

5. MEAT

Fourth and last year of increase in beef production as EU cow herd starts to decrease

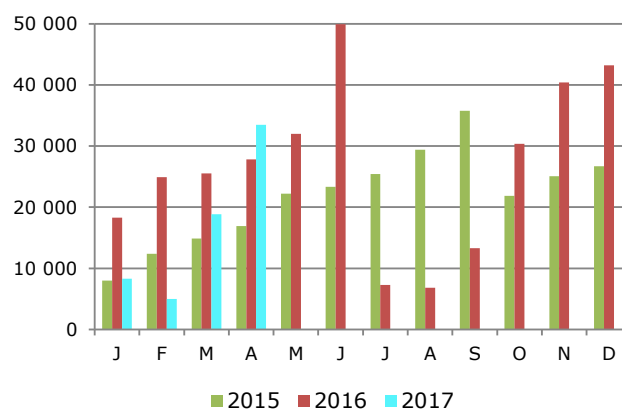
Although the suckler cow herd expanded by 31 000 heads in 2016, according to the latest figures from the livestock survey of December 2016, the EU's total cow herd was reduced by 60 000, owing to the slaughtering of dairy cows in many EU countries. However, this figure is less than 1 % of the total EU cow herd, estimated at 35.5 million. The exceptions are Ireland and the Netherlands, the expansion of whose dairy herds is driving the increase, and Spain, where the beef herd expanded for a further year.

In the first quarter of 2017, net beef production in the EU nearly stabilised (+0.2 %). By contrast, it grew by 2.1 % in the first quarter of the previous year, resulting in a net increase of 1.4 % in EU beef production.⁵ This slowdown is attributable mainly to a lower slaughtering rate for bulls and bullocks (-2.2 %), while the rate for cows went down from an annual figure of 6.3 % to 0.8 % in the first quarter of 2017. Slaughter weights remained more or less stable for all categories. All countries apart from Belgium, Greece, the Netherlands and Sweden reduced their slaughtering of cows in the first quarter of 2017. Net beef net production is expected to grow throughout the year, though more slowly than in 2016 (0.8 %). As the total EU cow herd was almost stable in December 2016, there is still considerable potential for beef production at EU level. The restructuring of the dairy sector will continue, but we are already seeing the first signs of a slowdown in certain EU countries. A 1.4 % fall in production is expected in 2018, after 4 consecutive years of moderate increases. The level of decline is still uncertain, as it is hard to predict the exact timing and pace of change. Productivity gains in the dairy sector and the profitability of the various beef production systems are the main drivers in the medium term.

Exports of bovine livestock take a bumpy road, while beef exports steady grow

EU exports of live bovine animals fell slightly in the first quarter of 2017 by nearly 3 %, mainly because of exports to Turkey in January and February. Exports to Turkey seem to have started again in March, followed by a boost in April, the Czech Republic and Hungary being the bigger suppliers. The relaxation of Turkish requirements with respect to blue tongue vaccination could facilitate the live trade, but competition from Uruguay and, to a lesser extent, Brazil, is to be expected. At the same time, Israel has established itself as a growing destination for live animals, and Algeria has opened its market to larger volumes of imports from the EU, which could result in an overall increase of 15 % in live exports in 2017.

Graph 27 Monthly EU exports of live cattle to Turkey (heads)



Source: DG Agriculture and Rural Development, based on Eurostat

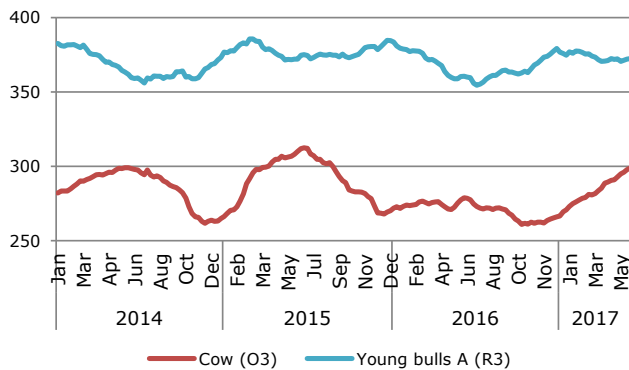
Beef exports rose by 26 % in the first 4 months of 2017, the largest quantity exported during that period in the last 5 years. Beef demand from Hong Kong is the key driver for this increase, although it compares with lower EU exports in January 2016. Exports of low-value cuts to new destinations like the Philippines are also worth mentioning. Overall, the outlook for exports in 2017 is positive (+10 %), thanks to the substantial surge in early 2017, the EU's (renewed) access to certain (niche) markets and the extensive portfolio of other destinations. This helps to sustain the price in the domestic market and valorise the entire carcass.

EU beef imports fell by 10 % in the first 4 months of 2017. The main reason was a major fall in imports from Brazil, by almost 20 % year-on-year, or 7 000 t. This was caused by the revaluation of the Brazilian currency and the meat scandal triggered by the Brazilian police's investigation into irregularities in health inspections at 20 meat production plants, which weakened Brazil's position as a global meat trader. Argentina, Uruguay and the US, on the other hand, are partly making up the difference by raising the level of their exports to the EU by 56 %, 21 % and 24 % respectively. Australian beef exports to the world market are down, mainly owing to a recapitalisation of the beef herd. The country's exports to the EU ended 6 % lower in 2016, and the first 4 months of 2017 recorded an even bigger drop of 32 % year-on-year. Despite the high beef price in the US and the expensive dollar, exports to the world market and to the EU are doing surprisingly well. EU imports are expected to increase only marginally in 2017, by 1 %, even if Brazil returns to the EU market by the end of 2017, as an ample supply of domestic production and sustained beef demand in Asia make the EU market less attractive.

⁵ When adjusted for the extra day in February 2016.

Towards higher EU beef prices in 2017?

Graph 28 EU price for certain categories of bovine animals (EUR/100 kg)



Source: DG Agriculture and Rural Development

The average price of adult male bovines recovered at the end of 2016 and stayed more-or-less stable, at around EUR 375/100kg, for the first months of 2017. EU cow prices (category O3) stayed relatively flat and low in 2016 (around EUR 270/100 kg). Since the end of 2016, prices for cows have also been rising steadily and seem to be resuming their characteristic seasonal pattern. The slowdown in the slaughter rate of cows during the first quarter is probably the reason for the price change observed. Stabilising production, against the background of an improving trade balance, is expected to take some pressure off the beef market in 2017.

In 2016, the availability of beef for consumption in the EU increased by 2.3 %. Consumption is expected to continue increasing in 2017, but at a much lower rate (+0.6 %). In 2018, lower availability on the EU market could depress EU consumption levels.

Pigmeat: decline in EU production in 2017

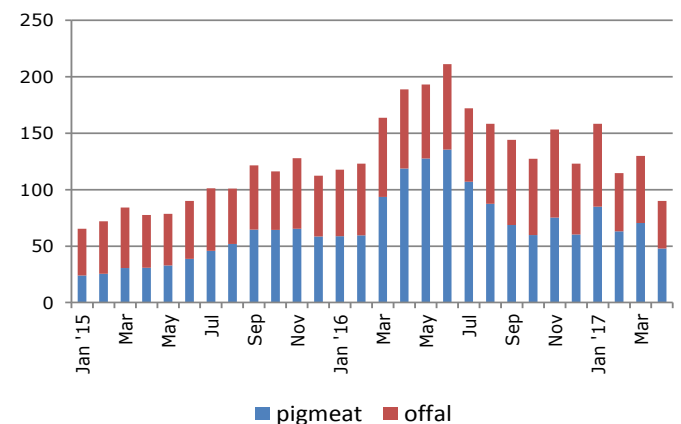
The December 2016 livestock survey announced a new 2 % reduction in the EU breeding pig herd, the same reduction as in 2015. However, it also showed a 1.4 % increase in the number of sows covered for the first time (after a 6 % drop in 2015). As a result, pigmeat production reversed its existing trend, falling in volume by 1.4 % in the first quarter of 2017. This happened in all the main producing countries but the Netherlands and Spain, where production rose. The negative trend is expected to continue at a more moderate level throughout 2017, as some farms increase production in response to high prices, resulting in a total annual production of around 23.4 million t for the year (-0.6 % compared to 2016). EU pigmeat production is expected to stabilise in 2018.

Falling EU pigmeat exports

The increase in EU pigmeat exports driven by demand from China continued until March 2017. The expected

decline began in April, with a 23 % drop in EU exports compared with March 2017 and a 30 % drop compared with April 2016. There were 3 main factors: rising EU prices, which make EU pigmeat less competitive on export markets; a fall in China's overall import demand (-14 % in April); and the temporary suspension (now lifted) of licences for export to China of 2 major German processors. Canada has benefited most from the situation, becoming the second largest exporter to China in April, after Spain, with 20 300 t (a 19 % share, 96 % up on the previous year). However, in late May China detected ractopamine, the banned growth promoter, in a shipment of pigs' feet from Canada, which may lead to at least a temporary ban on Canadian exports. The exports to China of all leading EU exporters fell in April. Denmark's share fell to 7.5 %, Germany's to 8 %, the Netherlands's to 8 % (down from 22 % in the first 3 months of 2017) and Spain's to 21 %.

Graph 29 EU pigmeat and offal exports to China (1000 t, product weight)



Source: DG Agriculture and Rural Development, based on Eurostat

The first quarter of 2017 saw significant growth in exports to other destinations, such as Japan (+9 %), Hong Kong (+42 %), South Korea (+39 %), the US (+21 %) and Australia (+8 %). However, the trend became negative in April (-24 % aggregated for the 5 countries, compared to March, and -13 %, compared with a year previously).

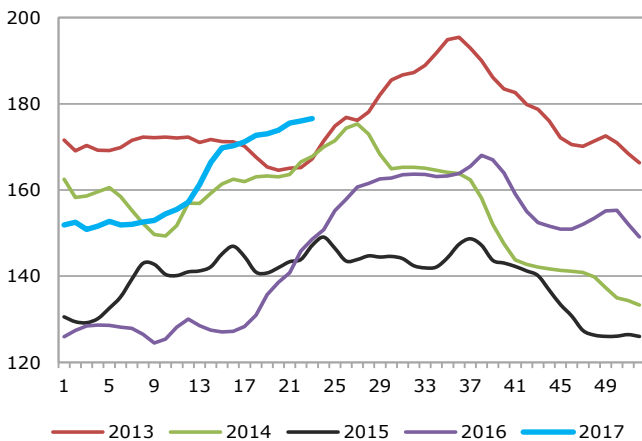
Overall, even if world demand for pigmeat in 2017 is expected to be similar to the previous year, EU pigmeat exports will be affected (-9 %) by falling availability and the associated higher internal prices. This makes other major exporters, i.e. the US, Canada and Brazil, more competitive. In the case of Brazil, it will depend on what happens as a result of the meat scandal. Although China lifted the associated restrictions in March, and Hong Kong has also done so in part, Brazilian exports still fell in April by 59 % (China) and 41 % (Hong Kong), compared with the previous year. The fall in EU pigmeat exports is expected to be smaller in 2018 (-2 %), thanks to a small increase in production (assuming that the Russian import ban on sanitary grounds brought in in

March 2014 remains effective until 2018, thereby making trade impossible).

Surge in EU pigmeat prices

Prices at the start of 2017 were substantially higher than in 2016 (around EUR 150/100kg, as opposed to EUR 126/100kg) and remained stable for the first 2 months of the year. This was followed by a rapid price rise of over EUR 10/100kg a month, culminating in a price of EUR 175.5/100kg in June 2017 - a level that has not been reached since 2013. As feed prices have remained fairly stable, farmers' margin over feed costs is improving. Since the prices in the EU's main competitors are falling, higher EU prices will put a good deal of pressure on EU exports in the months to come.

Graph 30 EU weekly prices for pigmeat, class E (EUR/100 kg)

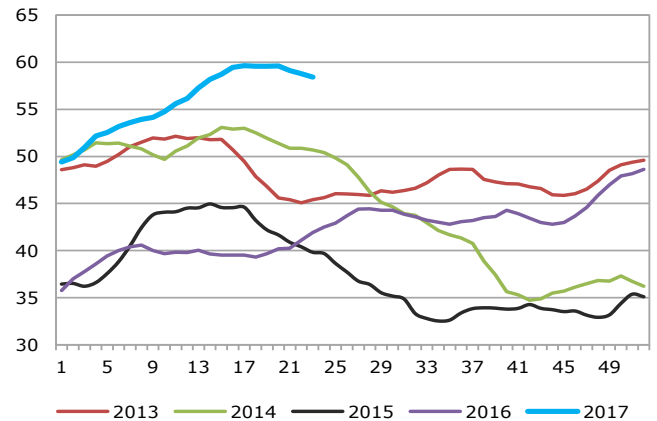


Source: DG Agriculture and Rural Development

The EU average piglet price continued on a rising trend driven by shortage of supply, reaching a historical maximum of EUR 59 in mid-April, compared with EUR 40 a year before. This trend gradually gave way to a seasonal downward trend in mid-May.

EU consumption of pigmeat fell to 31.7 kg per head of population in 2016, as exports were performing well and domestic production was down. In 2017, with less favourable prospects for EU exports, consumption is expected to rise slightly to 31.8 kg/capita. A similar rise is expected in 2018, to 31.9 kg/capita.

Graph 31 EU average weekly prices for piglets (EUR/head)



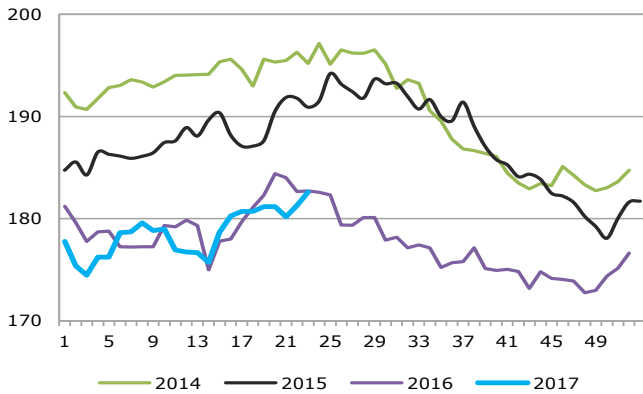
Source: DG Agriculture and Rural Development

Poultry: slower expansion of EU production

In 2016, EU poultry meat production grew in volume by 4.4 % compared to 2015, reaching 14.4 million t. Growth was driven by expanding production in Poland (+13 % or +257 300 t). EU production continued to rise in the first quarter of 2017, though at a lower rate (+1.9 %), as there has been a bird flu (avian influenza) epidemic since November 2016. With one exception, the countries that recorded the highest number of bird flu cases saw a reduction in output: Bulgaria (-12.5 %), Hungary (-7.3 %), Germany (-1.3 %) and France (-0.2 %). Poland bucked the trend by increasing production, but only by 1.1 %. These reductions were offset by significant increases in other major producers less affected by the epidemic: the Netherlands (+1.6 %), Spain (+3.9 %) and the UK (+10.5 %). Overall, EU production is expected to increase by 1.7 % in 2017, in a context of strong competition and export restrictions on countries affected by bird flu. The slowdown in production growth is expected to continue in 2018 (+0.8 %).

Prices competitive with the US

EU broiler prices are slightly below 2016 levels. They stayed below EUR 180/100kg until the seasonal spike that raised prices from EUR 175/100kg in April to EUR 182/100kg in June. However, the gap between EU and Brazilian prices widened as the broiler price in Brazil dropped to EUR 100/100kg at the beginning of the year, and then to EUR 85/100kg in June. On the other hand, the price of US broilers overtook the EU price for the first time in May 2017 and continued on a rising trend, reaching EUR 219/100kg in June. The opposite price trends in Brazil and the US seem to be 2 sides of the same coin, as Brazil tries to improve lagging exports and the US benefits from high global demand as a result of the sanitary issues faced by competitors.

Graph 32 Weekly EU broiler prices (EUR/100 kg carcass)

Source: DG Agriculture and Rural Development

Trade maintained despite bird flu bans

Although EU prices are still relatively low, EU exports fell between January and April 2017, mainly because of the country-wide import bans imposed by some major partners. Exports to the 2 main export destinations for EU poultry in 2016 more than halved over those 4 months: South Africa (-58 %) and the Philippines (-62 %). In the case of South Africa, another reason for the lower figure is the imposition of a provisional safeguard duty of 13.9 % on imports from the EU of bone-in portions of chicken, which has been in place since December 2016. As a result, South Africa is no longer the EU's main export destination, its share having fallen from 16 % to just 7 % (-43 900 t up to April). It is now the 6th major importer, after Hong Kong (10 %), Ukraine (9 %), Saudi Arabia (8 %), Benin (8 %) and Ghana (7.5 %). Reductions in exports to South Africa have been offset by rising exports to Hong Kong (+36 %) and Ukraine (+58 %), and also to African markets such as Ghana (with a 49 % rise), RDC Congo (171 %) and Gabon (106 %), which have now an aggregate share of 16 %. EU exports are thus showing that they have the flexibility to adapt to various disruptions of trade, and moderate growth in exports is expected in 2017 (+1 %).

The US has benefited greatly from the import bans and duties imposed by South Africa on EU countries, increasing its exports from 9 700 in 2016 to 35 000 t in the first quarter of 2017. The situation could change if South Africa begins to lift the bans and US prices stay above EU levels. Brazil, on the other hand, has not been able to benefit much from the situation, as its exports have also suffered restrictions since the meat scandal. Most restrictions on Brazilian exports have already been lifted, but the consequences are still unclear. On 12 June, the European Commission pointed to a range of critical deficiencies identified by a team of EU health inspectors and asked for a number of measures to be taken, including physical checks on all consignments from Brazil at EU entry points.

EU poultry meat imports fell by 5 % in volume in the first 4 months of 2017, compared with the same period in the previous year. Imports from the main suppliers fell significantly: Brazil (-6 %), affected by the meat scandal, and Thailand (-11 %). Thailand is increasing exports to other destinations, such as Japan and Malaysia, and taking advantage of shortages in China, which is experiencing severe outbreaks of bird flu across the country. On the other hand, Ukraine increased its share of imports into the EU to 60 % in the same period, even though there were almost no imports in January, as the EU had banned imports from Ukraine following the outbreak of bird flu in December 2016. By May 2017 Ukraine had used 50 % of its 16 800-tonne tariff-rate quota (TRQ) for poultry meat and preparations and only 18 % of the 20 000-tonne TRQ for chicken carcasses. In contrast to previous years, it is thus not expected that EU imports of poultry meat increase in 2017.

EU consumption per head of population is expected to rise from 23.8 kg in 2016 to 24.1 kg in 2017. It is expected to still rise in 2018, to 24.2 kg.

Sheep: increase in EU production continues

According to the 2016 December livestock survey, the number of sheep in the EU increased by 1.4 million (+1.6 %), mainly in Spain (by 394 000), the UK (437 000) and Romania (268 000). On the other hand, the number of ewes put to the ram remained relatively static.

After a drop in the number of goats in 2015, the trend was reversed, mainly as a result of major efforts to rebuild the herd in Spain (+385 000 heads in 2 years). The number of goats in the Netherlands rose by 36 000, while the figure for Romania was 43 000 and that for Italy 65 000. Numbers in Greece, on the other hand, dropped below 4 million (-129 000) for the first time in years. The total flock of breeding ewes and nanny-goats increased slightly in 2016 (+0.2 %). This will have a small impact on future production.

EU net sheep and goat production increased by 2.1 % (907 000 t) in 2016.⁶ Although net production of sheep and goat meat fell by 2.7 % in the first quarter of 2017, it is expected to catch up and increase by 2.1 % in 2017, mainly driven by production increases in the UK, Spain and Romania. The drop in the first quarter can be attributed to Easter (and the larger number of sheep and goats slaughtered at that time of year), which was in April in 2017. During the same period, and unlike the other major producing countries, the UK recorded a 7 % increase in slaughterings, confirming the carry-forward of slaughterings from 2016 to 2017.

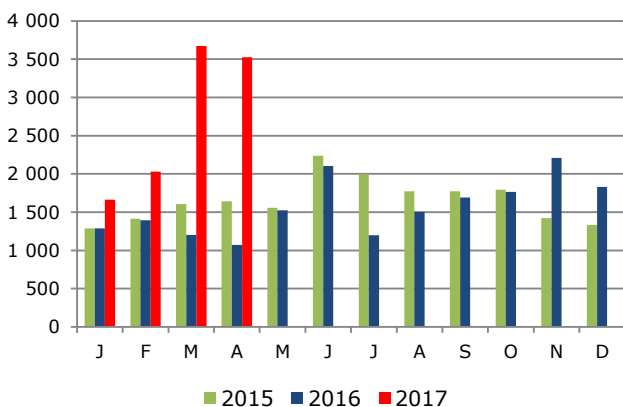
⁶ The figure was adjusted compared to last edition to reflect changes in on-farm slaughterings.

In the first 4 months of 2017, EU live exports fell by 2 % year-on-year, with Jordan accounting for most of the change. The share of lamb grew last year from 1/5 to 1/3 of total live exports. This trend seems to be continuing in 2017, with lamb accounting for almost 40 % of the total. Four export partners, all located around the Mediterranean, accounted for almost 95 % of trade. Light lamb exports from Spain seem to be finding new outlets in Morocco and Algeria. Overall, live exports are expected to fall slightly, by 1 %, in 2017, which implies they will remain just under the high level recorded in 2016.

Sheep production driven by a recovery in meat exports

In contrast, exports of sheep and goat meat are doing better than expected, though they remain at a relatively low level. After a sharp drop in 2015 and 2016, exports seem to be catching up with pre-2015 levels again. A 120 % increase was recorded during the first four months of 2017. Exports to Hong Kong are doing especially well again. Thanks to the weaker pound sterling, the UK is becoming more competitive on the international market. A 60 % increase is expected by the end of 2017.

Graph 33 Monthly EU exports of sheepmeat & goat meat (t)



Source: DG Agriculture and Rural Development

In the first 4 months of 2017, sheepmeat imports dropped by almost 19 % year-on-year. Although New Zealand stepped up its exports to the world in the first months of the year, it clearly favoured the Asian markets, especially China, and shifted part of its exports away from the EU. Another factor is the unfavourable trend of the New Zealand dollar against

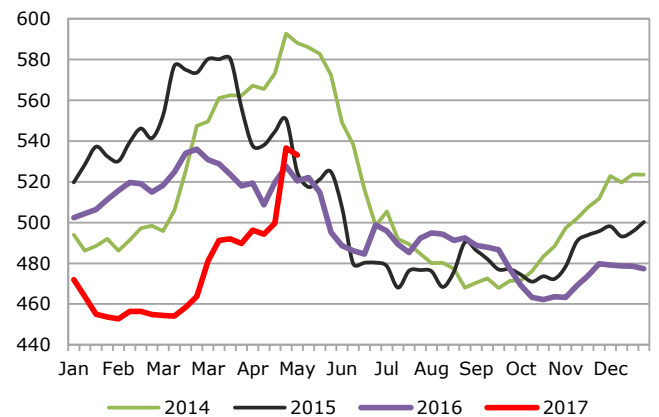
sterling and, in recent months, against the euro as well, which has made competition with lamb from the EU slightly tougher. New Zealand still accounts for over 80 % of total EU sheepmeat imports. The second biggest exporter to the EU is Australia. By the end of 2017, imports are expected to have fallen by 15 % compared with 2016.

Will prices continue rising?

Heavy lamb carcass prices started 2017 at a relatively low level, fluctuating at around EUR 455/100kg from January to March. By the end of March and during April, the price rose steadily to almost EUR 490/100kg (at Easter), followed by an even steeper climb in May to EUR 540/100kg, above the 2016 price. The pattern is very similar to the situation in 2014, but at a lower level.

Light lamb carcass prices followed a declining trend, below the average over the last 5 years, to a level of EUR 475/100kg in mid-March. The seasonal upswing started earlier and seems to be continuing, but at a level EUR 20 below the price of previous years.

Graph 34 EU heavy lamb prices (EUR/100 kg carcass)



Source: DG Agriculture and Rural Development

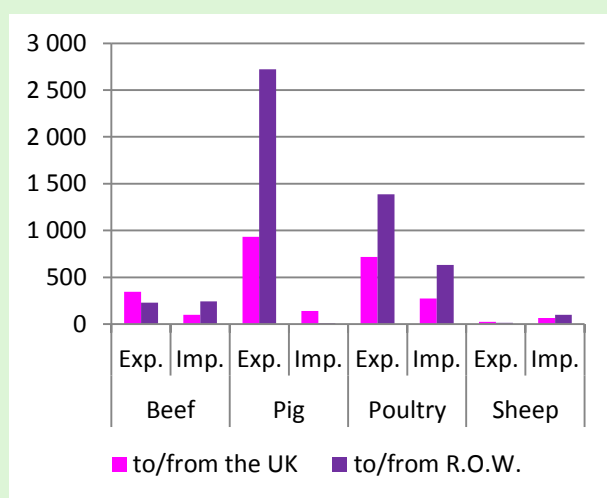
With meat exports increasing and imports declining, less sheepmeat is expected to be available on the EU market. Consequently, per capita consumption in the EU could drop by 1.5 % in 2017, but would rebalance again in 2018, thanks to adjustments in production and imports. Since consumption in the EU accounts for only 2.5 % of total meat consumption, or 1.9 kg/capita, small changes have a negligible effect on the meat consumption basket as a whole.

EU-27 trade with the UK and the rest of the world (R.O.W.) in the meat and dairy sectors

In this edition, we start providing information on meat and dairy trade of the EU-27 to the UK and the other countries. In the next edition, trade flows for cereals and eggs will be detailed.

In 2016, 30 % of EU-27 meat exports were shipped to the UK. Trade between the UK and other EU members has grown steadily over the last few decades. The UK is a significant net importer of beef, pigmeat and poultry meat from the EU-27, mainly from the Netherlands, Ireland, Poland, Germany and Denmark. By contrast, the UK is a net exporter of sheepmeat to the EU-27.

Graph 35 EU-27 meat trade in 2016 (1000 t)



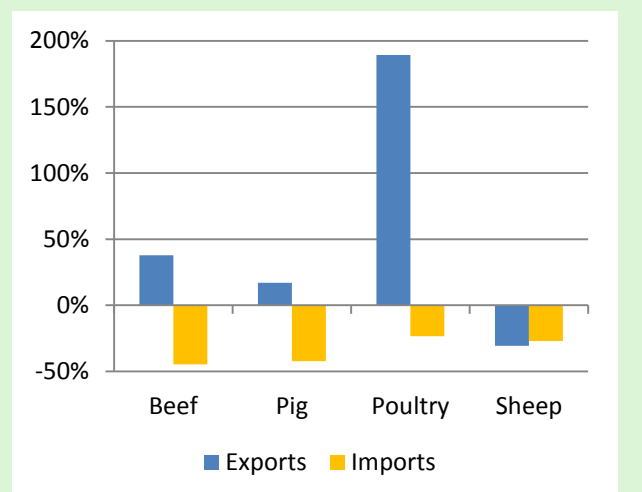
Source: DG Agriculture and Rural Development, based on Eurostat

While the EU-27 exports to the R.O.W. mainly frozen pigmeat, exports to the UK are more diversified and include fresh, salted and prepared pigmeat with a price premium of nearly 20 %. The fact that the EU-27 trades different products with the UK than with other countries is reflected in the average unit value. Similarly, the price of poultry meat exported to the UK is almost 3 times the average price of poultry exports to the R.O.W.

The EU-27 imports only fresh and chilled sheepmeat from the UK, while most imports from the R.O.W. are frozen. Nevertheless, the average price of the sheepmeat imported from the UK is cheaper, most probably because whole carcasses are traded, while only the best cuts travel from Oceania to Europe.

The UK is also an important partner of the EU-27 for live animals, breeding animals included. In the last 3 years, more than 500 000 pigs were exported yearly to the UK. These were mainly fattened pigs, but piglets were also included. Trade with the UK in live poultry, including female chicks, is also very significant in both directions.

Graph 36 Average price difference between EU-27 exports to the UK and to the R.O.W. in 2016 (%)



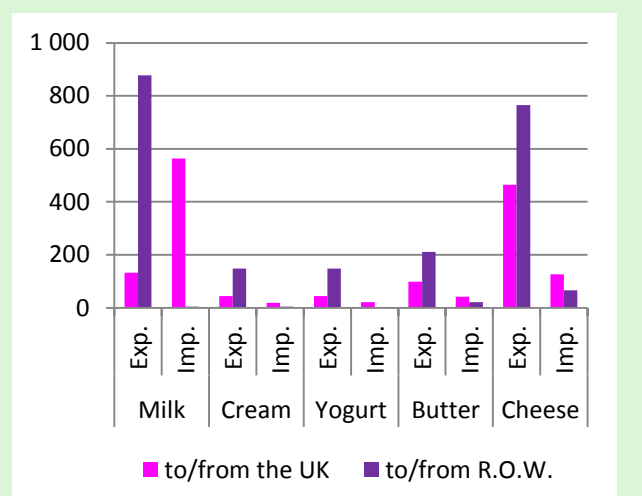
Note: This graph shows that the average export price of poultry from the EU-27 to the UK is up to 190 % higher than the export price to other countries. This has to do with differences in the cuts exported and quality.

Source: DG Agriculture and Rural Development, based on Eurostat

In the dairy sector, the UK is a major importer of cheese from Ireland, France and Germany. The UK supplies liquid milk to Ireland. The main EU-27 cheese exports to the UK are fresh cheese (25 % of 2016 exports), cheddar (20 %) and fresh mozzarella (15 %). Interestingly, imports from the UK are very similar (40 % of cheddar and 14 % of mozzarella).

Generally, products traded with the UK have a lower average price than products traded with the R.O.W. This applies particularly to liquid milk, because the EU-27 exports mainly packaged milk to the R.O.W. and imports liquid milk in bulk from the UK. The average price of cheese exports to the UK is also lower, mainly because of the different mix of products.

Graph 37 EU-27 dairy trade in 2016 (1000 t)



Source: DG Agriculture and Rural Development, based on Eurostat

MEAT

Table 5.18 EU-28 overall meat balance (1000 t carcass weight equivalent)

	EU-28						% variation				
	2013	2014	2015	2016	2017f	2018f	14/13	15/14	16/15	17/16	18/17
Gross Indigenous Production	43 577	44 433	45 852	47 057	47 267	47 334	2.0	3.2	2.6	0.4	0.1
Live Imports	1	2	2	2	2	2					
Live Exports	179	197	247	291	317	323	10.3	25.2	17.9	9.1	1.7
Net Production	43 399	44 238	45 607	46 768	46 952	47 013	1.9	3.1	2.5	0.4	0.1
<i>EU-15</i>	36 348	36 728	37 654	38 283	38 365	38 245	1.0	2.5	1.7	0.2	-0.3
<i>EU-N13</i>	7 051	7 510	7 953	8 486	8 587	8 768	6.5	5.9	6.7	1.2	2.1
Meat Imports	1 311	1 332	1 368	1 400	1 379	1 426	1.6	2.7	2.3	-1.5	3.4
Meat Exports	3 740	3 539	3 811	4 534	4 333	4 322	-5.4	7.7	19.0	-4.4	-0.3
Consumption	40 970	42 031	43 165	43 634	43 998	44 117	2.6	2.7	1.1	0.8	0.3
Population (mio)	506	508	509	511	513	514	0.3	0.3	0.3	0.3	0.3
Per Capita Consumption¹ (kg)	64.6	66.1	67.7	68.3	68.6	68.7	2.3	2.5	0.9	0.5	0.0
Self-sufficiency rate %	106	106	106	108	107	107					

¹ In retail weight. Coefficients to transform carcass weight into retail weight are 0.7 for beef and veal meat, 0.78 for pigmeat and 0.88 for both poultry meat and sheep and goat meat.

Table 5.19 EU-28 beef/veal market balance (1000 t carcass weight equivalent)

	EU-28						% variation				
	2013	2014	2015	2016e	2017f	2018f	14/13	15/14	16/15	17/16	18/17
Gross Indigenous Production	7 499	7 694	7 862	8 113	8 213	8 103	2.6	2.2	3.2	1.2	-1.3
Live Imports	0	0	0	0	0	0					
Live Exports	109	114	178	219	252	257	5.3	55.5	23.2	15.0	2.0
Net Production	7 390	7 580	7 684	7 894	7 961	7 846	2.6	1.4	2.7	0.8	-1.4
<i>EU-15</i>	6 678	6 791	6 830	6 984	7 026	6 921	1.7	0.6	2.3	0.6	-1.5
<i>EU-N13</i>	712	789	854	910	934	925	10.8	8.2	6.6	2.7	-1.0
Meat Imports	304	308	300	304	307	318	1.5	-2.6	1.3	1.0	3.5
Meat Exports	161	207	209	244	268	271	28.9	0.9	16.6	10.0	1.0
Consumption	7 533	7 681	7 775	7 954	8 000	7 893	2.0	1.2	2.3	0.6	-1.3
Per Capita Consumption¹ (kg)	10.4	10.6	10.7	10.9	10.9	10.7	1.6	0.9	2.0	0.3	-1.6
<i>Share in total meat cons. (%)</i>	18.4	18.3	18.0	18.2	18.2	17.9					
Self-sufficiency rate (%)	100	100	101	102	103	103					

¹ In retail weight. Coefficient to transform carcass weight into retail weight is 0.7 for beef and veal meat.

Table 5.20 EU-28 pigmeat market balance (1000 t carcass weight equivalent)

	EU-28						% variation				
	2013	2014	2015	2016e	2017f	2018f	14/13	15/14	16/15	17/16	18/17
Gross Indigenous Production	22 384	22 568	23 276	23 589	23 442	23 494	0.8	3.1	1.3	-0.6	0.2
Live Imports	. 05	. 11	. 25	. 26	. 22	. 22					
Live Exports	26	36	21	10	5	5	36.2	-42.0	-52.1	-49.0	5.0
Net Production	22 358	22 533	23 256	23 579	23 437	23 489	0.8	3.2	1.4	-0.6	0.2
<i>EU-15</i>	19 054	19 074	19 716	19 920	19 785	19 745	0.1	3.4	1.0	-0.7	-0.2
<i>EU-N13</i>	3 304	3 459	3 540	3 660	3 652	3 743	4.7	2.4	3.4	-0.2	2.5
Meat Imports	16	14	11	12	12	13	-12.5	-19.6	6.0	2.0	8.0
Meat Exports	2 238	1 947	2 217	2 793	2 542	2 491	-13.0	13.9	26.0	-9.0	-2.0
Consumption	20 135	20 600	21 050	20 798	20 907	21 011	2.3	2.2	-1.2	0.5	0.5
Per Capita Consumption¹ (kg)	31.0	31.6	32.2	31.7	31.8	31.9	2.0	1.9	-1.5	0.2	0.2
<i>Share in total meat cons. (%)</i>	49.1	49.0	48.8	47.7	47.5	47.6					
Self-sufficiency rate (%)	111	110	111	113	112	112					

¹ In retail weight. Coefficient to transform carcass weight into retail weight is 0.78 for pigmeat.

Table 5.21 EU-28 poultry meat market balance (1000 t carcass weight equivalent)

	EU-28						% variation				
	2013	2014	2015	2016e	2017f	2018f	14/13	15/14	16/15	17/16	18/17
Gross Indigenous Production	12 792	13 270	13 788	14 396	14 636	14 748	3.7	3.9	4.4	1.7	0.8
Live Imports	1	1	1	2	1	1					
Live Exports	10	11	10	10	9	9	5.7	-3.3	-7.6	-10.0	0.0
Net Production	12 783	13 261	13 779	14 388	14 628	14 741	3.7	3.9	4.4	1.7	0.8
<i>EU-15</i>	9 829	10 082	10 303	10 593	10 754	10 771	2.6	2.2	2.8	1.5	0.2
<i>EU-N13</i>	2 954	3 178	3 477	3 795	3 875	3 971	7.6	9.4	9.2	2.1	2.5
Meat Imports	791	821	855	881	881	898	3.8	4.1	3.0	0.0	2.0
Meat Exports	1 304	1 353	1 365	1 478	1 492	1 528	3.7	0.9	8.3	1.0	2.4
Consumption	12 270	12 729	13 269	13 791	14 017	14 111	3.7	4.2	3.9	1.6	0.7
Per Capita Consumption¹ (kg)	21.3	22.1	22.9	23.8	24.1	24.2	3.4	3.9	3.6	1.3	0.4
<i>Share in total meat cons. (%)</i>	29.9	30.3	30.7	31.6	31.9	32.0					
Self-sufficiency rate (%)	104	104	104	104	104	105					

¹ In retail weight. Coefficient to transform carcass weight into retail weight is 0.88 for poultry meat.

Table 5.22 EU-28 sheep and goat meat market balance (1000 t carcass weight equivalent)

	EU-28						% variation				
	2013	2014	2015	2016e	2017f	2018f	14/13	15/14	16/15	17/16	18/17
Gross Indigenous Production	902	901	925	959	977	989	-0.1	2.7	3.6	1.9	1.2
Live Imports	0	0	0	0	0	0					
Live Exports	34	36	38	52	52	52	7.7	3.7	38.3	-1.0	0.0
Net Production	868	864	888	907	926	937	-0.4	2.7	2.1	2.1	1.3
<i>of which on-farm slaughterings</i>	108	112	119	148	146	146	3.7	6.6	23.7	-1.0	0.0
<i>EU-15</i>	787	780	805	786	800	808	-0.9	3.2	-2.4	1.8	1.0
<i>EU-N13</i>	81	84	83	121	125	129	4.4	-2.1	46.1	4.0	3.0
Meat Imports	200	189	202	203	179	197	-5.6	7.3	0.3	-12.0	10.0
Meat Exports	36	32	20	19	30	32	-11.8	-38.1	-5.3	60.0	5.0
Consumption	1 031	1 021	1 070	1 091	1 074	1 102	-1.0	4.8	1.9	-1.5	2.6
Per Capita Consumption¹ (kg)	1.8	1.8	1.8	1.9	1.8	1.9	-1.3	4.5	1.6	-1.8	2.3
<i>Share in total meat cons. (%)</i>	2.5	2.4	2.5	2.5	2.4	2.5					
Self-sufficiency rate (%)	87	88	86	88	91	90					

¹ In retail weight. Coefficient to transform carcass weight into retail weight is 0.88 for sheep and goat meat.