

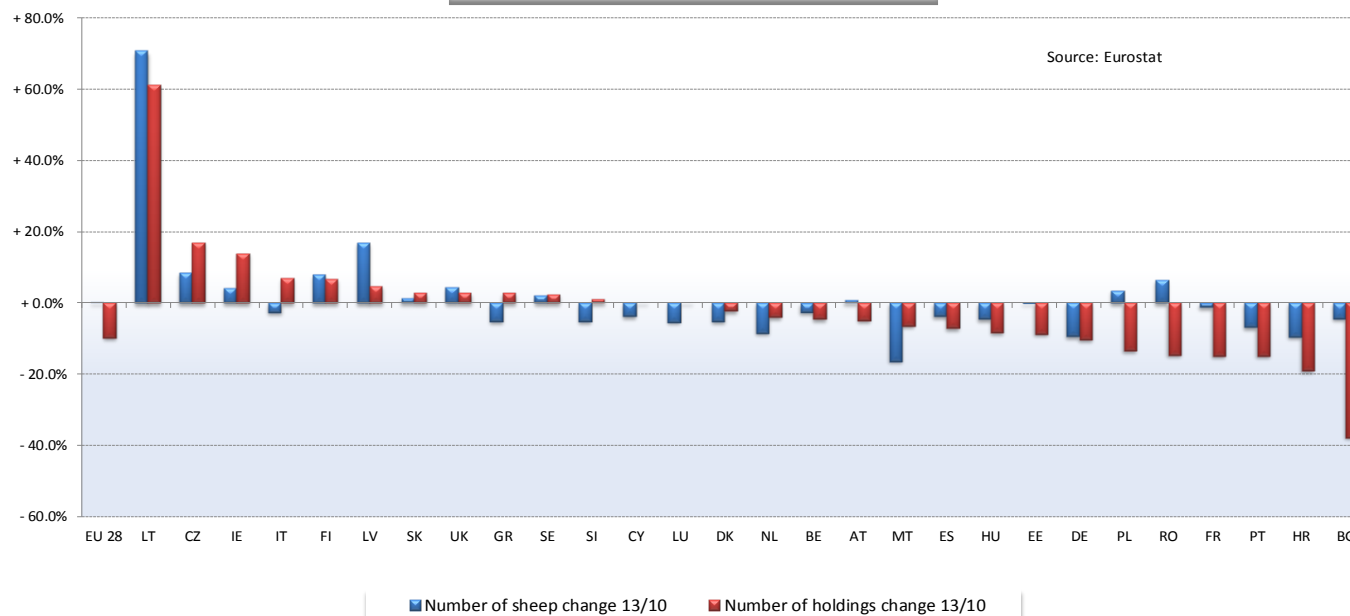


SHEEP FORECAST WORKING GROUP
Market Situation for Sheep & Goats
21 November 2016

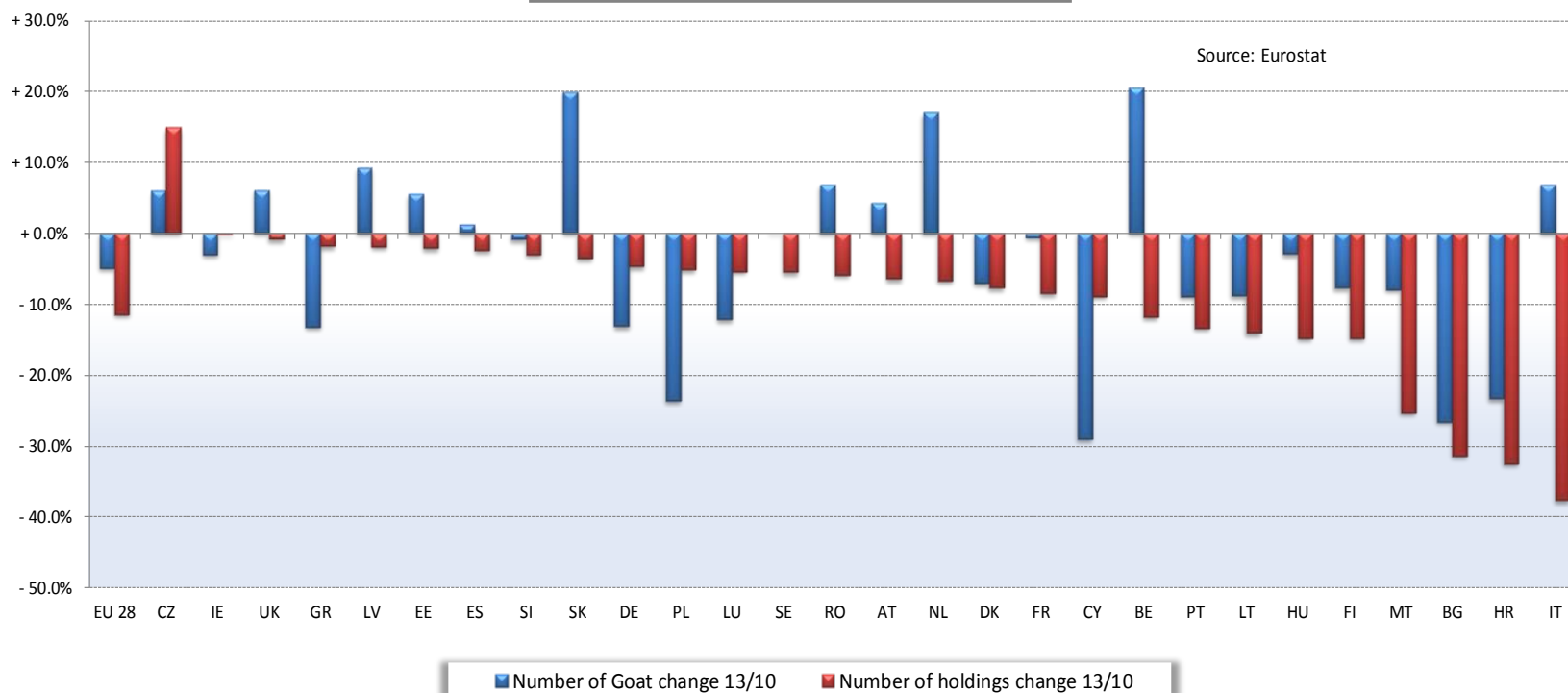


Production

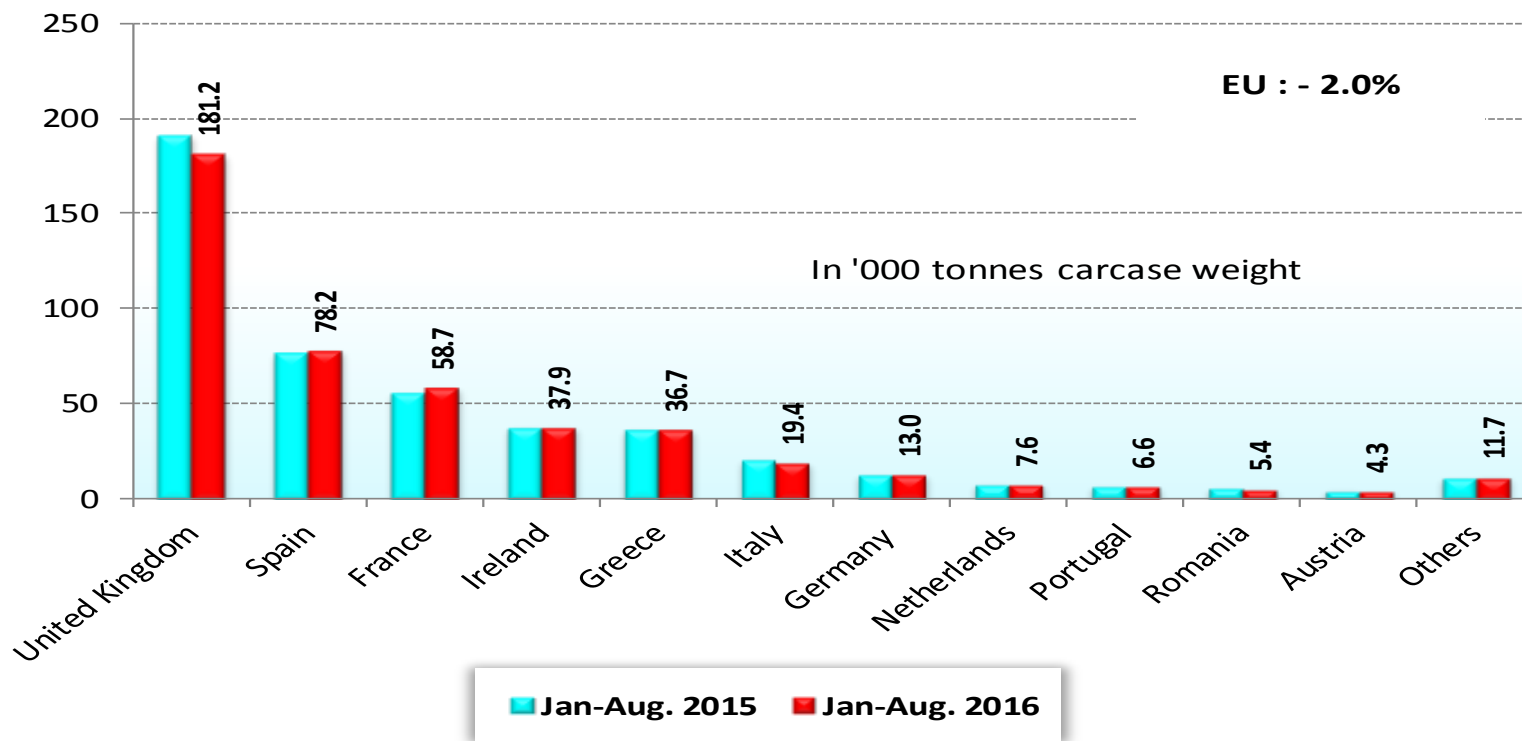
Farm Structure Survey Change in number of sheep and holdings



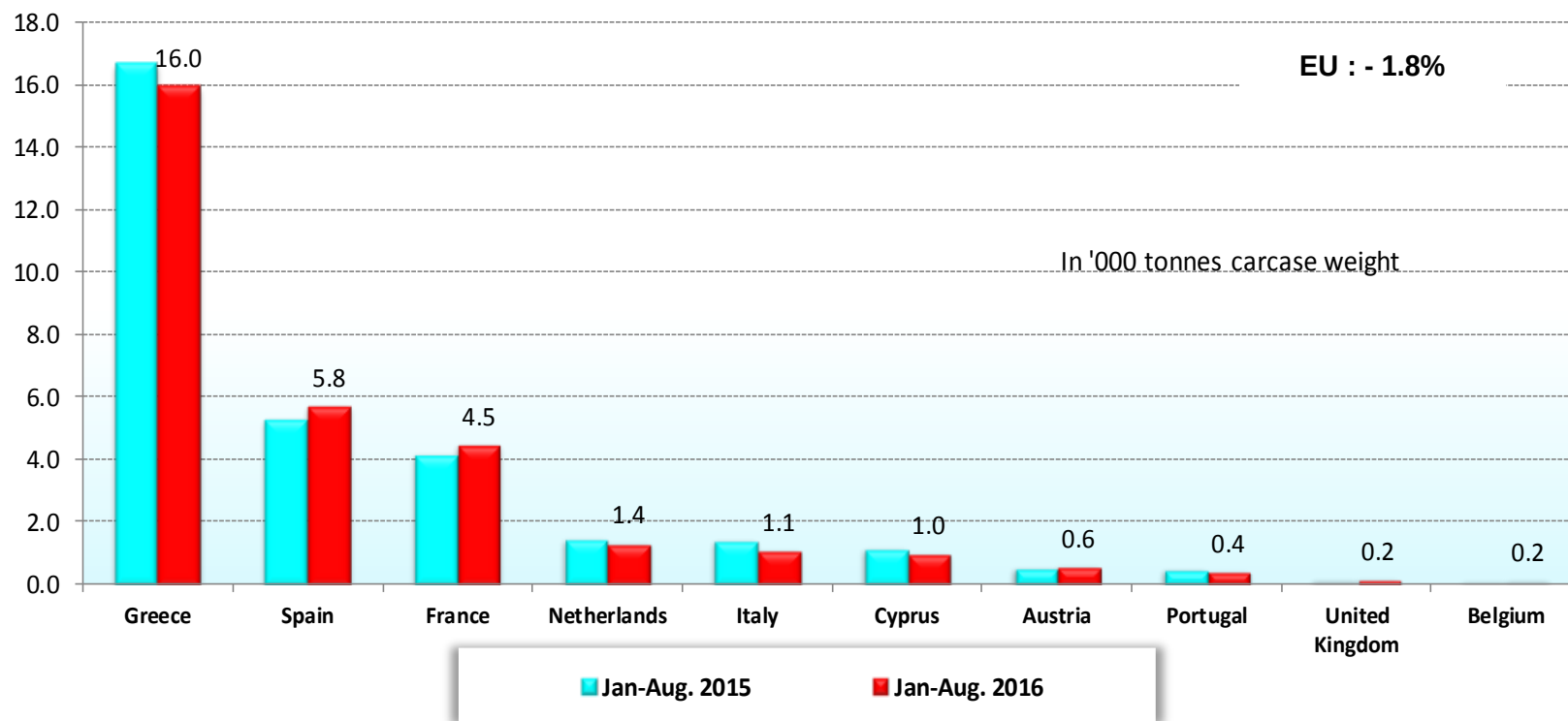
Farm Structure Survey Change in number of goats and holdings



Change in Sheep Slaughtering 2015/2016 (up to August)



Change in Goat Slaughtering 2015/2016 (up to August)

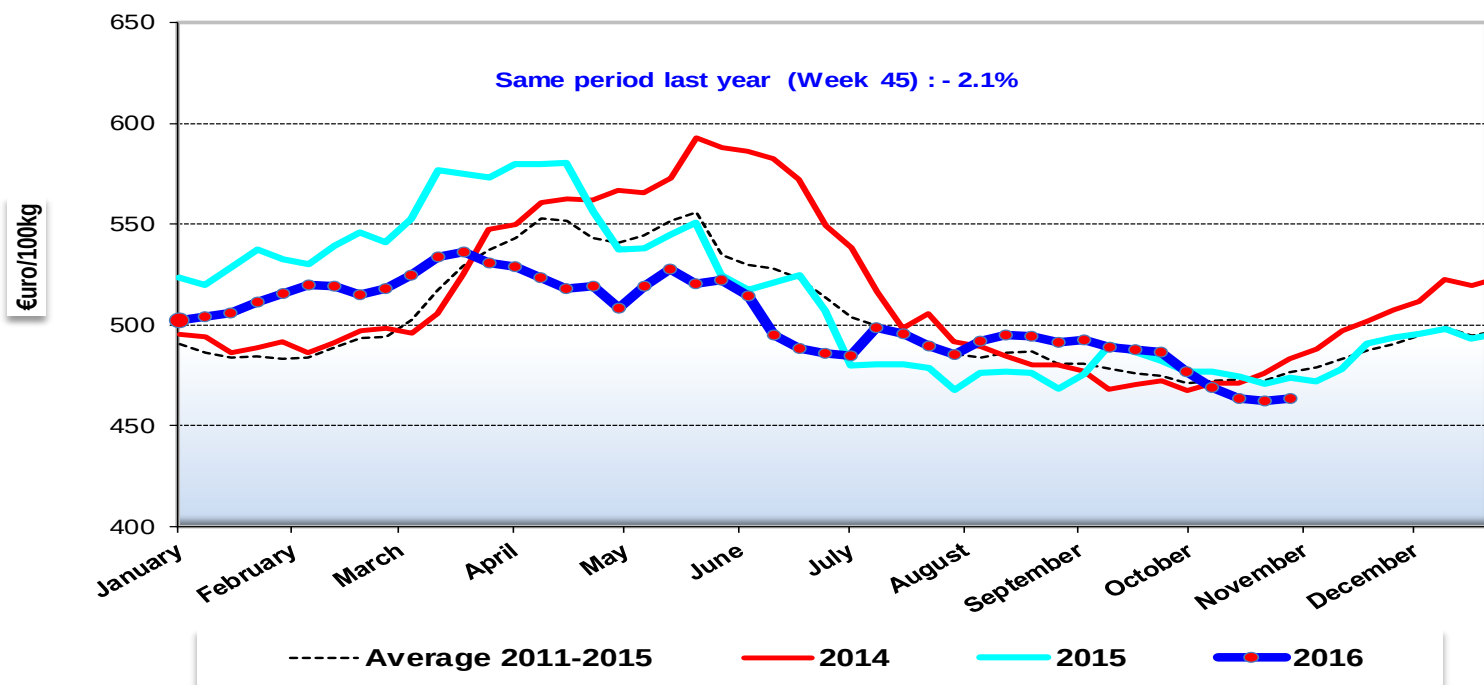




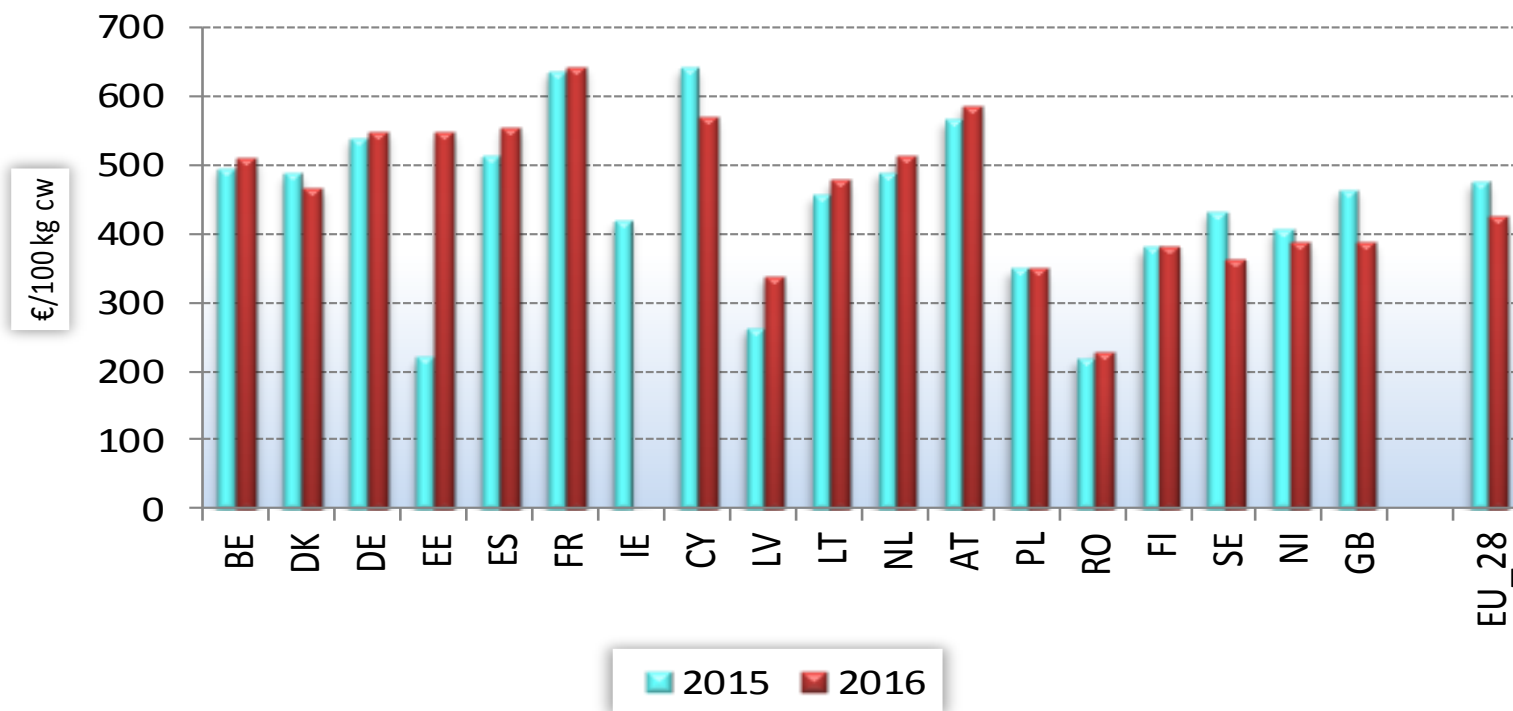
Prices

Evolution **heavy** lamb prices in the EU

Latest price (Week 45) : 463.45 EUR/100 kg

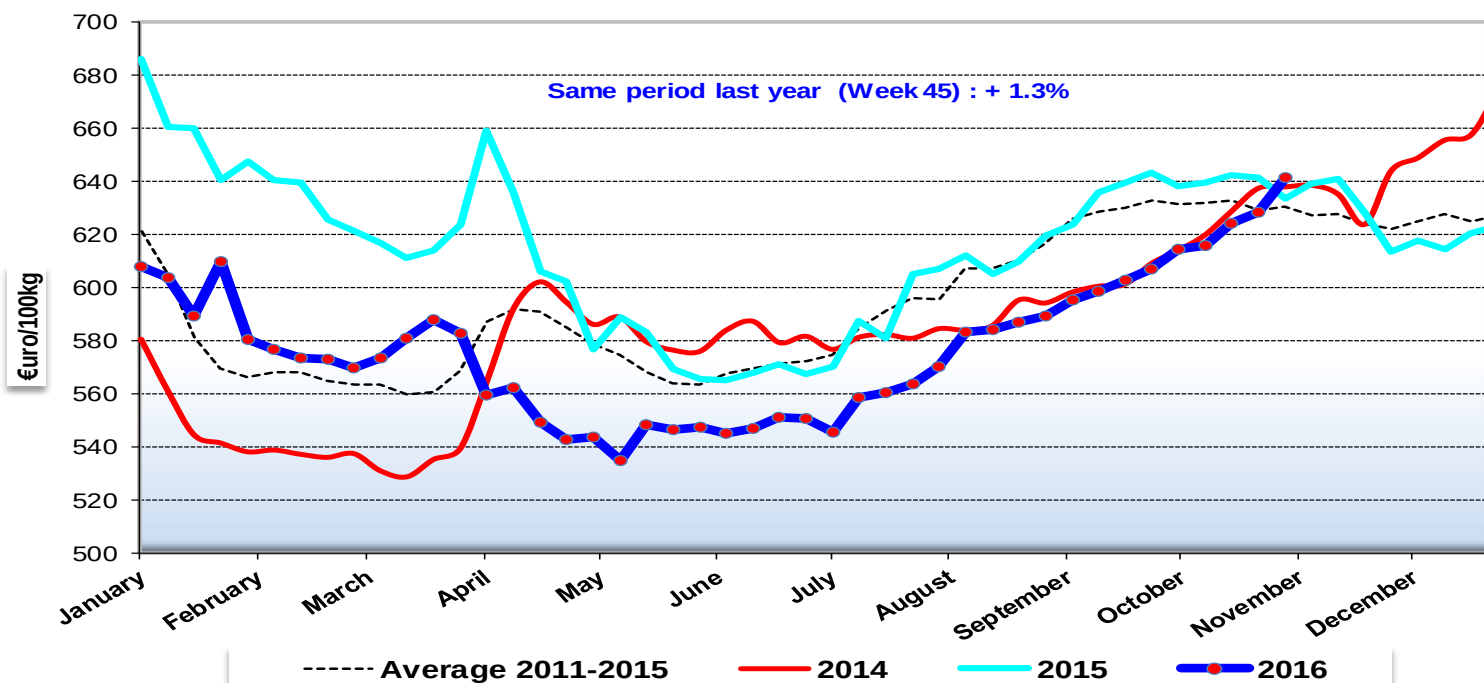


Heavy lamb prices (week 45)

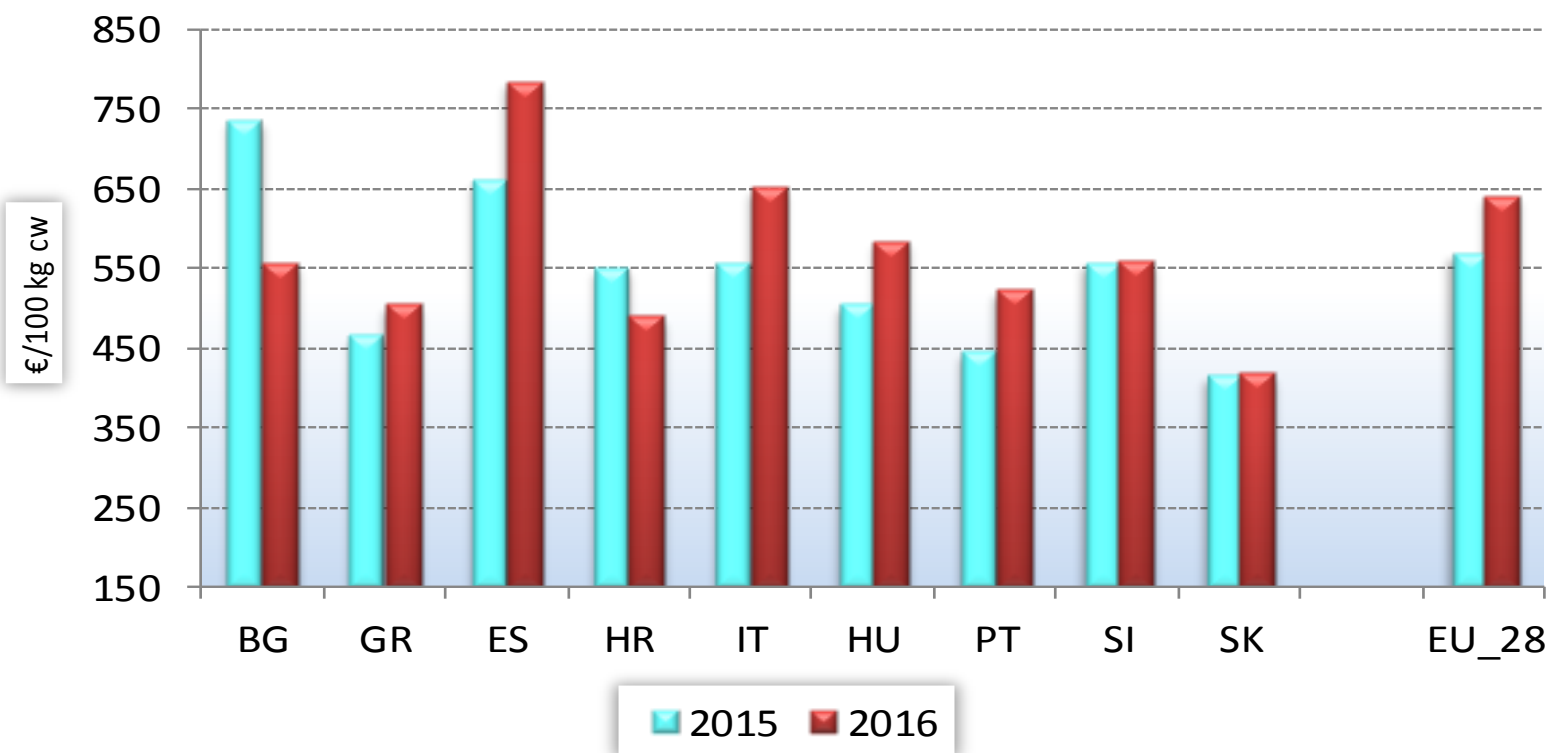


Evolution **light** lamb prices in the EU

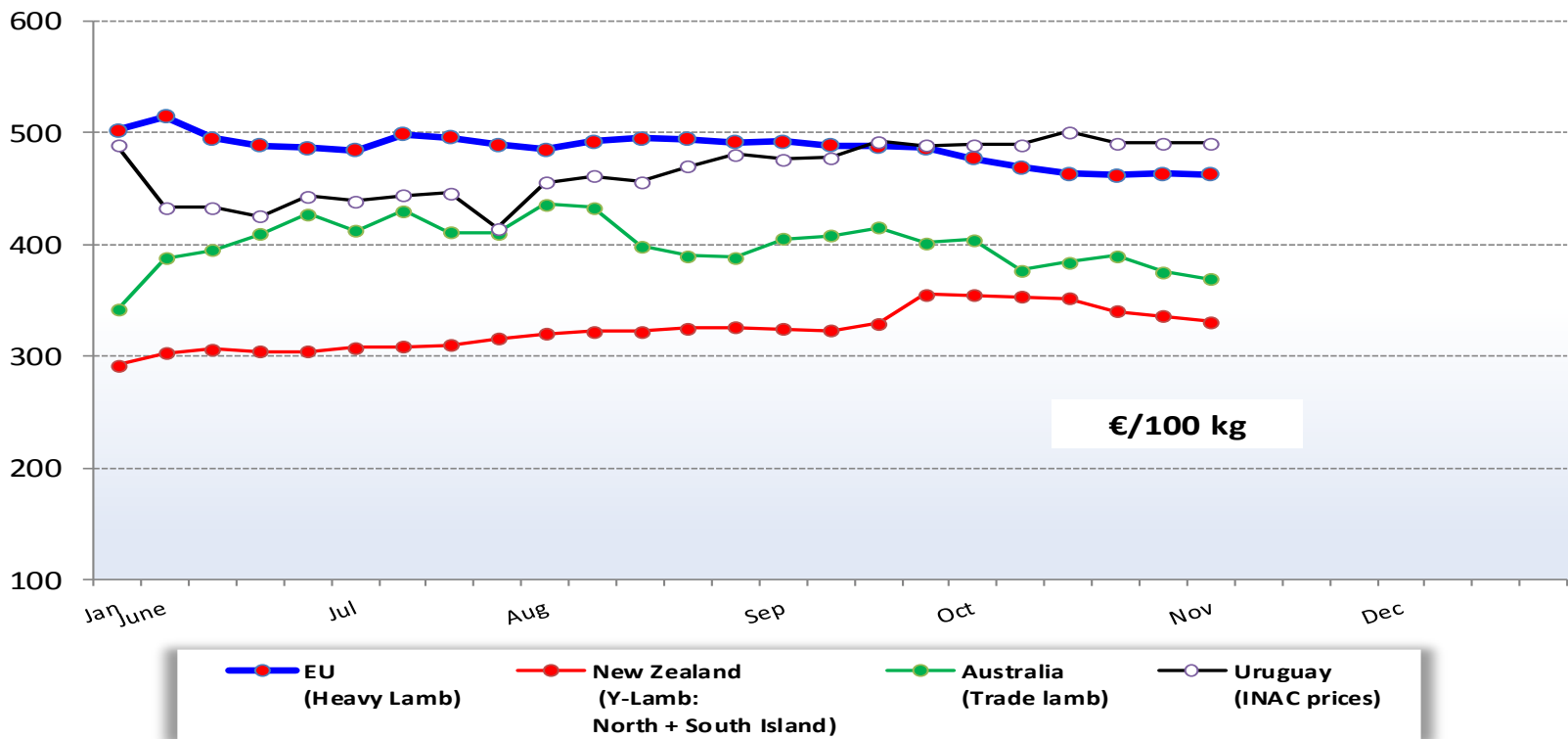
Latest price (Week 45) : 641.51 EUR/100 kg



Light lamb prices (week 45)



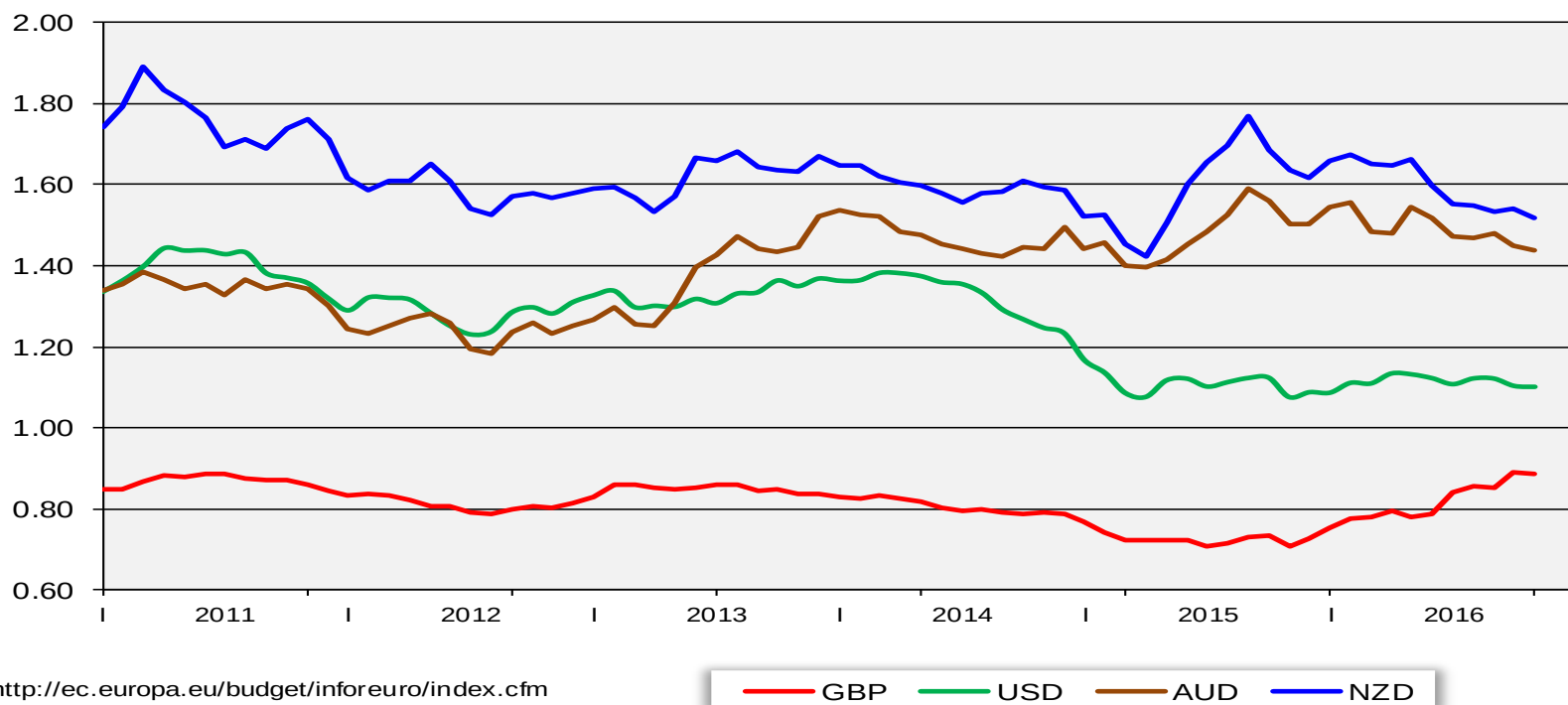
Market Prices (2016)





Trade

EXCHANGE RATE





EU import of sheep & goat meat and live animals

Trade figures (Comext)

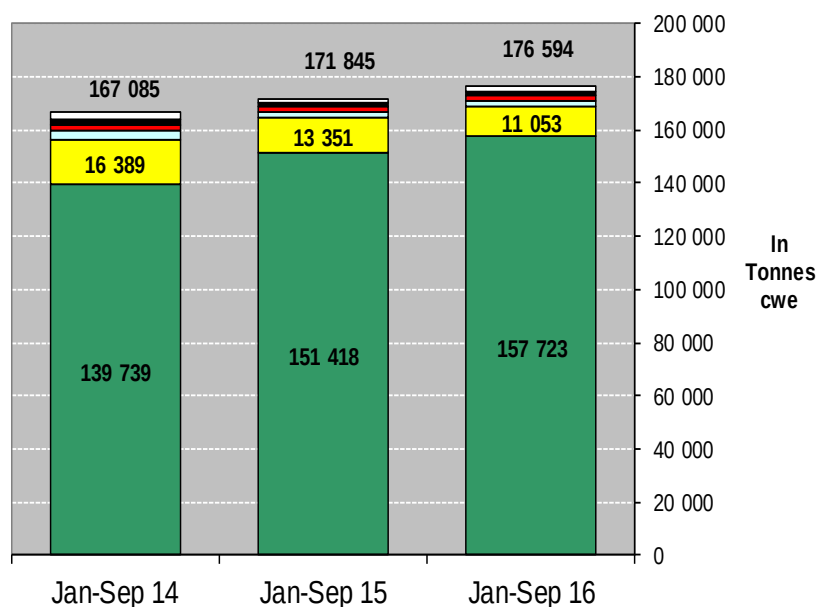
IMPORT

	2012		2013		2014		2015		Jan-Sep 16		Compared to Jan-Sep 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
New Zealand	170 089	84.9%	178 725	84.6%	165 934	82.5%	182 218	85.8%	157 723	89.3%	+ 4.2%
Australia	17 631	8.8%	19 645	9.3%	21 407	10.6%	20 672	9.7%	11 053	6.3%	- 17.2%
Chile	3 226	1.6%	3 983	1.9%	3 628	1.8%	2 525	1.2%	2 267	1.3%	+ 6.6%
For.JRep.Mac	2 024	1.0%	2 218	1.0%	2 488	1.2%	1 945	0.9%	2 010	1.1%	+ 11.1%
Uruguay	3 504	1.7%	3 264	1.5%	3 278	1.6%	1 740	0.8%	1 100	0.6%	- 17.3%
Argentina	1 944	1.0%	1 115	0.5%	1 604	0.8%	671	0.3%	903	0.5%	+ 43.8%
Iceland	1 102	0.5%	1 441	0.7%	1 798	0.9%	1 766	0.8%	897	0.5%	+ 93.8%
Falkland Is.	616	0.3%	740	0.4%	789	0.4%	670	0.3%	585	0.3%	- 12.7%
Other Origins	895	0.4%	904	0.4%	880	0.4%	773	0.4%	641	0.4%	+ 34.8%
Extra-EU	200 414		211 296		201 018		212 311		176 594		
% change			+ 5%		- 5%		+ 6%		+ 2.8%		

EU imports of sheep & goatmeat and live animals

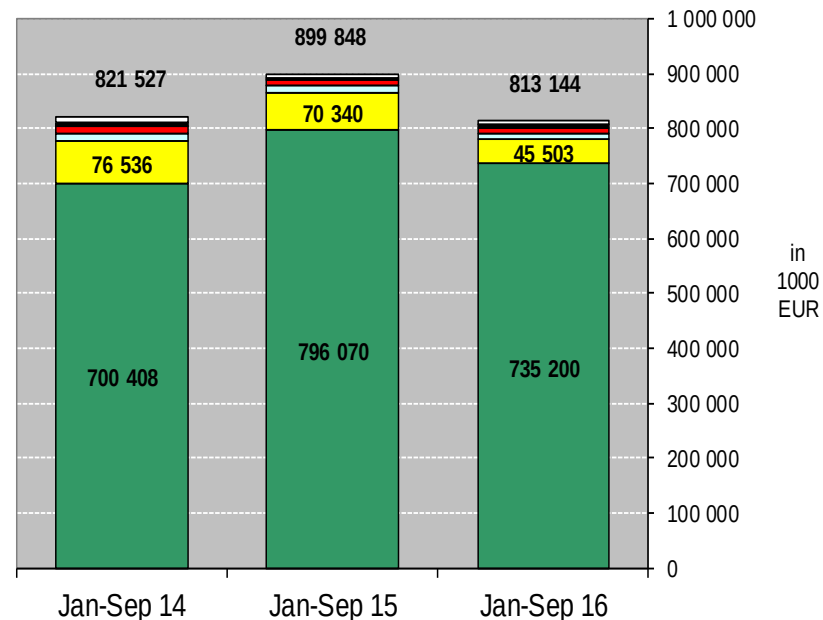
Trade figures (COMEXT)

EU IMPORTS of Sheep & Goat (Tonnes cwe)



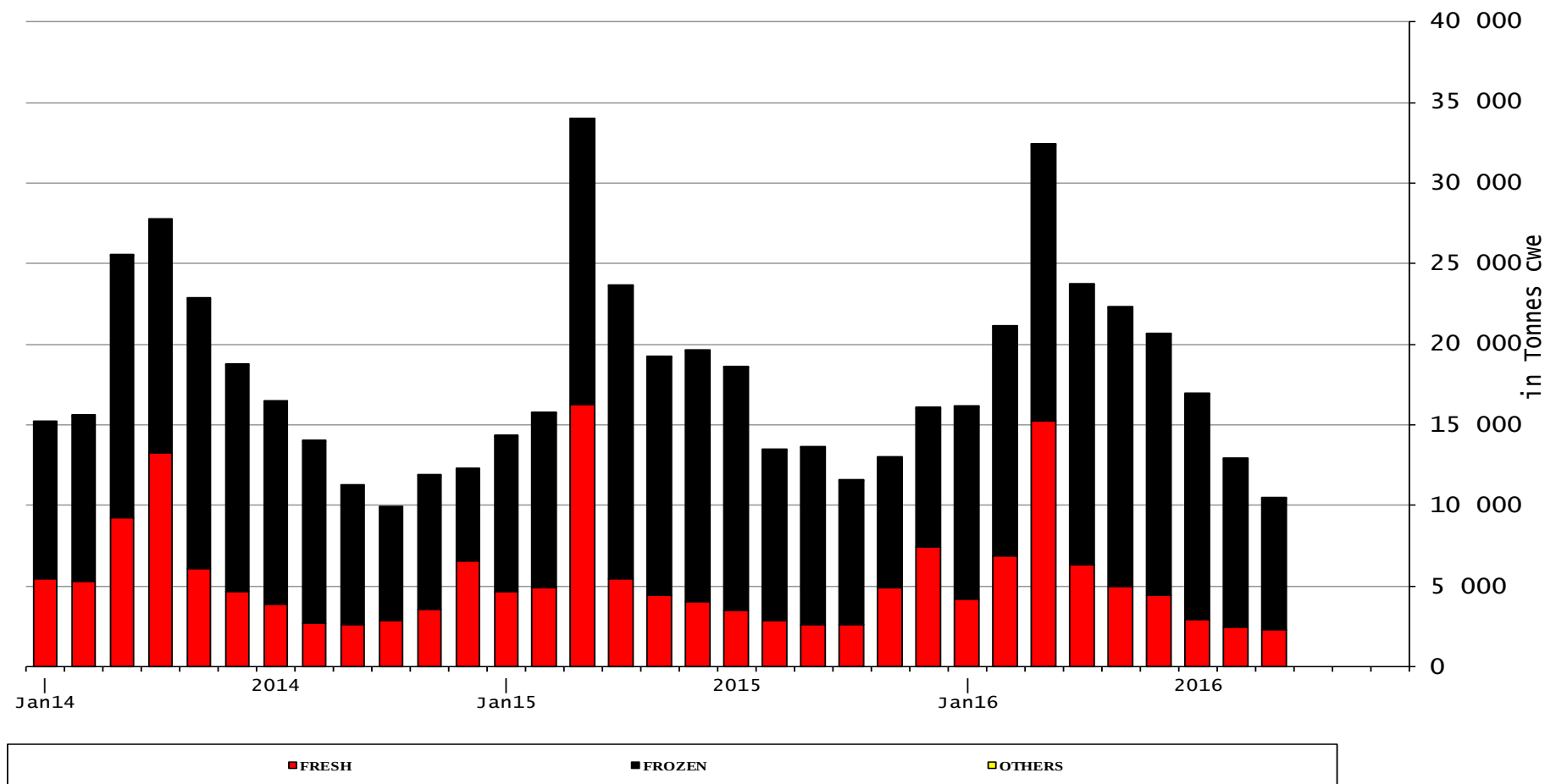
■ New Zealand ■ Australia ■ Chile ■ For.JRep.Mac ■ Uruguay ■ Other origins

EU IMPORTS of Sheep & Goat (1000 EUR)



■ New Zealand ■ Australia ■ Chile ■ For.JRep.Mac ■ Uruguay ■ Other origins

EU-28 Imports of Sheep and Goat products



UTILISATION OF SHEEPMEAT AND GOATMEAT TARIFF QUOTAS IN 2016

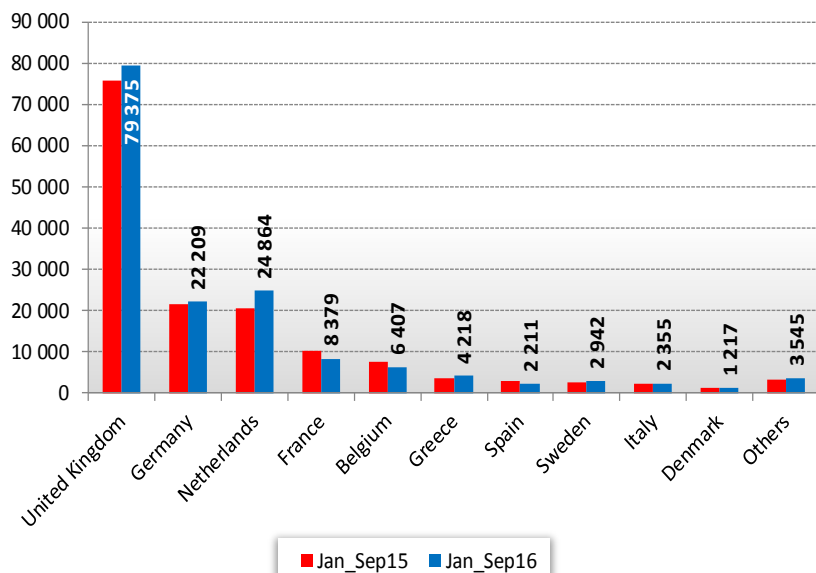
EU-28 : **January > December 2016**

Reg. 1354/2011

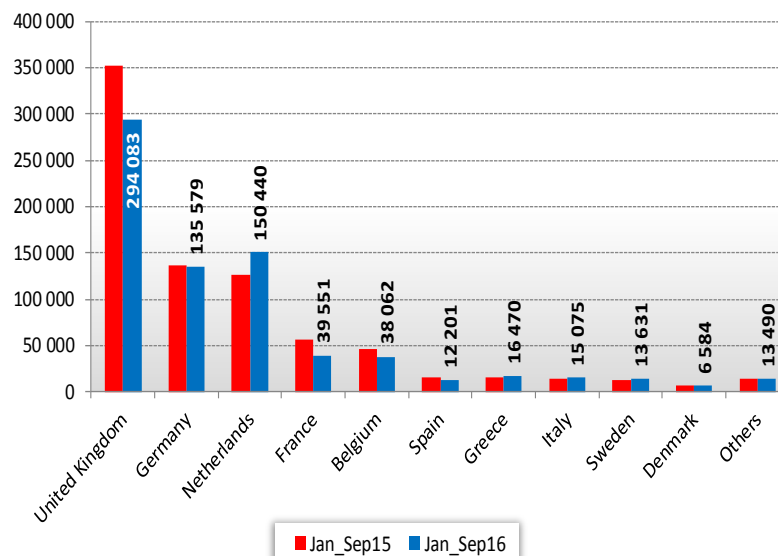
COUNTRY GROUP No	CN CODES	ORIGIN	ORDER NUMBER	Period: 01/01/2016 - 01/11/2016 Unit: tonnes cwe				
				Annual quota	Balance (remaining amount)	Actual import	Quota use %	Period: 01/01/2015 - 31/12/2015
1	0204	Argentina	09.2011	23 000	22 203	797	3%	534
		Australia	09.2012	19 186	6 430	12 756	66%	16 493
		New Zealand	09.2013	228 254	69 077	159 177	70%	174 540
		Uruguay	09.2014	5 800	4 496	1 304	22%	1 785
		Chile	09.1922	7 600	5 231	2 369	31%	2 503
		Norway	09.0781	300	299	1	0%	0
		Greenland	09.0693	100	100	0	0%	0
		Faeroes	09.0690	20	20	0	1%	1
		Turkey	09.0227	200	200	0	0%	0
		Others	09.2015	200	200	0	0%	0
		Erga Omnes	09.2016	200	14	186	93%	195
2	0204 0210 99 21 0210 99 29 0210 99 60	Iceland	09.0790	1 850	534	1 316	71%	1 093
3	0104 10 30 0104 10 80 0104 20 90	Erga Omnes	09.2019	92	92	0	0%	0
TOTAL				286 802	108 896	177 906	62%	197 144

Evolution NZ Exports of sheep meat in MS

NZ Exports to MS
(In tonnes cw)

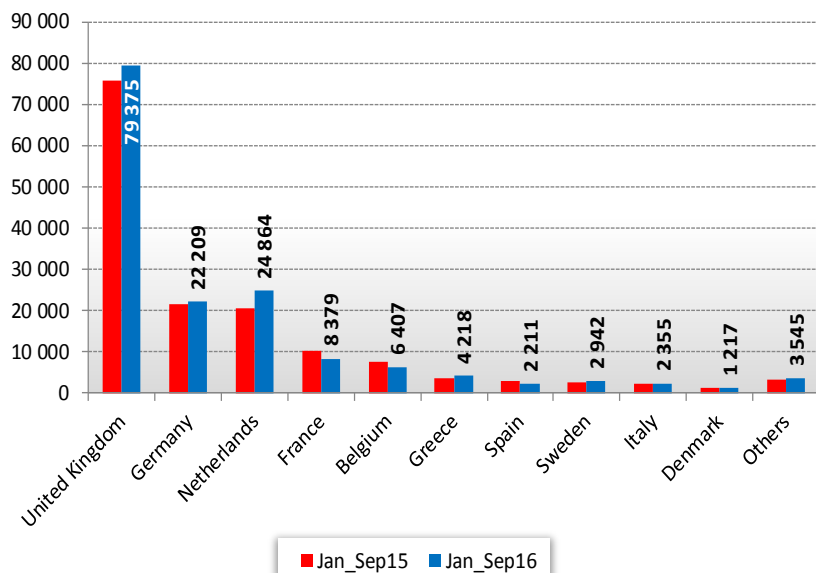


NZ Exports to MS
(In 1000 €)

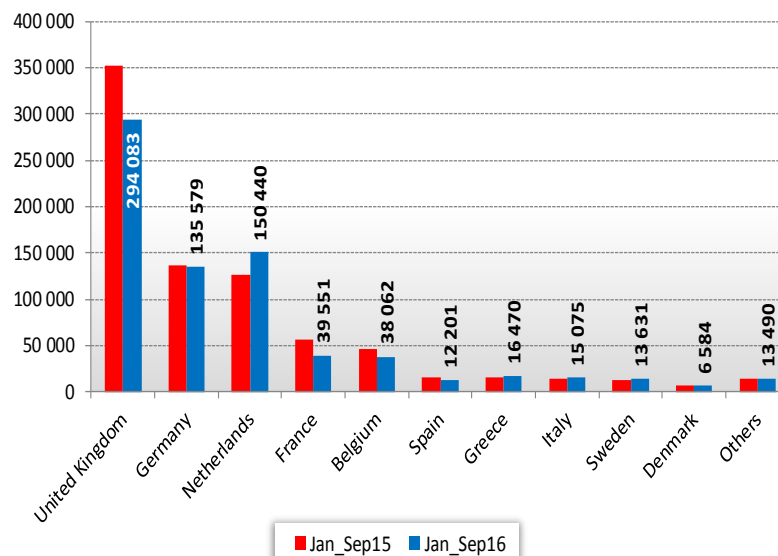


Evolution NZ Exports of sheep meat in MS

NZ Exports to MS
(In tonnes cw)

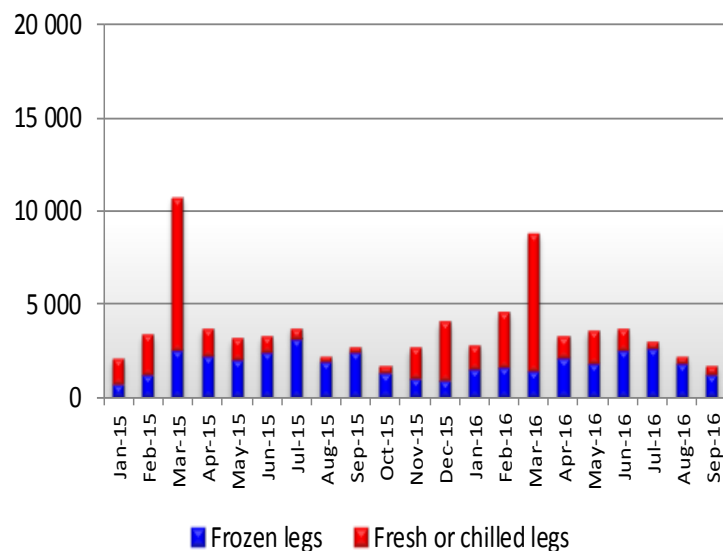


NZ Exports to MS
(In 1000 €)

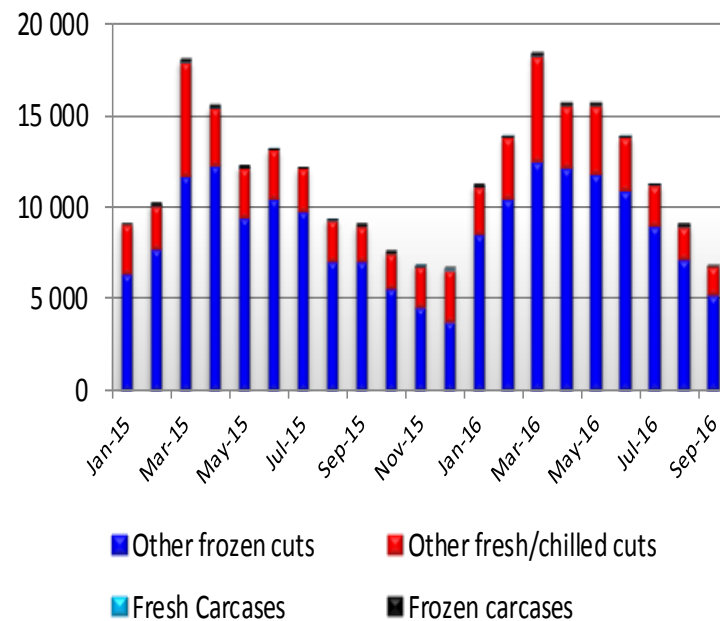


Evolution NZ Exports of sheep meat products in EU (in tonnes cw)

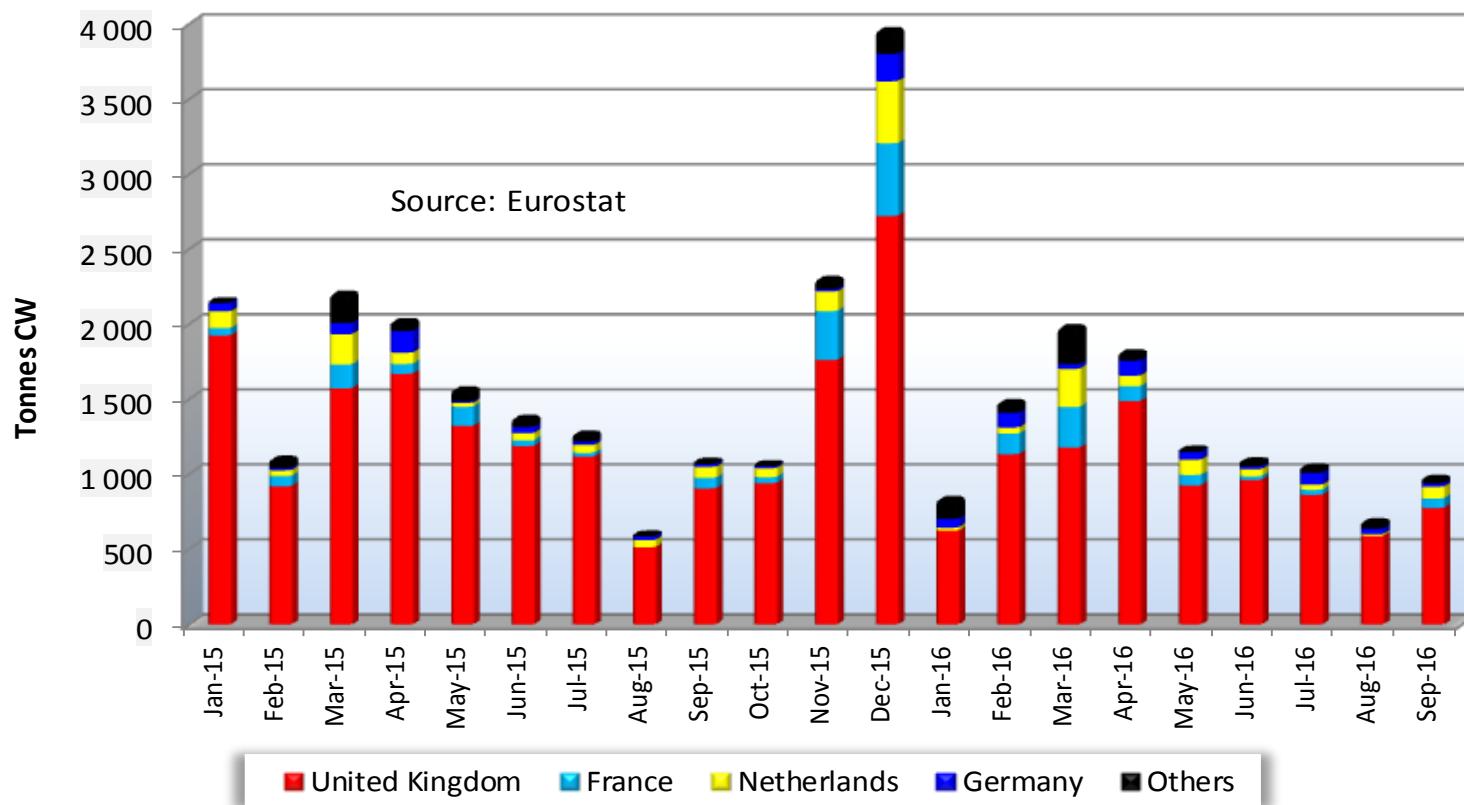
Sheep legs



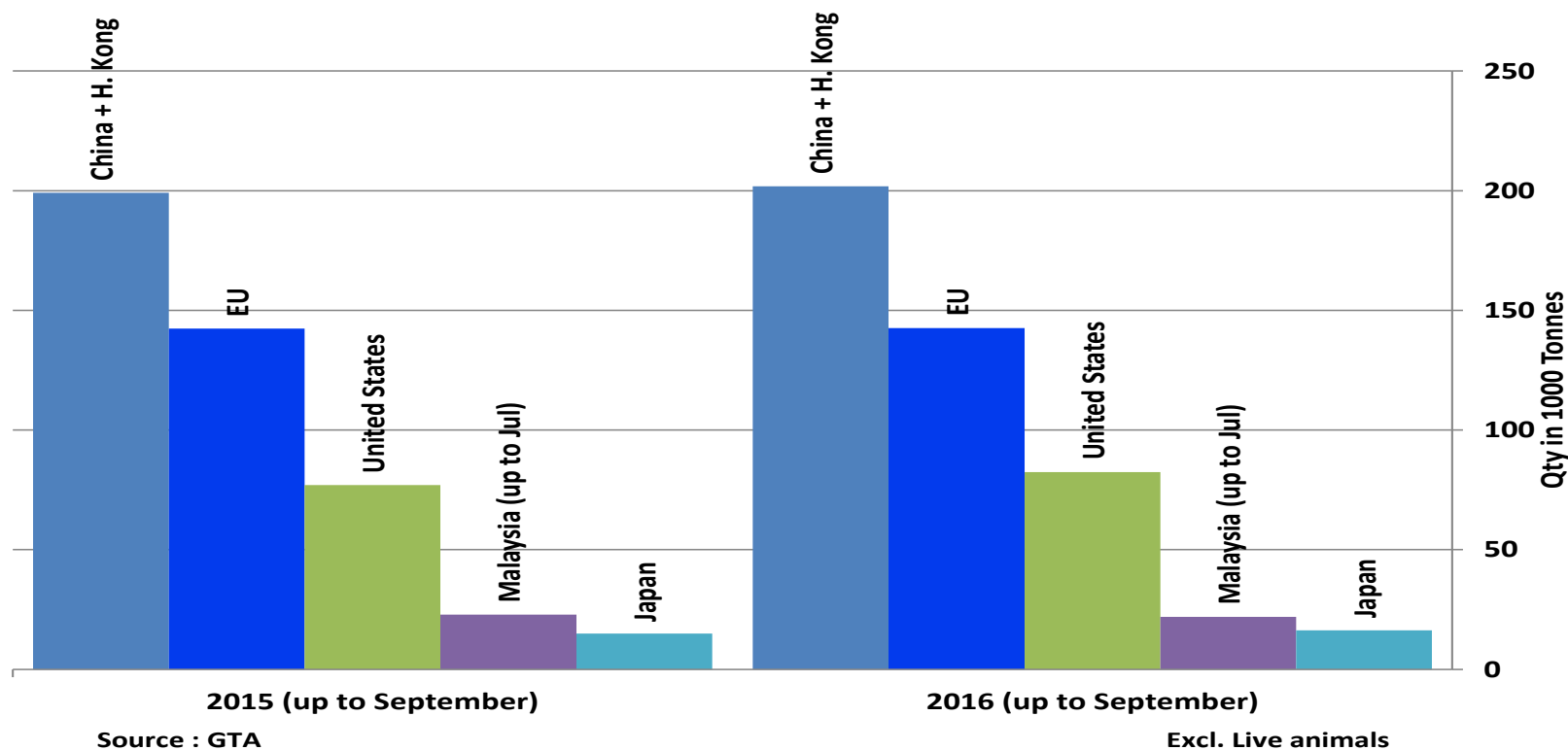
Other meat products



Evolution AUS exports of sheep meat to the EU



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



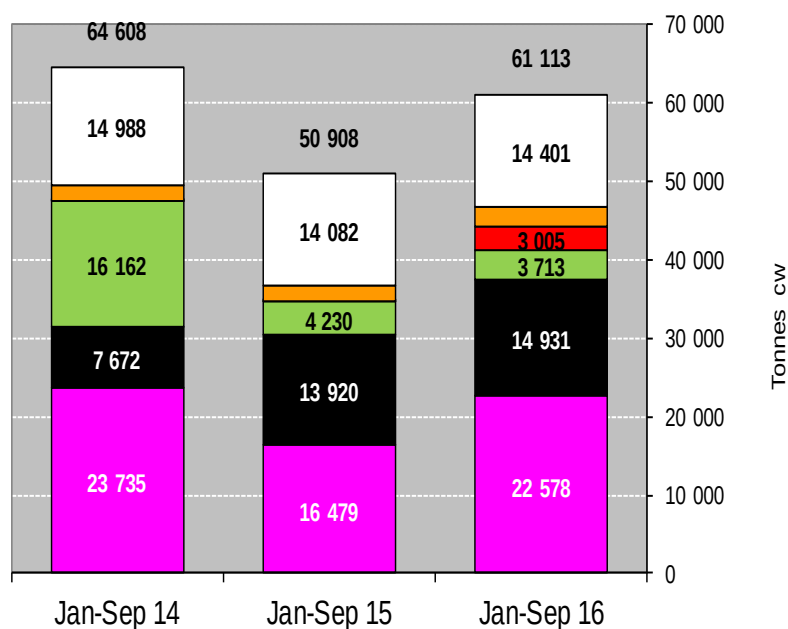
EU exports of sheep & goat meat and live animals: Trade figures (COMEXT – tonnes cwe)

	2012		2013		2014		2015		Jan-Sep 16		Compared to Jan-Sep 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Libya	13 562	24.0%	23 466	31.4%	25 122	34.0%	21 170	33.5%	22 578	36.9%	+ 37.0%
Jordan	5 860	10.4%	7 036	9.4%	7 834	10.6%	14 405	22.8%	14 931	24.4%	+ 7.3%
Hong Kong	14 014	24.8%	23 122	30.9%	19 375	26.2%	5 687	9.0%	3 713	6.1%	- 12.2%
Israel	14	0.0%	11	0.0%	12	0.0%	71	0.1%	3 005	4.9%	+++
Switzerland	2 846	5.0%	3 238	4.3%	2 584	3.5%	2 940	4.7%	2 486	4.1%	+ 13.7%
Lebanon	2 375	4.2%	2 416	3.2%	3 024	4.1%	3 815	6.0%	2 408	3.9%	- 26.0%
Algeria	275	0.5%	1 355	1.8%	1 951	2.6%	2 531	4.0%	1 814	3.0%	- 12.9%
Ghana	2 271	4.0%	3 138	4.2%	1 810	2.5%	3 273	5.2%	1 766	2.9%	- 0.4%
Ivory Coast	565	1.0%	1 118	1.5%	1 350	1.8%	1 164	1.8%	1 114	1.8%	+ 60.5%
Uzbekistan	0	0.0%	0	0.0%	0	0.0%	160	0.3%	1 086	1.8%	+++
Vietnam	1 743	3.1%	25	0.0%	123	0.2%	352	0.6%	521	0.9%	+ 103.8%
Oman	401	0.7%	54	0.1%	143	0.2%	24	0.0%	482	0.8%	+++
U.A.Emirates	339	0.6%	316	0.4%	1 079	1.5%	571	0.9%	338	0.6%	- 16.1%
Bosnia-Herz.	209	0.4%	231	0.3%	294	0.4%	220	0.3%	330	0.5%	+ 167.3%
Other Destinations	12 058	21.3%	9 253	12.4%	9 125	12.4%	6 766	10.7%	4 542	7.4%	+ 2.3%
Extra-EU	56 532		74 779		73 827		63 148		61 113		
% change			+ 32%		- 1%		- 14%		+ 20.0%		

EU exports of sheep & goatmeat and live animals

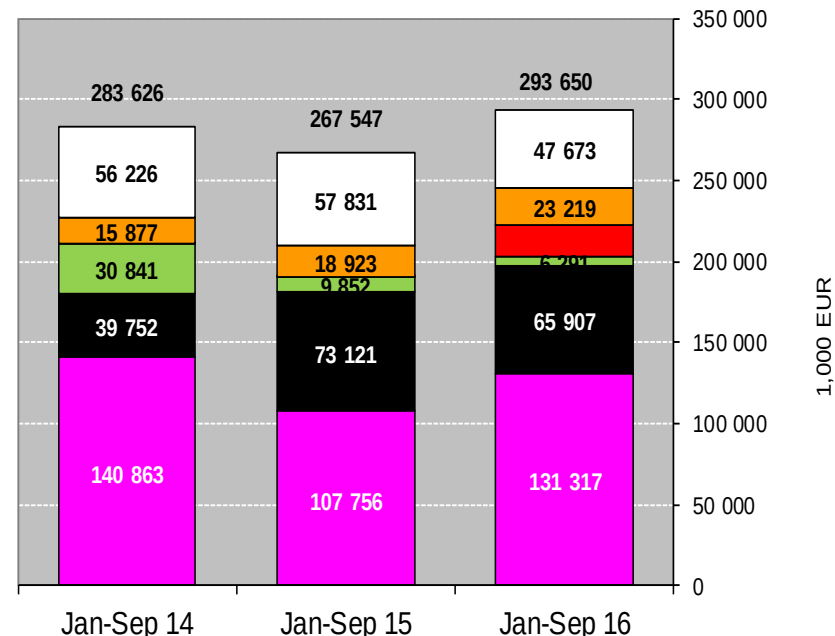
Trade figures (COMEXT)

EU EXPORTS of Sheep & Goat (Tonnes cwe)



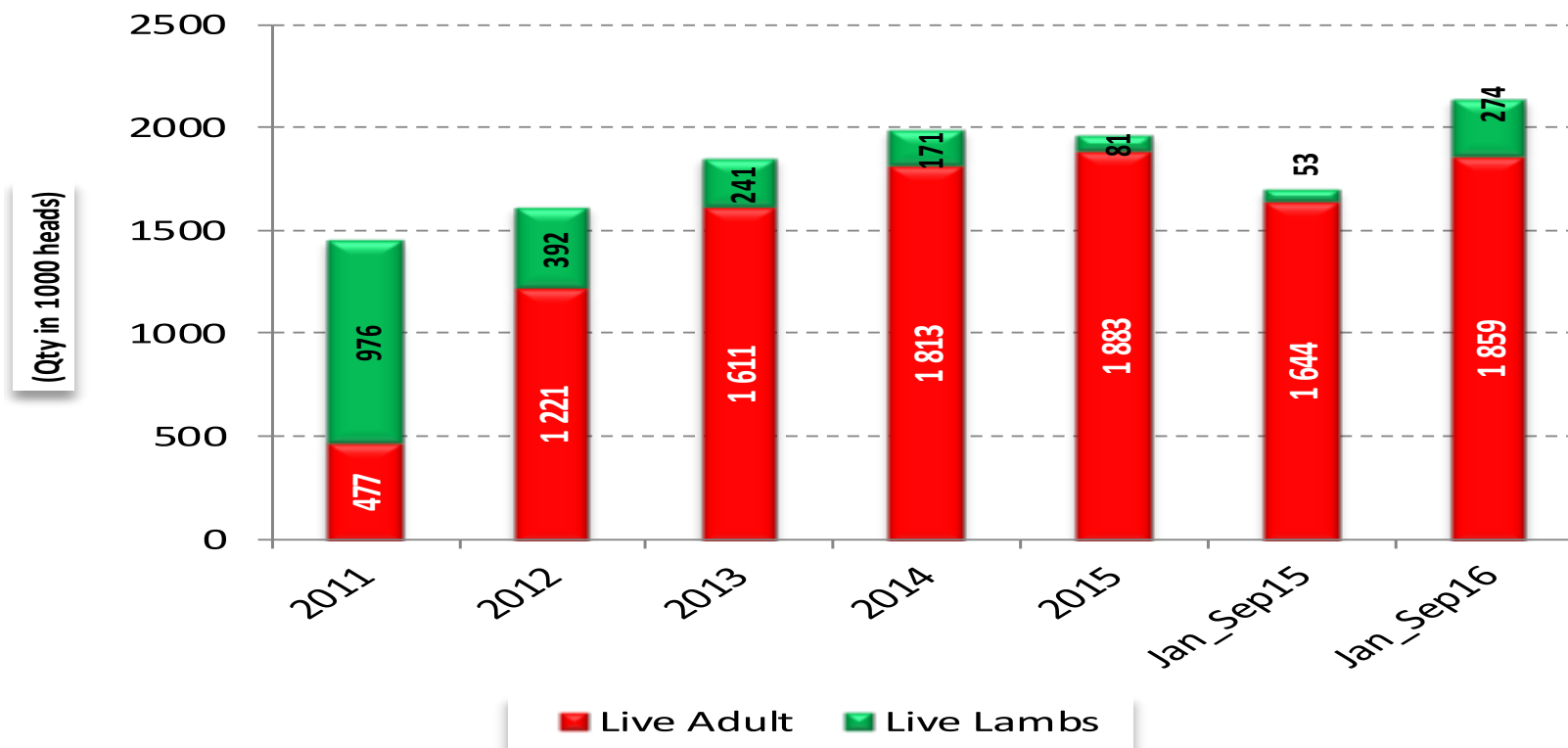
Libya Jordan Hong Kong Israel Switzerland Other destinations

EU EXPORTS of Sheep & Goat (1000 EUR)

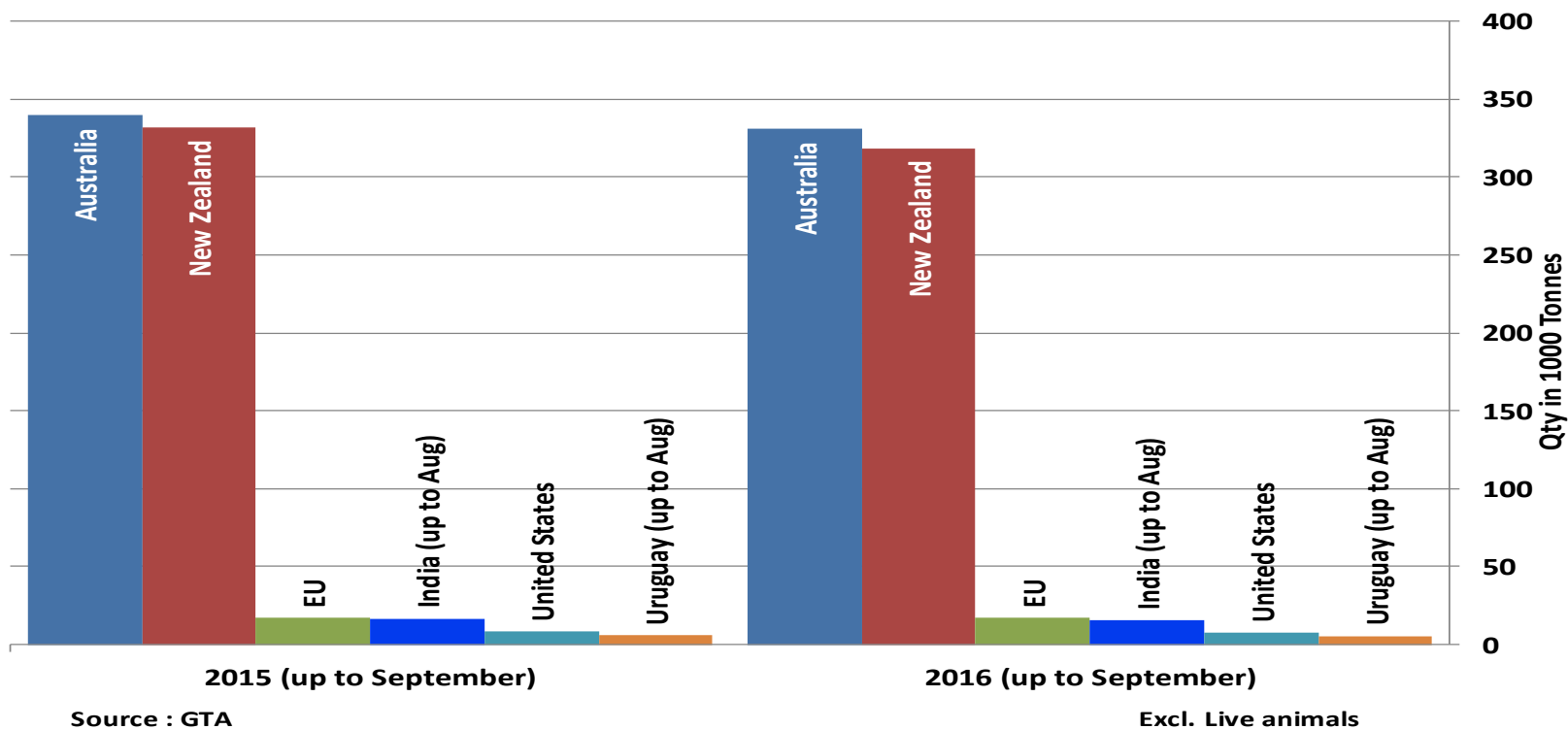


Libya Jordan Hong Kong Israel Switzerland Other destinations

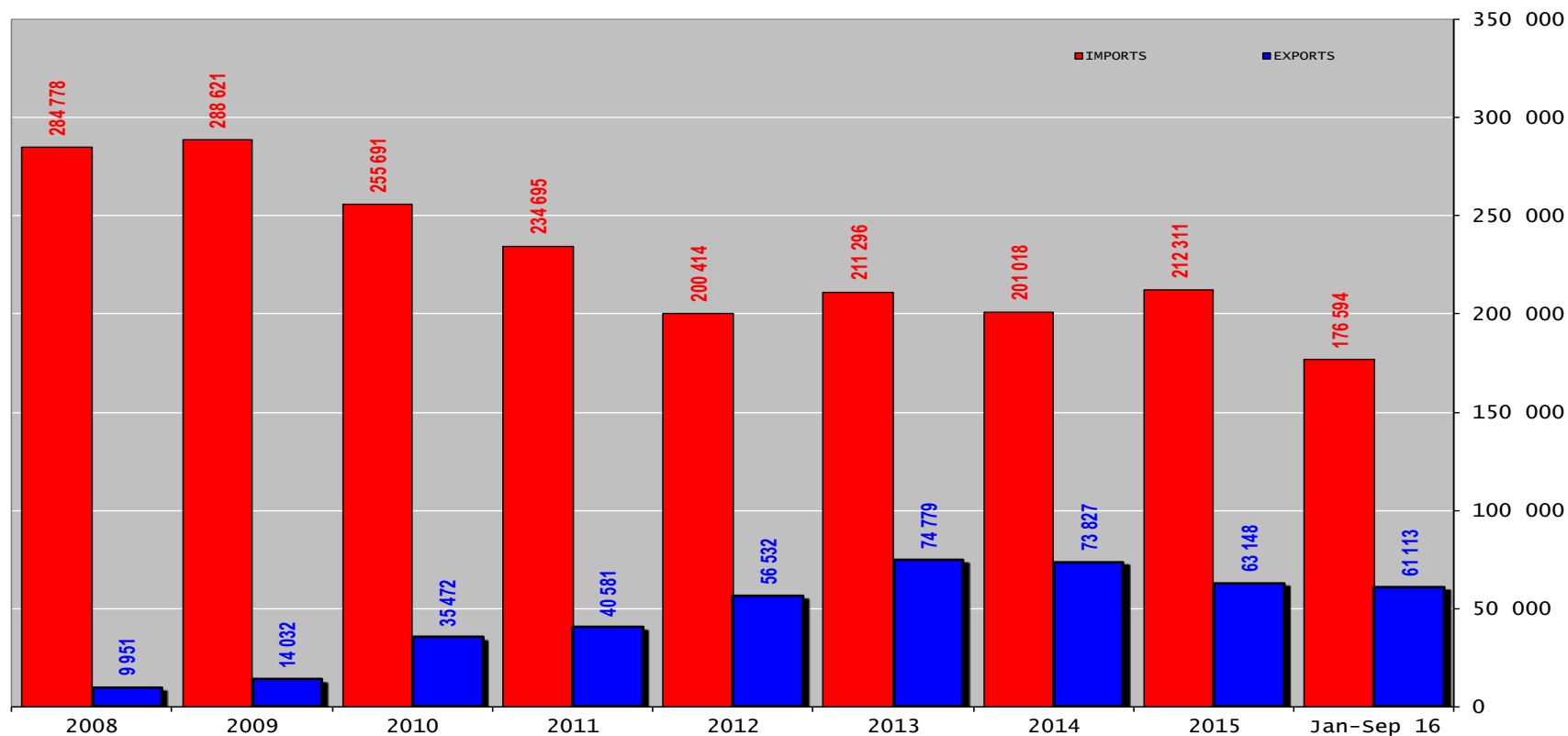
Evolution exports of live sheep (Excluding pure-bred breeding)



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



■ EU Sheep and Goat Meat Trade Balance, tonnes cwe





Outlook

Estimates of OCTOBER 2016

FORECAST QUESTIONNAIRE - SHEEP LIVESTOCK BALANCE (Thousand Heads)

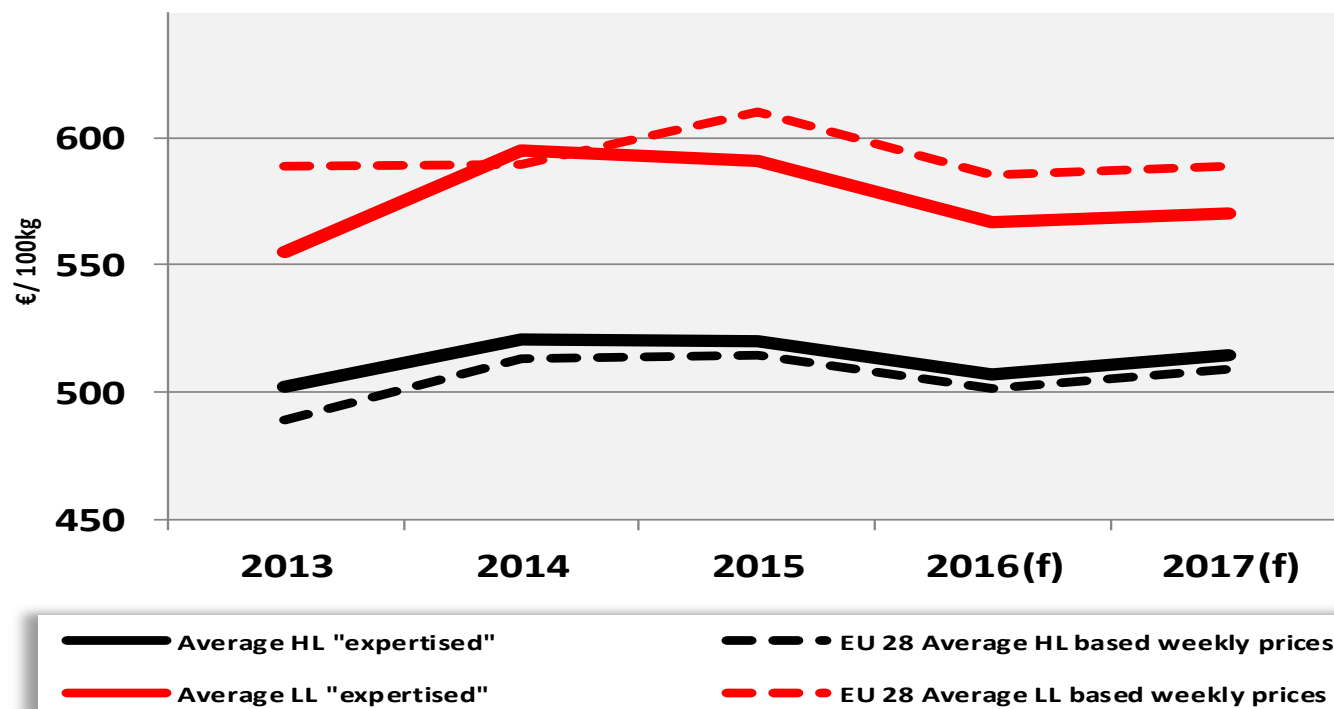
		Change							
		2013	2014	2015	2016(f)	2017(f)	15/14 %	16/15 %	17/16 %
Sheep numbers in December									
AT		357.4	349.0	353.0	355.0	358.0	+ 1.1%	+ 0.6%	+ 0.8%
BE		118.0	117.0	129.0	105.0	105.0	+ 10.3%	- 18.6%	+ 0.0%
BG		1 370.0	1 334.0	1 225.0	1 225.3	1 300.0	- 8.2%	+ 0.0%	+ 6.1%
DE		1 570.0	1 601.0	1 580.0	1 600.0	1 620.0	- 1.3%	+ 1.3%	+ 1.3%
IE		5 007.0	5 097.0	5 139.0	5 176.0	5 200.0	+ 0.8%	+ 0.7%	+ 0.5%
EL		9 520.0	8 948.0	8 948.0	9 216.0	8 950.0	+ 0.0%	+ 3.0%	- 2.9%
ES		16 609.0	16 572.0	16 361.0	16 882.0	16 500.0	- 1.3%	+ 3.2%	- 2.3%
FR		7 193.0	7 168.0	7 057.0	6 916.0	6 812.0	- 1.5%	- 2.0%	- 1.5%
HR		620.0	531.2	535.0	547.7	570.6	+ 0.7%	+ 2.4%	+ 4.2%
HU		1 214.0	1 185.0	1 190.0	1 235.0	1 235.0	+ 0.4%	+ 3.8%	+ 0.0%
IT		7 181.8	7 166.0	7 148.5	7 204.4	7 132.3	- 0.2%	+ 0.8%	- 1.0%
LV		84.8	92.6	105.7	118.0	125.0	+ 14.1%	+ 11.6%	+ 5.9%
NL		1 074.0	1 070.0	1 000.0	1 000.0	1 000.0	- 6.5%	+ 0.0%	+ 0.0%
PL		200.0	190.0	180.0	180.0	200.0	- 5.3%	+ 0.0%	+ 11.1%
PT		2 074.0	2 033.0	2 043.0	2 023.0	2 023.0	+ 0.5%	- 1.0%	+ 0.0%
RO		9 136.0	9 518.0	9 810.0	13 421.0	13 421.0	+ 3.1%	+ 36.8%	+ 0.0%
SE		576.8	588.8	594.7	586.4	594.0	+ 1.0%	- 1.4%	+ 1.3%
SK		389.4	377.4	372.5	376.0	378.0	- 1.3%	+ 0.9%	+ 0.5%
UK		22 027.0	22 687.0	23 103.0	23 300.0	23 300.0	+ 1.8%	+ 0.9%	+ 0.0%
EU heads	Total	86 322.2	86 625.0	86 874.4	91 466.8	90 823.9			
	Change	- 2.3%	+ 0.4%	+ 0.3%	+ 5.3%	- 0.7%	+ 0.3%	+ 5.3%	- 0.7%
Red figures - No communication received - Estimated data									

Estimates of OCTOBER 2016

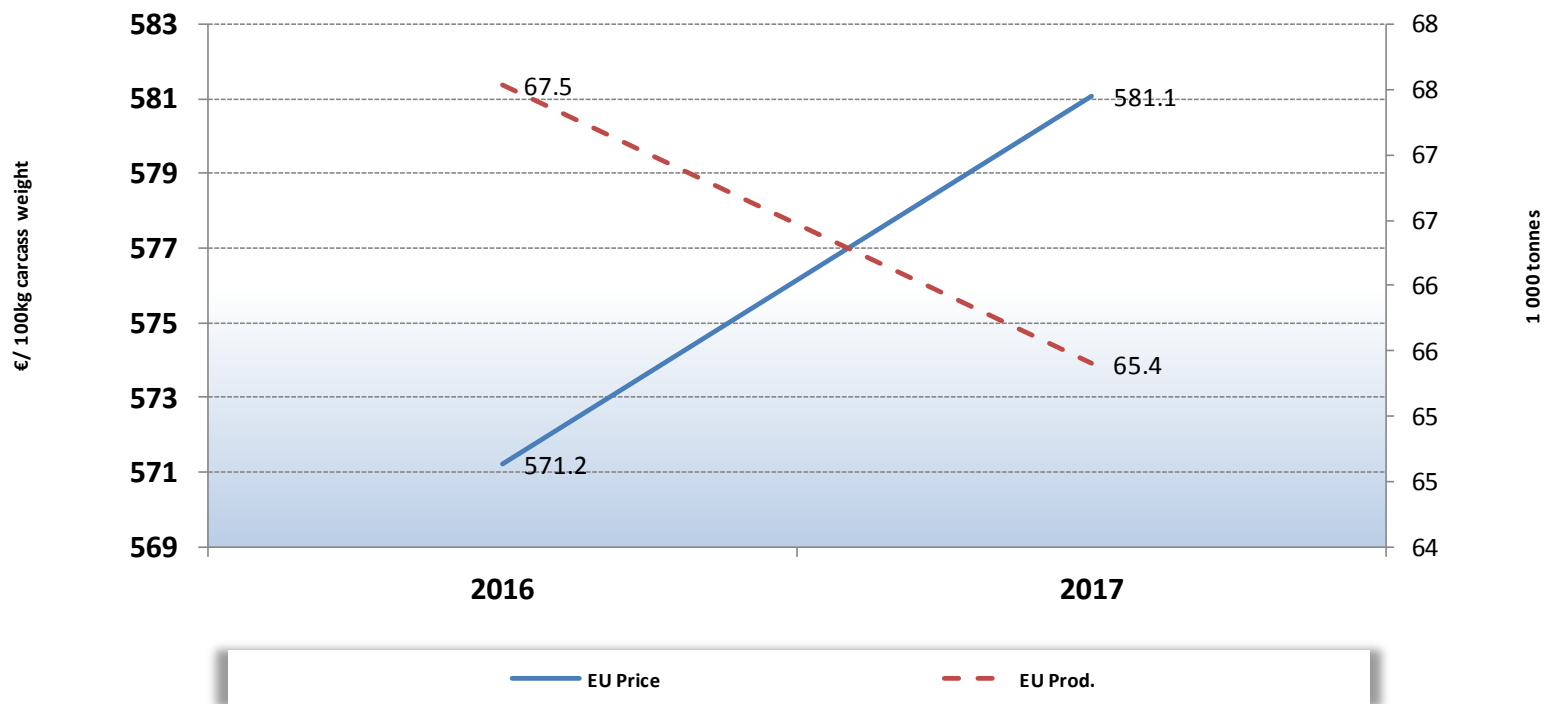
FORECAST QUESTIONNAIRE - SHEEP AND GOAT MEAT (Thousand Tonnes)

							Change		
	2013	2014	2015	2016(f)	2017(f)	15/14 %	16/15 %	17/16 %	
GIP/ PIB/ BEE									
AT	7.7	8.0	8.0	8.0	8.0	+ 0.0%	+ 0.0%	+ 0.0%	
BE	0.6	0.7	1.0	0.7	0.7	+ 42.9%	- 30.0%	+ 0.0%	
BG	10.0	9.0	9.0	9.0	9.5	+ 0.0%	+ 0.0%	+ 5.6%	
DE	36.0	32.0	32.0	33.5	33.7	+ 0.0%	+ 4.7%	+ 0.6%	
IE	57.0	58.0	58.0	60.0	61.0	+ 0.0%	+ 3.4%	+ 1.7%	
EL	98.0	80.0	72.0	80.0	80.0	- 10.0%	+ 11.1%	+ 0.0%	
ES	127.2	112.0	110.0	120.0	110.0	- 1.8%	+ 9.1%	- 8.3%	
FR	86.0	87.0	87.0	88.0	87.0	+ 0.0%	+ 1.1%	- 1.1%	
HR	7.3	6.9	7.4	8.0	8.4	+ 7.3%	+ 8.8%	+ 4.2%	
HU	3.0	3.1	3.2	3.7	3.7	+ 2.9%	+ 16.0%	+ 0.0%	
IT	35.5	26.6	35.4	34.0	33.3	+ 33.1%	- 4.0%	- 2.1%	
LV	2.6	2.7	3.1	2.4	2.8	+ 11.7%	- 21.3%	+ 16.7%	
NL	16.4	16.7	16.3	16.3	16.3	- 2.4%	+ 0.0%	+ 0.0%	
PL	2.0	2.0	2.0	2.0	2.0	+ 0.0%	+ 0.0%	+ 0.0%	
PT	11.0	11.0	11.0	11.0	11.0	+ 0.0%	+ 0.0%	+ 0.0%	
RO	50.5	48.7	50.7	51.5	51.5	+ 4.1%	+ 1.6%	+ 0.0%	
SE	4.9	5.1	5.1	5.1	4.2	+ 0.6%	- 0.6%	- 17.5%	
SK	1.1	1.0	1.3	1.3	1.0	+ 24.7%	- 1.6%	- 19.7%	
UK	290.0	298.0	300.0	291.0	295.0	+ 0.7%	- 3.0%	+ 1.4%	
EU Tonnes	Total	846.8	808.6	812.5	825.5	819.1			
	EU tonnes	- 0.9%	- 4.5%	+ 0.5%	+ 1.6%	- 0.8%	+ 0.5%	+ 1.6%	- 0.8%
Red figures - No communication received - Estimated data									
Blue cells - Eurostat data									

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



Price & Production forecasts for Goat Meat (Based on expertise & estimated data)



Sheep & goat meat production balance (2017 forecasted by experts)

Missing : NL

