

EU AGRICULTURAL OUTLOOK

FOR MARKETS, INCOME AND ENVIRONMENT 2022 - 2032

PROSPETTIVE AGROFOOD

UNIONE EUOPEA 2022 - 2032



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MEAT PRODUCTS



This chapter presents the drivers of EU meat markets and introduces projections for beef and veal, pigmeat, poultry, and sheep and goat meat. Sustainability and social concerns should take a more prominent role in shaping EU meat production and consumption. In this context, the most important outcomes that could be expected by 2032 include (i) lower per capita meat consumption, (ii) lower production based on more extensive and environmentally friendly systems, along with fewer animals or lower density. Poultry will be the only sector to expand in terms of production and consumption. However, spread of animal diseases, the aftermath of Brexit and certain free trade agreements under negotiation will be important factors. Moreover, the dependencies on global markets and current political events add further uncertainty and might alter the prospects for trade relations. While world consumption and import demand are expected to expand (except for pigmeat) opportunities for EU export growth should mostly benefit the poultry sector. EU prices, although generally higher, will continue to reflect changes in world prices.

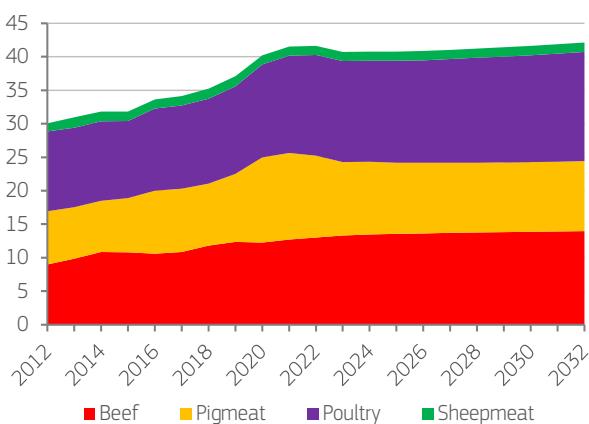


B ruxelles. The EU agricultural outlook, published once a year, presents the outlook for major EU agricultural markets, income and environment from now until 2032. It is based on a set of assumptions regarding macroeconomic conditions, the fixed agricultural and trade policy environment, and international market developments based on the latest OECD-FAO outlook. These assumptions imply relatively smooth market developments when in reality, markets tend to be much more volatile. Therefore, the outlook is not a forecast. More precisely, the projections correspond to the average trends agricultural markets are expected to follow in a given macroeconomic environment, if policies were to remain unchanged.

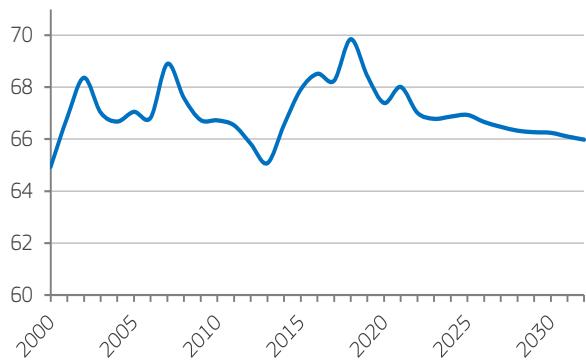
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DRIVERS OF MEAT MARKETS

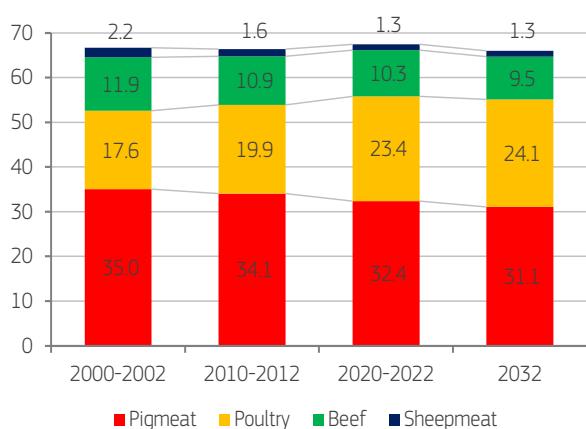
GRAPH 4.1 Global import demand (million t of carcass weight equivalent)



GRAPH 4.2 EU per capita meat consumption (kg)



GRAPH 4.3 EU per capita consumption by meat type (kg)



Global meat consumption and import demand to increase

By 2032, global meat consumption is expected to continue growing (+43 million t in 10 years), due to population growth and higher incomes, mainly in developing countries. A large part of the additional world demand will be met by domestic production. However, 1.8 million t of poultry and 1.3 million t of beef will need to come from increased global trade to cover the supply deficit in many countries. The EU will only benefit to a limited extent from this additional demand (mainly for poultry meat). The recovery of pigmeat production in China and the rest of Asia will play a determining factor for EU exports.

A greater awareness of sustainability in meat production and consumption

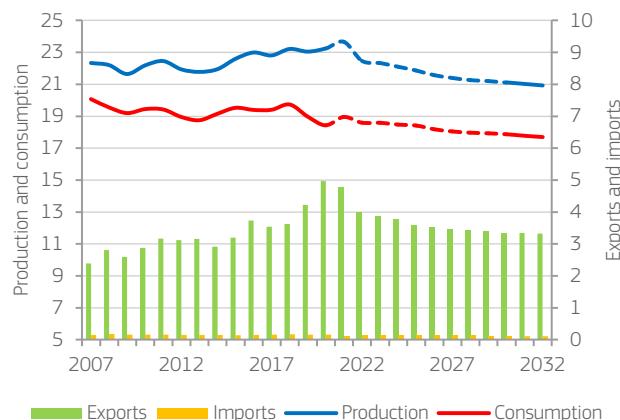
Sustainability will play an increasingly prominent role in EU meat markets for both producers and consumers. Although modernisation, innovative technologies and changes in farming practices could lead to more efficient and more environmentally friendly meat production, concrete investment decisions could remain a challenge given the uncertainty of the returns. Consumer concerns about the environment and climate change will result in more attention being paid to production processes and where meat products come from (e.g. local sourcing, organic and other quality schemes, animal welfare, deforestation and the environmental footprint). Other drivers changing consumer habits range from health considerations (lower or no intake of animal-based proteins) to convenience (with a shift from fresh meat towards more processed meat and preparations). The EU population will have fallen by 2032, and diets of older people (smaller portions) and young adults (less portions) include less meat. Cultivated meat is not expected to become a big competitor for meat in the next 10 years because of possibly lower consumer acceptance, price positioning and regulatory requirements. The shift to plant-based diets could lead to a growing number of protein alternatives to meat, but they are expected to continue having a very small market share.

EU per capita meat consumption drops to 66 kg by 2032

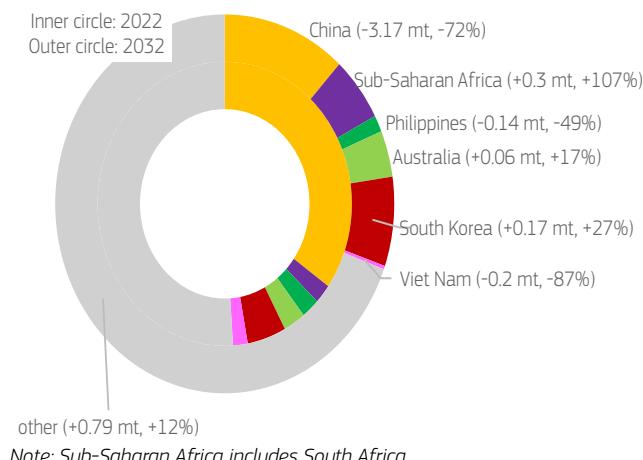
After a dip in consumption due to COVID-19 restrictions and the exceptional exports to China, EU meat consumption is set to further decline from a relatively low average compared to previous years (67.5 kg per capita in 2020-2022) to 66 kg by 2032 (-2.2%). This is unlike past decades when the EU experiences a gradual increase in meat consumption. The overall decline will be accompanied by a change in the consumer basket with an expected shift from some types of red meat (beef, pigmeat) to white meat (poultry). Sheep meat consumption is expected to stabilise due to its low availability and sustained demand despite relatively high prices.

PIGMEAT

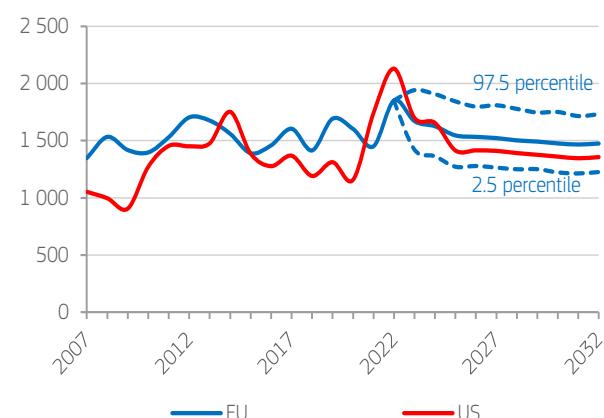
GRAPH 4.7 EU pigmeat market balance (million t)



GRAPH 4.8 Shares of selected pigmeat importers on global imports



GRAPH 4.9 Pigmeat prices (EUR/t) and uncertainty range



Pigmeat production to start declining

In the EU, health, environmental and societal concerns will continue affecting consumer preferences for different types of meat, and this will have a negative impact on EU pigmeat consumption. Apparent EU pigmeat consumption is projected to decrease by 0.4 % per year, from 32.4 kg per capita in 2022 to 31.1 kg in 2032 (- 4 % over the whole period).

Benefiting from excellent export possibilities to Asia despite African swine fever (ASF), the EU pigmeat sector increased production to 23.7 million t in 2021, but this then fell in 2022. While export opportunities should gradually shrink, ASF will have a lasting effect in the EU - a functional vaccine against ASF is not expected to be unavailable during the outlook period. In addition, intensive production systems are likely to face further societal criticism. Combined with stricter environmental laws in certain EU countries, these will have a serious effect on production. Therefore, EU pigmeat production is projected to fall by 1 % per year in 2022-2032 (2.2 million t over the whole period).

Pigmeat exports to decline as Chinese production recovers

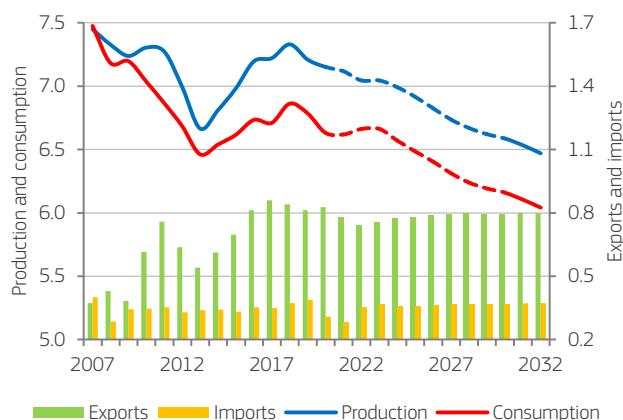
China's production capacity is expected to recover sooner than expected. It will therefore drastically reduce its reliance on imports, despite further ASF outbreaks still occurring. Other regions in Asia may take longer to recover. This has a massive impact on EU pigmeat exports which predominantly go to China. In addition, other EU export destinations like Japan, the Philippines and Vietnam are expected to reduce their imports by 2032. However, markets in South Korea, Australia, Sub-Saharan Africa or neighbouring European countries might create additional opportunities for EU exports. As a result, while EU exports increased by 2.8 % per year in 2012-2022, they are projected to decrease by -3.2 % per year in 2022-2032. The EU will also need to strengthen and diversify its export portfolio. Uncertainties remain about the speed of recovery from and trade bans due to ASF. Another possible risk is the spread of ASF to the American continent.

Pigmeat prices to remain contained

After the price spike in 2022, EU prices should decrease. However, import demand outside China, continuing outbreaks of ASF in Asia and an adjusting domestic production could slow down the decrease in prices until 2025. EU prices are then expected to remain around EUR 1 500/t until 2032.

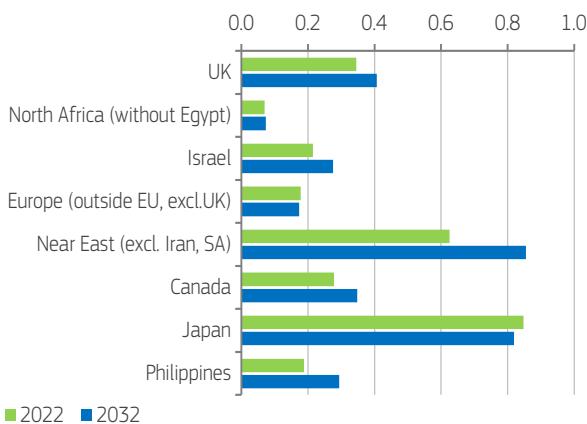
BEEF AND VEAL

GRAPH 4.4 EU beef and veal market balance (million t)



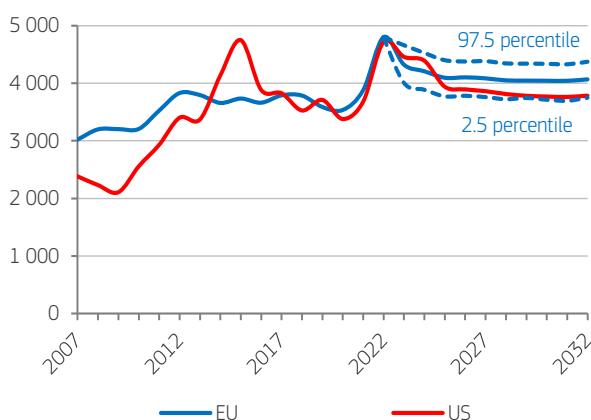
Note: Production corresponds to gross indigenous production; trade includes live animals.

GRAPH 4.5 Beef imports of main EU partners (million t)



Note: Total imports; countries cover 20 % of world demand.

GRAPH 4.6 Beef prices (EUR/t) and uncertainty range



Beef production and consumption continue to fall

EU gross beef production is expected to continue declining and fall by 0.6 million t (-9 %) in the next decade. At the same time, the total EU cow herd is set to decrease by 2.8 million head (-9.1 %). The dairy herd should decline progressively (see the chapter Milk), while the suckler cow herd is set to decrease to 9.9 million head by 2032 (-636 000 head or -6 %), due to low profitability and increasing environmental concerns. The overall decline hides opposing developments in different EU countries. Coupled income support and certain eco-schemes under the new CAP, together with a relatively good price outlook will only dampen this trend, not reverse it. The average slaughter weight will continue its slightly upward trend thanks to advanced technologies (e.g. management of germinal products) and a larger share of beef-type animals in the productive herd, while a shift to organic and more extensive production systems may partially counteract this trend.

After COVID-19, EU beef consumption continued decreasing in 2022 because of low availability and high prices. It should follow this downward trend during the next ten years. By 2032, per capita beef consumption may drop from 10.3 to 9.5 kg (-7.8 %).

Meat export gains offsetting the decline in exports of live animals

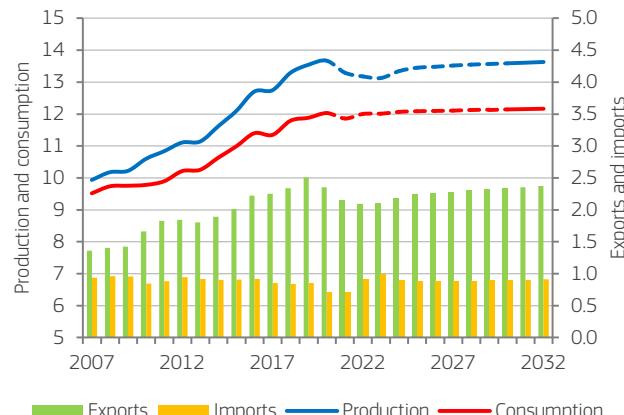
Global import demand for beef will increase by 1.3 million t between 2020-2022 and 2032. EU exports of live animals are expected to decline gradually (-2.8 % per year) due to increased competition and concerns about animal welfare in long-distance transport. EU meat exports are due to grow by 2032 (+1.1 % per year), mainly thanks to continuing or rising demand from existing trade partners. Future trade agreements between the UK and Australia/US (not accounted in this baseline) might change this picture drastically. However, the EU will keep exporting to high-value markets in neighbouring countries (UK, Switzerland, Norway) and in countries with whom the EU concluded FTAs recently (Japan, Canada). EU beef imports rebounded in 2022 after Brexit, the relaxation of the COVID-19 lockdown measures, the limited supply and the highly attractive EU price. In the coming years, imports will slowly increase and reach close to pre-COVID level by 2032.

Beef prices to stabilise around EUR 4 000/t

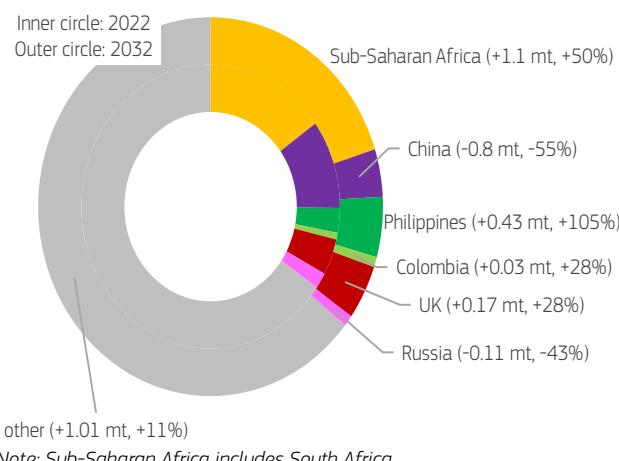
After the high beef prices in 2022, prices are expected to come down again due to more balanced supply and demand, and an expected cost reduction at EU and world level. So, it could stabilise at slightly above EUR 4 000/t, supported by high international demand.

POULTRY MEAT

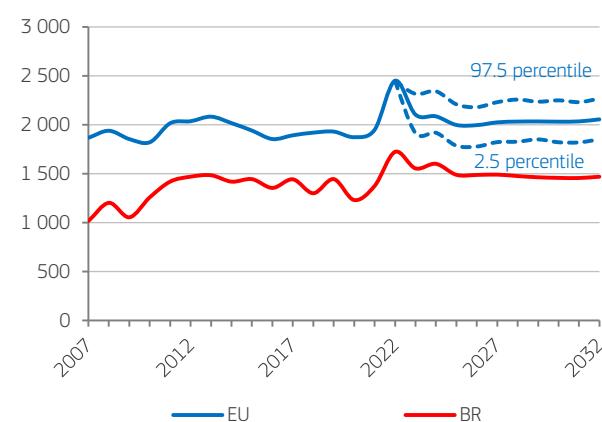
GRAPH 4.10 EU poultry meat market balance (million t)



GRAPH 4.11 Shares of selected poultry importers on global imports



GRAPH 4.12 Poultry prices (EUR/t) and uncertainty range



Poultry production to increase after drop in recent years, while consumption growth to slow

After the decrease in 2022, amid high input prices and outbreaks of highly pathogenic avian influenza (HPAI), EU poultry production is expected to recover during the Outlook period (+0.2 % per year), albeit with slower growth than in the past decade (2 %), mainly due to environmental restrictions and changes in consumption. Unlike previous years, the incidence of HPAI extends over the whole year instead of being a seasonal event, which will challenge the sector and more particularly the free-range production systems in the EU.

The growth in EU poultry consumption will slow from 1.9 % per year in 2012-2022 to 0.2 % in the next decade. Nevertheless, this still translates into an increase in per capita consumption from 23.4 kg to 24.1 kg (+3 % over the next decade). That stems from a healthier image of poultry compared to other meats (especially pigmeat), greater ease of preparation, the absence of religious constraints regarding its consumption and its relatively cheaper price.

Poultry trade to recover slowly

EU poultry exports showed a dynamic expansion until 2019, with the main products exported being those less in demand in the EU (wings, legs, and offal). However, COVID-19, HPIA outbreaks and high domestic prices created challenging conditions for EU poultry exports and that trend was halted. By 2032, exports will recover slowly by 0.8 % per year, reaching a level of 2.4 million t, especially thanks to increasing demand from Sub-Saharan Africa, the Philippines and the UK.

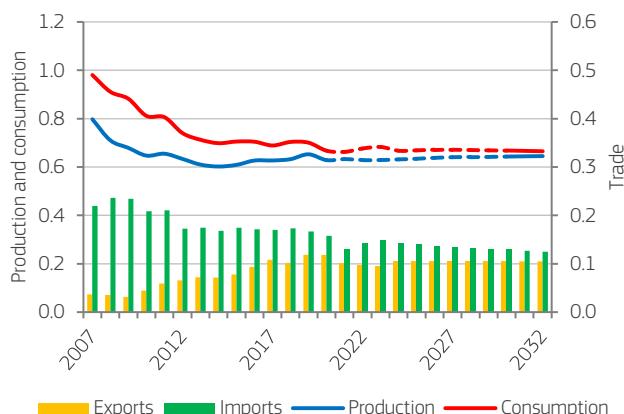
EU poultry imports, mostly supplying foodservice and food processors, recovered quickly in 2022, also due to the duty-free quota-free agreement with Ukraine (valid till June 2023). Without this preferential access to the EU market, imports should fall back to pre-COVID levels before increasing slowly to a level of 910 000 t by 2032.

Poultry price to stabilise above pre-COVID level

After the spike in 2022, the EU poultry price is expected to decrease and stabilise at around EUR 2 000/t by 2032, above the pre-COVID price level, mainly thanks to sustained demand in the EU. The price gap with Brazil will continue, which makes competing on the same ground almost impossible.

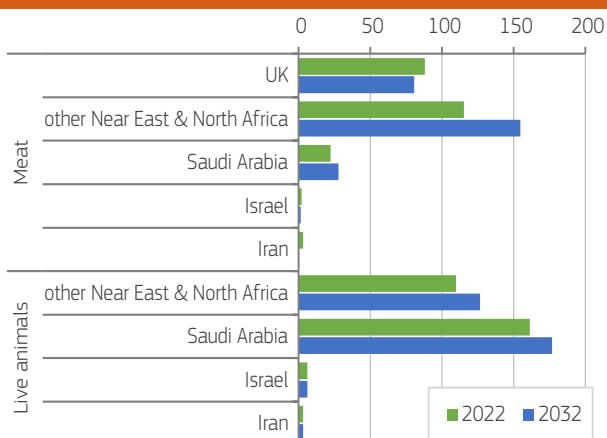
SHEEP AND GOAT MEAT

GRAPH 4.13 EU sheep and goat meat market balance (million t)

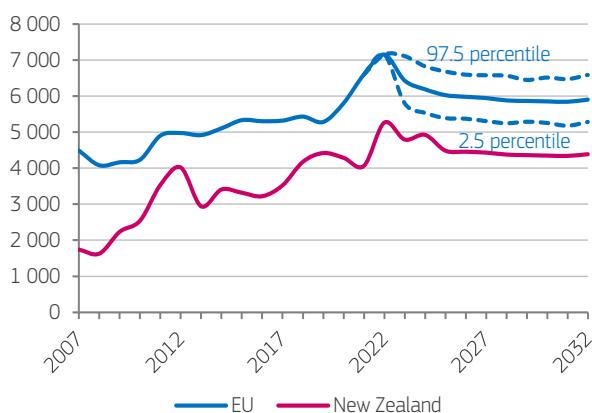


Note: Production corresponds to gross indigenous production; trade includes live animals.

GRAPH 4.14 Sheep imports of key EU partners (1000 t)



GRAPH 4.15 Sheep meat prices (EUR/t) and uncertainty range



Production and consumption rise slightly

Contrary to declining trend of recent years, EU sheep and goat meat production is expected to increase slightly by 0.2 % per year until 2032 (up to 645 000 t). This is mainly driven by a continuing increase in the EU-13 (0.7 % per year). Coupled income support, a tight global supply-demand situation and favourable prices for producers should support this trend. Production will remain concentrated in a few EU countries, with slaughtering in Spain, Greece, France, Ireland and Romania representing more than two thirds of total EU production in 2021.

EU per capita consumption is expected to remain relatively stable by 2032 (around 1.3 kg per year). This is thanks to the diversification of meat diets and sustained consumption patterns in the EU population (due to religious tradition and migration). In general, sheep meat consumption is less sensitive to price changes and more affected by peaks in seasonal demand related to religious celebrations.

Imports fall due to less Asian demand while meat exports to Near and Middle East could rise

EU exports of live animals are expected to decline by 2032 to 45 000 t (-17.5 % compared to 2022). This is mainly due to concerns about animal welfare during long-distance transport and financial risks of certain export destinations. After 2 years of low exports due to Brexit and high domestic prices, EU meat exports are expected to catch up in 2023-2024 and reach 60 000 t by 2032 based on a consolidation and further expansion of trade with partners in the Near and Middle East. UK imports currently represent almost half of EU meat exports and should remain stable at most. There is a lot of uncertainty on the possible impact of trade agreements between the UK and Australia/New Zealand on EU exports and UK exports to the EU. EU imports will recover in the short run and slightly decline to 125 000 t by 2032. Even though the EU is still an attractive export destination, Australia and New Zealand will focus more on Asian markets, given its easier access. While Australia should fill its EU tariff rate quotas, New Zealand's production capacity is not expected to be able to serve both the Asian and EU markets despite productivity gains.

Prices to remain above pre-COVID level

After high prices in 2021 and 2022, EU prices are to start a downward trend but are likely to remain significantly higher than before COVID-19. A big gap between EU prices and prices in New Zealand and Australia will remain. This reflects the lower production and labour costs in these two countries. There is also less pressure from the global market on these countries than on the EU.

Carne sintetica, le “minacce” arrivano dall’Europa

I sostenitori dei “cibi Frankenstein” vogliono cancellare gli allevamenti per impedire le emissioni di metano degli animali, che ben poco hanno a che fare con il cambiamento climatico.



Il Cibo che verrà; NO all'alimentazione sintetica



A sx; il Ministro Francesco Lollobrigida, "Mai Carne Sintetica in Italia; a rischio la cultura agroalimentare del Paese"

A dx; Bill Gates, primo sponsor per il cibo sintetico



Mangeremo carne sintetica? NO grazie

Bрюссель. Il rischio di trovarsi sul piatto, già a breve termine, carne prodotta sinteticamente, è più che reale. Nonostante, dall'altra parte, arrivino comunque rassicurazioni dal Governo, che ribadisce la propria contrarietà. A denunciare la situazione è un servizio de “La Verità”, che scrive: “Il paradosso è che mentre la Food & drug administration americana dà il via libera alla carne sintetica non eccependo su un pollo prodotto in laboratorio, l'India, dove la religione indù impone il rispetto delle vacche sacre, fa togliere, d'accordo con Nuova Zelanda e Kenia, dal rapporto Ipcc (il Gruppo intergovernativo sul cambiamento climatico, ndr), ogni riferimento al menu vegano. Il documento a corredo di Cop 27 (l'adunata per il clima risoltasi in un flop mondiale) evocava la necessità di «diete a base vegetale», ma dopo il no di indiani, kenioti e neozelandesi l'hanno scritto così: «Servono diete sane equilibrate e sostenibili» nell'accertata convinzione che mangiare solo verdure a fini di protezione del clima non serve a nulla, ma è la foglia di fico dietro cui si riparano i grandi inquinatori. Un problema per i sostenitori della carne sintetica che vogliono cancellare gli allevamenti per impedire le emissioni di metano degli animali. Soprattutto in Italia, l'argomento clima non regge: la zootecnia ha ridotto l'impatto del 50% in venti anni e l'agricoltura genera solo l'8% delle emissioni. Eppure questo dei campi, e soprattutto delle stalle, nemici dell'ambiente è il motivo per cui l'Europa insiste nel voler cancellare la zootecnia e farci mangiare i cibi Frankenstein come la carne sintetica, che arriveranno sul mercato da qui a tre anni. Non è un caso che Ursula von der Leyen, presidente della Commissione europea, sia andata a rendere omaggio a Bill Gates primo sponsor e investitore nella carne sintetica, né che Frans Timmermans, vicepresidente dell'Ue, insista per chiudere le stalle. In Olanda, nella sua Olanda, rischia la rivolta visto che lì si produce la maggior quantità di carne d'Europa - un settore che vale il 40% del fatturato agricolo, circa 180 miliardi e impiega nel continente quattro milioni di persone - ma Timmermans non



Ursula Von Der Leyen e Frans Timmermans Presidente e Vice Presidente Unione Europea. Si fatica a comprendere come mai la Commissione Europea non prenda una netta posizione contro la carne sintetica, favorendo le tradizioni secolari del cibo sano a naturale dei Pascoli dell'Europa

molla perché si è fatto finanziare dall'Ue le start-up sulla carne e il latte sintetico che hanno casa ad Amsterdam. Il primo a metterci i soldi è Jitse Groen, il fondatore di Just eat, che sta finanziando Mosa meat che produce carne sintetica tra i tulipani. È uno scontro durissimo quello che si sta combattendo in Europa: e la ragione non sono né l'ambiente, né la salute (come vorrebbe far credere la Beca, la commissione Salute dell'Ue che bolla la carne rossa come cancerogena), ma sono i soldi. Un recentissimo report stima che da qui al 2035 il 22% delle proteine nel mondo sarà consumato attraverso cibi che imitano le carne, per un valore di 290 miliardi di dollari. Già oggi in Italia le imitazioni «vegetali» valgono mezzo miliardo. Le start up sulla carne sintetica sono passate da 600 milioni di dollari investiti nel 2018 a 4,5 miliardi di dollari dello scorso anno. Per



Al centro Ettore Prandini, presidente Coldiretti, insieme all'associazione "Pediatrici Italiani" e "Filiere Italia". Tutti contrari alla carne sintetica



vincere la guerra delle proteine, sono stati mobilitati 25 miliardi di dollari in comunicazione a livello mondiale, insistendo su tre argomenti: la salute del pianeta, la salute degli umani, la crudeltà sugli animali. Parole d'ordine recepite nei programmi di Bruxelles. Il dossier The protein transformation, elaborato da Bcg, prevede che si passerà, nell'arco di dieci anni, dagli attuali 13 milioni di tonnellate di alimenti succedanei della carne oggi prodotti a 97 milioni di tonnellate e che l'Europa sarà il primo mercato per le proteine alternative. La prova è il Farm to fork, il programma (non) agricolo europeo che, di fatto, vuole ridurre del 30% la produzione continentale (per quanto riguarda la zootecnia, se ne prevede il dimezzamento) compensandola con massicce importazioni. La Francia, intanto, ha vietato per legge di etichettare come carne qualsiasi prodotto non zootecnico, ma la resistenza più dura e intelligente la sta facendo l'Italia. Il neo ministro per l'Agricoltura e la sovranità alimentare,



Wolfgang Gelmann, Direttore Scientifico EFSA



Giuseppe Pulina, Presidente di Carni Sostenibili

Francesco Lollobrigida (FdI), ha dichiarato: «Finché saremo al governo, sulle tavole degli italiani non arriveranno cibi creati in laboratorio. Il governo è contrario a cibo sintetico e artificiale e ha intenzione di contrastare in ogni sede questo tipo di produzioni». La Coldiretti, con Filiera Italia, ha lanciato una sottoscrizione per bloccare la carne sintetica, forte anche di un sondaggio - sottolinea il presidente Ettore Prandini - secondo cui «il 75% degli italiani è contro i cibi Frankenstein». Tuttavia, l'Europa non molla. Il direttore scientifico dell'Efsa - l'Ente europeo per la sicurezza alimentare -, che ha sede a Parma dove dalle vacche si fa il Parmigiano reggiano e dai maiali il prosciutto di Parma, Wolfgang Gelmann, ha dichiarato: «Credo che la carne sintetica arriverà presto anche in Europa. Personalmente non ho alcuna preclusione verso questi prodotti. Per ora non ci sono richieste di autorizzazione per questi novel food, ma credo che entro tre anni chi fa cibi sintetici ci chiederà l'accesso al mercato». Gelmann non è lontano dalle posizioni di Uma Valeti, ad di Upside food, l'azienda del finto pollo americano, che sostiene: «Questa è una pietra miliare che segna una nuova era nella produzione della carne». Non è d'accordo il professor Giuseppe Pulina (Università di Cagliari), presidente dell'Associazione carni sostenibili, che ha aderito alla dichiarazione di Dublino. È un manifesto in cui centinaia di scienziati di tutto il mondo si impegnano



Carne Sintetica? NO grazie; meglio una bistecca di cavallo, nutriente, gustosa e povera di grassi. Ottima per grandi e bambini.



a «ripristinare una verità scientifica, come antidoto alle pericolose fake news che inquinano l'informazione e impediscono di guardare con lucidità al futuro del comparto». Dice Pulina: «L'impegno è raccogliere evidenze scientifiche sui benefici nutrizionali, ambientali ed economici della zootecnia e proporre soluzioni per migliorare e rendere ancora più sostenibile la filiera della carne».

APPROVATO DALLA COMMISSIONE IL PIANO STRATEGICO DELLA PAC ITALIANA

La Commissione europea ha approvato il piano strategico della PAC dell'Italia. La nuova politica agricola comune entrerà in vigore il 1° gennaio 2023, e si concentrerà principalmente sulla transizione verso un settore agricolo europeo sostenibile, resiliente e moderno. I finanziamenti saranno distribuiti in modo più equo tra le aziende agricole, con particolare attenzione alle PMI, nonché ai giovani agricoltori; gli agricoltori saranno inoltre aiutati ad intraprendere la strada dell'innovazione.

La PAC beneficerà di 270 miliardi di euro di finanziamenti dell'UE per il periodo 2023-27. Il budget stimato per il piano strategico dell'Italia è di 26,61 miliardi. Il piano strategico della PAC italiana è consultabile integralmente, in lingua inglese su eu commissioni. ■



Carne Sintetica? NO grazie; meglio una bistecca Sashi Beef Lover, proteine dal sapore raffinato