



The EU pigmeat market

Current situation and future prospects

Judit KROMMER

European Commission, DG AGRI

Rakvere, 22 November 2019

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Euroopa investeeringud
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Some key figures of EU pig production

- **Pig population:** 148 million pigs (2018)
- **Production:** 23.8 million tonnes carcass weight of pigmeat (2018)
- **Self sufficiency:** 112%.
- **Exports:** 2.3 million tonnes carcass weight (11% of EU pigmeat production), *processed products and offals excluded.*

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The importance of the EU pig sector

- **Pigmeat** represents **50%** of total EU meat production.
- **Pigmeat** is the **most exported** out of all the meats produced in the EU. Pigmeat exports represent **58% of EU total meat exports** (2017 data).

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EU: an important player in the global pork market

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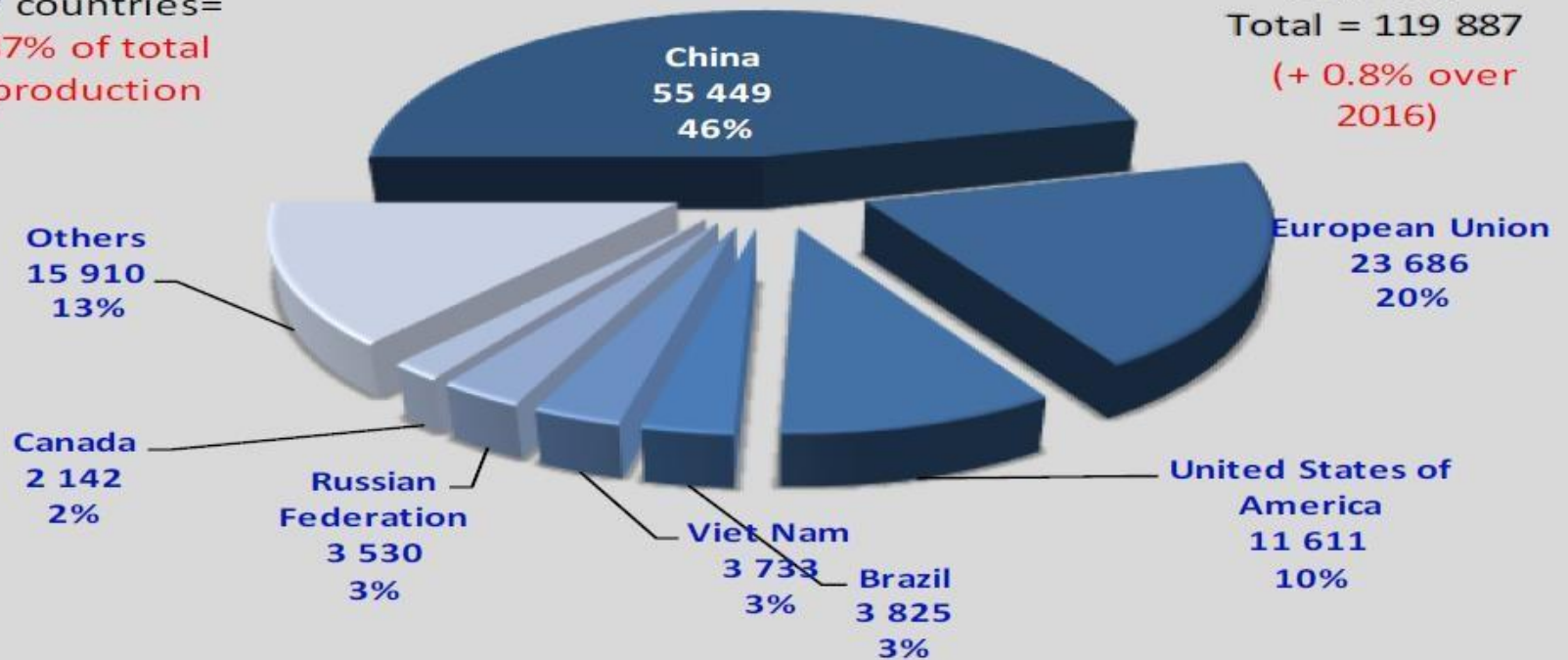
WORLD PIG PRODUCERS



Main Producers of Pigmeat (In 1000 tonnes product weight)

7 countries=
87% of total
production

Year 2017
Total = 119 887
(+ 0.8% over
2016)



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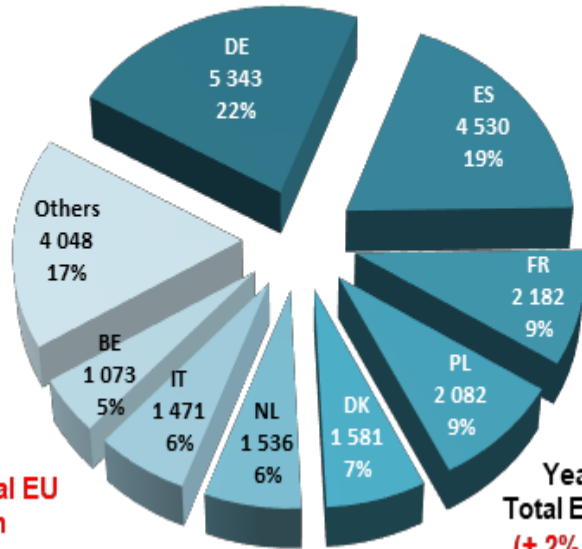


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EU Main Producers

(1000 Tonnes product weight)

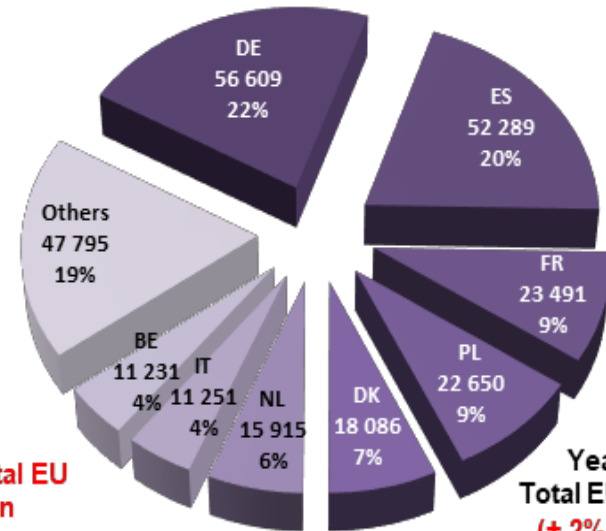


8 MSs =
83% of total EU
production

Year 2018
Total EU = 23 846
(+ 2% over 2017)

EU Main Producers

(1000 Heads)



8 MSs =
82% of total EU
production

Year 2018
Total EU = 259 317
(+ 2% over 2017)

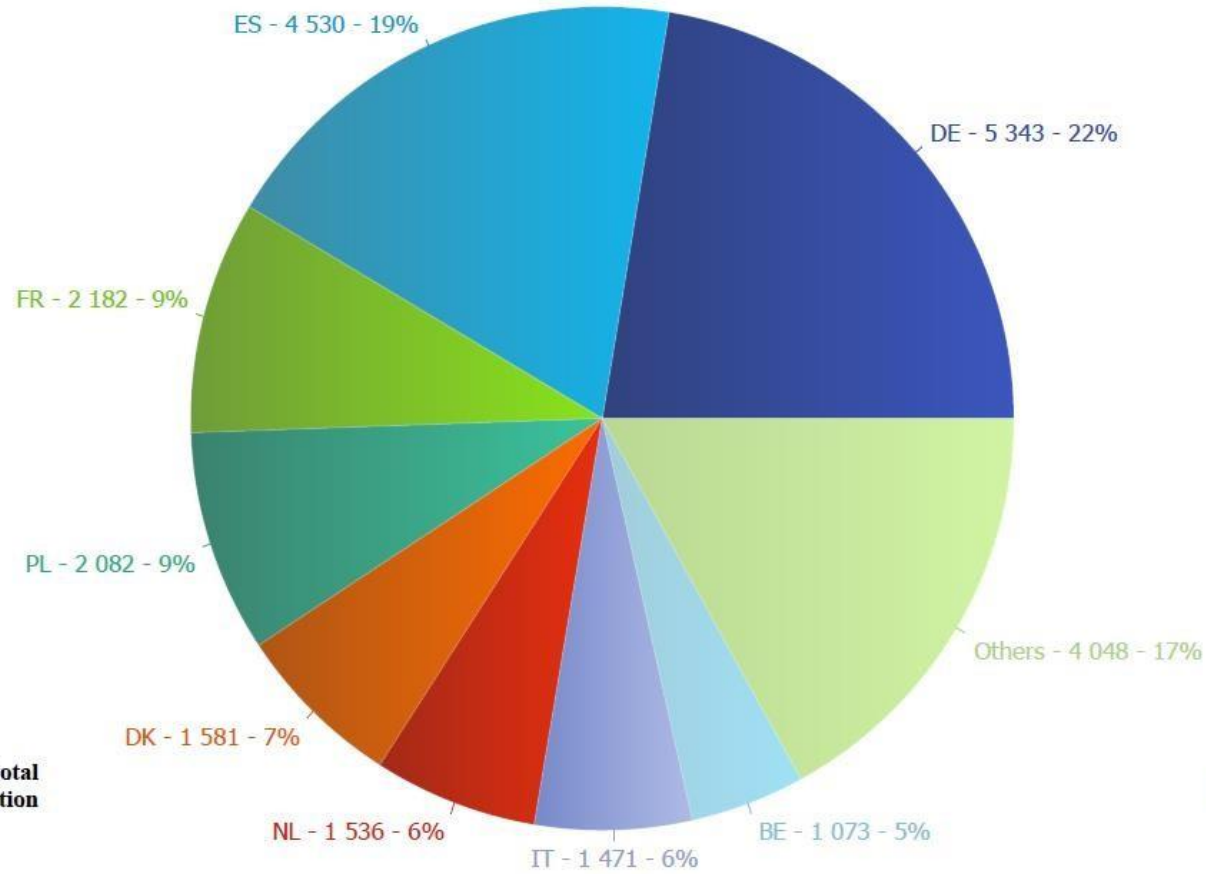
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EU Main Producers (1000 tonnes product weight)



Year 2018
Total EU = 23846
(+2,1% over 2017)

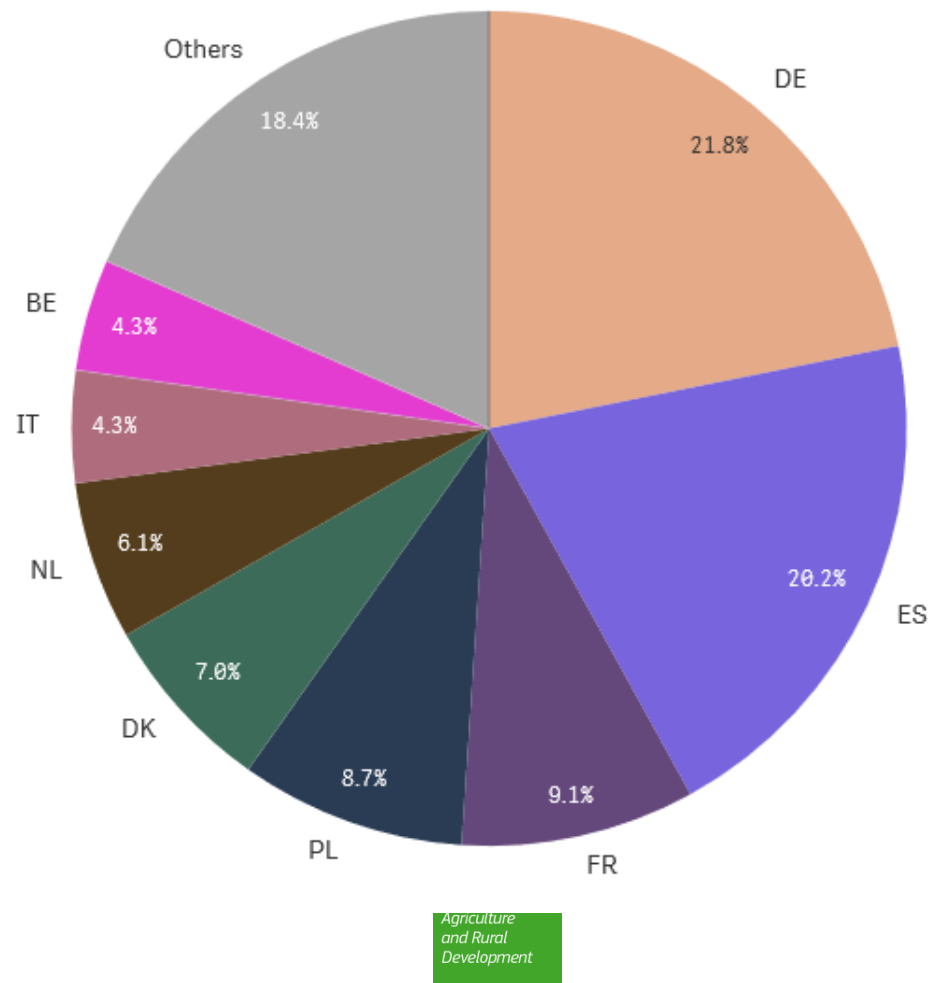
**8 MSs = 83% of total
EU production**

Source: Eurostat

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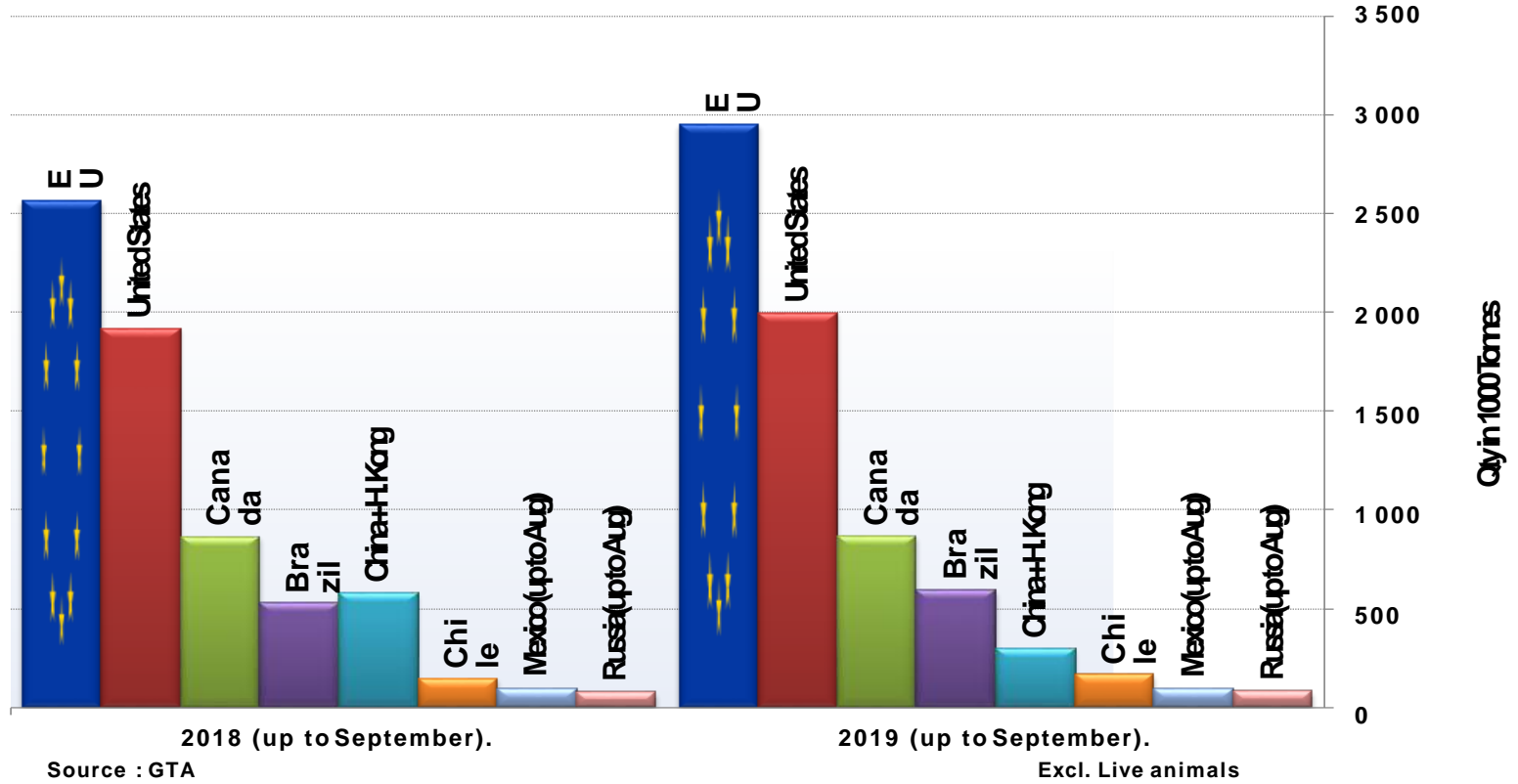


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Main Exporters of PIG Products (up to September).



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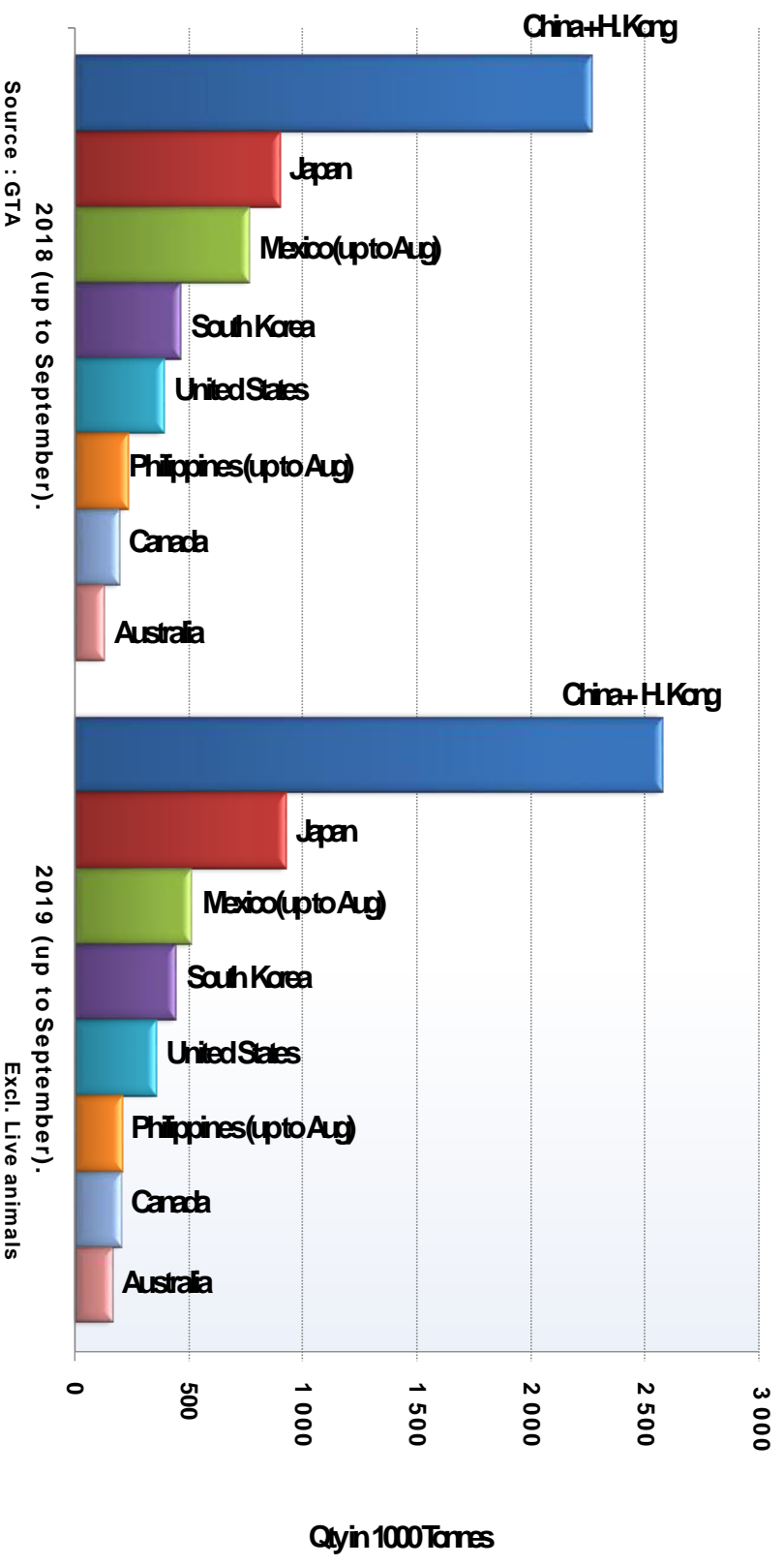


WORLD PIG MARKET

IMPORTS PIG MAIN IMPORTERS



Main Importers of PIG Products (up to September).



Source : GTA

2018 (up to September).

2019 (up to September).

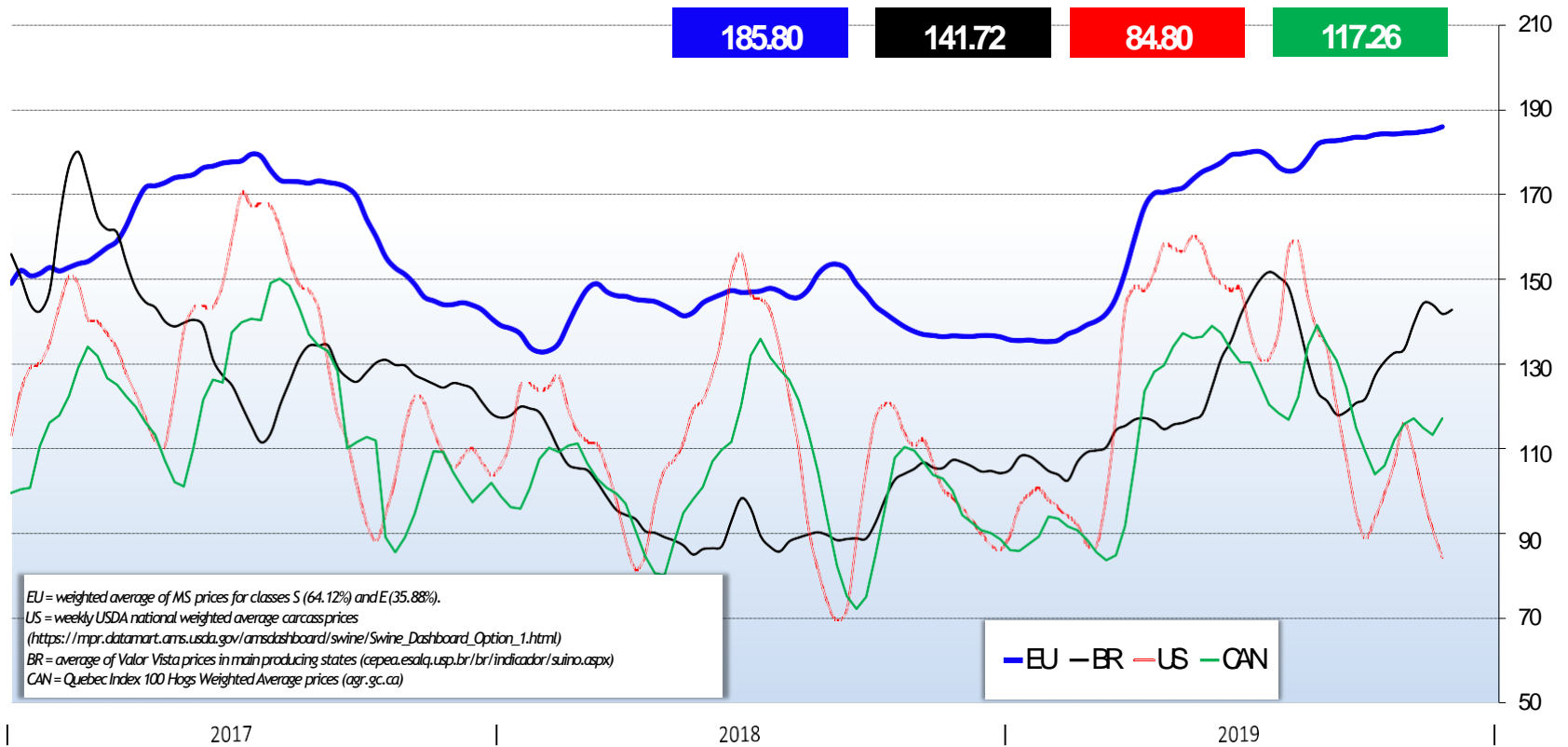
Excl. Live animals

Qty in 1000 Tonnes





World weekly average Pig prices 2016 - 2019 in Euro/100kg carcass (EU, Brazil, Canada and USA)



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Current EU pig market situation

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EU Prices	EU Prices	46	Evolution since last week	Evolution since last month	Evolution since last year
	Average (SE)	1858	+04%	+08%	+362%
	Class S	1865	+08%	+08%	+362%
	Class E	1845	+04%	+09%	+360%
	Fixet	579	+28%	+93%	+637%

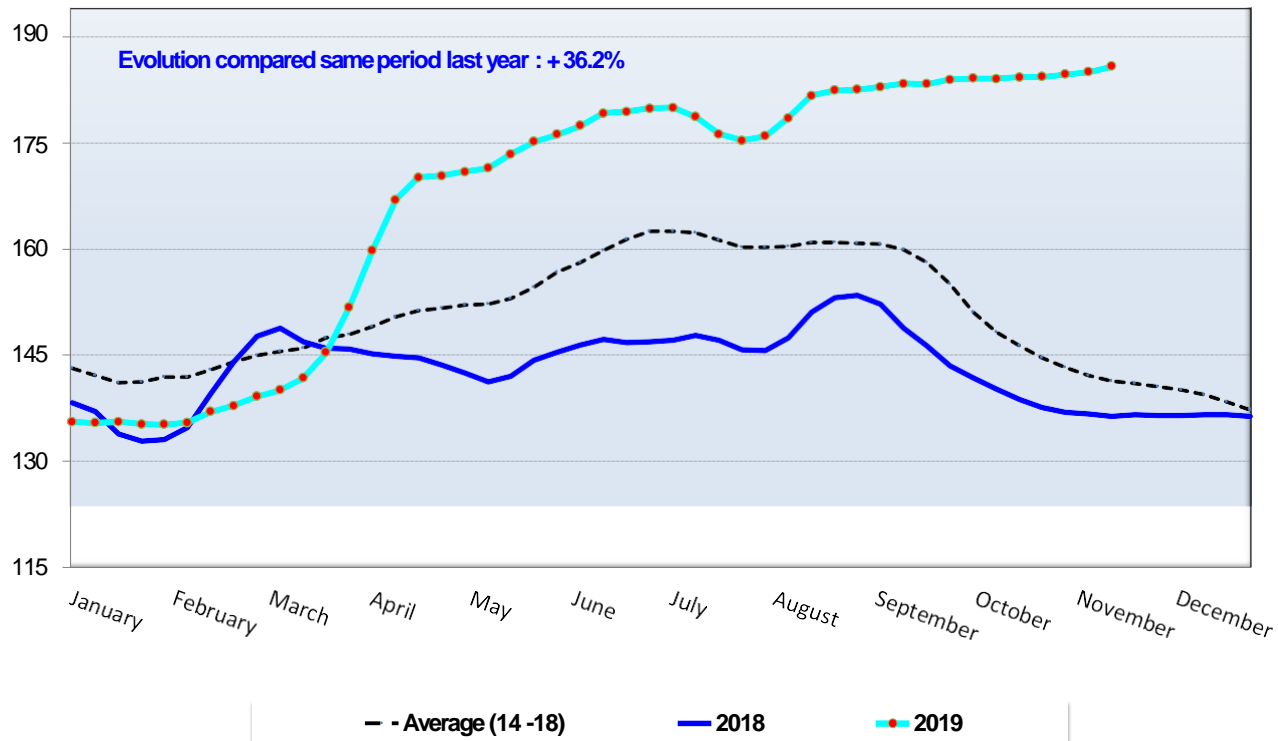
€/100 kg carcass weight

€/head



evolution of the EU pig carcass prices (average class E& S)

Week 46 latest price ==> 185.80 EUR/100 kg/cw



PRICES CARCASSES



EU EVOLUTION

Classe E

	Oct-2018	Oct-2019
EL	172.50	207.96
CY	185.91	202.25
BG	172.30	199.07
SI	153.39	194.84
RO	146.04	193.04
PT	157.87	192.13
HU	144.31	192.02
DE	141.48	190.32
AT	143.38	188.77
SK	145.74	188.40
HR	144.19	185.68
DK	126.89	183.46
FR	131.35	181.00
CZ	138.60	179.82
LV	143.00	179.71
ES	136.13	179.54
IE	139.97	178.62
PL	134.73	178.17
UK	165.23	178.16
LT	135.71	174.24
NL	121.62	172.43
EE	148.28	170.47
SE	164.12	168.05
FI	163.28	165.58
BE	104.47	154.82
EU	138.08	182.74

Classe S

	Oct-2018	Oct-2019
SI	162.05	209.93
EL	172.50	207.96
AT	155.22	200.17
HU	148.41	194.92
DE	144.39	193.75
SK	147.84	193.19
RO	149.26	193.08
PT	156.77	192.90
DK	132.24	190.50
FR	139.35	189.19
HR	146.85	185.79
CZ	142.53	184.92
ES	140.19	181.34
UK	168.2	181.28
PL	137.29	181.08
IE	140.09	179.02
EE	154.64	177.12
LT	139.43	176.75
LV	140.19	176.21
NL	122.76	173.28
SE	168.10	171.50
FI	168.6	170.52
BE	111.67	162.37
EU	140.21	185.06

Classe R

	Oct-2018	Oct-2019
IT	198.04	212.90
LV	115.55	179.36
SK	128.02	177.46
ES	141.16	168.64
DE	114.55	160.31
LT	125.89	158.83
FI	138.92	134.06
UK	125.83	121.55
DK	97.59	
EU	165.86	207.54

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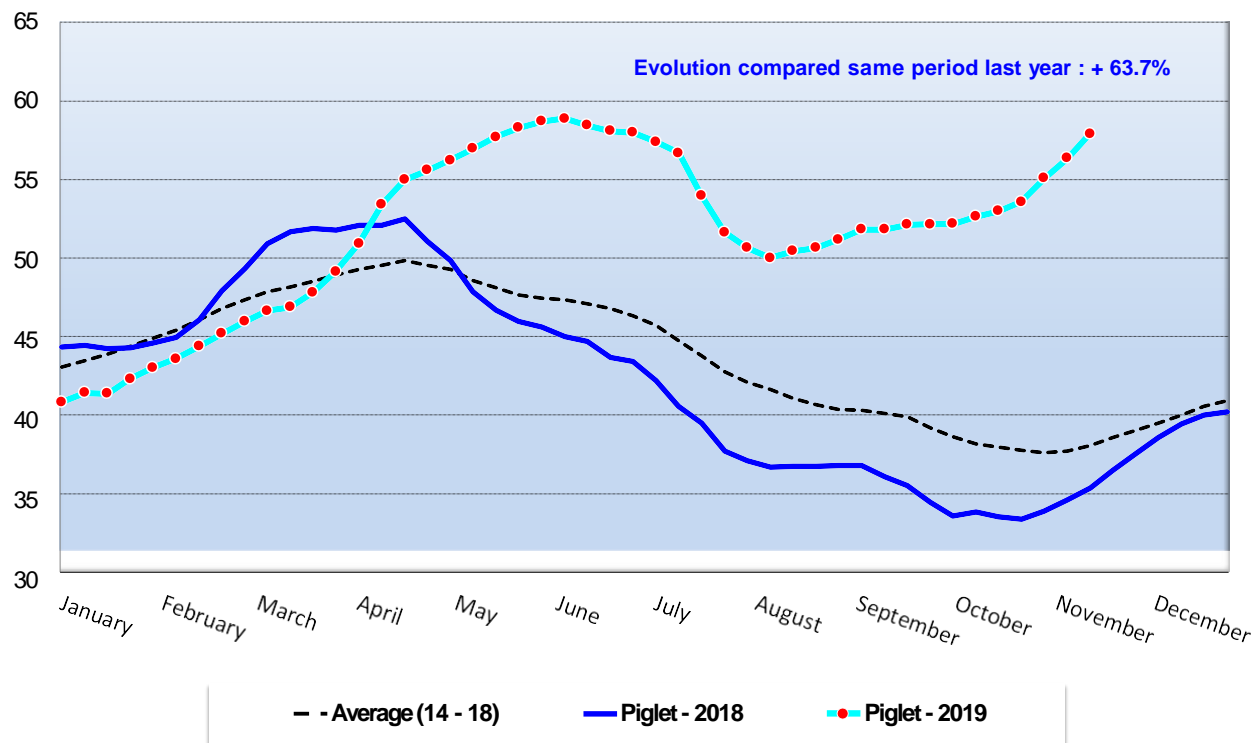


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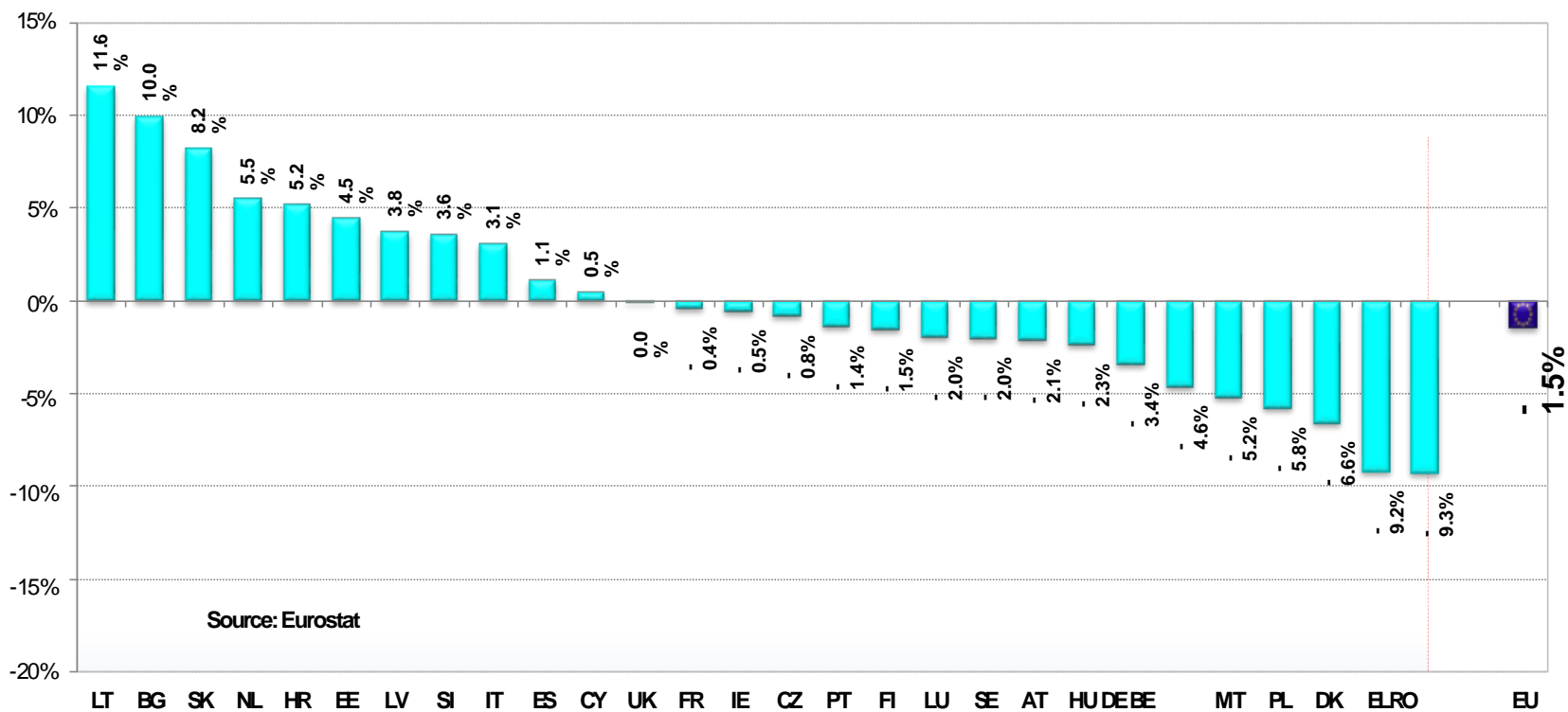
evolution of the EU average piglet prices (€/head)

Week 46 latest price ==> 57.90EUR/head





Change in Pig Slaughter ('000 Heads) 2019/2018 (up to August)



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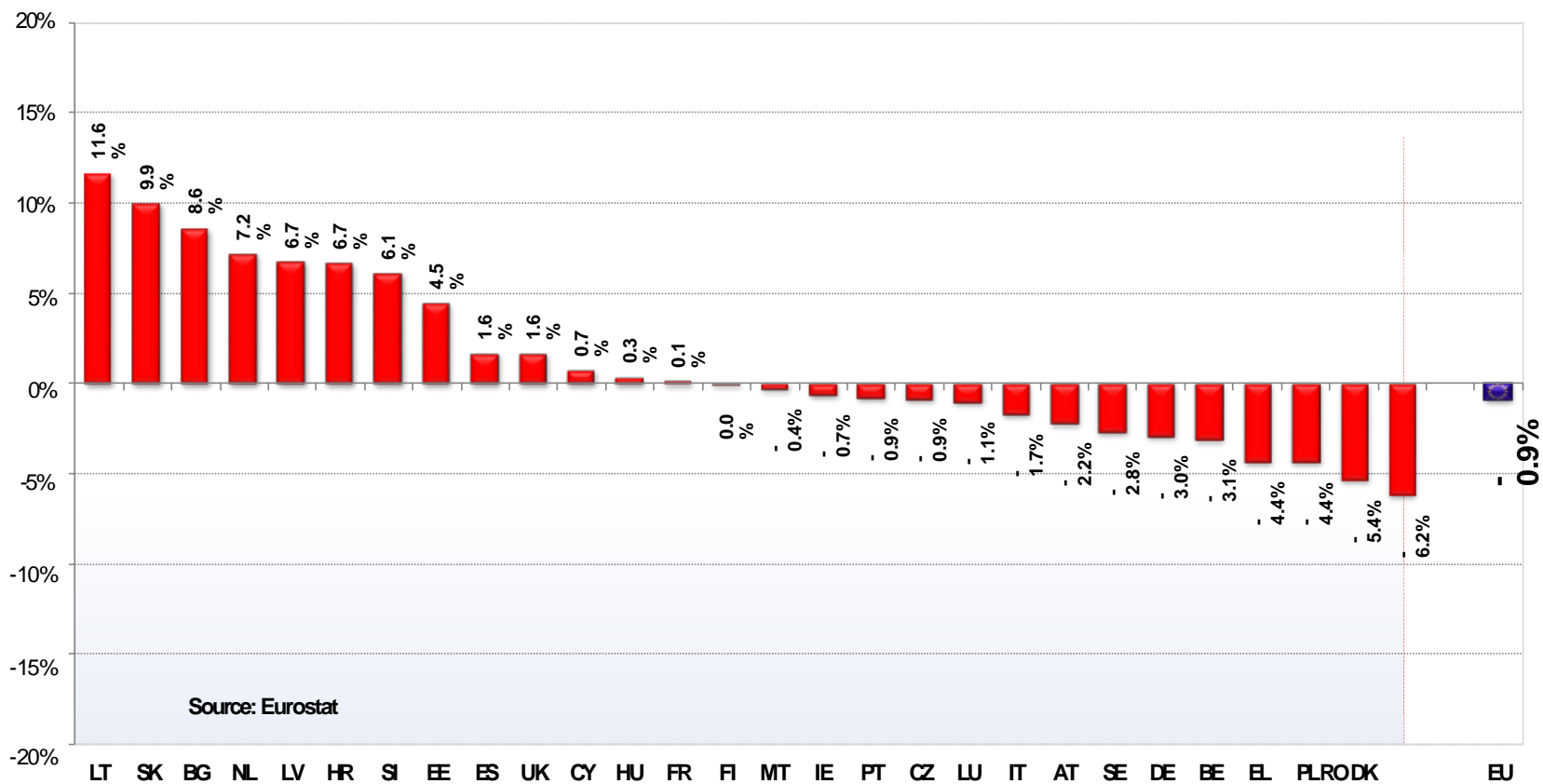
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Change in Pig Slaughter ('000 tonnes) 2019/2018 (up to August)



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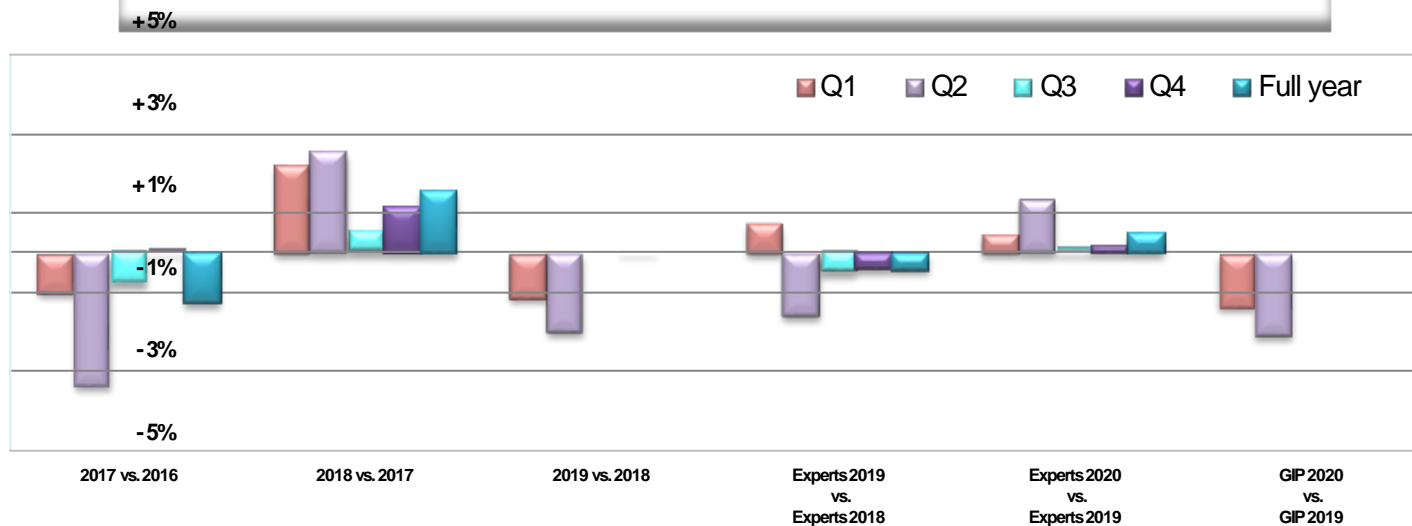
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Change in EU pigmeat slaughter (2019Q3-2020Q4 forecast based on GIP and experts estimations) ('000 head)



	Real Slaughter			Experts 2019 vs. Experts 2018	Experts 2020 vs. Experts 2019	GIP 2020 vs. GIP 2019
	2017 vs. 2016	2018 vs. 2017	2019 vs. 2018			
Q1	-1.0%	+2.2%	-1.1%	+0.8%	+0.5%	-1.4%
Q2	-3.3%	+2.6%	-2.0%	-1.6%	+1.4%	-2.1%
Q3	-0.8%	+0.5%	-0.5%	-0.5%	+0.1%	-
Q4	+0.0%	+1.2%	-0.4%	-0.4%	+0.2%	-
Full year	-1.3%	+1.6%	-0.4%	-0.4%	+0.5%	-



The importance of the EU pig exports

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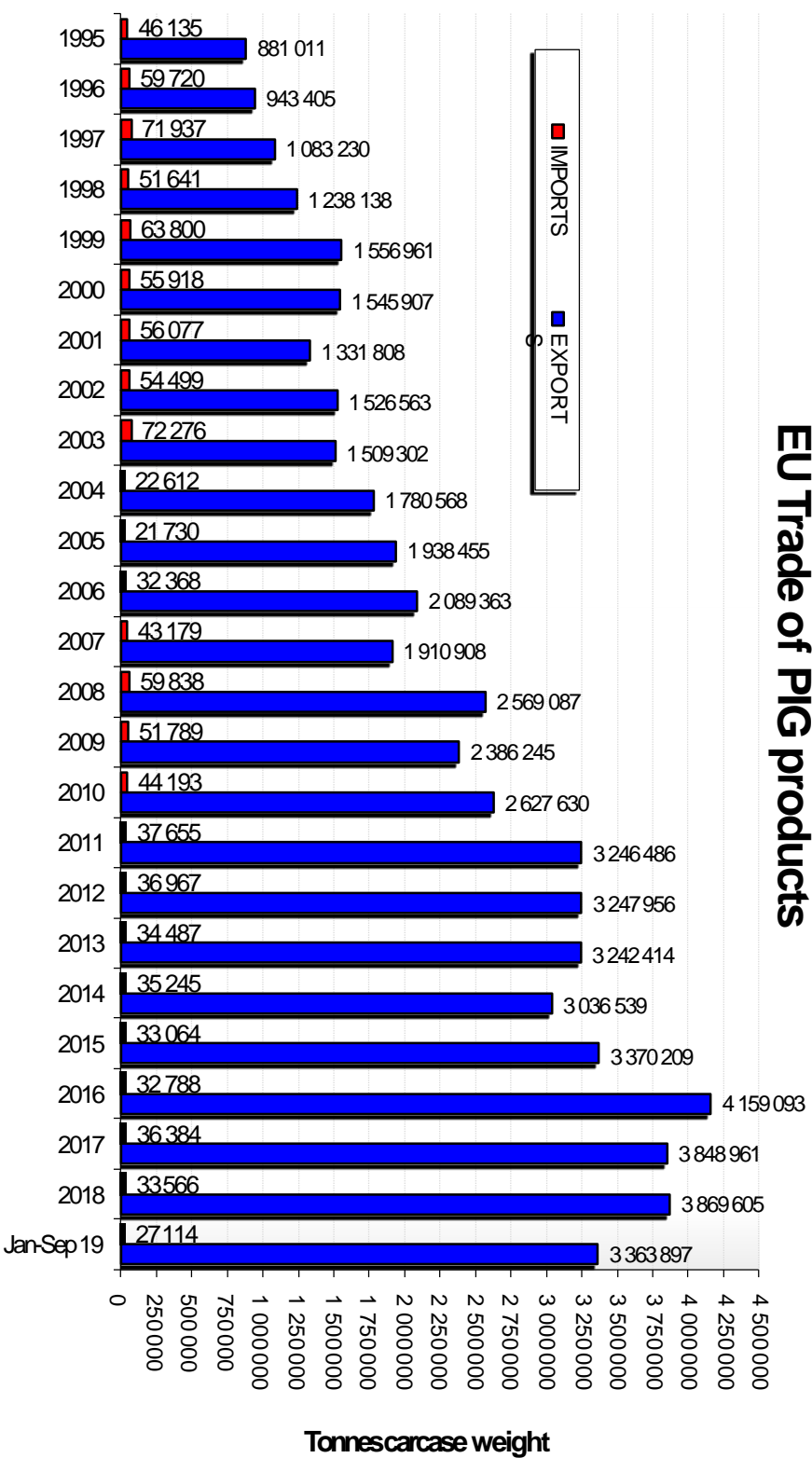


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EU trade of PIG products

EU Trade of PIG products





EU imports of selected PIG products Trade figures (COMEXT – tonnes carcassweight)

IMPORT

	2015		2016		2017		2018		Jan-Sep 19		Compared to Jan-Sep 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Switzerland	20 225	61%	22 257	68%	22 922	63%	19 430	58%	13 184	49%	-13%
Serbia	1 819	6%	614	2%	2 694	7%	3 618	11%	3 605	13%	45%
Norway	2 315	7%	1 989	6%	2 303	6%	2 702	8%	3 440	13%	62%
Chile	2 896	9%	2 958	9%	2 434	7%	2 664	8%	2 501	9%	15%
USA	1 769	5%	1 711	5%	1 707	5%	1 566	5%	1 400	5%	10%
China	378	1%	250	1%	1 315	4%	841	3%	349	1%	-46%
Other	3 663	11%	3 010	9%	3 010	8%	2 745	8%	2 635	10%	
Extra-EU	33 064		32 788		36 384		33 566		27 114		
% change			- 1%		+ 11%		- 8%		+ 4.7%		

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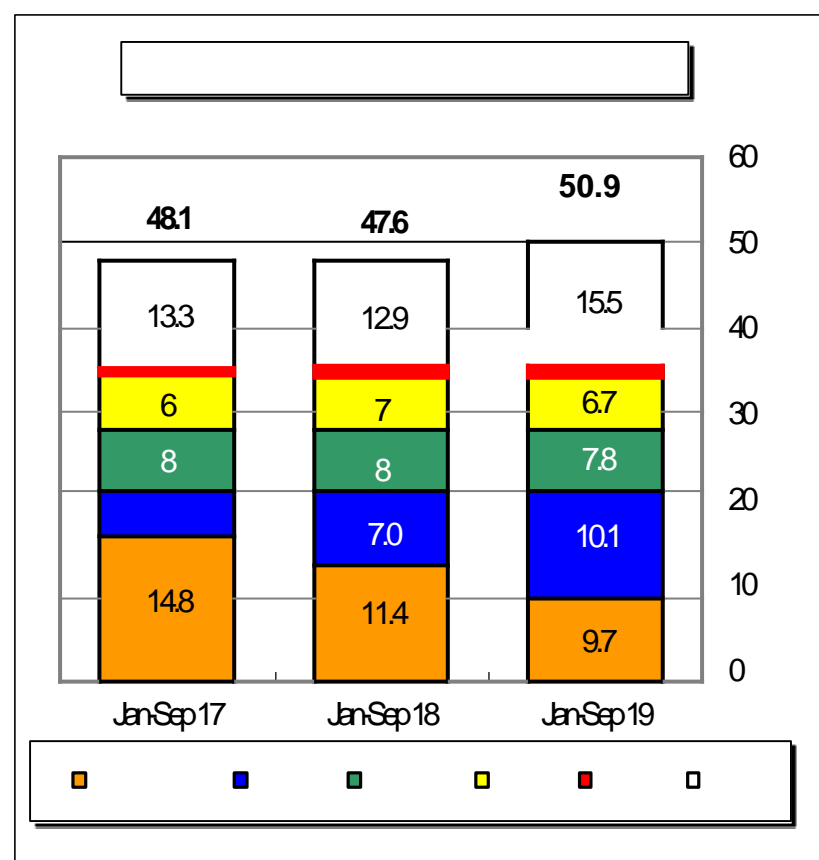
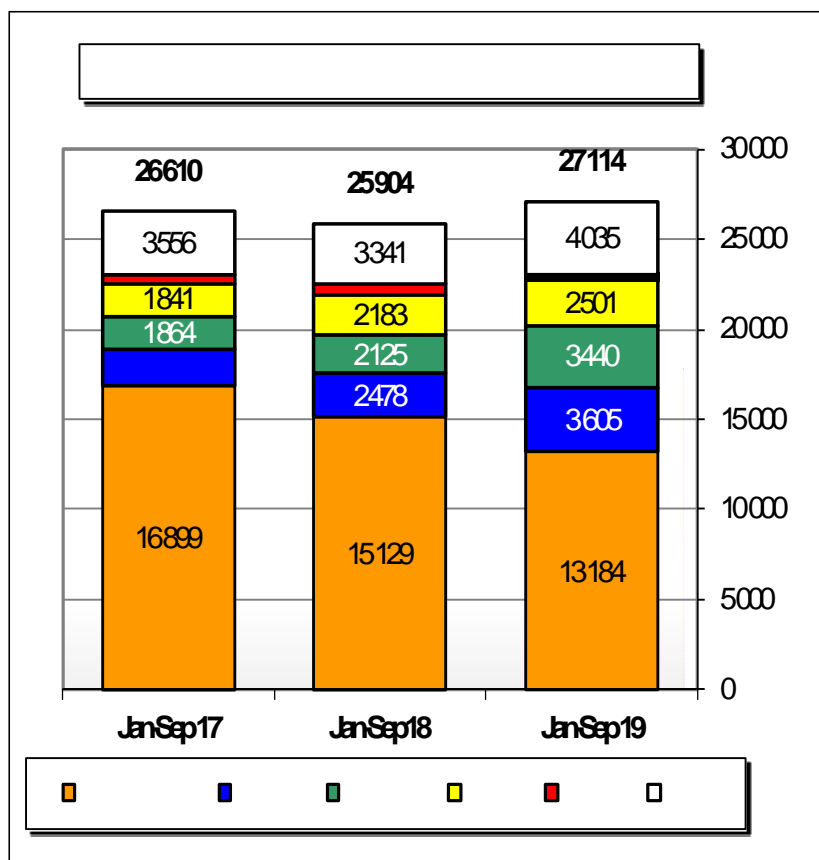
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EU imports of selected PIG products Trade figures (COMEXT- tonnes carcassweight)



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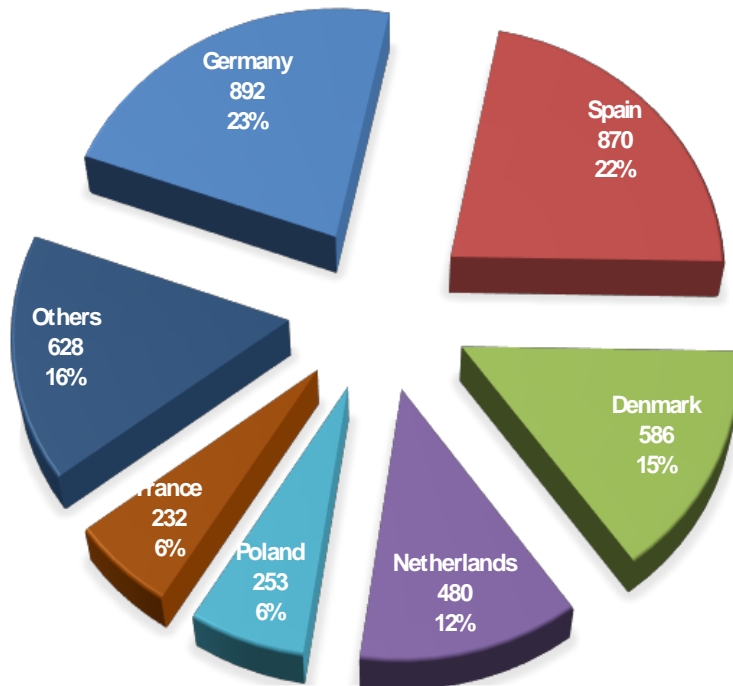
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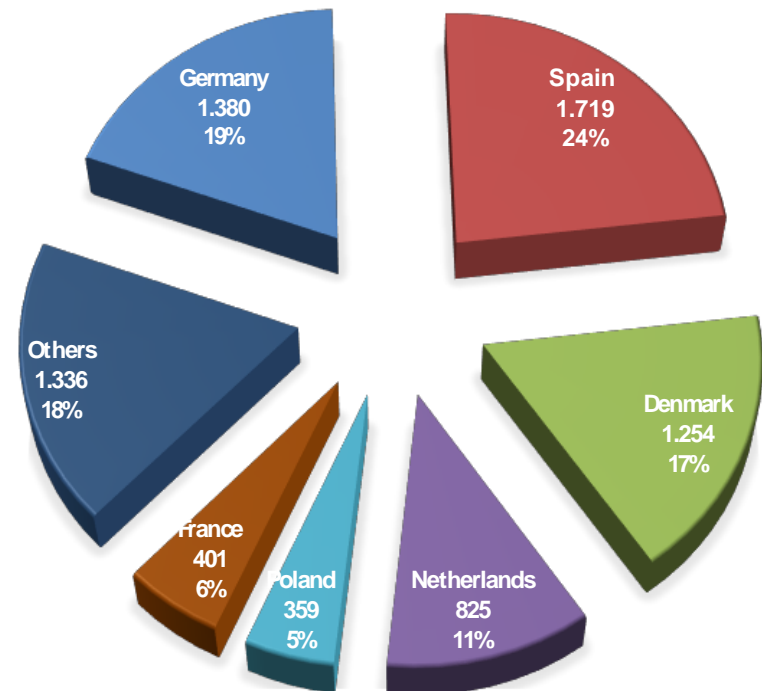
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**EUMAIN EXPORTERS
(1 000 TONNES- 2018 DATA)**



**EUMAIN EXPORTERS
(MILLIONS EUROS- 2018 DATA)**



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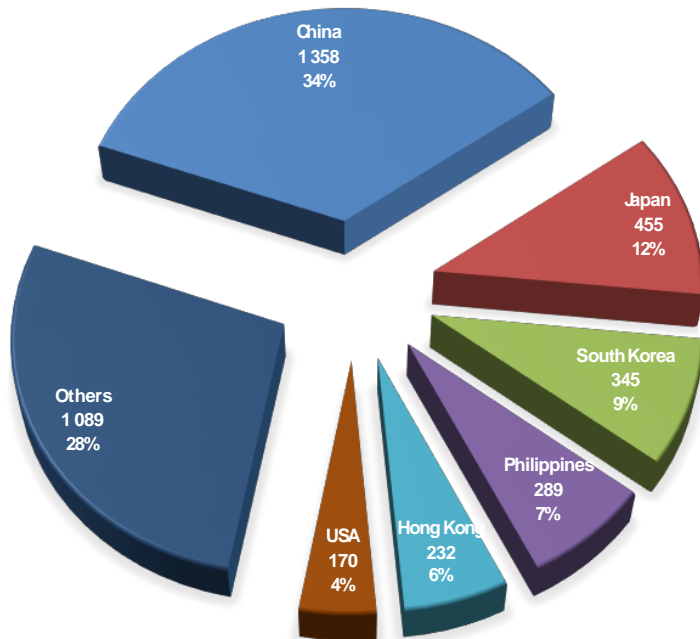
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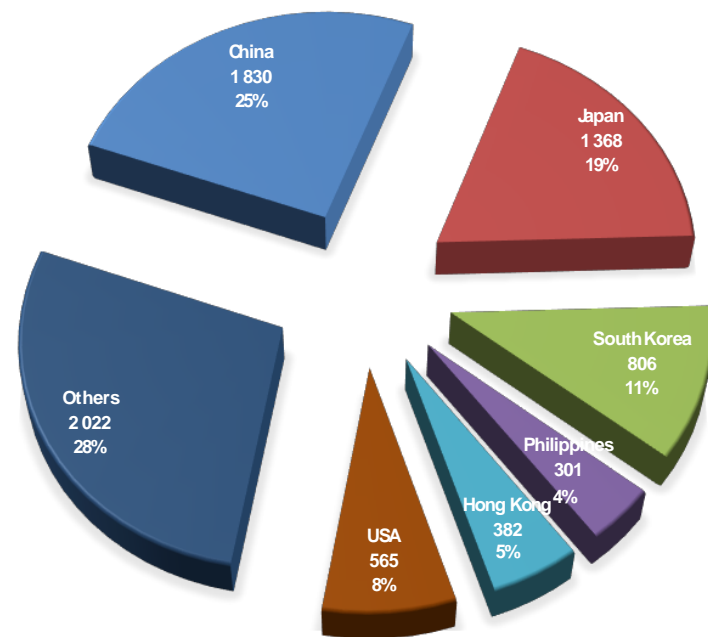
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**EU PIGMEAT EXPORT DESTINATIONS
(1 000 TONNES- 2018 DATA)**



**EU PIGMEAT EXPORT DESTINATIONS
(MILLIONS EUROS- 2018 DATA)**



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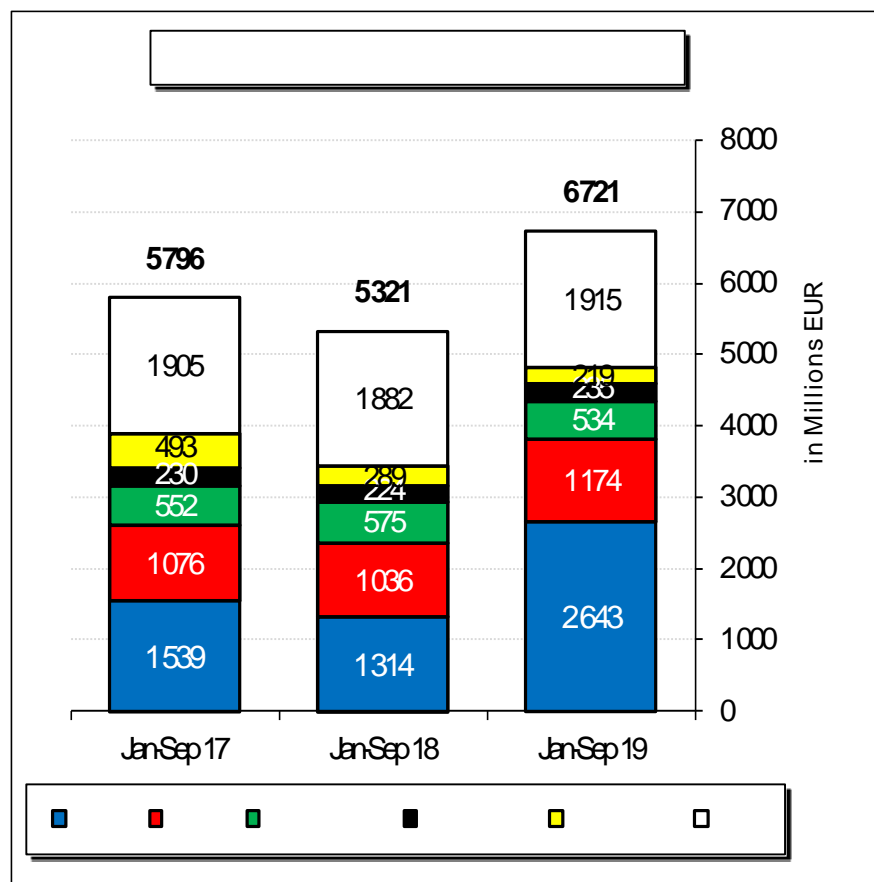
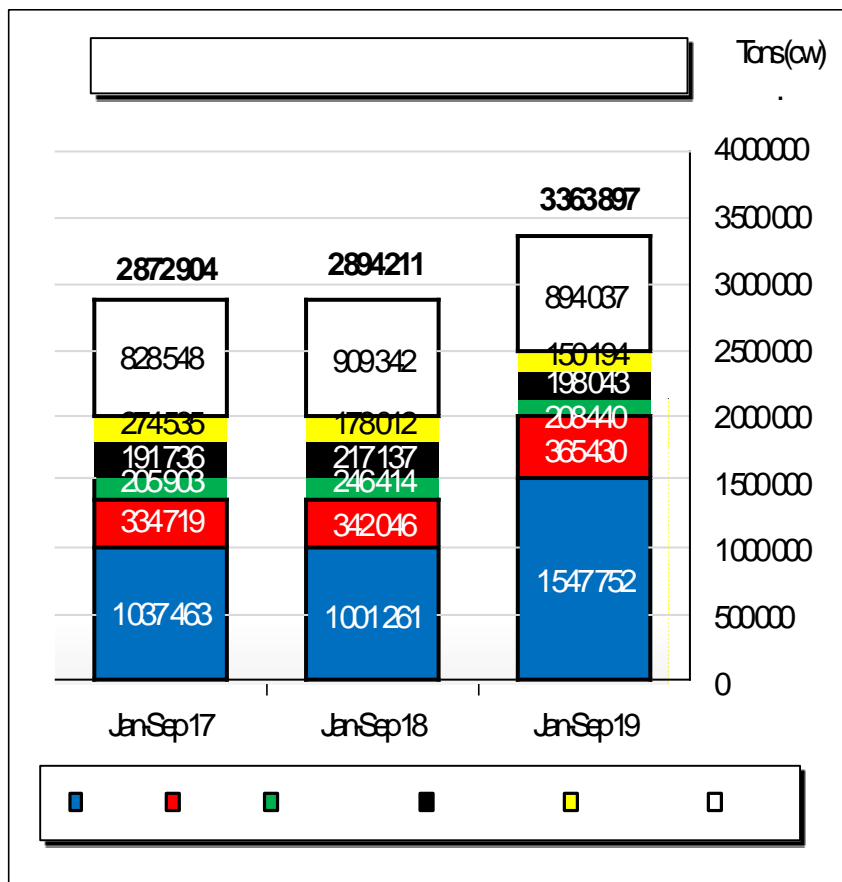


EU exports of selected PIG products: Trade figures (COMEXT– tonnes carcassweight)

	2015		2016		2017		2018		Jan-Sep 19		Compared to Jan-Sep 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
China	1 141 484	33.9%	1 866 110	44.9%	1 406 733	36.5%	1 353 489	35.0%	1 547 752	46.0%	+ 55%
Japan	364 745	10.8%	405 311	9.7%	425 761	11.1%	433 429	11.2%	365 430	10.9%	+ 7%
South Korea	241 569	7.2%	260 593	6.3%	276 136	7.2%	335 126	8.7%	208 440	6.2%	- 15%
Philippines	191 891	5.7%	216 514	5.2%	251 492	6.5%	284 044	7.3%	198 043	5.9%	- 9%
Hong Kong	292 651	8.7%	363 251	8.7%	383 948	10.0%	231 825	6.0%	150 194	4.5%	- 16%
USA	105 123	3.1%	116 806	2.8%	155 461	4.0%	165 460	4.3%	105 954	3.1%	- 19%
Australia	102 645	3.0%	101 174	2.4%	95 351	2.5%	96 870	2.5%	86 710	2.6%	+ 24%
Vietnam	38 290	1.1%	53 483	1.3%	41 637	1.1%	86 357	2.2%	75 317	2.2%	+ 28%
Ukraine	96 619	2.9%	75 547	1.8%	86 944	2.3%	107 065	2.8%	69 798	2.1%	- 12%
Taiwan	53 701	1.6%	47 825	1.1%	64 443	1.7%	55 537	1.4%	44 542	1.3%	+ 3%
Serbia	47 488	1.4%	41 151	1.0%	54 924	1.4%	65 583	1.7%	37 348	1.1%	- 28%
Ivory Coast	50 240	1.5%	36 825	0.9%	41 475	1.1%	52 288	1.4%	36 116	1.1%	+ 6%
Other	643 762	19.1%	574 504	13.8%	564 656	14.7%	602 533	15.6%	438 252	13.0%	
Extra-EU	3 370 209		4 159 093		3 848 961		3 869 605		3 363 897		
% change			+ 23%		- 7%		+ 1%		+ 16.2%		



EU exports of selected PIG products Trade figures (COMEXT- tonnes carcass weight)



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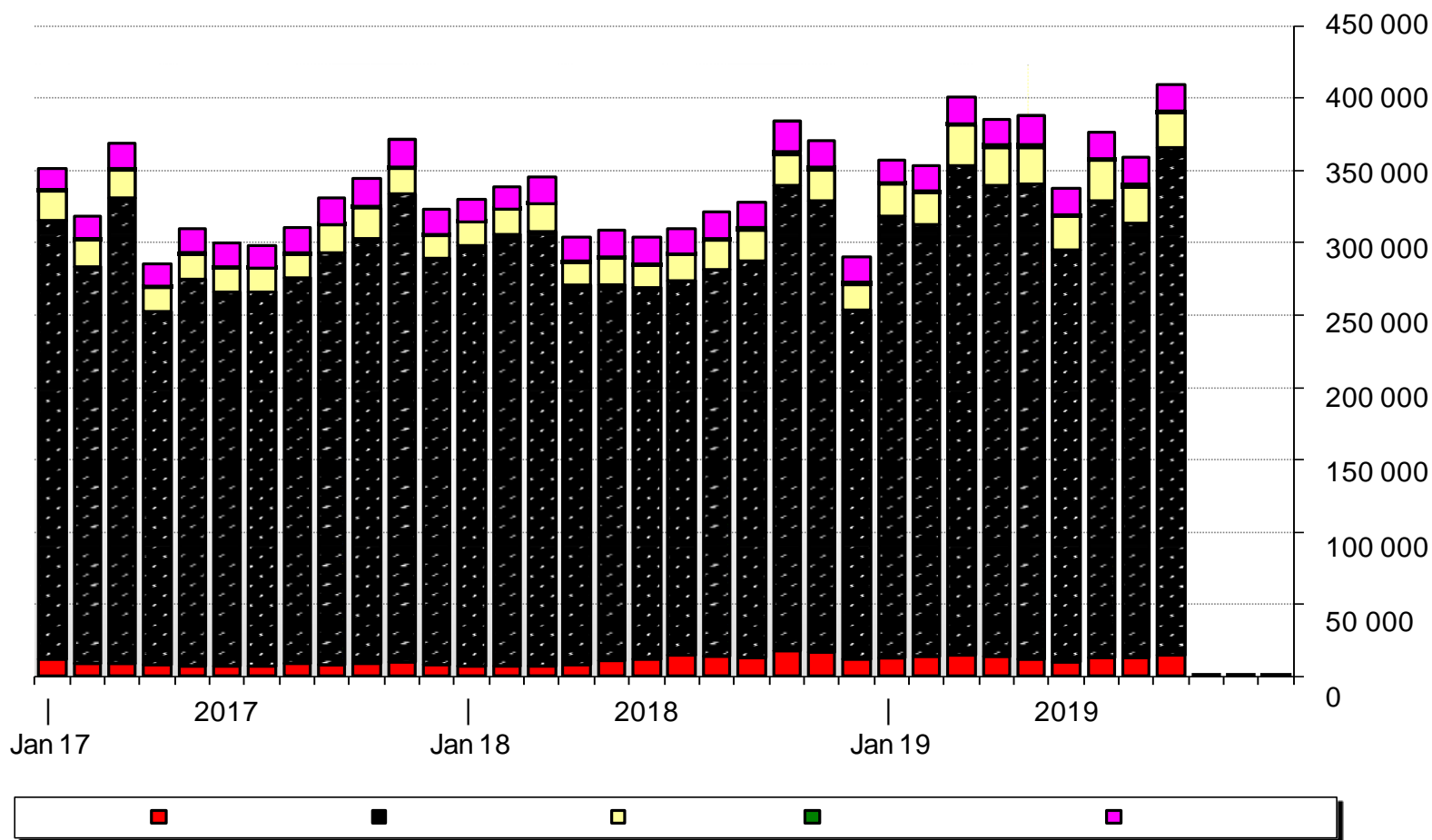


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EU Exports of selected PIG

in Tonnes
(carcase weight)



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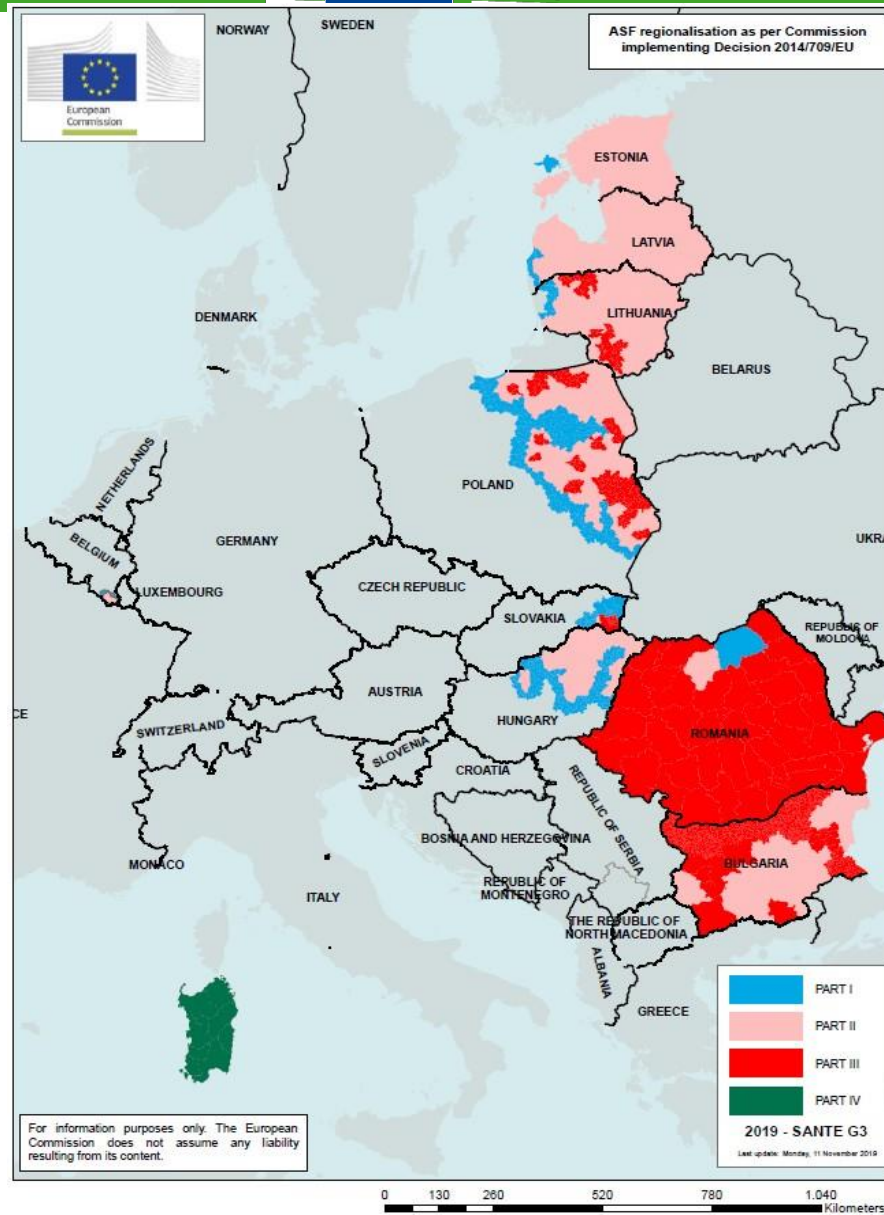
The current challenges for the EU pig exports

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ASF REGIONALISATION



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