

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

Time	Speaker - Topic
10.30	<p><b><u>Bord Bia Presentations</u></b></p> <ul style="list-style-type: none"><li>• <b>Jim O'Toole, Bord Bia Meat &amp; Livestock Director</b> Update on European beef market</li><li>• <b>Joe Burke, Bord Bia Livestock Sector Manager</b> Review of Irish live trade during 2016 &amp; outlook for respective markets</li><li>• <b>Billel Haddad, Market Consultant - North Africa</b> Overview of North African Livestock Markets</li></ul> <p><i>Discussion</i></p>
11.30	<p><b><u>DAFM Presentations</u></b></p> <ul style="list-style-type: none"><li>• <b>James Casey, Veterinary Inspector, DAFM</b> Update on Live Animal Transport &amp; Shipping</li><li>• <b>Michael Sheahan, Superintending Veterinary Inspector, DAFM</b> Export Developments / Certification</li><li>• <b>Pat Keena, Assistant Principal, AIM Division, DAFM</b> Update on Identification &amp; Traceability</li></ul> <p><i>Discussion</i></p>
12.30	<ul style="list-style-type: none"><li>• <b>David Graham, Deputy Chief Executive, Animal Health Ireland</b> Update on AHI Programmes</li></ul>

# Review and Outlook for EU Beef Sector

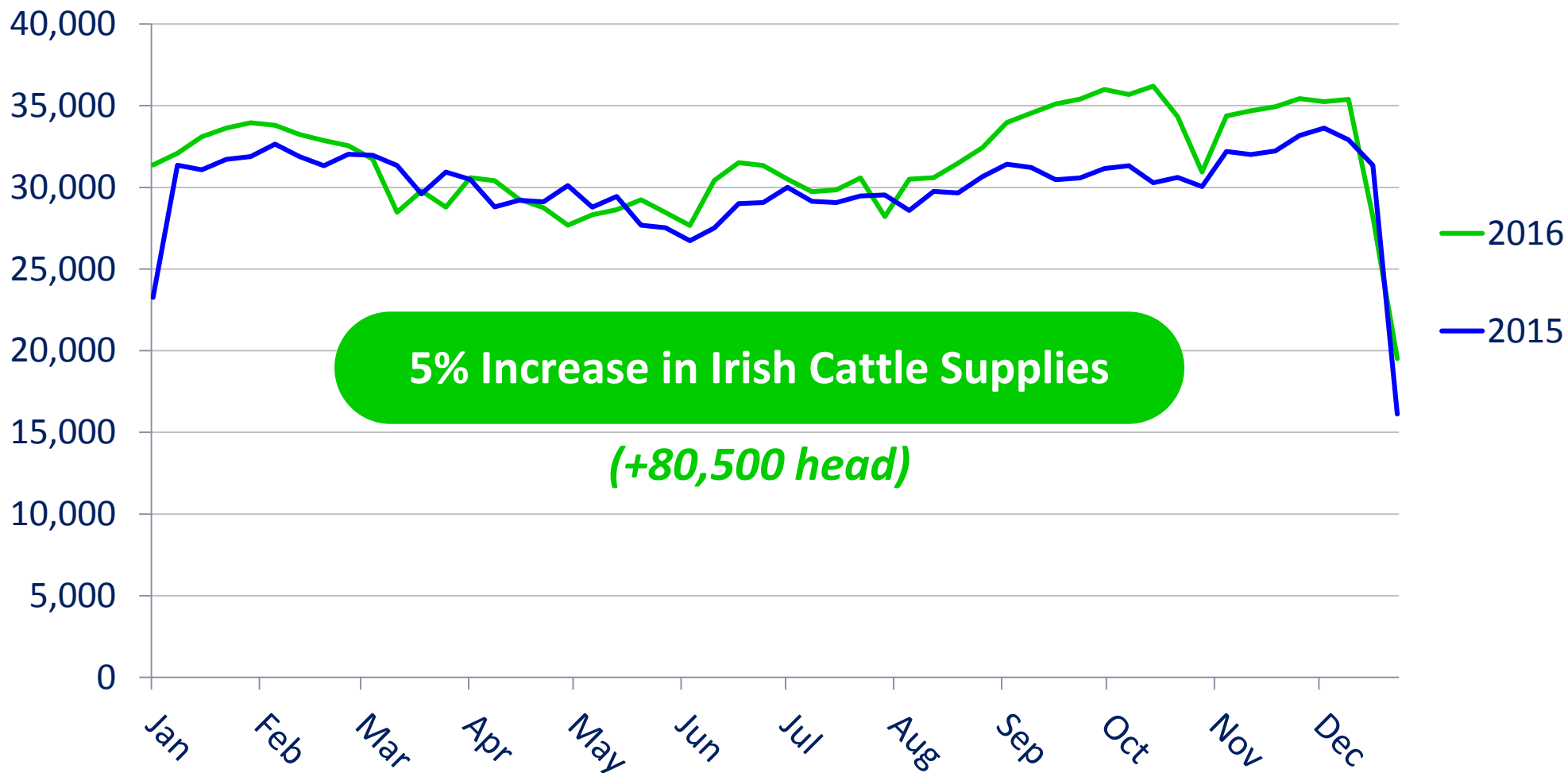
Jim O'Toole

January 2017

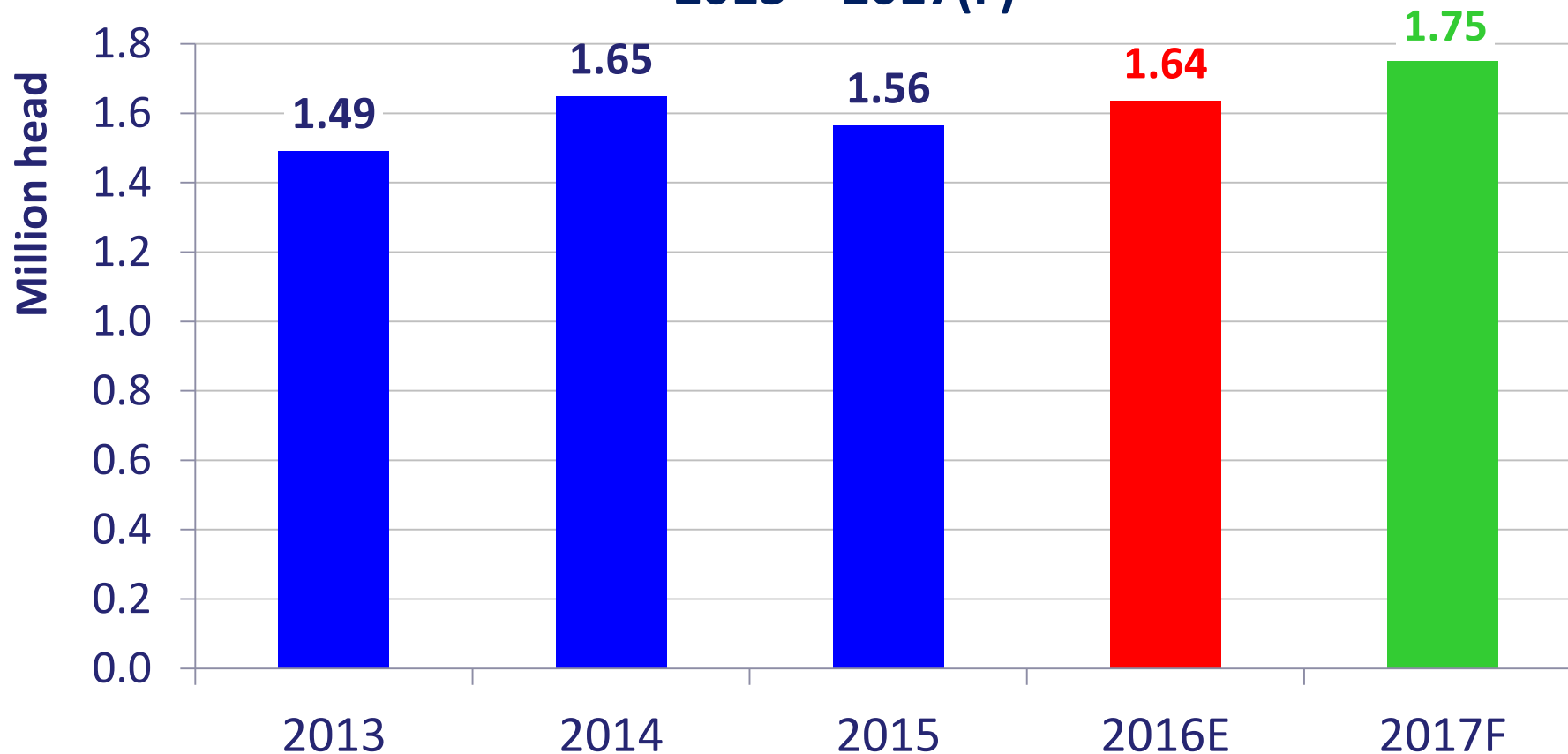
Growing the success of Irish food & horticulture

***Bord Bia***  
Irish Food Board

# Irish weekly finished cattle supplies (head)

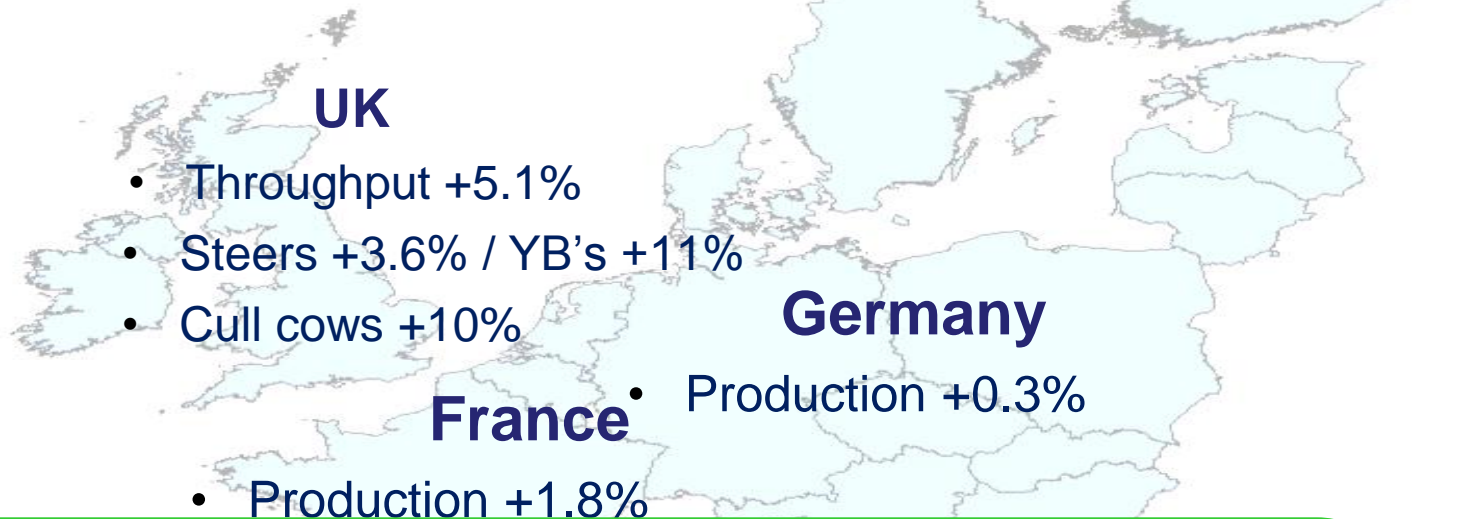


# Finished Cattle Supplies – Export Meat Plants 2013 – 2017(F)

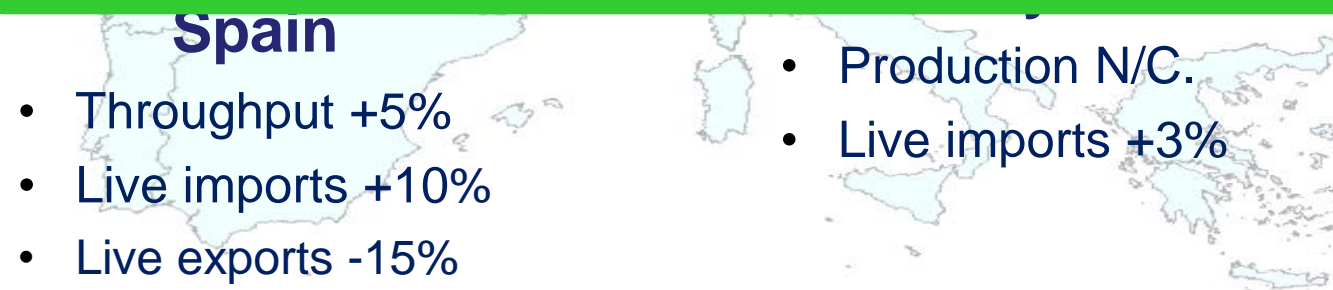


2017: 100-120,000 additional finished cattle likely

# European Markets Cattle Supplies 2016



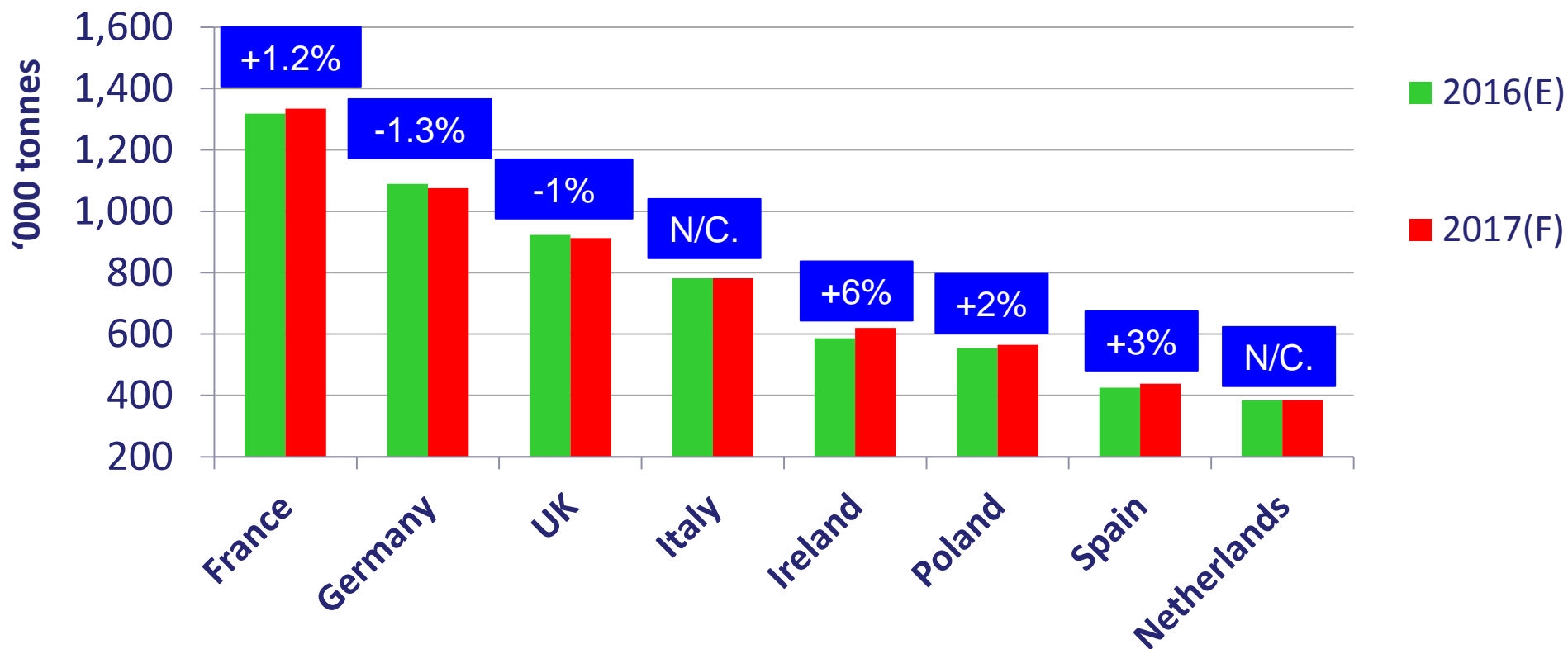
**EU Beef Production 3.5% higher**  
(EU Commission)



Source: EU Commission beef forecast working group

# EU beef production trend 2016 – 2017

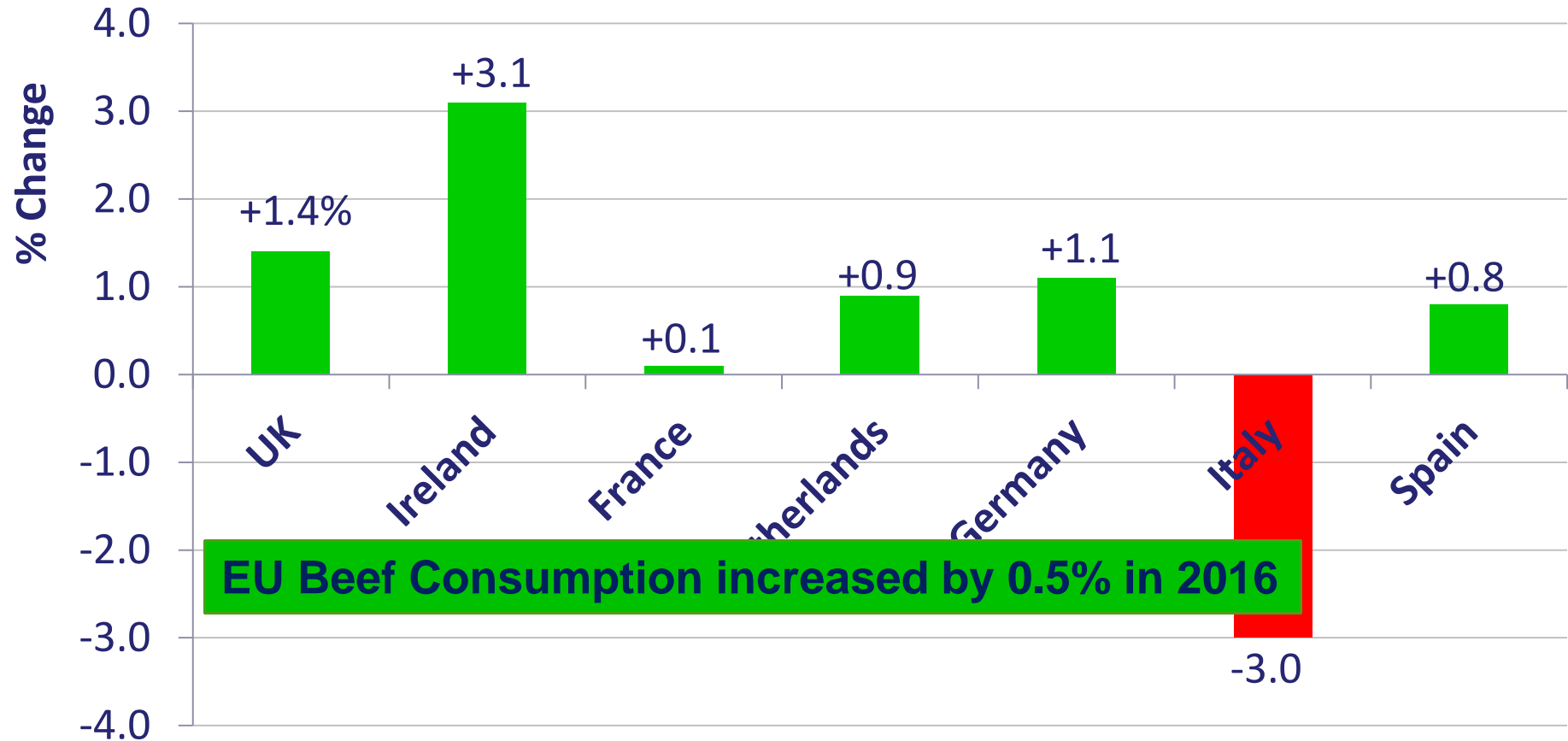
Volumes are forecast to increase slightly in 2017: +0.5%



Source: EU Commission beef forecast working group

# Beef Consumption in European Markets 2016

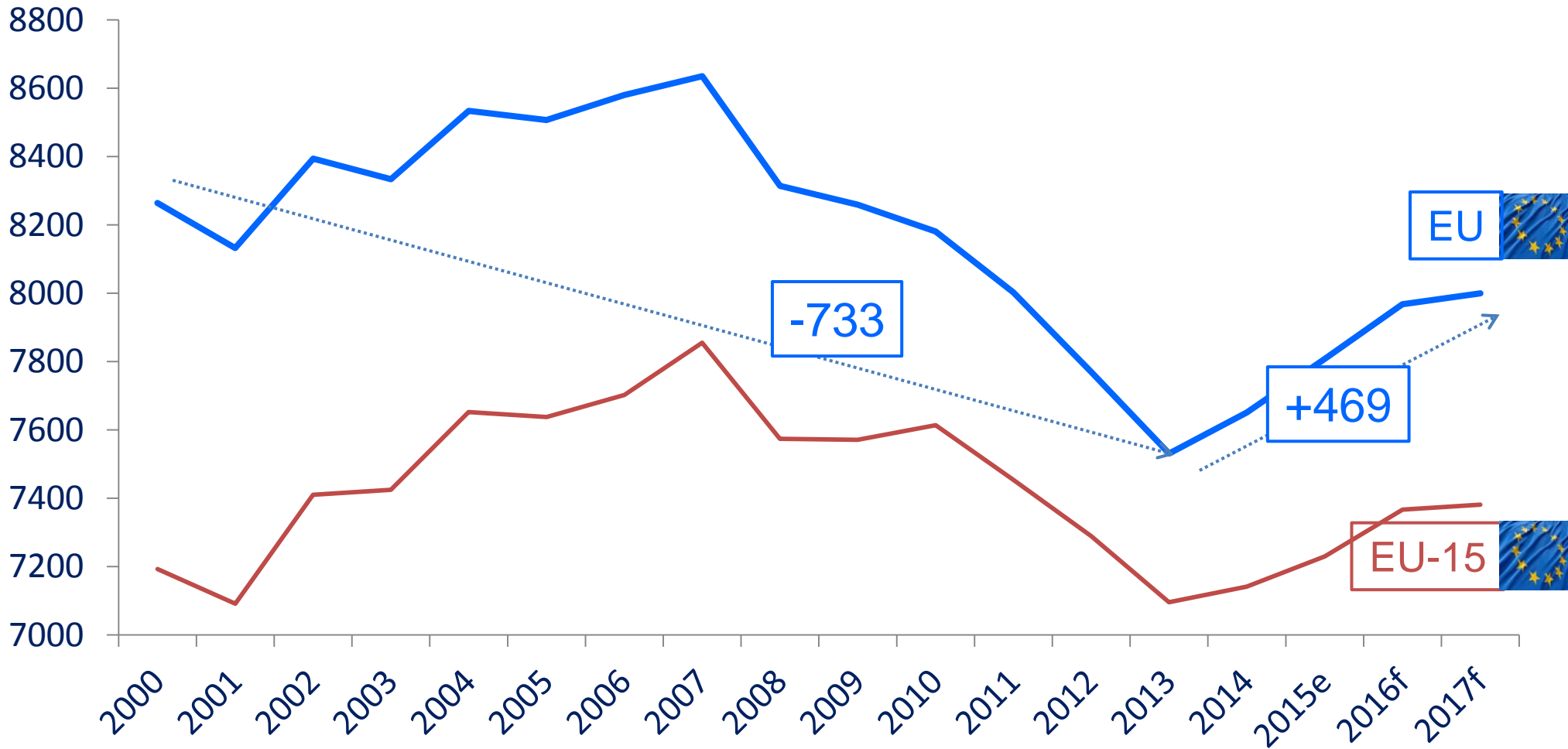
## % Change in Beef Sales



Source: Kantar Worldpanel, National Forecasts

# EU Beef Consumption

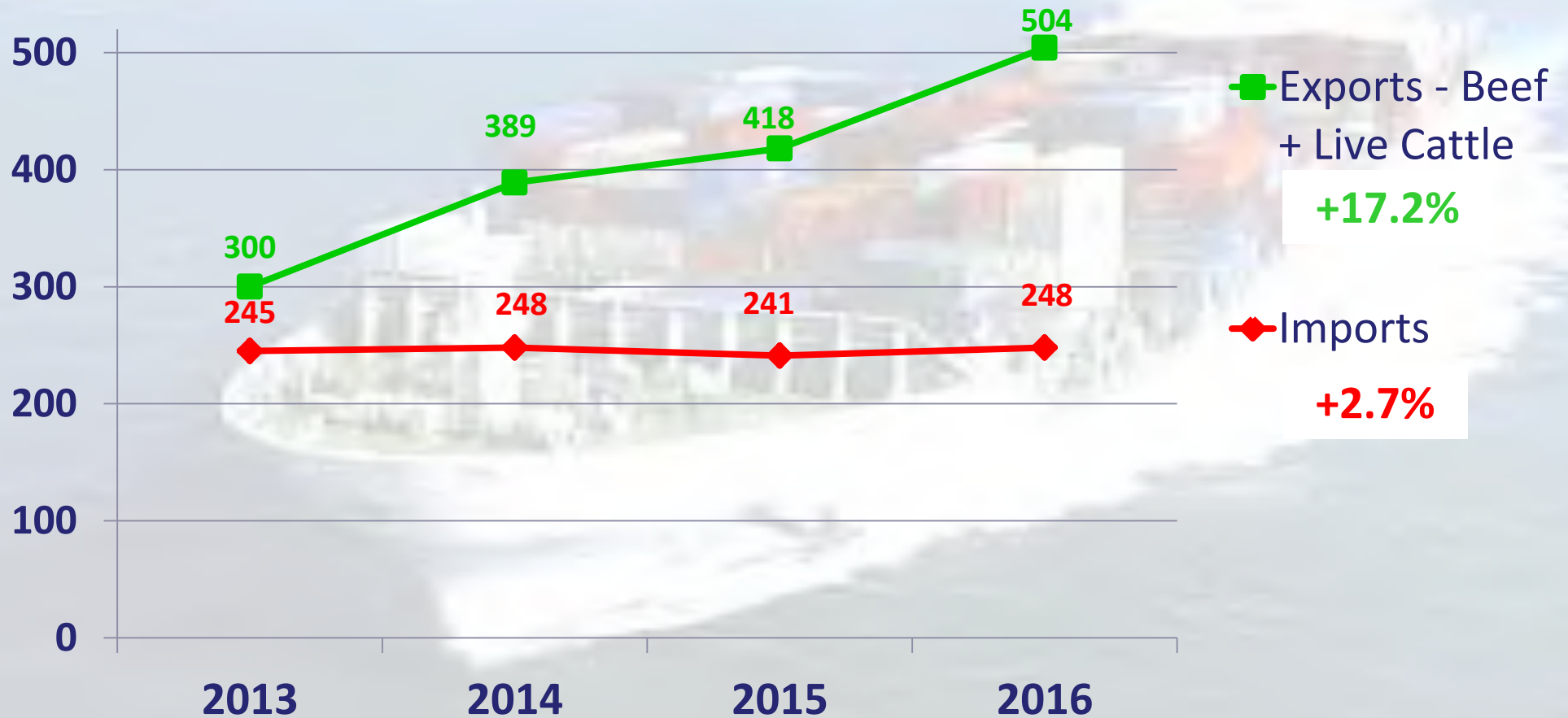
Further slight recovery for 2017 EU Commission Forecast





# EU Beef Imports/Exports (Jan-Oct)

'000 tonnes cwe

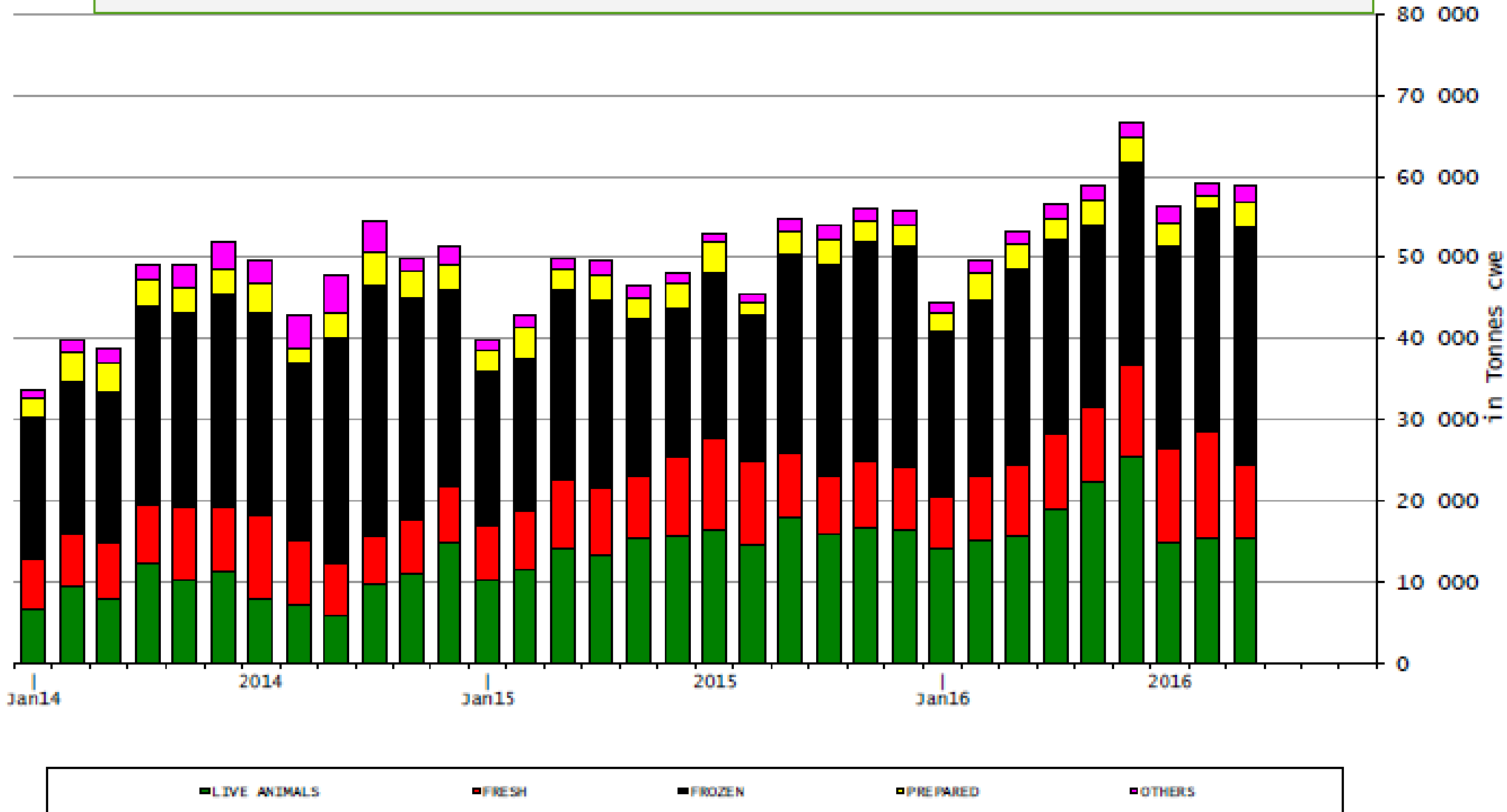


Source: Comext

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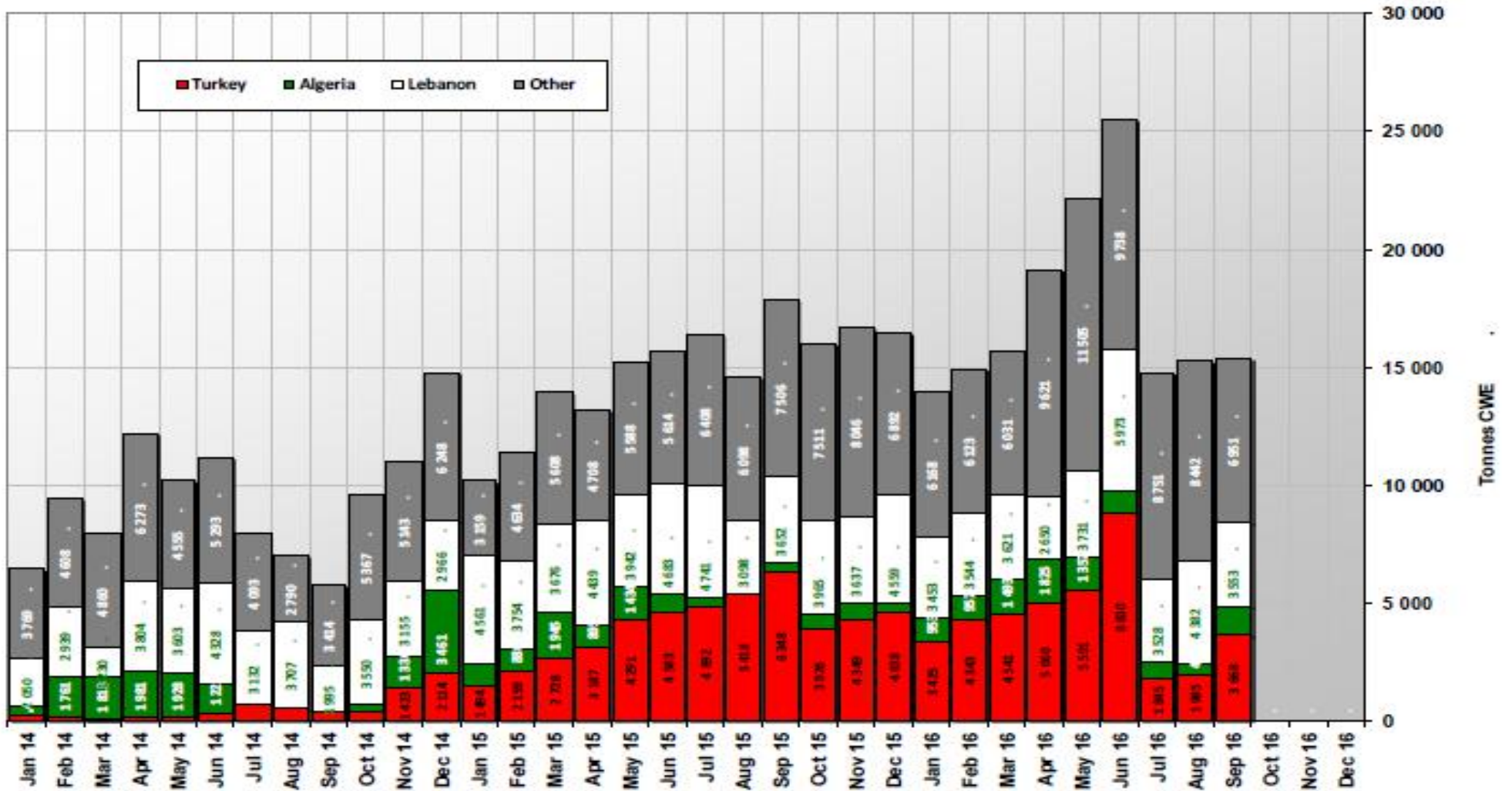
# EU Exports of Beef and Live Cattle increase by 17.2%



Growing the success of Irish food & horticulture

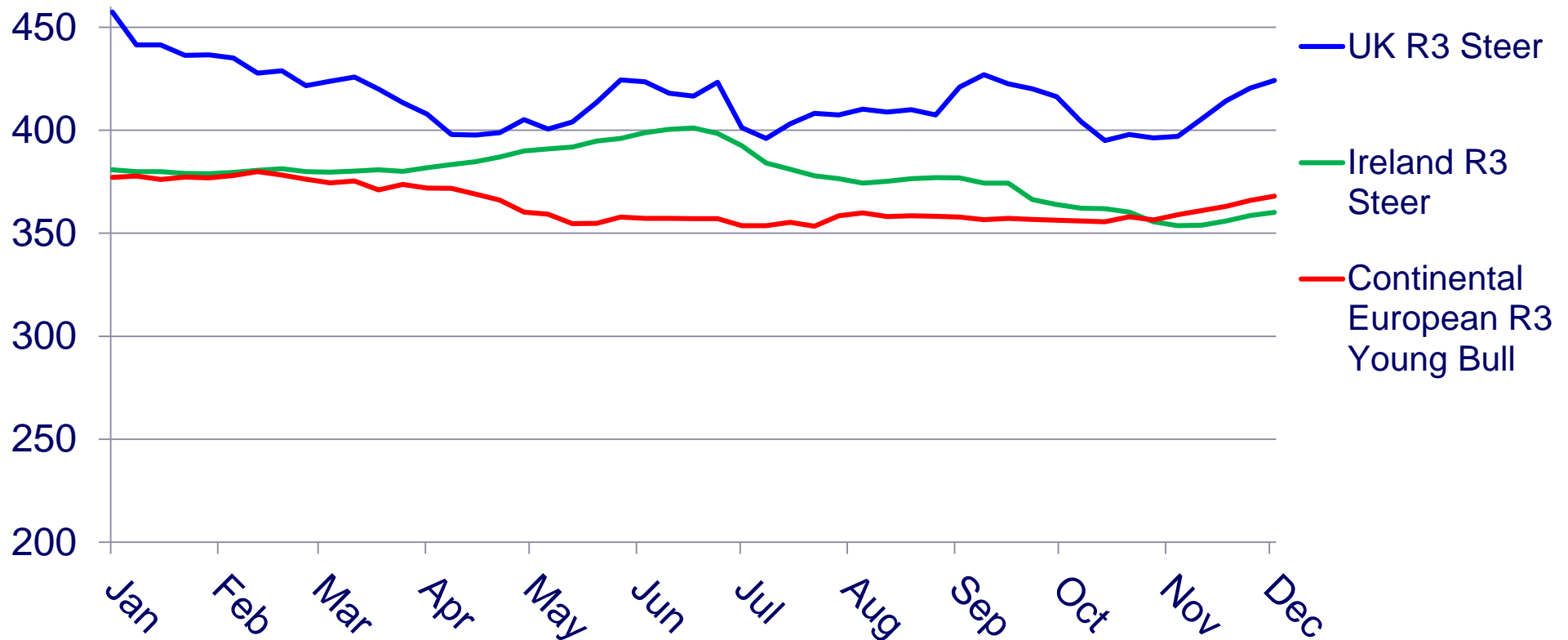
# EU-28 Exports of LIVE Bovine Animals

(Source COMEXT - Tonnes cwe)



# Producer Prices: Ireland vs. UK & Continental EU

(c/kg excl VAT)



(w/e 24/12) Irish Price €3.63/kg vs. UK €4.28 vs. Continental EU av: €3.73/kg

In Italy, R3 young bull price: €3.94/kg, Spain: €3.67, France: €3.72, Germany €3.88

# Summary

- 3.5% increase in EU beef production, leading to higher beef & live exports
- Dramatic increase in cull cow numbers
- Steady recovery in consumption
- Irish cattle prices declined by ~5%
- In sterling terms, UK cattle rose in the 2<sup>nd</sup> half of 2016. However, declined 14% in Euro, on account of exchange rate movements.
- Continental prices generally fell 2-3% below previous year's levels



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 lower half of the image is the text "Thank You Happy New Year!" in a bold, white, sans-serif font.

**Thank You  
Happy New Year!**