

# Bord Bia – DAFM Live Exporters Meeting

Joe Burke

January 2018

Growing the success of Irish food & horticulture

***Bord Bia***  
Irish Food Board

## Bord Bia / Department of Agriculture, Agriculture, Food and the Marine & Live Exporters Meeting

<b>Time</b>	<b>Speaker - Topic</b>
10.00 – 10.30 am	<b>Registration, tea &amp; coffee</b>
10.30	<b><u>Bord Bia Presentations</u></b> <ul style="list-style-type: none"><li>• <b>Mark Zieg, Bord Bia Beef Sector Manager</b> Update on European beef market</li><li>• <b>Joe Burke, Bord Bia Livestock Sector Manager</b> Review of Irish live trade during 2017 &amp; outlook for the respective markets</li></ul>
11.30	<b><u>DAFM Presentations</u></b> <ul style="list-style-type: none"><li>• <b>James Casey, Veterinary Inspector, DAFM</b> Update on Live Animal Transport &amp; Shipping</li><li>• <b>John Melville, Superintending Veterinary Inspector, DAFM</b> Export Developments / Certification</li></ul>
	<b><u>Animal Health Ireland Update</u></b> <ul style="list-style-type: none"><li>• <b>David Graham, CEO, Animal Health Ireland</b></li></ul>
	<b>Lunch</b>

# Review and Outlook for EU Beef Sector

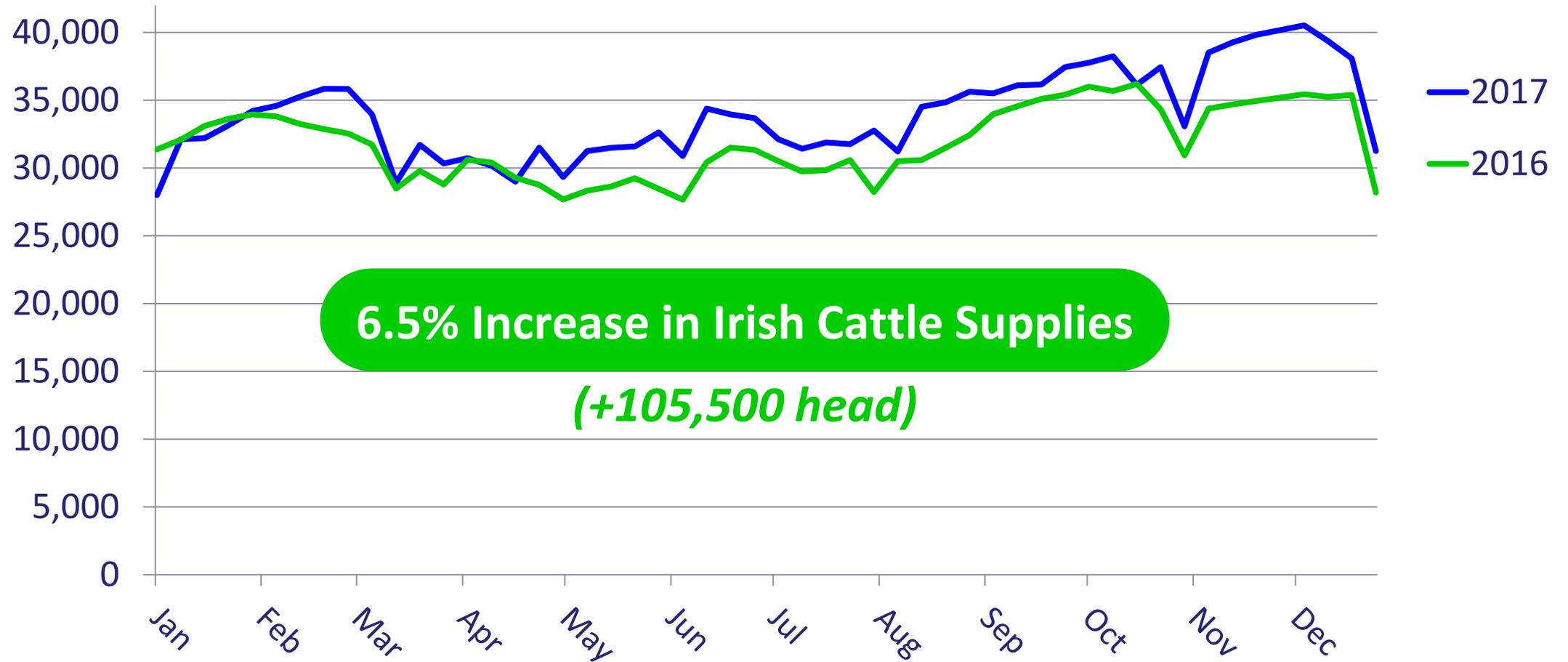
*January 2018*

*Mark Zieg*

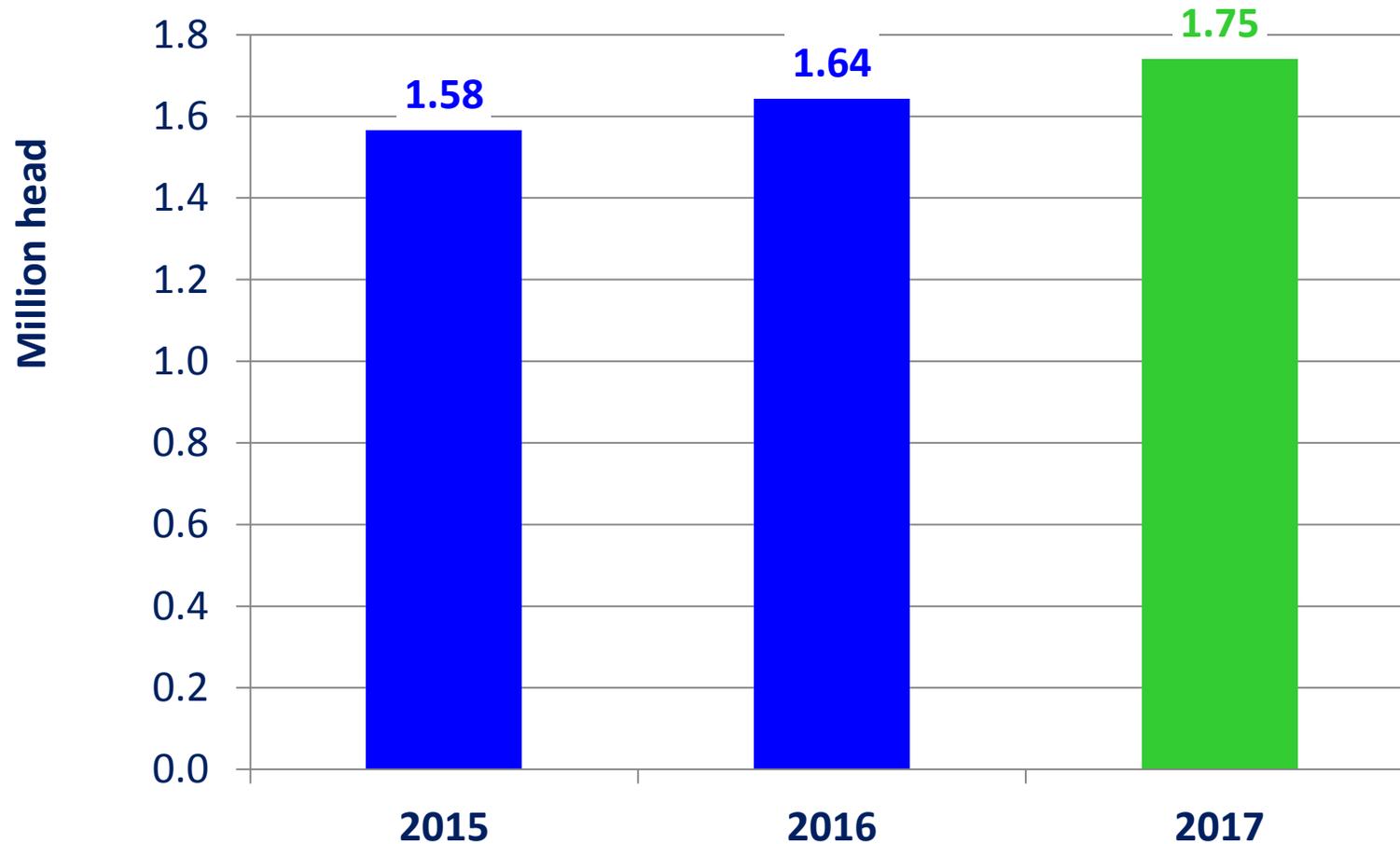
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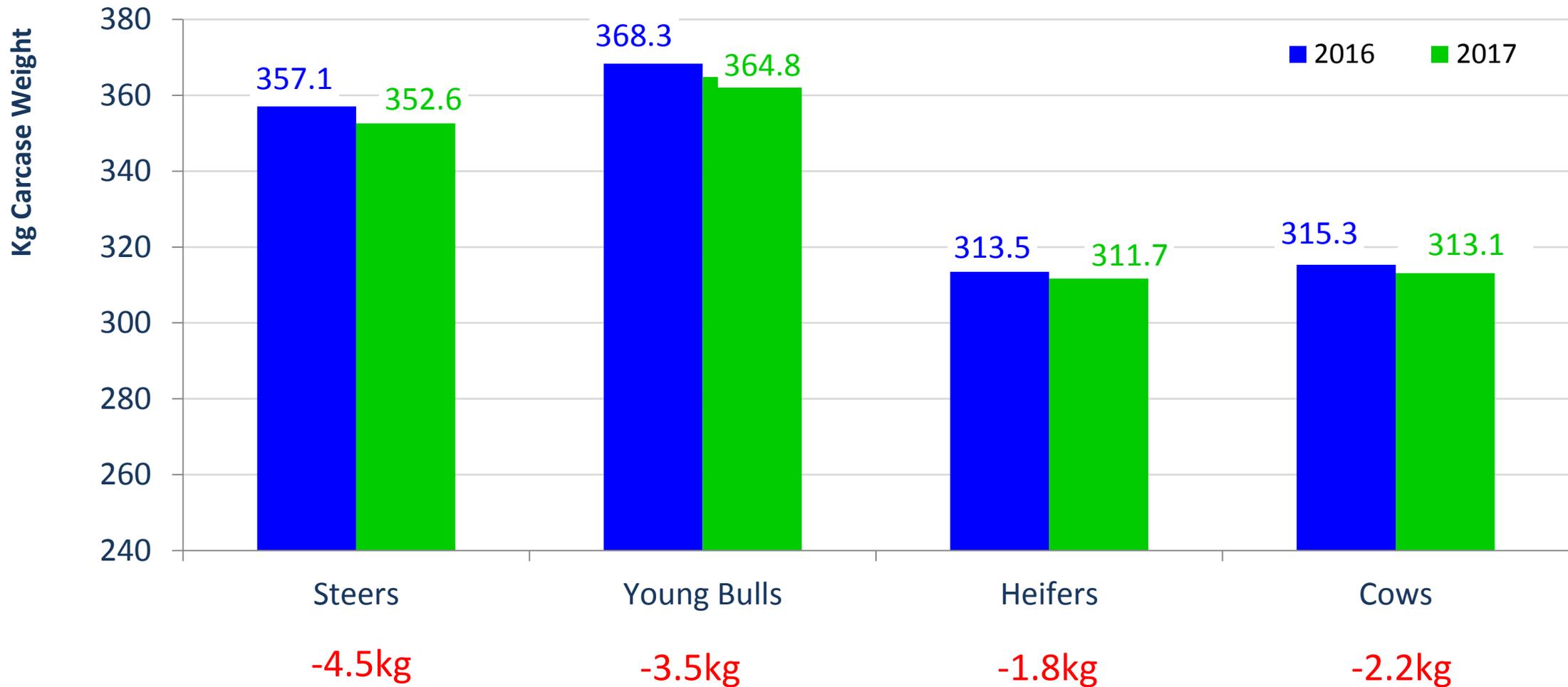
# Irish weekly finished cattle supplies (head)



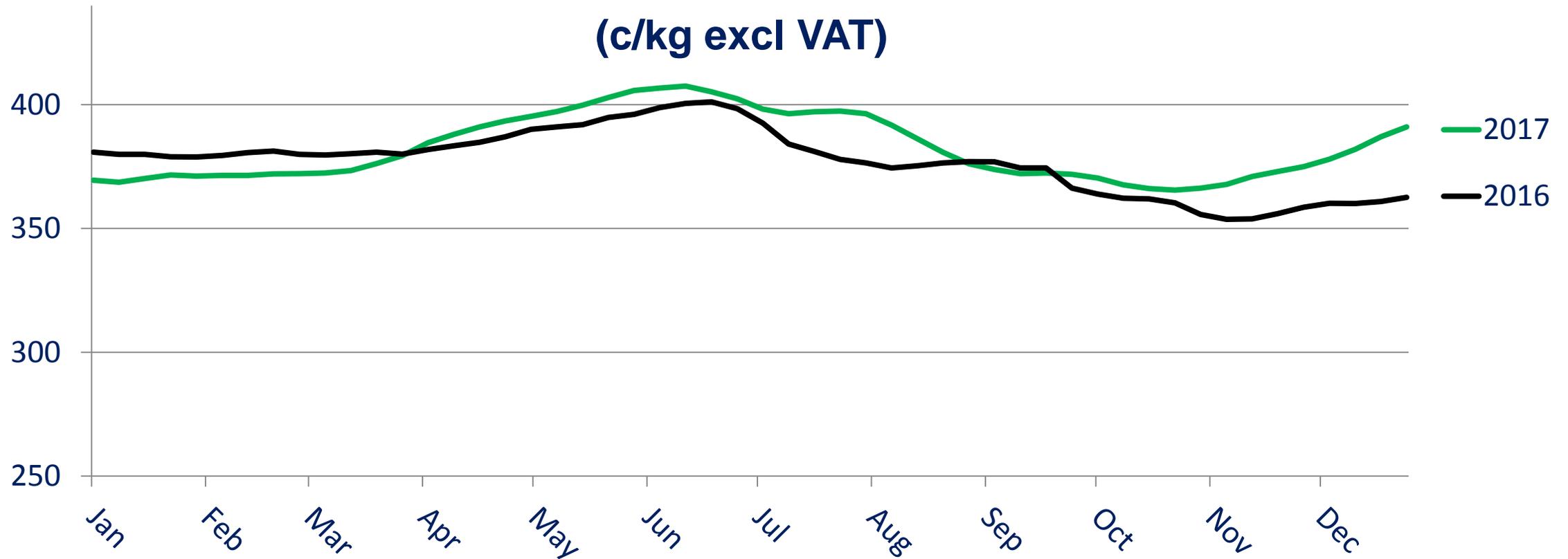
# Finished Cattle Supplies - Export Meat Plants 2015 - 2018(F)



# Average Carcase Weights Decline



# Producer Prices: Ireland R3 Steer (c/kg excl VAT)

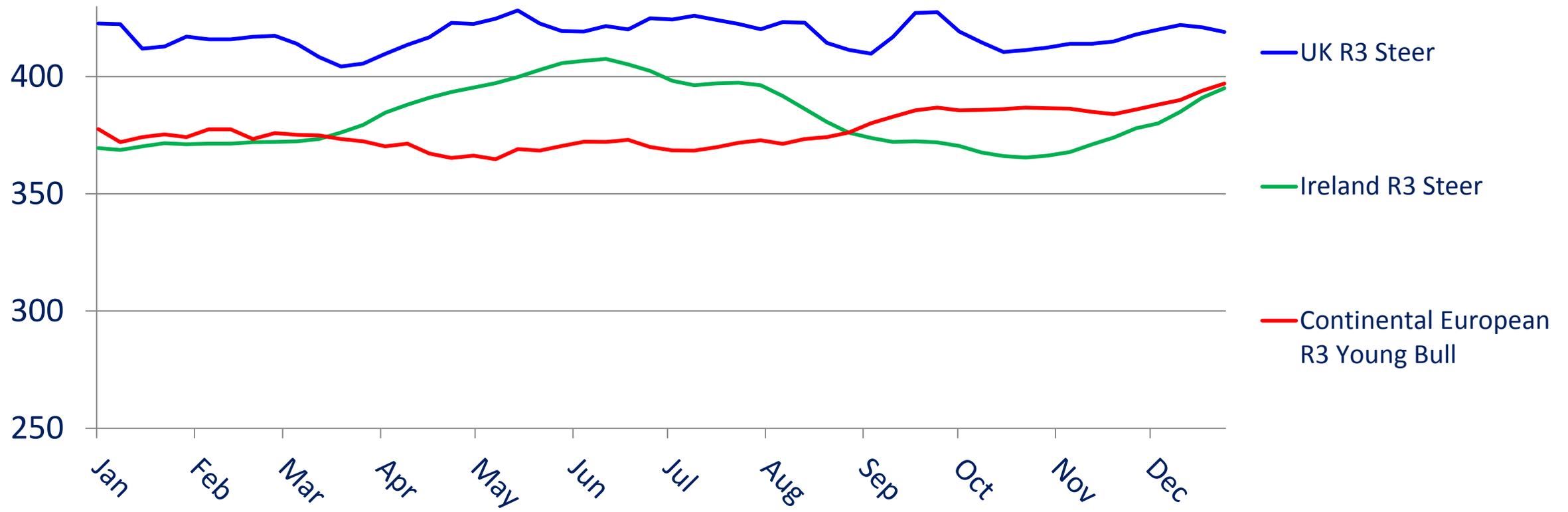


During 2017, Irish R3 steer price increased by 1.6% vs. 2016 (€3.84 vs. €3.78)

(w/e 31/12) Irish Price Dec '17: €3.95/kg vs. Dec. '16: €3.63/kg

# Producer Prices: Ireland vs. UK & Continental EU

(c/kg excl VAT)



**During 2017, Irish R3 steer €3.84 vs. UK R3 steer €4.16, Continental EU R3 YB €3.77**

(w/e 31/12) Irish Price €3.95/kg vs. UK €4.18 vs. Continental EU: €3.98/kg

# European Markets

## Beef Production 2017

### UK

- Jan-Nov prodn -2.5%
- YB's -11%, Cows -7%

### Germany

### Poland

- Production +14%

**EU Beef Production 1.6% higher** (EU Commission)

- Live Exports -2.3%

### Spain

- Production +1.9%
- Live exports +59%

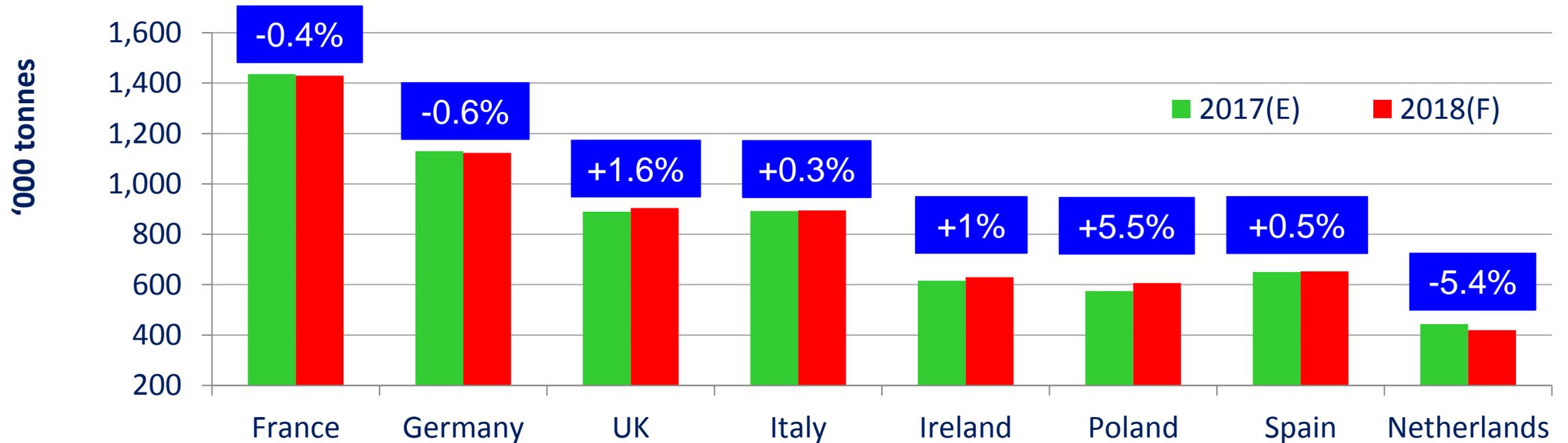
### Italy

- Production +5%
- Live imports 1.15m (+0.3%)

Source: EU Commission beef forecast working group

# EU beef production trend 2017 – 2018

Slight further increase forecast for 2018: +0.4%



Source: EU Commission beef forecast working group

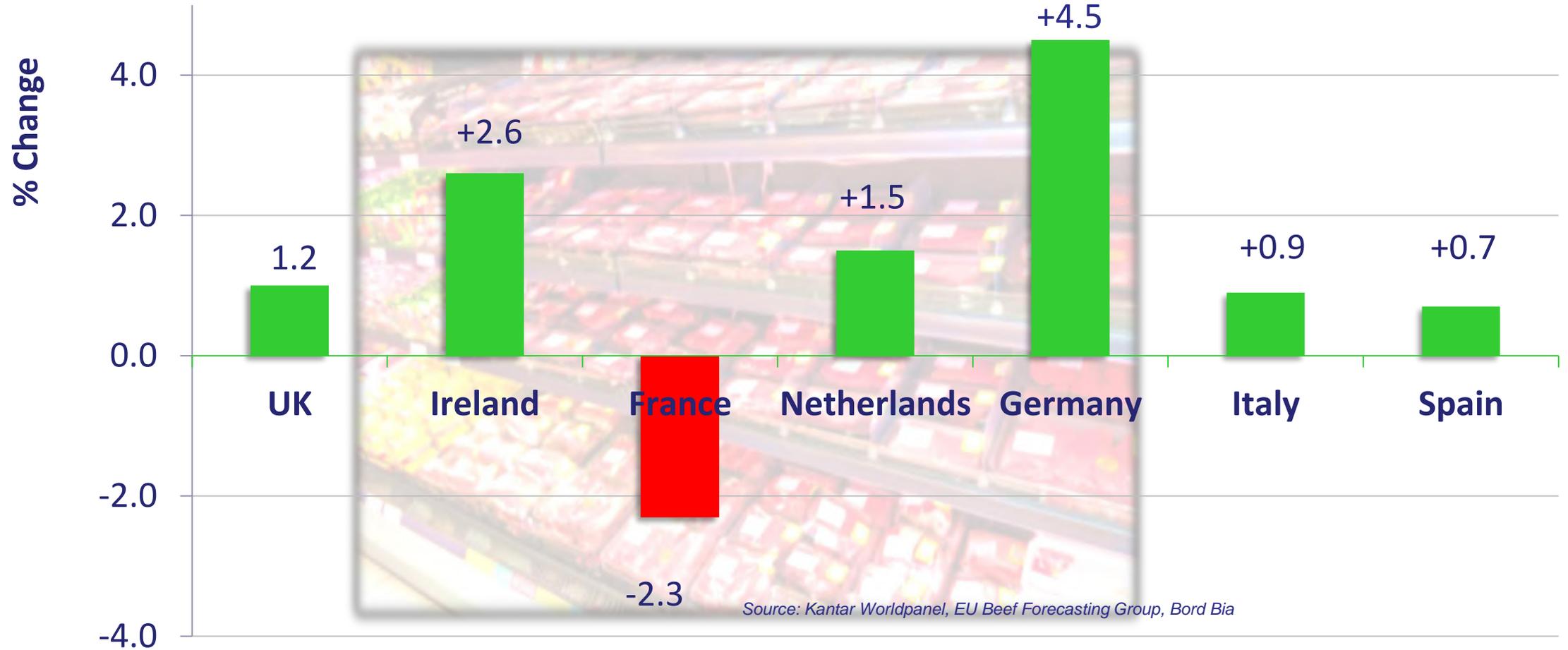
# EU Beef Consumption

Source: EU Beef Forecast Working Group

'000 tonnes

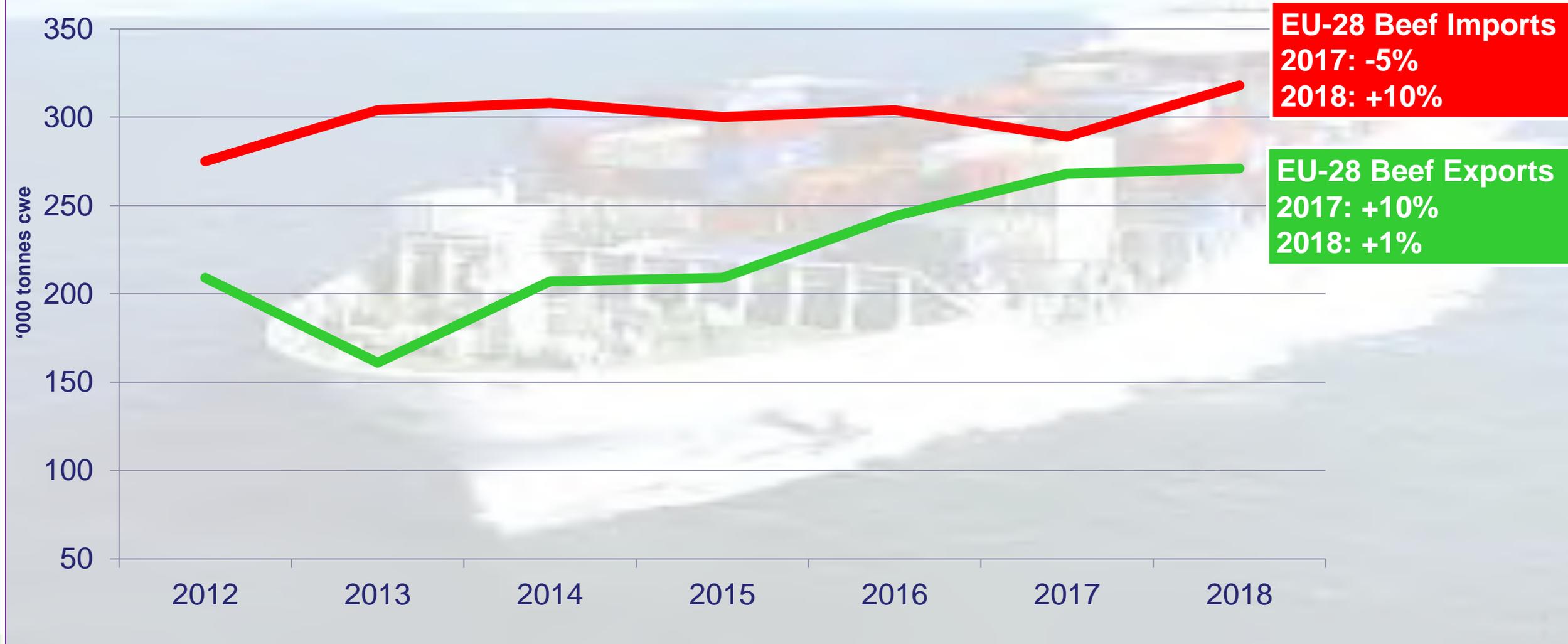


# Beef Consumption – Key Markets 2017



# EU Beef Imports/Exports

Source: EU Commission

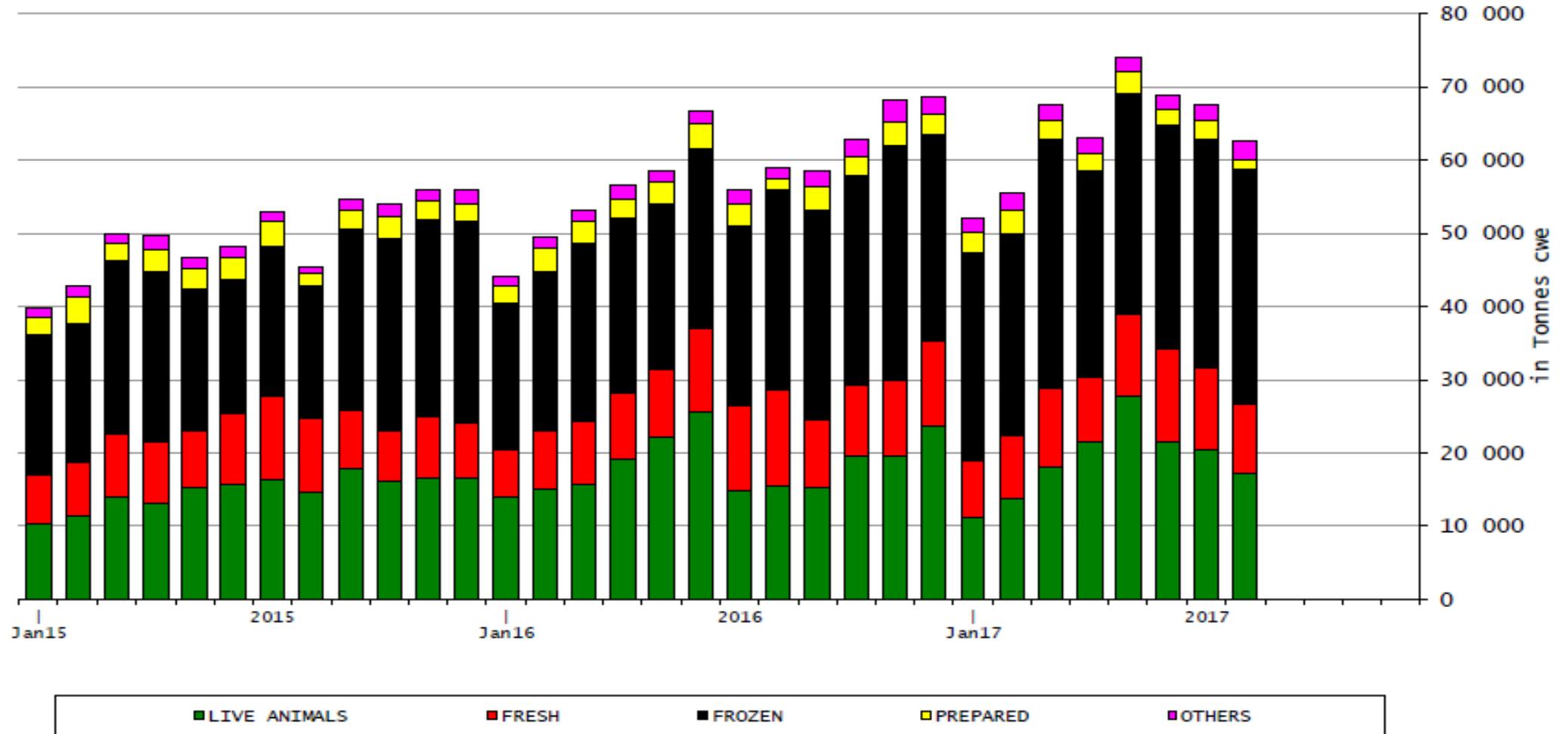


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# EU Exports of Beef and Live Cattle increase by 15.2%

## EU-28 Exports of BEEF products

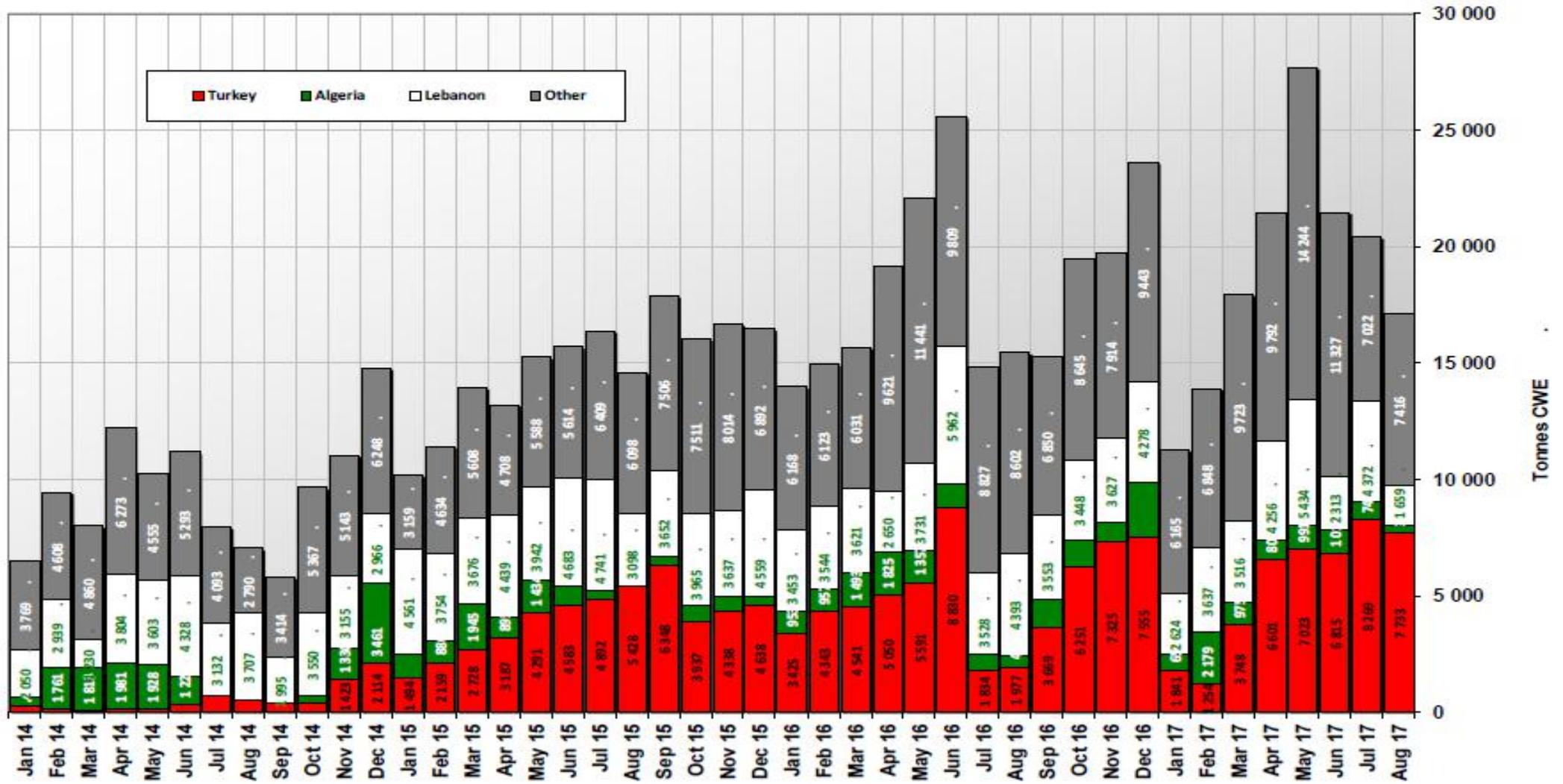


## EU Exports of Beef and Live Cattle increase by 15.2%

Destinations	2013		2014		2015		2016		Jan-Aug 17		Compared to Jan-Aug 16
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	28 573	6.3%	65 112	11.6%	45 198	7.6%	58 352	8.3%	56 664	11.1%	+ 70.5%
Turkey	5 086	1.1%	8 098	1.4%	57 504	9.6%	71 142	10.1%	48 762	9.5%	+ 23.3%
Israel	9 378	2.1%	8 353	1.5%	18 851	3.2%	41 616	5.9%	31 616	6.2%	+ 14.8%
Lebanon	24 007	5.3%	37 984	6.8%	50 288	8.4%	47 042	6.7%	29 001	5.7%	- 8.4%
Philippines	2 730	0.6%	11 839	2.1%	13 053	2.2%	24 247	3.5%	26 876	5.3%	+ 112.3%
Ivory Coast	21 619	4.8%	28 839	5.2%	35 742	6.0%	36 713	5.2%	26 711	5.2%	+ 11.9%
Ghana	40 878	9.0%	33 255	5.9%	37 364	6.3%	35 340	5.0%	25 559	5.0%	+ 12.2%
Bosnia-Herz.	24 068	5.3%	34 104	6.1%	39 896	6.7%	38 935	5.5%	23 888	4.7%	+ 0.4%
Libya	17 778	3.9%	14 280	2.6%	19 691	3.3%	29 714	4.2%	20 134	3.9%	- 3.0%
Algeria	25 911	5.7%	18 499	3.3%	16 085	2.7%	25 004	3.6%	19 549	3.8%	+ 26.3%
Switzerland	26 347	5.8%	26 634	4.8%	26 019	4.4%	25 655	3.7%	18 687	3.7%	+ 3.7%
Russia	72 281	16.0%	96 928	17.3%	13 546	2.3%	16 433	2.3%	14 798	2.9%	+ 74.8%
Norway	10 222	2.3%	7 879	1.4%	19 123	3.2%	18 364	2.6%	11 944	2.3%	- 20.7%
Vietnam	3 175	0.7%	6 410	1.1%	11 627	1.9%	22 252	3.2%	11 226	2.2%	- 17.8%
Egypt	2 592	0.6%	2 763	0.5%	9 805	1.6%	15 958	2.3%	8 748	1.7%	- 25.8%
Angola	10 589	2.3%	14 587	2.6%	9 643	1.6%	13 549	1.9%	8 540	1.7%	+ 25.4%
For.JRep.Mac	10 577	2.3%	11 370	2.0%	12 561	2.1%	11 781	1.7%	7 911	1.5%	- 0.9%
Other Destinations	116 726	25.8%	132 305	23.7%	160 282	26.9%	169 916	24.2%	120 612	23.6%	
Extra-EU	452 537		559 238		596 278		702 013		511 227		
% change			+ 24%		+ 7%		+ 18%		+ 15.2%		

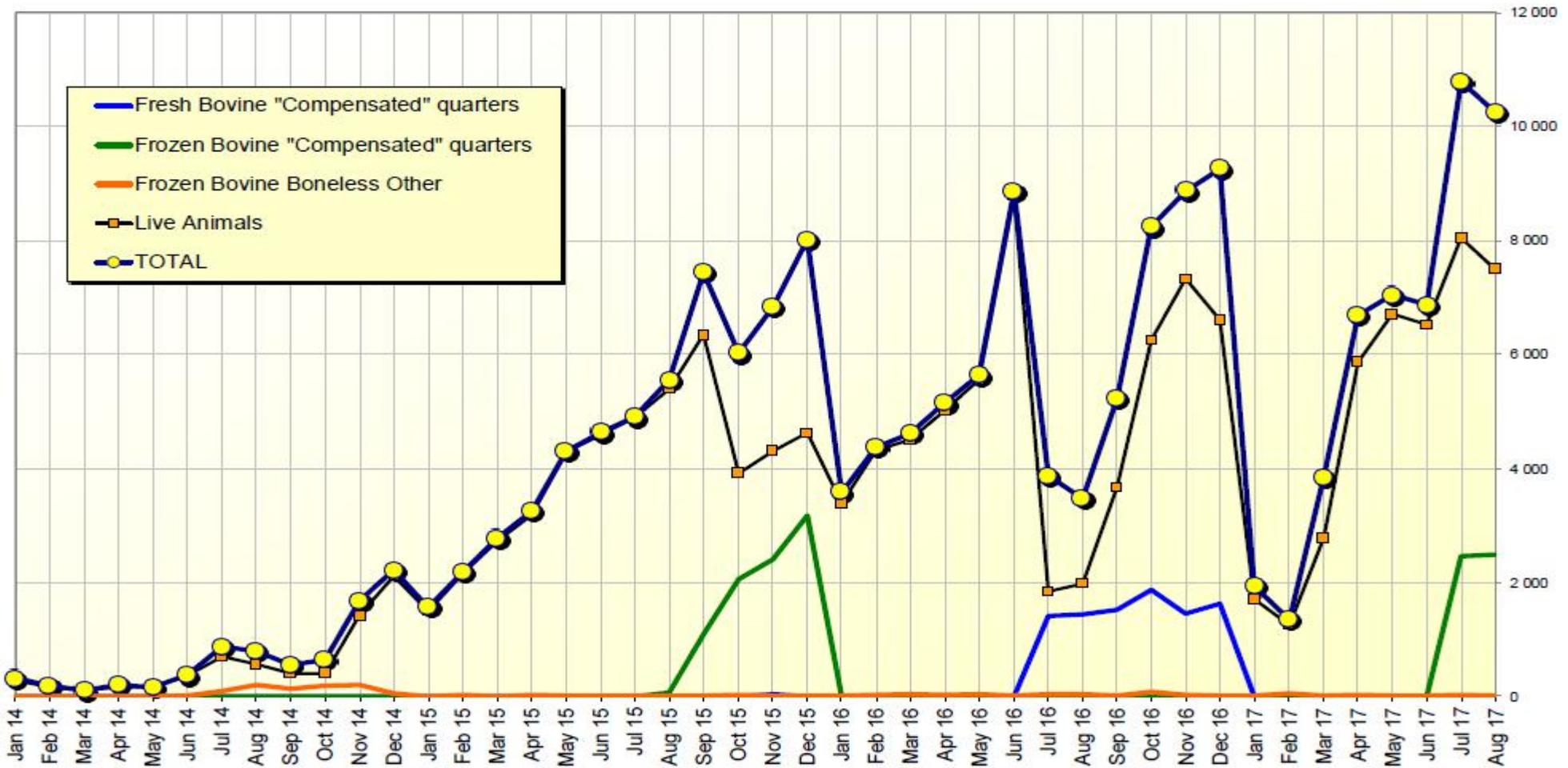
# EU-28 Exports of LIVE Bovine Animals

(Source COMEXT - Tonnes cwe)



# EU Exports to Turkey

Trade figures (COMEXT data) *tonnes cwe*



# Summary

- Irish cattle supplies increase by 105,000 hd
- Irish cattle prices 1.6% higher
- Also improvement across continental EU
- EU beef output grew by 1.6%
- Firm market situation underpinned by:
  - Growing EU consumption
  - Strong exports of beef and livestock to international markets



A close-up photograph of a brown cow's nose, partially obscured by vibrant green grass. The cow's skin is a rich, warm brown, and its nose is a darker, almost black color. The grass is in sharp focus, with individual blades clearly visible. The background is a soft, out-of-focus green, suggesting a natural outdoor setting. Overlaid on the center of the image is the text "Thank You Happy New Year!" in a clean, white, sans-serif font.

**Thank You  
Happy New Year!**