GREX CMO Animal products 21/09/2023
Market Situation for Sheep & Goat Meats
Production
Sheep slaughtering for EU
2023/2022 (up to June)

In '000 tonnes carcass weight

ES  57.4
RO  49.3
FR  40.6
IE  34.3
EL  27.0
IT  15.2
DE  14.9
NL  9.8
PT  6.7
AT  3.7
BG  3.4
Others  17.6

EU - 3.5%

-5.4% -10.4% -5.4%
6.8% 1.5% 4.5% 2.4%
28.6% 19.0% -17.4%

Tonnes 2023  Change 2023/2022
Goat slaughtering for EU
2023/2022 (up to June)

In ‘000 tonnes carcase weight

EL  RO  ES  FR  NL  IT  CY  PT  AT  BG  Others

-6.1% -0.1% -17.5% -2.6% -5.0% 1.0% 20.0% -57.4%

EU - 7.6%

Tonnes 2023: 10.07 8.76 4.70 3.76 1.72 1.05 0.97 0.56 0.48 0.42 0.57

Change 2023/2022: -7.6%
Prices
Evolution of EU lamb prices

- Heavy lamb EU
- Light lamb EU

<table>
<thead>
<tr>
<th>Year</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price (€uro / 100kg/CW)</td>
<td>500</td>
<td>800</td>
<td>750</td>
</tr>
</tbody>
</table>
Evolution of EU average heavy lamb prices

Heavy lambs prices of August 2023 compared to July 2023:

- BE: -5.9%
- DE: -4.2%
- IE: -10.0%
- ES: -0.5%
- FR: -2.0%
- HR: +0.2%
- IT: +1.4%
- CY: -1.8%
- LV: +0.9%
- LT: -6.9%
- HU: +2.0%
- NL: -3.1%
- AT: -0.1%
- PL: -0.2%
- PT: +4.3%
- RO: +13.5%
- SI: +3.3%
- FI: +9.8%
- SE: -8.1%
- EU: -3.6%

August 2023:
- BE: +0.0%
- DE: +3.9%
- IE: -1.7%
- ES: -0.4%
- FR: +0.0%
- HR: +20.4%
- IT: -7.2%
- CY: +55.1%
- LV: +1.5%
- LT: +1.2%
- HU: +6.3%
- NL: -1.9%
- AT: +5.1%
- PL: +14.2%
- PT: +17.0%
- RO: -2.9%
- SI: +14.5%
- FI: +20.6%
- SE: -11.6%
- EU: -0.5%
Heavy lamb prices week 37

€/100 kg cw

2022

2023
Evolution of EU average light lamb prices

<table>
<thead>
<tr>
<th></th>
<th>BG</th>
<th>EL</th>
<th>ES</th>
<th>HR</th>
<th>IT</th>
<th>LV</th>
<th>HU</th>
<th>PT</th>
<th>SI</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2023</td>
<td>-5.5%</td>
<td>+0.0%</td>
<td>-0.1%</td>
<td>-0.6%</td>
<td>+3.5%</td>
<td>-5.6%</td>
<td>+2.4%</td>
<td>+10.7%</td>
<td>-2.6%</td>
<td>+0.8%</td>
</tr>
<tr>
<td>August 2022</td>
<td>+16.1%</td>
<td>+1.8%</td>
<td>+1.7%</td>
<td>+17.4%</td>
<td>-3.8%</td>
<td>+4.8%</td>
<td>+3.6%</td>
<td>+2.9%</td>
<td>+11.2%</td>
<td>+1.2%</td>
</tr>
</tbody>
</table>

Light lambs prices of August 2023 compared to EU July 2023

DG AGRI E3 SHEEP & GOAT
21 September 2023
Light lamb prices
week 37

€/100 kg cw

BG  EL  ES  HR  IT  LV  HU  PT  SI

2022  2023
World Market Prices
(Lamb carcasses)

€/100 kg carcass weight

€/100 kg

Jan 22
Feb 22
Mar 22
Apr 22
May 22
Jun 22
Jul 22
Aug 22
Sep 22
Oct 22
Nov 22
Dec 22
Jan 23
Feb 23
Mar 23
Apr 23
May 23
Jun 23
Jul 23
Aug 23
Sep 23
Oct 23
Nov 23
Dec 23

GB
NI
New Zealand
(Aram: North + South Island)
Australia
(Trade lamb)
Uruguay
(INAC prices)
Trade
EU imports of sheep & goatmeat and live animals
Trade figures (COMEXT)

EU IMPORTS of Sheep & Goat (Tonnes cwe)

EU IMPORTS of Sheep & Goat (Millions EUR)

United Kingdom | New Zealand | Australia | North Macedonia | Argentina | Other origins

Jan-Jun 21 | Jan-Jun 22 | Jan-Jun 23

Jan-Jun 21 | Jan-Jun 22 | Jan-Jun 23

DG AGRI E3 SHEEP & GOAT
21 September 2023
EU Imports of Sheep and Goat products

in Tonnes cwe


- FRESH
- FROZEN
- OTHERS
Evolution of NZ exports of sheep meat to the EU

Source: Eurostat
Evolution NZ Exports of sheep meat products to EU (in tonnes cw)

Sheep legs

- Fresh or chilled legs
- Frozen legs

Other meat products

- Other fresh/chilled cuts
- Other frozen cuts
- Fresh carcases
- Frozen carcases

DG AGRI E3 SHEEP & GOAT
21 September 2023
Evolution of AUS exports of sheep meat to the EU

Source: Eurostat
EU exports of sheep & goatmeat and live animals

Trade figures (COMEXT )

EU EXPORTS of Sheep & Goat (Tonnes cwe)

EU EXPORTS of Sheep & Goat (Millions EUR)
EU Exports of Sheep and Goat products

2018 2019 2020 2021 2022 2023
Jan18 Jan19 Jan20 Jan21 Jan22 Jan23

0 2 000 4 000 6 000 8 000 10 000 12 000 14 000 16 000 18 000

in Tonnes cwe

DG AGRI E3 SHEEP & GOAT
21 September 2023
Evolution EU exports of live sheep
(Excluding pure-bred breeding)

(Qty in 1000 heads)


Live Adults Live Lambs
## EU Export of SHEEP&GOAT to UK by Products from Jan to Jun

### In Tons of Carcase Weight

<table>
<thead>
<tr>
<th></th>
<th>2021 United Kingdom</th>
<th>Extra-EU</th>
<th>%</th>
<th>2022 United Kingdom</th>
<th>Extra-EU</th>
<th>%</th>
<th>2023 United Kingdom</th>
<th>Extra-EU</th>
<th>%</th>
<th>% 2023/2022 United Kingdom</th>
<th>Extra-EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Animals</td>
<td>0</td>
<td>33 307</td>
<td>0.0%</td>
<td>5</td>
<td>31 738</td>
<td>0.0%</td>
<td>12</td>
<td>32 288</td>
<td>0.0%</td>
<td>+132.9%</td>
<td>+1.7%</td>
</tr>
<tr>
<td>Meats</td>
<td>8 608</td>
<td>26 657</td>
<td>32.3%</td>
<td>9 717</td>
<td>25 635</td>
<td>37.9%</td>
<td>9 562</td>
<td>23 168</td>
<td>41.3%</td>
<td>-1.6%</td>
<td>-9.6%</td>
</tr>
<tr>
<td>Fresh</td>
<td>3 557</td>
<td>6 558</td>
<td>54.2%</td>
<td>4 591</td>
<td>6 918</td>
<td>66.4%</td>
<td>4 088</td>
<td>6 681</td>
<td>61.2%</td>
<td>-11.0%</td>
<td>-3.4%</td>
</tr>
<tr>
<td>Frozen</td>
<td>3 469</td>
<td>18 428</td>
<td>18.8%</td>
<td>3 957</td>
<td>17 428</td>
<td>22.7%</td>
<td>4 362</td>
<td>15 259</td>
<td>28.6%</td>
<td>+10.2%</td>
<td>-12.4%</td>
</tr>
<tr>
<td>Salted</td>
<td>8</td>
<td>9</td>
<td>92.8%</td>
<td>2</td>
<td>5</td>
<td>47.2%</td>
<td>3</td>
<td>6</td>
<td>44.3%</td>
<td>+13.7%</td>
<td>+21.2%</td>
</tr>
<tr>
<td>Prepared</td>
<td>1 567</td>
<td>1 632</td>
<td>96.0%</td>
<td>1 165</td>
<td>1 240</td>
<td>93.9%</td>
<td>1 106</td>
<td>1 175</td>
<td>94.1%</td>
<td>-5.1%</td>
<td>-5.3%</td>
</tr>
<tr>
<td>Salted Offals</td>
<td>7</td>
<td>30</td>
<td>23.2%</td>
<td>2</td>
<td>44</td>
<td>4.2%</td>
<td>3</td>
<td>47</td>
<td>7.5%</td>
<td>+91.3%</td>
<td>+6.8%</td>
</tr>
<tr>
<td><strong>Total SHEEP&amp;GOAT</strong></td>
<td><strong>8 608</strong></td>
<td><strong>59 964</strong></td>
<td><strong>14.4%</strong></td>
<td><strong>9 722</strong></td>
<td><strong>57 373</strong></td>
<td><strong>16.9%</strong></td>
<td><strong>9 574</strong></td>
<td><strong>55 456</strong></td>
<td><strong>17.3%</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## EU Import of SHEEP&GOAT from UK by Products from Jan to Jun

### In Tons of Carcase Weight

<table>
<thead>
<tr>
<th></th>
<th>2021 United Kingdom</th>
<th>Extra-EU</th>
<th>%</th>
<th>2022 United Kingdom</th>
<th>Extra-EU</th>
<th>%</th>
<th>2023 United Kingdom</th>
<th>Extra-EU</th>
<th>%</th>
<th>% 2023/2022 United Kingdom</th>
<th>Extra-EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Animals</td>
<td>1 243</td>
<td>1 243</td>
<td>99.9%</td>
<td>1 504</td>
<td>1 509</td>
<td>99.6%</td>
<td>1 497</td>
<td>1 506</td>
<td>99.5%</td>
<td>-0.4%</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Meats</td>
<td>28 458</td>
<td>62 812</td>
<td>45.3%</td>
<td>37 836</td>
<td>79 149</td>
<td>47.8%</td>
<td>45 348</td>
<td>91 283</td>
<td>49.7%</td>
<td>+19.9%</td>
<td>+15.3%</td>
</tr>
<tr>
<td>Fresh</td>
<td>26 620</td>
<td>41 984</td>
<td>63.4%</td>
<td>35 549</td>
<td>50 177</td>
<td>70.8%</td>
<td>42 164</td>
<td>55 068</td>
<td>76.6%</td>
<td>+18.6%</td>
<td>+9.7%</td>
</tr>
<tr>
<td>Frozen</td>
<td>988</td>
<td>19 975</td>
<td>4.9%</td>
<td>1 447</td>
<td>28 128</td>
<td>5.1%</td>
<td>1 896</td>
<td>34 926</td>
<td>5.4%</td>
<td>+31.0%</td>
<td>+24.2%</td>
</tr>
<tr>
<td>Salted</td>
<td>0</td>
<td>1</td>
<td>0.0%</td>
<td>0</td>
<td>4</td>
<td>0.0%</td>
<td>1</td>
<td>3</td>
<td>25.7%</td>
<td>-24.4%</td>
<td></td>
</tr>
<tr>
<td>Prepared</td>
<td>89</td>
<td>89</td>
<td>99.3%</td>
<td>105</td>
<td>105</td>
<td>99.7%</td>
<td>199</td>
<td>199</td>
<td>100.0%</td>
<td>+90.1%</td>
<td>+89.6%</td>
</tr>
<tr>
<td>Salted Offals</td>
<td>762</td>
<td>762</td>
<td>100.0%</td>
<td>736</td>
<td>736</td>
<td>100.0%</td>
<td>1 088</td>
<td>1 088</td>
<td>100.0%</td>
<td>+47.9%</td>
<td>+47.9%</td>
</tr>
<tr>
<td><strong>Total SHEEP&amp;GOAT</strong></td>
<td><strong>29 701</strong></td>
<td><strong>64 055</strong></td>
<td><strong>46.4%</strong></td>
<td><strong>39 340</strong></td>
<td><strong>80 659</strong></td>
<td><strong>48.8%</strong></td>
<td><strong>46 845</strong></td>
<td><strong>92 789</strong></td>
<td><strong>50.5%</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Main Importers of SHEEP&GOAT Products (up to June).

Source: GTA

Excl. Live animals

2022 (up to June).

China + H. Kong
United States
EU
Malaysia
South Korea

2023 (up to June).

China + H. Kong
United States
EU
Malaysia
South Korea

Source: GTA
Main Exporters of SHEEP&GOAT Products (up to June).

Source: GTA

Excl. Live animals
Report from EC to EP and Council on carcass classification and sales designations in the sheepmeat and goatmeat sector

Article 225(dd) of REGULATION (EU) No 1308/2013 (sCMO)

Only 19 questionnaires received from Member States
Still missing BG, EL, FR, HU, IE, LU, SE, SI and SK

- Questionnaires posted on CIRCA - GREX 23/02/2023
- Replies to AGRI-ANIMAL-PRODUCTS-EXT@ec.europa.eu
- Deadline by 30/04/2023

Why questionnaires:

To know your views and gather info from your sheep/goat sectors:
• The use or not use of carcass classification
• Any sales designations used for marketing sheep/goats

That information will help to draft the EC report before 30/06/2024

Contact: manuel.del-pozo-ramos@ec.europa.eu
Follow market updates via the Dashboard

http://ec.europa.eu/agriculture/dashboards/index_en.htm