



# SHEEP AND GOAT MEAT

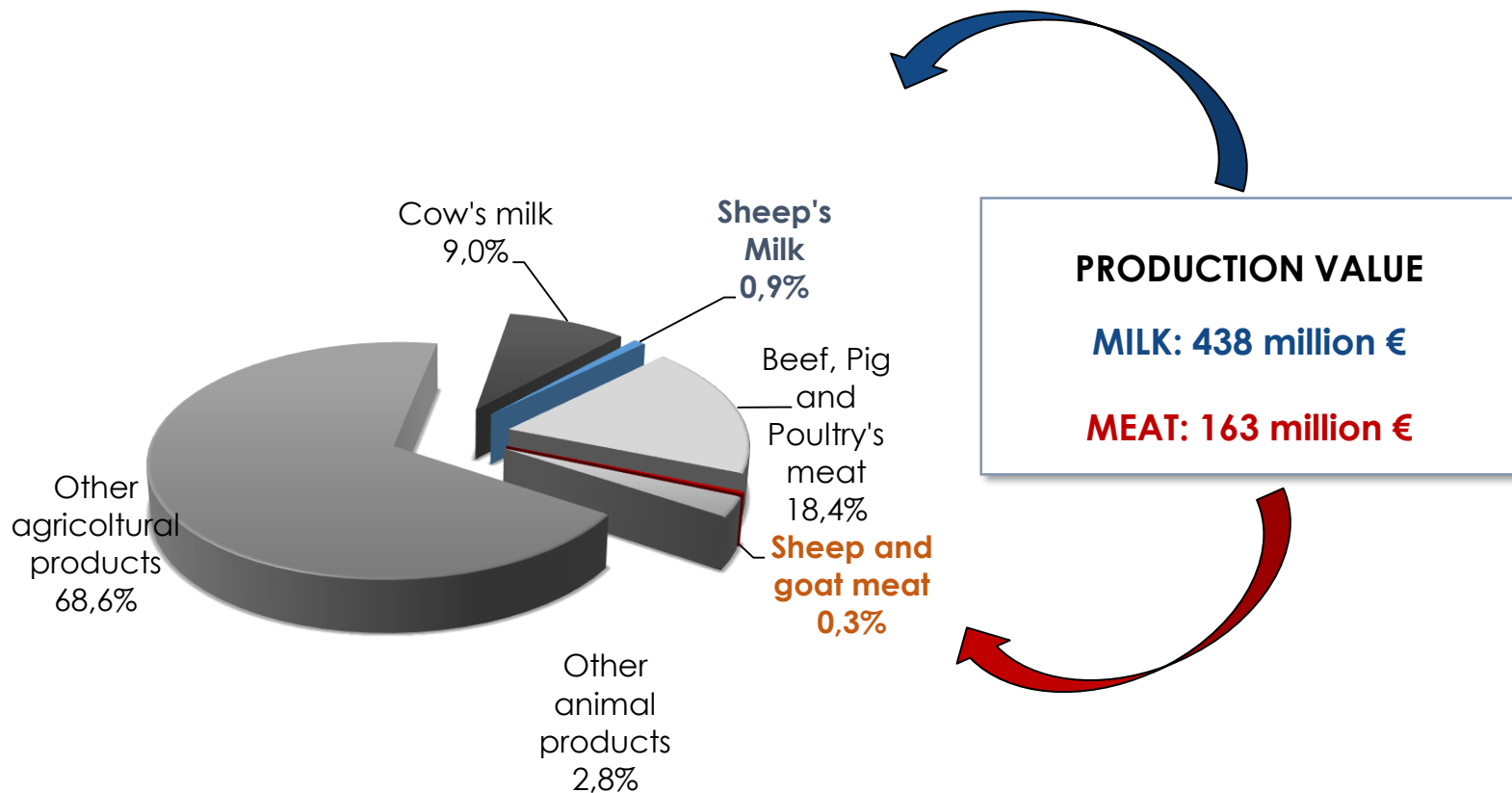
ITALY: NATIONAL MARKET SITUATION

Giugno 2018

# SECTOR SIZE AND VALUE

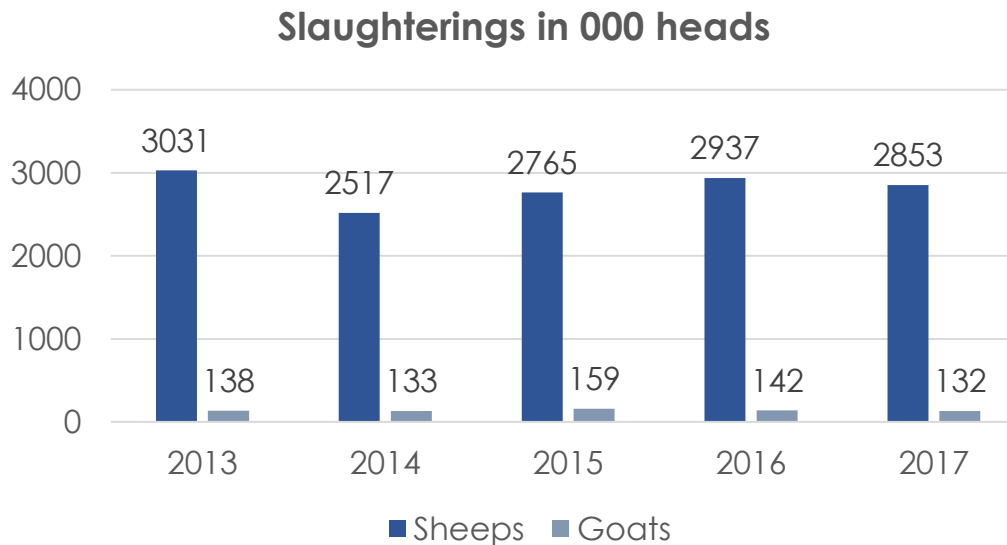
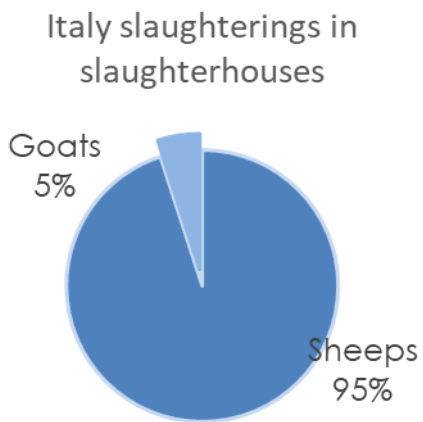
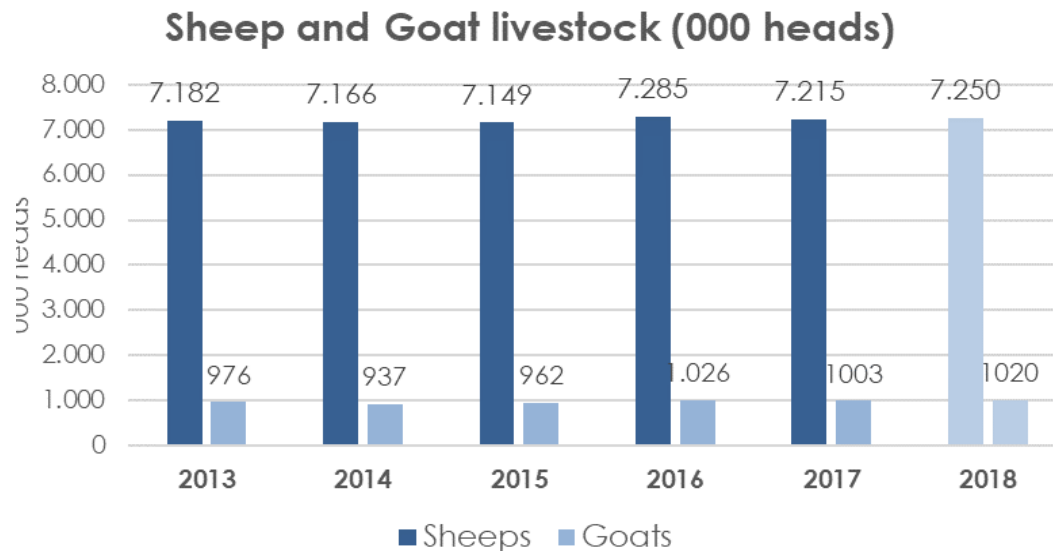
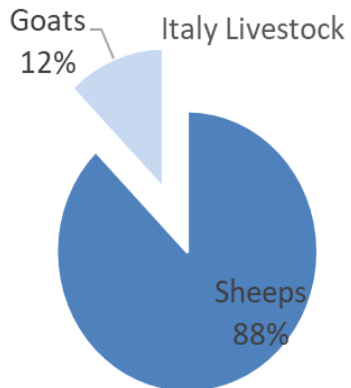


## WEIGHT ON NATIONAL AGRICULTURAL SECTOR (2017)



Source: ISMEA calculations on ISTAT data

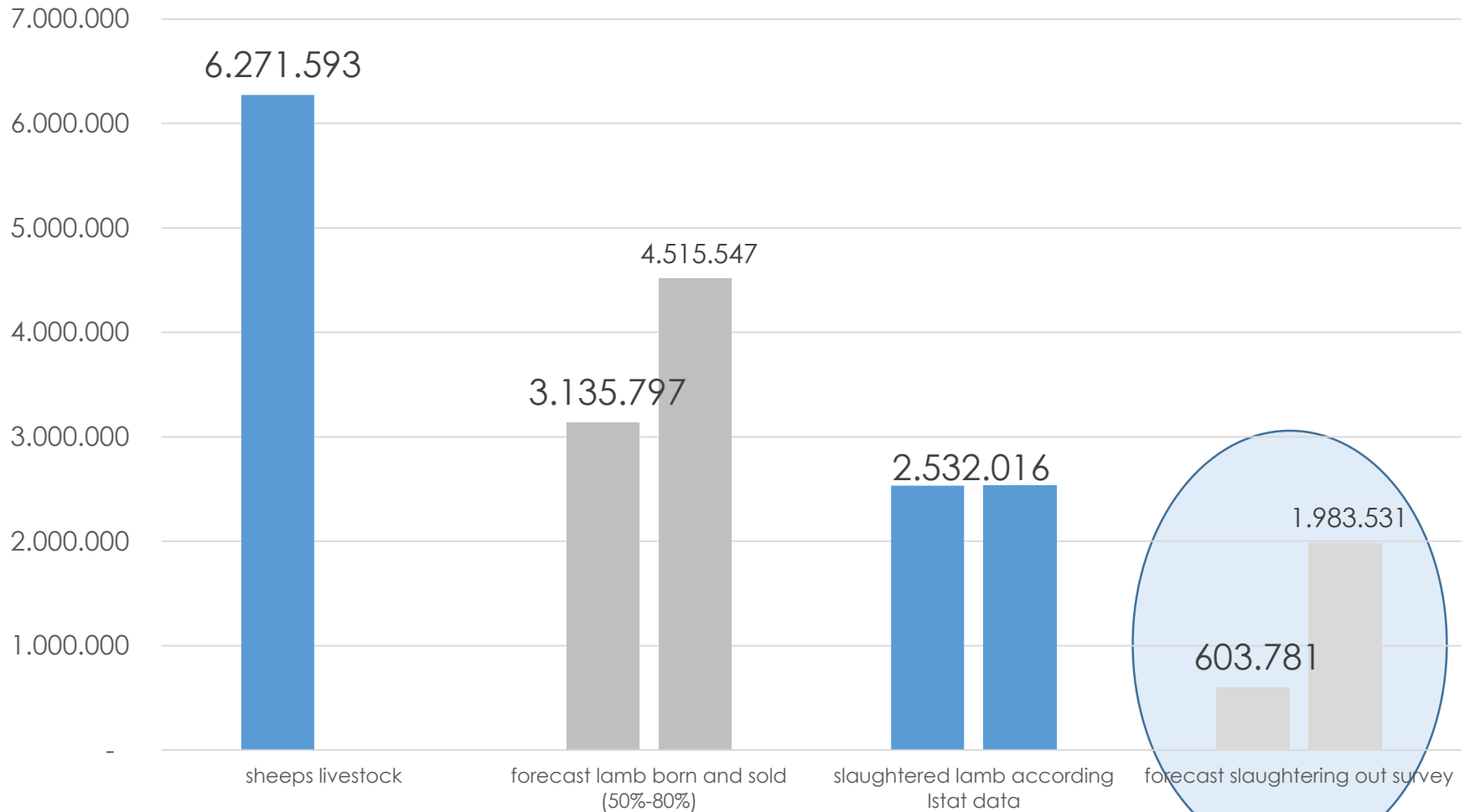
# ITALY: SUPPLY



# SLAUGHTERINGS



Estimated slaughtering out survey



# SLAUGHTERINGS – MEAT PRODUCTION



## Sheep and goat slaughtering (tons - cwe)

	2015	2016	2017	Var%2017/16	Share	2018
Sheep, of which:	<b>33.632</b>	<b>31.308</b>	<b>33.251</b>	<b>6%</b>	<b>95%</b>	
- Light lamb	18.721	18.618	20.591	11%	62%	0,5%
- Heavy lamb	4.430	3.350	3.415	2%	10%	1%
- Sheep	10.481	9.340	9.231	-1%	28%	0%
<b>Goats, of which:</b>	<b>1.808</b>	<b>1.616</b>	<b>1.775</b>	<b>10%</b>	<b>5%</b>	
- Goats kids	1.356	993	965,7	-3%	54%	-3%
- Goats and bucks	453	623	808,9	30%	46%	0%
<b>Sheep and Goats</b>	<b>35.440</b>	<b>32.924</b>	<b>35.026</b>	<b>6%</b>	<b>100%</b>	

Fonte: ISTAT

## 3 PGI for lamb meat



- Agnello di Sardegna
- Abbacchio Romano
- Agnello del Centro Italia

Certified production  
value  
58 Million €

30%

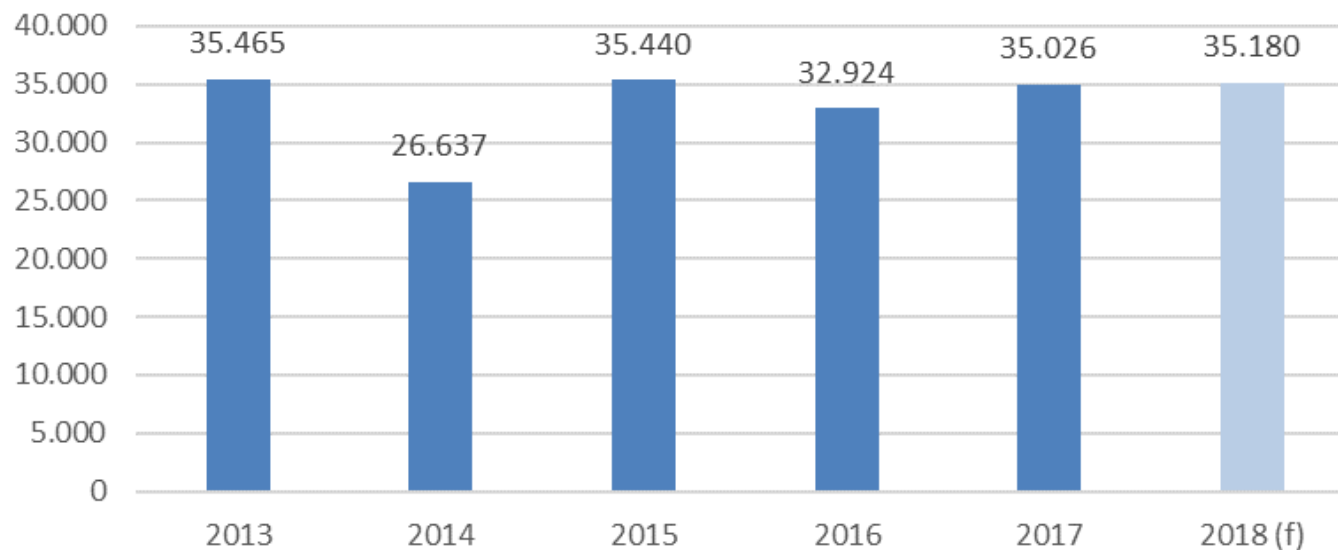
Certified production  
volume  
6.039 tons

17%

# SLAUGHTERING FORECASTS



sheeps and goat's slaughterings (Cwe)

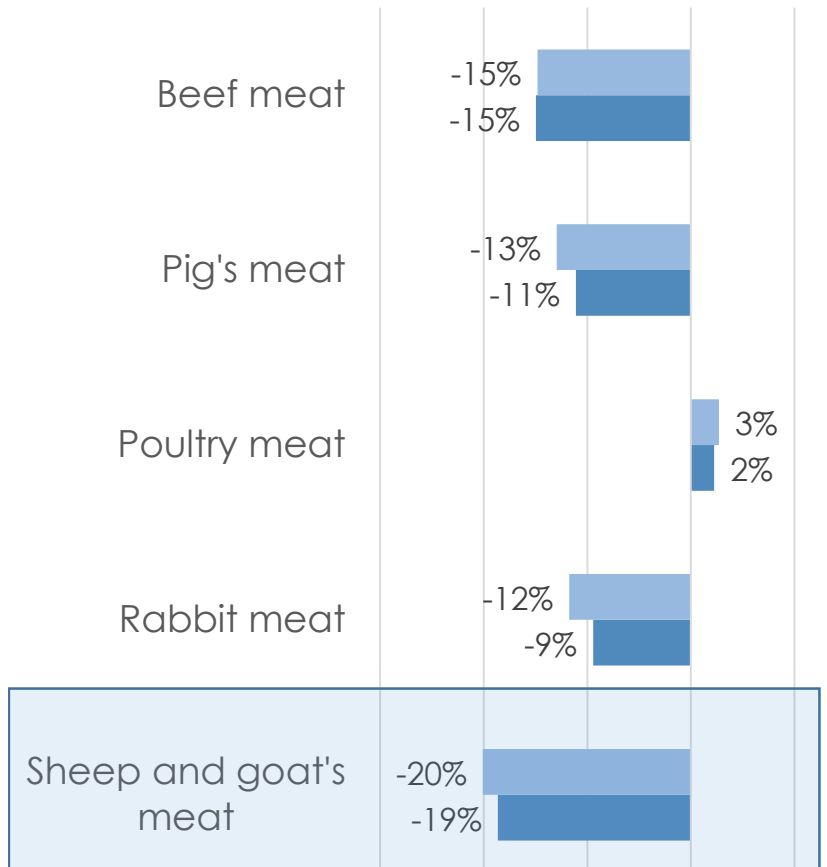


Less goat kids  
Less Sheeps  
More Lamb  
(more heavy)

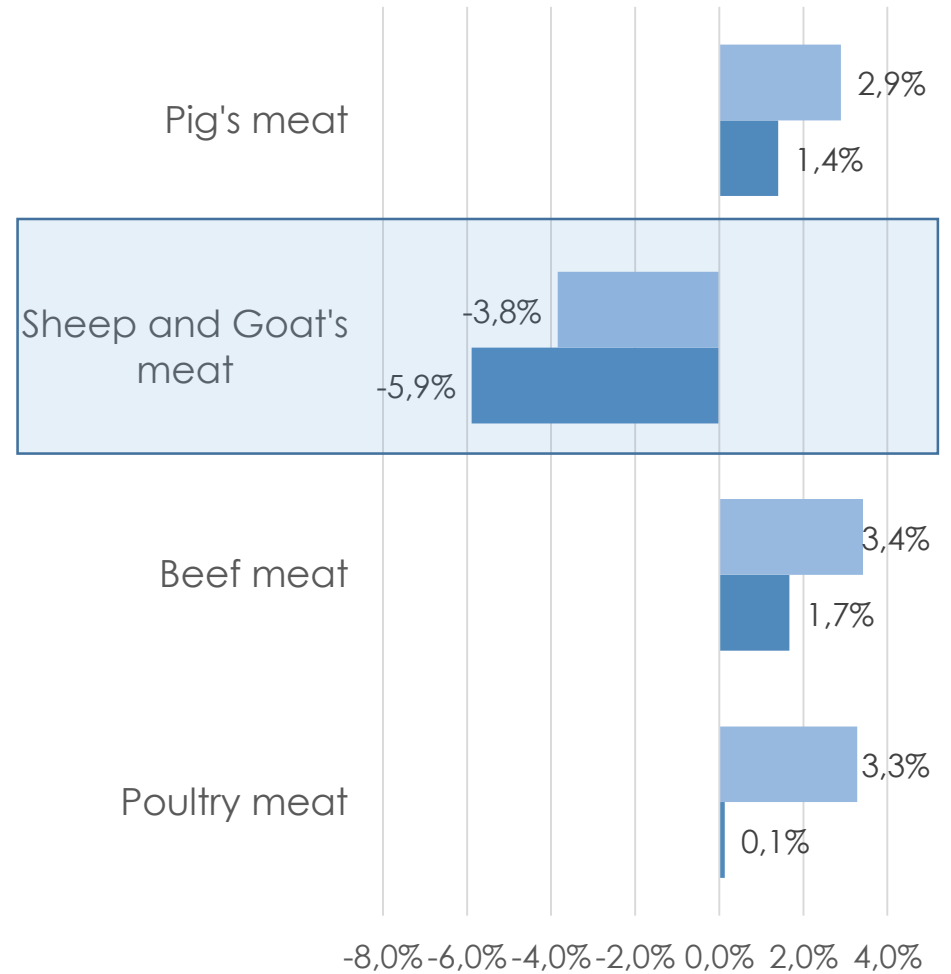
# MEAT CONSUMPTION IN LAST 5 YEARS



## 2016 vs 2012



## 17 vs 16



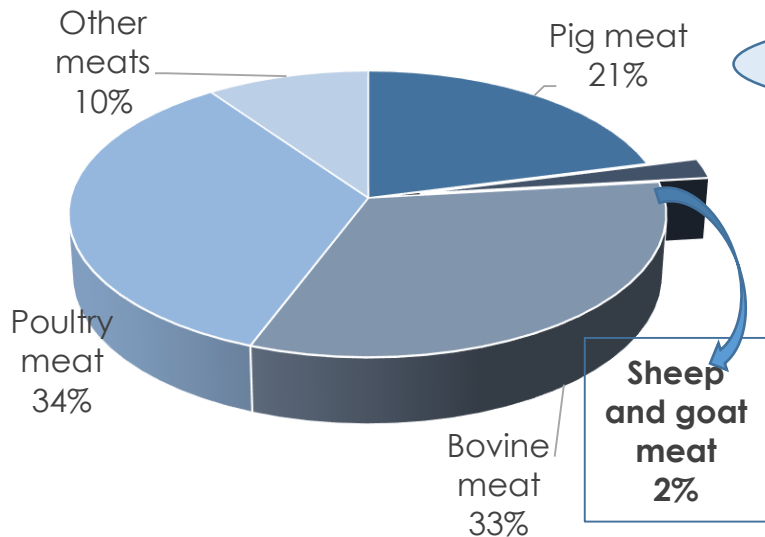
■ var.% value ■ var.% volume

■ Var.% in value ■ Var.% in volume

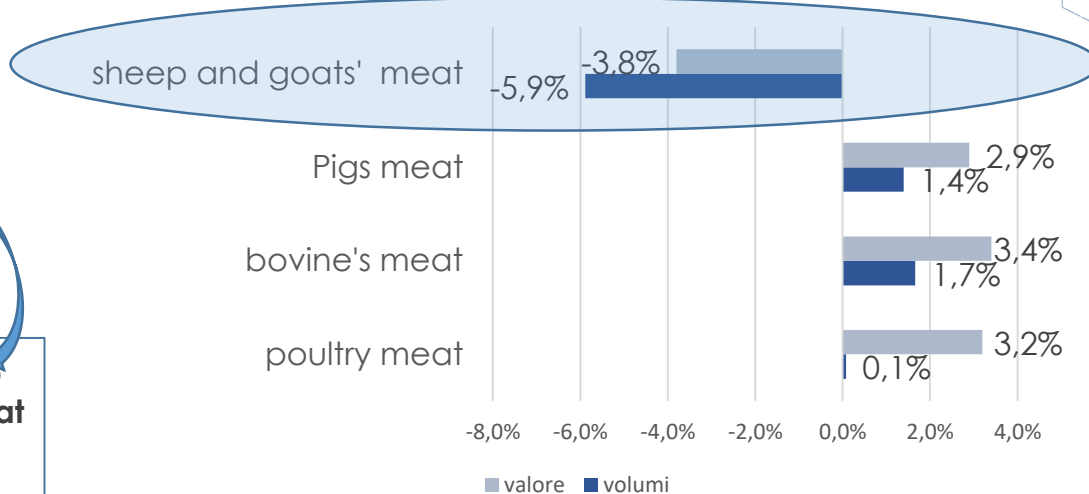
# DOMESTIC CONSUMPTION IN 2018



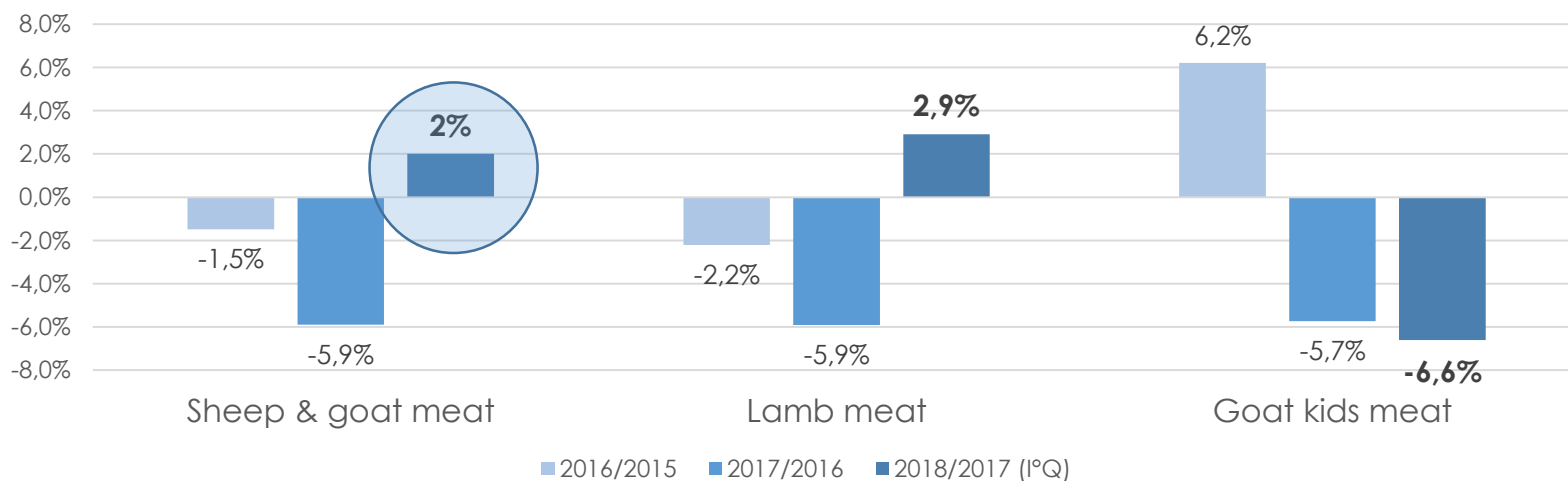
## Meat consumption (share 2017)



## Domestic consumption 2017/2016

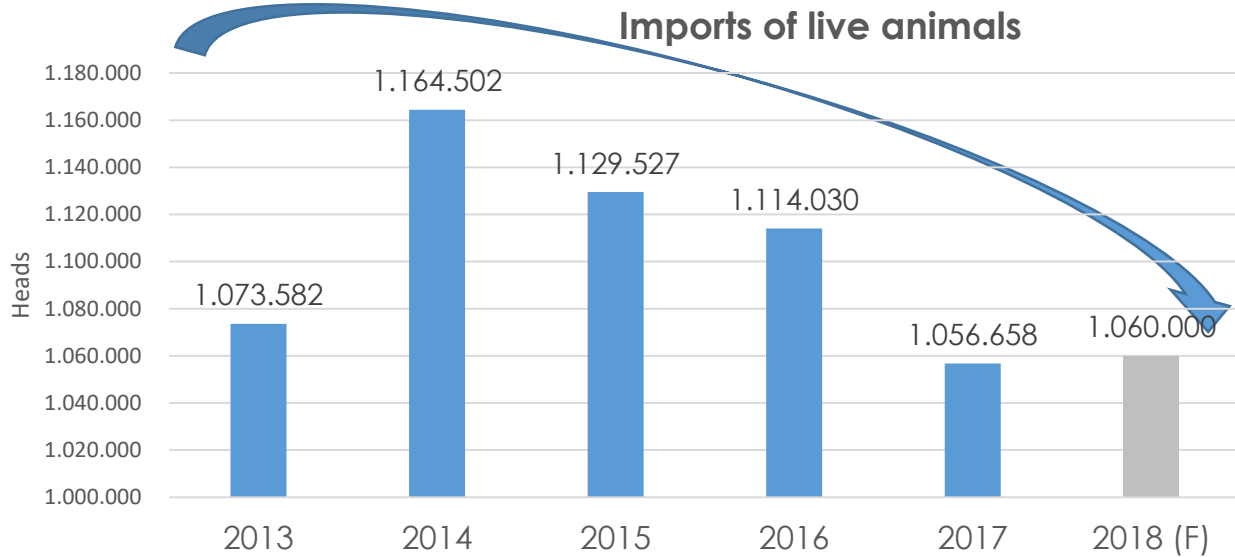


## Household consumption 2018



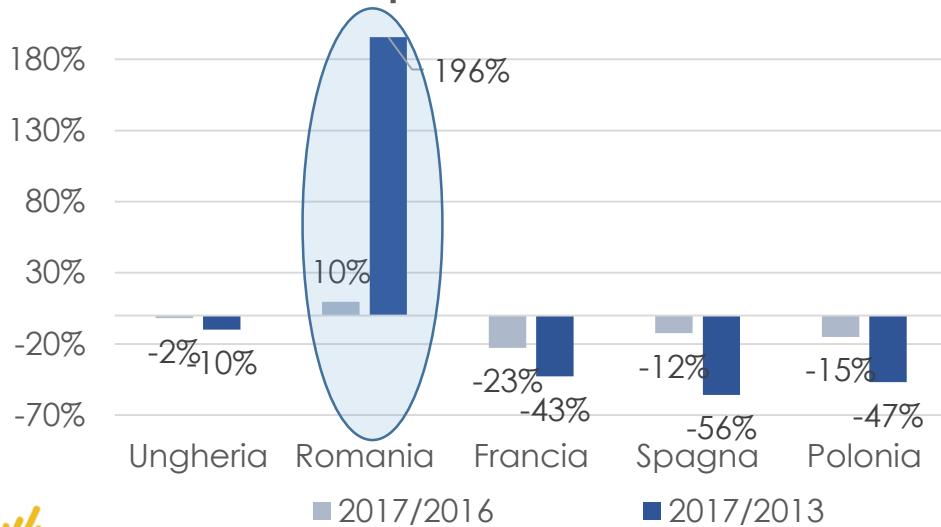


# SHEEP AND GOAT IMPORTS LIVE ANIMALS

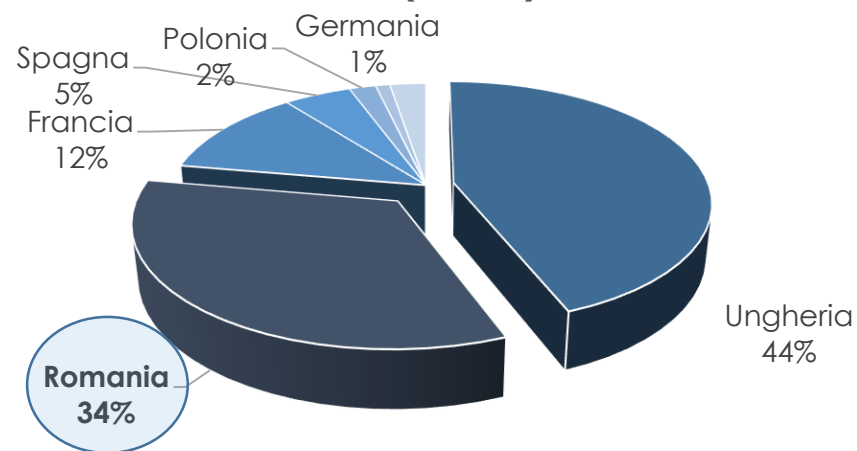


**-2% between 2013 and 2017**  
**-5% 2017/2016**

### Trend of imports of live animals



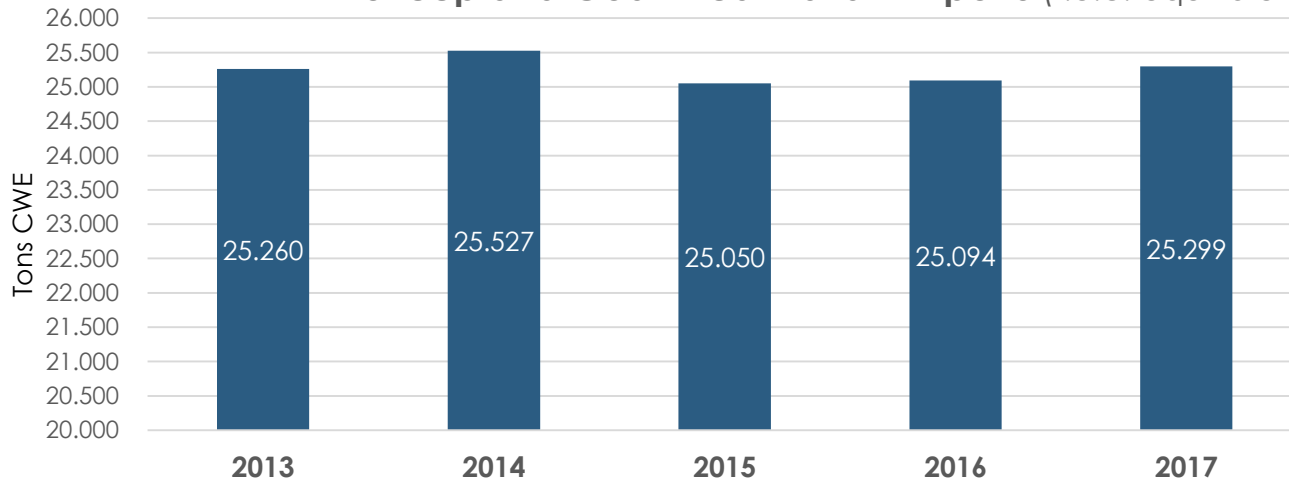
### Main live animals provider countries - 2017 (Heads)



# MEAT IMPORT (2013-2017)

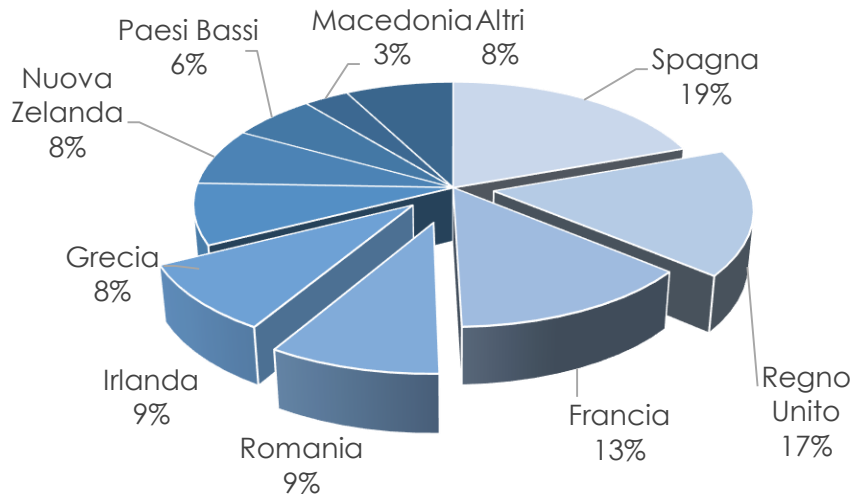


Sheep and Goat meat Italian imports (t.e.c. equivalent)

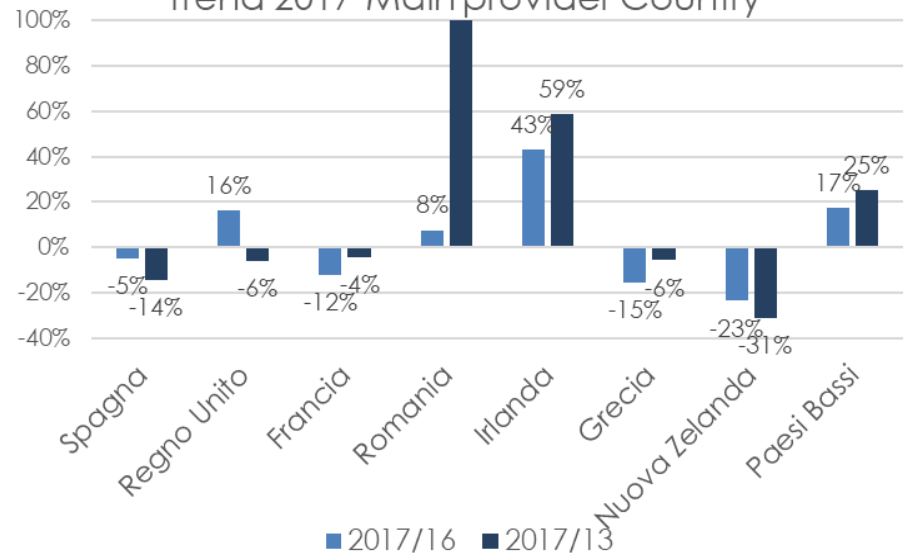


**+0,8%**  
2017/2016  
**+0,2%**  
2017/2013

Main meat provider countries 2017



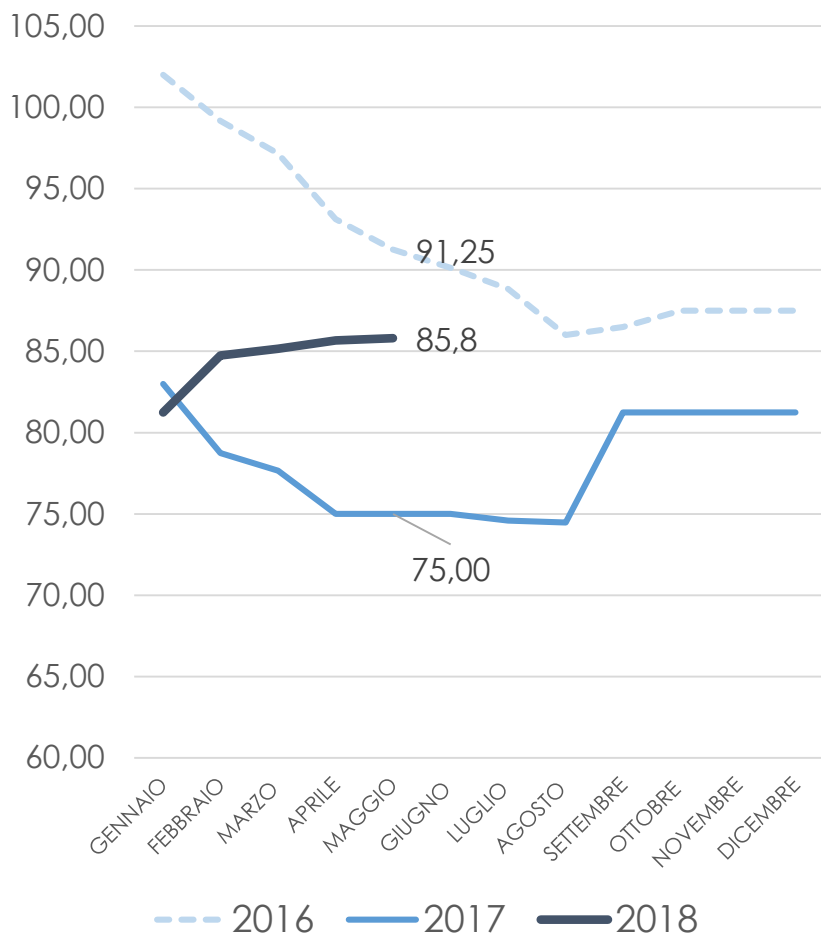
Trend 2017 Main provider Country



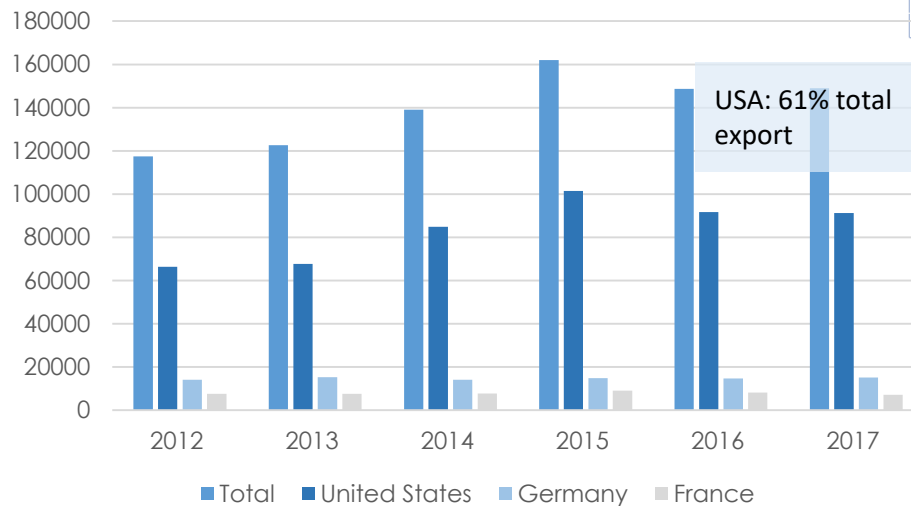
# SHEEP'S MILK MARKET



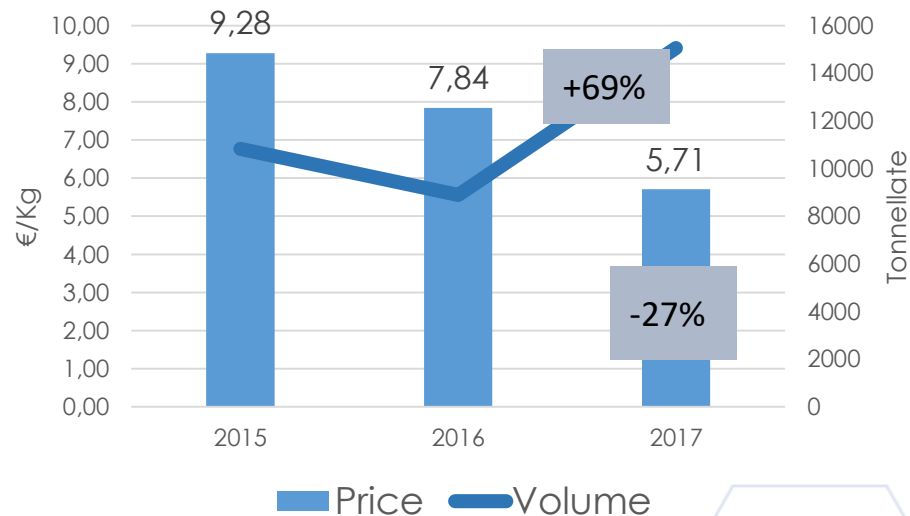
## Sheep milk price



## Sheep milk cheese exports (value 000 €)



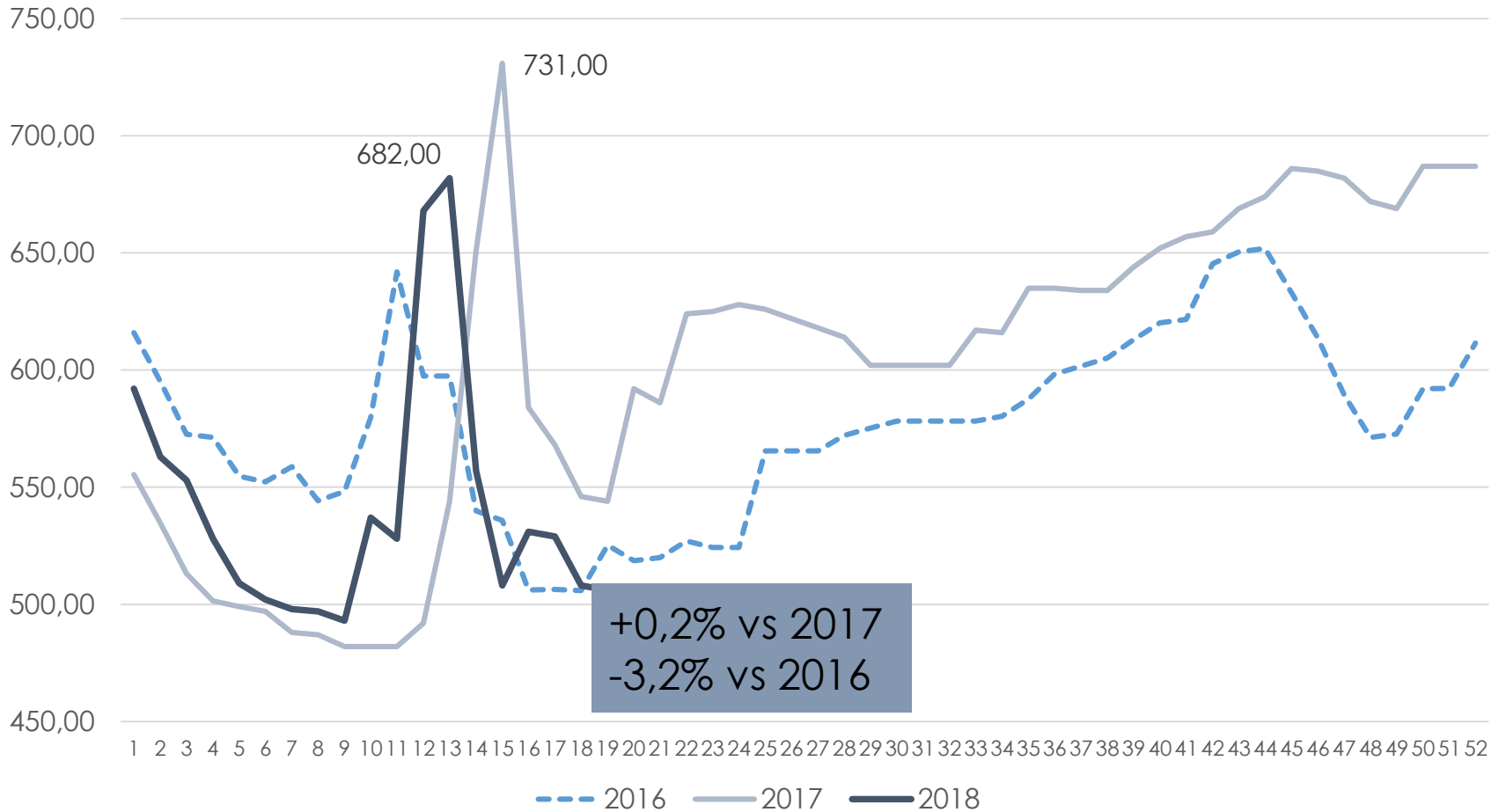
## USA Imports of sheep milk cheese



# ITALY: PRICES



Light lamb prices (€/100Kg cwe)



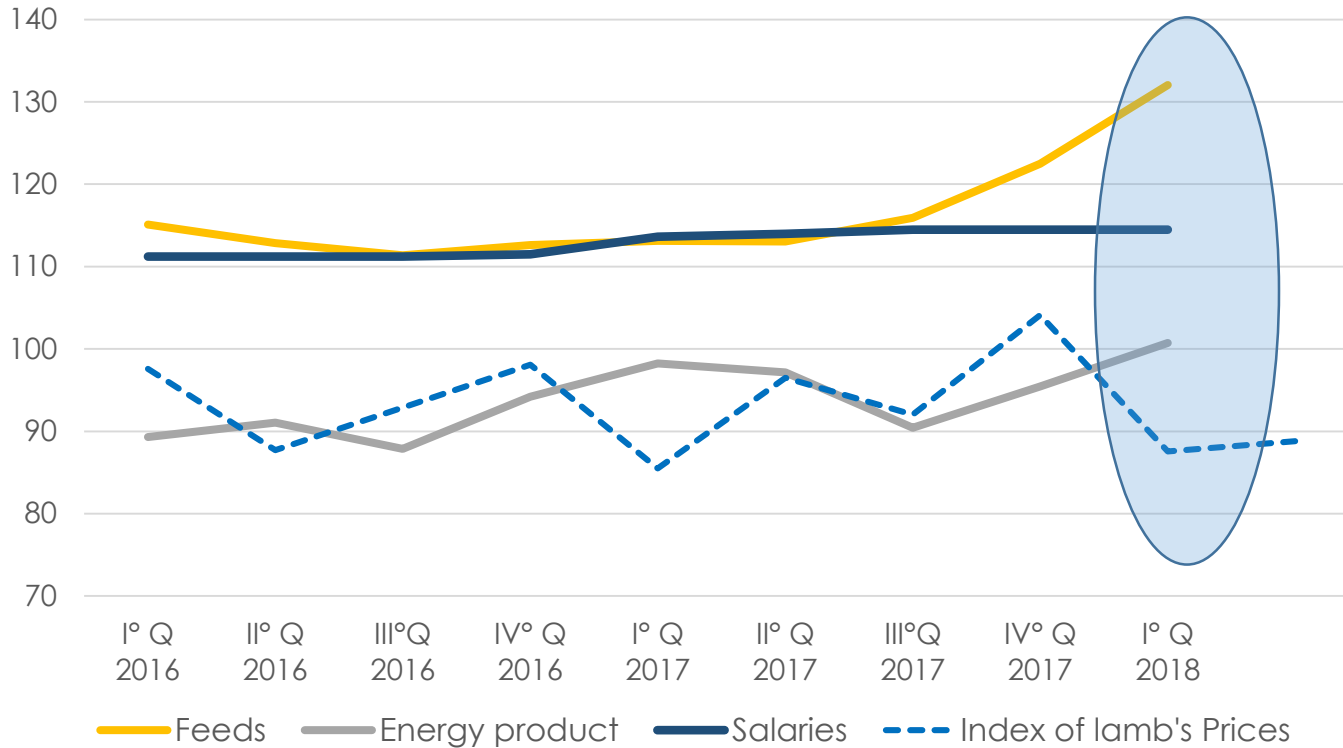
+0,2% vs 2017  
-3,2% vs 2016

Medium price in weeks 1-21  
2017: 538 €/100Kg  
2018: 539 €/100Kg

# PRODUCTION COSTS



## ISMEA INDEX FOR PRODUCTION MEANS PRICES



Variation 2018/2017 (I° Q): Production means prices index for sheep and goat sector: +7,5%

**Feed: +8,2%**

**Energy products: +2,5%**

**Salaries: +0,8%**

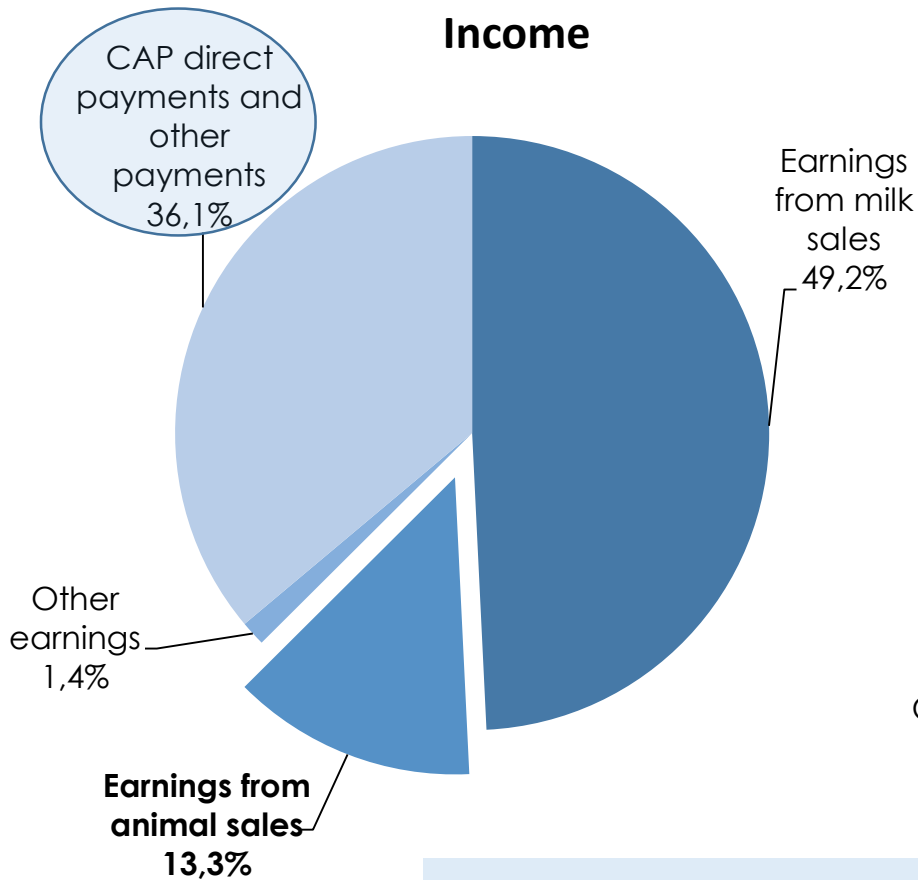
Index of Lamb price 2018/2017 (I°Q): +2,5%

# FARMERS BALANCESHEET

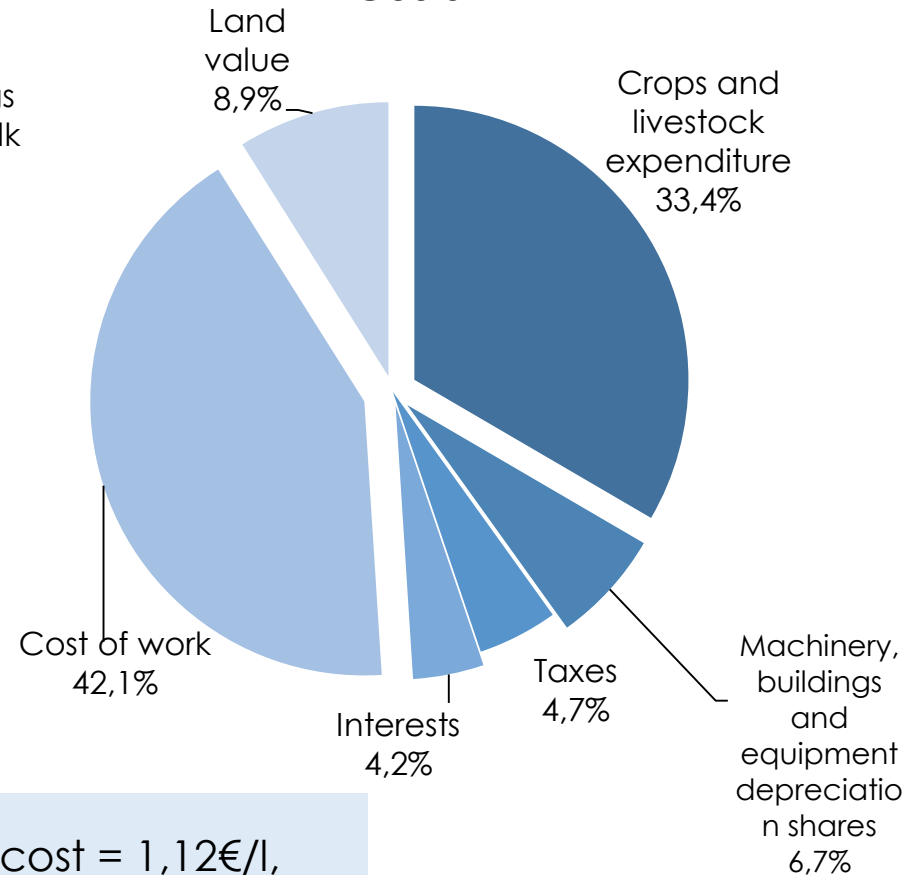


## SURVEY IN MEDIUM-SIZED FARMS RESULTS (50/385 HEADS)

### Income



### Costs



2017: Milk production cost = 1,12€/l,  
Milk medium price = 0,80/0,90 €/l



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