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

December 2019
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

- Beef and veal
- Pigmeat
- Poultry meat
- Sheep meat

Source: FAOStats
European meat consumption

Source: FAOStats
European sheep meat balance

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

* Incl. estimated unofficial production
** Incl. intra EU trade

Source: GIRA
France - sheep meat balance (000 tonnes)

- Production
- Consumption
- Total Sheepmeat Imports
- Total Sheepmeat Exports

Year: 2014, 2015, 2016, 2017, 2018
Ireland - sheep meat balance (000 tonnes)

- Production
- Consumption
- Total Sheepmeat Imports
- Total Sheepmeat Exports
Romania - sheep meat balance (000 tonnes)

- Production
- Consumption
- Total Sheepmeat Imports
- Total Sheepmeat Exports

Year:
- 2014
- 2015
- 2016
- 2017
- 2018

Values:
- Production: 2,000 to 12,000
- Consumption: 6,000 to 11,000
- Total Sheepmeat Imports: 0 to 2,000
- Total Sheepmeat Exports: 4,000 to 9,000
EU live export destinations, ytd

Source: IHS Martitime and Trade - Global Trade Atlas ®
UK market outlook
Lamb market update

**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 (-1%)
- Lamb crop: 16.6m head (-2%)
- Lamb slaughter: 12.5m head (-4%)
- Ewe slaughter: 1.7m head (-3%)

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
Lamb market update

Average GB auction market price for store lambs

- 5 yr range
- 5 yr ave
- 2017
- 2019

£/head

Source: AHDB/LAA/IAAS
Current market situation

Quarter 3 highlights

- GB average live weight price down 3%
- Cull kill up 9%
- Lamb kill up 4%
- Production up 6%

Source: AHDB/LAMIAAS, Defra
Lamb market update

UK breeding flock and lamb crop

- Breeding flock (in the previous Dec)
- Lamb crop

Source: AHDB, Defra

2014: 14 million head, 18 million head
2015: 14 million head, 18 million head
2016: 14 million head, 18 million head
2017: 14 million head, 18 million head
2018: 14 million head, 18 million head
2019 (e): 14 million head, 18 million head
2020 (f): 14 million head, 18 million head
## Lamb market update

<table>
<thead>
<tr>
<th>000 tonnes (cwe)</th>
<th>5 yr ave</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Production</strong></td>
<td>296.6</td>
<td>290.3</td>
<td>299.3</td>
<td>288.6</td>
<td>303.8</td>
<td>287.3</td>
<td>282.8</td>
<td>278.5</td>
</tr>
<tr>
<td><strong>Imports</strong></td>
<td>101.0</td>
<td>109.0</td>
<td>94.7</td>
<td>91.8</td>
<td>73.5</td>
<td>69.0</td>
<td>72.0</td>
<td>71.5</td>
</tr>
<tr>
<td><strong>Exports</strong></td>
<td>96.2</td>
<td>82.3</td>
<td>94.2</td>
<td>87.2</td>
<td>93.4</td>
<td>79.1</td>
<td>79.8</td>
<td>78.6</td>
</tr>
<tr>
<td><strong>Available for consumption</strong></td>
<td>301.4</td>
<td>317.0</td>
<td>299.9</td>
<td>293.3</td>
<td>283.9</td>
<td>277.3</td>
<td>275.0</td>
<td>271.5</td>
</tr>
</tbody>
</table>
Thank you

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