

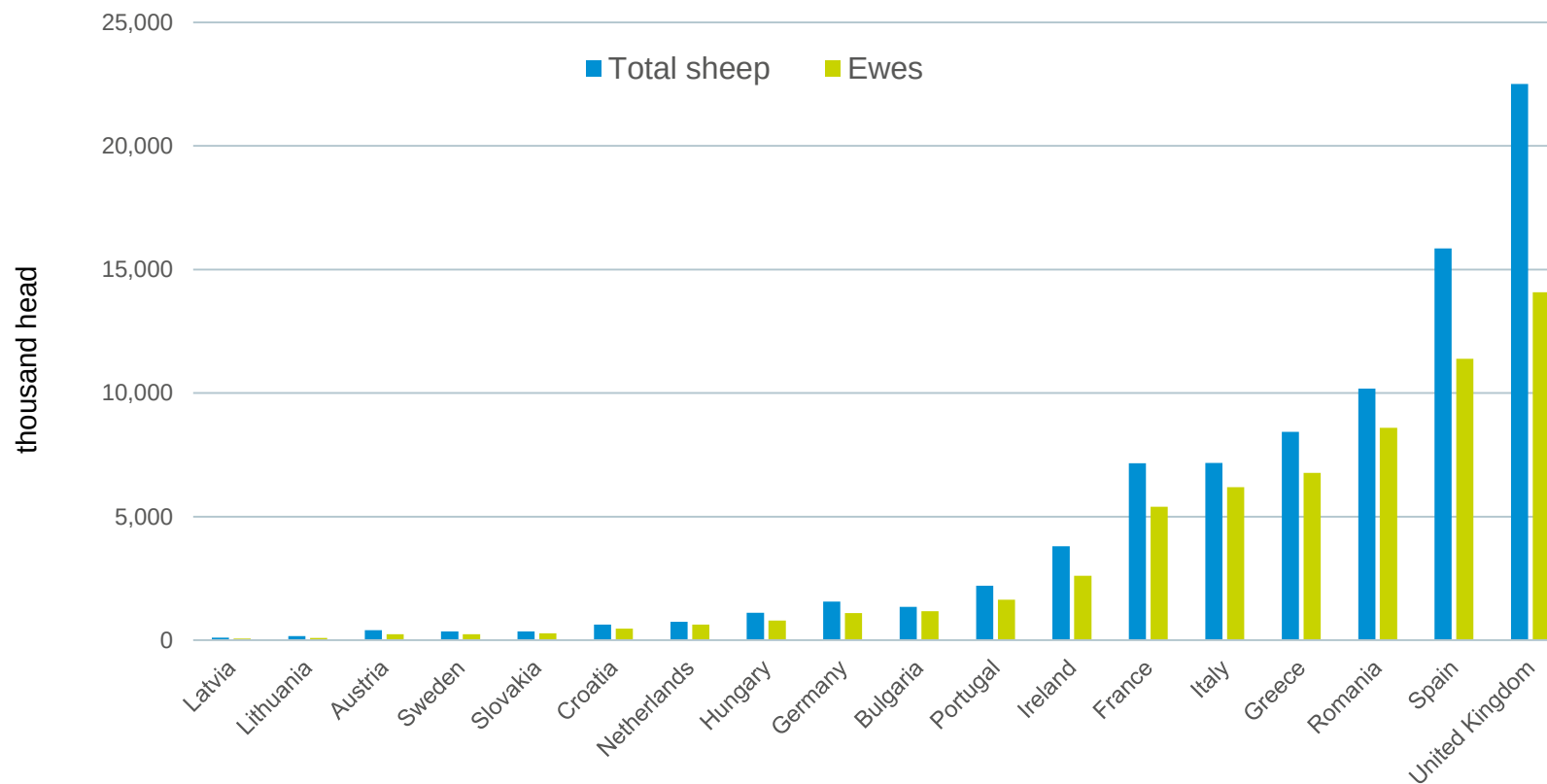
# Trends in the European Sheep and Goat sector - Production and Consumption

December 2019



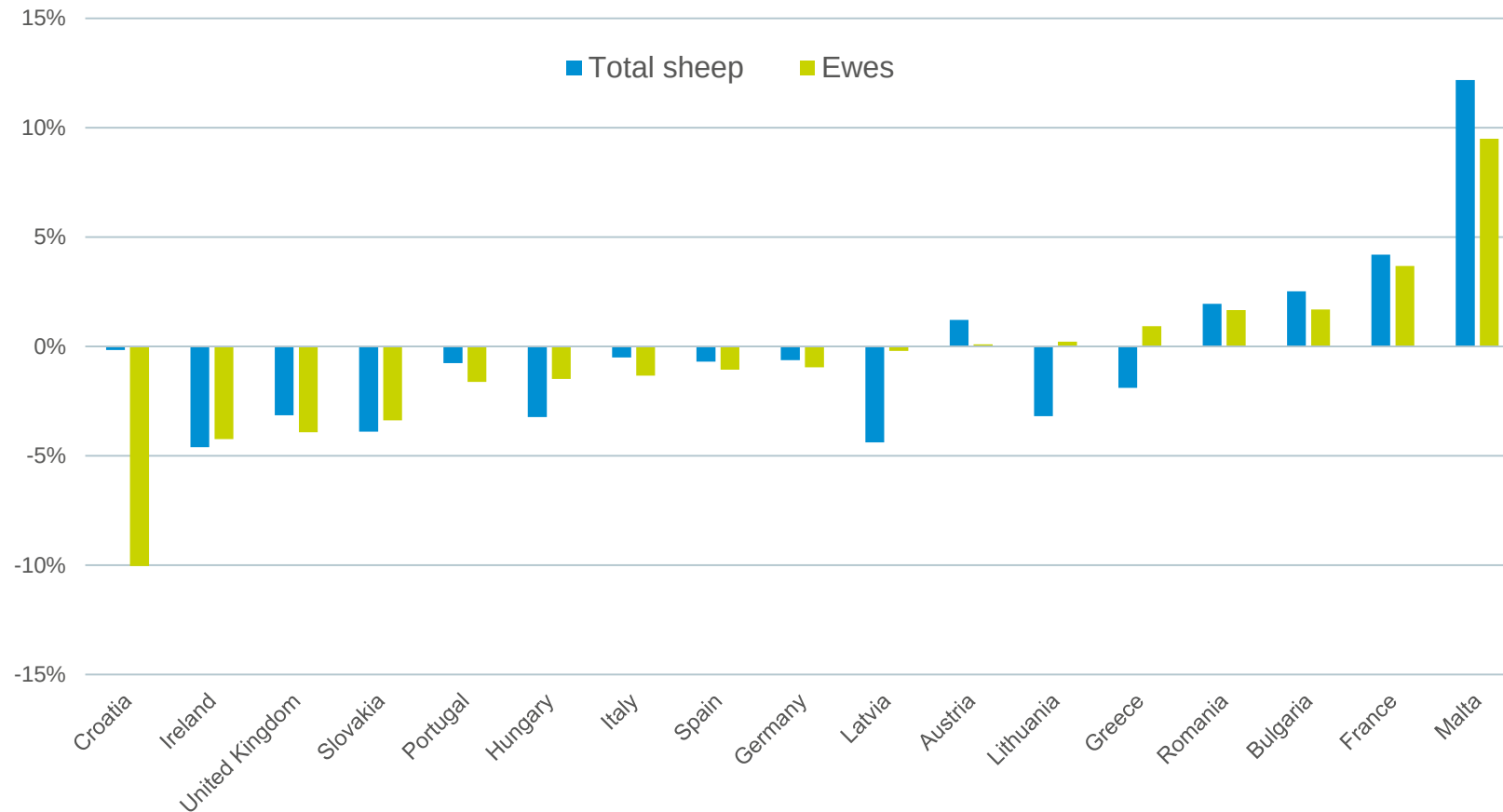
BEEF & LAMB

## Sheep and ewe numbers in selected EU Member States, December 2018



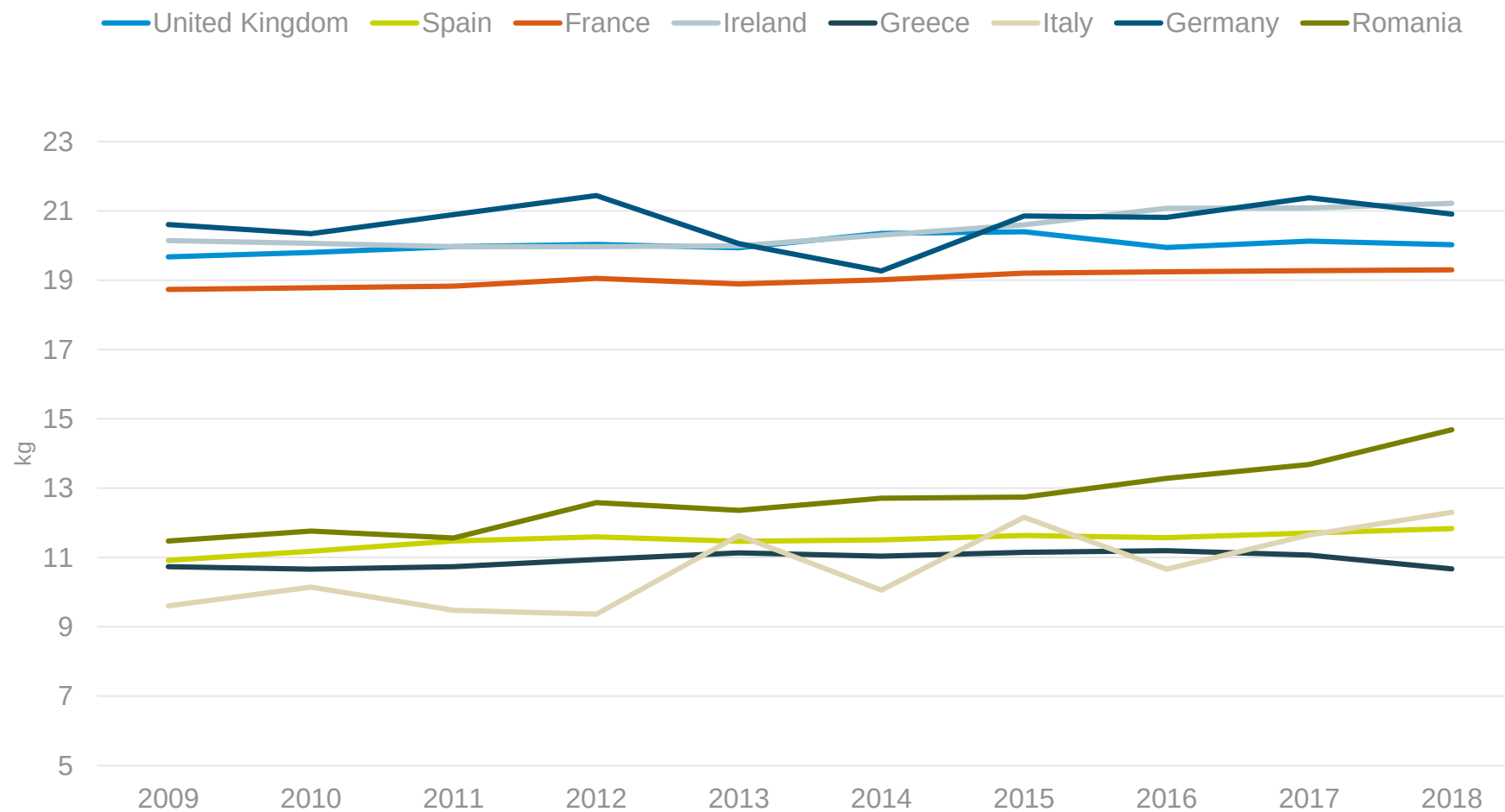
Source: Eurostat

## Annual change in sheep and ewe numbers in selected EU Member States, December 2017-2018



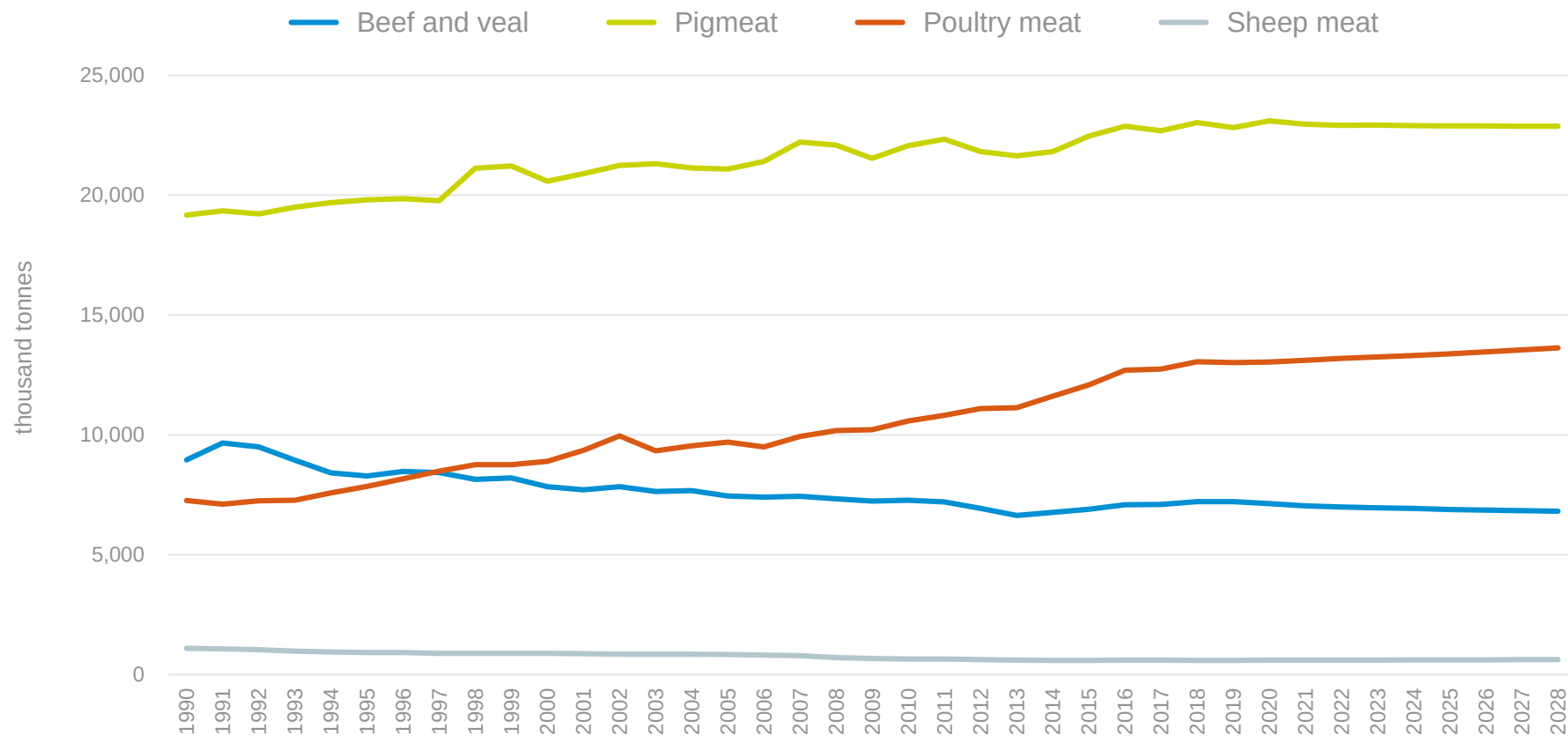
Source: Eurostat

## Carcase weights



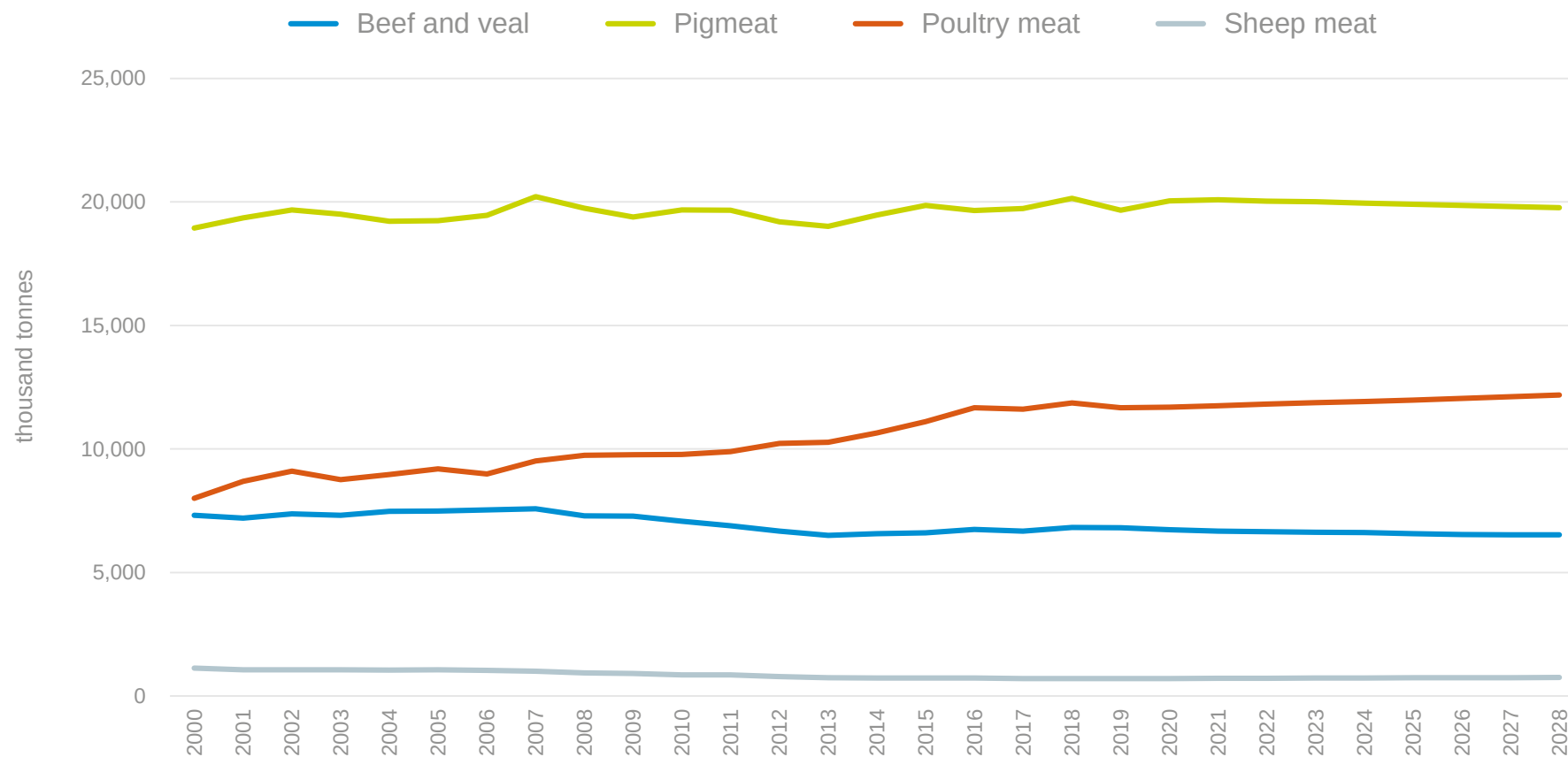
Source: Eurostat

## European meat production



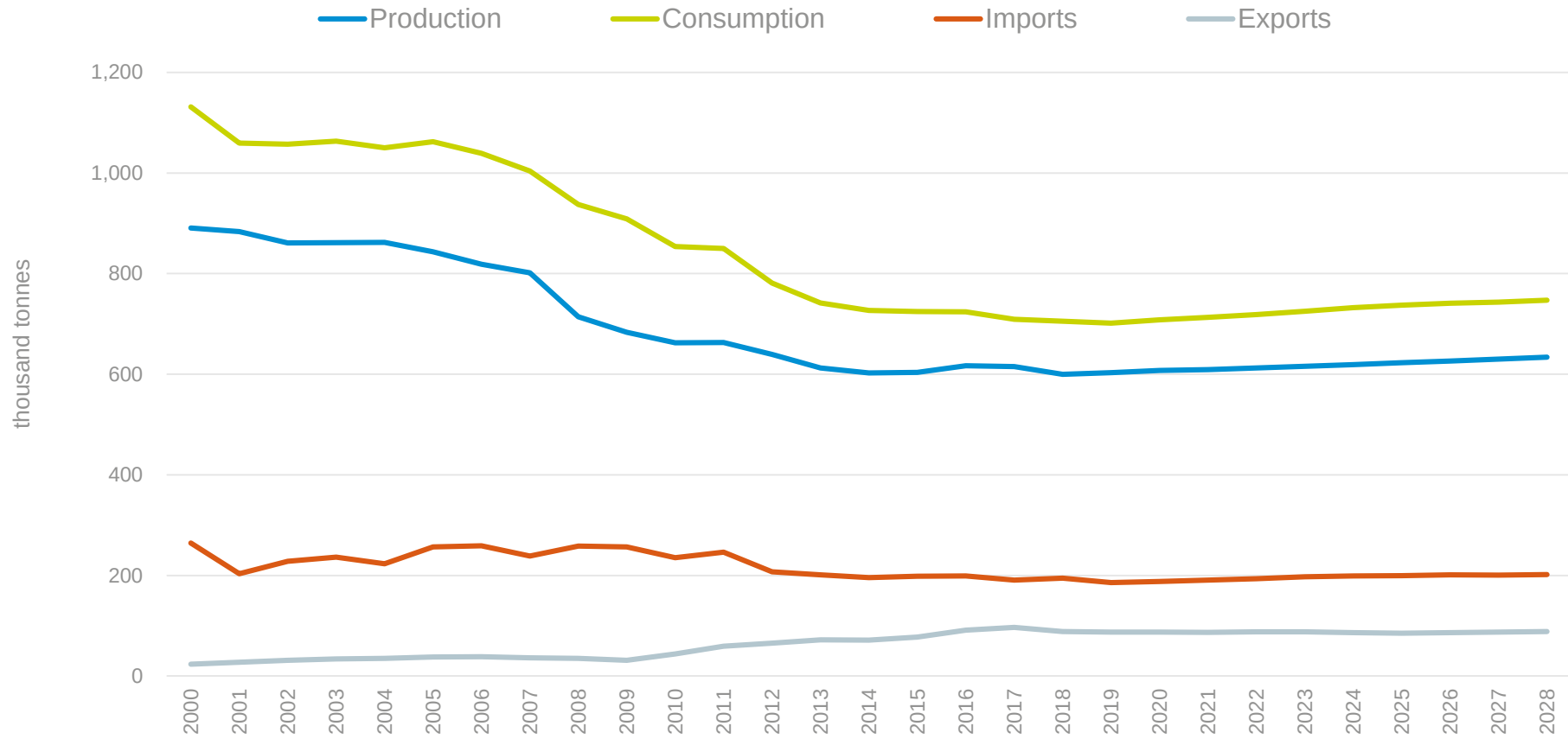
Source: FAOStats

## European meat consumption



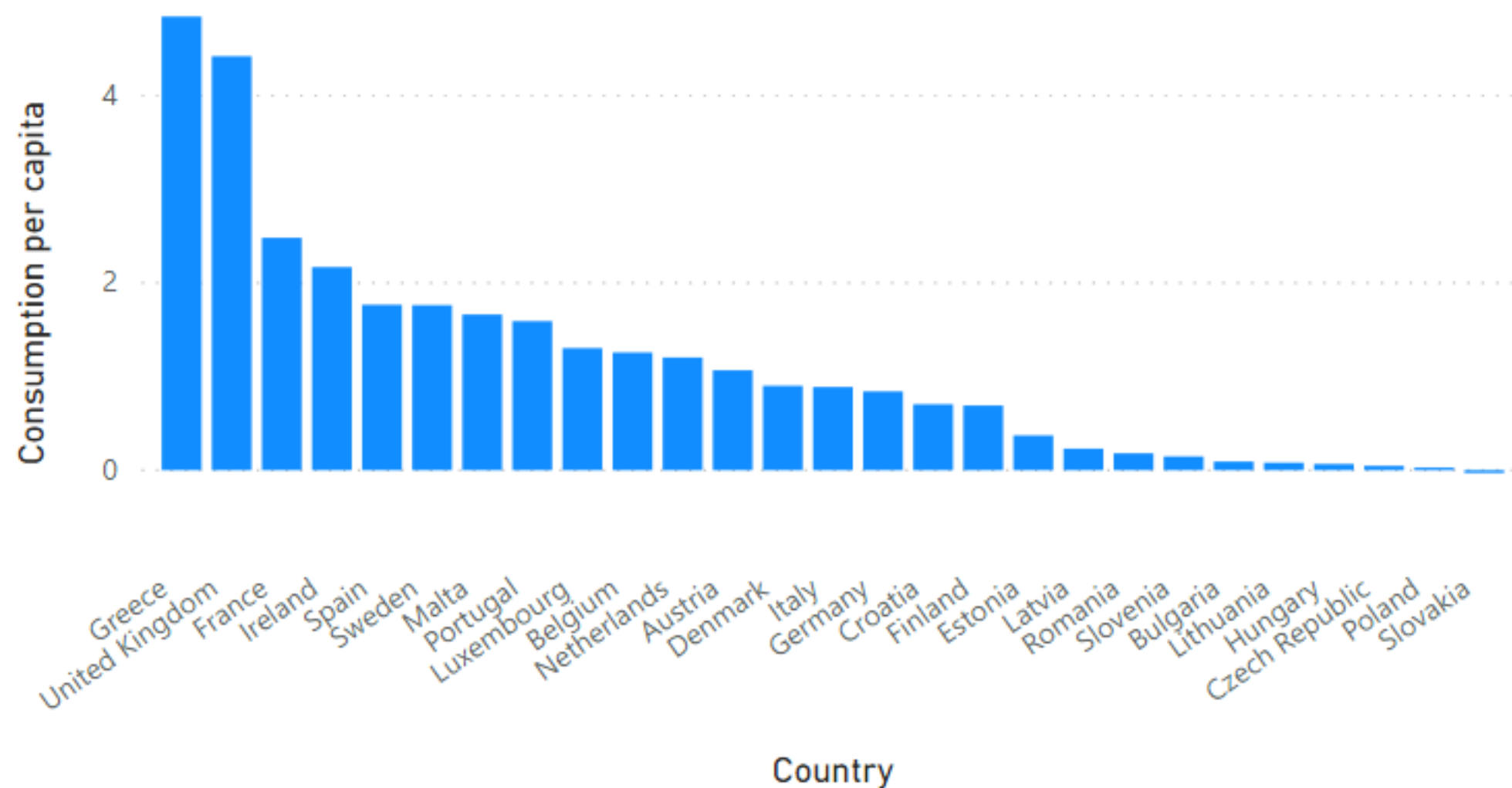
Source: FAOStats

## European sheep meat balance



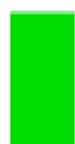
Source: FAOStats

## Consumption per capita by Country





### Top 5 Producers



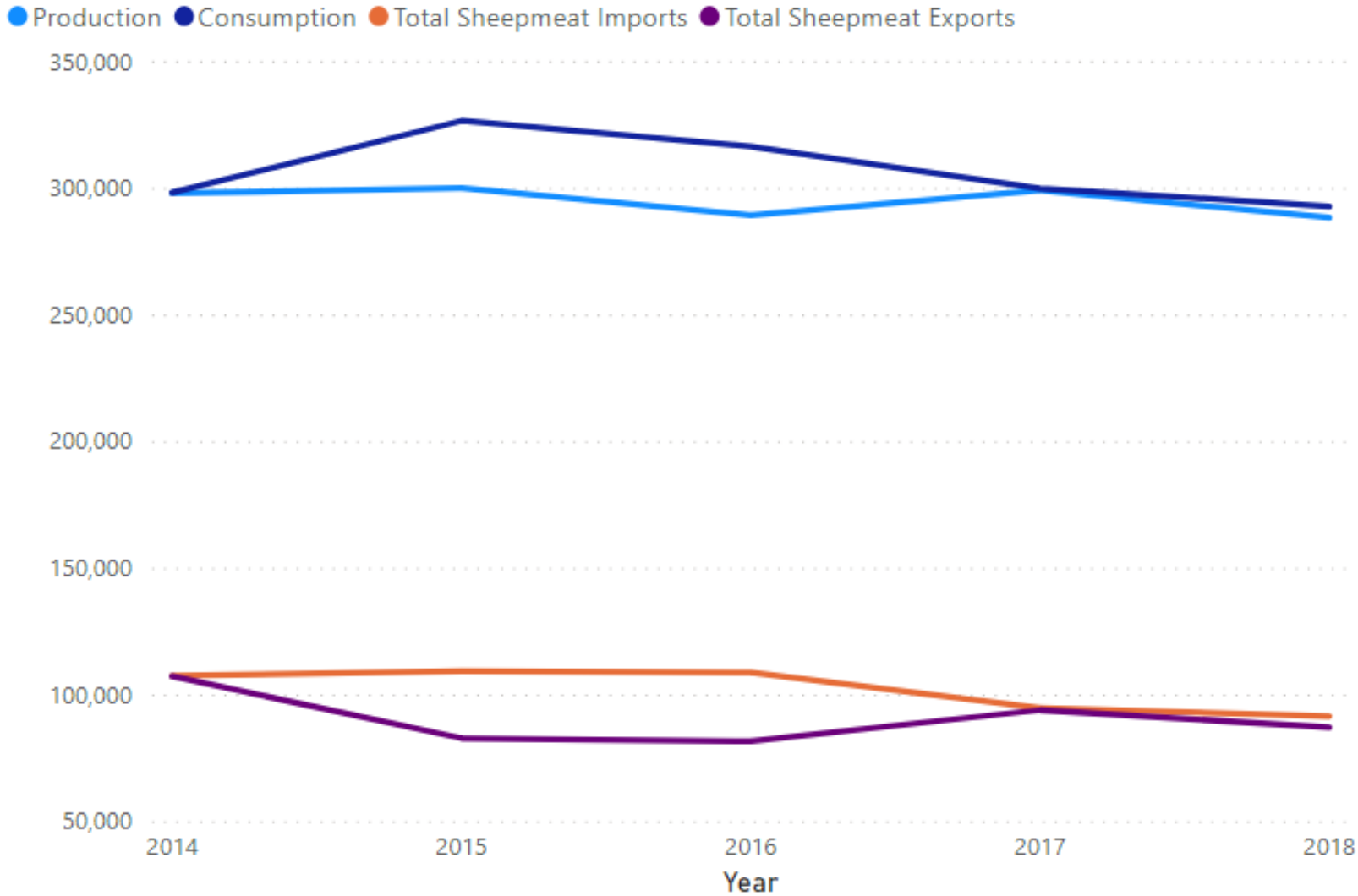
| 2018<br>% of EU28    | UK  | FR  | IE  | RO  | ES  | Total |
|----------------------|-----|-----|-----|-----|-----|-------|
| Flock                | 23% | 7%  | 4%  | 10% | 16% | 60%   |
| Net Production*      | 31% | 11% | 7%  | 9%  | 14% | 74%   |
| Imports**            | 23% | 23% | 1%  | 0%  | 2%  | 49%   |
| Exports**            | 29% | 5%  | 18% | 2%  | 17% | 72%   |
| Live exports**       | 3%  | 7%  | 1%  | 50% | 19% | 80%   |
| Consumption          | 28% | 17% | 2%  | 7%  | 9%  | 64%   |
| Weight in EU H price | 50% | 17% | 10% | 7%  | 4%  | 88%   |
| Weight in EU L price |     |     |     |     | 39% | 39%   |

\* Incl. estimated unofficial production

\*\* Incl. intra EU trade

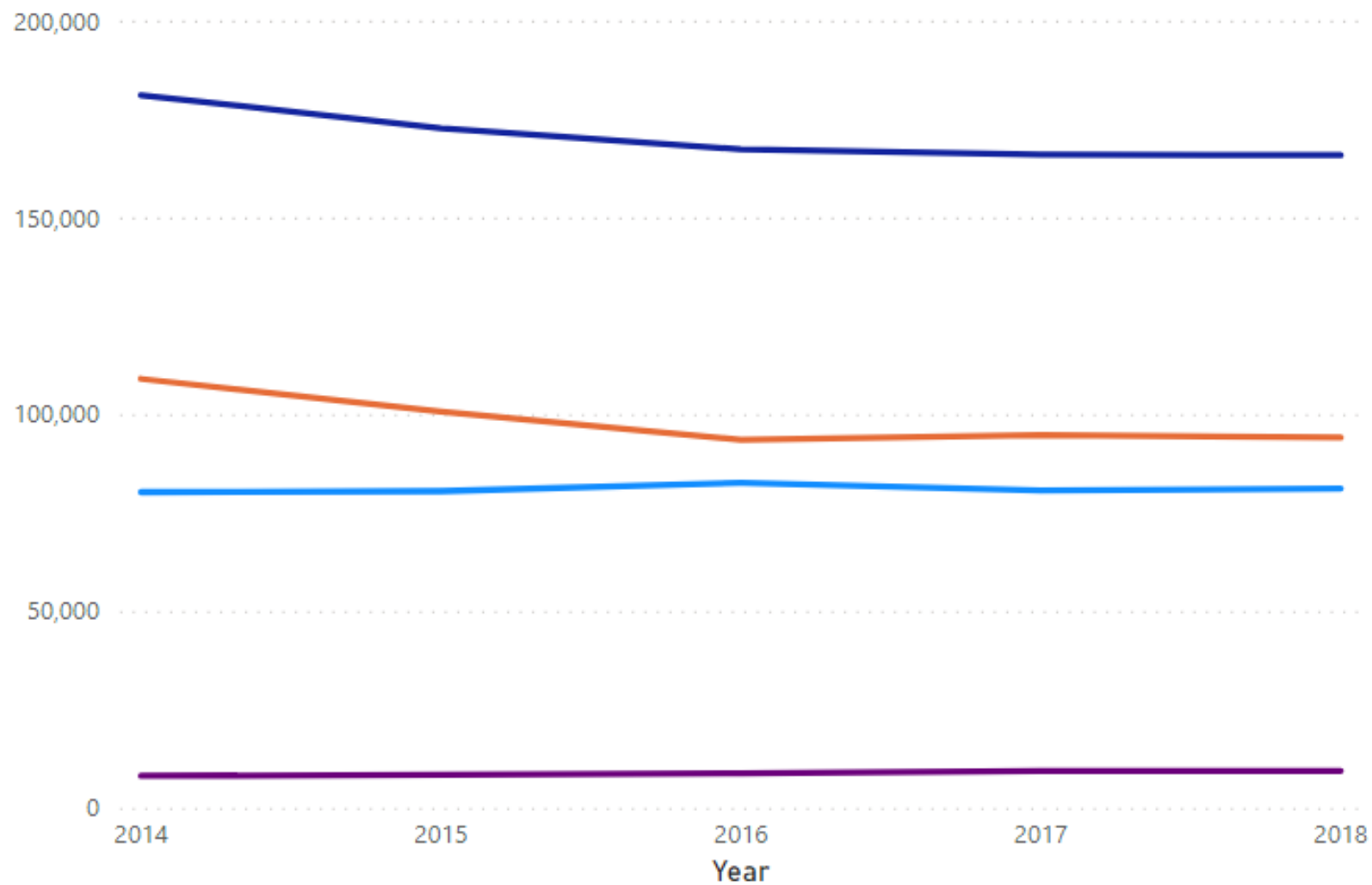
Source: GIRA

# United Kingdom - sheep meat balance (000 tonnes)

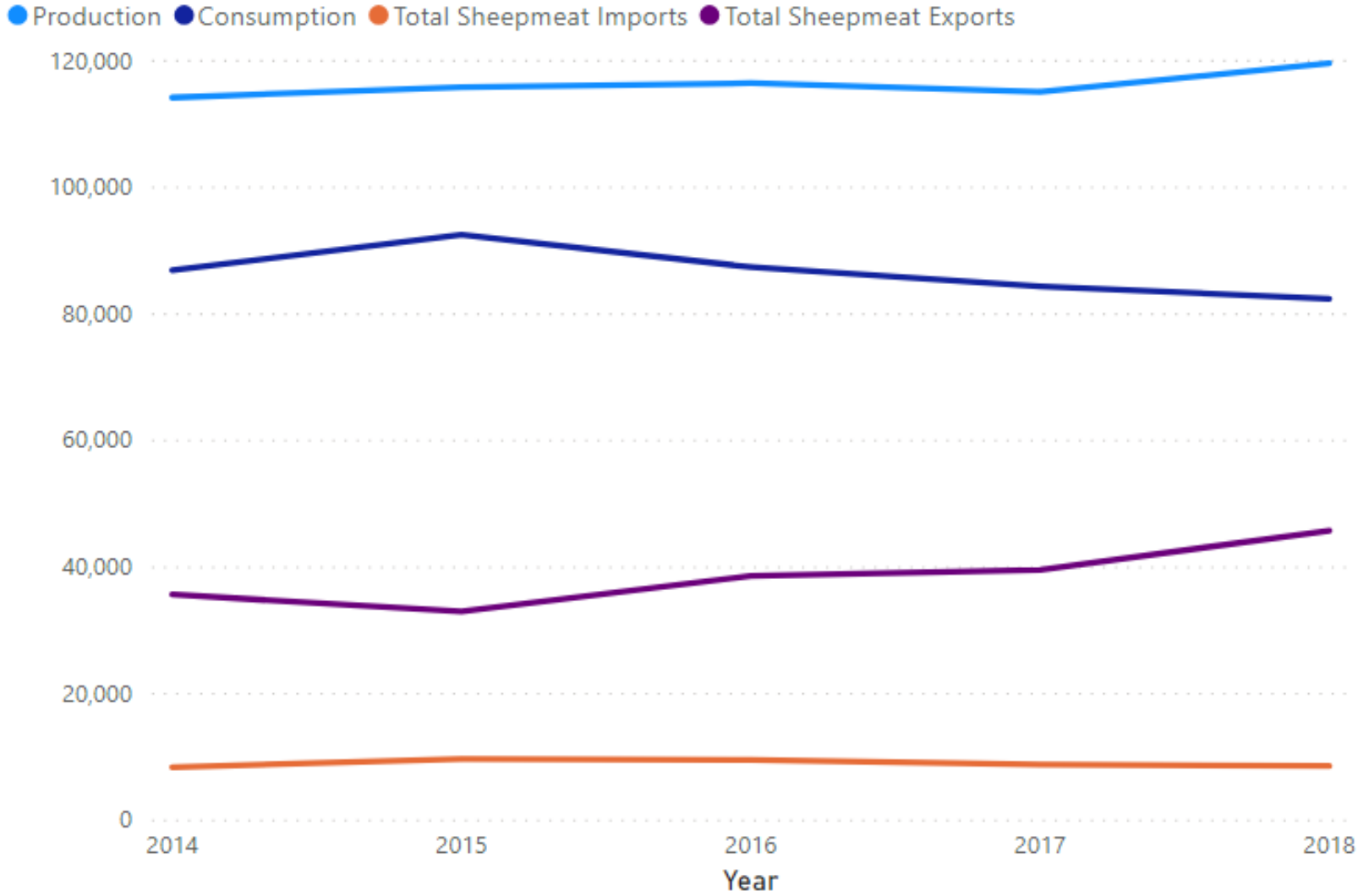


## France - sheep meat balance (000 tonnes)

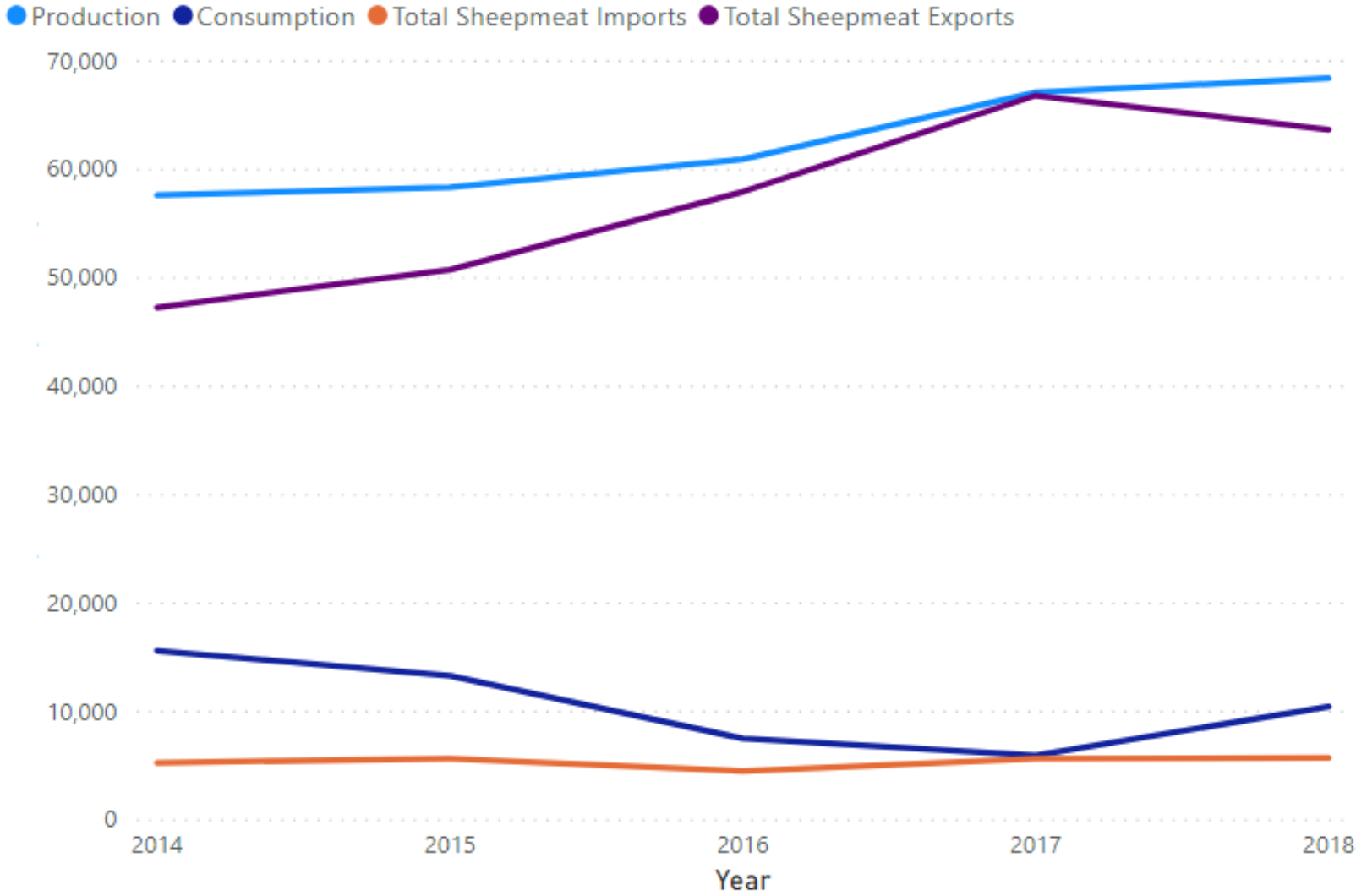
● Production ● Consumption ● Total Sheepmeat Imports ● Total Sheepmeat Exports



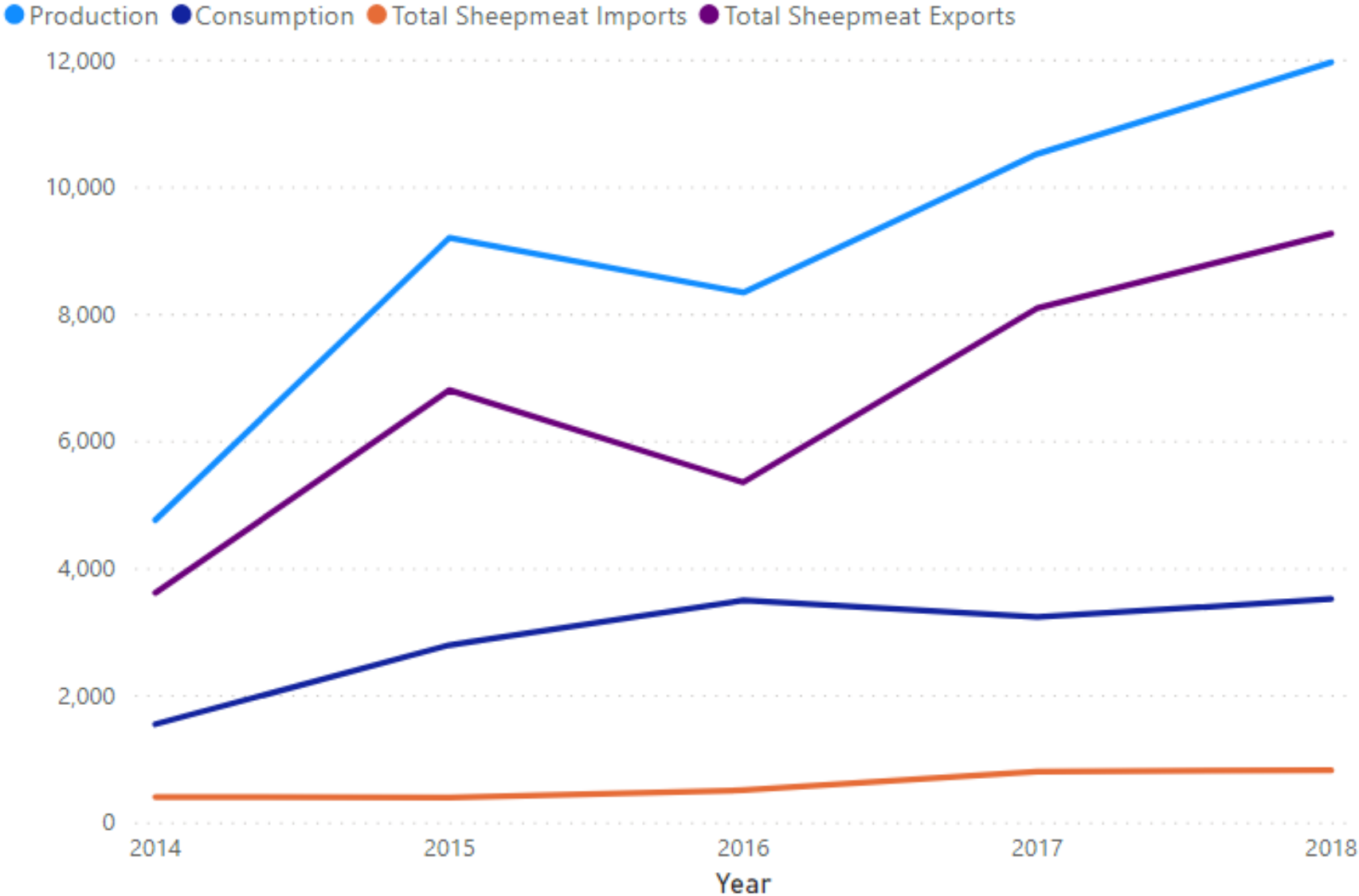
# Spain - sheep meat balance (000 tonnes)



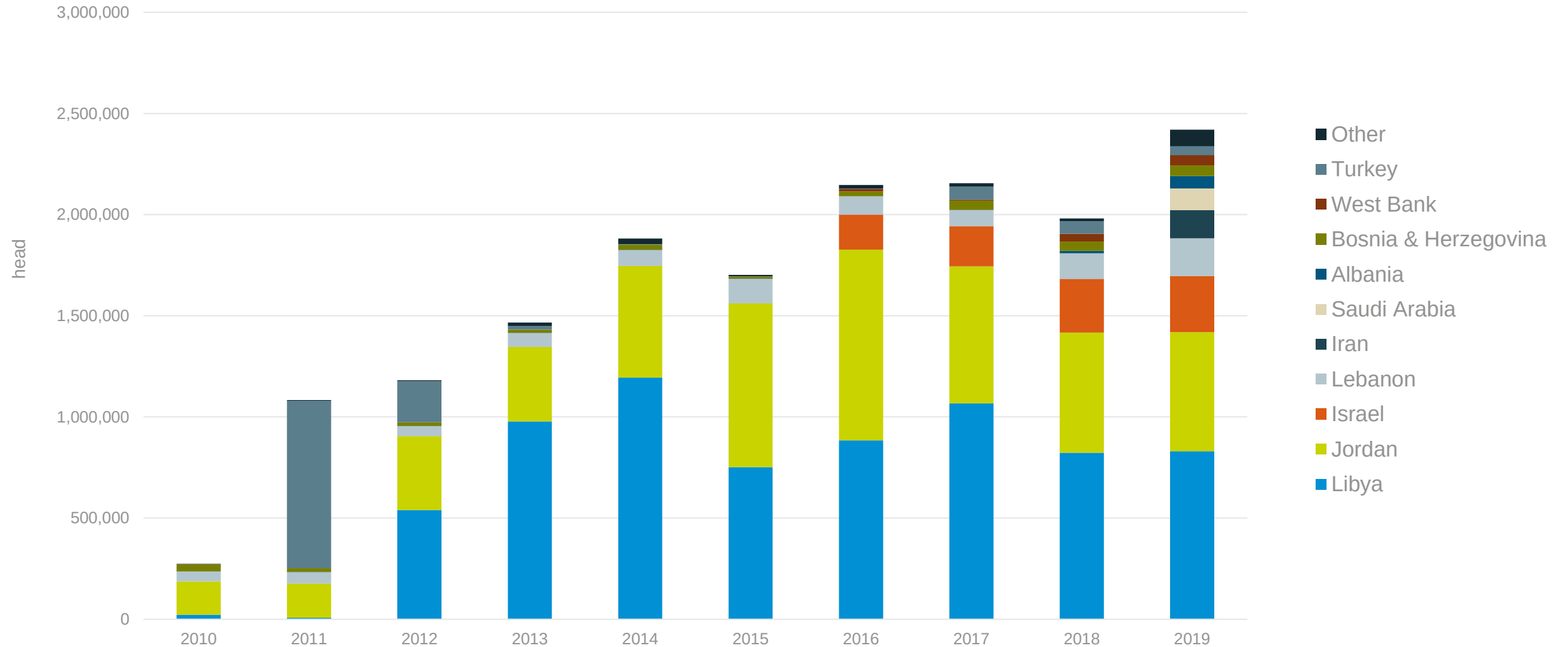
# Ireland - sheep meat balance (000 tonnes)



# Romania - sheep meat balance (000 tonnes)



## EU live export destinations, ytd



Source: IHS Maritime and Trade - Global Trade Atlas ®

# UK market outlook



**KEY POINTS**

- Breeding flock contracting
- 2019 lamb crop provisionally estimated at 17m head
- Imports to remain lower
- Exports up reflecting production growth
- Prices currently at around 5 year average

**Key 2020 Stats**



**Breeding flock: 13.9m head**



**Lamb crop: 16.6m head**

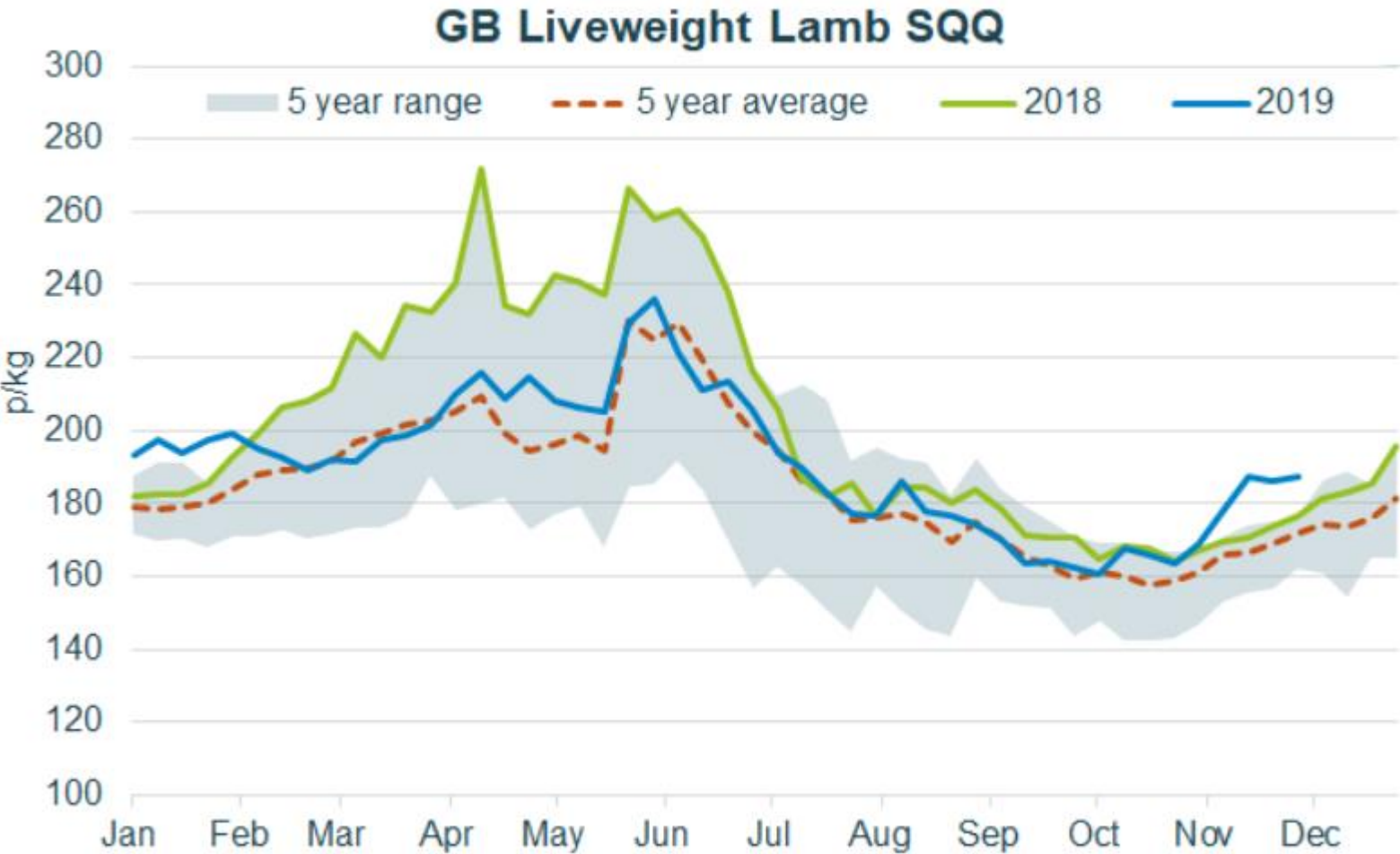


**Lamb slaughter: 12.5m head**

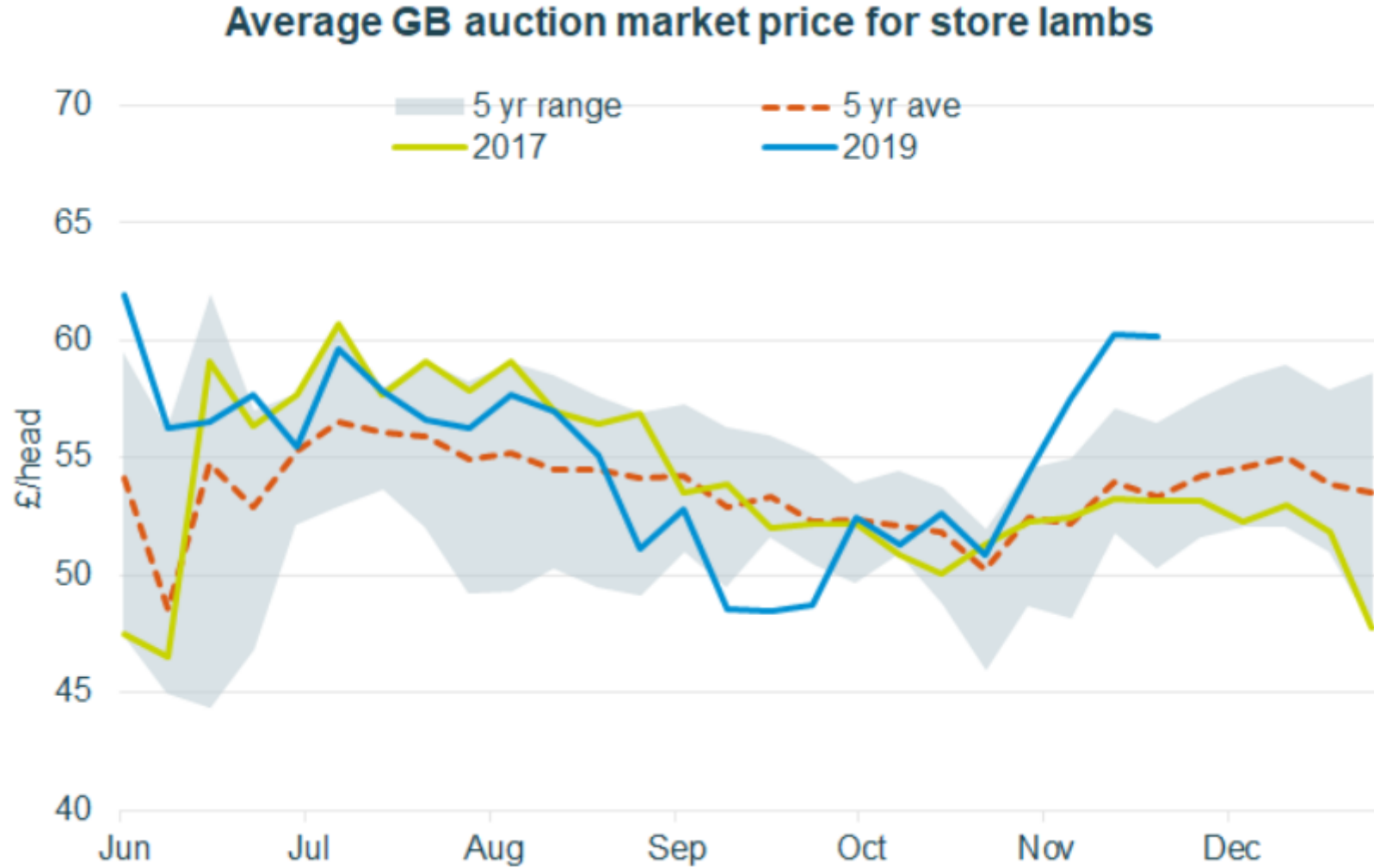


**Ewe slaughter: 1.7m head**

All figures are forecasts and subject to revision. Year-on-year changes are shown.



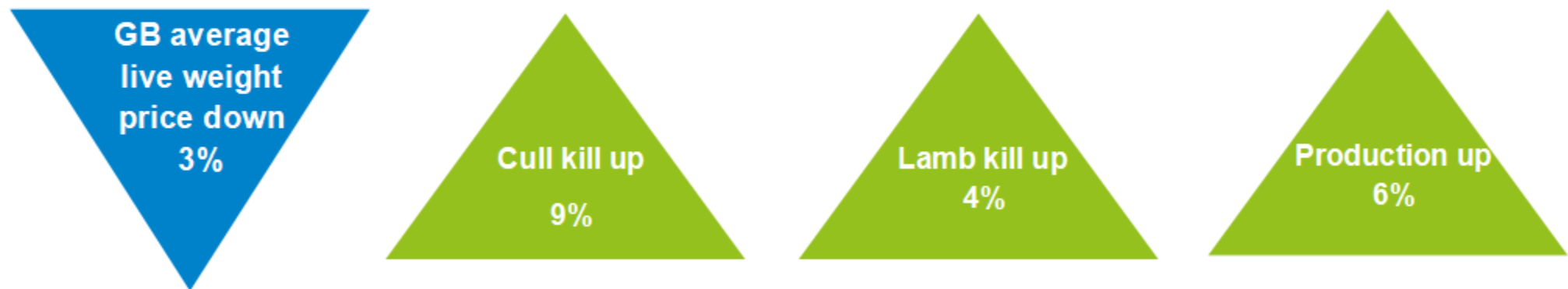
Source: AHDB, LAA, IAAS  
OSL prices from 1st Jan to 3rd week in May, then NSL prices until December



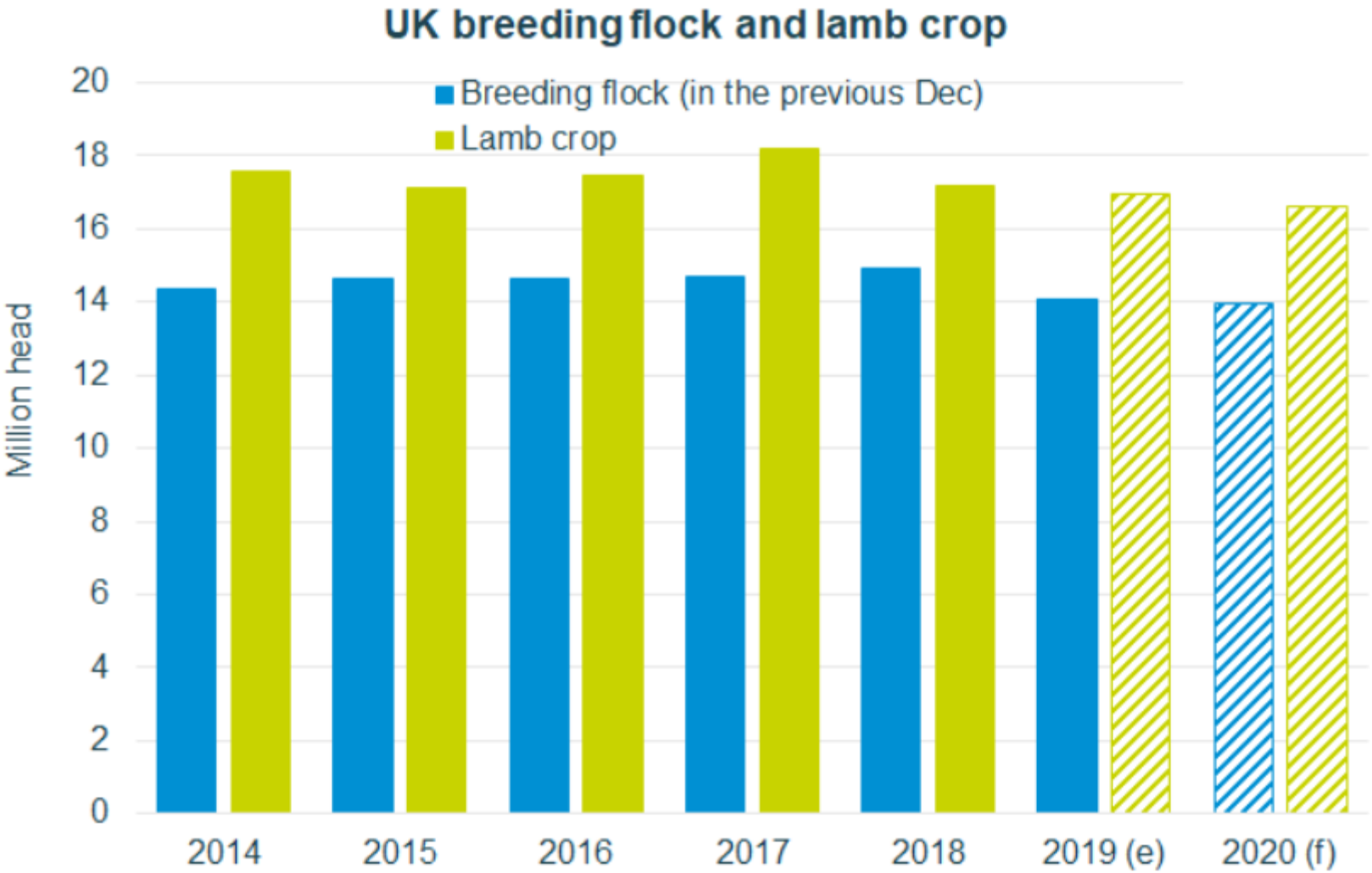
Source: AHDB/LAA/IAAS

# Current market situation

## Quarter 3 highlights



Source: AHDB/LAA/IAAS, Defra



Source: AHDB, Defra

| 000 tonnes (cwe)          | 5 yr<br>ave | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2022  |
|---------------------------|-------------|-------|-------|-------|-------|-------|-------|-------|
|                           | Year        | Year  | Year  | Year  | Year  | Year  | Year  | Year  |
| Production                | 296.6       | 290.3 | 299.3 | 288.6 | 303.8 | 287.3 | 282.8 | 278.5 |
| Imports                   | 101.0       | 109.0 | 94.7  | 91.8  | 73.5  | 69.0  | 72.0  | 71.5  |
| Exports                   | 96.2        | 82.3  | 94.2  | 87.2  | 93.4  | 79.1  | 79.8  | 78.6  |
| Available for consumption | 301.4       | 317.0 | 299.9 | 293.3 | 283.9 | 277.3 | 275.0 | 271.5 |

# Thank you

[duncan.wyatt@ahdb.org.uk](mailto:duncan.wyatt@ahdb.org.uk)

0247 647 8856



A vibrant landscape of a green field at sunset. A path leads from the foreground towards the horizon where the sun is setting, casting a warm glow over the scene. The sky is filled with colorful clouds, and the field is lush and green. In the foreground, there are several thin, white, wavy lines that sweep across the bottom of the frame.

**‘Inspiring our farmers, growers  
and industry to succeed in a  
rapidly changing world’**