European Commission

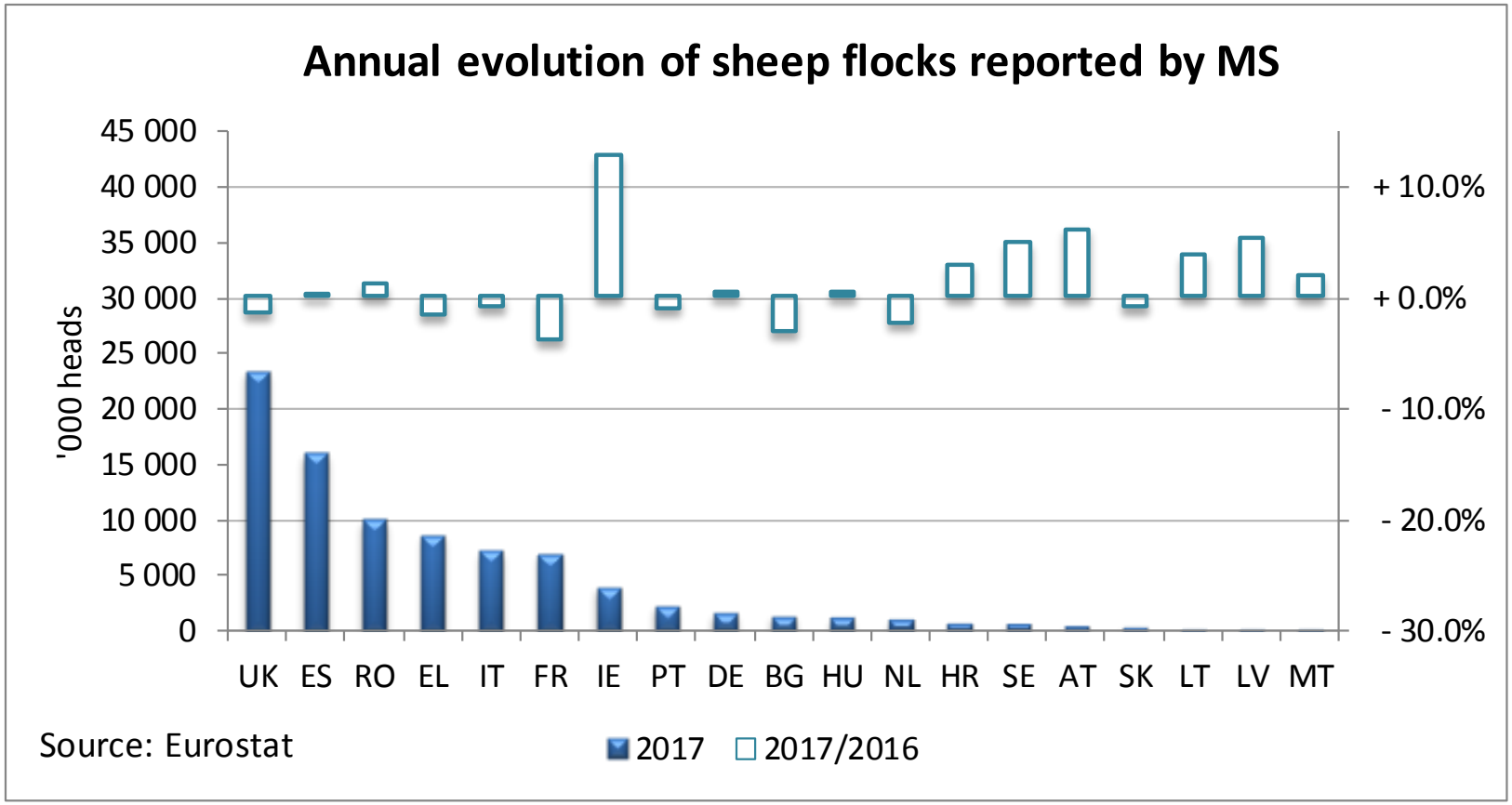
SHEEP / GOAT WORKING GROUP
Market Situation for Sheep & Goats
11 June 2018

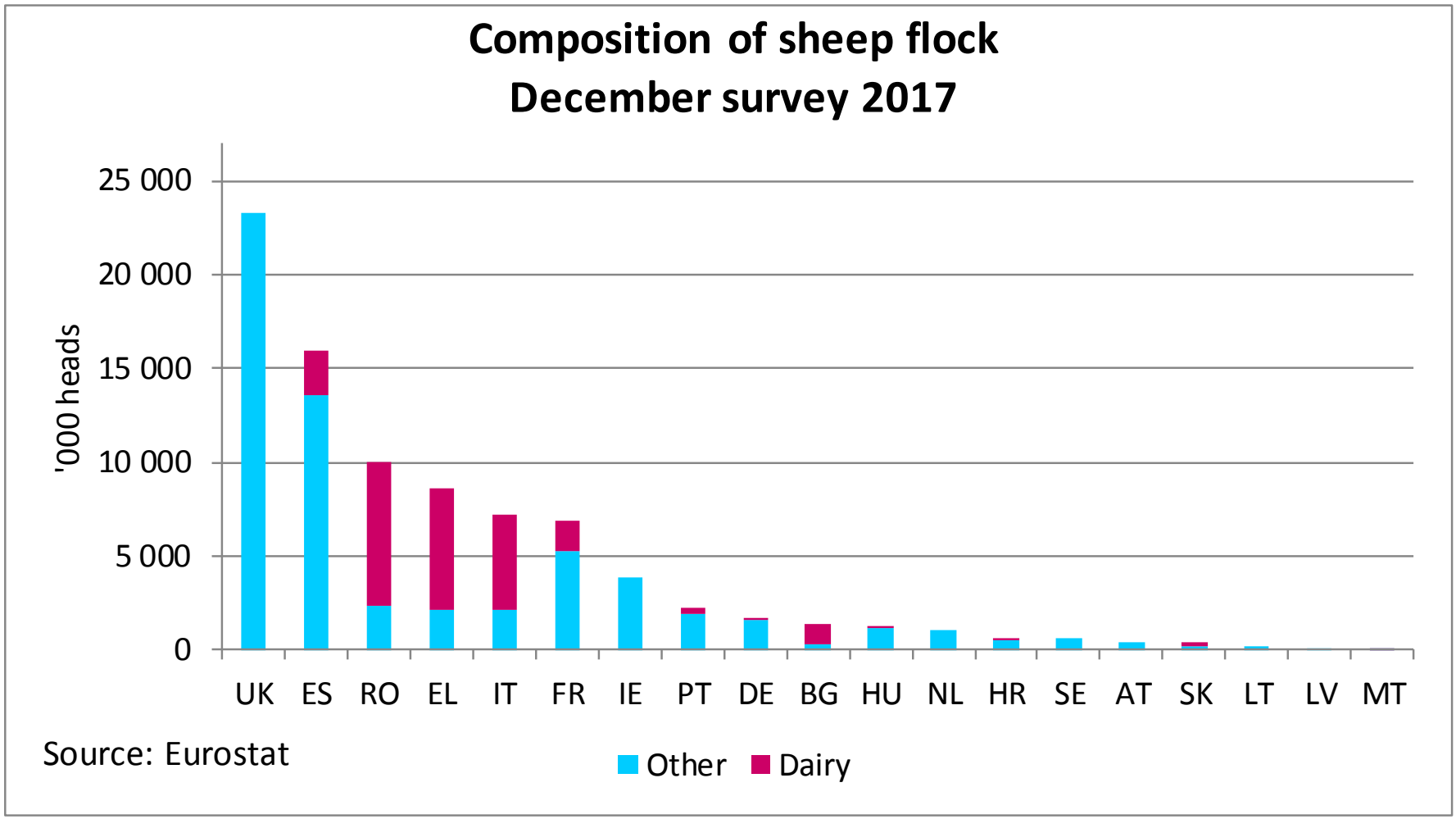
Agriculture and Rural Development

European Commission

Production

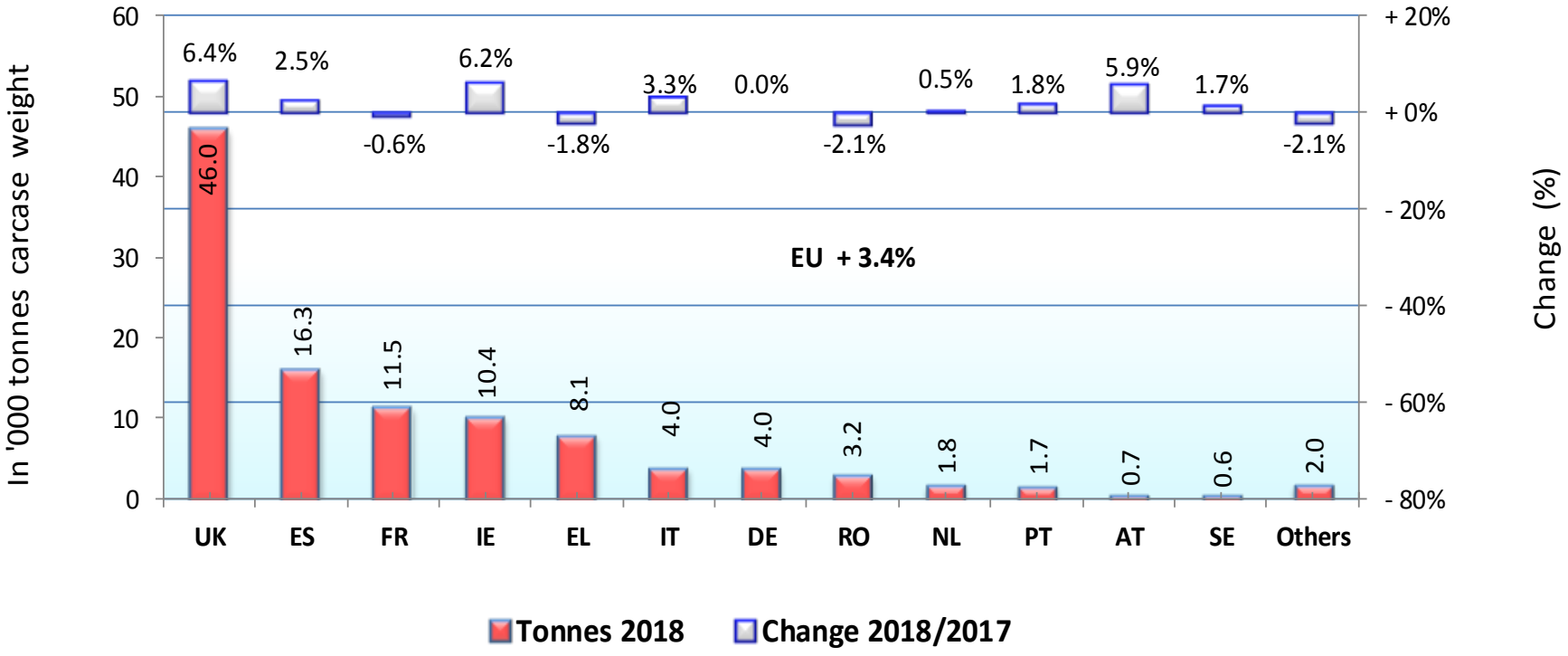
Agriculture and Rural Development


Annual evolution of sheep flocks reported by MS
'000 heads
45 000
40 000
35 000
30 000
25 000
20 000
15 000
10 000
5 000
0
+ 10.0%
+ 0.0%
- 10.0%
- 20.0%
- 30.0%
UK ES RO EL IT FR IE PT DE BG HU NL HR SE AT SK LT LV MT
Source: Eurostat
2017
2017/2016

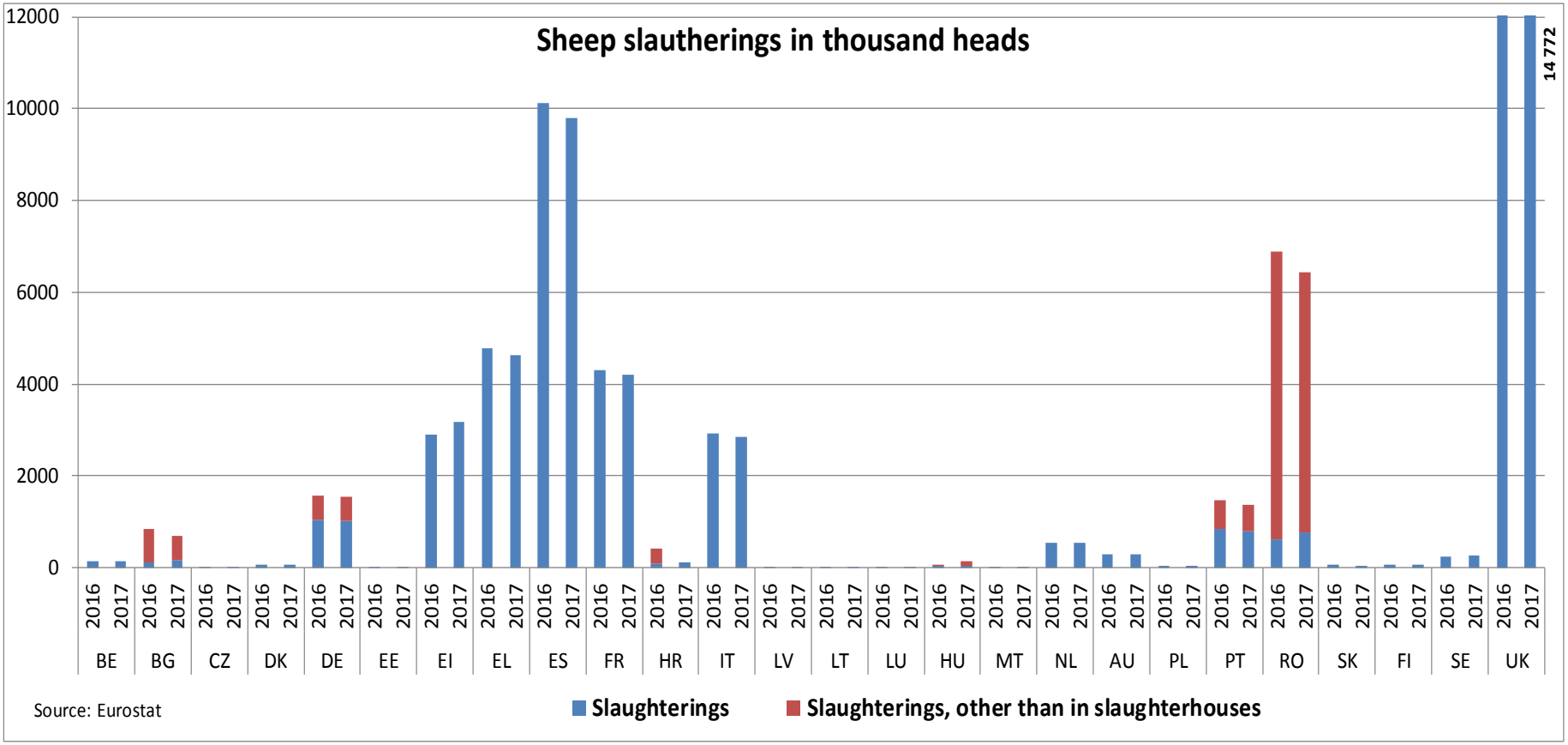

Composition of sheep flock
December survey 2017
'000 heads
25 000
20 000
15 000
10 000
5 000
0
UK ES RO EL IT FR IE PT DE BG HU NL HR SE AT SK LT LV MT
Source: Eurostat
Other
Dairy

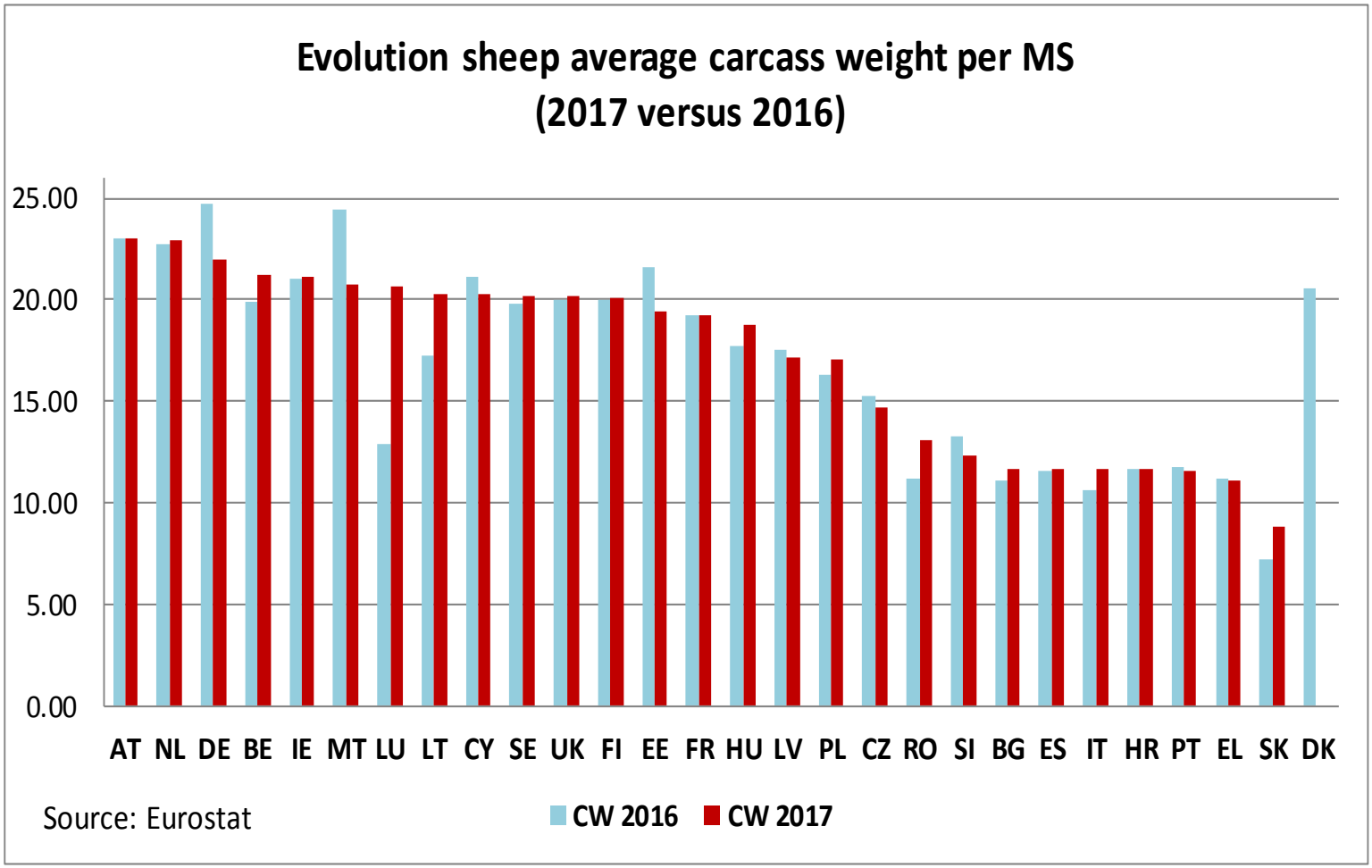
European Commission

Sheep slaughtering for EU
2018/2017 (up to February)



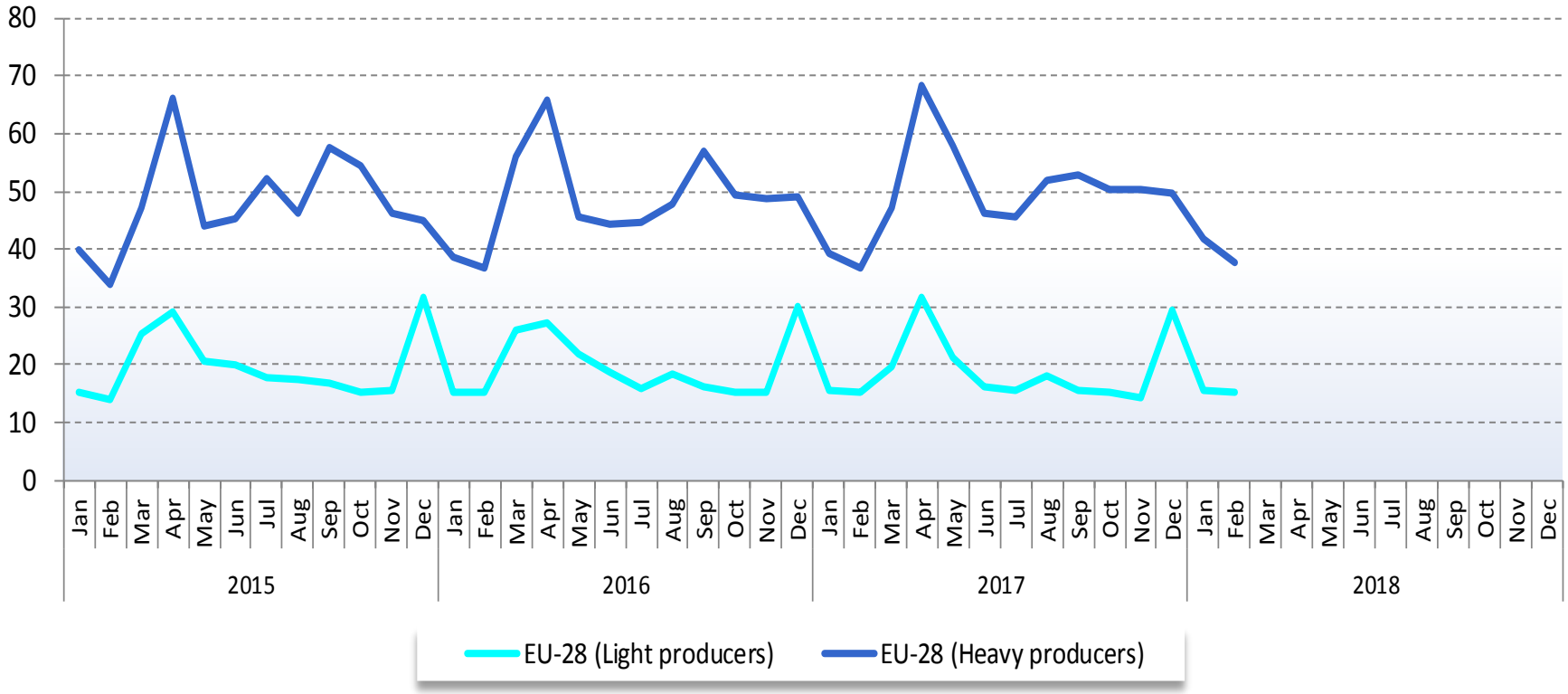
PRODUCTION


Sheep slautherings in thousand heads
12000
10000
8000
6000
4000
2000
0
14 772
2016 2017
BE BG CZ DK DE EE EI EL ES FR HR IT LV LT LU HU MT NL AU PL PT RO SK FI SE UK
Source: Eurostat
Slaughterings
Slaughterings, other than in slaughterhouses


Evolution sheep average carcass weight per MS
(2017 versus 2016)
25.00
20.00
15.00
10.00
5.00
0.00
AT NL DE BE IE MT LU LT CY SE UK FI EE FR HU LV PL CZ RO SI BG ES IT HR PT EL SK DK
Source: Eurostat
CW 2016
CW 2017

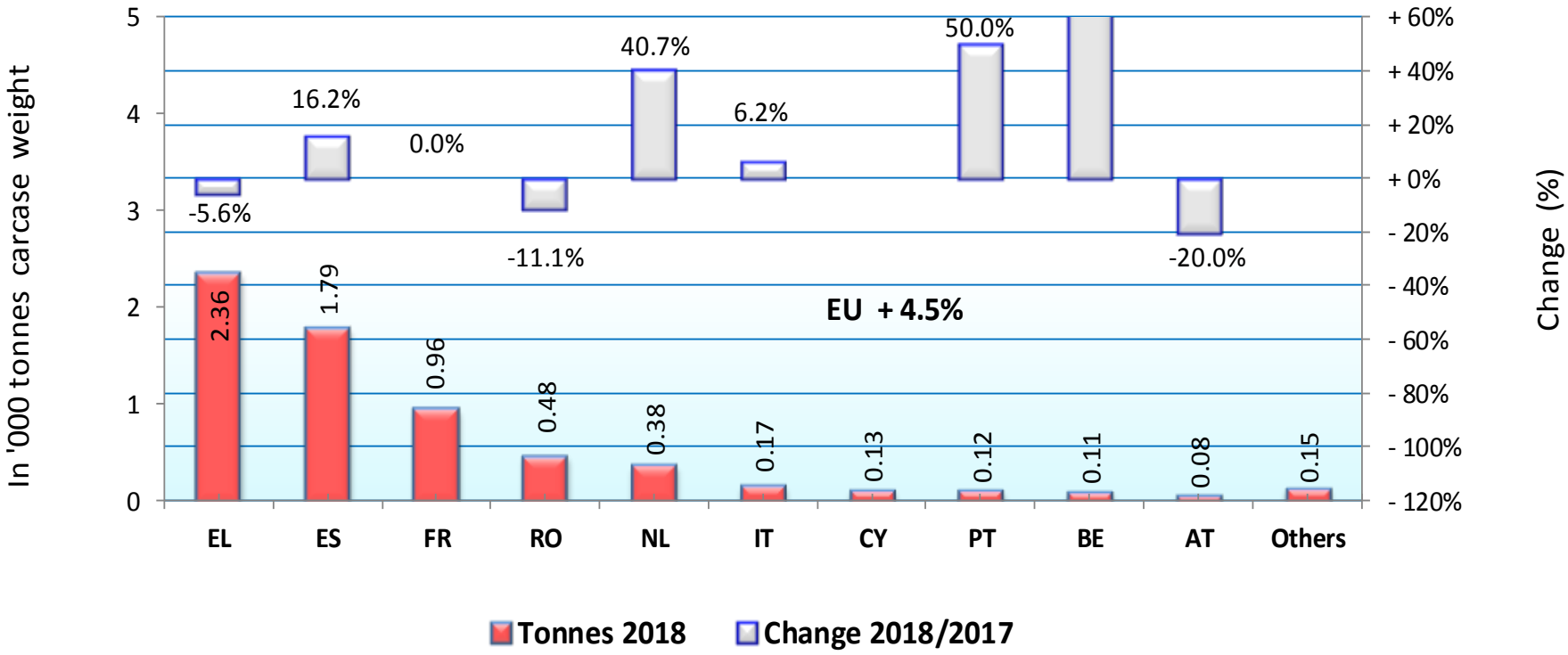
European Commission

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



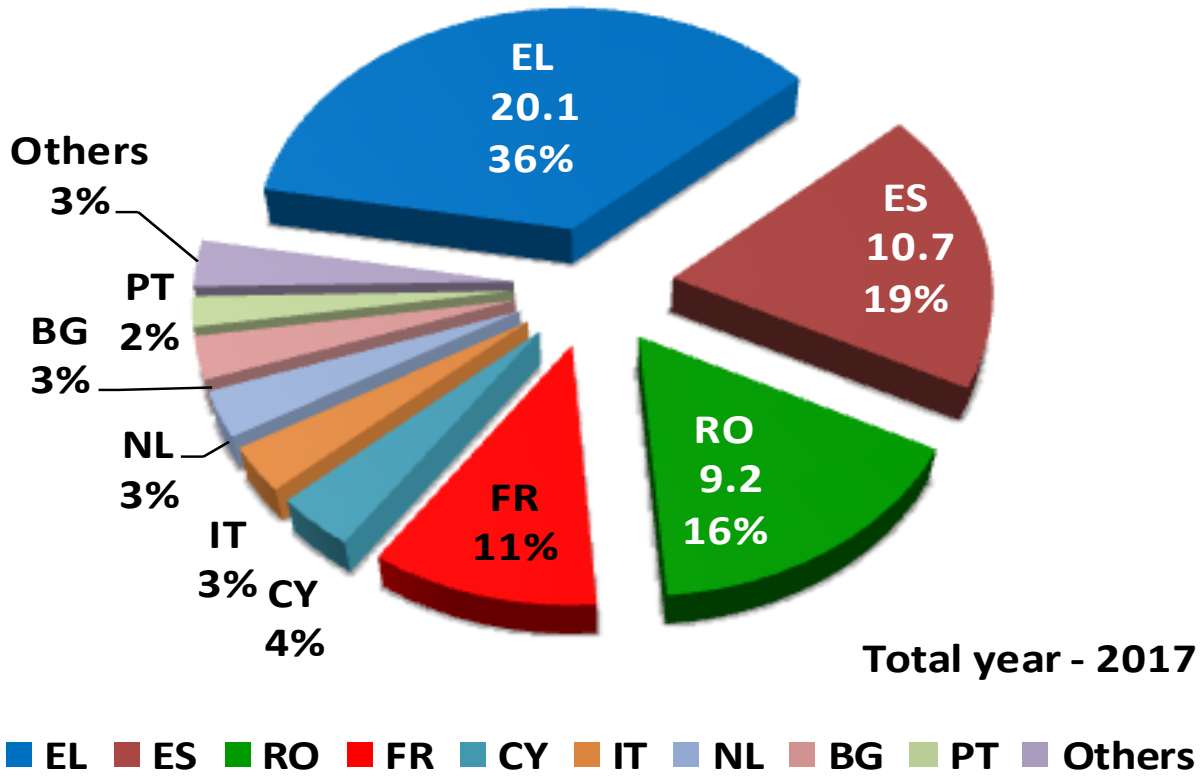
European Commission

Goat slaughtering for EU
2018/2017 (up to February)

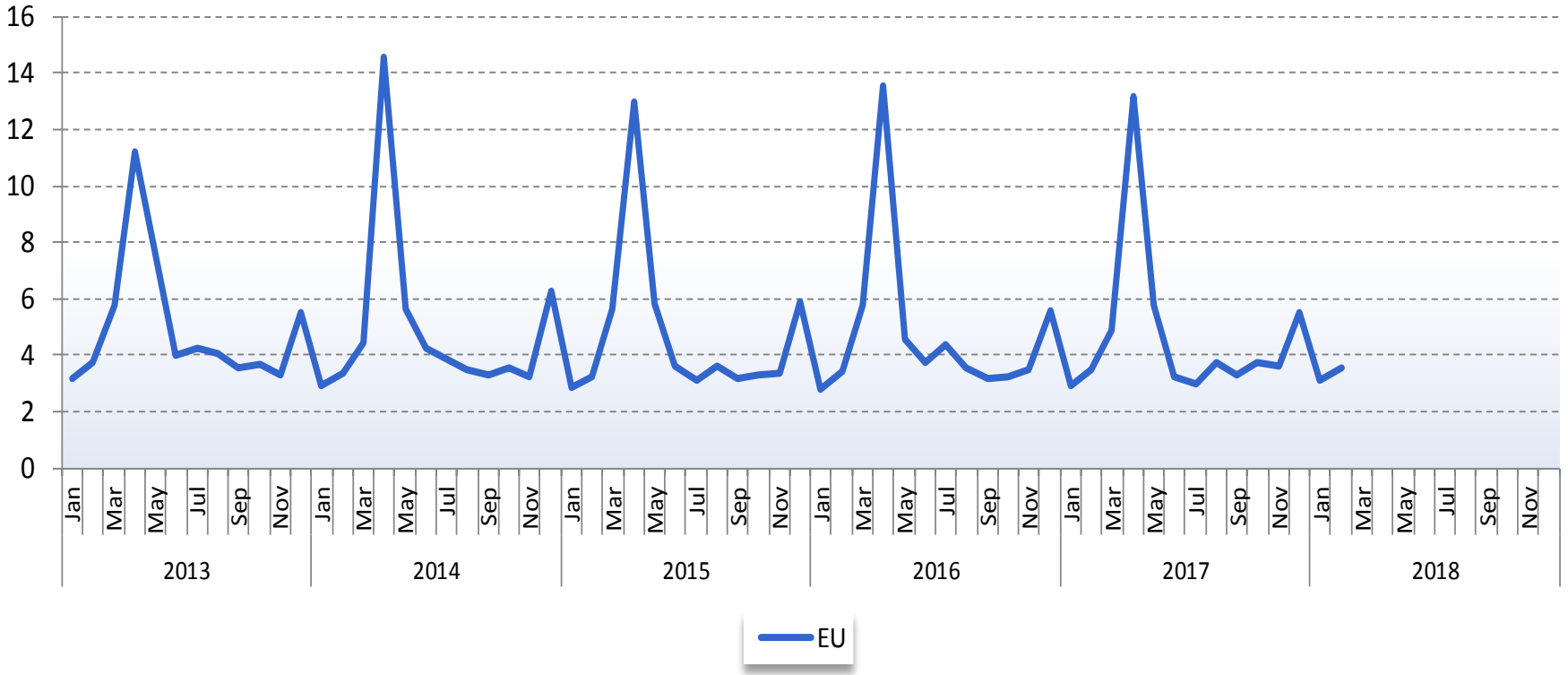


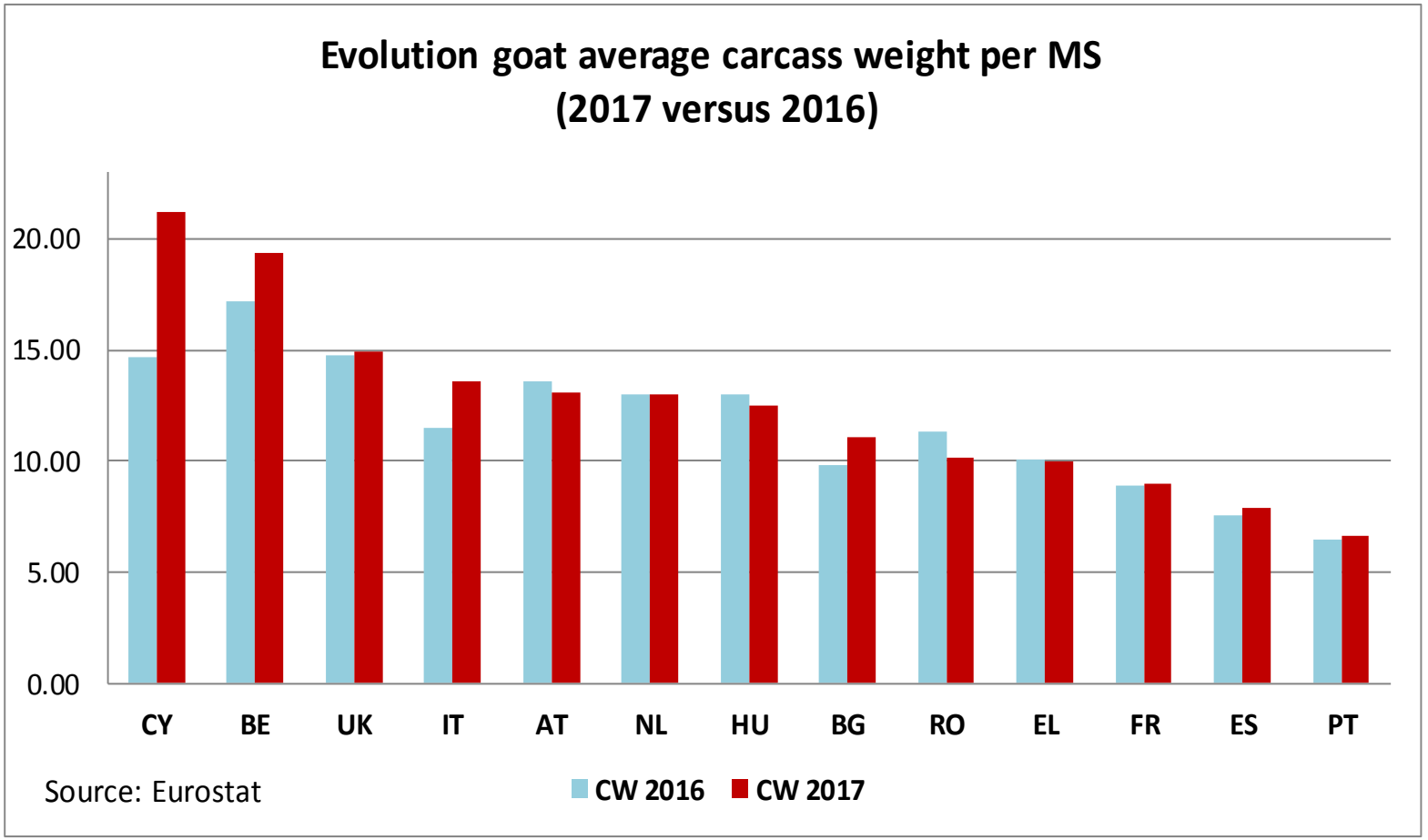
European Commission

EU Goat Meat Producers
('000 tonnes)



Monthly goat slaughtering in the EU (in '000 tonnes)




Evolution goat average carcass weight per MS
(2017 versus 2016)
20.00
15.00
10.00
5.00
0.00
CY
BE
UK
IT
AT
NL
HU
BG
RO
EL
FR
ES
PT
Source: Eurostat
CW 2016
CW 2017

European Commission

Prices

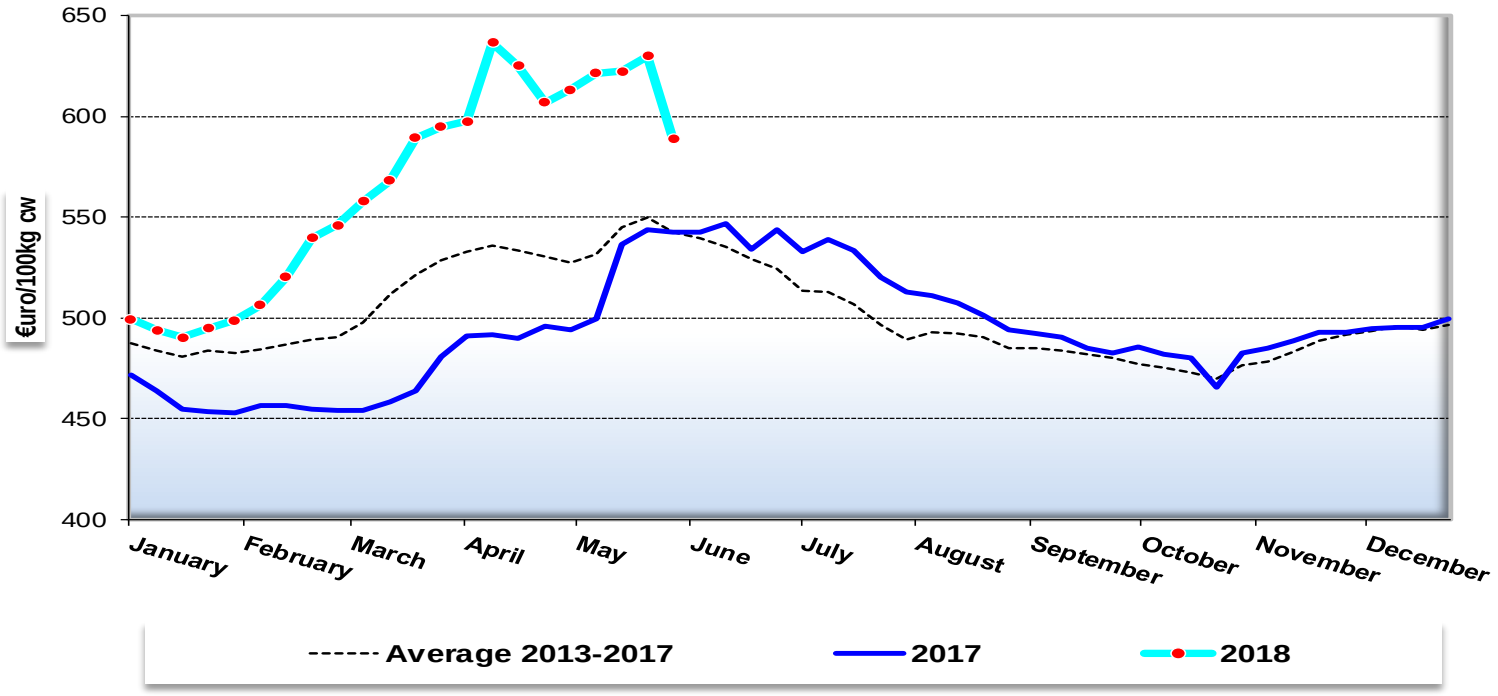
Agriculture and Rural Development

SHEEP PRICES EU EVOLUTION

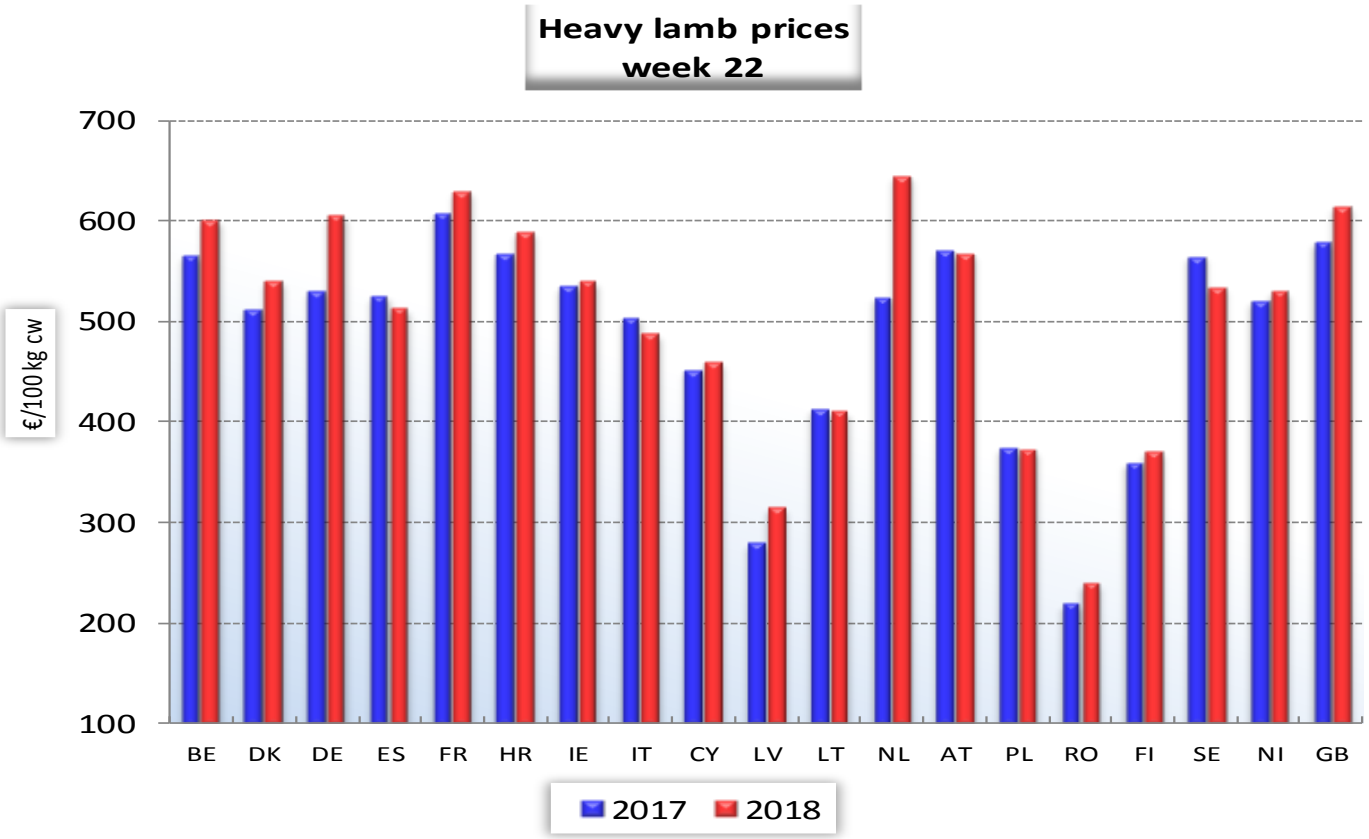
European Commission

Evolution of heavy lamb prices in the EU

Latest price ==> 588.84 EUR/100 kg



SHEEP PRICES EU EVOLUTION

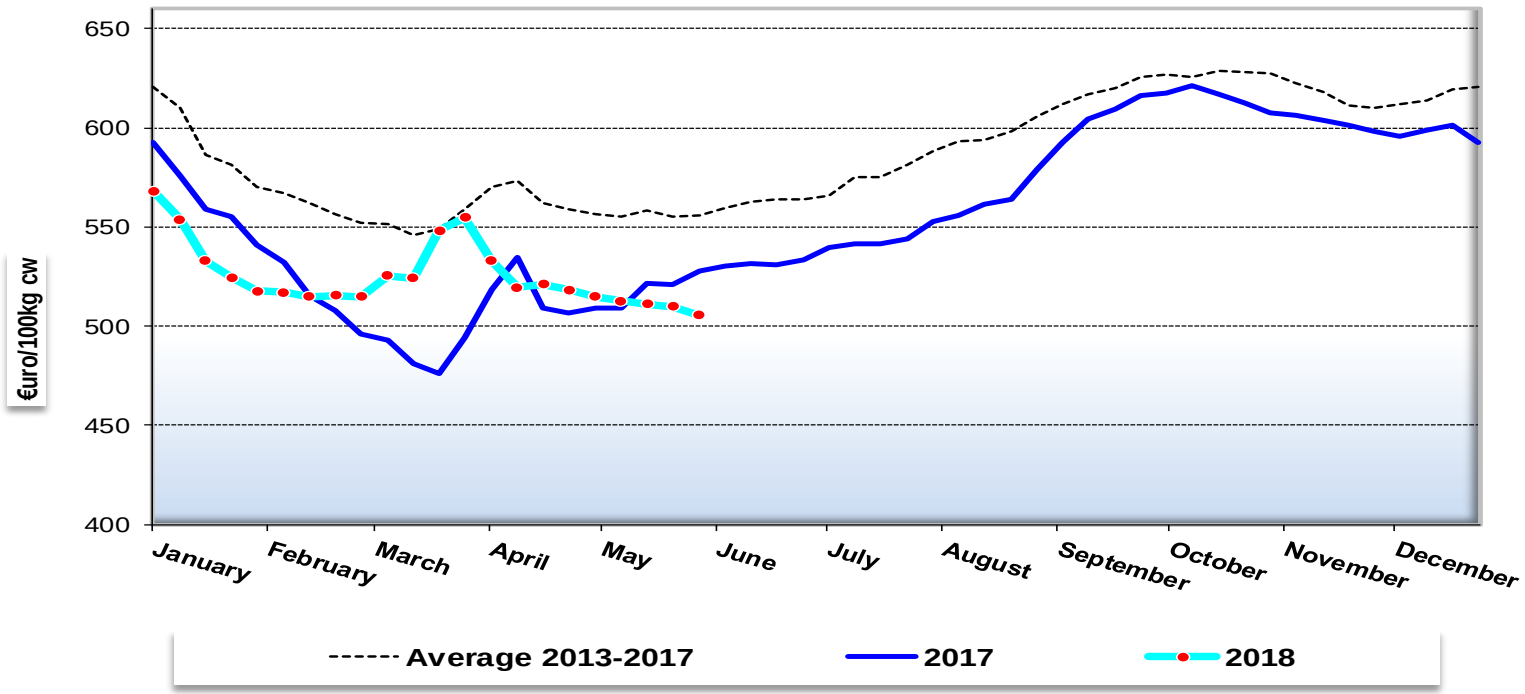


SHEEP PRICES EU EVOLUTION

European Commission

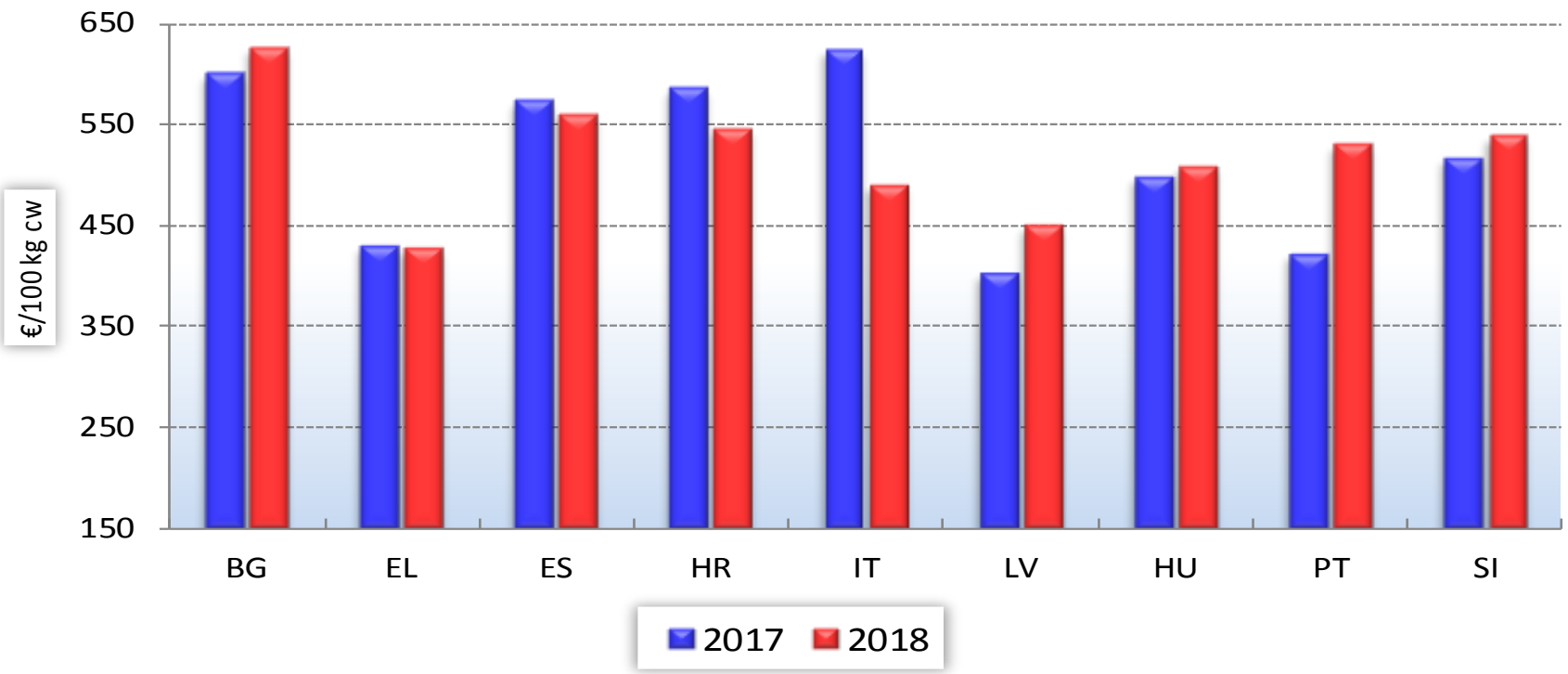
Evolution of light lamb prices in the EU

Latest price ==> 505.60 EUR/100 kg



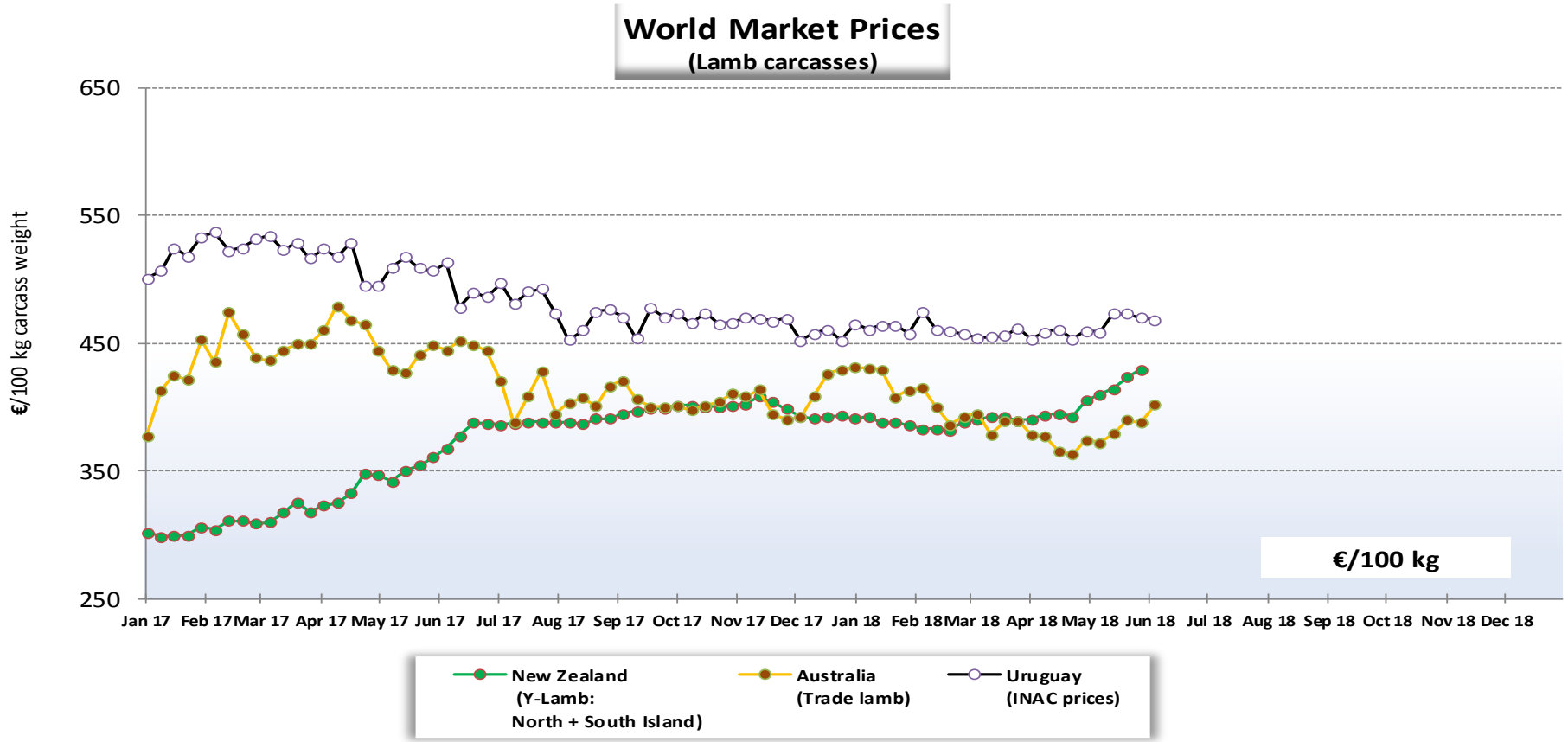
European Commission

Light lamb prices week 22



WORLD MARKET

SHEEP PRICES NZ, AUS, UY.



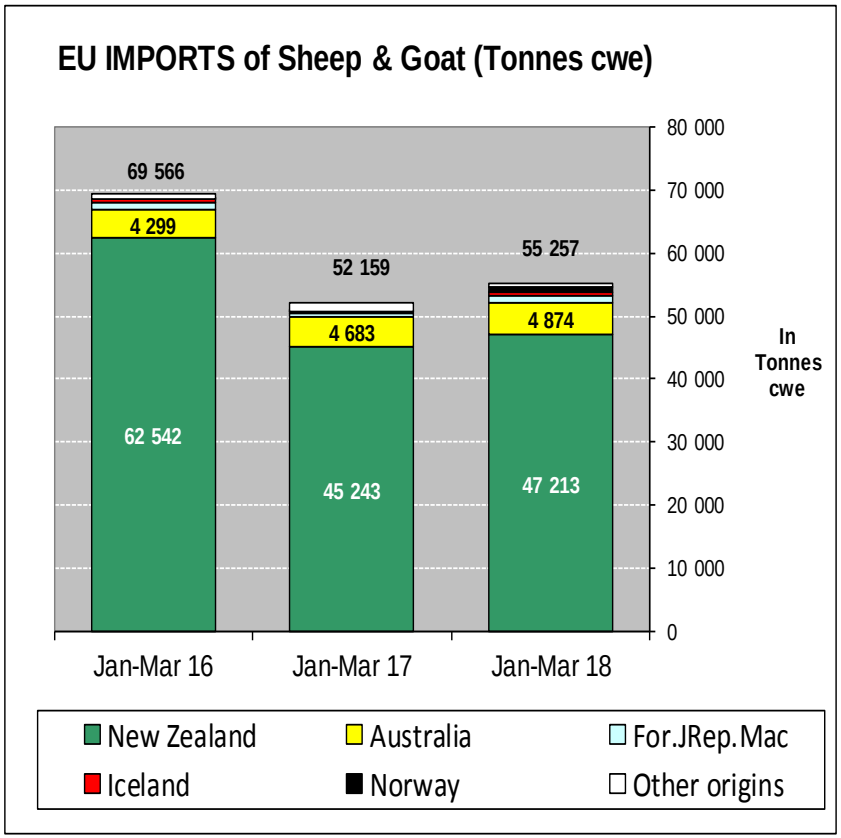
European Commission

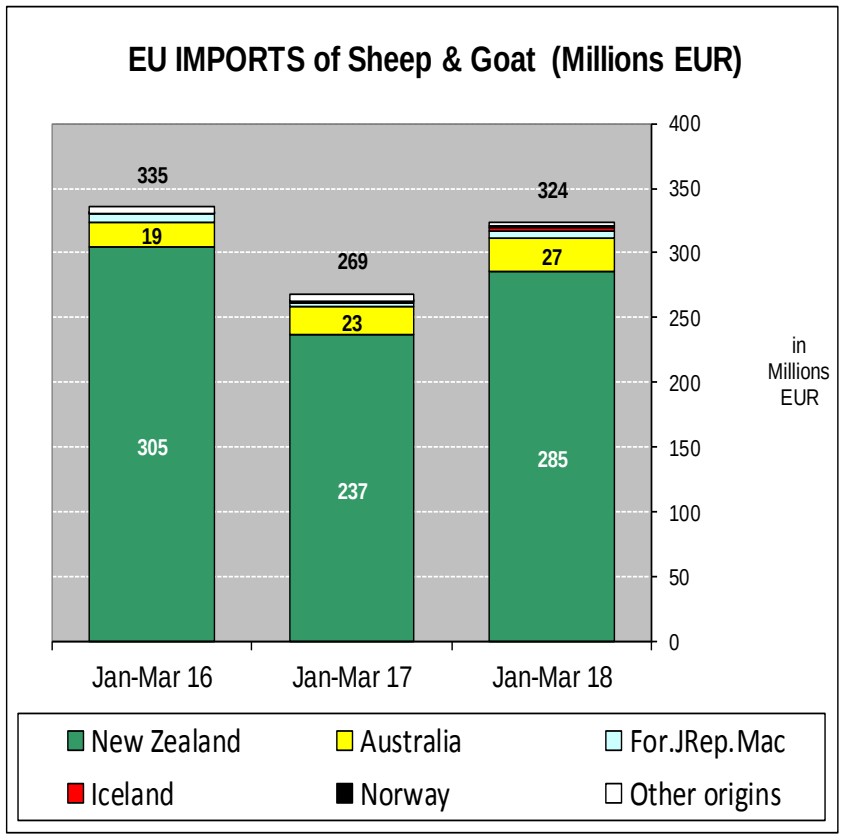
Trade

Agriculture and Rural Development

EU imports of sheep & goatmeat and live animals

Trade figures (COMEXT)





UTILISATION OF SHEEPMEAT AND GOATMEAT TARIFF QUOTAS IN 2018

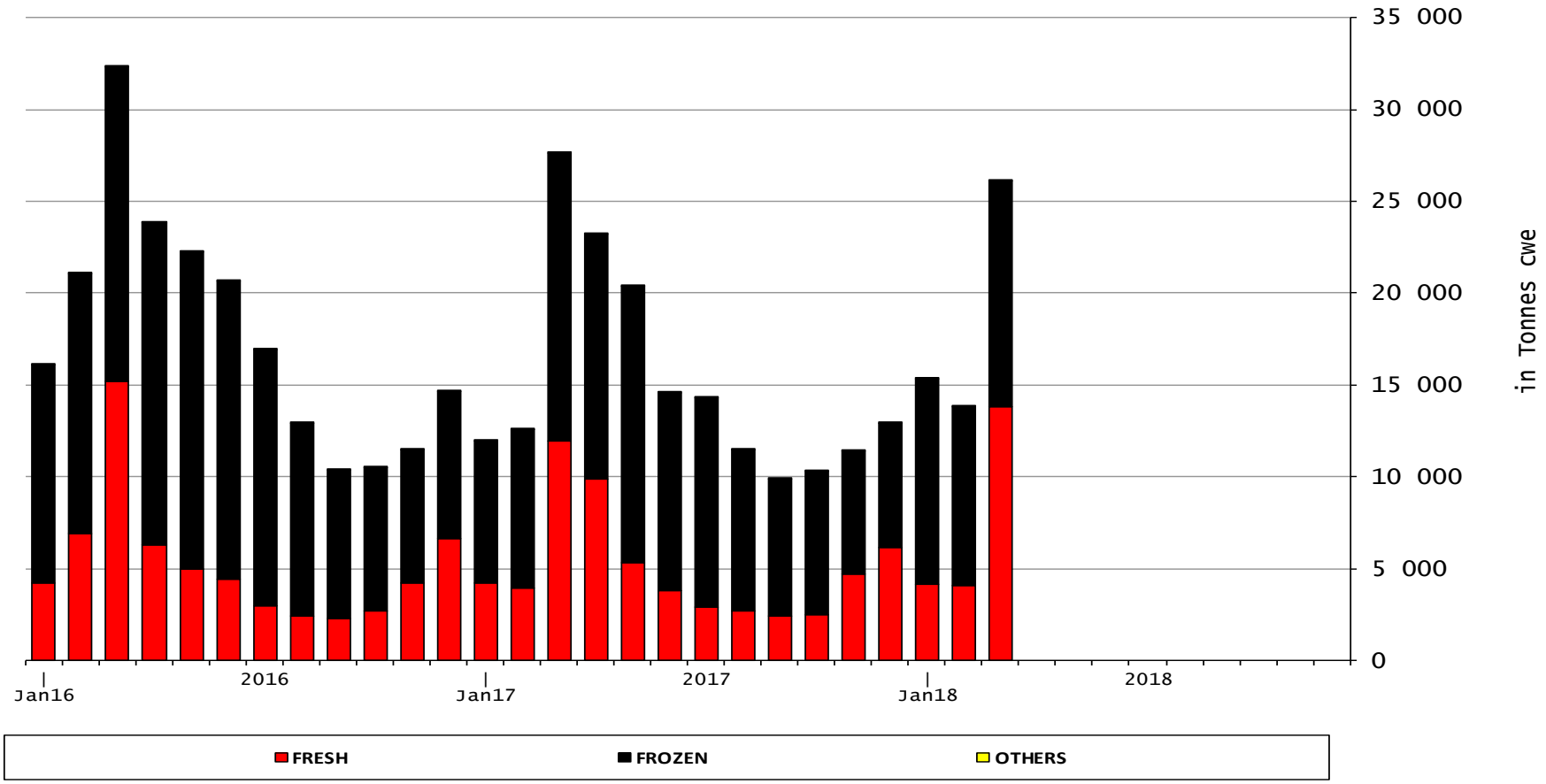
EU-28 : January > December 2018

Reg. 1354/2011

COUNTRY GROUP No	CN CODES	ORIGIN	Period: 01/01/2018 - 04/06/2018 Unit: tonnes cwe				
			Annual quota	Balance (remaining amount)	Actual import	Quota use %	Period: 01/01/2017 - 31/12/2017
1	0204	Argentina	23 000	21 975	1 025	4%	703
		Australia	19 186	11 630	7 556	39%	19 186
		New Zealand	228 254	154 402	73 852	32%	142 204
		Uruguay	5 800	5 361	439	8%	1 813
		Chile	8 000	7 056	944	12%	2 031
		Norway	300	0	300	100%	300
		Greenland	100	100	0	0%	0
		Faeroes	20	20	0	1%	1
		Turkey	200	200	0	0%	0
		Others	200	7	193	96%	200
		Erga Omnes	200	0	200	100%	197
2	0204 0210 99 21 0210 99 29 0210 99 60	Iceland	1 850	1 162	688	37%	1 850
3	0104 10 30 0104 10 80 0104 20 90	Erga Omnes	92	92	0	0%	0
TOTAL			**287 202**	**202 006**	**85 196**	**30%**	**168 485**

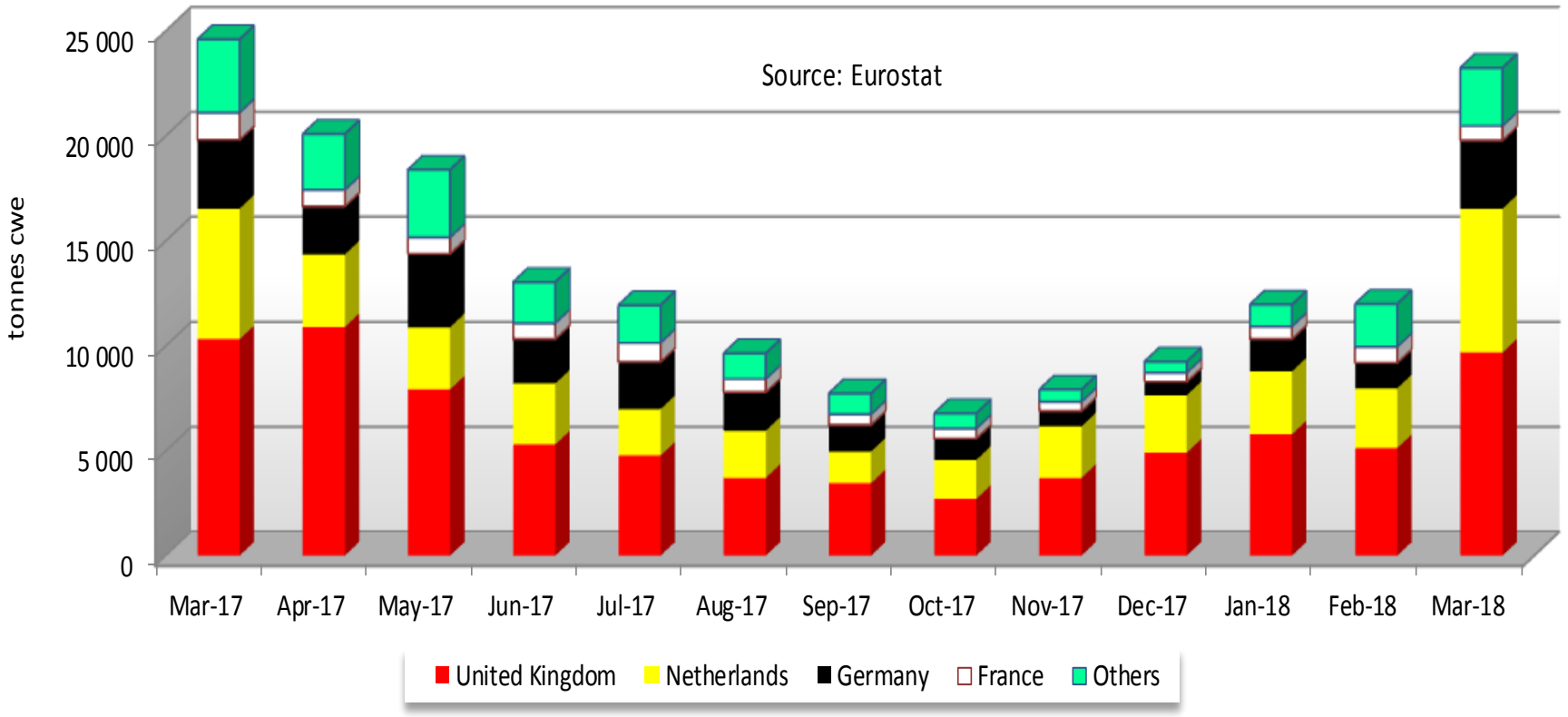
European Commission

EU Imports of Sheep and Goat products



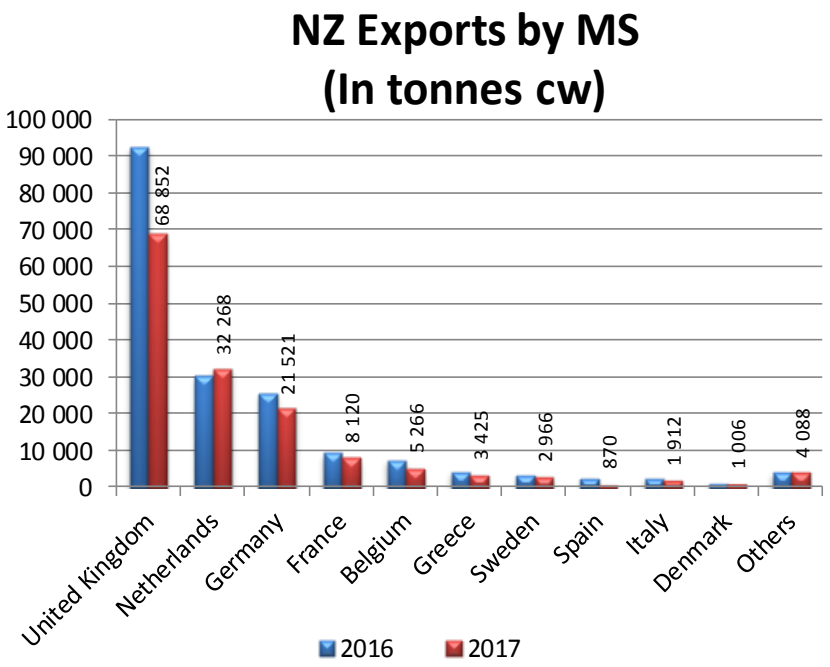
European Commission

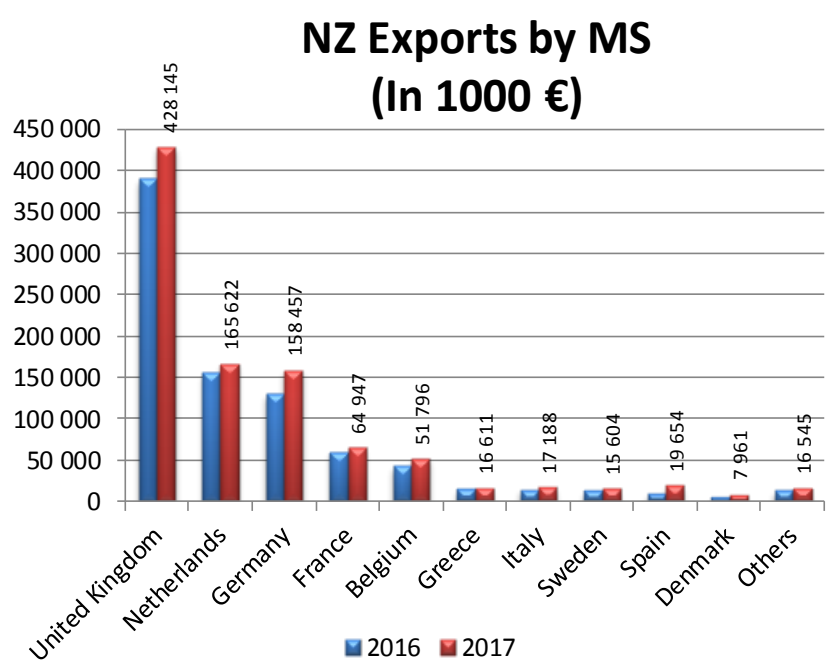
Evolution of NZ exports of sheep meat to the EU



European Commission

Evolution NZ Exports of sheep meat in MS

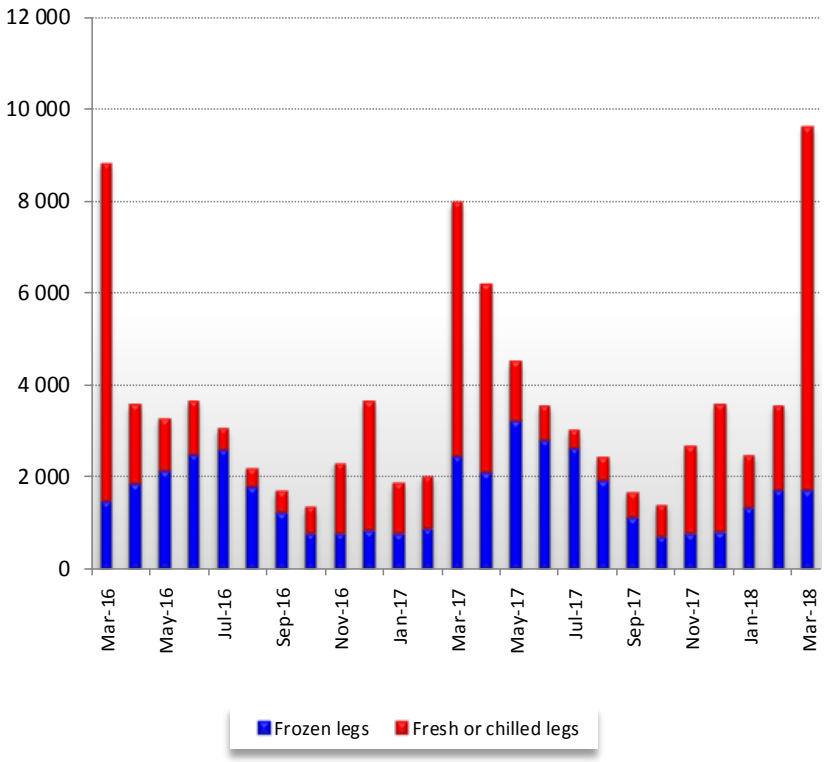




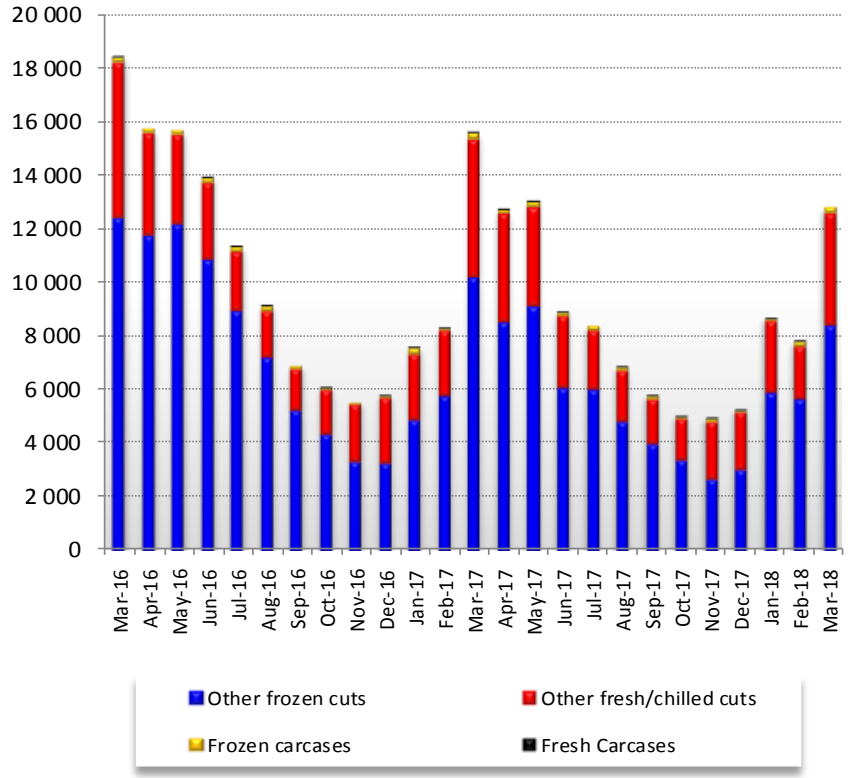
European Commission

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

Sheep legs

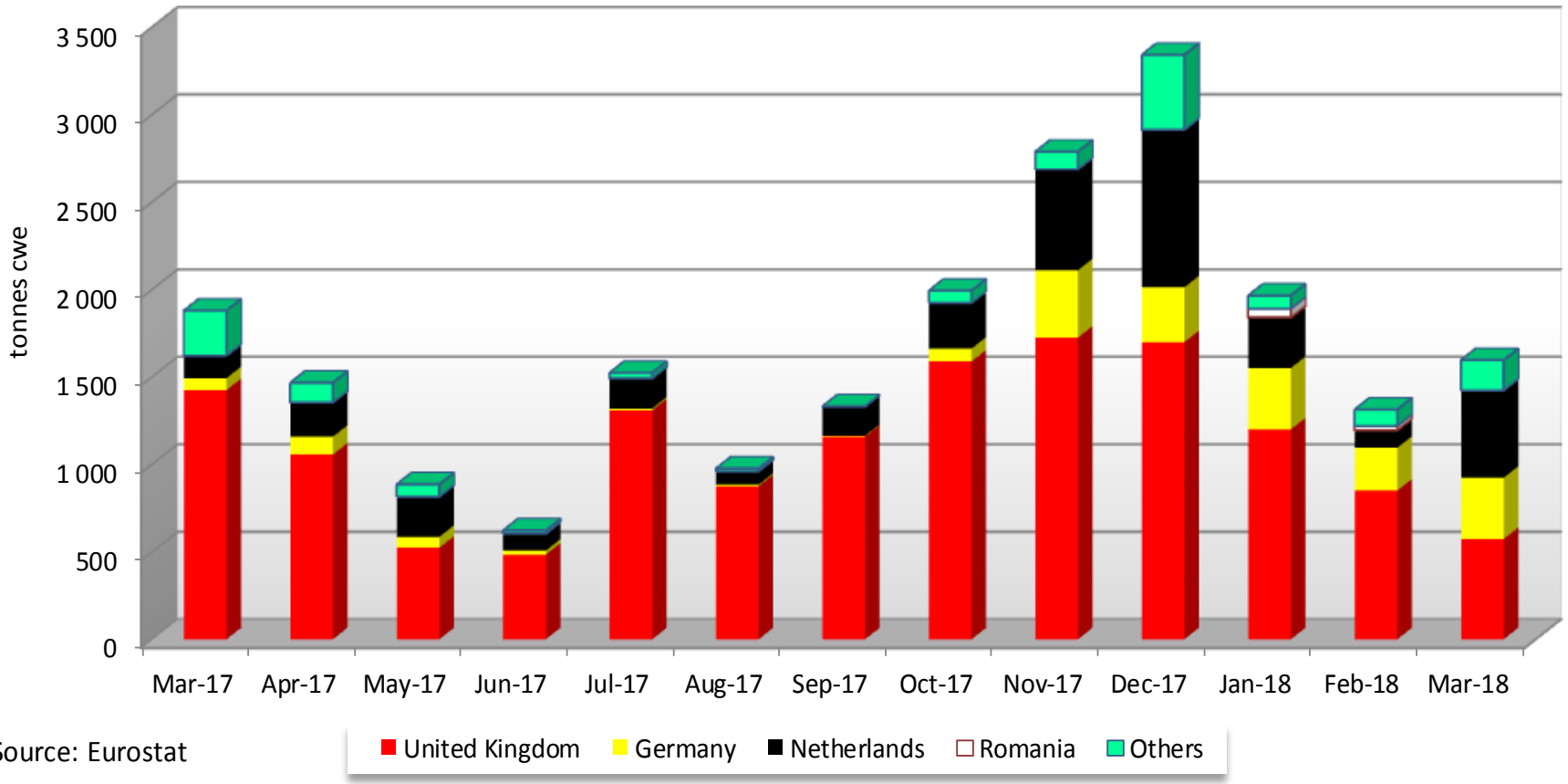


Other meat products



European Commission

Evolution of AUS exports of sheep meat to the EU



Source: Eurostat

EU exports of sheep & goatmeat and live animals

Trade figures (COMEXT)

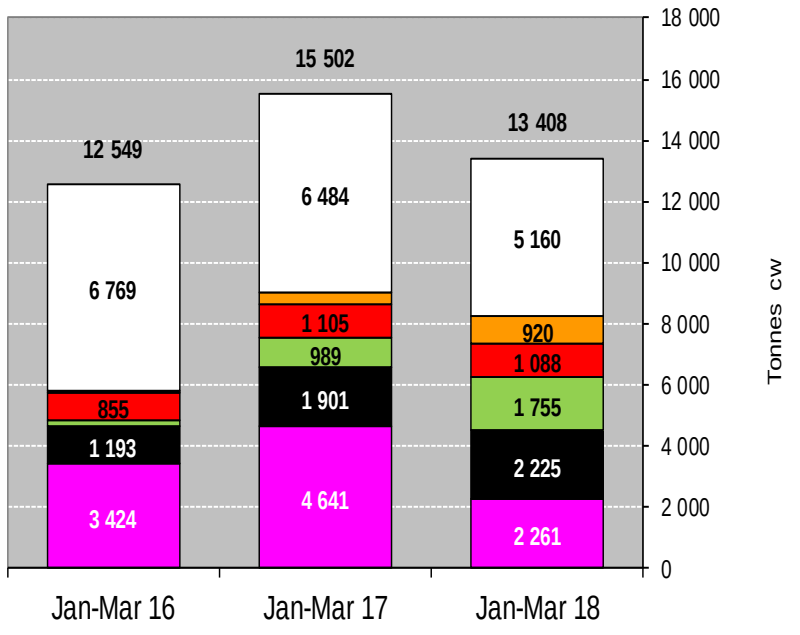
EXPORT

	2014		2015		2016		2017		Jan-Mar 18		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Mar 17
Libya	25 122	33.9%	21 280	33.6%	27 841	35.0%	29 779	32.5%	2 261	16.9%	- 51.3%
Hong Kong	19 375	26.2%	5 643	8.9%	6 203	7.8%	11 924	13.0%	2 225	16.6%	+ 17.0%
Israel	12	0.0%	71	0.1%	3 395	4.3%	4 580	5.0%	1 755	13.1%	+ 77.4%
Switzerland	2 588	3.5%	2 945	4.7%	3 206	4.0%	4 235	4.6%	1 088	8.1%	- 1.6%
Turkey	157	0.2%	552	0.9%	361	0.5%	3 107	3.4%	920	6.9%	+ 141.4%
Lebanon	3 029	4.1%	4 035	6.4%	2 902	3.6%	2 474	2.7%	724	5.4%	+ 28.7%
Oman	143	0.2%	24	0.0%	768	1.0%	925	1.0%	511	3.8%	+ 118.5%
Jordan	7 841	10.6%	14 405	22.8%	18 465	23.2%	13 387	14.6%	461	3.4%	+ 14.7%
Ghana	1 810	2.4%	2 920	4.6%	2 230	2.8%	1 886	2.1%	415	3.1%	- 10.2%
U.A.Emirates	1 096	1.5%	576	0.9%	697	0.9%	2 099	2.3%	306	2.3%	- 66.2%
Gaza + Jericho	0	0.0%	0	0.0%	225	0.3%	180	0.2%	288	2.1%	+++
Ivory Coast	1 350	1.8%	1 164	1.8%	1 610	2.0%	1 408	1.5%	211	1.6%	- 38.0%
Canada	105	0.1%	96	0.2%	465	0.6%	1 329	1.4%	200	1.5%	+ 15.9%
Saudi Arabia	1	0.0%	0	0.0%	62	0.1%	410	0.4%	183	1.4%	+++
Other Destinations	11 431	15.4%	9 554	15.1%	11 194	14.1%	13 975	15.2%	1 861	13.9%	
Extra-EU	74 059		63 265		79 625		91 698		13 408		
% change			- 15%		+ 26%		+ 15%		- 13.5%		

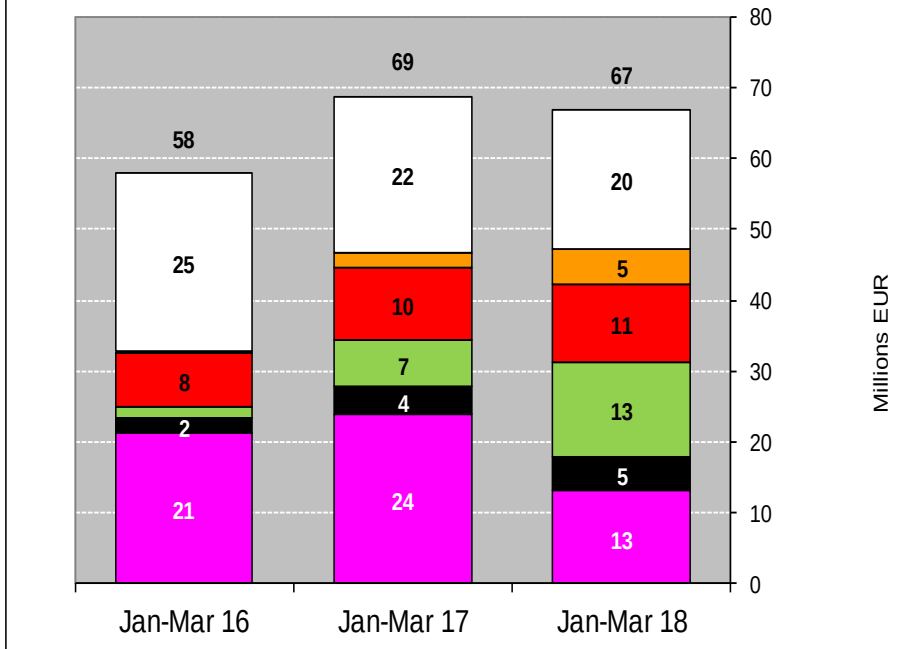
EU exports of sheep & goatmeat and live animals

Trade figures (COMEXT)

EU EXPORTS of Sheep & Goat (Tonnes cwe)

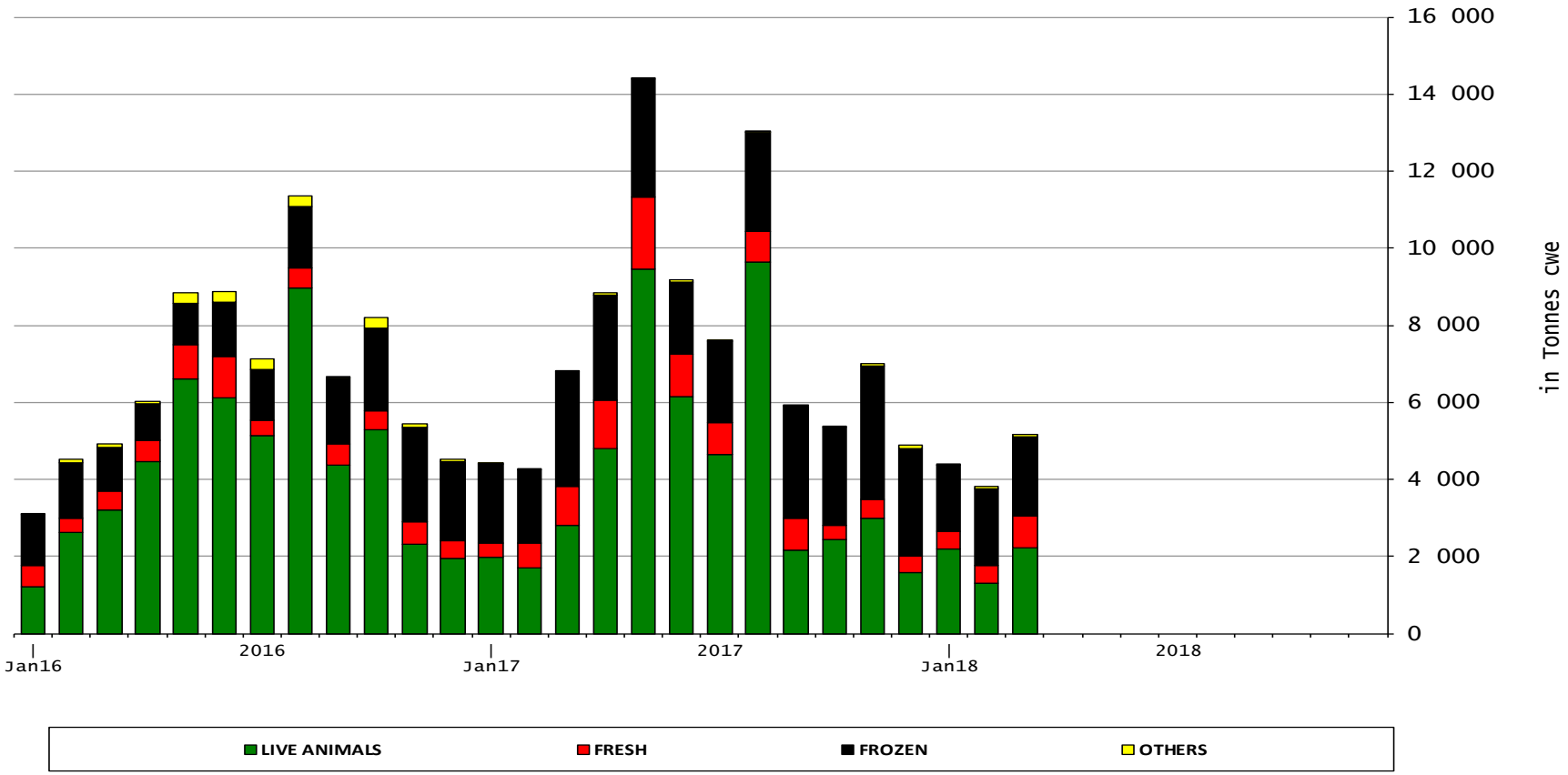


EU EXPORTS of Sheep & Goat (Millions EUR)



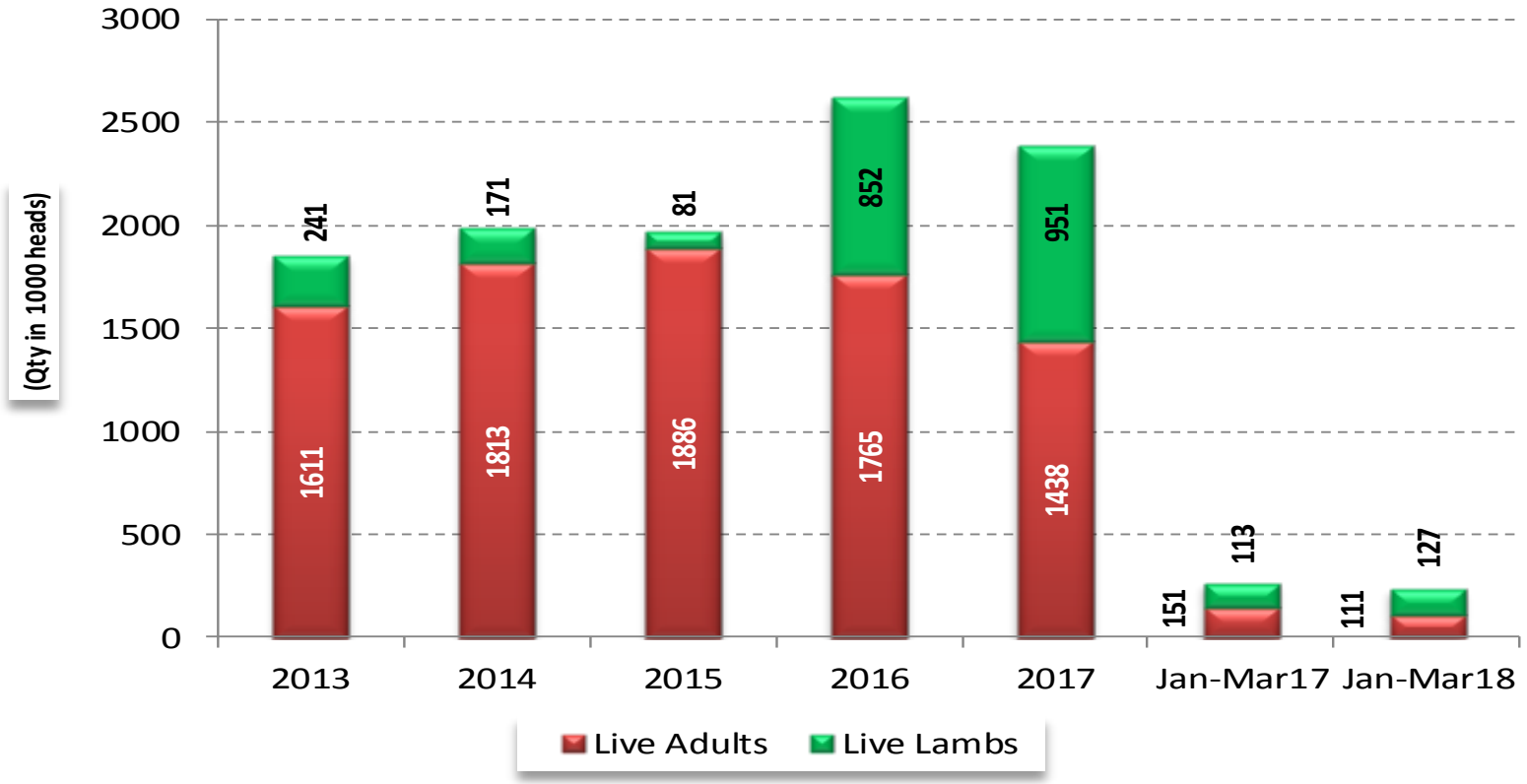
European Commission

EU Exports of Sheep and Goat products



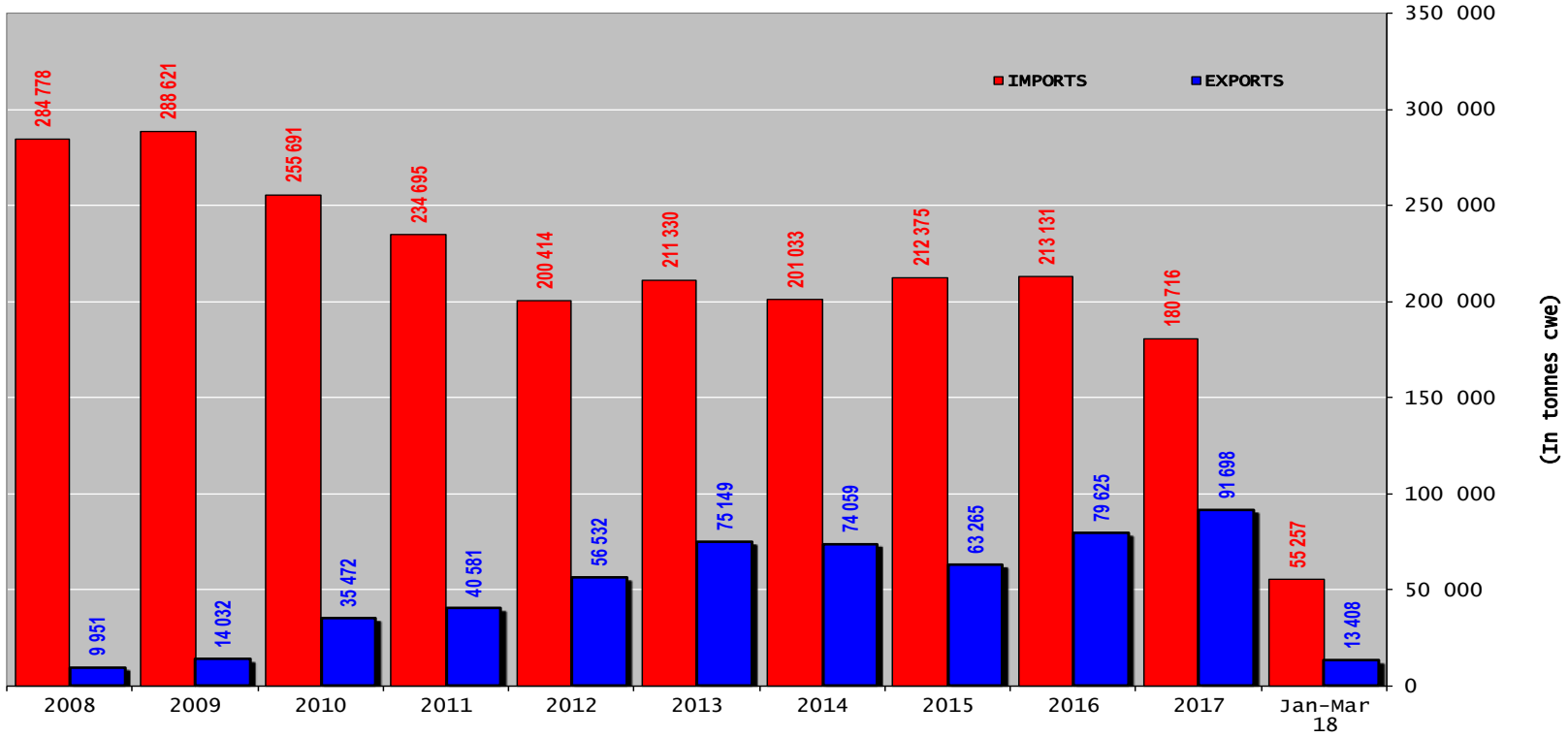
European Commission

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



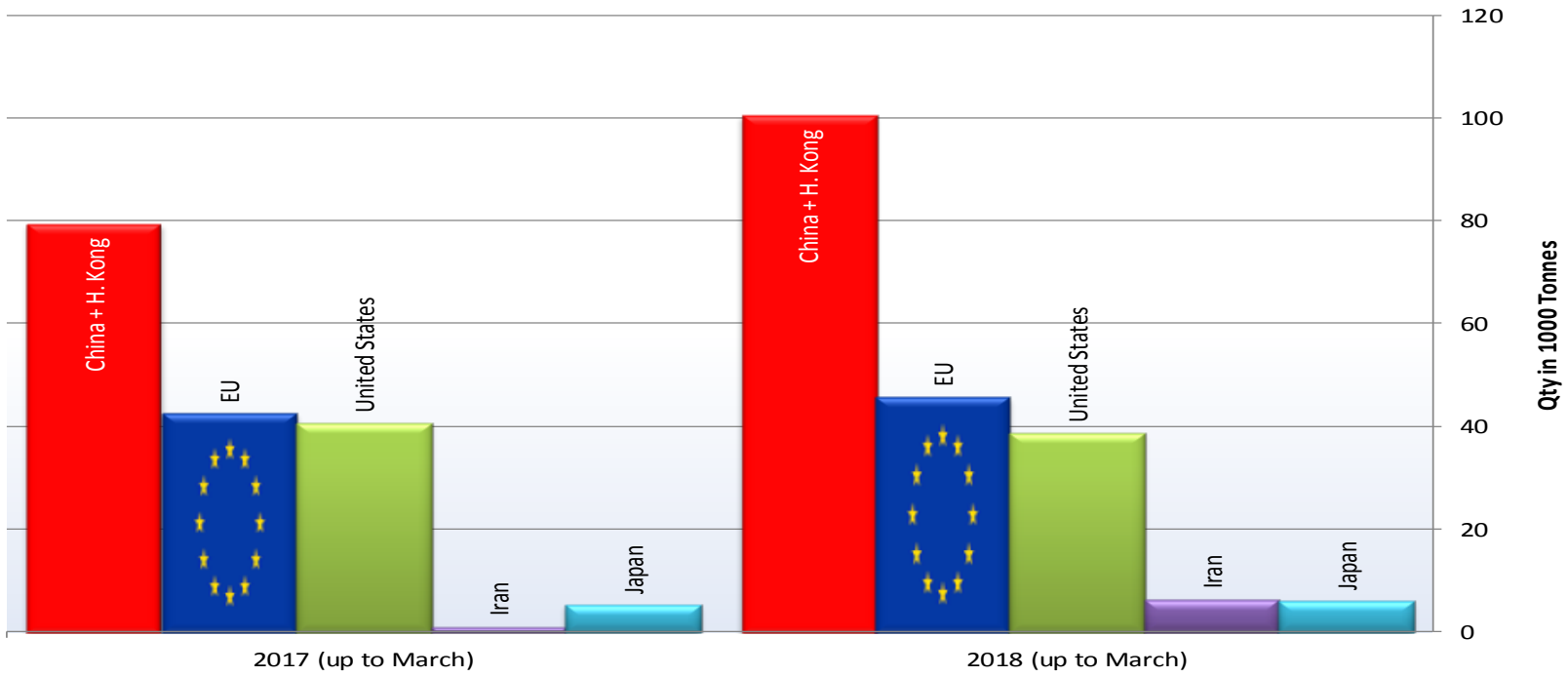
European Commission

Evolution of EU Sheep and Goat Trade Balance



European Commission

Main Importers of SHEEP&GOAT Products (up to March)

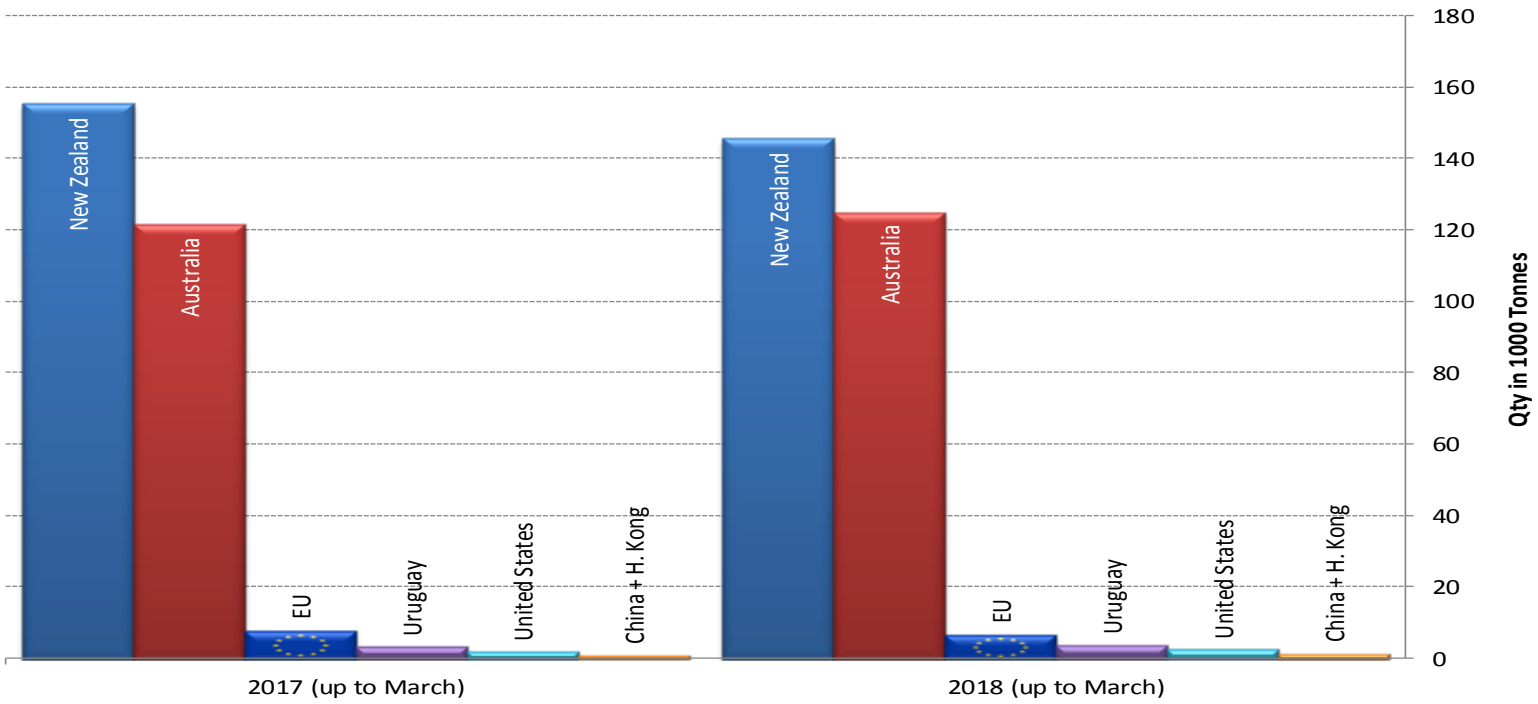


Source : GTA

Excl. Live animals

European Commission

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



Source : GTA

Excl. Live animals

European Commission

Outlook

Agriculture and Rural Development

OUTLOOK

European Commission

SHEEP LIVESTOCK (Thousand Heads)

Estimates of JUNE 2018 working group

	2016	2017	2018(f)	17/16 %	18/17 %
BE	105.0	103.0	102.0	- 1.9%	- 1.0%
BG	1 360.0	1 316.0	1 280.0	- 3.2%	- 2.7%
CZ					
DK					
DE	1 574.0	1 580.0	1 600.0	+ 0.4%	+ 1.3%
EE					
IE	3 438.0	3 470.0	3 460.0	+ 0.9%	- 0.3%
EL	9 216.0	9 000.0	8 900.0	- 2.3%	- 1.1%
ES	12 550.0	12 593.0	12 593.0	+ 0.3%	
FR	7 157.0	6 877.0	6 800.0	- 3.9%	- 1.1%
HR	571.6	564.0	570.0	- 1.3%	+ 1.1%
IT	7 284.9	7 215.4	7 250.0	- 1.0%	+ 0.5%
CY					
LV	107.2	112.3	117.0	+ 4.7%	+ 4.2%
LT	163.6	169.7	169.7	+ 3.7%	
LU					
HU	1 141.0	1 146.0	1 150.0	+ 0.4%	+ 0.3%
MT	11.5	11.7	11.7	+ 1.9%	
NL	783.0	798.0	778.0	+ 1.9%	- 2.5%
AT	378.0	401.0	402.0	+ 6.1%	+ 0.2%
PL	180.0	200.0	260.0	+ 11.1%	+ 30.0%
PT	2 248.0	2 225.0	2 213.0	- 1.0%	- 0.5%
RO	9 875.0	9 773.0	13 000.0	- 1.0%	+ 33.0%
SI					
SK	376.0	365.3	368.0	- 2.8%	+ 0.7%
FI					
SE	578.0	606.0	600.0	+ 4.8%	- 1.0%
UK	14 940.9	15 217.5	13 260.0	+ 1.9%	- 12.9%
EU	74 039	73 744	74 884	- 0.40%	+ 1.55%

GOAT LIVESTOCK (Thousand Heads)

Estimates of JUNE 2018 working group

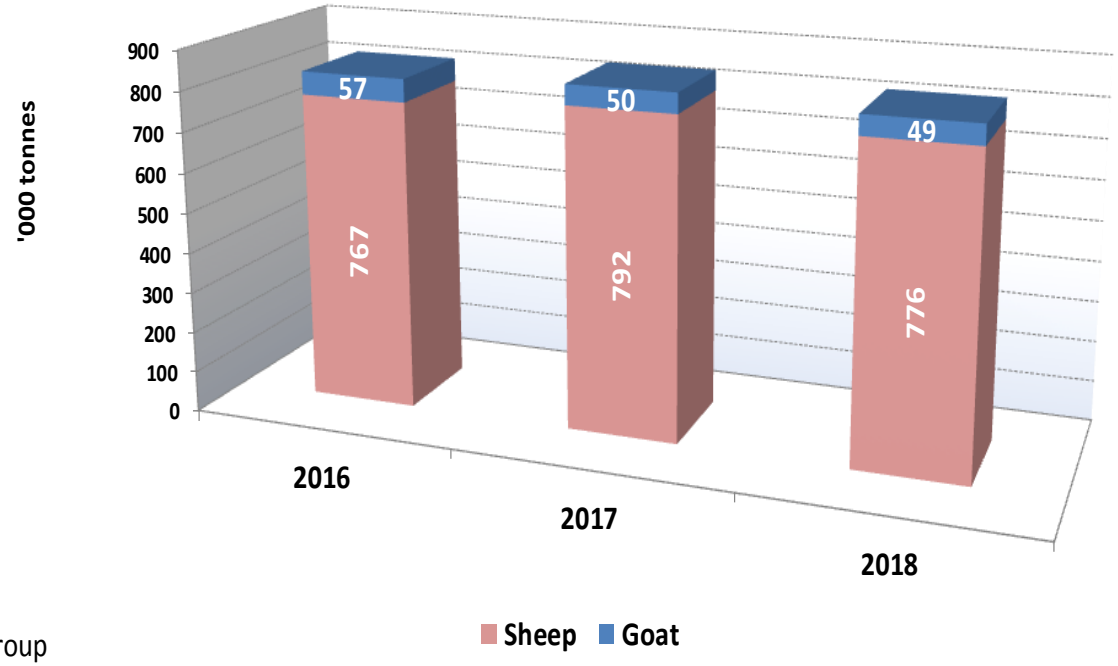
	2016	2017	2018(f)	17/16 %	18/17 %
BE	45.0	51.0	51.0	+ 13.3%	
BG	237.0	256.0	260.0	+ 8.0%	+ 1.6%
CZ					
DK					
DE	139.0	141.0	143.0	+ 1.4%	+ 1.4%
EE					
IE	139.0	141.0	143.0	+ 1.4%	+ 1.4%
EL	4 102.0	4 000.0	3 800.0	- 2.5%	- 5.0%
ES	2 161.0	2 261.0	2 253.0	+ 4.6%	- 0.4%
FR	1 204.0	1 213.0	1 225.0	+ 0.7%	+ 1.0%
HR	66.0	66.1	67.0	+ 0.2%	+ 1.4%
IT	1 026.3	1 003.0	1 020.0	- 2.3%	+ 1.7%
CY					
LV	13.7	12.9	13.2	- 5.5%	+ 2.0%
LT	13.4	14.3	14.3	+ 6.7%	
LU					
HU	81.0	79.0	79.0	- 2.5%	
MT	5.0	5.2	5.2	+ 3.8%	
NL	499.0	532.0	548.0	+ 6.6%	+ 3.0%
AT	82.0	91.0	91.5	+ 11.0%	+ 0.5%
PL	100.0	100.0	100.0		
PT	347.0	340.0	333.0	- 2.0%	- 2.1%
RO	1 483.0	1 515.0	2 040.0	+ 2.2%	+ 34.7%
SI					
SK	36.0	37.1	37.5	+ 3.1%	+ 1.1%
FI					
SE					
UK	23.0	21.0	21.0	- 8.7%	
EU	11 802	11 880	12 245	+ 0.65%	+ 3.07%

Red background: Eurostat data

OUTLOOK

Sheep + goat net production (Foreseen from WG* experts)

Missing expert data from :



(*) Working Group

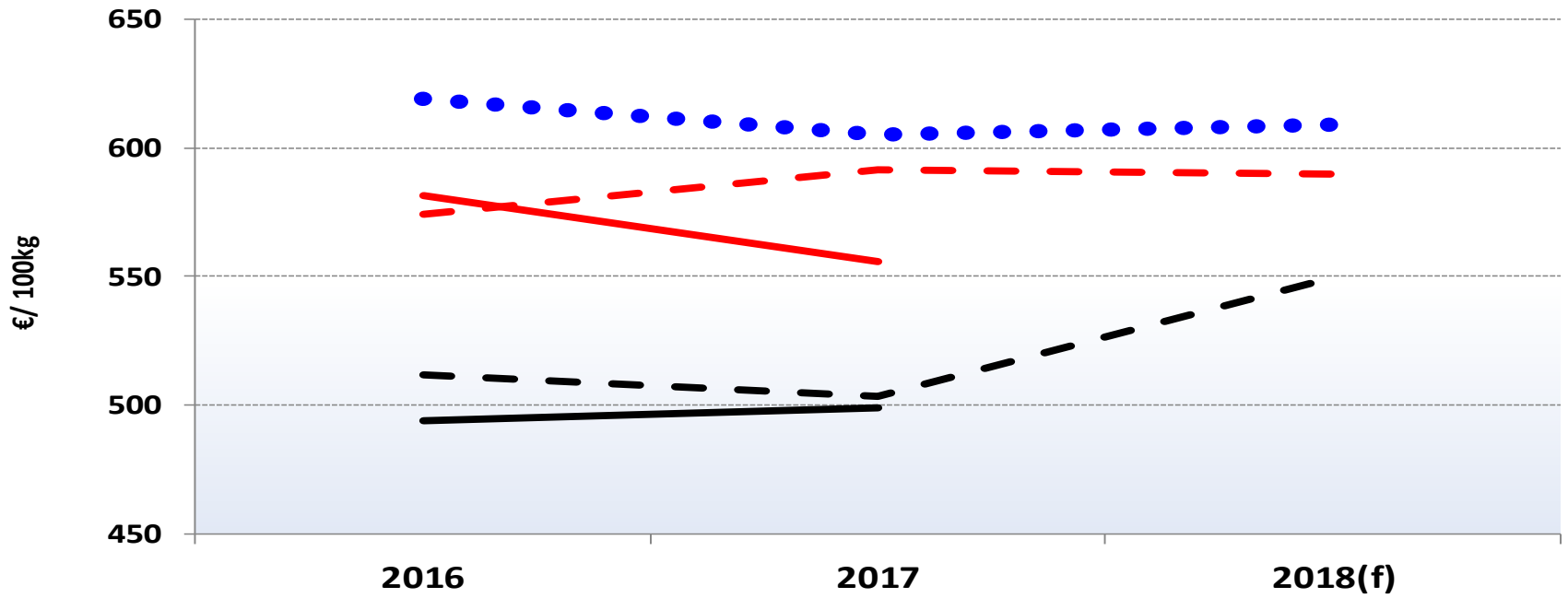
OUTLOOK

European Commission

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

Missing expert data from :

(*) Working Group



HEAVY / LIGHT SHARE

European Commission

MS	Price reporting		Coefficient production share	
	Heavy (≥ 13 kg CW)	Light (< 13 kg CW)	Heavy (**)	Light (**)
BE	x		1.00	0.00
BG		x	0.02	0.98
CZ			0.00	0.00
DK	x		1.00	0.00
DE	x		0.98	0.02
EE	x	x	0.98	0.02
EL		x	0.01	0.99
ES	x	x	0.33	0.67
FR	x		0.98	0.02
HR	x	x	0.20	0.80
IE	x		1.00	0.00
IT	x	x	0.06	0.94
CY	x		1.00	0.00
LV	x	x	0.80	0.20
LT	x		1.00	0.00
LU			0.00	0.00
HU		x	0.15	0.85
MT			0.00	0.00
NL	x		1.00	0.00
AT	x		0.99	0.01
PL	x	x	0.96	0.04
PT		x	0.35	0.65
RO	x	x	0.95	0.05
SI		x	0.00	1.00
SK		x	0.01	0.99
FI	x		1.00	0.00
SE	x		0.95	0.05
UK	x		1.00	0.00

(**) Estimated by experts of the sheep working group.

Information not available or reported.
Confirmed by MS
Confirmed by WG

European Commission

Follow market updates via the Dashboard

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