



# Meat MO Kick-off meeting summary

15 July 2016

- o The kick-off meeting of the Meat Market Observatory (Meat MO) took place on 15 July 2016. It gathered representatives of the organisations representing all steps in the beef and veal and pigmeat supply chains: CEJA (young farmers), COPA-COGECA (producers and cooperatives), ECVC (Via Campesina), EUCBV (European Livestock and Meat Trading Union), CLITRAVI (Liaison Centre for the Meat Processing Industry in the EU), Eurocommerce (retail).
  - o Commissioner Hogan opened the meeting and highlighted that the Meat MO has been launched building on the positive experience of the existing Milk Market Observatory. He stressed that the role of the Meat MO is to provide the expertise and guidance that will underpin the meat sector's healthy, sustainable and successful growth.
  - o The Commissioner also inaugurated the Meat MO website.
  - o The participants were informed by Mr Jens Schaps, Director and chairman of the Economic Board, of the structure and functioning of the Meat MO, and on the role and responsibilities of the organisations which appoint experts to the Economic Board of the Meat MO.
- The floor was subsequently open for an exchange of views, including a presentation from EUCBV (See Annex III)
- o The sources of the data available on the Meat MO website were also highlighted.
  - o The rules of procedure were presented for the approval of the participants.
  - o Generally speaking, participants welcomed the initiative and expressed their readiness to contribute actively. Some suggestions were made to include additional information on the website. These will be examined and the website will evolve with time.
  - o The Economic Board had an exchange of views on the beef and veal and pig meat markets situation (See Annexes I and II)
  - o Mr Jerzy PLEWA Director-General for Agriculture and Rural Development closed the meeting and stressed the importance of the commitment of member organisations in setting up a successful Meat MO.
  - o The first ordinary meeting of the Meat MO Economic Board is scheduled for 27 October 2016.

# Annex I



# BEEF & VEAL MARKET SITUATION



Meat Market Observatory  
15 July 2016

# LIVESTOCK

# EU EVOLUTION TOTAL BOVINE

DECEMBER SURVEY



European  
Commission

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2015 2014	BOVINE < 1 Year				%Var 2015 2014	BOVINE 1-2 Year				%Var 2015 2014	BOVINE > 2 Year				%Var 2015 2014
	2012	2013	2014	2015		2012	2013	2014	2015		2012	2013	2014	2015		2012	2013	2014	2015	
BE	2 438	2 441	2 477	2 503	+1.1%	733	718	745	749	+0.5%	484	490	490	493	+0.7%	1 222	1 234	1 243	1 261	+1.5%
BG	535	586	562	561	-0.3%	121	150	121	109	-9.9%	64	62	65	64	-2.3%	350	374	376	388	+3.1%
CZ	1 321	1 332	1 373	1 366	-0.5%	395	390	413	403	-2.2%	298	300	311	309	-0.7%	628	642	649	654	+0.7%
DK	1 607	1 583	1 553	1 566	+0.8%	545	528	534	538	+0.7%	314	319	307	302	-1.6%	748	736	713	726	+1.8%
DE	12 507	12 686	12 742	12 635	-0.8%	3 868	3 878	3 909	3 836	-1.9%	2 940	3 015	3 011	2 993	-0.6%	5 699	5 793	5 823	5 806	-0.3%
EE	246	261	265	256	-3.2%	66	71	73	70	-3.8%	50	54	54	53	-2.8%	131	137	138	133	-3.1%
IE	6 253	6 309	6 243	6 422	+2.9%	1 987	1 893	1 886	2 026	+7.4%	1 617	1 714	1 649	1 660	+0.7%	2 650	2 701	2 709	2 737	+1.0%
EL	685	653	659	643	-2.4%	202	167	176	168	-4.5%	131	129	119	113	-5.0%	351	357	365	363	-0.5%
ES	5 813	5 802	6 079	6 183	+1.7%	2 122	2 068	2 302	2 325	+1.0%	714	735	746	786	+5.4%	2 977	2 999	3 031	3 072	+1.4%
FR	19 052	19 129	19 271	19 386	+0.6%	5 541	5 453	5 546	5 597	+0.9%	3 378	3 441	3 418	3 461	+1.3%	10 133	10 235	10 307	10 328	+0.2%
HR	452	442	441	458	+3.9%	143	145	132	148	+12.1%	101	92	88	88	idem	208	205	221	222	+0.5%
IT	6 252	6 249	6 125	6 156	+0.5%	1 598	1 680	1 654	1 678	+1.5%	1 421	1 457	1 366	1 379	+1.0%	3 072	3 112	3 106	3 099	-0.2%
CY	57	57	60	61	+3.1%	21	21	22	23	+3.1%	10	9	10	10	+2.0%	26	27	28	29	+3.8%
LV	393	406	422	419	-0.7%	108	109	118	114	-4.0%	70	75	75	76	+1.8%	215	222	229	229	+0.2%
LT	729	714	737	723	-1.9%	193	187	192	185	-3.6%	145	144	149	152	+1.7%	391	383	395	385	-2.5%
LU	188	198	201	201	-0.3%	52	55	54	54	-1.5%	43	45	47	45	-4.0%	93	98	100	102	+2.1%
HU	760	782	802	821	+2.4%	213	212	219	220	+0.5%	159	179	176	180	+2.3%	389	393	407	421	+3.4%
MT	16	15	15	15	+0.9%	5	4	4	4	-6.9%	4	4	3	4	+15.1%	7	7	7	7	-0.6%
NL	3 985	4 090	4 169	4 315	+3.5%	1 623	1 653	1 676	1 707	+1.8%	603	627	657	660	+0.5%	1 760	1 810	1 836	1 948	+6.1%
AT	1 956	1 958	1 961	1 958	-0.2%	629	627	629	624	-0.8%	424	435	432	439	+1.5%	903	897	899	894	-0.6%
PL	5 520	5 590	5 660	5 762	+1.8%	1 388	1 409	1 450	1 617	+11.5%	1 324	1 372	1 445	1 532	+6.0%	2 809	2 809	2 765	2 614	-5.5%
PT	1 498	1 471	1 549	1 591	+2.7%	451	425	487	500	+2.7%	206	211	214	238	+11.2%	840	834	848	853	+0.6%
RO	2 009	2 022	2 069	2 051	-0.9%	458	454	463	459	-0.9%	235	238	254	251	-1.1%	1 316	1 331	1 352	1 341	-0.9%
SI	460	461	468	484	+3.4%	147	144	148	152	+3.2%	120	123	122	129	+5.7%	193	194	198	202	+2.0%
SK	471	468	466	457	-1.7%	136	133	130	130	+0.3%	95	98	93	91	-1.8%	240	238	243	236	-2.8%
FI	901	903	907	903	-0.4%	301	302	307	308	+0.3%	225	224	223	221	-0.6%	376	378	378	374	-1.0%
SE	1 444	1 444	1 436	1 428	-0.6%	475	469	473	467	-1.3%	338	342	334	342	+2.3%	630	632	629	619	-1.5%
UK	9 749	9 682	9 693	9 789	+1.0%	2 921	2 803	2 842	2 955	+4.0%	2 395	2 411	2 332	2 328	-0.2%	4 433	4 468	4 520	4 506	-0.3%
EU	87 297	87 734	88 406	89 114	+0.8%	26 441	26 148	26 705	27 166	+1.7%	17 907	18 342	18 189	18 399	+1.2%	42 789	43 246	43 514	43 550	+0.1%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2014 AND 2015

15 July 2016

Agriculture  
and Rural  
Development



European  
Commission

Dec	TOTAL COWS					%Var 2015 2014	DAIRY COWS					%Var 2015 2014	OTHER COWS					%Var 2015 2014
	1000 Hd	2012	2013	2014	2015		2012	2013	2014	2015	2012		2013	2014	2015			
BE	945	945	956	974	+1.9%	504	516	519	529	+1.9%	441	429	436	445	+1.9%			
BG	323	353	351	359	+2.4%	294	313	302	284	-5.9%	29	40	49	75	+53.6%			
CZ	543	553	566	566	+0.0%	367	375	372	369	-0.9%	175	178	194	197	+1.8%			
DK	678	664	643	664	+3.3%	579	567	547	570	+4.2%	100	97	96	94	-2.1%			
DE	4 863	4 941	4 969	4 966	-0.1%	4 190	4 268	4 296	4 285	-0.3%	672	673	674	681	+1.1%			
EE	112	118	118	116	-2.4%	97	98	96	91	-5.3%	15	20	23	25	+10.1%			
IE	2 188	2 168	2 169	2 293	+5.7%	1 060	1 082	1 128	1 240	+9.9%	1 128	1 085	1 041	1 053	+1.1%			
EL	278	289	305	304	-0.3%	132	130	135	129	-4.4%	146	159	169	174	+3.0%			
ES	2 608	2 633	2 669	2 763	+3.5%	827	844	845	844	-0.1%	1 780	1 789	1 824	1 919	+5.2%			
FR	7 757	7 804	7 841	7 867	+0.3%	3 644	3 697	3 699	3 660	-1.1%	4 114	4 106	4 142	4 208	+1.6%			
HR	195	181	180	171	-5.0%	181	168	159	152	-4.4%	14	13	21	19	-9.5%			
IT	2 391	2 410	2 398	2 386	-0.5%	2 009	2 075	2 069	2 057	-0.6%	382	335	329	329	+0.2%			
CY	24	25	25	26	+2.0%	24	25	25	26	+1.9%	0	0	0	0	idem			
LV	190	194	200	201	+0.6%	165	165	166	162	-2.1%	26	29	34	39	+13.6%			
LT	352	345	351	343	-2.1%	331	316	314	301	-4.3%	21	29	37	43	+16.7%			
LU	74	78	75	77	+2.6%	45	48	47	49	+5.0%	29	30	29	28	-1.3%			
HU	339	345	359	368	+2.5%	255	250	255	251	-1.6%	83	96	104	117	+12.5%			
MT	6	6	7	7	-1.5%	6	6	7	6	-2.0%	0	1	0	0	+30.0%			
NL	1 643	1 683	1 694	1 802	+6.4%	1 541	1 597	1 610	1 717	+6.6%	102	86	84	85	+1.2%			
AT	772	766	768	758	-1.2%	523	530	538	539	+0.2%	248	237	230	219	-4.6%			
PL	2 469	2 442	2 403	2 303	-4.2%	2 346	2 299	2 248	2 134	-5.1%	123	143	155	169	+8.7%			
PT	678	677	697	716	+2.8%	237	231	234	241	+3.0%	442	446	463	476	+2.8%			
RO	1 180	1 187	1 207	1 196	-0.9%	1 163	1 169	1 188	1 177	-0.9%	17	18	18	18	idem			
SI	168	166	168	170	+0.9%	111	110	108	113	+4.6%	57	56	60	57	-5.7%			
SK	203	199	202	200	-1.1%	150	145	143	139	-2.7%	53	54	59	60	+2.7%			
FI	336	338	340	339	-0.1%	280	282	283	282	-0.2%	56	56	57	57	+0.6%			
SE	524	522	517	513	-0.9%	346	346	344	337	-2.1%	178	175	173	176	+1.5%			
UK	3 388	3 371	3 419	3 481	+1.8%	1 786	1 817	1 883	1 939	+3.0%	1 603	1 554	1 536	1 543	+0.5%			
<b>EU</b>	<b>35 225</b>	<b>35 401</b>	<b>35 596</b>	<b>35 929</b>	<b>+0.9%</b>	<b>23 193</b>	<b>23 468</b>	<b>23 559</b>	<b>23 622</b>	<b>+0.3%</b>	<b>12 034</b>	<b>11 934</b>	<b>12 037</b>	<b>12 307</b>	<b>+2.2%</b>			

15 July 2016

Source : EStat Newcronos

Agriculture  
and Rural  
Development

EU %Var is calculated considering only countries available in 2014 AND 2015

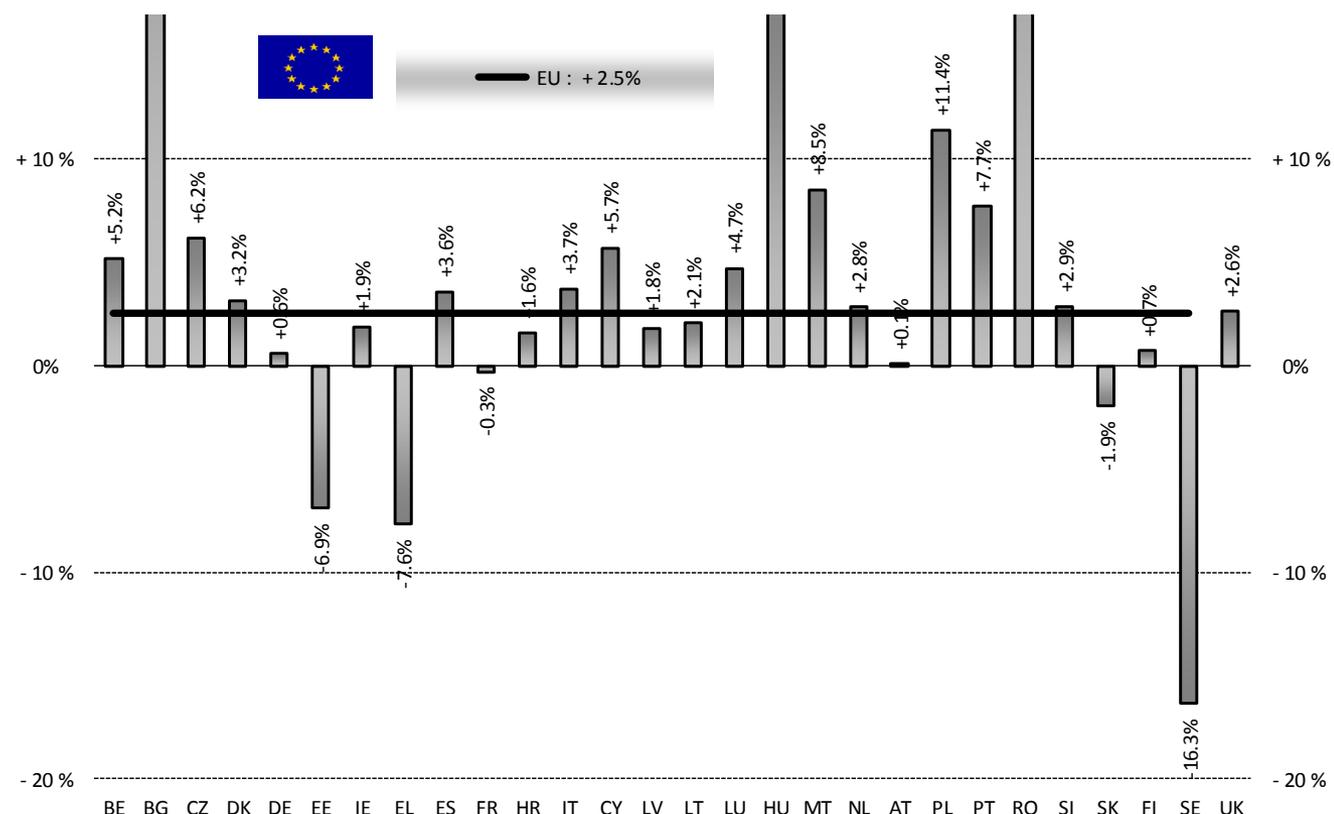
# PRODUCTION

# % EVOLUTION HEADS



HEADS	Jan-Apr 15/16	
	EU15	EU28
Bull	-2.3%	-0.6%
Bullock	-0.7%	-0.6%
Cow	+4.8%	+5.8%
Heifer	+3.1%	+4.3%
Calve	+1.7%	+1.7%
Young cattle	+0.6%	+1.6%
Meat of bovine animals	+1.5%	+2.5%

Estimates for last month of period : HR



Source : EStat - Newcronos

15 July 2016

# PRODUCTION

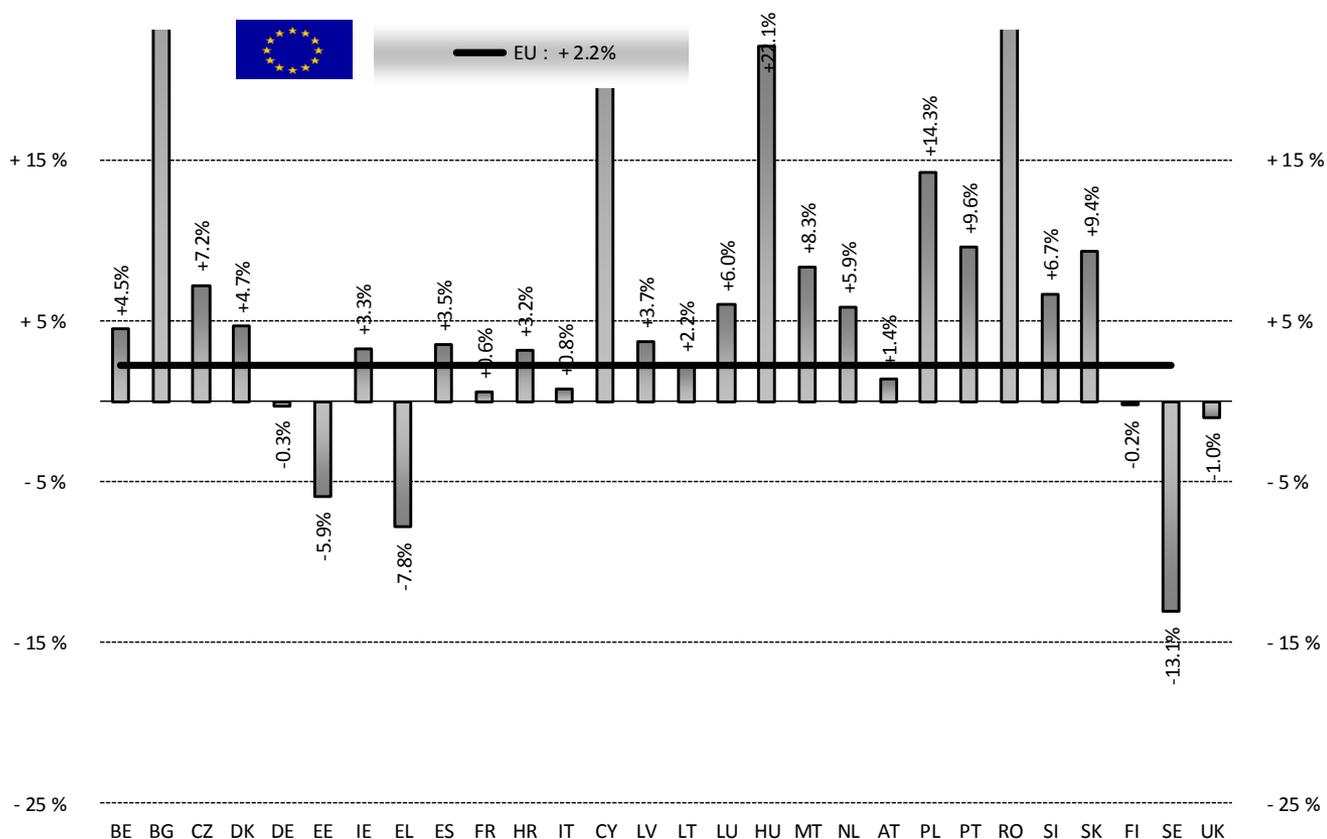
# % EVOLUTION TONNES



European  
Commission

TONNES	Jan-Apr 15/16	
	EU15	EU28
Bull	-2.2%	-0.2%
Bullock	-0.4%	-0.4%
Cow	+4.5%	+5.2%
Heifer	+1.5%	+2.8%
Calve	+1.7%	+1.7%
Young cattle	+0.4%	+1.4%
Meat of bovine animals	+1.0%	+2.2%

Estimates for last month of period : HR

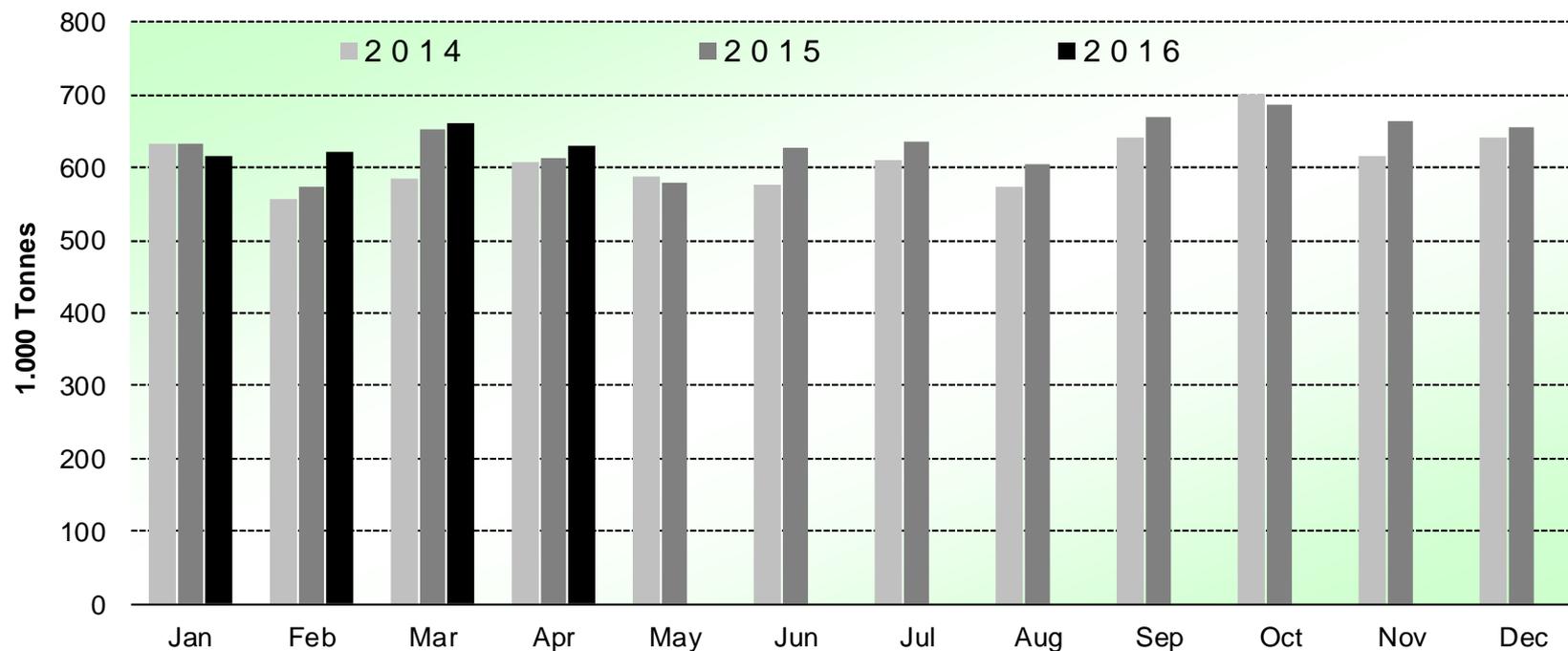


Source : EStat - Newcronos

15 July 2016



## Beef & Veal Production (E28 Slaughtering) - Tonnes



Source : EStat-Newcronos

15 July 2016

# PRICES CARCASSES



EU Prices week		27	Evolution since last week	Evolution since last month	Evolution since last year
<b>Carcasse</b>	Average A/C/Z-R3	356.5	- 0.6%	- 1.9%	- 7.2%
	Young Bovines (Z)	375.5	+ 0.4%	- 1.2%	+ 0.4%
	Young Bulls (A)	352.1	- 0.4%	- 1.1%	- 1.4%
	Steers (C)	389.2	- 1.6%	- 4.6%	- 16.0%
	Cows (D)	273.0	- 0.6%	- 2.1%	- 12.5%
	Heifers (E)	374.8	- 0.5%	- 1.6%	- 6.5%
<b>Live Animals</b>	Male Calves Dairy Type	121.2	- 2.3%	+ 0.4%	- 0.6%
	Male Calves Beef Type	238.4	- 2.5%	- 1.8%	- 2.5%
	Young Store Cattle	2.30	- 1.2%	- 3.4%	- 6.2%
	Yearling Male Store Cattle	2.24	- 1.4%	- 3.5%	- 9.2%
	Yearling Female Store Cattle	2.24	- 1.6%	- 2.3%	- 6.2%
	Calves slaughtered <8M	479.0	- 0.8%	- 1.6%	- 5.2%

Sources : MSs notifications (Regulation (EC) 1249/2008 and 807/2013)

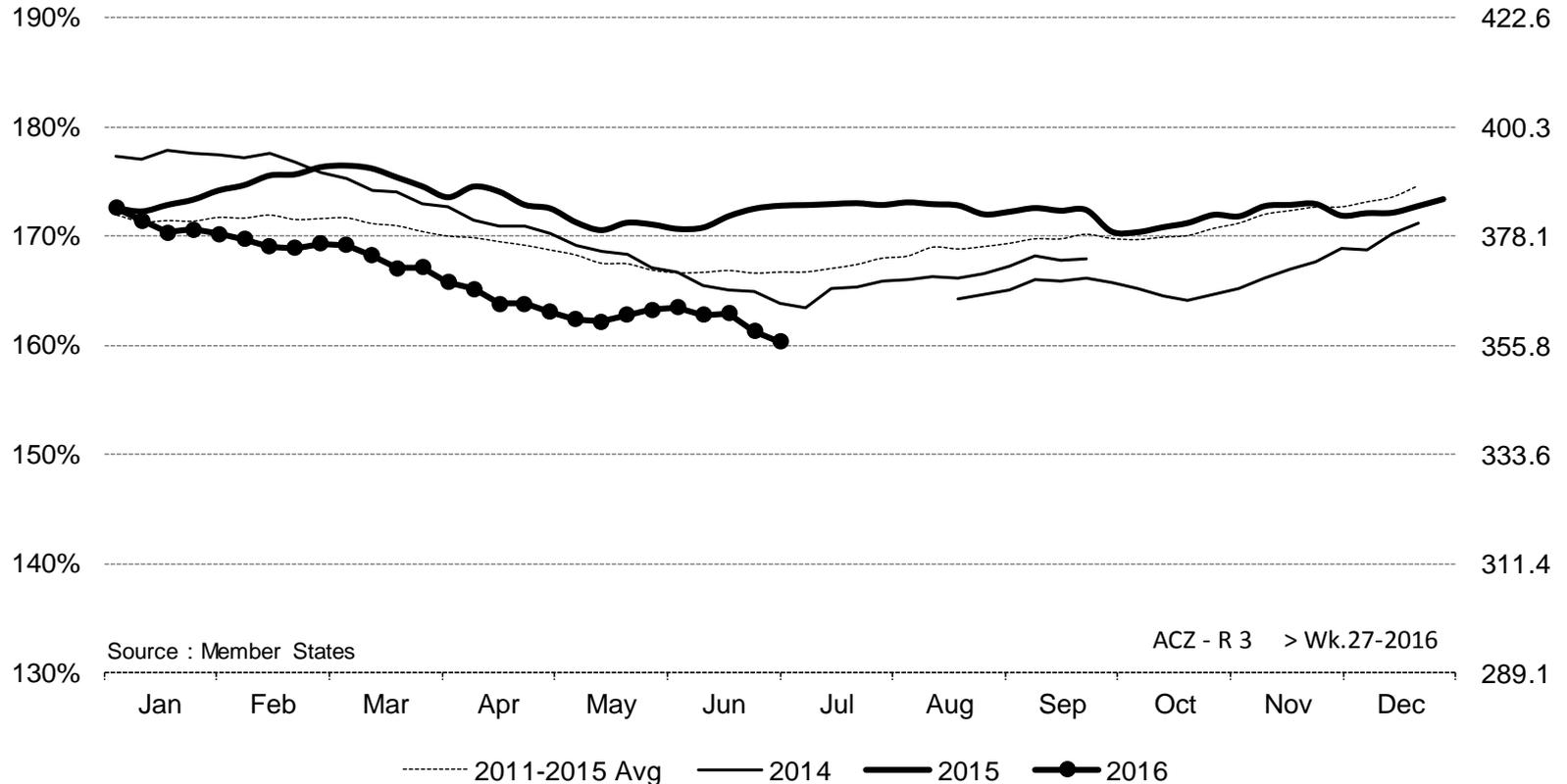
15 July 2016



## ACZ - R 3 > Wk.27-2016

% of Reference Price

€/100 kg cwe



Price in week 27 : **356.53**  
 % change y/y : **- 7.2%**  
 % Ref. Price in wk 27 : **160.3%**

Average price in June 2016 : **362.21**  
 % change y/y : **- 5.1%**

15 July 2016



## EU Beef prices ACZ - R3

Jun 16 vs Jun 15

€/ 100 kg

600.00

500.00

400.00

300.00

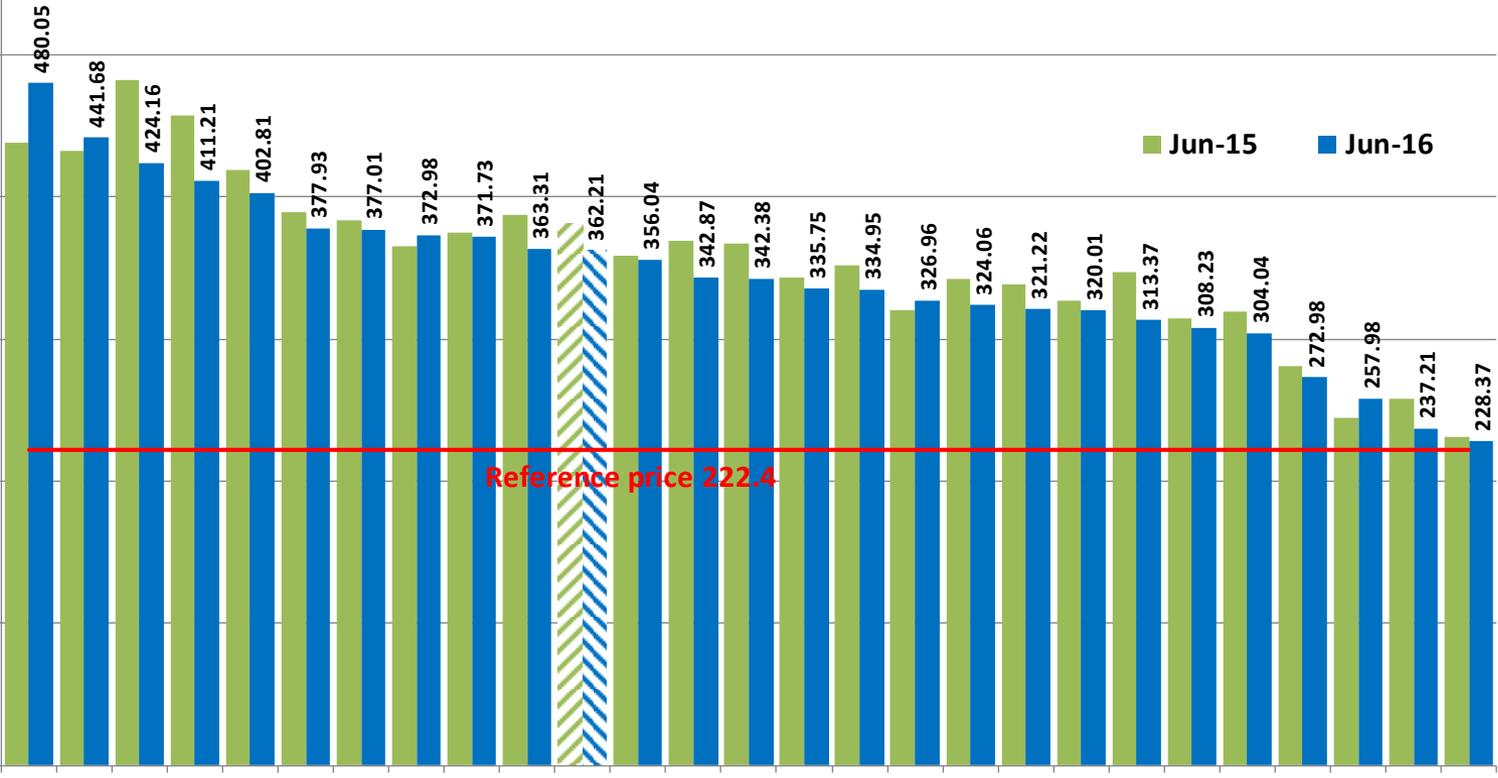
200.00

0.00

■ Jun-15 ■ Jun-16

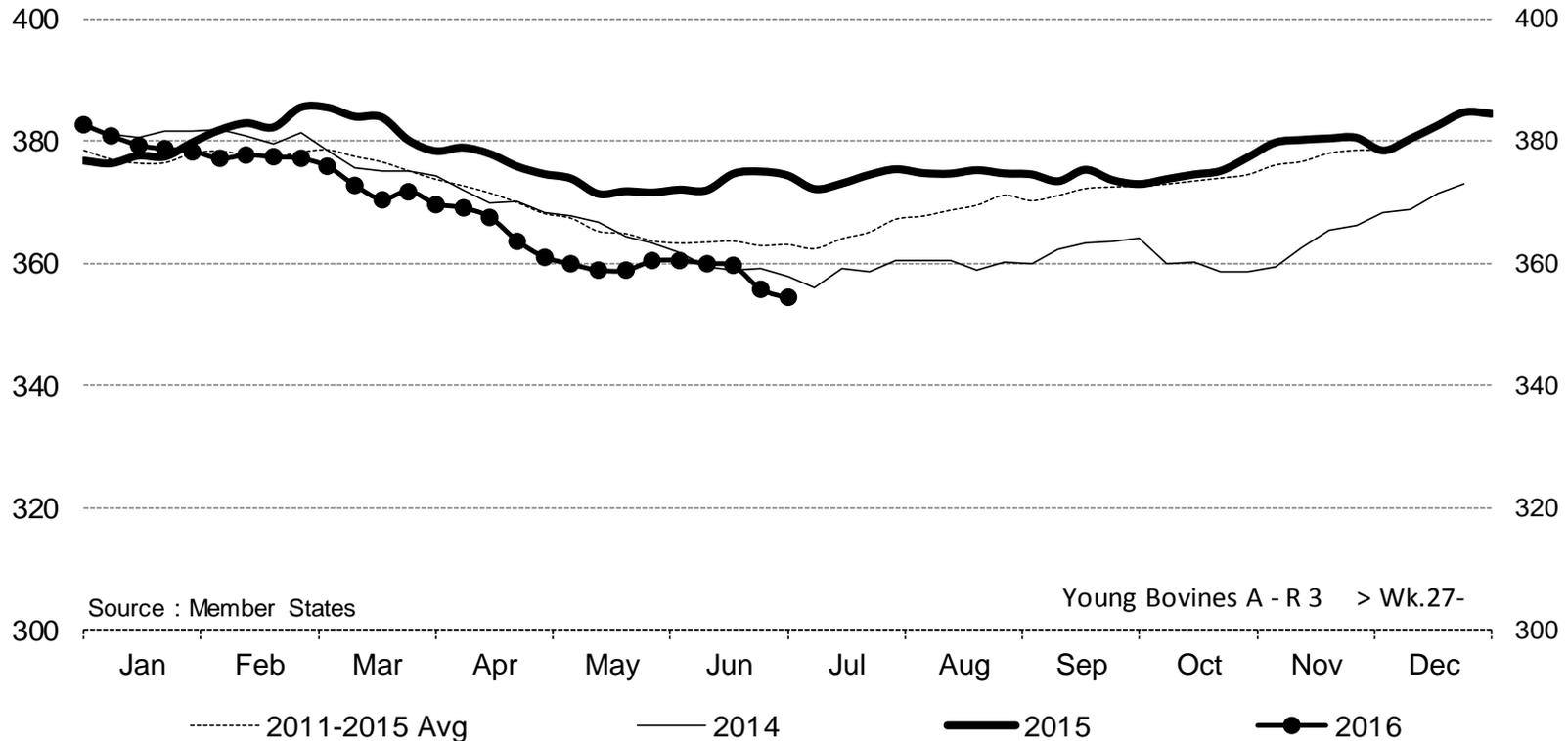
Reference price 222.4

SE GR GB NI IE FI IT SP LU DK EU PT DE AT HR BE SK SI FR CZ NL EE PL LT HU RO LV



15 July 2016

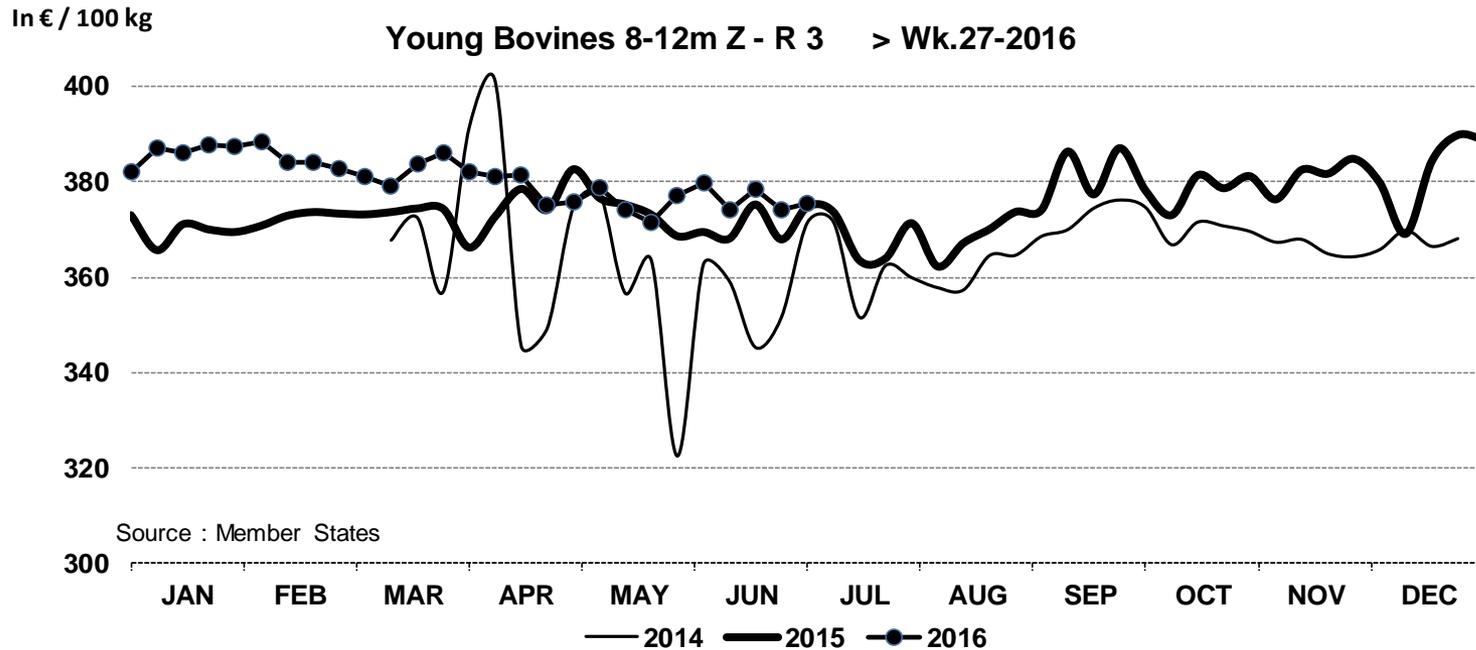
## Young Bovines A - R 3 > Wk.27-2016



Price in week 27 : **354.38**  
% change y/y : **- 5.3%**

Average price in June 2016 : **359.54**  
% change y/y : **- 3.7%**

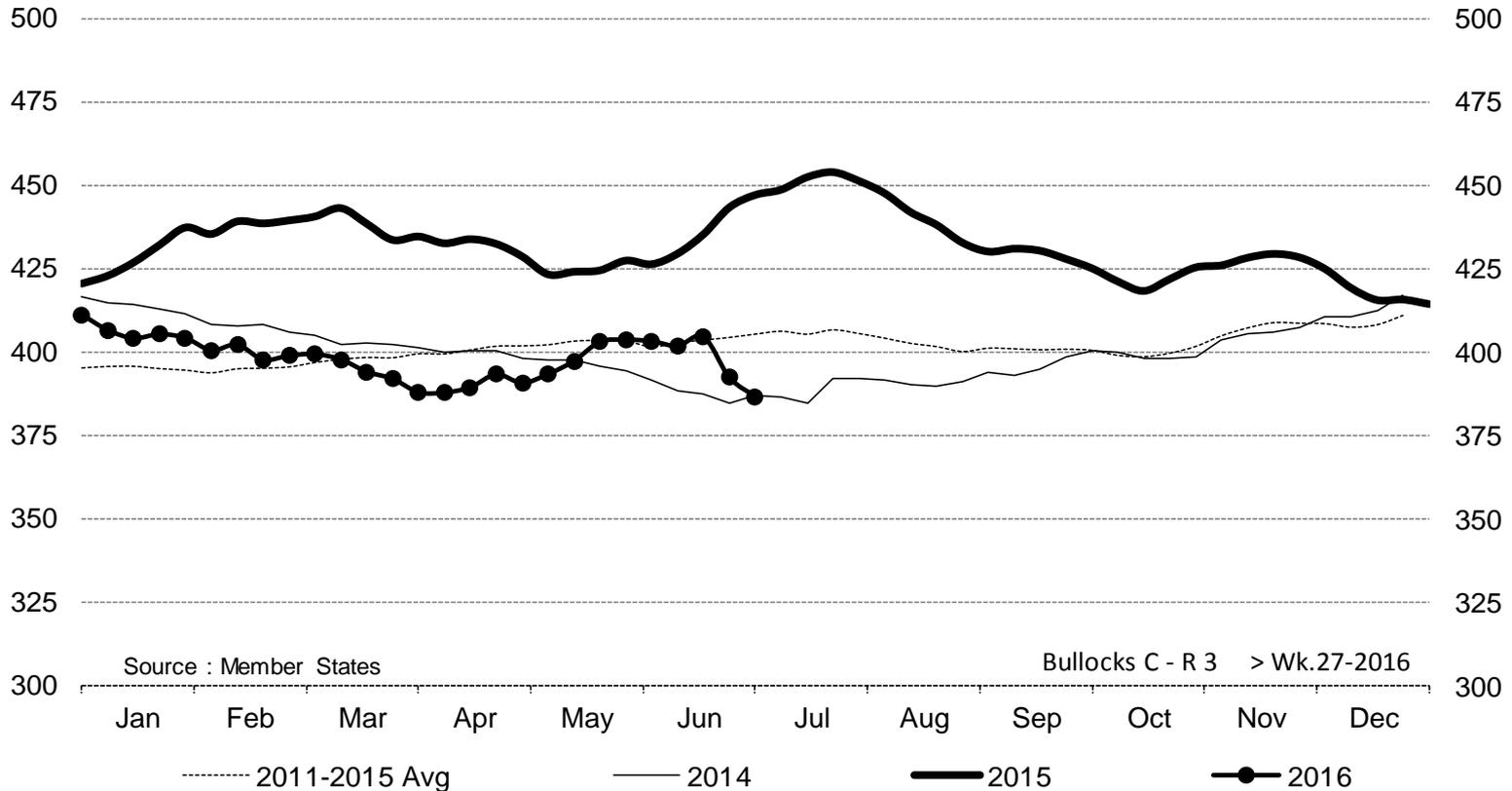
15 July 2016



Price in week 27 : **375.52**  
% change y/y : **+ 0.2%**

Average price in June 2016 : **376.97**  
% change y/y : **+ 1.7%**

## Bullocks C - R 3 > Wk.27-2016



Price in week 27 : **386.64**  
% change y/y : **- 13.5%**

Average price in June 2016 : **401.78**  
% change y/y : **- 7.5%**

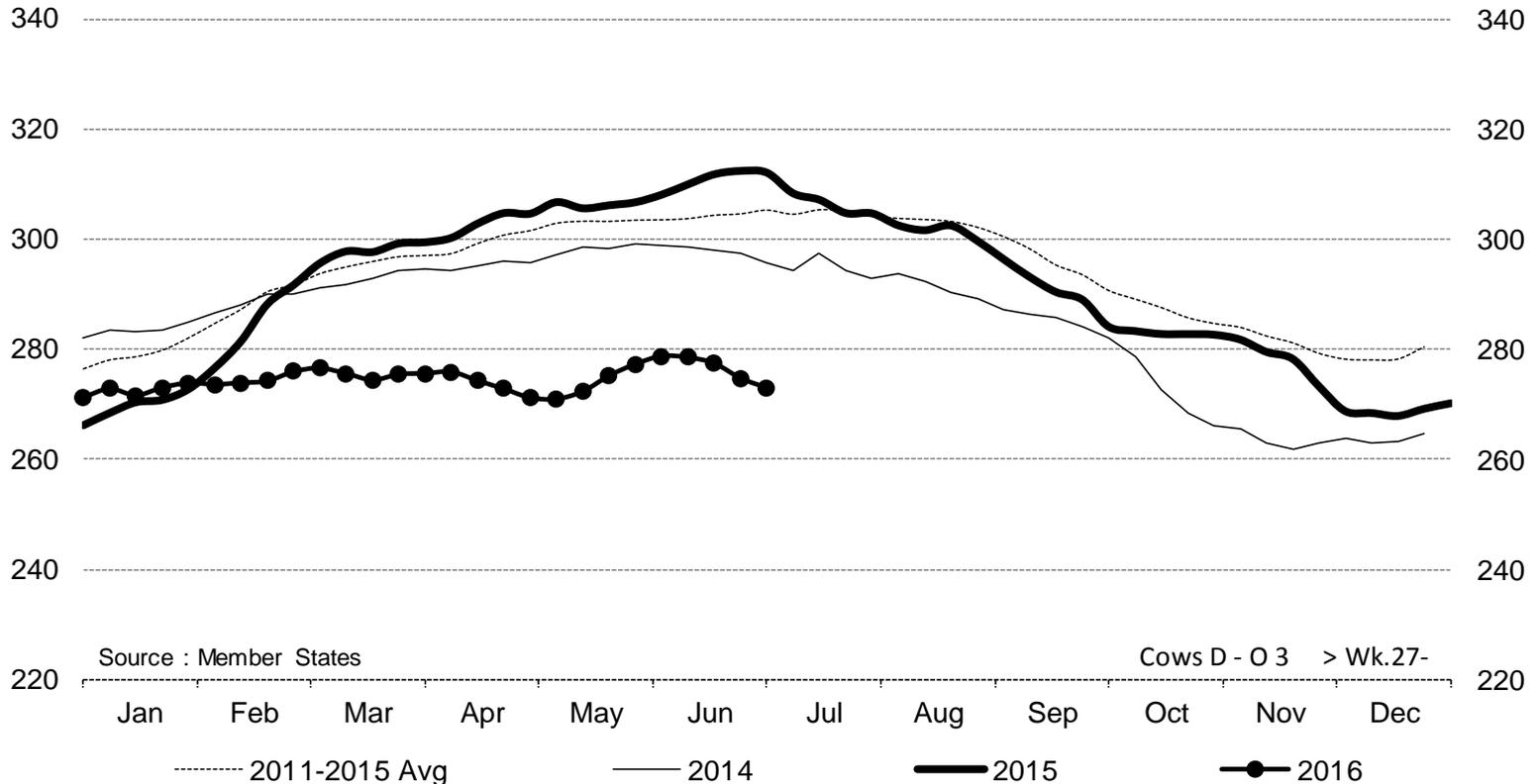
15 July 2016

# PRICES CARCASSES

# EU EVOLUTION COW - D.03



Cows D - O 3 > Wk.27-2016



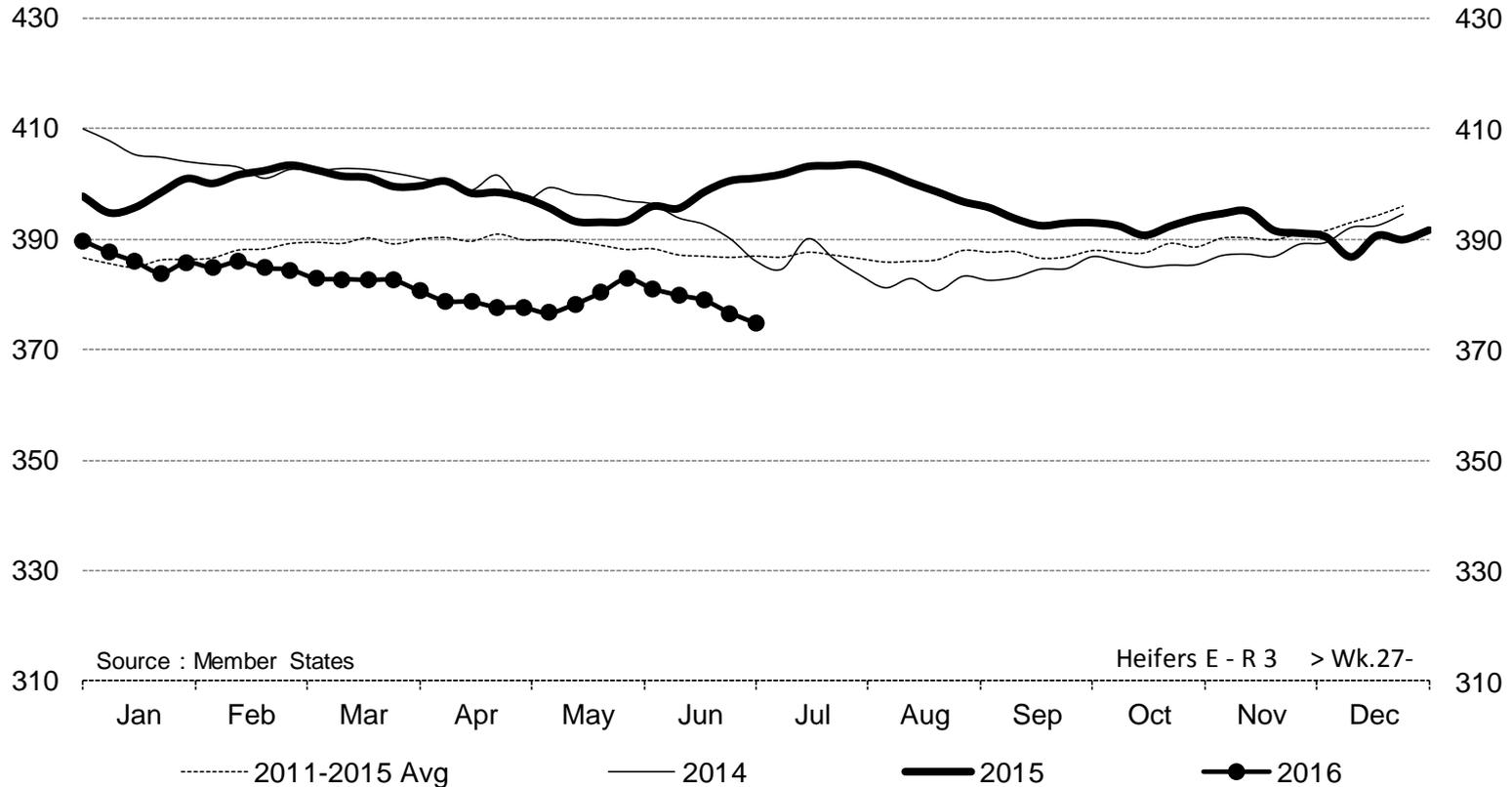
Source : Member States

----- 2011-2015 Avg      — 2014      — 2015      —●— 2016

Price in week 27 : **273.01**      Average price in June 2016 : **277.62**  
 % change y/y : **- 12.5%**      % change y/y : **- 10.6%**

15 July 2016

## Heifers E - R 3 > Wk.27-2016



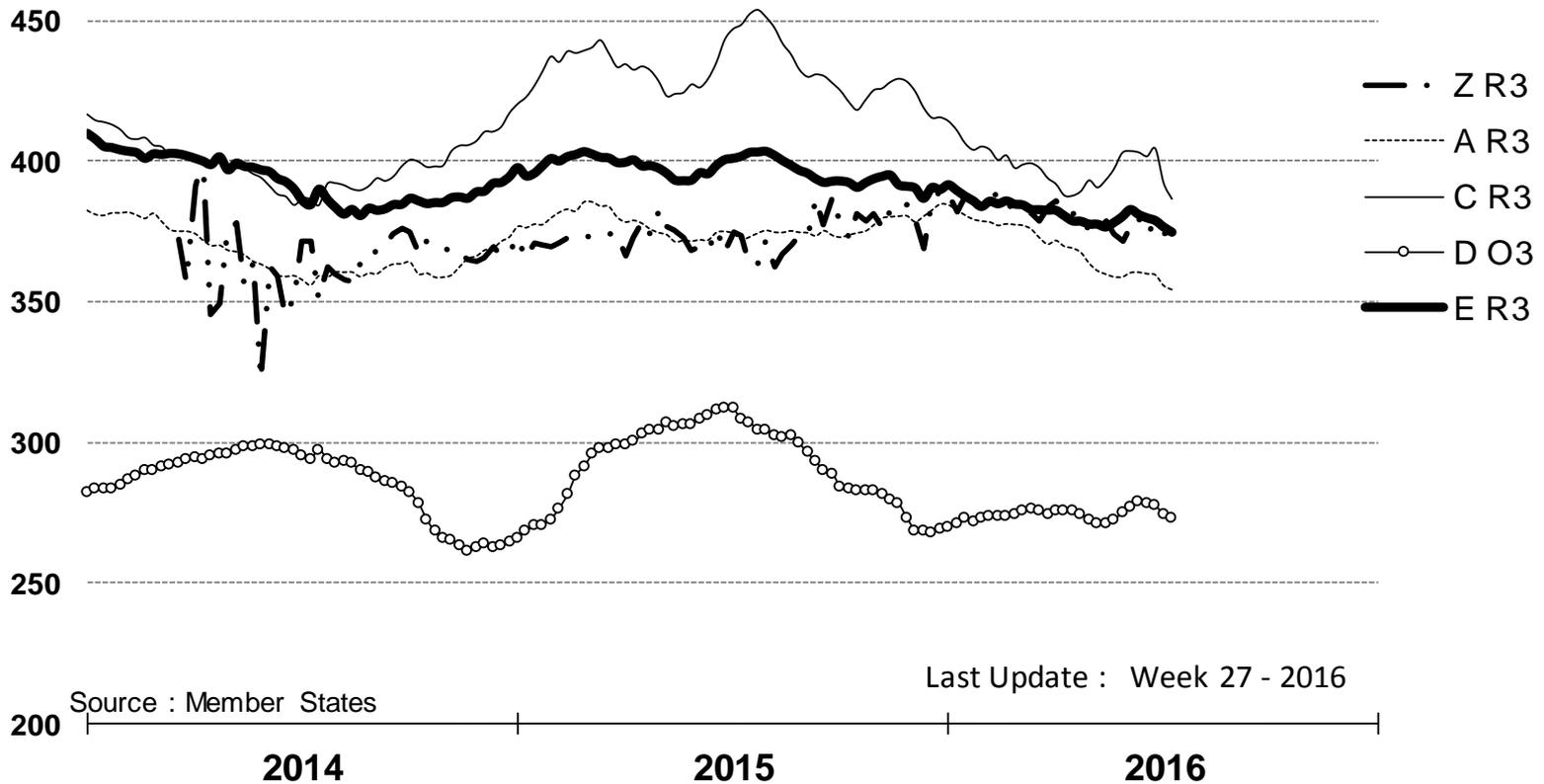
Price in week 27 : **374.80**  
% change y/y : **- 6.5%**

Average price in June 2016 : **379.98**  
% change y/y : **- 4.5%**

15 July 2016

# PRICES CARCASSES

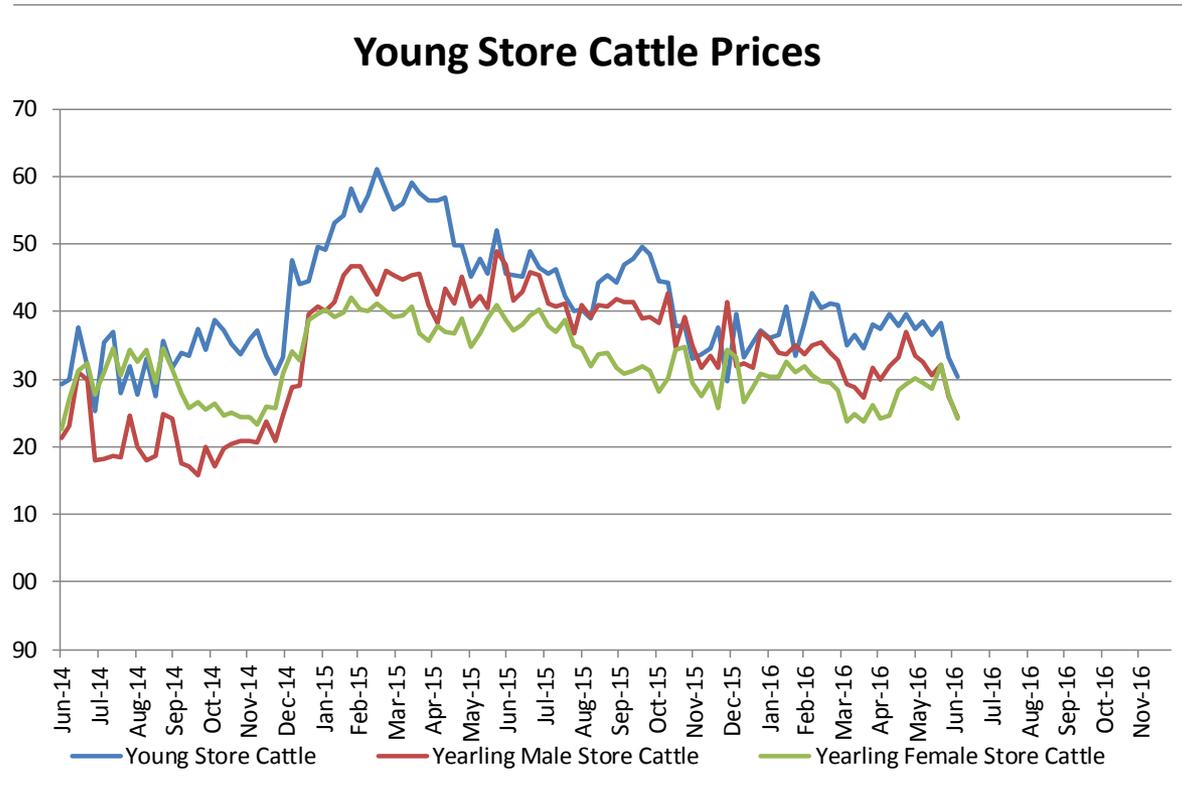
# EU EVOLUTION All CAT GLOBAL VIEW



15 July 2016



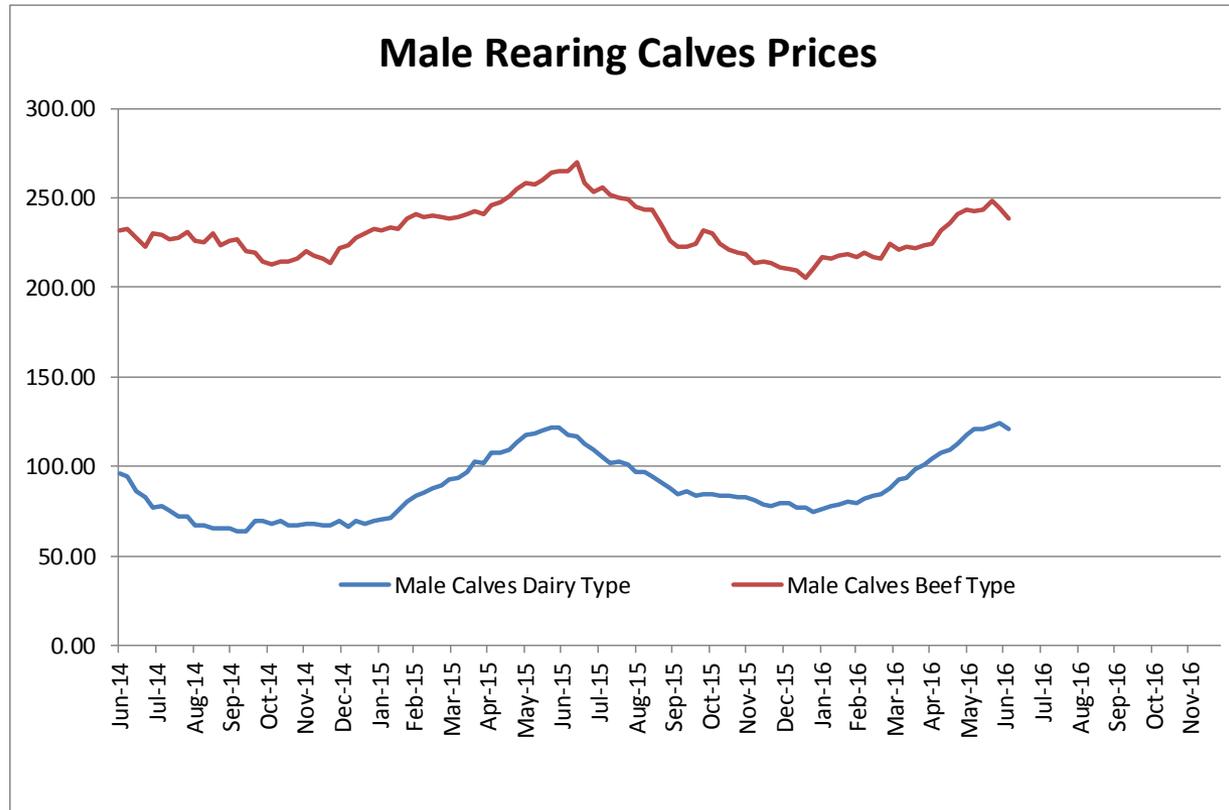
## Store cattle (€/100 kg live weight)



<b>Young Store Cattle Price in</b>	<b>Week 27</b>	<b>2.30</b>	<b>Yearling Male Store Cattle Price</b>	<b>2.24</b>
	Change y/y	-6.16%	Change y/y	-9.17%
<b>Yearling Female Store Cattle Price</b>		<b>2.24</b>		
	Change y/y	-6.18%		

15 July 2016

### Male calves aged between 8 days and 4 weeks (€/head)



#### Male Rearing Calves Beef type

Price in Week 27 **238.48**  
Change y/y -10.12%

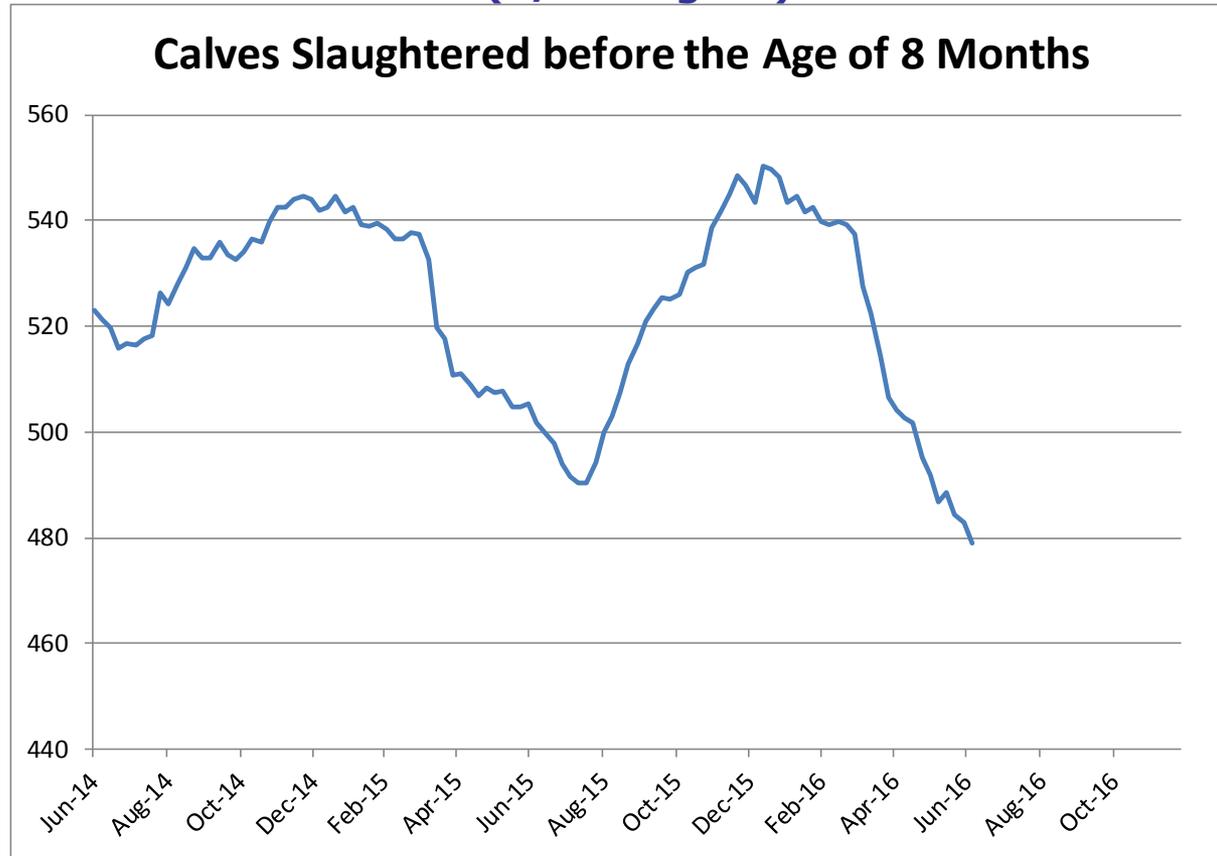
#### Male Rearing Calves Dairy type

Price in Week 27 **121.27**  
Change y/y -0.63%

15 July 2016



## Calves slaughtered before the age of less than 8 months (€/100 kg cw)



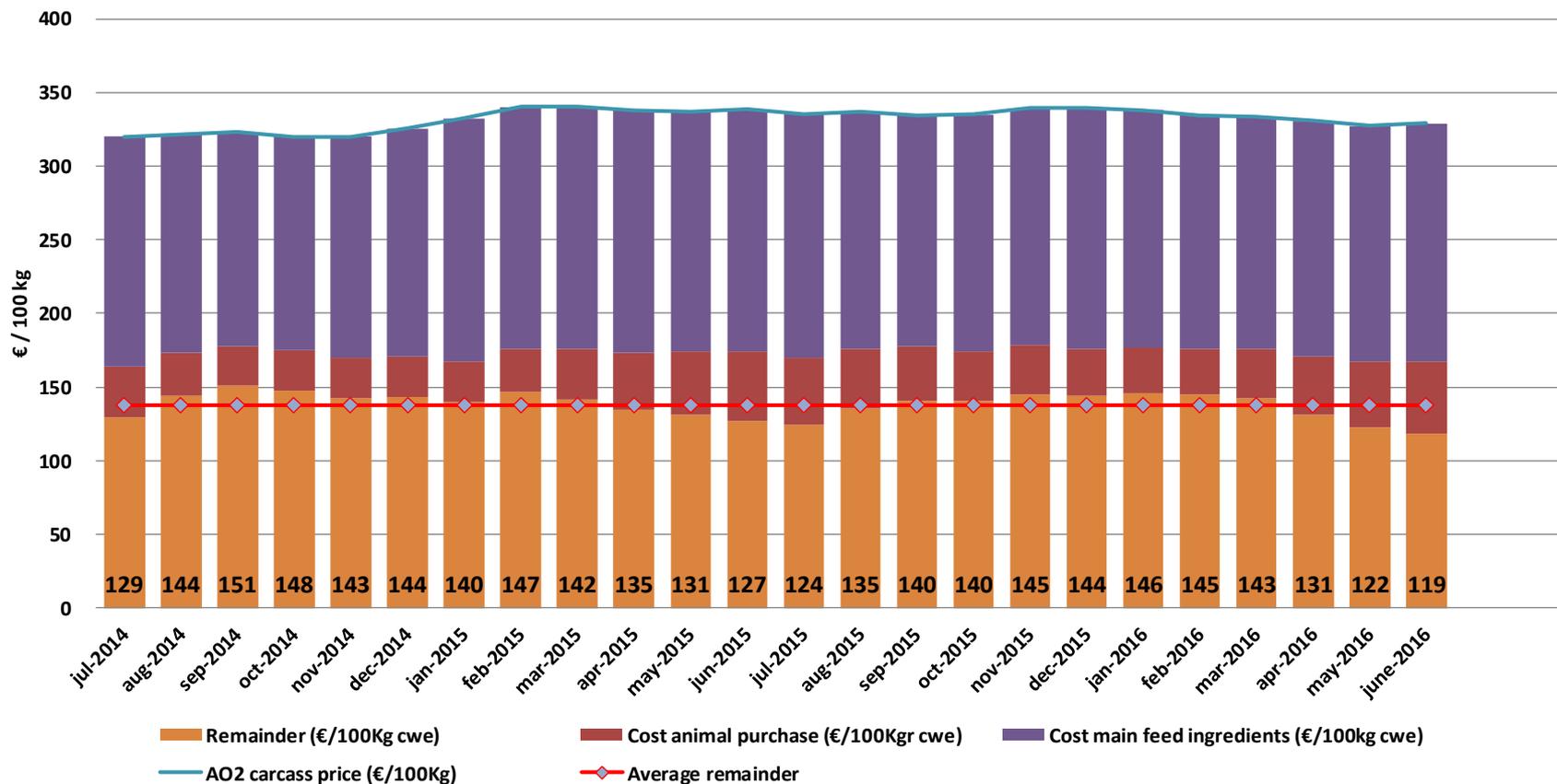
**Price in Week 27**      **479.03 € / 100 kg of carcasse weight**  
Change y/      -5.21%

15 July 2016

# REMAINDERS



## Remainder for dairy calves fattening

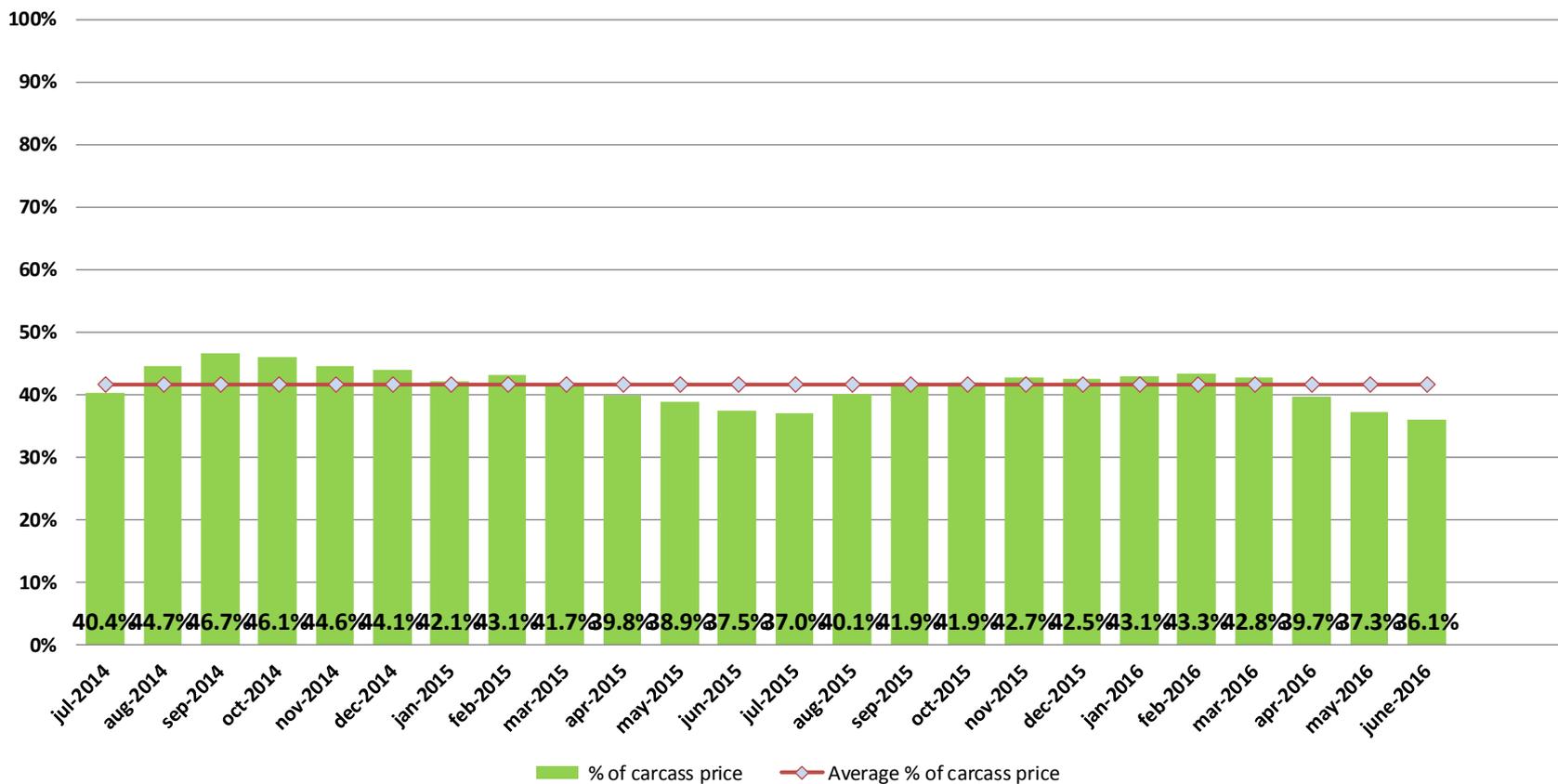


15 July 2016

# REMAINDERS



## Remainder for dairy calves fattening: % of carcass price

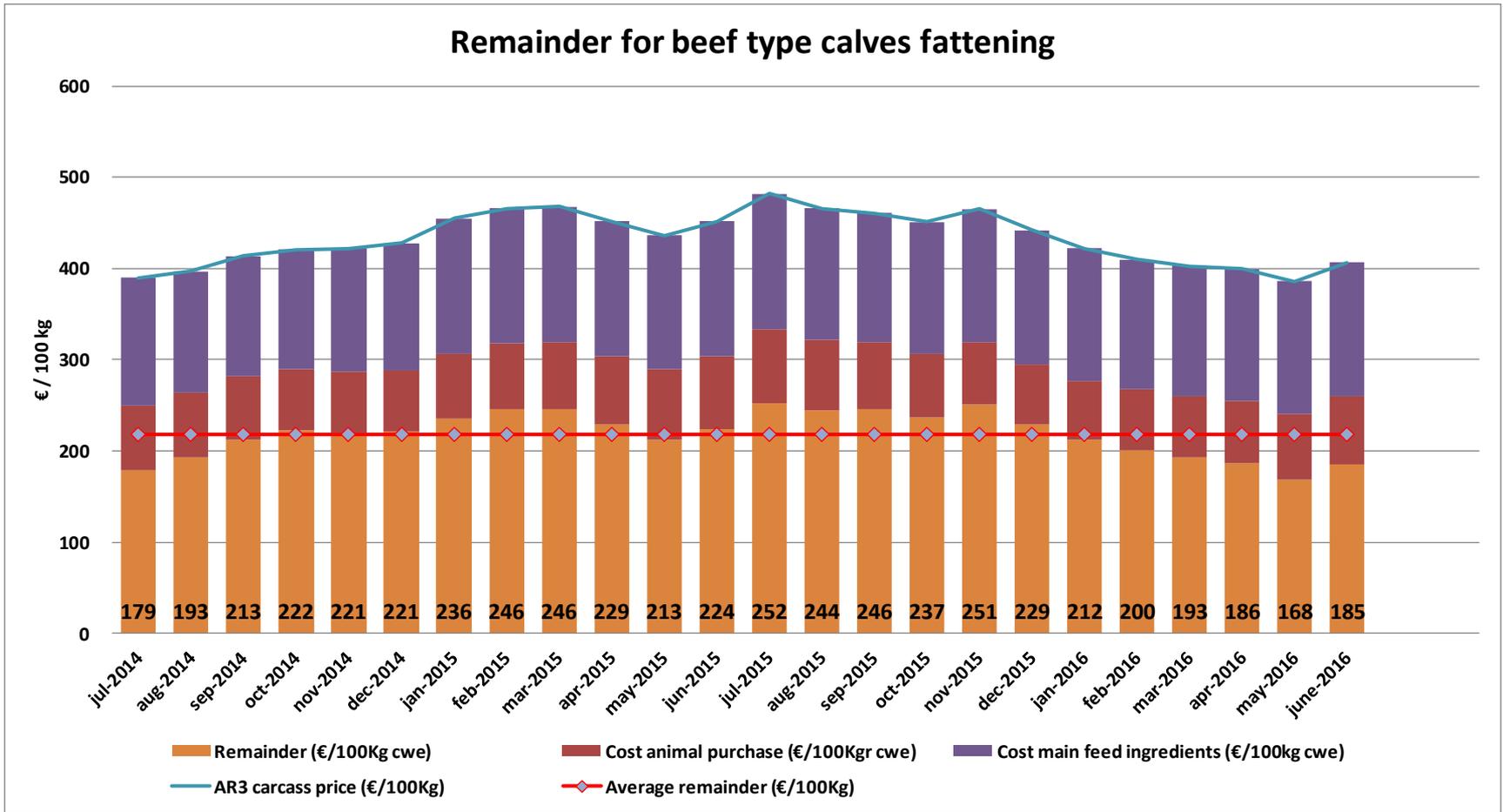


15 July 2016

# REMAINDERS



## Remainder for beef type calves fattening

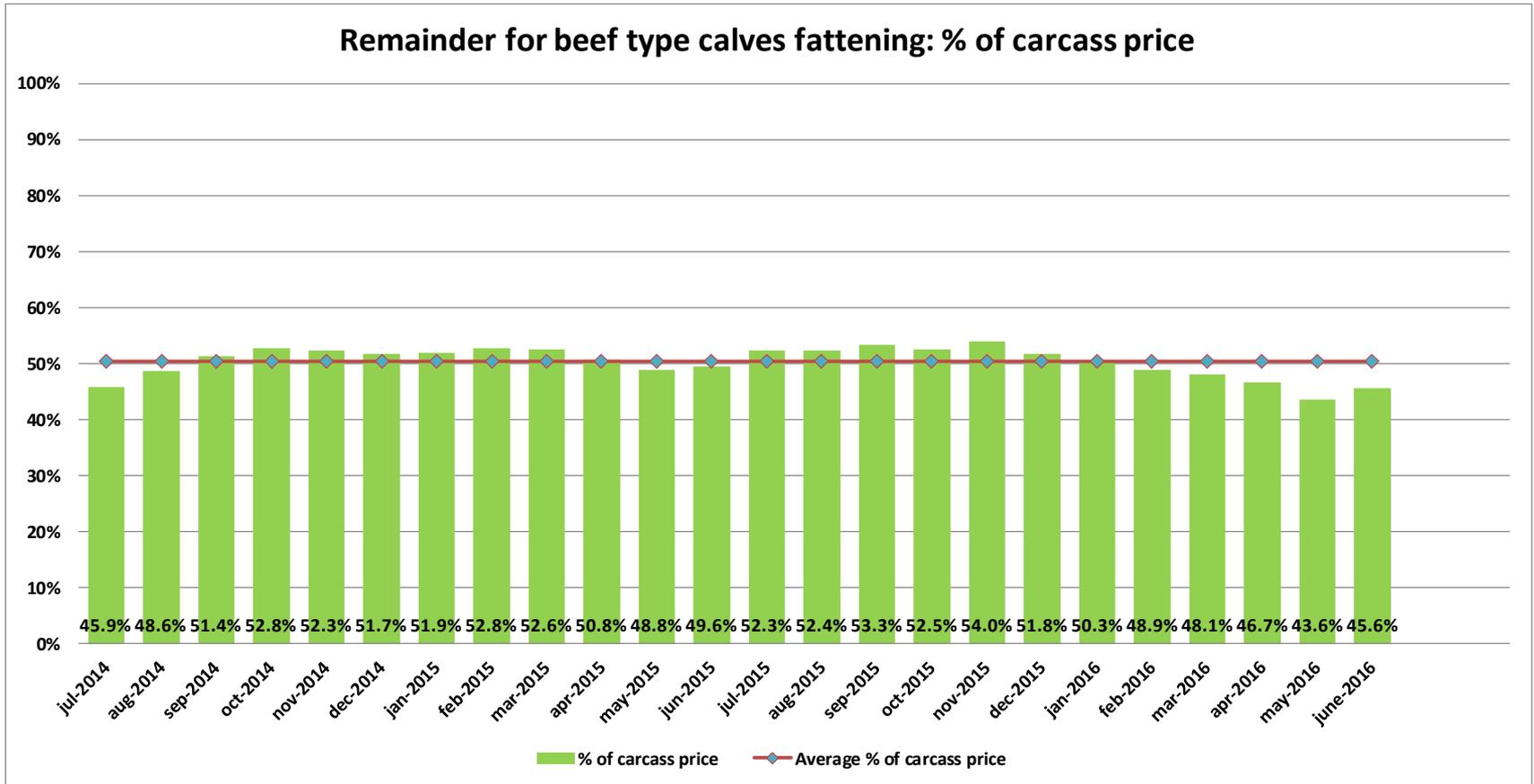


15 July 2016

# REMAINDERS



## Remainder for beef type calves fattening: % of carcass price

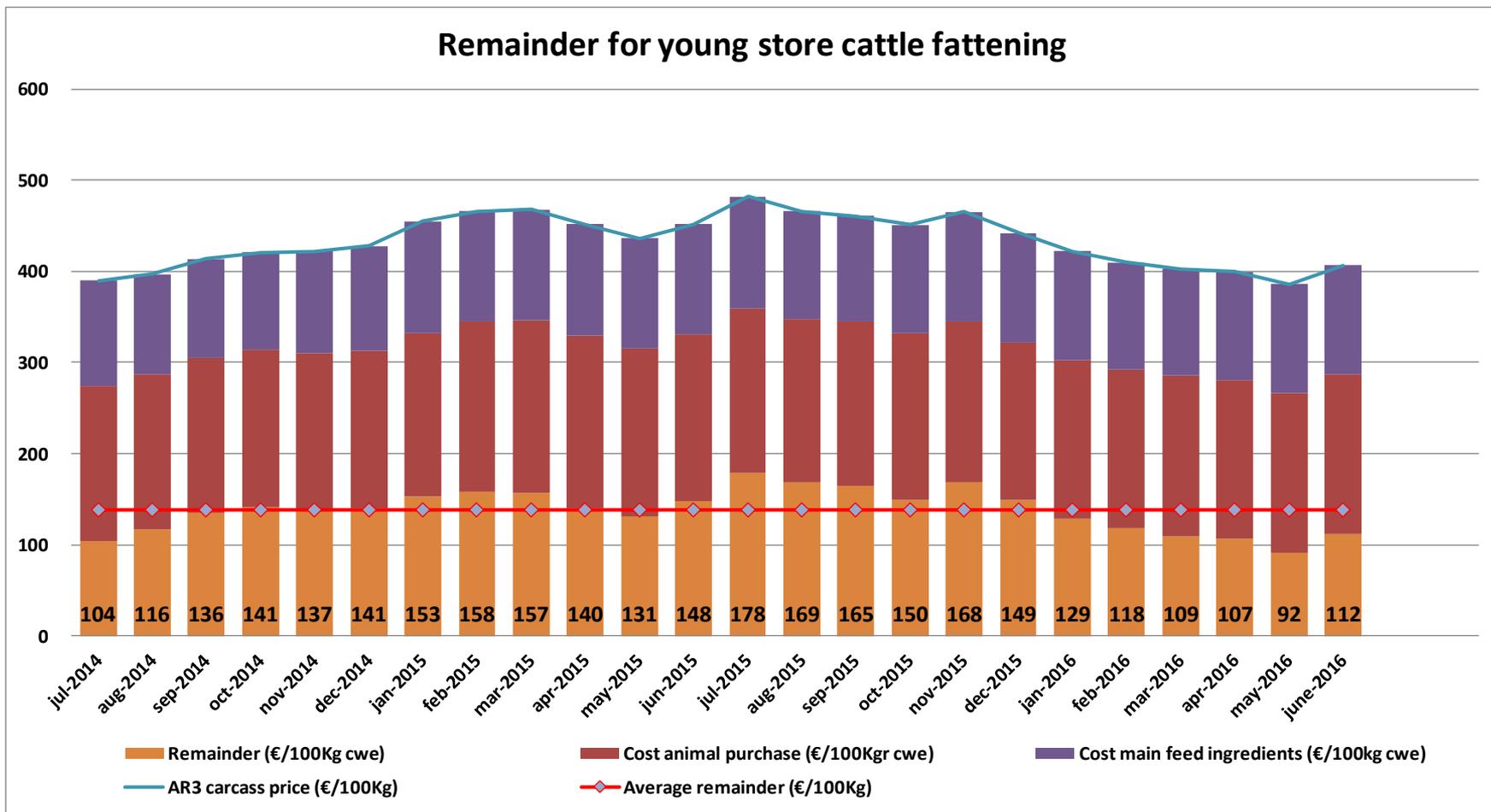


15 July 2016

# REMAINDERS



## Remainder for young store cattle fattening

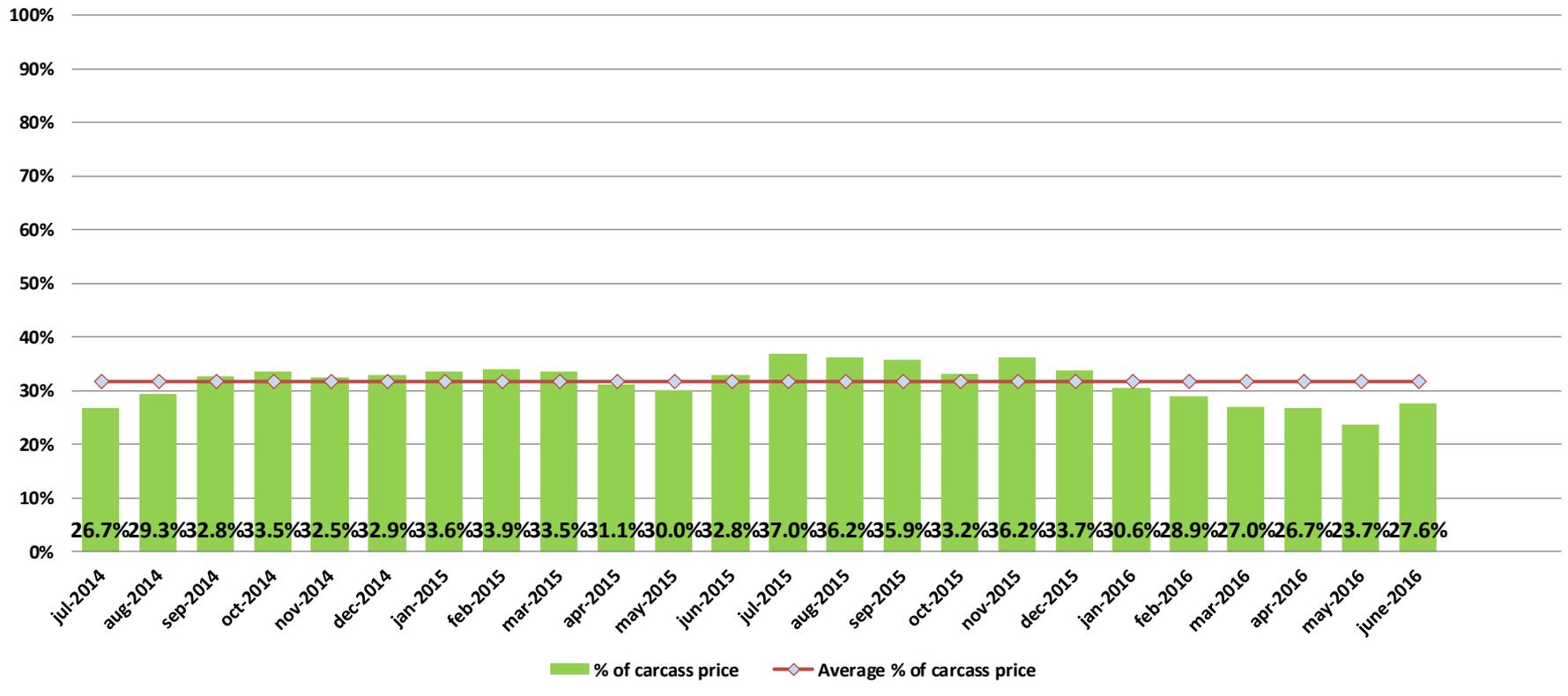


15 July 2016

# REMAINDERS



## Remainder for young store cattle fattening: % of carcass price



15 July 2016

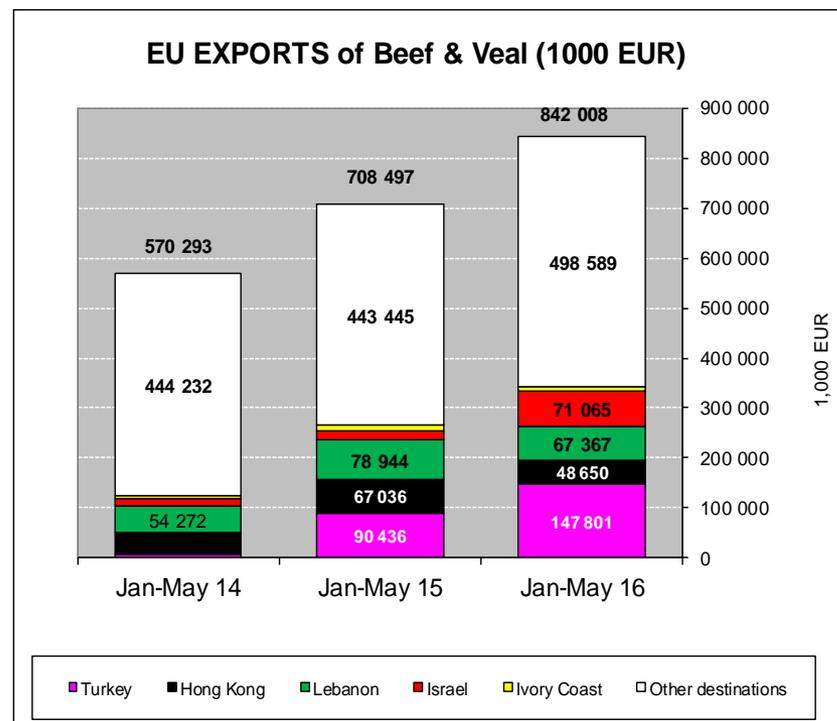
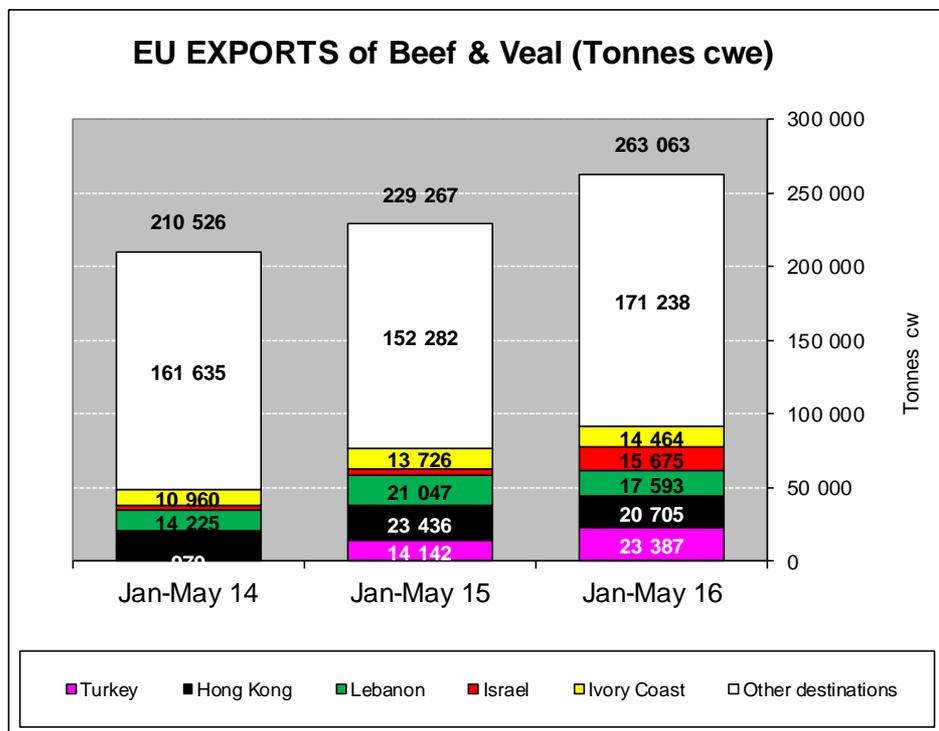


## EU exports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Destinations	2012		2013		2014		2015		Jan-May 16		Compared to Jan-May 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Turkey	101 475	19.6%	5 086	1.1%	8 098	1.4%	57 584	9.6%	23 387	8.9%	+ 65.4%
Hong Kong	17 862	3.4%	28 573	6.3%	65 112	11.6%	45 267	7.6%	20 705	7.9%	- 11.7%
Lebanon	24 099	4.6%	24 007	5.3%	37 984	6.8%	50 287	8.4%	17 593	6.7%	- 16.4%
Israel	8 435	1.6%	9 378	2.1%	8 353	1.5%	18 862	3.1%	15 675	6.0%	+++
Ivory Coast	15 929	3.1%	21 619	4.8%	28 839	5.2%	35 767	6.0%	14 464	5.5%	+ 5.4%
Ghana	28 693	5.5%	40 878	9.0%	33 255	5.9%	37 389	6.2%	14 074	5.3%	- 11.3%
Bosnia-Herz.	14 893	2.9%	24 068	5.3%	34 104	6.1%	40 031	6.7%	12 684	4.8%	- 4.5%
Libya	10 665	2.1%	17 778	3.9%	14 280	2.6%	19 691	3.3%	10 934	4.2%	+ 65.7%
Switzerland	19 573	3.8%	26 347	5.8%	26 634	4.8%	26 038	4.3%	10 550	4.0%	- 7.0%
Norway	14 620	2.8%	10 222	2.3%	7 879	1.4%	19 129	3.2%	9 923	3.8%	+ 1.4%
Algeria	17 323	3.3%	25 911	5.7%	18 499	3.3%	16 085	2.7%	9 672	3.7%	+ 14.7%
Vietnam	3 042	0.6%	3 175	0.7%	6 410	1.1%	11 627	1.9%	8 730	3.3%	+++
Philippines	2 028	0.4%	2 730	0.6%	11 839	2.1%	13 116	2.2%	6 969	2.6%	+ 32.4%
Egypt	1 305	0.3%	2 592	0.6%	2 763	0.5%	9 835	1.6%	6 736	2.6%	+++
Russia	97 828	18.9%	72 281	16.0%	96 928	17.3%	13 643	2.3%	4 455	1.7%	+ 27.4%
For.JRep.Mac	11 321	2.2%	10 577	2.3%	11 370	2.0%	12 562	2.1%	4 352	1.7%	- 3.3%
South Africa	5 884	1.1%	3 263	0.7%	3 339	0.6%	0	0.0%	3 810	1.4%	+ 1.9%
Other Destinations	129 605	25.0%	127 315	28.1%	146 892	26.3%	172 539	28.8%	72 160	27.4%	
Extra-EU	518 694		452 537		559 238		599 454		263 063		
% change			- 13%		+ 24%		+ 7%		+ 14.7%		



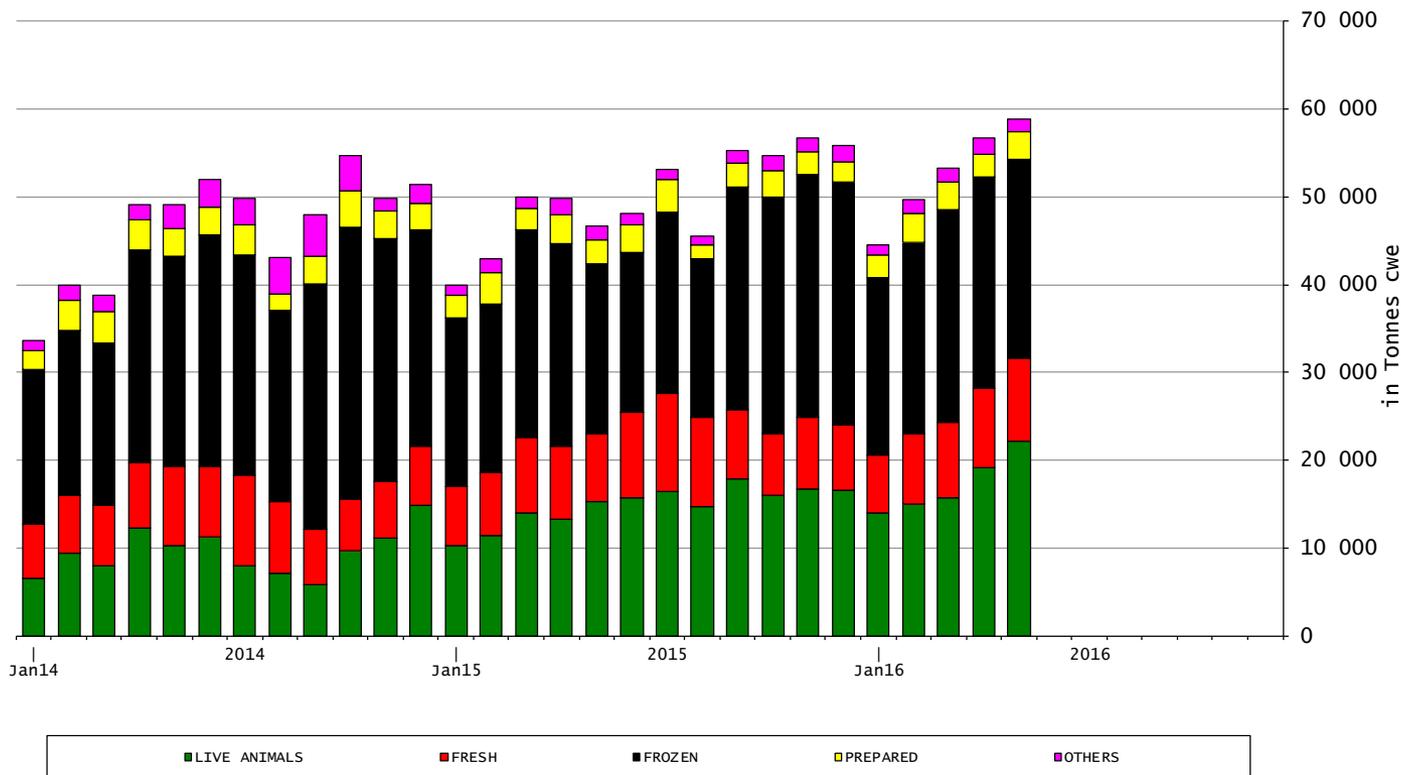
## EU exports of beef and live animals: Trade figures (COMEXT)





European  
Commission

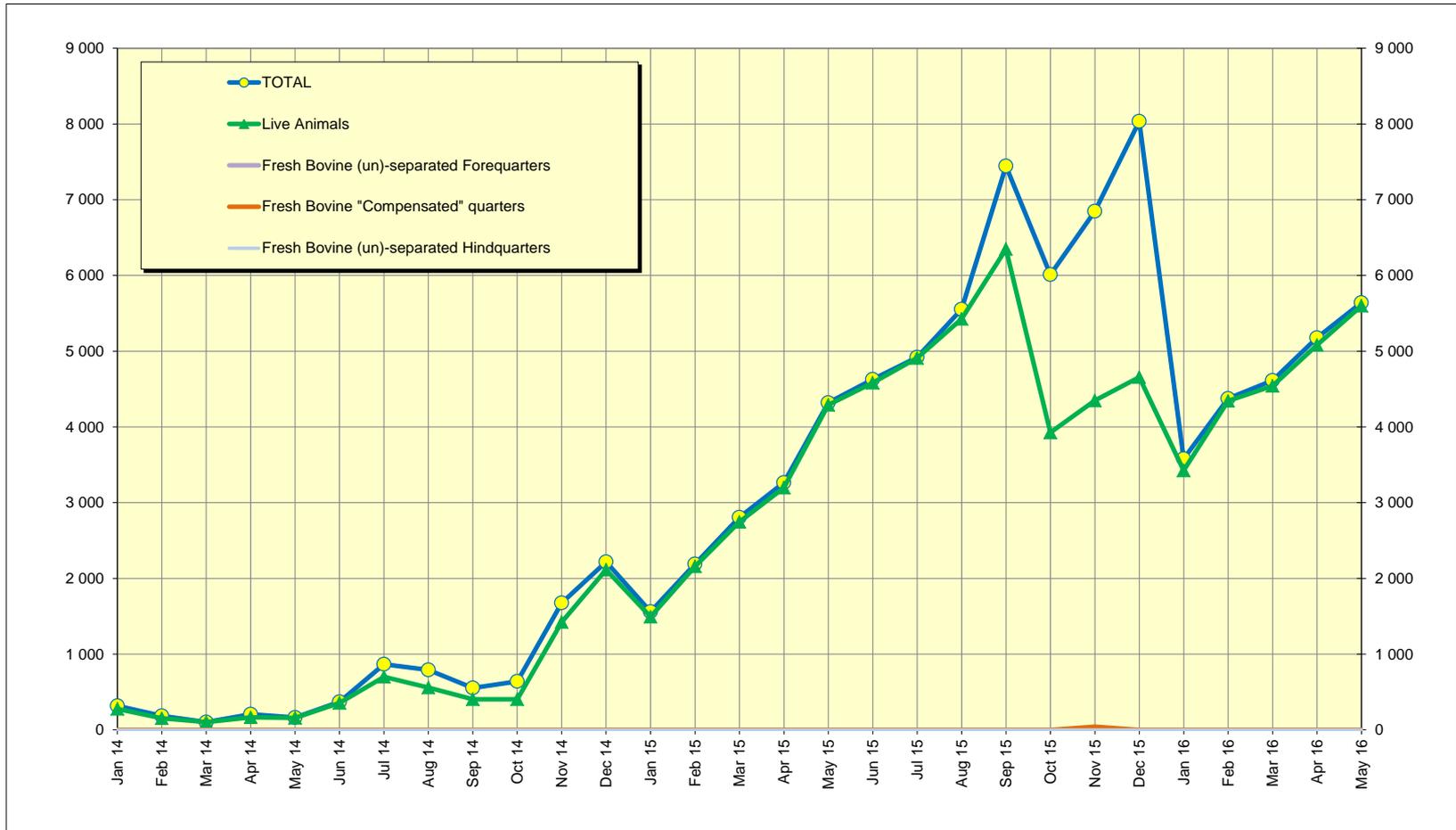
## EU-28 Exports of BEEF products



15 July 2016



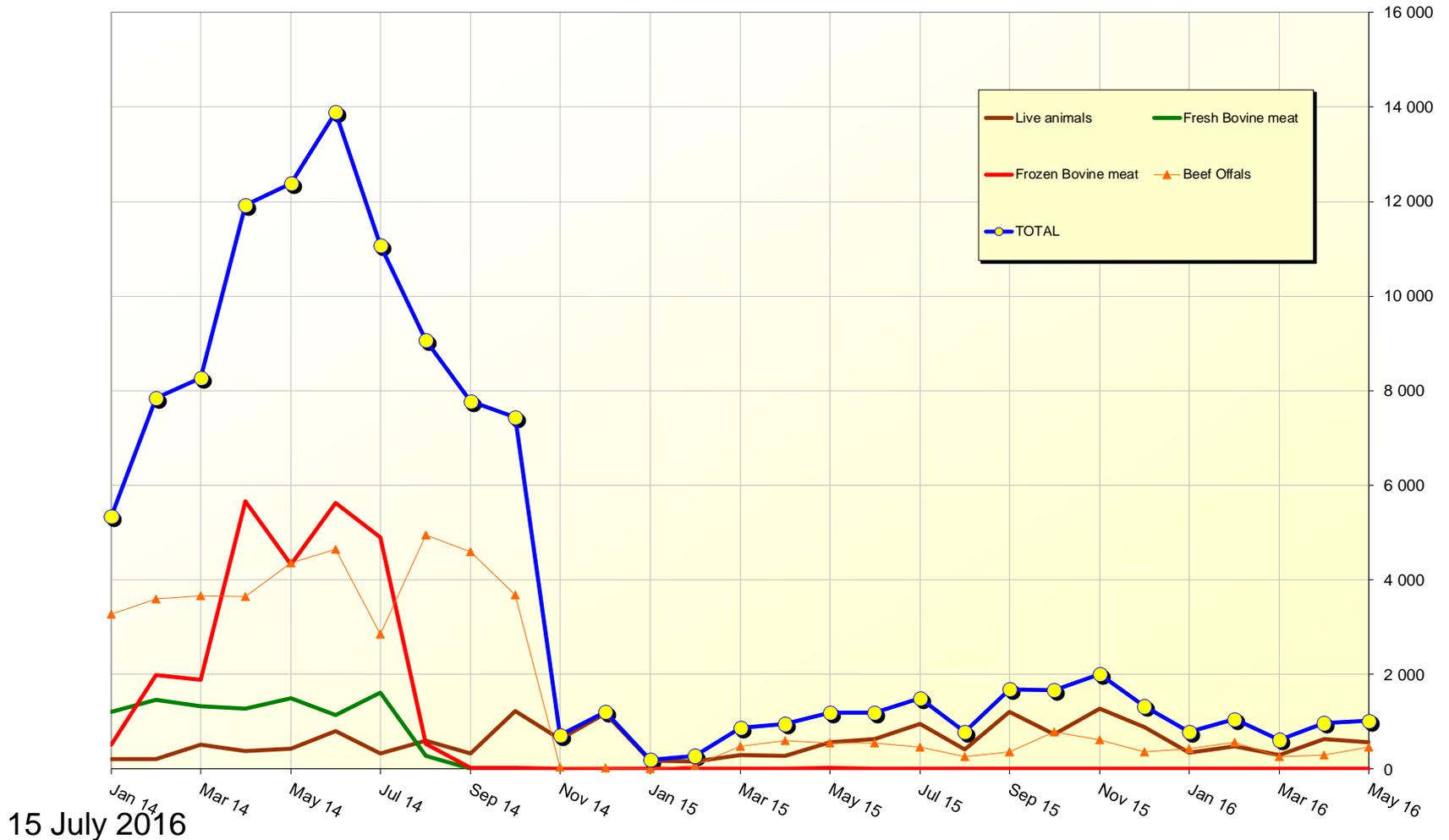
## EU beef Exports to TURKEY Trade figures (COMEXT data) tonnes cwe



15 July 2016



## EU beef Exports to RUSSIA Trade figures (COMEXT data) tonnes cwe



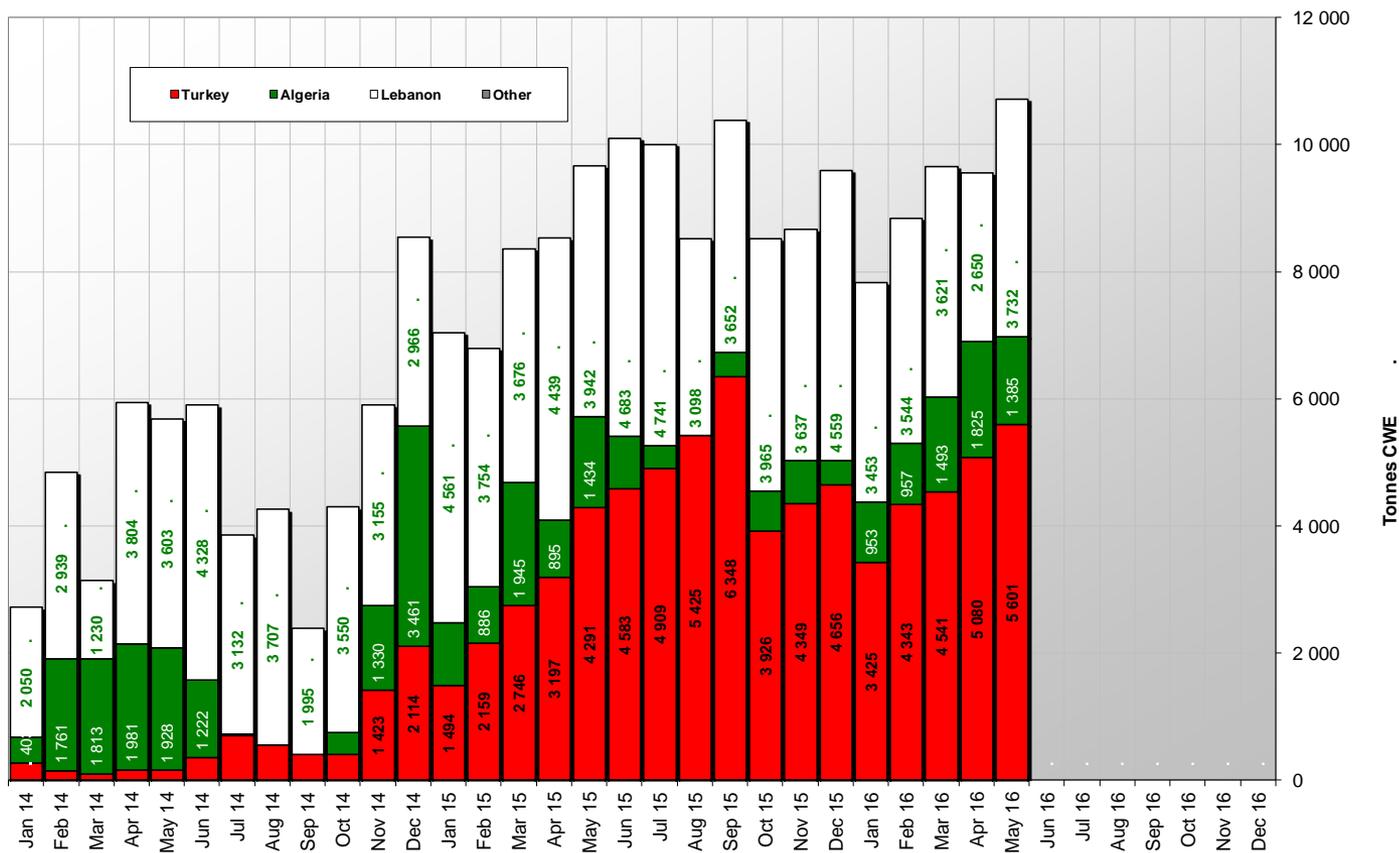
15 July 2016



European  
Commission

## EU-28 Exports of LIVE Bovine Animals

(Source COMEXT - Tonnes cwe)

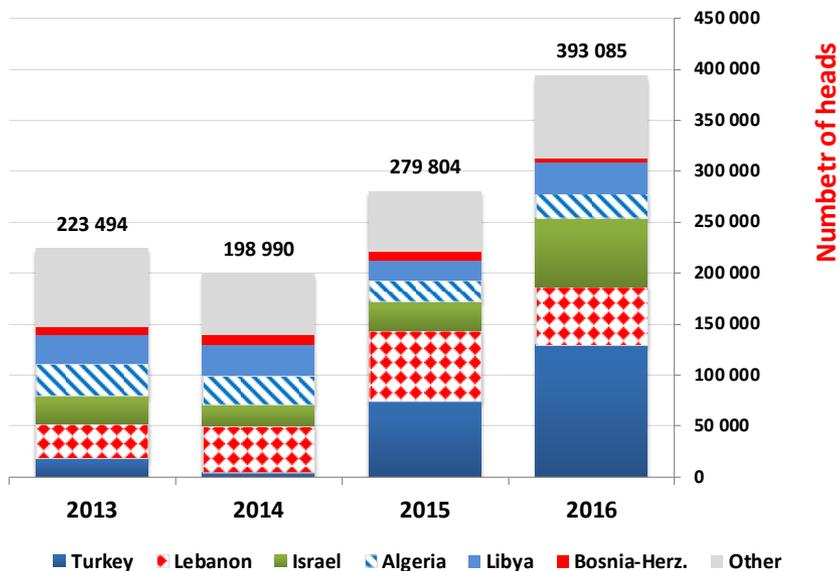


15 July 2016

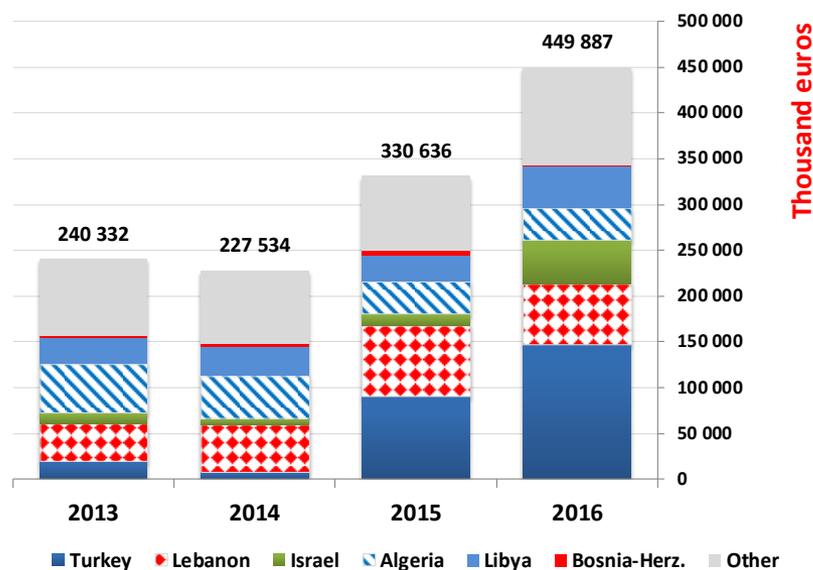


European  
Commission

EU Exports of BEEF live animals by partner for the period Jan-May 2016



EU Exports of BEEF live animals by partner for the period Jan-May 2016



15 July 2016



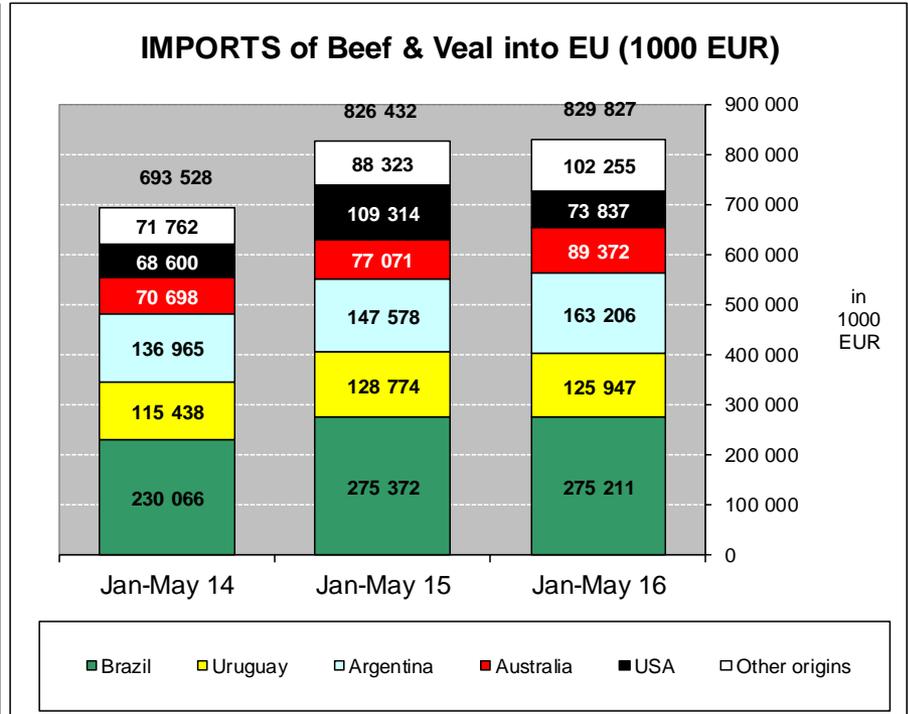
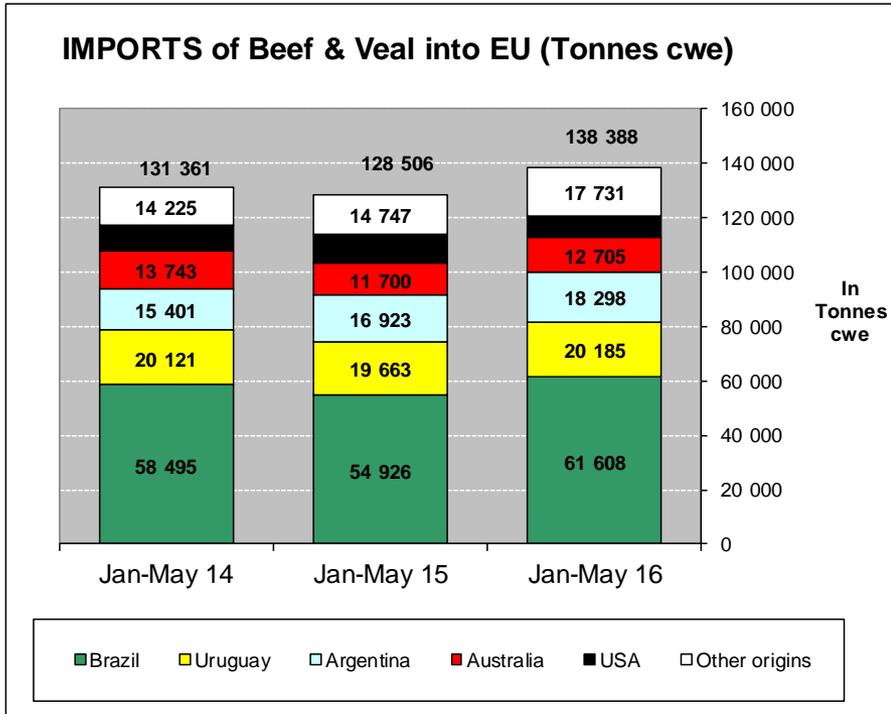
## EU imports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Origins	2012		2013		2014		2015		Jan-May 16		Compared to Jan-May 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	126 344	41.1%	145 435	43.5%	144 259	43.4%	136 705	42.4%	61 608	44.5%	+ 12.2%
Uruguay	51 996	16.9%	51 377	15.4%	49 043	14.8%	46 301	14.3%	20 185	14.6%	+ 2.7%
Argentina	51 693	16.8%	47 976	14.3%	42 074	12.7%	42 135	13.1%	18 298	13.2%	+ 8.1%
Australia	21 290	6.9%	28 074	8.4%	32 653	9.8%	30 879	9.6%	12 705	9.2%	+ 8.6%
USA	21 095	6.9%	22 297	6.7%	23 234	7.0%	24 075	7.5%	7 861	5.7%	- 25.5%
New Zealand	15 181	4.9%	13 827	4.1%	14 432	4.3%	11 369	3.5%	4 680	3.4%	- 3.2%
Botswana	474	0.2%	6 280	1.9%	6 424	1.9%	9 258	2.9%	4 151	3.0%	+ 24.7%
Namibia	8 848	2.9%	11 113	3.3%	9 994	3.0%	12 140	3.8%	3 269	2.4%	+ 0.9%
Paraguay	101	0.0%	0	0.0%	0	0.0%	1 915	0.6%	2 266	1.6%	+++
Switzerland	4 946	1.6%	4 284	1.3%	5 456	1.6%	5 089	1.6%	2 254	1.6%	+ 11.4%
Chile	1 711	0.6%	537	0.2%	875	0.3%	710	0.2%	223	0.2%	- 26.0%
Serbia	641	0.2%	619	0.2%	425	0.1%	439	0.1%	192	0.1%	+ 6.1%
Norway	159	0.1%	201	0.1%	347	0.1%	480	0.1%	159	0.1%	- 42.9%
Canada	825	0.3%	965	0.3%	780	0.2%	428	0.1%	142	0.1%	- 38.6%
Japan	0	0.0%	3	0.0%	100	0.0%	216	0.1%	76	0.1%	- 5.1%
Hong Kong	10	0.0%	0	0.0%	0	0.0%	0	0.0%	50	0.0%	+++
N.det.Extra	1	0.0%	0	0.0%	230	0.1%	51	0.0%	45	0.0%	+ 84.1%
Other Origins	2 391	0.8%	1 641	0.5%	2 035	0.6%	565	0.2%	224	0.2%	
Extra-EU	307 707		334 630		332 361		322 753		138 388		
% change			+ 9%		- 1%		- 3%		+ 7.7%		

15 July 2016

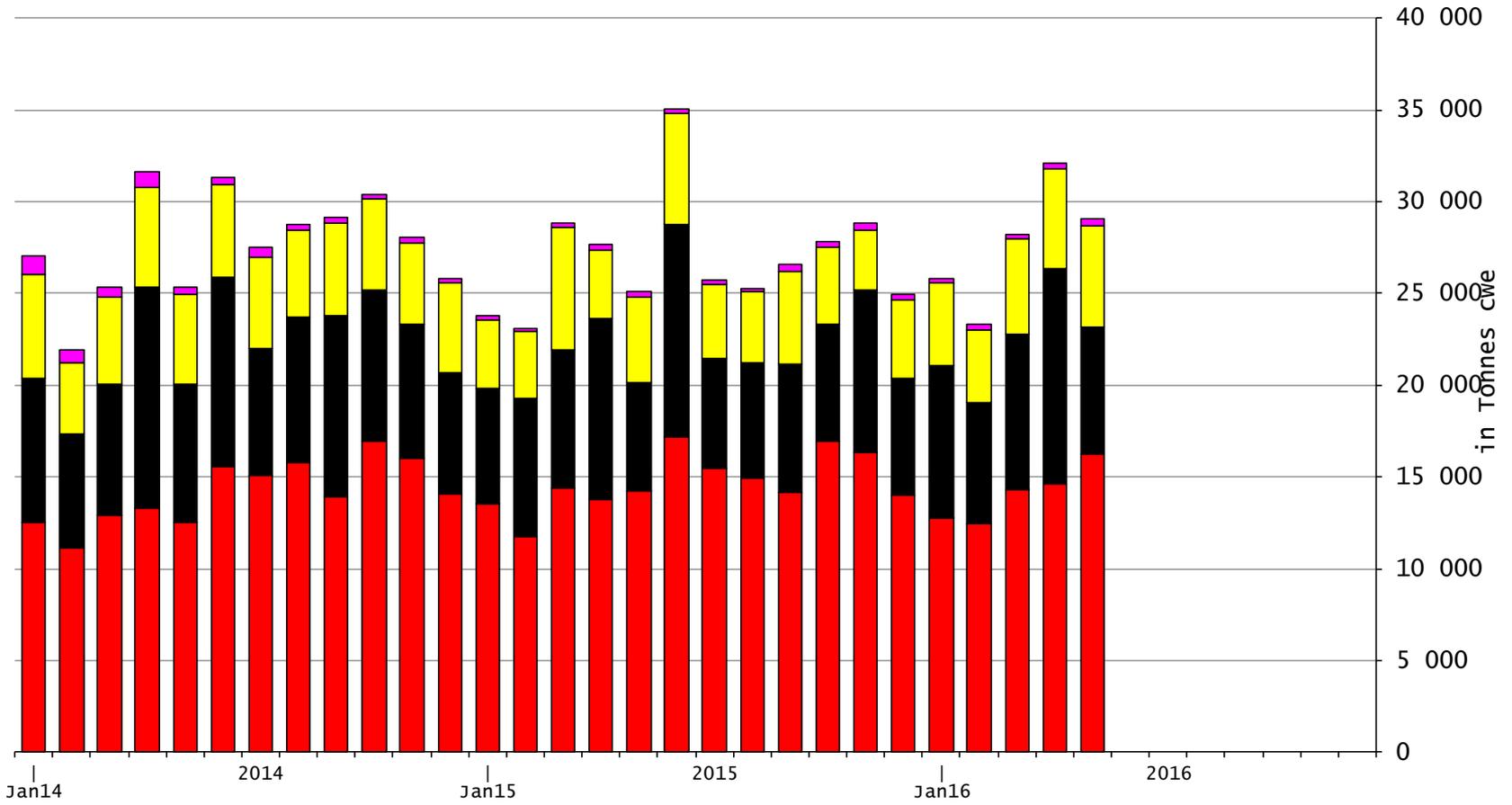


## EU imports of beef and live animals (2): Trade figures (COMEXT)





## EU-28 Imports of BEEF products

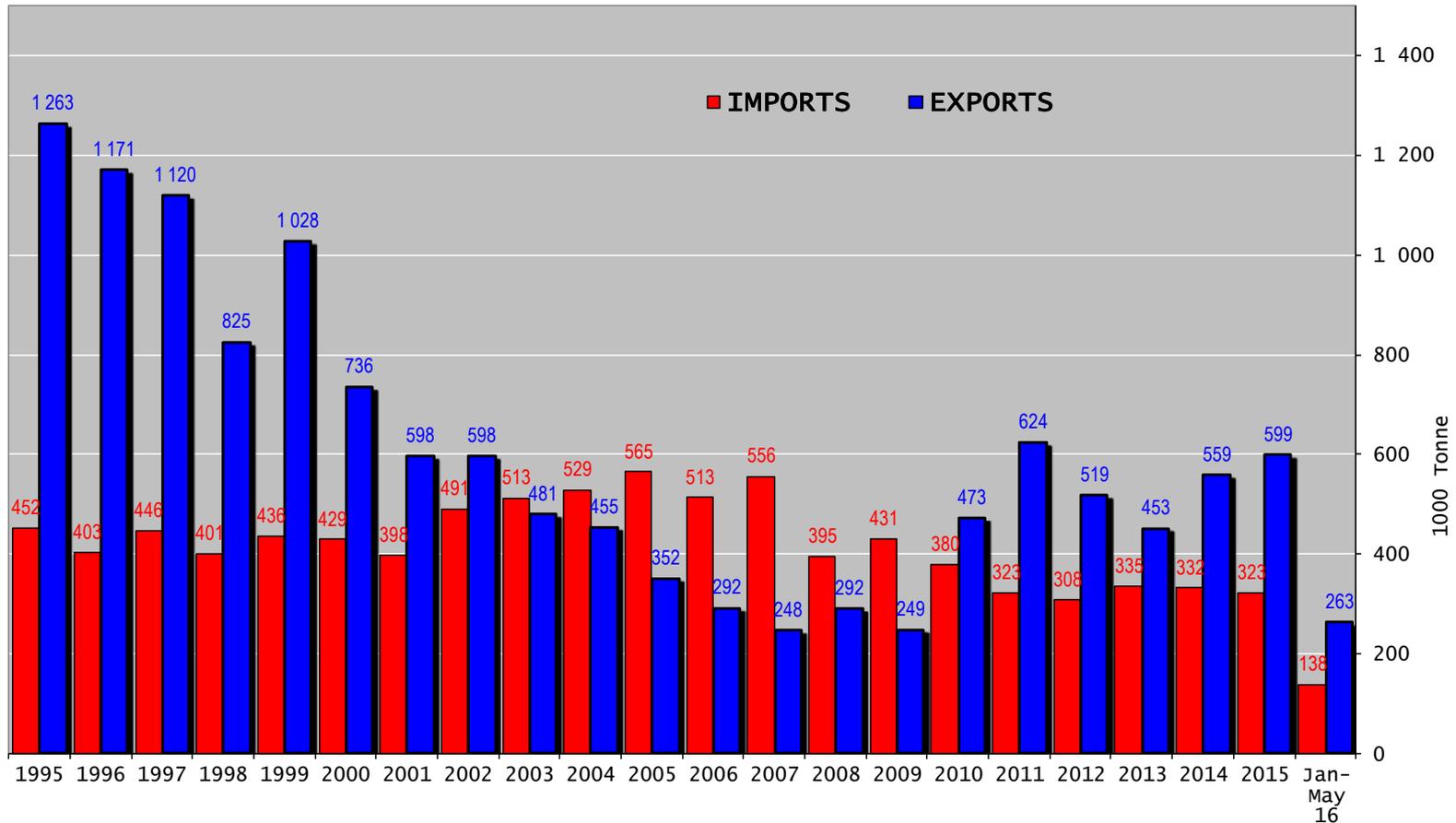


15 July 2016

FRESH FROZEN PREPARED OTHERS



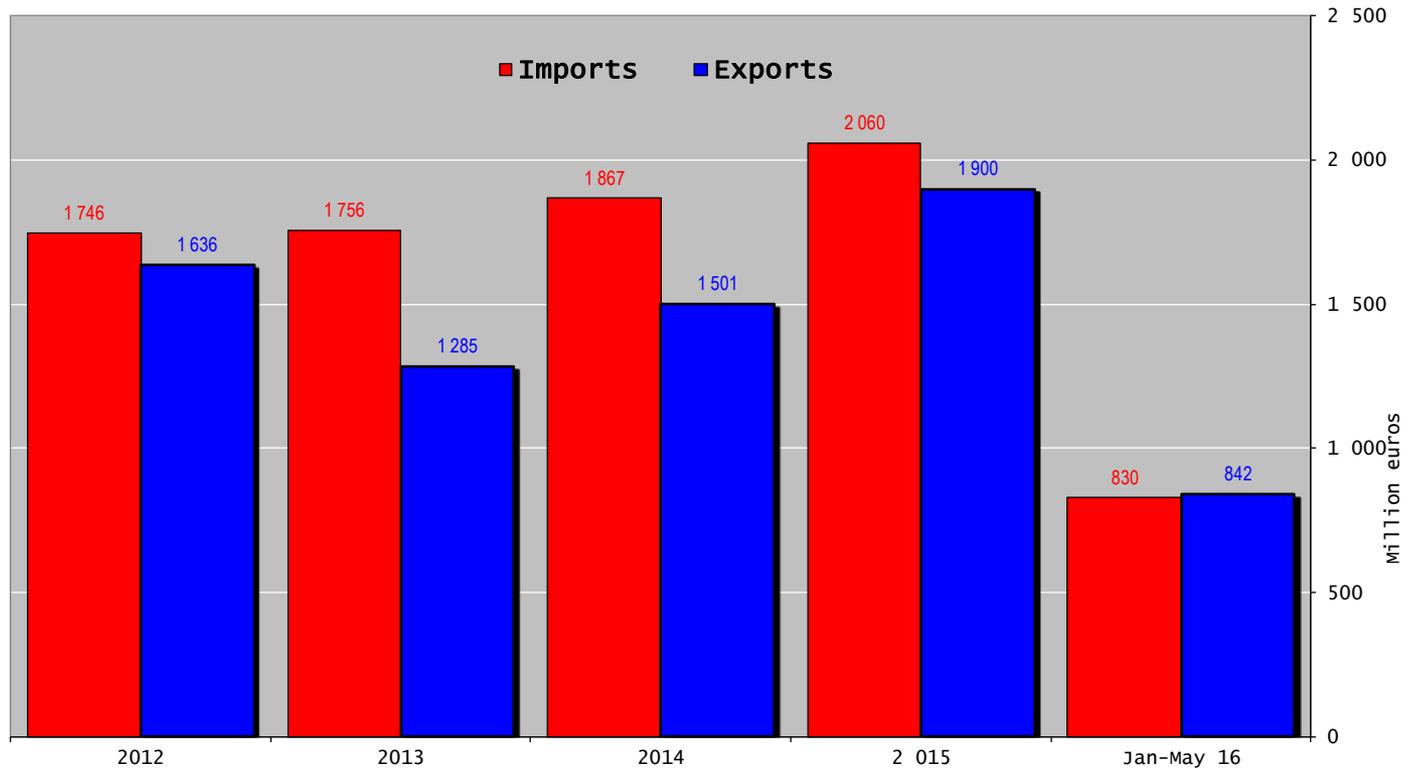
### Trade balance of beef and live animals



15 July 2016



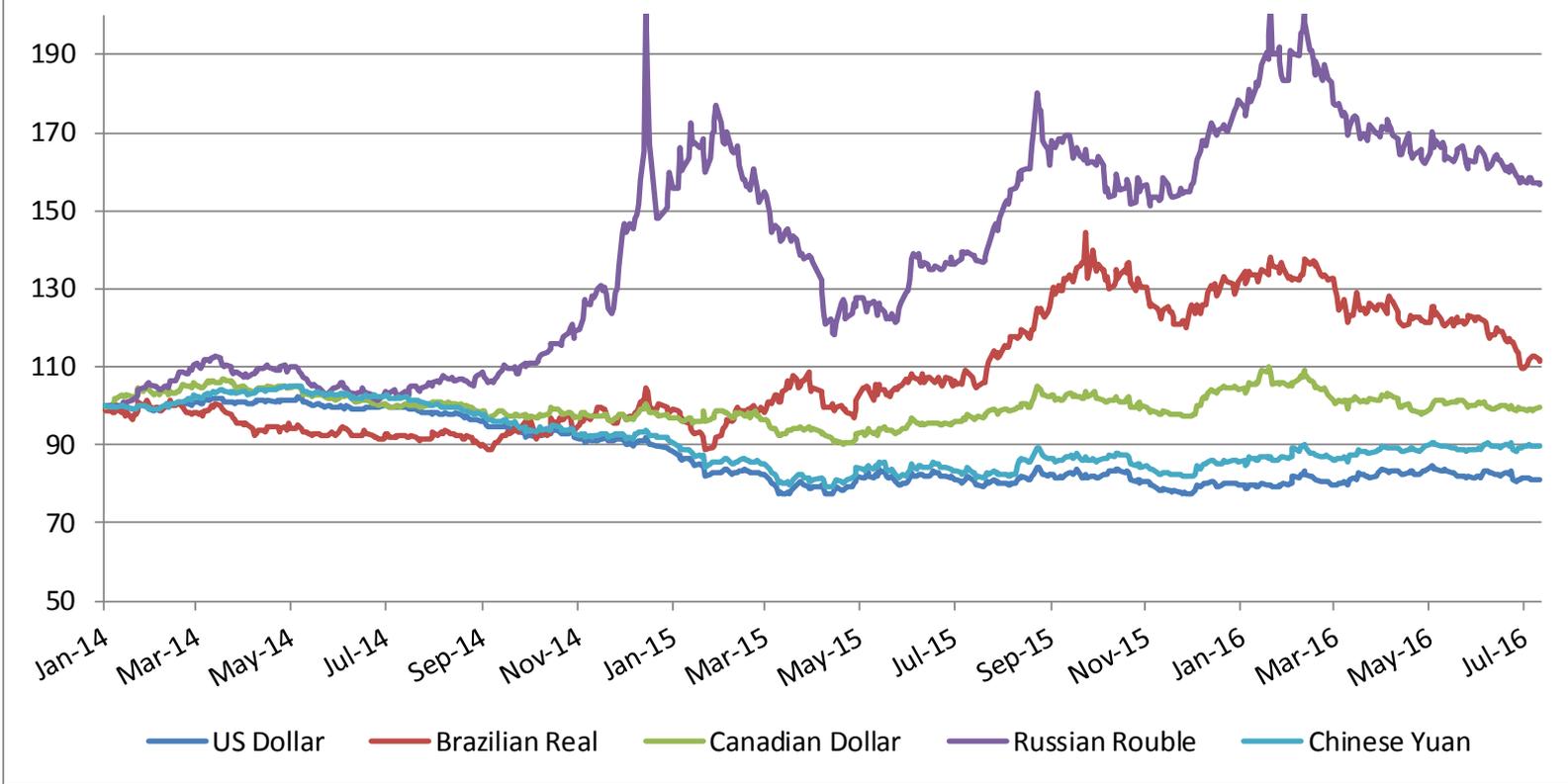
## Trade balance of beef and live animals



15 July 2016



### Index of daily exchange rates of the main trading partners compared to the Euro (02/01/14 = 100)



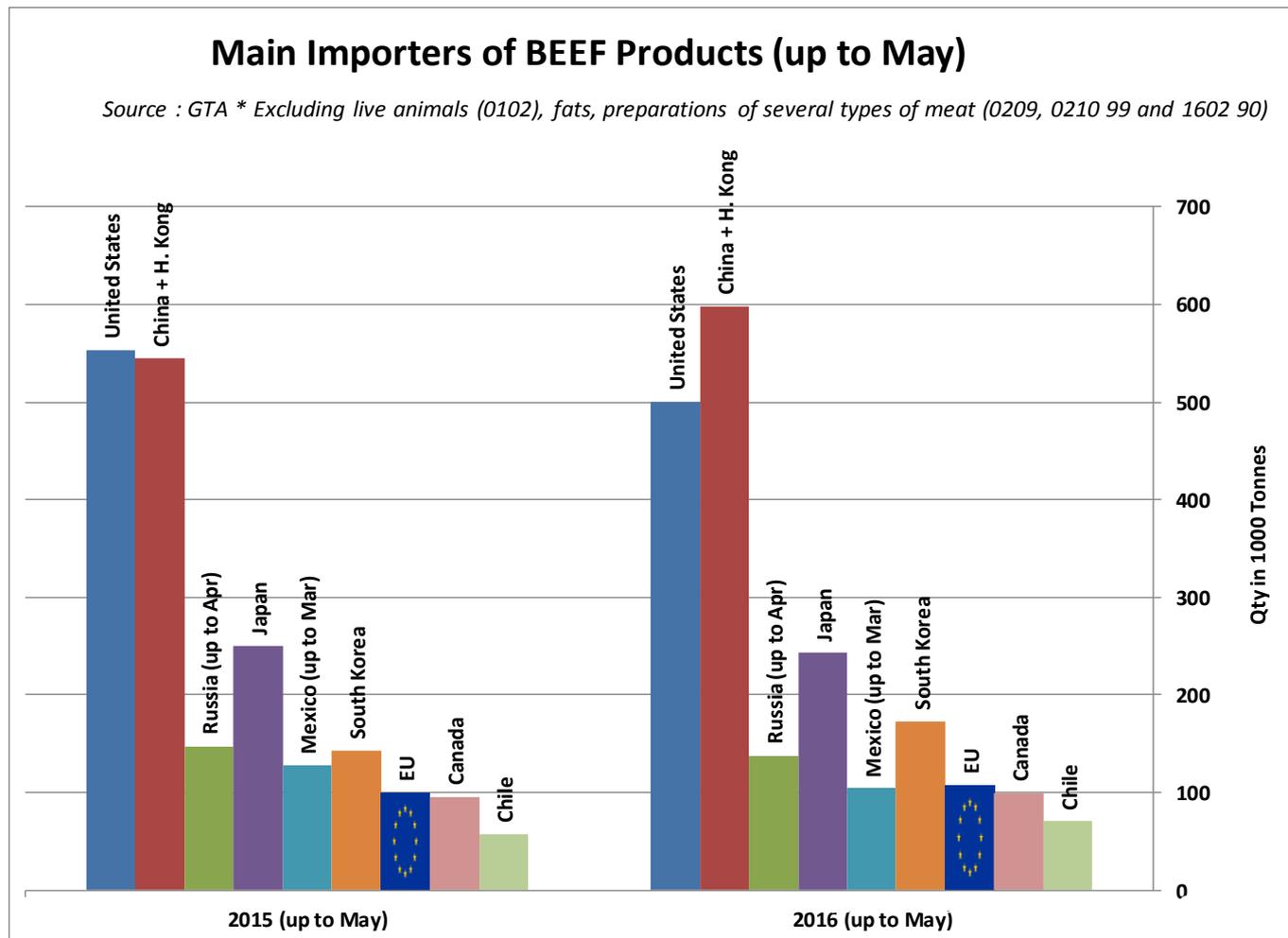
15 July 2016



Source : GTA \* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)

## Main Importers of BEEF Products (up to May)

Source : GTA \* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



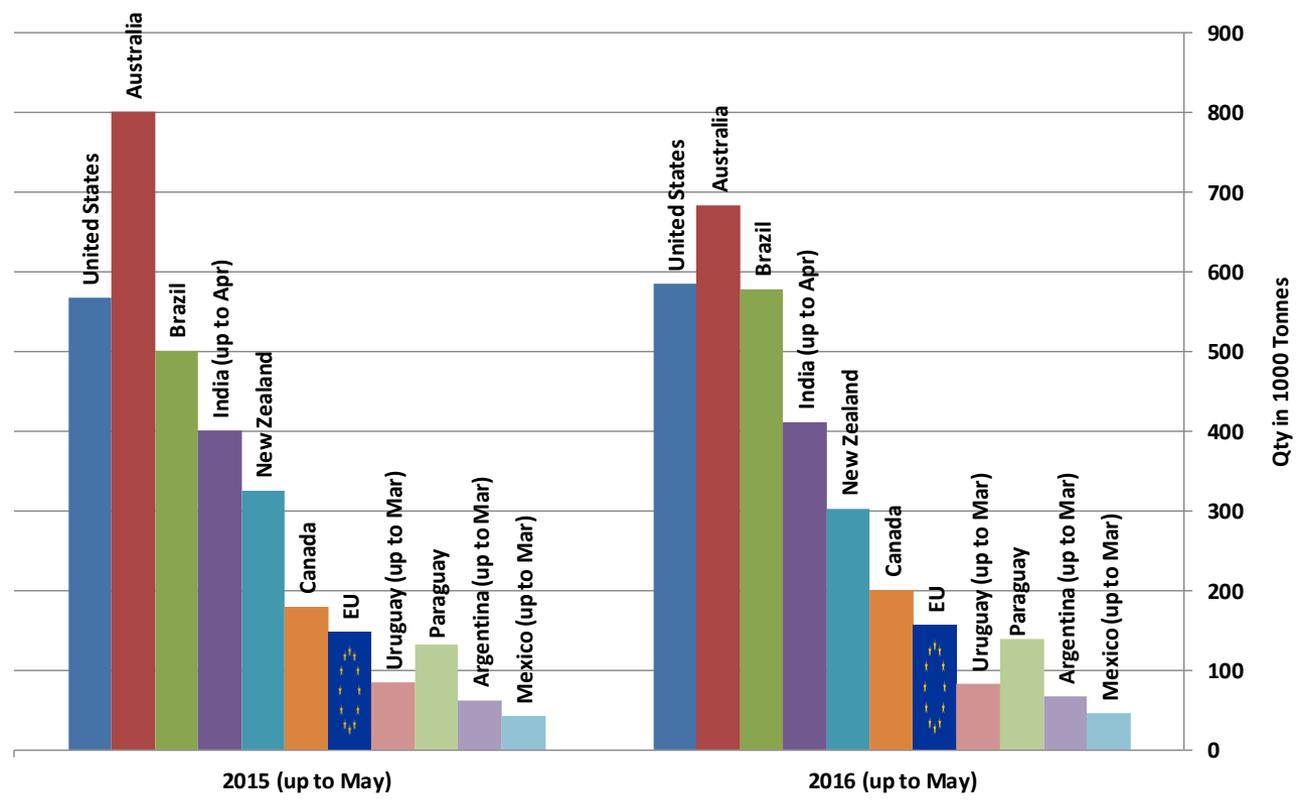
15 July 2016



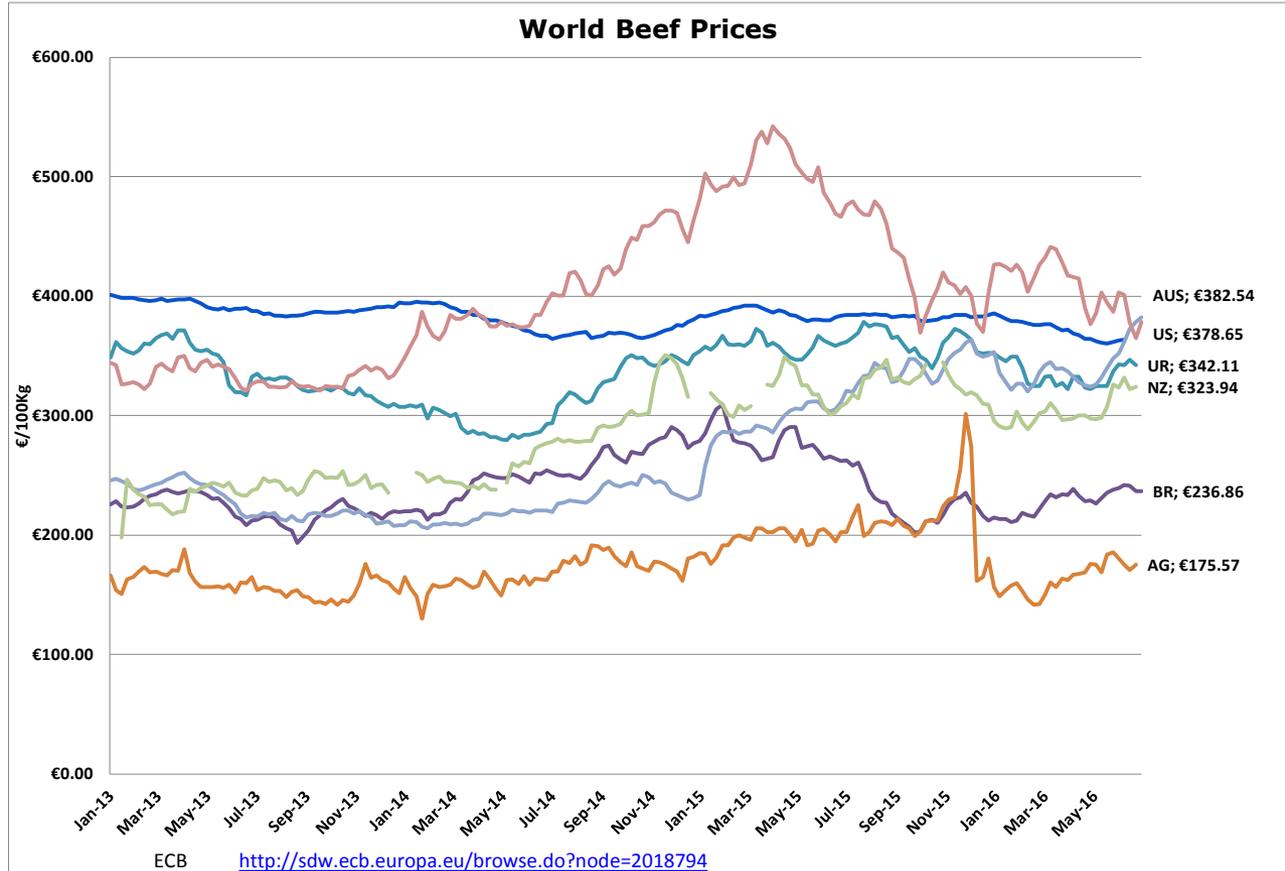
Source : GTA \* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)

## Main Exporters of BEEF Products (up to May)

Source : GTA \* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



15 July 2016



- ECB <http://sdw.ecb.europa.eu/browse.do?node=2018794>
- US <https://www.marketnews.usda.gov/mnp/lis-home>
- AUS <http://statistics.mla.com.au/Report/RunReport/ae59d4ac-74e4-4c56-93bd-982a044d9760>
- UY <http://www.inac.gub.uy/innovaportal/v/11034/10/innova.front/indicadores-y-precios>
- ARG [http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios\\_comparativos\\_del\\_novillo.html](http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html)
- BR <http://www.pecuaria.com.br/cotacoes.php>
- NZ [http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios\\_comparativos\\_del\\_novillo.html](http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html)

15 July 2016

# High Quality Beef Import Quotas



## Hilton Quota Regulation (EU) N° 593/2013

	Quantity allocated (Tons)	2012/2013		2013/2014		2014/2015		2015/2016*	
		Use		Use		Use		Use	
09.4001 Australia	2 250								
09.4004 Argentina	200	33.57	16.79%	15.71	7.86%	9.46	4.73%	11.58	5.79%
09.4450 Argentina	30 000	24 336.10	81.12%	23 663.86	78.88%	22 867.03	76.22%	22 350.61	74.50%
09.4451 Australia	7 150	6 441.07	90.08%	7 138.89	99.84%	6 815.93	95.33%	6 749.85	94.40%
09.4452 Uruguay	6 300	6 289.20	99.83%	6 278.75	99.66%	6 280.98	99.70%	6 249.09	99.19%
09.4453 Brazil	10 000	2 977.93	29.78%	4 078.92	40.79%	7 989.89	79.90%	9 289.17	92.89%
09.4454 New Zealand	1 300	1 281.13	98.55%	1 299.61	99.97%	1 299.45	99.96%	1 299.95	100.00%
09.4002 Canada/US	11 500	432.44	3.76%	431.80	3.75%	353.46	3.07%	292.16	2.54%
09.4455 Paraguay	1 000		0.00%		0.00%	12.13	1.21%	915.63	91.56%
<b>Total Beef</b>	<b>67 250</b>	<b>41 757.87</b>	<b>62.09%</b>	<b>42 891.83</b>	<b>63.78%</b>	<b>45 618.87</b>	<b>67.83%</b>	<b>47 146.46</b>	<b>70.11%</b>
<b>Total Buffalo</b>	<b>2 450</b>	<b>33.57</b>	<b>1.37%</b>	<b>15.71</b>	<b>0.64%</b>	<b>9.46</b>	<b>0.39%</b>	<b>11.58</b>	<b>0.47%</b>
<b>Total</b>	<b>69 700</b>	<b>41 791.44</b>	<b>59.96%</b>	<b>42 907.54</b>	<b>61.56%</b>	<b>45 628.33</b>	<b>65.46%</b>	<b>47 158.04</b>	<b>67.66%</b>

\* up to 30/06/2016

15 July 2016

# High Quality Beef Import Quotas



European  
Commission

## Quota erga omnes

## Regulation (EU) No 481/2012

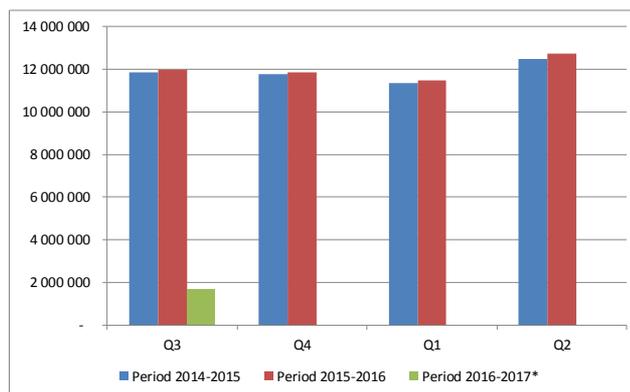
	2013-Q3	2013-Q4	2014-Q1	2014-Q2	TOTAL
Period 2013-2014	10 198 942	10 493 437	10 191 527	10 282 860	41 166 765
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	84.64%	87.08%	84.58%	85.33%	85.41%

	2014-Q3	2014-Q4	2015-Q1	2015-Q2	TOTAL
Period 2014-2015	11 842 700	11 745 231	11 352 426	12 457 389	47 397 746
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	98.28%	97.47%	94.21%	103.38%	98.34%
Available after transfer	12 050 000 98.28%	12 257 300 95.82%	12 562 069 90.37%	13 259 644 93.95%	

	2015-Q3	2015-Q4	2016-Q1	2016-Q2	TOTAL
Period 2015-2016	11 965 843	11 851 187	11 490 504	12 718 914	48 026 449
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	99.30%	98.35%	95.36%	105.55%	99.64%
Available after transfer	12 050 000 99.30%	12 134 157 97.67%	12 332 969 93.17%	12 892 465 98.65%	

	2016-Q3	2016-Q4	2017-Q1	2017-Q2	TOTAL
Period 2016-2017*	1 683 975	-	-	-	1 683 975
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	13.97%	0.00%	0.00%	0.00%	3.49%
Available after transfer	12 050 000 13.97%	22 416 025 0.00%	34 466 025 0.00%	46 516 025 0.00%	

\* Until 13/07/2016



15 July 2016

# Forecast Summary



European  
Commission

	2014	2015	2016	2017
<b>EU.15 PRODUCTION</b> ( 1000T )	- 0.19% 6 636	+ 2.68% 6 813	+ 3.35% 7 042	+ 1.03% 7 114
<b>EU.15 CONSUMPTION</b> ( 1000T )	+ 0.78% 6 916	+ 1.75% 7 037	+ 0.11% 7 044	+ 0.23% 7 060
<b>BALANCE</b>	- 280	- 223	- 2	53
<b>EU.13 PRODUCTION</b> ( 1000T )	+ 12.11% 691	+ 12.43% 777	+ 6.07% 824	+ 3.07% 849
<b>EU.13 CONSUMPTION</b> ( 1000T )	- 0.38% 390	+ 1.15% 394	- 3.02% 382	+ 0.39% 384
<b>BALANCE</b>	301	383	442	466
<b>EU.28 PRODUCTION</b> ( 1000T )	+ 0.86% 7 327	+ 3.60% 7 590	+ 3.63% 7 866	+ 1.24% 7 963
<b>EU.28 CONSUMPTION</b> ( 1000T )	+ 0.72% 7 305	+ 1.72% 7 431	- 0.06% 7 426	+ 0.24% 7 444
<b>BALANCE</b>	21	160	440	519
<b>EU - CARCASS PRICES</b>	2014	2015	2016	2017
<b>ADULT MALE BOVINES</b> ( €/100 kg )	- 5.8% 373.6	+ 3.44% 386.4	- 4.16% 370.4	+ 0.31% 371.5
<b>COWS</b> ( €/100 kg )	- 8.4% 287.1	- 0.70% 285.1	- 4.50% 272.3	- 0.69% 270.4

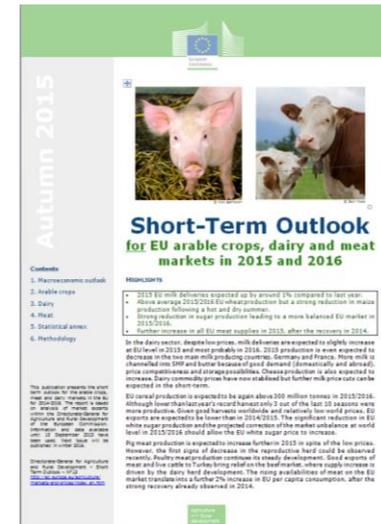
15 July 2016

Sources : EStat New Cronos, Member States

Agriculture  
and Rural  
Development

# DG AGRI Short term outlook

- What is the STO ?
  - Short term projections for main agri commodities (including beef and pork)
  - Based on reflections of DG AGRI market experts
  - EU balances on production / consumption / trade
  - Background on specific topics and developments
  - 2 years horizon (2016, 2017)
  - Published 3 times / year



# DG AGRI Short term outlook

## • Sources of information

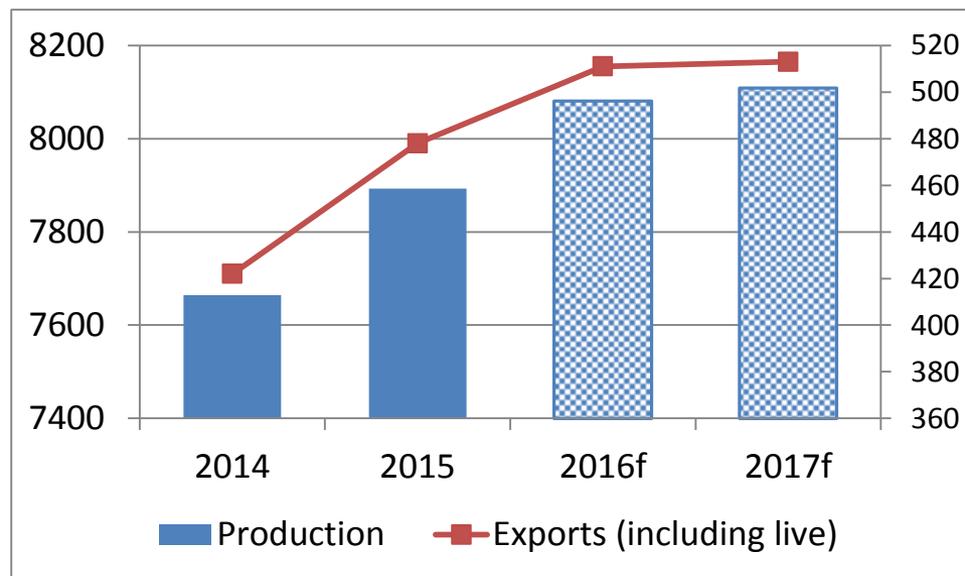
- Forecast groups, EU Member State experts
- Stakeholders
- Latest statistical data (Eurostat, ...)
- Specialised market literature

## • Latest version:

[http://ec.europa.eu/agriculture/markets-and-prices/short-term-outlook/index\\_en.htm](http://ec.europa.eu/agriculture/markets-and-prices/short-term-outlook/index_en.htm)



# Selected results STO: EU production and exports



## BEEF

# Annex II



***Meat Market Observatory  
Pigmeat Market Situation  
15 July 2016***



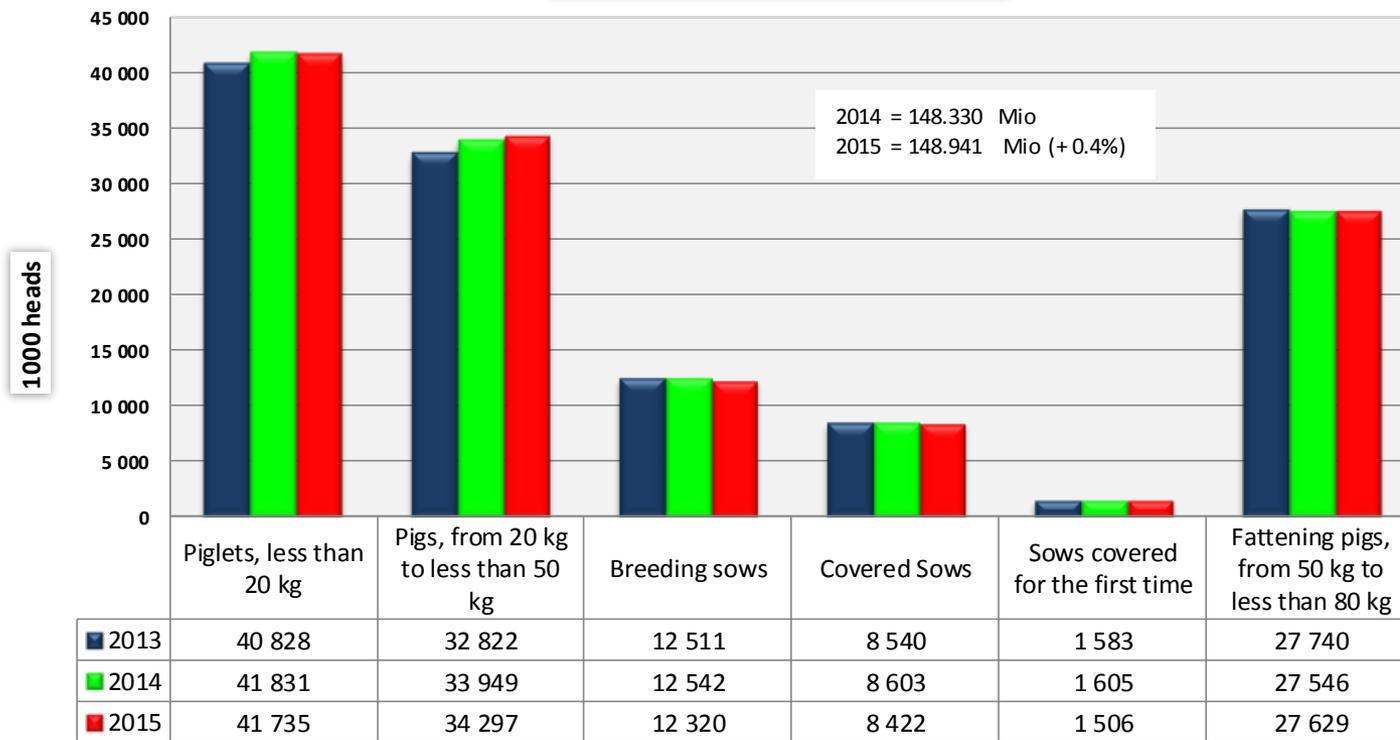
European  
Commission



# Production



## Pig population Livestock survey December 2015



Source: Eurostat

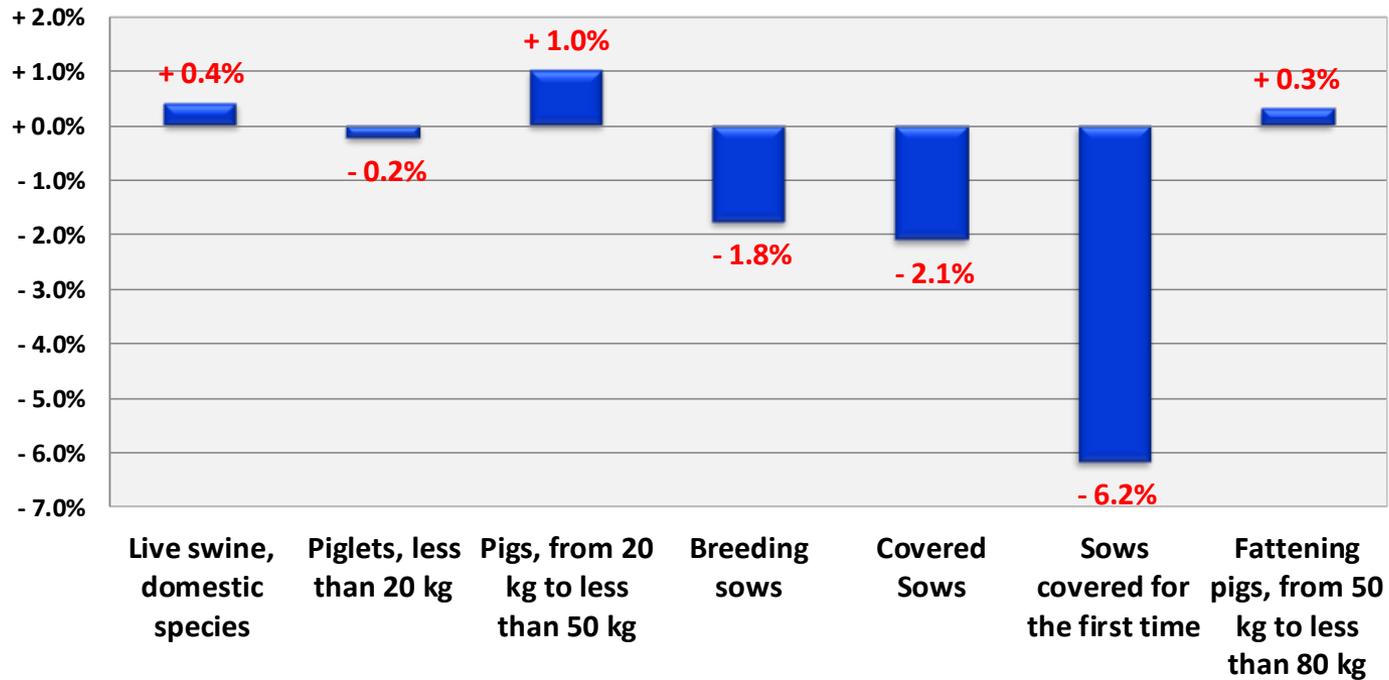
■ 2013 ■ 2014 ■ 2015



European  
Commission

## Change in pig population

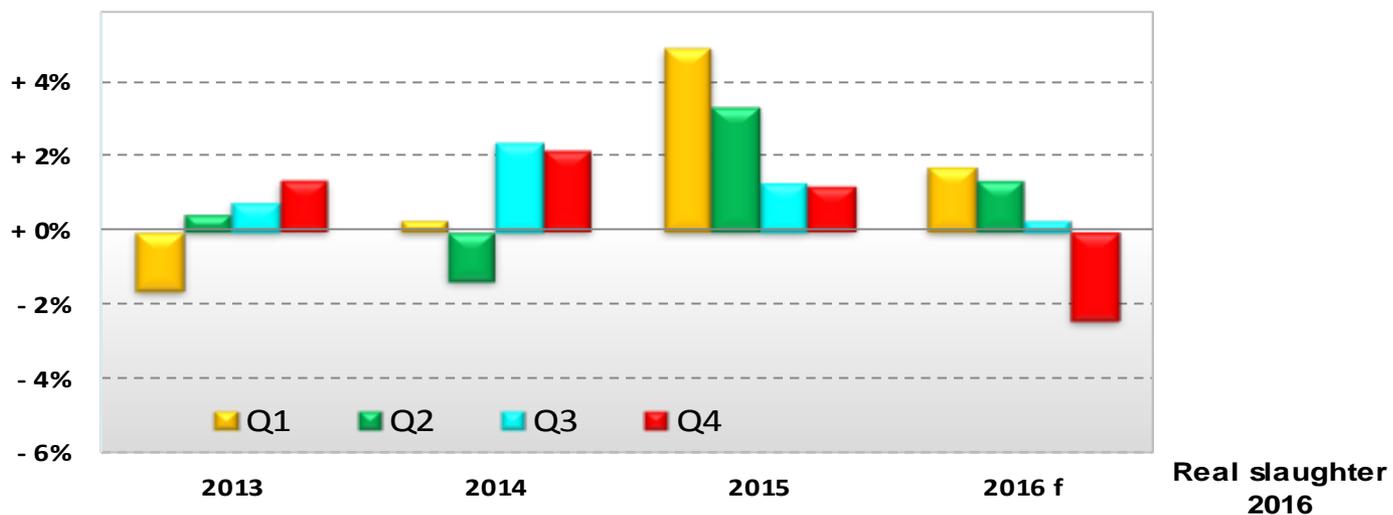
Livestock survey December 2015 compared to December 2014



Source: Eurostat



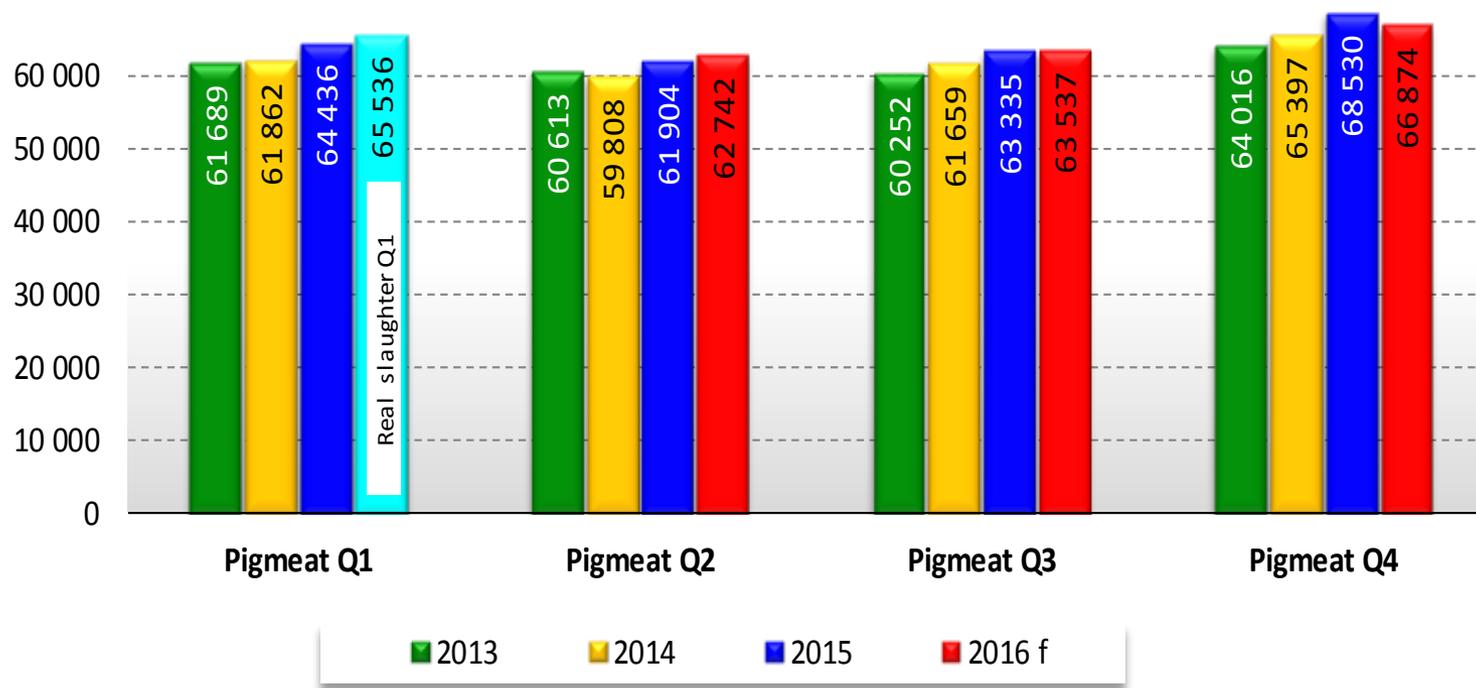
**Change in EU pigmeat slaughter (2016 forecast based on GIP and experts estimations)**



	2013	2014	2015	2016 f	Real slaughter 2016
<b>Q1</b>	- 1.6%	+ 0.3%	+ 4.9%	<b>+ 1.7%</b>	<b>+ 0.3%</b>
<b>Q2</b>	+ 0.4%	- 1.3%	+ 3.3%	<b>+ 1.4%</b>	
<b>Q3</b>	+ 0.8%	+ 2.3%	+ 1.3%	<b>+ 0.3%</b>	
<b>Q4</b>	+ 1.3%	+ 2.2%	+ 1.2%	<b>- 2.4%</b>	
<b>EU_28</b>	<b>+ 0.2%</b>	<b>+ 0.9%</b>	<b>+ 2.6%</b>	<b>+ 0.2%</b>	

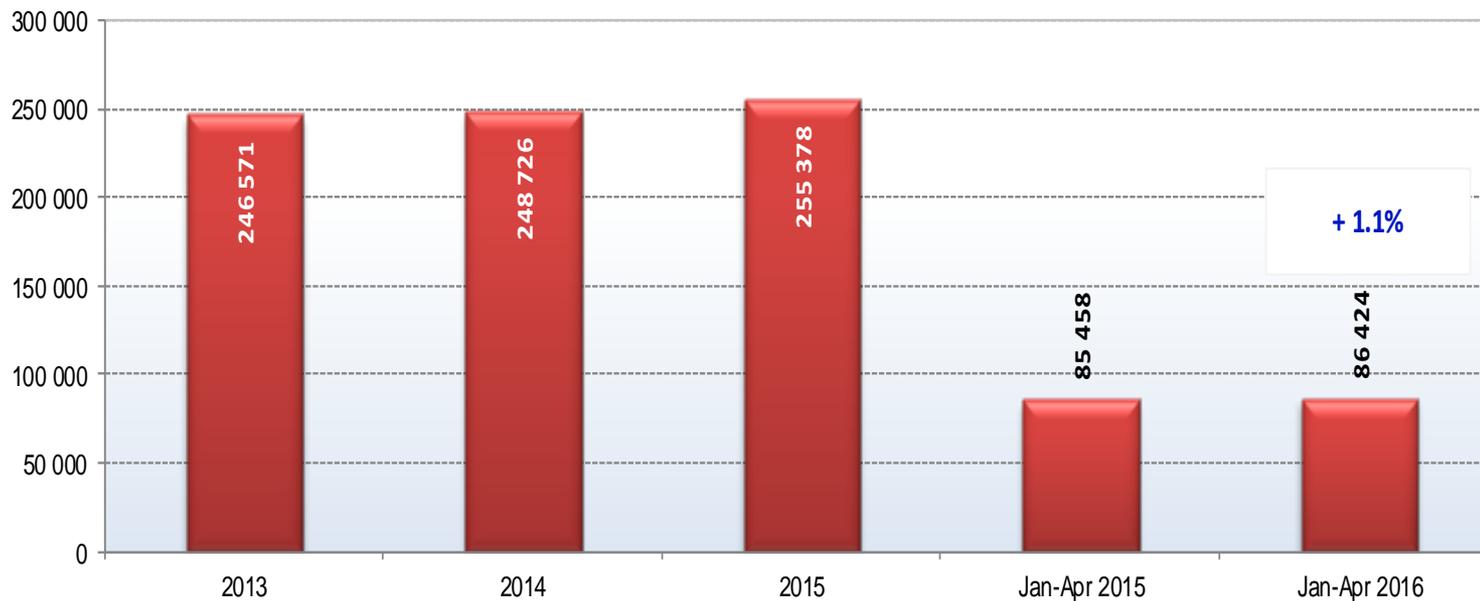


**EU pigmeat slaughter (2016 forecast based on GIP and experts estimations)  
( '000 heads)**





## EU pig slaughter by year (<sup>'</sup>000 heads)

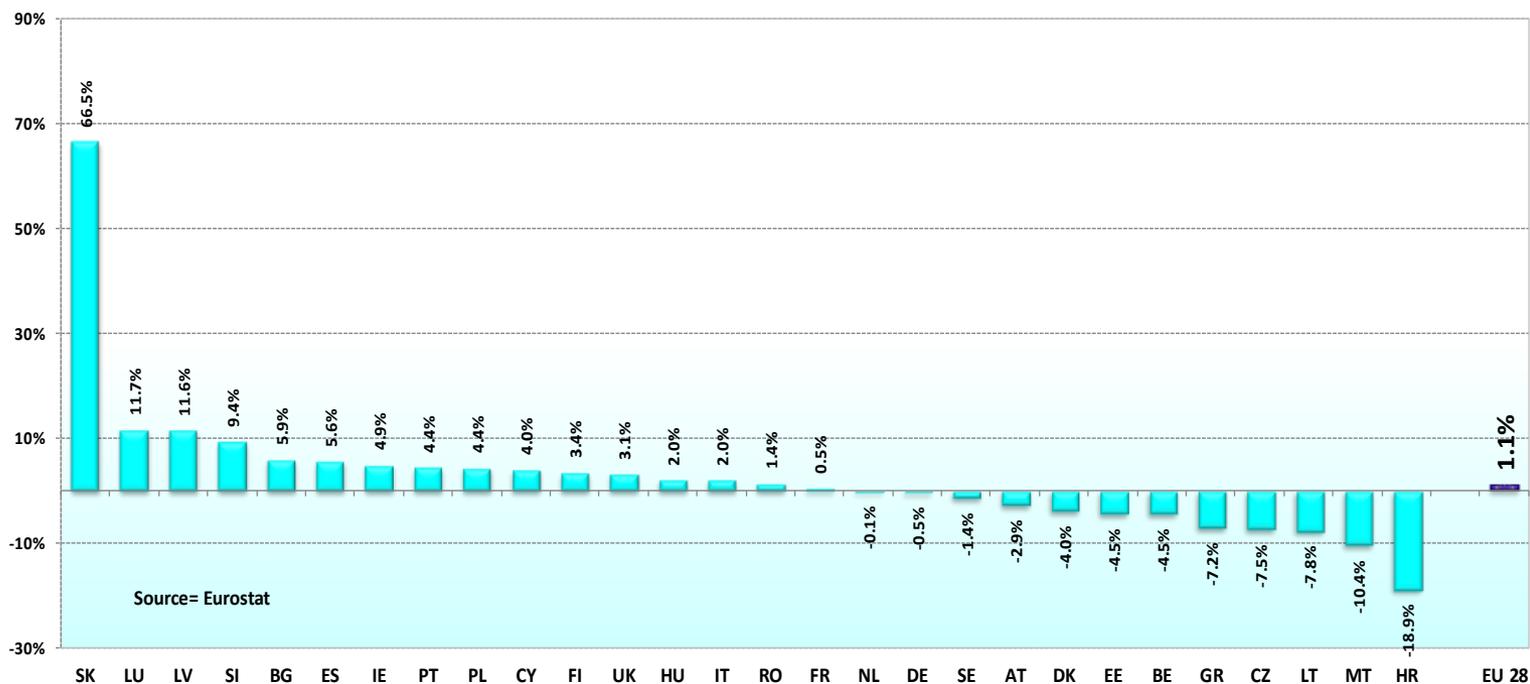


Source: Eurostat



European  
Commission

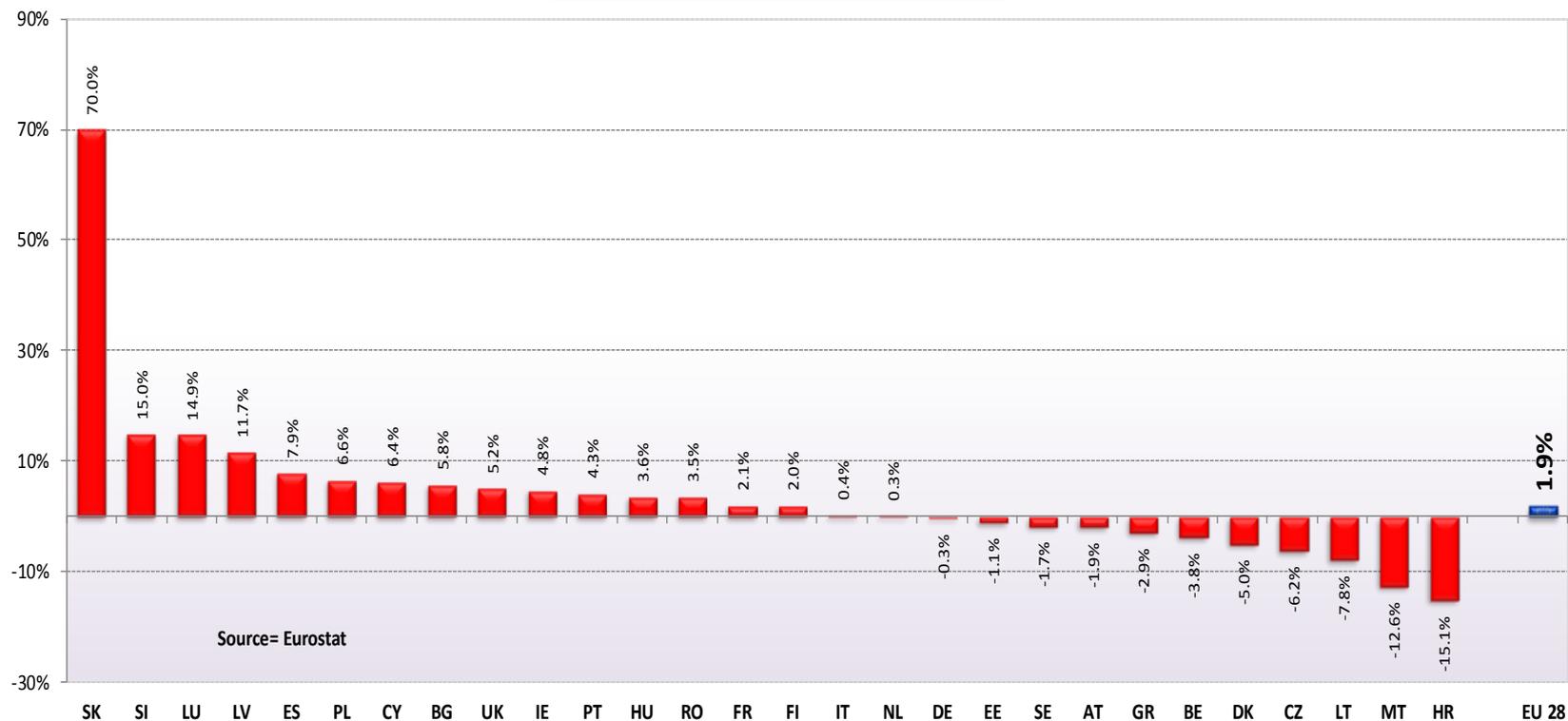
**Change in Pig Slaughter ('000 heads)  
2016/2015 (up to Apr)**





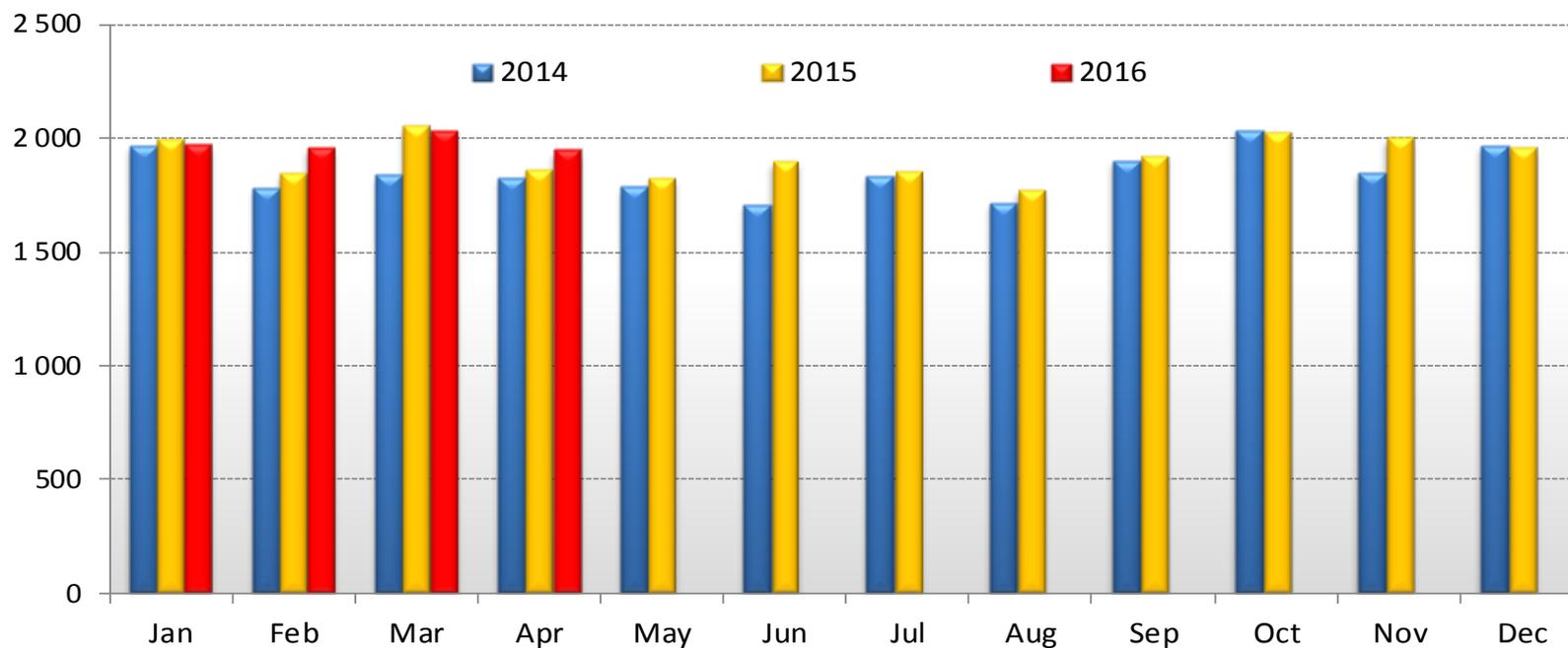
European  
Commission

**Change in Pig Slaughter ('000 tonnes)  
2016/2015 (up to Apr)**





## Pig Production (E28 Slaughtering) - Tonnes



Source - Estat-Newcronos



European  
Commission



# Prices



EU Prices	EU Prices	27	Evolution since last week	Evolution since last month	Evolution since last year
	Average (S-E)	161.97	+ 1.5%	+ 7.9%	+ 9.9%
	Class S	163.06	+ 1.4%	+ 7.9%	+ 8.8%
	Class E	160.36	+ 1.6%	+ 7.9%	+ 11.7%
	Piglet	44.33	+ 1.5%	+ 5.8%	+ 17.5%

€/100 kg cw

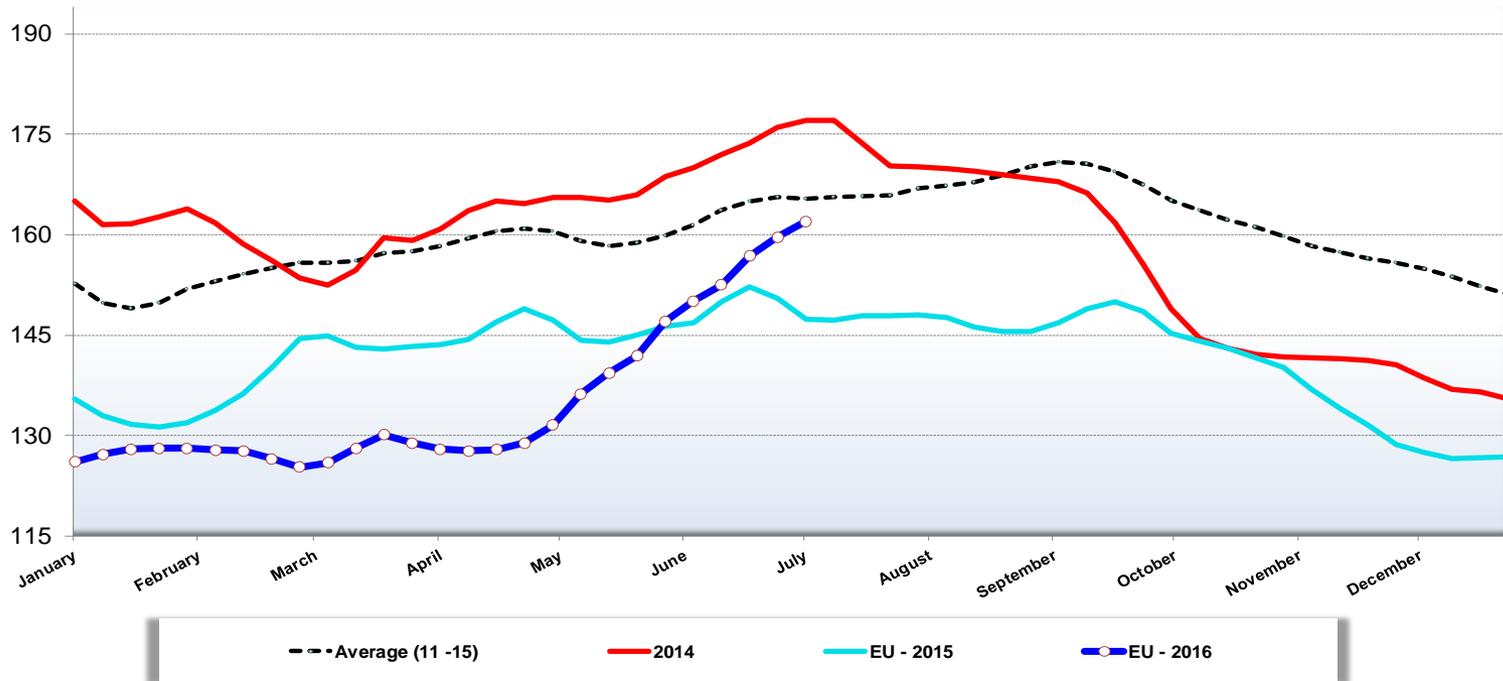
€/head



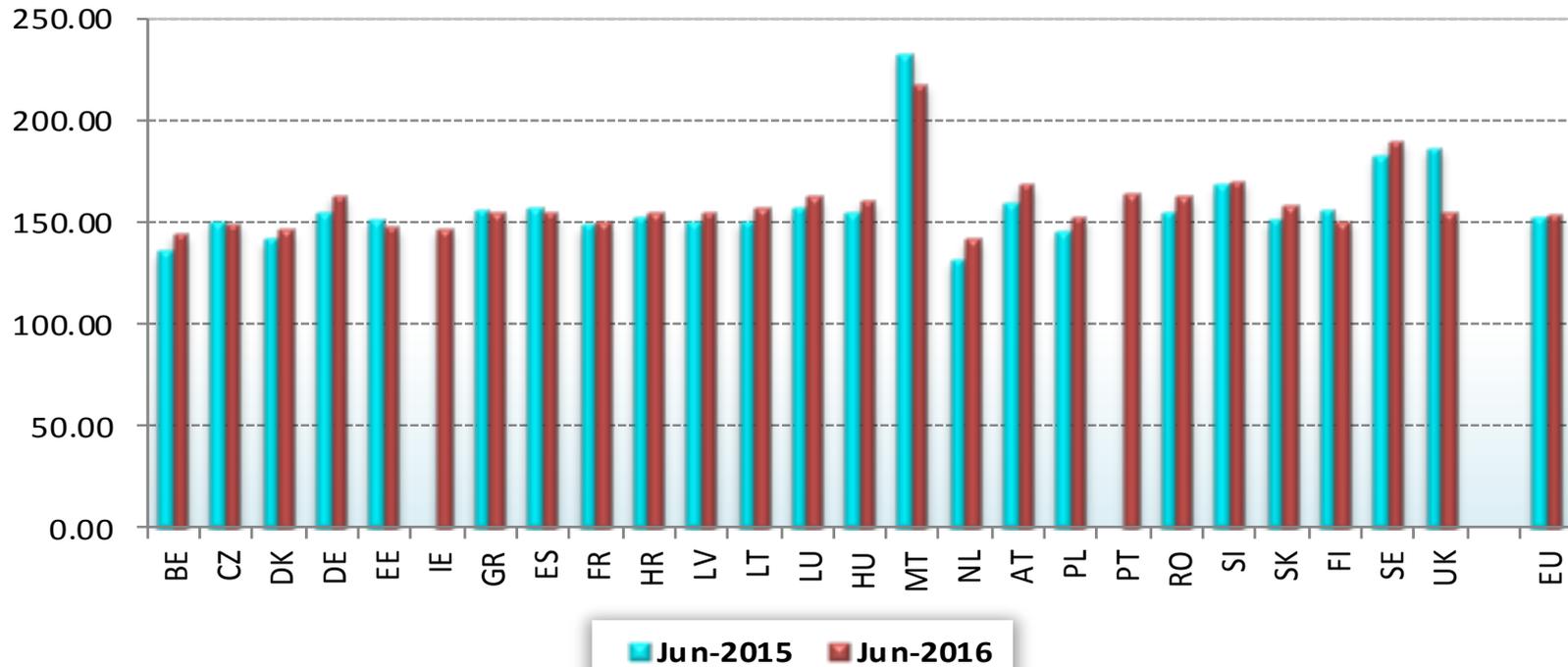
European  
Commission

## EU evolution of the EU pig carcass prices (€/ 100kg)

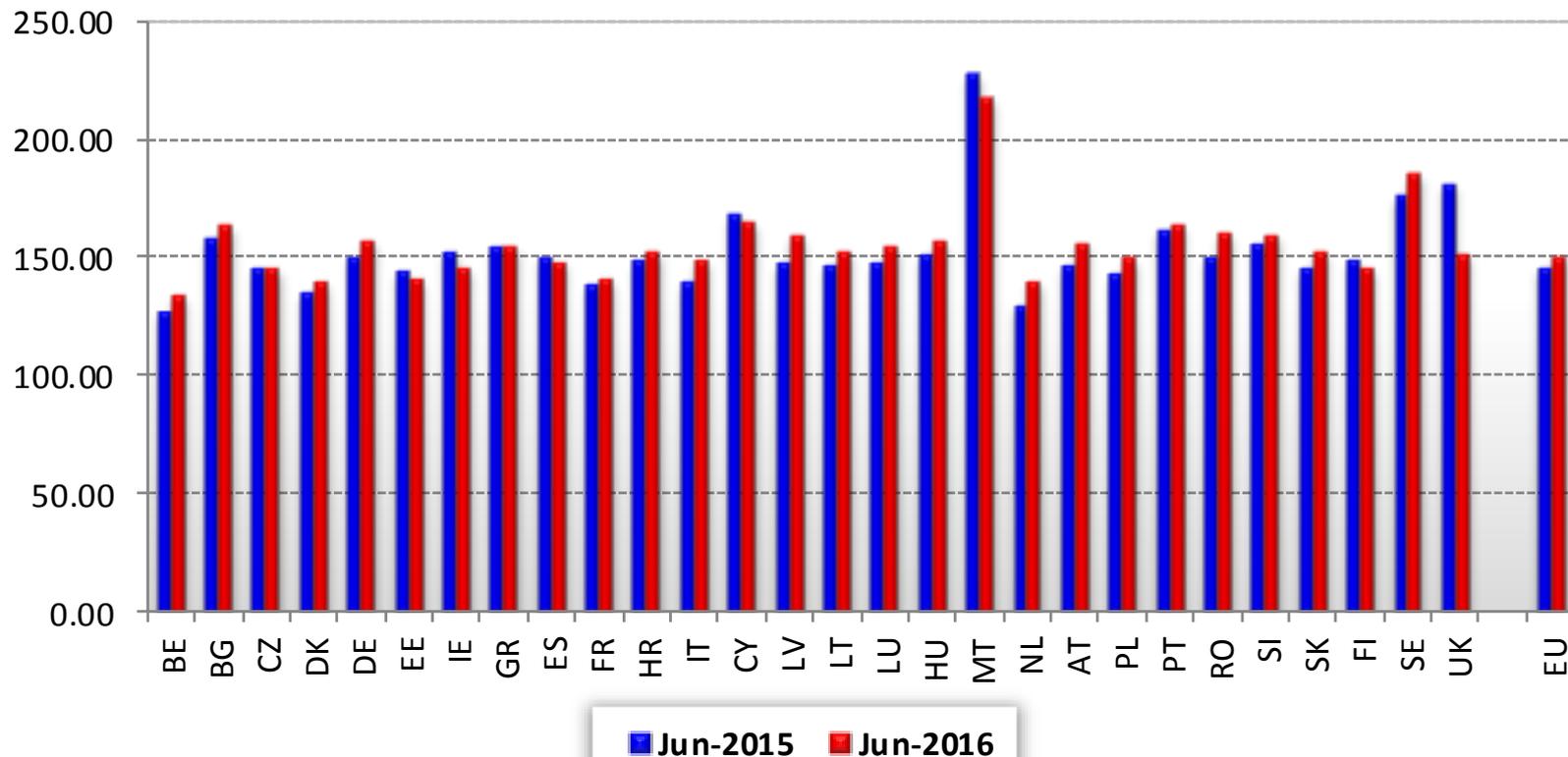
Latest price (Week 27) : 161.97 EUR/100 kg



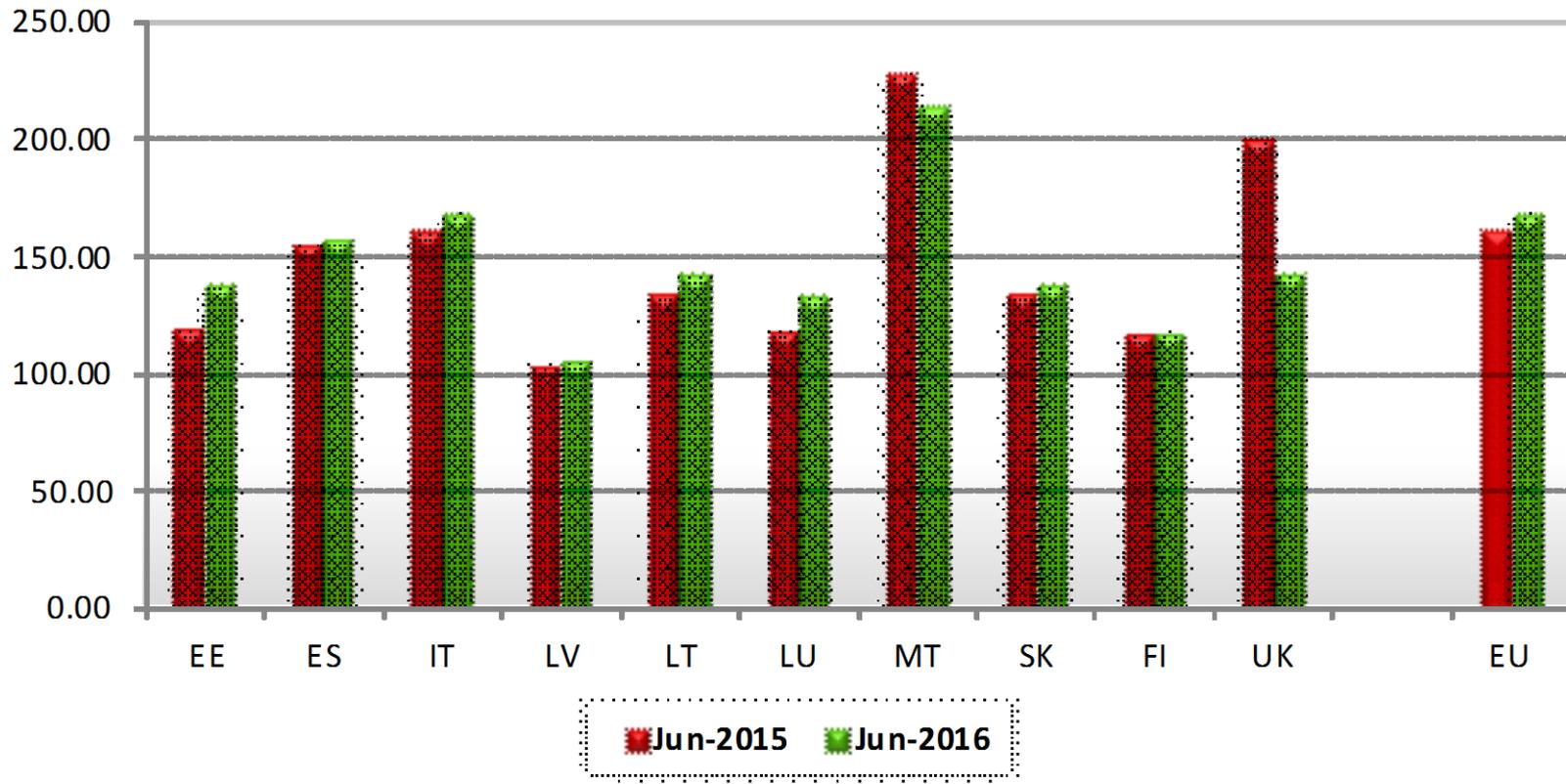
## Class S (monthly prices) (€/100 kg)



## Class E (monthly prices) (€/100 kg)



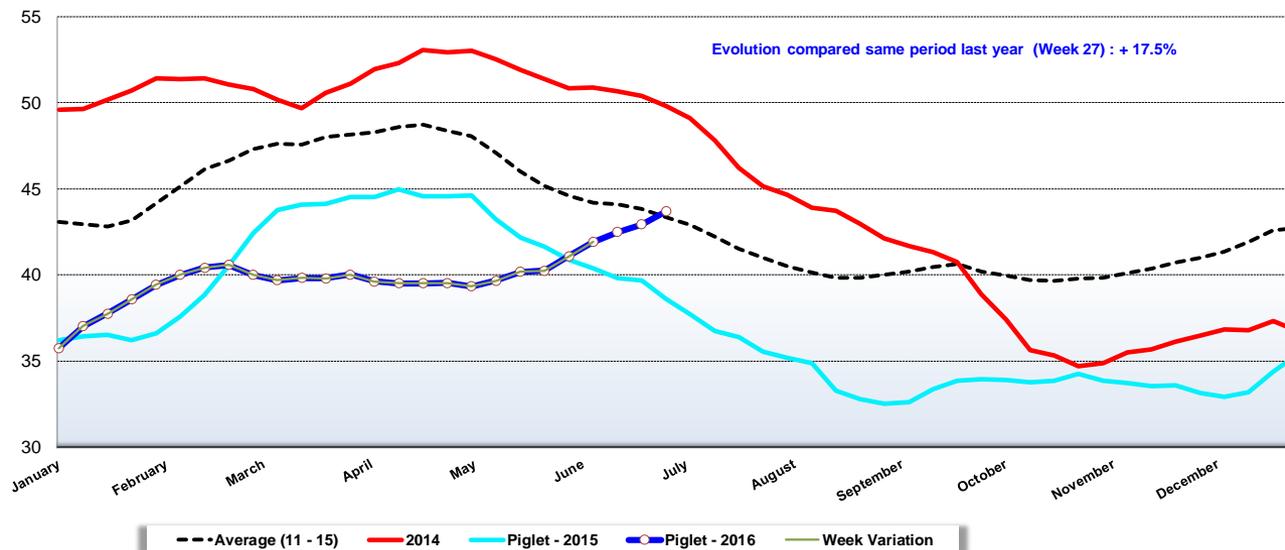
## Class R (monthly prices) (€/100 kg)





## EU evolution of the EU average piglet prices (€/head)

Latest price (Week 27) : 44.33 EUR/Head





**Weekly average Pigprices 2014 - 2016 in Euro/ 100kg carcase  
EU, Brazil, Canada and the US**



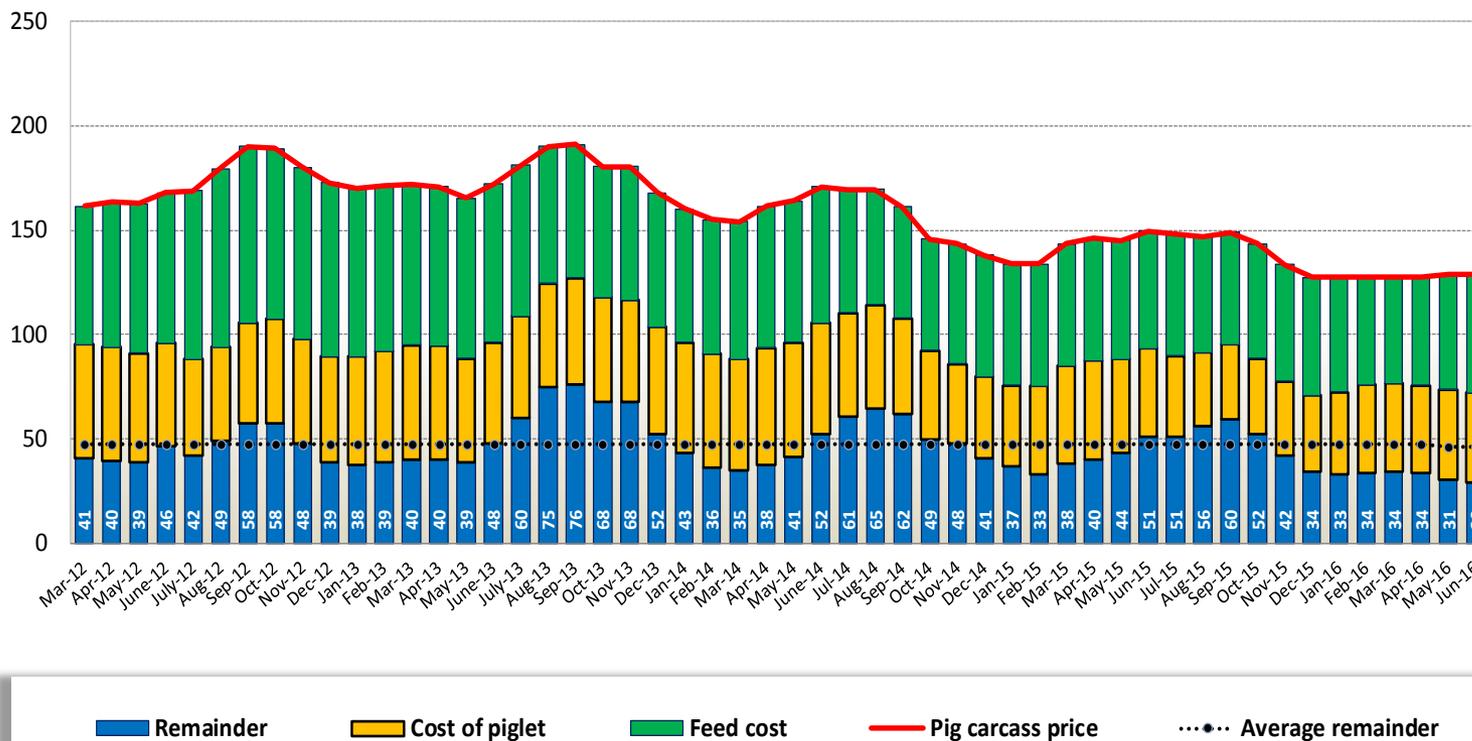
EU = weighted avg of MS prices grade E <55% lean meat. As from 1.1.2014 42% class E and 58%S.  
 US = weekly USDA prices carcase lean hogs Iowa-Minn. 167-187lb (feedstuffs.com)  
 BR = average of maximum prices in main producing states (suino.com.br)  
 CDN= Ontario Dressed weight FOBAs from dec 2010, before Index 100 (agr.gc.ca)

--- EU      — US  
 — BR      — CAN



European  
Commission

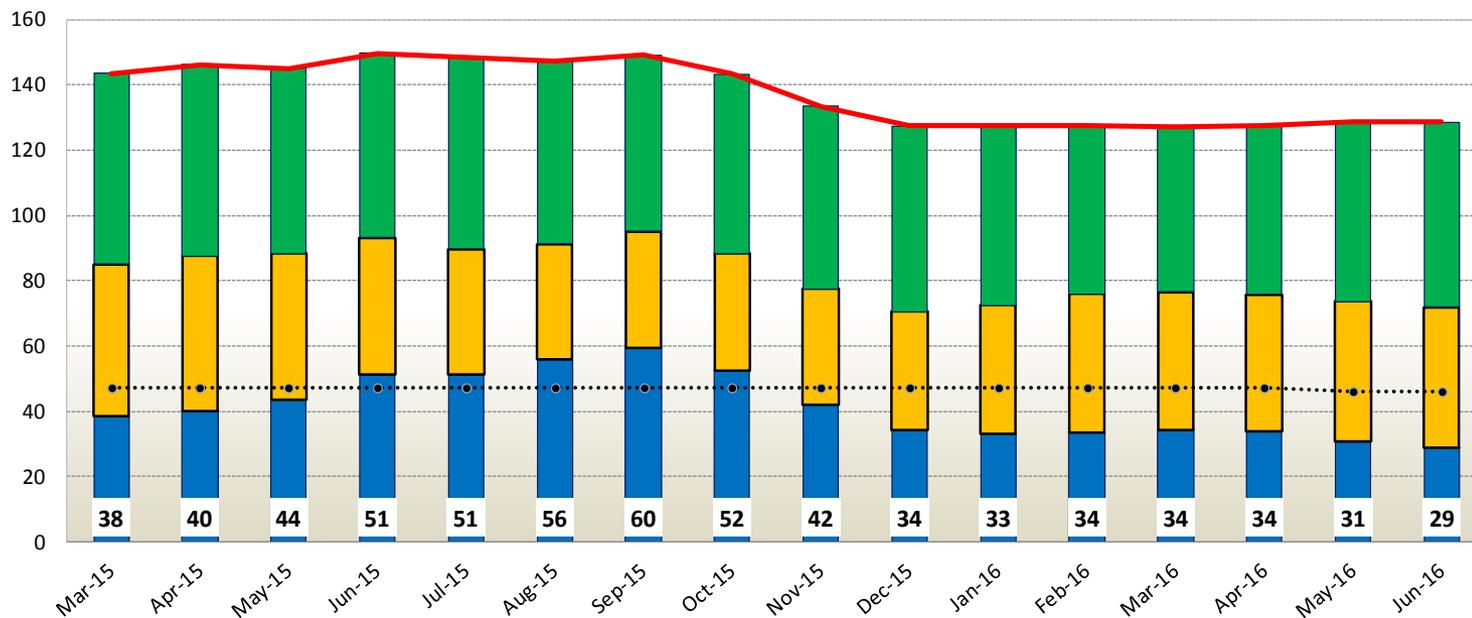
**Remainder for pig fattening**





European  
Commission

Remainder for pig fattening



Remainder

Cost of piglet

Feed cost

Pig carcass price

Average remainder



European  
Commission

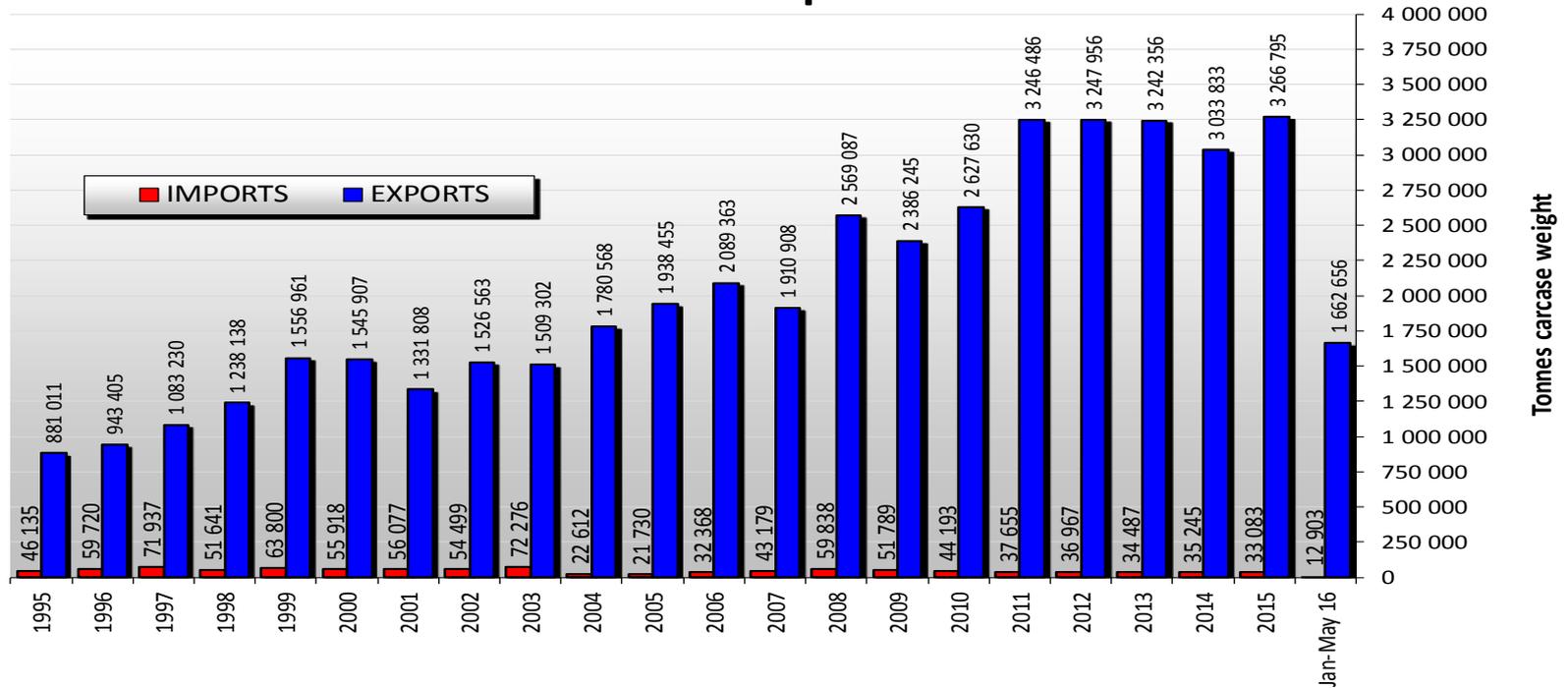


# Trade



## EU trade of PIG products

### EU Trade of PIG products





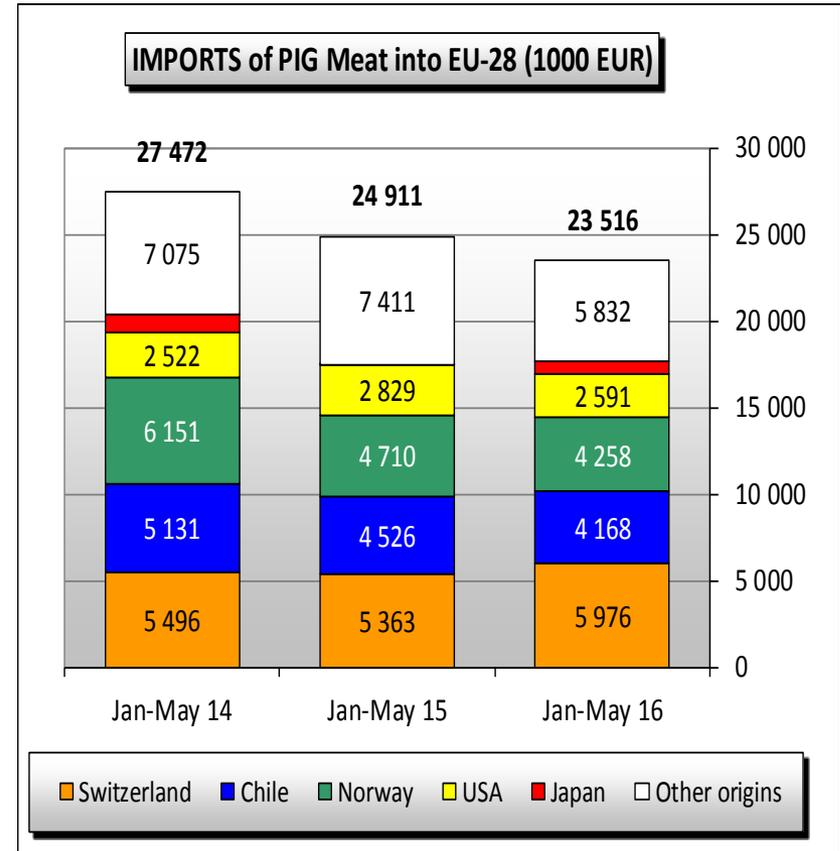
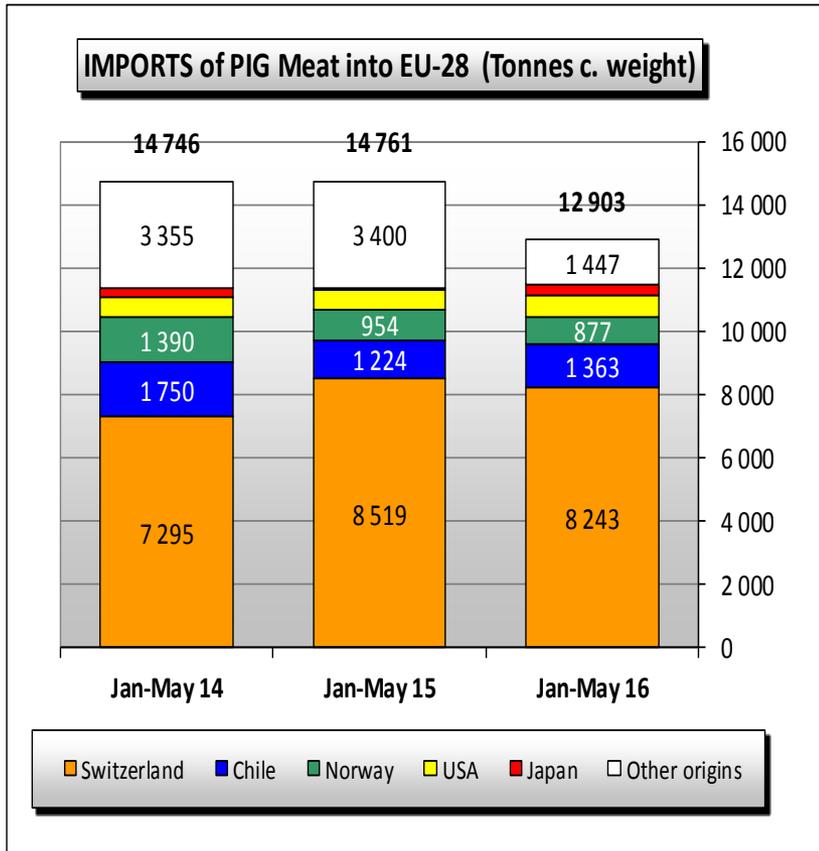
## EU imports of selected PIG products Trade figures (COMEXT – tonnes carcass weight)

### IMPORT

	2012		2013		2014		2015		Jan-May 16		Compared to Jan-May 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Switzerland	18 731	51%	17 399	50%	18 207	52%	20 225	61%	8 243	64%	-3%
Chile	8 756	24%	6 432	19%	3 416	10%	2 896	9%	1 363	11%	11%
Norway	2 045	6%	2 202	6%	3 192	9%	2 314	7%	877	7%	-8%
USA	1 264	3%	1 548	4%	1 498	4%	1 769	5%	662	5%	4%
Other	6 171	17%	6 906	20%	8 932	25%	5 879	18%	1 758	14%	
Extra-EU	36 967		34 487		35 245		33 083		12 903		
% change			- 7%		+ 2%		- 6%		- 12.6%		

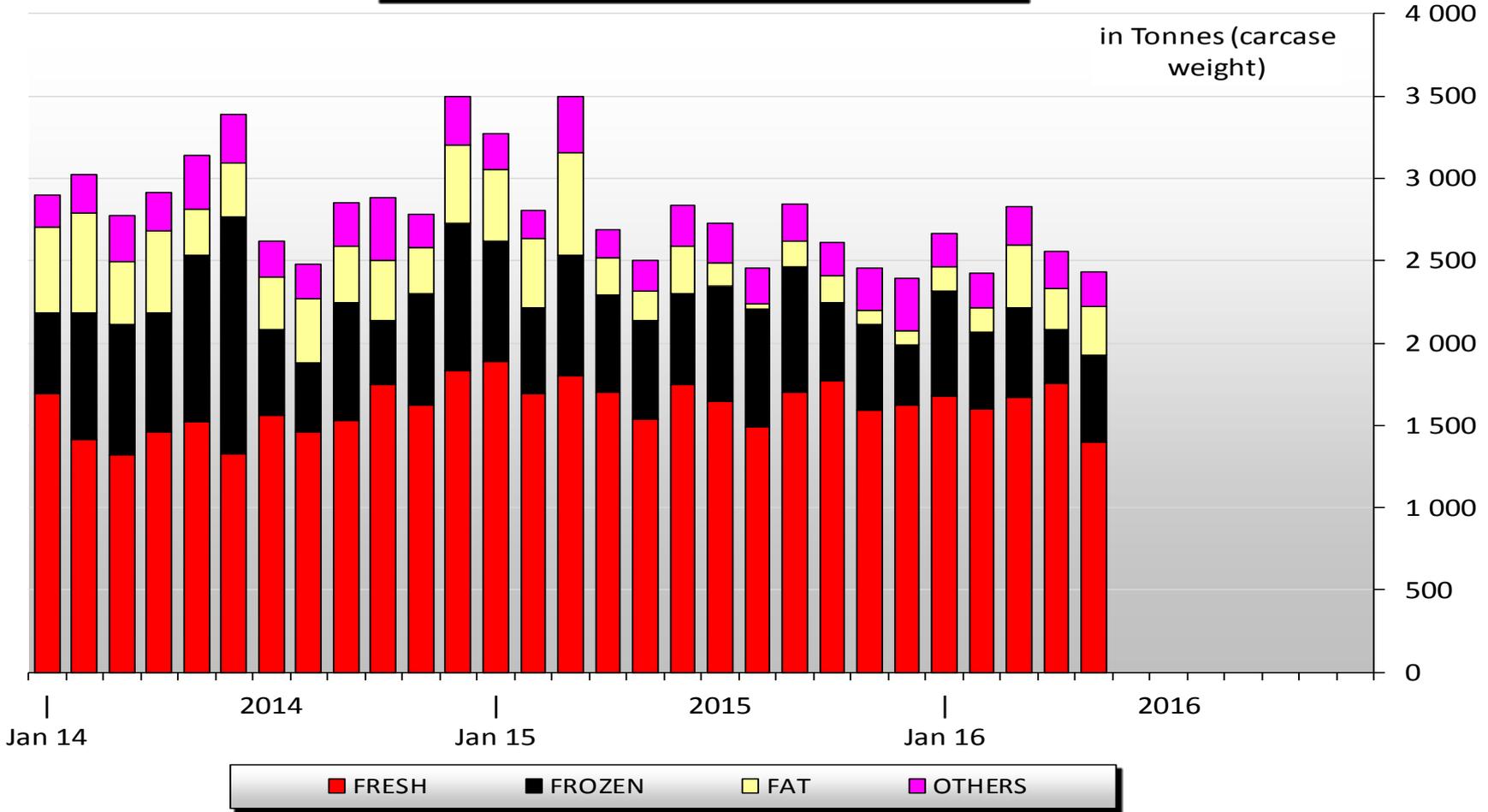


## EU imports of selected PIG products Trade figures (COMEXT – tonnes carcass weight)





## Imports of selected PIG products

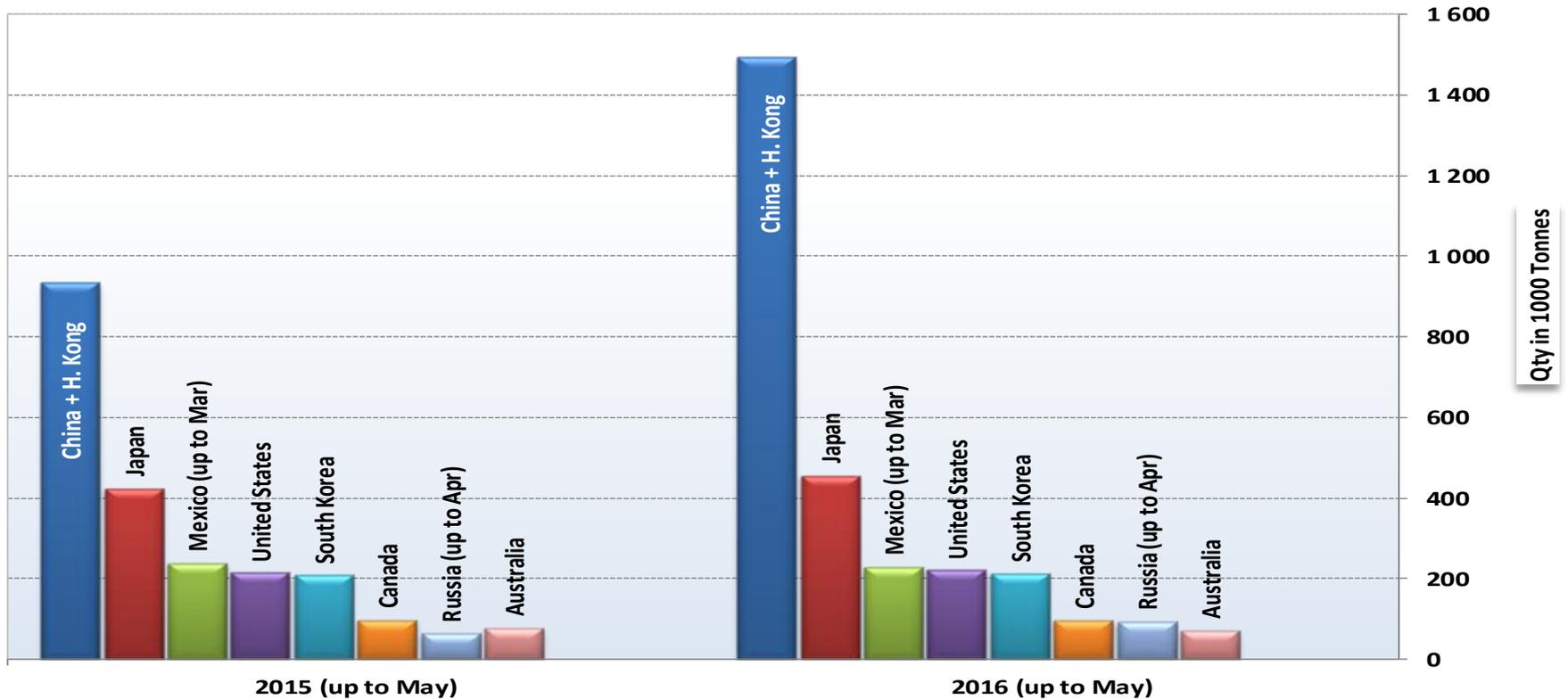




## Main Importers of PIG Products (up to May)

Source : GTA & Eurostat

(excl. live animals)



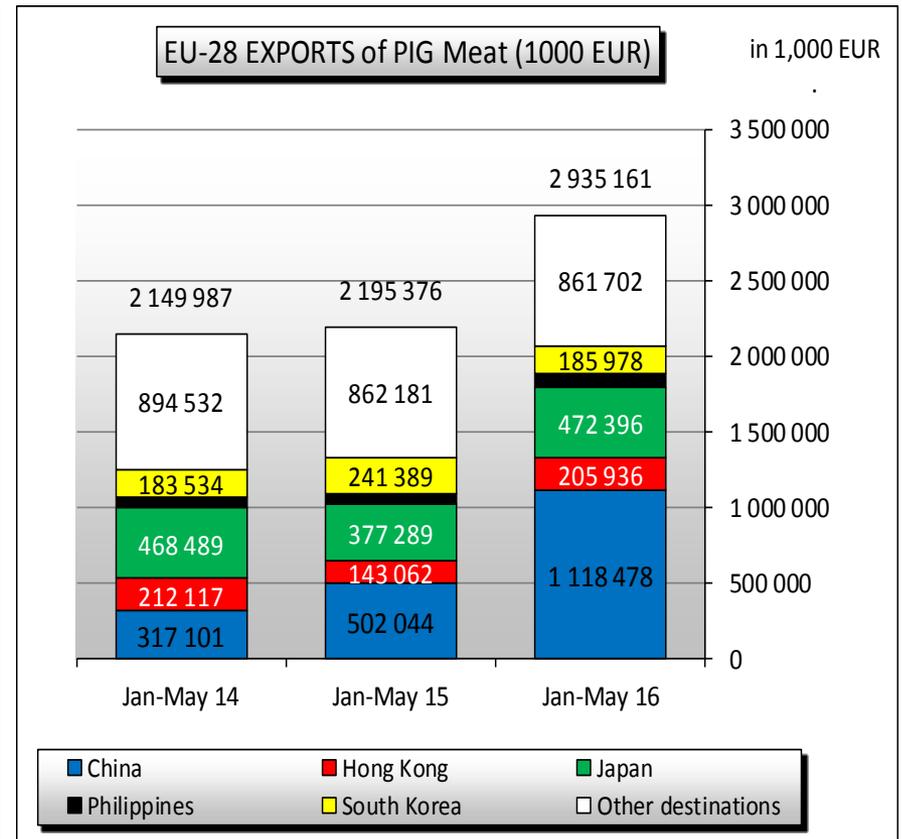
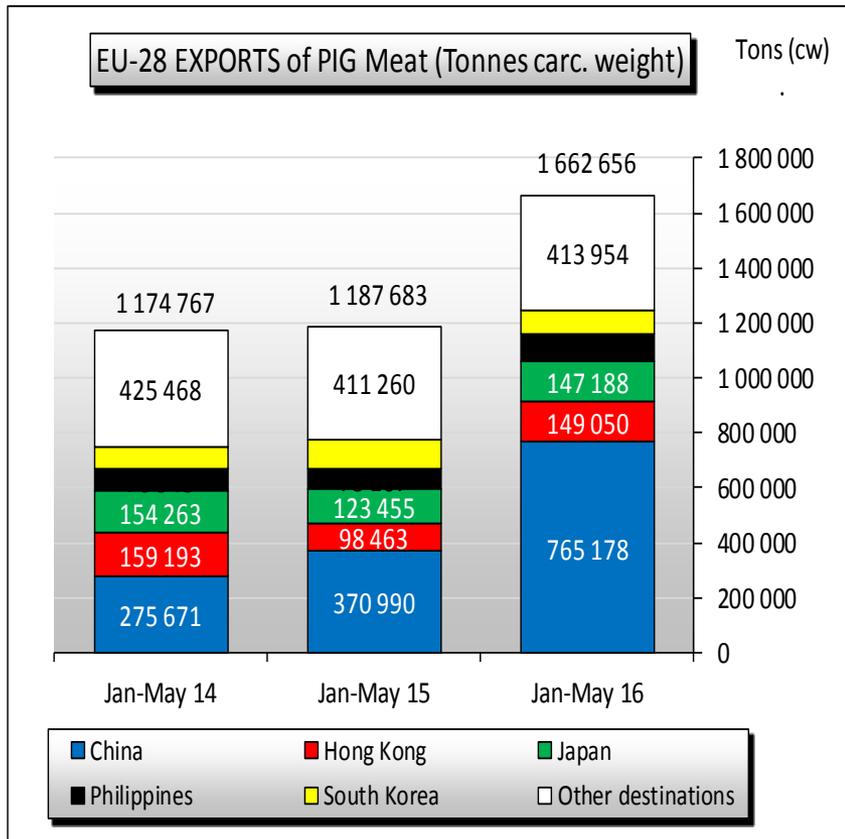


## EU exports of selected PIG products: Trade figures (COMEXT – tonnes carcass weight)

	2012		2013		2014		2015		Jan-May 16		Compared to Jan-May 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
China	589 805	18.2%	668 386	20.6%	717 033	23.6%	1 110 562	34.0%	765 178	46.0%	+ 106%
Hong Kong	381 703	11.8%	388 015	12.0%	408 183	13.5%	291 140	8.9%	149 050	9.0%	+ 51%
Japan	259 997	8.0%	261 324	8.1%	347 721	11.5%	330 133	10.1%	147 188	8.9%	+ 19%
Philippines	74 140	2.3%	102 348	3.2%	202 522	6.7%	189 361	5.8%	97 200	5.8%	+ 33%
South Korea	145 950	4.5%	108 482	3.3%	227 825	7.5%	232 377	7.1%	90 085	5.4%	- 18%
USA	65 116	2.0%	64 710	2.0%	90 985	3.0%	101 991	3.1%	50 731	3.1%	+ 28%
Australia	54 262	1.7%	51 467	1.6%	73 156	2.4%	85 172	2.6%	37 643	2.3%	+ 10%
Ukraine	167 129	5.1%	125 540	3.9%	106 780	3.5%	96 815	3.0%	32 235	1.9%	+ 13%
Vietnam	1 369	0.0%	3 269	0.1%	16 056	0.5%	38 227	1.2%	25 558	1.5%	+ 184%
Taiwan	15 681	0.5%	11 540	0.4%	52 970	1.7%	53 687	1.6%	21 174	1.3%	+ 3%
Ivory Coast	26 559	0.8%	35 107	1.1%	39 773	1.3%	49 874	1.5%	15 173	0.9%	- 18%
Thailand	18 599	0.6%	23 211	0.7%	34 382	1.1%	33 801	1.0%	14 734	0.9%	- 5%
Other	1 447 643	44.6%	1 398 957	14.5%	716 447	13.7%	653 655	14.4%	216 707	13.0%	
Extra-EU	3 247 956		3 242 356		3 033 833		3 266 795		1 662 656		
% change			- 0%		- 6%		+ 8%		+ 40.0%		



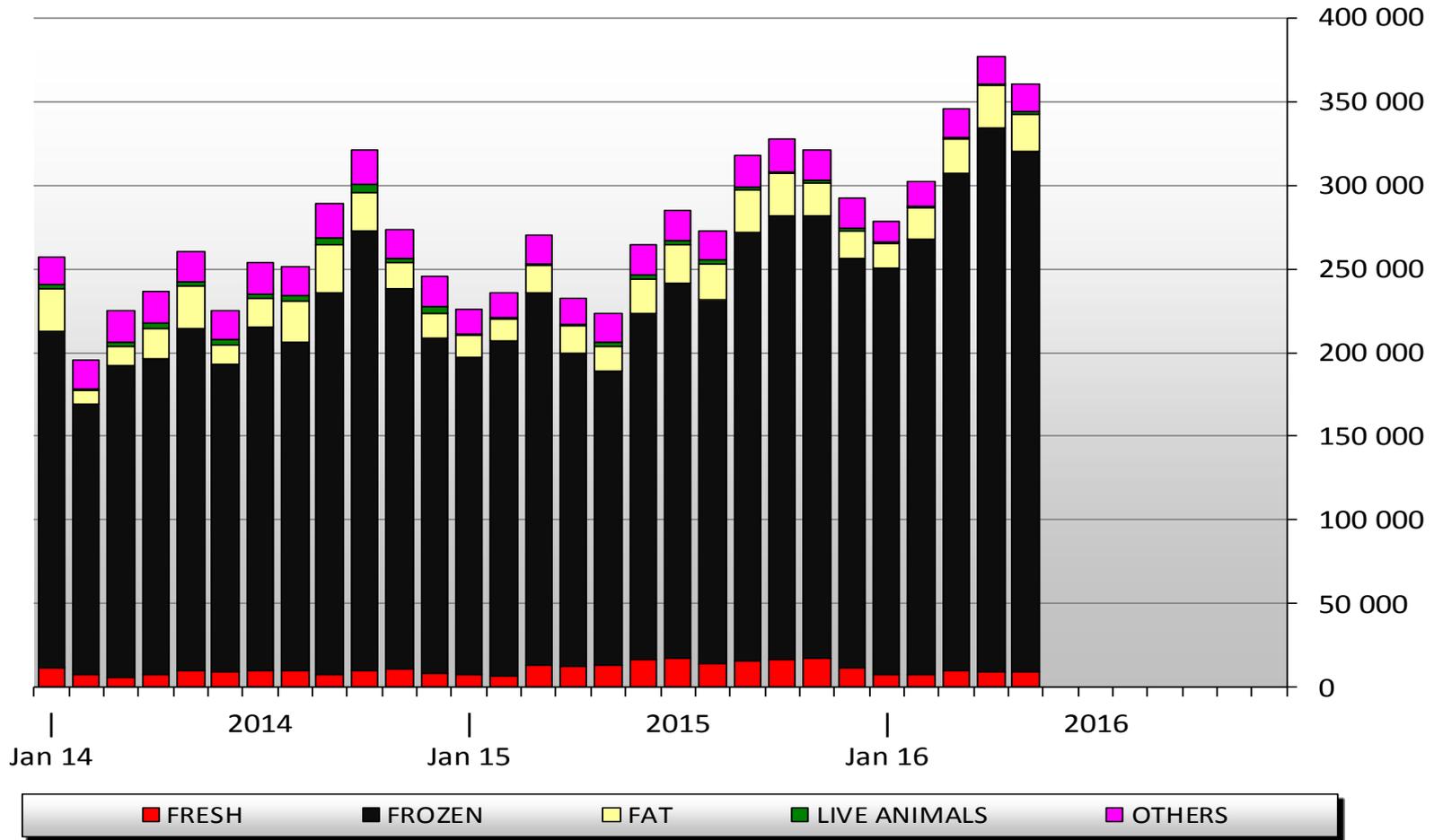
## EU exports of selected PIG products Trade figures (COMEXT – tonnes carcass weight)





## EU Exports of selected PIG products

in Tonnes  
(carcase weight)

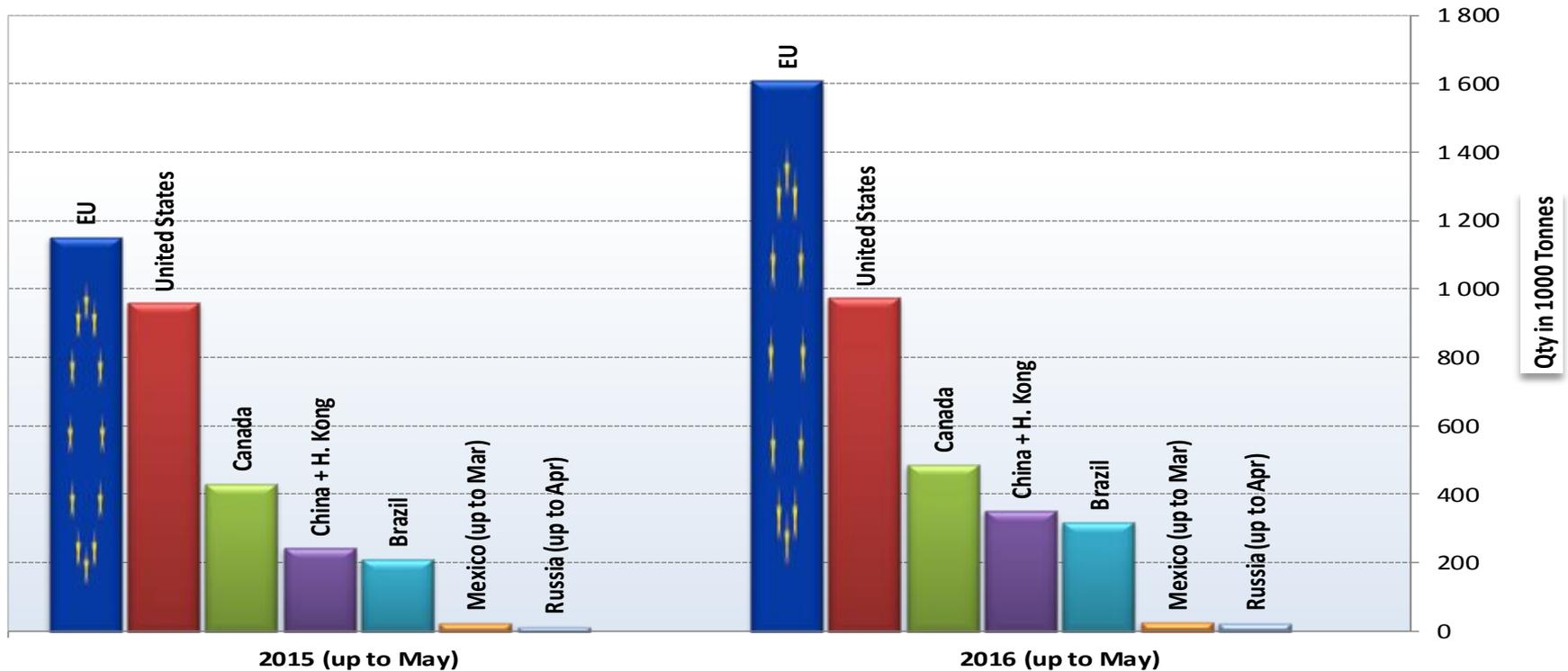




## Main Exporters of PIG Products (up to May)

Source : GTA & Eurostat

(excl. live animals)





European  
Commission

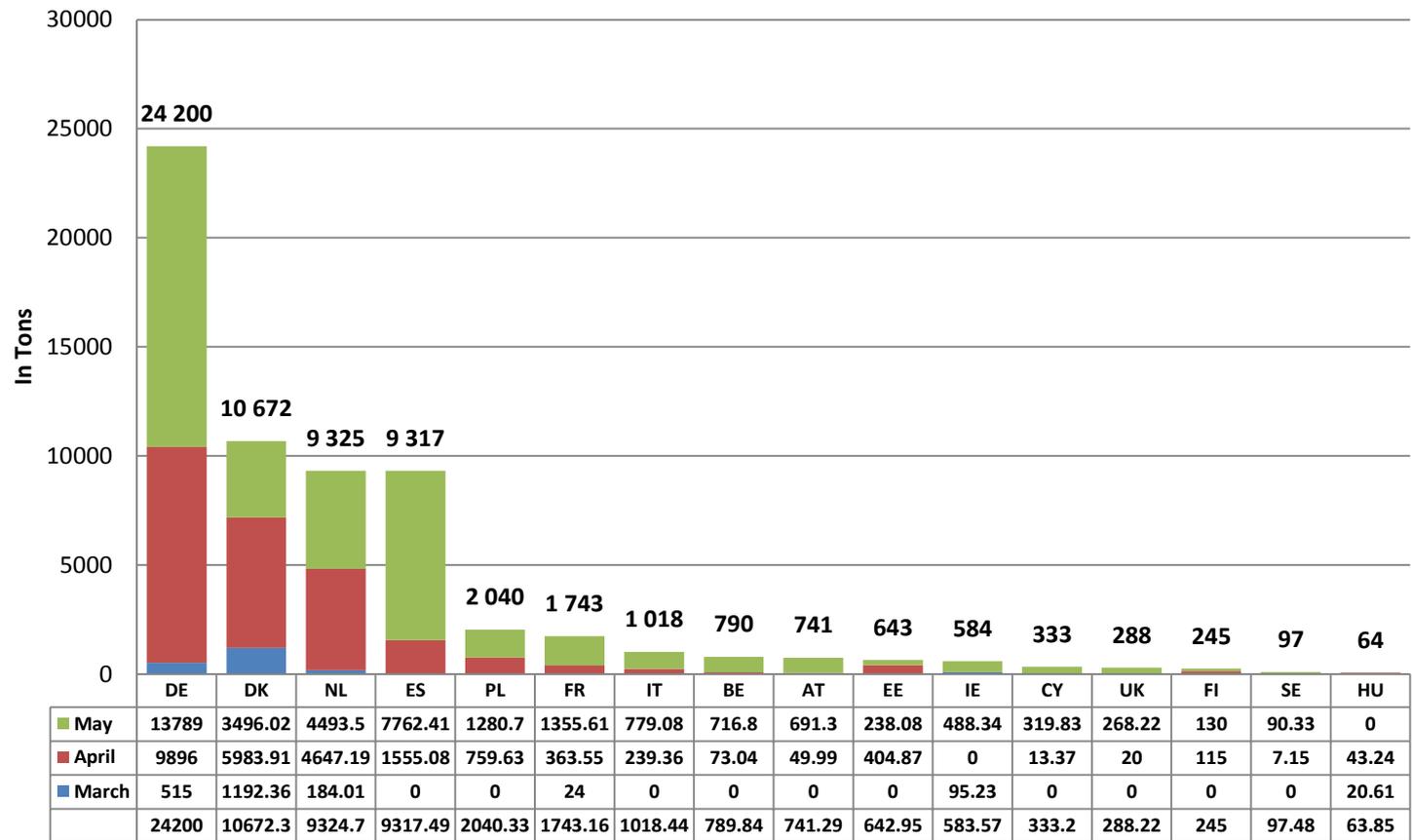


# Private storage – state of play



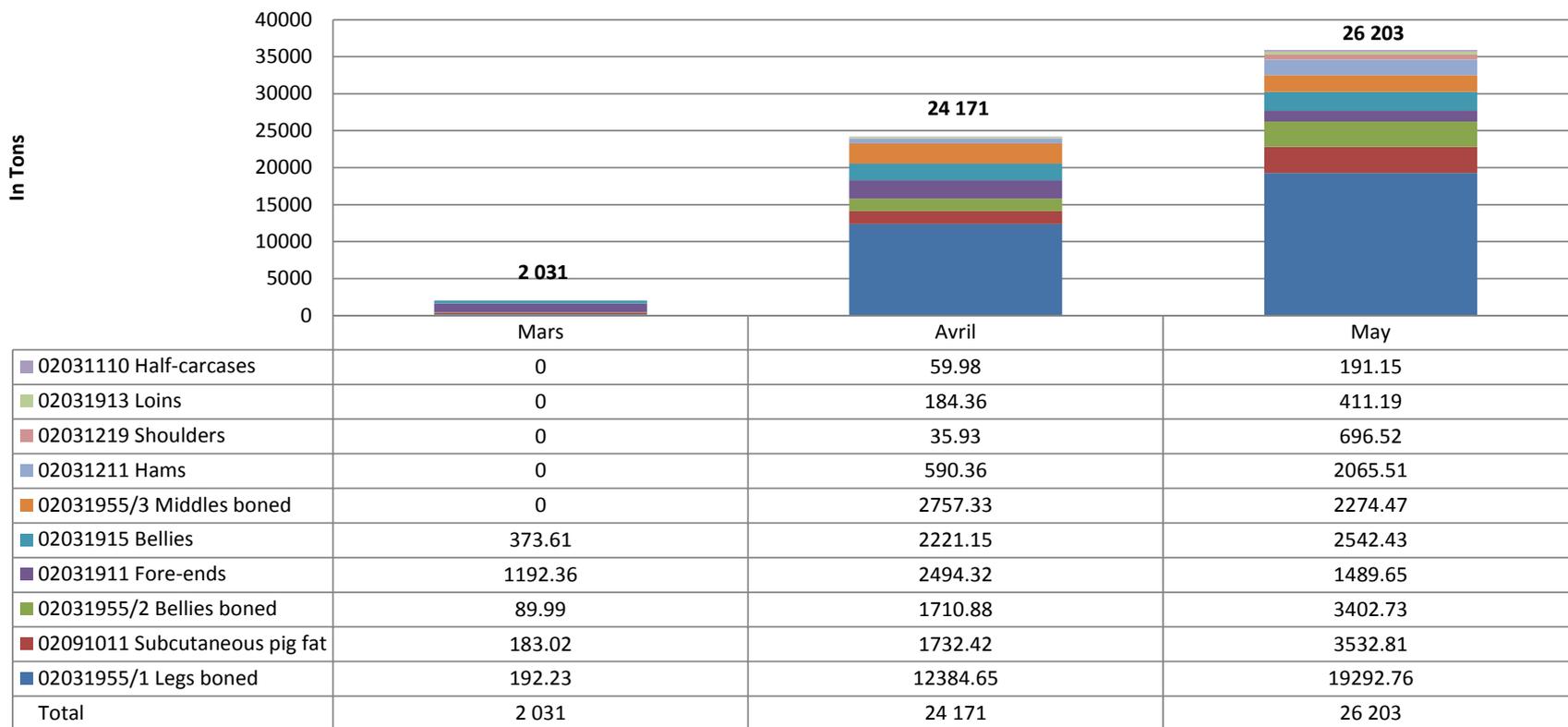
European  
Commission

## Quantities Released out of Private Storage





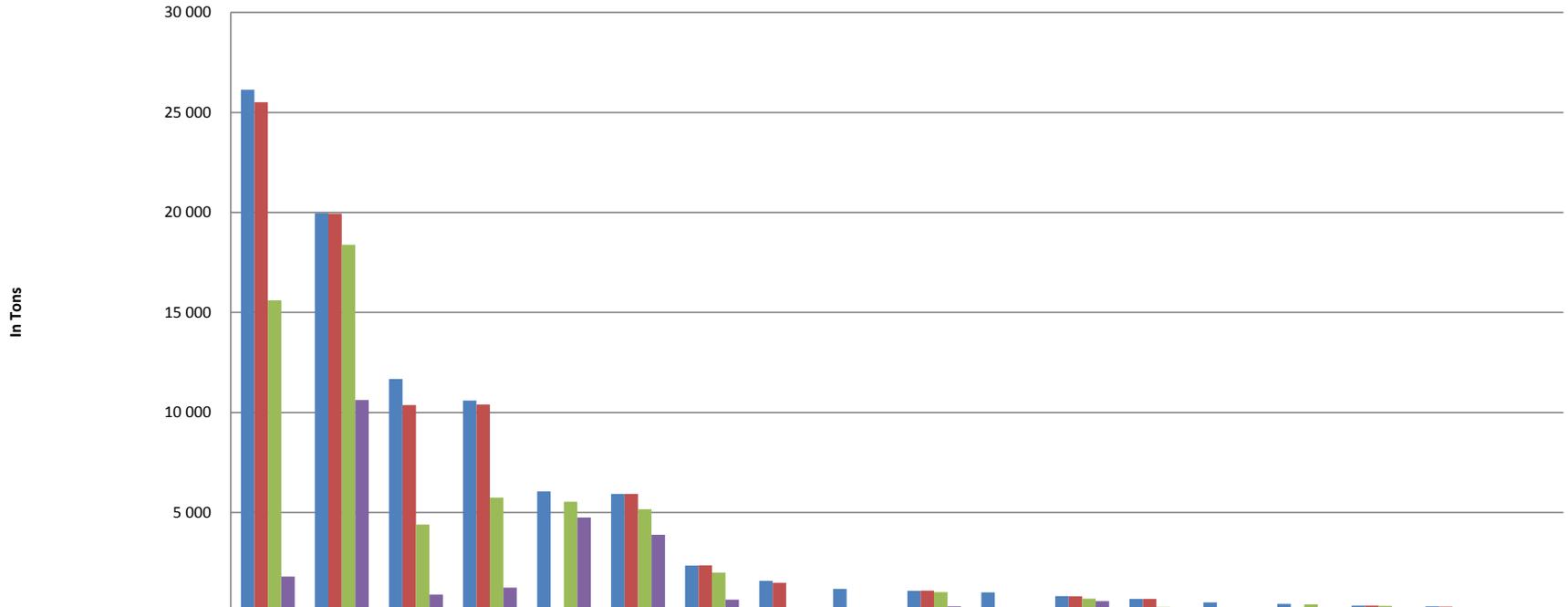
## Quantities Released out of Private Storage



# Private Storage



Evolution of Private Storage



	DE	ES	DK	NL	IT	PL	FR	IE	AT	BE	RO	FI	EE	PT	UK	CY	HU	SE
Quantities entered into PSA	26 137	19 968	11 676	10 594	6 048	5 928	2 344	1 576	1 180	1 085	1 000	820	681	505	435	345	300	245
Remaining in March	25 506	19 934	10 377	10 390	-	5 923	2 354	1 479	-	1 091	-	810	681	-	-	347	291	258
Remaining in April	15 610	18 379	4 393	5 743	5 533	5 163	1 991	-	-	1 018	-	695	276	-	408	333	247	251
Remaining in May	1 796	10 616	897	1 250	4 754	3 882	645	153	-	302	-	565	38	-	140	27	247	160



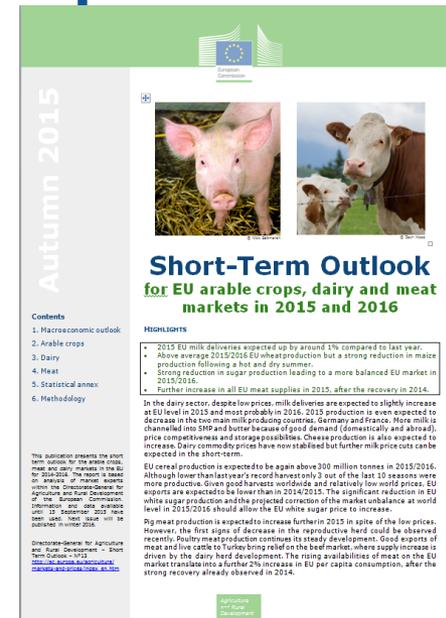
**Follow updates via the Pigmear Dashboard**

**[http://ec.europa.eu/agriculture/dashboards/index\\_en.htm](http://ec.europa.eu/agriculture/dashboards/index_en.htm)**

**&**

**[http://ec.europa.eu/agriculture/market-observatory/index\\_en.htm](http://ec.europa.eu/agriculture/market-observatory/index_en.htm)**

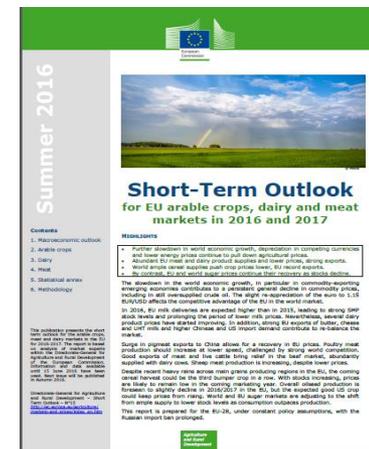
- *What is the STO ?*
  - Short term projections for main agri commodities (including beef and pork)
  - Based on reflections of DG AGRI market experts
  - EU balances on production / consumption / trade
  - Background on specific topics and developments
  - 2 years horizon (2016, 2017)
  - Published 3 times / year



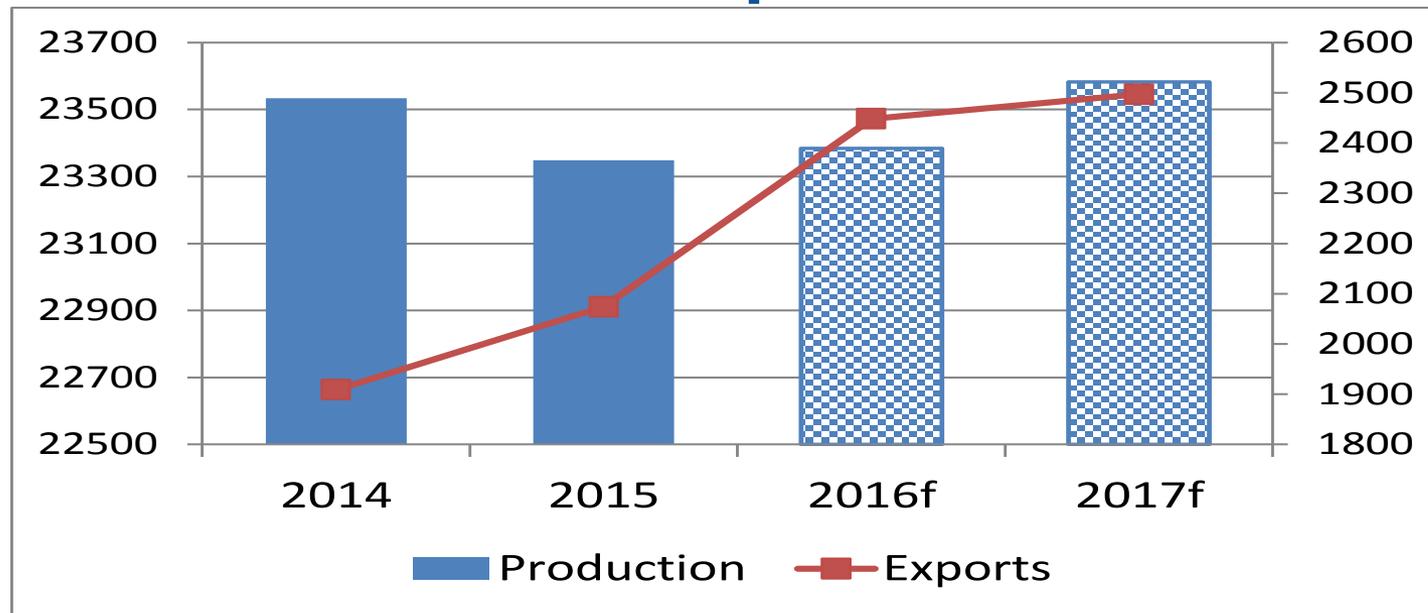
The cover of the report features the European Commission logo at the top. Below it, the title "Short-Term Outlook for EU arable crops, dairy and meat markets in 2015 and 2016" is prominently displayed. The cover includes two photographs: one of a pig and one of a cow. The text on the cover provides a brief overview of the report's content, including a table of contents and a list of highlights. The highlights section mentions that 2015 EU milk deliveries are expected to be around 1% higher than last year, and that EU exports are expected to be lower than in 2014/2015. The cover also includes a small text box at the bottom left that reads "This publication presents the short-term outlook for the arable crops, meat and dairy markets in the EU for 2015/2016. The report is based on the 10th of March meeting of the High Level Group of Experts on Agriculture and Rural Development of the European Commission. The report and data tables (PDF) are available on the website: <http://ec.europa.eu/agriculture/short-term-outlook>. The report will be published in November 2014." The cover also includes the contact information for the Directorate-General for Agriculture and Rural Development, Short Term Outlook - STO, located at [stoutlook@ec.europa.eu](mailto:stoutlook@ec.europa.eu) and <http://ec.europa.eu/agriculture/short-term-outlook>.

- *Sources of information*
  - Forecast groups, EU Member State experts
  - Stakeholders
  - Latest statistical data (Eurostat, ...)
  - Specialised market literature
- *Latest version:*

[http://ec.europa.eu/agriculture/markets-and-prices/short-term-outlook/index\\_en.htm](http://ec.europa.eu/agriculture/markets-and-prices/short-term-outlook/index_en.htm)



## Selected results STO: EU production and exports



# PORK

# Annex III



# EUROPEAN LIVESTOCK AND MEAT TRADES UNION UECBV



**Jean-Luc Mériaux**  
Secretary General

## 1<sup>st</sup> MEETING OF THE MEAT MARKET OBSERVATORY

15<sup>th</sup> July 2016



- **What is the UECEBV?**
- **UECEBV inputs to MMO**
- **UECEBV method of working**



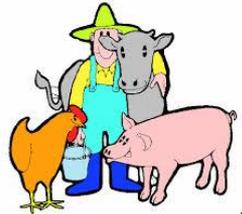
## What is the UECBV?

**UECBV** is the **European Livestock and Meat Trades Union**. It represents the national federations of:

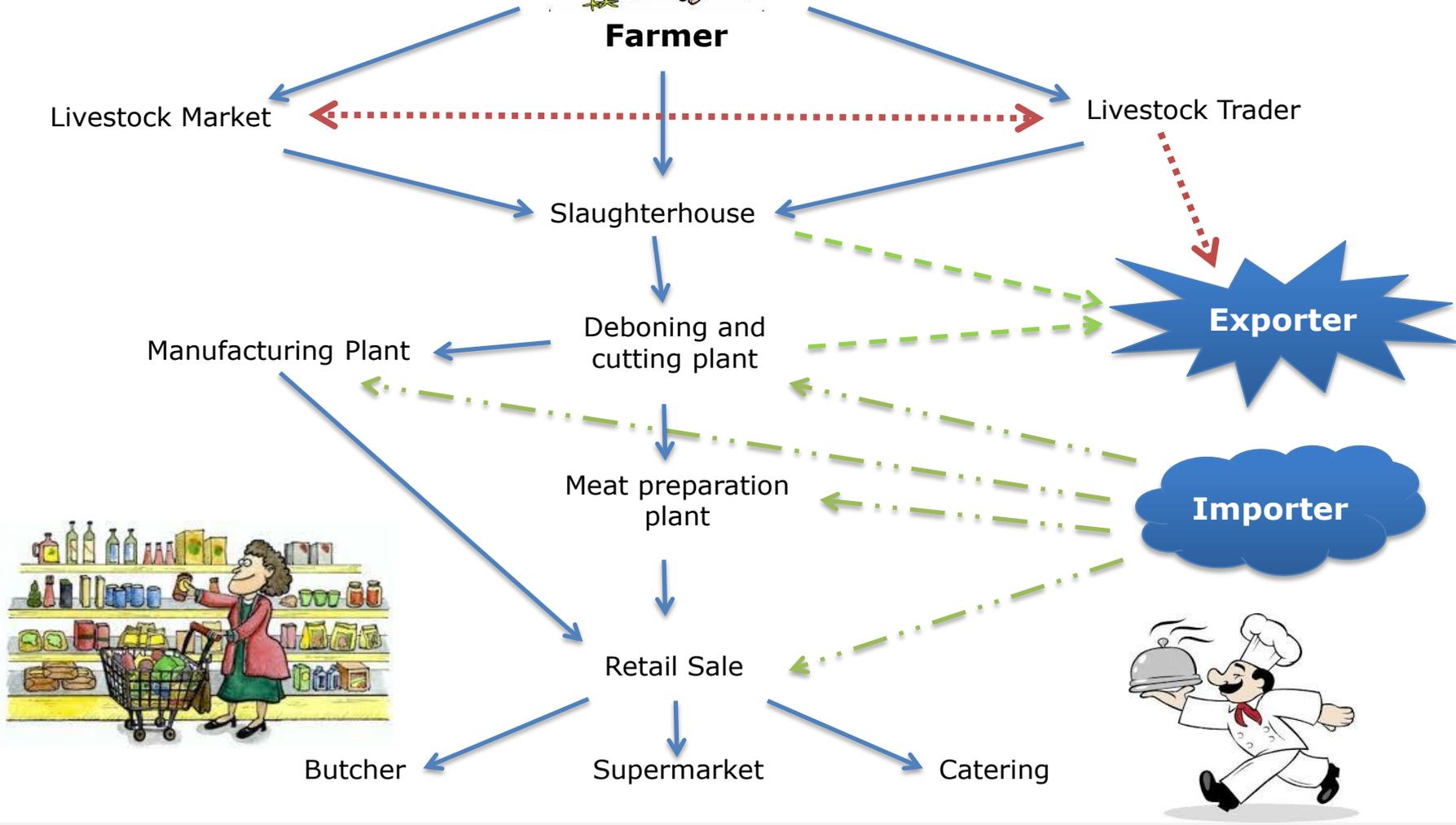
- livestock traders
- livestock markets
- meat industry: slaughterhouses, cutting and preparation plants
- wholesale meat traders
- international meat traders

**UECBV** focuses on **cattle, beef / horses, horsemeat / sheep and goats, sheep and goat meat / pigs, pork.**

# What is the UECBV?



**Farmer**





# What is the UECBV?

**Today, UECBV represents 54 associations out of:**

- **24 EU Member States** as well as certain EFTA countries and **EU candidate countries (Turkey).**
- Other countries, EU trade partners in the meat sector, are also associated to the UECBV (**Japan, Russia**)

### 3 European Associations

Livestock markets (AEMB)

Casings industry (ENSCA)

Ship suppliers (OCEAN)

In total, some **20,000 firms** of all sizes and over **230,000 jobs** are represented within the UECBV through its national member federations.





## Agriculture

Single Common Market Organization  
 Horizontal matters/market mechanisms,  
 Animal product market (beef, pork, poultry meat, sheep meat)  
 Management of market measures  
 Import quota management  
 Direct support  
 Agricultural policy analysis/perspectives  
 CAP  
 Rural development  
 Sustainability and quality  
 Promotion  
 Consumer perception/image of meat  
 Legal affairs/infringement procedure,  
 Simplification

## Health & Consumers

Animal health  
 Animal welfare  
 Import requirements  
 International affairs (SPS)  
 Biotechnology  
 Chemicals/contaminants  
 Nutrition, control & inspection  
 Food law/hygiene/public Health, alert system  
 Legal affairs/infringement procedure  
 Food information (labelling)

## Customs & Indirect taxation

Customs legislation  
 Import & export formalities  
 Customs code  
 Combined nomenclature/tariff classification  
 Tariff quota management  
 Transit procedure  
 Indirect taxation (VAT, excise duties)

# UECBV areas of expertise

## Competition

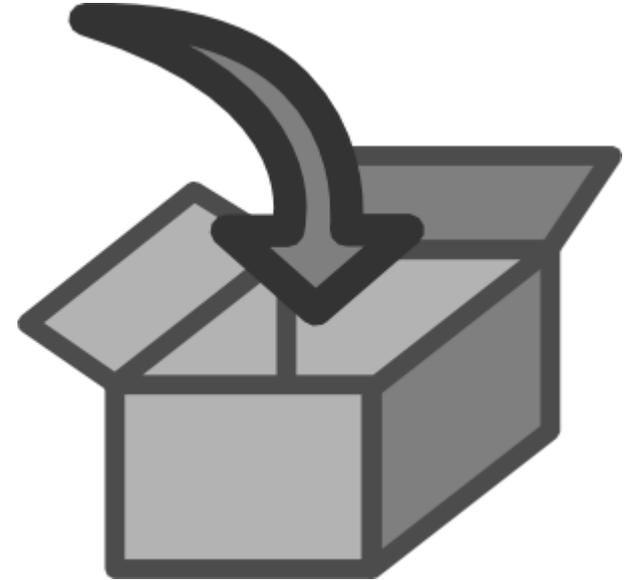
## Industry & EU funded research projects

## Climate change & Environment

## Social Affairs



- Consumption: trend
- Price: trend
- Cost of production: factors for increase
- Trade: trend -> Focus on:
  - ❖ Single market
  - ❖ Export
    - SPS Barriers
    - TBT (Customs classification)
    - Priorities list
  - ❖ Import





- Setting up a UECBV MMO Task Force:
    - CEOs and managers of EU meat industry
    - UECBV Meat Industry Section
    - UECBV International Meat Trade Section
  - Data:
    - List of available sources
    - Collection and analysis
    - Trend identification
  - Compliance:
    - To abide by the competition law and rules
  - UECBV experts at the MMO meetings:
    - Rotation according to the agenda
- AIM** → providing the best expertise

---

---

# U.E.C.B.V.



[www.uecbv.eu](http://www.uecbv.eu)

**Thank you for your attention!**