The 2016 EU Agricultural Outlook Conference

MEAT

Brussels, 6-7 December
Outlook for EU meat markets

DOMESTIC DEMAND

INTERNATIONAL DEMAND

EU SUPPLY
Changes in per capita meat consumption

Source: DG Agriculture and Rural Development (final baseline), based on OECD-FAO Agricultural Outlook 2016-2025
Meat types in EU consumer basket (kg/capita)

Note: consumption in retail weight
Steady growth in world meat consumption

Main drivers:

• population and income growth
• convenience and price
• religious guidelines
• social and environmental concerns, ...

Outlook:

• +1.3% per year in world consumption
• +2.0% per year in world imports

Change in world imports of meat products and live animals 2026 vs. 2016 (million tonnes carcass weight)

Source: DG Agriculture and Rural Development (final baseline), based on OECD-FAO Agricultural Outlook 2016-2025
### Changes in EU production and exports (2026 vs 2016, '000 t)

<table>
<thead>
<tr>
<th>Category</th>
<th>Gross Production Change</th>
<th>Exports Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poultry meat</td>
<td>5%</td>
<td>-7.5%</td>
</tr>
<tr>
<td>Beef &amp; veal</td>
<td>-14%</td>
<td>1%</td>
</tr>
<tr>
<td>Pigmeat</td>
<td>2.4%</td>
<td>3%</td>
</tr>
<tr>
<td>Sheep &amp; goat meat</td>
<td>-19%</td>
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**Note:** The production of beef&veal and sheep&goat includes the net trade of live animals.

- **Growing EU demand**: Exports of wings, legs and offal; competing world market
- **Decline in EU demand**: Decrease in cow herd
- **Decline in demand from Mediterranean region**: Niche export markets
- **Slight increase in EU demand**: Environmental concerns
- **China effect will disappear**: Lack of competitiveness

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**Changes in EU production and exports**

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**Note:** The production of beef&veal and sheep&goat includes the net trade of live animals.
EU production goes to EU market

- **Beef**: 7.5 million t, 94% domestic, 6% exports
- **Pigmeat**: 24 million t, 88% domestic, 12% exports
- **Poultry**: 15 million t, 89% domestic, 11% exports
- **Sheep & goat**: 1 million t, 95% domestic, 5% exports
Environmental aspects of EU meat production

Total GHG emissions from meat in 2025 vs. 2008 (million t CO2-eq.)

Source: JRC, 2016 CAPRI baseline
Main drivers:

- EU dairy market
- EU consumption
- World market price

Note: price projections in nominal terms

Source: DG Agriculture and Rural Development (final baseline) and OECD-FAO Outlook 2016-2025
World pigmeat prices (EUR/t)

Main drivers:
- EU sow herd
- EU consumption
- World pork price

Note: price projections in nominal terms
Source: DG Agriculture and Rural Development (final baseline) and OECD-FAO Outlook 2016-2025
Take away messages

Meat consumption: EU-15= stable; EU-N13= catching up
Different pattern by meat type

Increasing world meat demand, especially for poultry and beef

Minor increase in EU meat production (200 000 tonnes by 2026, compared to high 2016 level)
88-95% of production to EU consumer
EU prospects report and data available at:

OECD-FAO Outlook at:
http://www.agri-outlook.org/

Short term outlook at:

Ecampa at:

Thanks