La position du porc belge sur le marché européen

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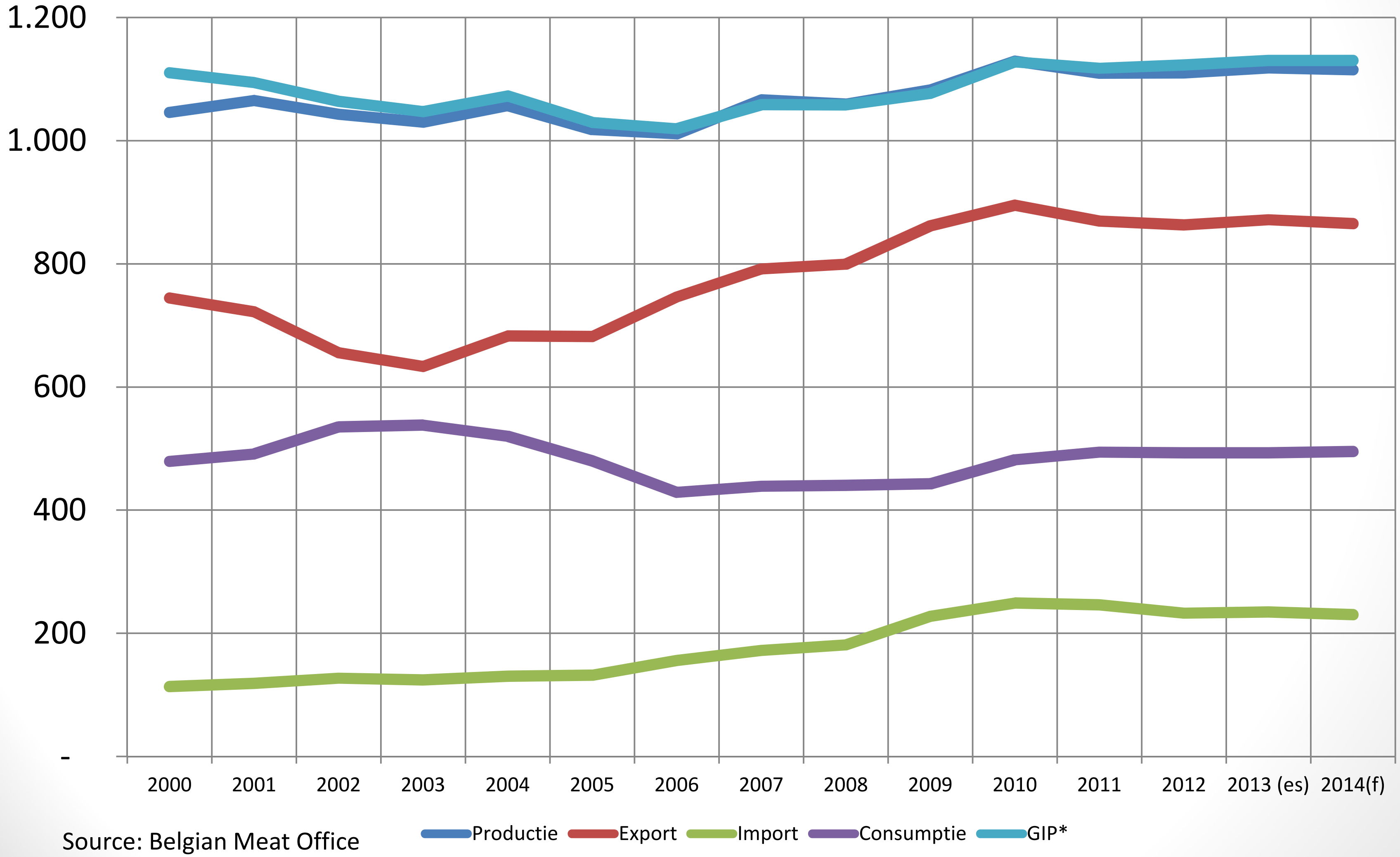
16ème Journée d'Etude des productions porcines et avicoles
Gembloux, le 30.11.2016

Le marché du porc en Belgique: chiffres clés dans une perspective globale

Joris Coenen, VLAM vzw - Belgian Meat Office

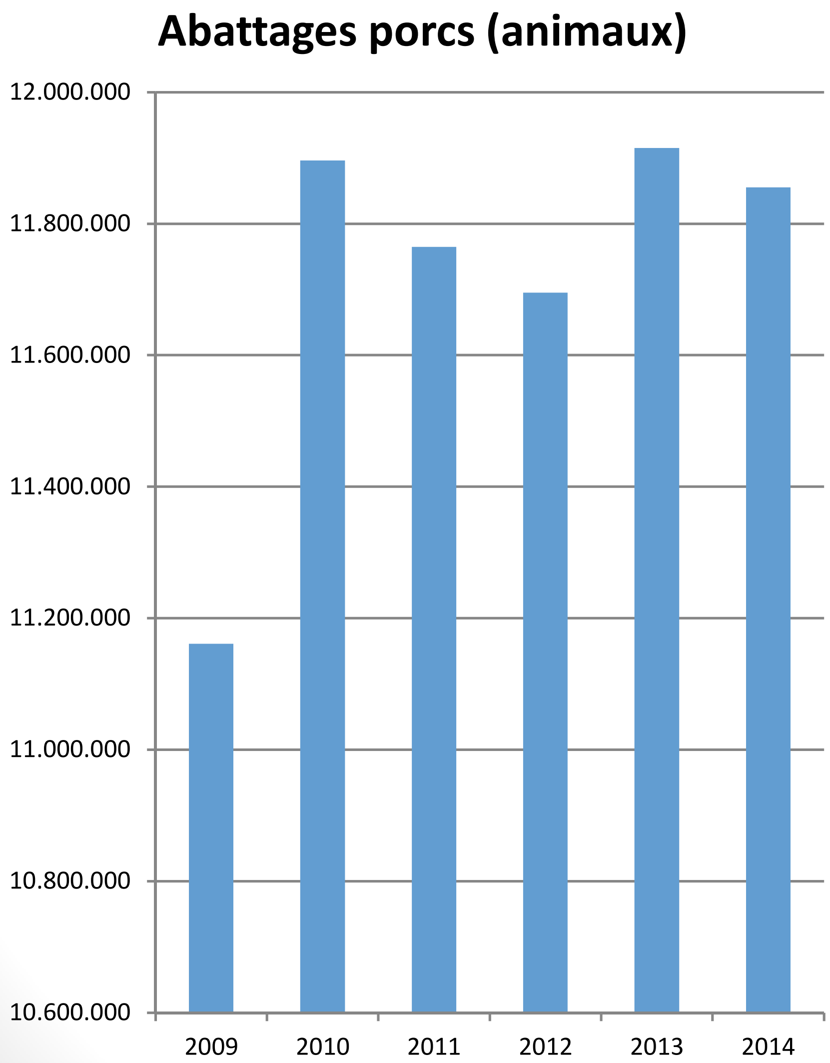
BE - bilan d'approvisionnement porc

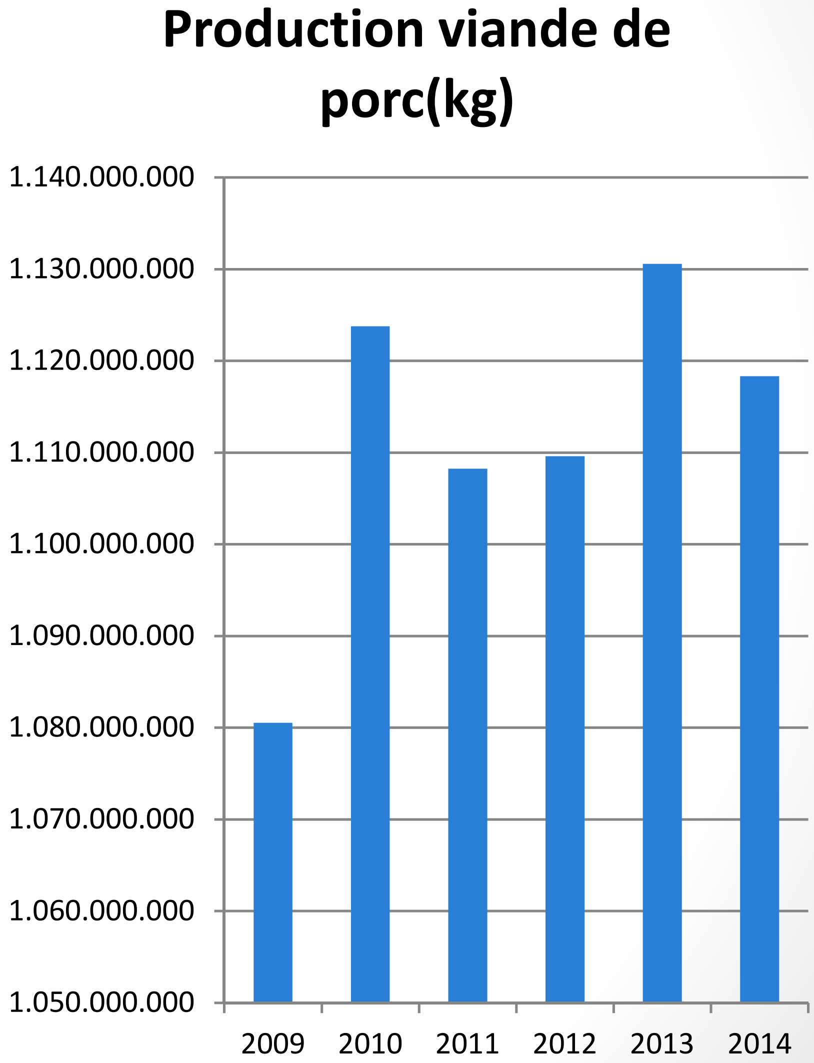
(x1000 ton cw, incl. live trade)



Source: Belgian Meat Office

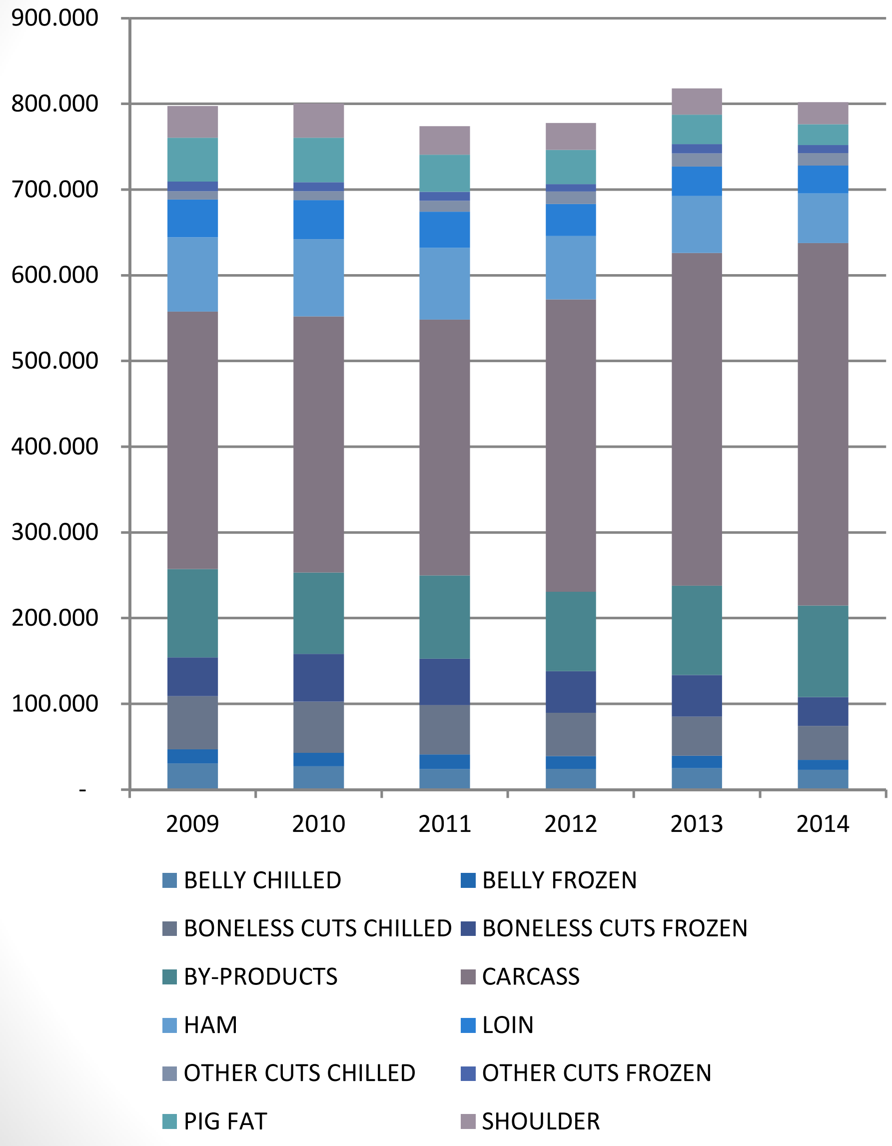
BE - production viande porcine(x1.000 T)

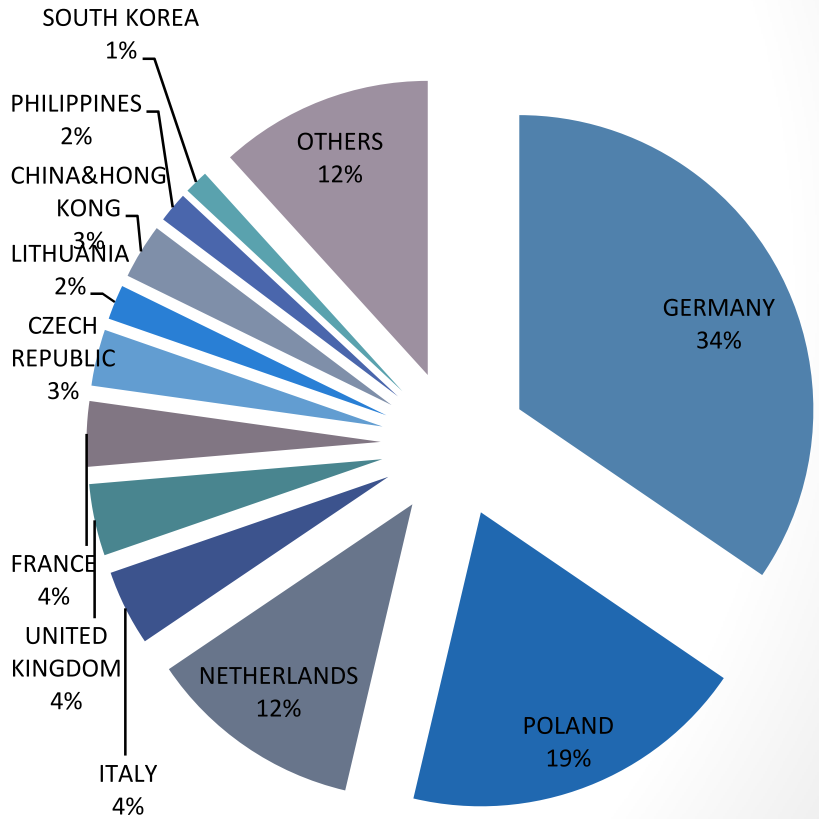




Source: FPS Economy

BE - exportation viande porcine (Metric tons pw, excl. processed, incl. fat and by-products)





By destination, volume 2014

Source: Belgian Meat Office based on Eurostat

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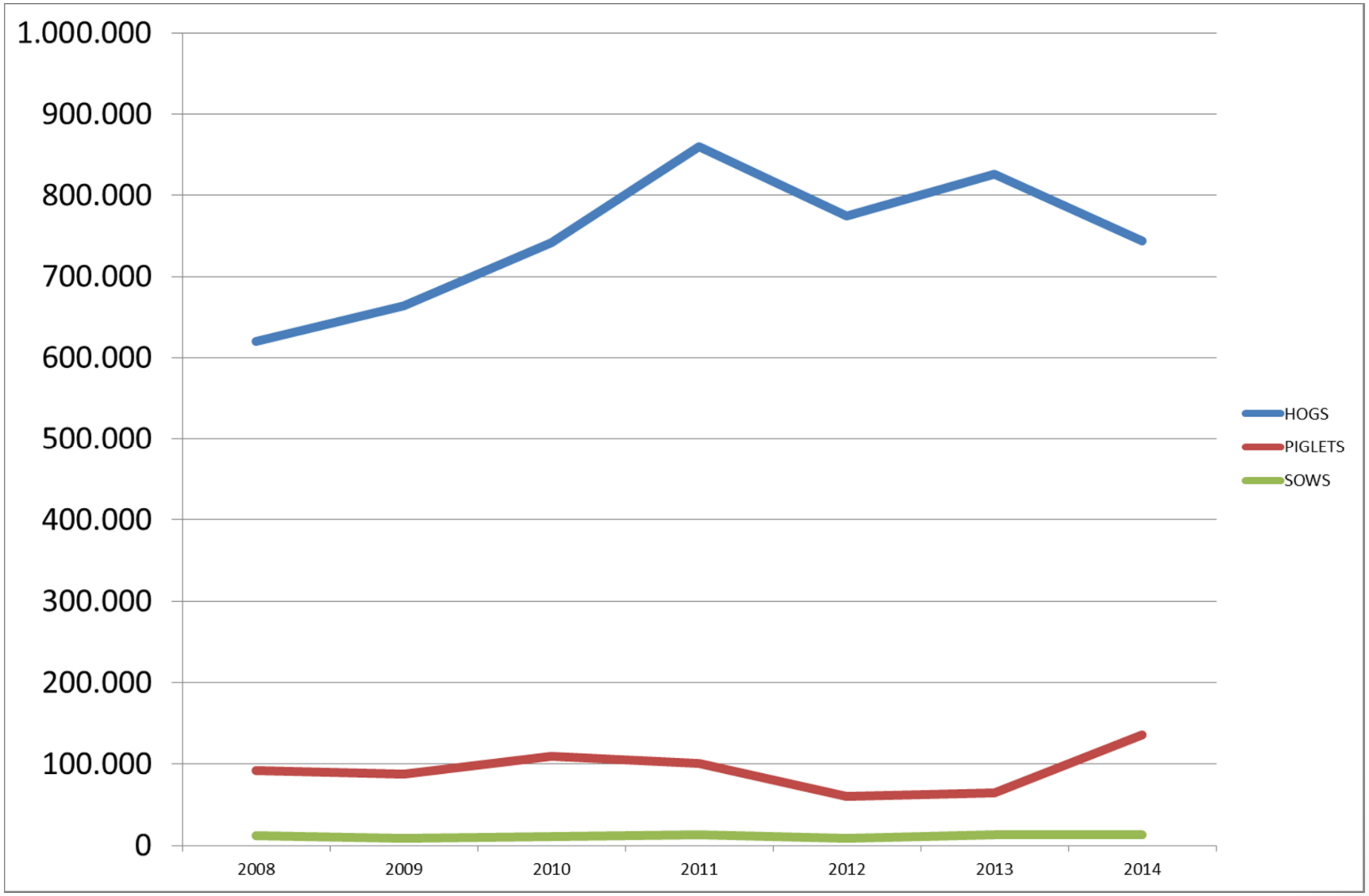
BE - commerce en vif: exportation

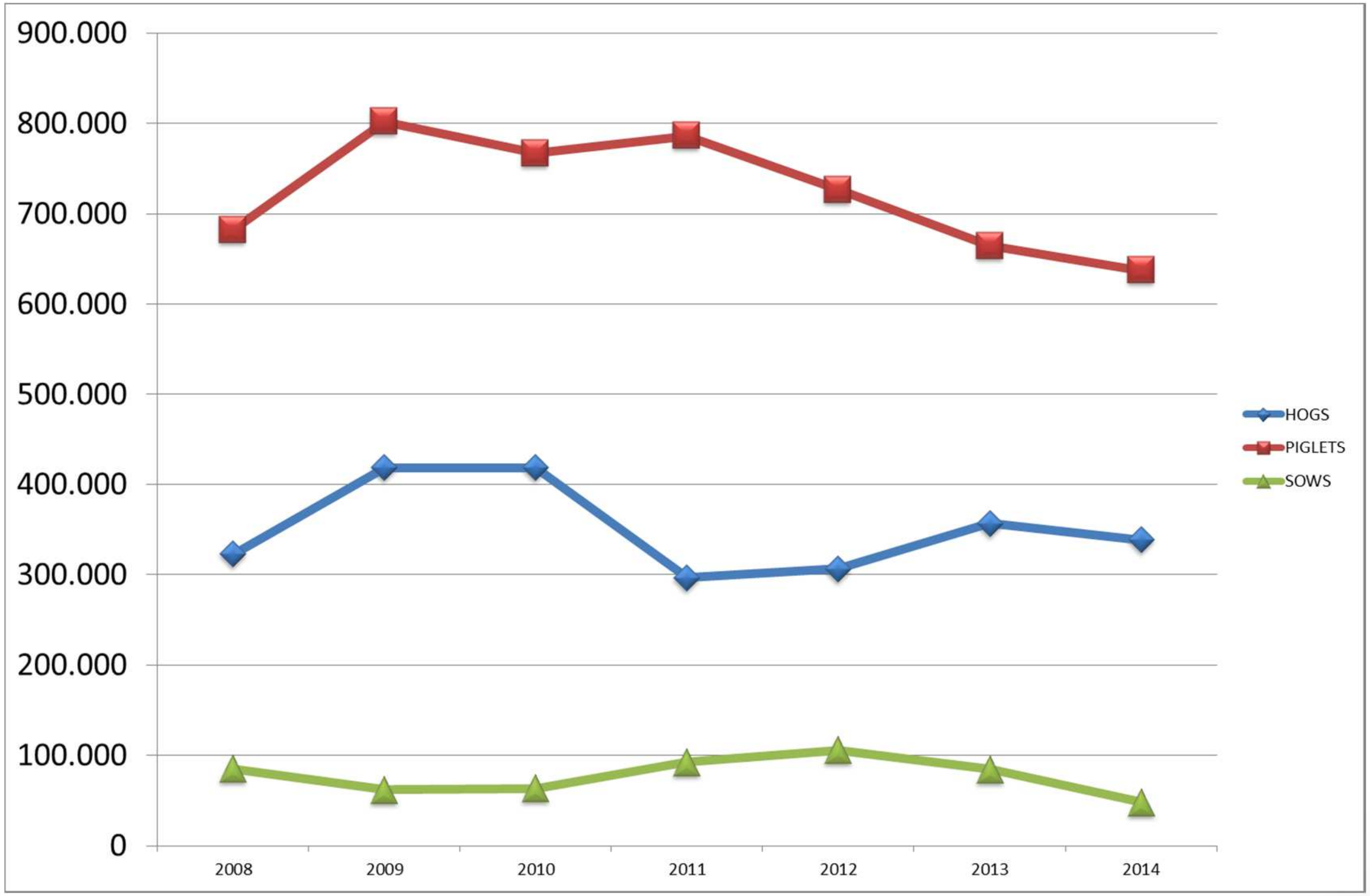
(nombre d'animaux)



Source: Belgian Meat Office based on Eurostat

BE - commerce en vif: importation

(nombre d'animaux)



Source: Belgian Meat Office based on Eurostat

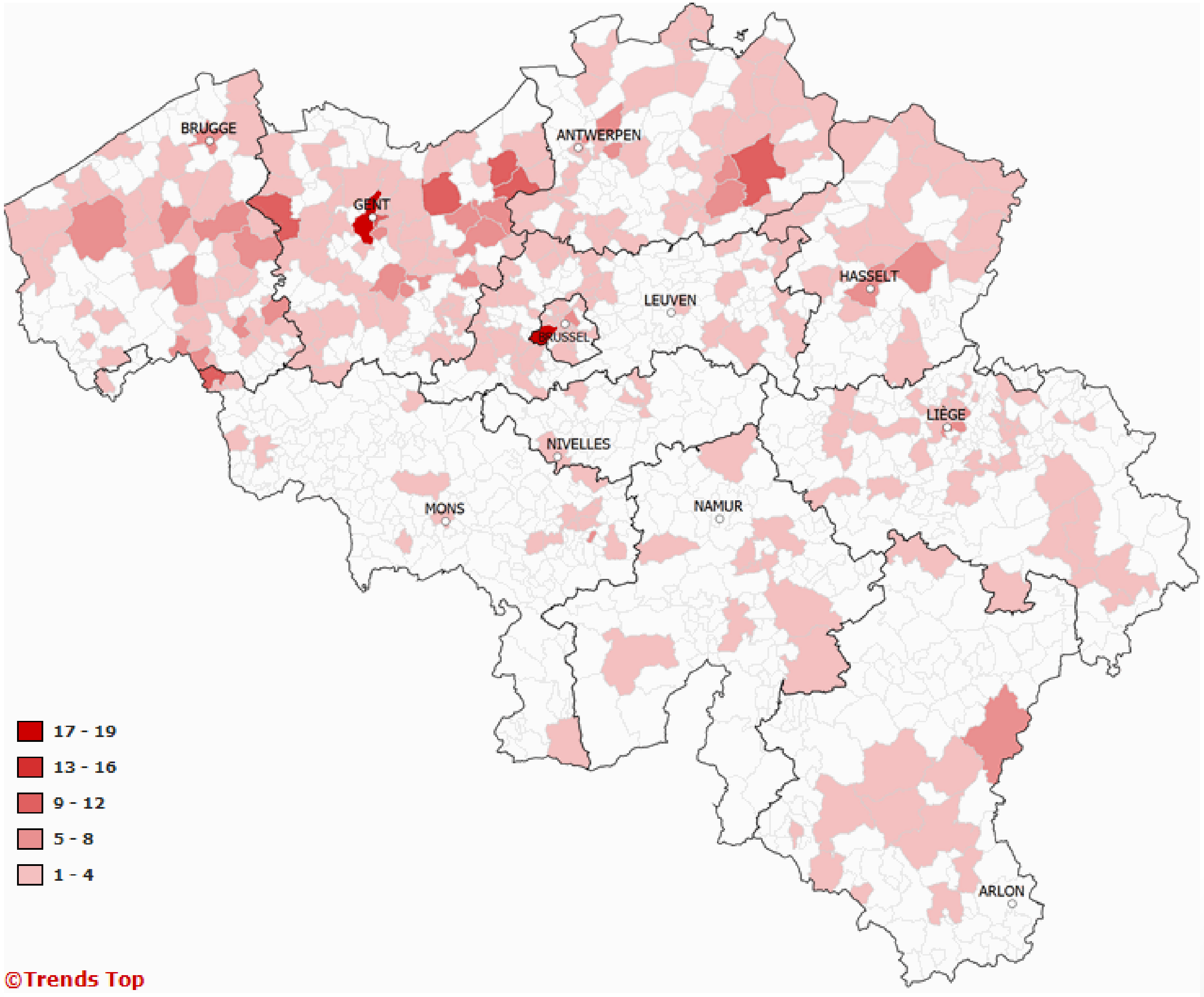
BE = n° 7 exportateur de viande porcine

Exporters	2014
Germany	2.533.480
United States of America	1.912.550
Denmark	1.355.343
Spain	1.339.753
Canada	1.057.289
Netherlands	998.396
Belgium	837.018
France	592.261
Poland	534.497
Brazil	478.803

2014 – based on volume pw, incl. edible offals

Source: BMO calculations based on UN Comtrade statistics

BE – implantation de l'industrie de la viande



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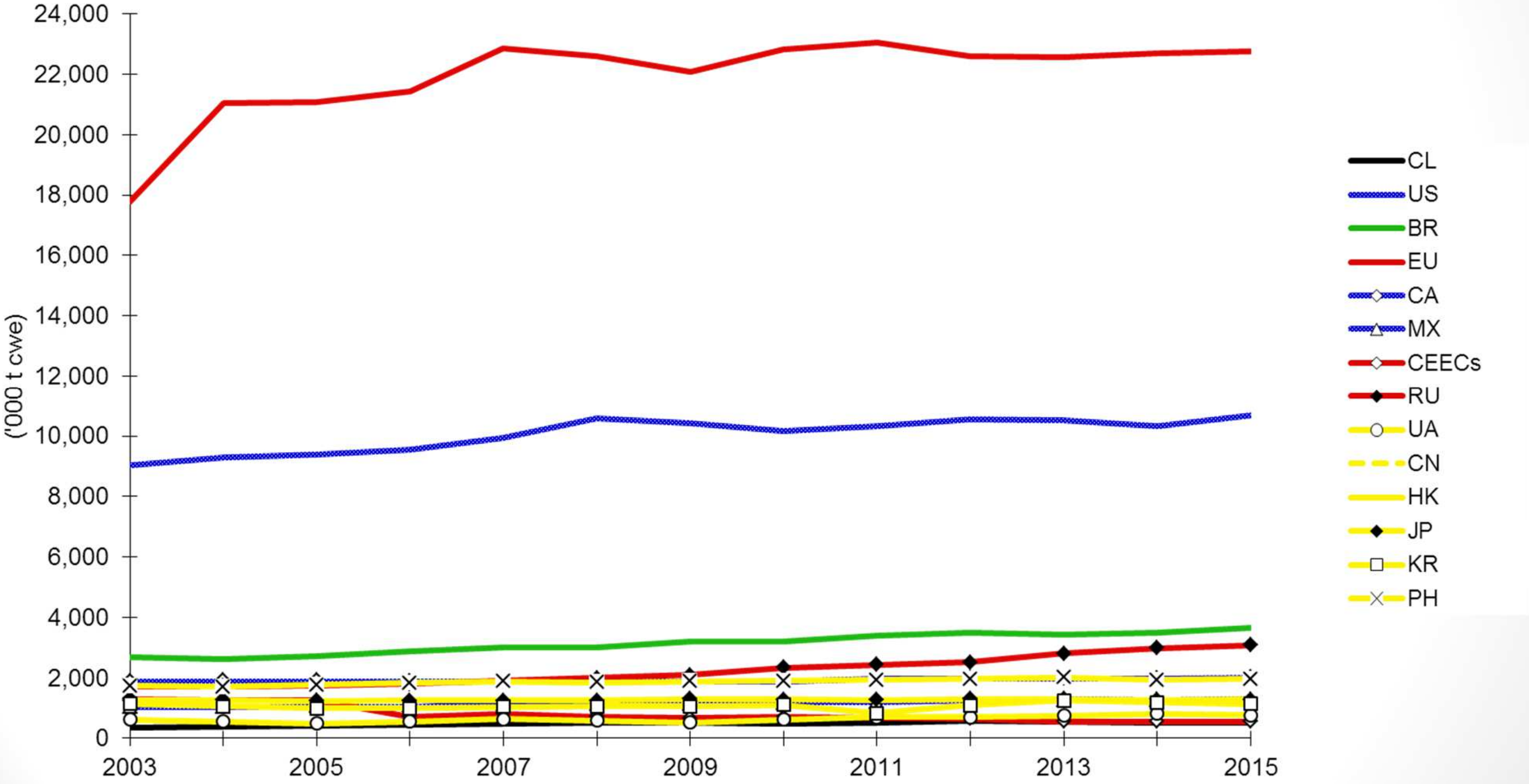
BE – l'industrie de la viande : CA et emplois

	Provincie	Bedrijven	%	Omzet / brutomarge	%	Personeel	%	Toeg.waarde	%	
1	Oost-Vlaanderen	160	27%	1.022.829.190	19%	2.410	22%	191.812.353	25%	Lijst
2	West-Vlaanderen	101	17%	1.523.111.100	28%	2.914	27%	199.276.489	26%	Lijst
3	Antwerpen	92	15%	1.466.058.396	27%	1.856	17%	135.415.522	17%	Lijst
4	Luik	49	8%	92.348.584	2%	368	3%	25.491.834	3%	Lijst
5	Brussel	47	8%	177.389.393	3%	275	3%	12.189.173	2%	Lijst
6	Vlaams-Brabant	42	7%	407.964.382	7%	1.295	12%	85.888.572	11%	Lijst
7	Limburg	41	7%	415.880.057	8%	915	8%	70.420.528	9%	Lijst
8	Henegouwen	35	6%	287.894.395	5%	550	5%	41.683.371	5%	Lijst
9	Luxemburg	18	3%	81.788.170	1%	134	1%	11.050.536	1%	Lijst
10	Namen	9	1%	11.835.899	0%	61	1%	3.002.702	0%	Lijst
11	Waals-Brabant	7	1%	2.628.255	0%	10	0%	675.944	0%	Lijst
		601		5.489.727.821		10.789		776.907.024		

Source: Trends

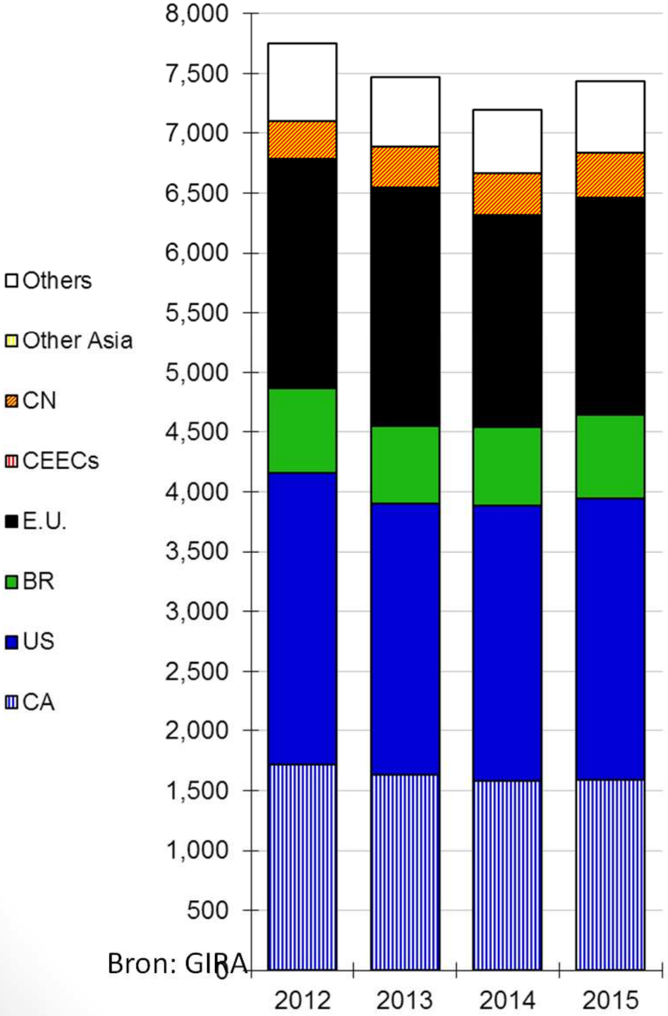
Production mondiale viande porcine

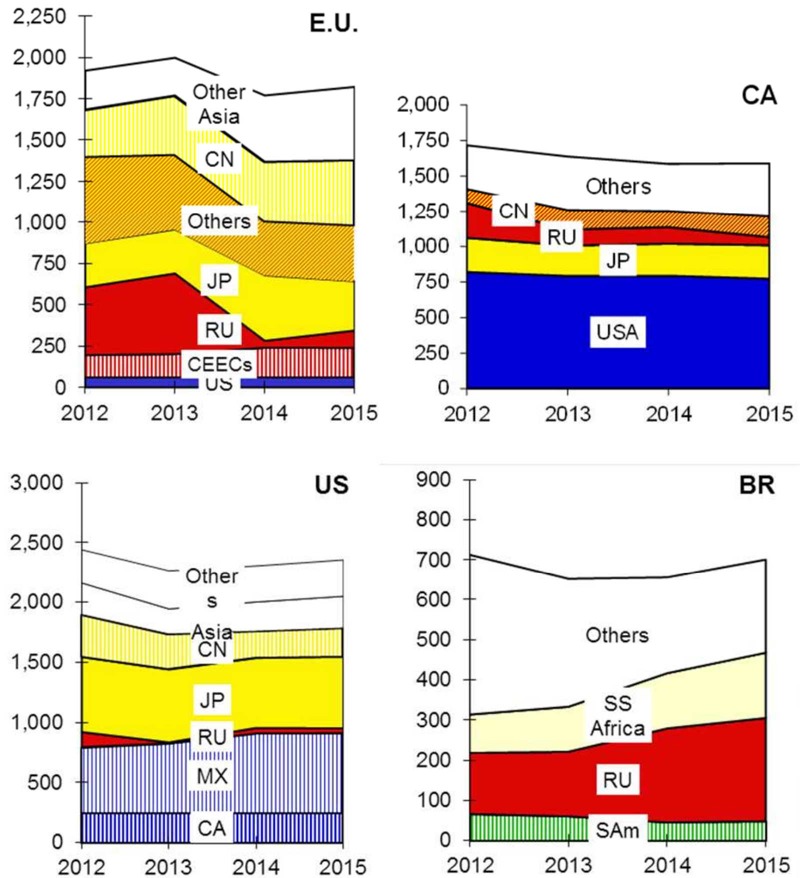
(sans la CN, 2013 production : 54,5 mio. t cwe)



Source: GIRA

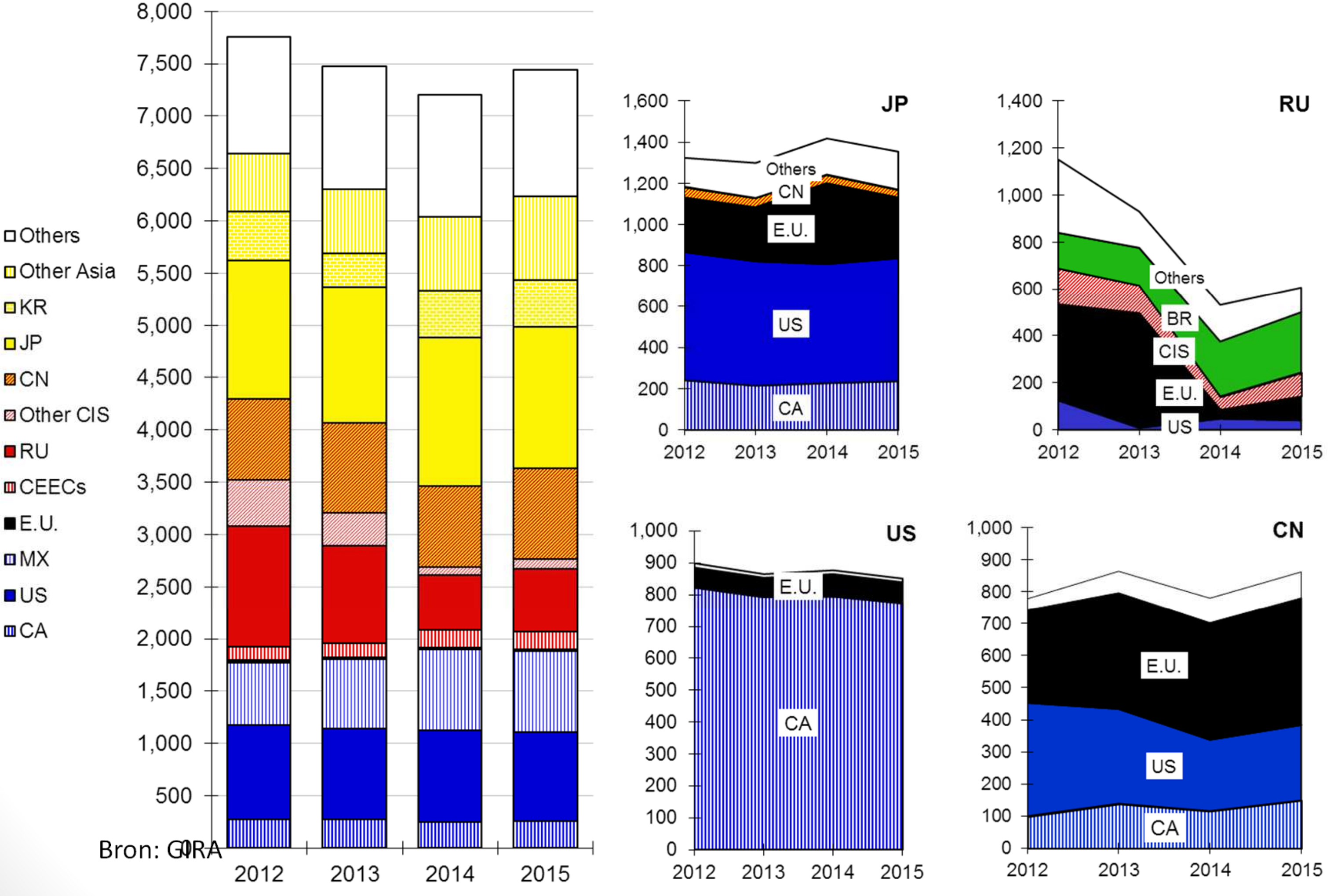
Exportateurs 2012-2015(f) (x 1000 ton cw , incl. live)





Bron: GIRA

Importateurs 2012-2015(f) (x 1000 ton cw, incl. live)



Bron: GIRA

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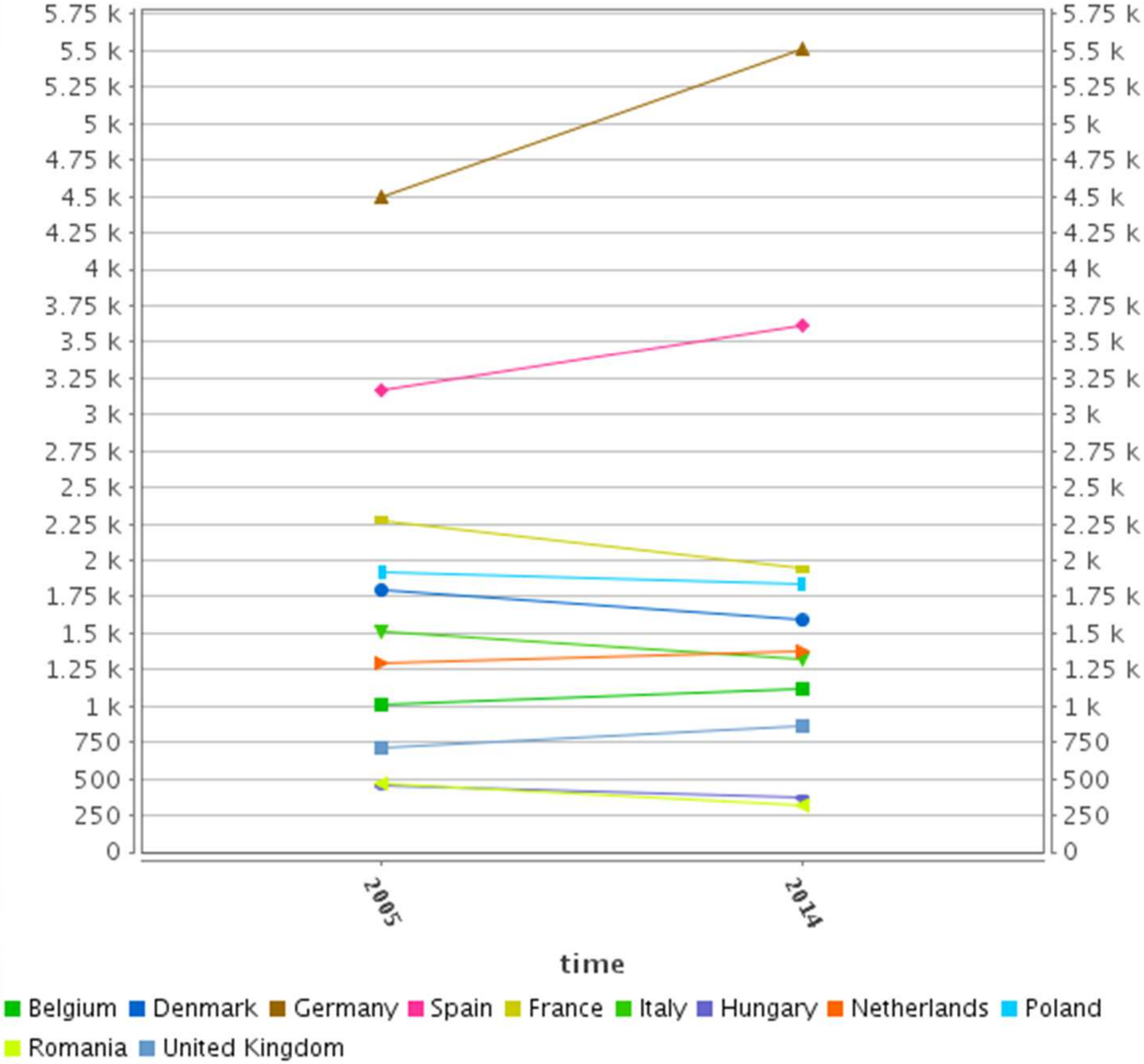
UE - production de viande porcine
(2005-2014)



- Total production 22,5 mio ton
- Production in Germany +22% and Spain +14% grew most
- BE +10%, NL +6%
- DK -11%,
- PL -5%

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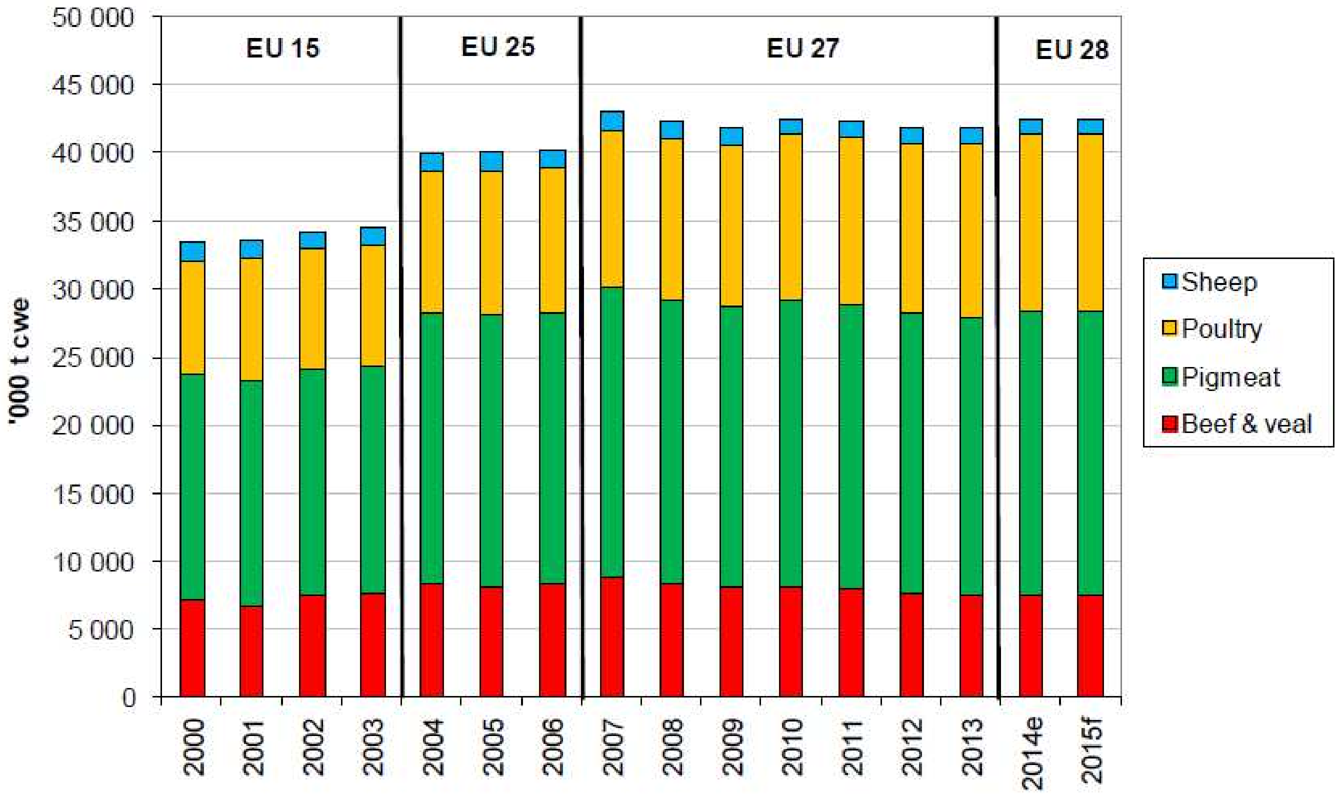
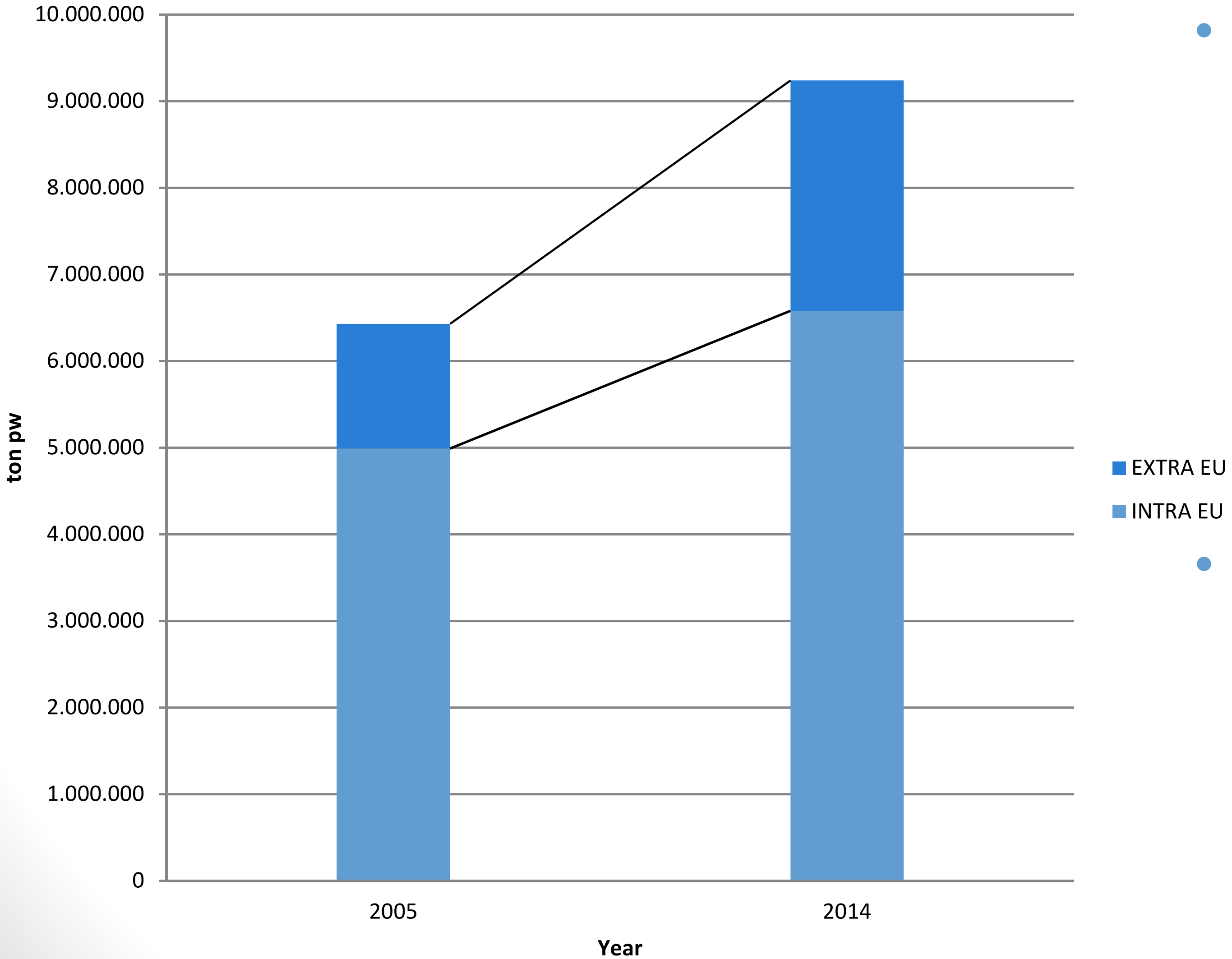
UE - consommation viandes (2000-2015)



- Consommation viande de porc 2014: 19.900.000 ton
- 2014 and 2015f légère croissance
- 112% autosuffisance

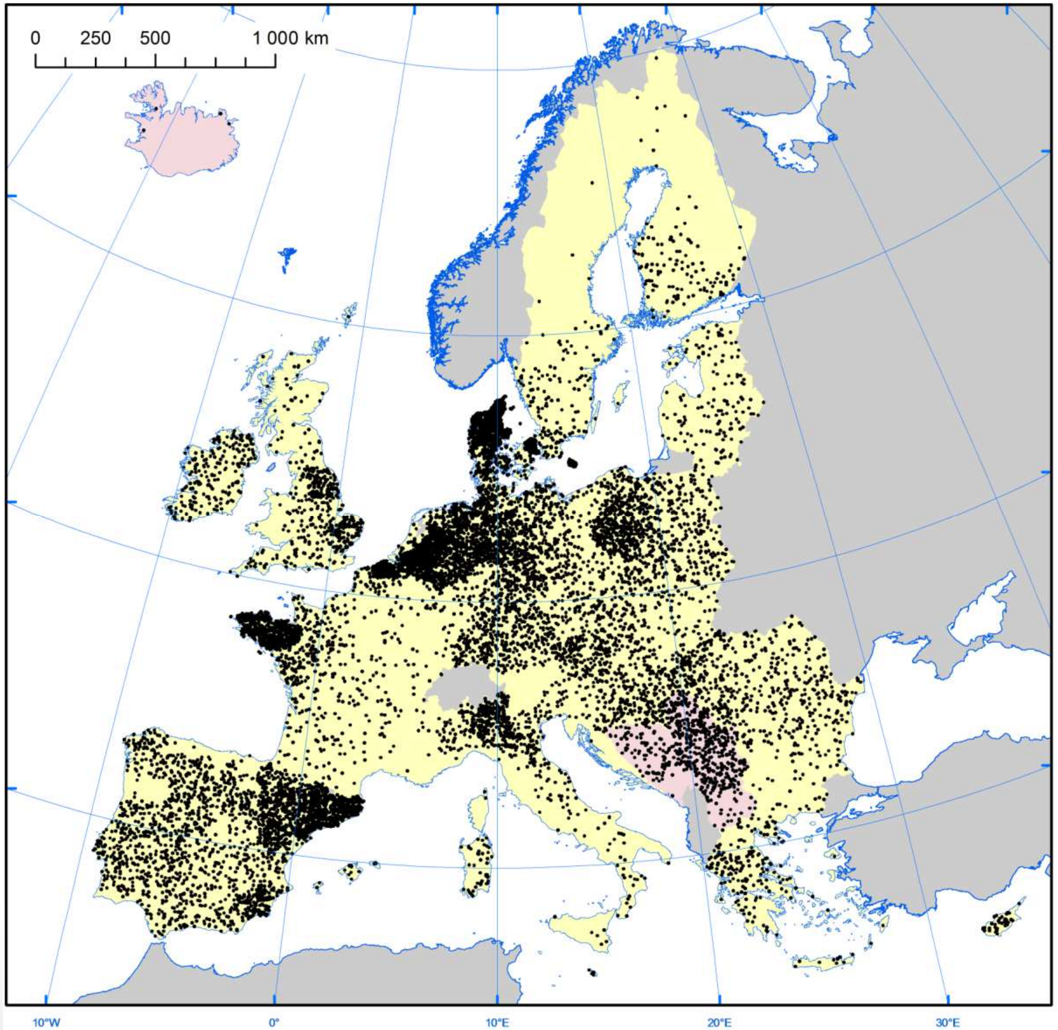
UE - commerce intra et extra

(2005-2014)



- 2005-2014: forte croissance
- Mais déclin récent 2014 (embargo russe), puis reprise 2016 (Chine + HK)

EU – nombre de truies par région

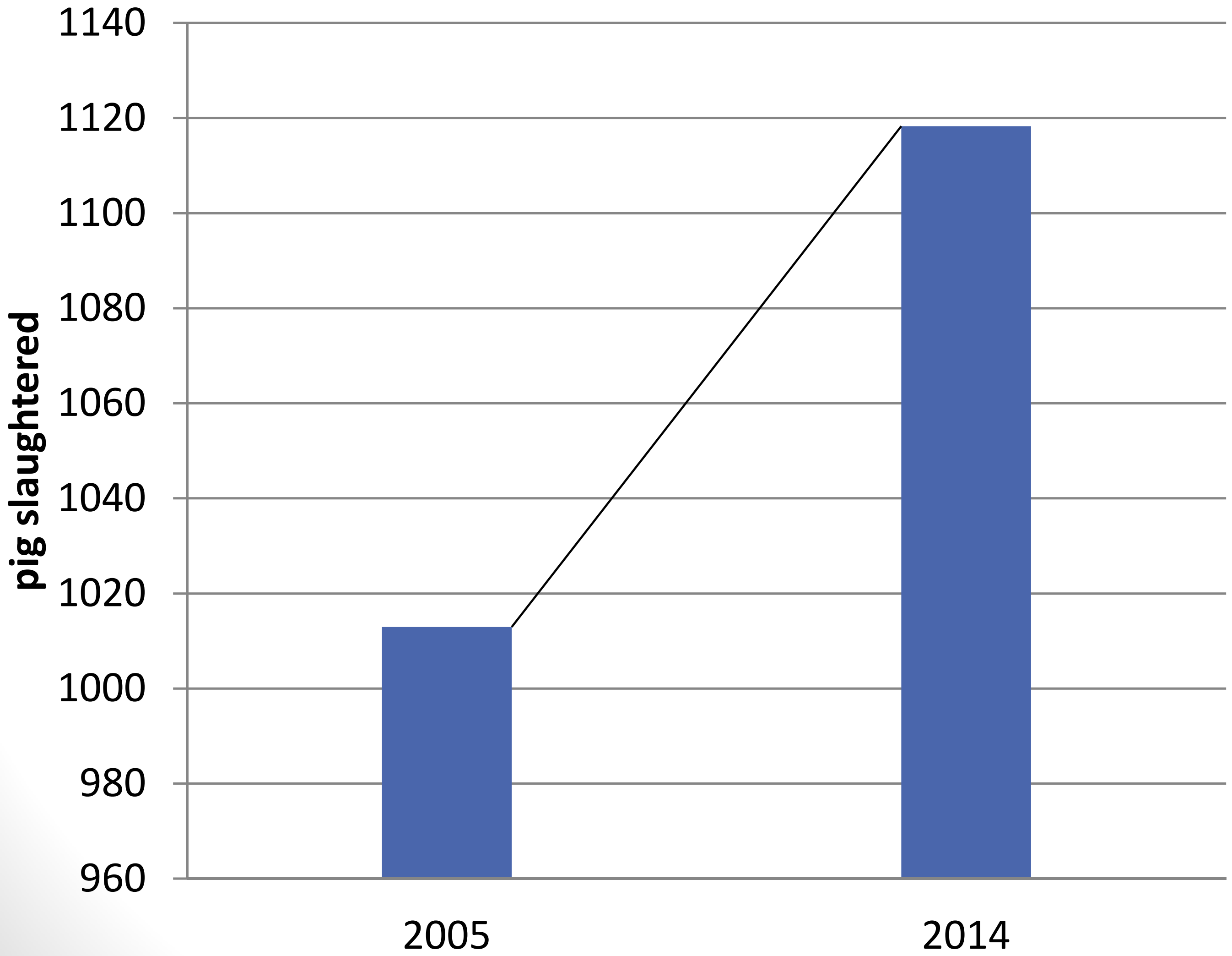


- concentration accrue des bassins de production

La Belgique au coeur de l'Europe (et donc exposée)

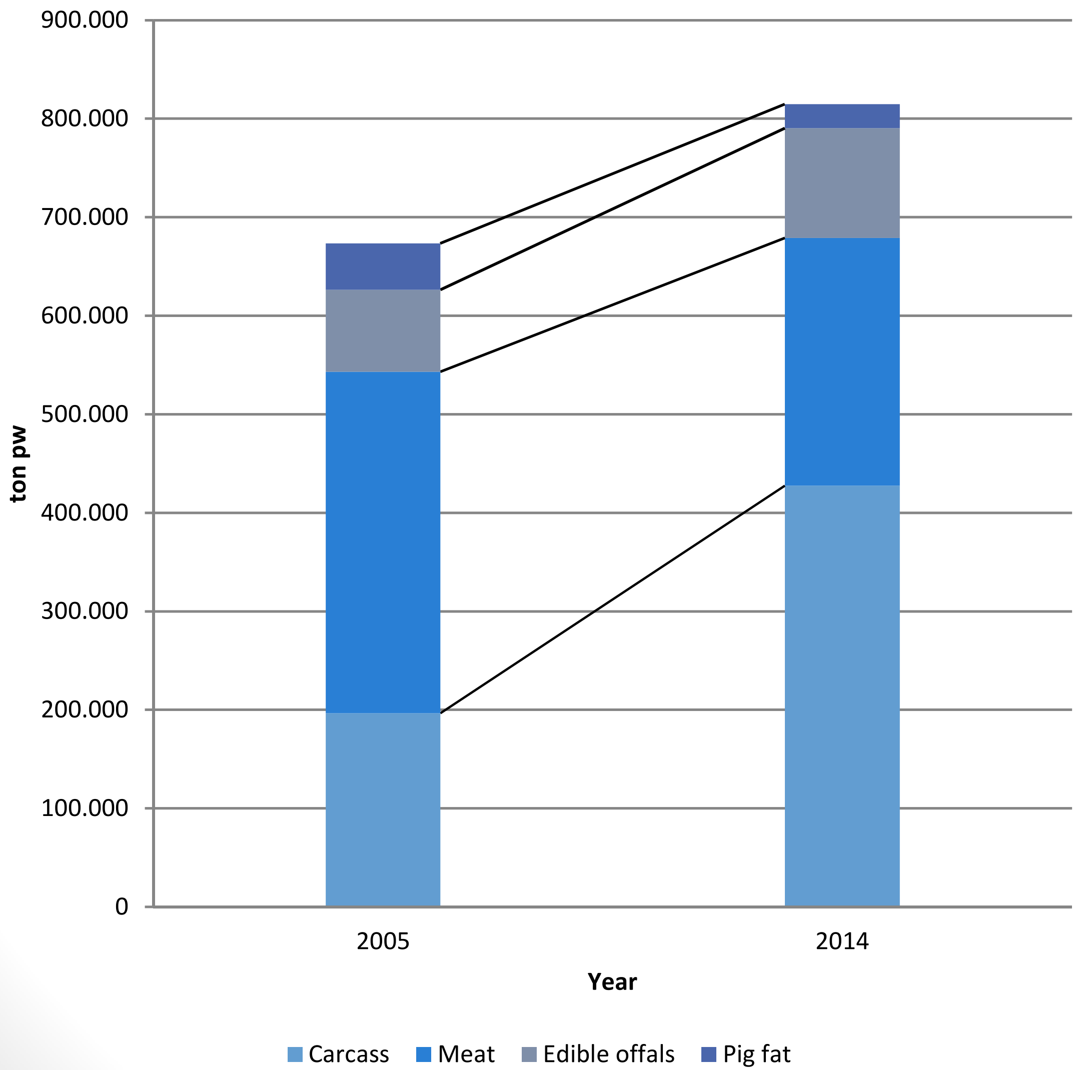
BE - production de viande porcine (abattages, x1.000 ton cw)

(2005-2014)



- 2005: 1.012.930 tonnes
- 2014:
- 1.118.330 tonnes

BE - exportations de viande porcine toutes destinations (2005-2014)



- 2005: 670.000 t
  - 540.000 t viande
  - 83.000 t abats
  - 47.000 t gras
- 2014: 814.000 t
  - 679.000 t viande
  - 111.000 t abats
  - 24.000 t gras

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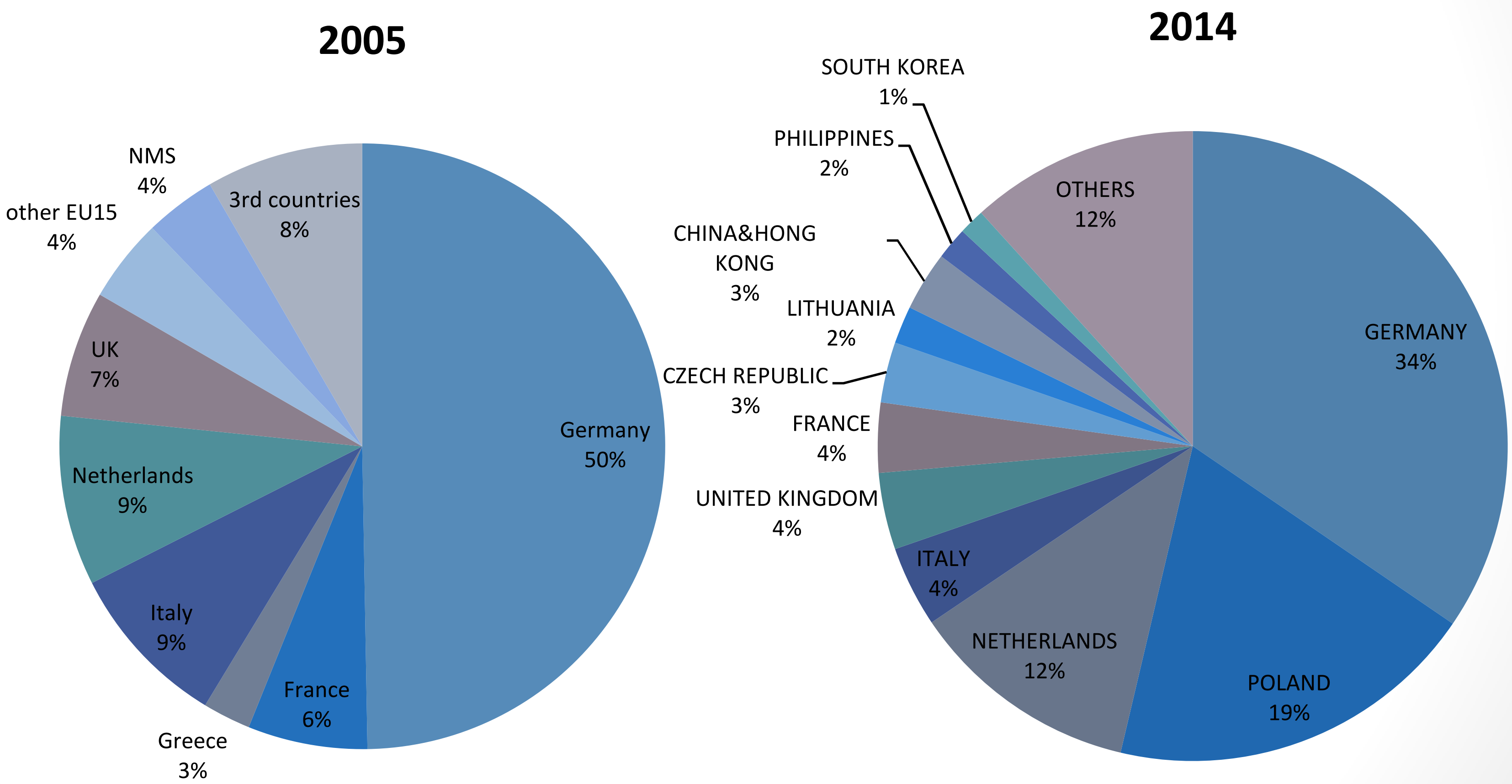
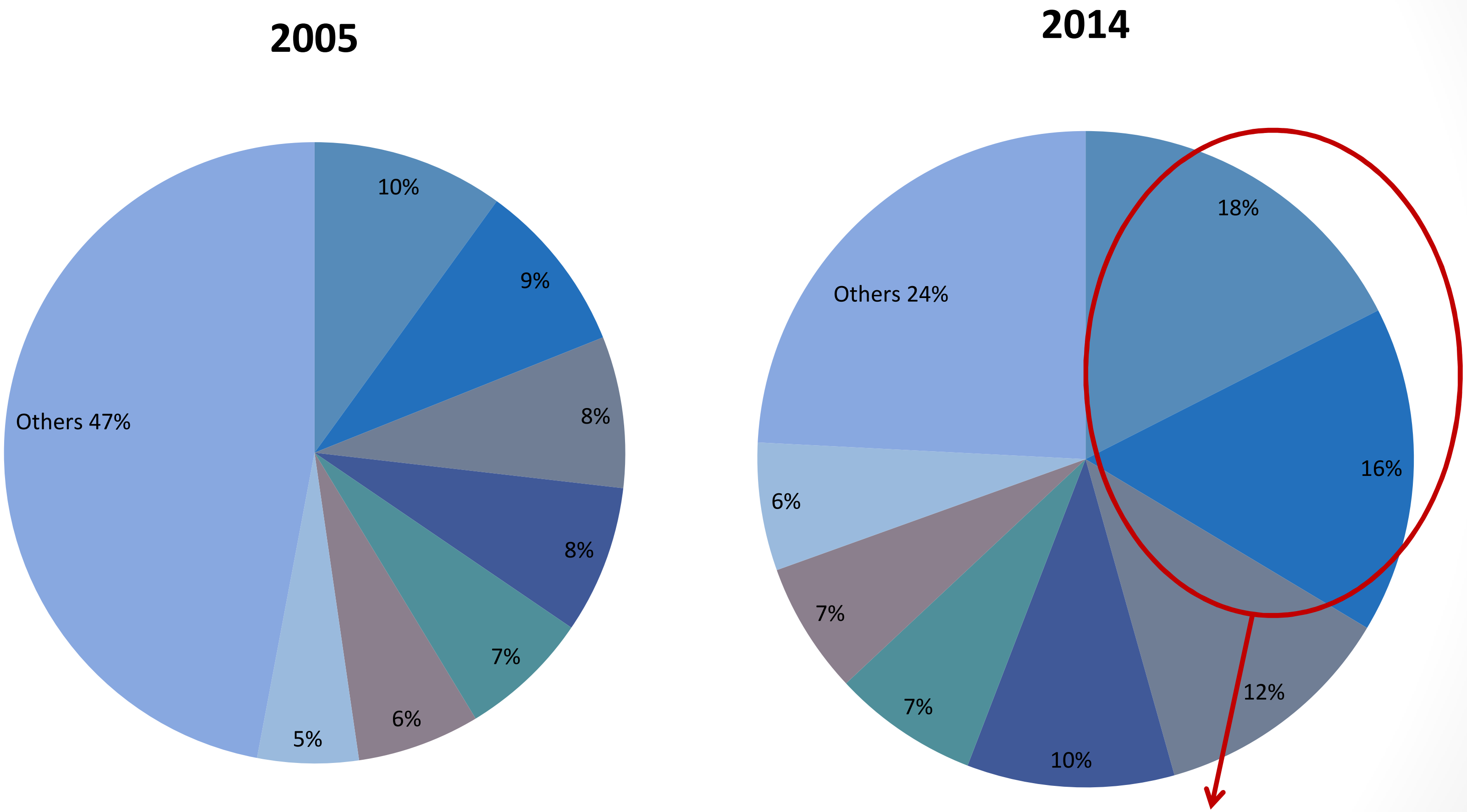
Exportation: destinations viande porcine BE



les grands opérateurs BE : quote-parts d'abattage (2005-2014)



- N°1&2 fusionnent
    - 34% des abattages de porc BE

2005: conclusions "*marchés*" pour le secteur viande rouge BE

- L'industrie belge a une **forte position sur** ***le marché domestique***, étant **significativement différente** des autres marchés européens
  - Préférence pour viande maigre des races sélectionnées
  - Grande part de marché de viandes fraiches élaborées
  - *Pas de renversement vers les viandes importées*
  - *……….. Et ensuite ?*

Slide: Round Table Belgian Meat Office, 2005

2005: conclusions *"industrie"* pour le secteur viande rouge BE

- **Actionnariat familial** rend la **restructuration difficile**

- **Handicap salarial (vs l'Allemagne)**
  - Renversement de tendance exportation carcasses et découpes
  - Problème de marge pour la seconde découpe à l'exportation

  - ……..et ensuite?

Slide: Round Table Belgian Meat Office, 2005

Nil nove sub sole: “ perpetuum mobile “

En vous remerciant.

Questions ?

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