

Současné trendy na trhu s vepřovým masem - Svět, Evropa (Česká zemědělská univerzita)

Model transparency cen v potravinové vertikále - vepřové maso

TAČR – Program na podporu aplikovaného společenského a humanitního výzkumu, experimentálního vývoje a inovací ÉTA

PID: TL01000180

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Kontaktní osoba:

prof. Ing. Luboš Smutka, Ph.D.

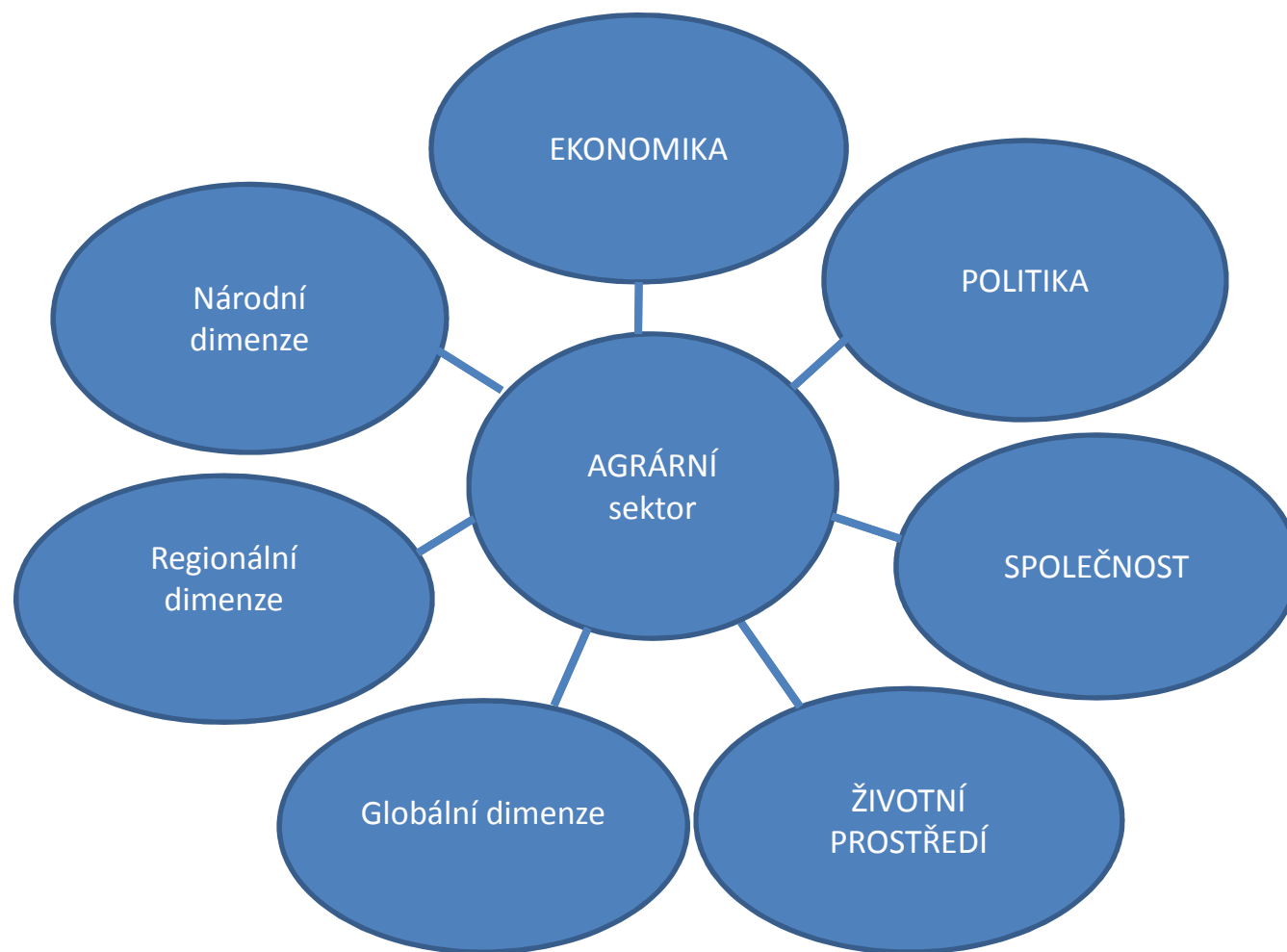
smutka@pef.czu.cz

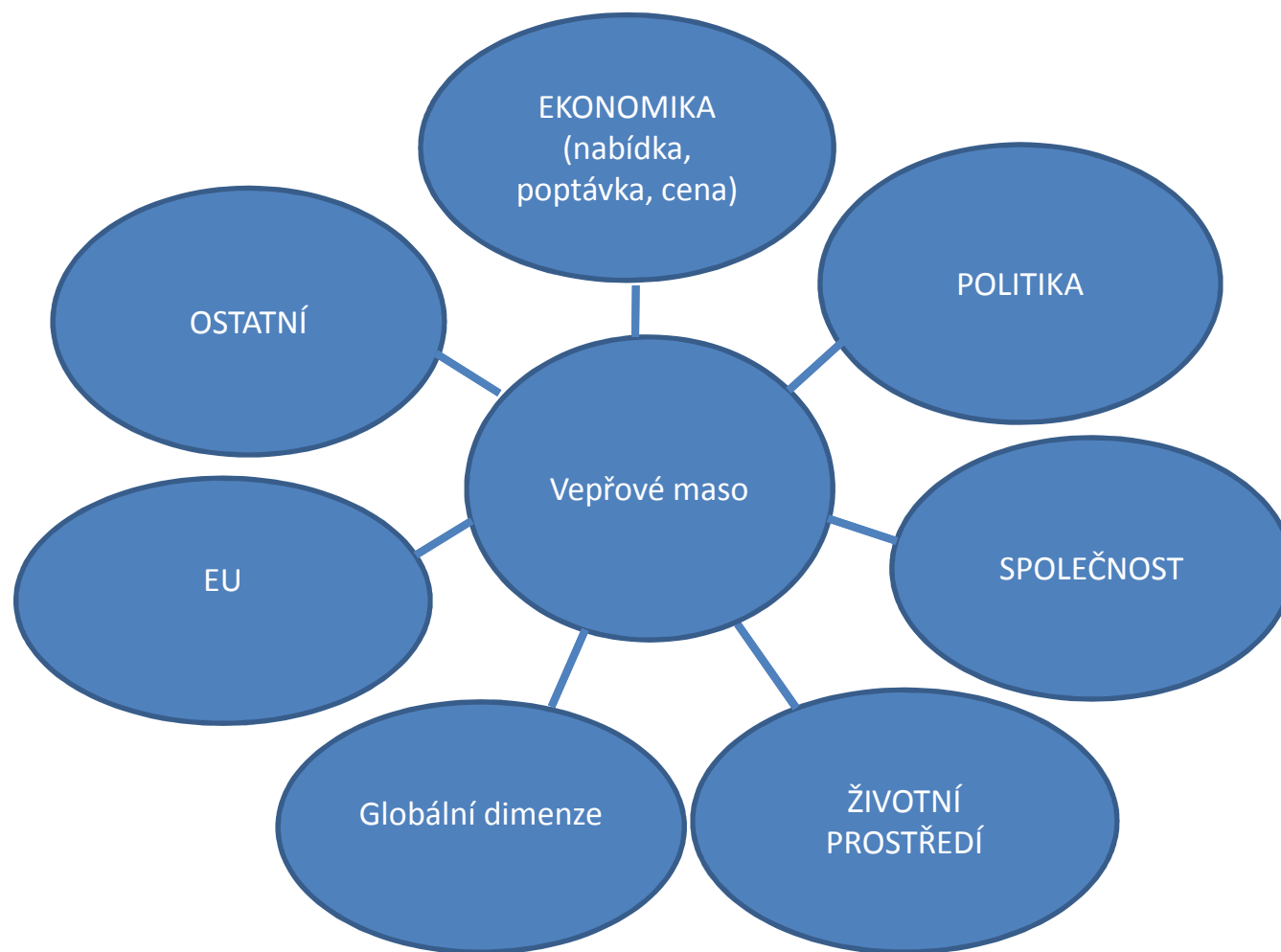
doc. Ing. Ludmila Dömeová, CSc.

domeova@pef.czu.cz

Cílem projektu je:

- Podmínky na trhu s vepřovým masem jsou svým charakterem velmi nejisté. Nerovné dotační podmínky na trhu EU společně s postupnou internacionalizací trhu způsobují výrazné cenové distorze, které negativně ovlivňují ekonomiku chovu prasat. Velmi obtížná predikovatelnost situace a vývoje cen již v minulosti odradila řadu chovatelů prasat od jejich snahy „dělat“ byznys v tomto tradičním odvětví. V důsledku ne zcela ideálních podmínek panujících na trhu poklesla soběstačnost ČR v produkci vepřového masa pod 50 %. Cílem navrženého projektu je poskytnout účinný nástroj pro potřeby zemědělců, který by jim pomohl efektivně se orientovat v tržním prostředí. Nástroj, který umožní zemědělcům reagovat na změny prostředí a tím pádem zvýšit i jejich konkurenceschopnost a udržitelnost celého odvětví.

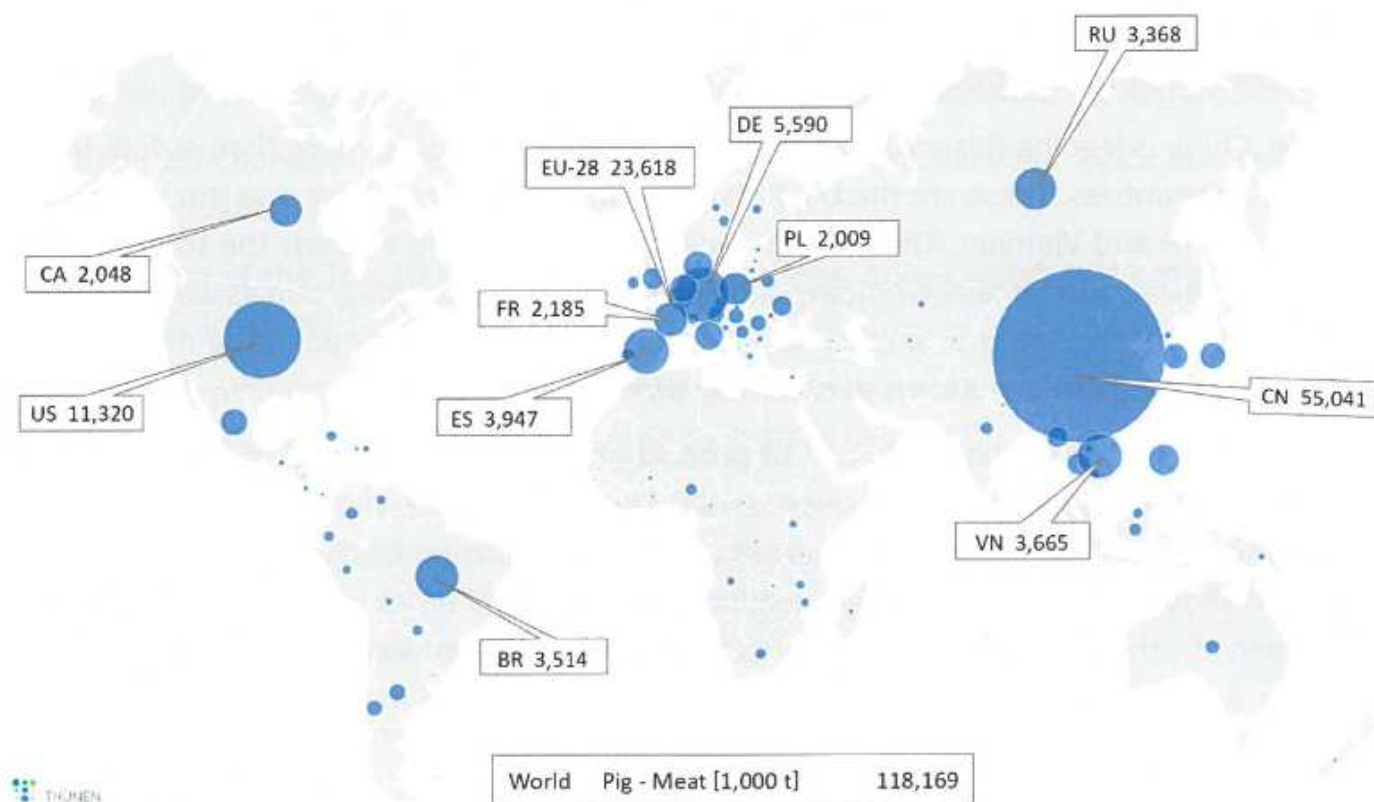




Trh s vepřovým masem ve světě a v EU

Produkce vepřového masa ve světě

Figure 2 Global pig production 2016



Source: FAOStat 08.18

Světový trh s vepřovým masem

Pigmeat production: World total and in selected countries

('000 tonnes, Carcass weight equivalent)

	2015	2016	2017 <i>prelim.</i>	Change 2017 over 2016 (%)
World	118504	117813	118676	0.7
China	55835	53931	54335	0.7
EU	23467	23618	23429	-0.8
United States	11121	11320	11610	2.6
Brazil	3519	3700	3725	0.7
Viet Nam	3492	3665	3720	1.5
Russian Fed.	3099	3368	3473	3.1

Pigmeat imports: World total and in selected countries

('000 tonnes, Carcass weight equivalent)

	2015	2016	2017 <i>prelim.</i>	Change 2017 over 2016 (%)
World	7119	8241	8167	-0.9
China	1441	2529	2115	-16.4
Japan	1286	1371	1481	8.1
Mexico	845	875	916	4.7
Korea Rep of	606	623	654	4.9
United States	607	598	613	2.6
Russian Federation	415	369	401	8.6

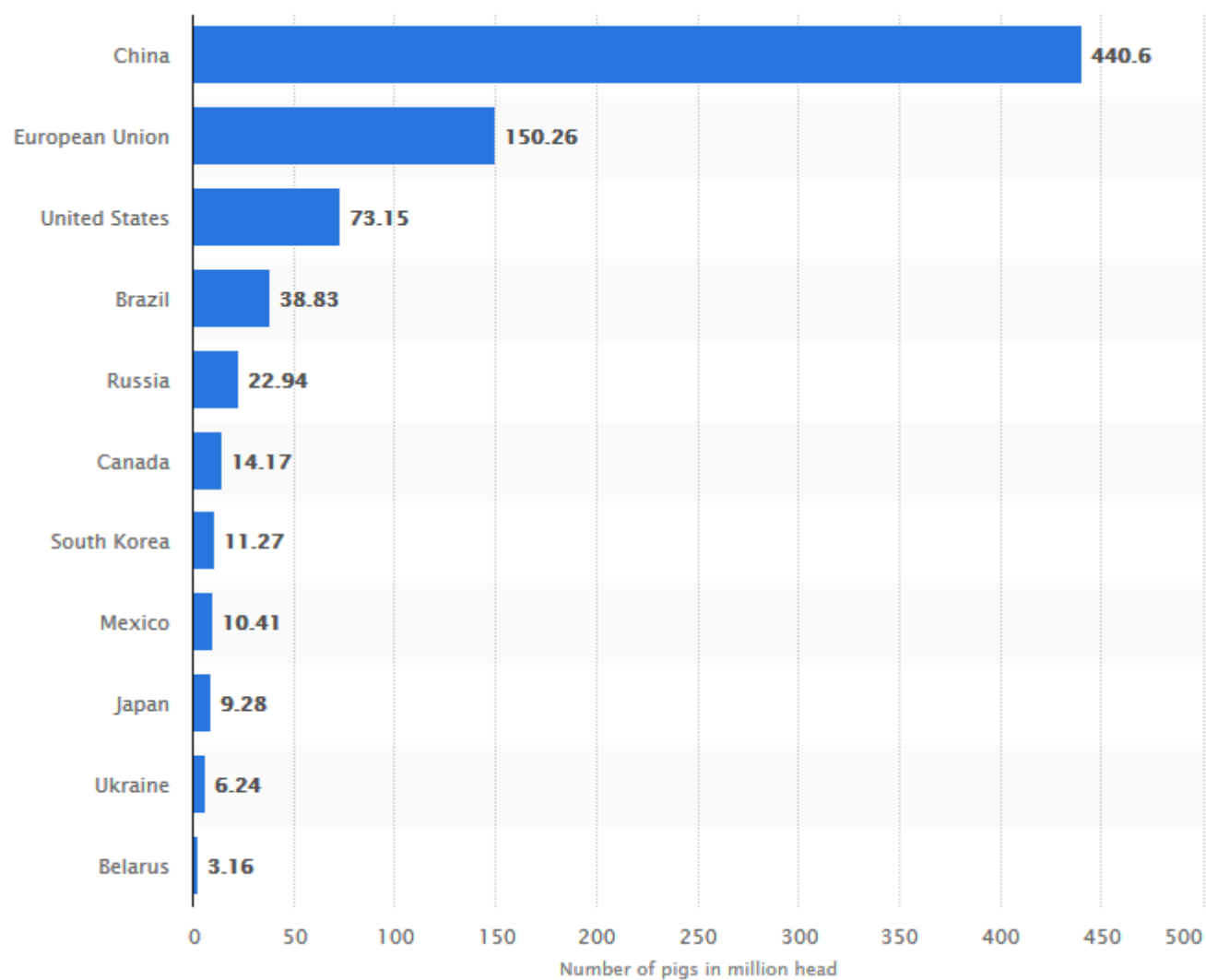
Pigmeat exports: World total and in selected countries

('000 tonnes, Carcass weight equivalent)

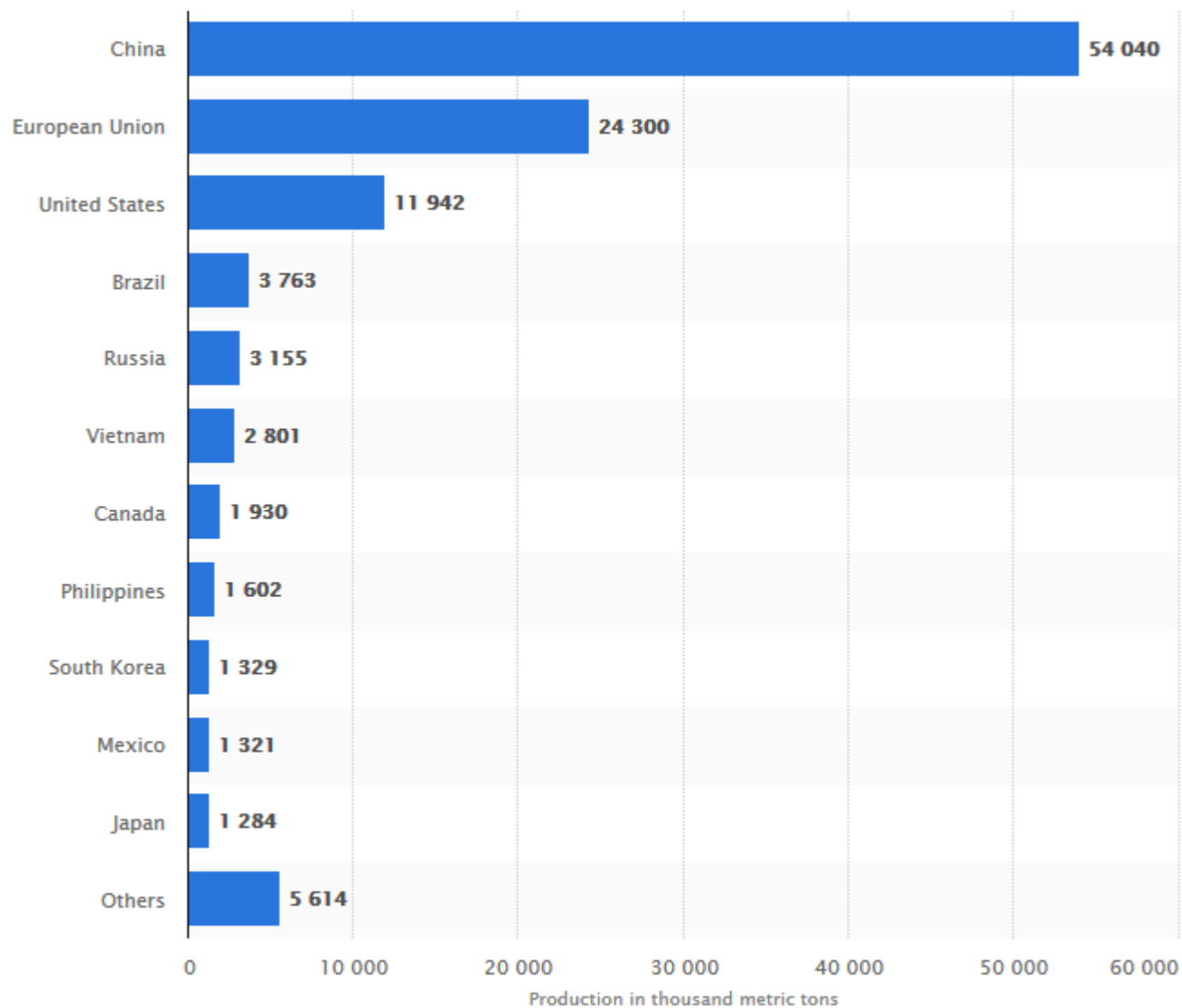
000 tonnes (CWE)

	2015	2016	2017 <i>prelim.</i>	Change 2017 over 2016 (%)
World	7239	8289	8201	-1.1
EU	2415	3107	2845	-8.4
United States	2192	2290	2440	6.5
Canada	1191	1264	1273	0.7
Brazil	691	890	856	-3.8
Mexico	137	150	177	18.1
Chile	169	163	162	-0.4
China	127	102	107	5.0

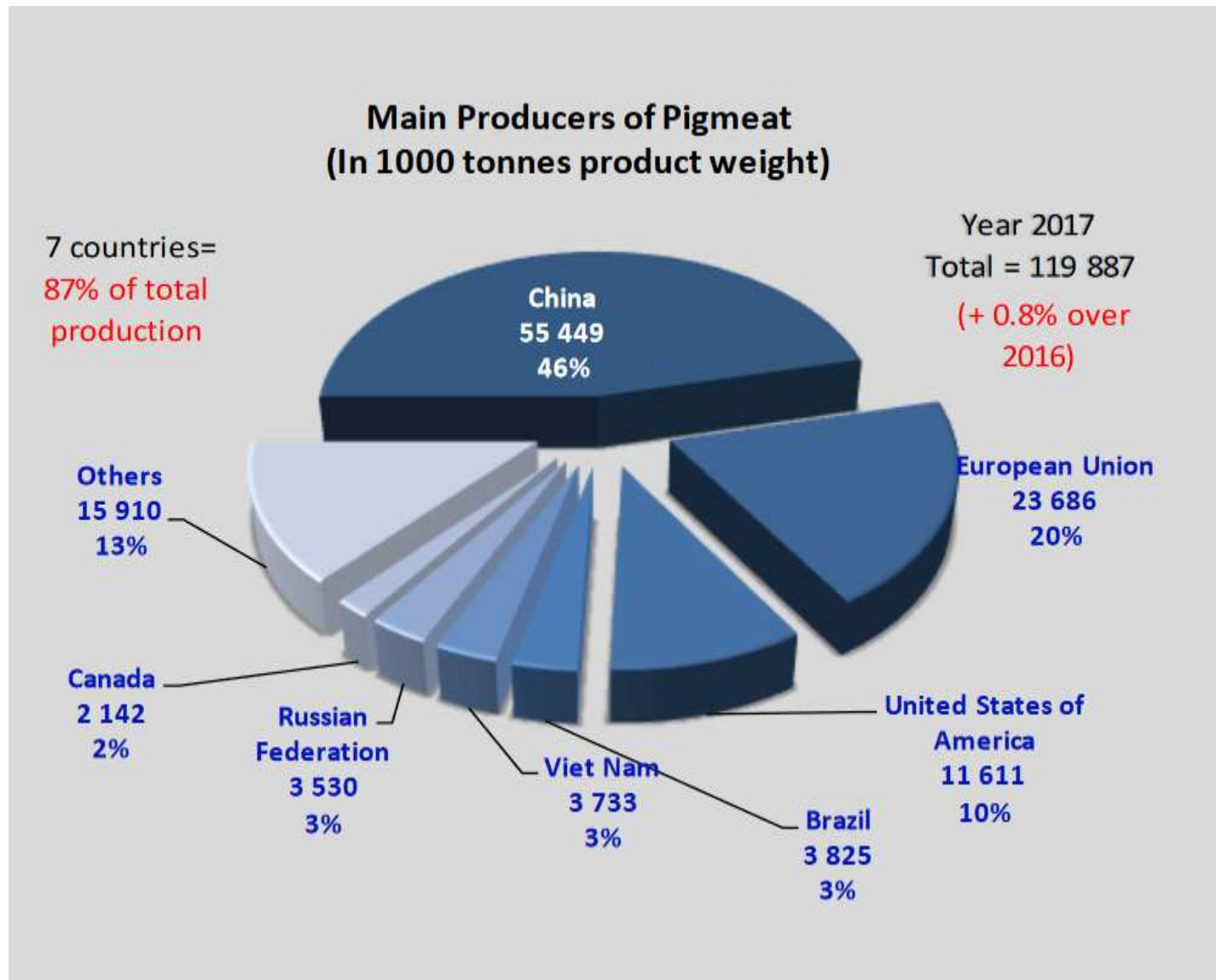
Produkce vepřů ve vybraných zemích světa v milionech kusů v roce 2018



Objem produkce vepřového masa ve vybraných zemích v roce 2018 (v 1,000 tun)



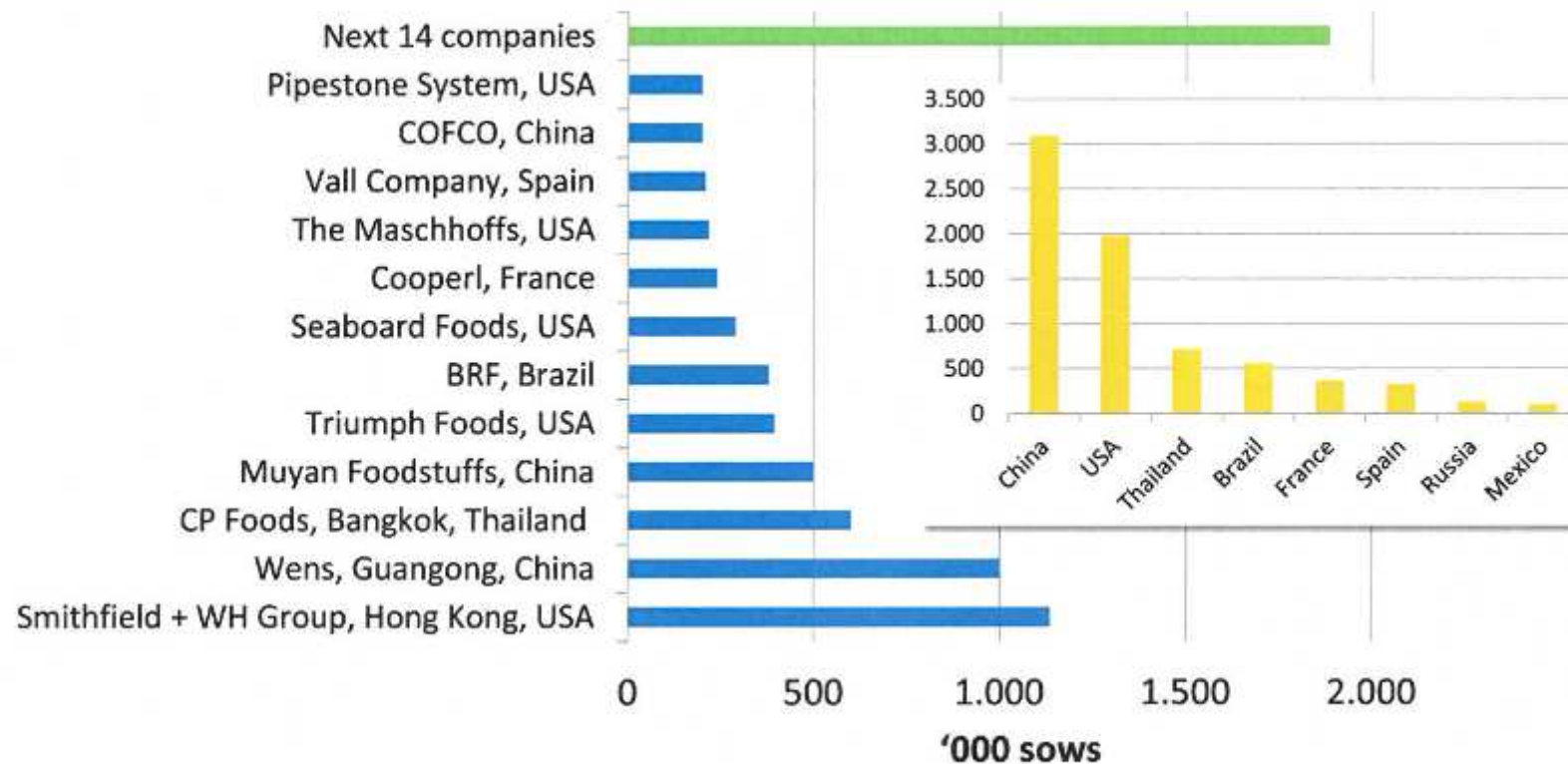
Nejvýznamnější producenti vepřového masa



Klíčové společnosti kontrolující trh s vepřovým masem

Figure 1

The biggest sow keeping companies world-wide ('000 sows inventory)



Source: <https://www.topagrar.com/news/Schwein-News-Schwein-In-Asien-sitzen-die-Mega-Sauenhalter-der-Welt-8946289.html>

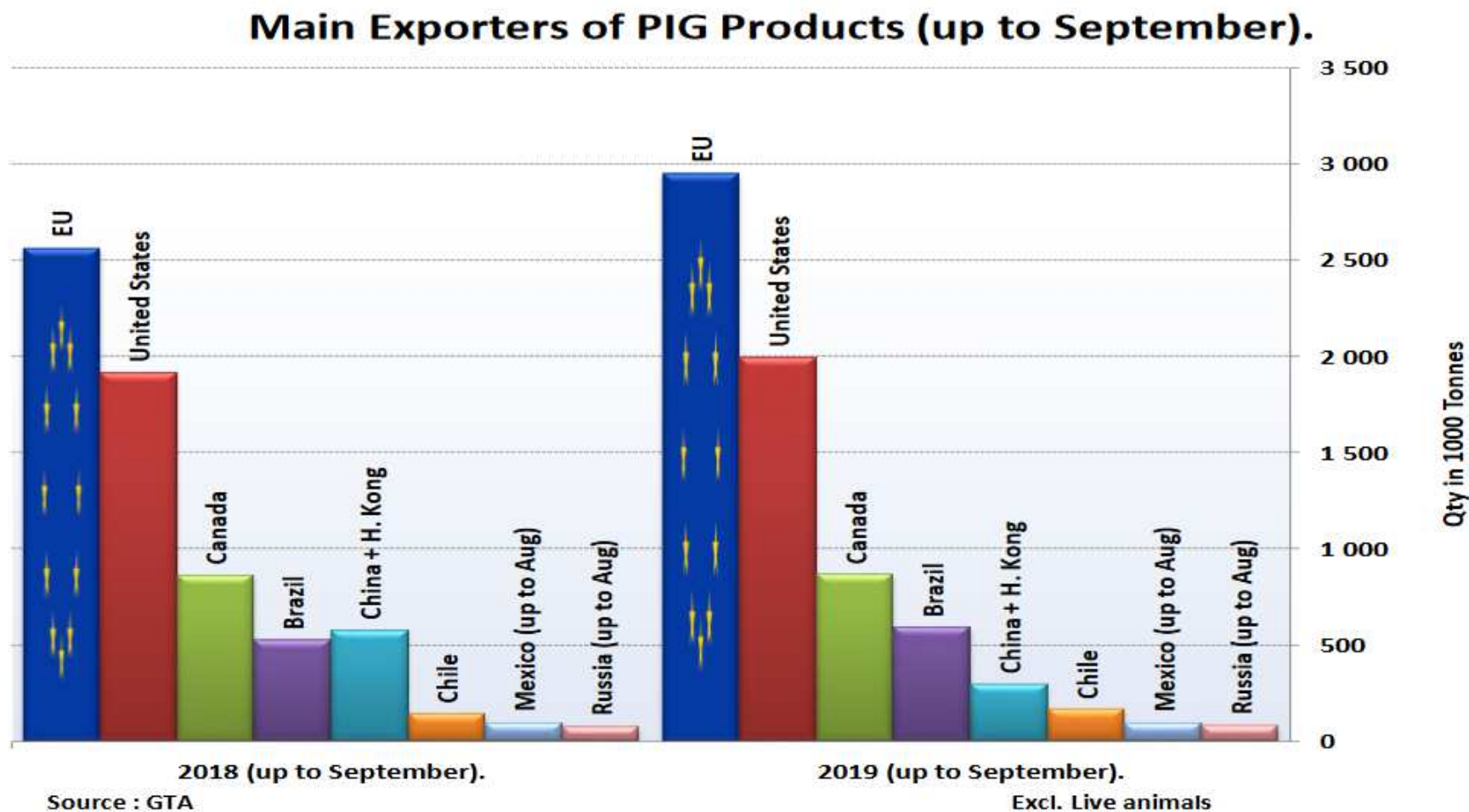
Světový obchod s vepřovým masem

Below are the 15 countries that exported the highest dollar value worth of pork during 2018.

1. United States: US\$4.6 billion (16.2% of total pork exports)
2. Germany: \$4.4 billion (15.5%)
3. Spain: \$4 billion (14.2%)
4. Denmark: \$2.6 billion (9.2%)
5. Canada: \$2.4 billion (8.5%)
6. Netherlands: \$2.1 billion (7.5%)
7. Belgium: \$1.4 billion (4.8%)
8. Brazil: \$1.1 billion (3.8%)
9. Poland: \$1 billion (3.6%)
10. France: \$891.5 million (3.1%)
11. Mexico: \$536.5 million (1.9%)
12. Ireland: \$505.7 million (1.8%)
13. Chile: \$438 million (1.5%)
14. Austria: \$392.5 million (1.4%)
15. United Kingdom: \$389.4 million (1.4%)

The listed 15 countries shipped 94.3% of all pork exports in 2018 by value.

Nejvýznamnější exportéři vepřového masa



Nejvýznamnější exportéři vepřového masa

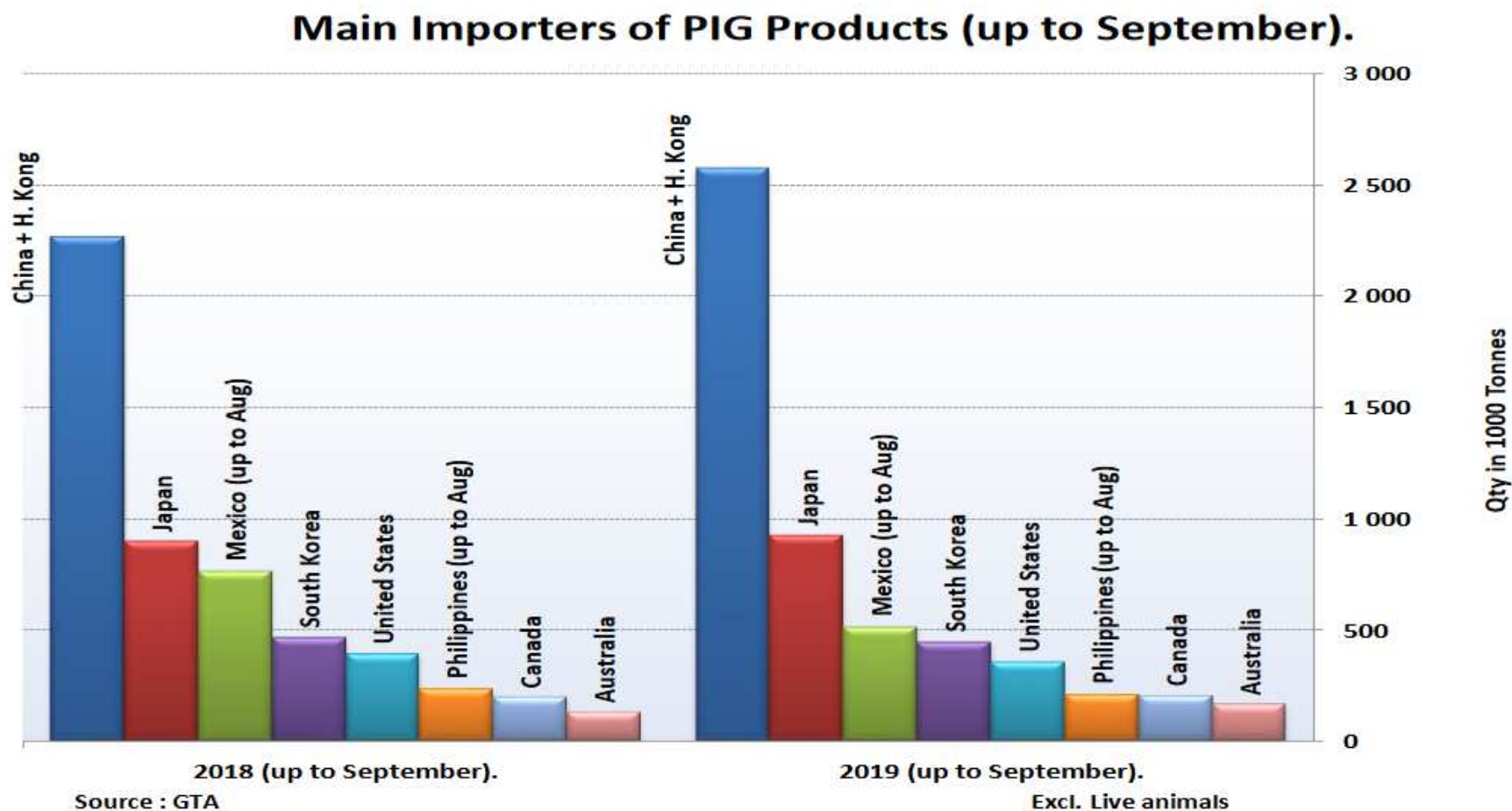
Figure 5

Top 10 export flows 2017 ('000 t)



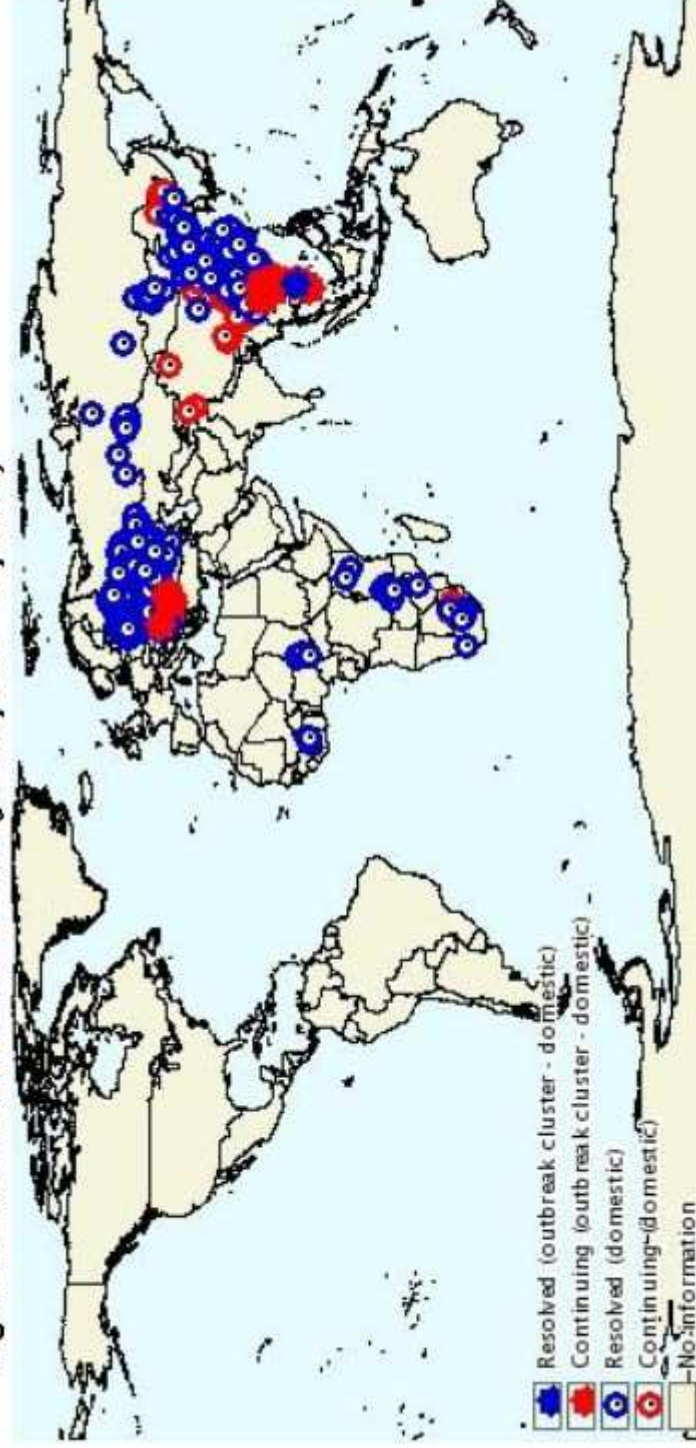
Source for both maps: UNComtrade 07.18

Nejvýznamnější importéři vepřového masa



Prasečí chřipka

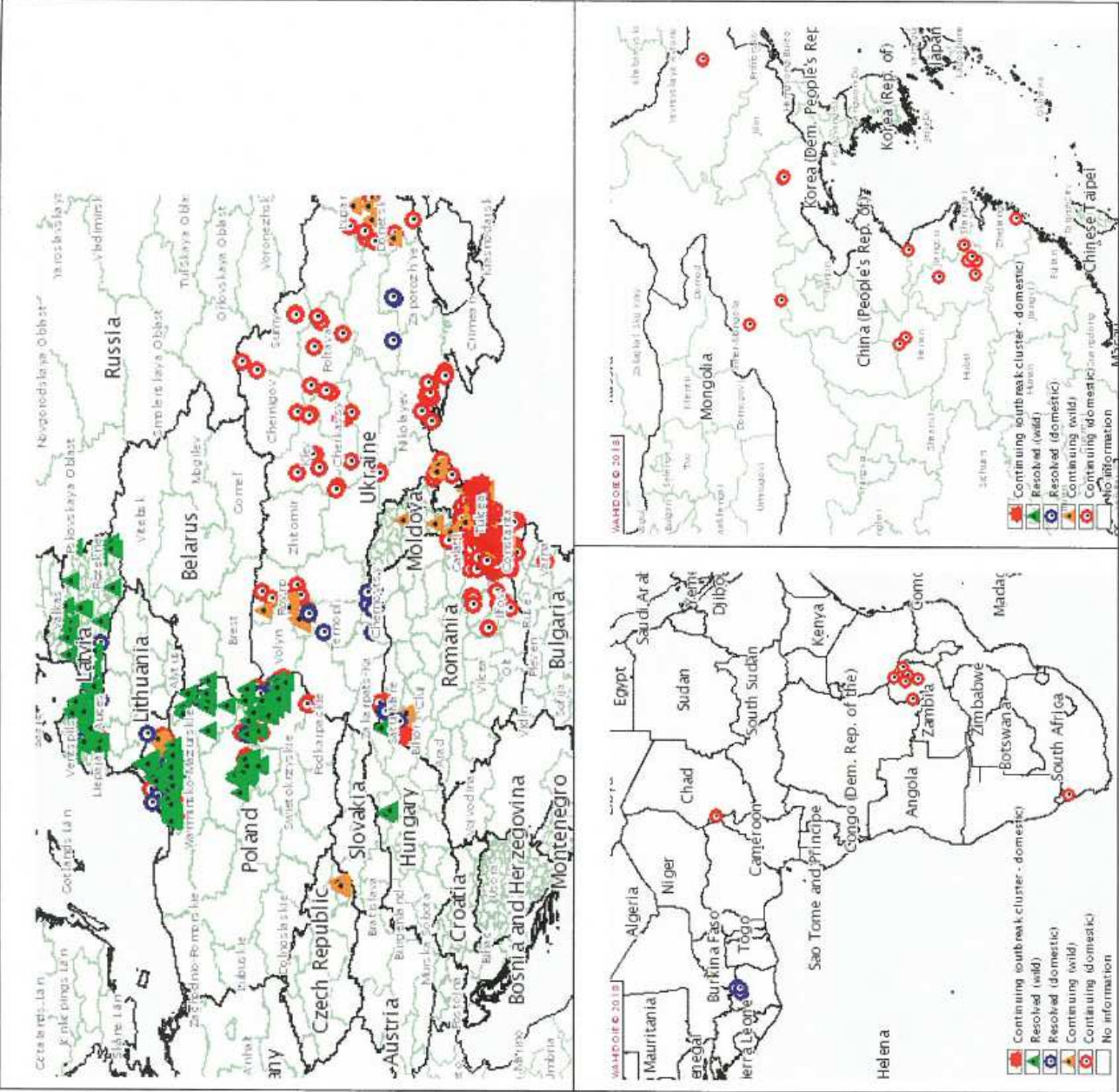
Figure 1. Global Distribution of ASF (January 2017-May 2019)



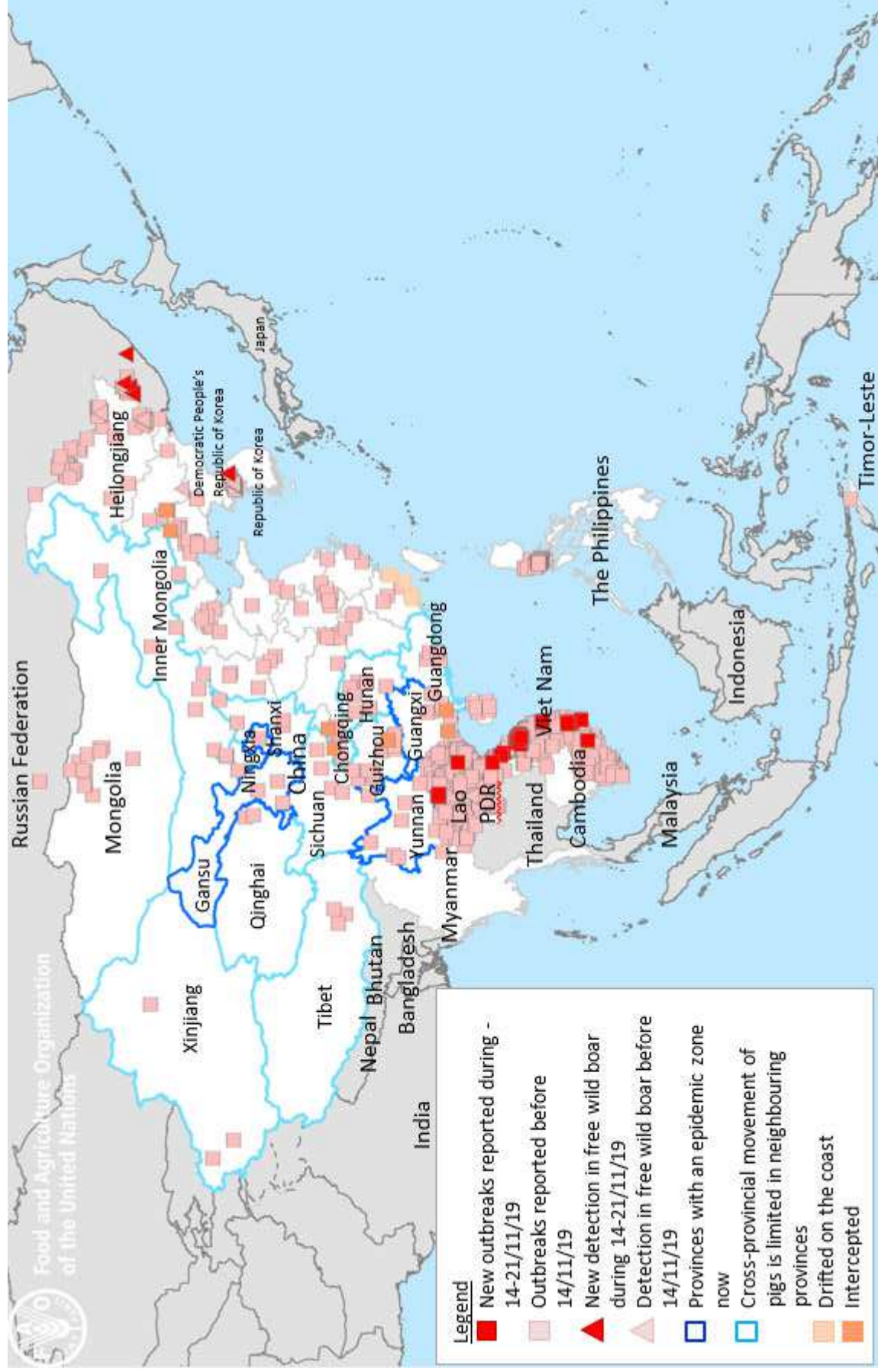
Source: OIE, World Animal Health Information Database, accessed May 15, 2019.

Figure 9

African Swine fever cases 01.08.-21.09. 2018



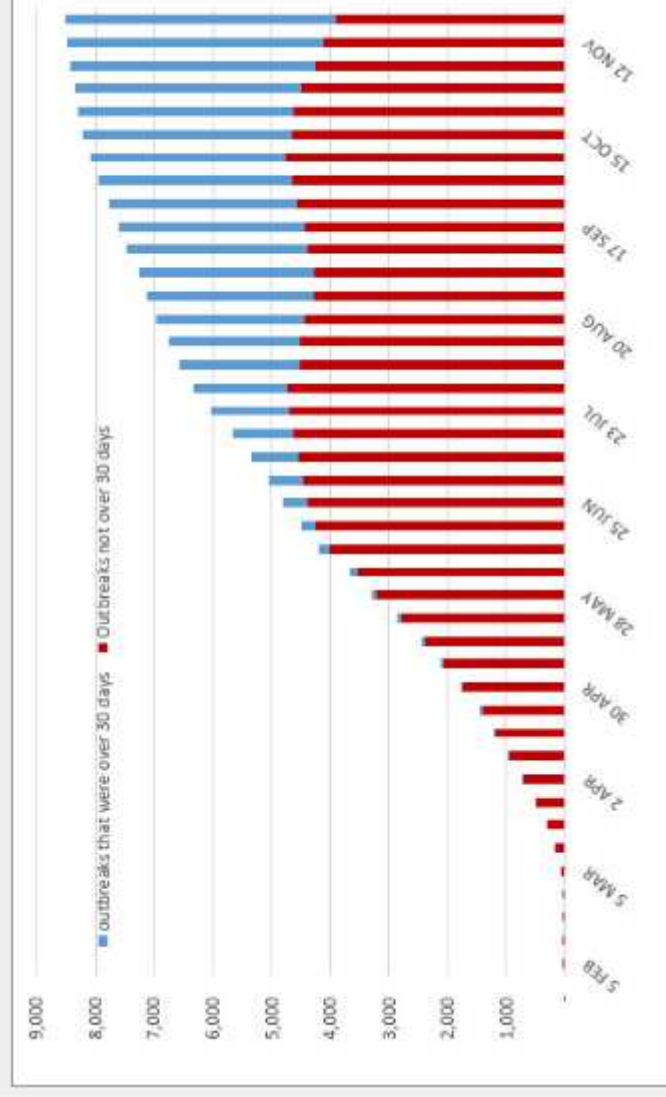
Source: OIE, 21.09.2018



Nejen Čína.....

- **Affected provinces:**
China: Anhui, Heilongjiang, Henan, Jilin, Liaoning, Jiangsu, Zhejiang, Shanxi, Yunnan, Hunan and Guizhou, Hubei, Jiangxi, Fujian, Sichuan, Shaanxi, Qinghai, Guangdong, Gansu, Shandong and Hainan Provinces, Tianjin, Chongqing, Shanghai and Beijing Municipalities, Inner Mongolia, Ningxia Hui, Guangxi Zhuang, Xinjiang Uygur and Tibet (Xizang) Autonomous Regions and Hong Kong Special Administrative Region (SAR).
- Mongolia: Bulgan, Darkhan-Uul, Dundgovi, Orkhon, Selenge, Töv Provinces and Ulaanbaatar.
- Viet Nam: Hung Yen, Thai Binh, Thanh Hoa, Ha Nam, Hai Duong, Dien Bien, Hoa Binh, Thai Nguyen, Quang Ninh, Ninh Binh, Nam Dinh, Bac Kan, Lang Son, Nghe An, Son La, Bac Ninh, Thua Thien-Hue, Bac Giang, Lai Chau, Quang Tri, Vinh Phuc, Cao Bang, Khanh Hoa, Hau Giang, Vinh Long, Dong Nai, Phu Tho, Yen Bai, Binh Phuoc, Lao Cai, An Giang, Ha Tinh, Quang Nam, Dak Nong, Kien Giang, Soc Trang, Dong Thap, Gia Lai, Ha Giang, Tuyen Quang, Binh Duong, Ca Mau, Quang Ngai, Dak Lak, Tien Giang, Kon Tum, Bac Lieu, Bình Định, Tra Vinh, Binh Thuan, Quang Binh, Long An, Phu Yen, Ba Ria - Vung Tau, Lam Dong, Ben Tre Provinces, Tay Ninh, Ninh Thuan Provinces, Hai Phong, Ha Noi, Can Tho, Da Nang and Ho Chi Minh Cities.
- Cambodia: Ratanakiri, Tboung Khmum, Svay Rieng, Takeo and Kandal Provinces.
- Democratic People's Republic of Korea: Chagang-Do.
- Lao People's Democratic Republic: Salavan, Savannakhét, Xékong, Xaisomboun, Xiangkhouang, Houaphan, Phongsali, Bolikhamxai, Louangphabang, Khammouan, Oudômxai, Vientiane, Luang Namtha, Attapeu, Bokèo, Champasak, Sainyabuli Provinces, and Vientiane Capital.
- Myanmar: Shan State.
- The Philippines: Rizal, Bulacan, Pampanga, Pangasinan, Nueva Ecija, Cavite Provinces and Metro Manila (Caloocan, Malabon and Quezon Cities).
- Republic of Korea: Gyeonggi-do, Gangwon-do* and Incheon City. (* wild boar only)
- Timor-Leste: Dili City.

Figure 2. Cumulative number of affected communes/week in Viet Nam



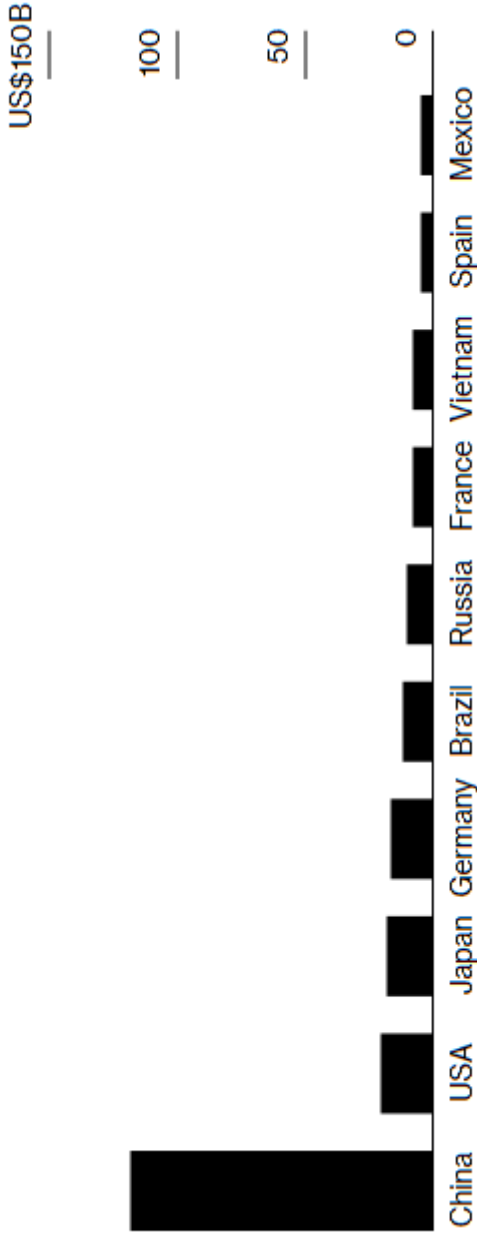
(Calculated figure)

Dopady na Čínu

Boss Hog

China's \$118 billion market dominates global pork sales

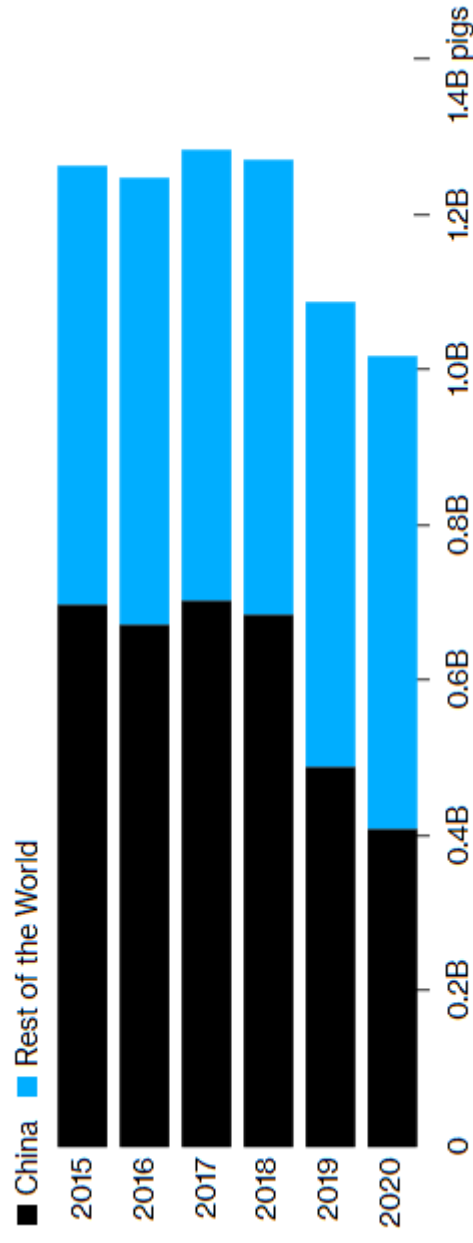
■ 2018 retail sales



Source: Euromonitor International

Hog Apocalypse

China's annual pig production has been savaged by African swine fever



Source: U.S. Department of Agriculture
2019 & 2020 are forecasts

China: Pork imports, January-September 2018 and 2019

Country	2018 Imports Jan.-Sept.	2019 Imports Jan.-Sept.	Percent change (2019/2018)	2018 Share of Chinese Imports	2019 Share of Chinese Imports
	MT	MT	%	%	%
World	923,053	1,325,700	43.6		
Other E.U.*	171,360	256,067	49.4	18.6	19.3
Spain	173,426	247,071	42.5	18.8	18.6
Germany	173,703	221,567	27.6	18.8	16.7
Canada	124,153	171,539	38.2	13.5	12.9
Brazil	108,423	143,983	32.8	11.7	10.9
U.S.	80,466	139,428	73.3	8.7	10.5
Denmark	55,887	88,729	58.8	6.1	6.7
Chile	34,241	50,904	48.7	3.7	3.8
Mexico	1,397	6,416	359.3	0.2	0.5

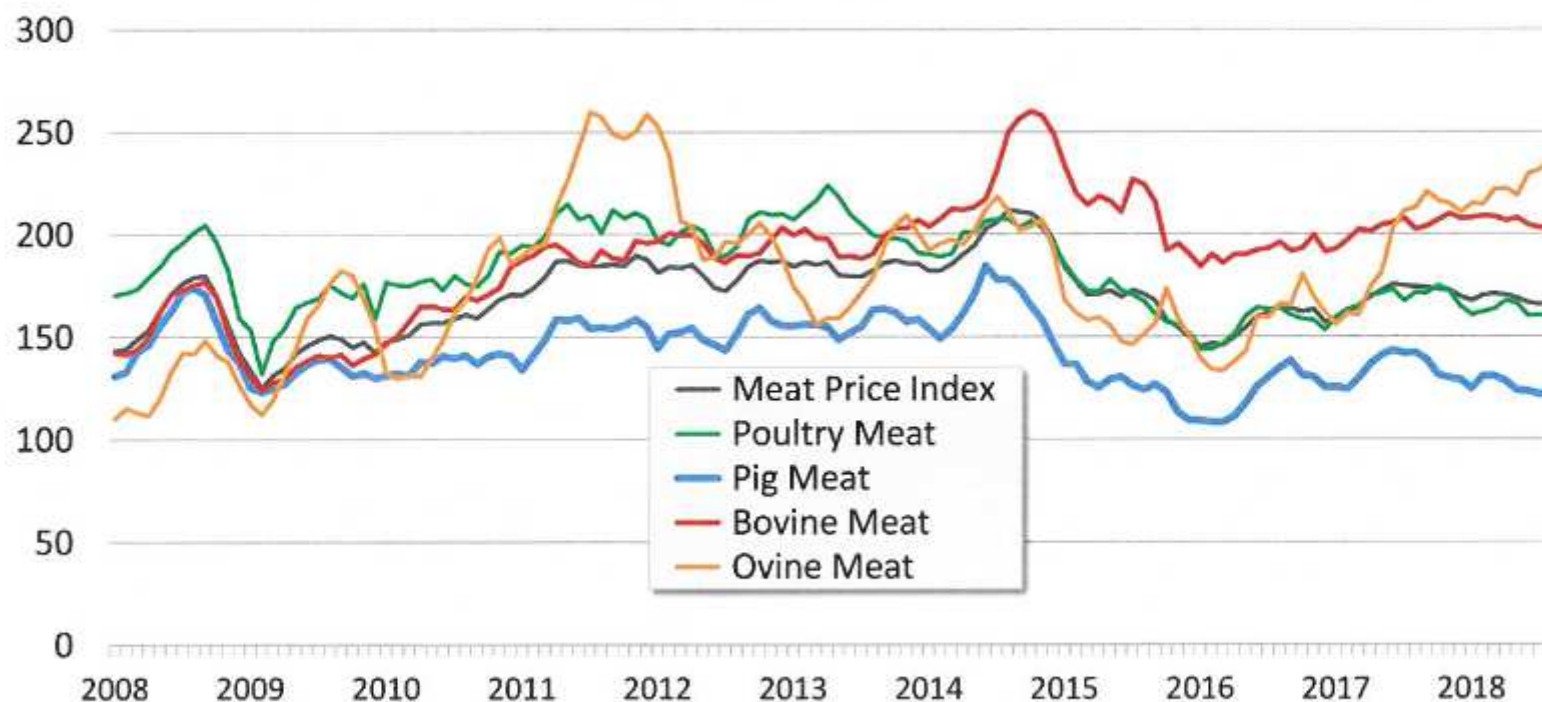
*Other E.U.= E.U. member countries other than Germany, Spain, and Denmark.
Source: Trade Data Monitor.

Ceny vepřového masa

Vývoj cen vepřového masa ve vztahu k ostatním kategoriím

Figure 6

Global pig price developments January 2008 to August 2018

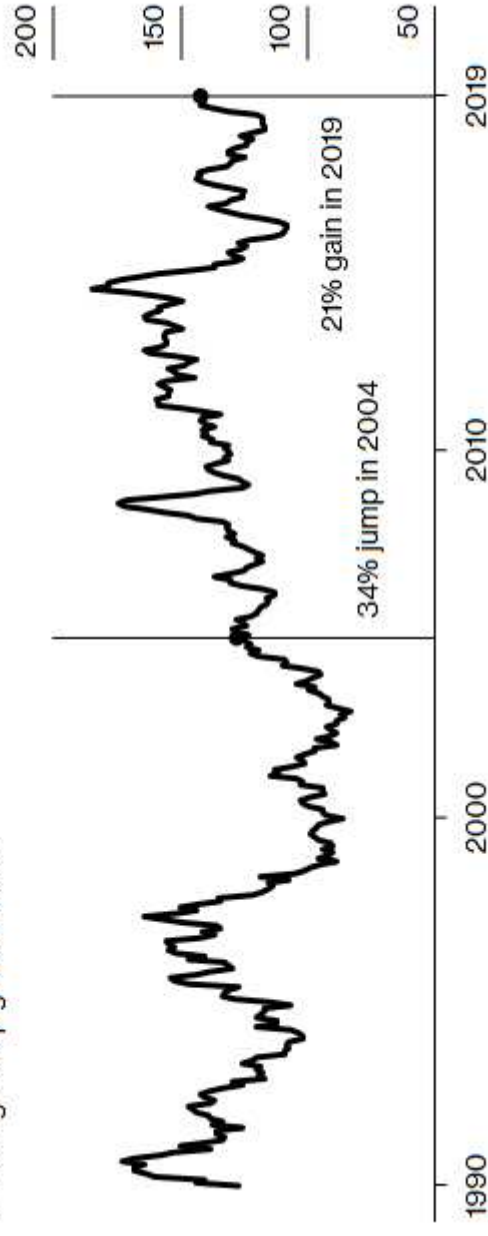


Source: FAO meat price index 09.18

Run on Pigs

Pork is heading for the steepest annual increase in 15 years

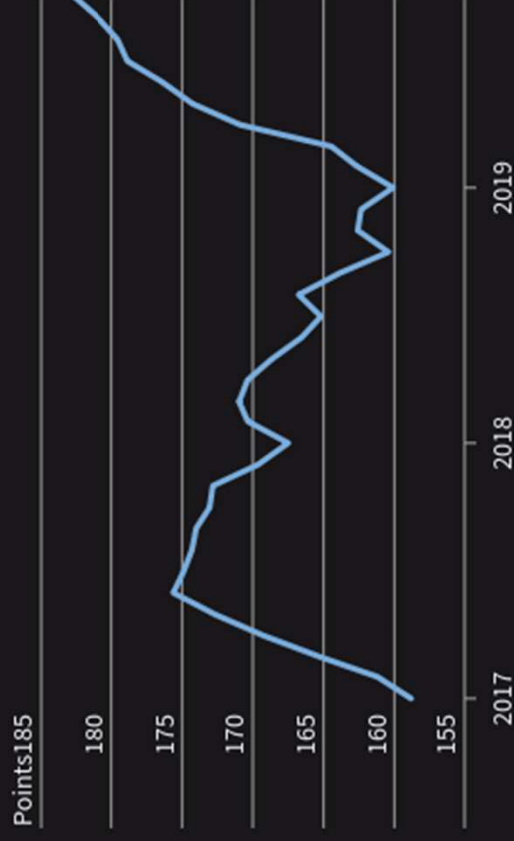
✓ FAO global pig meat index



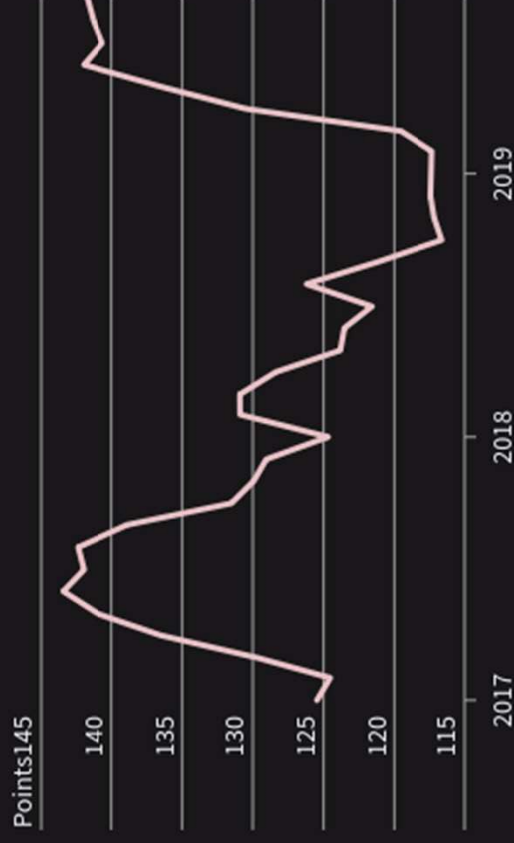
Source: Food & Agriculture Organization of the United Nations

Global meat prices climb sharply

FAO MEAT PRICE INDEX

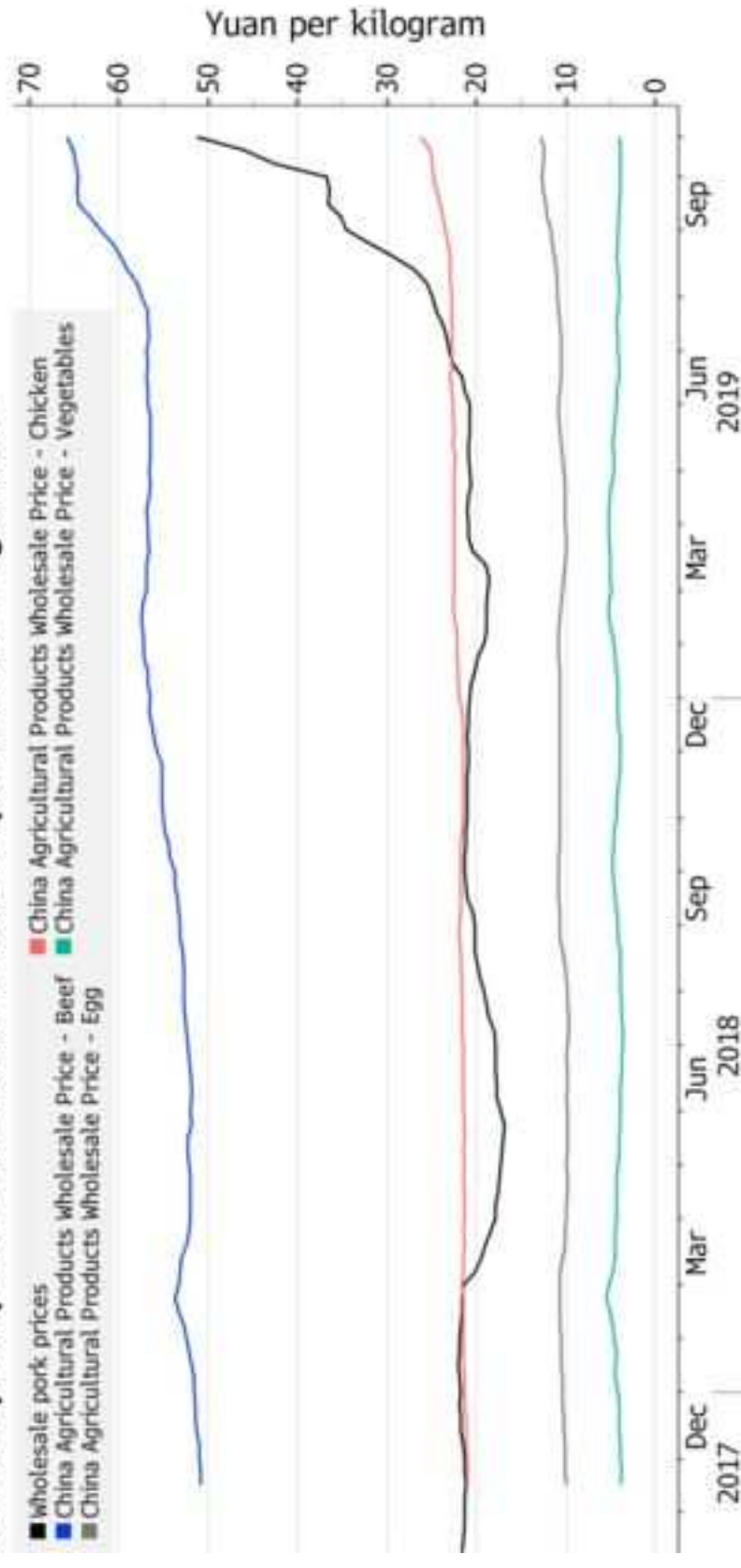


FAO PIG MEAT PRICE INDEX



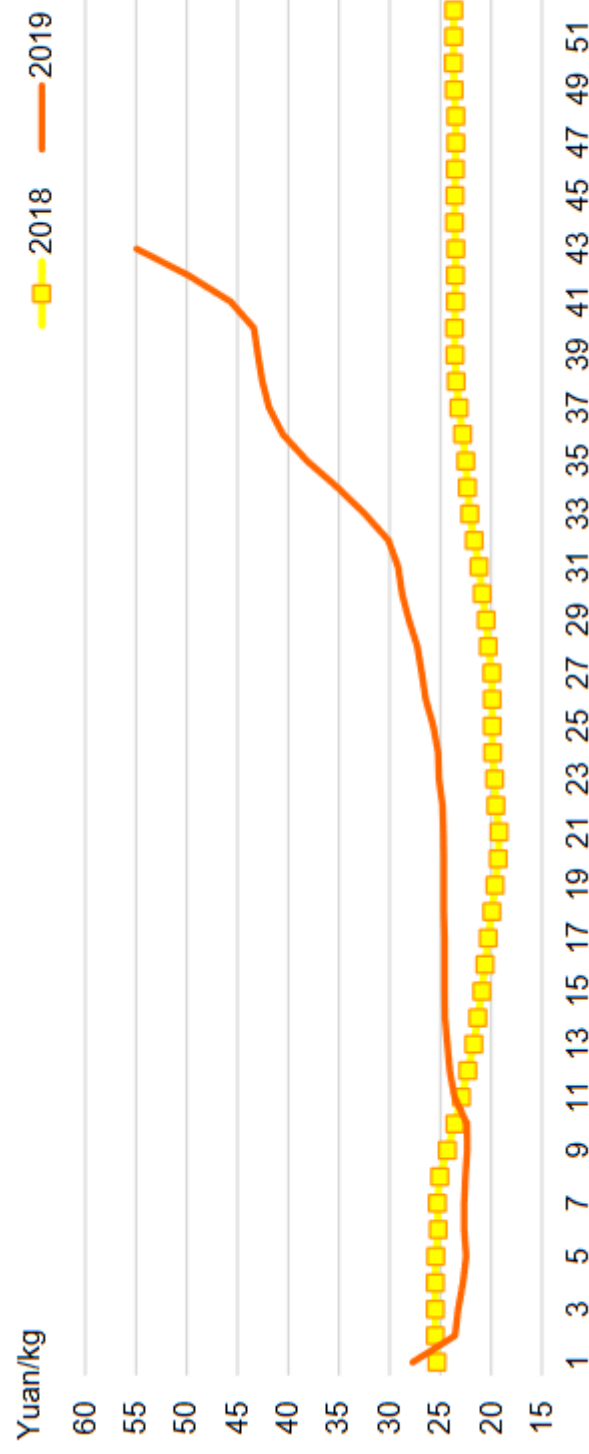
Too High To Bear

China's pork prices rise faster ahead of peak consuming season



Source: Bloomberg

China: weekly pork prices, 2018-October 2019

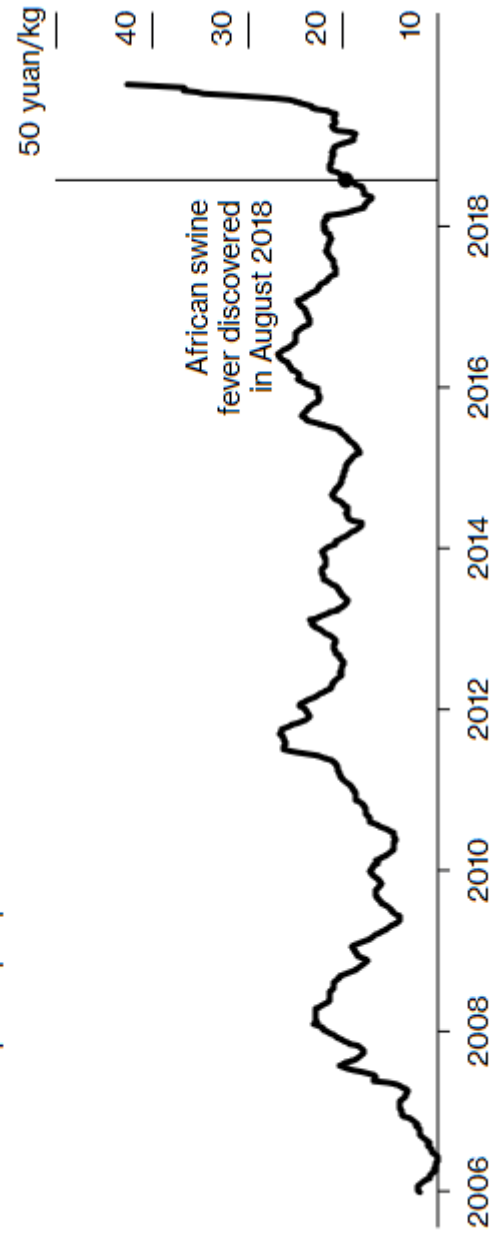


Source: China Ministry of Agriculture.

Peak Pork

Prices in China have surged 120% since deadly pig outbreak reported

✓ Wholesale pork spot price

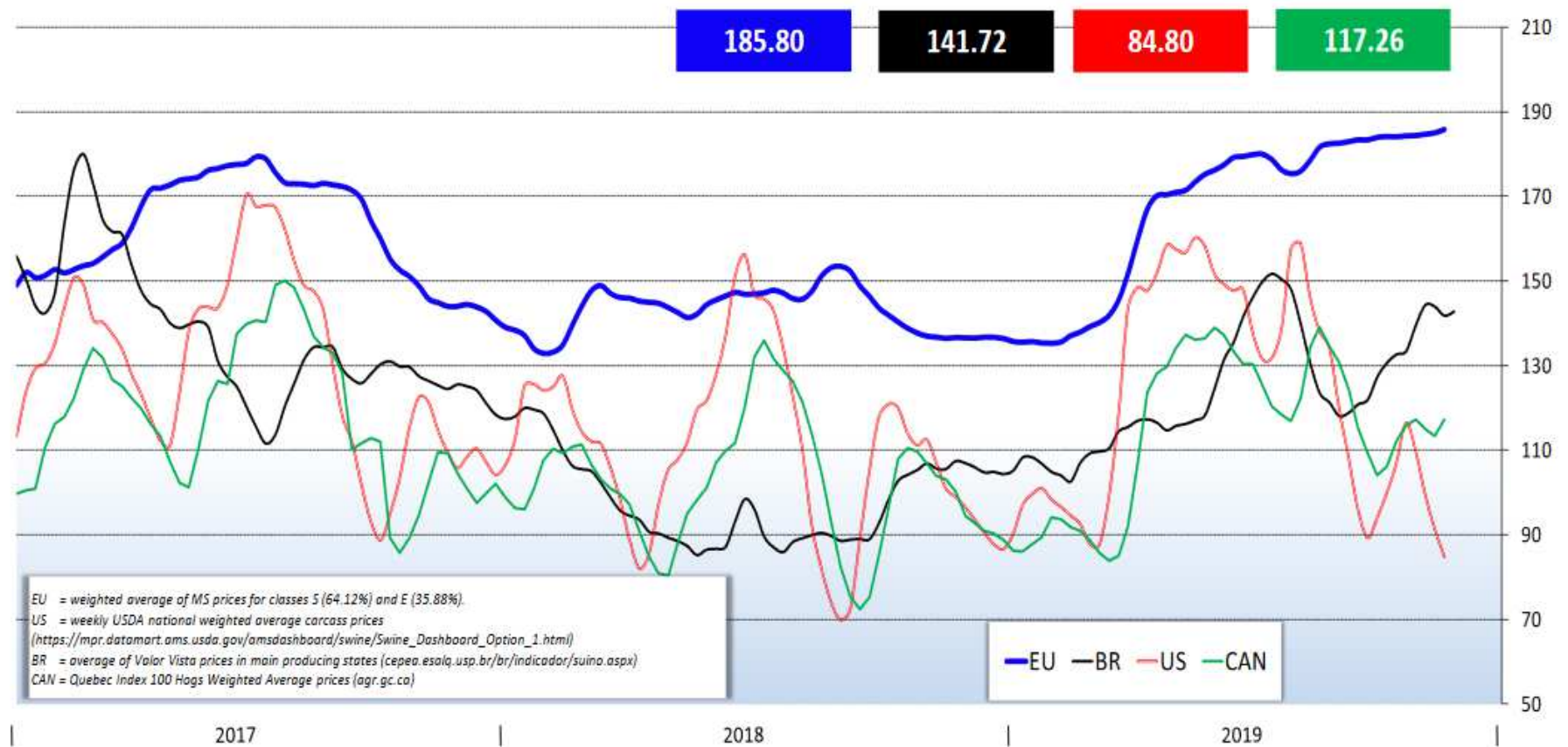


Source: China Ministry of Commerce

Evropská Unie – trh s vepřovým masem

Ceny v EU se výrazně odlišují

World weekly average Pig prices 2016 - 2019 in Euro/ 100kg carcass
(EU, Brazil, Canada and USA)



EU – stavy prasat

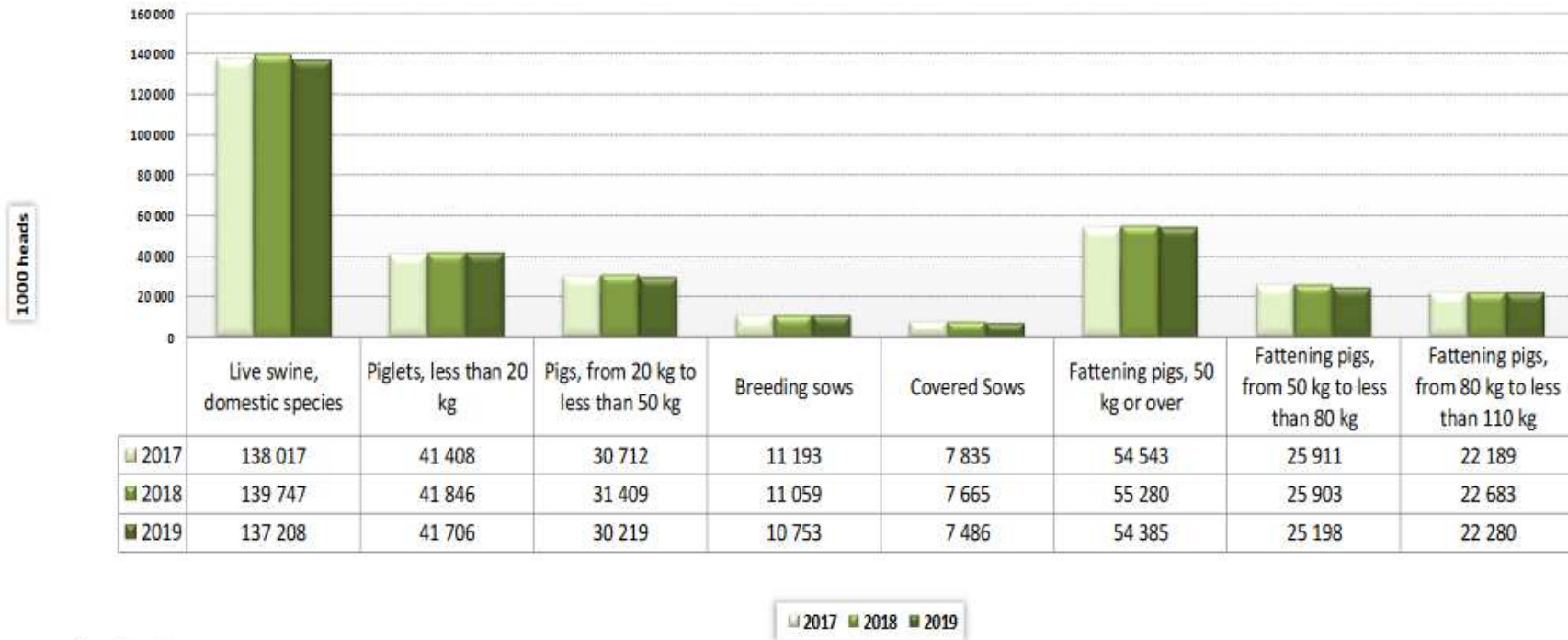
Swine

Animal Numbers, Swine	2017		2018		2019	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning Stocks	147,188	147,188	150,112	150,000	0	148,900
Sow Beginning Stocks	12,022	12,022	12,189	12,153	0	12,000
Production (Pig Crop)	267,500	267,000	271,500	271,500	0	269,000
Total Imports	6	6	5	8	0	8
Total Supply	414,694	414,194	421,617	421,508	0	417,908
Total Exports	340	339	350	600	0	500
Sow Slaughter	4,020	3,686	4,150	3,850	0	3,800
Other Slaughter	254,680	254,566	259,350	262,150	0	259,700
Total Slaughter	258,700	258,252	263,500	266,000	0	263,500
Loss	5,542	5,603	5,617	6,008	0	5,708
Ending Inventories	150,112	150,000	152,150	148,900	0	148,200
Total Distribution	414,694	414,194	421,617	421,508	0	417,908
(1000 HEAD)						

Not Official USDA data. Source: Eurostat and FAS Offices in the EU.

Produkce prasat v zemích EU

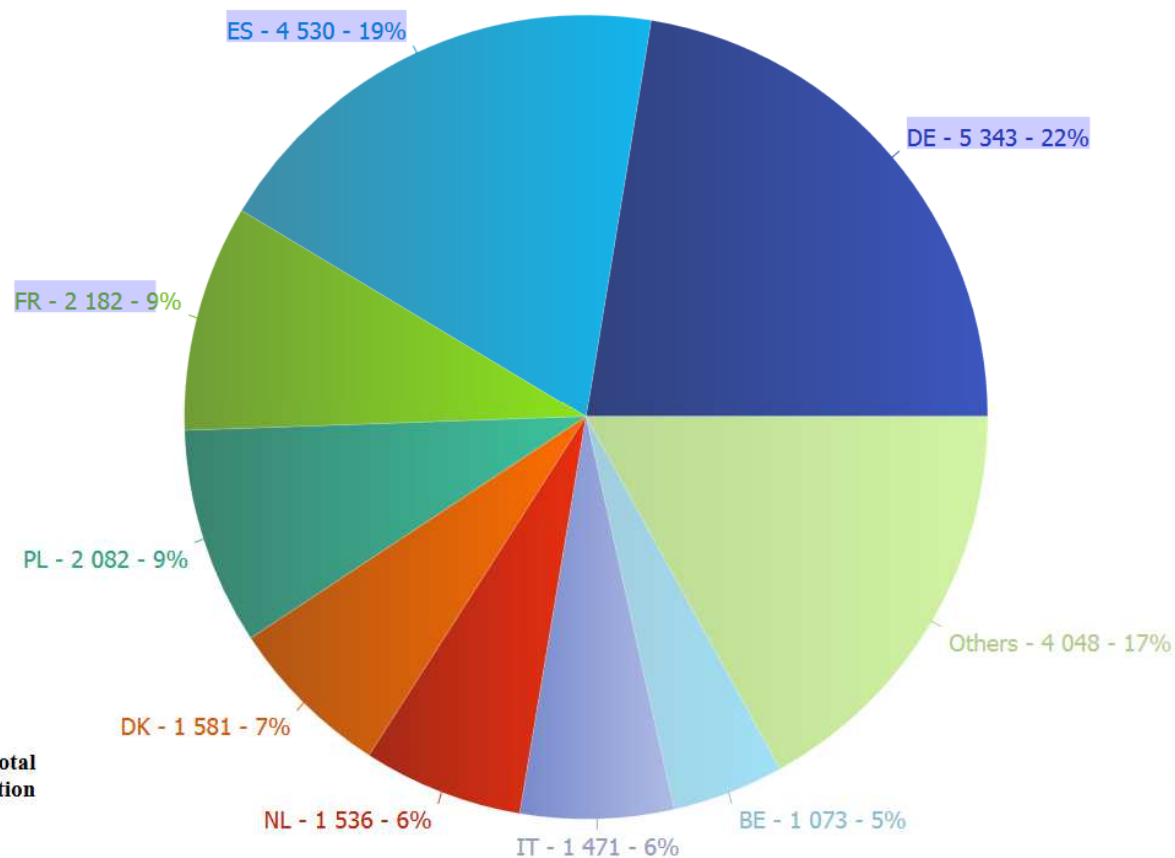
Pig population - Livestock survey results May-June 2019



Source: Eurostat

Nejvýznamnější producenti vepřového masa v EU

EU Main Producers (1000 tonnes product weight)

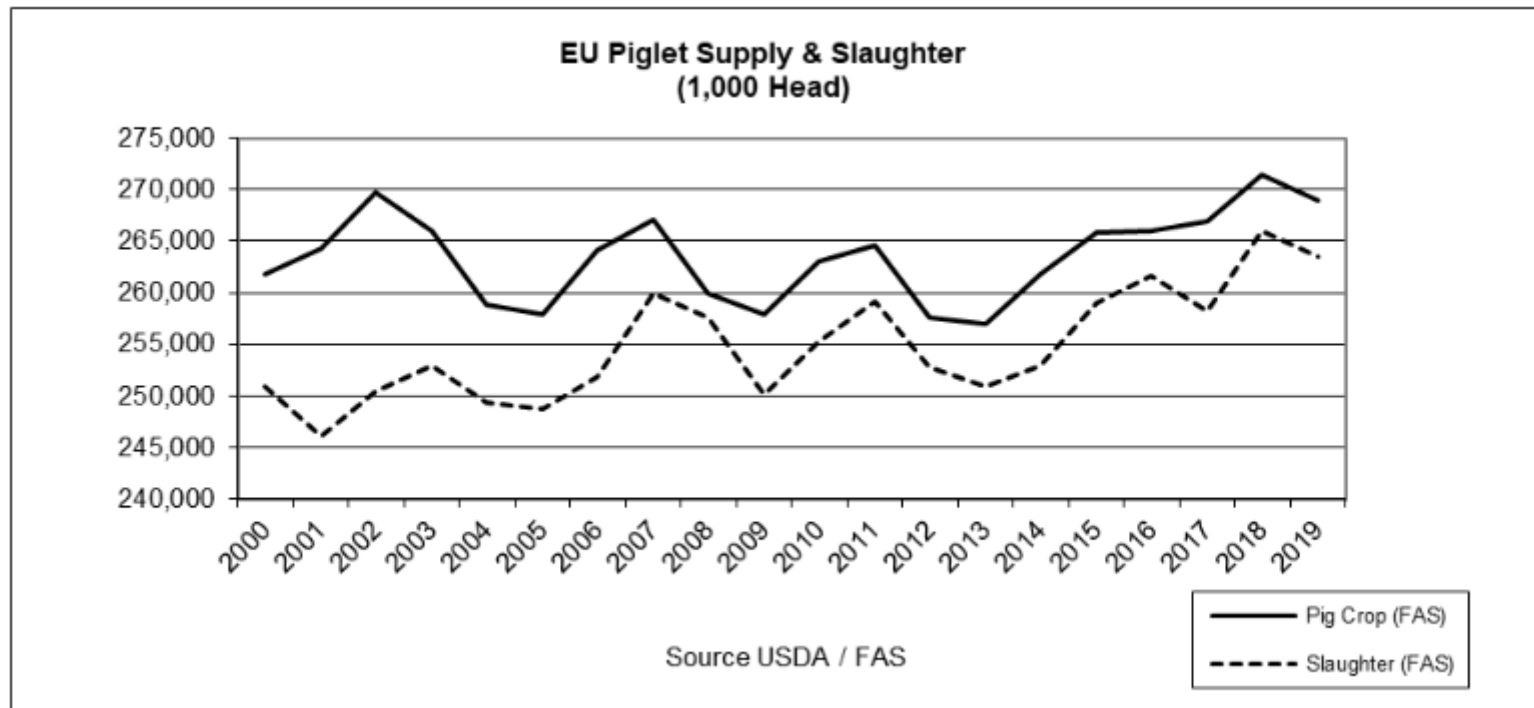


8 MSs = 83% of total
EU production

Source: Eurostat

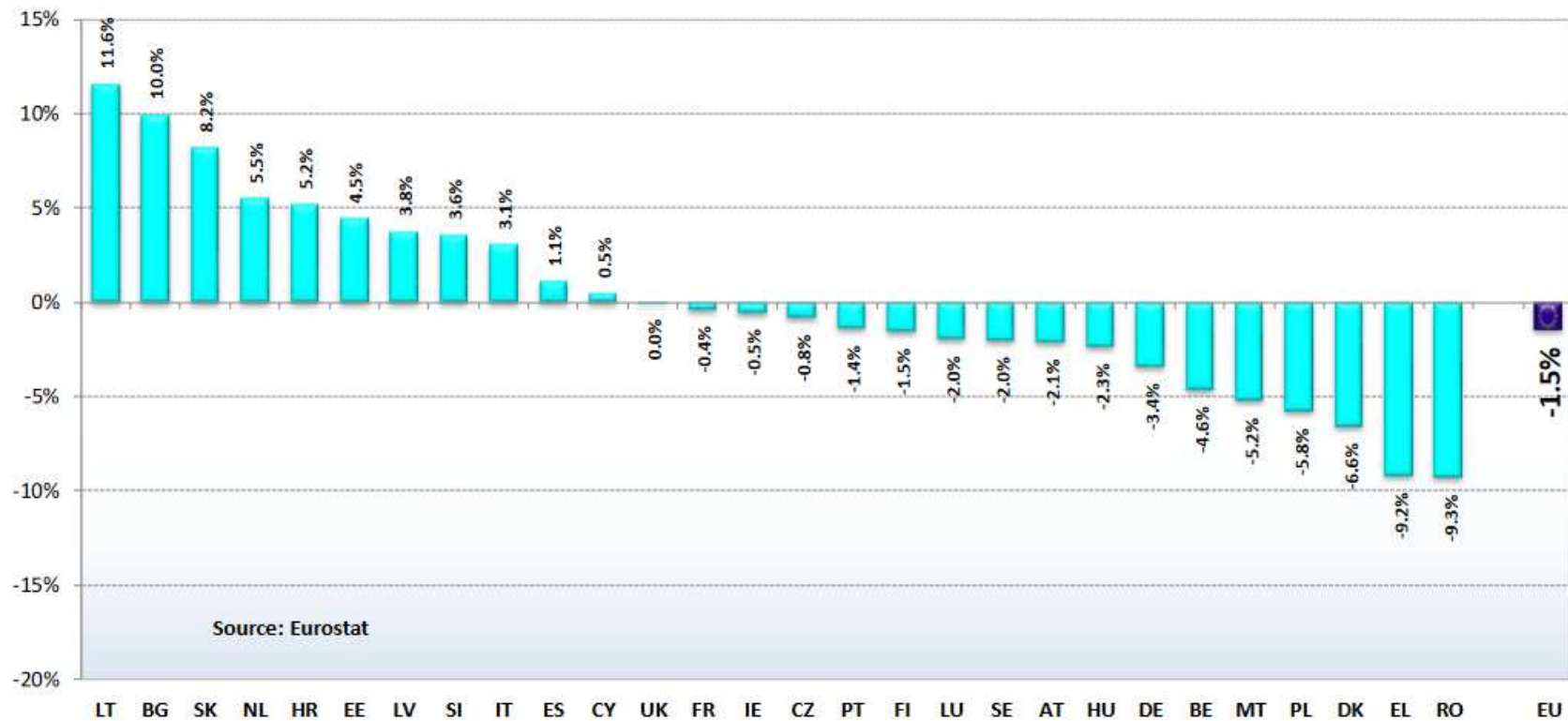
Year 2018
Total EU = 23846
(+2,1% over 2017)

EU – stavy prasat

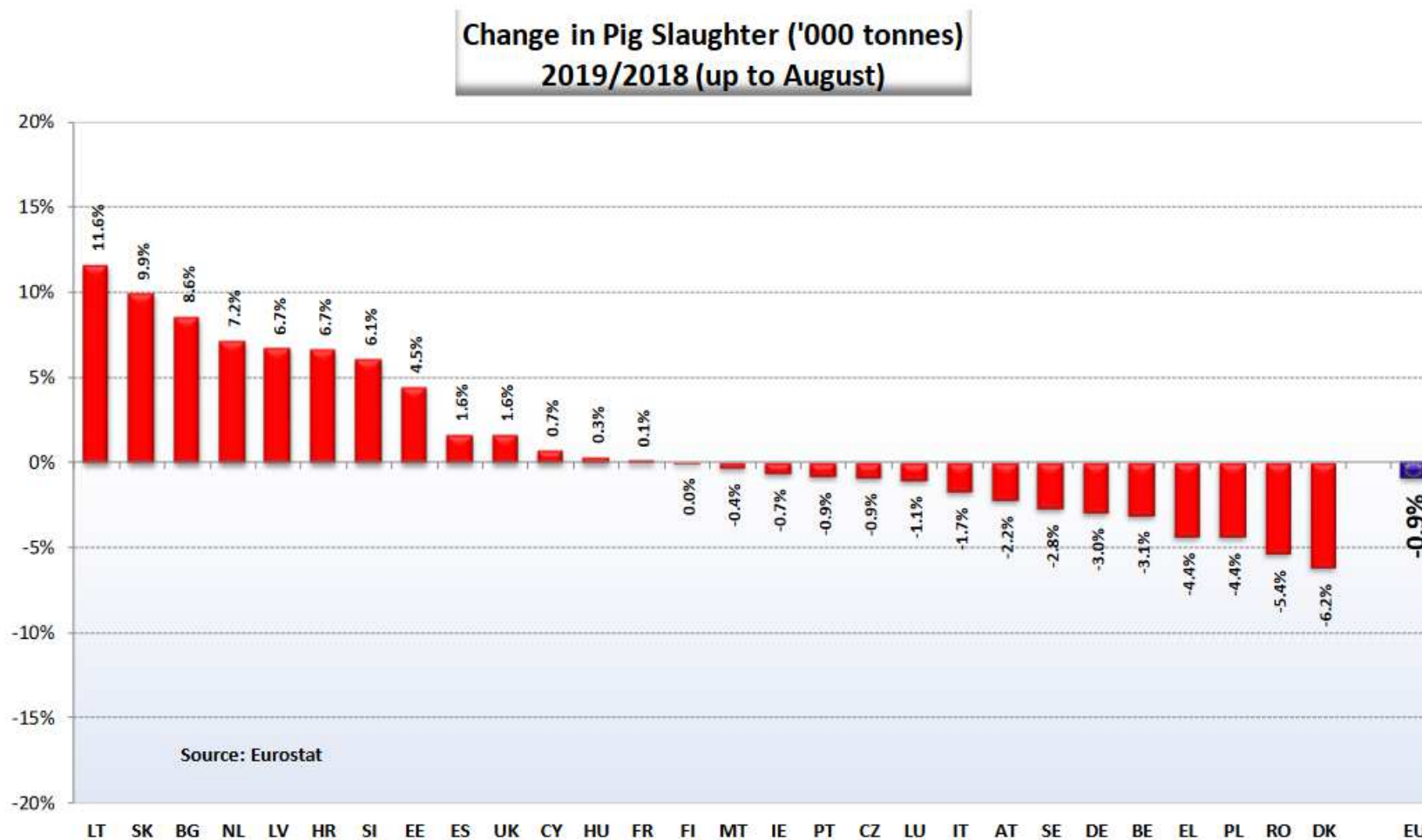


Meziroční změny v produkci prasat v zemích EU (v tis. kusů)

Change in Pig Slaughter ('000 Heads)
2019/2018 (up to August)



Meziroční změny v produkci prasat v zemích EU (v tis. tun)



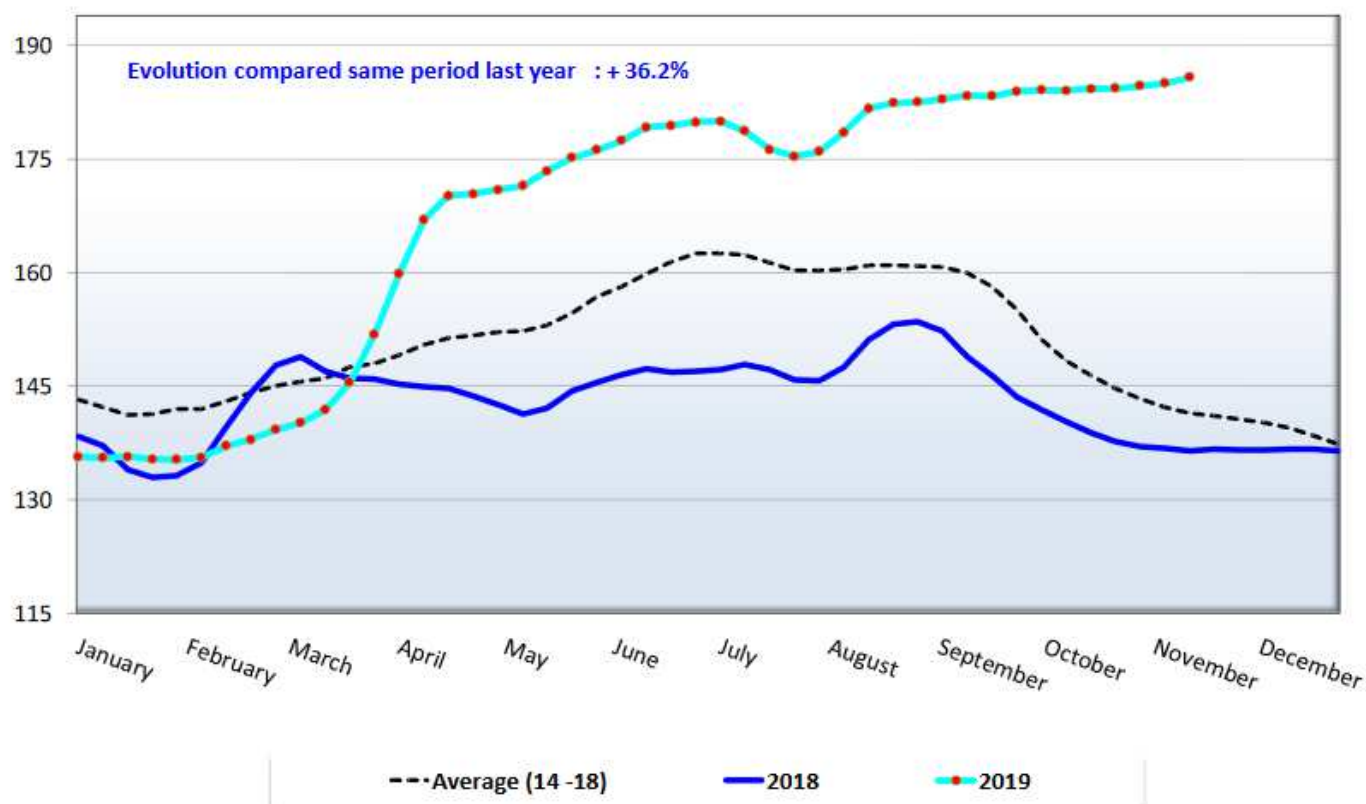
Ceny v EU – vývoj v posledním roce

EU Prices	EU Prices	46		Evolution since last week	Evolution since last month	Evolution since last year
	Average (S-E)	185.8	€/100 kg carcass weight	+ 0.4%	+ 0.8%	+ 36.2%
	Class S	186.5		+ 0.5%	+ 0.8%	+ 36.2%
	Class E	184.5		+ 0.4%	+ 0.9%	+ 36.0%
	Piglet	57.9	€/head	+ 2.8%	+ 9.3%	+ 63.7%

Ceny v EU – vývoj v letech 2018 a 2019 (srovnání)

evolution of the EU pig carcass prices (average class E & S)

Week 46 latest price ==> 185.80 EUR/100 kg/cw



Vývoj ceny vepřového v jednotlivých zemích EU za tunu carcasu

Classe E		
	Oct-2018	Oct-2019
EL	172.50	207.96
CY	185.91	202.25
BG	172.30	199.07
SI	153.39	194.84
RO	146.04	193.04
PT	157.87	192.13
HU	144.31	192.02
DE	141.48	190.32
AT	143.38	188.77
SK	145.74	188.40
HR	144.19	185.68
DK	126.89	183.46
FR	131.35	181.00
CZ	138.60	179.82
LV	143.00	179.71
ES	136.13	179.54
IE	139.97	178.62
PL	134.73	178.17
UK	165.23	178.16
LT	135.71	174.24
NL	121.62	172.43
EE	148.28	170.47
SE	164.12	168.05
FI	163.28	165.58
BE	104.47	154.82
EU	138.08	182.74

Classe S		
	Oct-2018	Oct-2019
SI	162.05	209.93
EL	172.50	207.96
AT	155.22	200.17
HU	148.41	194.92
DE	144.39	193.75
SK	147.84	193.19
RO	149.26	193.08
PT	156.77	192.90
DK	132.24	190.50
FR	139.35	189.19
HR	146.85	185.79
CZ	142.53	184.92
ES	140.19	181.34
UK	168.21	181.28
PL	137.29	181.08
IE	140.09	179.02
EE	154.64	177.12
LT	139.43	176.75
LV	140.19	176.21
NL	122.76	173.28
SE	168.10	171.50
FI	168.60	170.52
BE	111.67	162.37
EU	140.21	185.06

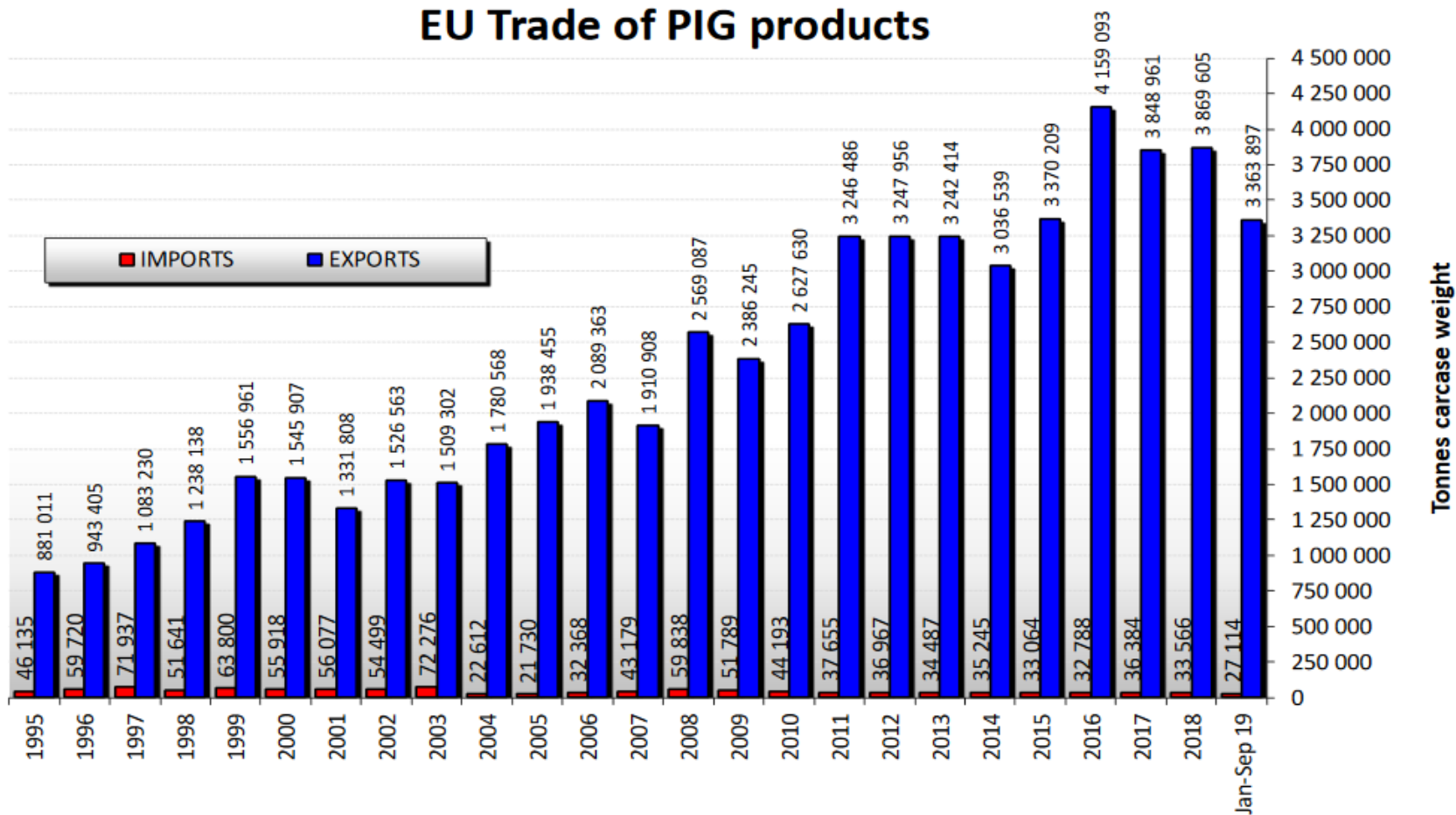
Classe R		
	Oct-2018	Oct-2019
IT	198.04	212.90
LV	115.55	179.36
SK	128.02	177.46
ES	141.16	168.64
DE	114.55	160.31
LT	125.89	158.83
FI	138.92	134.06
UK	125.83	121.55
DK	97.59	
EU	165.86	207.54

Vývoj Exportu a Importu ze zemí EU

European
Commission

EU trade of PIG products

EU Trade of PIG products



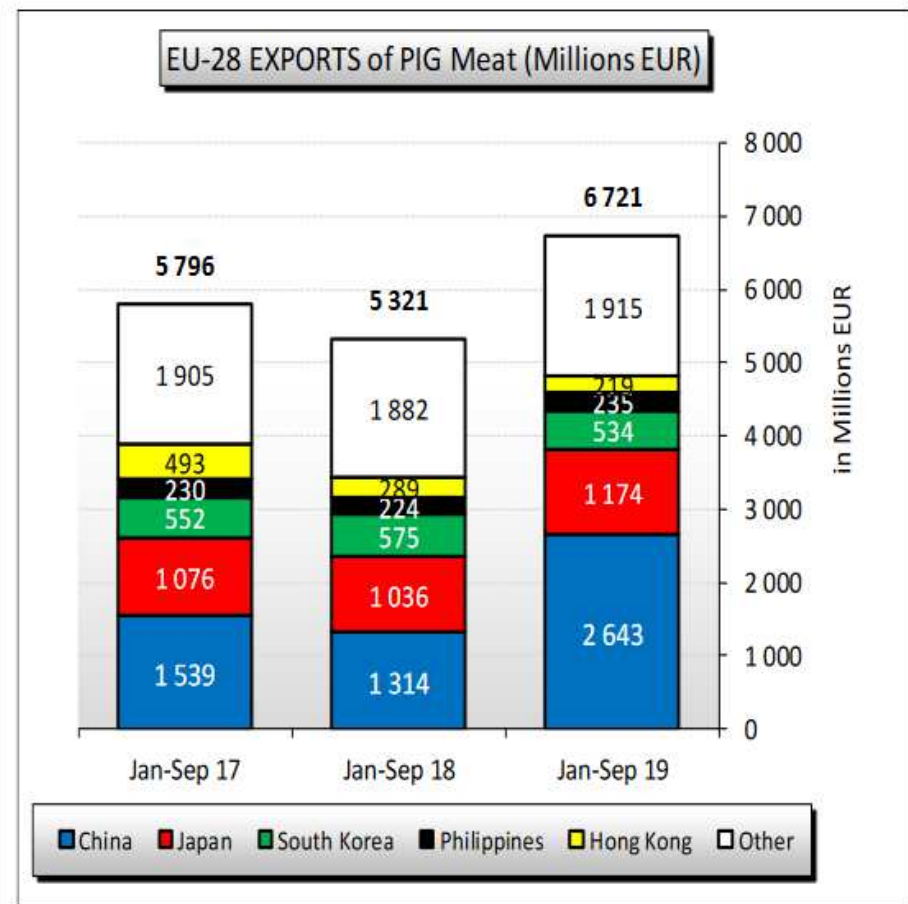
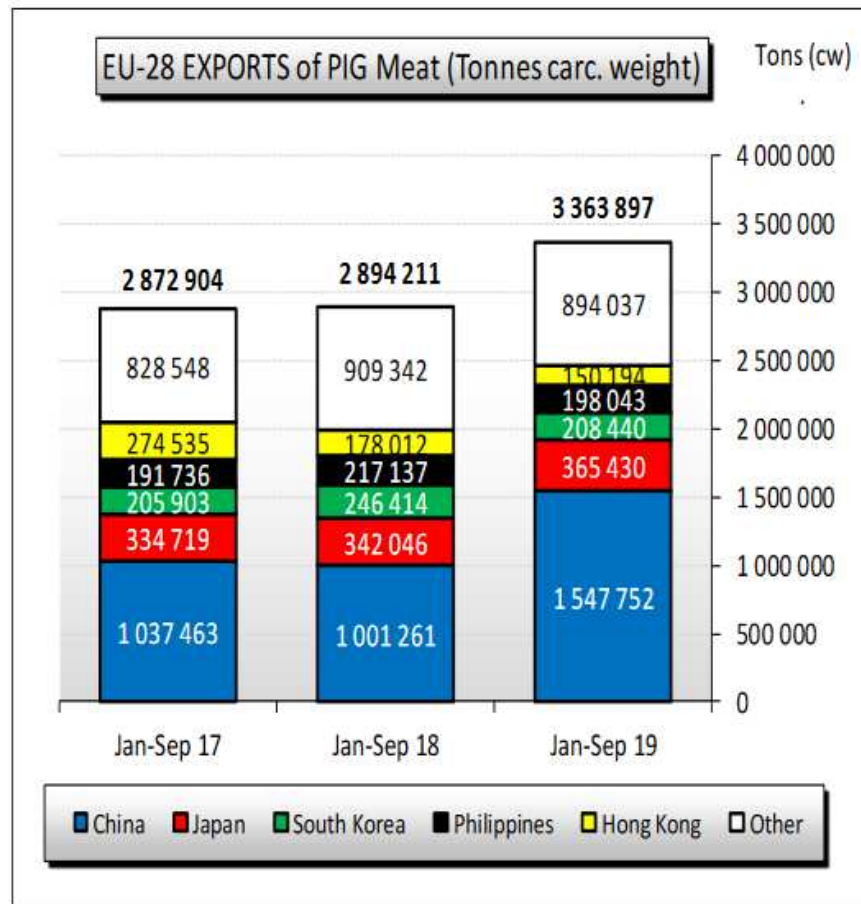
Nejvýznamnější destinace exportu zemí EU

EU exports of selected PIG products: Trade figures (COMEXT – tonnes carcass weight)

	2015		2016		2017		2018		Jan-Sep 19		Compared to Jan-Sep 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
China	1 141 484	33.9%	1 866 110	44.9%	1 406 733	36.5%	1 353 489	35.0%	1 547 752	46.0%	+ 55%
Japan	364 745	10.8%	405 311	9.7%	425 761	11.1%	433 429	11.2%	365 430	10.9%	+ 7%
South Korea	241 569	7.2%	260 593	6.3%	276 136	7.2%	335 126	8.7%	208 440	6.2%	- 15%
Philippines	191 891	5.7%	216 514	5.2%	251 492	6.5%	284 044	7.3%	198 043	5.9%	- 9%
Hong Kong	292 651	8.7%	363 251	8.7%	383 948	10.0%	231 825	6.0%	150 194	4.5%	- 16%
USA	105 123	3.1%	116 806	2.8%	155 461	4.0%	165 460	4.3%	105 954	3.1%	- 19%
Australia	102 645	3.0%	101 174	2.4%	95 351	2.5%	96 870	2.5%	86 710	2.6%	+ 24%
Vietnam	38 290	1.1%	53 483	1.3%	41 637	1.1%	86 357	2.2%	75 317	2.2%	+ 28%
Ukraine	96 619	2.9%	75 547	1.8%	86 944	2.3%	107 065	2.8%	69 798	2.1%	- 12%
Taiwan	53 701	1.6%	47 825	1.1%	64 443	1.7%	55 537	1.4%	44 542	1.3%	+ 3%
Serbia	47 488	1.4%	41 151	1.0%	54 924	1.4%	65 583	1.7%	37 348	1.1%	- 28%
Ivory Coast	50 240	1.5%	36 825	0.9%	41 475	1.1%	52 288	1.4%	36 116	1.1%	+ 6%
Other	643 762	19.1%	574 504	13.8%	564 656	14.7%	602 533	15.6%	438 252	13.0%	
Extra-EU	3 370 209		4 159 093		3 848 961		3 869 605		3 363 897		
% change			+ 23%		- 7%		+ 1%		+ 16.2%		

Čína jako klíčová destinace

EU exports of selected PIG products Trade figures (COMEXT – tonnes carcass weight)



Faktory ovlivňují trh s vepřovým masem

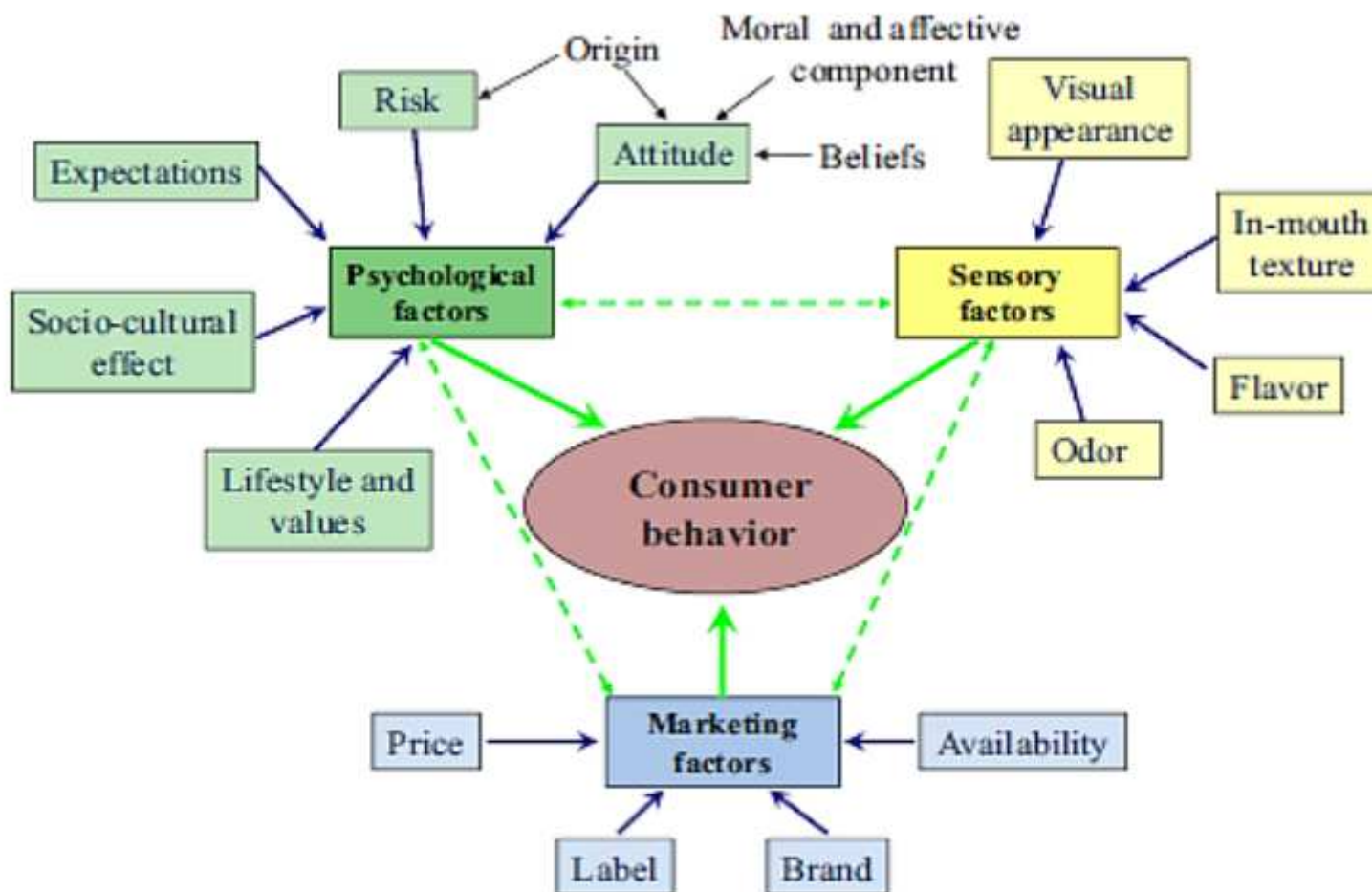


Figure 1. Multidisciplinary model of the main factors affecting consumer behavior in a food domain.

Děkuji za pozornost

Model transparency cen v potravinové vertikále - vepřové maso

TAČR – Program na podporu aplikovaného společenskovedního a
humanitního výzkumu, experimentálního vývoje a inovací ÉTA

PID: TL01000180

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Kontaktní osoba:

prof. Ing. Luboš Smutka, Ph.D.

smutka@pef.czu.cz

doc. Ing. Ludmila Dömeová, CSc.

domeova@pef.czu.cz