

AGRICULTURAL OUTLOOK

Sowing the Future of EU Agriculture



The Sustainable Transition of the EU Livestock and Dairy Sectors

Andrea Porcella Capkovicova, Team Leader of EU Agricultural Outlook

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Why EU animal production is transitioning?



EU agriculture at a turning point...

Increasing productivity
has led to increasing
surpluses...

... while **GHG emissions**
are not increasing since
2010

EU food system is a
globally trusted provider
of safe, nutritious and
high-quality food

Why is the EU agriculture
changing and under what
conditions?

Challenges and opportunities ahead

Climate change and more frequent extreme weather events

Habits, expectations and preferences of **EU consumers are changing**

Changing **macroeconomic environment**

EU farming system continues evolving

Climate change and more frequent extreme weather events



A flooded pig farm and surrounding fields in the town of Lugo on May 18, after heavy rains caused flooding across Italy's northern Emilia Romagna region

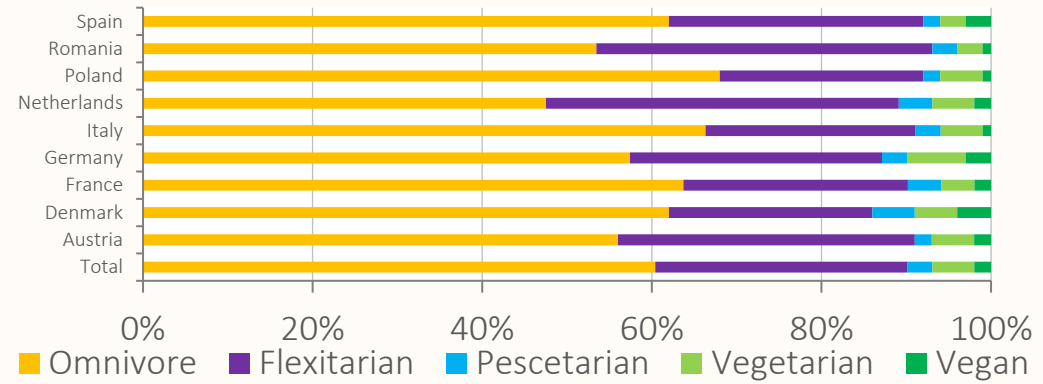


Cattle in parched fields in Tinténiac, north-west France

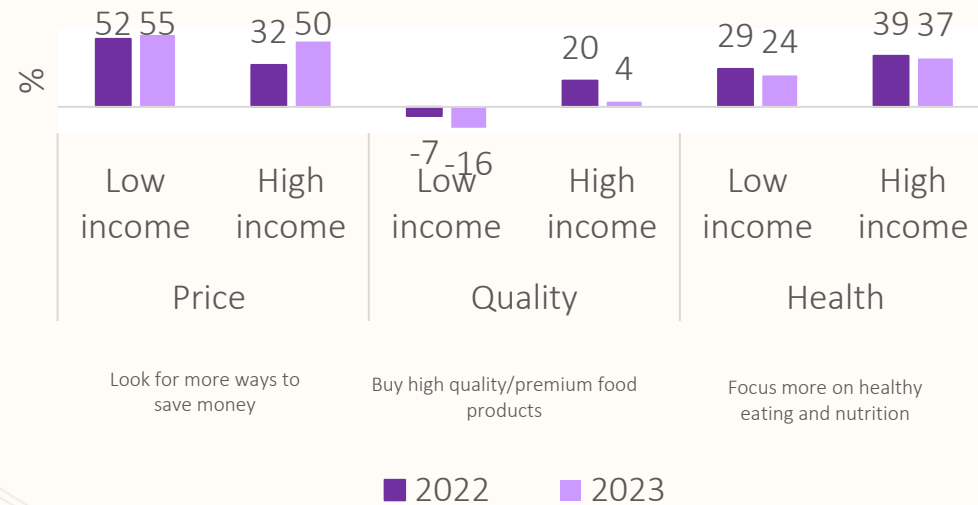


Habits, expectations and preferences of EU consumers are changing

Dietary preferences of consumers in selected EU countries (2021)

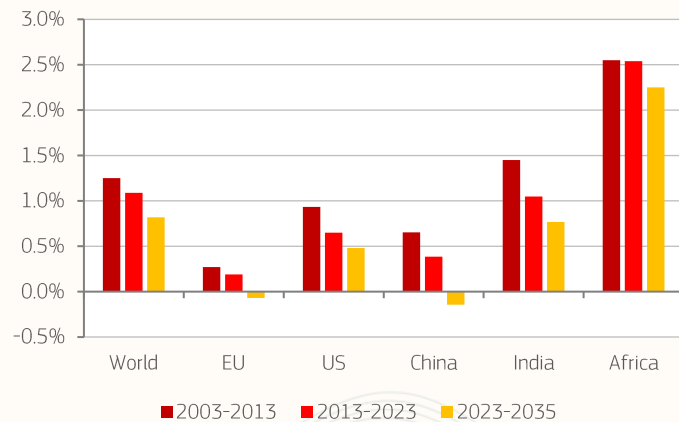


Attitudes towards grocery shopping in 2023 compared with 2022 (net intent of consumers, %)



Changing macroeconomic environment

Annual growth of world population



The World at War in 2023

Countries in which armed clashes between state forces and/or rebels were reported in 2023*



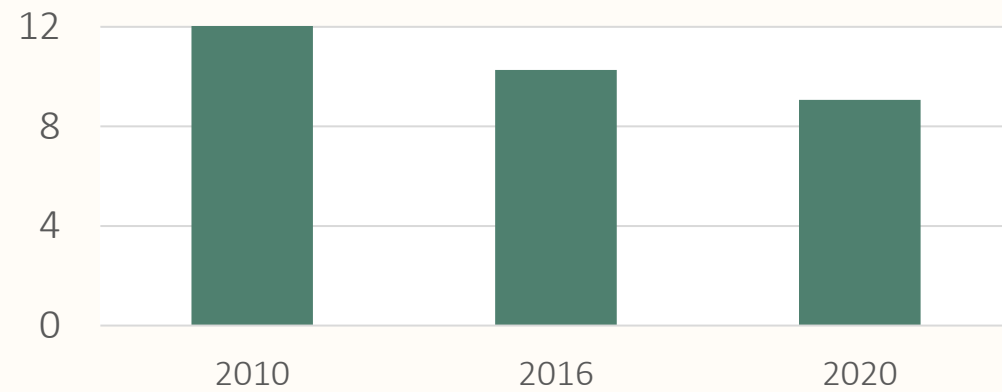
* As of April 28

Source: The Armed Conflict Location & Event Data Project

EU farming system continues evolving



Number of farms (million)

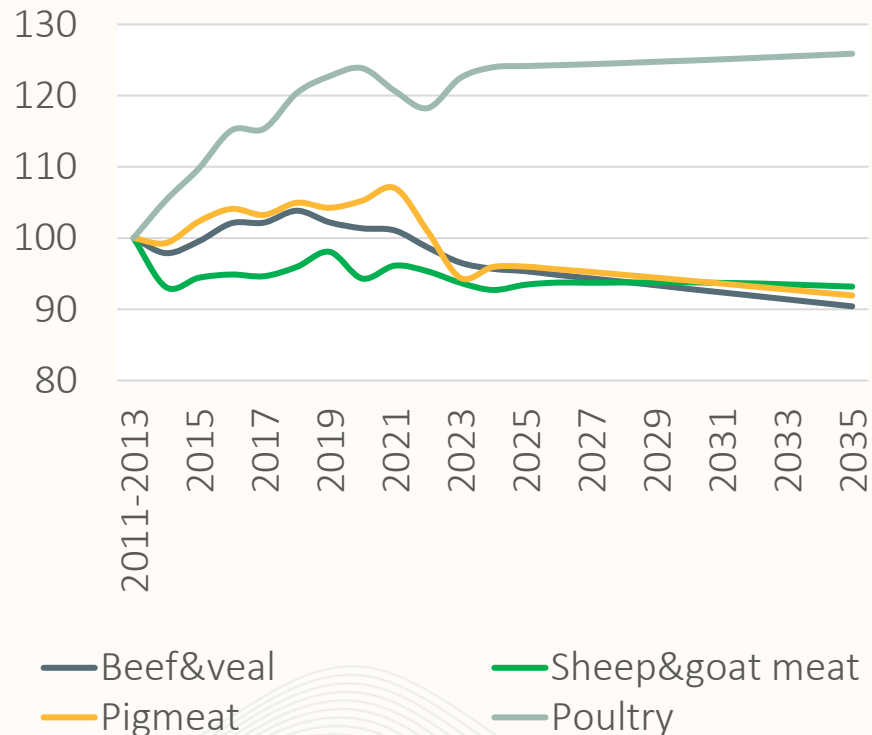




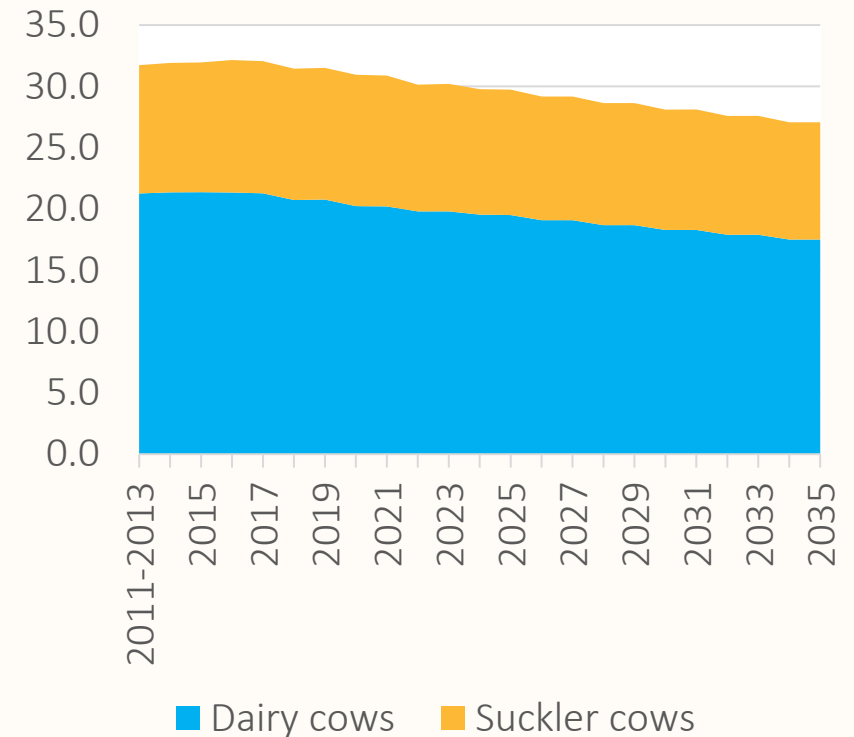
What are signs of this transition?

Meat production subject to environmental and societal concerns

Meat production developments (average 2011-2013 = 100)



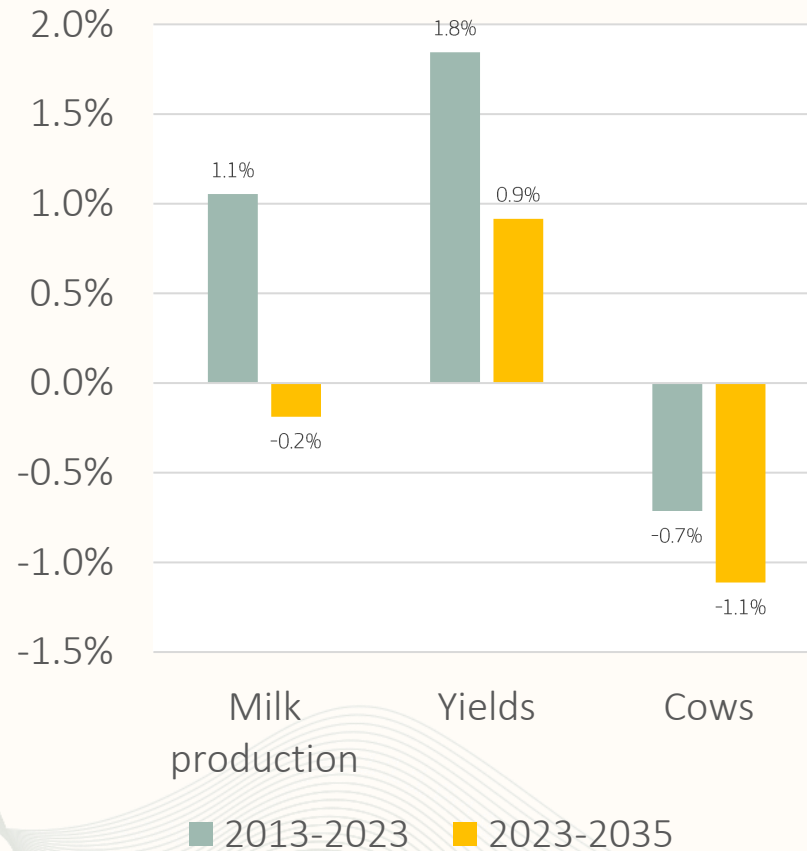
Numbers of cows (million heads)



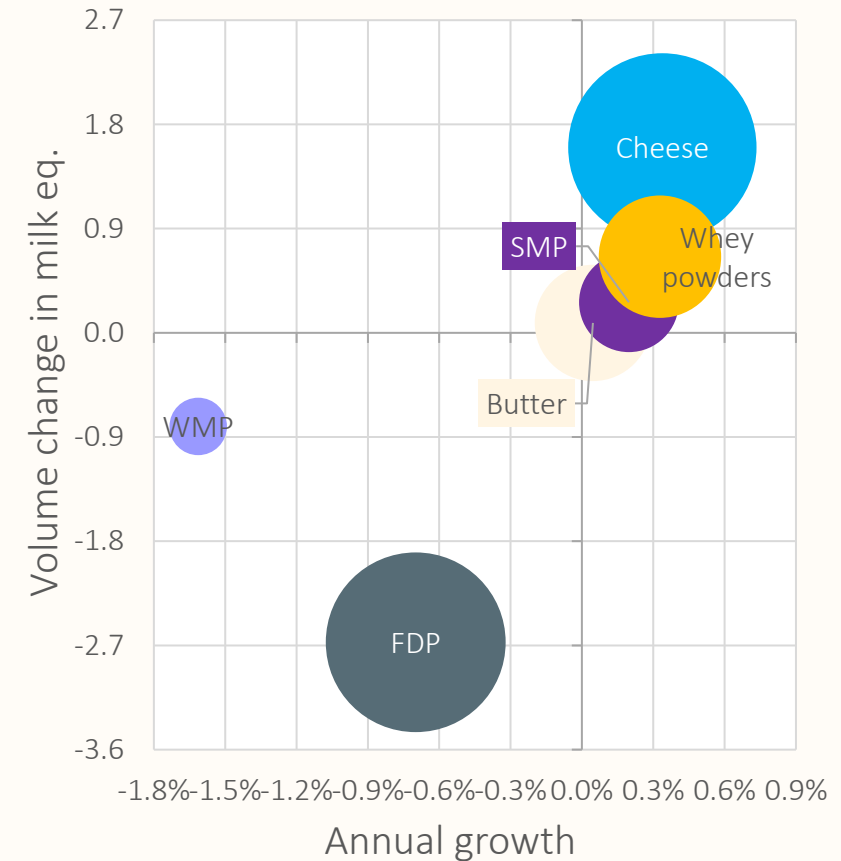
*all graphs are either taken or based on data presented in EU Agricultural Outlook report:
https://agriculture.ec.europa.eu/document/download/a353812c-733e-4ee9-aed6-43f8f44ca7f4_en?filename=agricultural-outlook-2023-report_en_0.pdf

EU milk production at a turning point and headed towards increasing sustainability

Milk production developments



Production of dairy products



*Sizes of bubbles correspond to production in 2021-2023

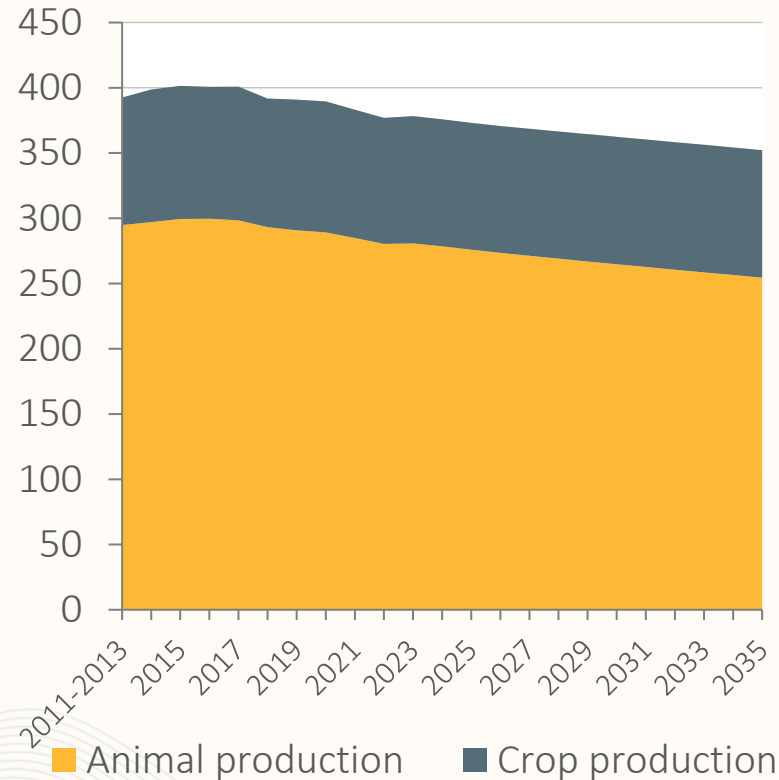
What about GHG emissions?

Reduced consumption

Substitution of inputs with a lower impact

Synergies achieved through integrated processes

GHGs from EU agriculture by animal and crop production (million t of CO₂ eq.)



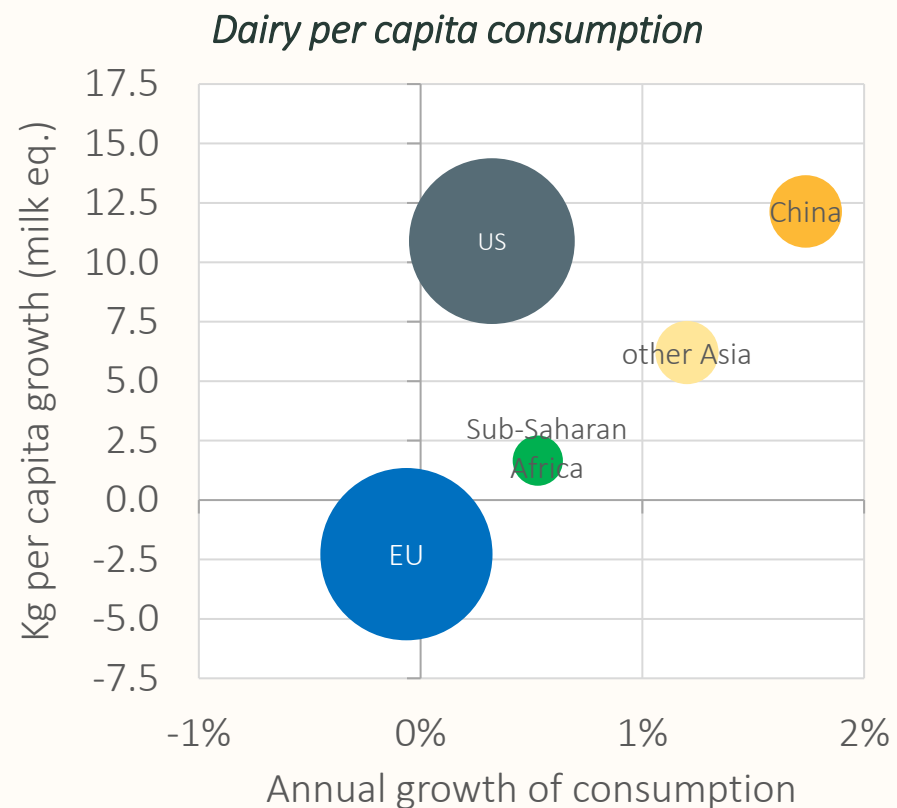
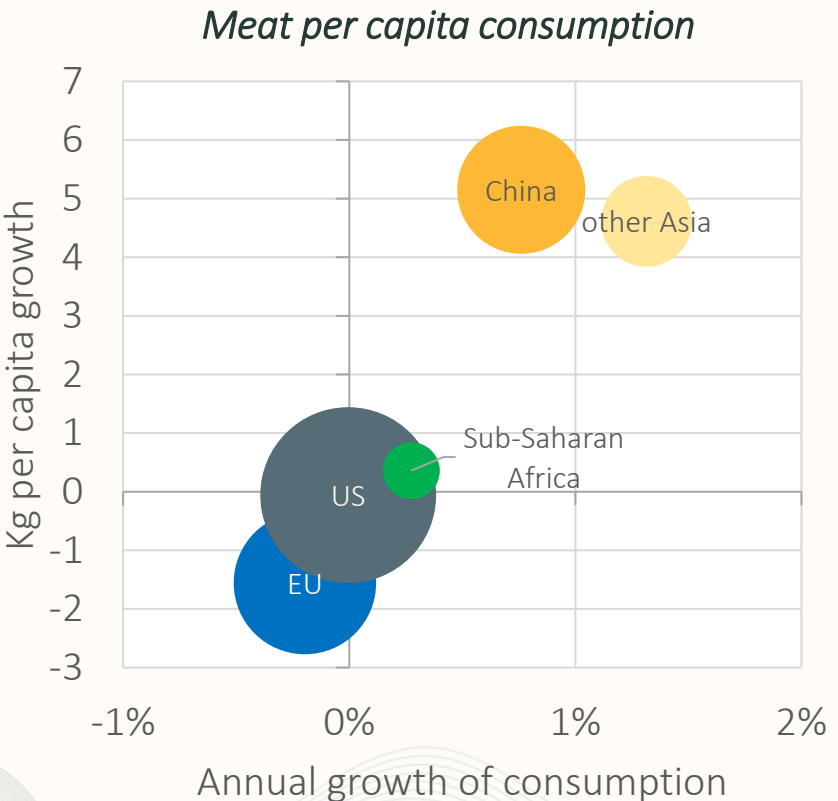
*only based on direct emission factors such as herd size)

Adopting innovative technologies and processes

Increasing efficiency in the use of resources

Increasing feed conversion efficiency

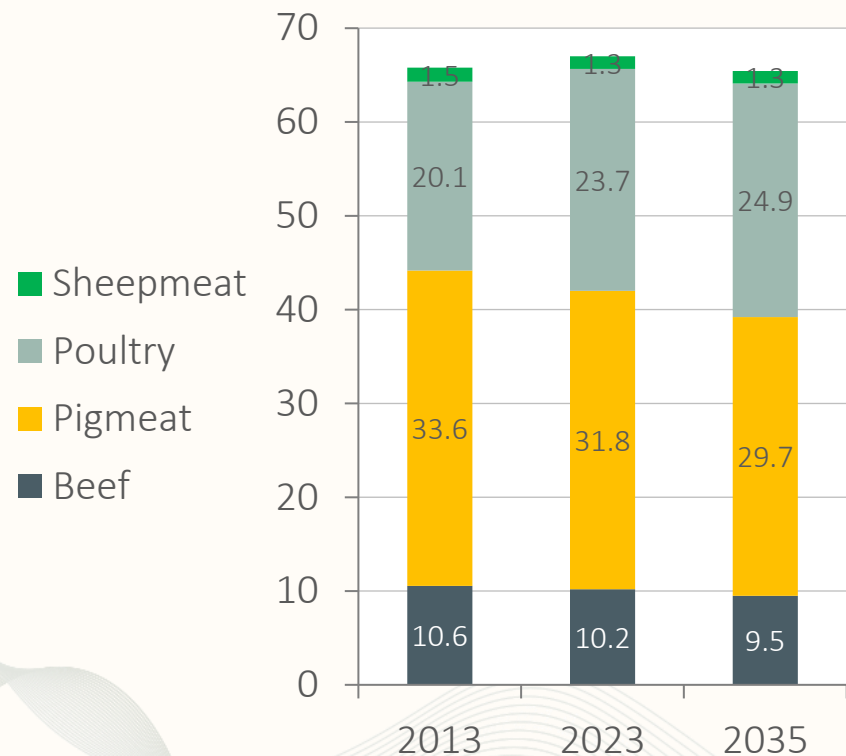
EU consumption of animal products shows some maturity



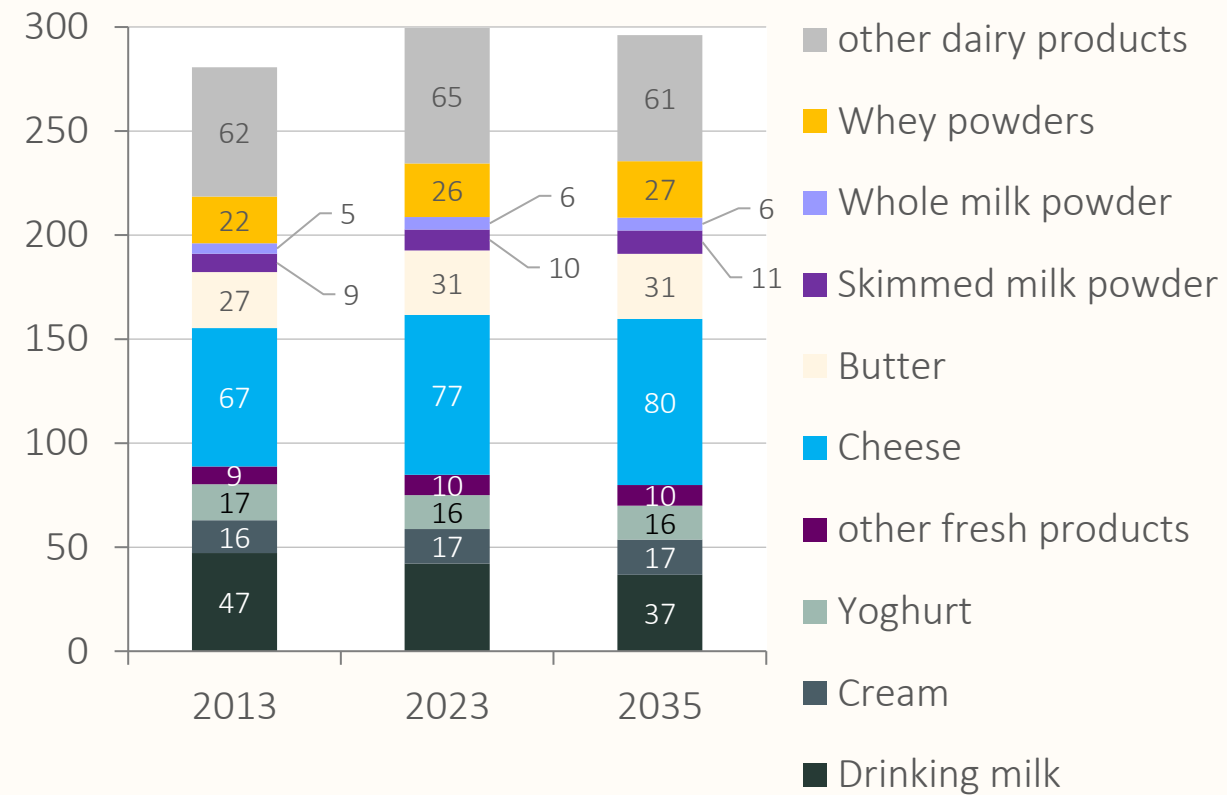
*Sizes of bubbles correspond to per capita consumption in 2021-2023
 ** other Asia represent Asian countries except China and Japan

Differentiation of demand reflects consumer habits and concerns

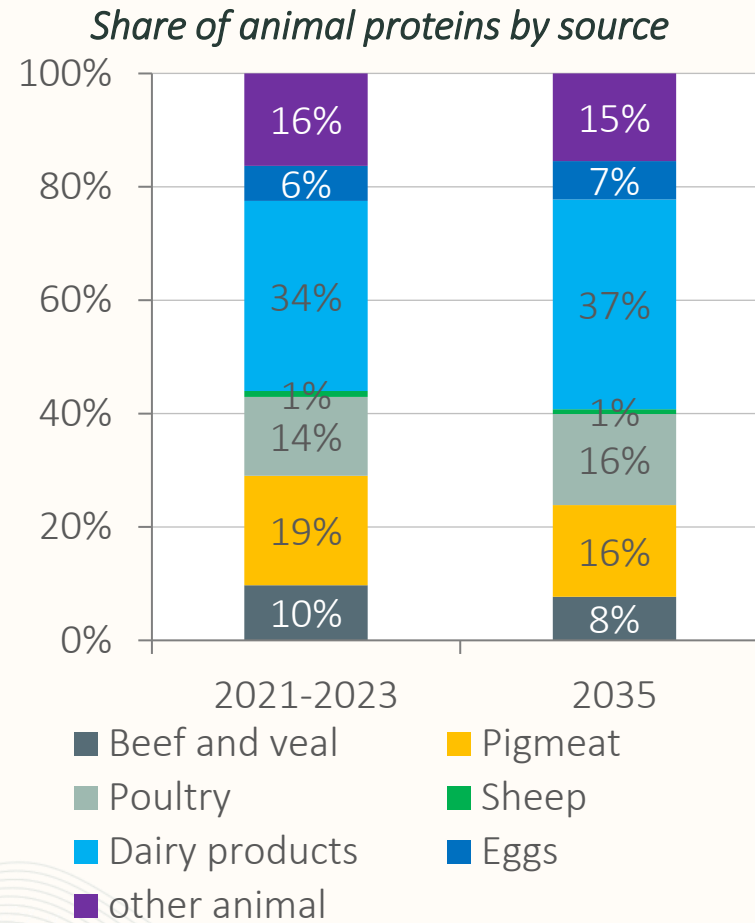
Per capita meat consumption (kg)



Per capita consumption of dairy products (kg of milk equivalent)

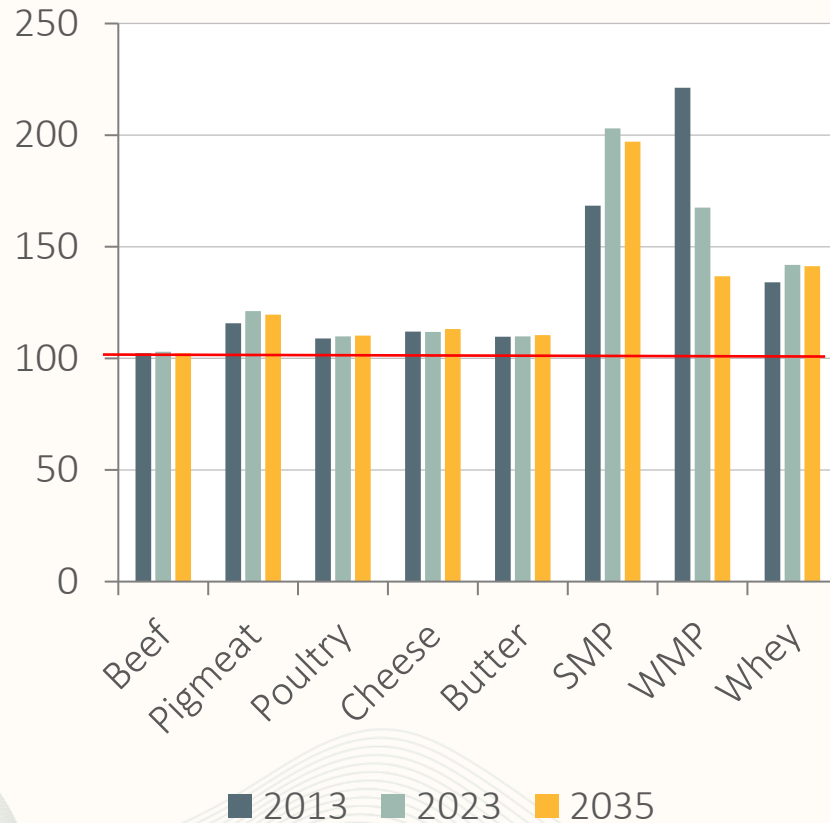


What about animal protein consumption?

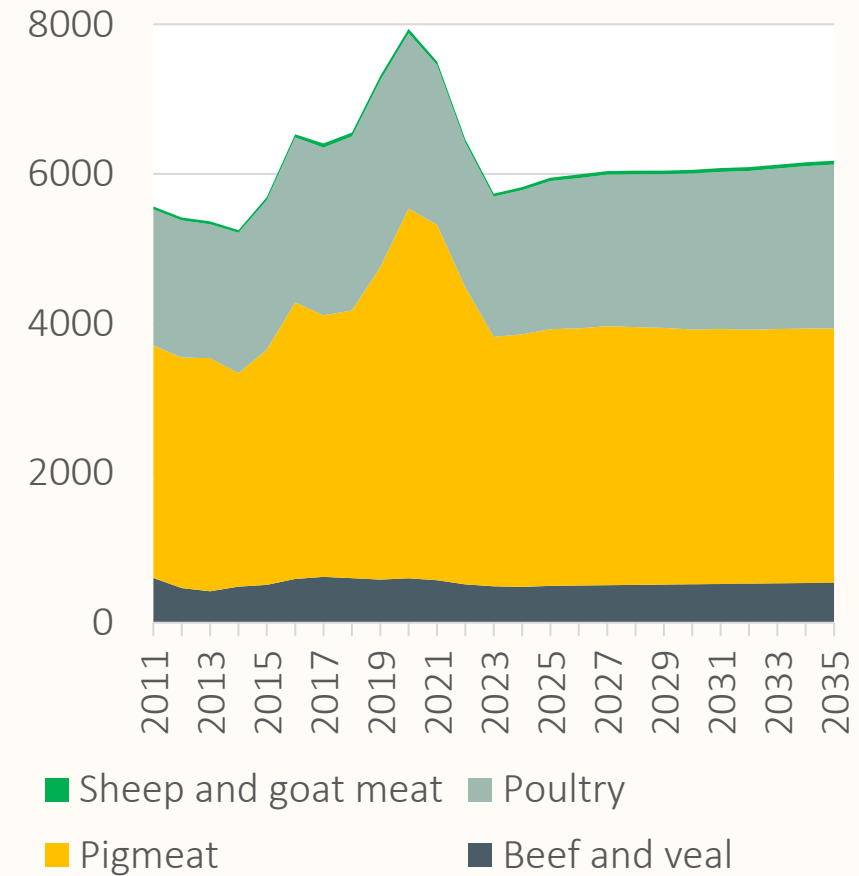


EU continues meeting global animal protein demand

Self-sufficiency in selected animal products (%)

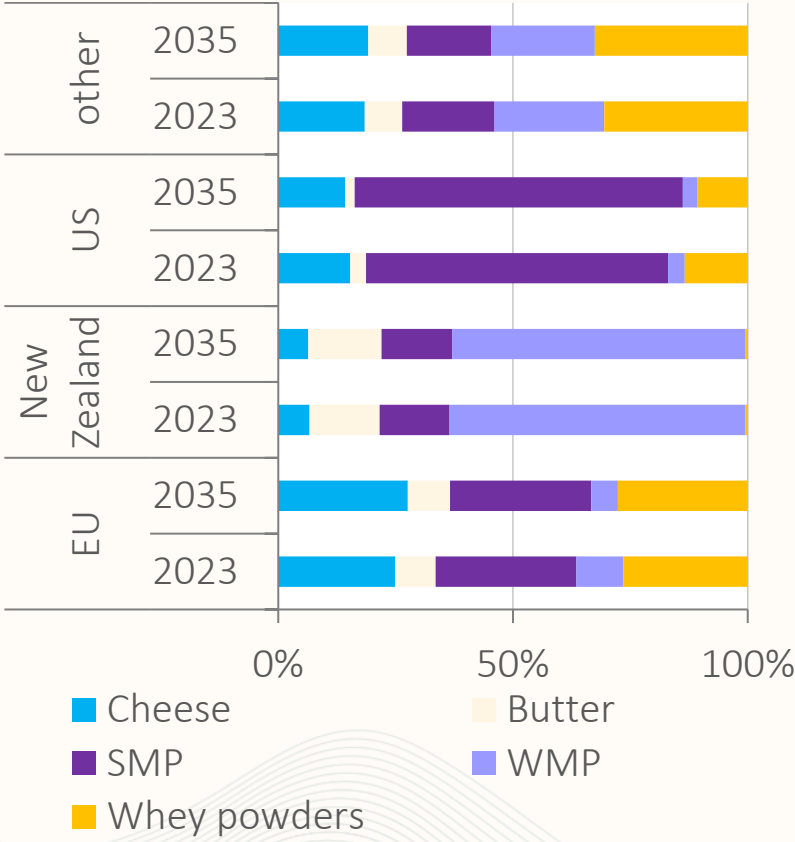


EU exports of meats (1 000 t)

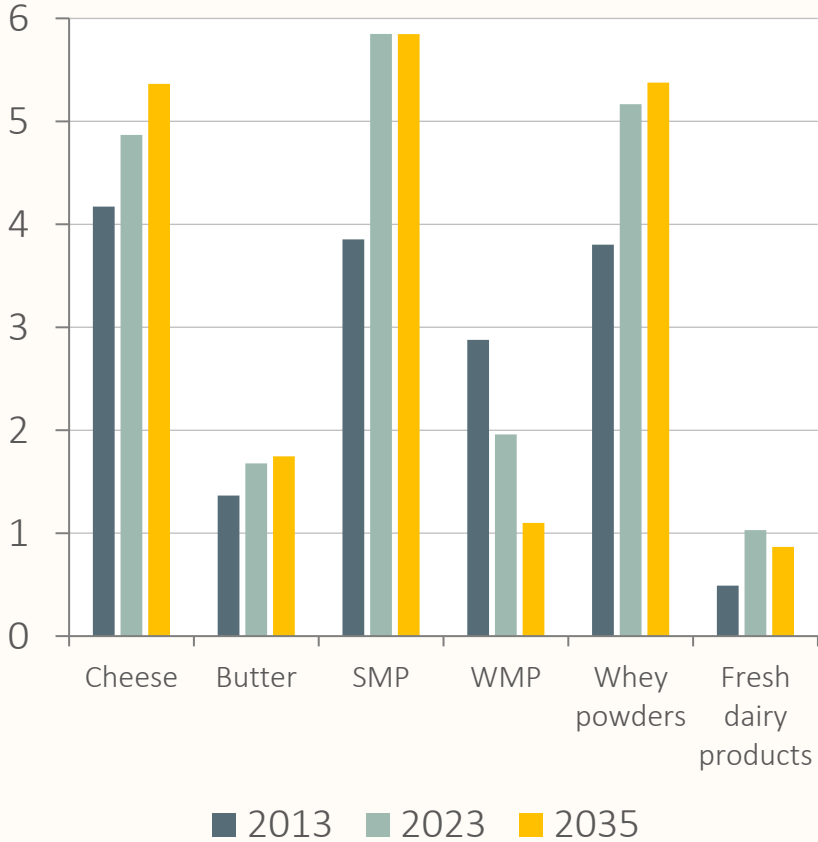


EU dairy sector remains the top global player

Global dairy exports – by products and exporters



EU exports of dairy products (million t of milk eq.)



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Where to find EU Agricultural Report: https://agriculture.ec.europa.eu/data-and-analysis/markets/outlook/medium-term_en

Where to contact us: andrea.porcella-capkovicova@ec.europa.eu



European
Commission 18