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**Report Highlights:**

The cattle and swine sector suffered from a dry summer especially in the Northern part of the EU. The shortage of fodder elevated the slaughter of cattle and caused a further decline in the size of the herd. Most of the additional beef supply will be absorbed by the domestic market. Despite many challenges facing the EU swine sector a record crop of piglets and pork production is forecast to support pork exports to increase to a significantly higher level this year. China is expected to be the main growth market.

## **Executive Summary**

### ***Cattle & Beef***

In Northern Europe, extreme dry weather conditions affected the production of fodder and further deteriorated the profitability of the beef and dairy sector. The cattle herd is structurally declining in most European Union (EU) Member States as a result of elevated slaughter and beef production. Exceptions to this overall trend include the dairy sector in Ireland and Poland, and the fattening of cattle for export in Spain. The elevated slaughter levels resulted in an oversupply of beef, which will be absorbed by the market based on its versatility. The demand for high quality beef cuts is still there but the imports are restricted by quotas.

### ***Swine & Pork***

The EU swine sector faced significant challenges during 2018. Rising feed prices, outbreaks of African Swine Fever and a falling demand from China, pressed piglet and carcass prices, and has slashed the income of both breeders and fatteners. However, soybean and corn imports from the United States and corn imports from Ukraine helped to ease the feed shortages. As a result, a record volume of pork is forecasted. Although the EU sow herd has been decimated, improved fertility and lower feed prices are forecast to result in a volume only slightly below the record achieved last year. The newly produced volume combined with the pork in storage is projected to support exports to close to the record reached in 2016. While the EU pork sector has attempted to diversify its exports, China is still regarded as the main growth market.

### ***Policy***

-The Romanian EU presidency is hoping to reach a compromise on a new Common Agricultural Policy (CAP) framework before the end of June when its presidency ends. The new CAP is expected to become effective at the beginning of 2021. One of the main topics of discussion is a likely budget cut as a result of Brexit, and just how much budget will remain for the cattle sector.

-After its first occurrence in the Baltics in 2014, African Swine Fever (ASF) continues to expand in Central Europe, in particular in Poland. In September 2018, ASF was also found in the wild boar population in the south of Belgium close to the border with France, Luxembourg and Germany. European Commission services are trying to preserve future pork trade by seeking acceptance of the concept of 'regionalization' with its Asian trade partners, particularly China and Japan, which, unlike the United States and Canada, currently do not recognize EU regionalization.

## Cattle

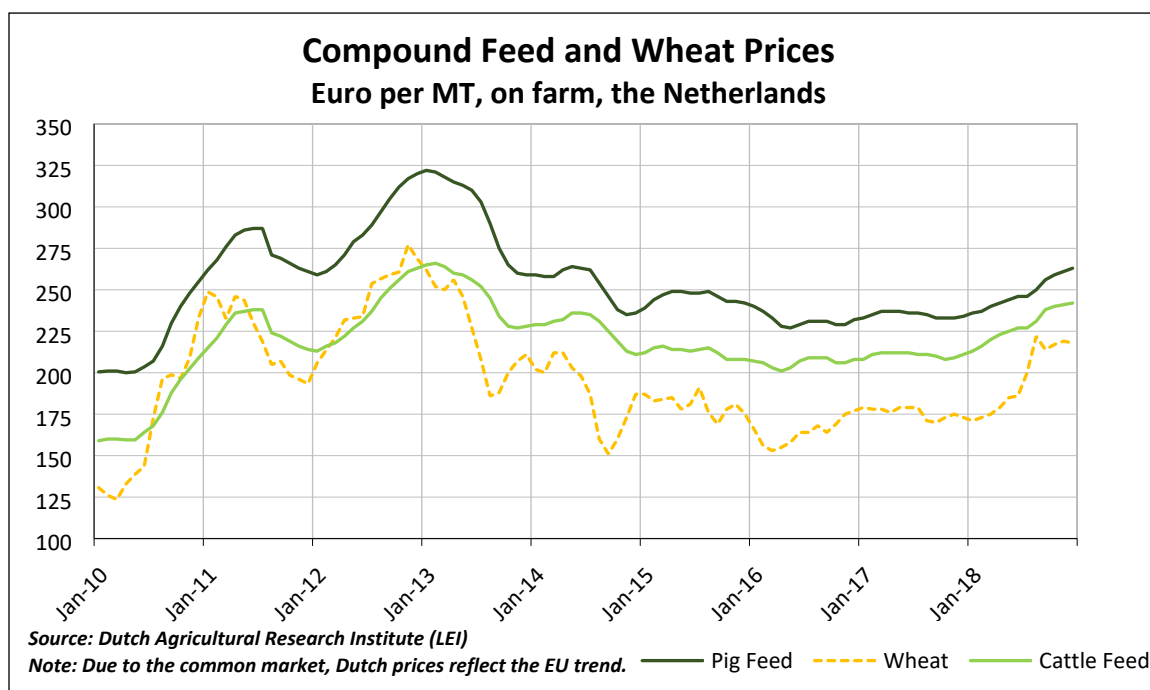
Animal Numbers, Cattle	2017		2018		2019	
Market Begin Year	Jan 2017		Jan 2018		Jan 2019	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stks	89,152	89,152	88,439	88,819	87,290	87,508
Dairy Cows Beg. Stks	23,525	23,525	23,311	23,311	23,250	22,937
Beef Cows Beg. Stocks	12,342	12,342	12,303	12,308	12,200	12,207
Production (Calf Crop)	29,180	29,550	29,000	29,080	28,900	28,800
Total Imports	0	0	0	0	0	0
Total Supply	118,332	118,702	117,439	117,899	116,190	116,308
Total Exports	1,031	1,028	1,100	1,104	1,000	1,150
Cow Slaughter	11,778	11,787	11,950	12,200	11,800	11,750
Calf Slaughter	6,593	6,602	6,500	6,550	6,500	6,500
Other Slaughter	8,657	8,664	8,750	8,750	8,600	8,550
Total Slaughter	27,028	27,053	27,200	27,500	26,900	26,800
Loss	1,834	1,802	1,849	1,787	1,800	1,758
Ending Inventories	88,439	88,819	87,290	87,508	86,490	86,600
Total Distribution	118,332	118,702	117,439	117,899	116,190	116,308
(1,000 HEAD)						

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

### ***The dry summer affected the fodder supply and profitability of the sector.***

Since the start of 2017, the overall EU cattle herd has been on the decline. The December 2017 census statistics have been revised by Eurostat, resulting in a higher beginning stock in 2018. While both dairy and beef cattle farmers already faced slim or negative margins, high feed prices during 2018 further deteriorated their position

(see graph below). In Northern Europe, from Ireland to Poland, the sector experienced exceptionally dry weather conditions during the summer of 2018. This will affect the availability of fodder up to the spring of this year. In particular fodders for cattle, such as hay and corn for silage, were affected. In contrast, in the Southeast part of the EU, excellent pasture and crop growing conditions were reported, with the effect of increased production in both the beef and dairy herds. For more information about the drought see the reports from various Foreign Agricultural Service (FAS) Posts listed at the end of this report.

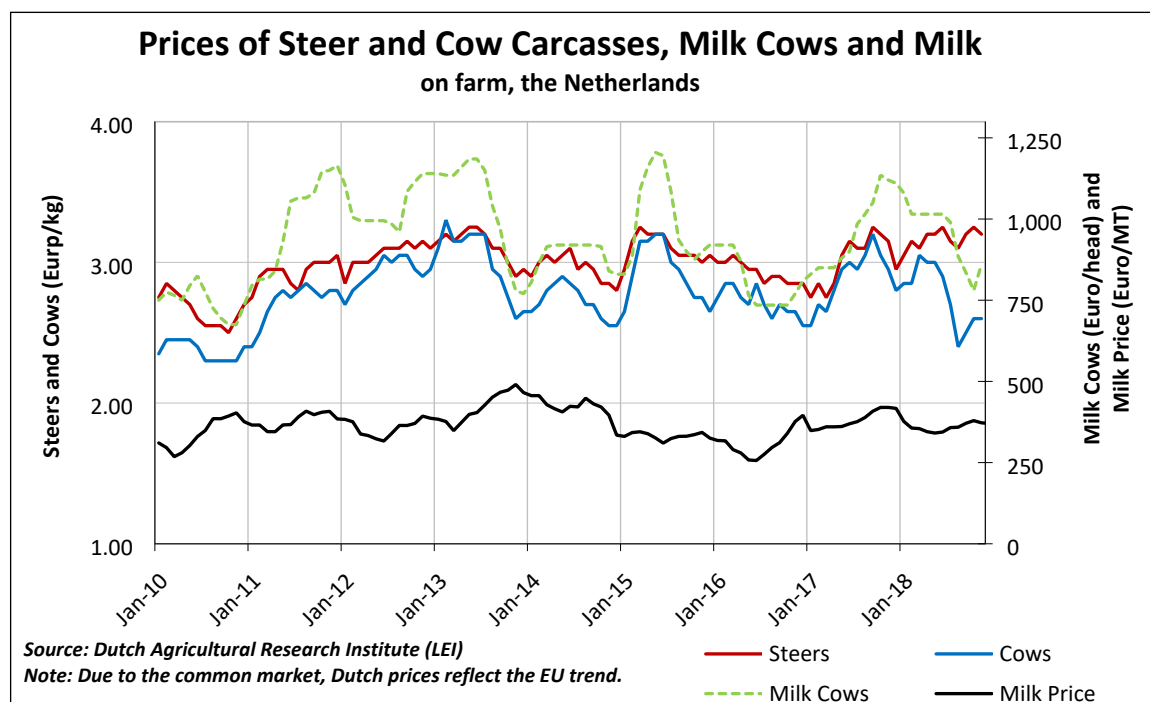


### ***The lack of profitability and high fodder prices supported slaughter.***

During the first eleven months of 2018, official cattle slaughter increased by 1.7 percent. It should be noted that during the first half of the year slaughter was already at 1.5 percent above the level reported during same period in 2017. Given, the weather and fodder situation, elevated backyard slaughter would be expected; however, Eurostat figures don't show such a trend. The elevated official slaughter and reduced cattle crop are estimated to cut the EU herd by about 1.3 million animals in 2018, the highest reduction since 2010. This year's slaughter is forecast to decline but at a relatively high level compared to the herd size. As a result, the cattle herd will be cut by another 0.9 million head of cattle in 2019. Based on the high slaughter to inventory ratios, the year 2018 is comparable with 2011. Whereas in 2018 the sector suffered from a drought, in the year 2011, the sector was hit by the phase out of government support.

During 2017-2019, the herds that are expected to be reduced the most are those in France, Germany, the Netherlands and Belgium. The reduction of the German, French and Belgian herd is structural and caused by the unprofitability of the sector. Due to competitive pressures in the dairy sector, the least efficient farmers and dairy cattle are being phased out. The excess of cattle for slaughter is putting pressure on cattle prices (see graph below), which is further deteriorating margins. The reduction of the herd in the Netherlands is a result of

the mandatory government program to reduce phosphate emissions (for more information see GAIN report NL7006 - [New Phosphate Reduction Plan Sets Limits to Dutch Dairy Production](#), published on February 9, 2017).



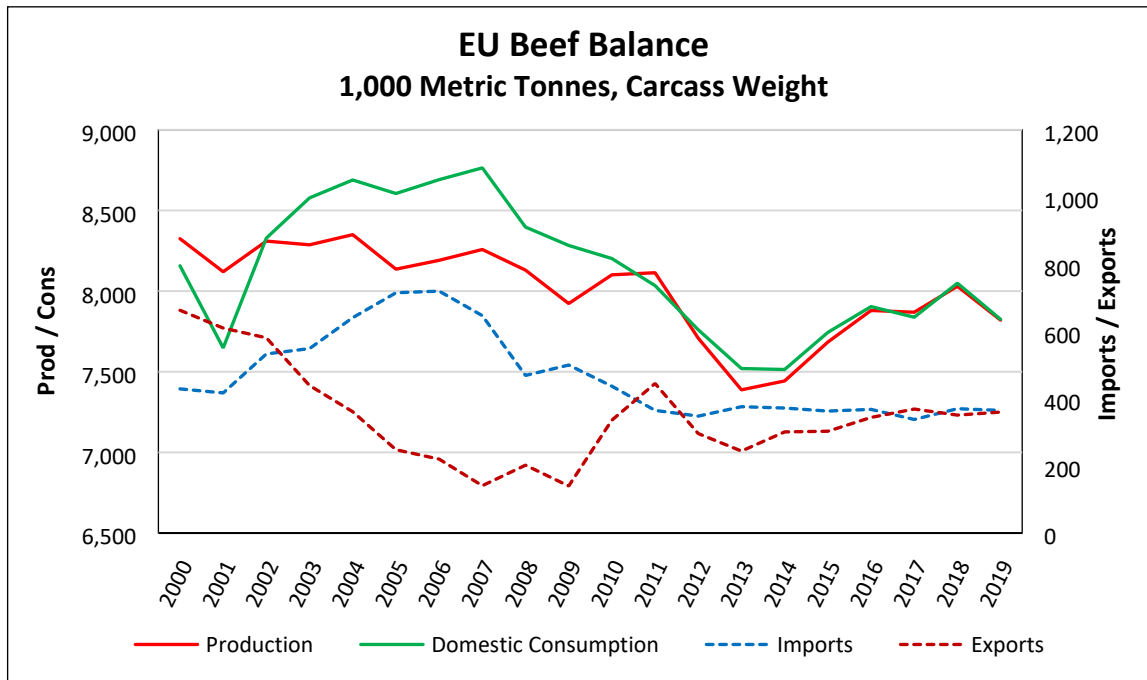
**Exports to third countries are an important factor for sustaining production.**

Exceptions to the declining trend are reported for the sector in Ireland, Poland and Spain. In Ireland, the growing dairy herd more than offsets the ongoing decline in the beef herd. In Poland, both the dairy and beef herds are expanding. Polish farmers see milk production as profitable and providing a stable income, and as a result have more interest in fattening animals. Despite the fact that the price support received per animal has declined, the Spanish cattle herd expanded due to strong demand from third countries (for further details see GAIN report SP1906 – [Spain Gets Green Light to Ship Fresh Pork to China](#), published on January 25, 2019). In Spain, Croatia, Romania and Hungary, the future of the beef cattle sector largely depends on whether cattle exports to Africa and the Middle East can be sustained. In 2018, EU live cattle trade expanded due to increased exports to Algeria, Lebanon, Libya and Russia. Exports to Turkey were cut due to the devaluation of the Lira against the Euro. Currently exports to Turkey are reportedly restricted by the Turkish government in an attempt to control the oversupply of animals in the country. The markets in Northern Africa offer potential for export growth, but Foot and Mouth Disease outbreaks in these countries could force the authorities to close their borders for imports. As a wide range of markets is still accessible, exports are anticipated to be sustained this year. The EU cattle sector increasingly depends on exports. During 2000-2010, about one percent of the production was exported. Currently about four percent of the produced animals are exported to third countries.

## Beef

Meat, Beef and Veal	2017		2018		2019	
Market Begin Year	Jan 2017		Jan 2018		Jan 2019	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	27,028	27,053	27,200	27,500	26,900	26,800
Beginning Stocks	0	0	0	0	0	0
Production	7,863	7,869	7,915	8,030	7,800	7,820
Total Imports	338	338	370	370	370	365
Total Supply	8,201	8,207	8,285	8,400	8,170	8,185
Total Exports	369	369	350	351	350	360
Human Consumption	7,832	7,838	7,935	8,049	7,820	7,825
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	7,832	7,838	7,935	8,049	7,820	7,825
Ending Stocks	0	0	0	0	0	0
Total Distribution	8,201	8,207	8,285	8,400	8,170	8,185
(1,000 HEAD) ,(1000 MT CWE)						

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



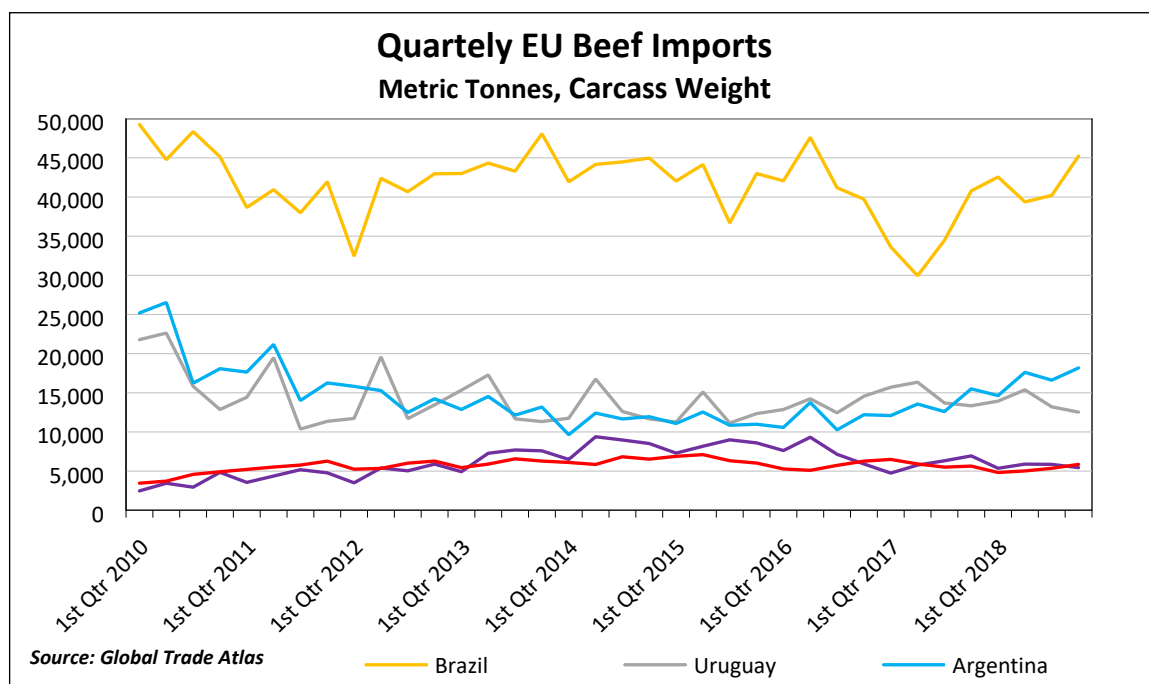
***Most of the elevated supply will be absorbed by the domestic market.***

During 2018, slaughter rose to 27.5 million animals, and beef production rose to 8.0 million mt, both the highest level recorded since 2011. The drought not only elevated slaughter but also increased the average weight of the animals slaughtered due to the fact that a higher percentage of animals slaughtered were adult cattle. The average weight increased from 290.9 kg to 292.0 kg, the highest average weight ever reported by Eurostat. While beef production peaked, with an additional production of 200,000 mt CW, EU consumer demand for beef is sluggish in most Member State consumer markets. The image of beef still suffers from the scandals in the past, such as the Bovine Spongiform Encephalopathy (BSE) outbreak and the mingling of horse meat with beef. Recently, another incident was made public. On January 26, 2019, Polish television revealed that beef from a processing plant in Kalinowo illegally slaughtered sick and downer cattle without official regulatory oversight. Meat from the plant was shipped to over 20 different places around Poland and to export markets throughout the EU. The Kalinowo plant was immediately closed by Polish Veterinary Service, but the scandal further depressed the image of beef. Furthermore, the strong Euro against the currencies in export markets is restricting exports, in particular to Turkey. But there are some domestic growth markets such as the market for high quality beef in Germany and the food service sector in Spain. Also the demand for minced beef is good, which because of its versatility can be used as ingredient in many products and dishes, and thus easily be absorbed by the domestic market.

***Import quotas are restricting the import of high quality beef.***

During 2018, EU beef imports increased about ten percent, mainly due to increased shipments from Brazil and Argentina (see graph below). From Brazil, an increased volume of lower value frozen boneless and corned beef was imported, and from Argentina higher value chilled boneless beef. Brazil is anticipated to reach pre-2017 levels of exports to the EU of around 170,000 mt CW. Argentina is expected to reach a level of about 70,000 mt

CW. The allocated quantity in the Hilton quota (20 percent duty) of 29,500 mt PW is forecast to be fully used by Argentina. The Hilton quota is also increasingly used for importing beef from the United States and Australia. Imports of fresh chilled beef from the United States through the zero duty High Quality Beef Quota are being squeezed by increased competition, mainly from Argentina.



## Swine

Animal Numbers, Swine	2017		2018		2019	
Market Begin Year	Jan 2017		Jan 2018		Jan 2019	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning Stocks	147,188	147,188	150,000	150,257	148,900	148,766
Sow Beginning Stocks	12,022	12,022	12,153	12,164	12,000	11,805
Production (Pig Crop)	267,000	267,250	271,500	270,000	269,000	268,000
Total Imports	6	6	8	3	8	3
Total Supply	414,194	414,444	421,508	420,260	417,908	416,769
Total Exports	339	339	600	510	500	550



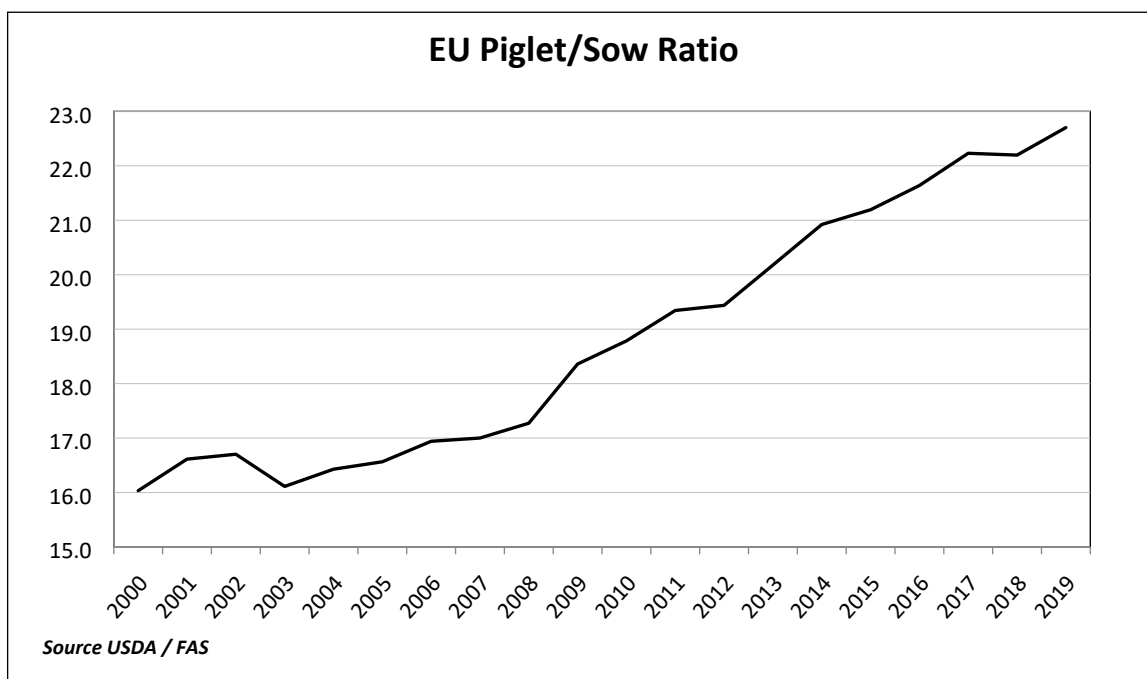
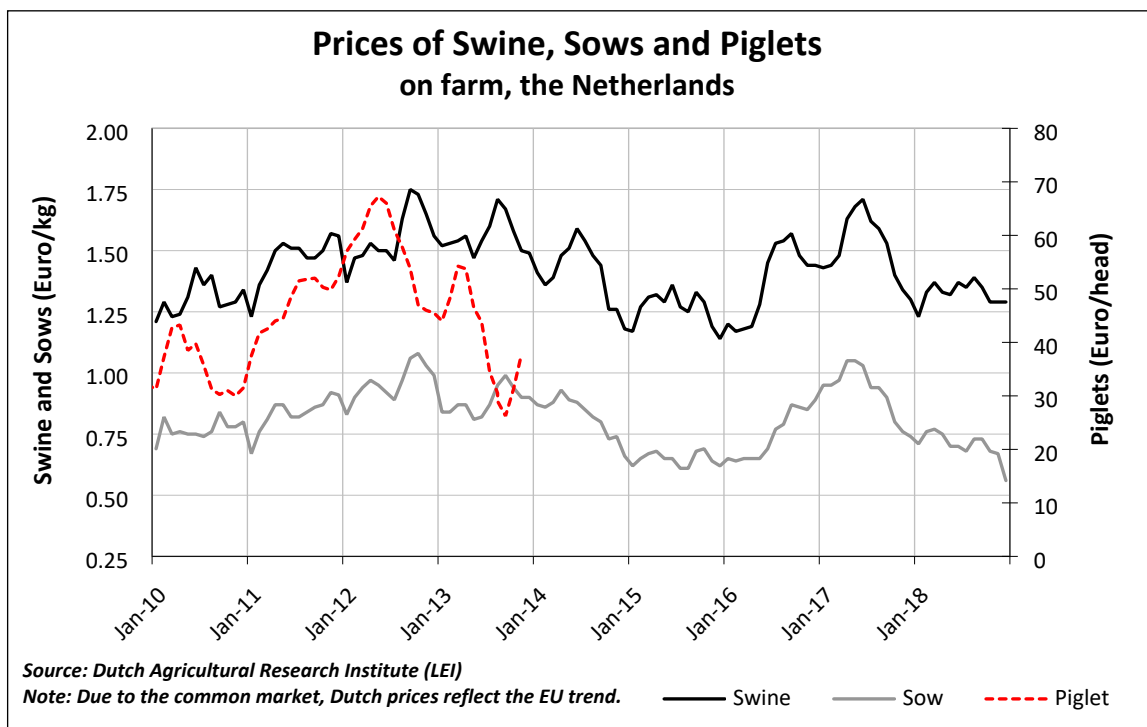
<b>Sow Slaughter</b>	3,686	3,686	3,850	3,850	3,800	3,700
<b>Other Slaughter</b>	254,566	254,580	262,150	260,650	259,700	258,300
<b>Total Slaughter</b>	258,252	258,266	266,000	264,500	263,500	262,000
<b>Loss</b>	5,603	5,582	6,008	6,484	5,708	5,499
<b>Ending Inventories</b>	150,000	150,257	148,900	148,766	148,200	148,720
<b>Total Distribution</b>	414,194	414,444	421,508	420,260	417,908	416,769
(1,000 HEAD)						

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

***The EU swine breeding sector experienced a “perfect storm”.***

Similar to the cattle sector, the hot and dry summer of 2018 had a significant effect on the swine sector. Extreme weather conditions occurred mainly in Northern Europe, and affected five main pork producing countries: Poland, Germany, the Netherlands, Belgium and Denmark. At the beginning of 2018, the swine sector started with a large and productive sow herd, stimulated by the high piglet prices in 2017. These good market conditions were solely a result of the rising import demand for pork in China. As a result, a record crop of piglets was produced last year. But by mid-2018, the market conditions worsened significantly, with rising feed prices and the lowest piglet prices reported since 2007 (see graph below). In addition, a heat wave affected the productivity of the breeding stock. That productivity is expressed as the annual production of weaned piglets per sow. This ratio steadily increased from 16 piglets in 2000 to about 22 currently, an increase of about 2 percent per year (see graph further below). For 2018, this ratio stagnated at 22.2. The Danish swine sector was particularly affected by the dry weather and low piglet prices because of its dependence on on-farm feed production and piglet exports.

As an example of the financial crisis in the swine sector, Dutch breeders made a profit of on average €200,000 in 2017, but faced a loss of €86,000 last year. As a result of this market situation, the EU sow herd has been cut by 3.0 percent, resulting in a significantly lower breeding herd at the beginning of this year. Official Eurostat statics report the highest reductions of sows during 2018 in Poland (164,000 head), the Netherlands (96,000 head) and Germany (72,000 head). A significant increase of 47,000 sows is reported in Spain.



***The dry summer also affected the profit margin of fattening swine.***

The income of Dutch fatteners fell from €72,000 in 2017 to €26,000 in 2018. First of all, swine feed prices rose, see the graph further above. The shortage of feed and subsequent high prices were partly offset by elevated imports of corn imported from Ukraine and corn and soybeans from the United States. For more information

see the FAS Grain & Feed, and the FAS Oilseeds updates listed in the table at the end of this report. The elevated feed prices will have a negative effect on fattening up to the next harvest in the spring of this year. High feed prices also had a notable effect on production statistics, such as the slaughter weights (see Pork Section). However, official Eurostat statistics reveal that the overall annual slaughter weight did not decline as anticipated.

***Despite the bad conditions production reached a record level.***

It can be concluded that the hot and dry summer of 2018 reduced the piglet and slaughter hog supply by about 5 million animals, which is about 1.5 million more animals than forecast in September. The drop in piglet supply is also evidently expressed in the price, the price for piglets recovered since September (see graph above). Nevertheless, despite the weather and market conditions, the pig crop and slaughter still reached a record as forecast. The most significant cut in the pig crop and slaughter was reported in Germany. The pig crop and slaughter rose in Spain, the Netherlands and Denmark. For the entire EU, official slaughter statistics report an increase of 2.3 percent during the first eleven months of 2018.

***The pig crop and slaughter are forecast to remain at a high level in 2019.***

For 2019, the sector will start with a significantly lower sow herd, but with better weather conditions and anticipated lower feed and higher piglet prices so that productivity is forecast to recover sharply. The increased piglet per sow ratio will result in only a slightly lower pig crop this year. Piglet production will expand in Spain, and to a lesser extent in Hungary, Bulgaria and Greece. Major cuts are forecast in Poland, Germany and the Netherlands. The bulk of the piglets will be fattened this year and slaughtered in 2020. With this assumption, slaughter is forecast to decline to about 2.5 million head this year, which is still second to the record reached last year. Two factors are important for what will eventually happen: the Chinese import demand for pork and the outbreaks of African Swine Fever (ASF). ASF outbreaks have been reported in Lithuania, Latvia, Estonia, Poland, the Czech Republic, Hungary, Bulgaria, Romania and Belgium, resulting in import bans and a subsequent drop in carcass prices in these countries.

## Pork

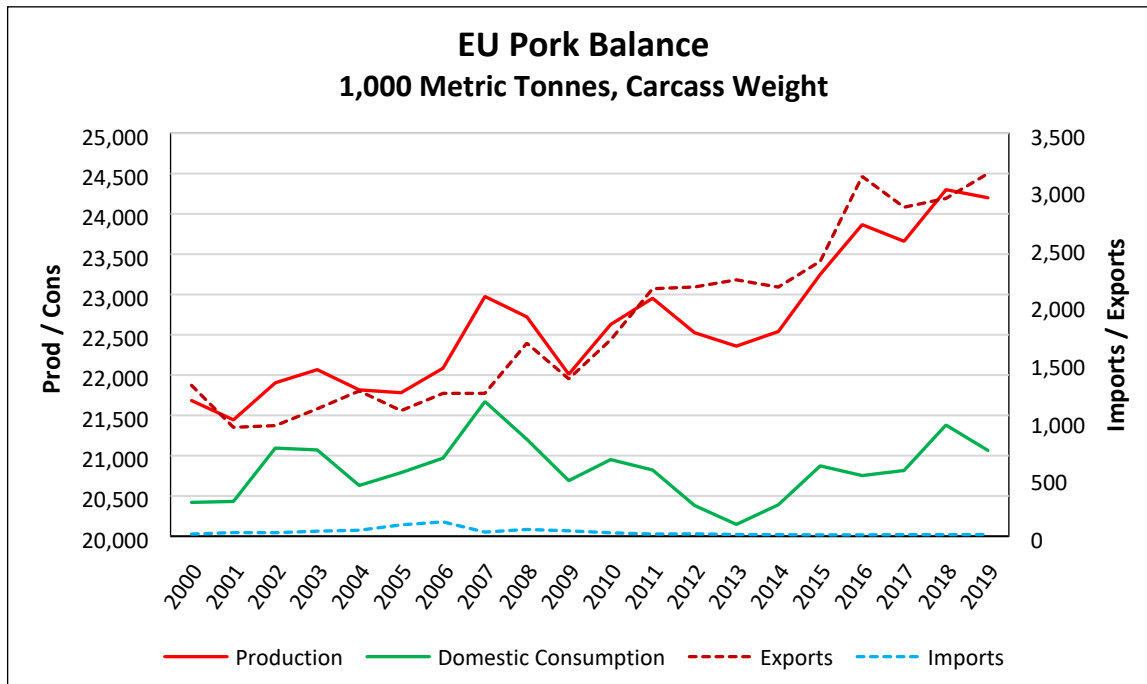
Meat, Swine	2017		2018		2019	
Market Begin Year	Jan 2017		Jan 2018		Jan 2019	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	258,252	258,266	266,000	264,500	263,500	262,000
Beginning Stocks	0	0	0	0	0	0
Production	23,663	23,660	24,100	24,300	24,000	24,150

<b>Total Imports</b>	14	14	15	14	15	15
<b>Total Supply</b>	23,677	23,674	24,115	24,314	24,015	24,165
<b>Total Exports</b>	2,860	2,858	3,050	2,934	3,150	3,100
<b>Human Consumption</b>	20,817	20,816	21,065	21,380	20,865	21,065
<b>Other Use, Losses</b>	0	0	0	0	0	0
<b>Total Dom. Consumption</b>	20,817	20,816	21,065	21,380	20,865	21,065
<b>Ending Stocks</b>	0	0	0	0	0	0
<b>Total Distribution</b>	23,677	23,674	24,115	24,314	24,015	24,165
(1,000 HEAD) ,(1000 MT CWE)						

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

***Despite the hot summer, a record volume of pork was produced in 2018.***

Despite the extreme weather conditions cutting the piglet supply by about five million animals, the swine sector still achieved a record pork production level last year. The higher feed prices tempered the further increase of slaughter weights, but hogs were still heavier than slaughtered in 2017. During the first five months of the year the average slaughter weight increased by 1.0 percent, but levelled off during the summer. Compared to the summer (June – September) in 2017, slaughter weights during the summer of 2018 declined in most Northern countries such as the United Kingdom, Ireland, Denmark, the Netherlands, Belgium, the Baltics and France. Slaughter weights in Germany stabilized. For the whole year and EU region, the slaughter weight increased slightly, and combined with the record slaughter resulted in a record pork production of 24.3 million mt CW.



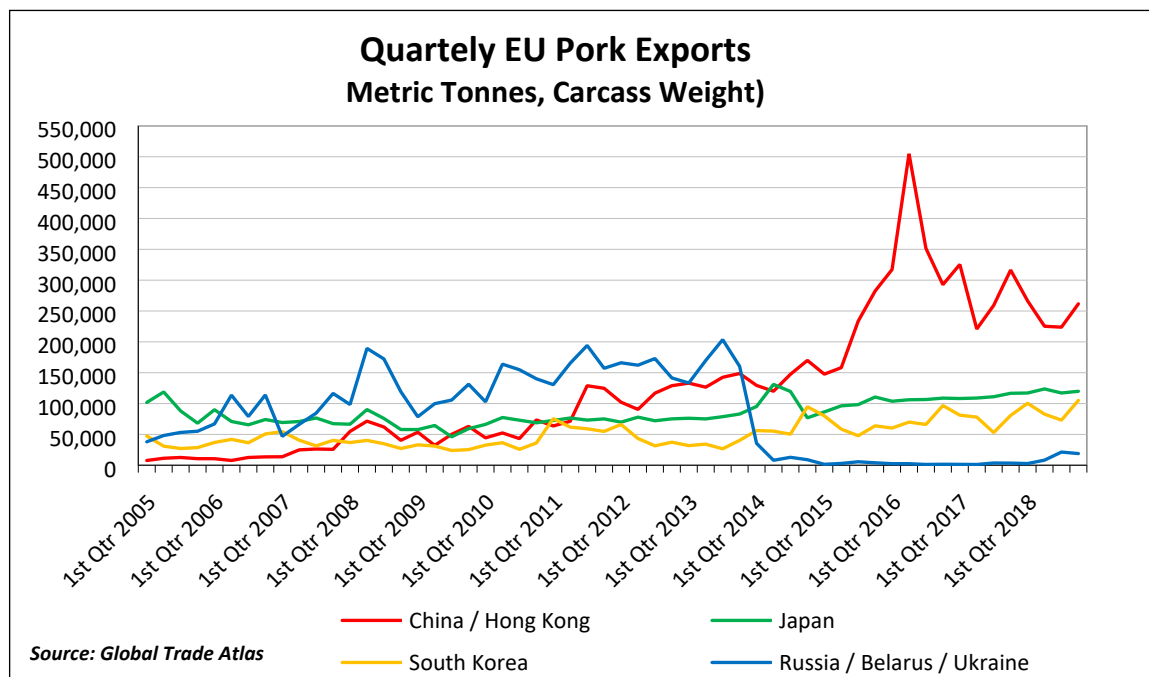
***Pork is stored as a result of lagging exports.***

During 2018, EU pork exports to China did not reach the record reported in 2016 (1.46 million mt CW), nor the level reported in 2017 (1.12 million mt CW), see the graph below. But the sector was able to expand exports to Japan, South Korea, the Philippines, Vietnam and the United States. EU Member States gaining export volumes were Spain, Germany and Poland. German exports rose to China and South Korea. Spanish and Dutch exports rose to Japan and South Korea. For the market share of pork in the three main Asian markets, see the graphs at the end of the report. Poland and Belgium, which suffered from ASF outbreaks have been banned from exporting to Asian markets. While production rose with 640,000 mt CW, exports only rose by 140,000 mt CW, which points to commercial stock building. Based on historic FAS figures, see the pork balance graph above, the EU consumption is estimated at a maximum of 21.0 million mt CW. As a result, about 300,000 MT CW is anticipated to be stored for postponed sales in either the domestic or export market. Low prices are expected to support domestic consumption in some Member States, but this trend is more than offset by the dwindling appetite for pork in the main market, namely Germany.

***Surplus production and storage are forecast to push exports.***

In 2019, the number of hogs slaughtered will fall, but due to heavier weights, pork production is forecast to reach a volume only slightly below the record level achieved last year. Push back from the domestic market is foreseen to press carcass prices further down, making EU pork competitive at export markets. The newly produced volume combined with the pork in storage is forecast to support exports close to the record reached in 2016. The Member States boosting production and exports in 2019 are expected to be Spain and Portugal. Major production cuts are forecast in Germany and Poland. While the EU pork sector has attempted to diversify its exports, China is still regarded as the main growth market. EU exports to China are forecast to grow in response to ASF outbreaks taking place in China and an increasing Chinese demand for meat. In

addition, Chinese imports tariffs on pork from the United States are seen as a competitive advantage. Although data show that it is mainly Brazil benefitting from reduced competition from the United States in China, even though the EU is still by far the largest pork supplier (see the graph further below). Spain, currently the EU's largest pork exporter, will also focus on Mexico and South America. In July 2018, Mexico implemented a duty-free pork quota of 350,000 mt PW in response to the U.S. steel and aluminum tariffs. As a result, Spanish pork exports to Mexico are expected to continue to grow. A volume of about 10,000 mt CW of Spanish pork, valued at \$33 million, was exported to Mexico in 2018, mainly high value salted, dried, smoked, and frozen pork. Currently, Mexico is Spain's main export destination outside the EU for Serrano ham.



#### A Snapshot of on 2018 Pork Imports by Asia

China			Japan			South Korea		
Brazil 350,507 mt 17.2%	Canada 10.4%	Fra.	United States 506,397 mt	Spain	United States 263,145 mt	Can.		
Germany 324,083 mt 15.9%	U.S. 7.8%	UK	Canada 306,661	Denmark	Germany	Chil		
Spain 307,384 mt 15.1%	Neth. 6.9%	Chil		Mexico	Spain	Oth		
	Denma	Irel.		Other		er		
		Oth						

# Policy

## **New Common Agricultural Policy (CAP) Post 2020 Discussion**

The Romanian EU presidency is hoping to reach a compromise deal on new framework text for the CAP before the end of its presidency at the end of June. For that, it has announced that it will table a compromise draft at the March 18 Agricultural Council meeting. A lot of the discussion centers around the diminished budget provisions because of United Kingdom leaving the EU (Brexit). Another topic of importance for the EU cattle sector is how much of the budget will remain available for coupled payments, especially for suckling cows. The new CAP is expected to become effective at the beginning of 2021.

## **African Swine Fever is Spreading Further**

Since African Swine Fever (ASF) was first detected in Lithuania in January 2014, it keeps spreading to other EU Member States, despite intensive monitoring and, in the case of an outbreak, stringent control measures. In the second half of 2018, a new wave of ASF outbreaks has alarmed the European Commission (EC) services and the European pig industry. While new cases are expanding the infected area in Poland, new outbreak areas have occurred to the south in Hungary and Bulgaria. The Western European pork industry was alarmed when ASF was found in a wild boar in the south of Belgium in September 2018 close to the border with France, Luxembourg and Germany. While the risk for spreading to domestic pigs is almost inexistent because the few pig farms in the area were depopulated, Belgian and French veterinary services have put stringent protection measures in place to prevent ASF from spreading to the wild boar population. Hunting programs to reduce wild boar populations are being carried out in many Member States with the goal of lowering the risk of incurring ASF outbreaks. Several MS, such as France, Denmark and Bulgaria, are building fences on borders that are considered risky for ASF.

EC services are trying to preserve the future pork trade in case of further outbreaks by seeking acceptance of regionalization with its Asian trade partners, particularly China and Japan, which, unlike the United States and Canada, does not recognize EU regionalization.

Recent updates on the ASF situation in affected MS are available at

[https://ec.europa.eu/food/animals/health/regulatory\\_committee/presentations\\_en#20190116](https://ec.europa.eu/food/animals/health/regulatory_committee/presentations_en#20190116)

## DISCLAIMER

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This report is the result of active collaboration with the following EU FAS colleagues in the following member states:

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## NOTE

In this report the following HS codes and conversion factors are used:

	HS codes	Conversion factors
<b>Beef</b>	0201, 0202	PW X 1.40 = CW
	021020, 160250	PW X 1.79 = CW
<b>Pork</b>	0203, 021011, 021012, 021019, 160241, 160242, 160249	PW X 1.30 = CW

PW = Product Weight CW = Carcass Weight



## ABBREVIATIONS

EC: European Commission

EU: All twenty-eight Member States of the European Union.

MS: An EU Member State

NMS: The thirteen new MS which joined the EU in May 2004, January 2007 and July 2012

Livestock Related reports from FAS Posts in Europe:

Country	Title	Date
Romania	ASF Hits one of Romania's Largest Pork Production Areas	02/15/19
EU	HQ Beef Third Quarter Fills More Than Half Within One Week	02/13/19
Spain	Spain Gets Green Light to Ship Fresh Pork to China	01/25/19
Poland	Livestock Production under Pressure from ASF and Low Feed Stocks	11/26/18
Poland	Drought Negatively Affected Polish Corn Crop	11/20/18
EU	HQB Q2 Fill Maintains Record Pace as U.S. and EU Renegotiate	11/12/18
Romania	African Swine Fever Continues to Threaten Romanian Hog Farmers	10/18/18
Germany	Drought Related Production Losses Set to Push Imports	09/24/18
Netherlands	The Diverse Effects of the Drought	09/24/18
EU	Oilseeds and Products Update	09/19/18
EU	Livestock Annual Report	09/11/18
Romania	Rising Toll of the African Swine Fever Virus in Romania	08/06/18
Bulgaria	EU first cases peste des petits ruminants (PPR) reported in Bulgaria	07/30/18
Germany	China and Germany Discuss Animal Health Sanitary Issues	07/26/18
EU	New 2018-19 HQB Quota Fill Hits New Record	07/26/18
Romania	Romania Confirms ASF on a Commercial Hog Farm	07/06/18
Romania	ASF Hits a New Romanian County	06/26/18

EU	Comparison of EU Tariff Rate Quotas for High Quality Bovine Meat	06/05/18
Germany	Avian Influenza Outbreak in Northern Germany	03/30/18
EU	EU Livestock Semi-Annual	02/22/18
EU	EC Boasts EU International Animal Welfare Policy Successes	02/09/18
Spain	Exports are the driving forces of the Spanish Animal Production	02/01/18
Romania	New Romanian African Swine Fever Detection	01/30/18
EU	High Quality Beef Quota Fill Under Fierce Import Competition	01/24/18

The GAIN Reports can be downloaded from the following FAS website:

<http://gain.fas.usda.gov/Pages/Default.aspx>

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**Attachments:** No Attachments