



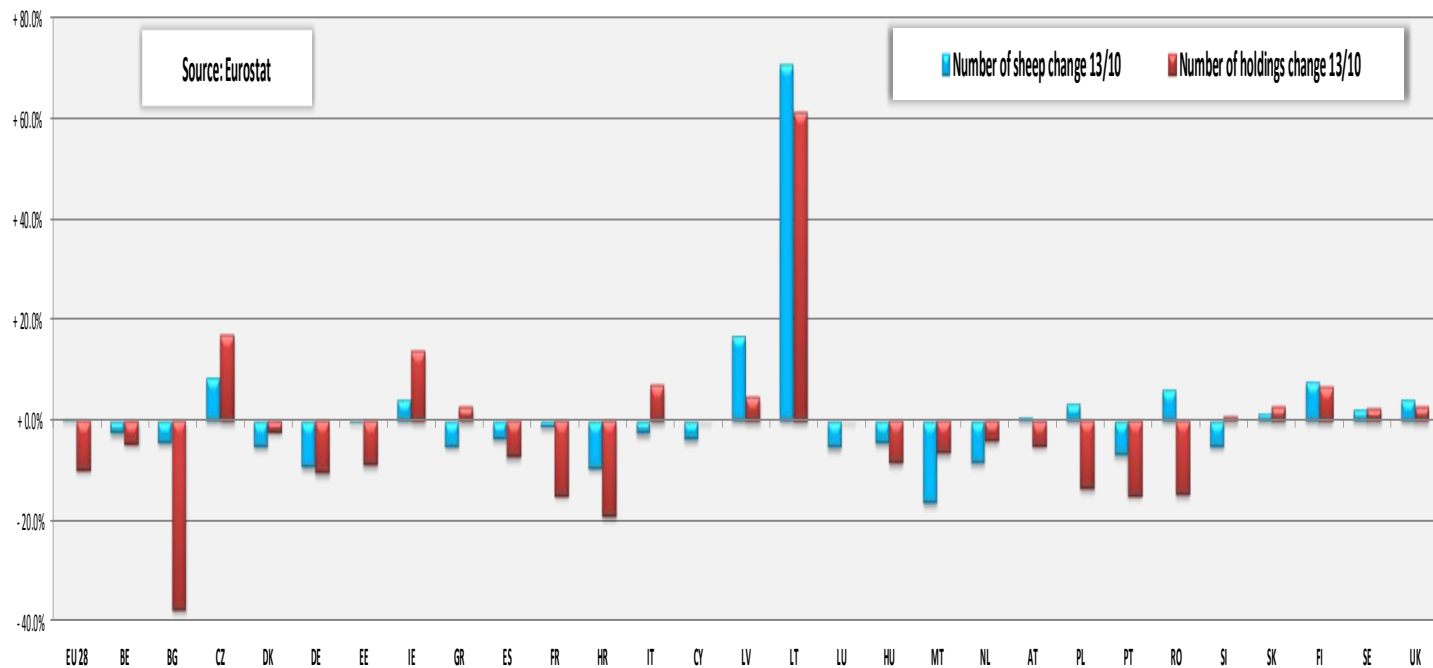
SHEEP FORECAST WORKING GROUP
Market Situation for Sheep & Goats
25 April 2016



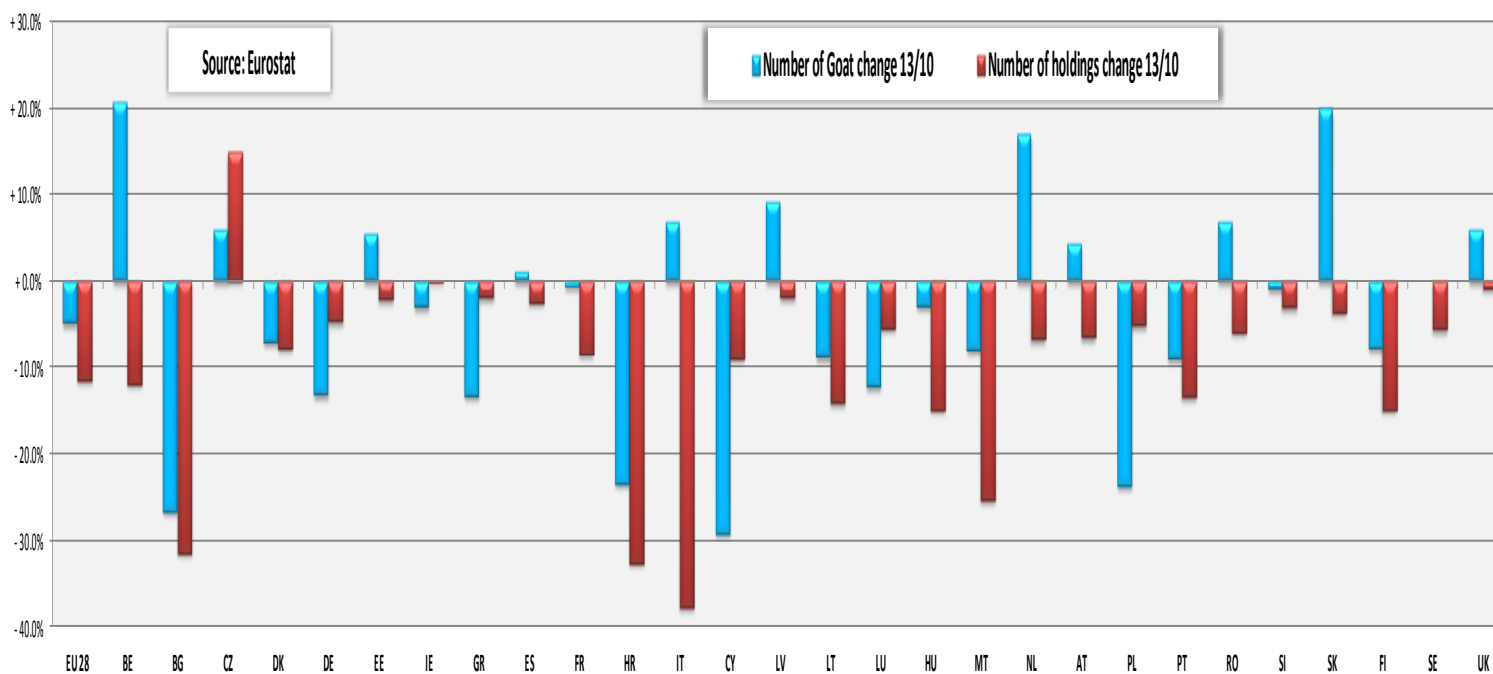
Production

Farm Structure Survey

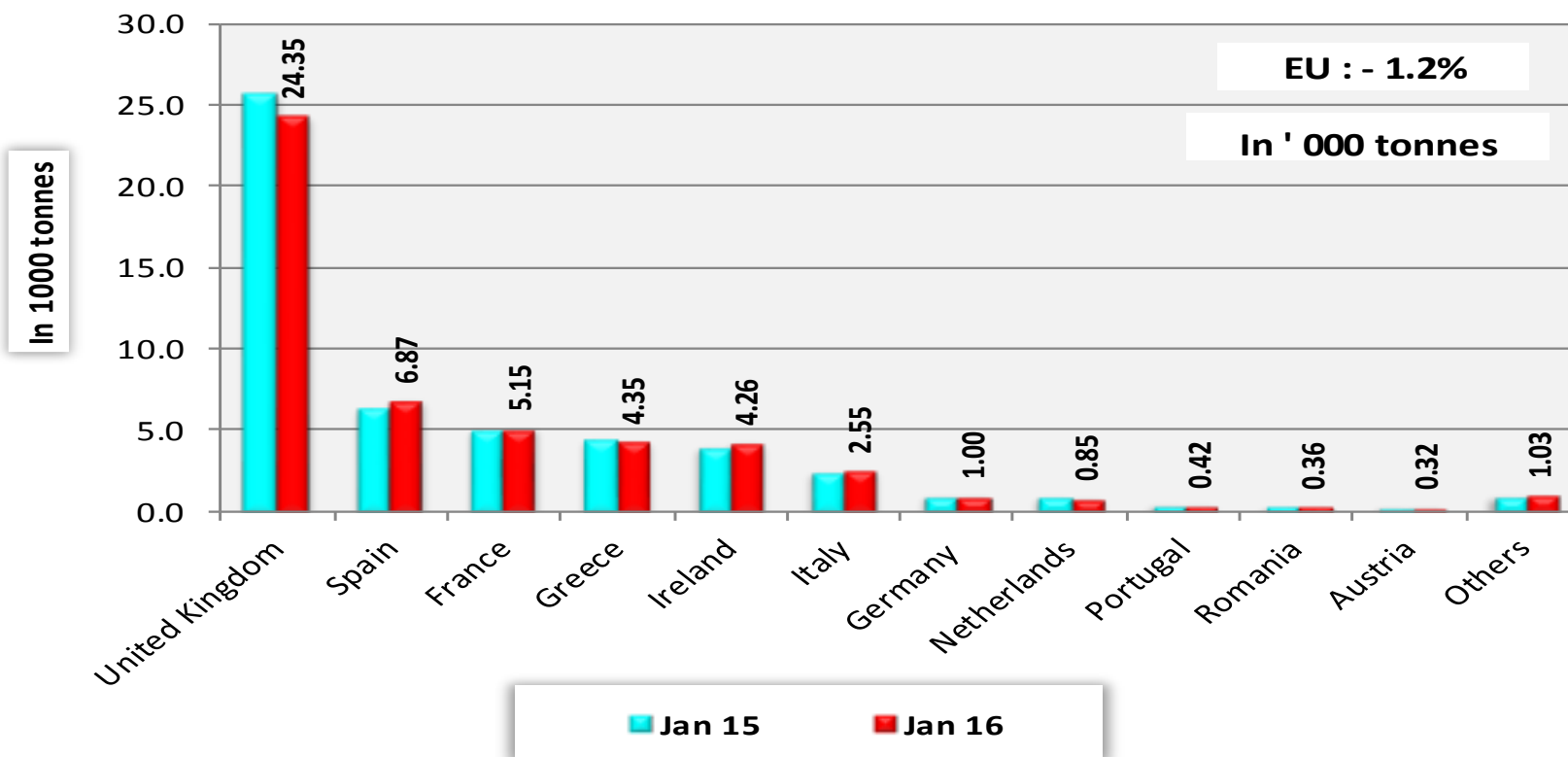
Change in number of sheep and holdings



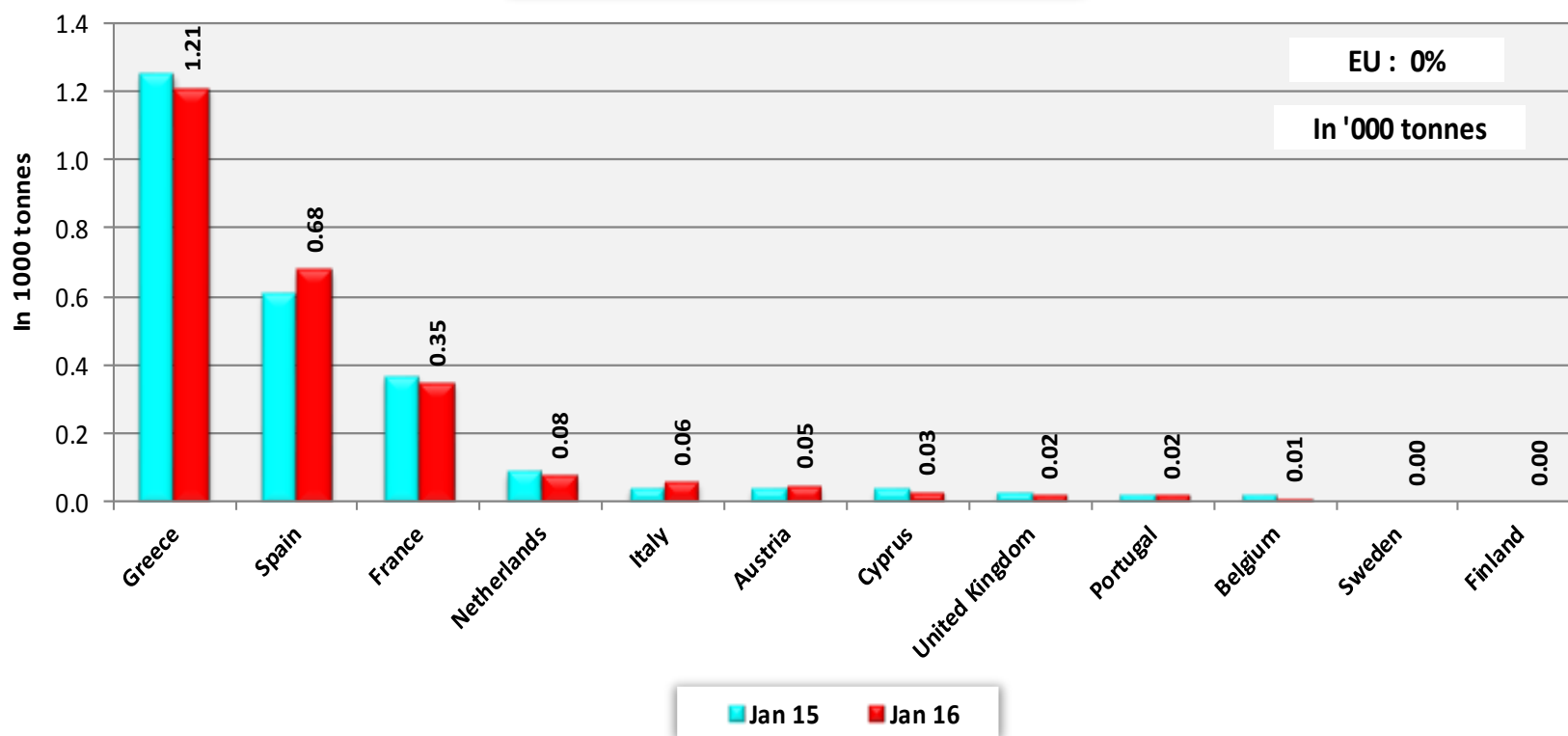
Farm Structure Survey Change in number of goats and holdings



Change in Sheep Slaughter 2015/2016 (up to January)



Change in Goat Slaughter 2015/2016 (up to January)

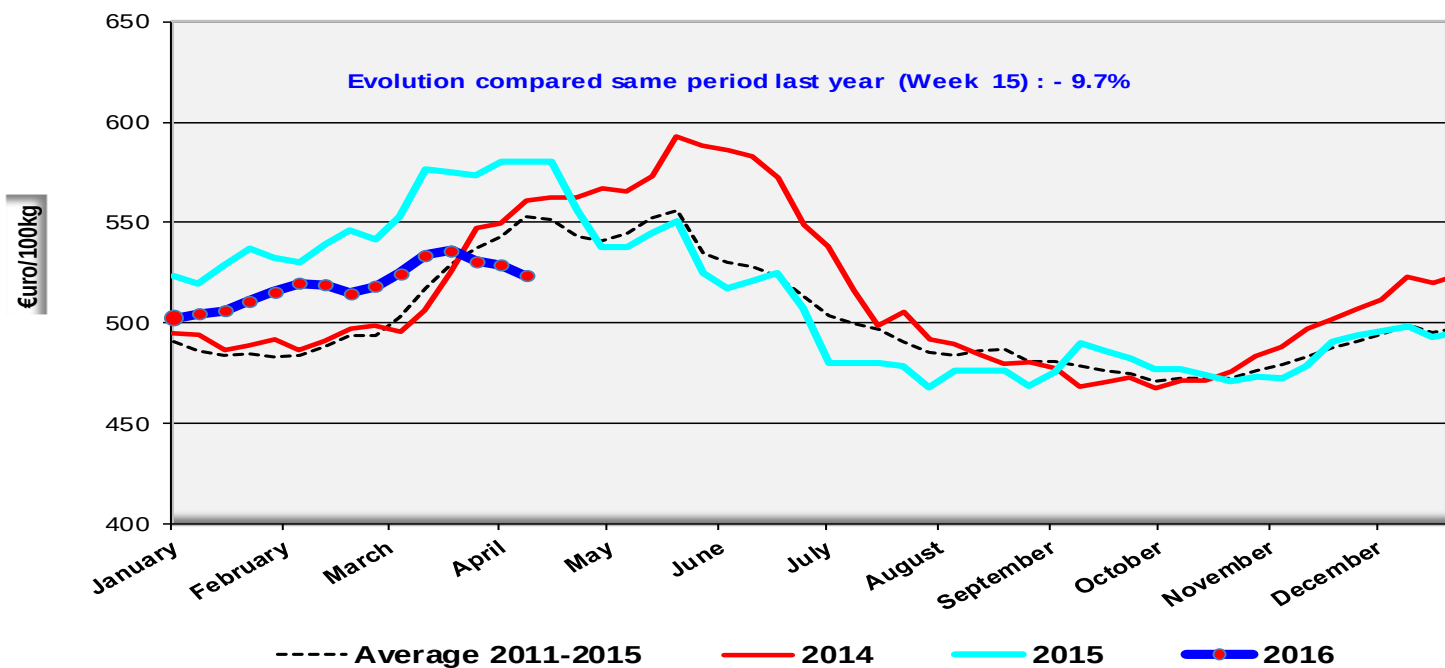




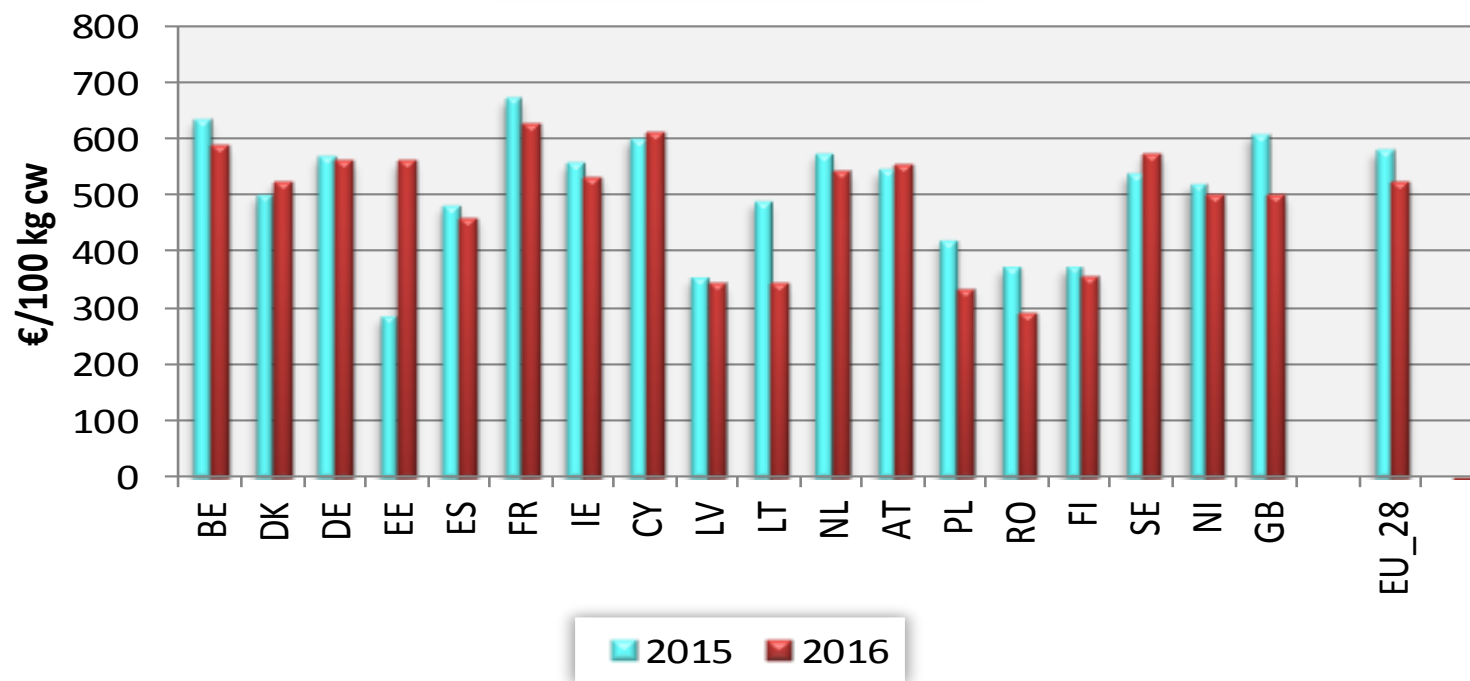
Prices

Heavy Lamb prices in the EU

Latest price (Week 15) : 523.64 EUR/100 kg

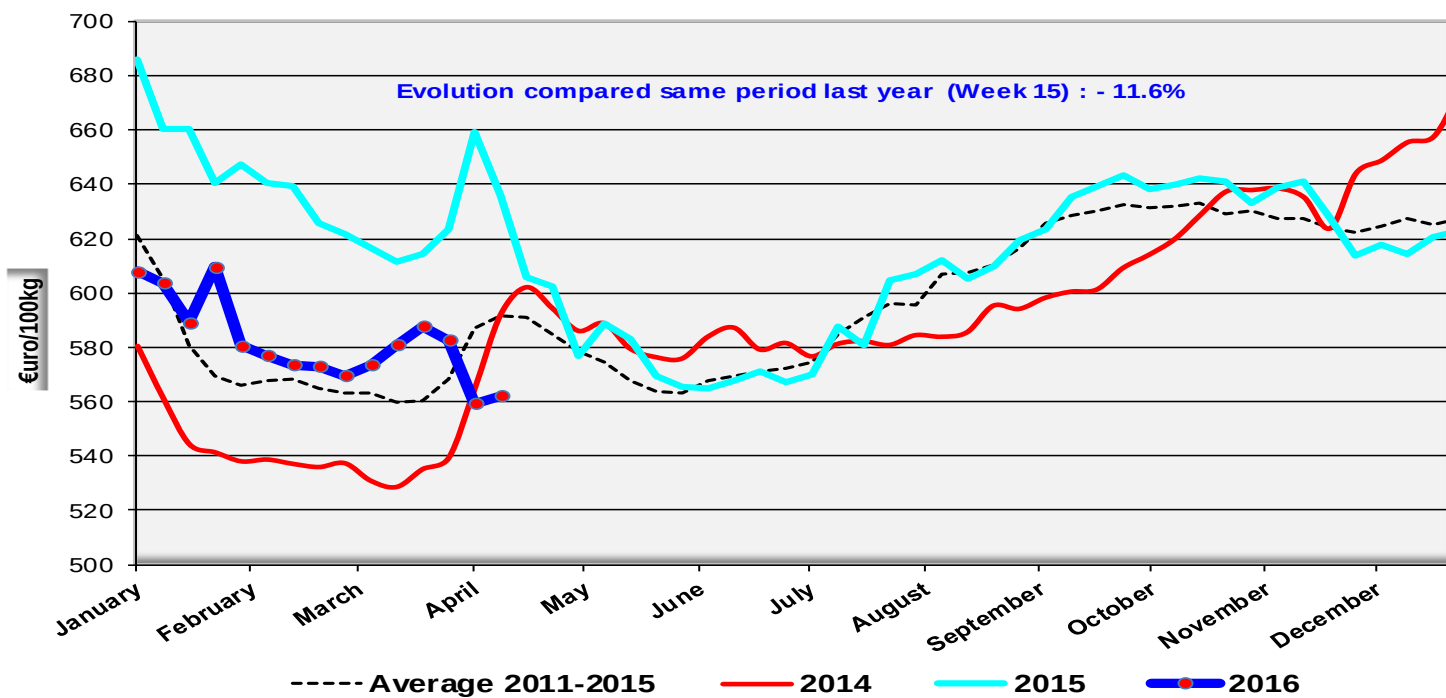


Heavy lamb prices (week 15)

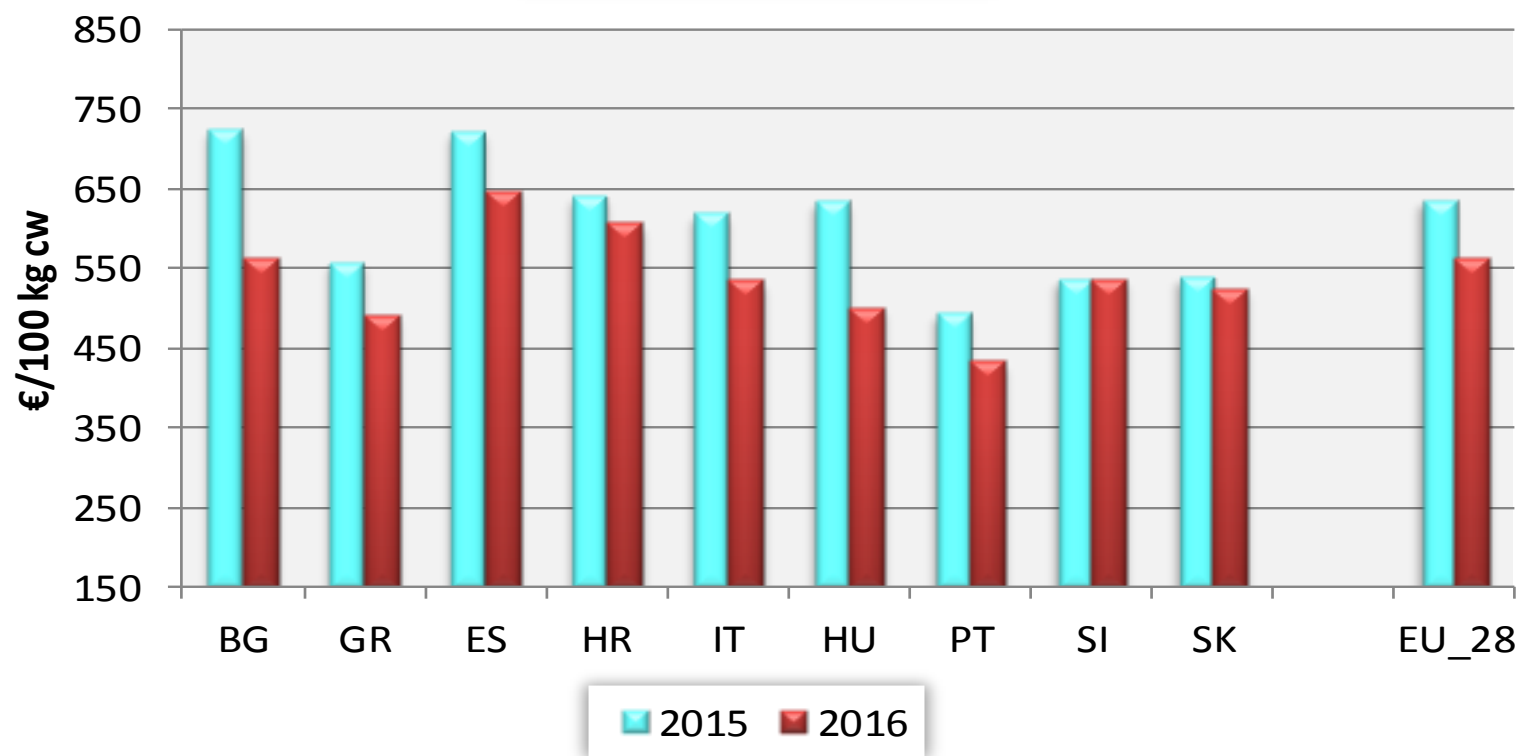


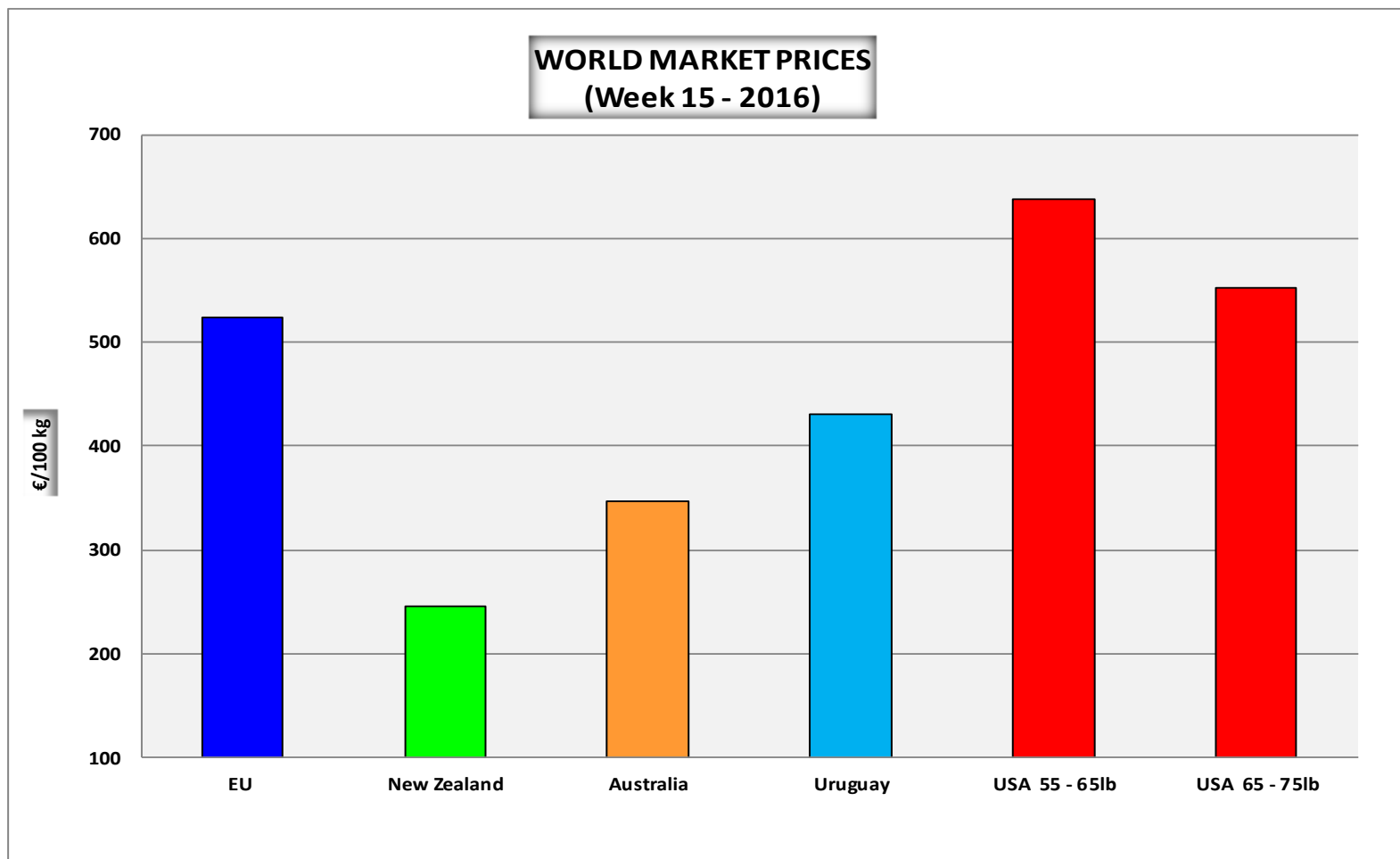
Light Lamb prices in the EU

Latest price (Week 15) : 562.14 EUR/100 kg

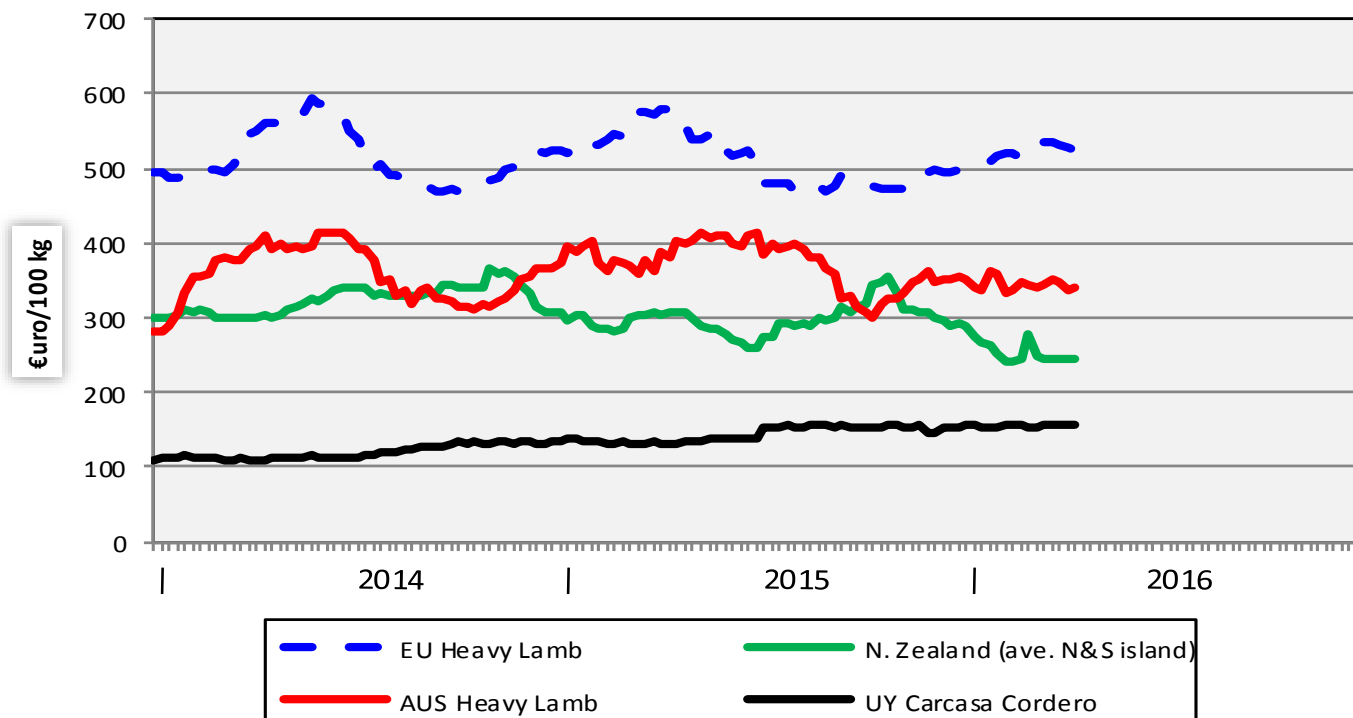


Light lamb prices (week 15)





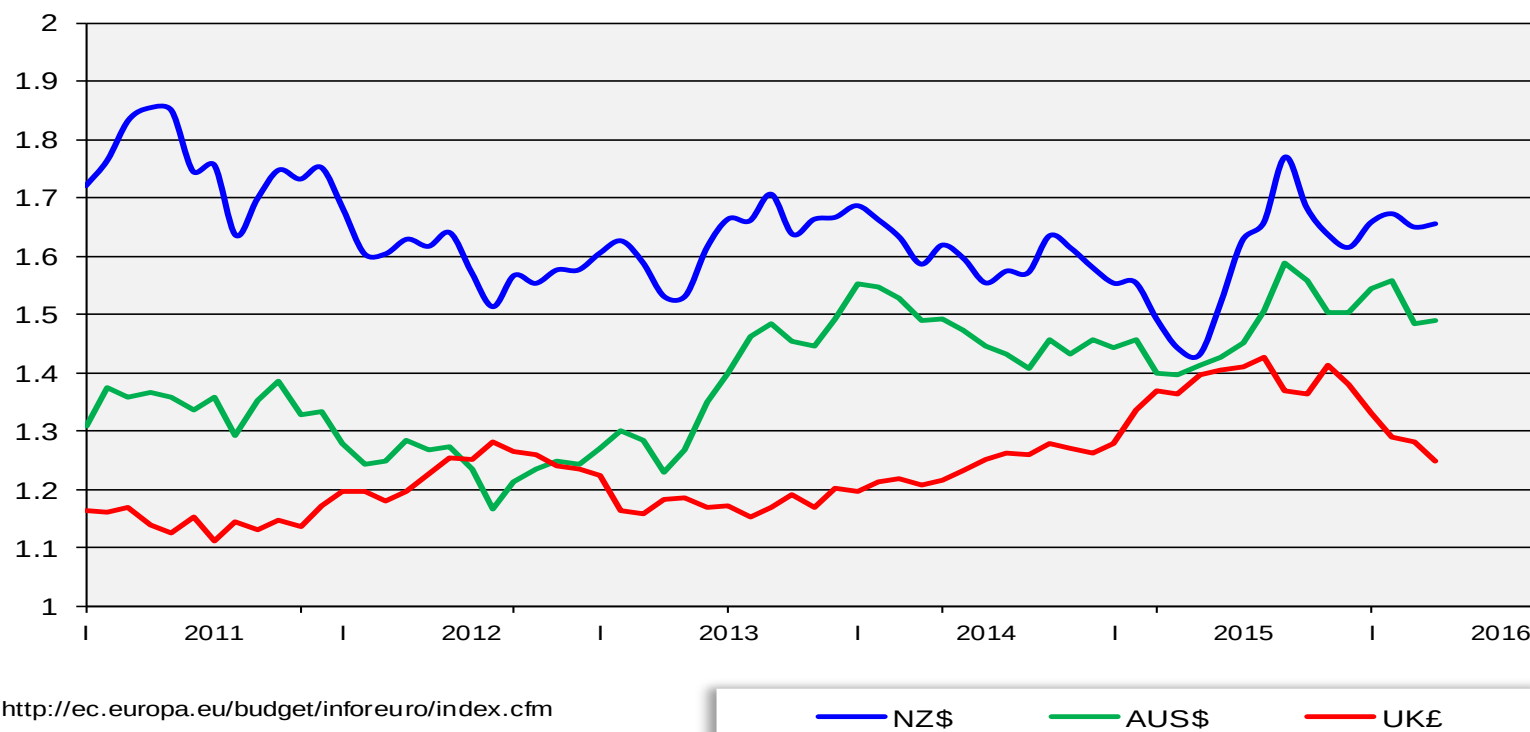
EU average and international market prices for **Heavy** lamb carcasses





Trade

EURO EXCHANGE RATE





EU import of sheep & goat meat and live animals

Trade figures (Comext)

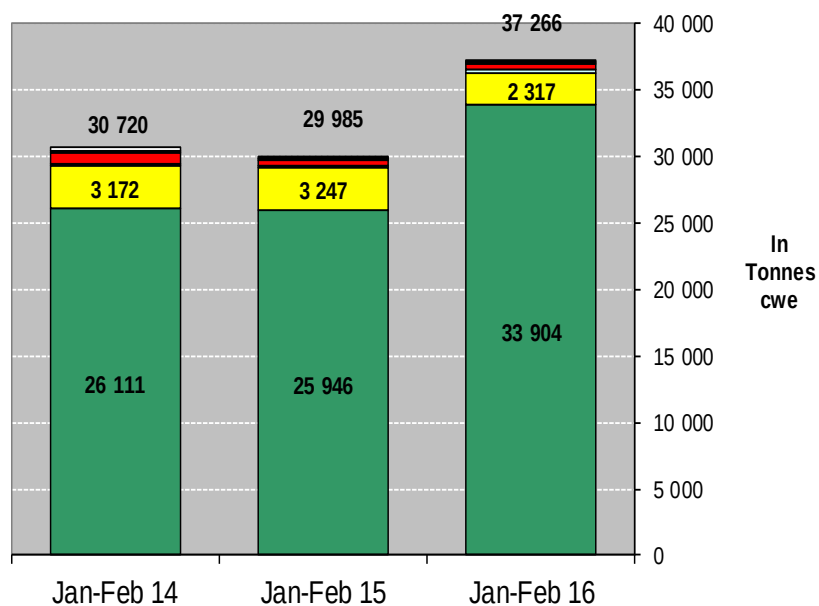
IMPORT

	2012		2013		2014		2015		Jan-Feb 16		Compared to Jan-Feb 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
New Zealand	170 112	84.7%	178 732	84.4%	165 934	82.5%	182 177	85.8%	33 904	91.0%	+ 30.7%
Australia	17 631	8.8%	19 645	9.3%	21 407	10.6%	20 672	9.7%	2 317	6.2%	- 28.6%
Iceland	1 102	0.5%	1 441	0.7%	1 798	0.9%	1 766	0.8%	396	1.1%	+++
Uruguay	3 504	1.7%	3 264	1.5%	3 278	1.6%	1 740	0.8%	385	1.0%	- 4.4%
For.JRep.Mac	2 527	1.3%	2 666	1.3%	2 484	1.2%	1 945	0.9%	160	0.4%	- 5.0%
Argentina	1 944	1.0%	1 115	0.5%	1 604	0.8%	671	0.3%	44	0.1%	+++
Chile	3 226	1.6%	3 983	1.9%	3 628	1.8%	2 525	1.2%	37	0.1%	- 57.7%
Falkland Is.	616	0.3%	740	0.3%	789	0.4%	670	0.3%	16	0.0%	+++
Other Origins	895	0.4%	903	0.4%	880	0.4%	773	0.4%	21	0.1%	- 17.8%
EXTRA EU	200 941		211 751		201 014		212 270		37 266		
% change			+ 5%		- 5%		+ 6%		+ 24.3%		

EU imports of sheep & goatmeat and live animals

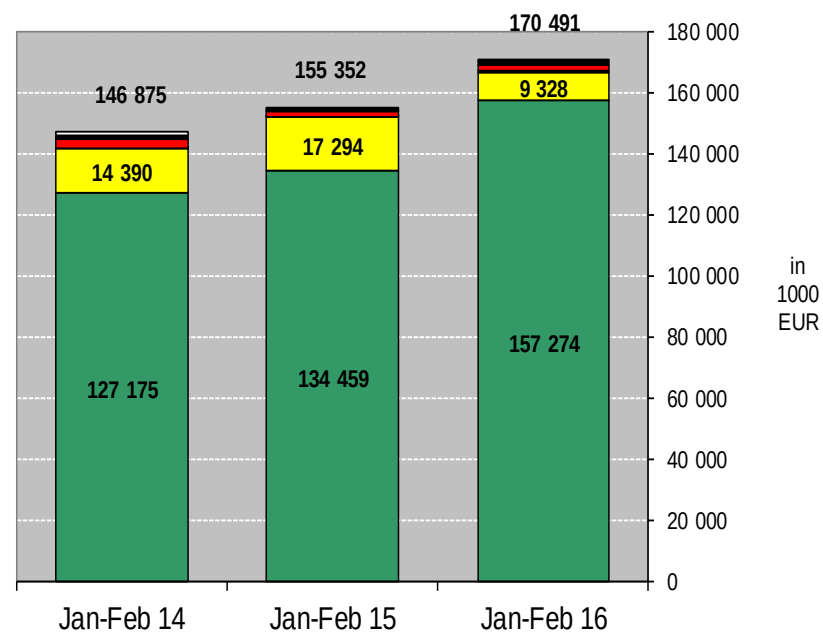
Trade figures (COMEXT)

EU IMPORTS of Sheet & Goat (Tonnes cwe)



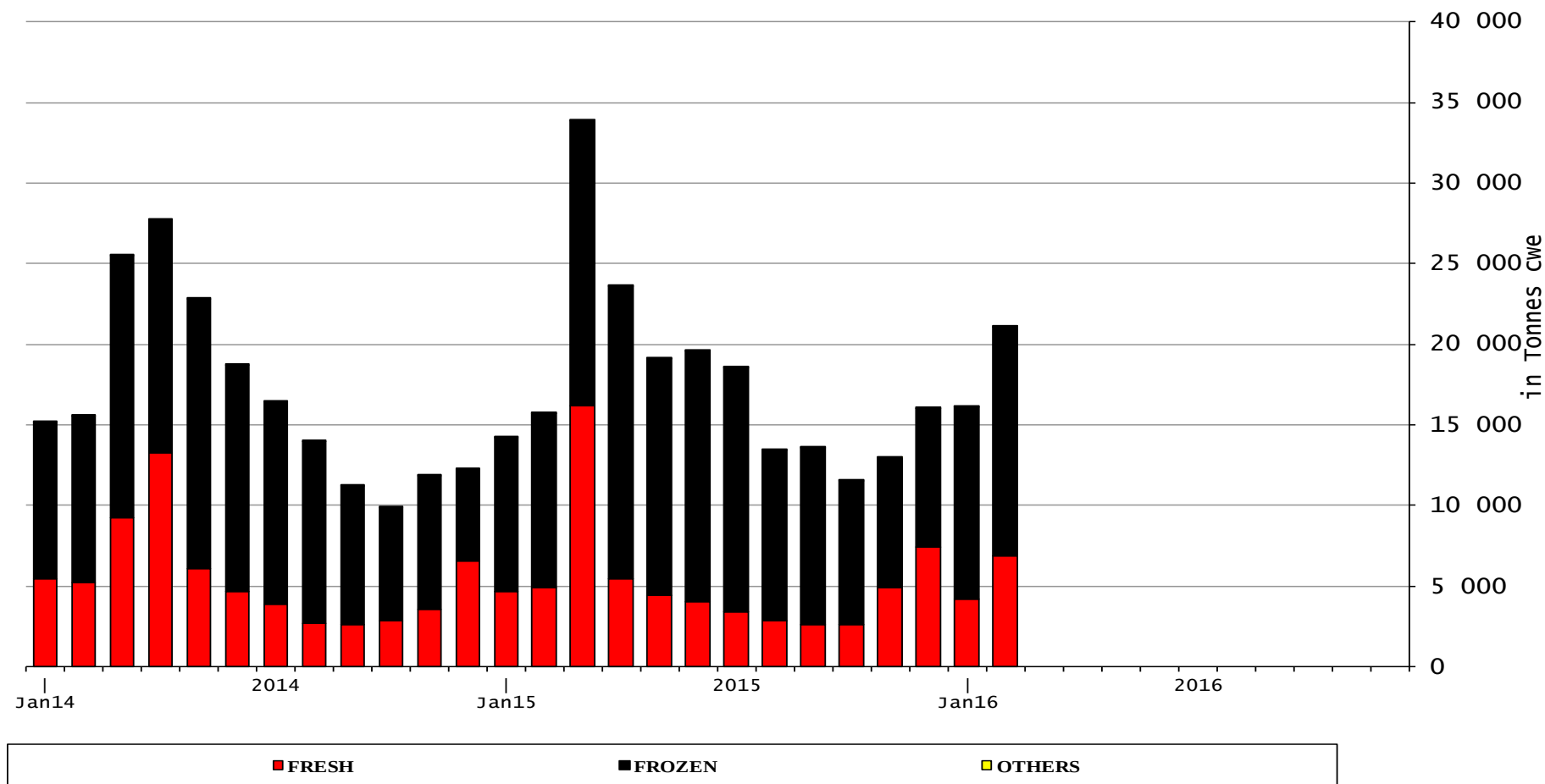
■ New Zealand ■ Australia ■ Iceland ■ Uruguay ■ For.JRep.Mac □ Other origins

EU IMPORTS of Sheet & Goat (1000 EUR)



■ New Zealand ■ Australia ■ Iceland ■ Uruguay ■ For.JRep.Mac □ Other origins

EU-28 Imports of Sheep and Goat products



UTILISATION OF SHEEPMET AND GOATMEAT TARIFF QUOTAS IN 2015

EU-28 : **January > December 2015**

Reg. 1354/2011

COUNTRY GROUP No	CN CODES	ORIGIN	ORDER NUMBER	Period: 01/01/2015 - 31/12/2015 Unit: tonnes cwe				
				Annual quota	Balance (remaining amount)	Actual import	Quota use %	Period: 01/01/2014 - 31/12/2014
1	0204	Argentina	09.2011	23 000	22 466	534	2%	1 425
		Australia	09.2012	19 186	2 693	16 493	86%	19 110
		New Zealand	09.2013	228 254	53 714	174 540	76%	155 162
		Uruguay	09.2014	5 800	4 015	1 785	31%	3 274
		Chile	09.1922	7 400	4 897	2 503	34%	3 560
		Norway	09.0781	300	300	0	0%	0
		Greenland	09.0693	100	100	0	0%	0
		Faeroes	09.0690	20	19	1	5%	1
		Turkey	09.0227	200	200	0	0%	0
		Others	09.2015	200	200	0	0%	20
		Erga Omnes	09.2016	200	5	195	98%	200
2	0204 0210 99 21 0210 99 29 0210 99 60	Iceland	09.0790	1 850	757	1 093	59%	822
3	0104 10 30 0104 10 80 0104 20 90	Erga Omnes	09.2019	92	92	0	0%	0
TOTAL				286 602	89 458	197 144	69%	183 574

UTILISATION OF SHEEPMEAT AND GOATMEAT TARIFF QUOTAS IN 2016

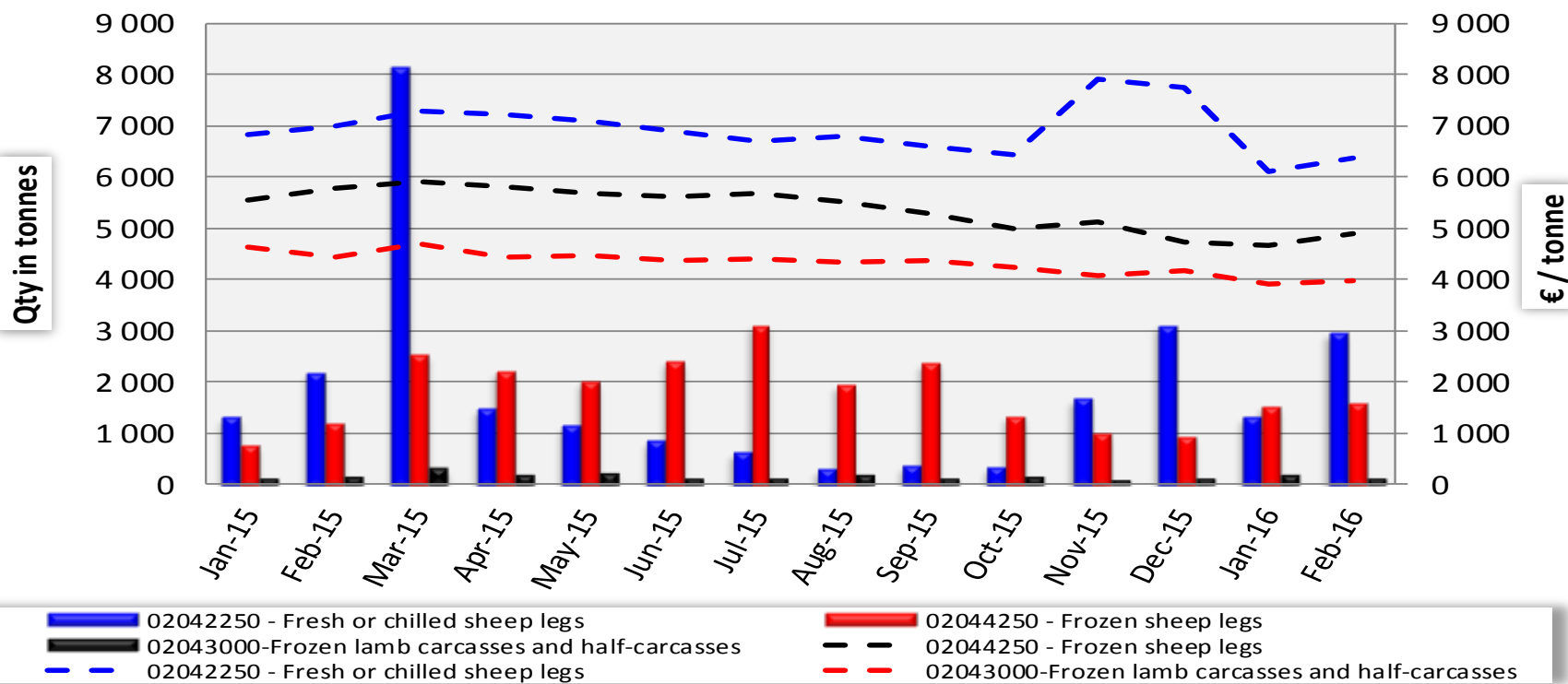
EU-28 : **January > December 2016**

Reg. 1354/2011

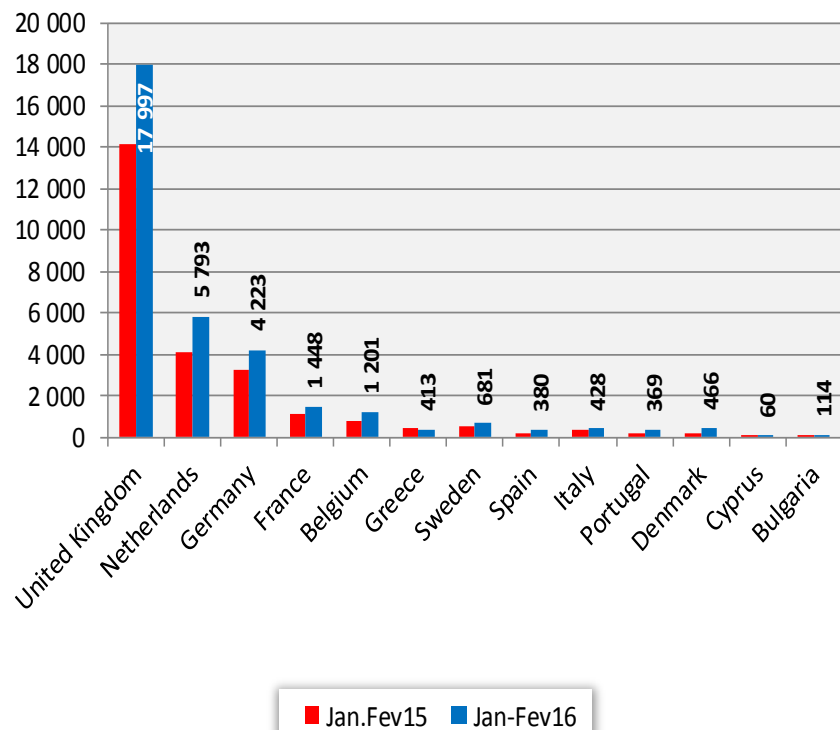
COUNTRY GROUP No	CN CODES	ORIGIN	ORDER NUMBER	Period: 01/01/2016 - 31/12/2016 Unit: tonnes cwe				
				Annual quota	Balance (remaining amount)	Actual import	Quota use %	Period: 01/01/2015 - 31/12/2015
1	0204	Argentina	09.2011	23 000	22 858	142	1%	534
		Australia	09.2012	19 186	14 649	4 537	24%	16 493
		New Zealand	09.2013	228 254	159 878	68 376	30%	174 540
		Uruguay	09.2014	5 800	5 090	710	12%	1 785
		Chile	09.1922	7 400	7 253	147	2%	2 503
		Norway	09.0781	300	300	0	0%	0
		Greenland	09.0693	100	100	0	0%	0
		Faeroes	09.0690	20	20	0	0%	1
		Turkey	09.0227	200	200	0	0%	0
		Others	09.2015	200	200	0	0%	0
		Erga Omnes	09.2016	200	85	115	58%	195
2	0204 0210 99 21 0210 99 29 0210 99 60	Iceland	09.0790	1 850	1 294	556	30%	1 093
3	0104 10 30 0104 10 80 0104 20 90	Erga Omnes	09.2019	92	92	0	0%	0
TOTAL				286 602	212 019	74 583	26%	197 144

SHEEP & GOAT PRODUCTS IMPORTED FROM NEW ZEALAND

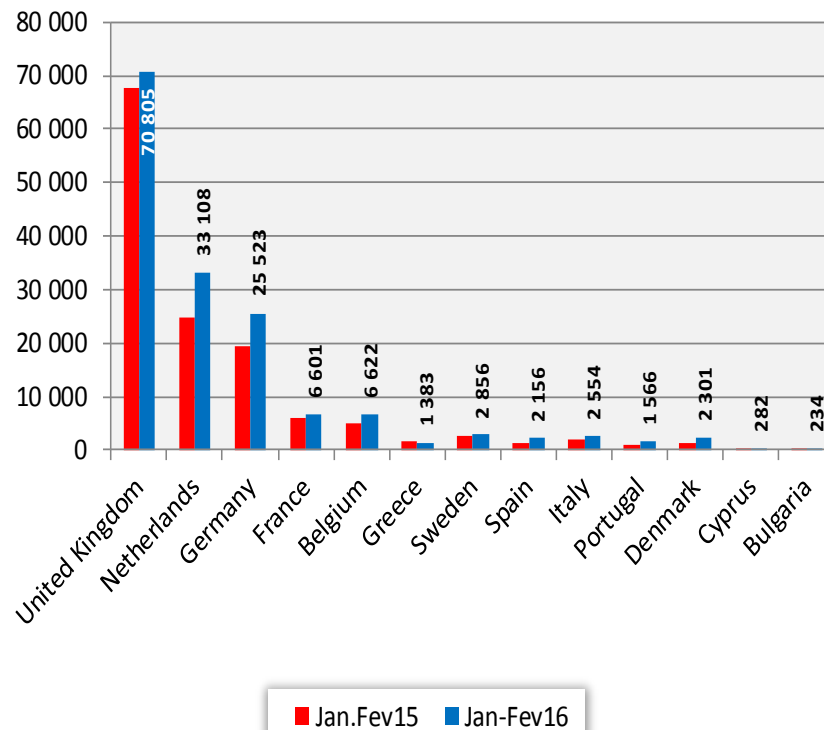
**Fresh or chilled sheep legs - Frozen sheep legs
- Frozen lamb carcasses and half-carcasses**



**NZ Exports to MS
(In tonnes cw)**



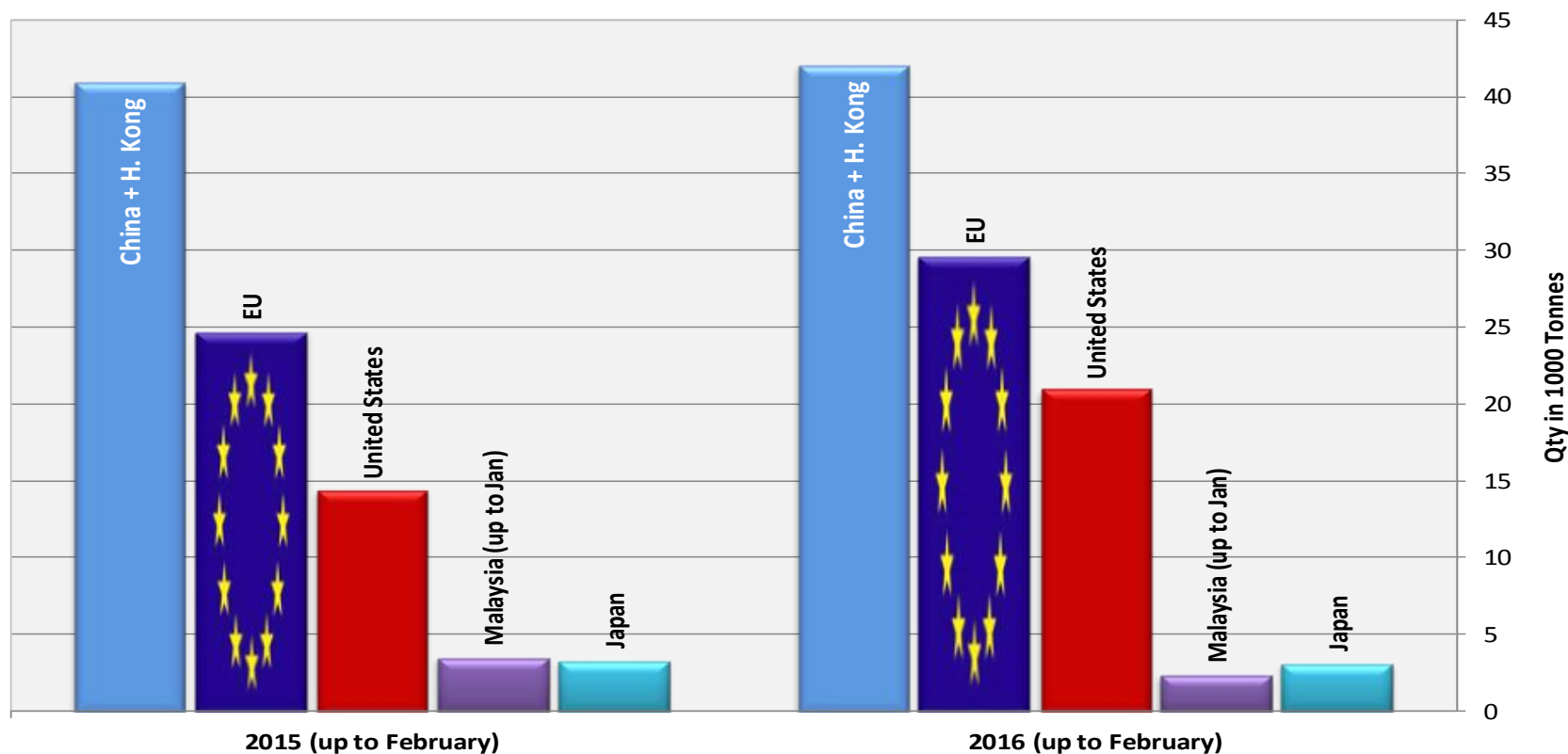
**NZ Exports to MS
(In 1000 €)**



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

Source : GTA & Eurostat

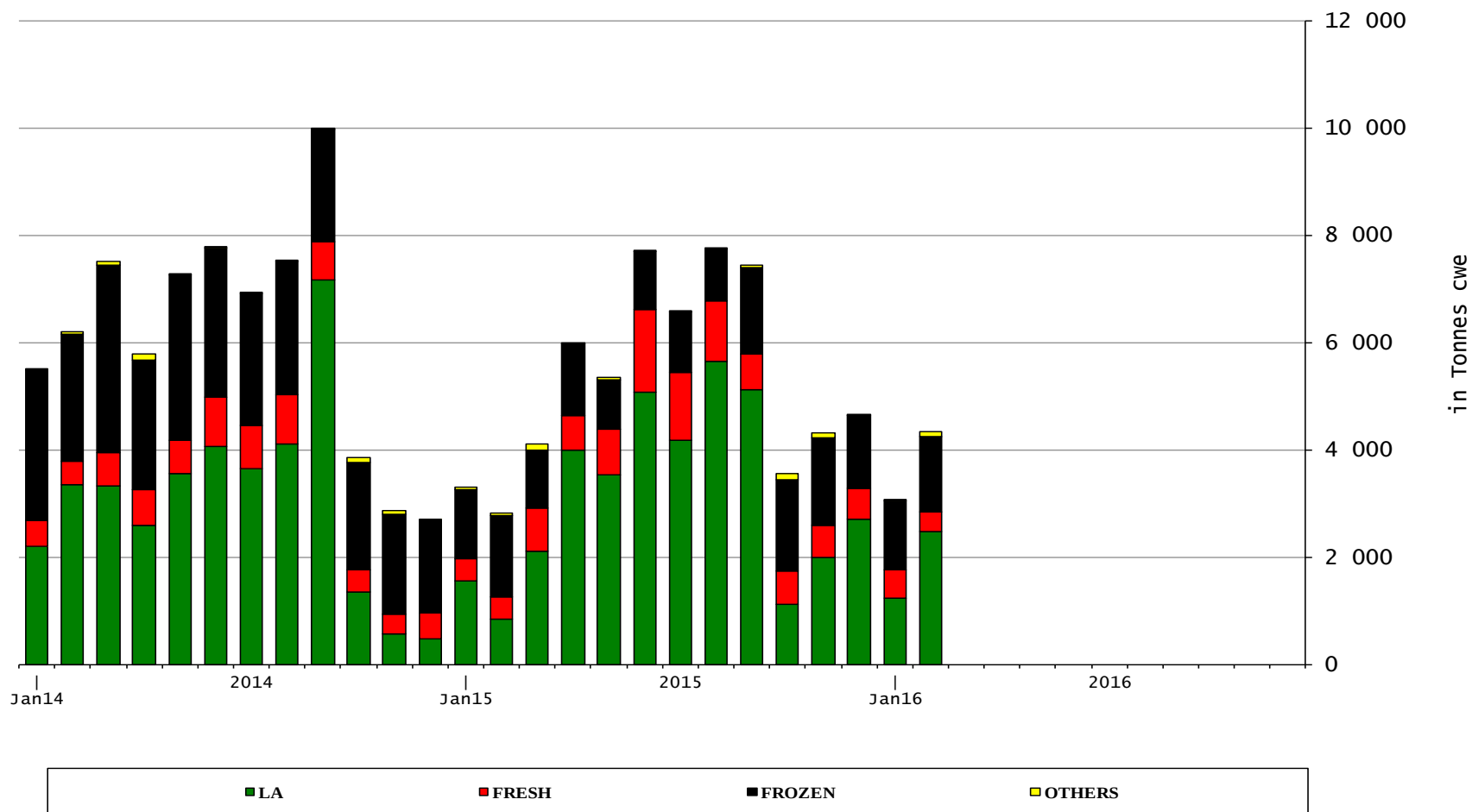
(excl. live animals)



EU exports of sheep & goat meat and live animals: Trade figures (COMEXT – tonnes cwe)

	2012		2013		2014		2015		Jan-Feb 16		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Feb 15
Libya	13 562	24.4%	23 466	31.4%	25 122	34.0%	21 407	33.8%	2 306	31.0%	+ 60.8%
Hong Kong	14 014	25.2%	23 122	31.0%	19 375	26.2%	5 687	9.0%	974	13.1%	- 45.6%
Lebanon	2 375	4.3%	2 416	3.2%	3 024	4.1%	3 834	6.0%	796	10.7%	- 14.9%
Jordan	5 860	10.5%	7 036	9.4%	7 834	10.6%	14 405	22.7%	690	9.3%	+++
Ghana	2 271	4.1%	3 138	4.2%	1 810	2.5%	3 273	5.2%	604	8.1%	+ 63.8%
Switzerland	2 846	5.1%	3 238	4.3%	2 584	3.5%	2 940	4.6%	489	6.6%	+ 5.1%
Algeria	275	0.5%	1 355	1.8%	1 951	2.6%	2 531	4.0%	224	3.0%	+ 86.7%
Ivory Coast	565	1.0%	1 118	1.5%	1 350	1.8%	1 164	1.8%	211	2.8%	+++
Vietnam	1 743	3.1%	25	0.0%	123	0.2%	352	0.6%	186	2.5%	+++
Israel	14	0.0%	11	0.0%	12	0.0%	71	0.1%	165	2.2%	+++
U.A.Emirates	339	0.6%	316	0.4%	1 079	1.5%	571	0.9%	106	1.4%	+ 59.3%
Congo	169	0.3%	125	0.2%	365	0.5%	308	0.5%	65	0.9%	+ 4.9%
Somalia	0	0.0%	0	0.0%	0	0.0%	51	0.1%	64	0.9%	+++
Russia	152	0.3%	14	0.0%	7	0.0%	3	0.0%	0	0.0%	- 100.0%
Other Destinations	11 445	20.6%	9 251	12.4%	9 190	12.4%	6 818	10.8%	558	7.5%	+ 60.8%
EXTRA EU	55 630		74 631		73 827		63 413		7 438		
% change			+ 34%		- 1%		- 14%		+ 21.5%		

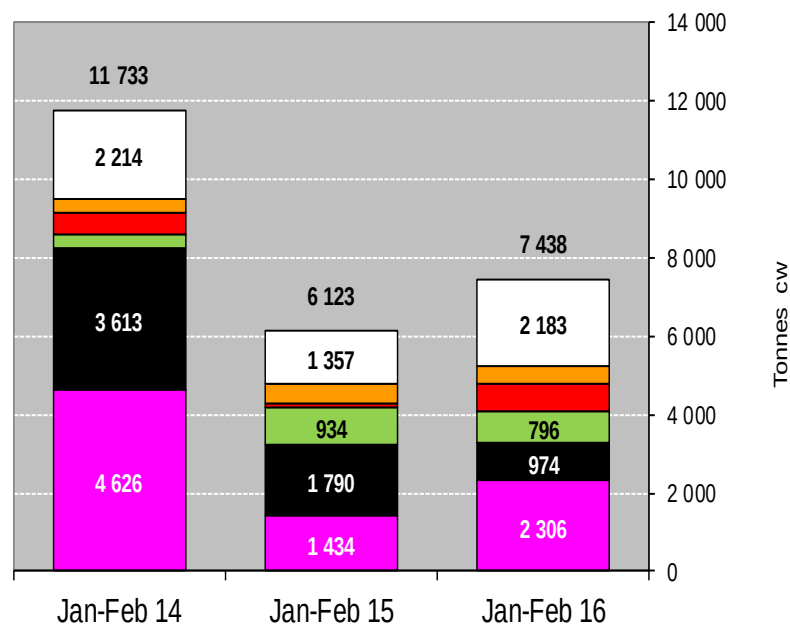
EU-28 Exports of Sheep and Goat products



EU exports of sheep & goatmeat and live animals

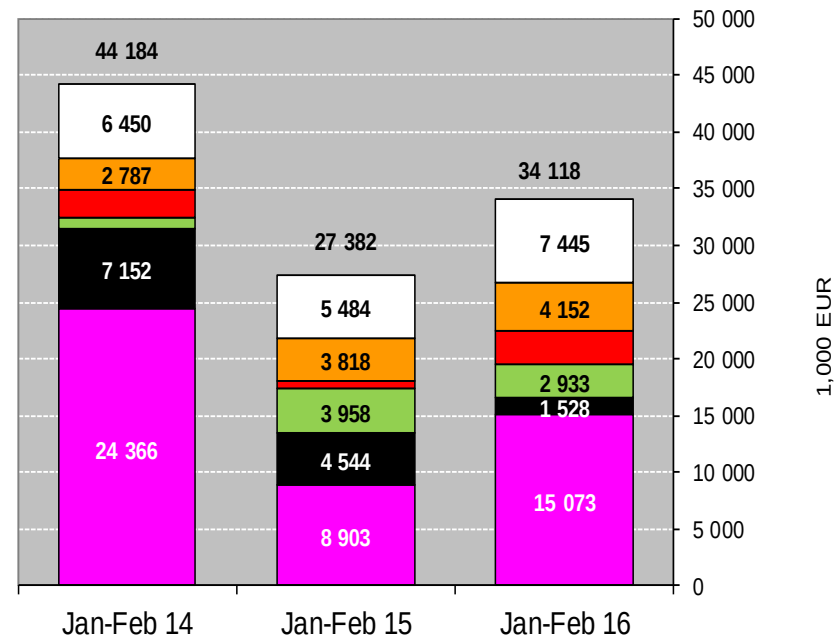
Trade figures (COMEXT)

EU EXPORTS of Sheep & Goat (Tonnes cwe)



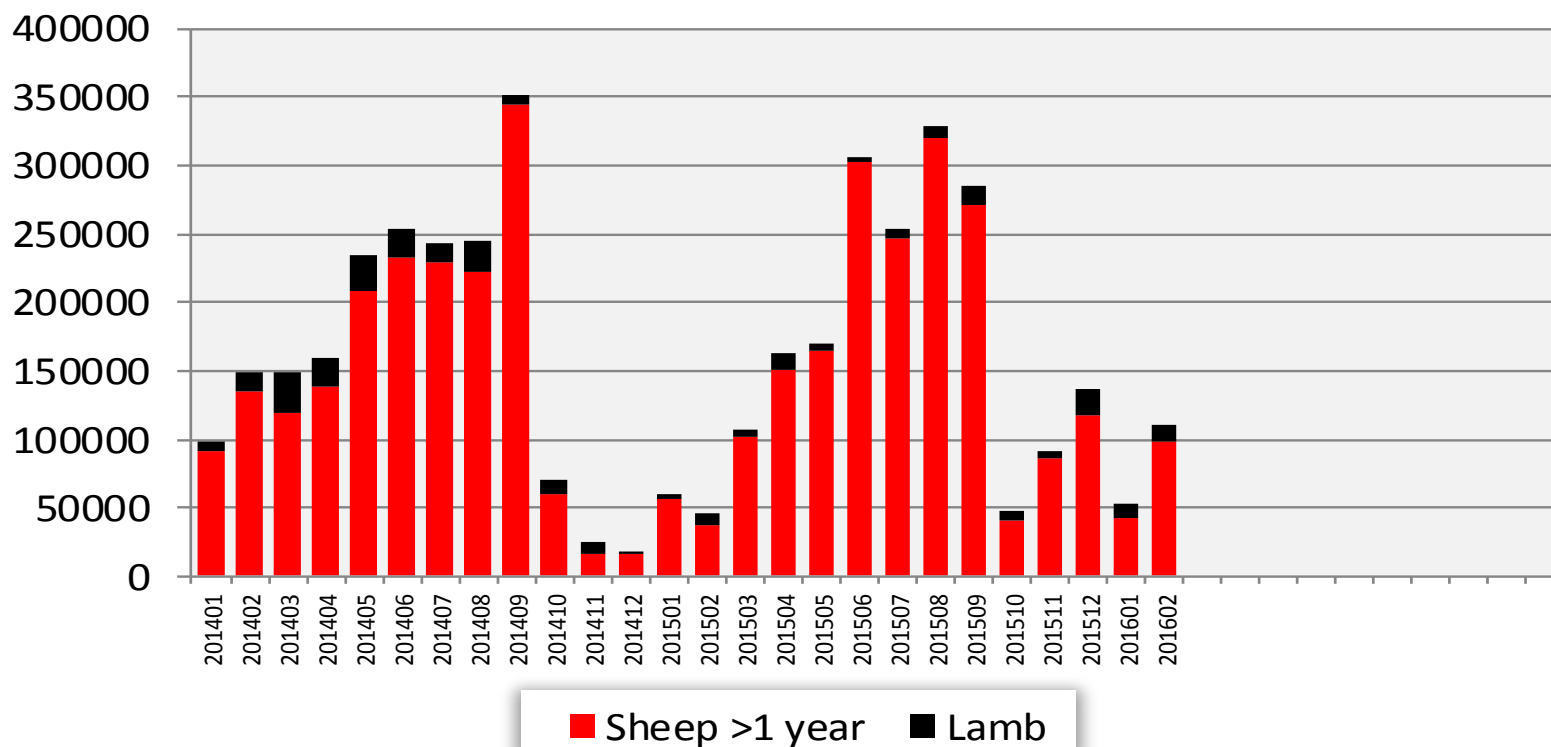
■ Libya ■ Hong Kong ■ Lebanon ■ Jordan ■ Switzerland □ Other destinations

EU EXPORTS of Sheep & Goat (1000 EUR)



■ Libya ■ Hong Kong ■ Lebanon ■ Jordan ■ Switzerland □ Other destinations

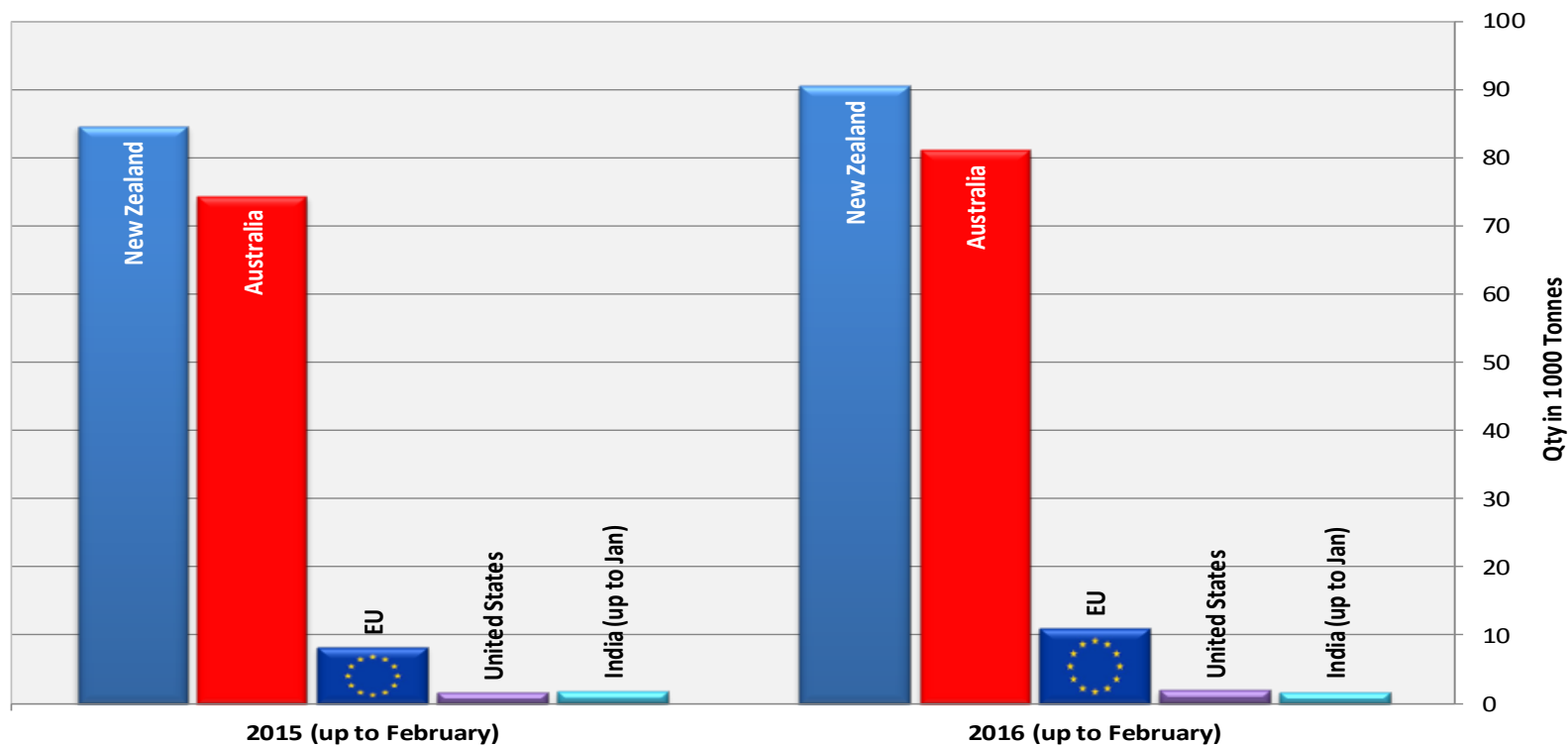
Export of live sheep, in heads (Excluding pure-bred breeding)



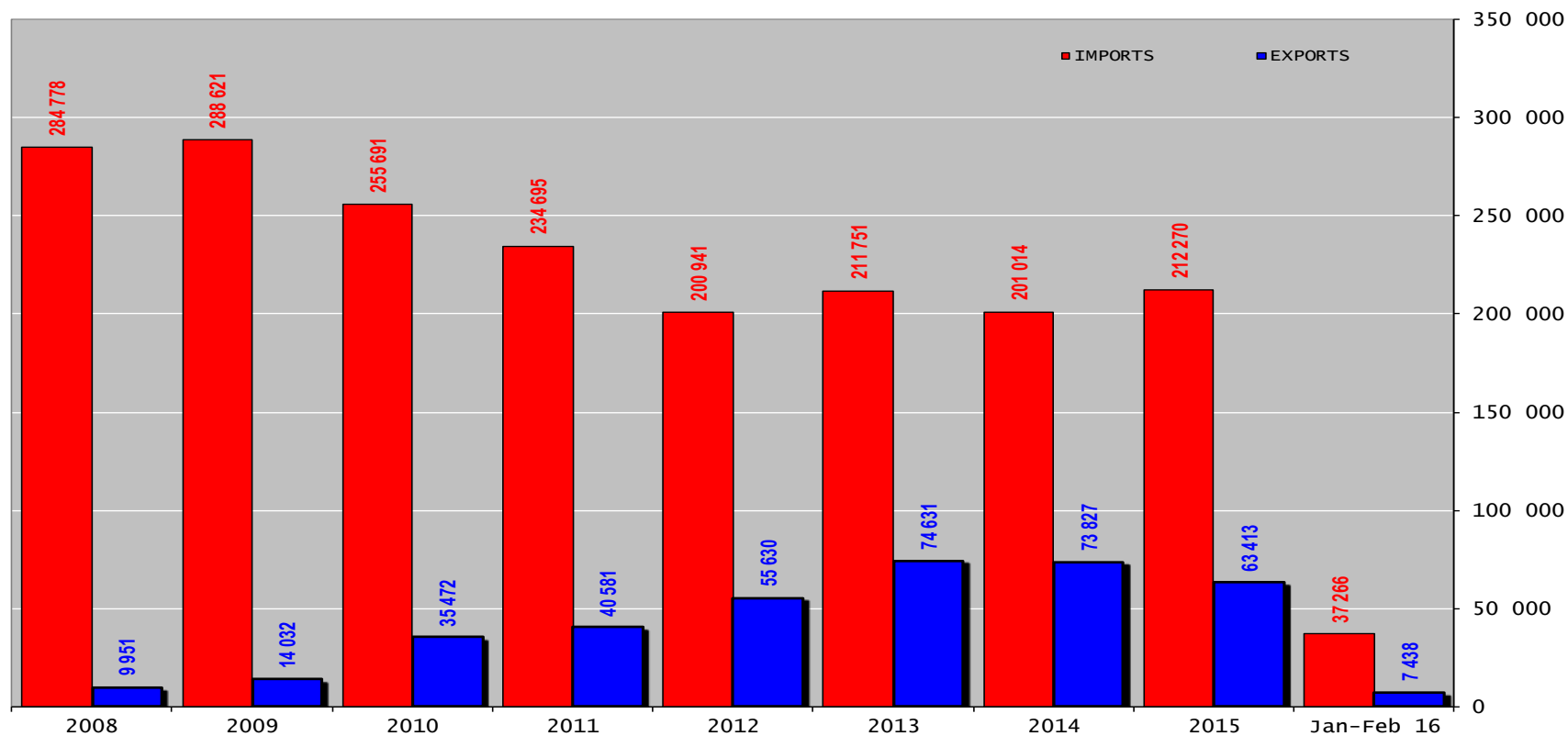
Main Exporters of SHEEP&GOAT Products (up to February)

Source : GTA & Eurostat

(excl. live animals)



■ EU Sheep and Goat Meat Trade Balance, tonnes cwe





Outlook

Estimates of APRIL 2016

FORECAST QUESTIONNAIRE - SHEEP LIVESTOCK BALANCE (Thousand Heads)

Change

	2011	2012	2013	2014	2015	2016(f)	15/14 %	16/15 %
Sheep numbers in December								
AT			357.4	349.0	353.0	355.0	+ 1.1%	+ 0.6%
BE	114.0	119.3	117.3	118.0	129.0	105.0	+ 9.3%	- 18.6%
BG	1 455.0	1 361.5	1 369.6	1 335.3	1 225.3	1 225.3	- 8.2%	+ 0.0%
CZ	209.0	221.0	220.0	225.0	230.0	230.0	+ 2.2%	+ 0.0%
DE	1 657.8	1 641.0	1 570.0	1 600.8	1 580.0	1 560.0	- 1.3%	- 1.3%
IE	3 321.0	3 354.9	3 324.0	3 324.9	3 325.0	3 325.0	+ 0.0%	+ 0.0%
EL	9 781.0	9 587.0	9 520.0	8 948.0	8 948.0	9 216.0	+ 0.0%	+ 3.0%
ES	20 164.0	17 394.0	16 609.0	16 572.0	16 361.0	16 882.0	- 1.3%	+ 3.2%
FR	7 621.0	7 453.0	7 193.0	7 168.0	7 057.0	6 940.0	- 1.5%	- 1.7%
HR	369.0	679.0	620.0	605.0	535.0	547.7	- 11.6%	+ 2.4%
HU	1 120.0	1 185.0	1 214.0	1 185.0	1 190.0	1 200.0	+ 0.4%	+ 0.8%
IT	7 942.6	7 015.7	7 181.8	7 166.0	7 148.5	7 204.4	- 0.2%	+ 0.8%
LV		83.8	84.8	92.6	109.4	126.9	+ 18.1%	+ 16.0%
NL	1 113.0	1 093.0	1 074.0	1 070.0	1 000.0	1 000.0	- 6.5%	+ 0.0%
PL	212.7	218.5	200.0	190.0	180.0	180.0	- 5.3%	+ 0.0%
PT	2 169.9	2 091.7	2 073.7	2 032.6	2 021.0	2 021.0	- 0.6%	+ 0.0%
SK	393.9	399.1	389.4	377.4	372.5	376.0	- 1.3%	+ 0.9%
FI	129.0	130.0	135.5	140.0	145.0	145.0	+ 3.6%	+ 0.0%
UK	21 895.0	23 028.0	22 027.0	22 686.0	23 102.0	23 300.0	+ 1.8%	+ 0.9%
Total	79 667.9	77 055.6	75 280.5	75 185.7	75 011.6	75 939.2		
Change		- 3.3%	- 2.3%	- 0.1%	- 0.2%	+ 1.2%	- 0.2%	+ 1.2%

Red cells - No communication received - Same data last forecast group used

Estimates of APRIL 2016

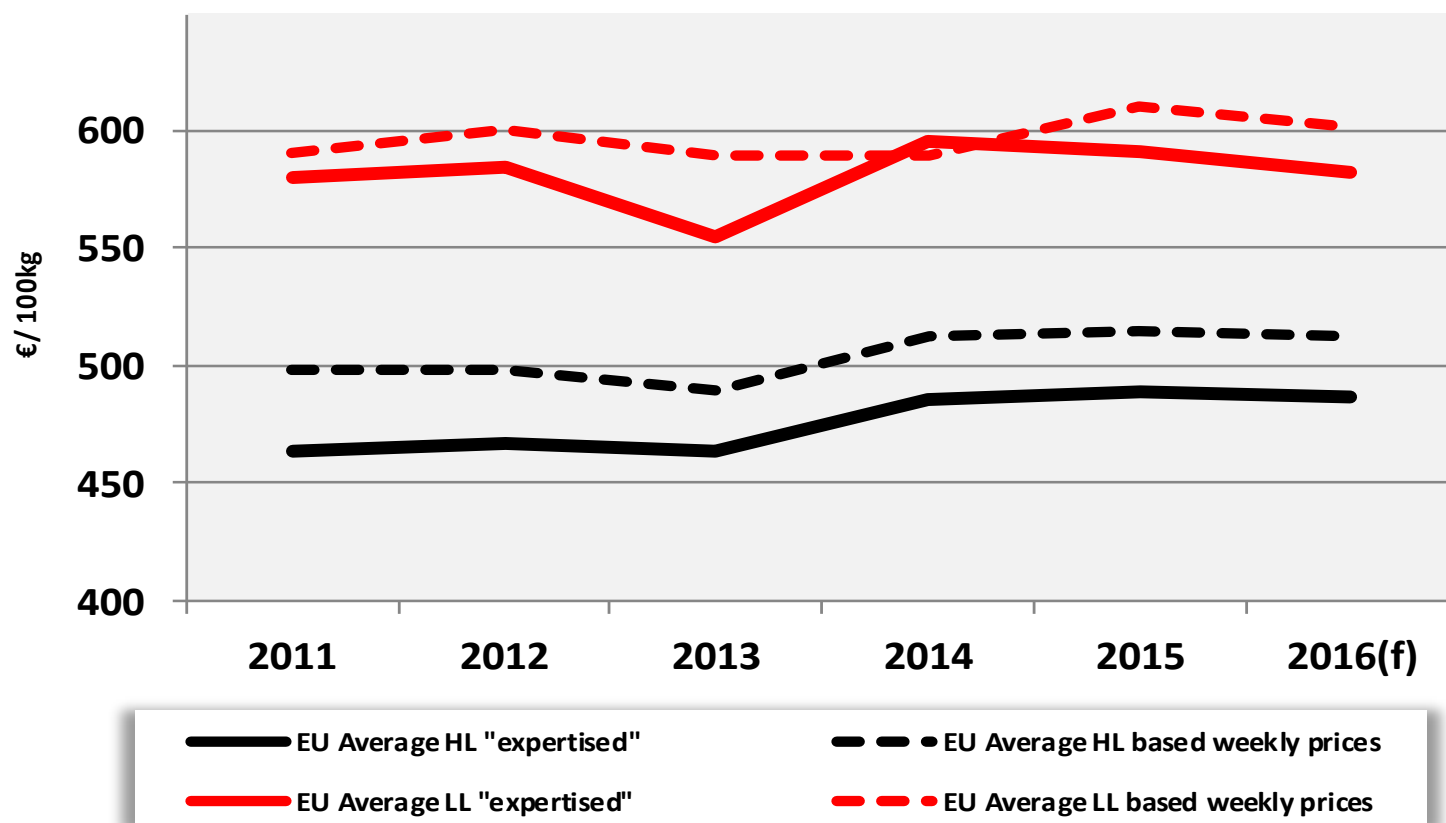
FORECAST QUESTIONNAIRE - SHEEP AND GOAT MEAT (Thousand Tonnes)

Change

	2011	2012	2013	2014	2015	2016(f)	15/14 %	16/15 %
GIP/ PIB/ BEE								
AT				8.0	8.0	8.0	+ 0.0%	+ 0.0%
BE	0.7	0.5	0.6	0.8	0.5	0.5	- 34.9%	+ 0.0%
BG	13.1	13.3	13.4	10.1	9.1	9.4	- 9.6%	+ 3.3%
CZ	2.4	2.5	2.5	2.6	2.6	2.6	+ 0.0%	+ 0.0%
DE	42.0	38.6	34.4	31.1	31.5	31.0	+ 1.1%	- 1.4%
IE	39.0	45.2	49.9	51.5	52.4	55.0	+ 1.7%	+ 5.0%
EL	105.0	100.0	98.0	80.0	72.0	78.0	- 10.0%	+ 8.3%
ES	149.1	146.6	150.2	136.6	147.9	157.9	+ 8.3%	+ 6.8%
FR	96.4	91.2	86.7	86.8	86.9	85.3	+ 0.1%	- 1.8%
HR	6.3	6.4		6.9	7.4	8.0	+ 7.3%	+ 8.1%
HU	9.6	9.6	8.6	9.3	9.2	9.1	- 1.2%	- 2.0%
IT	30.8	30.8	20.3	10.4	20.1	20.7	+ 93.5%	+ 3.0%
LV								
NL	16.8	16.7	16.4	16.7	16.3	16.3	- 2.4%	+ 0.0%
PL	3.1	3.0	3.0	3.0	2.9	2.9	- 3.2%	+ 1.5%
PT	19.9	18.1	17.0	18.0	19.0	19.0	+ 5.6%	+ 0.0%
SK	1.6	1.7	1.8	1.9	1.5	1.5	- 21.7%	+ 0.0%
FI	1.0	0.9	1.0	1.0	1.1	1.1	+ 7.8%	+ 0.0%
UK	300.0	285.7	300.0	306.0	308.0	314.0	+ 0.7%	+ 1.9%
	Total	836.6	810.8	803.8	780.7	796.4	820.3	
	EU tonnes		- 3.1%	- 0.9%	- 2.9%	+ 2.0%	+ 3.0%	+ 2.0%

Red cells - No communication received - Same data last forecast group used

Price forecast for Heavy and Light Lambs (based on the expertised and weekly data)



Sheep & goat meat production balance (2016 forecasted by experts)

Missing - CZ-CY-DK-EE-LT-
LU-MT-NL-RO-SI-FI-SE

