

# AGRICULTURAL OUTLOOK

*Sowing the Future of EU Agriculture*



Where we are, where we are heading to  
Presentation of the 2023 Medium-term Outlook of meats



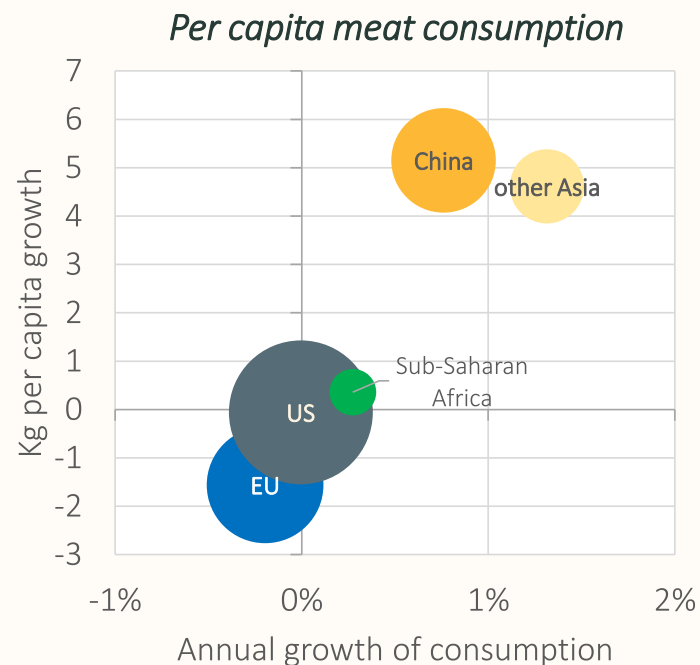
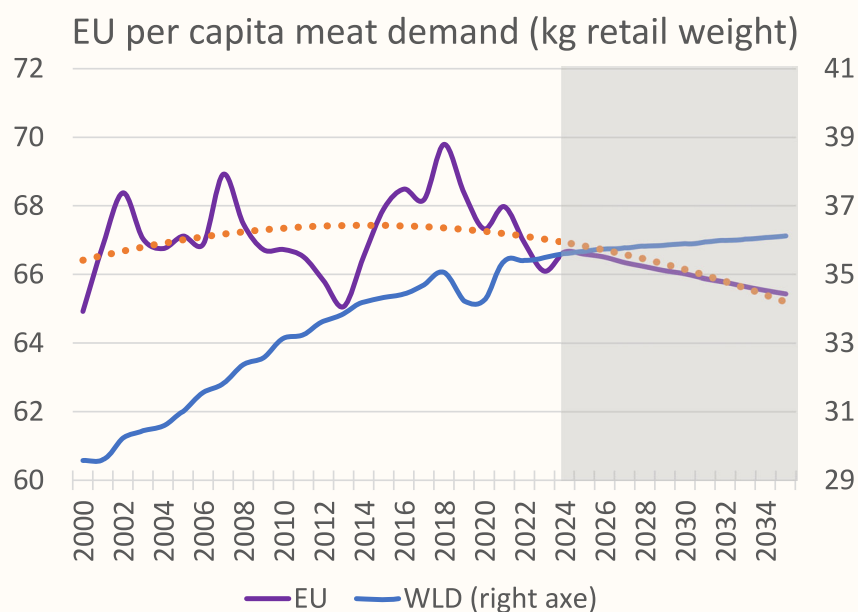
European  
Commission <sup>1</sup>



# How could EU meat sector evolve by 2035 ?

Civil Dialogue Group, 8 March 2024

# EU meat consumption declining, contrary to other markets



\*Sizes of bubbles correspond to per capita consumption in 2021-2023

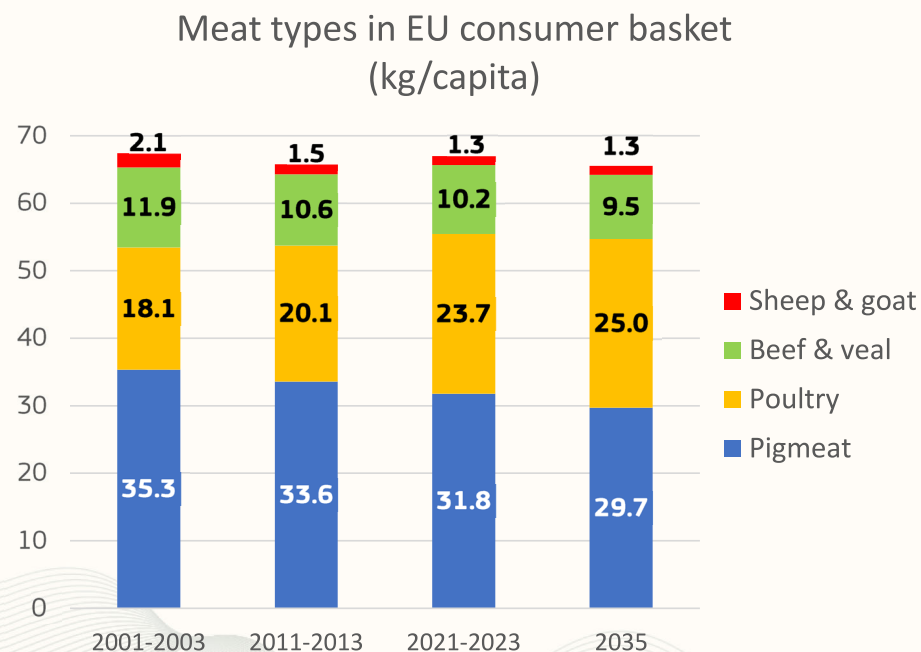
\*\* other Asia represent Asian countries except China and Japan



European  
Commission



# EU meat consumer basket

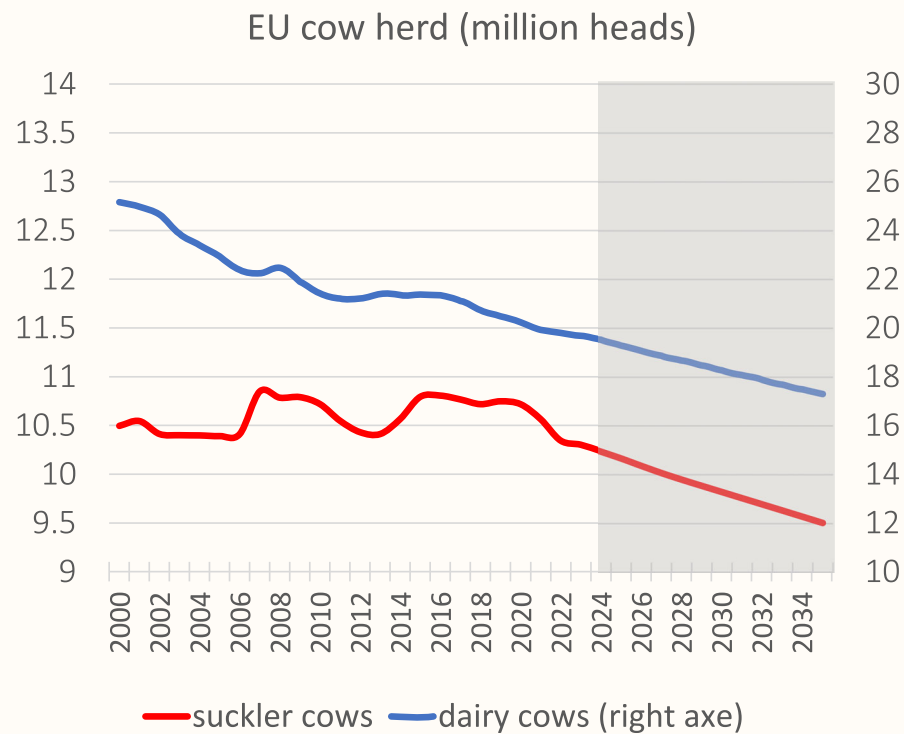


## Main elements:

- Sustained demand for S&G
- Decreasing trend for beef
- Poultry meat continues replacing pigmeat

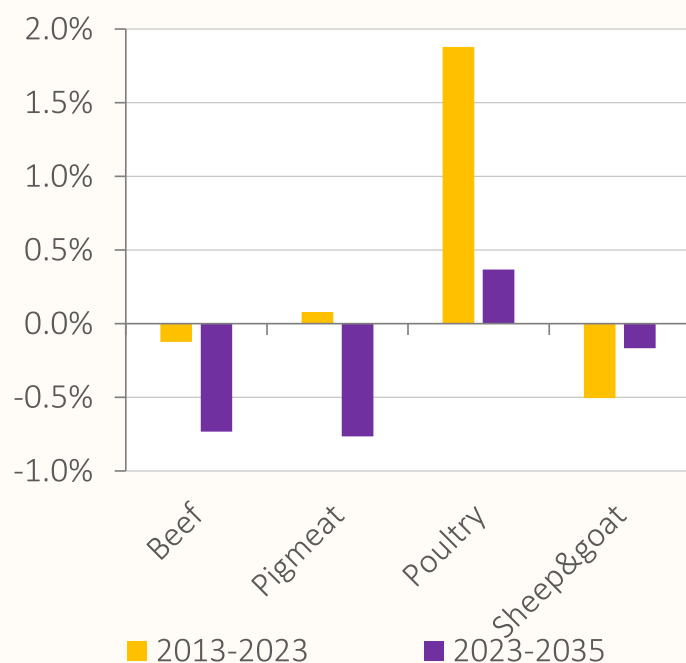


# EU cow herd continues shrinking



# EU meat production copes with challenges

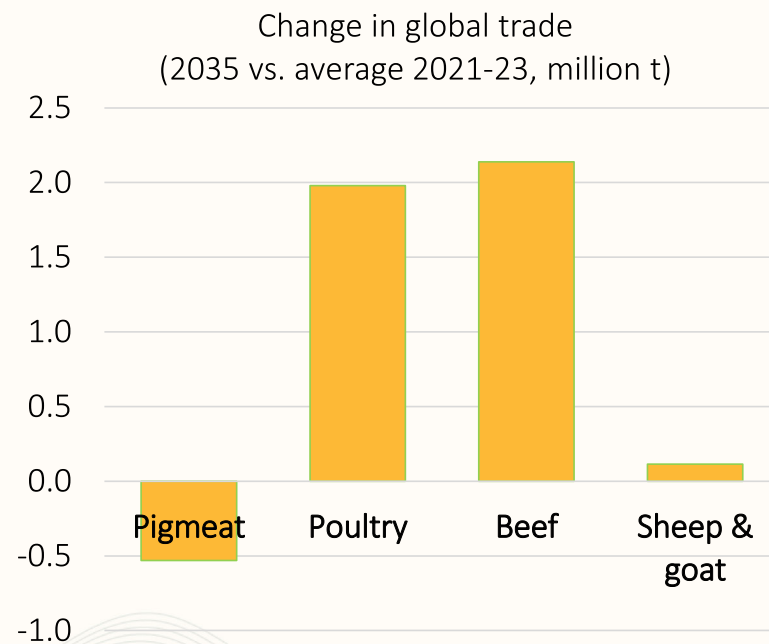
*Trends in animal production  
(average annual growth)*



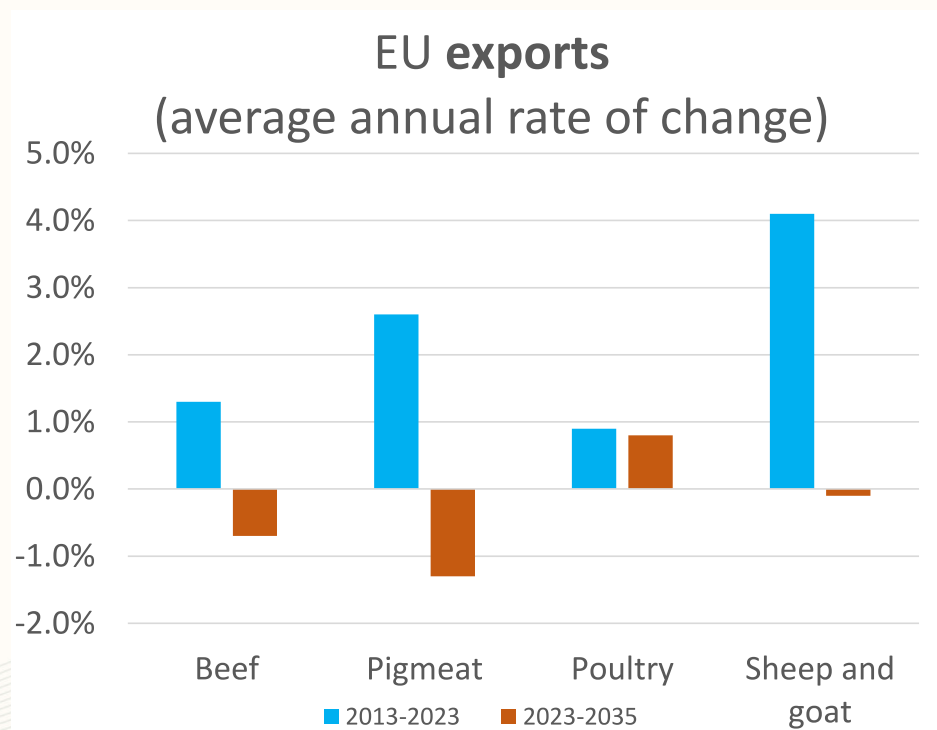
## Main elements:

- Demand (domestic and abroad)
- Profitability and costs
- Legislation (environment, climate, animal welfare, ...)
- CAP intervention
- Animal diseases

# Global meat trade is expanding



# EU trade

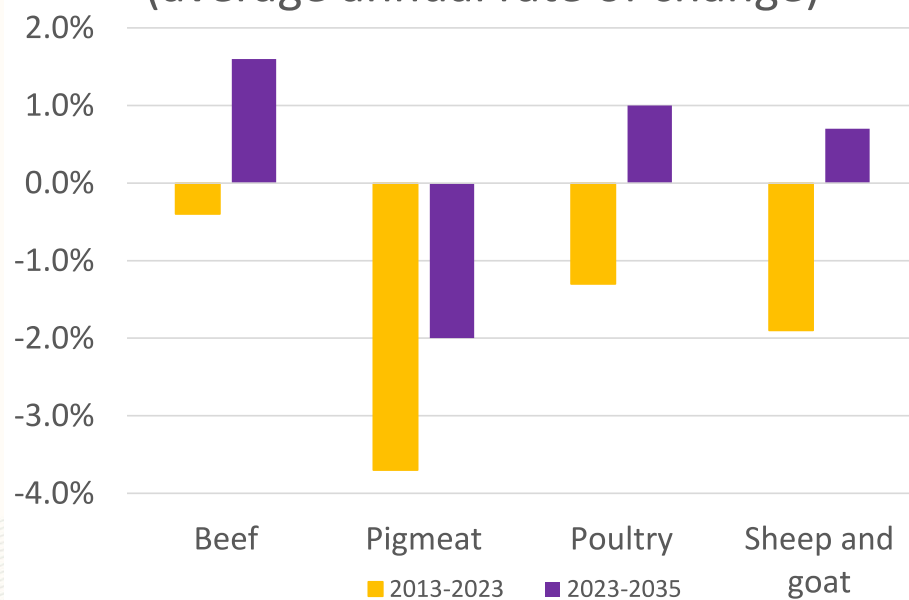


## Main elements:

- Import demand in Asia and Africa
- Competition
- Animal welfare concerns of live animal export



### EU imports (average annual rate of change)



### Main elements:

- Tight EU supply
- Competition between EU - World
- Attractive EU market



Any questions ?