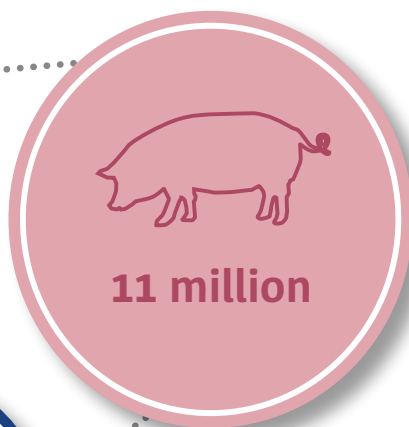


BELGIAN MEAT

Facts & Figures 2018



In **Belgium** 11 million pigs,
and 550,000 cattle
are slaughtered annually.

London: 332 km
 Brussels
 Paris: 309 km
 Amsterdam: 211 km
 Berlin: 781 km
 Frankfurt: 392 km
 Poznan: 1,018 km
 Warsaw: 1,341 km
 Kiev: 2,100 km
 Budapest: 1,370 km
 Rome: 1,391 km

The heart of Europe

- Population: 11.35 million
- Capital: Brussels

Herd in Belgium

- 2017 Herds
 Pigs: 6,108,077,
 Cattle: 2,385,988
- Flanders (the northern region of Belgium) produces 94% of total pork production and 78% of total beef production in Belgium.

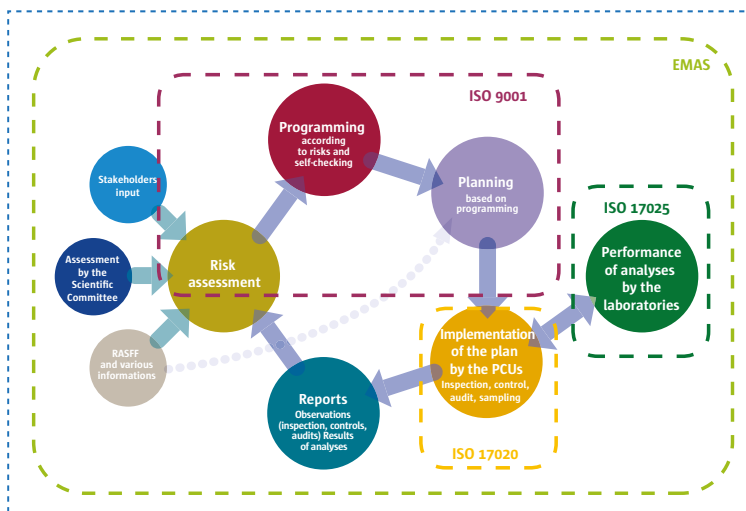
About Belgian meat and Belgian Meat Office

The Belgian meat sector specializes in pork and beef. Since decades Belgian pork and beef is exported to many countries in the world. Over the generations, Belgian meat producers became real export specialists, meeting the needs of customers in over 60 countries.

The **Belgian Meat Office** coordinates pork and beef export activities. This meat export agency was founded in 2003 under the Flanders' Agricultural Marketing Board (VLAM) umbrella.

NO. 1 IN EUROPEAN MEAT MONITORING

Belgium is one of the leading meat exporters in Europe and is also a leader with regard to food safety. The concept of risk management and its use by Belgian companies is widely recognised across Europe.

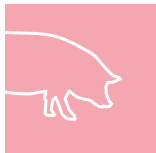


INTENSIVE INSPECTIONS FROM THE FEED TO THE END USER

In Belgium the safety of the entire food chain comes under the authority of the Federal Agency for the Safety of the Food Chain (FASFC - an independent agency). This is a unique feature in Europe. The FASFC incorporates all public health and agriculture inspection departments and monitors the compulsory self-audit systems of operators & the excellent traceability of their products.

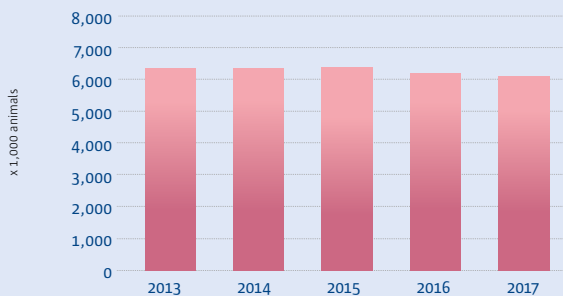
PRODUCTION

Herd



PIG HERD BELGIUM

In 2017 the Belgian pig herd shrank by almost 70,000 pigs compared to 2016, dropping to 6.1 million.

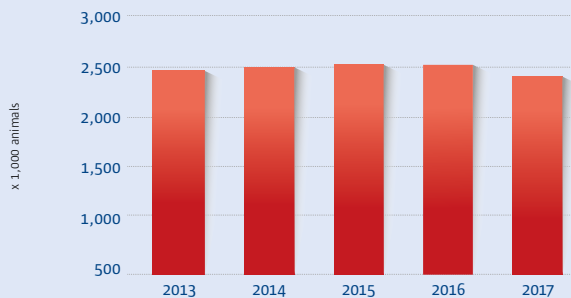


Source: Eurostat



CATTLE HERD IN BELGIUM

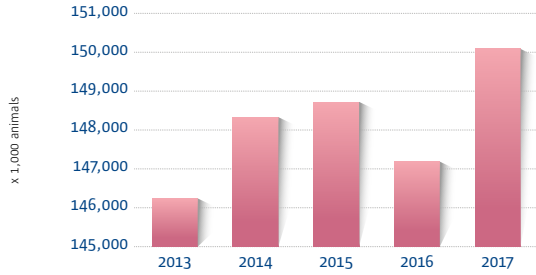
In 2017 the Belgian cattle herd shrank by almost 115,000 animals compared to 2016, dropping to 2.4 million.



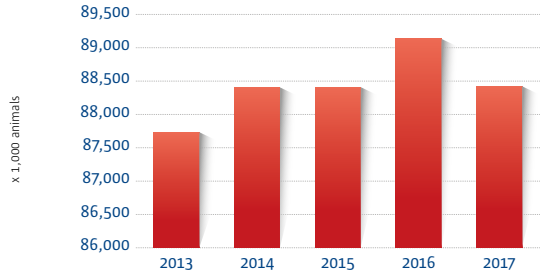
Source: Eurostat



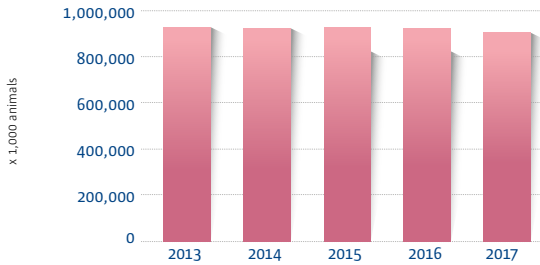
PIG HERD EU28



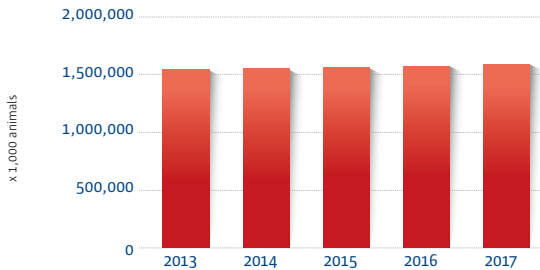
CATTLE HERD EU28



PIG HERD WORLD



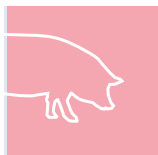
CATTLE HERD WORLD



Sources: EU28: Eurostat - world: USDA

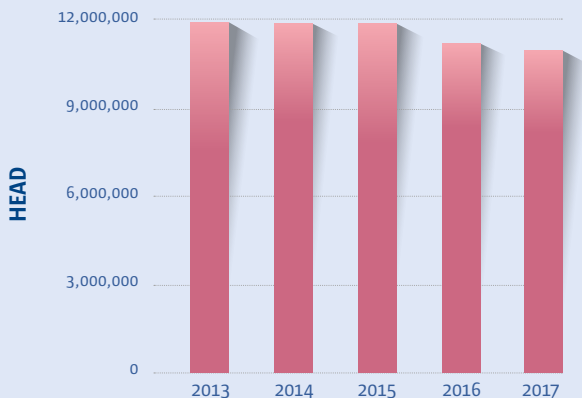
PRODUCTION

Slaughterings (number and production)



PIG SLAUGHTERINGS IN BELGIUM

In 2017 the number of pig slaughterings sank to 11 million, around 230,000 slaughterings less, in comparison to 2016.

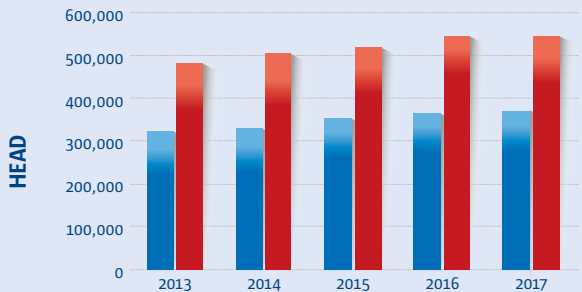


Source: Statistics Belgium by FASFC



CATTLE AND VEAL SLAUGHTERINGS IN BELGIUM

In 2017 the number of cattle slaughterings rose to almost 550,000 animals. The calf slaughterings increased as well to 371,000.



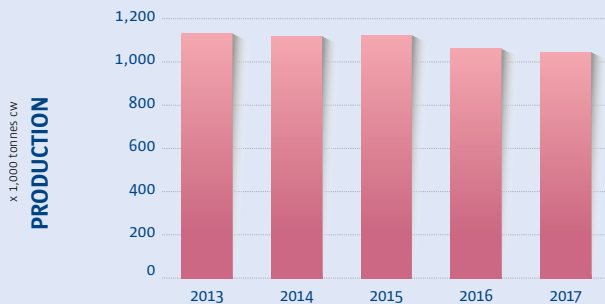
Source: Statistics Belgium by FASFC





PIG SLAUGHTERINGS IN BELGIUM

The production of pork fell slightly in 2017 and amounted to 1.04 million tonnes. This led to a 1.5% decrease compared to 2016.

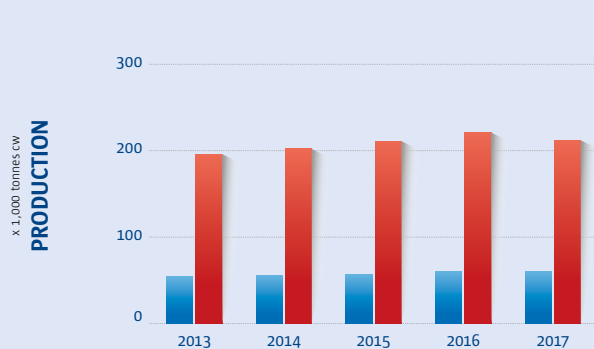


Source: Statistics Belgium by FASFC



CATTLE AND VEAL SLAUGHTERINGS IN BELGIUM

The beef production fell slightly in 2017 to 212,000 tonnes. In 2017 the production of veal amounted to 60,000 tonnes and remains therefore stable compared to the previous year.



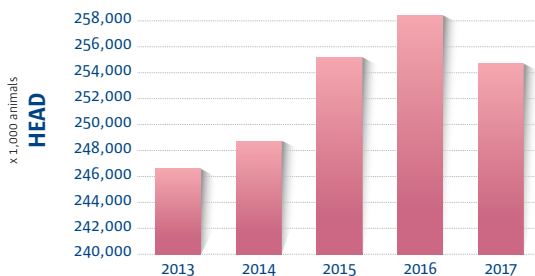
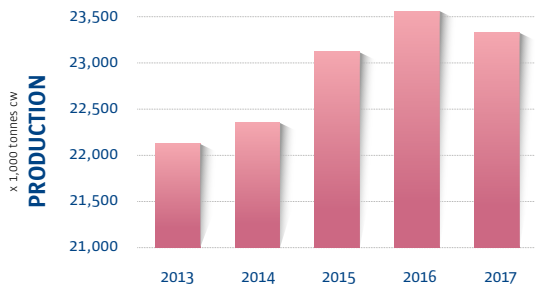
Source: Statistics Belgium by FASFC

PRODUCTION

Slaughterings (number and production)



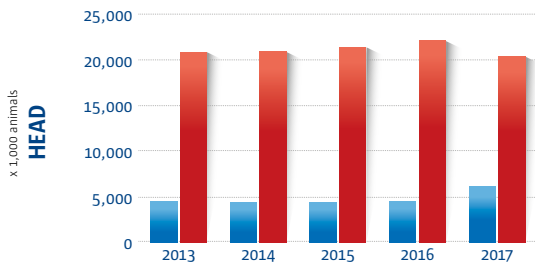
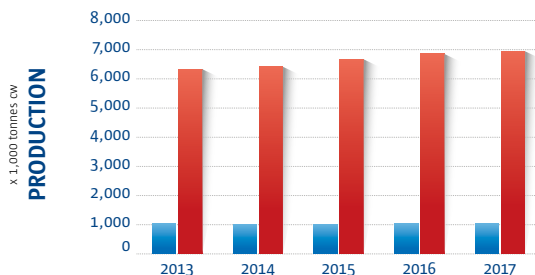
PIG SLAUGHTERINGS IN EU



Source: Eurostat



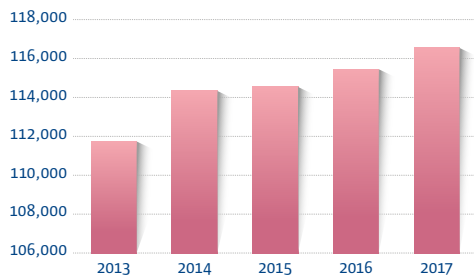
CATTLE AND VEAL SLAUGHTERINGS IN EU



Source: Eurostat



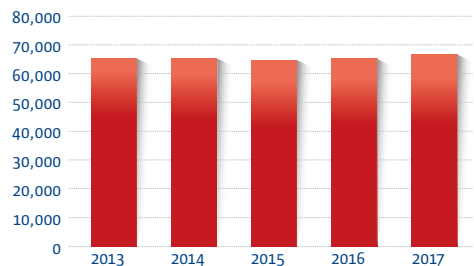
x 1,000 tonnes cw
PRODUCTION



PIG SLAUGHTERINGS WORLD



x 1,000 tonnes cw
PRODUCTION



CATTLE SLAUGHTERINGS WORLD



Source: GIRA/FAO



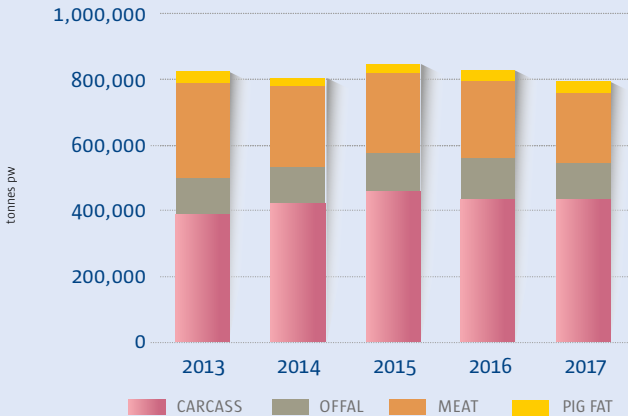
EXPORT

Belgium



EXPORT PORK

In 2017 the export volume decreased slightly by 3.9% to 797,017 tonnes compared to 2016.

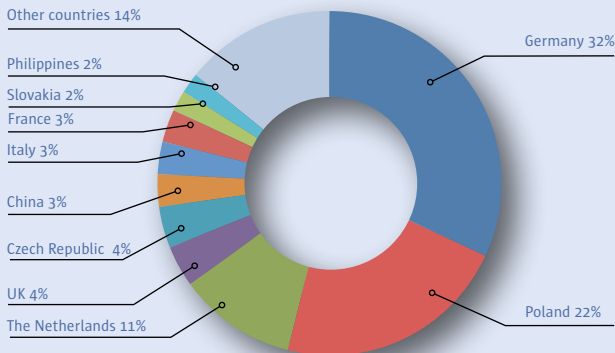


Source: Eurostat



TOP 10 DESTINATIONS – BELGIAN PORK 2017 (VOLUME IN %)

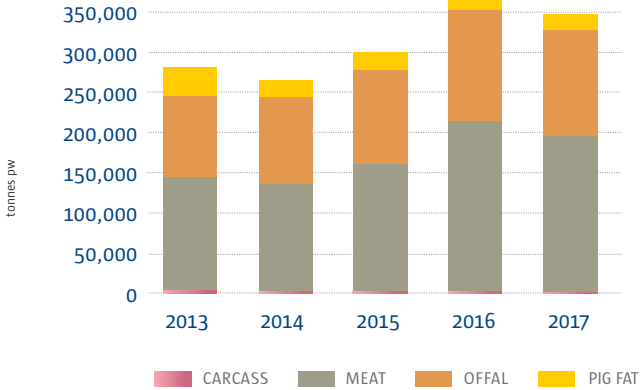
Even in 2017 Germany remains the most important export destination for Belgian pork. Poland ranks second with a volume share of 22%. The Netherlands, UK and the Czech Republic complete the top 5.



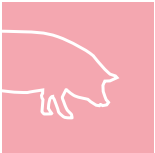
Source: Eurostat



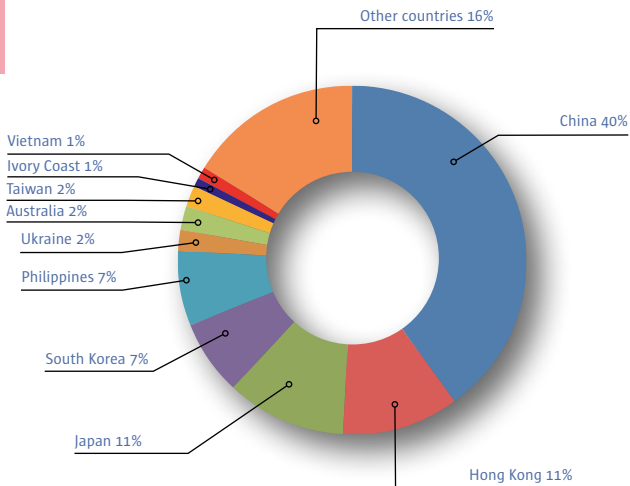
EXPORT OF EUROPEAN PORK - FROM EU28 TO THIRD COUNTRIES



Source: Eurostat



TOP 10 DESTINATIONS - PORK EU28 (VOLUME IN %)

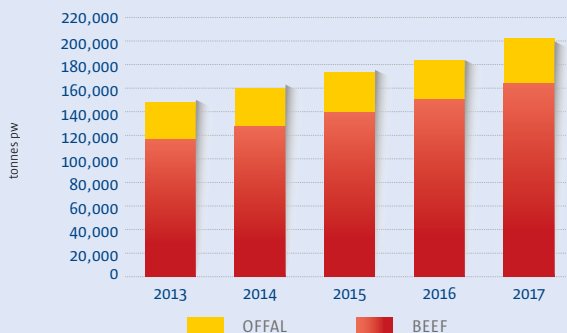


Source: Eurostat



EXPORT OF BELGIAN BEEF

After a 5% rise in 2016, the Belgian beef export increased again in 2017 by 10% to almost 202,500 tonnes.

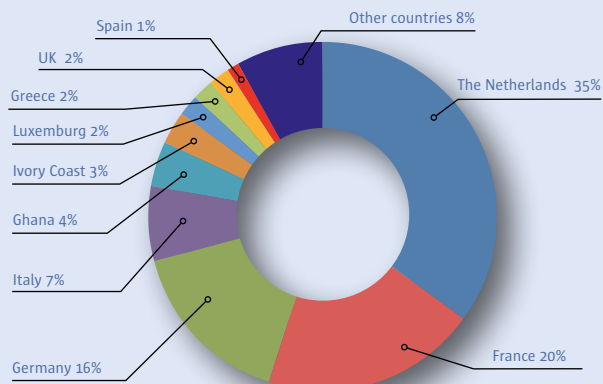


Source: Eurostat



TOP 10 DESTINATIONS - BEEF BELGIUM 2017 (VOLUME IN %)

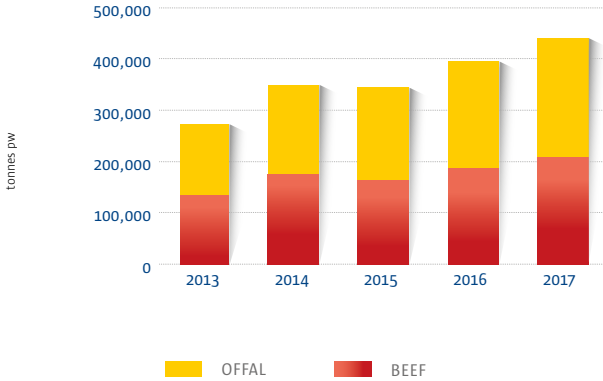
With a volume share of 35%, the Netherlands remains the most important destination for Belgian beef. France, Germany, Italy and Ghana complete the top 5.



Source: Eurostat



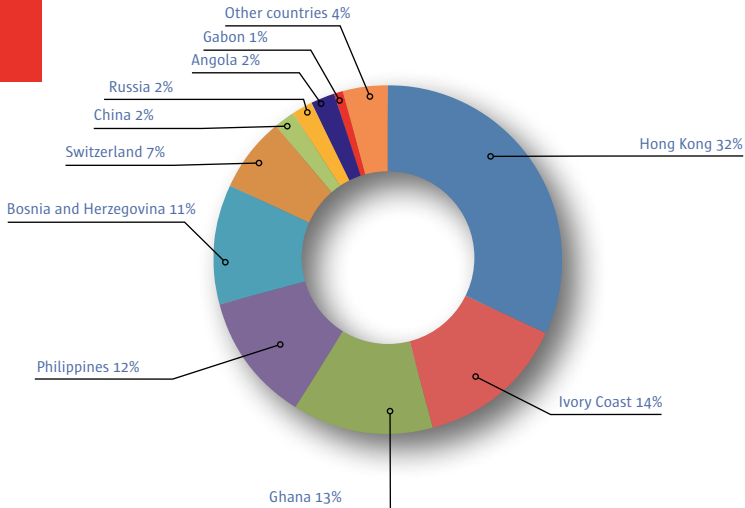
EXPORT OF EUROPEAN BEEF - FROM EU28 TO THIRD COUNTRIES



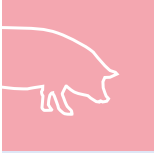
Source: Eurostat



TOP 10 DESTINATIONS - BEEF EU28 (VOLUME IN %)

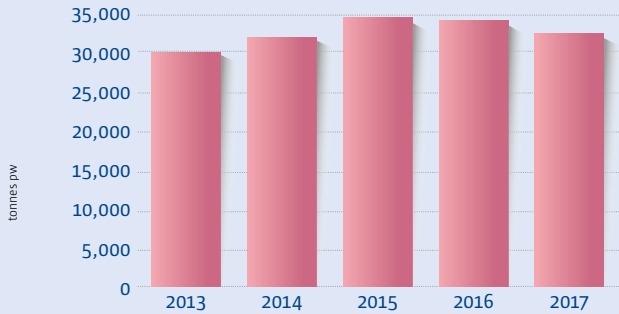


Source: Eurostat

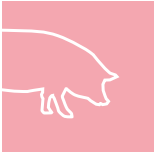


TOTAL BELGIAN EXPORT TO THE UNITED KINGDOM

The total Belgian export of pork to the UK amounted to 32,277 tonnes in 2017 and decreased by almost 5% compared to 2016.

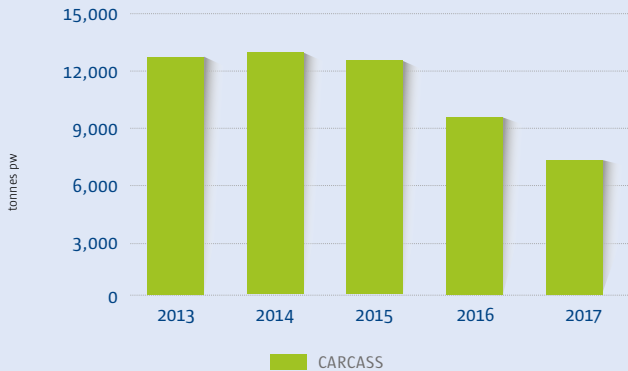


Source: Eurostat



BELGIAN EXPORT OF CARCASSES TO THE UNITED KINGDOM

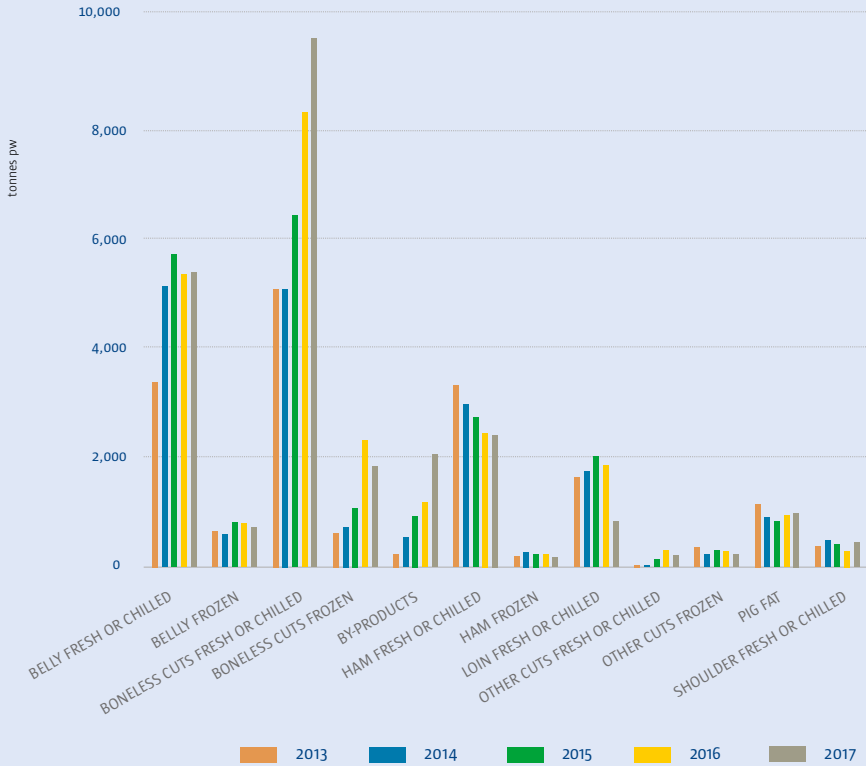
In 2017 the Belgian export of pig carcasses to the UK decreased to 7,041 tonnes. This means a drop of almost 25% compared to the year before.





BELGIAN EXPORT OF MEAT, OFFAL AND FAT TO THE UNITED KINGDOM

The graph below gives a more detailed representation of the export of meat, offal and fat to the United Kingdom. In 2017 the increase in the export of boneless cuts is evident.



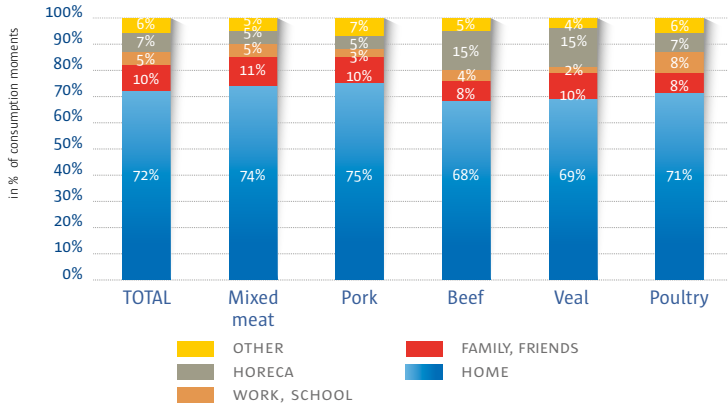
Source: Eurostat

CONSUMPTION

Place of consumption



PLACE OF CONSUMPTION OF MEAT/POULTRY IN BELGIUM (excl. meat products)



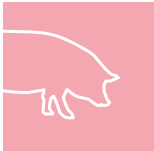
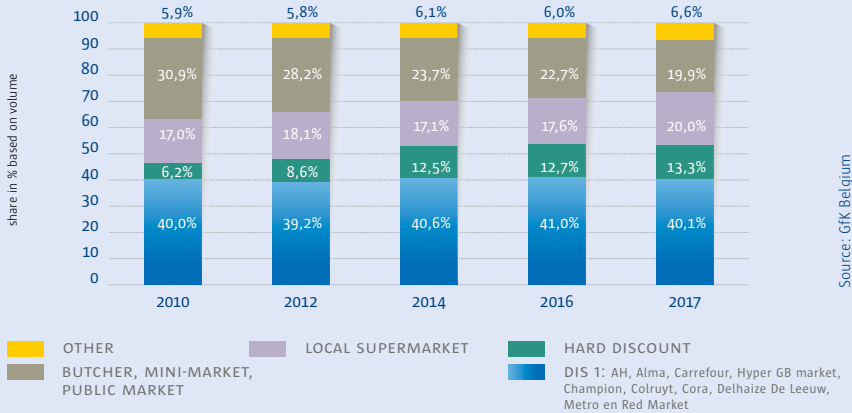
Source: consumption tracker 2017 iVox for VLAM



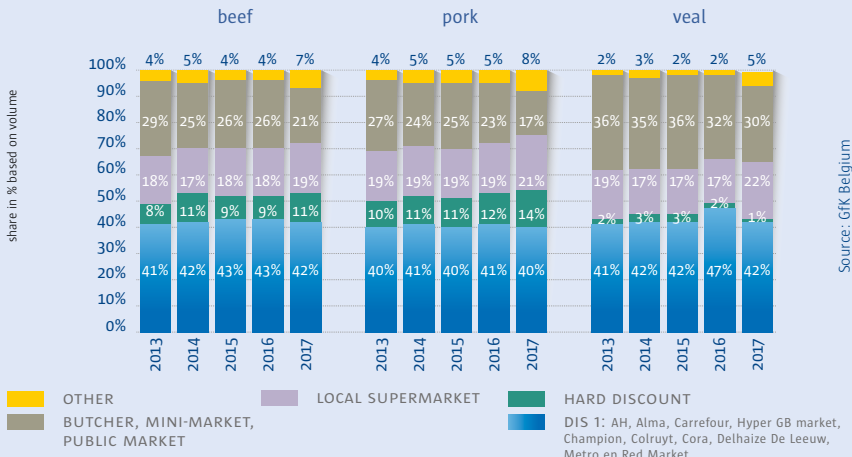
Purchase channel



FRESH MEAT DISTRIBUTION CHANNEL SHARE IN BELGIUM (share in % based on volume)



FRESH MEAT DISTRIBUTION CHANNEL SHARE IN BELGIUM (share in % based on volume)



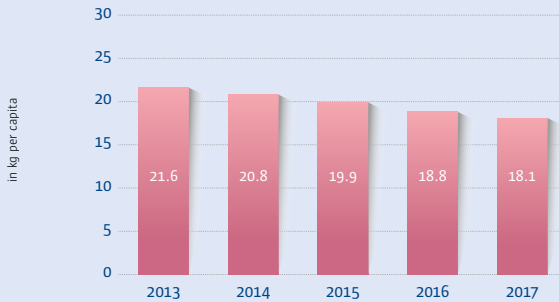
CONSUMPTION

General consumption



PURCHASE OF MEAT FOR HOME USE IN BELGIUM (volume: fresh + frozen; excl. poultry)

In 2017 the purchase of meat for home use dropped further. The main reasons for this are a decreasing purchase frequency and a smaller volume per purchase.



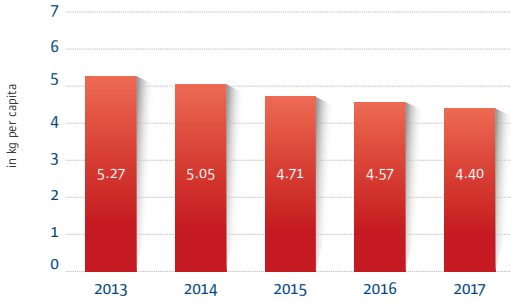
Source: GfK Belgium

Consumption by type of meat

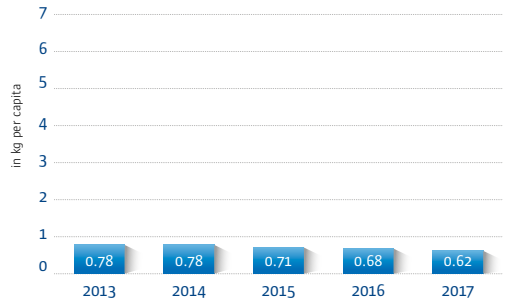
PURCHASE FRESH MEAT BY TYPE IN BELGIUM (in kg per capita)



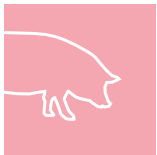
BEEF



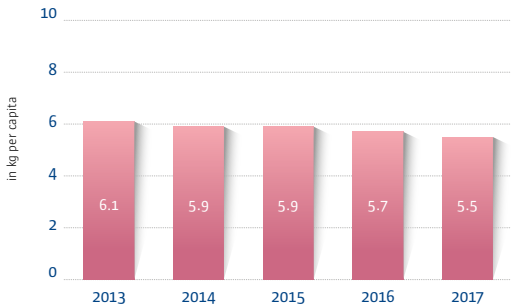
VEAL



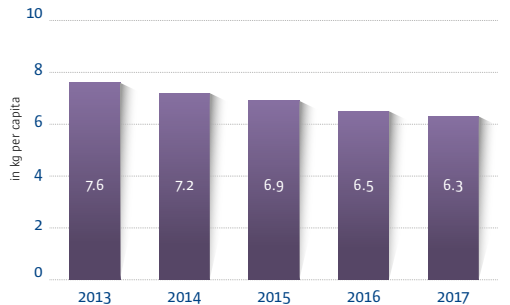
Source: GfK Belgium



PORK



MIXED MEAT



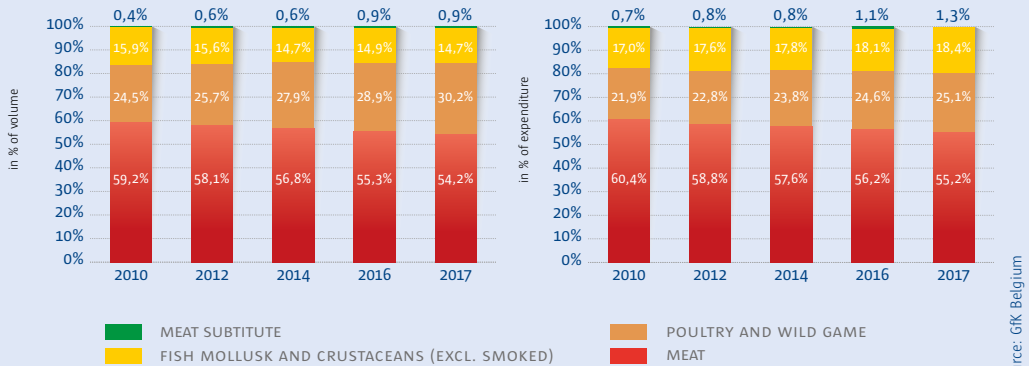
Source: GfK Belgium

CONSUMPTION

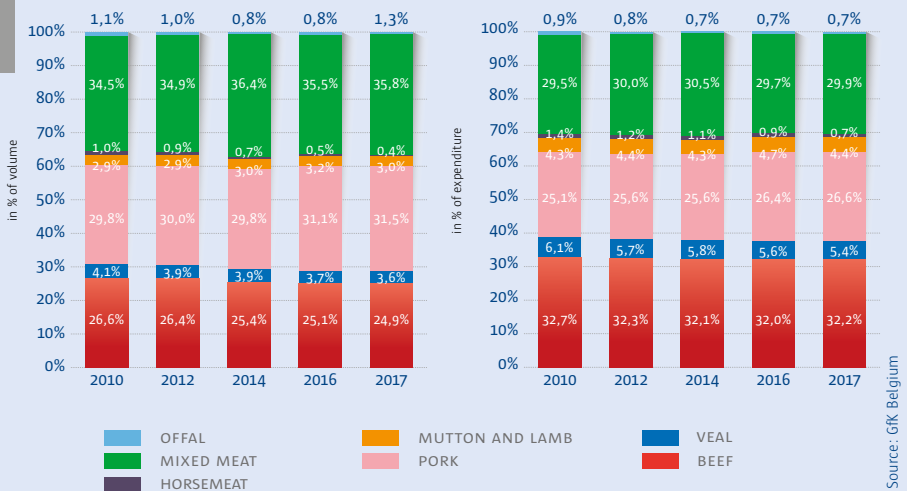
Share meat versus poultry and fish



SHARE OF MEAT VERSUS POULTRY AND FISH IN HOME USE IN BELGIUM (Fresh + frozen)

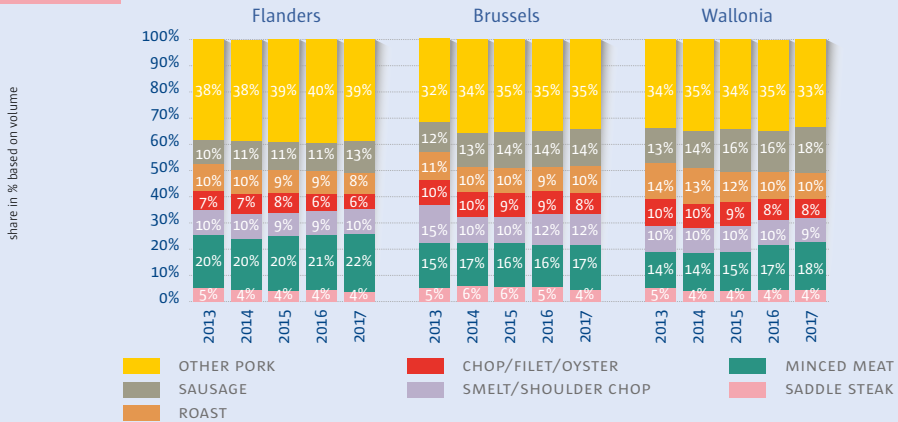


SHARE OF FRESH MEAT BY TYPE IN BELGIUM





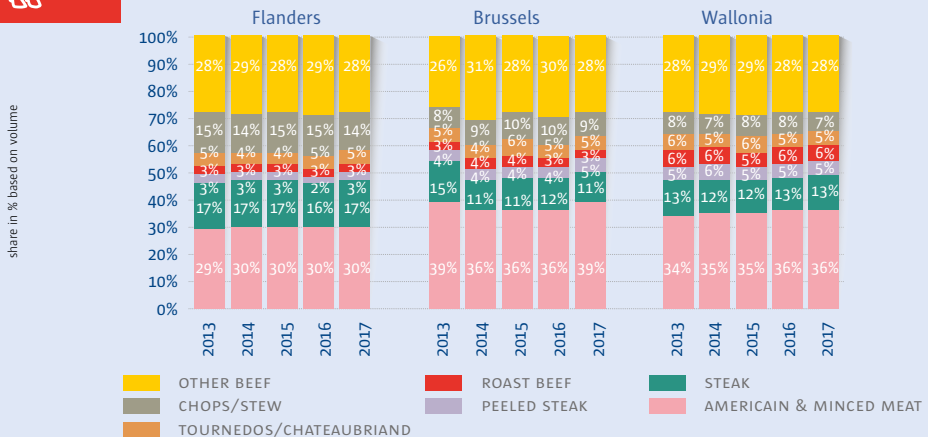
PURCHASE FRESH PORK BY PRODUCT CATEGORY IN BELGIUM (share in % based on volume)



Source: GfK Belgium



PURCHASE FRESH BEEF BY PRODUCT CATEGORY IN BELGIUM (share in % based on volume)



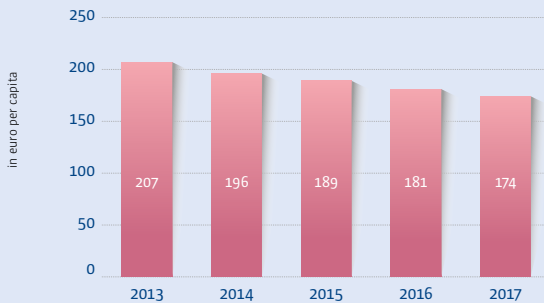
Source: GfK Belgium



PURCHASE MEAT IN BELGIUM

(expenditures in euro per capita: fresh + frozen; excl. poultry)

The main reason of the declining meat consumption is a decrease in purchase frequency. Consumers thus eat meat less frequently or eat smaller portions.



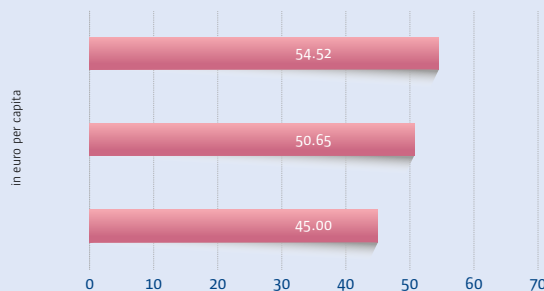
Source: GfK Belgium



PURCHASE MEAT IN 2017 BY TYPE OF MEAT

(in euro per capita)

In 2017 the total purchase of fresh meat for home use amounted to 169.17 euro. The graph below gives an overview of the types of meat on which consumers spent the most, therefore it doesn't contain all types of meats. Beef comes first, followed by mixed meats and pork.



Source: GfK Belgium





**BELGIAN
MEAT
OFFICE**

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