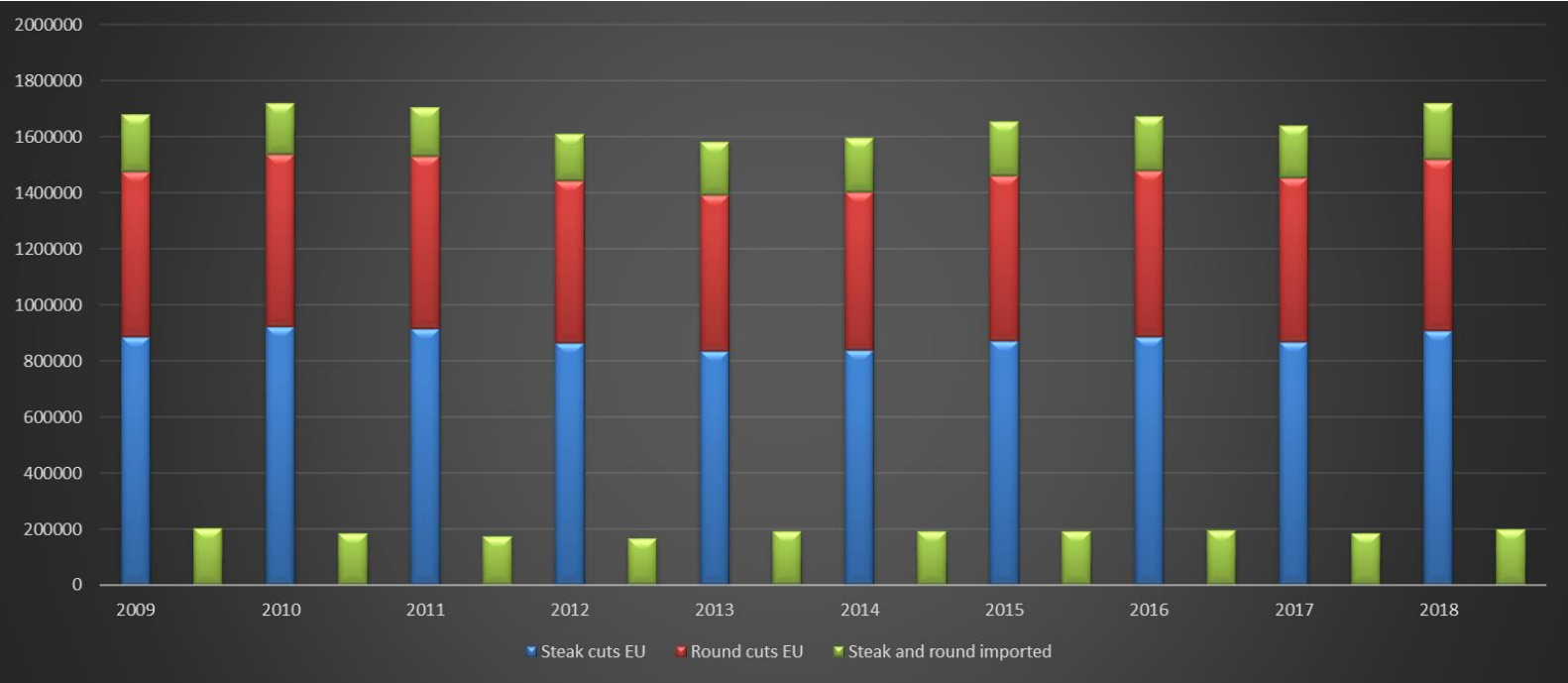
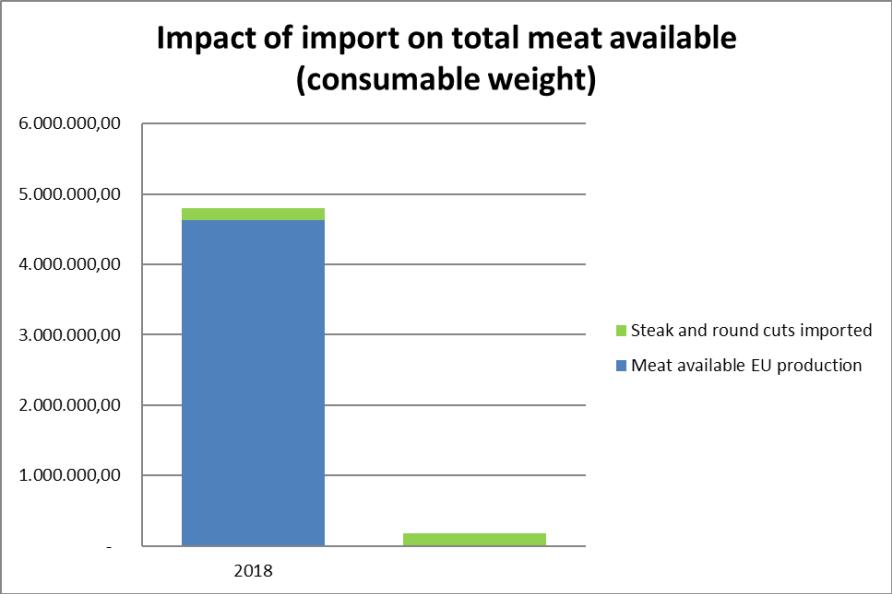
EU production 2018
Share of the different cuts



Evolution of EU beef production in tonnes consumable weight

Cuts type	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Steak cuts	930.346	968.782	964.251	909.437	876.691	881.577	918.170	932.441	914.549	956.747
Round cuts	622.084	649.089	646.016	610.283	588.607	593.167	618.616	625.462	614.803	641.356
Prep. and proc.	2.681.889	2.793.085	2.808.793	2.694.007	2.584.007	2.618.465	2.693.044	2.762.375	2.790.957	2.789.680
Veal	378.314	391.358	391.534	386.525	367.681	364.872	370.297	376.518	373.715	376.040
Total	4.612.633	4.802.314	4.810.594	4.600.252	4.416.986	4.458.081	4.600.128	4.696.796	4.694.024	4.763.823

EU Imports

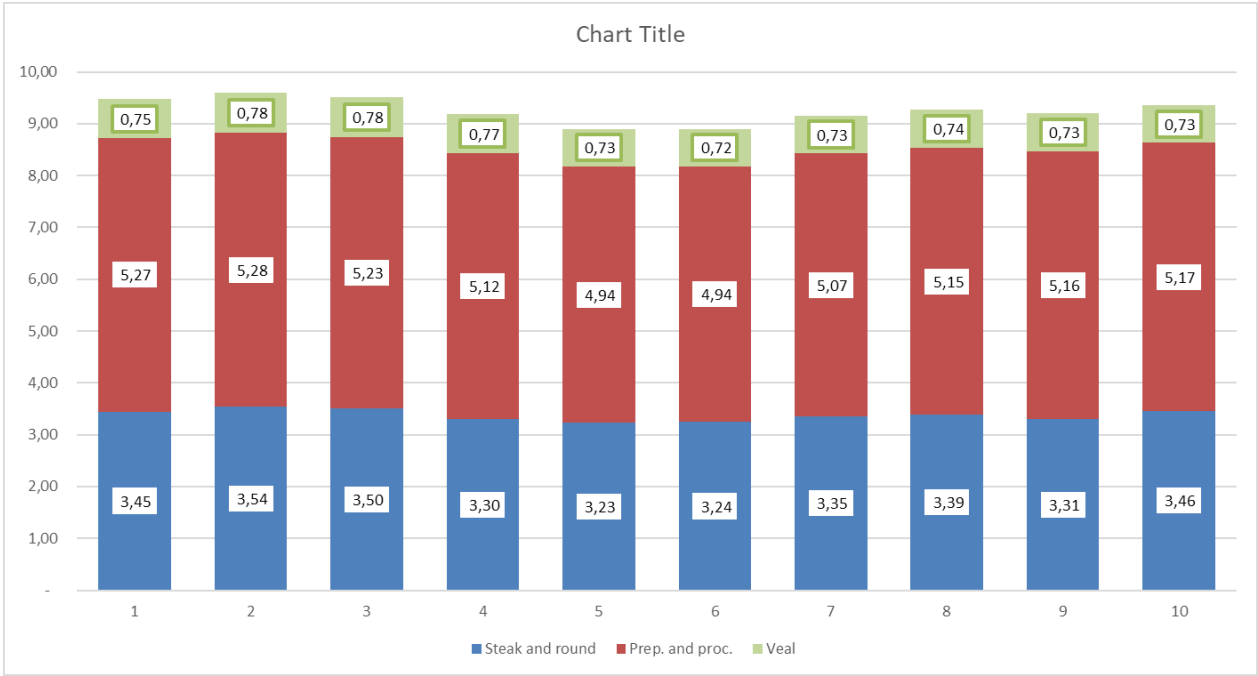


3.6% of total meat consumption
15% of the steak cuts market segment

Per capita consumption



Per capita beef consumption in the EU



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Steak and round	3,45	3,54	3,50	3,30	3,23	3,24	3,35	3,39	3,31	3,46
Prep. and proc.	5,27	5,28	5,23	5,12	4,94	4,94	5,07	5,15	5,16	5,17
Veal	0,75	0,78	0,78	0,77	0,73	0,72	0,73	0,74	0,73	0,73
Tot consumption	9,47	9,60	9,52	9,19	8,90	8,90	9,16	9,27	9,20	9,36
Var. on previous year		1,29	- 0,83	- 3,41	- 3,18	0,02	2,85	1,23	- 0,76	1,78

Pigmeat

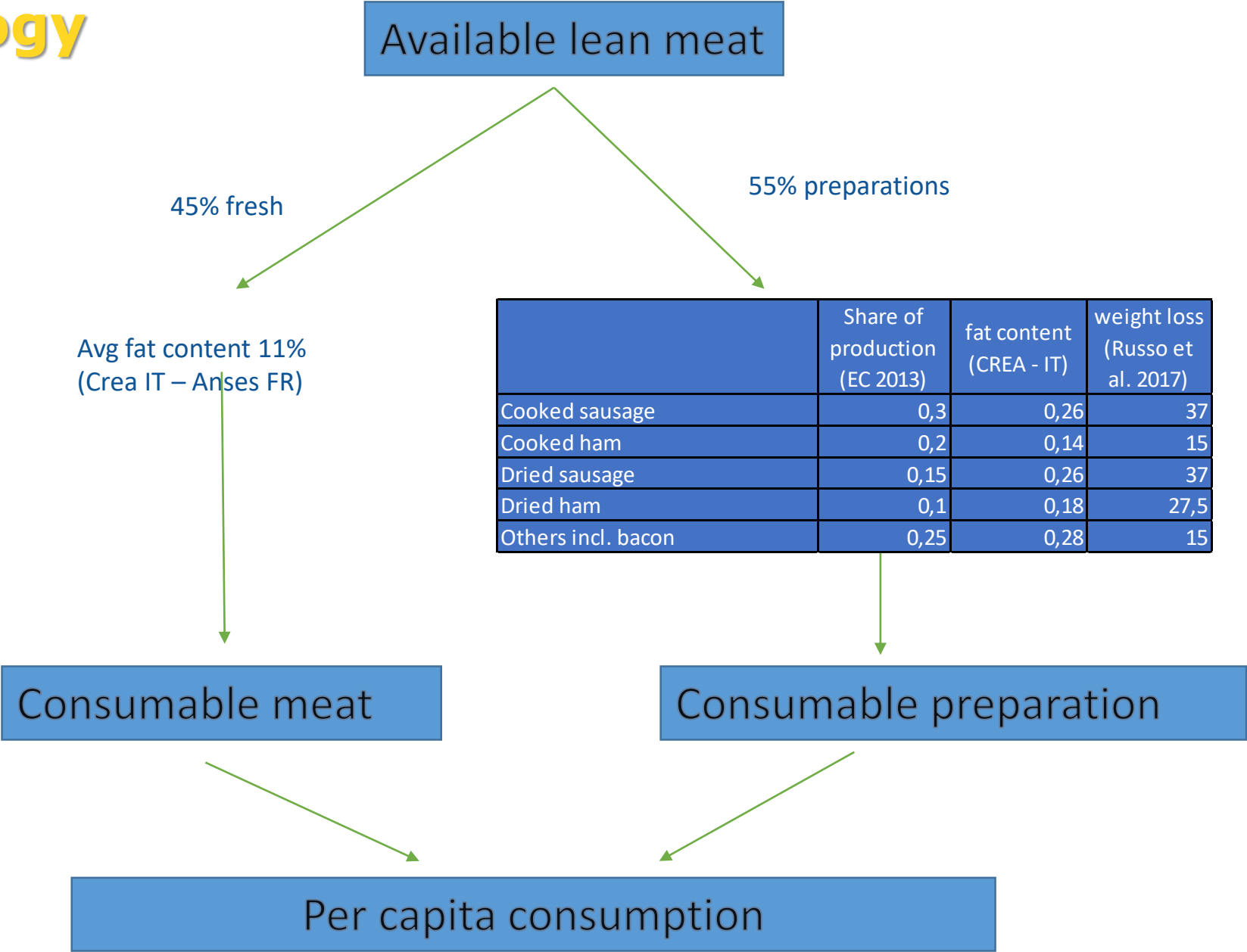
Pigmeat production



Production of lean meat in the EU

	2012	2013	2014	2015	2016	2017	2018
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	23.846,36
Variation on previous year	-	0,46	0,90	4,88	0,05	- 0,94	0,84
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	14.316,93
Variation on previous year	-	0,14	1,15	5,22	0,34	- 0,82	1,13
Percentage of lean meat on carcasses (EU average)	59,10%	59,28%	59,43%	59,62%	59,79%	59,87%	60,04%
Imports of lean meat (1.000 t)	11,45	8,4	5,92	5,13	5,20	5,75	6,11
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	1.486,35
lean meat available (1.000 t)	12.296,89	12.230,28	12.465,21	13.013,78	12.735,42	12.735,21	12.836,69

Methodology



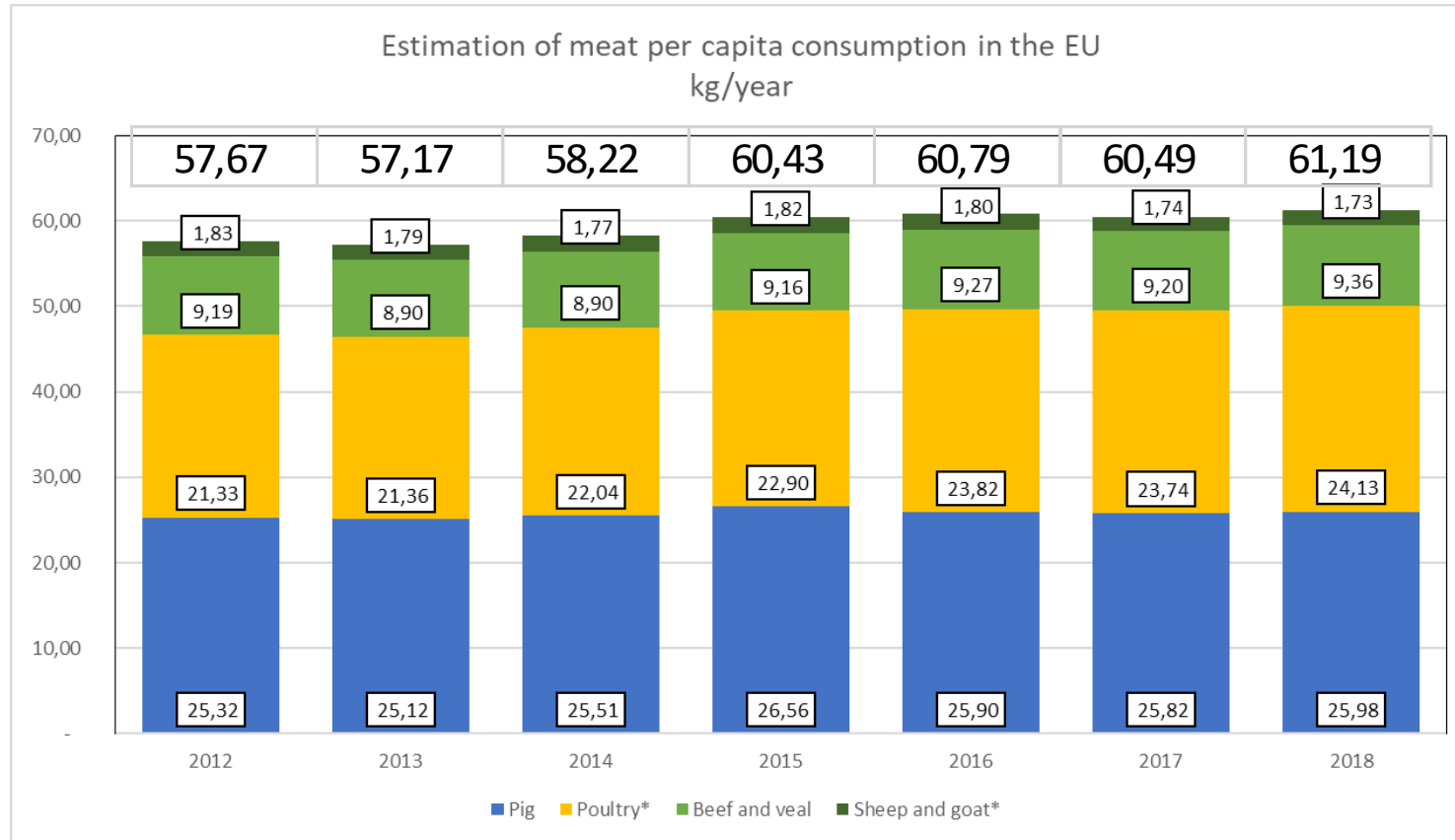
Per capita consumption



	2012	2013	2014	2015	2016	2017	2018
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	23.846,36
Variation on previous year	-	0,46	0,90	4,88	0,05	- 0,94	0,84
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	14.316,93
Variation on previous year	-	0,14	1,15	5,22	0,34	- 0,82	1,13
Percentage of lean meat on carcasses (EU average)	59,10%	59,28%	59,43%	59,62%	59,79%	59,87%	60,04%
Imports of lean meat (1.000 t)	11,45	8,4	5,92	5,13	5,20	5,75	6,11
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	1.486,35
lean meat available (1.000 t)	12.296,89	12.230,28	12.465,21	13.013,78	12.735,42	12.735,21	12.836,69
Per capita consumption (kg)	25,32	25,12	25,51	26,56	25,90	25,82	25,98

Conclusions

Per capita consumption



Poultry and sheep data from Medium term outlook

Future developments

- **Further refining estimation for poultry;**
- **Develop a monthly index of meat consumption when production and classification data from the Market transparency initiative will be available.**



THANKS YOU FOR YOUR ATTENTION