European Commission

SHEEP / GOAT FORECAST GROUP
Market Situation for Sheep & Goats
23 October 2017

Agriculture and Rural Development

European Commission

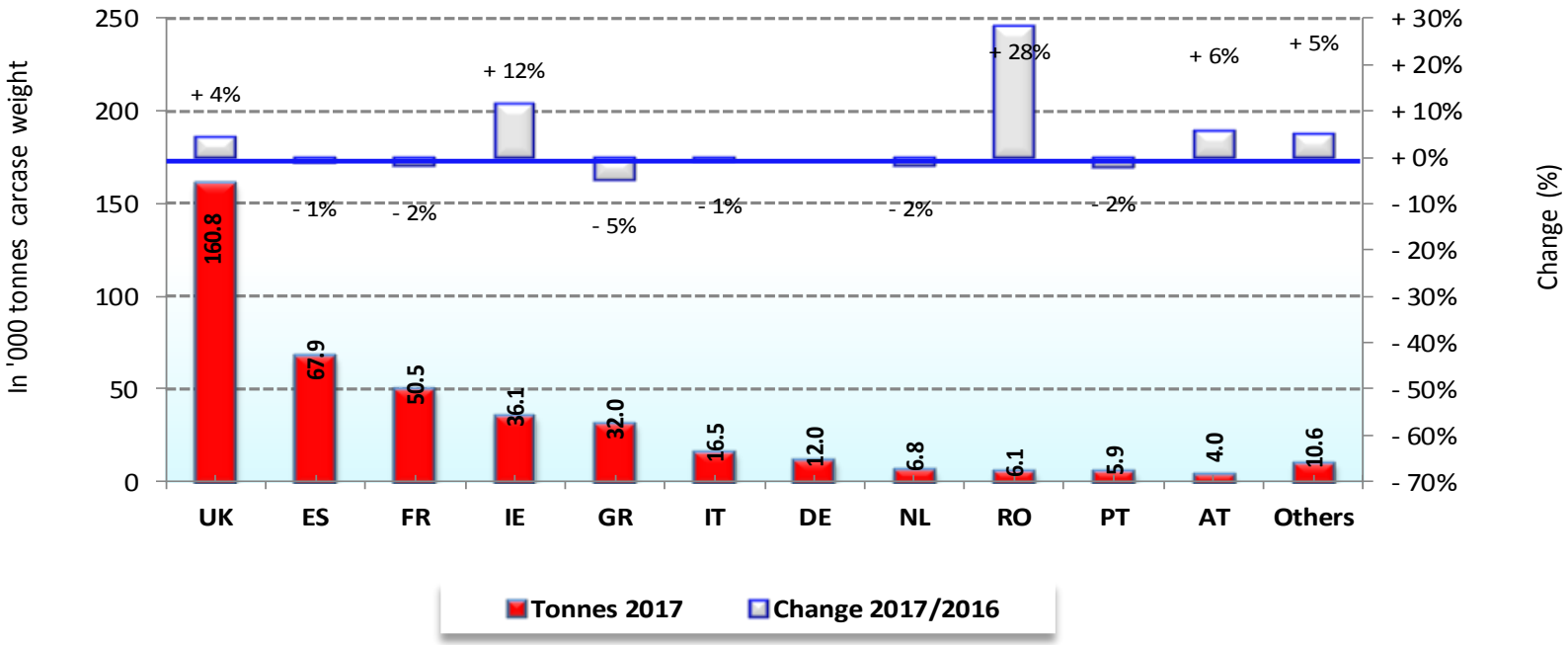
Production

Agriculture and Rural Development

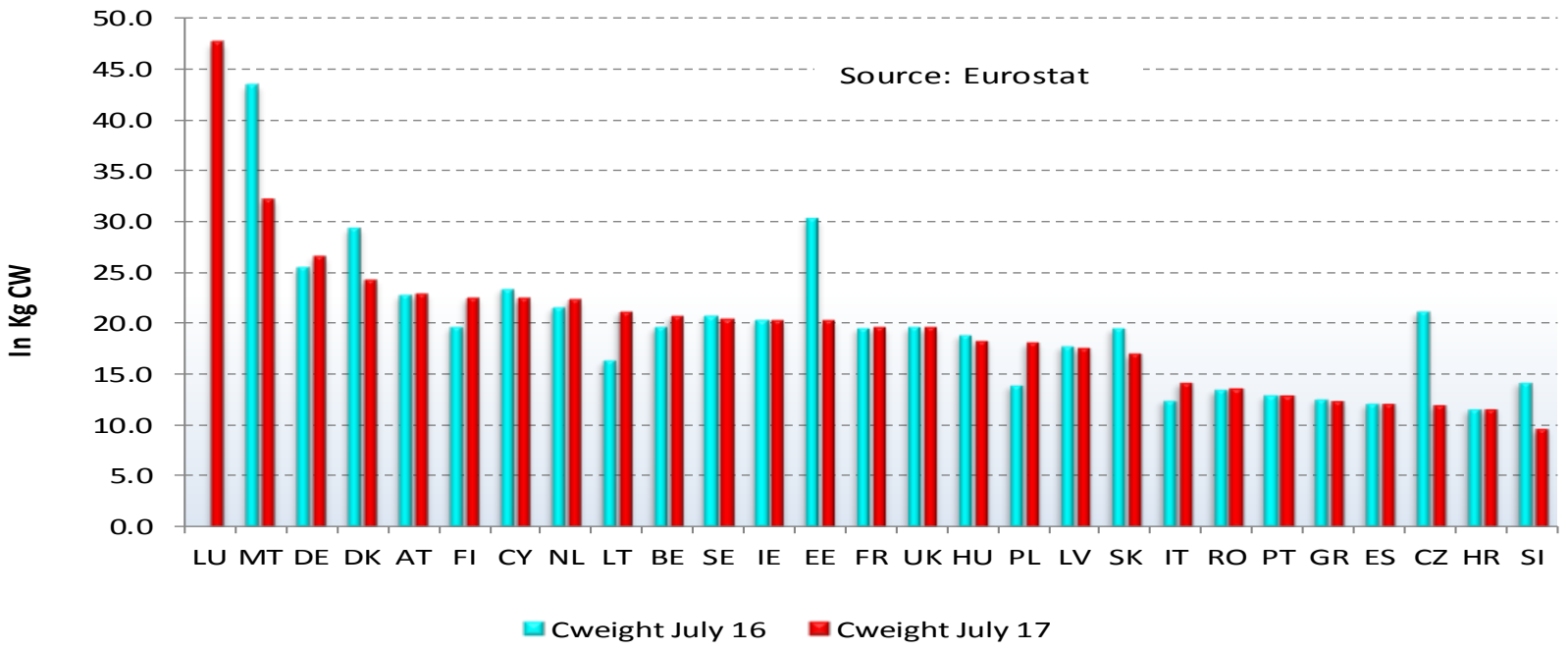
PRODUCTION

European Commission

Sheep slaughtering for EU main producers (up to July)

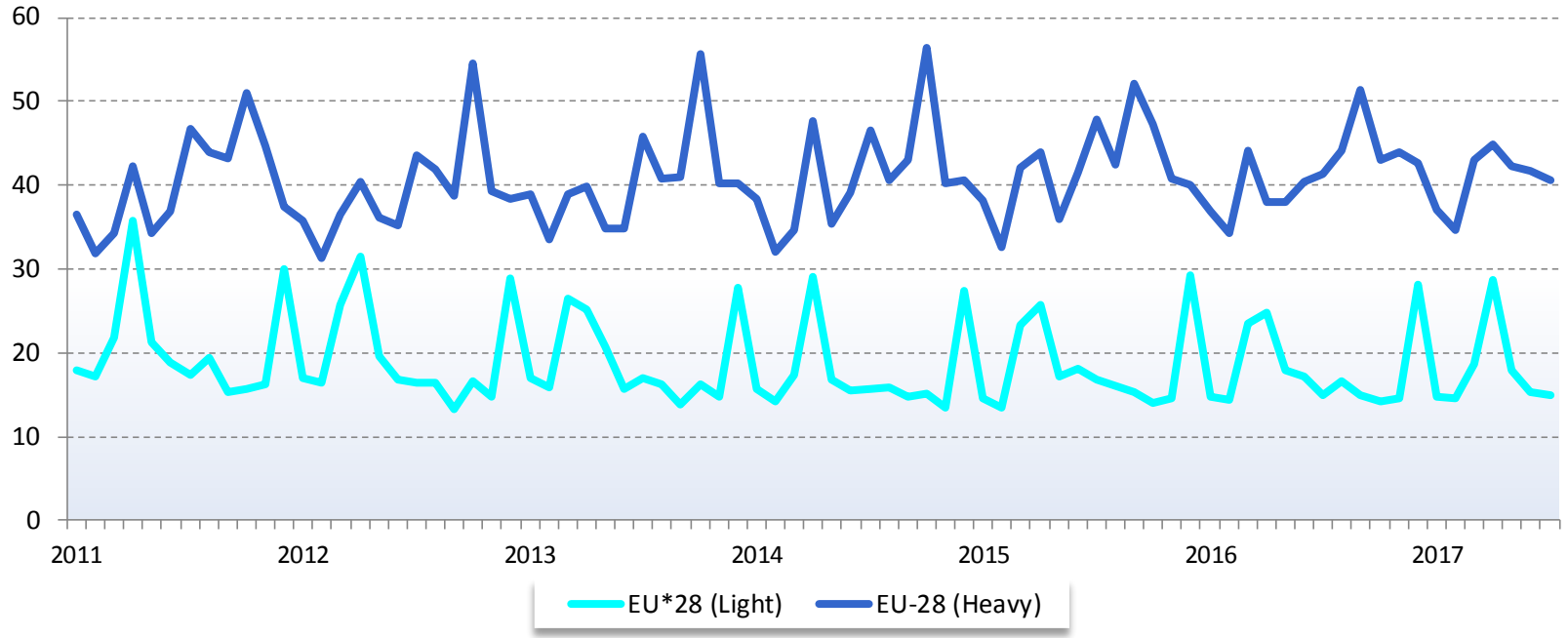


Evolution sheep average carcass weight per MS (July 17 versus July 16)



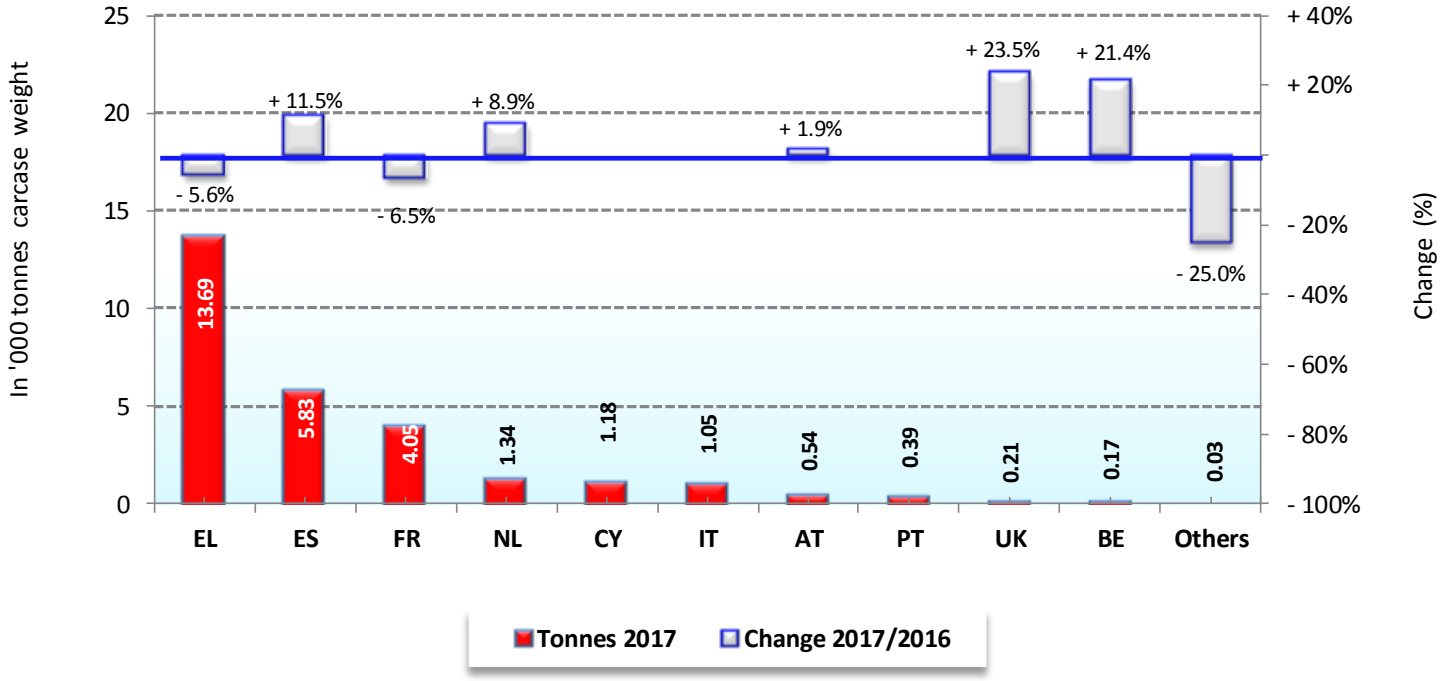
European Commission

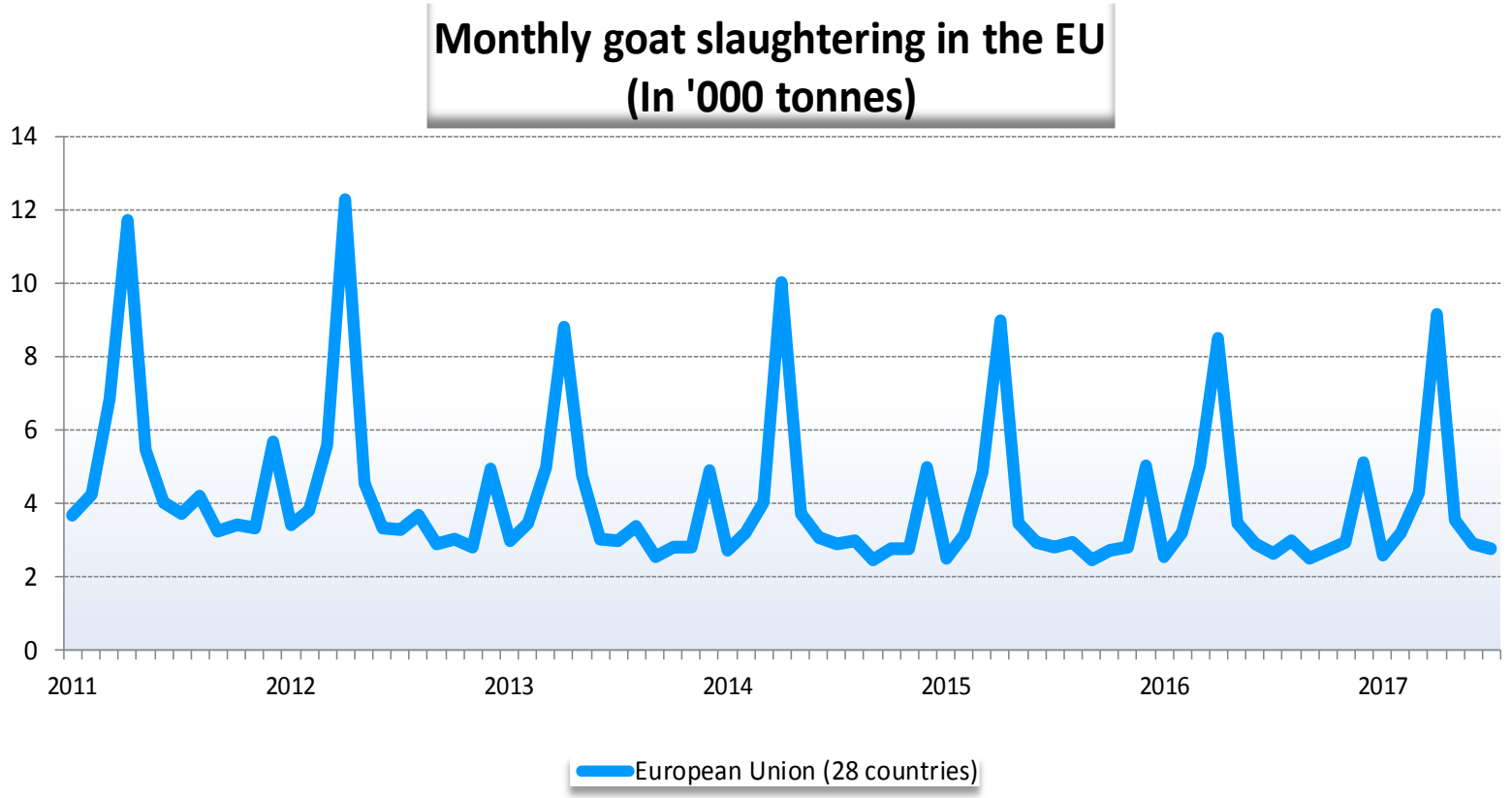
Monthly sheep slaughtering in the EU (In '000 tonnes)



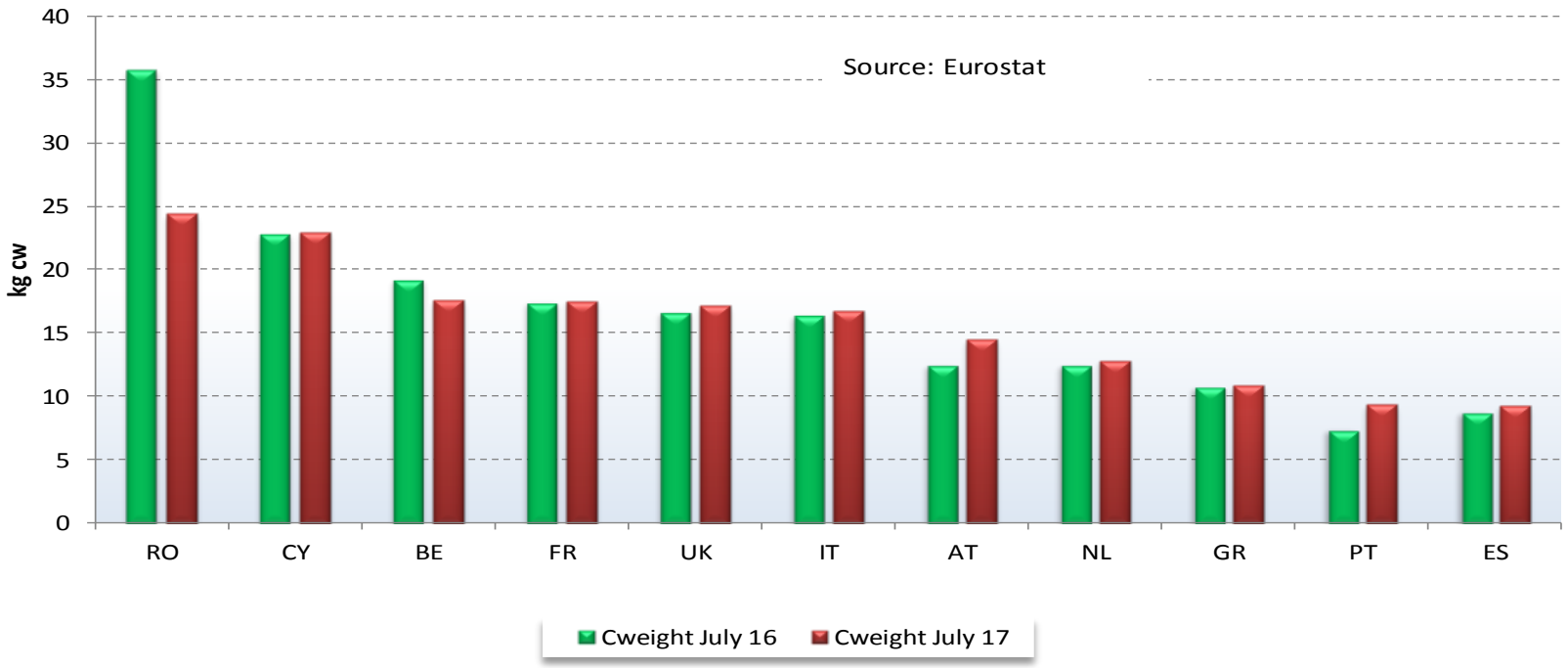
European Commission

Goat slaughtering for EU main producers (up to July)




Monthly goat slaughtering in the EU
(In '000 tonnes)
14
12
10
8
6
4
2
0
2011
2012
2013
2014
2015
2016
2017
European Union (28 countries)

Evolution goat average carcass weight per MS
(July 17 versus July 16)



European Commission

Prices

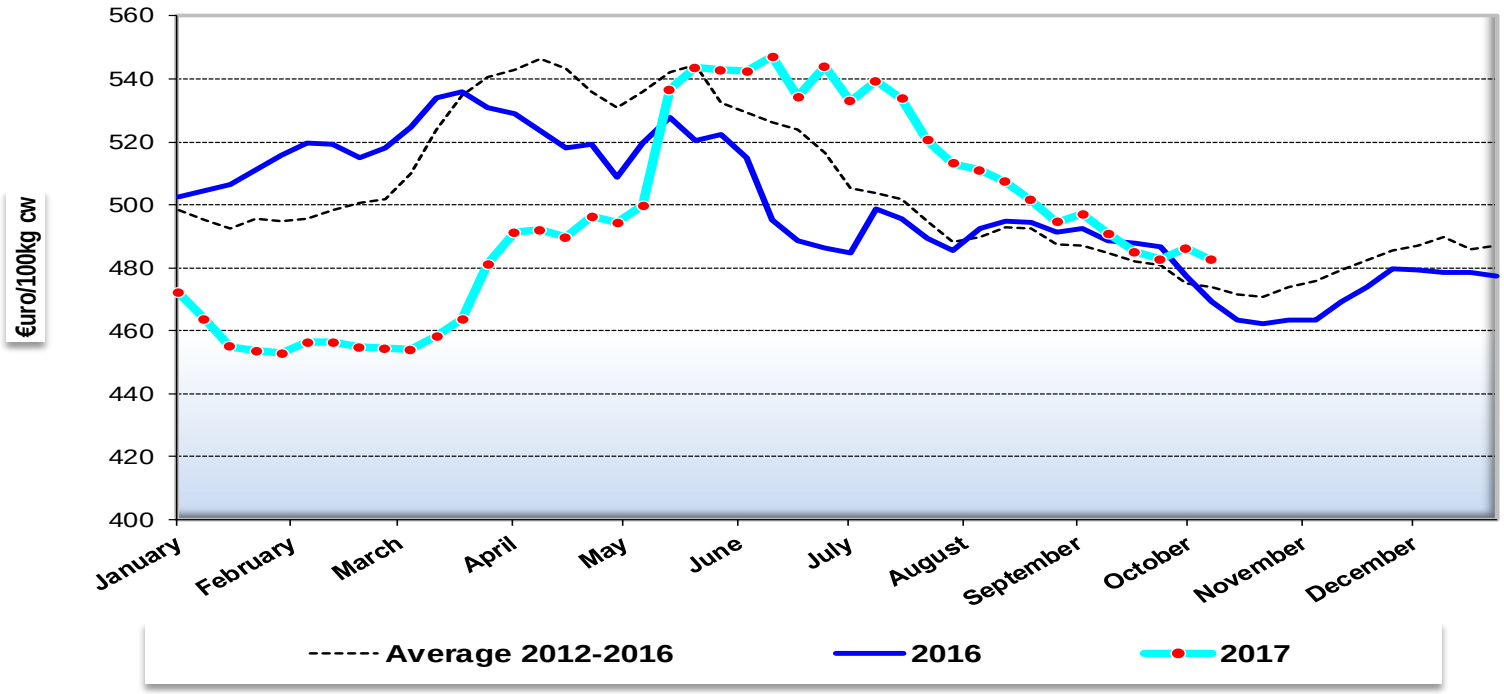
Agriculture and Rural Development

SHEEP PRICES EU EVOLUTION

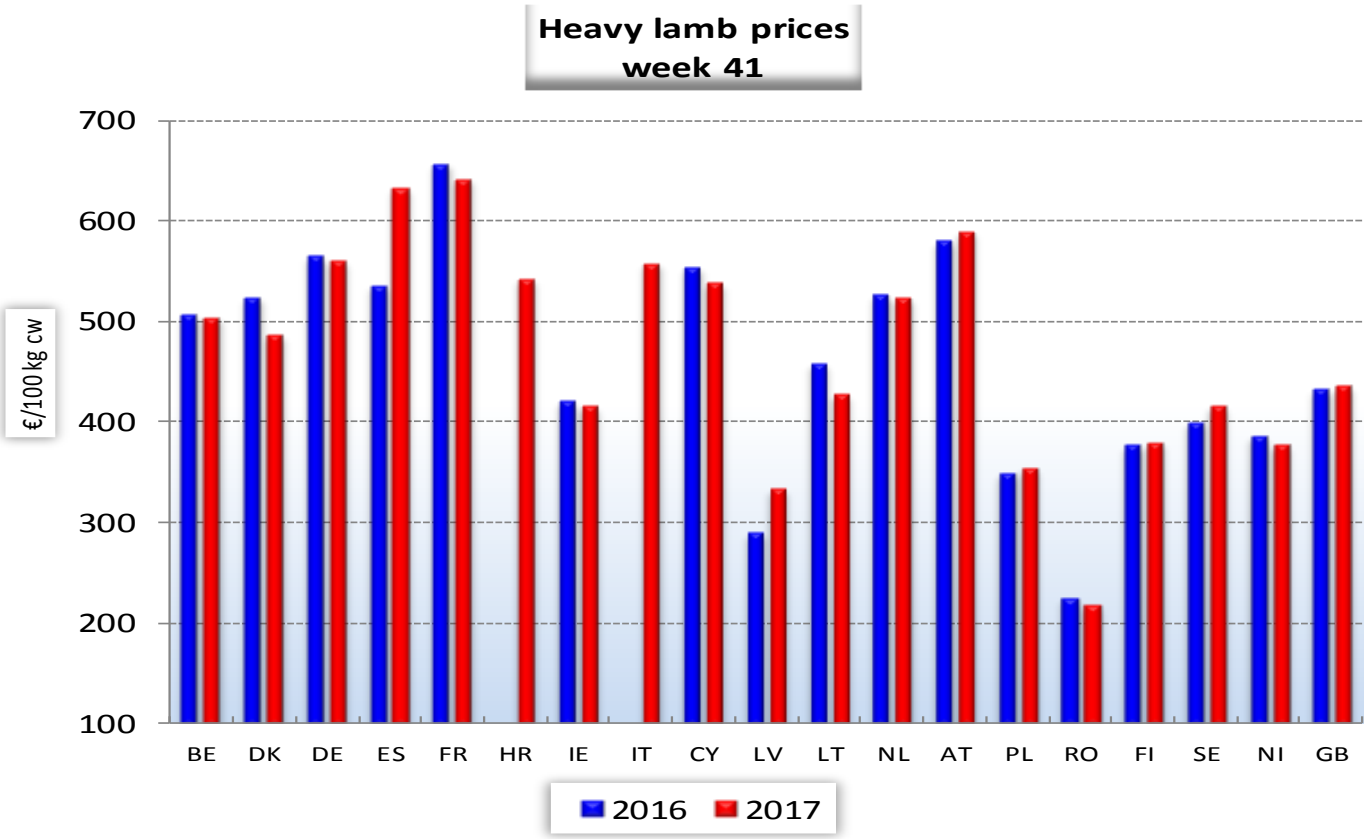
European Commission

Evolution heavy lamb prices in the EU

Latest price ==> 482.40 EUR/100 kg



SHEEP PRICES EU EVOLUTION



SHEEP PRICES EU EVOLUTION

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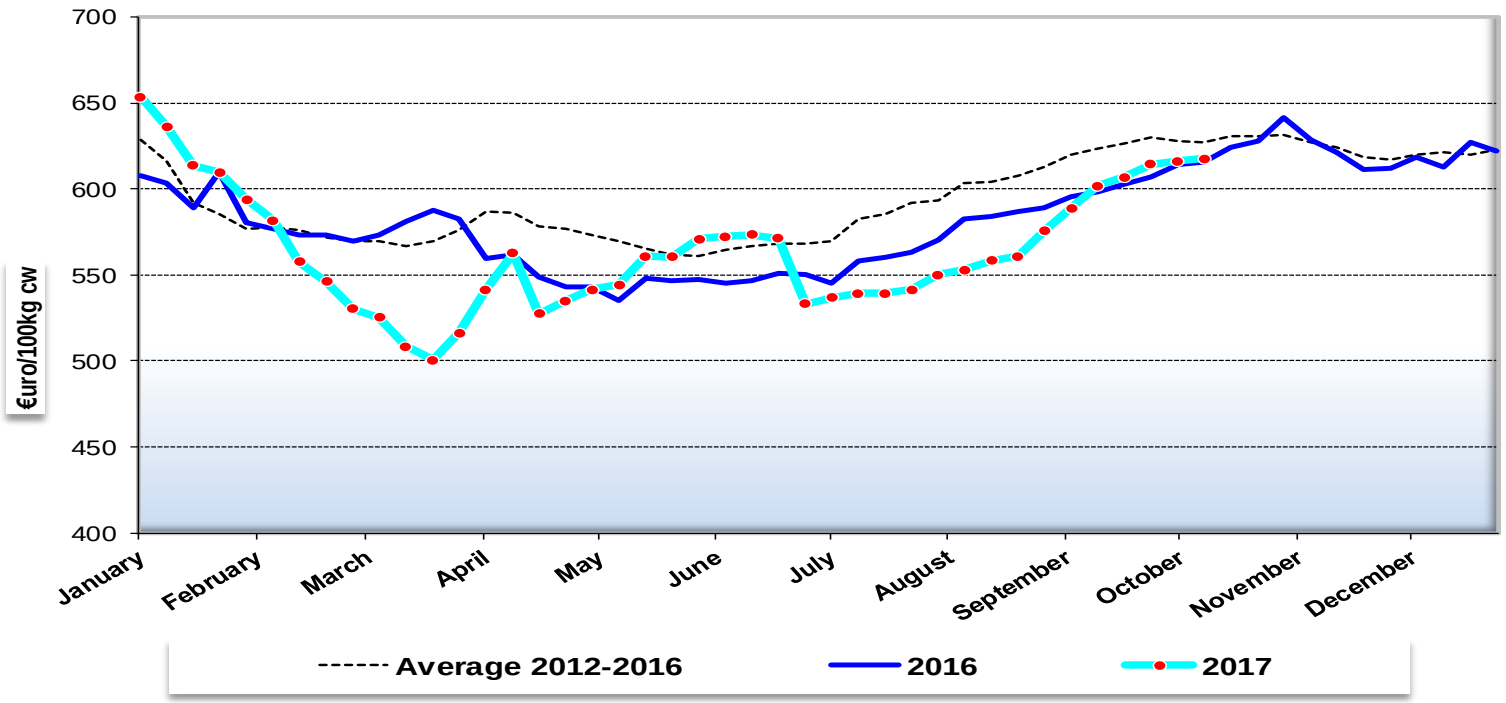
Evolution light lamb prices in the EU

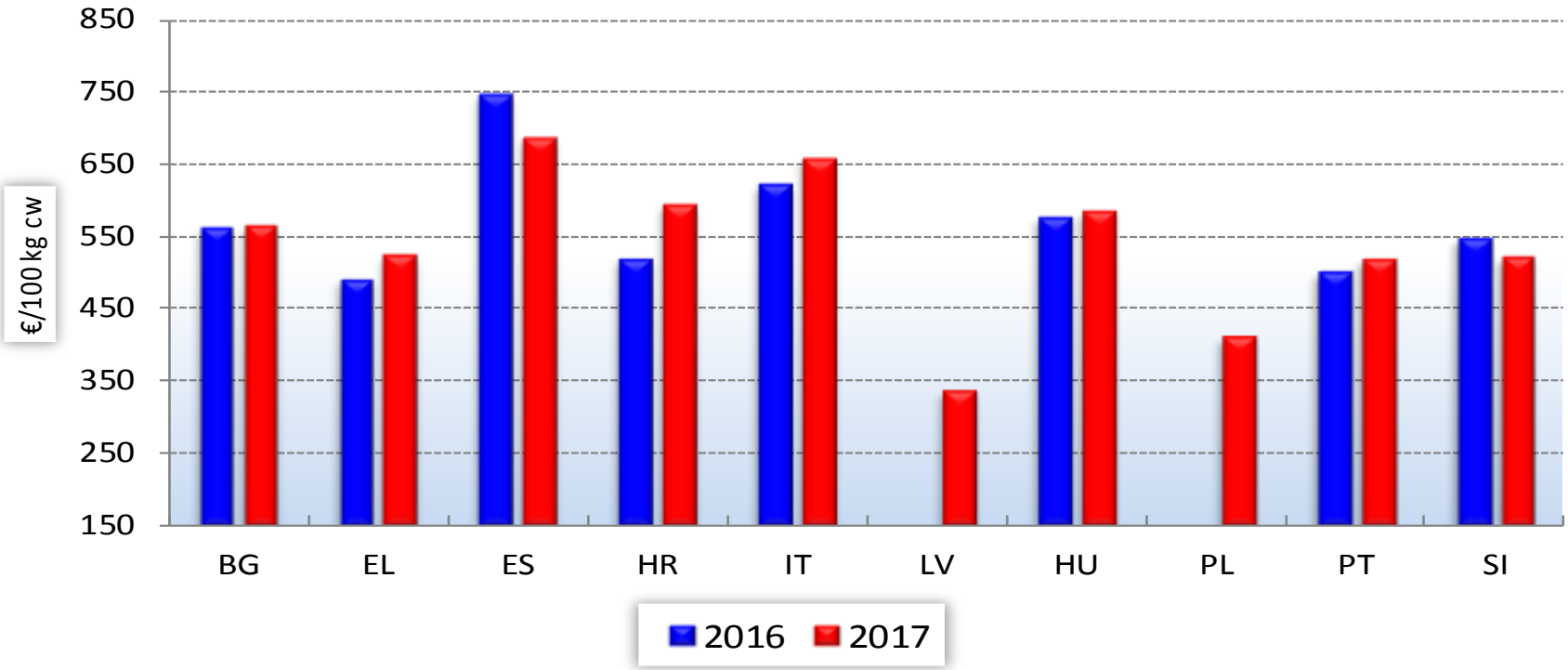
Latest price ==> 617.66 EUR/100 kg



SHEEP PRICES EU EVOLUTION

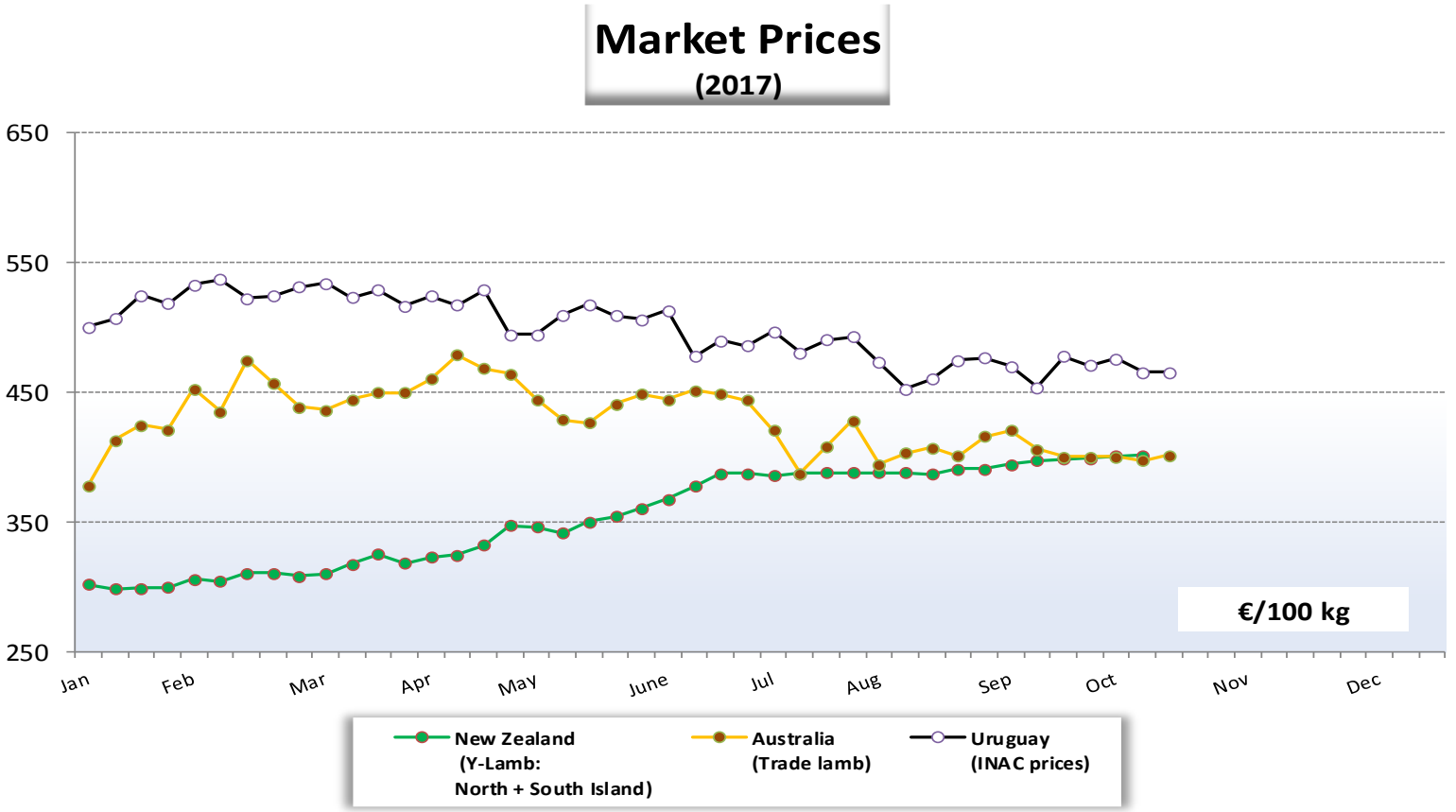
European Commission

Light lamb prices week 41



WORLD MARKET

SHEEP PRICES NZ, AUS, UY.



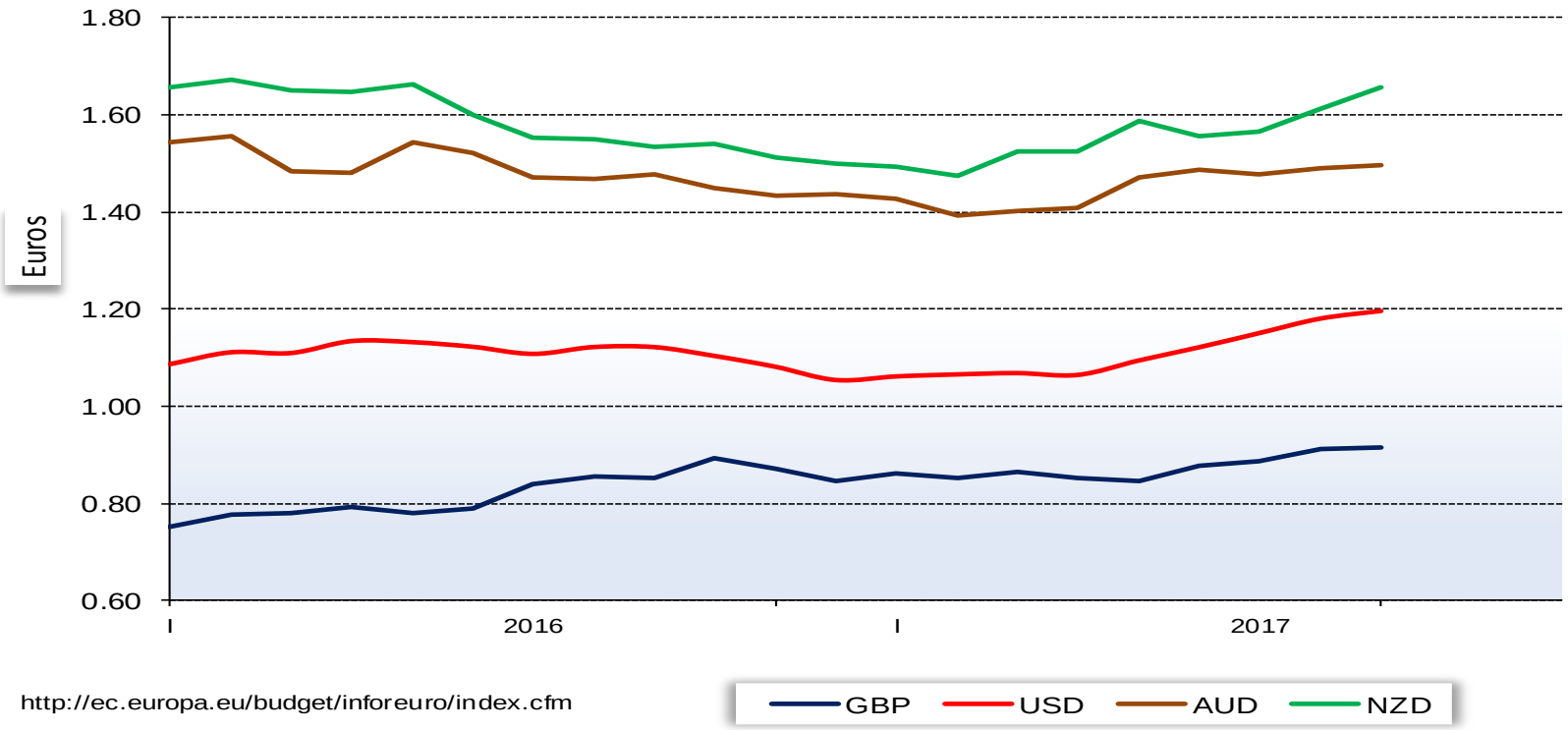
European Commission

Trade

Agriculture and Rural Development

European Commission

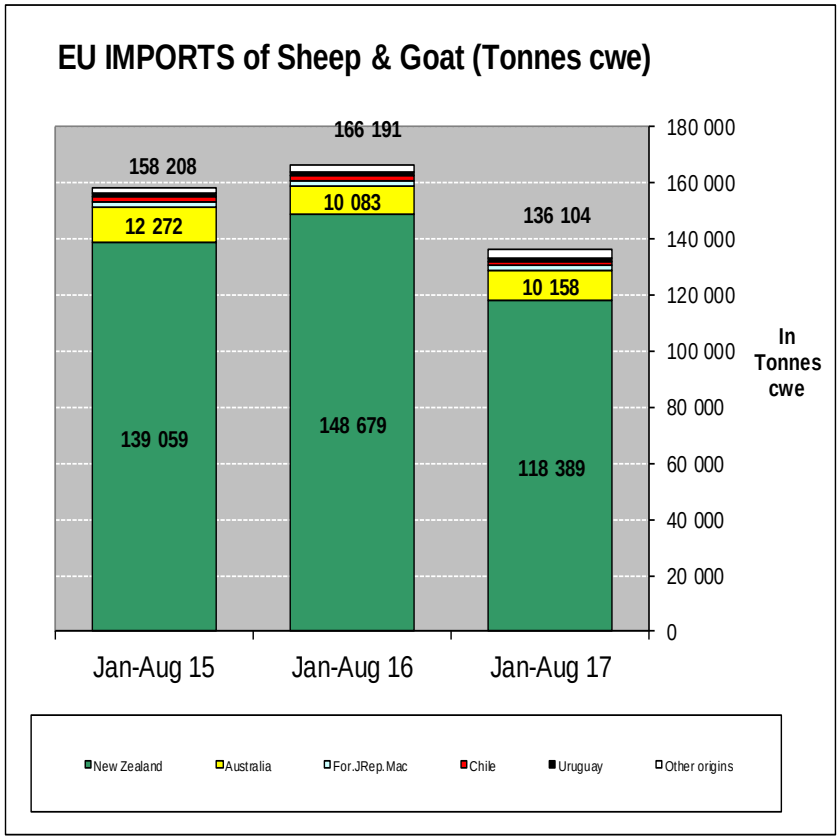
EXCHANGE RATE

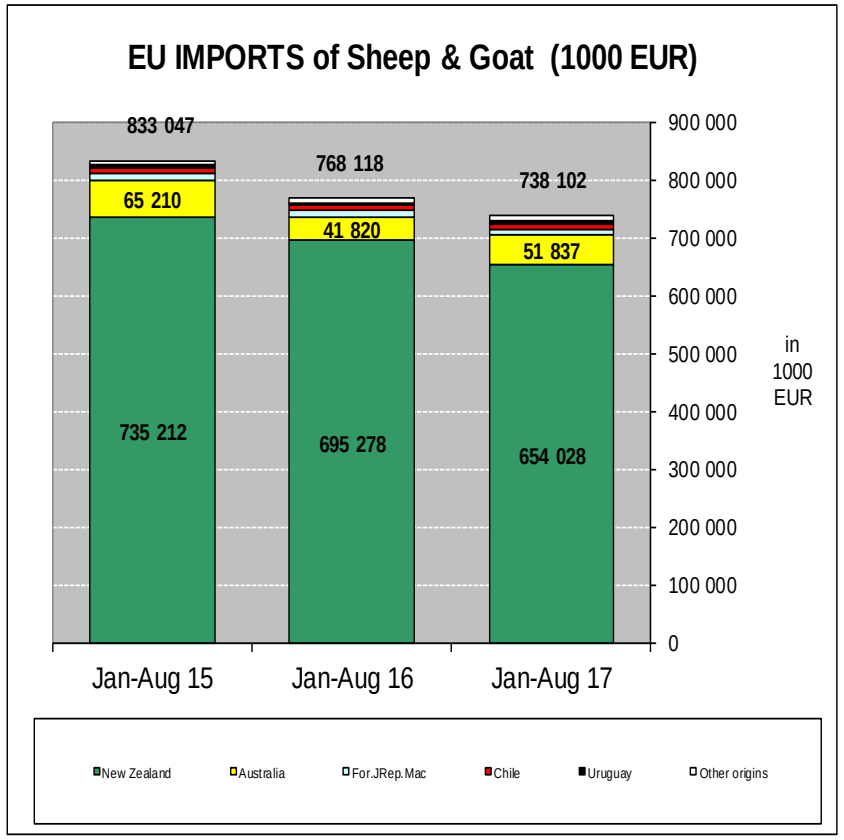


http://ec.europa.eu/budget/inforeuro/index.cfm

EU imports of sheep & goatmeat and live animals

Trade figures (COMEXT)





European Commission

UTILISATION OF SHEEPMEAT AND GOATMEAT TARIFF QUOTAS IN 2017

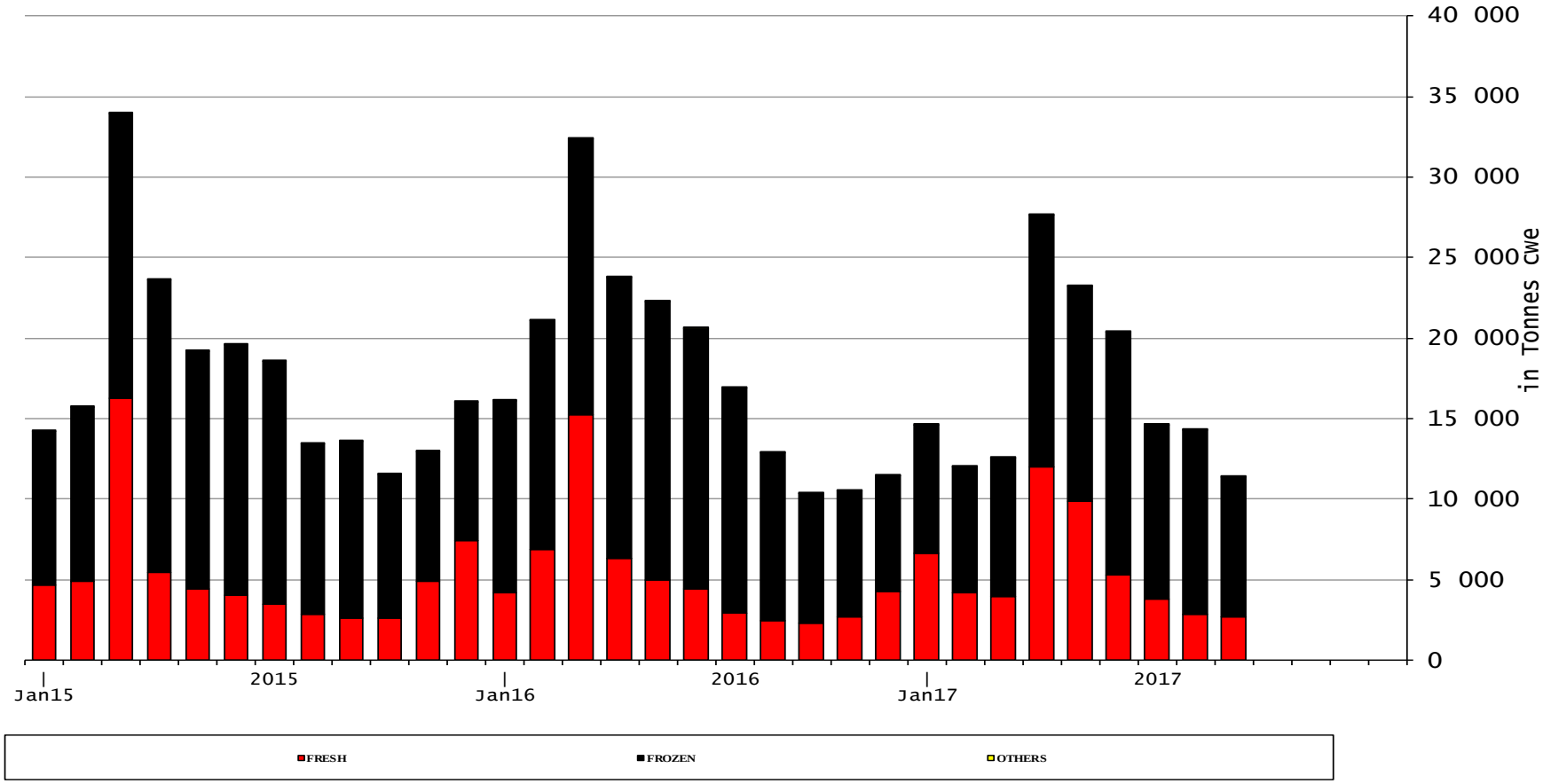
EU-28 : January > December 2017

Reg. 1354/2011

COUNTRY GROUP No	CN CODES	ORIGIN	Period: 01/01/2017 - 18-10-2017			Unit: tonnes cwe	
			Annual quota	Balance (remaining amount)	Actual import	Quota use %	Period: 01/01/2016 - 31/12/2016
1	0204	Argentina	23 000	22 350	650	3%	832
		Australia	19 186	6 979	12 207	64%	18 323
		New Zealand	228 254	105 962	122 292	54%	173 224
		Uruguay	5 800	4 373	1 427	25%	1 583
		Chile	7 800	5 819	1 981	25%	2 540
		Norway	300	300	0	0%	1
		Greenland	100	100	0	0%	0
		Faeroes	20	20	0	2%	1
		Turkey	200	200	0	0%	0
		Others	200	49	151	76%	0
		Erga Omnes	200	4	196	98%	186
2	0204 0210 99 21 0210 99 29 0210 99 60	Iceland	1 850	675	1 175	64%	1 316
3	0104 10 30 0104 10 80 0104 20 90	Erga Omnes	92	92	0	0%	0
TOTAL			**287 002**	**146 923**	**140 079**	**49%**	**198 006**

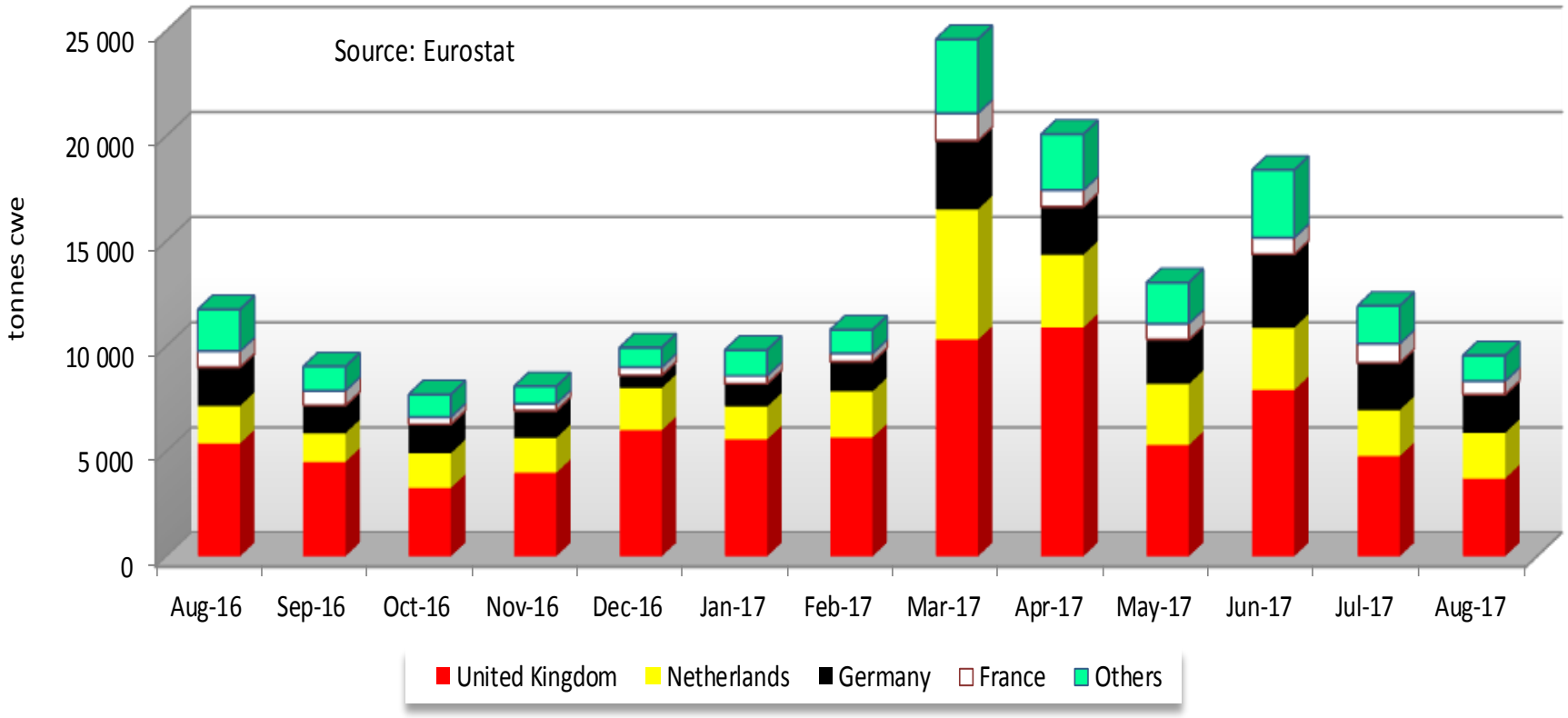
European Commission

EU-28 Imports of Sheep and Goat products



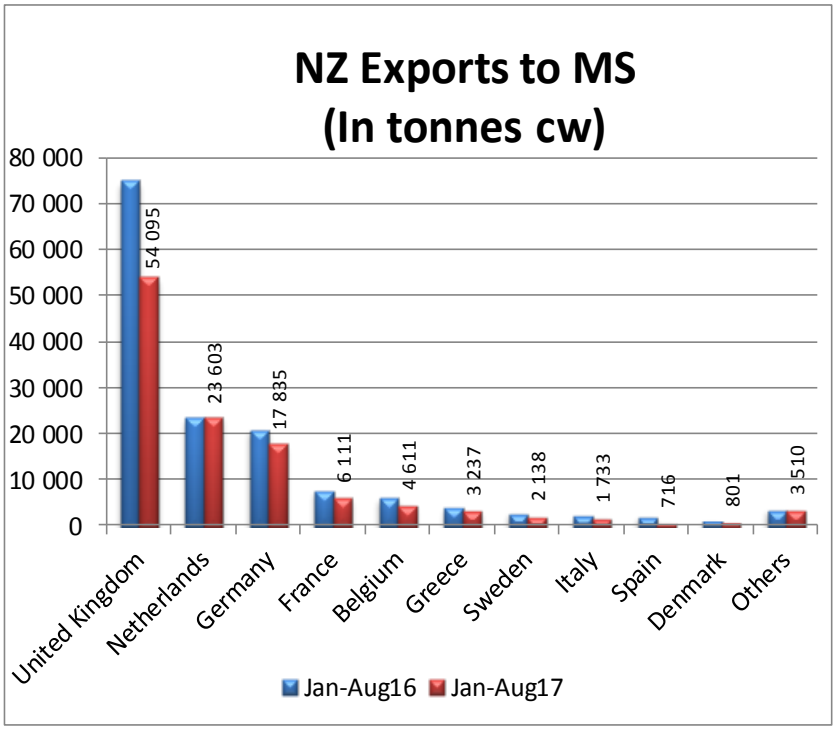
European Commission

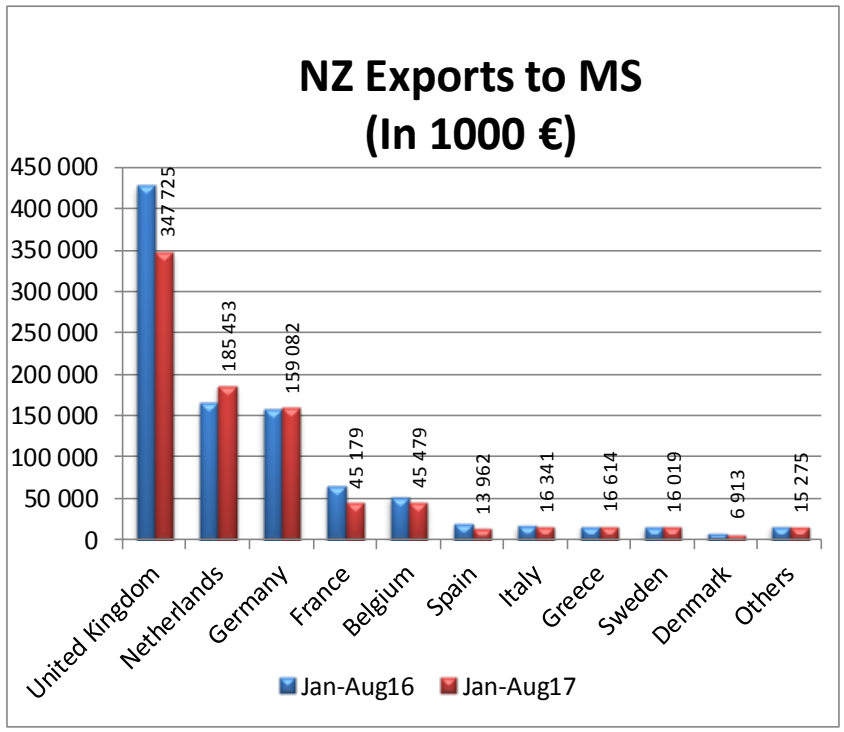
Evolution NZ exports of sheep meat to the EU



European Commission

Evolution NZ Exports of sheep meat in MS

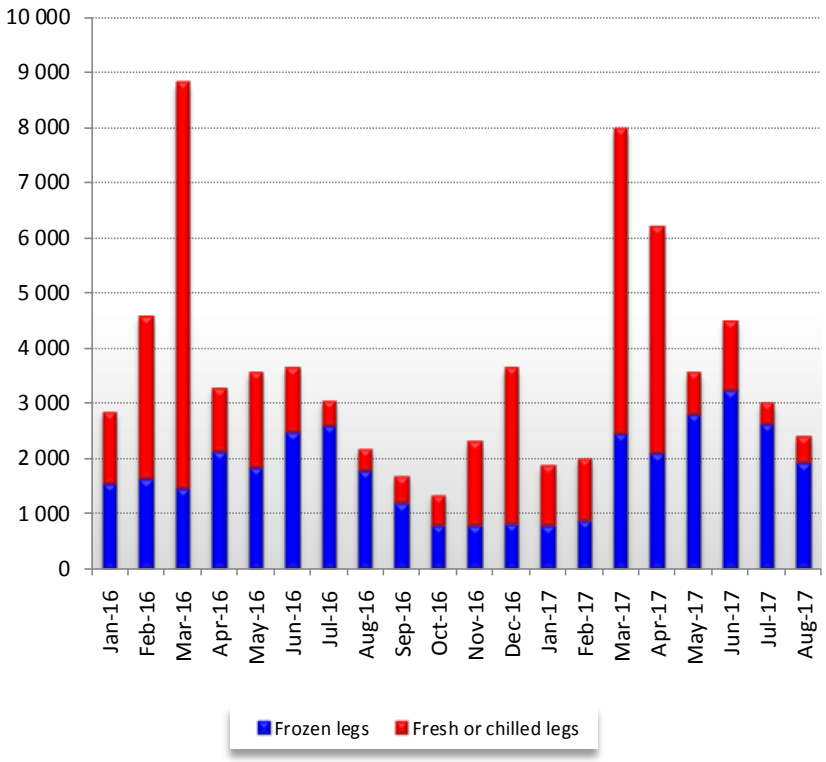




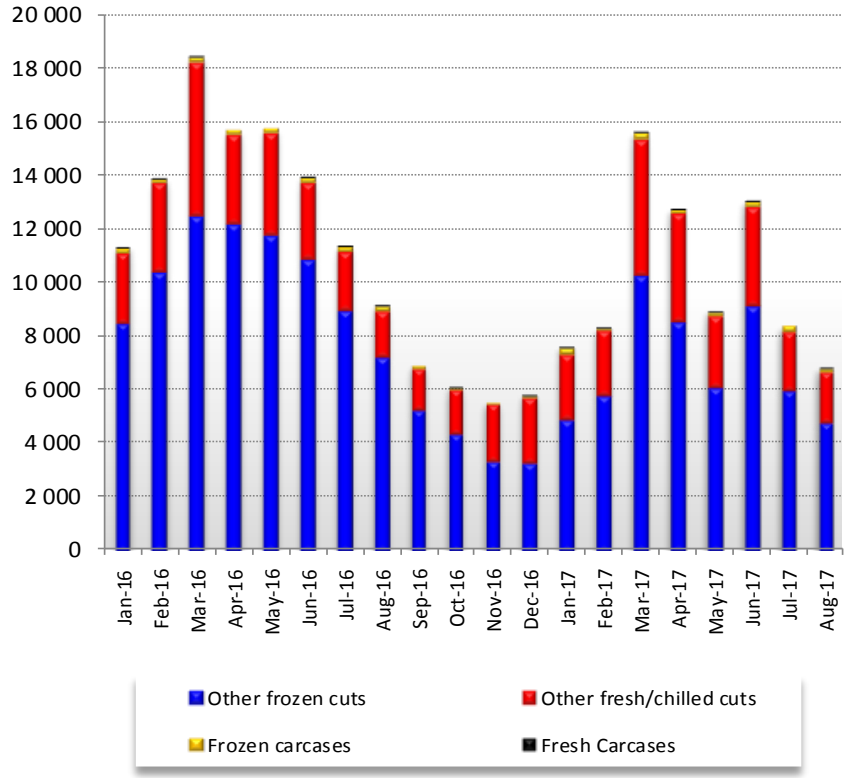
European Commission

Evolution NZ Exports of sheep meat products in EU (in cw)

Sheep legs

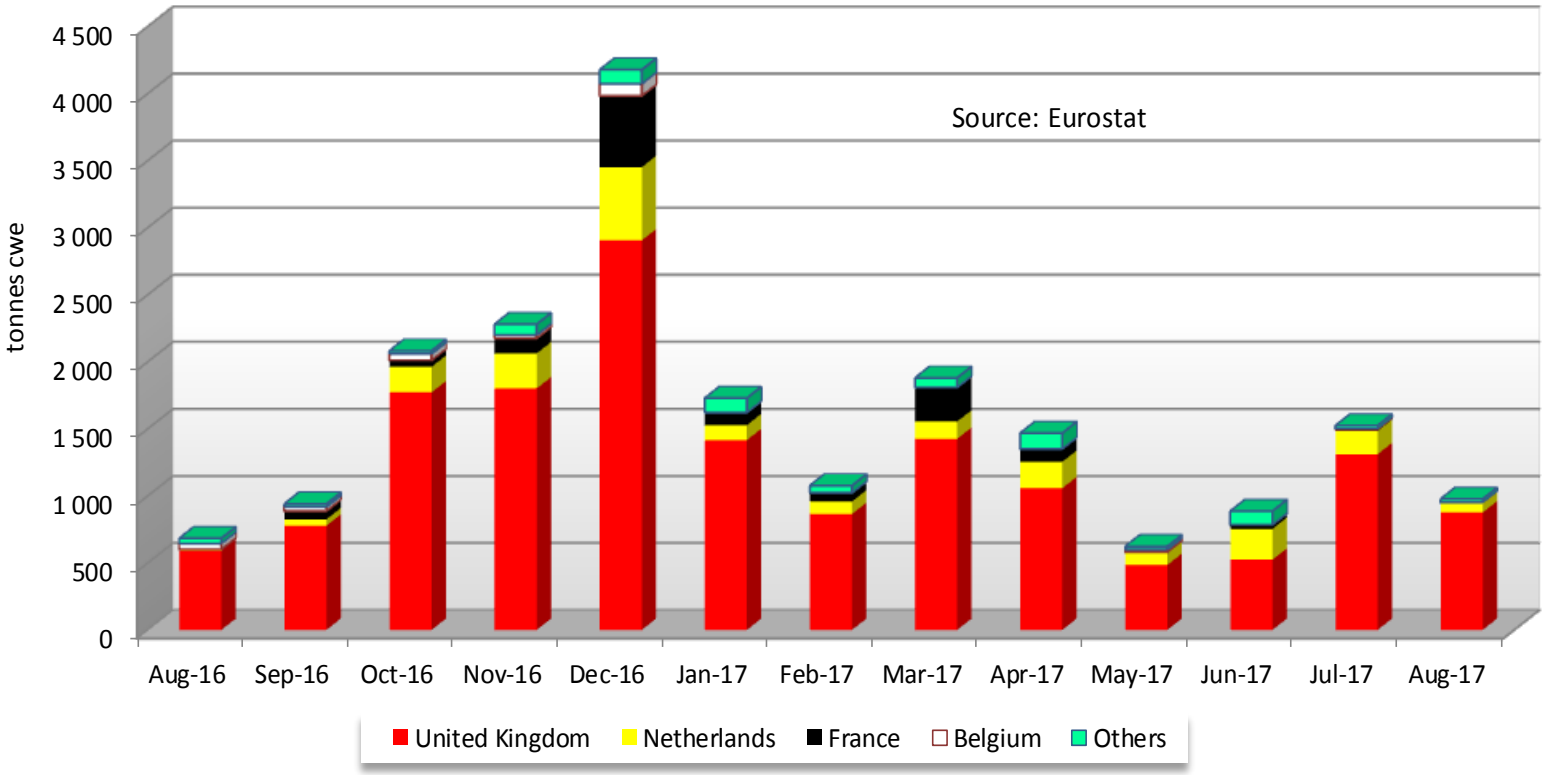


Other meat products



European Commission

Evolution AUS exports of sheep meat to the EU



EU exports of sheep & goatmeat and live animals

Trade figures (COMEXT)

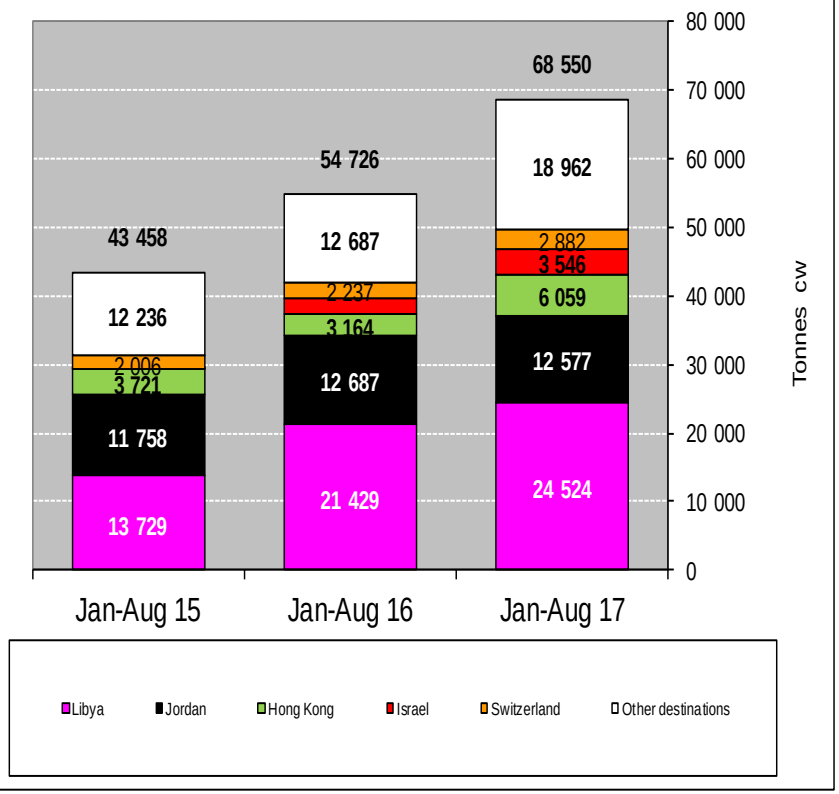
EXPORT

	2013		2014		2015		2016		Jan-Aug 17		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Aug 16
Libya	23 502	31.3%	25 122	33.9%	21 280	33.6%	27 875	35.1%	24 524	35.8%	+ 14.4%
Jordan	7 036	9.4%	7 841	10.6%	14 405	22.8%	18 350	23.1%	12 577	18.3%	- 0.9%
Hong Kong	23 122	30.8%	19 375	26.2%	5 643	8.9%	6 203	7.8%	6 059	8.8%	+ 91.5%
Israel	11	0.0%	12	0.0%	71	0.1%	3 395	4.3%	3 546	5.2%	+ 40.6%
Switzerland	3 243	4.3%	2 589	3.5%	2 945	4.7%	3 206	4.0%	2 882	4.2%	+ 28.8%
Lebanon	2 434	3.2%	3 029	4.1%	4 035	6.4%	2 902	3.7%	2 069	3.0%	- 6.8%
U.A.Emirates	320	0.4%	1 096	1.5%	577	0.9%	697	0.9%	1 775	2.6%	+++
Algeria	1 355	1.8%	1 951	2.6%	2 538	4.0%	2 043	2.6%	1 699	2.5%	+ 2.0%
Turkey	669	0.9%	157	0.2%	552	0.9%	361	0.5%	1 127	1.6%	+++
Ghana	3 138	4.2%	1 810	2.4%	2 920	4.6%	2 230	2.8%	1 119	1.6%	- 33.6%
Kuwait	67	0.1%	77	0.1%	0	0.0%	413	0.5%	878	1.3%	+++
Ivory Coast	1 118	1.5%	1 350	1.8%	1 164	1.8%	1 610	2.0%	859	1.3%	- 8.9%
Vietnam	25	0.0%	123	0.2%	352	0.6%	1 047	1.3%	759	1.1%	+ 60.6%
Oman	54	0.1%	143	0.2%	24	0.0%	768	1.0%	735	1.1%	+ 145.1%
Other Destinations	9 055	12.0%	9 386	12.7%	6 761	10.7%	8 315	10.5%	7 941	11.6%	+ 49.5%
Extra-EU	75 149		74 060		63 266		79 418		68 550		
% change			- 1%		- 15%		+ 26%		+ 25.3%		

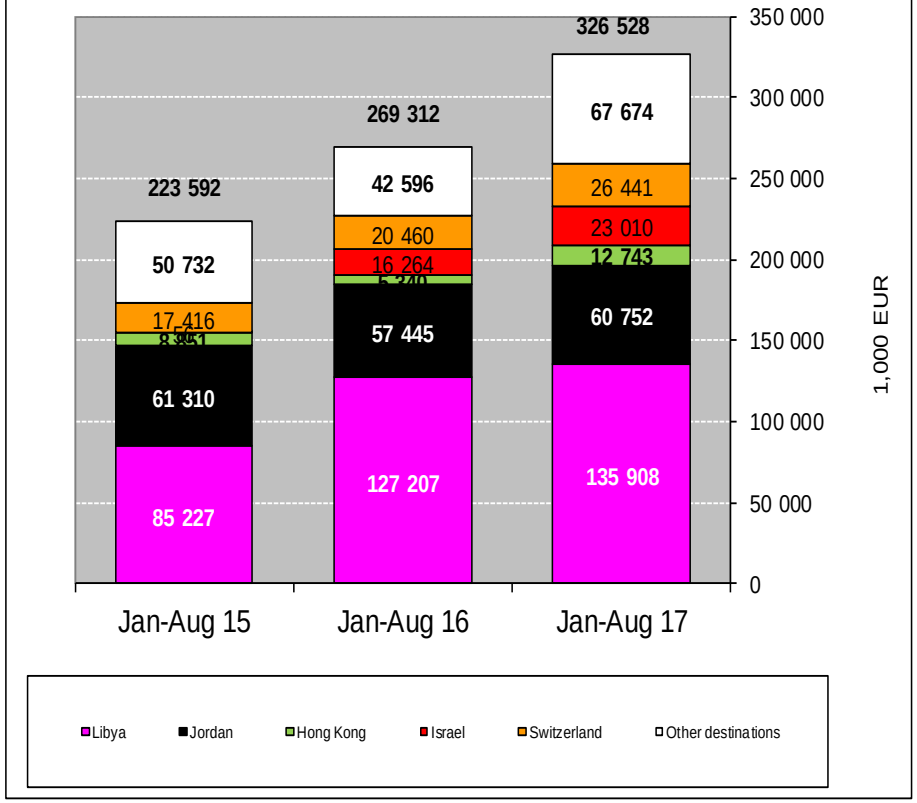
EU exports of sheep & goatmeat and live animals

Trade figures (COMEXT)

EU EXPORTS of Sheep & Goat (Tonnes cwe)

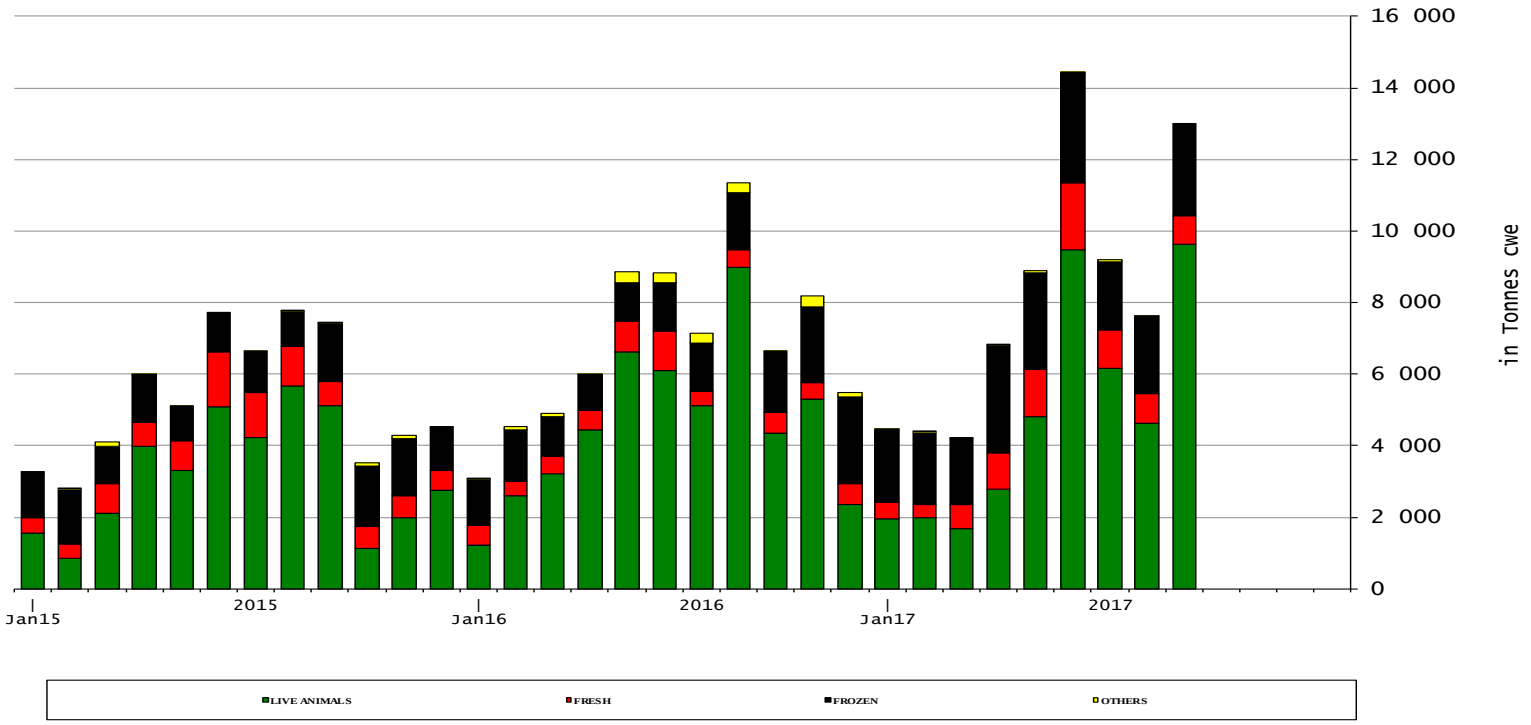


EU EXPORTS of Sheep & Goat (1000 EUR)



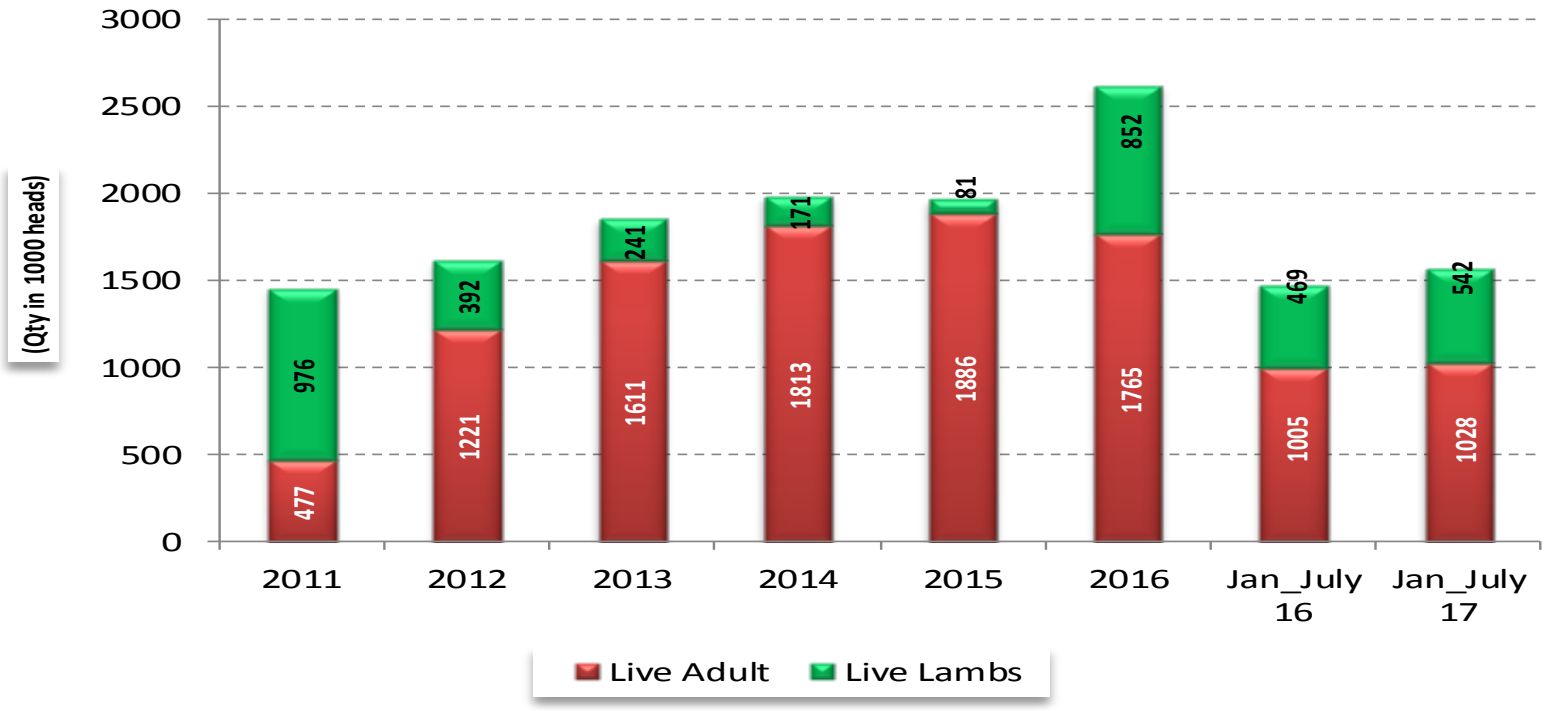
European Commission

EU-28 Exports of Sheep and Goat products



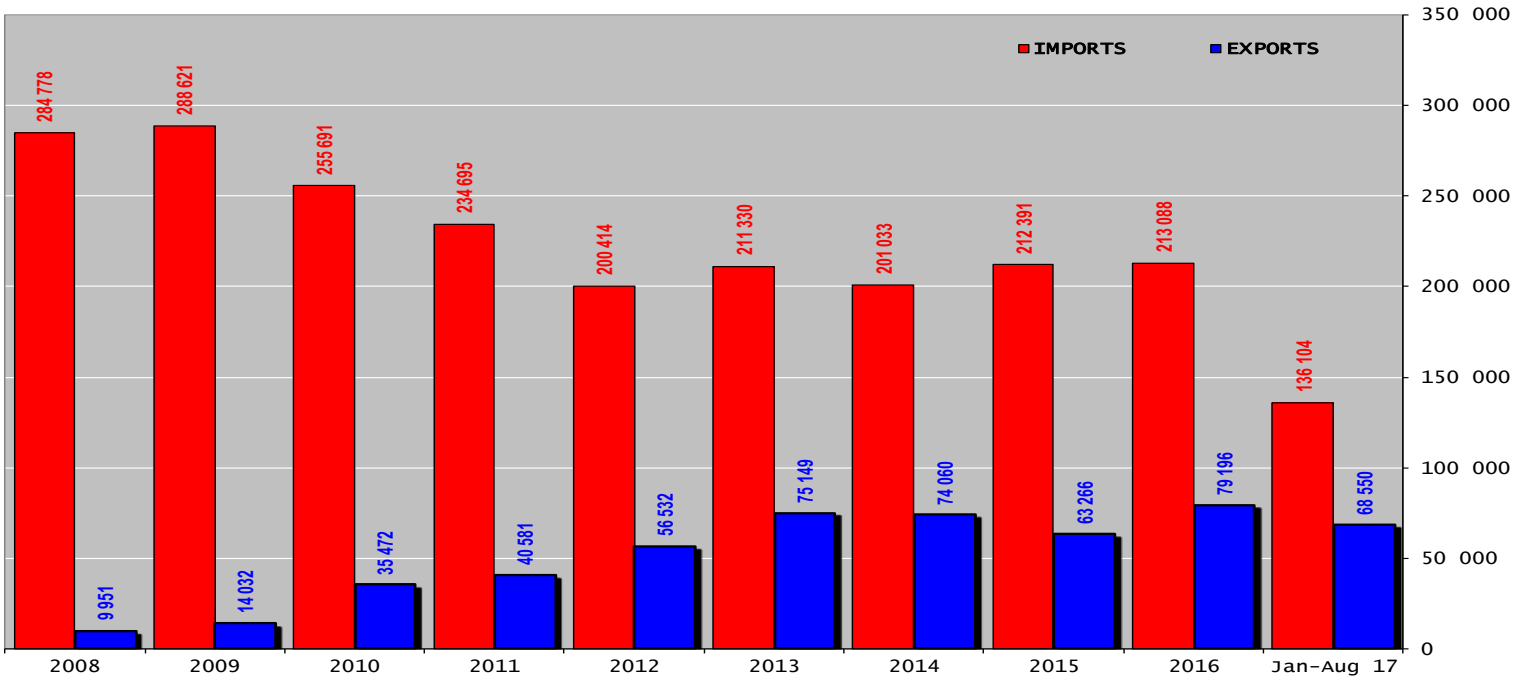
European Commission

Evolution EU 28 exports of live sheep
(Excluding pure-bred breeding)



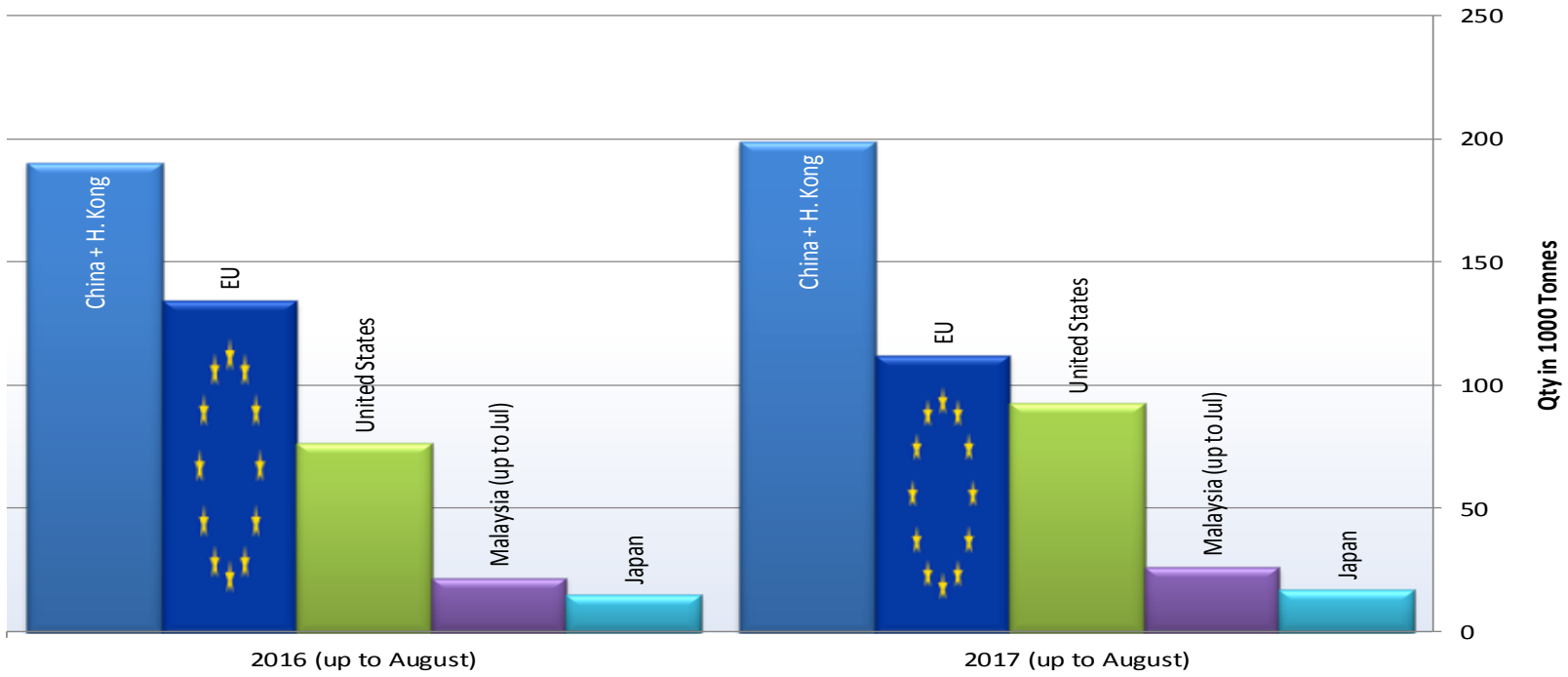
European Commission

EU Sheep and Goat Meat Trade Balance, tonnes cwe



European Commission

Main Importers of SHEEP&Goat Products (up to August)

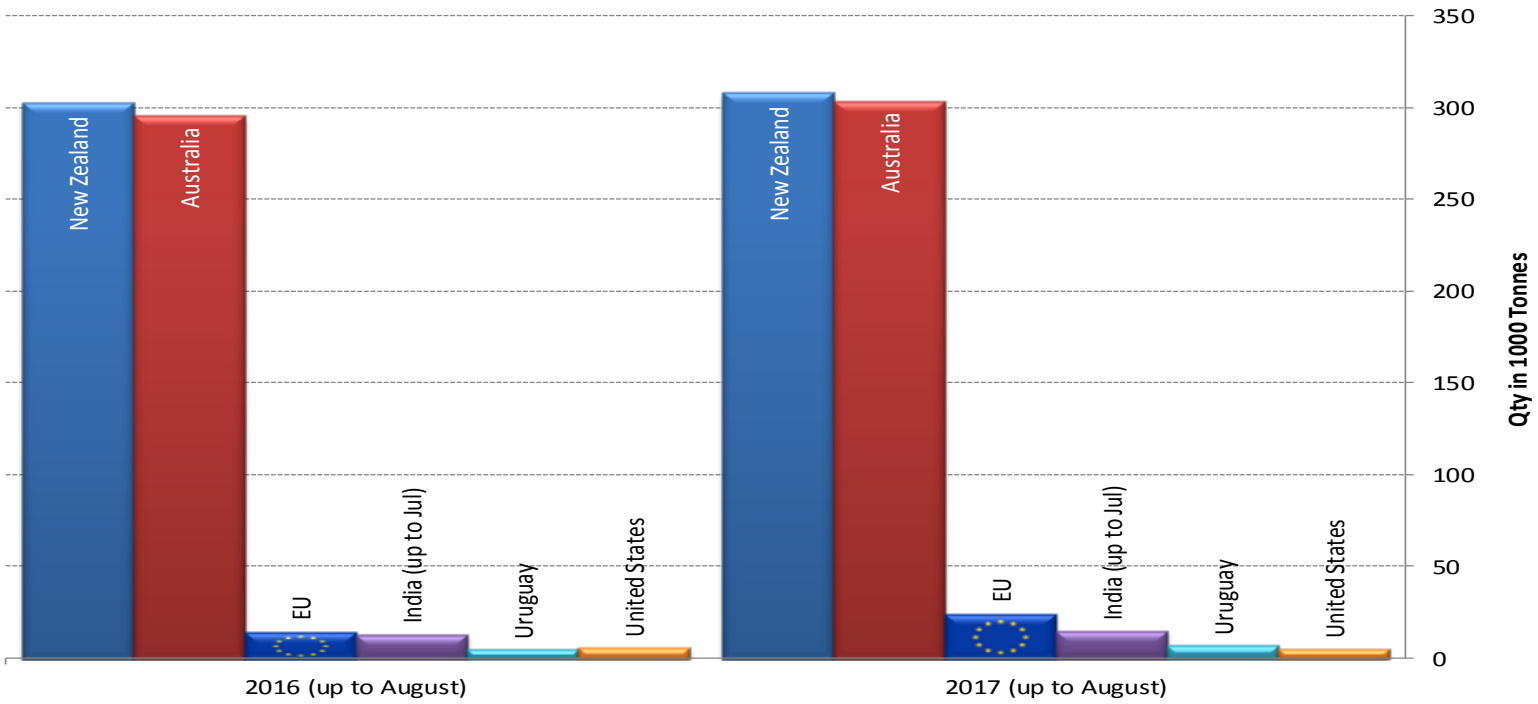


Source : GTA

Excl. Live animals

European Commission

Main Exporters of SHEEP&GOAT Products (up to August)



Source : GTA

Excl. Live animals

European Commission

Outlook

Agriculture and Rural Development

OUTLOOK

European Commission

SHEEP LIVESTOCK BALANCE (Thousand Heads)

Estimates of OCTOBER 2017

		2016	2017(f)	2018(f)	17/16 %	18/17 %
BE		105.0	105.0	104.0		- 1.0%
BG		1 360.0	1 300.0	1 290.0	- 4.4%	- 0.8%
CZ		11.8	12.4	12.4	+ 4.6%	
DK		77.7	77.3	77.3	- 0.5%	
DE		1 574.0	1 580.0	1 600.0	+ 0.4%	+ 1.3%
EE		5.6	6.6	6.6	+ 18.9%	
IE		3 438.2	3 470.0	3 450.0	+ 0.9%	- 0.6%
EL		9 216.0	9 050.0	8 900.0	- 1.8%	- 1.7%
ES		15 963.0	15 360.0	14 745.0	- 3.8%	- 4.0%
FR		7 157.0	7 007.6	6 902.5	- 2.1%	- 1.5%
HR		571.6	679.5	690.0	+ 18.9%	+ 1.5%
HU		1 141.0	1 150.0	1 150.0	+ 0.8%	
MT		4.9	5.9	5.9	+ 20.7%	
IT		7 284.9	7 248.4	7 270.2	- 0.5%	+ 0.3%
CY		143.9	151.0	151.0	+ 4.9%	
LV		125.0	130.0	135.0	+ 4.0%	+ 3.8%
LT		7.5	7.2	7.2	- 4.0%	
LU		2.3	2.5	2.5	+ 9.5%	
NL		551.6	546.5	546.5	- 0.9%	
AT		378.0	378.0	378.0		
PL		180.0	200.0	260.0	+ 11.1%	+ 30.0%
PT		2 068.0	2 092.0	2 092.0	+ 1.2%	
RO		9 875.0	13 328.0	13 000.0	+ 35.0%	- 2.5%
SI		9.8	10.8	10.8	+ 9.6%	
SE		578.2	584.2	590.3	+ 1.0%	+ 1.0%
SK		376.0	372.0	371.0	- 1.1%	- 0.3%
FI		61.2	64.2	64.2	+ 4.9%	
UK		23 819.0	24 400.0	24 250.0	+ 2.4%	- 0.6%

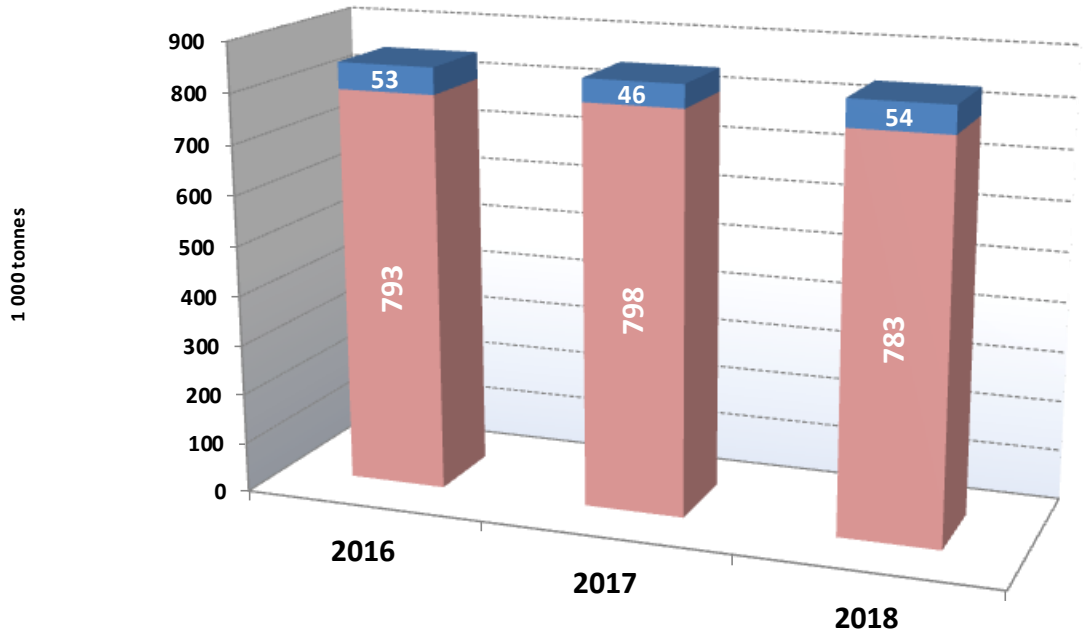
EU heads	Total	86 086	89 319	88 062		
	Change		+ 3.76%	- 1.41%	+ 3.8%	- 1.4%

Red figures - Eurostat data

European Commission

Sheep + goat production balance
(Foreseen from FWG* experts)

Missing expert data from :
BE, NL, PL

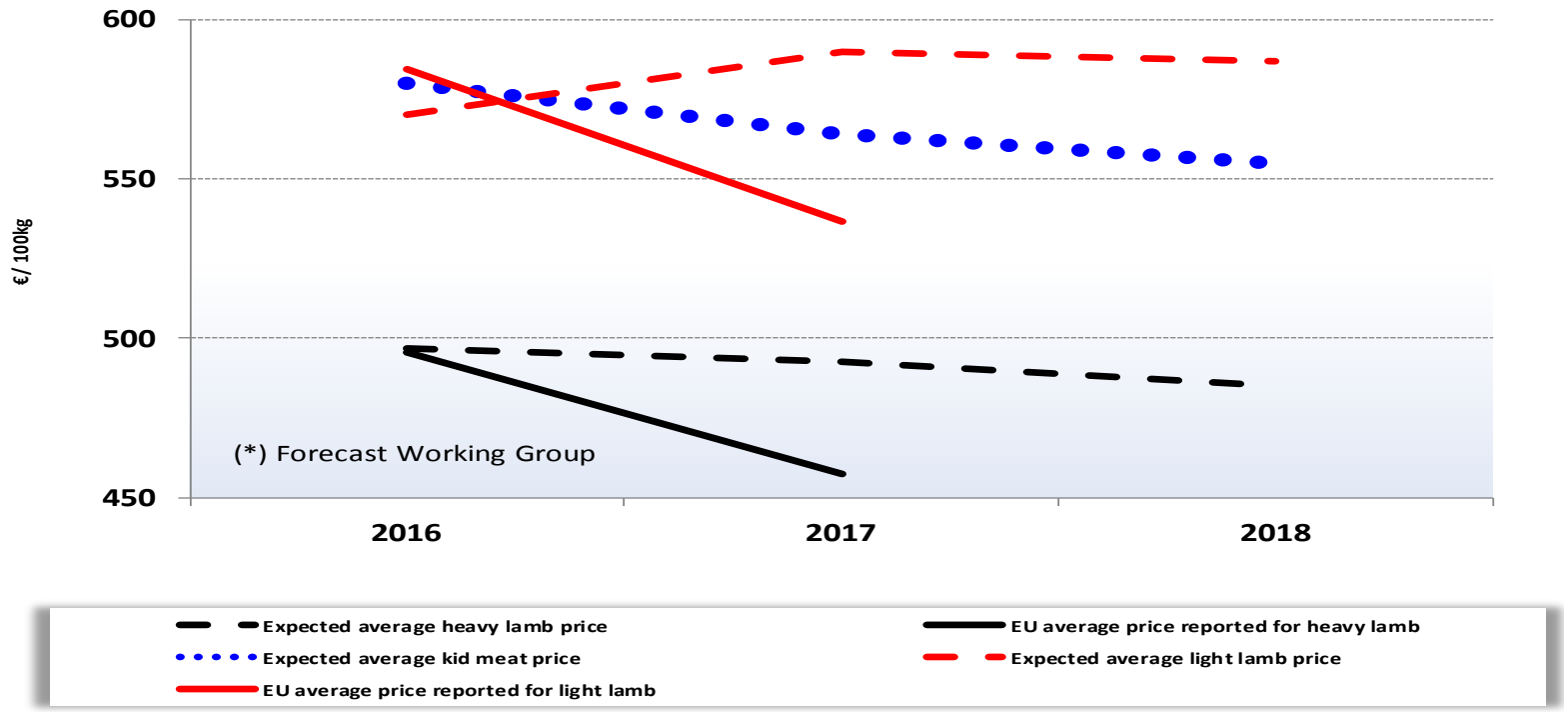


(*) Forecast Working Group

European Commission

Prices for lamb and goat meat
(based on FWG (*) experts or weekly reported data)

Missing expert data from :
BE, NL



European Commission

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