



The EU pigmeat market

Current situation and future prospects

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European Commission, DG AGRI

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Agriculture
and Rural
Development



Euroopa Maaelu Arengu
Põllumajandusfond:
Euroopa investeeringud
maapiirkondadesse

Some key figures of EU pig production

- **Pig population:** 255 million pigs (2017)
- **Production:** 23.6 million tonnes carcass weight of pigmeat (2017)
- **Self sufficiency:** 112%.
- **Exports:** 2.6 million tonnes carcass weight (11% of EU pigmeat production), *processed products and offals excluded*.

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).
- The EU pig sector represented in 2016 **8.5% of the total output of the agricultural industry** in EU-28, the highest when compared to other meat sectors. The **pig sector** represents **35% of the total EU meat output of animal production**.



EU: an important player in the global pork market

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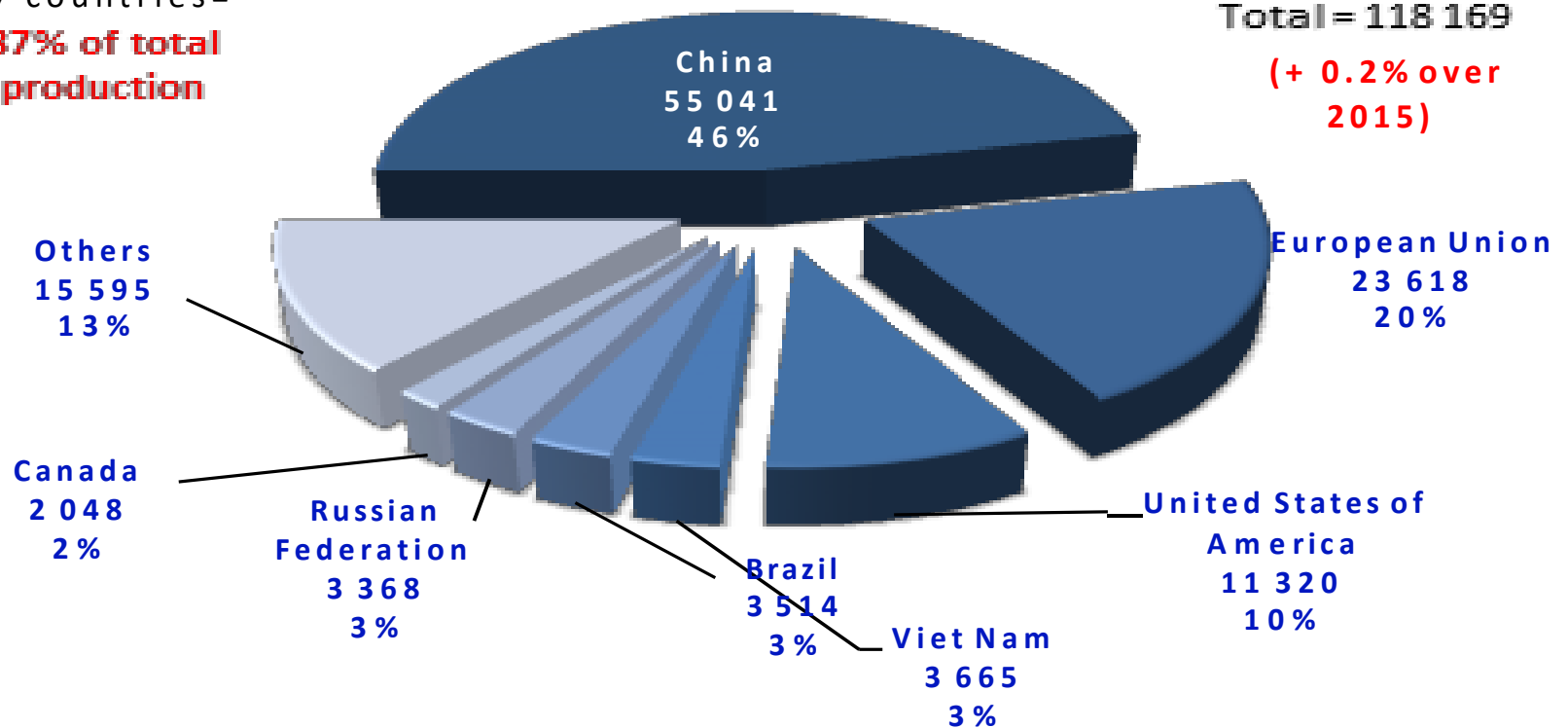
WORLD PIG PRODUCERS



Main Producers of Pigmeat (In 1000 tonnes product weight)

Year 2016
Total = 118 169
(+ 0.2% over
2015)

7 countries =
87% of total
production



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EUROPEAN UNION PIG MARKET



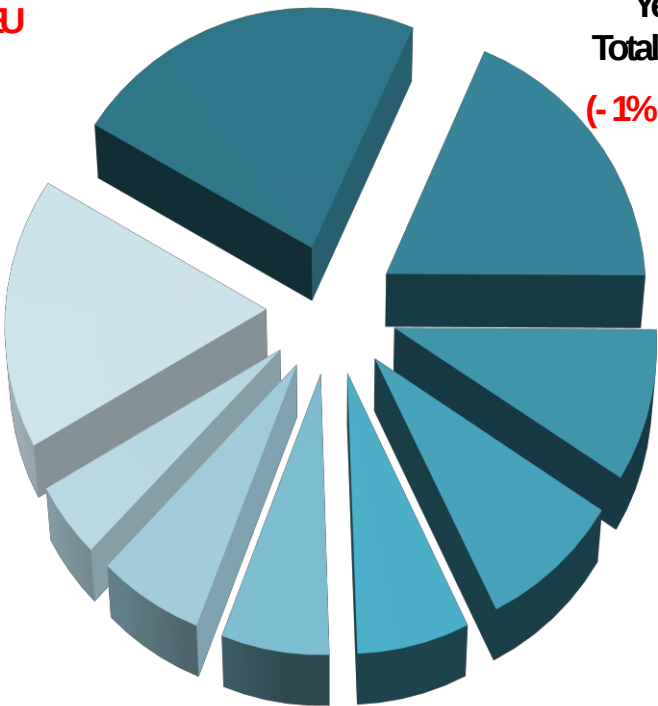
EU MEMBER STATES main producers

EU Main Producers

(1000 Tonnes productweight)

8MSs=

83% of total EU
production



Year 2017

Total EU= 23362

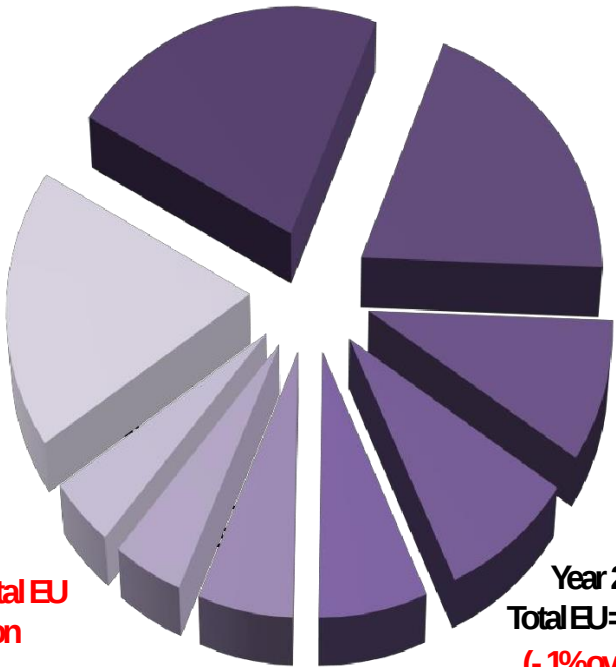
(- 1% over 2016)

EU Main Producers

(1000 Heads)

8MSs=

82% of total EU
production



Year 2017

Total EU= 255 215

(- 1% over 2016)

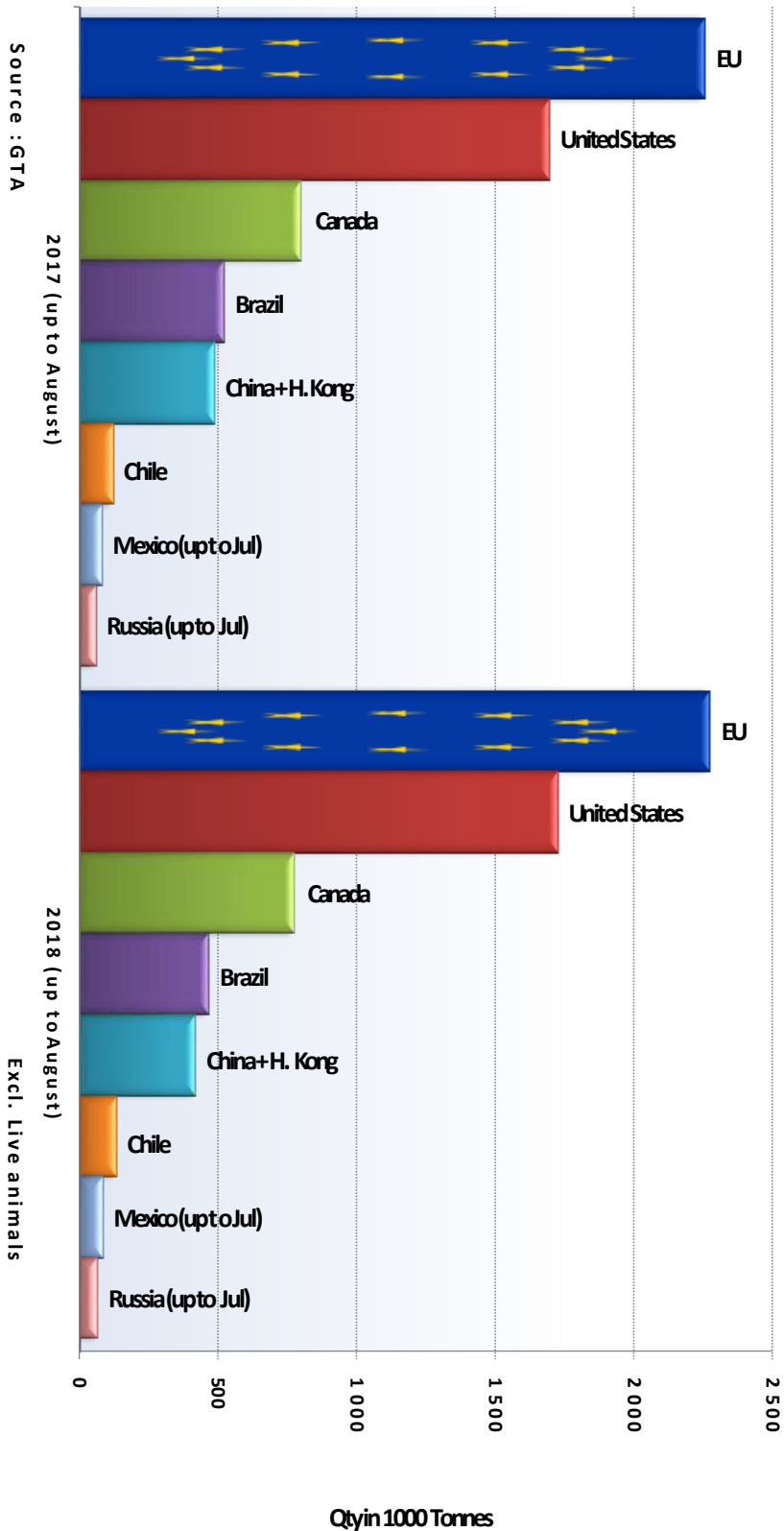
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WORLD PIG MARKET



PIG MAIN EXPORTERS

Main Exporters of PIG Products (up to August)

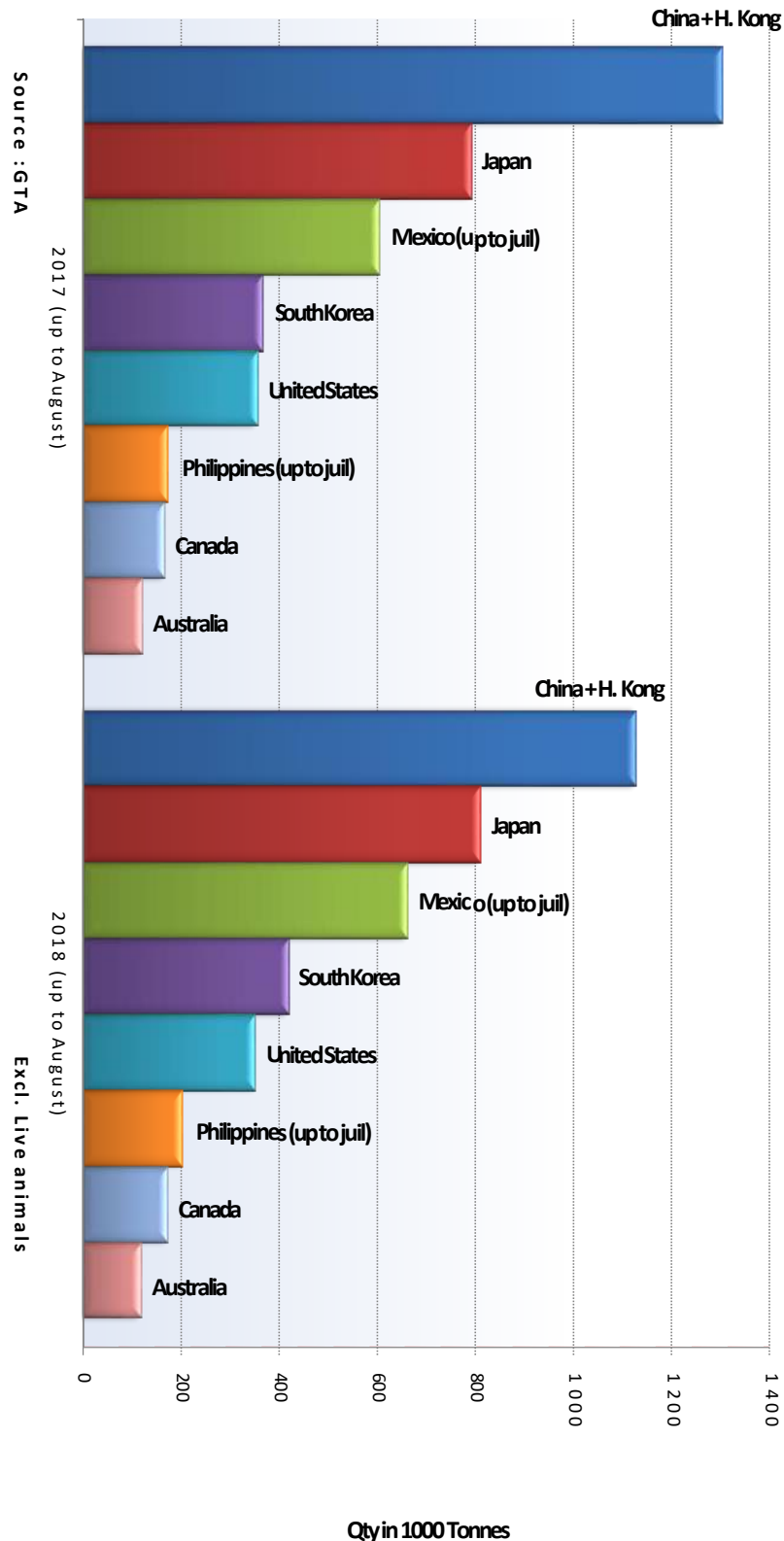


WORLD PIG MARKET

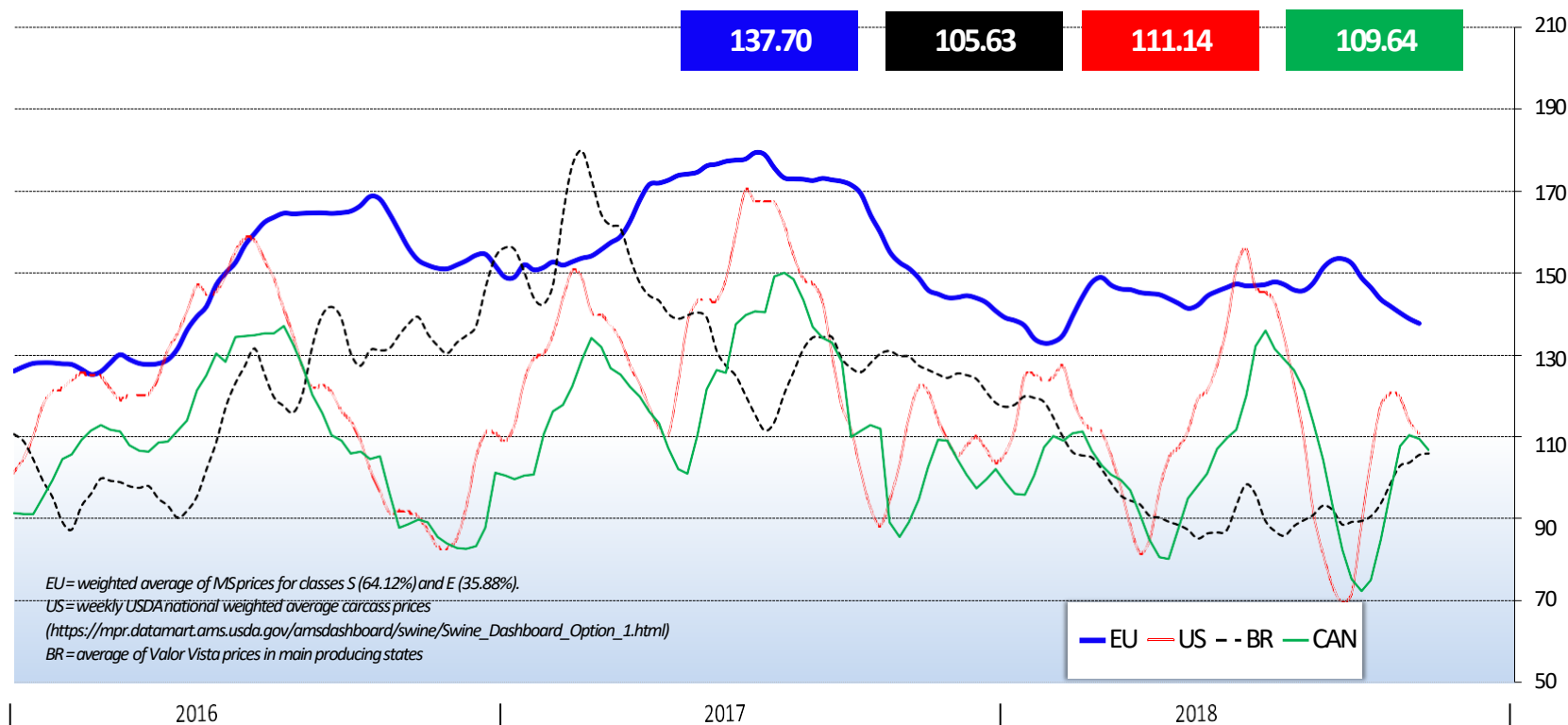


PIG MAIN IMPORTERS

Main Importers of PIG Products (up to August)



World weekly average Pig prices 2016 - 2018 in Euro/ 100kg carcase (EU, Brazil, Canada and USA)





Current EU pig market situation

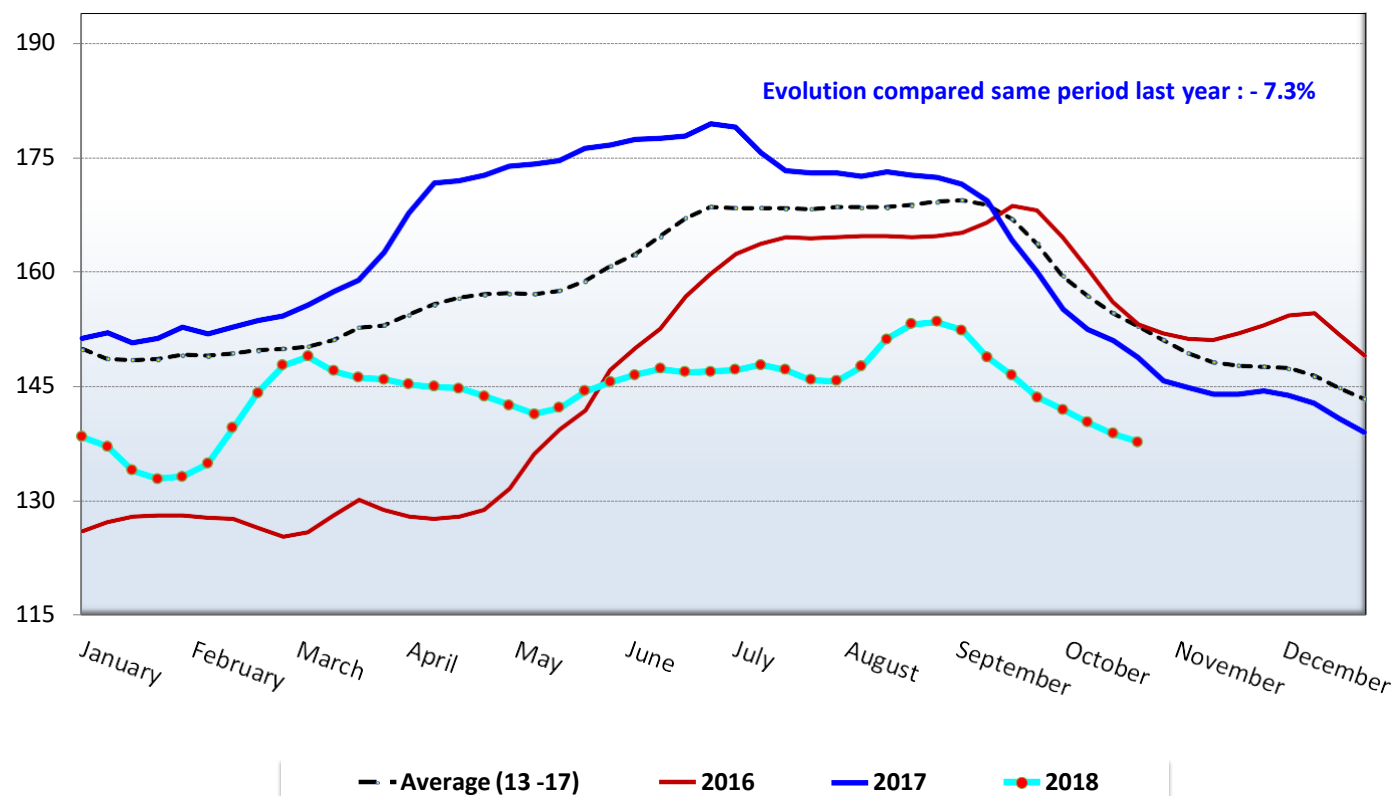
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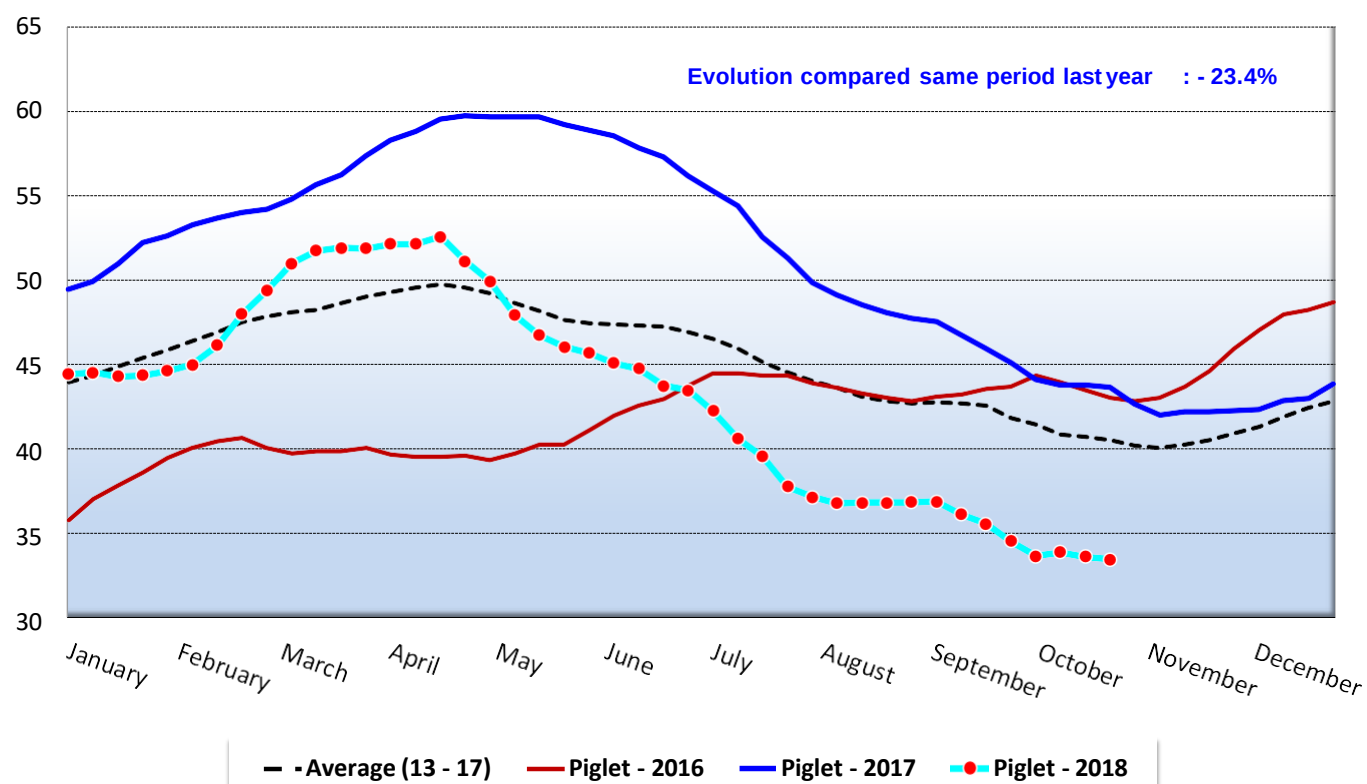
EU Prices	EU Prices	43		Evolutionsince last week	Evolutionsince last month	Evolutionsince last year
	Average (SE)	137.7	€/100 kg carcass weight	-08%	-41%	-73%
	Class S	1384		-08%	-43%	-67%
	Class E	1364		-07%	-38%	-82%
	Piglet	334	€/head	-04%	-31%	-234%

EU evolution of the EU pig **carcass prices** (average class E & S)
(€/ 100kg/cw)

Week 43 latest price ==> 137.70 EUR/100 kg/cw

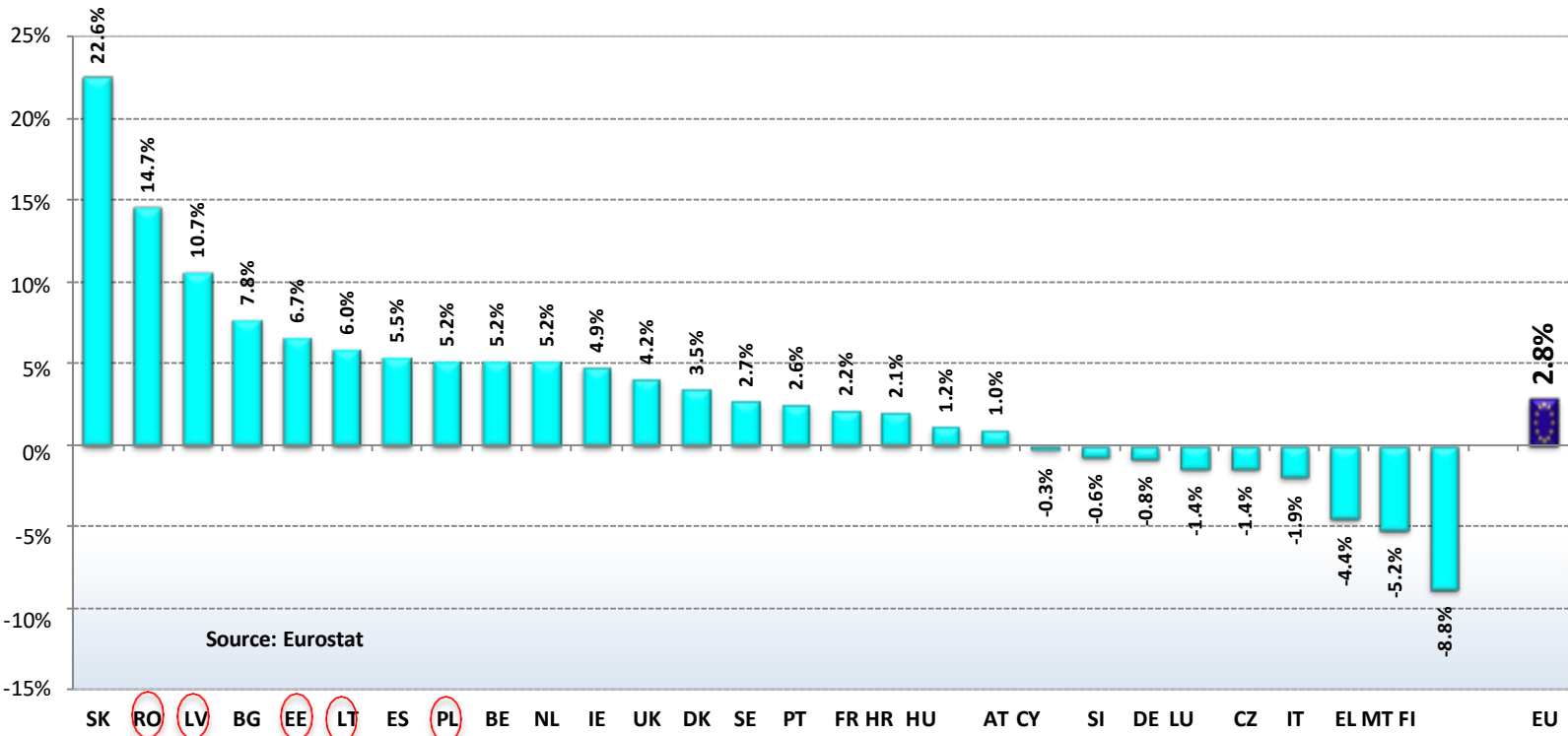


EU evolution of the EU average piglet prices
(€/head)
Week 43 latest price ==> 33.43 EUR/head



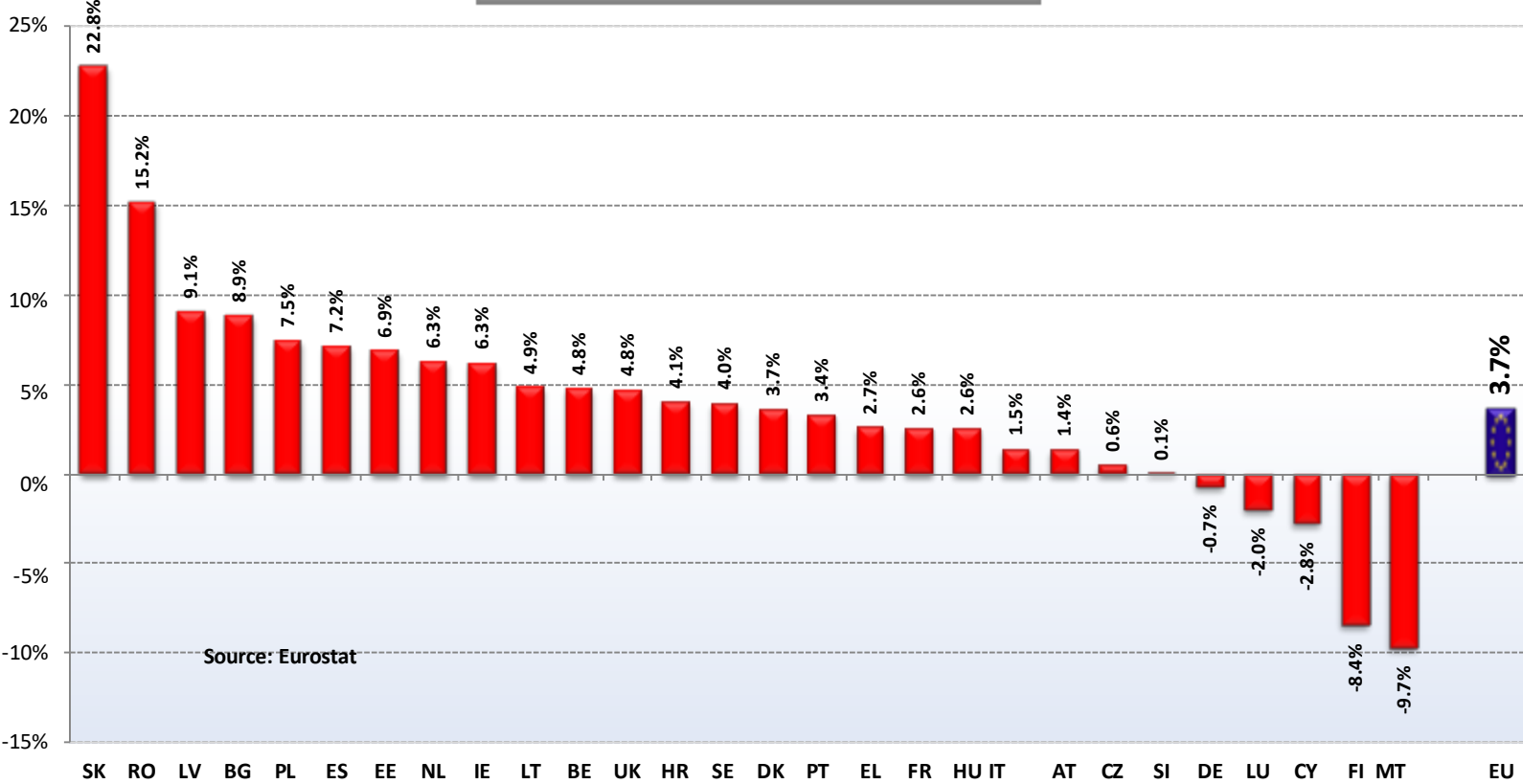


Change in Pig Slaughter ('000 Heads)
2018/2017 (up to July)





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



Source: Eurostat



The importance of the EU pig exports

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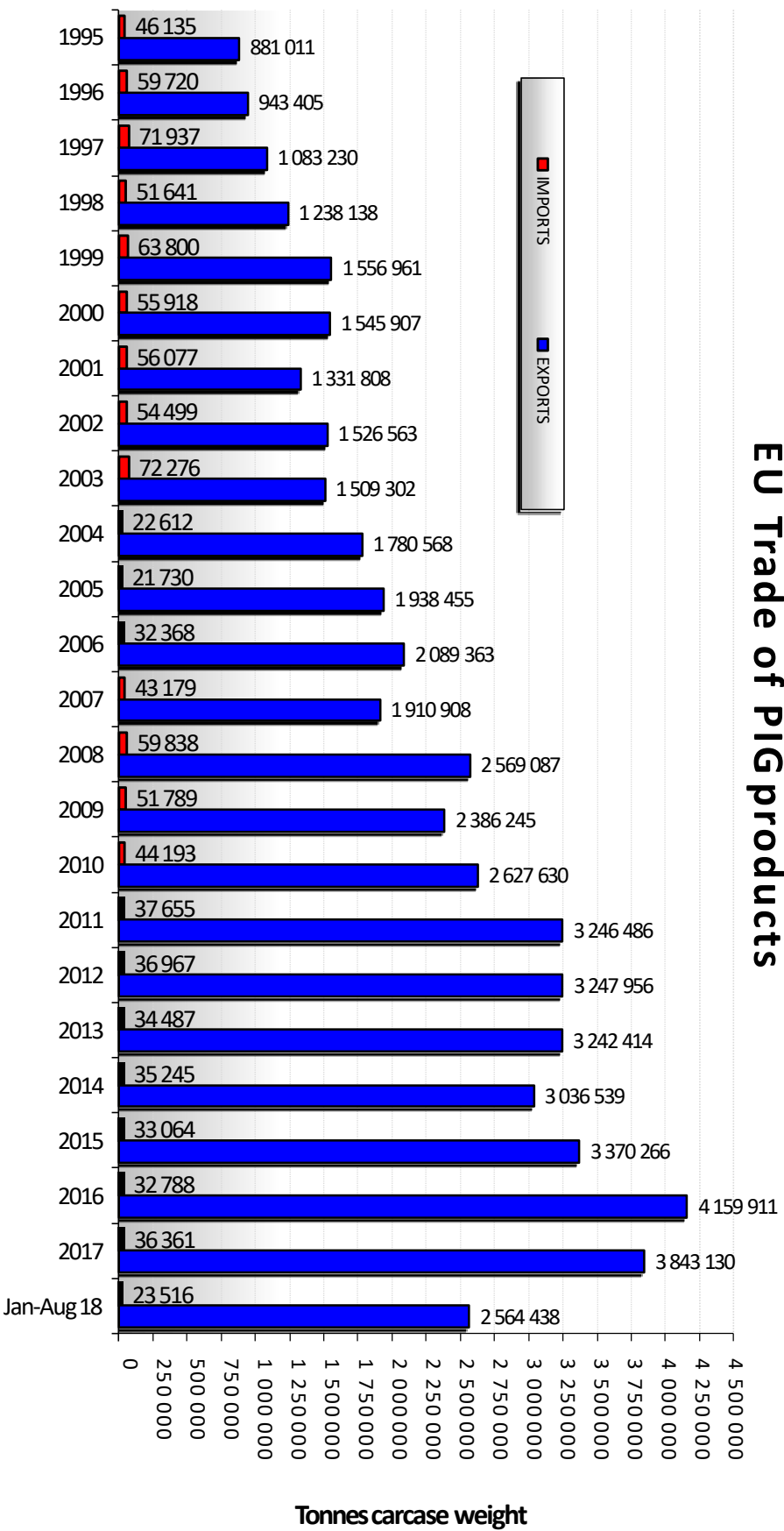
TRADE



EU TRADE BALANCE

EU trade of PIG products

EU Trade of PIG products





EU imports of selected PIG products

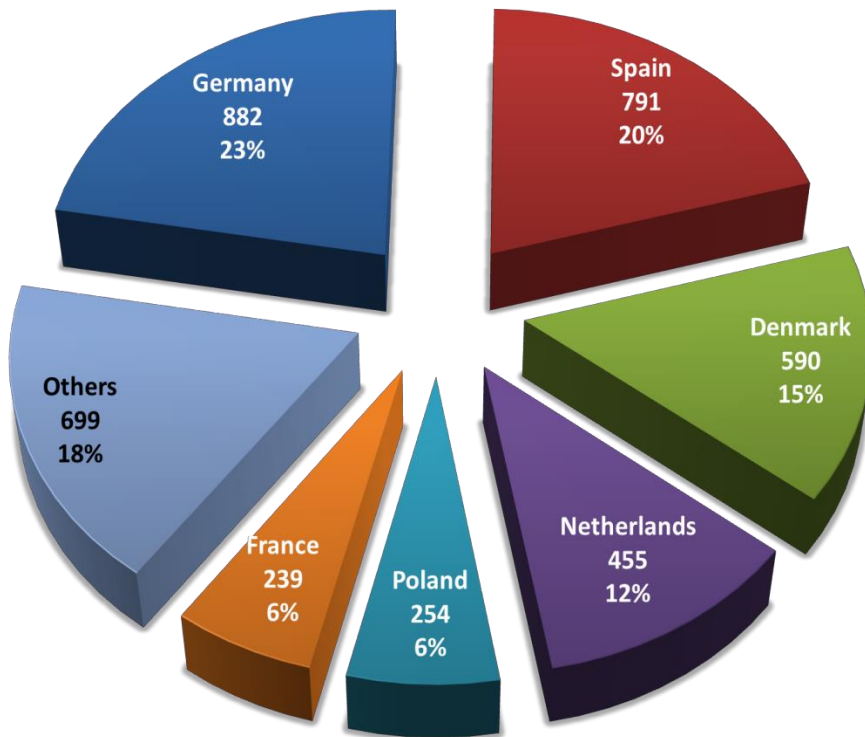
Trade figures (COMEXT – tonnes carcass weight)

IMPORT

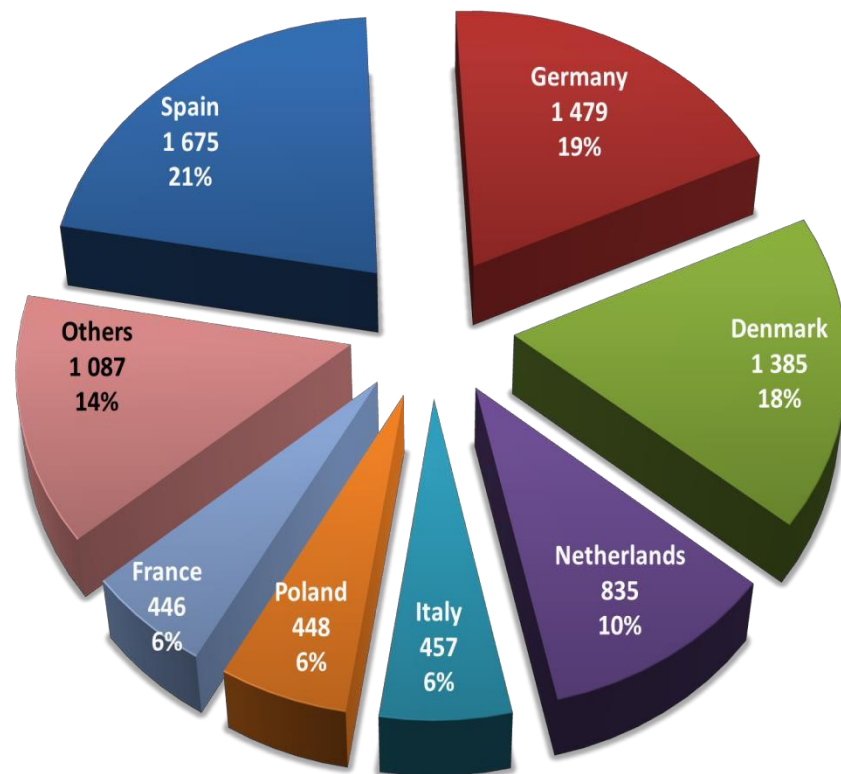
	2014		2015		2016		2017		Jan-Aug 18		Compared to Jan-Aug 17
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Switzerland	18 207	52%	20 225	61%	22 257	68%	22 922	63%	13 734	58%	-7%
Serbia	3 662	10%	1 819	6%	614	2%	2 694	7%	2 255	10%	28%
Chile	3 416	10%	2 896	9%	2 958	9%	2 434	7%	1 985	8%	20%
Norway	3 192	9%	2 315	7%	1 989	6%	2 296	6%	1 931	8%	17%
USA	1 498	4%	1 769	5%	1 711	5%	1 707	5%	1 113	5%	-4%
China	917	3%	378	1%	250	1%	1 315	4%	628	3%	56%
Other	4 353	12%	3 663	11%	3 010	9%	2 994	8%	1 870	8%	
Extra-EU	35 245		33 064		32 788		36 361		23 516		
%change			- 6%		- 1%		+ 11%		+ 0.4%		



**EU MS Main exporters
(1 000 tonnes - 2017 data)**

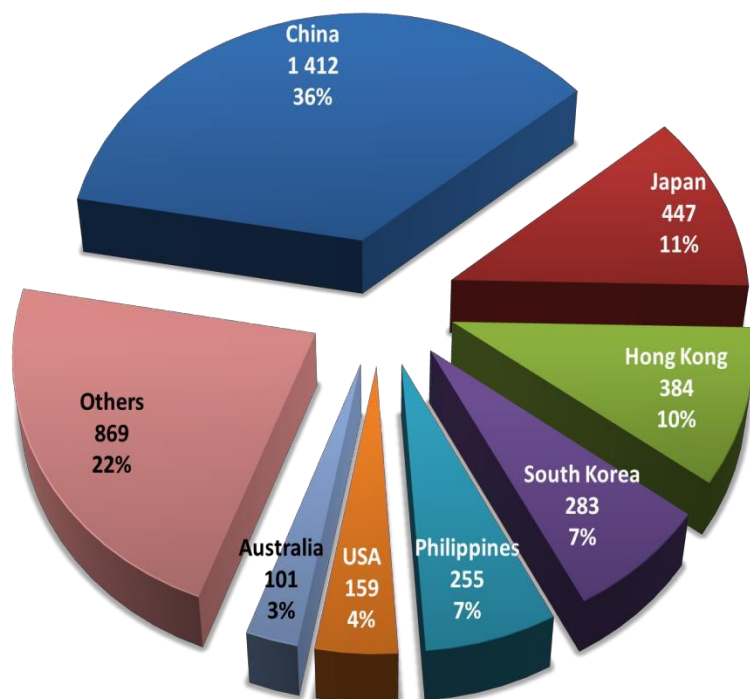


**EU MS Main exporters
(million euros - 2017 data)**

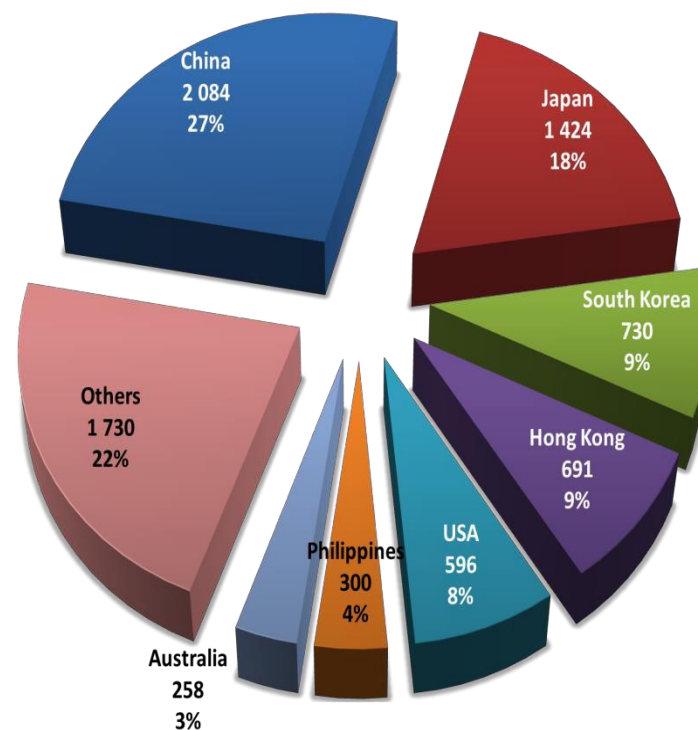




EU pigmeat export destinations
(1 000 tonnes - 2017 data)



EU pigmeat export destinations
(million euros - 2017 data)

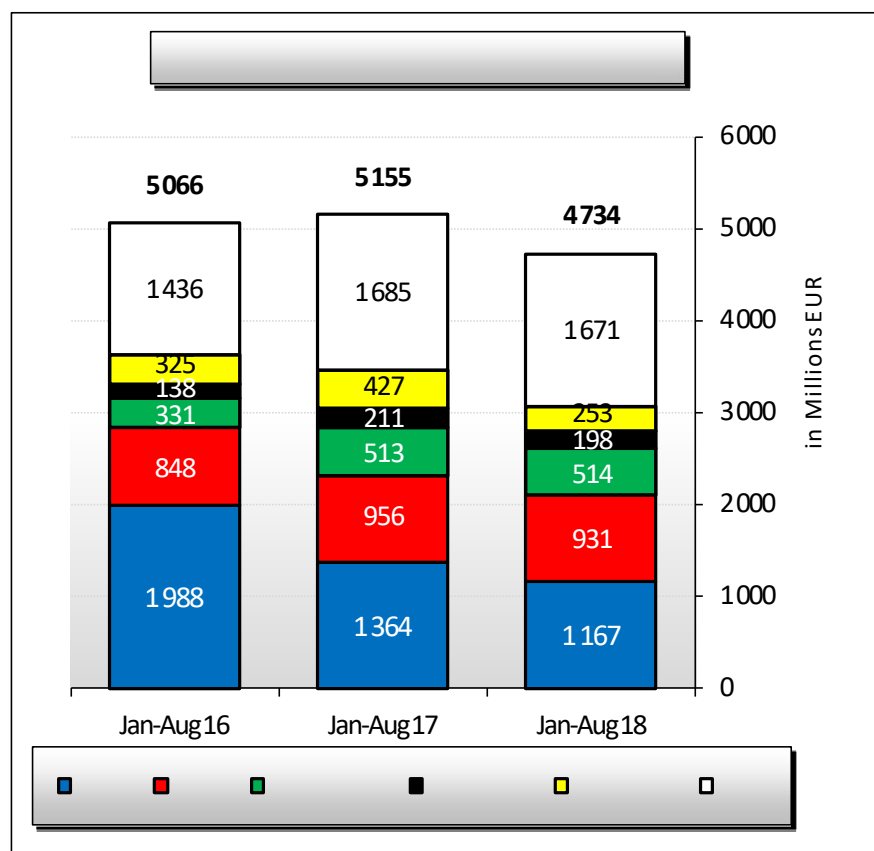
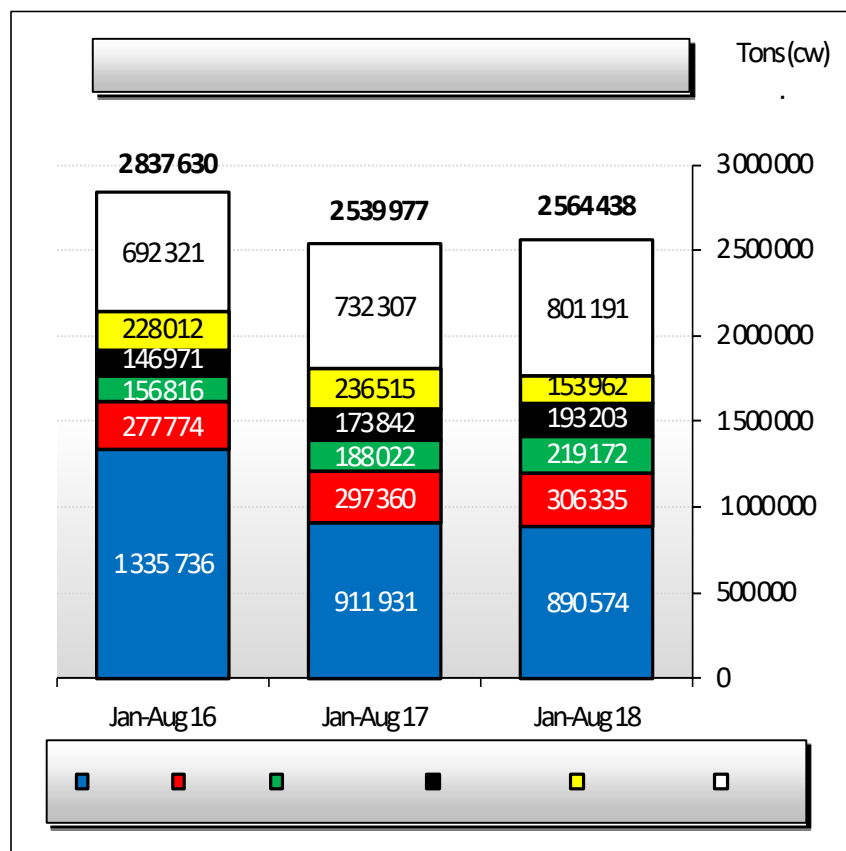




EU exports of selected PIG products: Trade figures (COMEXT – tonnes carcass weight)

	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%		

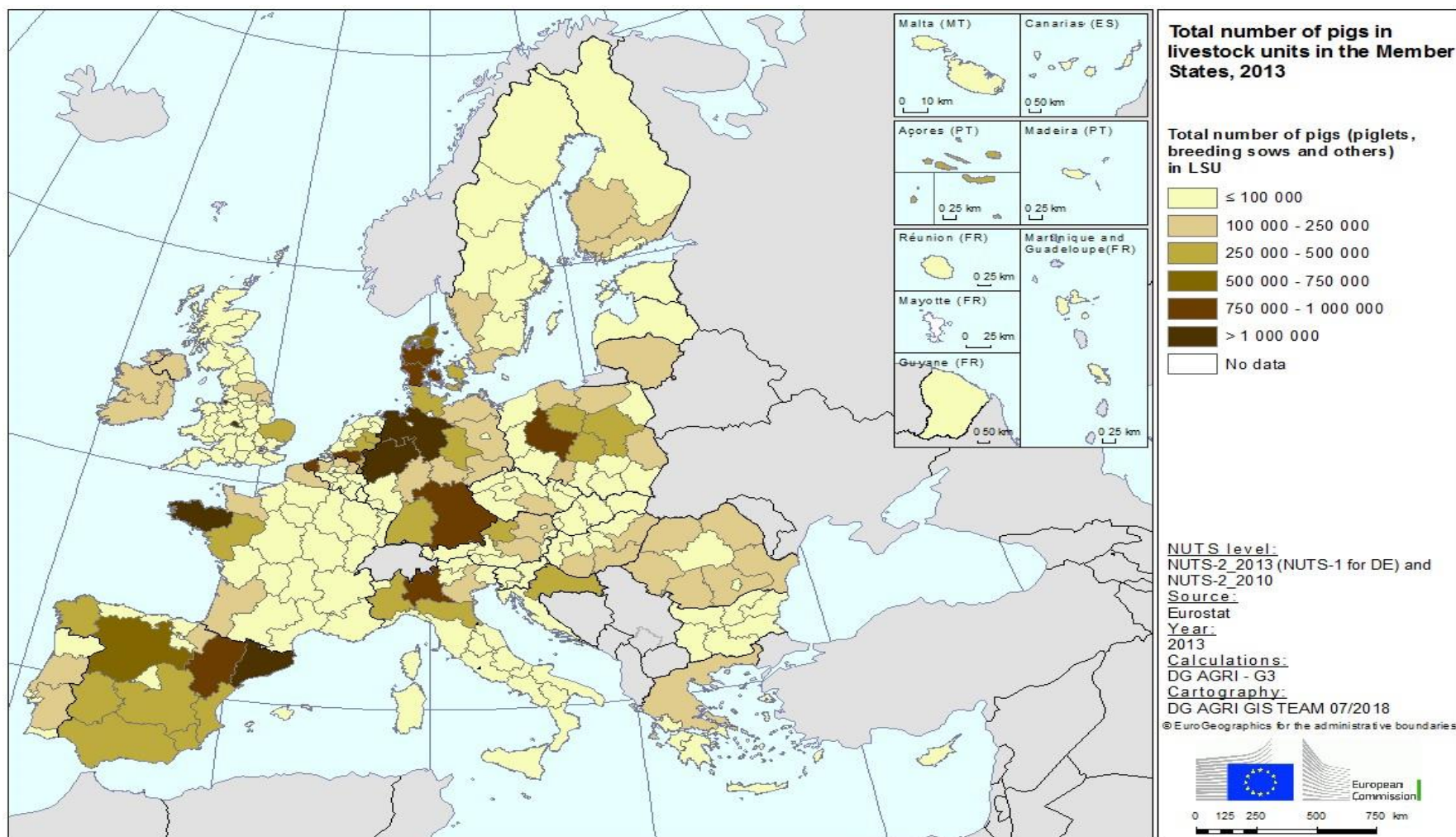
EU exports of selected PIG products Trade figures (COMEXT – tonnes carcass weight)



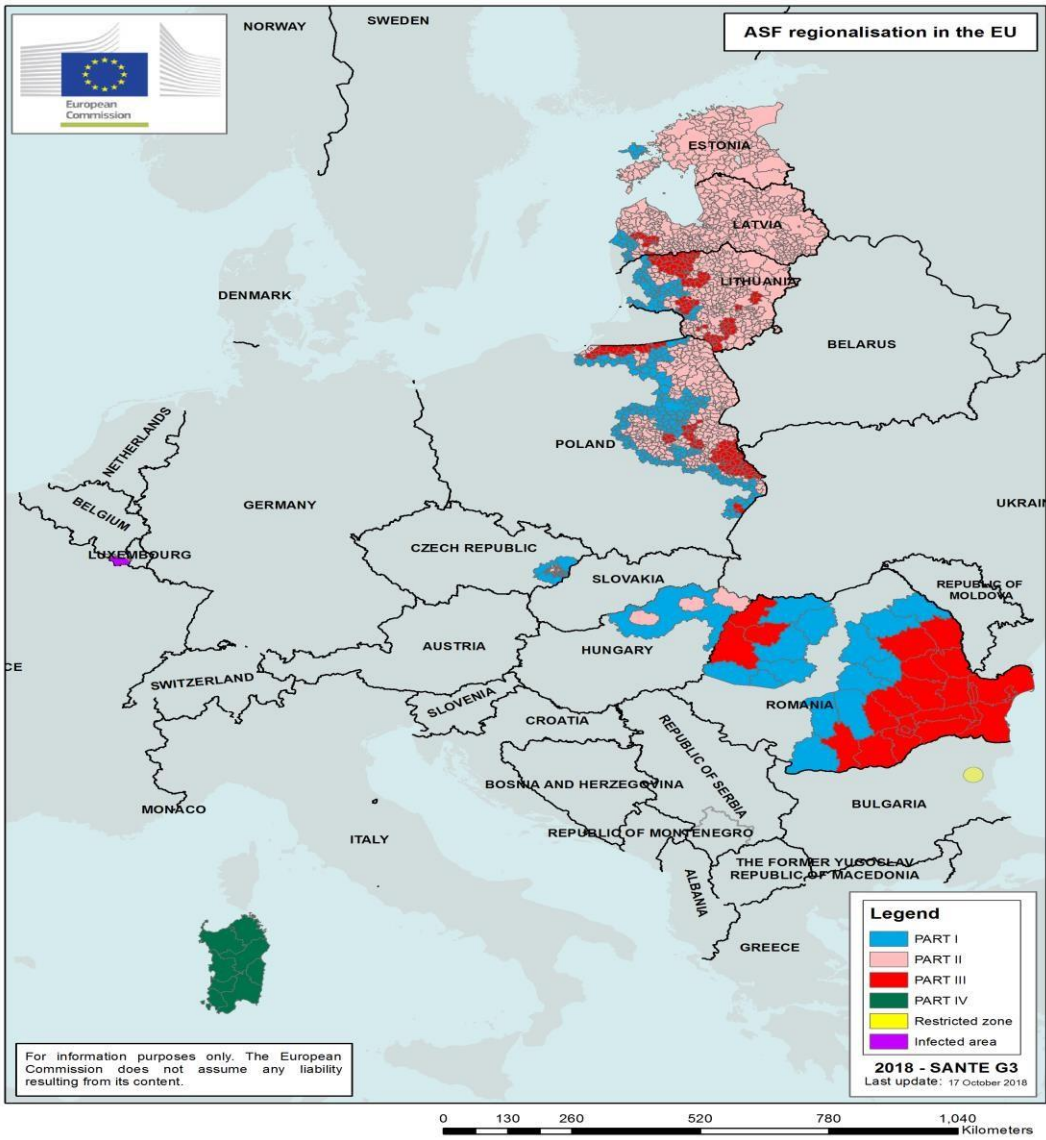


The current challenges for the EU pig exports

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ASF REGIONALISATION





Thank you for your attention!

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