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SITUATION AND PESPECTIVE FOR THE MEAT SECTOR IN CROATIA

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CONTENT

1 Introduction to the meat sector

In terms of human, land and other resources, family farms are the predominant type of organisation in the agricultural sector and account for the majority of total agricultural production. They own about 78% of arable land and more than 80 % of the total stock of livestock. In 2006 family farms owned 85.5% of the country's total cattle, 100% of the horses, 70.8% of the pigs, 98.4% of the sheep, 61.8% of the poultry and 99.4% of the beehives. Small production units prevail, especially for cattle, pigs, sheep, goat and horse farming. In contrast, poultry production has large-scale production units for poultry meat and eggs.

Livestock production in the Republic of Croatia is 44% of total agricultural production by value. The process of transition and the war have strongly influenced livestock production: conditions have not favoured compliance with hygiene, animal welfare and environmental standards.

Cattle and beef production

Cattle production is Croatia's main branch of livestock breeding and one of the most important sub-sectors of overall agricultural production. Cattle farming, whether for milk or beef, is conducted on an extensive, not intensive basis and here is potential to raise production. 83% of cattle production is undertaken by family farms. The Simental dual-purpose (meat and milk) breed accounts for around 75% of all cattle. The number of cattle has been increasing in recent years, up by 10% between 2001 and 2006. Of the 485,000 heads 273,000 were cows and pregnant heifers. The main increase of 41% was in the production of calves, bullocks and heifers under 1 year old.

The level of self-sufficiency for beef in Croatia is around 75% in 2006.

Pigmeat production

Croatia has a long tradition in pig meat production which accounts for 33% of livestock production and 14.5% of total agricultural production. It is found in almost every part of the country, but predominates in the Pannonian region due to the area's extensive production of corn, on which pig farming is strongly dependent.

This segment is organised mostly in small production units, on family farms with 1-5 sows, accounting for 75% of production from the various family holdings. Only some of the family farms and the larger commercial farms are specialised production units with up-to-date technology that comply with EU legislation
The number of pigs has remained more or less the same, although market influences over the years have caused minor changes. The total number of breeding pigs (sows and gilts) amounts to approximately 200,000. This is quite a good foundation for setting up the desired level of production although the opportunity to ensure production of the necessary stock of fatteners has not been managed properly.

In 2005, Croatia's stocks of pigs totalled just over 1.2 million, 0.13% of world stocks. Pig meat production in 2005 was 48,500 tonnes. The 2005 stocks and production levels were roughly the same as the 2001 stocks of pigs and pig meat production.

The level of self-sufficiency for pig meat in Croatia is around 80%.

Poultry production

Poultry production is an important livestock industry providing high quality and cheap food (poultry meat and eggs) and is therefore of special interest to Croatia. Most poultry production employs high levels of production technology. Poultry production amounts to approximately 18% of livestock production and 7% of total agricultural production, and Croatia is self-sufficient.

Production is organised in large units of a few producers who sometimes co-operate with specialised family farms, especially for poultry meat production. The sector uses hybrid stock almost entirely for meat production, or laying birds for egg production.
At 93% of total poultry production, chicken production is the main sub-sector. Goose accounts for only 3% of the total and the possibilities in this area have not been fully exploited. Geese are usually fattened in a semi-intensive production system and used mostly for self-consumption or sold in local markets. Duck production represents 2% of total poultry production. This sub-sector is commonly organised on family farms that co-operate with larger firms. The share of turkey production in the poultry sector is also 2%.

Poultry numbers and production of meat and eggs showed no signs of any significant changes between 2000 and 2004. However poultry numbers decreased by 10% in 2006 compared to 2004 and amounted to 10,045,000. According to the results of a survey conducted by the Croatian poultry centre we have 620,000 layer of heavy breeds, with 40 mil. chicken and 1.2 mil. turkeys fattened. The number of fattened geese and ducks is difficult to estimate.
In the period between 2001 and 2006 Croatia produced an annual average of 96,000 tonnes of poultry weight gain (115,000 tonnes in 2006) and 810 million eggs.

Sheep/Goat production

Meat production is the main objective of the majority of the sheep farming sector in Croatia. Specific sheep breeds with different meat qualities are typical of various regions. Meat breeds prevail in the northern part of the country, while combined local breeds prevail in the central and southern regions. In addition to the genetic base, meat quality depends on holding and feeding practices, which differ from one region to another.

Croatia has a centuries-old tradition in sheep and goat farming, where many pastures and a favourable climate have encouraged the development of several indigenous breeds. The number of goats and sheep fell during the war but has recently increased considerably.

Sheep production amounts to some 4.5% of total agricultural production. More than 95% of sheep and goat production takes place on family farms. According to the data of the Central Bureau of Statistics, Croatia had 768,000 sheep and 126,000 goats in 2006. Even though the number of sheep and goats almost doubled over the last 5 years, industrial production of the meat decreased by 18% in 2005 compared to 2001.

Self-sufficiency in sheep meat is low but increasing and in 2004 amounted to 79%. [1]

[1] See additional information about other meat production in Croatia in Annex

2 Structure of the sector and recent evolutions

Croatia is a country with specific geographic problems. The large number of establishments for slaughtering, trimming and processing is a result of the relatively poor transport infrastructure in some parts of the country and also the need for fast preparation of food during the tourist season. Since the 1990s, with the gaining of political independence and the development of a more entrepreneurial culture, the interest in opening small abattoirs and meat production facilities has increased.

The majority of the abattoirs operate with outdated technology and at a low level of capacity-utilisation. In June 2005, 196 abattoirs for hard and soft-hoofed animals, of which 12 are accredited for export, and 74 poultry abattoirs, of which 13 are accredited for export, were registered with the Ministry of Agriculture, Forestry and Water Management. However, only 10 of these are accredited under EU standards. 90.7 % of the abattoirs that already fulfil international export standards are located around Zagreb.

Croatia is carrying out an evaluation of pig carcases on the slaughter lines as the basis for the calculation of the value of animals brought to abattoirs. This should encourage the rearing of the best possible breeds for meat production which is in the interests of the processing industry.

Over the last few years the consolidation of the meat producers and processors has started in Croatia. There are several leading industries. [2]

3 Policy and standards

The majority of existing farms cannot achieve the standards set by the EU. There is a need to change production conditions, either by the reconstruction of existing production units or building new ones.

In terms of beef and veal, Croatia has specific schemes for cattle fattening, cattle rearing and dairy cows. Trade measures are also applied. In order to be fully compliant with the *acquis* in this area, Croatia should start preparations for an animal identification system, a beef carcass classification and a proper price reporting system. Production subsidies above a minimum threshold are also granted to raise sheep and goats. The subsidy is higher for less favoured areas. Unlike the EU system, male animals are also eligible for payment. No intervention and private storage measures are applied. The payment is made per breeding ewe and per ram.

The Croatian government is drafting its pig production development programme which should change the existing production systems. According to the programme the number of breeding animals will not increase significantly, but with the improved production conditions it will be possible to increase the number of fatteners per sow.

In the pig meat sector, per head subsidies are granted for fattening and raising pigs above a minimum threshold, which is not in line with the EU legislation. Customs duties and preferential quotas are applied. The EUROP carcass classification method seems to be in place, but not yet linked to a functional price reporting system.

[2] See additional information about leading industry in Annex

For poultry, Croatia grants production subsidies above a minimum threshold, in addition to applying customs duties and preferential quotas. Marketing standards and price reporting in line with EU provisions are not yet applied and should be developed in view of accession. The Croatian Livestock Centre is responsible for a number of functions in the animal products sector. Despite the prevalence of big production units in poultry meat and egg production, this sector needs significant improvement, especially in the areas of animal storage such as creating better environmental conditions in buildings and fulfilling all animal welfare conditions.

Croatia has functioning veterinary and phytosanitary services under the responsibility of the Ministry of Agriculture. In the veterinary field, the main legislative provisions are the Veterinary Medicine Act, the Act on Veterinary Medication and Veterinary-Medical Products and the Animal Welfare Act. Several Government Ordinances regulate specific issues in this area. Croatia already applies several principles of EU legislation. A number of basic directives have been partially transposed, but remain to be brought fully into compliance with the *acquis*.

A system for identification and registration of animals is currently being set up and should be brought into compliance with EU norms. Basic animal disease and animal health control systems exist but need to be further aligned to the EU legislative and institutional requirements. The basic principles of EU legislation on animal welfare are present in national legislation. Croatia will have to focus effort in the field of *common measures*, since important elements of the *acquis* have not yet been incorporated into Croatia's regulations. Residue monitoring capacities will need to be upgraded.

With regard to public health in agri-food establishments, only a few sites satisfy EU structural and hygiene requirements and are currently registered for exporting to the EU. A large number of establishments will need significant investment to upgrade their facilities and should be supported in this task. Recently there have been a number of measures aimed at improving the quality of cattle products so that producers can improve their market returns.

Croatia has passed regulations on the quality of cattle carcasses and pig carcasses that are wholly compliant with EU regulations. Once production conditions have been adapted to meet the necessary quality regulations for livestock products, they will also be compliant with the high EU standards. Increased activity in improving the quality of livestock products should motivate farmers to learn how to improve food quality and safety, since quality can add a premium to a product's price. Professional production units take care over not only food quality and safety but also education which is necessary for efficient production. HACCP is not yet obligatory but it has been introduced in most of the big processing companies.

4 Market trends and outlook for meat consumption

Croatian consumers eat mostly pig meat and poultry meat. Pig production plays a significant role in the meat supply of the population. According to recent statistics, the annual consumption of pig meat per capita is 18.1 kg and estimates suggest that consumption is likely to increase to 35 kg per capita / year. The existing production capacity will not be able to cope with increased demand: Croatia is already importing pigs and pig meat to cover market requirements

In 2006 19.6 kg of poultry meat was consumed per capita. The outbreak of avian flu did not have any significant influence on poultry consumption which actually increased by 0.6% on the previous year, possibly due to the lower price of poultry compared to other meat types.

The consumption of beef is rather smaller, especially the consumption of veal. According to the statistical data for 2006 the average consumption was 9.4 kg of beef and only 2.2 kg of veal in 2006. In contrast, the per capita consumption of dried, smoked and salted meat is much higher and amounted to 15.3 kg per year.

Mutton, goat and lamb meat account for only 1.6% of total meat consumption. The 1.1 kg consumed per person is much lower than other Mediterranean countries, partially due to the high prices of goat and lamb meat. Of the two, the most popular is lamb meat (from lambs weighing between 12-25 kg) which is often consumed in restaurants.

Game meat is consumed far less than the meat of domestic animals. Yearly game meat consumption amounts to only 0.55 kg per person. Consumers prefer meat of domestic animals, largely because it is cheaper, and tend to disregard the nutritional advantages of game meat.

According to a survey conducted in Eastern Croatia consumers prefer tasty meat with positive effects on health, however this preference does not seem to be strong as other studies confirm that Croatian consumers are rather price sensitive. One study showed that as many as 30% of consumers choose poultry meat because of its lower price compared to other products. Other research results showed that Croatian consumers prefer domestic (Croatian) products.

5 Recent developments and outlook for trade

Croatia has a trade deficit in live animals and meat products. A surplus exists for only horses, asses, mules and hinnies but their share of the total trade is of minor importance. Measured in tonnes the deficit increased between 2001 and 2005 for all product groups except poultry and sheep and goats.

Over the last five years the negative trade balance in volume terms for live cattle has been between 23,000 and 30,000 tonnes. The situation with pigs was better as the deficit fluctuated between 3,000 and 10,000 tonnes around an increasing trend. A very unfavourable situation exists for pig meat and its products, where the deficit doubled between 2000 and 2005 when it amounted to 38,000 tonnes. Canned meat is one of the most important export meat products with a positive trade balance over the last few years. (See tables in the Annex)

The total import value of live animals in 2005 was 92, 542.11 mil. EUR., against exports to the value of 1, 609. 428 mil. EUR. The volumes and value of imports and exports of meat and edible offal were much higher: imports were 123, 121. 242 mil. EUR and exports 10,461. 282 mil EUR.

The most important export in 2005 was meat and edible offal: 3493 tonnes, 5,793.940 mil. EUR from poultry, 555 tonnes, 2, 212, 963 mil. EUR from cattle and 150 tonnes; 392,700 EUR from pigs. The main export destinations for meat and edible offal were Bosnia Herzegovina (6,896.398 mil. EUR) and Italy (2.840,640 mil. EUR).

In terms of live animals the most important export was cattle: 885 tonnes, 844,949 EUR. The main export destination was again Bosnia Herzegovina.

The most important imported live animals in 2005 were cattle (30,318 t; 64, 940.419 mil. EUR). Croatia imported live cattle weighing between 160 and 300 kg to the value of 33, 073.745 mil USD. 84% of this came from Romania. The import of live pigs amounted to 7,081.483 mil EUR, while the import of other animals was less significant.

However, the import of pig meat and its products accounted for 60% of all imports of meat and edible offal (38.116 t; 74,596.987 mil. EUR). The main import countries of origin were Denmark (15, 611.451 mil. EUR), Germany (13, 438,723 mil. EUR) and Spain (13, 277.81 mil. EUR).

6 Expert views on the successes and challenges of the sector

The Food Act (Official Gazette No. 117/03; 130/03) - a basic food safety law in Croatia - is in accordance with EU Regulation 178/2002. It provides a general framework and requirements for food and feed safety and the duties of people dealing with food, and prescribes a system of official control covering laboratory requirements, obligations of food producers to implement HACCP, the establishment of the Croatian Food Agency, managing of crises and urgent situations, and the powers and responsibilities of the relevant authorities regarding food imports.

Croatia has also harmonised the majority of EU legislation regarding animal health and welfare. The new Animal Protection Act was passed in 2006 and became effective on January 1, 2007. The Regulation on animal protection during transportation was also passed in 2007. However, actual practice is still not completely in accordance with the new regulations!

Regulations on the conditions required for the protection of animals on farms (Official Gazette 136/05) define the obligations of the authorized veterinarian on farms. The general conditions for building and equipping accommodation and the protection of farm animals are based on modern zoo hygiene and technology. The general conditions for the protection of calves and all pig categories, and the minimum conditions for protecting laying hens are elaborated in detail. Changes in these regulations will be implemented only gradually so that they will be fully applied by 2013. The reason for a gradual approach lies in the fact that it requires a process of reconstruction on farms with frequent adaptations of the existing technology used in production processes. As these measures require significant financial investment, the state and other sources need to help in order for the changes to succeed.

One of the main problems in livestock production in Croatia is the large number of small production units which cannot ensure competitive production and often do not comply with ecological and animal welfare requirements. Therefore, the Ministry of Agriculture, Forestry and Water Management has introduced development programmes for cattle and pig production. The goals are to increase production and promote competitiveness in the domestic livestock sector, and establish new and modern farms, capable of fully meeting the conditions necessary to achieve consistent product quality, environmental standards and animal welfare. This is especially important as pig production is set to increase significantly.

The market for meat and meat products is also going through significant changes. The consolidation of the industry started in recent years, and it is expected that some small processors will have to cease production or co-operate with others in joint ventures. One of the possibilities for smaller producers is to focus on the production of traditional meat specialities.

Positive signs are evident among abattoirs. The State Veterinary Inspectorate inspects all abattoirs, categorising them into three groups: those that are working in accordance with EU legislation, those not fulfilling such requirements but able to fulfil them in the near future and abattoirs not able to adapt to the new regulations. Abattoirs in the latter group are closed down. This will help in regulating the meat market in Croatia.

Croatian producers of meat and meat products have started to apply a more market-oriented approach in their businesses. The development of producers' brands has already made a positive impact on business results. Furthermore, some meat producers have asked for the protection of geographical designation. in order to add value to their products. These initiatives not only help to maintain and increase the domestic market share but also suggest a good outlook for the export of such products.

7 Conclusion

Croatia has favourable conditions for livestock production, particularly in the hilly or mountainous areas which have considerable raw material resources for the development of livestock production. However, this production does not satisfy domestic needs and Croatia is a net importer of meat and meat products. Only poultry production is self-sufficient.

The main problem faced is one of small production units that often fail to meet environmental and animal welfare requirements. Productivity in livestock production remains at a low level due to inadequate diets and feeding systems, an inefficient breeding structure and difficulties in improving farm buildings. The Government has therefore approved development programmes for cattle and pig production in order to increase production, and to change production systems by establishing new and modern farms, capable of fully meeting the conditions necessary for the achievement of a standardized product quality, environmental standards and animal welfare. As a result the production of livestock and meat shows increasing trend in recent years.

The absence of market facilities such as auctions and commodity exchanges heavily influences the development of the livestock market.

Another weakness is the poor structure of slaughtering facilities in the country. The majority of abattoirs operate with outdated technology and at a low level of capacity utilisation with only a few entrepreneurs willing to target the abattoir sector for their investment. However, the recent activities of the State Veterinary Inspectorate will help to improve this stage of the food chain.

The meat processing industry has started the necessary process of consolidation in recent years. New technologies have been introduced to meet all EU hygiene and quality standards. This should help to increase the competitiveness of the domestic processing industry and to ensure its place in the international market.

Croatia has many traditional meat products which have good export potential. This is especially true for those products that will obtain protected designation of origin or protected geographical indication. Croatia is traditional net importer country.

Annex: Additional information [1]

Horse production

Out of all domesticated animals, horses have had the worst downward trend in numbers, from 190,000 in 1970 to only 9,000 in 2003 when the trend was halted. Indigenous breeds such as Medimurski konj, Licipanac, Hrvatski posavac and Hrvatski hladnokrvnjak are used mostly for meat production via an extensive production system. Other horses are primarily bred for sport and horse-riding.

Rabbit production

Bred rabbits and wild rabbits as well as the industrial production of their meat have shown significant fluctuations in the last few years. Meat production in 2001 increased four-fold compared to the previous year but production was almost stopped over the next two years. In 2004 around 350 tonnes of rabbit meat was produced.

Additional information [2]

Agrokor Group is the largest private company in Croatia and one of the leading regional companies, with its meat industries (*Bjelovarska industrija mesa (BIM), Belje, PIK Vrbovec*) making it one of the leading producers and processors of meat and its products. *Agrokor Group* became the majority owner of PIK Vrbovec and Belje in 2005. The yearly supply of *BIM* amounts to 850 tonnes of fresh meat (60% Pigmeat), and 220 tonnes of meat products. *Belje* produces some 32,000 pigs, 2,200 cattle and 807,000 chicken. The daily production of meat products amounts to 80 tonnes. *PIK Vrbovec* produces around 35,000 tonnes of meat and associated products.

"*Braca Pivac*" became one of the biggest meat producers in Croatia following its aquisition in 2006, with a combined market share close to 20%.

Gavrilovic is a family-owned business among the leading Croatian companies that has invested in the most modern production technology over the past eight years. Their products are widely recognised and known not only in the Croatian market but also outside the country. Daily production amounts to 50 tonnes and increases in season to 80 tonnes of dried meat products.

Mesnice Fiolic produces around 2,700 tonnes of fresh pig meat, 1,900 tonnes of fresh veal, 350 tonnes of beef, 70 tonnes of lamb and 3,000 tonnes of meat products. During 2005 the company obtained an export licence for the EU.

Danica produces some 64,000 tonnes of meat products, of which 66% are different sausage products and 18% are canned meat.

Meat industry Ivanec is the leading Croatian producer of beef, one of three meat businesses with export potential to the EU. Annual production amounts to some 2,000 of beef, 30,000 pcs of pigs MIX OF THE MEAT (beef) AND THE ANIMAL (pig)? … WHICH SHOULD BE USED? and 2,500 tonnes of meat products (around 50 different products).

Perutnina Ptuj - Pipo accounts for 15-20% of Croatian poultry meat and products.

Puris is the biggest producer of turkey meat and its products in Croatia.

Table 1: Croatian Agricultural Livestock Production 2000 -2006

	Measure unit	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**
Cattle	000 animals	427	438	417	444	466	471	485
Pigs	000 animals	1,233	1,234	1,286	1,347	1489	1205	1230
Horses	000 animals	11	10	8	9	10	9	9
Sheep	000 animals	528	539	580	587	721	796	768
Goats	000 animals	79	93	97	86	126		
Poultry	000 animals	11,256	11,747	11,665	11,778	11,185	10,640	10,045
Beehives	000 pcs	98	98	107	111	119	167	162
Milk	million lit.	588	634	674	642	663	766	
Eggs	million.	774	787	761	873	801	824	
Honey	tonnes	1,580	2,068	2,060	1,616	2,543	2,657	
Cattle breeding	tonnes	62,908	56,387	68,402	72,874	72,901	78	
Pig breeding	tonnes	164,462	180,052	189,090	208,051	183	183	
Sheep breeding	tonnes	11,102	9,699	10,654	13,124	13	14	
Poultry breeding	tonnes	104,762	93,105	92,610	89,476	90	88	115

Source: Central Bureau of Statistics, 2006

Cattle

Table 2: Trends in the number of cattle and ownership structure

Year	Cattle		Cows and pregnant heifers		Calves bullocks and heifers under 1 year old		Calves bullocks and heifers over 1 year old	
	Total No	Family holdings %	Total No	Family holdings %	Total No	Family holdings %	Total No	Family holdings %
2000	426,57	88.3	286,704	96.75	93	72,04	45	66,66
2001	438,423	87.0	280,453	96.03	104	69,23	52	73,07
2002	417,113	89.7	277,668	96.40	90	76,66	47	76,59
2003	444,32	80.42	280,141	94.01	102	66,66	61	68,85
2004	465,935	85,22	271,411	95,72	135	70,37	56	69,64
2005	471	85,56	272	95,95	143	68,53	54	77,77
2006	485	83,09	273	95,6	147	68,02	63	63,49

Source: Central Bureau of Statistic, 2006

Table 3: Cattle breeding 2000 – 2005

	year					
	2000	**2001**	**2002**	**2003**	**2004**	**2005**
Cattle breeding (tonnes)	62.908	56.387	68.402	72.874	72.901	78

Source: Central Bureau of Statistic, 2006

Pigs

Table 4: Number of pigs, breeding sows and gilts 2000 – 2006

Year	Pigs		Sows and in -pig gilts	
	Total No	Family holdings %	Total No	Family holdings %
2000	1,233,000	77.29	180	84.88
2001	1,234,000	76.01	182	82.41
2002	1,286,000	76.12	185	83.78
2003	1,347,000	73.64	196	83.67
2004	1,489,000	75.82	222	84.68
2005	1,205,000	72.94	193	83.93
2006	1,230,000	70.81	197	82.23

Source: Central Bureau of Statistic, 2006

Table 5: Trend in the numbe r of fatteners per sow and total number of fattening pigs

Year	Companies			Family holdings		Total number of fattening animals	
	Number of piglets per sow	Number of fatteners per sow	Total number of fatteners	Fatteners per sow	Total number of fatteners	Total number per sow	Total
1995	17.47	15,72	426,310	12.41	1,449,488	13.03	1,875,798
2000	17.21	15,49	357,215	12.67	1,524,496	13.08	1,881,711
2004	18.00	16,20	451,656	12.40	1,864,960	12.99	2,316,616

Source: Central Bureau of Statistic, 2005

Poultry

Table 6: Trend in the production of poultry meat and eggs 2000 - 2006

Year	Number of animals (.000 pcs)	Family holdings %	Meat production (tonnes)		Eggs production (million pcs)
			Number of slaughtered animals	Weight (tonnes)	
2000	11,256	61.36	20,470	34,398	774
2001	11,747	58.71	23,197	38,432	787
2002	11,665	60.98	23,208	37,751	761
2003	11,778	59.48	23,375	38,944	873
2004	11,185	62.00	22,844	42,575	801
2005	10,64	61.73	37,356	63,131	824
2006	10,045	61.82			

Source: Central Bureau of Statistic, 2006

Industrial production

Table 7: The industrial production of selected products 2003 - 2005

Product	Unit	2003.	2004.	2005.	Index 2005./ 2004.
Meat of bovine animals, fresh or chilled	tonnes	17,794	19,166	19,275	100.6
Meat of pigs, fresh or chilled	tonnes	41,280	40,328	39,331	97.5
Meat of poultry, fresh or chilled	tonnes	57,542	57,925	58,815	101.5
Sausage	tonnes	46,128	46,309	49,428	106.7
Canned meat	tonnes	14,948	15,431	15,116	98.0

International trade

Table 8: Imports of Meat and Live Animals

	IMPORT/ tonnes					
PRODUCTS	***2000***	***2001***	***2002***	***2003***	***2004***	***2005***
LIVE ANIMALS	**33751**	**19897**	**37669**	**29454**	**32450**	**42589**
Horses, asses, mules, hinnies	27	35	60	34	34	38
Cattle	25366	14165	30608	23792	26338	30318
Pigs	6163	3077	3677	3276	4504	10784
Sheep and goats	2019	1981	2307	2042	1267	1025
Poultry	125	488	839	232	262	355
Other animals	51	151	178	77	43	70
MEAT AND EDIBLE OFFAL	**26378**	**27180**	**34413**	**36038**	**47090**	**63482**
Meat of bovine animals, fresh or chilled	569	48	0	5	2376	5514
Meat of bovine animals, frozen	4890	1124	1179	1589	2160	3589
Meat of pigs, fresh, chilled or frozen	15229	17868	23225	23446	29370	38116
Meat of sheep or goats, fresh, chilled or frozen	477	304	613	1.646	2.237	2.402
Meat of horses, asses, mules, hinnies	0	60	670	377	237	0
Meat and edible meat offal, fresh or chilled	1191	1001	1994	1764	1162	1497
Meat and edible offal, of the poultry of heading 0105, fresh, chilled or frozen	1549	3748	3162	2690	4825	6609
Other meat and edible meat offal	12	22	32	52	86	123
Pig & poultry fat	1777	2074	2442	2932	2844	3705
Meat & ed offal salted, dried etc. & flour & meal	686	930	1.095	1.538	1.792	1.927

Table 9: Exports of Meat and Live Animals

	EXPORT/ tonnes					
PRODUCTS	***2000***	***2001***	***2002***	***2003***	***2004***	***2005***
LIVE ANIMALS	**909**	**1.217**	**585**	**867**	**818**	1386
Horses, asses, mules, hinnies	772	701	420	428	316	326
Cattle	1	486	0	0	158	885
Pigs	3	0	2	0	63	46
Sheep and goats	1	0	0	14	5	0
Poultry	126	19	143	64	234	117
Other animals	7	11	20	362	42	12
MEAT AND EDIBLE OFFAL	**2677**	**3655**	**3076**	**3636**	**5183**	**4860**
Meat of bovine animals, fresh or chilled	703	380	190	307	586	528
Meat of bovine animals, frozen	27	18	0	0	42	27
Meat of pigs, fresh, chilled or frozen	56	0	146	12	221	157
Meat of sheep or goats, fresh, chilled or frozen	0	0	0	0	0	0
Meat of horses, asses, mules, hinnies	0	0	0	0	0	6
Meat and edible meat offal, fresh or chilled	5	10	69	124	27	85
Meat and edible offal, of the poultry of heading 0105, fresh, chilled or frozen	1593	3181	2576	2861	3753	3493
Other meat and edible meat offal	2	6	0	141	340	401
Pig & poultry fat	194	10	0	5	15	37
Meat & ed offal salted, dried etc. & flour & meal	96	49	94	185	197	126

Consumption

Table 10: Consumed quantities of meat and meat preparations – annual average per household member

	Quantities consumed (kg)		
	2003	**2004**	**2005**
Beef	8.55	9.34	9.41
Veal	2.08	2.06	2.22
Pigmeat	18.14	16.44	18.09
Mutton. goat. lamb	1.27	1.03	1.12
Poultry	19.3	19.03	19.61
Game and rabbit	0.44	0.34	0.41
Horse meat	0.01	0.02	0.02
Edible offal	1.45	1.28	1.12
Dried, smoked and salted meat	13.68	15.63	15.34
Other preserved or processed meat	1.80	0.68	0.84

Map 1: Slaughtering and rendering plants in 2004