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TRANSFIRIENDO CONOCIMIENTO

#FORUMCARNICO2016  
SÍGUENOS EN TWITTER: @ie\_jornadas

MARTES, 4 DE OCTUBRE DE 2016  
BARCELONA WORLD TRADE CENTER - SALÓ PORT VELL

# I FÓRUM CÁRNICO: Escenario de futuro del sector



PATROCINADORES:



EMPRESAS EXPOSITORAS:



PROMOTOR:



ORGANIZADOR:



TRANSPORTISTA  
AÉREO PREFERENTE:



# I FORUM CARNICO FECIC

Barcelona, 4 Octubre 2016



Mercados de vacuno y porcino en la UE  
Luis Carazo Jimenez, DG AGRI

# Estructura de la presentación

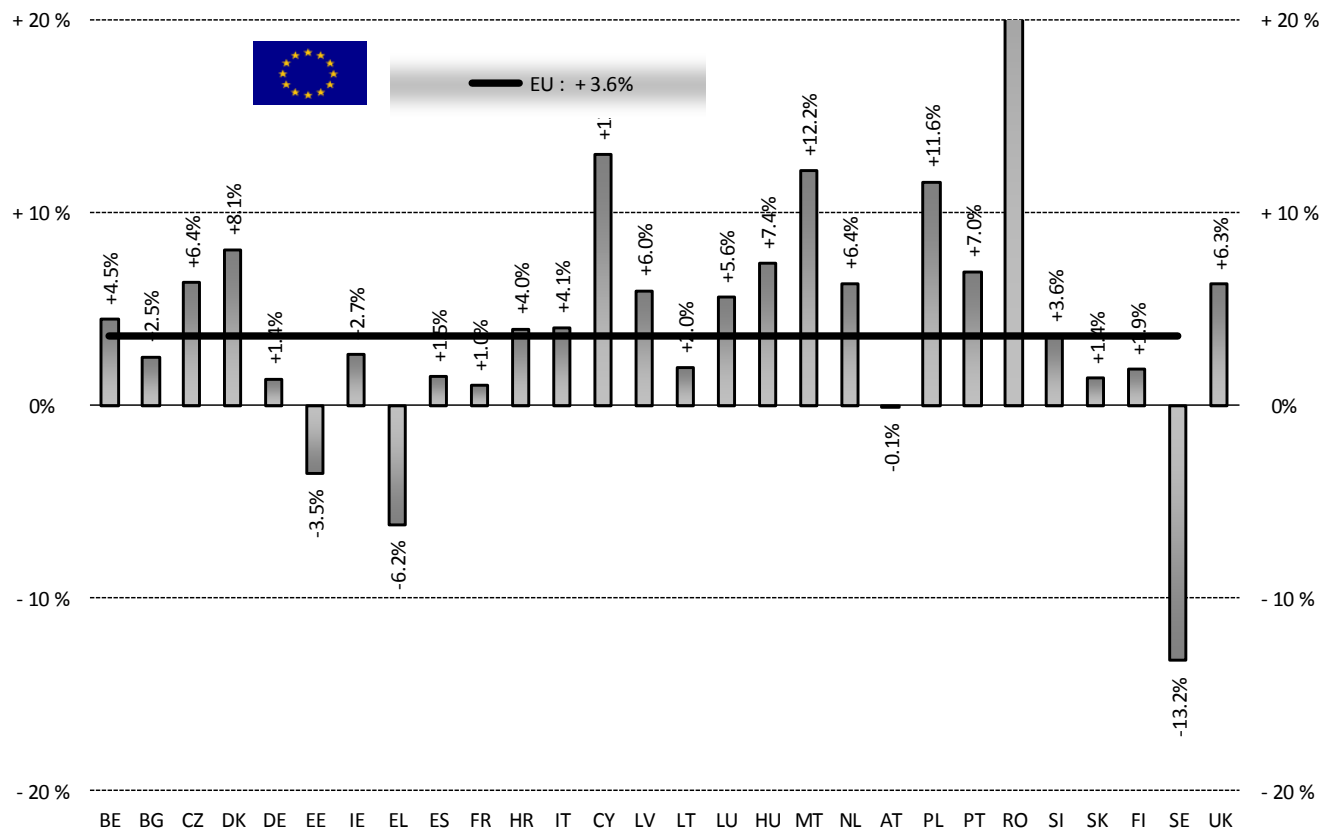
- *I: Situación del mercado de vacuno*
- *II: Situación del mercado del porcino*
- *III: Instrumentos de gestión de mercado*
- *IV: Hacia una mayor transparencia*

# PRODUCTION

# % EVOLUTION HEADS



HEADS	Jan-Jun 15/16	
	EU15	EU28
Bull	-2.0%	-0.7%
Bullock	+1.3%	+1.4%
Cow	+6.4%	+7.8%
Heifer	+4.7%	+6.0%
Calve	+3.1%	+3.1%
Young cattle	+1.3%	+2.2%
Meat of bovine animals	+2.7%	+3.6%



Estimates for last month of period :

Source : EStat - Newcronos

# PRICES CARCASSES

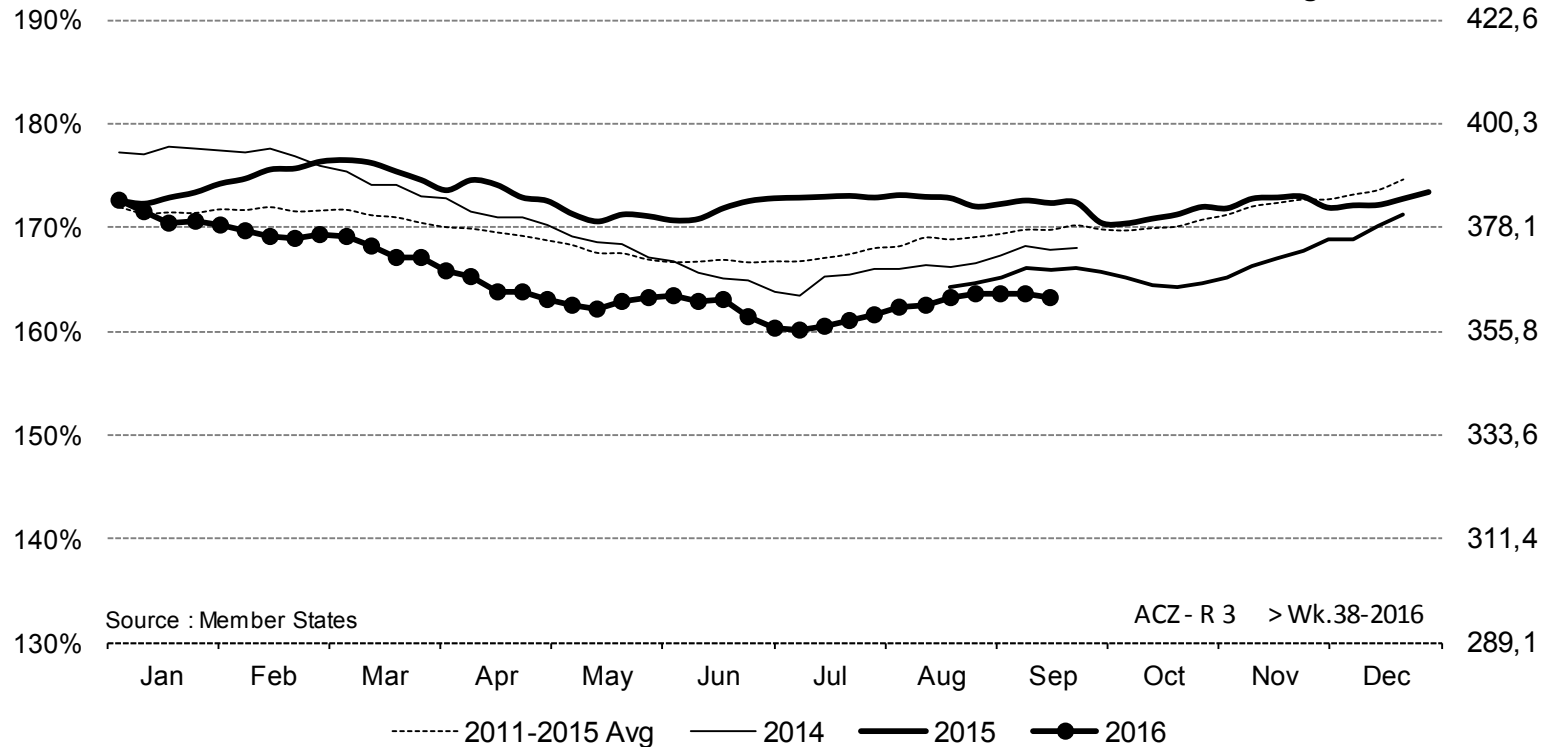
# EU EVOLUTION A/C/Z.R3



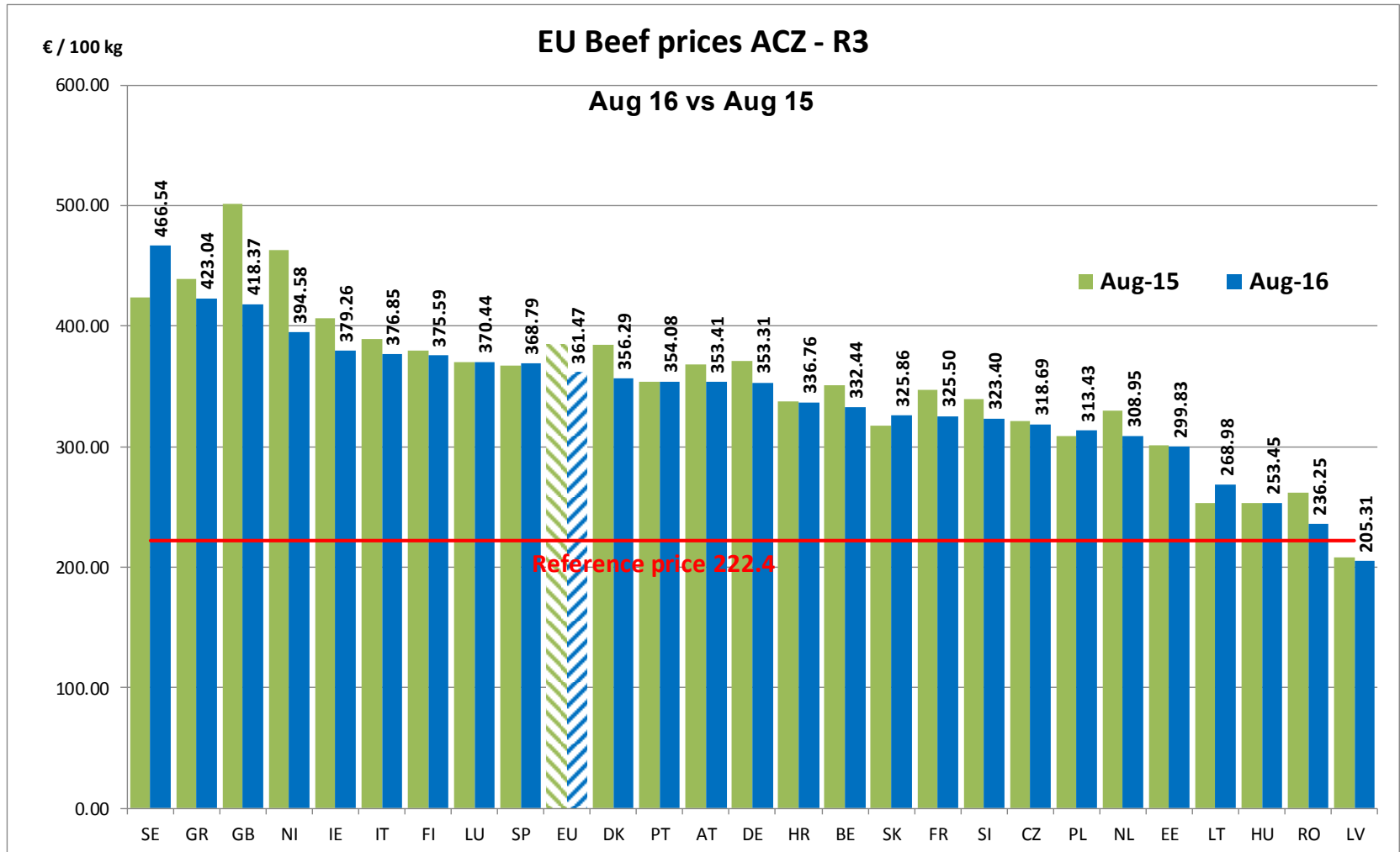
ACZ - R 3 > Wk.38-2016

% of Reference Price

€/100 kg cwe

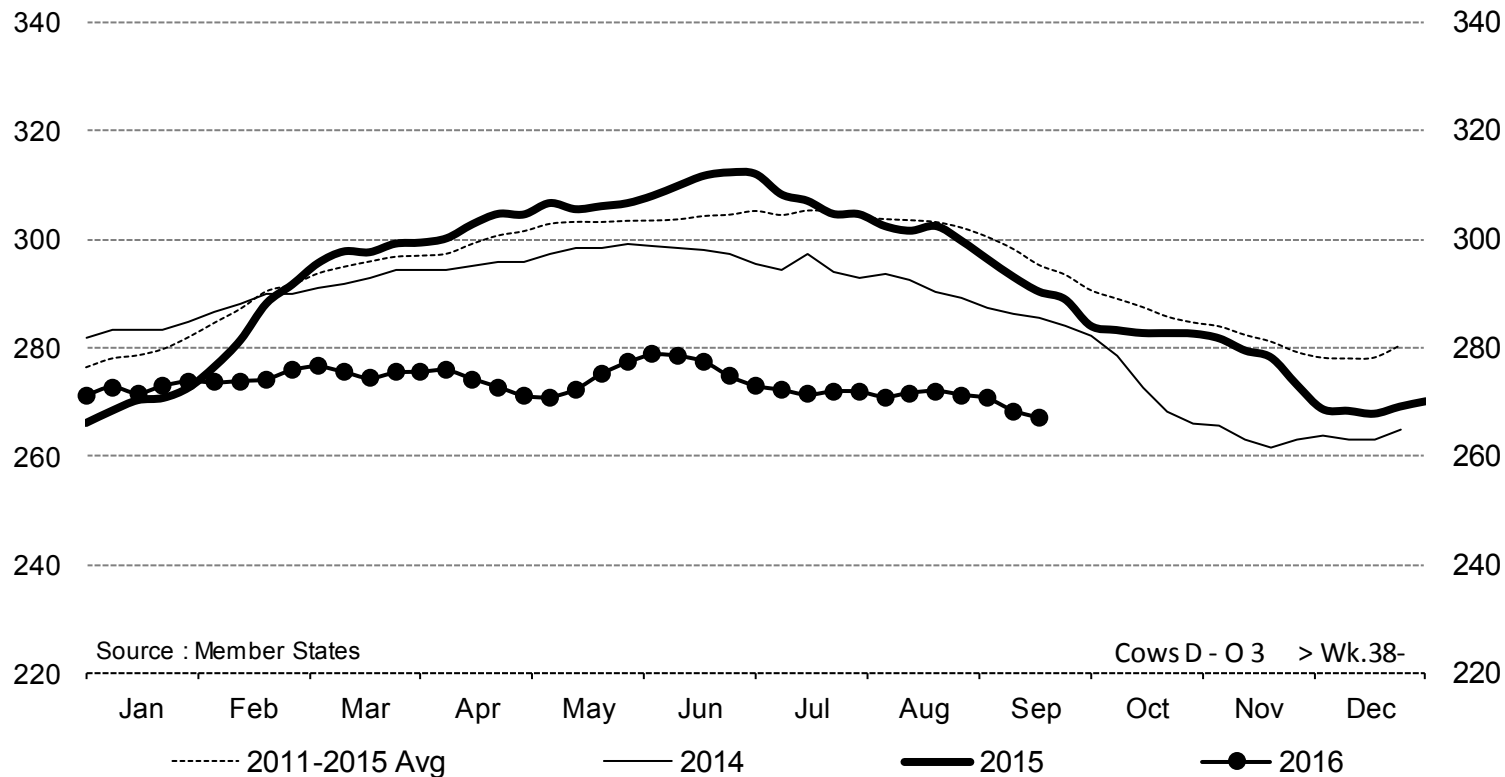


Price in week 38 :	<b>363,07</b>	Average price in August 2016 :	<b>361,47</b>
% change y/y :	<b>- 5,3%</b>	% change y/y :	<b>- 5,9%</b>
% Ref. Price in wk 38 :	<b>163,3%</b>		





## Cows D - O 3 > Wk.38-2016



Price in week 38 : **267,13**  
% change y/y : **-8,0%**

Average price in August 2016 : **271,66**  
% change y/y : **-9,9%**

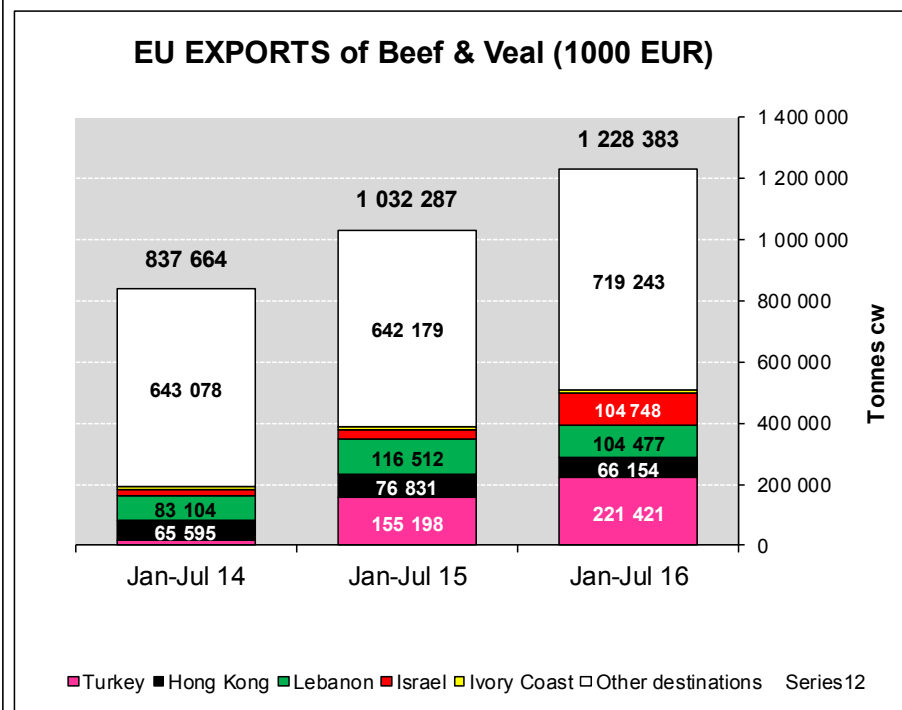
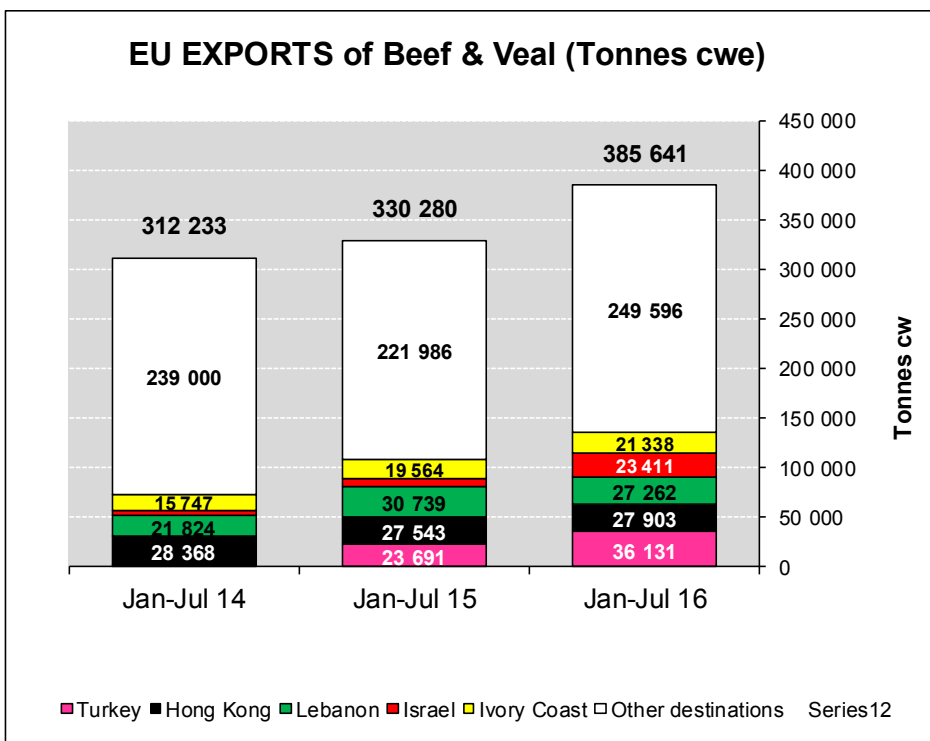
### EU exports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Destinations	2012		2013		2014		2015		Jan-Jul 16		Compared to Jan-Jul 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Turkey	101 475	19.6%	5 086	1.1%	8 098	1.4%	57 584	9.6%	36 131	9.4%	+ 52.5%
Hong Kong	17 862	3.4%	28 573	6.3%	65 112	11.6%	45 267	7.6%	27 903	7.2%	+ 1.3%
Lebanon	24 099	4.6%	24 007	5.3%	37 984	6.8%	50 287	8.4%	27 262	7.1%	- 11.3%
Israel	8 435	1.6%	9 378	2.1%	8 353	1.5%	18 862	3.1%	23 411	6.1%	+++
Ivory Coast	15 929	3.1%	21 619	4.8%	28 839	5.2%	35 767	6.0%	21 338	5.5%	+ 9.1%
Ghana	28 693	5.5%	40 878	9.0%	33 255	5.9%	37 389	6.2%	19 880	5.2%	- 12.4%
Bosnia-Herz.	14 893	2.9%	24 068	5.3%	34 104	6.1%	40 031	6.7%	19 256	5.0%	- 8.1%
Libya	10 665	2.1%	17 778	3.9%	14 280	2.6%	19 691	3.3%	18 455	4.8%	+ 81.4%
Switzerland	19 573	3.8%	26 347	5.8%	26 634	4.8%	26 038	4.3%	15 812	4.1%	- 3.5%
Algeria	17 323	3.3%	25 911	5.7%	18 499	3.3%	16 085	2.7%	13 682	3.5%	+ 21.2%
Norway	14 620	2.8%	10 222	2.3%	7 879	1.4%	19 129	3.2%	13 232	3.4%	- 5.6%
Vietnam	3 042	0.6%	3 175	0.7%	6 410	1.1%	11 627	1.9%	11 924	3.1%	+++
Philippines	2 028	0.4%	2 730	0.6%	11 839	2.1%	13 116	2.2%	10 256	2.7%	+ 54.0%
Egypt	1 305	0.3%	2 592	0.6%	2 763	0.5%	9 835	1.6%	9 539	2.5%	+ 156.0%
For.JRep.Mac	11 321	2.2%	10 577	2.3%	11 370	2.0%	12 562	2.1%	6 596	1.7%	- 7.1%
Russia	97 828	18.9%	72 281	16.0%	96 928	17.3%	13 643	2.3%	6 543	1.7%	+ 5.7%
Angola	8 258	1.6%	10 589	2.3%	14 587	2.6%	9 644	1.6%	6 088	1.6%	+ 6.8%
Other Destinations	129 605	25.0%	127 315	28.1%	146 892	26.3%	172 539	28.8%	104 420	27.1%	
Extra-EU	518 694		452 537		559 238		599 454		385 641		
% change			- 13%		+ 24%		+ 7%		+ 16.8%		



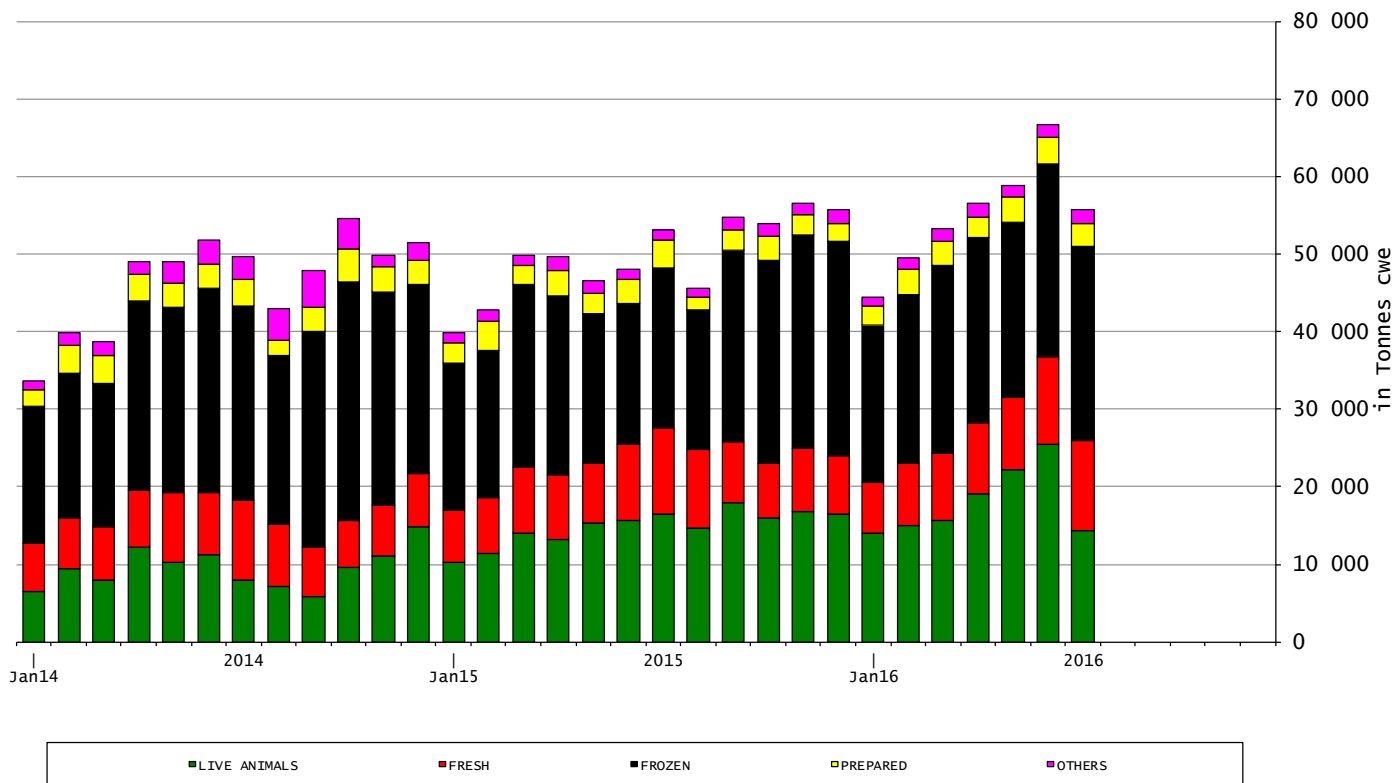


## EU exports of beef and live animals: Trade figures (COMEXT)





## EU-28 Exports of BEEF products

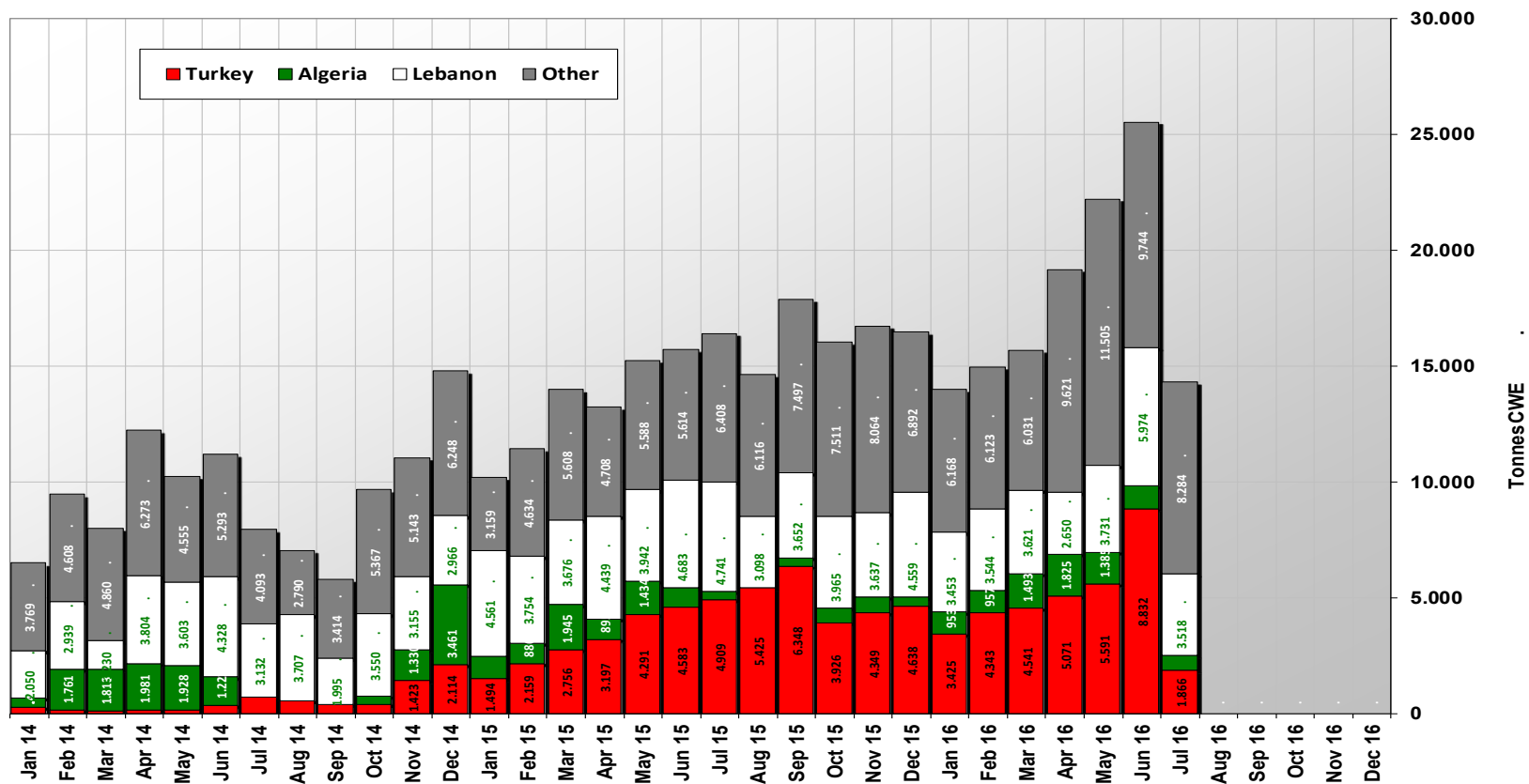




European  
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## EU-28 Exports of LIVE Bovine Animals

(Source COMEXT - Tonnes cwe)

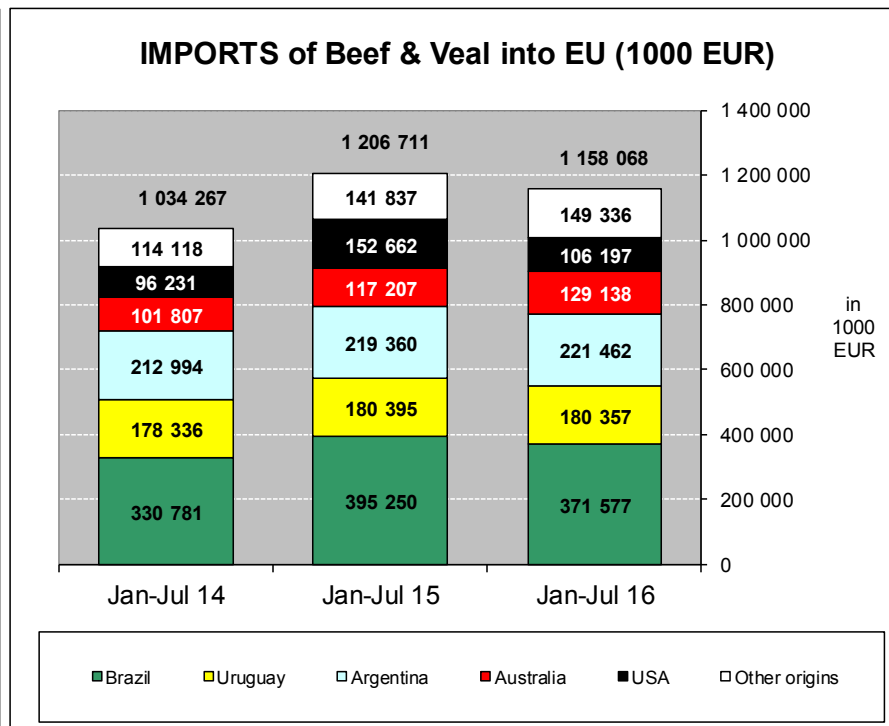
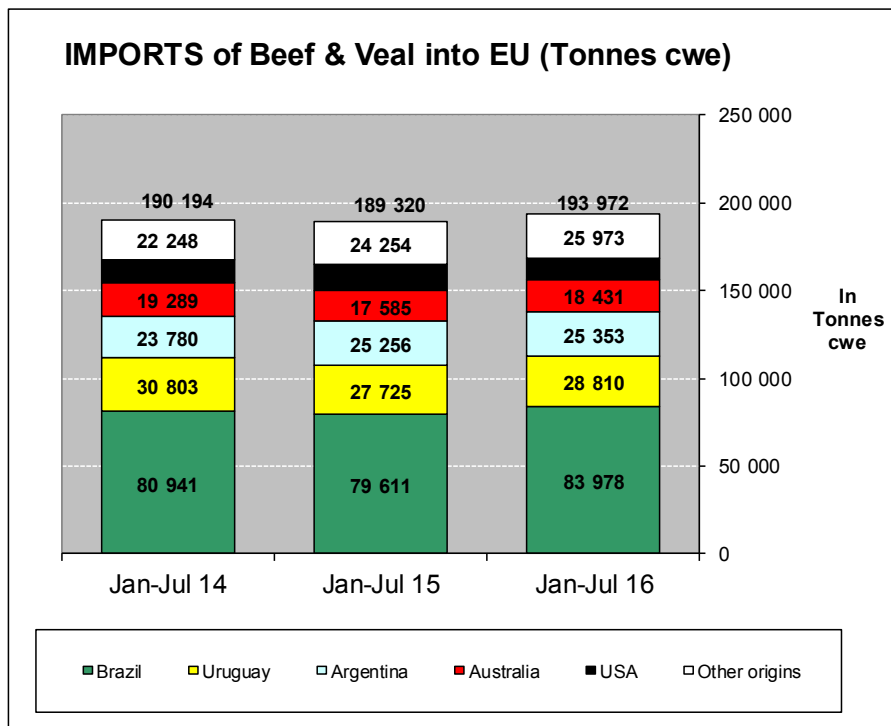




## EU imports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

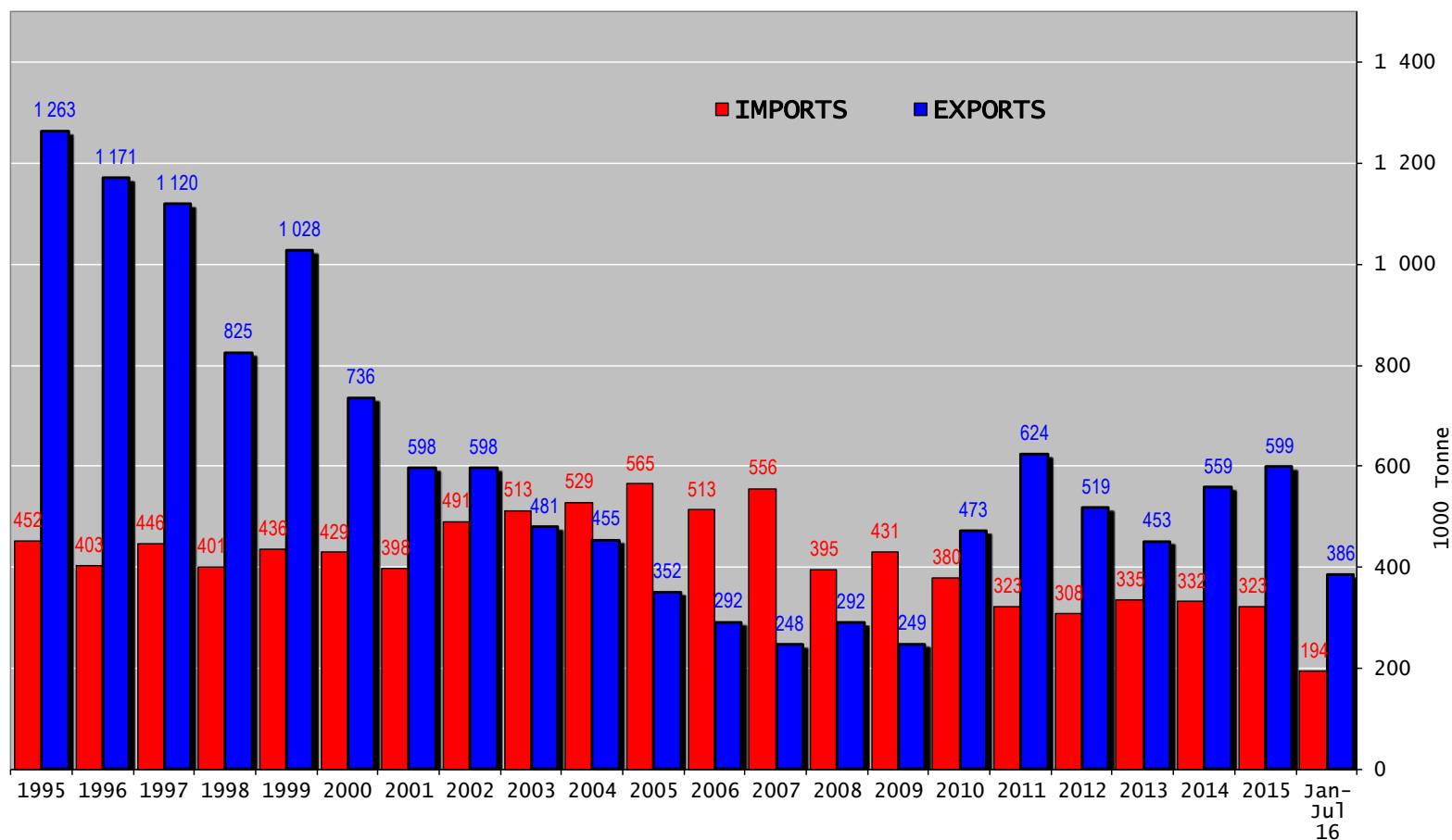
Origins	2012		2013		2014		2015		Jan-Jul 16		Compared to Jan-Jul 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	126 344	41.1%	145 435	43.5%	144 259	43.4%	136 705	42.4%	83 978	43.3%	+ 5.5%
Uruguay	51 996	16.9%	51 377	15.4%	49 043	14.8%	46 301	14.3%	28 810	14.9%	+ 3.9%
Argentina	51 693	16.8%	47 976	14.3%	42 074	12.7%	42 135	13.1%	25 353	13.1%	+ 0.4%
Australia	21 290	6.9%	28 074	8.4%	32 653	9.8%	30 879	9.6%	18 431	9.5%	+ 4.8%
USA	21 095	6.9%	22 297	6.7%	23 234	7.0%	24 075	7.5%	11 427	5.9%	- 23.3%
New Zealand	15 181	4.9%	13 827	4.1%	14 432	4.3%	11 369	3.5%	6 473	3.3%	- 11.5%
Namibia	8 848	2.9%	11 113	3.3%	9 994	3.0%	12 140	3.8%	5 897	3.0%	- 12.8%
Botswana	474	0.2%	6 280	1.9%	6 424	1.9%	9 258	2.9%	5 236	2.7%	- 3.0%
Paraguay	101	0.0%	0	0.0%	0	0.0%	1 915	0.6%	3 684	1.9%	+++
Switzerland	4 946	1.6%	4 284	1.3%	5 456	1.6%	5 089	1.6%	3 031	1.6%	+ 10.7%
Chile	1 711	0.6%	537	0.2%	875	0.3%	710	0.2%	345	0.2%	- 21.7%
Serbia	641	0.2%	619	0.2%	425	0.1%	439	0.1%	277	0.1%	+ 4.8%
Canada	825	0.3%	965	0.3%	780	0.2%	428	0.1%	189	0.1%	- 37.0%
Norway	159	0.1%	201	0.1%	347	0.1%	480	0.1%	171	0.1%	- 54.4%
Japan	0	0.0%	3	0.0%	100	0.0%	216	0.1%	165	0.1%	+ 26.6%
Hong Kong	10	0.0%	0	0.0%	0	0.0%	0	0.0%	125	0.1%	+++
Ukraine	0	0.0%	0	0.0%	570	0.2%	20	0.0%	108	0.1%	+++
Other Origins	2 392	0.8%	1 640	0.5%	1 695	0.5%	596	0.2%	273	0.1%	
Extra-EU	307 707		334 630		332 361		322 753		193 972		
% change			+ 9%		- 1%		- 3%		+ 2.5%		

## EU imports of beef and live animals (2): Trade figures (COMEXT)



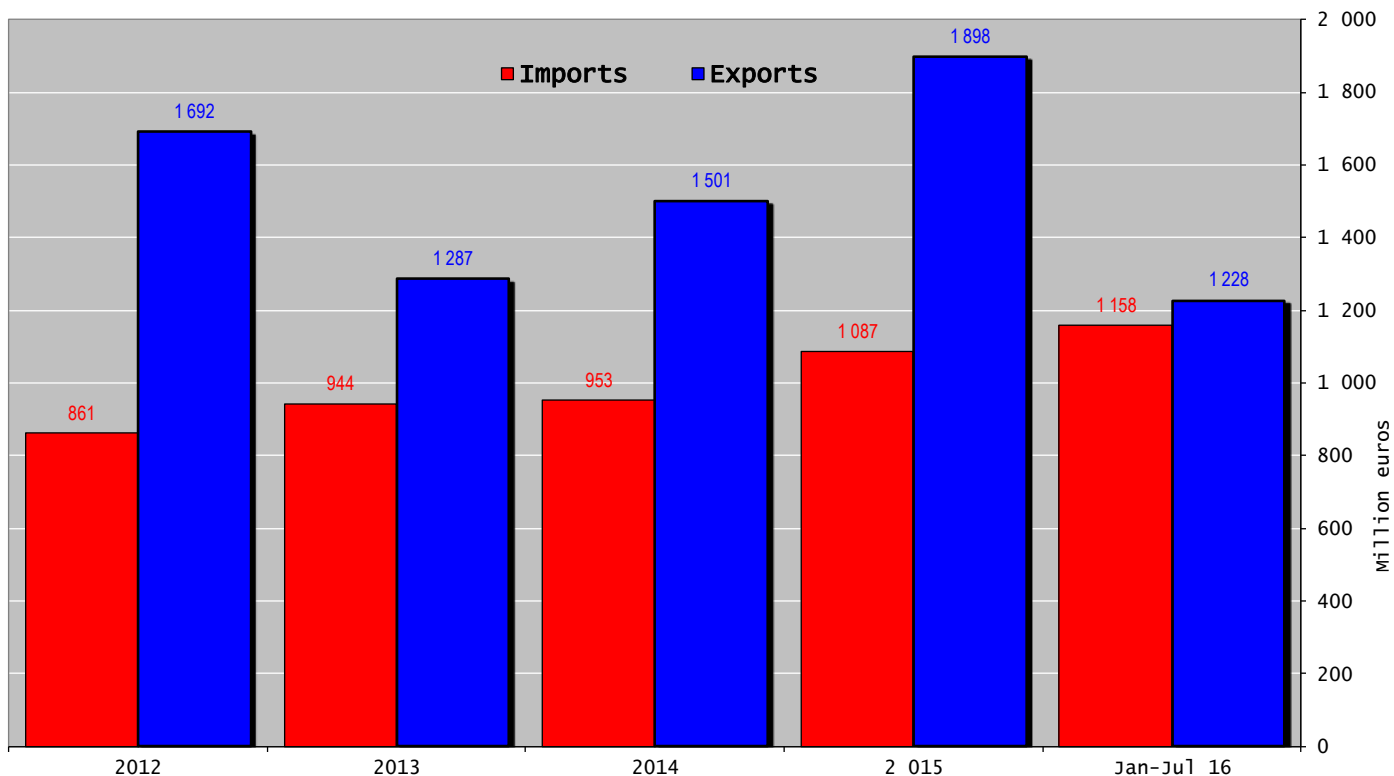


### Trade balance of beef and live animals





## Trade balance of beef and live animals



# High Quality Beef Import Quotas



## Hilton Quota

## Regulation (EU) N° 593/2013

	Quantity allocated (Tons)	2013/2014			2014/2015		2015/2016		2016/2017*	
		Use			Use		Use		Use	
09.4001 Australia	2 250									
09.4004 Argentina	200	15.71	7.86%	9.46	4.73%	12.21	6.11%	1.77	0.89%	
09.4450 Argentina	29 500	23 663.86	80.22%	22 867.03	77.52%	22 350.61	75.76%	4 341.78	14.72%	
09.4451 Australia	7 150	7 138.89	99.84%	6 815.93	95.33%	6 749.85	94.40%	1 117.58	15.63%	
09.4452 Uruguay	6 300	6 278.75	99.66%	6 280.98	99.70%	6 249.09	99.19%	1 676.30	26.61%	
09.4453 Brazil	10 000	4 078.92	40.79%	7 989.89	79.90%	9 289.17	92.89%	1 263.33	12.63%	
09.4454 New Zealand	1 300	1 299.61	99.97%	1 299.45	99.96%	1 299.95	100.00%	255.85	19.68%	
09.4002 Canada/US	11 500	431.80	3.75%	353.46	3.07%	292.16	2.54%	79.30	0.69%	
09.4455 Paraguay	1 000		0.00%	12.13	1.21%	915.63	91.56%	266.35	26.64%	
<b>Total Beef</b>	<b>66 750</b>	<b>42 891.83</b>	<b>64.26%</b>	<b>45 618.87</b>	<b>68.34%</b>	<b>47 146.46</b>	<b>70.63%</b>	<b>9 000.49</b>	<b>13.48%</b>	
<b>Total Buffalo</b>	<b>2 450</b>	<b>15.71</b>	<b>0.64%</b>	<b>9.46</b>	<b>0.39%</b>	<b>12.21</b>	<b>0.50%</b>	<b>1.77</b>	<b>0.07%</b>	
<b>Total</b>	<b>69 200</b>	<b>42 907.54</b>	<b>62.01%</b>	<b>45 628.33</b>	<b>65.94%</b>	<b>47 158.67</b>	<b>68.15%</b>	<b>9 002.26</b>	<b>13.01%</b>	

\* up to 31/08/2016



# High Quality Beef Import Quotas



European  
Commission

## Quota erga omnes

## Regulation (EU) No 481/2012

	2013-Q3	2013-Q4	2014-Q1	2014-Q2	TOTAL
Period 2013-2014	10 198 942	10 493 437	10 191 527	10 282 860	41 166 765
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	84.64%	87.08%	84.58%	85.33%	85.41%

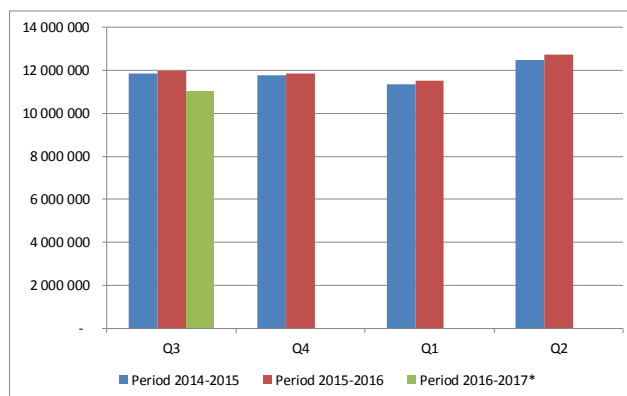
	2014-Q3	2014-Q4	2015-Q1	2015-Q2	TOTAL
Period 2014-2015	11 842 700	11 745 231	11 352 426	12 457 389	47 397 746
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	98.28%	97.47%	94.21%	103.38%	98.34%
Available after transfer	12 050 000 98.28%	12 257 300 95.82%	12 562 069 90.37%	13 259 644 93.95%	

	2015-Q3	2015-Q4	2016-Q1	2016-Q2	TOTAL
Period 2015-2016	11 965 843	11 851 187	11 505 332	12 736 406	48 058 768
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	99.30%	98.35%	95.48%	105.70%	99.71%
Available after transfer	12 050 000 99.30%	12 134 157 97.67%	12 332 969 93.29%	12 877 638 98.90%	

	2016-Q3	2016-Q4	2017-Q1	2017-Q2	TOTAL
Period 2016-2017*	11 002 484	-	-	-	11 002 484
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	91.31%	0.00%	0.00%	0.00%	22.83%
Available after transfer	12 050 000 91.31%	13 097 516 0.00%	25 147 516 0.00%	37 197 516 0.00%	

\* Until 15/09/2016

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# Forecast Summary



European  
Commission

	2014	2015	2016	2017
<b>EU.15 PRODUCTION</b> ( 1000T )	- 0.19% 6 636	+ 2.68% 6 813	+ 3.35% 7 042	+ 1.03% 7 114
<b>EU.15 CONSUMPTION</b> ( 1000T )	+ 0.78% 6 916	+ 1.75% 7 037	+ 0.11% 7 044	+ 0.23% 7 060
<b>BALANCE</b>	- 280	- 223	- 2	53
<b>EU.13 PRODUCTION</b> ( 1000T )	+ 12.11% 691	+ 12.43% 777	+ 6.07% 824	+ 3.07% 849
<b>EU.13 CONSUMPTION</b> ( 1000T )	- 0.38% 390	+ 1.15% 394	- 3.02% 382	+ 0.39% 384
<b>BALANCE</b>	301	383	442	466
<b>EU.28 PRODUCTION</b> ( 1000T )	+ 0.86% 7 327	+ 3.60% 7 590	+ 3.63% 7 866	+ 1.24% 7 963
<b>EU.28 CONSUMPTION</b> ( 1000T )	+ 0.72% 7 305	+ 1.72% 7 431	- 0.06% 7 426	+ 0.24% 7 444
<b>BALANCE</b>	21	160	440	519
<b>EU - CARCASS PRICES</b>	2014	2015	2016	2017
<b>ADULT MALE BOVINES</b> ( €/100 kg )	- 5.8% 373.6	+ 3.44% 386.4	- 4.16% 370.4	+ 0.31% 371.5
<b>COWS</b> ( €/100 kg )	- 8.4% 287.1	- 0.70% 285.1	- 4.50% 272.3	- 0.69% 270.4

Sources : EStat New Cronos, Member States

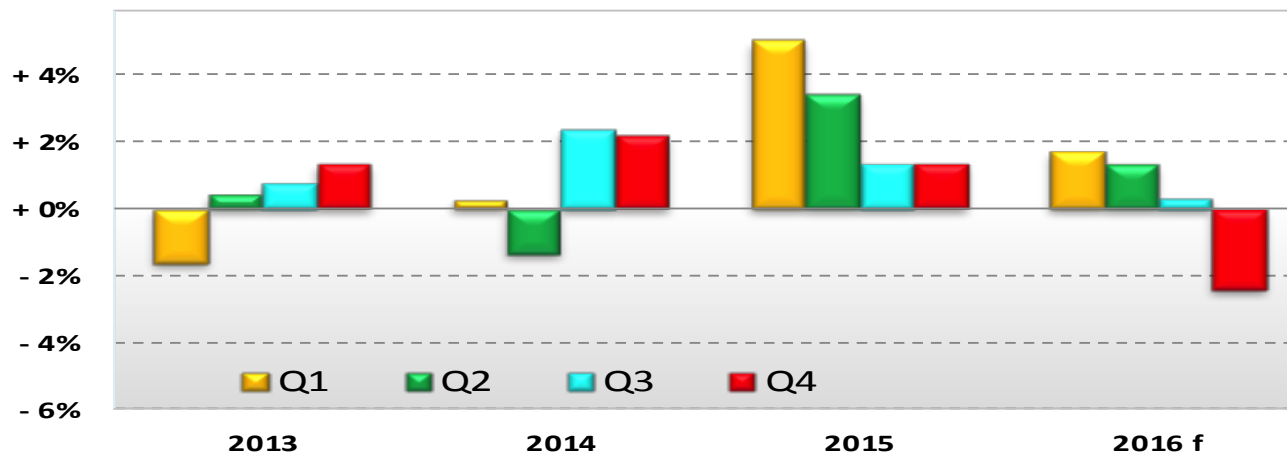
## En resumen...

- *La producción sigue progresando (efecto "leche")*
- *Presión creciente sobre los precios internos*
- *Mayor fragilidad del sub-sector vacuno de carne*
- *Buen comportamiento de las exportaciones, pero con una capacidad limitada de crecimiento*
- *El mercado UE sigue siendo muy atractivo para los cortes de alto valor*





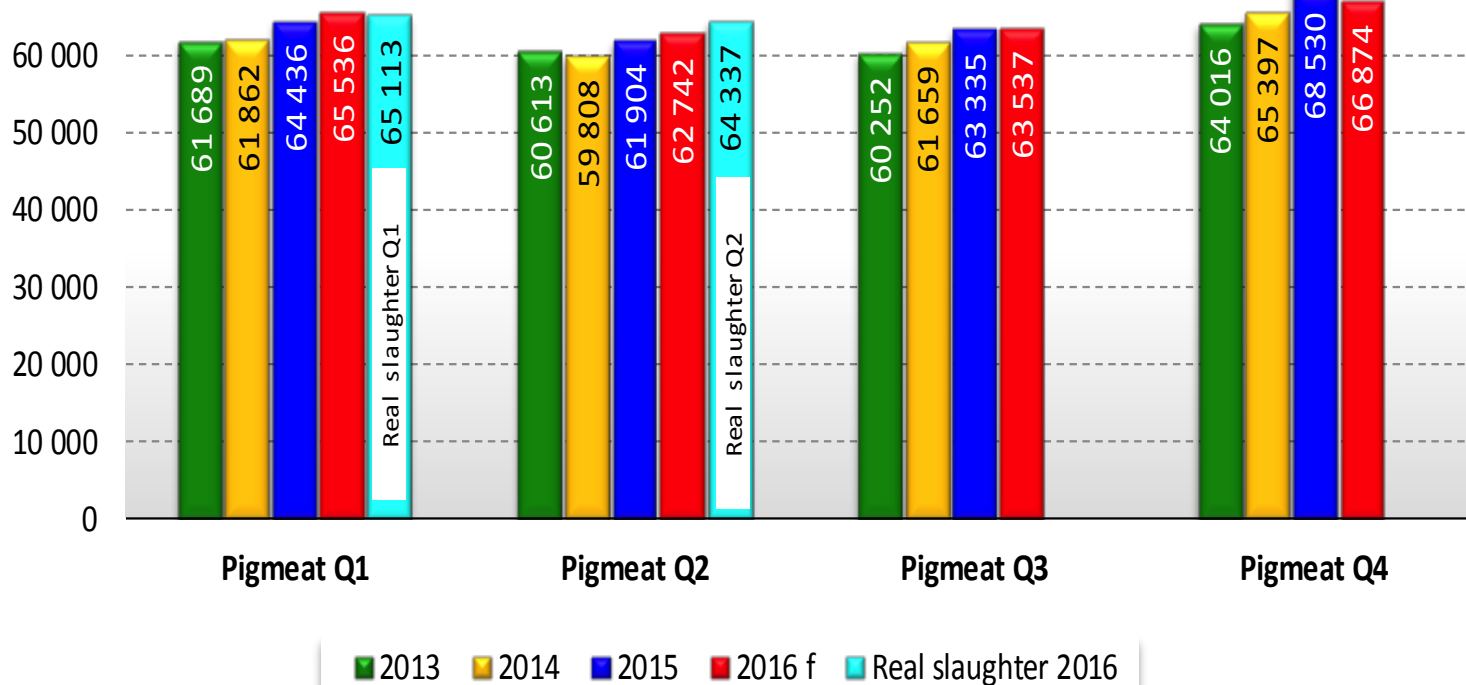
**Change in EU pigmeat slaughter (2016 forecast based on GIP and experts estimations)**



	2013	2014	2015	2016 f	Real slaughter 2016
Q1	- 1.6%	+ 0.3%	+ 5.0%	<b>+ 1.7%</b>	<b>+ 0.1%</b>
Q2	+ 0.4%	- 1.3%	+ 3.4%	<b>+ 1.4%</b>	<b>+ 4.1%</b>
Q3	+ 0.8%	+ 2.3%	+ 1.3%	<b>+ 0.3%</b>	
Q4	+ 1.3%	+ 2.2%	+ 1.3%	<b>- 2.4%</b>	
<b>EU_28</b>	<b>+ 0.2%</b>	<b>+ 0.9%</b>	<b>+ 2.7%</b>	<b>+ 0.2%</b>	

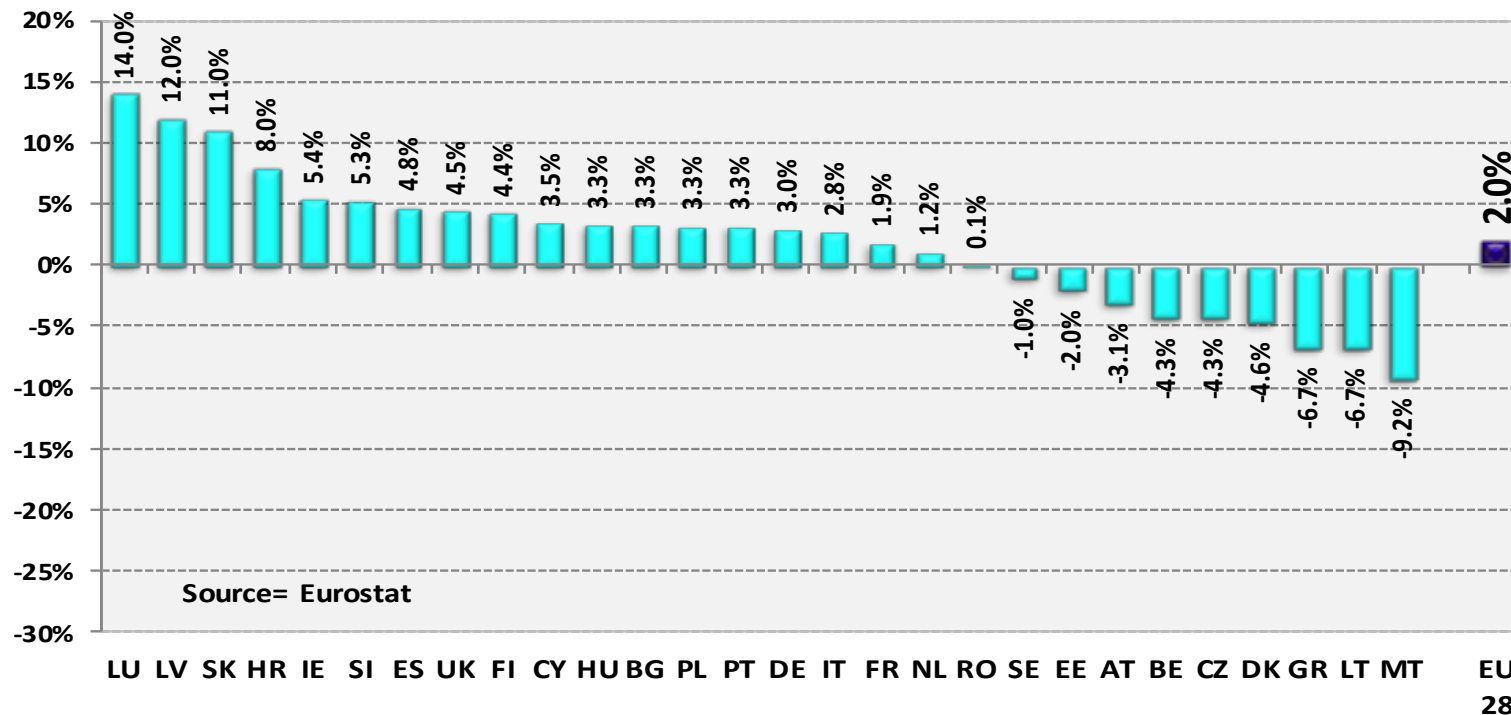


**EU pigmeat slaughter (2016 forecast based on GIP and experts estimations)**  
('000 heads)



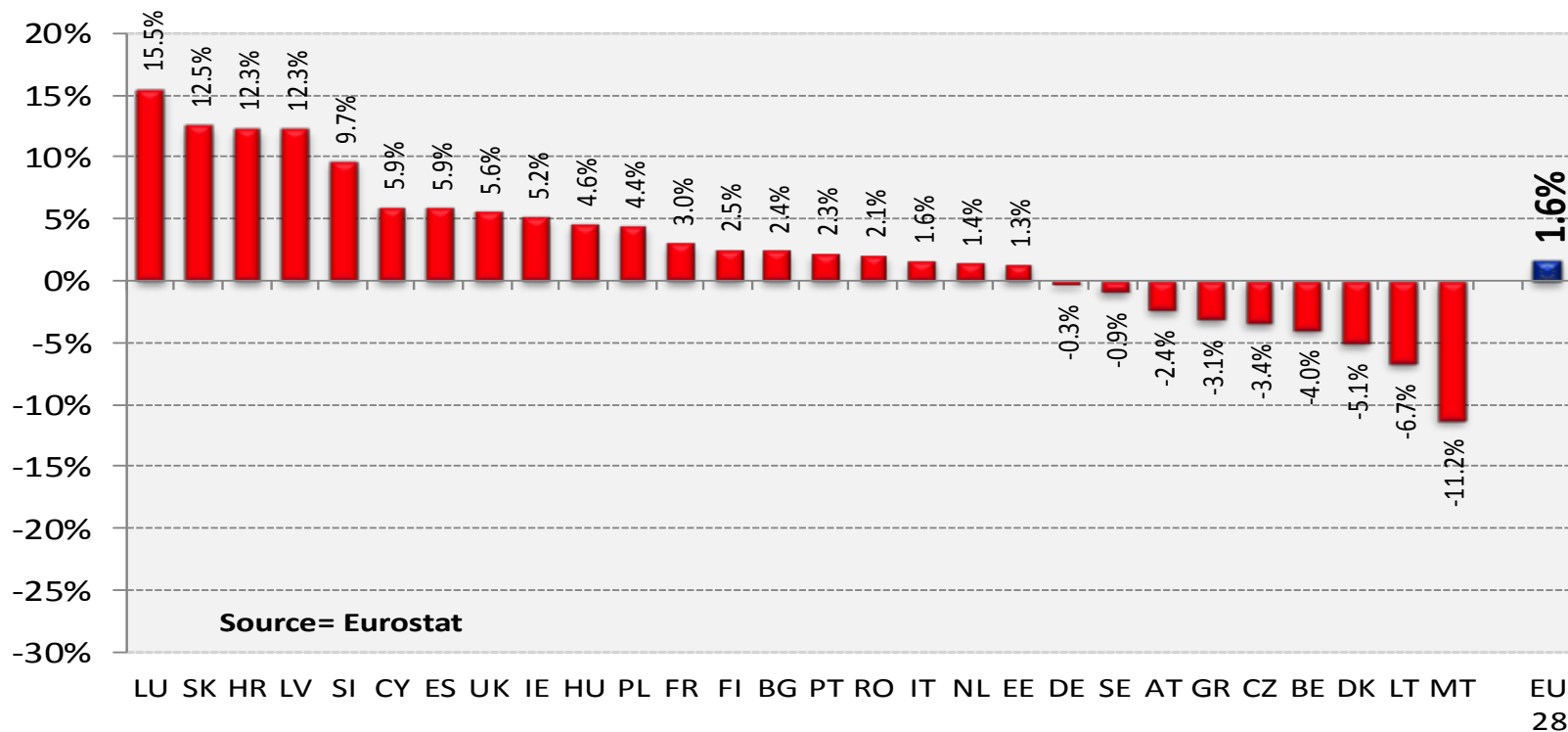


## Change in Pig Slaughter ('000 heads) 2016/2015 (up to Jun)





## Change in Pig Slaughter ('000 tonnes) 2016/2015 (up to Jun)





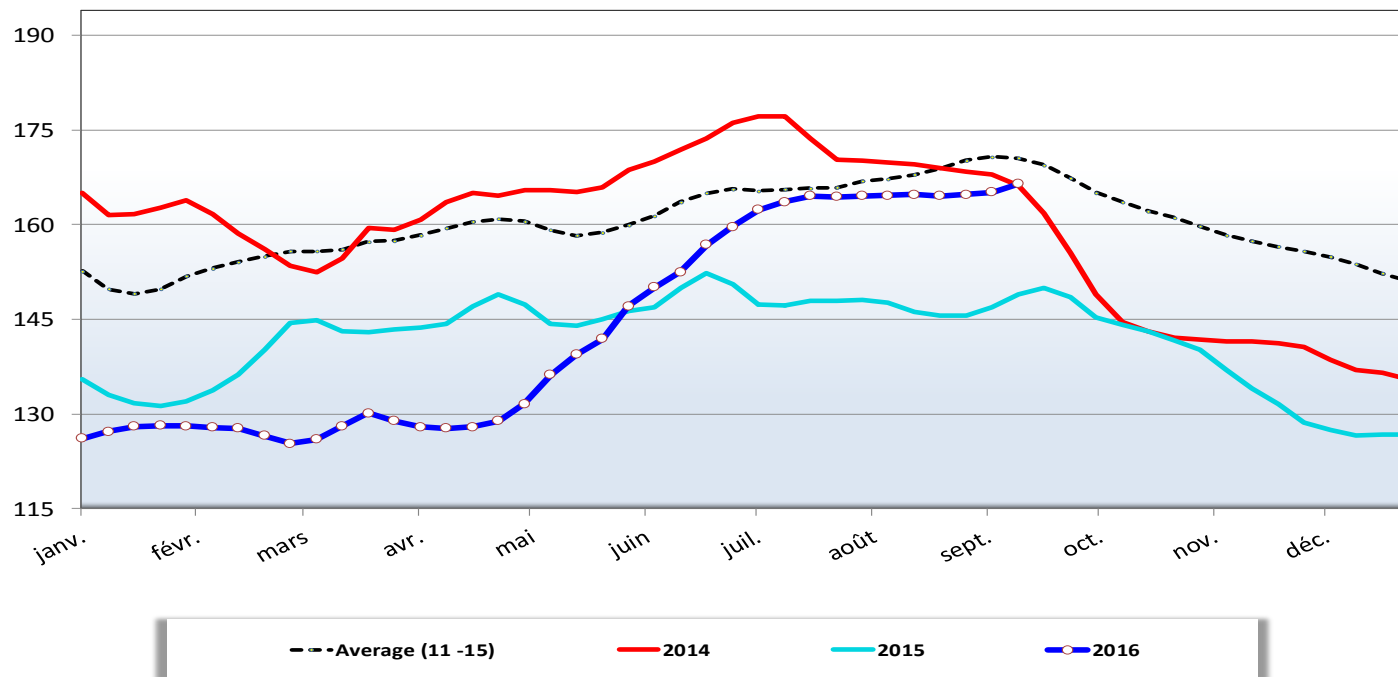
# PRICES CARCASSES



# EU EVOLUTION AVERAGE CLASSES S & E

EU evolution of the EU pig carcass prices  
(€/ 100kg)

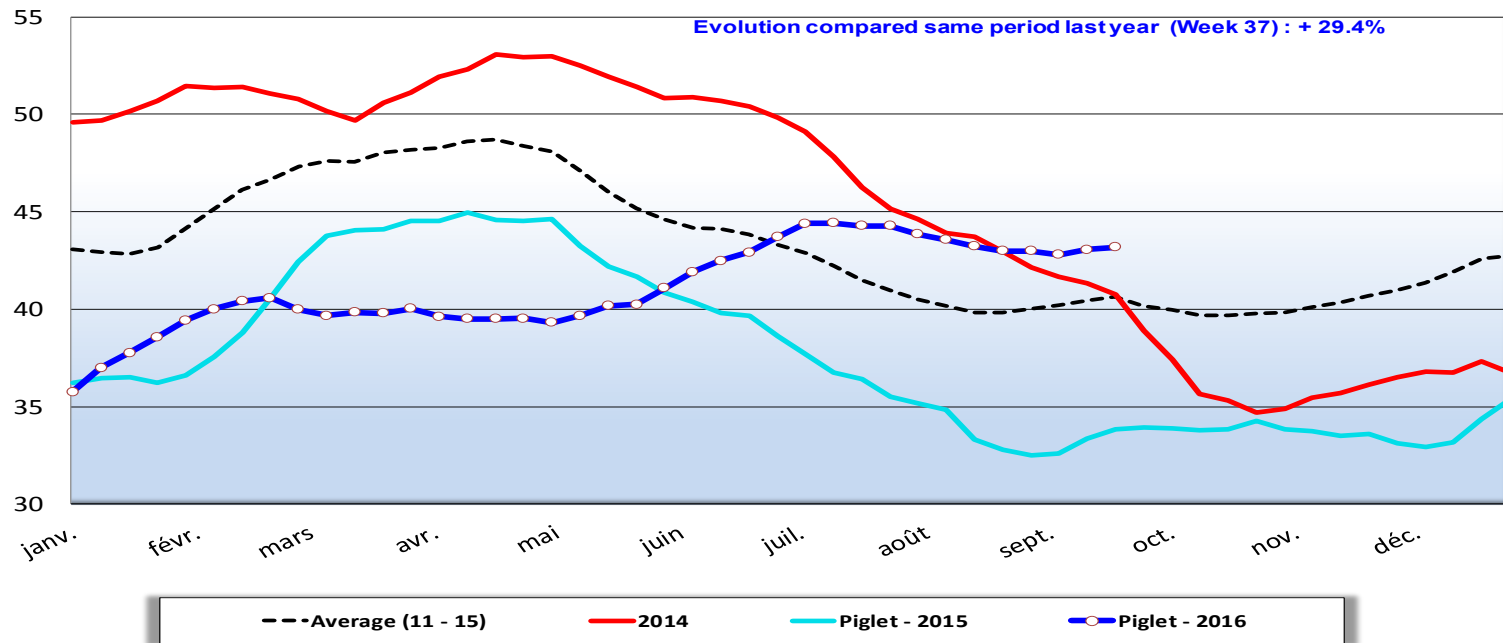
Latest price (Week 37) : 166 EUR/100 kg





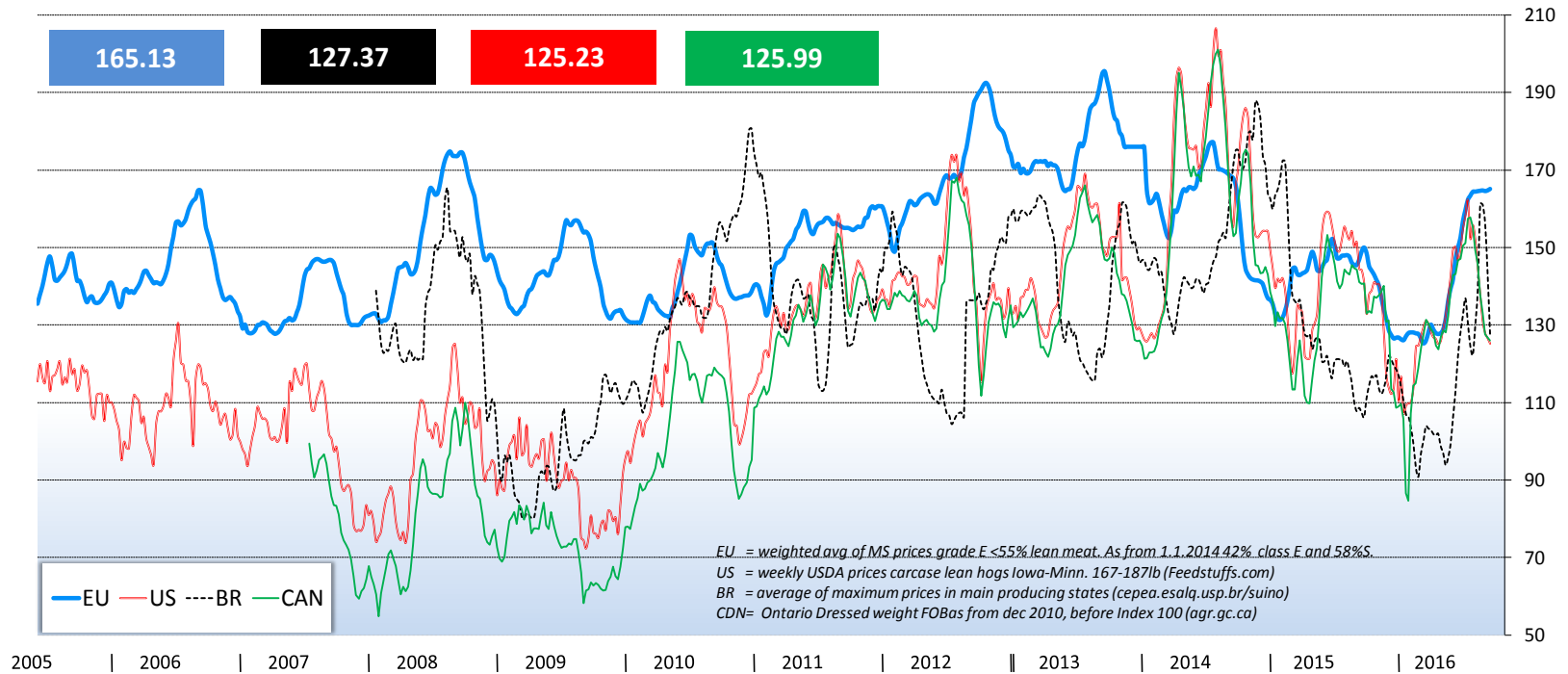
## EU evolution of the EU average piglet prices (€/head)

**Latest price (Week 37) : 43.18 EUR/100 kg**





## Weekly average Pig prices 2005 - 2016 in Euro/ 100kg carcase (EU, Brazil, Canada and USA)

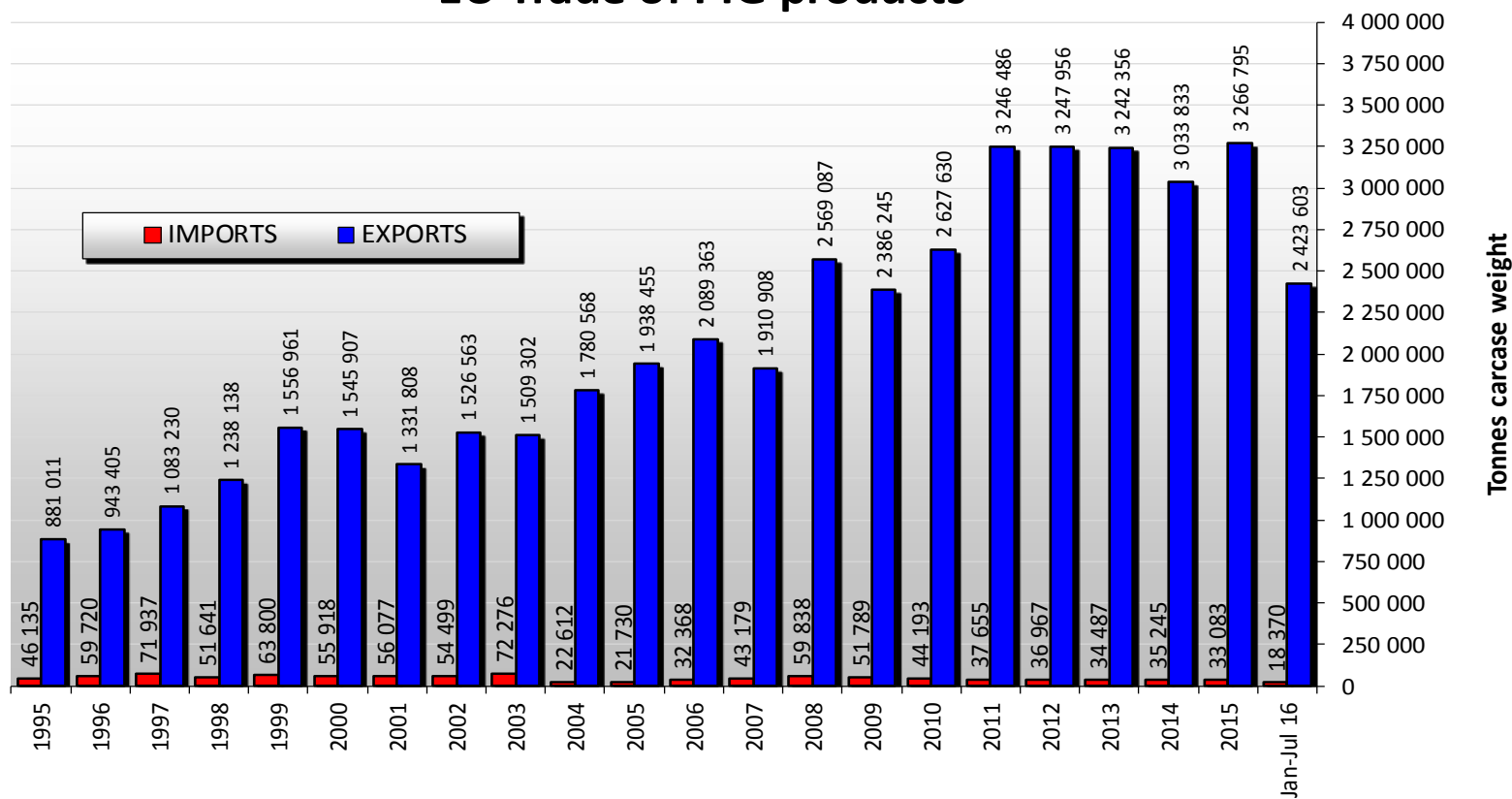




European Commission

## EU trade of PIG products

### EU Trade of PIG products





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

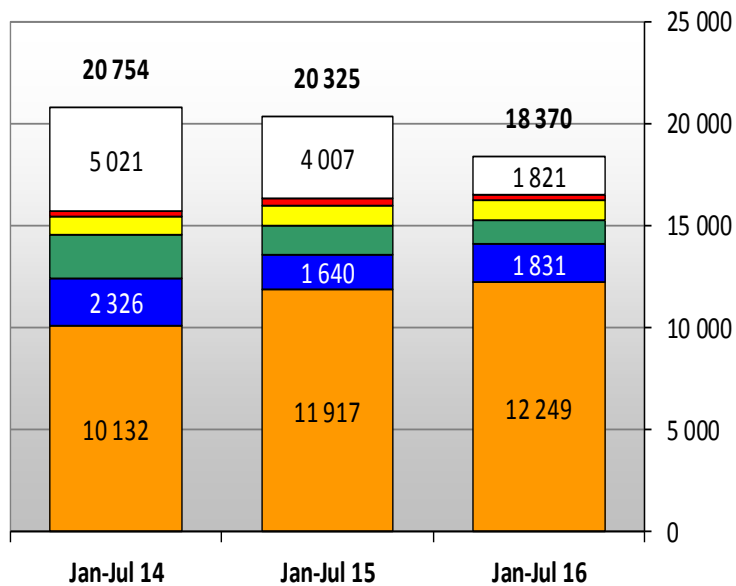
### IMPORT

	2012		2013		2014		2015		Jan-Jul 16		Compared to Jan-Jul 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Switzerland	18 731	51%	17 399	50%	18 207	52%	20 225	61%	12 249	67%	3%
Chile	8 756	24%	6 432	19%	3 416	10%	2 896	9%	1 831	10%	12%
Norway	2 045	6%	2 202	6%	3 192	9%	2 314	7%	1 154	6%	-22%
USA	1 264	3%	1 548	4%	1 498	4%	1 769	5%	979	5%	4%
Other	6 171	17%	6 906	20%	8 932	25%	5 879	18%	2 157	12%	
Extra-EU	36 967		34 487		35 245		33 083		18 370		
% change			- 7%		+ 2%		- 6%		- 9.6%		



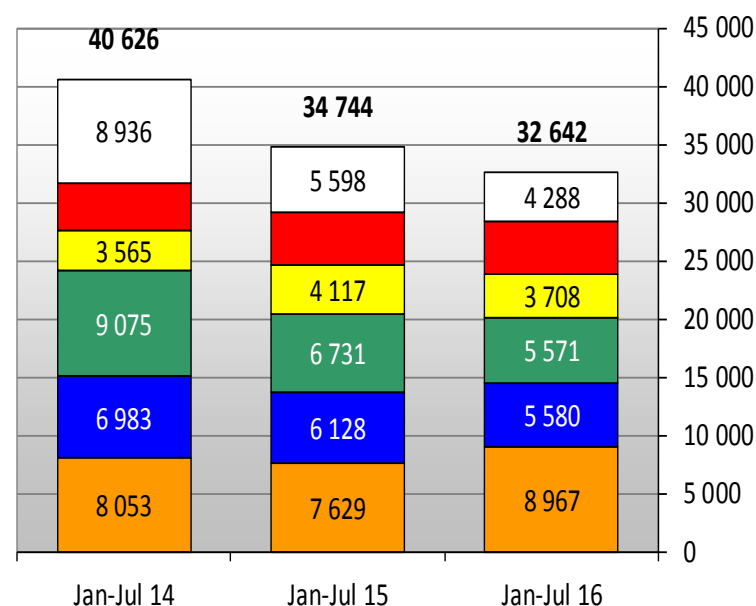
## EU imports of selected PIG products Trade figures (COMEXT – tonnes carcass weight)

**IMPORTS of PIG Meat into EU-28 (Tonnes c. weight)**



Switzerland Chile Norway USA Thailand Other origins

**IMPORTS of PIG Meat into EU-28 (1000 EUR)**



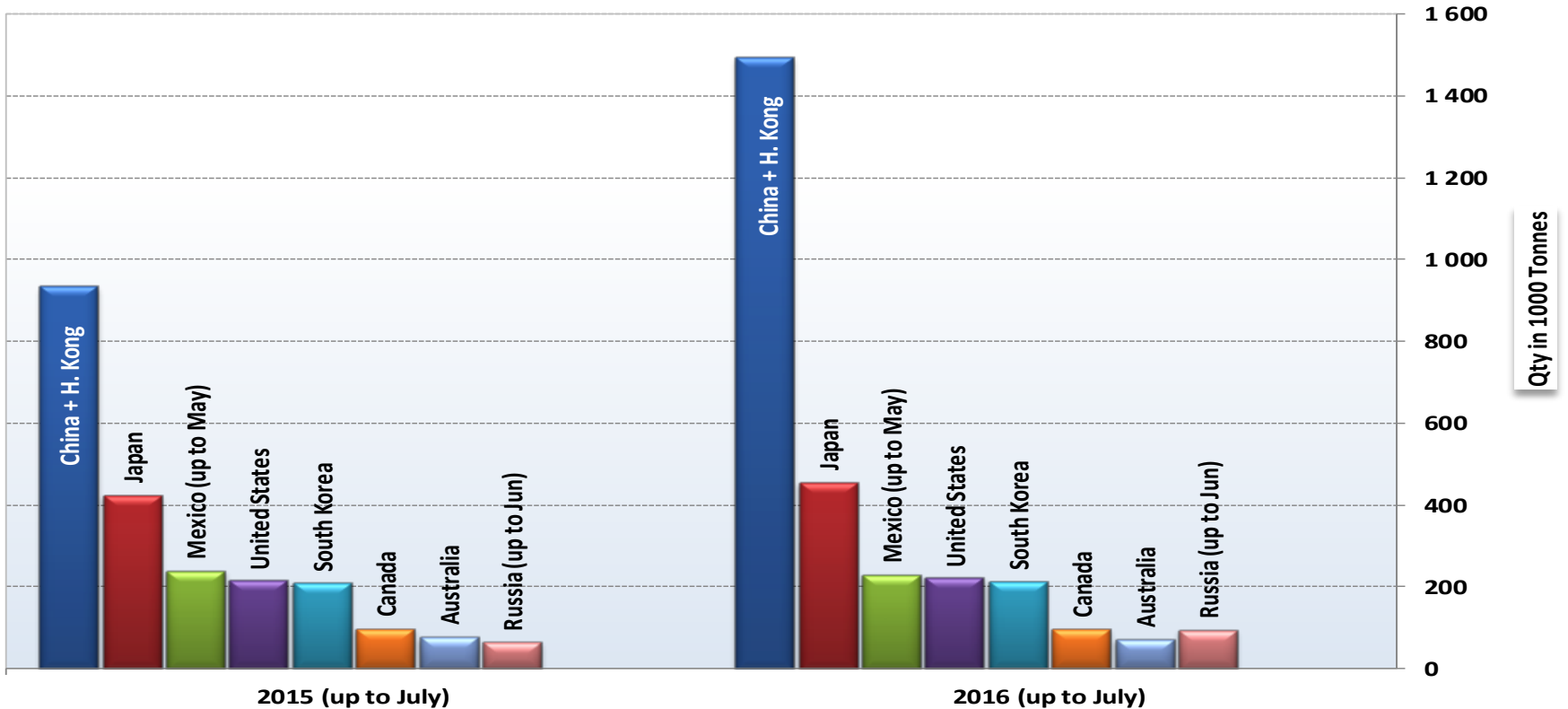
Switzerland Chile Norway USA Thailand Other origins



## Main Importers of PIG Products (up to July)

Source : GTA & Eurostat

(excl. live animals)





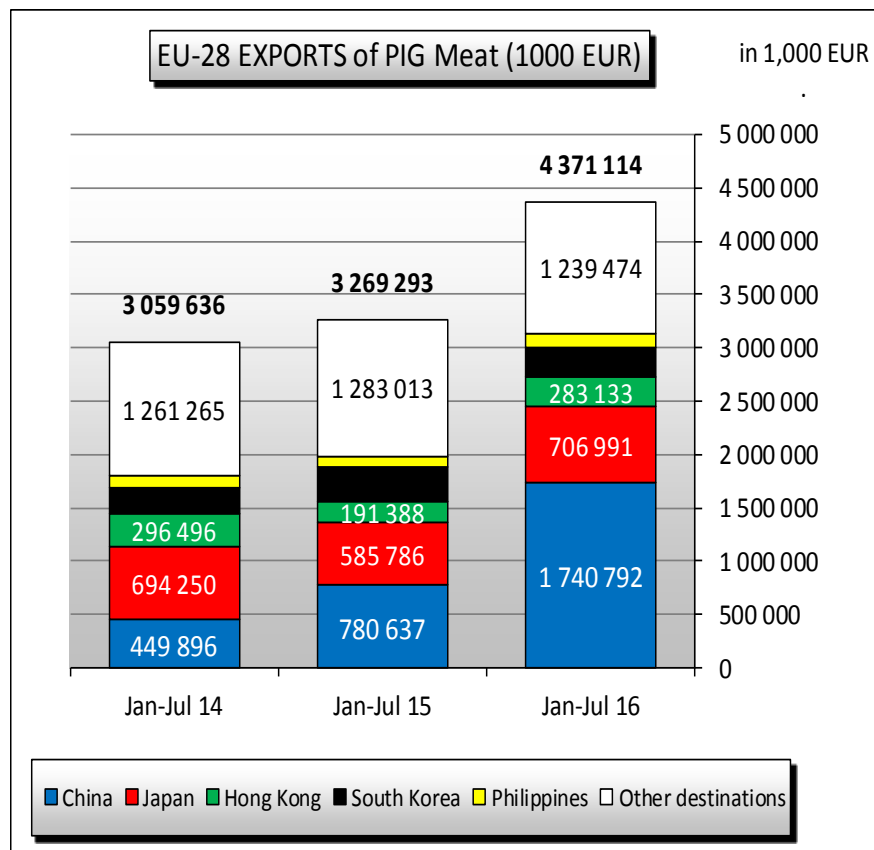
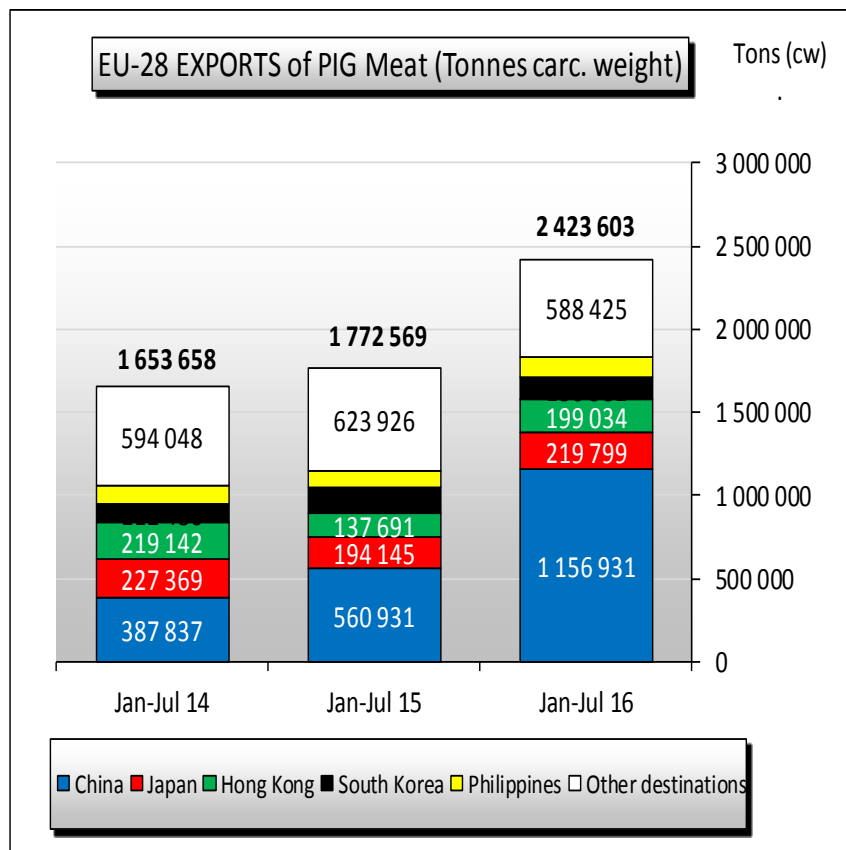
## EU exports of selected PIG products: Trade figures (COMEXT – tonnes carcass weight)

	2012		2013		2014		2015		Jan-Jul 16		Compared to Jan-Jul 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
China	589 805	18.2%	668 386	20.6%	717 033	23.6%	1 110 562	34.0%	1 156 931	47.7%	+ 106%
Japan	259 997	8.0%	261 324	8.1%	347 721	11.5%	330 133	10.1%	219 799	9.1%	+ 13%
Hong Kong	381 703	11.8%	388 015	12.0%	408 183	13.5%	291 140	8.9%	199 034	8.2%	+ 45%
South Korea	145 950	4.5%	108 482	3.3%	227 825	7.5%	232 377	7.1%	130 582	5.4%	- 15%
Philippines	74 140	2.3%	102 348	3.2%	202 522	6.7%	189 361	5.8%	128 831	5.3%	+ 26%
USA	65 116	2.0%	64 710	2.0%	90 985	3.0%	101 991	3.1%	73 912	3.0%	+ 31%
Australia	54 262	1.7%	51 467	1.6%	73 156	2.4%	85 172	2.6%	56 239	2.3%	- 6%
Ukraine	167 129	5.1%	125 540	3.9%	106 780	3.5%	96 815	3.0%	43 384	1.8%	- 7%
Vietnam	1 369	0.0%	3 269	0.1%	16 056	0.5%	38 227	1.2%	34 033	1.4%	+ 134%
Taiwan	15 681	0.5%	11 540	0.4%	52 970	1.7%	53 687	1.6%	28 943	1.2%	- 9%
Ivory Coast	26 559	0.8%	35 107	1.1%	39 773	1.3%	49 874	1.5%	21 486	0.9%	- 24%
Serbia	21 679	0.7%	28 336	0.9%	62 905	2.1%	47 538	1.5%	21 074	0.9%	- 20%
Other	1 444 563	44.5%	1 393 832	14.5%	687 924	13.7%	639 918	14.4%	309 353	12.8%	
Extra-EU	3 247 956		3 242 356		3 033 833		3 266 795		2 423 603		
% change			- 0%		- 6%		+ 8%		+ 36.7%		

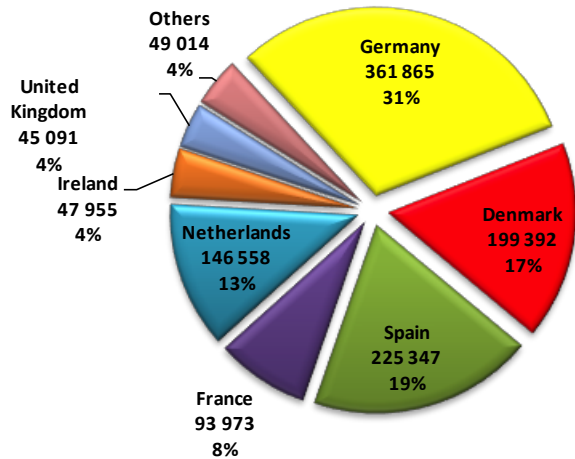




## EU exports of selected PIG products Trade figures (COMEXT – tonnes carcass weight)

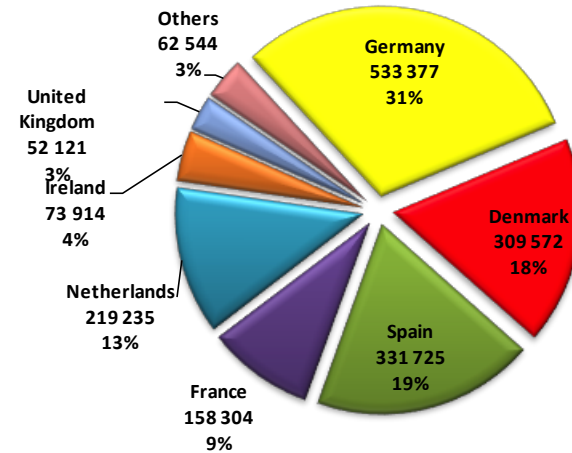


**Main EU MS exporting pigmeat to China  
(In tonnes CW)**



■ Germany    ■ Denmark    ■ Spain    ■ France  
■ Netherlands    ■ Ireland    ■ United Kingdom    ■ Others

**Main EU MS exporting pigmeat to China  
(In '000 €)**



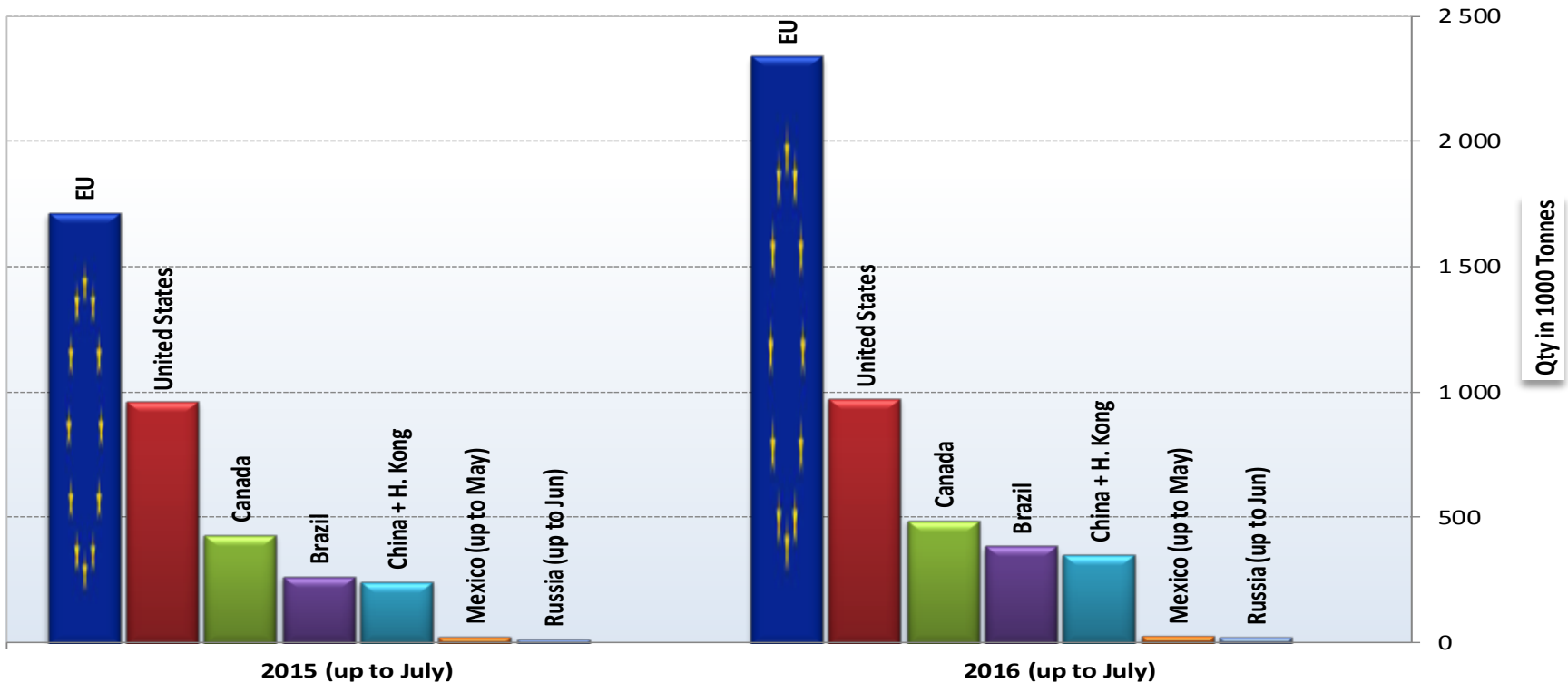
■ Germany    ■ Denmark    ■ Spain    ■ France  
■ Netherlands    ■ Ireland    ■ United Kingdom    ■ Others



## Main Exporters of PIG Products (up to July)

Source : GTA & Eurostat

(excl. live animals)



## En resumen...

- Después de un proceso de ajuste de 2 años, el mercado parece haber encontrado el equilibrio
- Extraordinario comportamiento de las exportaciones, a pesar de no ser el origen más competitivo (especialización, servicio, logística, innovación, calidad...)
- Las cuestiones sanitarias siguen siendo una variable fundamental del mercado.

## Instrumentos de gestión y transparencia

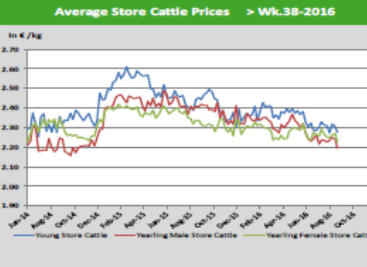
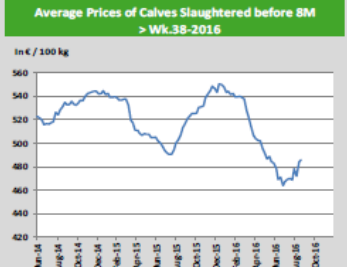
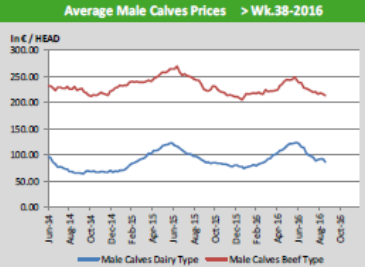
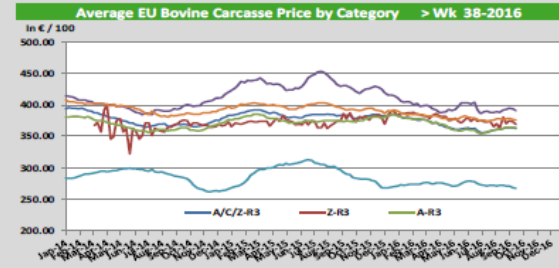
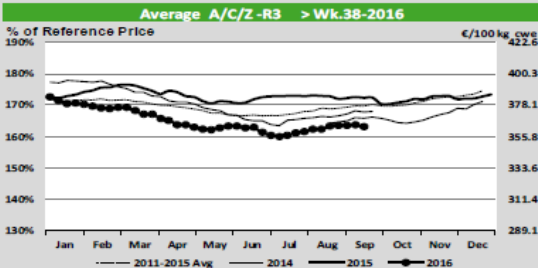
- *Intervención*
- *Almacenamiento privado*
- *Medidas excepcionales...*
  
- *Los tableros de bordo y el observatorio del mercado de la carne*

Prices

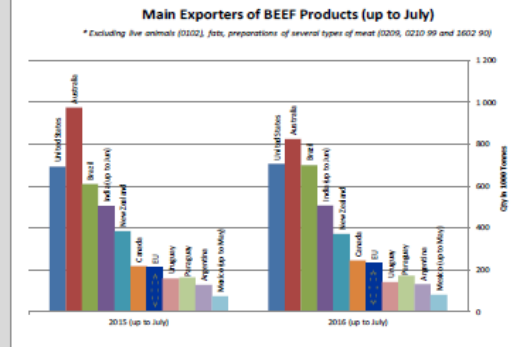
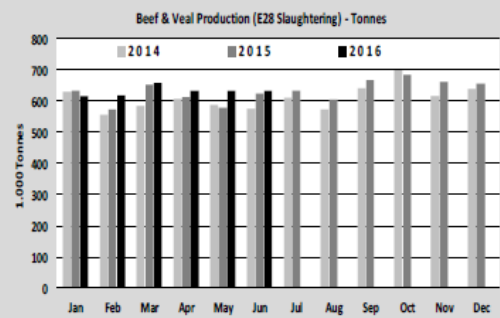
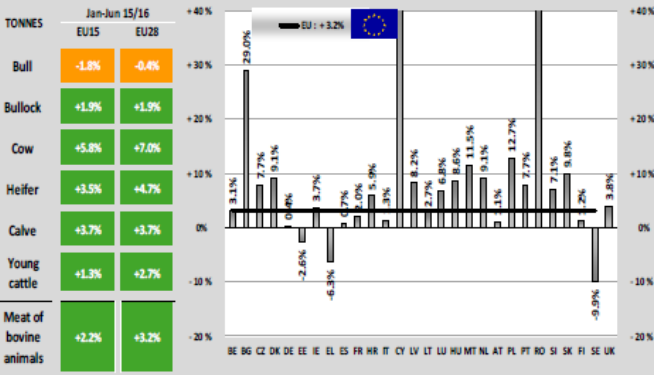
Carcasse

Live Animals

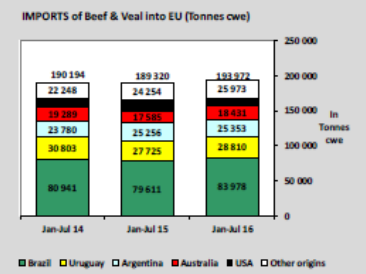
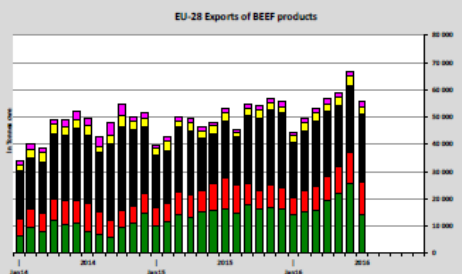
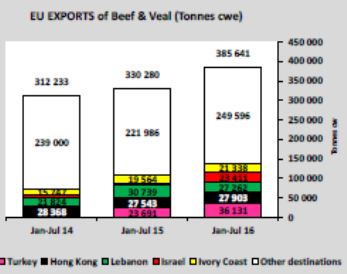
EU Prices week	38	Evolution since last week	Evolution since last month	Evolution since last year
Average A/C/Z-R3	363.0	-0.3%	-0.0%	-5.3%
Young Bovines (Z)	369.6	-0.8%	-2.8%	-0.8%
Young Bulls (A)	359.6	-0.2%	-0.0%	-0.9%
Steers (C)	397.0	-0.7%	-0.1%	-10.9%
Cows (D)	267.1	-0.5%	-1.8%	-8.0%
Heifers (E)	375.6	-0.3%	-0.4%	-4.3%
Male Calves Dairy Type	85.64	-6.4%	-3.5%	-9.5%
Male Calves Beef Type	213.7	-1.1%	-3.3%	-1.1%
Young Store Cattle	2.28	-1.2%	-1.4%	-6.8%
Yearling Male Store Cattle	2.20	-2.0%	-1.4%	-8.9%
Yearling Female Store Cattle	2.23	-1.9%	-1.2%	-4.8%
Calves slaughtered <8M	485.8	+0.4%	+3.7%	-4.2%



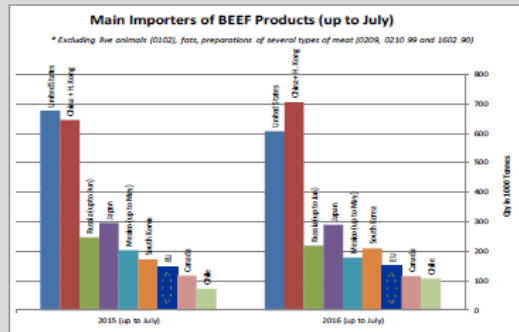
Production



Trade



World Trade



EU Prices

World Quotations

EU Production

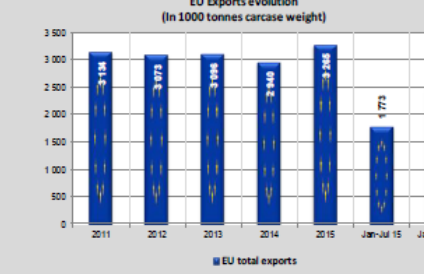
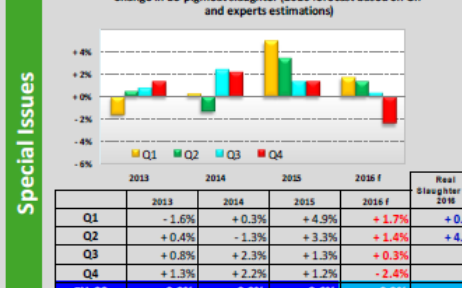
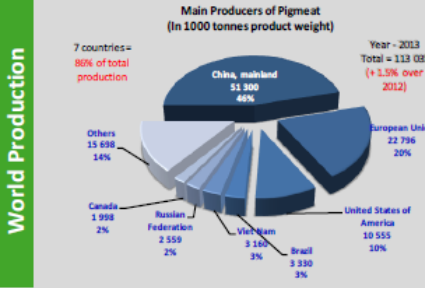
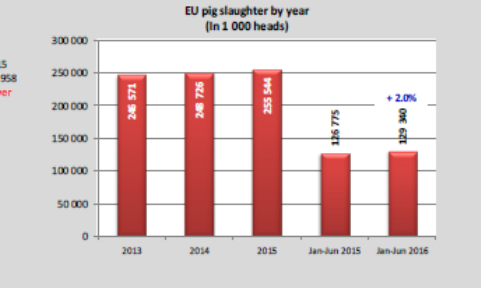
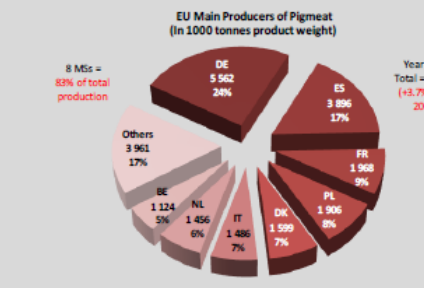
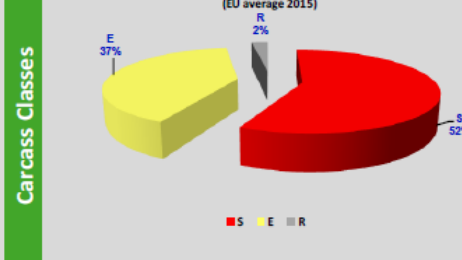
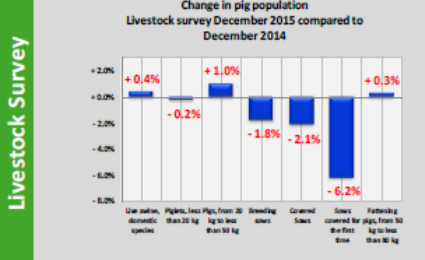
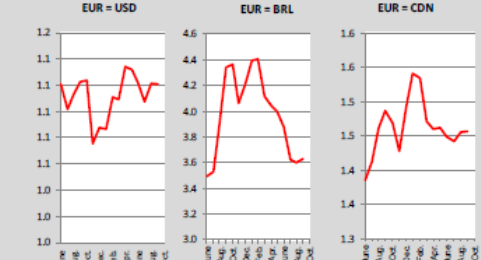
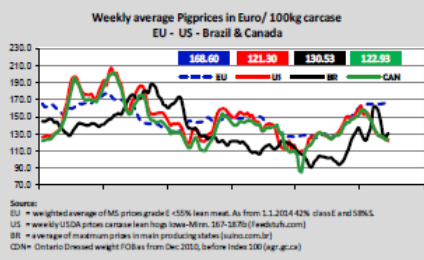
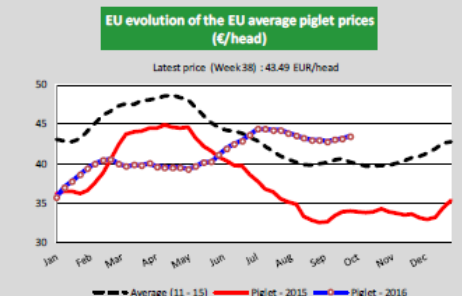
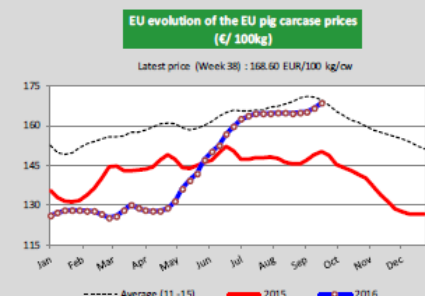
EU Trade

**EU Prices** **38**

Evolution since last week    Evolution since last month    Evolution since last year

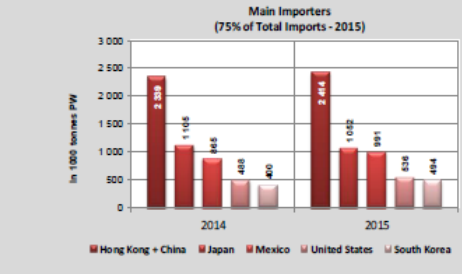
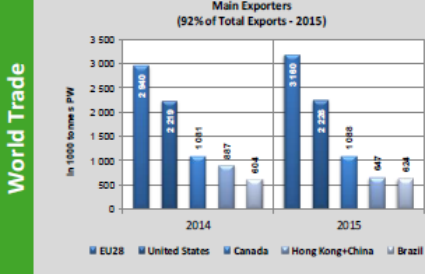
Average (S-E)	<b>168.60</b>	+1.3%	+2.4%	+12.4%
Class S	<b>169.02</b>	+1.1%	+2.1%	+12.0%
Class E	<b>167.94</b>	+1.5%	+3.0%	+13.0%
Piglet	<b>43.49</b>	+0.7%	+1.1%	+28.6%

€/100 kg carcass weight    €/head



**EU-28 Exports (Top destinations in 2015/16)**

Period:	PIGMEAT (Tonnes carcass weight)		
	Jan-Jul 15	Jan-Jul 16	2016 over 2015
Extra-EU	1 772 569	2 423 603	+36.7%
China	560 931	1 156 931	+++
Japan	194 145	219 799	+13.2%
Hong Kong	137 691	199 034	+44.6%
South Korea	153 404	130 582	-14.9%
Philippines	102 473	128 831	+25.7%
USA	56 218	73 912	+31.5%
Others	567 708	514 513	-9.4%





# AGRICULTURE AND RURAL DEVELOPMENT

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## Market-observatory

### EU Meat Market Observatory

The aim of the Meat Market Observatory is to provide the EU beef & veal and pigmeat sector with more transparency by means of disseminating market data and short-term analysis in a timely manner. In addition to the website, which is updated regularly, the Observatory has an Expert Group which meets at least 3 times a year. Summaries of these Expert Group meetings are published below under REPORTS.

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- > [Statistics](#)
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