

Up and down the meat value chain

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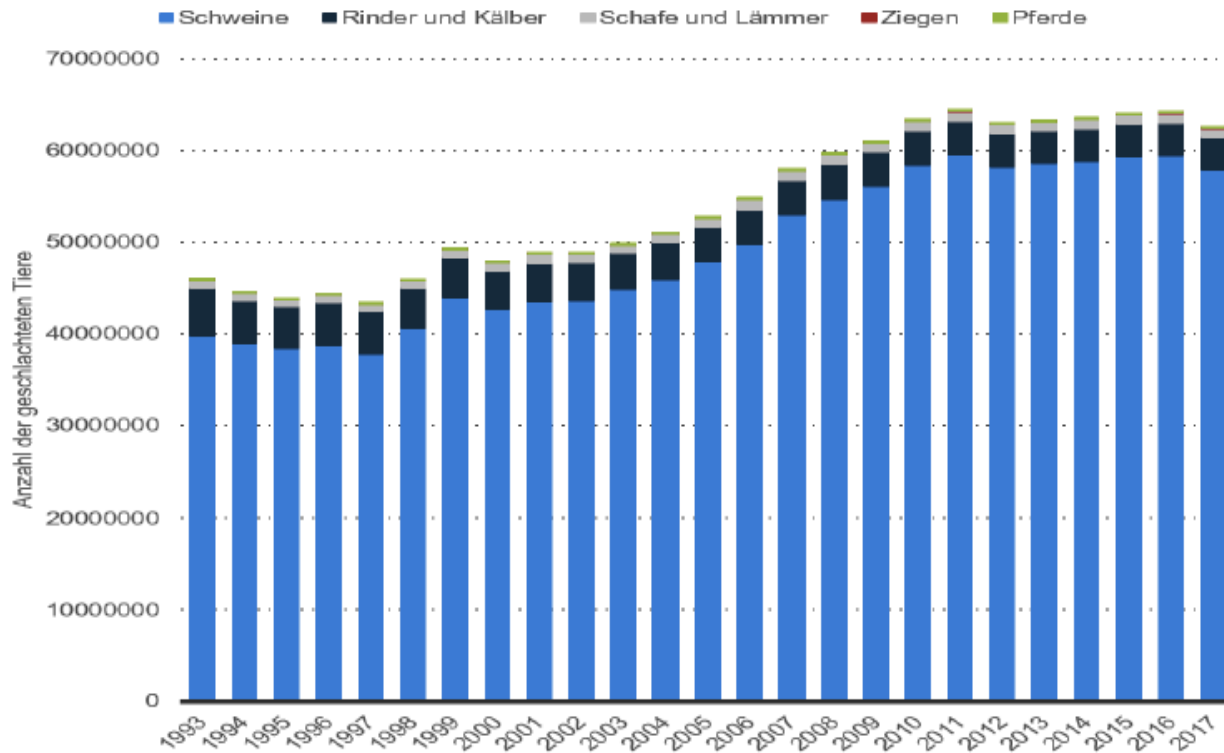


**Our project:
multidisciplinary and transnational**

- **An important market at the EU level**
- **Extra-UE market is growing**
- **Germany: meat accounts for 24% of the food sector**
- **Denmark: pork meat market is worth 4 billion €**
- **Belgium: is the 6th largest global exporter of pork meat**
- **Poland: pork accounts for 10.9% of the tot. agricultural production**
- **Italy: imports pork meat for 1.7 billion € and exports pork products for 1.2. billion €**

The pork meat market: an overview

Graph 16: Number of animals slaughtered between 1993 and 2017 in Germany.



Source: Statista (2018)

The “European slaughter-house”: Germany slaughters almost 60 million pigs per year

Abb. 2: Schlachttiere und Mastporkschweine in Deutschland

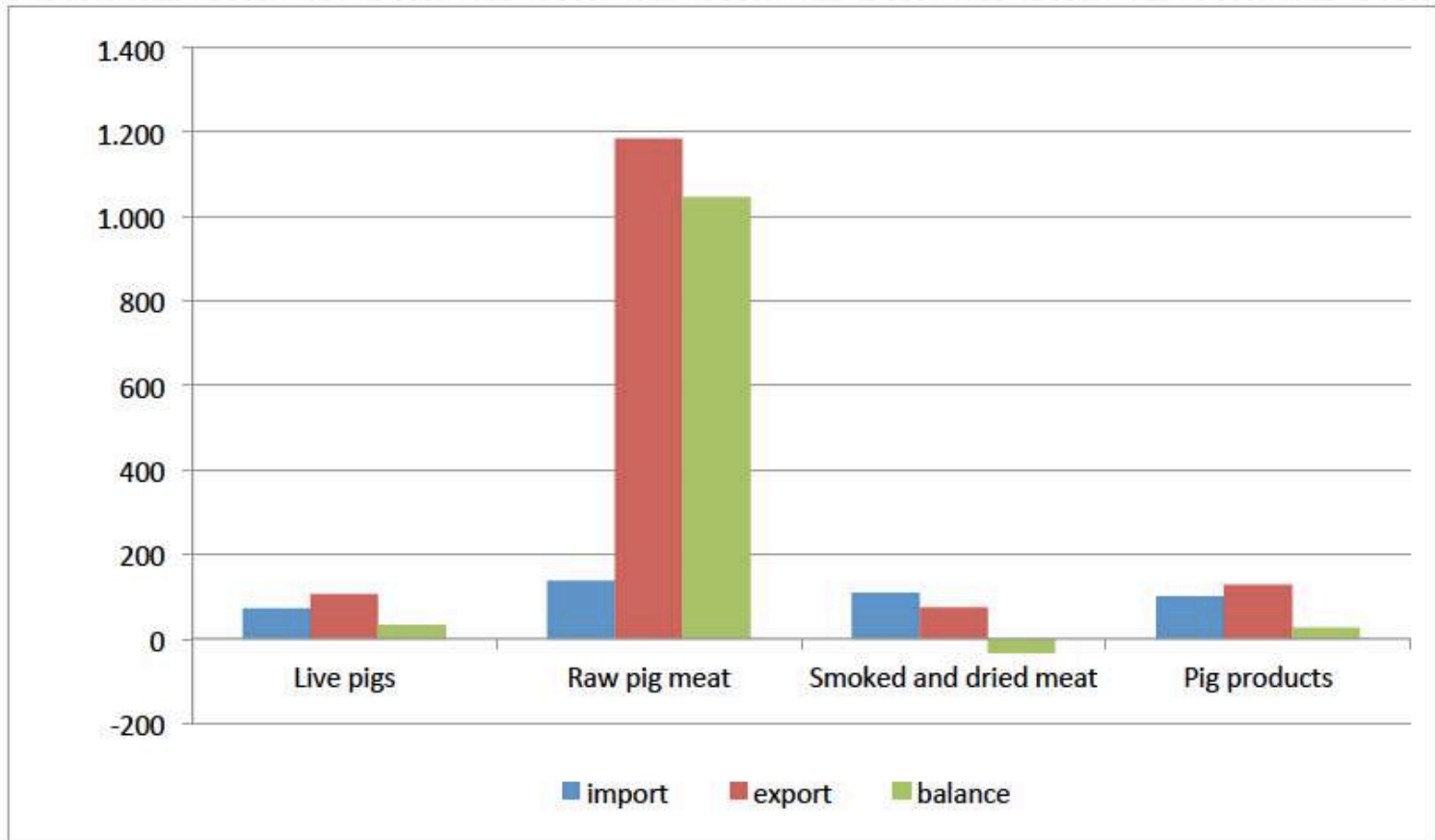
	Ferkel	Jungschweine unter 50 kg Lebendgewicht, ohne Ferkel	Mastschweine 50 bis unter 80 kg Lebendgewicht	Mastschweine 80 bis unter 110 kg Lebendgewicht	Mastschweine 110 und mehr kg Lebendgewicht	Jungsaunen, zum 1. Mal trächtig	Andere trächtige Sauen	Jungsaunen, noch nicht trächtig	Andere nicht trächtige Sauen
Baden-Württemberg	641.900	294.300	309.700	282.300	54.800	15.100	91.900	17.100	28.000
Bayern	882.600	617.100	732.100	626.100	143.100	23.800	143.800	22.600	35.100
Brandenburg	328.800	147.000	85.800	87.700	20.500	12.000	41.500	17.000	13.200
Hessen	154.600	103.500	114.800	116.800	25.800	4.100	22.100	4.200	6.500
Mecklenburg-Vorpommern	276.400	181.400	138.100	98.400	20.600	13.000	44.900	15.400	11.000
Niedersachsen	2.243.200	1.648.200	1.937.200	1.873.300	384.500	51.600	299.300	33.900	74.400
Nordrhein-Westfalen	64.124	1.830.100	1.396.600	1.558.100	1.478.100	45.300	268.400	35.600	68.200
Rheinland-Pfalz	38.419	44.300	34.500	36.700	31.700	1.200	6.100	800	2.200
Saarland	300	700	1.000	800	200	00	100	00	00
Sachsen	281.100	138.300	85.700	85.500	28.500	8.900	41.000	9.400	8.800
Sachsen-Anhalt	503.500	226.800	136.300	125.500	31.000	20.800	79.800	16.900	18.500
Schleswig-Holstein	310.500	314.600	324.400	296.400	75.300	10.000	53.700	11.500	10.700
Thüringen	355.500	99.300	84.500	78.800	21.800	12.300	50.100	14.400	12.800

The largest share of pigs goes to slaughtering, not to reproduction

IMPORT EXPORT

	import	export	balance
Live pigs	73.2	106.2	33.0
Breeding pigs	8.7	3.6	-5.1
Slaughter and utility pigs	64.5	102.6	38.1
Raw pig meat	138.6	1186.1	1047.5
Smoked and dried meat	109.1	74.4	-34.7
Pig products	101.4	128.7	27.3
Total	422.3	1495.4	1073.1
Of which intra-EU-28	422.2	1410.2	988.0

Belgian companies breed and slaughter pigs and then send the meat for processing mainly to Germany and Poland



Belgium mainly exports raw meat

Udviklingen i eksporten af grisekød

Fordelt på produkter

Tons	1997	2007	2016	2017
Bacon	130.115	94.884	53.975	42.719
Biprodukter	169.316	263.709	298.164	267.132
Levende grise	66.379	227.198	394.209	421.895
Pølser	58.002	33.429	35.710	34.139
Tilberedt eller konserveret	118.204	65.636	51.691	49.087
Udskæringer	795.976	1.114.979	1.040.905	1.007.134
Hele og halve grise/søer	49.373	73.041	88.004	85.912
I alt	1.387.365	1.872.875	1.962.659	1.908.017

**Danish export decrease for meat products
and grows for pigs and raw meat**

Udviklingen i eksporten af grisekød

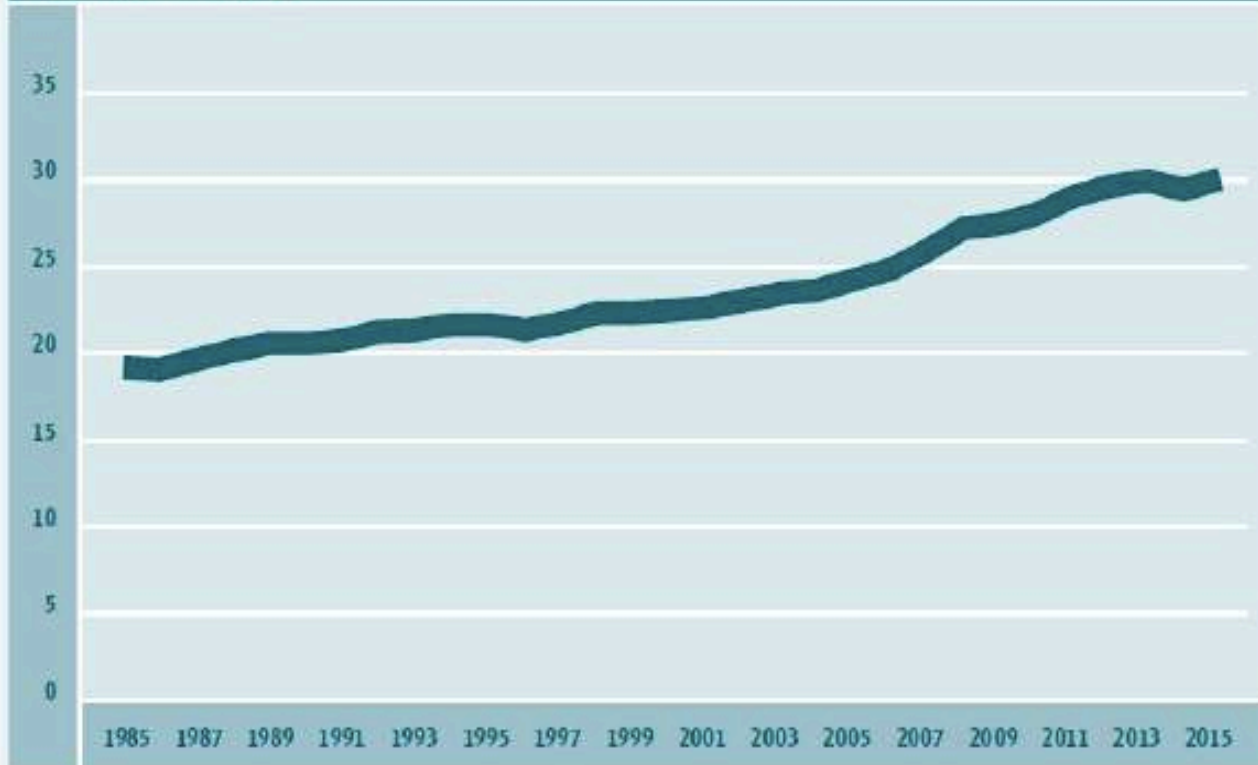
Fordelt på hovedmarkeder

Tons	1997	2007	2016	2017
Tyskland	321.344	503.709	561.495	553.455
Polen	19.210	122.378	274.396	301.441
UK	236.023	303.661	213.498	204.628
Italien	101.189	153.256	119.218	118.659
Sverige	42.382	68.792	38.164	35.273
Øvrige EU-lande	229.600	188.215	135.247	157.059
EU-lande i alt	949.749	1.340.011	1.342.019	1.370.516
Kina/Hong Kong	2.674	48.955	312.279	244.078
Japan	156.724	159.831	127.488	119.179
Australien	163	32.924	56.827	44.535
USA	51.755	45.119	31.730	34.625
Øvrige 3. lande	221.775	246.036	92.317	95.084
3.-lande i alt	433.091	532.864	620.640	537.500
I alt	1.382.840	1.872.875	1.962.659	1.908.017

Who buys Danish meat?

Figure 9

Piglets per sow per year.



Source: CEDEF

Denmark recently specialised in piglets

Table 0: foreign trade in pork and live animals [thousand tons]

	2009	2010	2011	2012	2013	2014
Exports	336	418	500,1	585,5	705,6	619,7
Imports	614	602	675,2	748,7	819	817
Balance	-278	-184	-175,1	-163,2	-113,4	-197,3

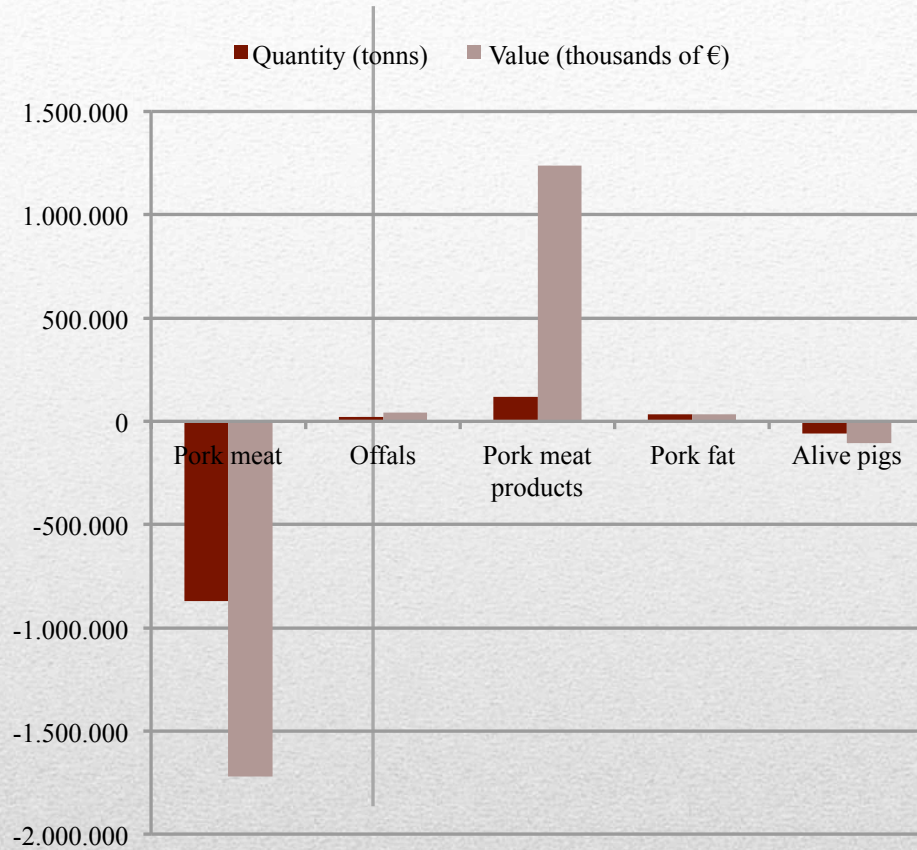
Source: Agricultural Statistical Yearbook 2014, Statistical Yearbook 2015

Table 4: Slaughter of pigs [MIO pcs]

2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
18,8	16,5	18,2	18,4	17,7	18,8	20,5	21,3	21,8	22,1

Source: Agricultural Statistical Yearbook 2017, CSO

The number of pigs slaughtered per year is growing in Poland



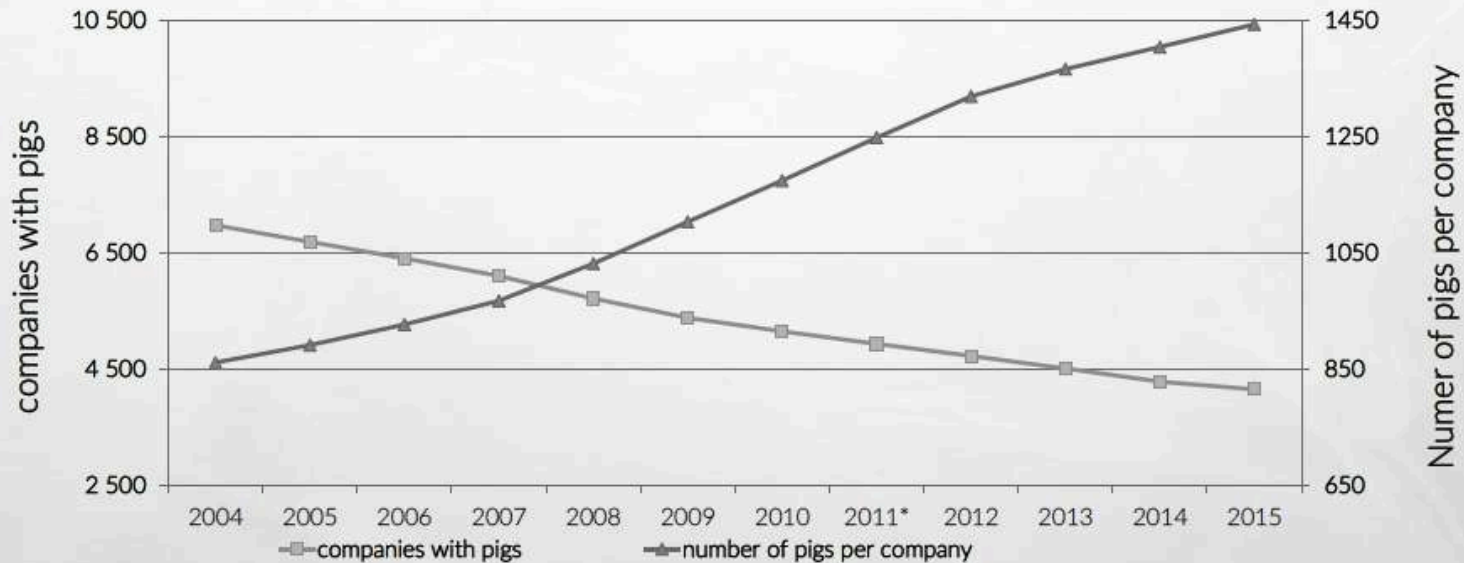
The Italian trade balance for pork meat and pork meat products

Graphic 1: Number of sites and hectares



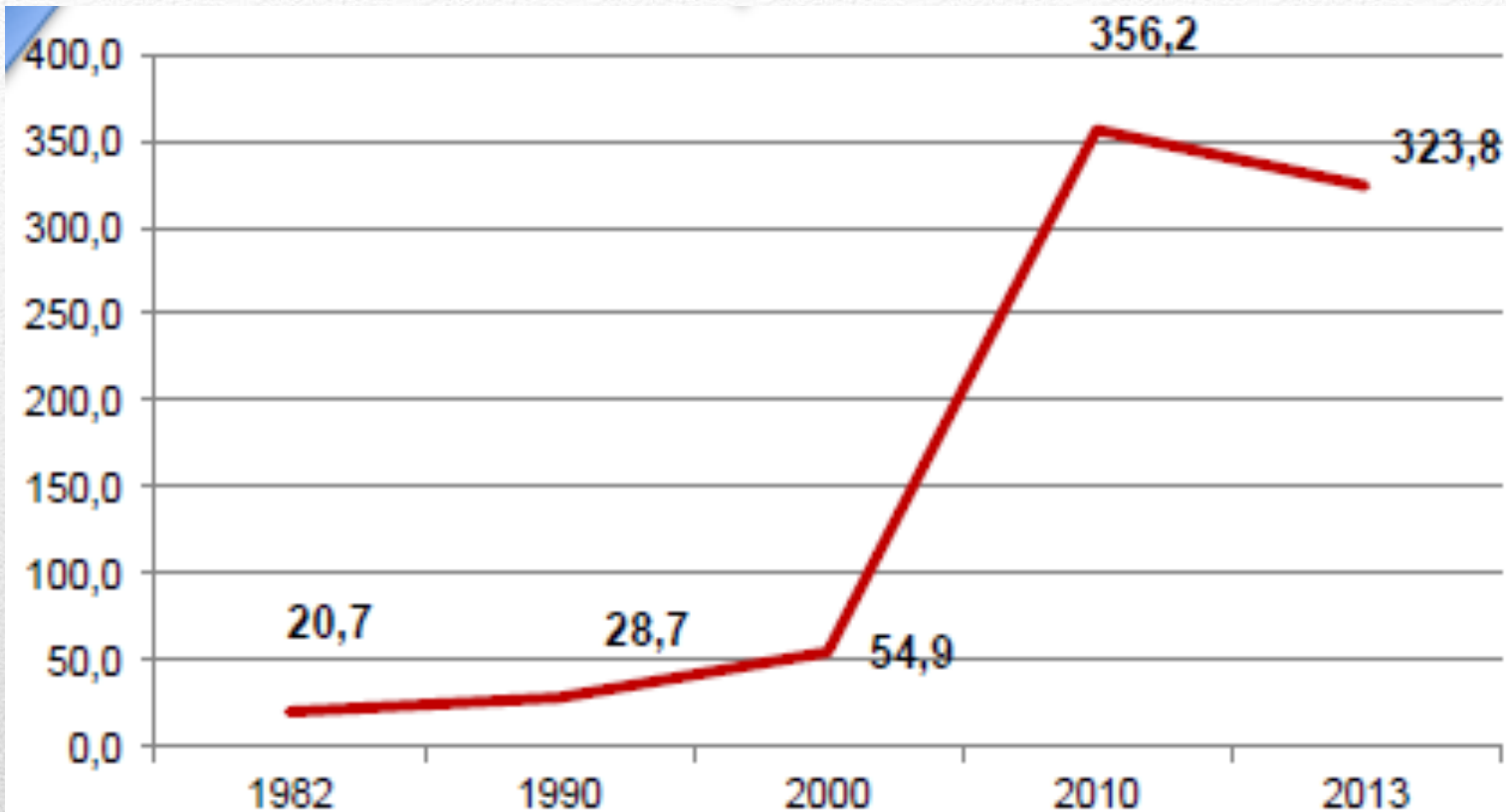
Source: BMEL (7: 2018)

The size of German farms is growing



CONCENTRATION TOWARDS THE TOP

In Belgium a concentration is taking place



In Italy the average number of pigs per farm is growing and a concentration is taking place, but in slaughtering there is a high fragmentation

- **Denmark: high level of social control in the sector due to the centuries-old cooperative movement. App. 13.000 people work in the pork market (33.000 with transport logistic and retail)**
- **Belgium: Meat sector employs app. 13.000 people. Unemployment is at 3.5% in the “pork regions” (Flanders) and yet the last collective agreement reduced the minimum wages in order to tackle outsourcing**
- **In Germany the pork market employs app. 114.000 people (140.000 with subcontractors). The minimum wage legislation and a collective agreement among major companies conditions increased, but subcontractors employees still face tough conditions for wages working time and health and safety**
- **Poland: the meat sector employs app. 118.000 people. The pork market is highly fragmented. Hence it is not easy to collect information about working conditions**
- **Italy: app. 6.000 people work in breeding and 50.000 in slaughtering and processing. High percentage of foreign workers. Subcontractors often avoid the application of the legal and collective agreements minimum standards**

Working conditions: a first overview



Thankx!
