



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR AGRICULTURE AND RURAL DEVELOPMENT

Directorate G – Markets and Observatories

Brussels,
RR/fvn Ares(2019)1540142

MINUTES

Meeting of the

ECONOMIC BOARD OF THE EUROPEAN MEAT MARKET OBSERVATORY

Date: 22 February 2019

Chair: Michael Scannell, Director / [REDACTED], Head of Unit/ [REDACTED], Deputy Head of Unit

Delegations present: all stakeholders were present.

1. Approval of the agenda and of the minutes of the previous meeting

Agenda and minutes were approved.

2. Nature of the meeting

Non-public meeting.

3. List of points discussed

- Beef market situation, including a specific analysis on beef external trade
- Pigmeat market situation
- Data and indicators on meat consumption: state of play and next steps
- Meat quality predictions and consumer perceptions: presentation from INRA

4. Conclusions/recommendations/opinions

For beef and veal, discussions showed that the EU beef market remains in a fragile balance. In particular a hard Brexit could have a negative impact. The severe drought of last summer in certain Member States has led to some destocking at farm level. The increase in production has put pressure on prices. Moreover, the export performance in 2018 had been slightly weaker than in 2017.

For pigmeat, discussions showed that African swine fever remains the main threat for the EU market, while the Chinese import demand, given the extent of the ASF spread, might increase. Nevertheless, volumes remain uncertain as consumers switch to eating more poultry and beef. EU pig prices remained stable end of 2018 and into 2019, on the back of increased production as well as stable exports. Costs of production have slightly increased towards end of 2018, on lower crops and rocketing piglet prices, all these having put a strain on pig fatteners' margins.

A matter of concern for the Expert Group remains the current evolution of meat consumption patterns in the European Union. In this respect, Eurocommerce provided a presentation on trends in sales of meat products from a retail perspective. The Commission presented the latest state of play of the methodology proposed to estimate the bovine and pig production as well as consumption in EU. The Commission intends to organise an ad-hoc expert group on 2nd April 2019 to discuss the current methodology developed as regards EU meat consumption. The members of the Economic Board were requested to send names of experts to be considered for the ad-hoc expert group. Finally, a representative of INRA made a presentation on beef meat quality: predictions and consumer perceptions.

5. Next steps

The Observatory will further analyse the structure of production and consumption, based on the outputs of the 2nd April 2019 ad-hoc expert group.

The Observatory will keep monitoring the situation and evolution of the beef, veal and pigmeat markets paying particular attention to the challenges that the animal health situation and Brexit will pose in the immediate future.

6. Next meeting

The next meeting will take place on 14 June 2019 (provisional date).

< e-signed >

Michael SCANNELL
Director

List of participants– Minutes

***Meeting of the ECONOMIC BOARD OF THE EUROPEAN MEAT MARKET
OBSERVATORY***

Date: 22 February 2019

Organisation	NUMBER OF PERSONS
CEJA	4
CLITRAVI	4
COGECA	4
COPA	4
ECVC	4
EUROCOMMERCE	2
UECBV	3