



Challenges for the pigmeat market derived from ASF

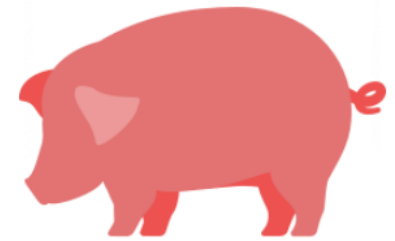
Kai-Uwe Sprenger
EU Commission, DG AGRI

Vilnius, 7 November 2018

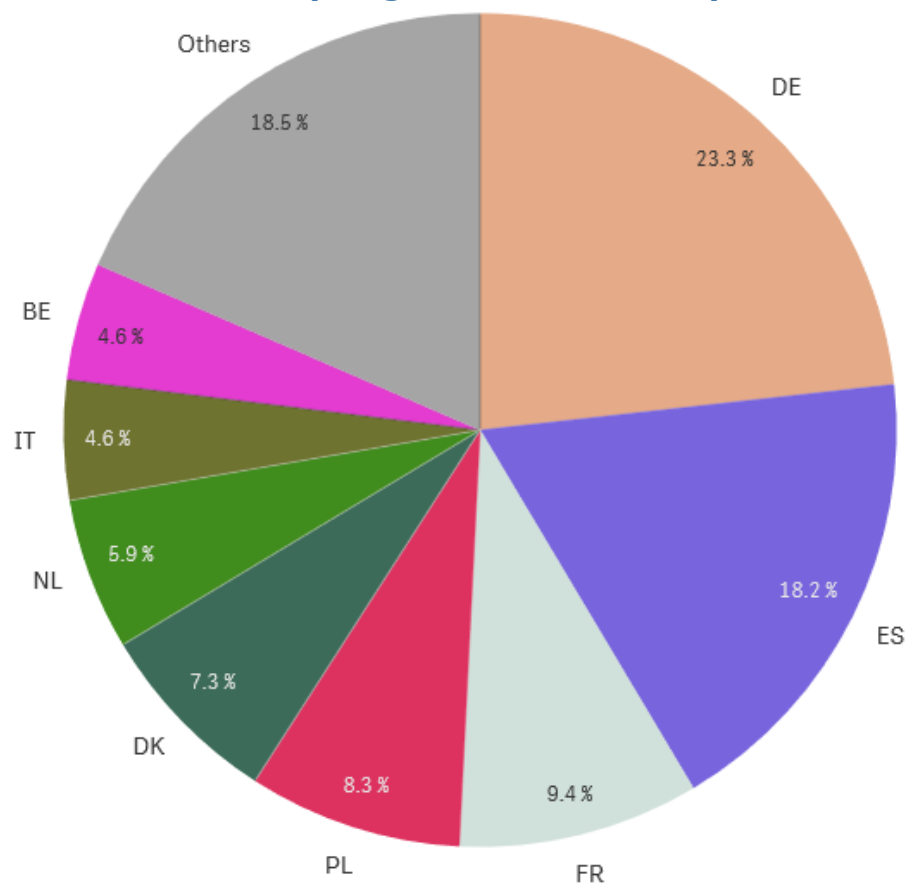
The EU pig market

- *255 mio pigs slaughtered in the EU*
- *24 mio t carcass weight*
- *50% of EU's total meat production*
- *Self-sufficiency 112%*

- *2,6 mio t carcass weight exported*



Who slaughters the pigs in the EU? (avg. 2013-2017)

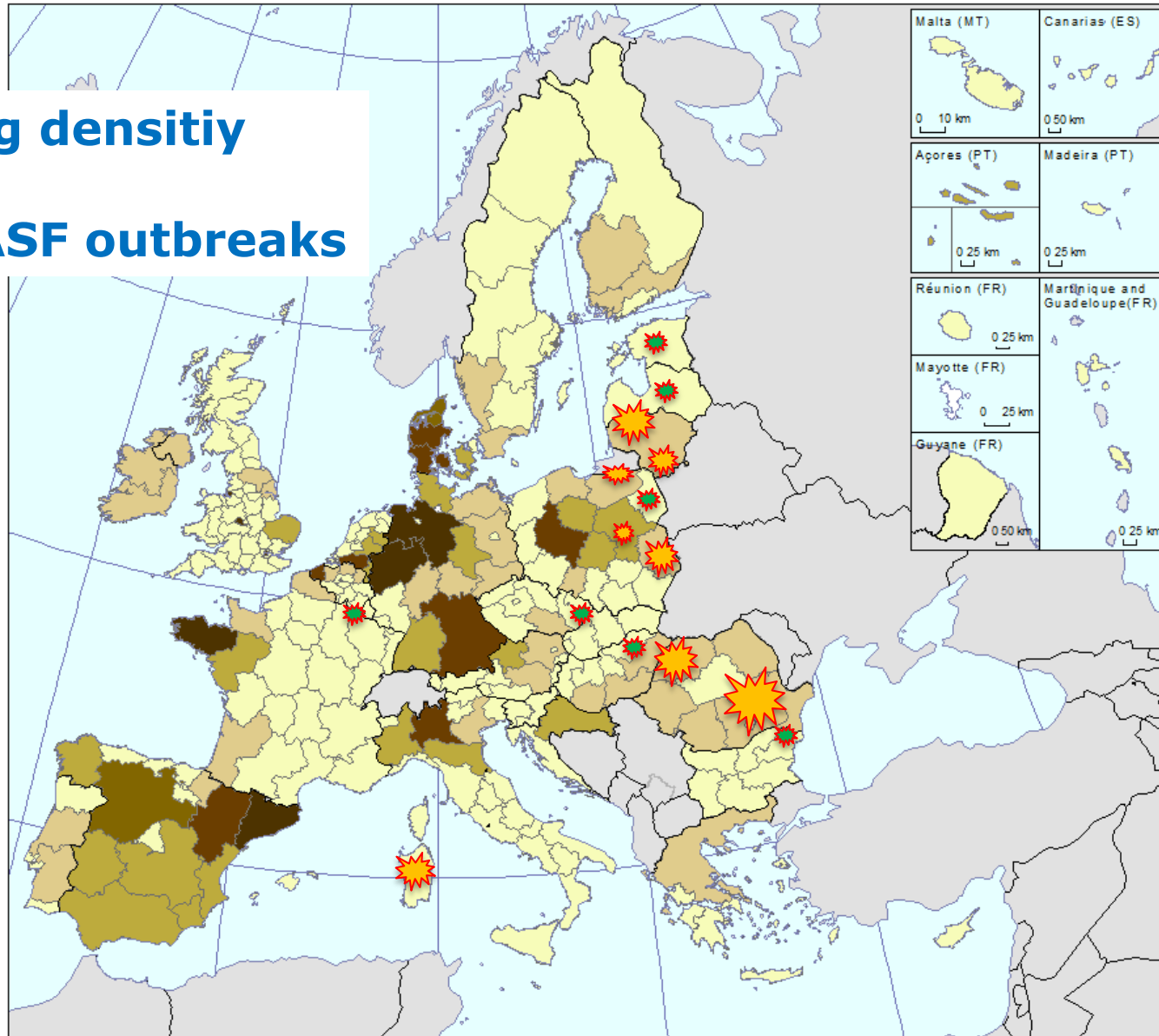


Development of EU pigmeat production and export share (excluding offal)



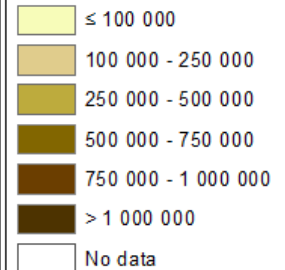


EU pig density and ASF outbreaks



Total number of pigs in livestock units in the Member States, 2013

Total number of pigs (piglets, breeding sows and others) in LSU



NUTS level:
NUTS-2_2013 (NUTS-1 for DE) and
NUTS-2_2010

Source:

Eurostat

Year:

2013

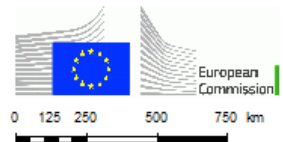
Calculations:

DG AGRI - G3

Cartography:

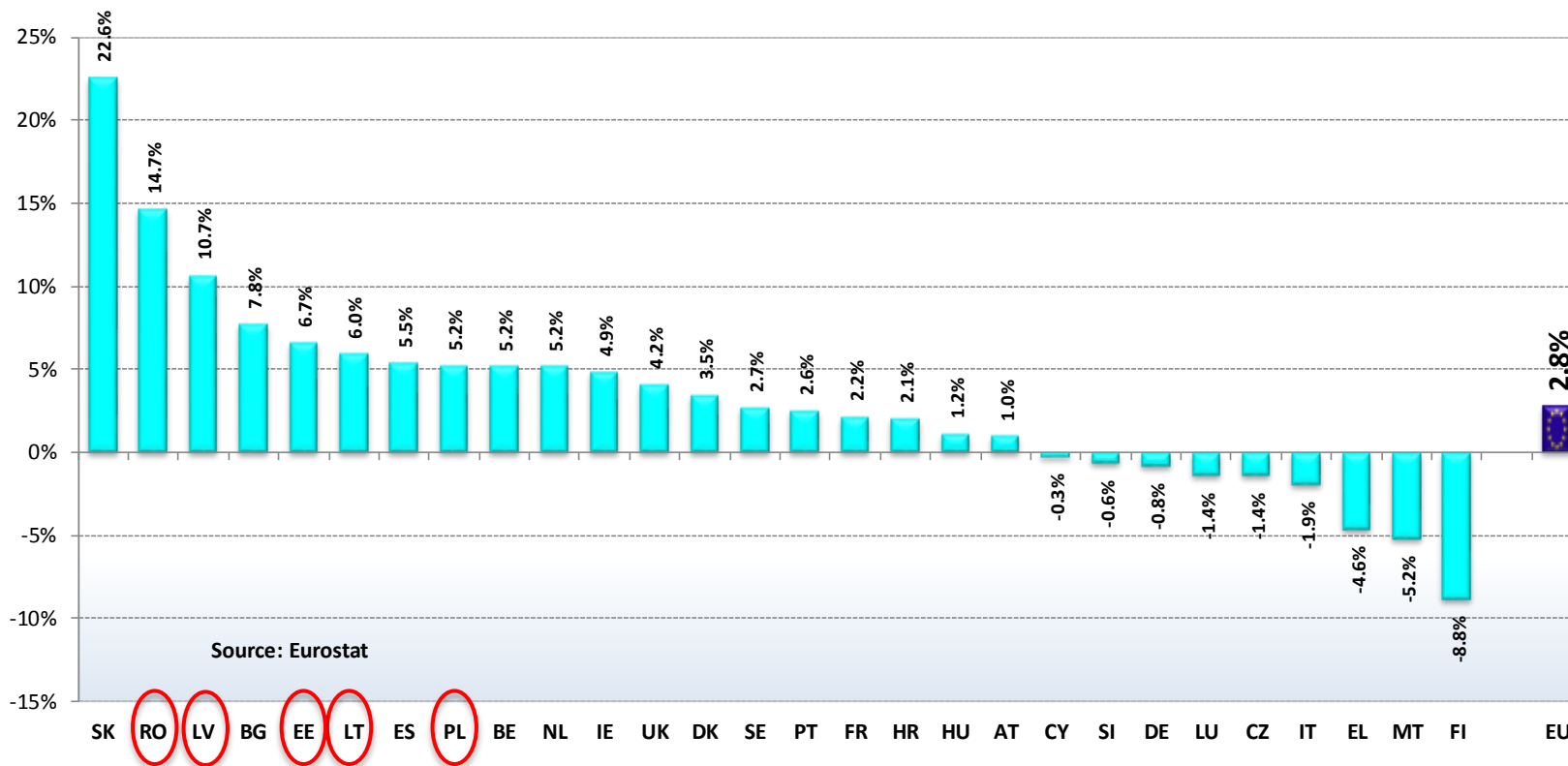
DG AGRI GIS TEAM 07/2018

© EuroGeographics for the administrative boundaries

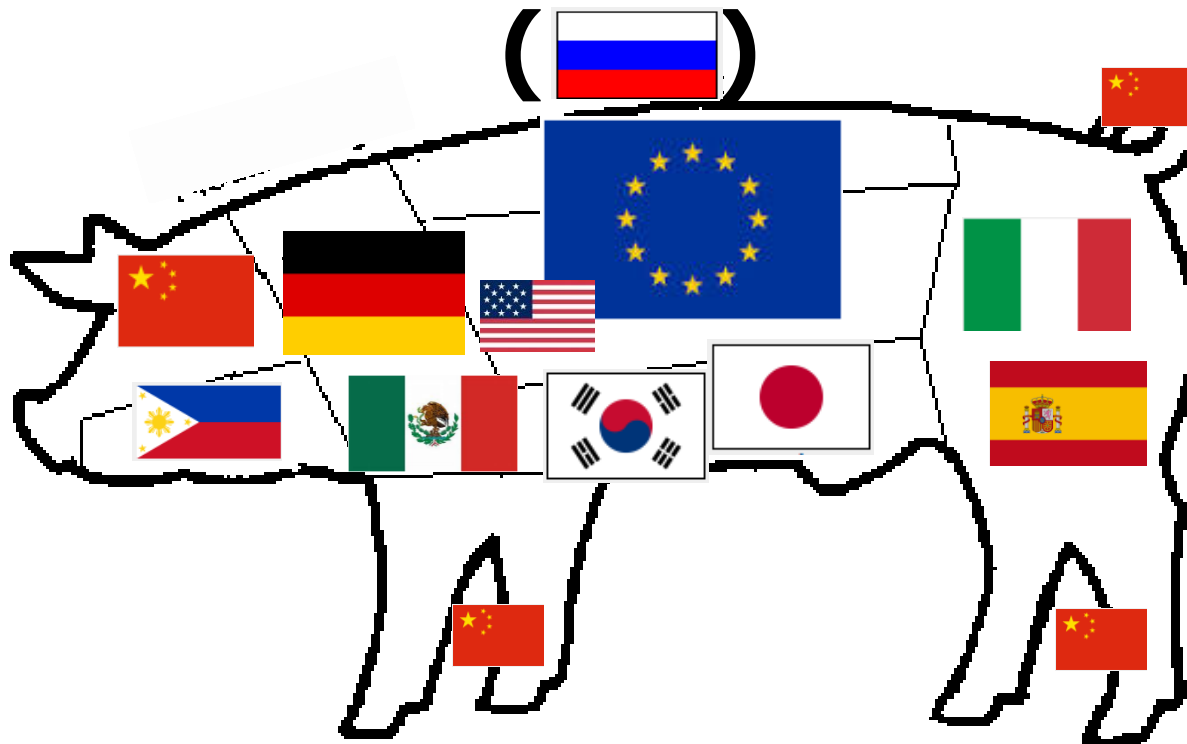




**Change in Pig Slaughter ('000 Heads)
2018/2017 (up to July)**

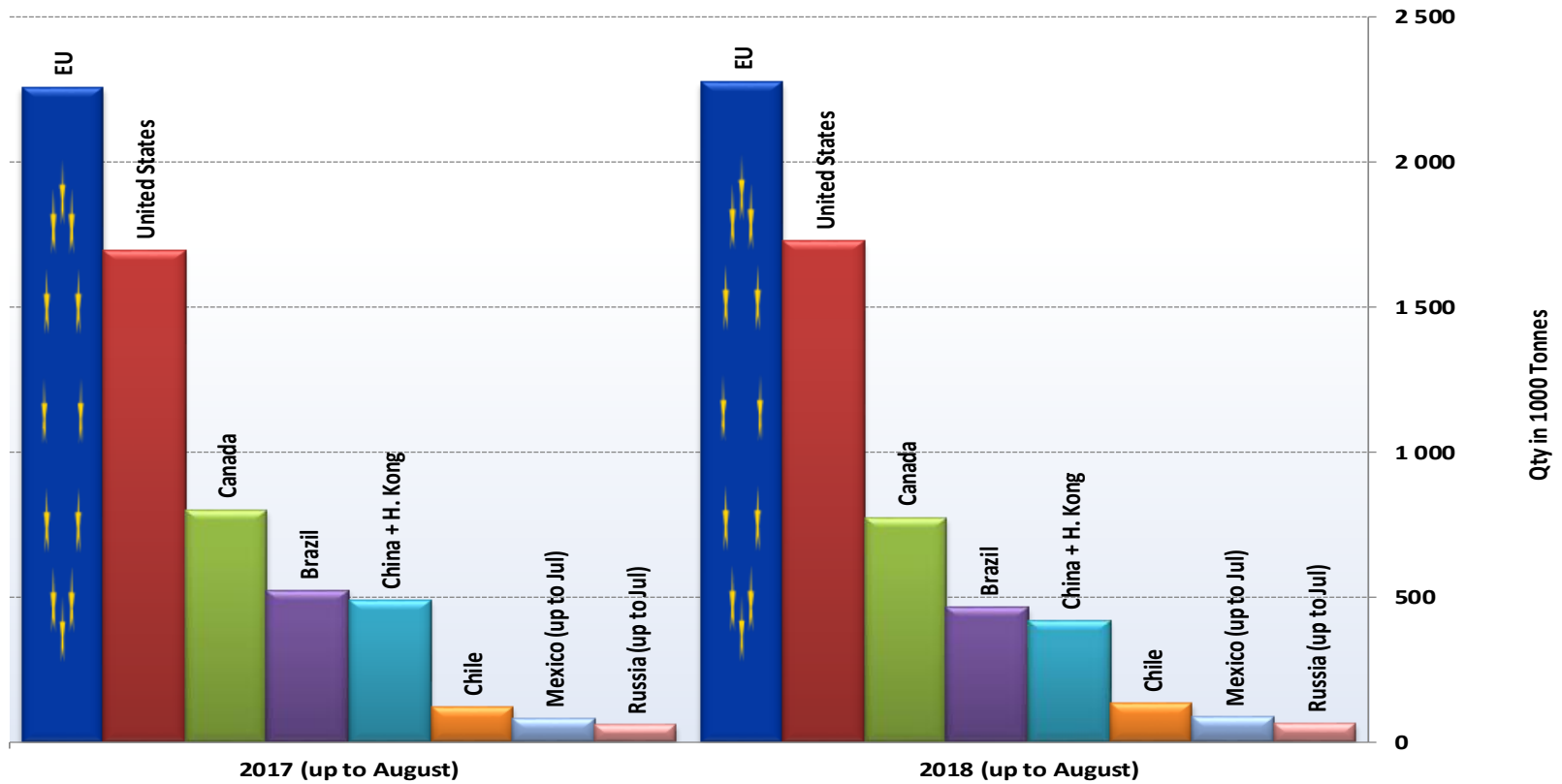


Valorisation of the pig carcass





Main Exporters of PIG Products (up to August)



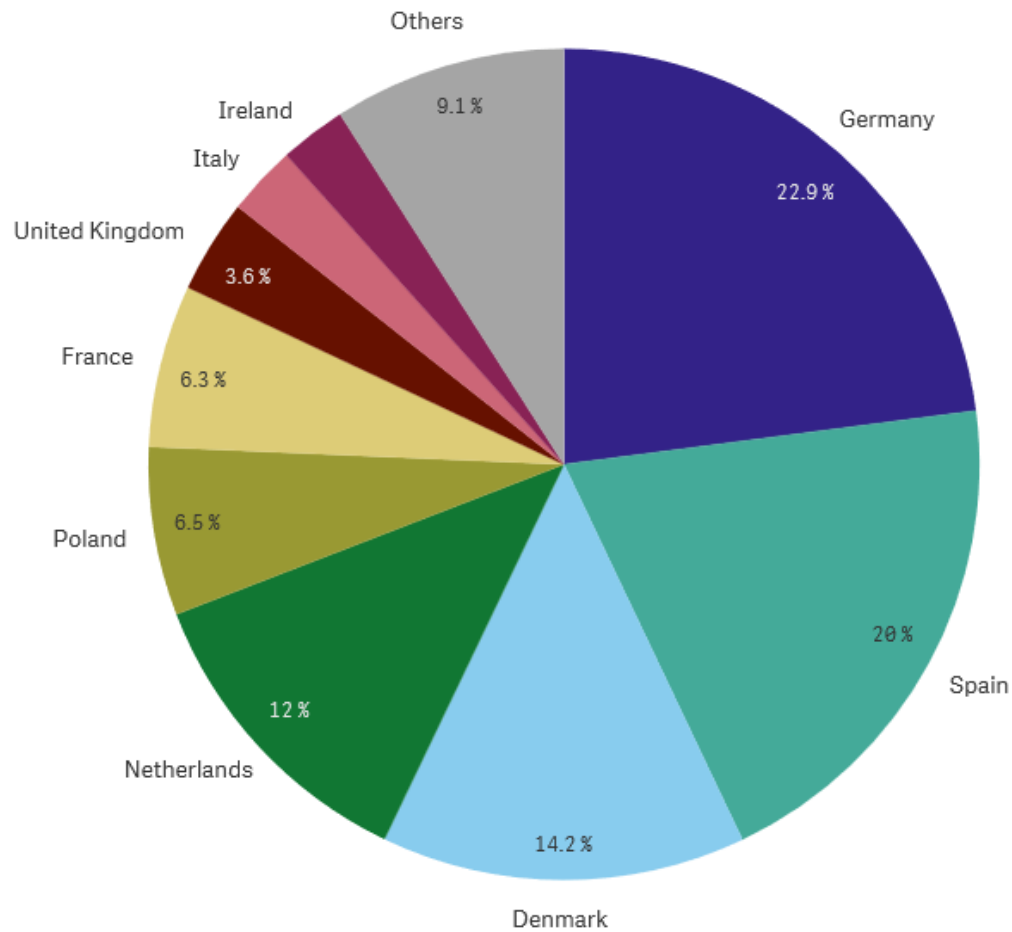
Source : GTA

Excl. Live animals



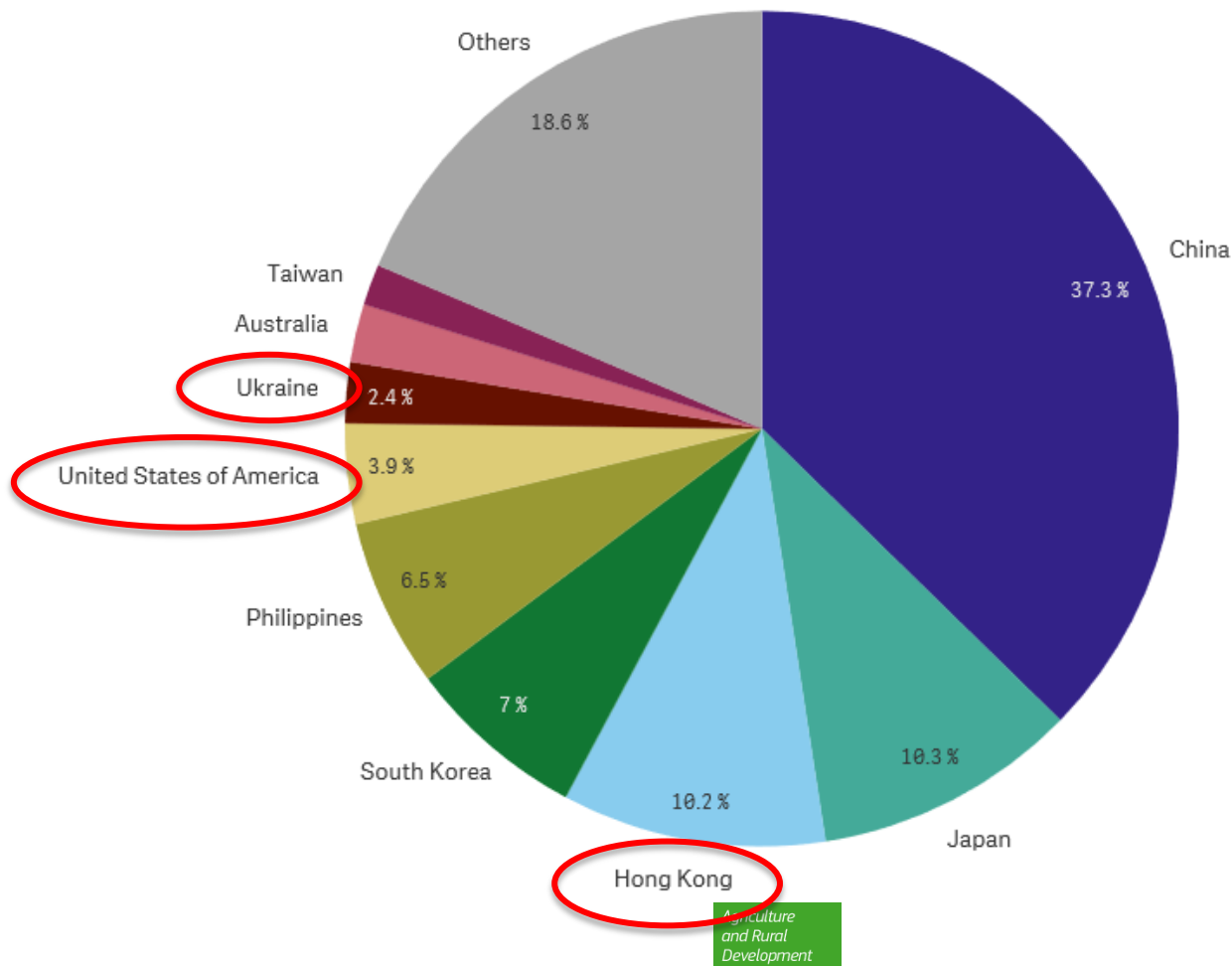
European
Commission

EU pigmeat exports by origin in 2017 (tonnes product weight)



EU pigmeat exports by destination in 2017

(tonnes product weight)

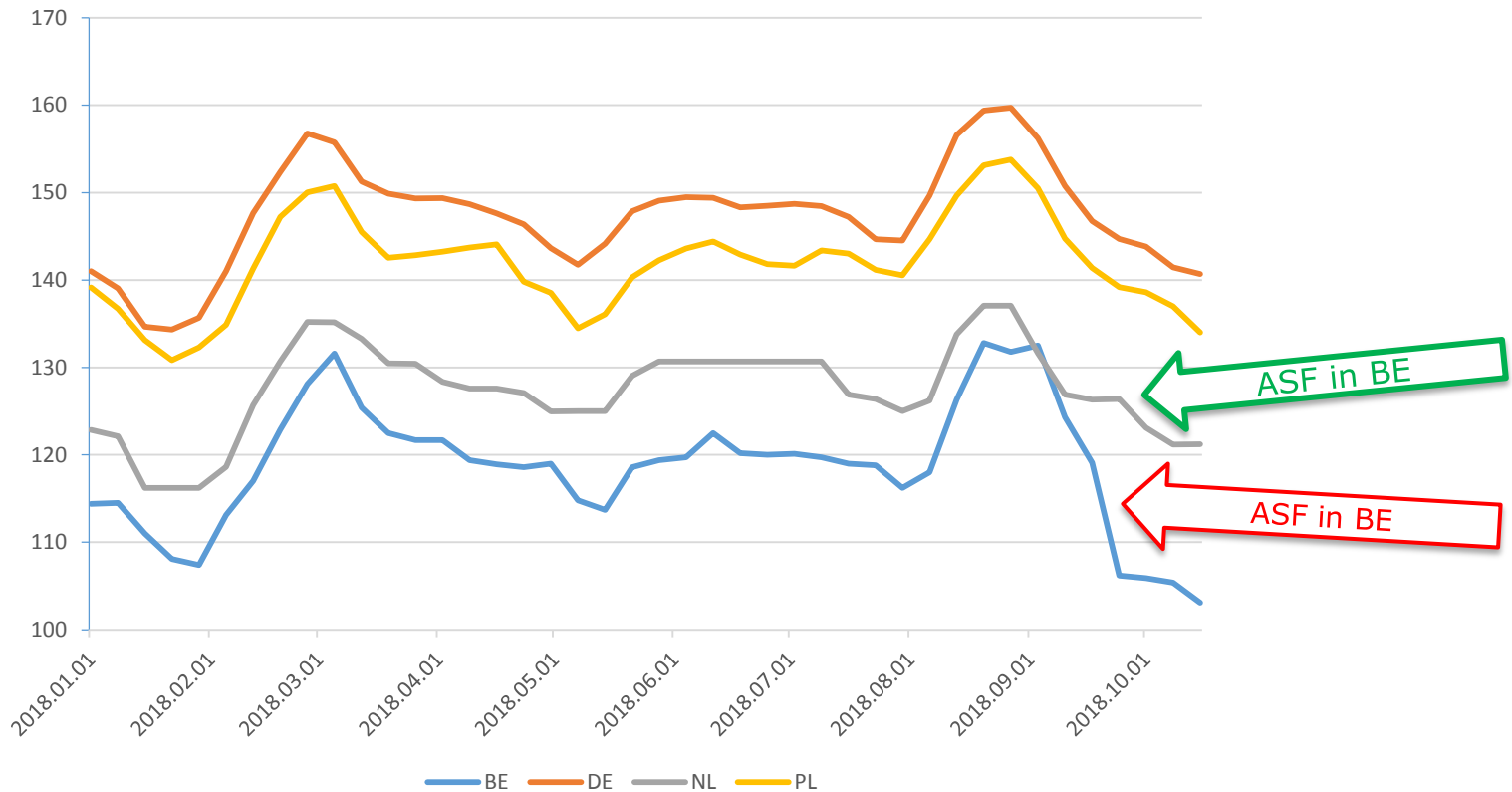


7 November 2018



pig prices in selected Member States in 2018

Class E prices in EUR / 100 kg carcass weight



EU support measures

- *Eradication programmes (DG SANTE)*
- *Emergence measures (DG SANTE)*
- *Research activities (FP 7, Horizon 2020)*
- *Rural Development (DG AGRI)*
- *Market support (DG AGRI)*
 - **aid for private storage**
 - **exceptional measures** (supporting vet. restrictions)
- *State aids (DG AGRI)*

Conclusion

- *Regionalisation keeps the internal pig market functioning*
- *exports increase valorisation but also vulnerability*
- *targeted EU support cannot compensate economic risks*



**Thanks for your
attention!**





market updates via the Meat Market Observatory

http://ec.europa.eu/agriculture/market-observatory/meat/index_en.htm > **Pigmeat**

and

www.agridata.ec.europa.eu



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

	2014		2015		2016		2017		Jan-Aug 18		Compared to Jan-Aug 17
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
China	717 035	23.6%	1 141 484	33.9%	1 866 299	44.9%	1 403 475	36.5%	890 574	34.7%	- 2%
Japan	347 721	11.5%	364 745	10.8%	405 335	9.7%	425 824	11.1%	306 335	11.9%	+ 3%
South Korea	227 846	7.5%	241 569	7.2%	260 670	6.3%	275 466	7.2%	219 172	8.5%	+ 17%
Philippines	202 698	6.7%	191 891	5.7%	216 539	5.2%	250 953	6.5%	193 203	7.5%	+ 11%
Hong Kong	408 779	13.5%	292 651	8.7%	363 251	8.7%	382 632	10.0%	153 962	6.0%	- 35%
USA	90 985	3.0%	105 123	3.1%	116 806	2.8%	155 527	4.0%	118 602	4.6%	+ 11%
Ukraine	106 794	3.5%	96 640	2.9%	75 696	1.8%	88 143	2.3%	67 357	2.6%	+ 37%
Australia	73 156	2.4%	102 645	3.0%	101 174	2.4%	95 290	2.5%	62 584	2.4%	- 7%
Vietnam	16 056	0.5%	38 290	1.1%	53 483	1.3%	41 603	1.1%	49 695	1.9%	+ 52%
Serbia	62 905	2.1%	47 488	1.4%	41 174	1.0%	55 030	1.4%	47 368	1.8%	+ 37%
Taiwan	52 970	1.7%	53 701	1.6%	47 865	1.2%	64 470	1.7%	39 452	1.5%	- 5%
Singapore	40 265	1.3%	40 962	1.2%	39 994	1.0%	37 711	1.0%	28 910	1.1%	+ 10%
Other	689 329	22.7%	653 077	19.4%	571 625	13.7%	567 005	14.8%	387 223	15.1%	
Extra-EU	3 036 539		3 370 266		4 159 911		3 843 130		2 564 438		
% change			+ 11%		+ 23%		- 8%		+ 1.0%		