

# Economic consequences of different scenarios of animal Production in Europe

## Balance Production & Consumption

Dr. Josef Efken and Annika Johanna Thies

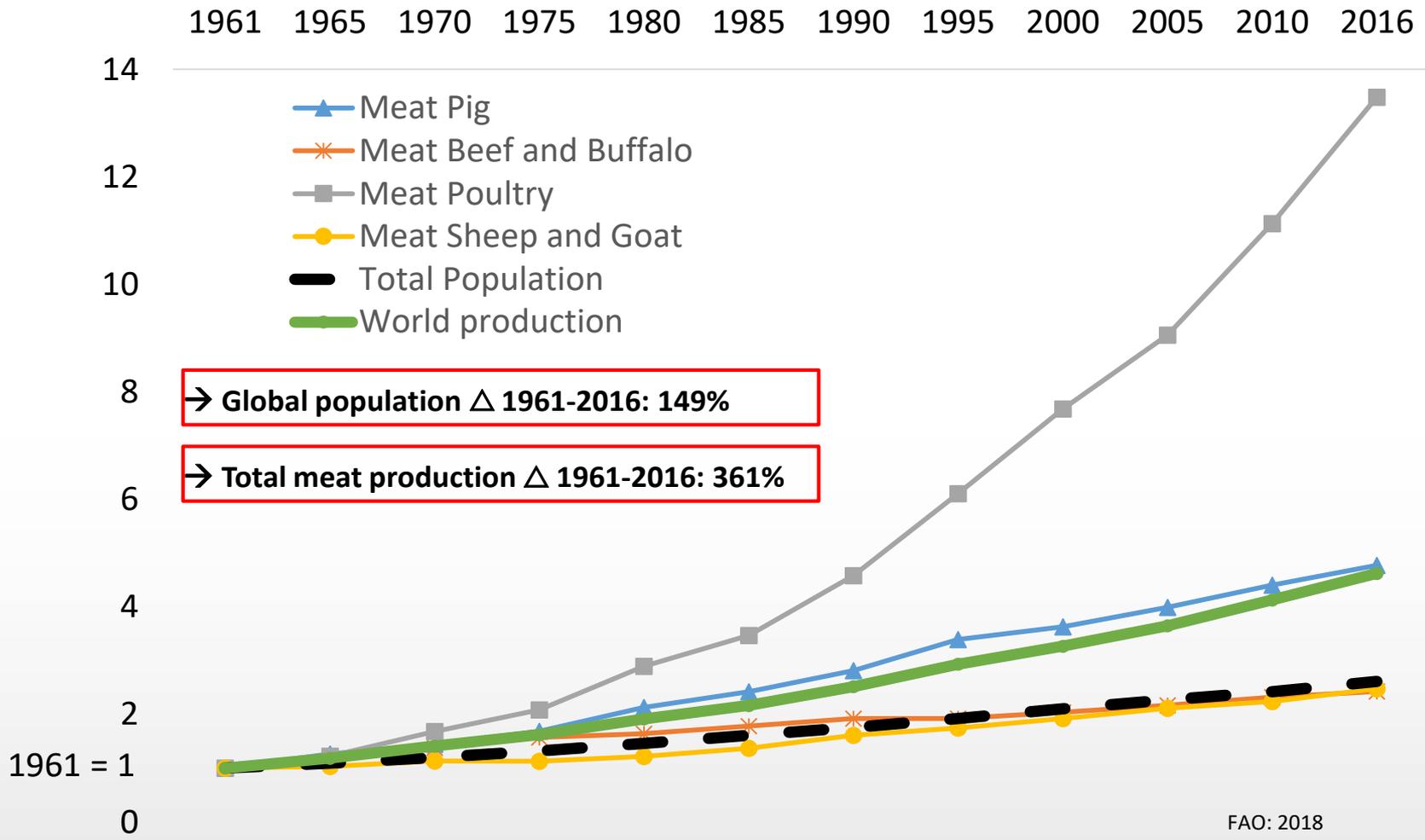
Thünen Institute of Market Analysis



Brussels

7th of November 2018

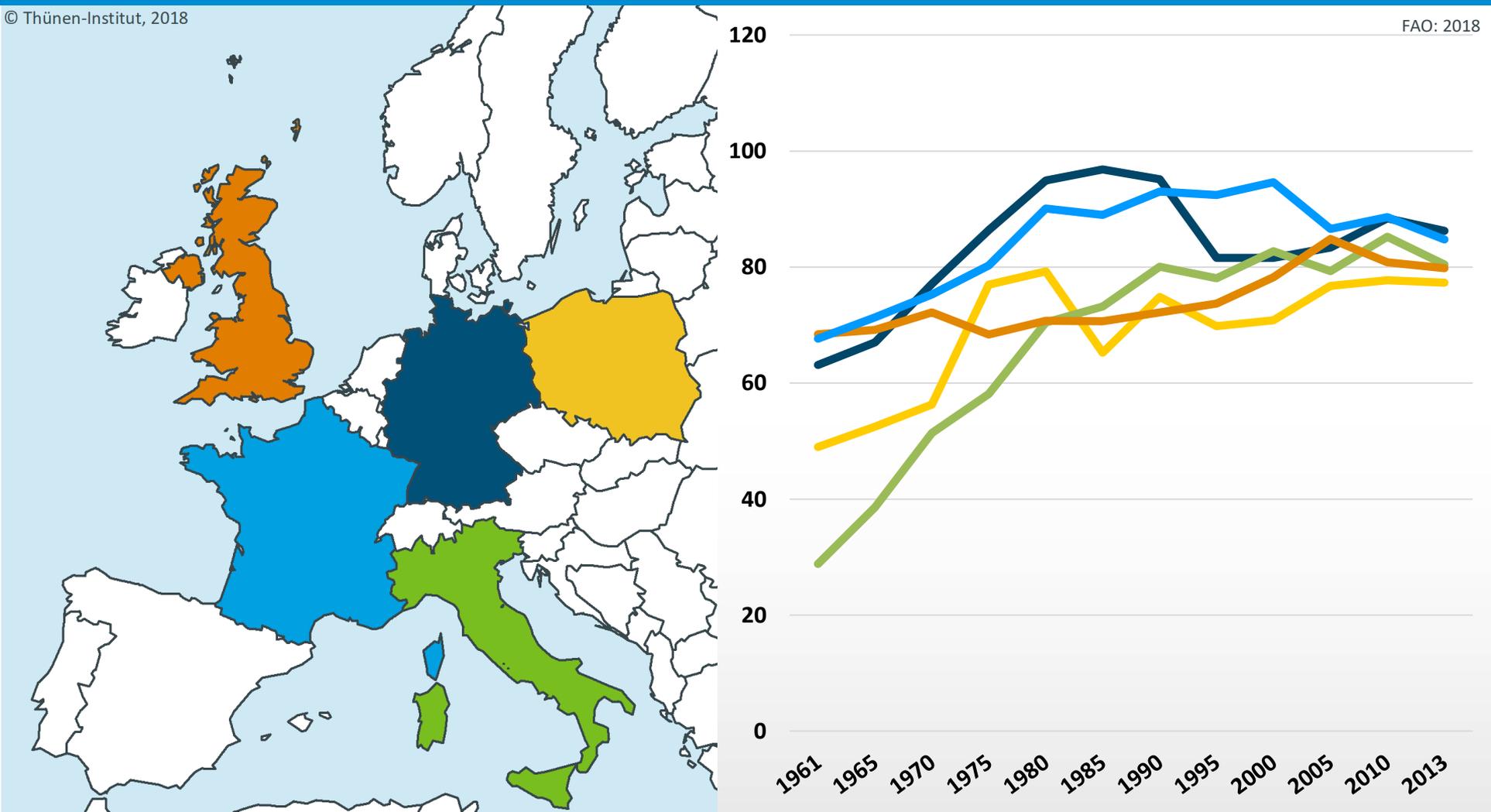
# Global meat production in a historical context



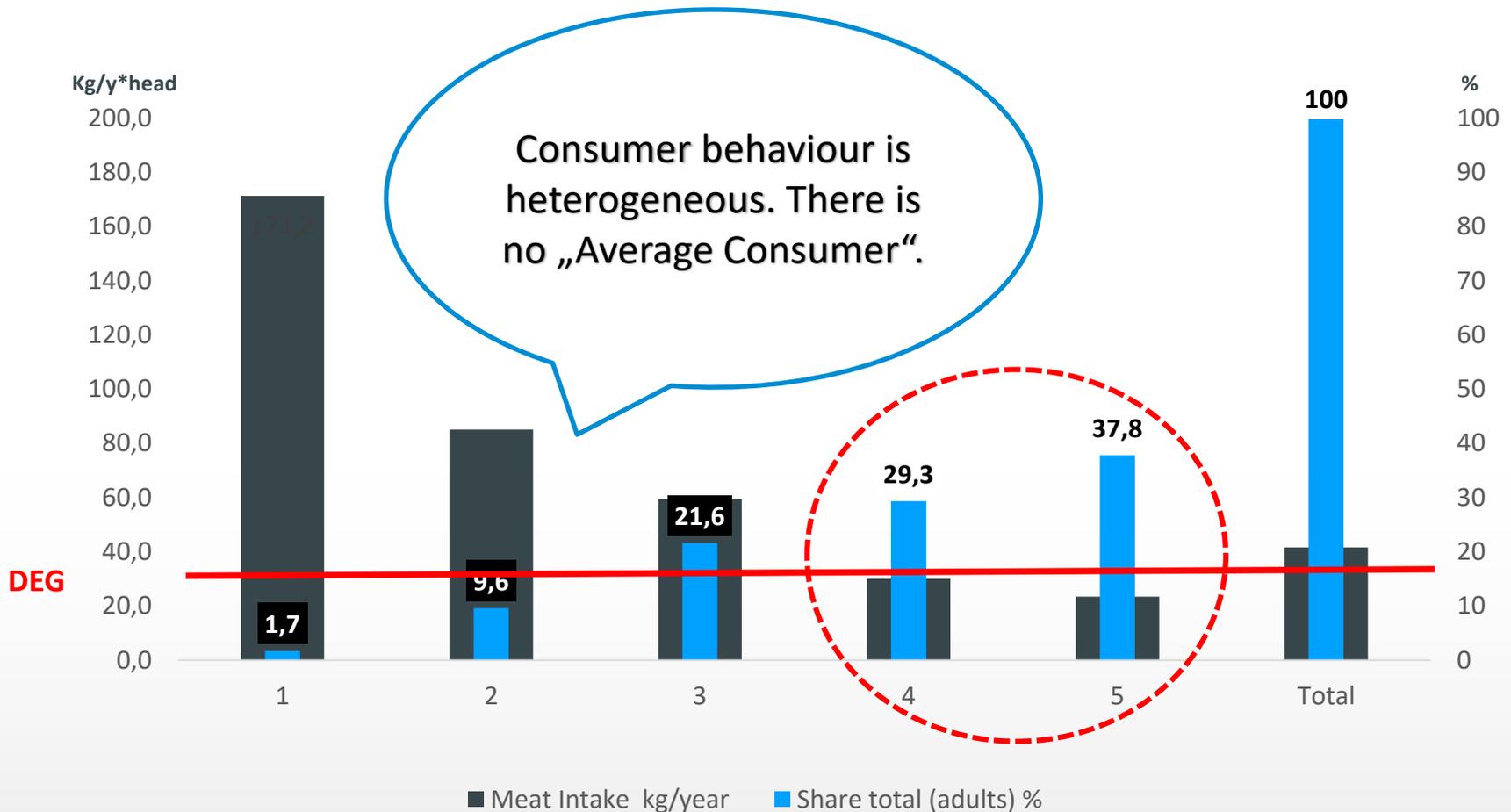
# Meat consumption in kg per capita in selected EU Member States

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FAO: 2018

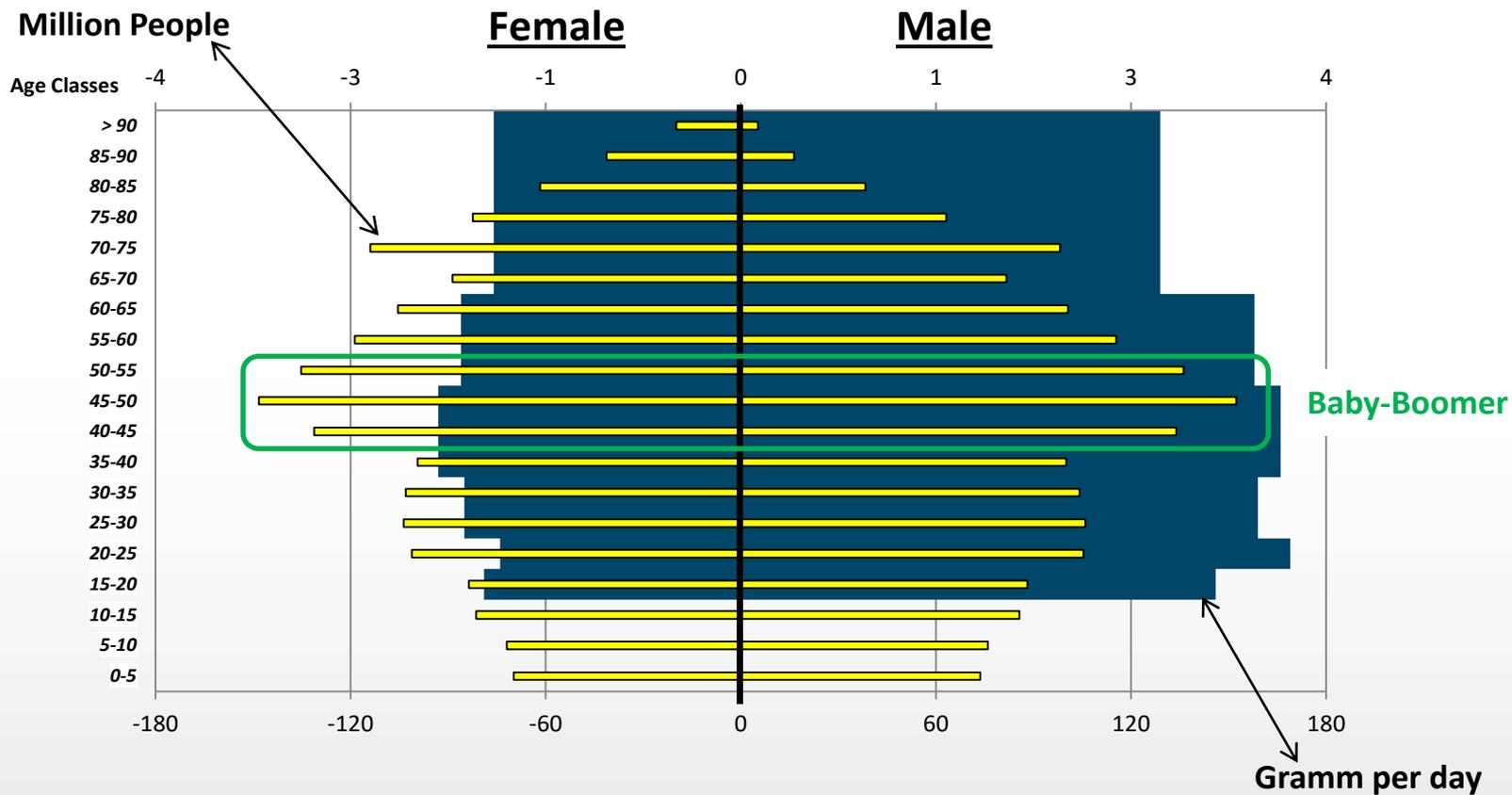


# Level of consumption in Germany



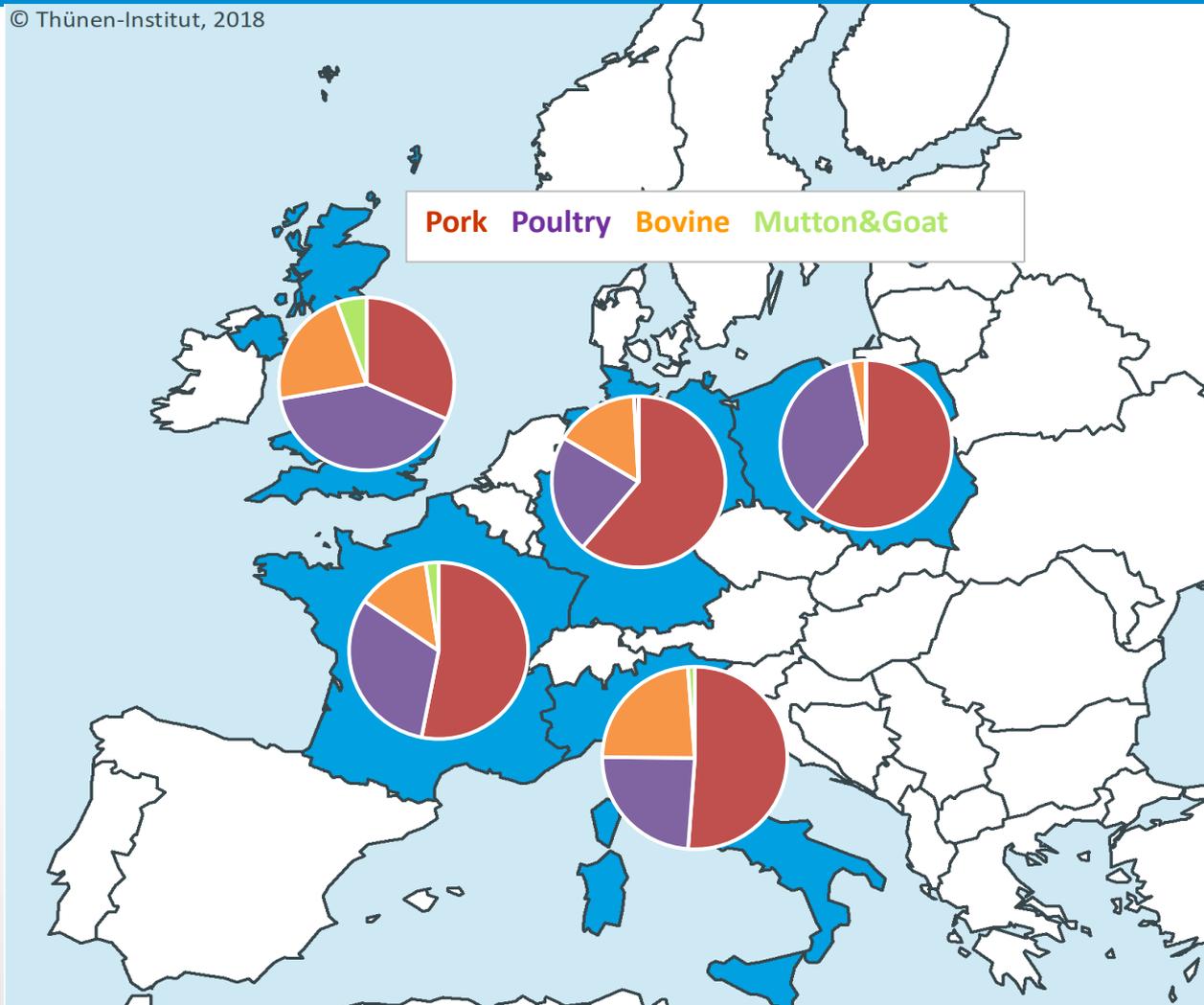
German Association for Nutrition (DEG) Recommendation: 30kg per capita

# Meat Demand, Germany 2013



# Composition of consumption in selected EU Member States

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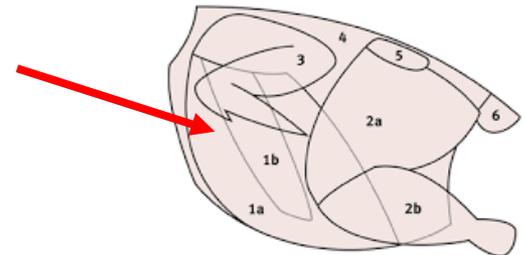


FAO: 2018

# „Less and less of the animal is eaten“

## The chicken case

- There is an increasing restriction of consumed cuts in Europe
- Mainly the precious pieces are consumed (breast filet)
- While other cuts and byproducts find another use within a country or are exported (“reciprocal value”)
- Hardly any knowledge about the flow of cuts and their utilization
  - Human intake
  - Pet-Food
  - Other use ??

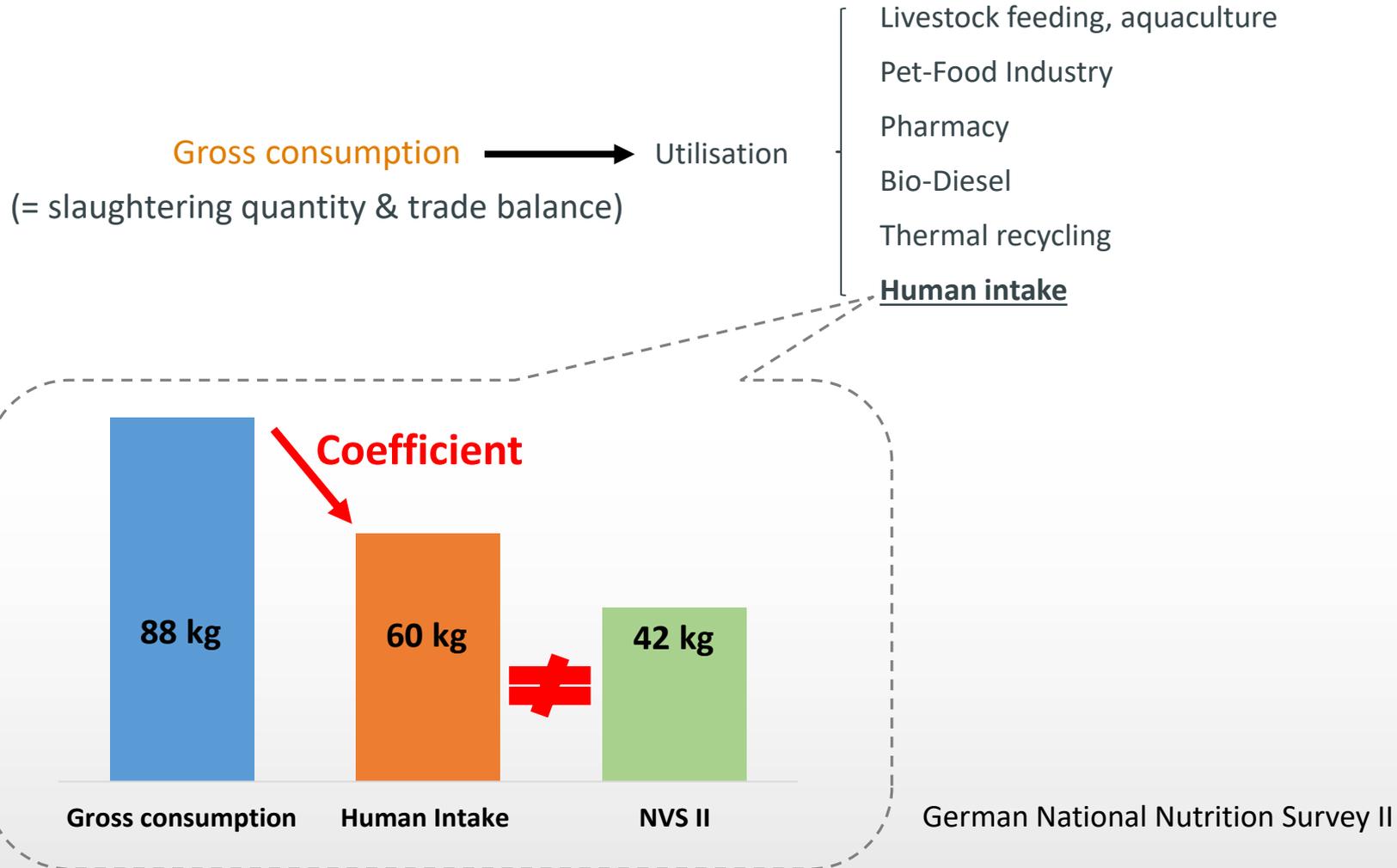


Wikipedia: 2018

„How to deal with this development?“

„What does that tell us about sustainability?“

# Consumption $\neq$ intake: Calculation coming from the supply side 2016 (Germany)



# List of different coefficients (exemplary pork)

Country / Institution	Appx. Year	Deduction				Total Deduction (Coefficient)	Method
Germany	1986	Bones 12%	Process losses 5%	Household losses 4%	Pet-Food 8,5%	29,5%	Interviews and Estimations
USDA	1970	From primary to retail weight 27%		From retail to consumer weight 3%	Loss at consumer level 20%	50%	Interviews and Estimation
OECD (0,78 to retail)	1990	—————				22%	Result of negotiation
EuroStat	1990	—————				22%	Result of negotiation

Bundesmarktverband Vieh und Fleisch; European Commission (2018)

# Data Situation

## ➤ Problem: Lack of information

- Human meat consumption
- Information about different uses of cuts and byproducts
- No official information on consumption of meat on national level for EU Member States (FAO, Eurostat)
- No consistent calculation of human meat intake

➔ “How can we evaluate a “good” balance between production and consumption?”

# Keynotes

- Problem in the course of the development of realistic scenarios: Lack of information
- At the end of the day we have to develop policies that take into account the issues of:
  - Consumer sovereignty
  - And avoid the benevolent dictator model



Pixabay: 2018

- Problem in the course of the development of targeted policies: Lack of information

**„We need better insights regarding consumers and distribution channels“**

# Thank you very much for your attention

## For any further questions:

[josef.efken@thuenen.de](mailto:josef.efken@thuenen.de)

[annika.thies@thuenen.de](mailto:annika.thies@thuenen.de)

Thünen Institute for Market Analysis

