



Irish & EU Beef & Livestock Market Outlook

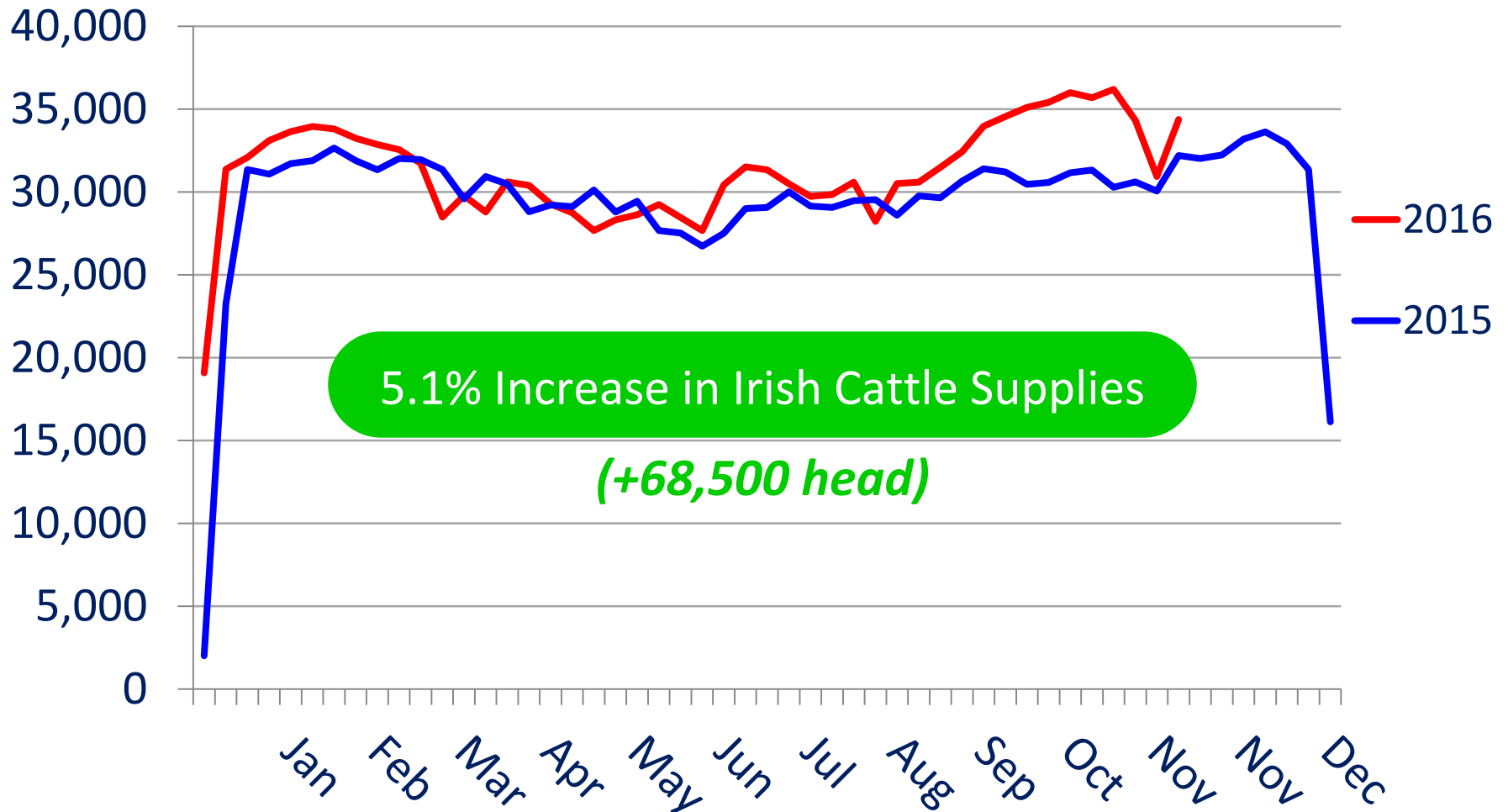
Joe Burke

November 2016

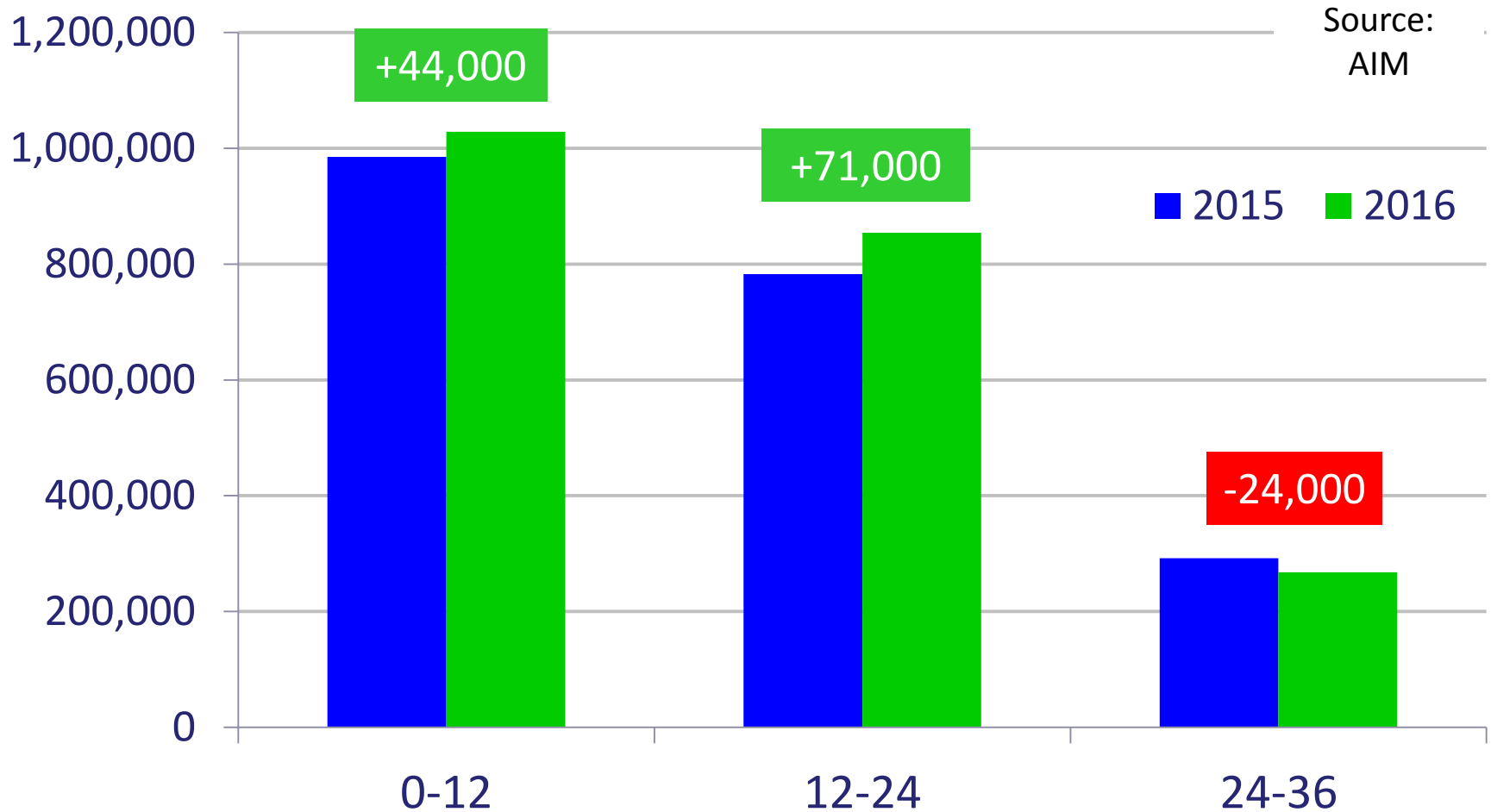
Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

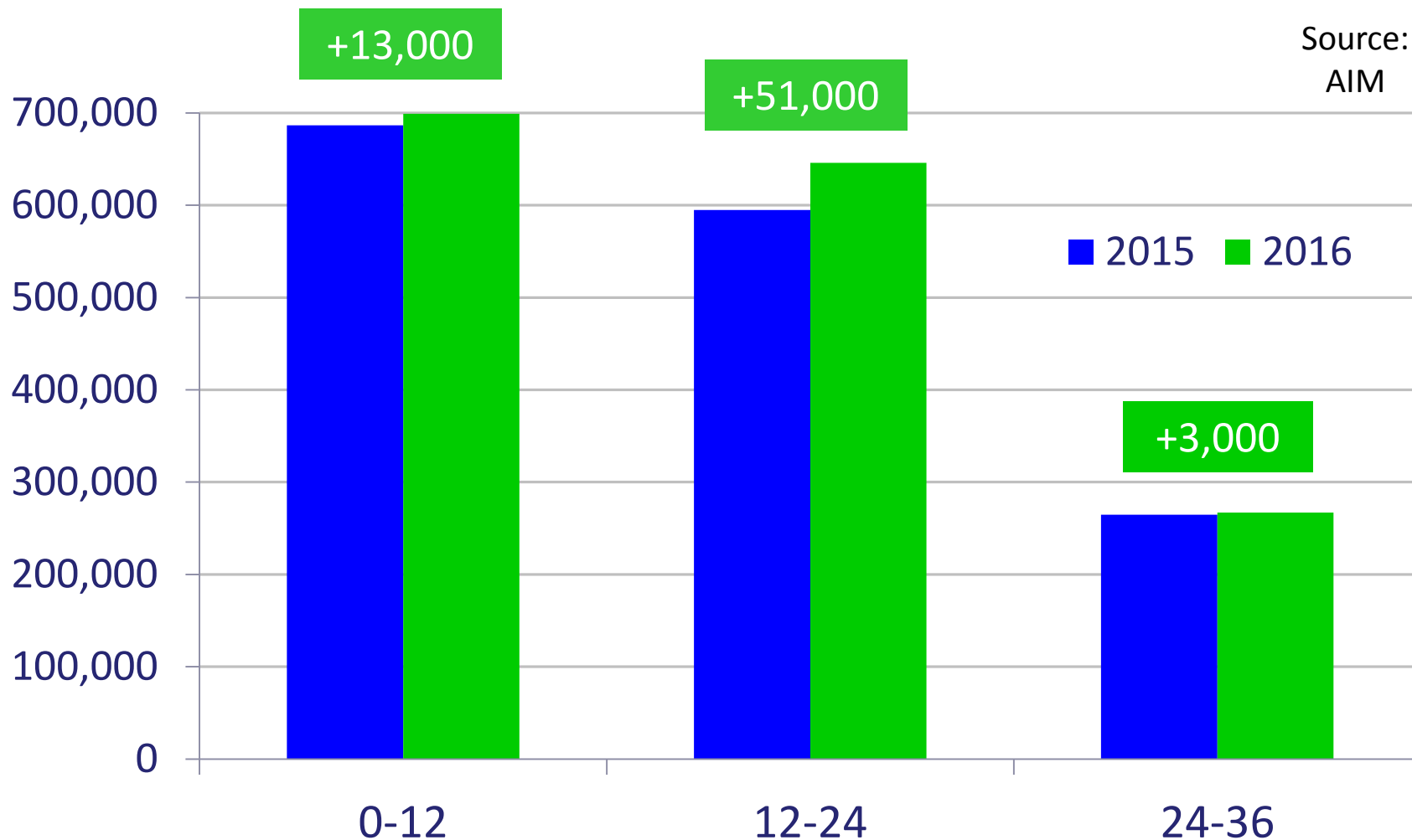
Irish weekly finished cattle supplies (head)



Male Cattle Numbers by Age Category on 1st of September

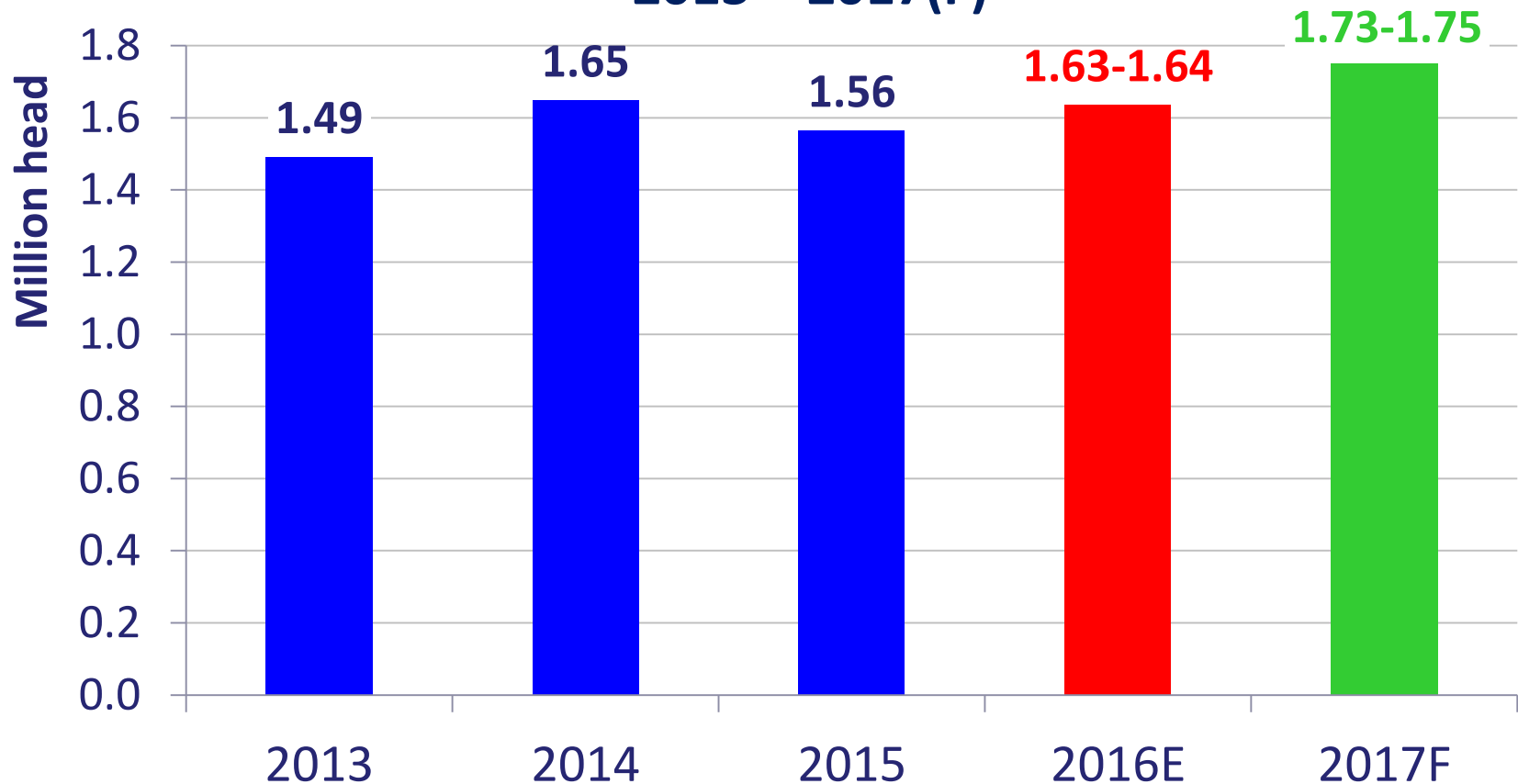


Female Beef Cattle No.s by Age Category on 1st of September



Finished Cattle Supplies – Export Meat Plants

2013 – 2017(F)



2017: 100-120,000 additional finished cattle likely

Live Cattle Exports 2016

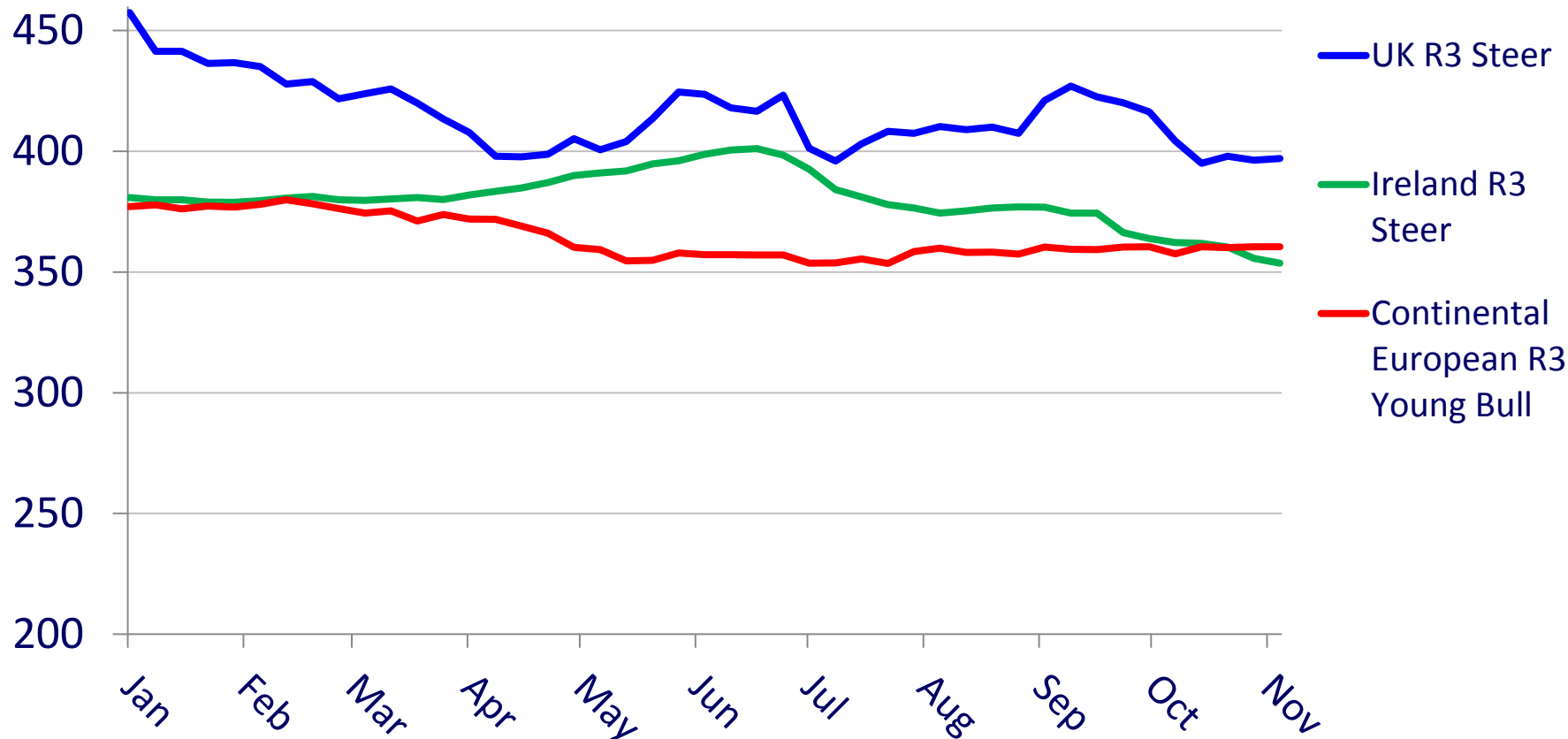
Distribution of Live Exports from Ireland up to w/e. 5th November



(head)	2015	2016	% change
Total	163,547	124,059	-24%
NI	46,759	20,922	-55%
GB	8,086	5,823	-28%
Italy	22,038	17,259	-22%
Spain	28,755	35,848	+25%
Netherlands	43,624	26,937	-38%
Belgium	473	328	-31%
France	8,503	5,854	-31%
Other EU	1,253	2,443	+95%
Int. mkt.s	4,056	8,645	+113%

Producer Prices: Ireland vs. Continental EU

(c/kg excl VAT)

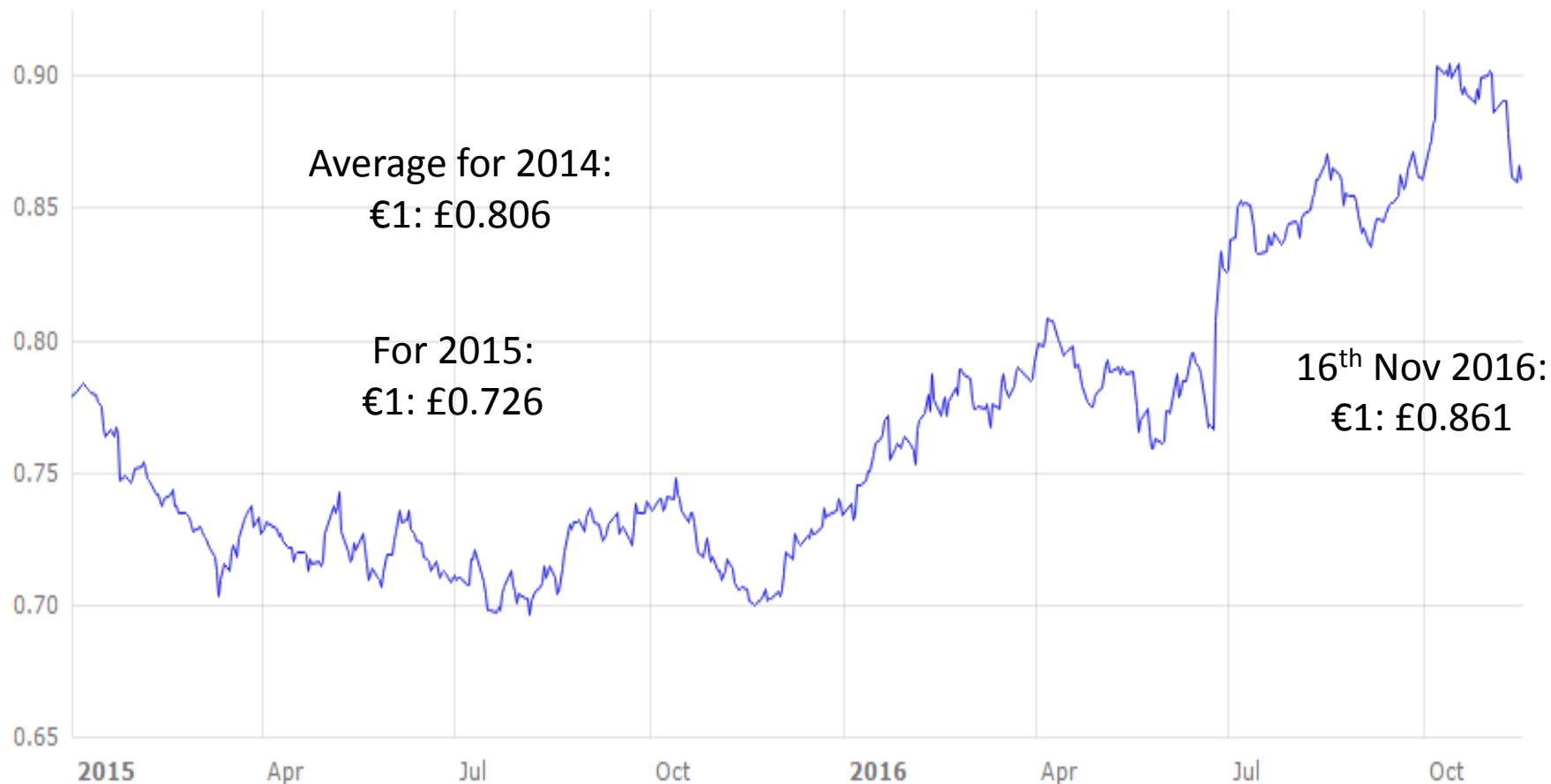


(w/e 05/11) Irish Price €3.54/kg vs. UK €3.95 vs. Continental EU av: €3.60/kg

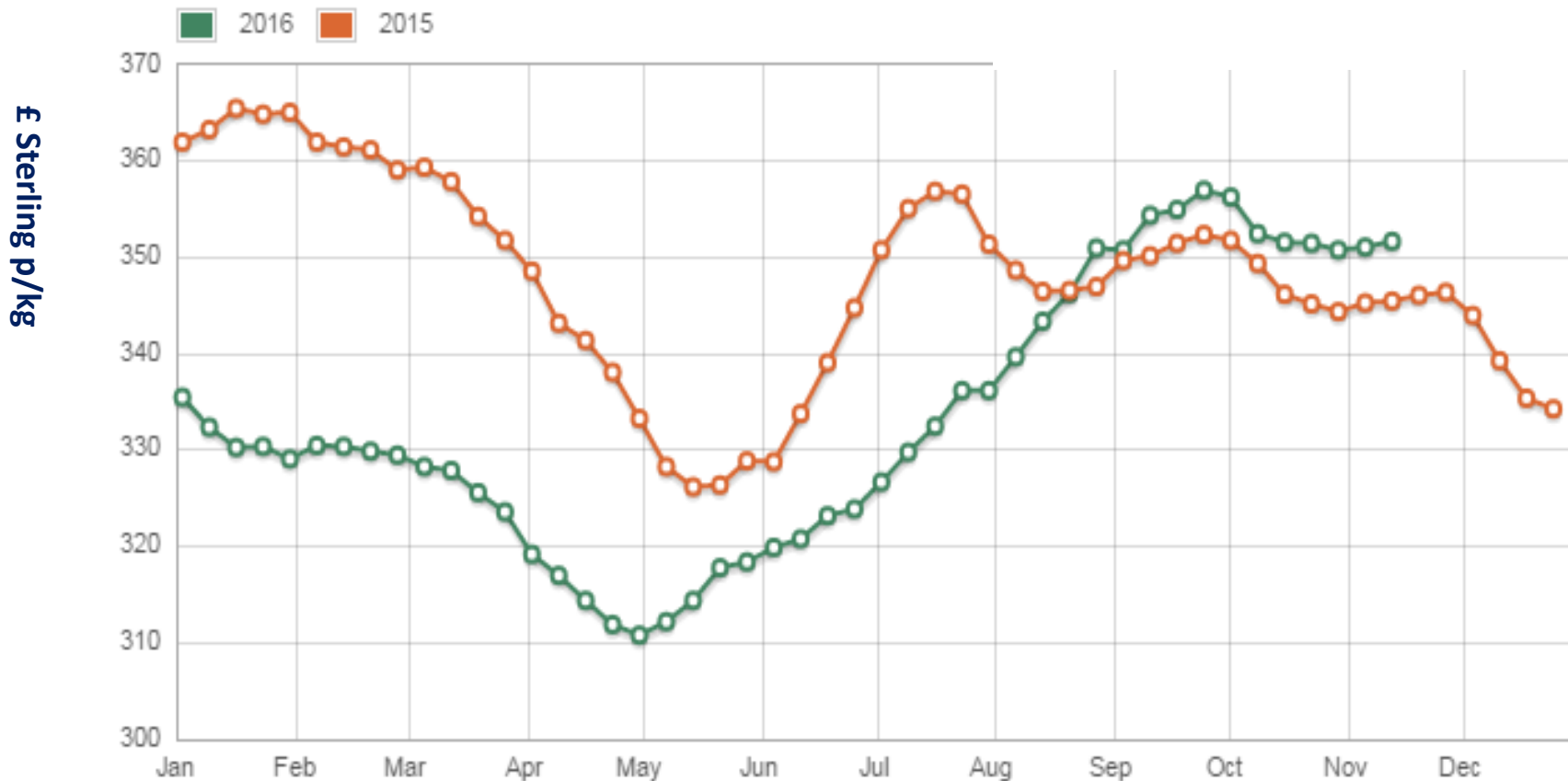
In Italy, R3 young bull price: €3.72/kg, Spain: €3.63, France: €3.57, Germany €3.74

Currency Exchange Rates

Value of Euro in Sterling terms



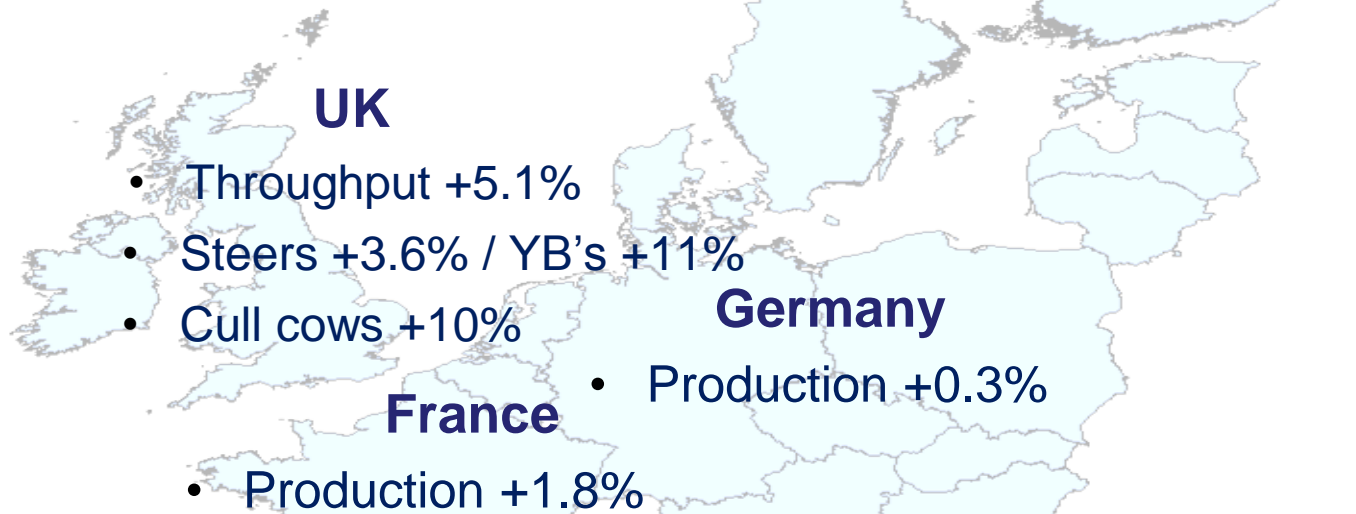
British Cattle Price Development in Sterling terms



Last week: GB R3 steers average £3.61 @ 88.2p = €4.09/kg

European Markets

Cattle Supplies 2016



EU Beef Production 3.5% higher
(EU Commission)

-
- A map of Europe with callouts for Spain and Germany, detailing their cattle supply changes for 2016. The Spain callout lists throughput, live imports, and live exports. The Germany callout lists production and live imports.
- Spain**
 - Throughput +5%
 - Live imports +10%
 - Live exports -15%
 - Germany**
 - Production N/C.
 - Live imports +3%

Source: EU Commission beef forecast working group

EU Beef Retail Sales / Consumption 2016

Home Market
(12 wks to mid-Oct)
Volume: +3.1%
Av Price: -0.7%

Britain
(12 wks to mid-Oct)
Volume: -1.5%
Av Price: -4.3%

Netherlands
(EU Forecast)
Volume : +1.8%

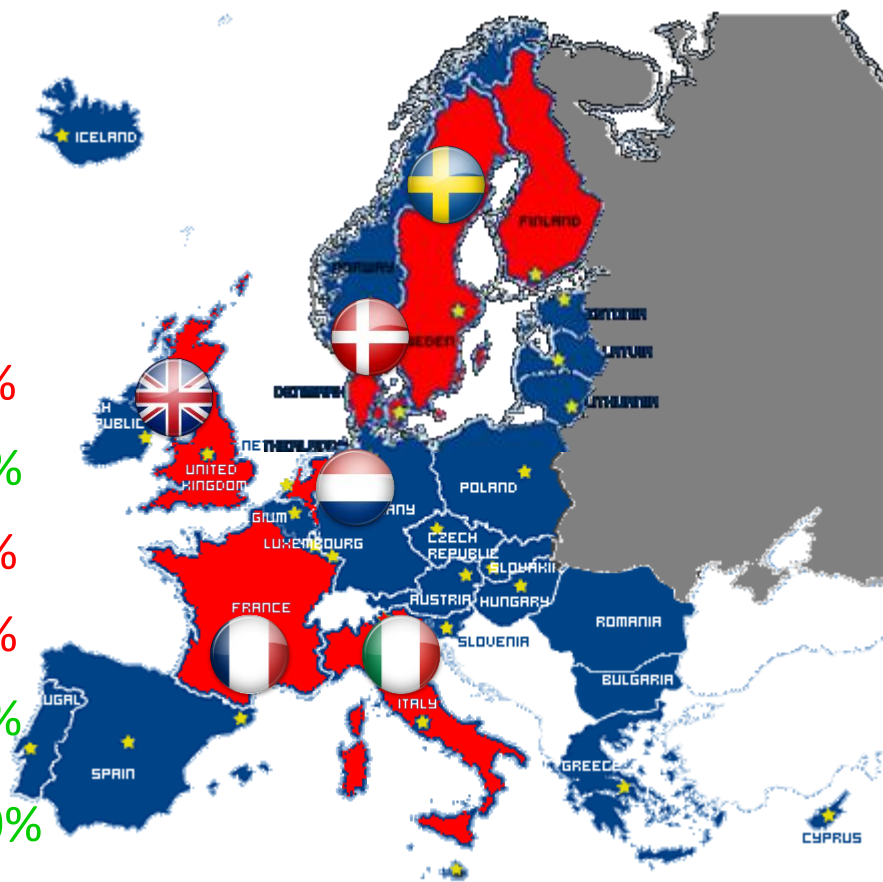
France
(Jan to mid-Sept)
Volume: -0.8%
Av Price: +2.3%

Germany
(EU Forecast)
Volume : +1.1%

Italy
(EU Forecast)
Volume : -1.1%

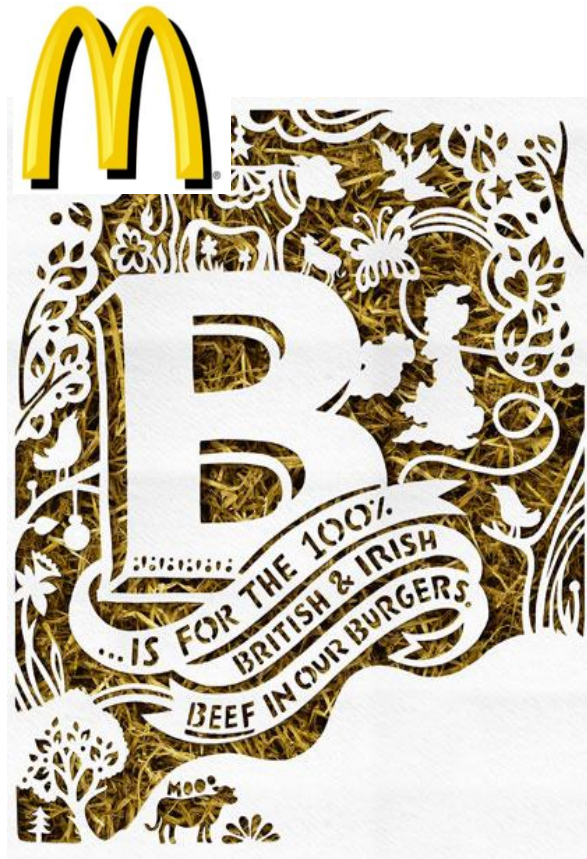
Irish Beef Markets 2015

- Exports 510,000 T
- UK 54% / 275,000 T -2%
- EU 42% / 220,000 T +1%
 - France 52,000 T -1%
 - Netherlands 40,000 T +5%
 - Italy 38,000 T -1%
 - Scandinavia 42,000 T -3%
 - Germany 24,000 T +10%
- International 3% 15,000 T +140%



Source: CSO / Bord Bia Estimates

UK: Maintaining Profile in Retail and Foodservice



TESCO



ASDA



**MILLER & CARTER
- STEAKHOUSE -**

THE BEST OF BRITISH AND IRISH BEEF

Our premium - graded beef is sourced from carefully selected cattle reared on sustainable British and Irish farms.

It's then matured for at least 30 days, hand-prepared by our master butcher and expertly cooked by our chefs – for you to savour however you choose to. Though we're never short of a few **recommendations**.

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Irish Food Board

OUR PARTNERSHIP WITH GREAT BRITISH CHEFS
HAS PROVIDED AN ADDITIONAL

1,005,953
VIEWS



GREAT
BRITISH
CHEFS

THIS IS MADE UP FROM:

Web page
editorial views
53,807



Advertising
736,207



Social
215,939



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GERMANY

Driving Awareness and building premium positioning



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Netherlands

Maintaining Image based on Quality, Environment and Welfare attributes



**Ierse stoofpotjes.
Het wachten waard!**

**Probeer de
heerlijkste stoofpotjes.**

 1.30	 2.30	 6.00
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Waar wacht je nog op?



**Lekker stoven
MET IERS RUNDVLEES**

Het perfecte gerecht om tijdens de koude wintermaanden van te genieten: een heerlijk stoofpotje met Iers rundvlees. Supereenvoudig te bereiden en je krijgt het er lekker warm van. Een stoofpotje mag dan een wat langere bereidingstijd hebben, maar is het wachten zeker waard! Het langzame kookproces geeft het vlees veel smaak en malsheid. Grasgevoerd rundvlees van Ierse ossen en vaarzen bevat bovendien veel onverzadigde vetten die zorgen voor de volle, intense smaak die een stoofpotje zo bijzonder maken. Je vindt Iers rundvlees gewoon in de supermarkt en bij de slager.

Ga naar irishbeef.nl voor meer informatie en mooie recepten.

Chefs Irish Beef Club

84 Michelin-starred chefs acting as ambassadors for Irish beef across 8 markets



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CHINA & SOUTH-EAST ASIA

EU Funded Campaign



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