

DANISH BACON & MEAT COUNCIL

STATISTICS 2004

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Profit and Loss Account for the financial year 1 October 2003 – 30 September 2004



For the financial year the Production Levy (PL) was:

For the period 12.01.04 - 30.09.04:

Weaners exporters

Weaners 0-15 kg.:

3.05 DKK per head

Weaners 15-50 kg.:

3.70 DKK per head

For the period 05.08.03 - 30.09.04

Pigs under 110 kg. deadweight

5.50 DKK per head

Pigs over 110 kg. deadweight

13.75 DKK per head

Members Company's Fee (DS):

For the period 01.10.03 - 30.09.04

4.50 DKK per head

	DS-share	SAF-share	Total
	DKK M	DKK M	DKK M
Ordinary Income:	100.2	251.8	352.0
Activities			
Marketing and trade activities	-1.1	-79.0	-80.1
Research and development	-14.8	-76.4	-91.2
Production development	-3.7	-36.4	-40.1
Disease prevention	-4.7	-20.8	-25.5
Advise	-29.8	-28.5	-58.3
Control	-0.1	-10.7	-10.8
Other special arrangement	-27.0		-27.0
Management and secretariat	-23.3		-23.3
Total activities:	-104.5	-251.8	-356.3
Result of primary activities before depreciations	-4.3	0.0	-4.3
Depreciations	-4.1		-4.1
Secondary expenses (net)	11.5		11.5
Financial expenses (net)	-0.2		-0.2
Annual results in DANSKE SLAGTERIER	2.9	0.0	2.9

Pig Producers in Denmark



1984

Pigs per supplier	Number of supplier	% of all suppliers	Number of pigs	% of all pigs
1 - 200 head	36,776	70.5	1,892,204	13.8
201 - 500 head	7,628	14.6	2,477,693	18.0
501 - 1,000 head	4,226	8.1	3,038,489	22.1
1,001 - 2,000 head	2,629	5.0	3,585,618	26.1
2,001 - 3,000 head	606	1.2	1,459,098	10.6
3,001 - 4,000 head	186	0.4	630,571	4.6
4,001 - 5,000 head	67	0.1	295,526	2.2
5,001 and more	54	0.1	352,984	2.6
Total	52,172	100	13,732,183	100

1994

Pigs per supplier	Number of supplier	% of all suppliers	Number of pigs	% of all pigs
1 - 200 head	14,335	52.2	857,354	4.5
201 - 500 head	4,244	15.5	1,389,772	7.3
501 - 1,000 head	3,175	11.6	2,313,328	12.2
1,001 - 2,000 head	2,969	10.8	4,147,863	21.8
2,001 - 3,000 head	1,310	4.8	3,210,436	16.9
3,001 - 4,000 head	625	2.3	2,148,807	11.3
4,001 - 5,000 head	318	1.2	1,409,606	7.4
5,001 - 10,000 head	403	1.5	2,674,138	14.1
10,001 and more	67	0.2	874,199	4.6
Total	27,446	100	19,025,503	100

2004

Pigs per supplier	Number of supplier	% of all suppliers	Number of pigs	% of all pigs
1 - 200 head	3,242	29.4	221,251	1.0
201 - 500 head	1,349	12.2	445,277	2.1
501 - 1,000 head	1,187	10.8	869,848	4.0
1,001 - 2,000 head	1,679	15.2	2,467,186	11.4
2,001 - 3,000 head	1,070	9.7	2,632,572	12.2
3,001 - 4,000 head	747	6.8	2,601,134	12.0
4,001 - 5,000 head	537	4.9	2,404,129	11.1
5,001 - 10,000 head	986	8.9	6,690,927	31.0
10,001 and more	225	2.0	3,256,672	15.1
Total	11,022	100	21,588,996	100

The statistical figures are based on reports from individual slaughterhouses for the calendar of the financial year.

Structure of Pig Herd in Denmark



Number of herds by type

	1983	1993	2004
Number of farms	98,680	73,784	45,624
Number of farms with pigs	51,581	26,860	9,994
Of which:			
With pigs and sows	23,595	12,935	4,302
With pigs only	12,117	7,816	4,125
With sows only	12,710	4,877	1,119

Source: Danmarks Statistik

Danmarks Statistik defines a slaughter pig as one of 50 kg and over. Therefore, farms with pigs under 50 kg without sows are not included in above table. This is the reason why the 3 categories of farms do not add up number of farms with pigs.

Pigs and sows by size of herd

Pigs %	Number of farms		Number of pigs		Sows %	Number of farms		Number of pigs	
	2003	2004	2003	2004		2003	2004	2003	2004
1 - 49	15.1	14.1	0.3	0.2	1 - 4	12.3	14.2	0.2	0.1
50 - 199	14.3	13.3	1.4	1.1	5 - 19	13.4	12.9	0.7	0.6
200 - 499	15.1	13.7	4.3	3.4	20 - 49	7.7	6.2	1.3	0.9
500 - 999	16.8	16.2	10.5	8.8	50 - 99	10.7	9.1	4.1	3.2
1,000 - 1,999	19.7	19.9	24.1	21.6	100 - 199	18.7	16.4	14.3	11.3
2,000 - 2,999	9.5	10.5	20.0	19.2	200 - 299	14.6	14.4	18.6	16.6
3,000 - 3,999	4.1	5.2	11.9	13.4	300 - 399	8.5	9.1	15.2	14.6
4,000 - 4,999	2.4	3.1	9.0	10.3	400 - 499	5.6	6.1	12.8	12.7
5,000 -	3.0	4.0	18.5	21.9	500 -	8.5	11.5	32.8	39.9
Total	100	100	100	100	Total	100	100	100	100

Herd structure in the EU

2003

Size of herd	1-9 pigs	10-49 pigs	50-199 pigs	200-399 pigs	400-999 pigs	1000-1999 pigs	2000 pigs and more
Number of farms %							
Germany	31.2	20.6	19.0	9.6	13.5	5.0	1.1
France	60.3	6.3	5.4	6.5	10.6	7.1	3.9
Italy *)	91.7	5.3	1.0	0.3	0.7	0.4	0.5
Netherlands	2.8	1.9	15.0	17.8	27.1	20.6	15.0
Belgium	8.1	7.0	14.0	14.0	29.1	20.9	7.0
Luxembourg	50.0	0.0	50.0	0.0	0.0	0.0	0.0
UK	45.9	17.4	9.2	5.5	9.2	6.4	6.4
Ireland *)	41.5	15.5	6.9	3.6	8.1	6.9	17.4
Denmark	4.5	10.8	14.4	10.8	20.7	19.8	18.9
Greece	85.9	9.9	2.5	0.6	0.6	0.3	0.3
Spain	28.9	23.0	18.5	7.7	11.4	5.9	4.5
Portugal	87.3	9.9	1.8	0.5	0.5	0.0	0.0
Austria	71.9	10.4	9.0	5.1	3.5	0.2	0.0
Sweden	13.5	16.2	18.9	13.5	21.6	16.2	0.0
Finland	2.7	5.4	29.7	29.7	27.0	5.4	0.0
Czek Rep.	79.3	10.8	3.9	1.3	1.7	1.3	1.7
Hungary	90.2	8.9	0.6	0.1	0.0	0.0	0.1
Poland	43.6	43.7	11.0	1.2	0.3	0.1	0.0
Malta	0.0	0.0	100.0	0.0	0.0	0.0	0.0
Cypres	0.0	0.0	50.0	0.0	0.0	50.0	0.0
Slovakia	98.4	1.2	0.2	0.1	0.1	0.0	0.0
Slovenia	85.2	11.3	2.8	0.4	0.2	0.0	0.0
Estonia	90.8	7.9	0.0	0.0	0.0	1.3	0.0
Lituania	95.3	4.4	0.2	0.0	0.1	0.1	0.0
Latvia	92.4	6.6	0.8	0.2	0.0	0.0	0.0

EU 70.1 18.8 5.8 1.7 2.0 1.0 0.6

*) Figures from 2001

2003

Number of pigs %

Germany	0.5	1.9	8.0	10.8	34.4	26.1	18.3
France	0.4	0.4	2.0	5.7	20.9	31.4	39.2
Italy *)	5.0	2.7	2.5	2.6	10.9	16.8	59.5
Netherlands	0.0	0.1	1.8	5.0	16.7	28.7	47.7
Belgium	0.0	0.2	2.3	5.5	26.4	38.2	27.4
Luxembourg	0.4	1.6	10.3	9.7	33.8	44.2	0.0
UK	0.3	0.9	2.1	3.4	13.7	21.0	58.6
Ireland *)	0.1	0.3	0.5	0.8	4.2	7.7	86.4
Denmark	0.0	0.2	1.4	2.6	12.1	24.1	59.5
Greece	6.8	7.5	9.0	5.7	12.4	16.4	42.4
Spain	0.3	1.6	5.1	5.8	18.1	22.1	47.2
Portugal	7.0	7.0	7.3	5.1	13.1	60.5	0.0
Austria	3.5	4.7	20.4	28.9	37.6	3.9	1.1
Sweden	0.1	0.8	4.1	7.1	26.9	61.0	0.0
Finland	0.0	0.5	10.2	22.6	42.2	18.0	6.4
Czech Rep.	2.2	2.6	4.5	4.9	13.5	21.7	50.7
Hungary	22.0	15.1	5.3	1.7	2.3	2.3	51.4
Poland	5.6	32.4	32.8	10.5	6.7	2.8	9.2
Malta	0.0	0.3	7.8	18.7	39.5	33.7	0.0
Cypres	0.0	0.2	0.3	0.6	1.1	8.3	89.4
Slovakia	15.5	2.2	2.1	2.3	8.1	69.8	0.0
Slovenia	18.7	16.7	19.3	8.5	36.9	0.0	0.0
Estonia	4.8	3.2	2.4	2.1	7.7	11.8	68.1
Lituania	39.5	11.0	3.5	1.1	2.9	42.0	0.0
Latvia	25.8	14.2	8.7	4.3	4.5	3.8	38.8

EU 2.7 5.8 8.1 7.0 18.7 22.5 35.1

*) Figures from 2001

Pig Population in Denmark



2004

1000 head	1 Jan.	1 April	1 July	1 Oct.
Gilt in pig	27	25	24	22
Other sows in pig	207	209	206	203
Total sows in pig	691	668	669	653
Boars	898	877	875	856
Sows with piglets	227	235	228	221
Dry sows	40	38	39	41
Culled sows and boars for slaughter	11	10	10	10
Gilts (over 50 kg) for breeding	259	253	259	246
Piglets	2,333	2,458	2,391	2,323
Weaners <50 kg	5,646	5,725	5,756	5,837
Slaughter pigs over 50 kg	3,528	3,498	3,588	3,701
Total pig population	12,969	13,119	13,170	13,257

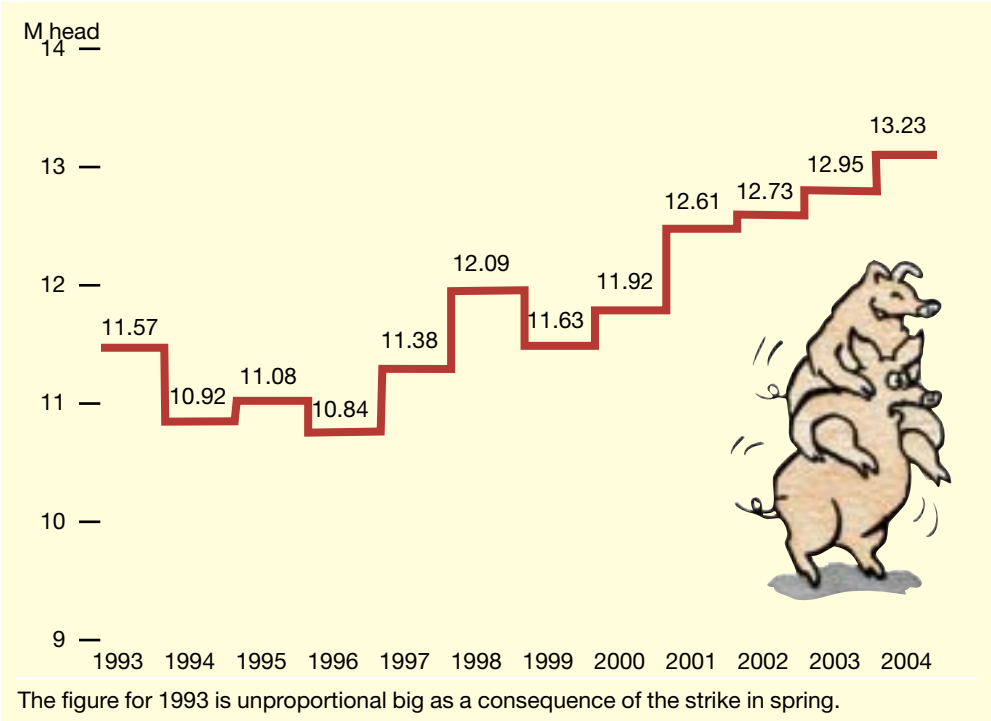
The census is based on a sample of about 3,500 farms.

Percentage distribution in pig population in counties (June-census)

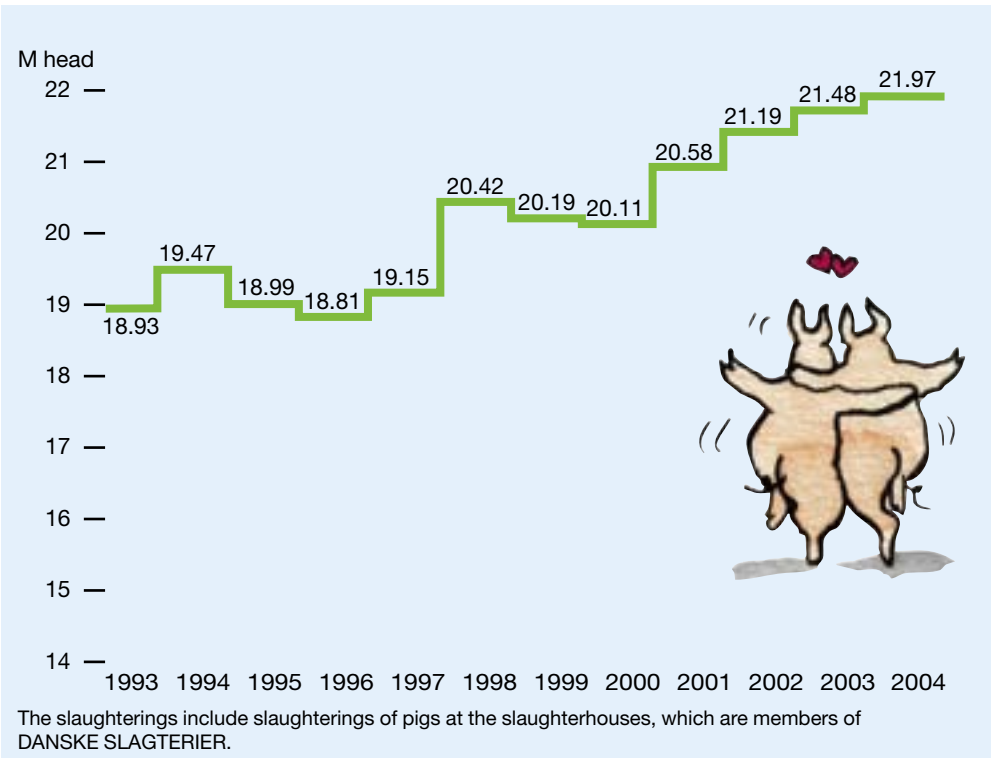
County	1984 %	1994 %	2004 %
Hovedstadsregionen	2.7	1.7	1.5
Vestsjælland	8.0	6.1	5.2
Storstrøm	6.2	5.0	4.8
Bornholm	1.9	1.8	1.8
Fyn	8.9	9.1	9.5
Sønderjylland	8.3	10.7	11.2
Ribe	4.4	4.4	4.6
Vejle	8.5	8.5	8.5
Ringkøbing	12.8	14.2	13.6
Århus	11.5	11.5	11.4
Viborg	11.7	12.0	12.2
Nordjylland	15.1	15.1	15.6
Total Denmark	100	100	100

Source: Danmarks Statistik

Development in the Pig Herd



Development in Slaughterings



Production of Pigs in Denmark



Head	2001	2002	2003	2004
Cooperative slaughterhouses	20,578,377	21,193,104	21,480,341	21,970,272
Private slaughterhouses	930,678	859,318	920,241	940,682
Live export	1,334,143	1,844,949	1,926,776	2,252,938
Total	22,843,198	23,897,371	24,327,358	25,163,892
Average dead weight, kg				
Pigs delivered to DS-slaughterhouses				
Slaughterpigs, average	77.9	78.1	77.7	78.5

Pig Supplies to the individual Slaughterhouses (DS-members)

Slaughterhouses	2003/2004 (53 weeks)		2002/2003 (52 weeks)		Change in % 04/03:02/03
	Pigs	% share	Pigs	% share	
Danish Crown	20,706,641	93.3	20,103,871	93.6	+3.0
TiCan	1,491,704	6.7	1,363,923	6.4	+9.4
Total	22,198,345	100	21,467,794	100	+3.4

Pigs slaughtered in Germany:	2003/2004	2002/2003
Danish Crown:	80,521 pigs	18,833 pigs
TiCan:	24,379 pigs	7,262 pigs



Mergers:

DANISH CROWN:

Danish Crown A.m.b.A. Formed on 1.10.1990 by amalgamation of Wenbo, Tulip and østJYSKE. SYD and Skærbæk merged into Danish Crown on the 1.10.1994. On 5.10.1998 Danish Crown and Vestjyske merged. On 1.10.2001 Danish Crown and Steff-Houlberg merged.

Slaughter facilities: Hjørring, Sæby, Horsens, Vojens, Grindsted, Skive, Holstebro, Herning, Esbjerg, Blans, Skærbæk, Odense, Ringsted and Rønne.

TICAN:

TICAN A.m.b.A Formed on 1.10.1978.

Slaughter facilities: Thisted.

Structure of Slaughterhouses



Number of Slaughterhouses (DS-members)

DS-members:	End year:	1970	1980	1990	2003	2004
Co-operatives		50	18	5	2	2
Private owned		4	2	1	0	0
Total slaughterhouses		54	20	6	2	2
Not DS-members:						
Private ¹⁾				7	10	10

¹⁾Slaughterhouses with slaughterings over 10,000 pigs per year. No figures in 1970 and 1980 available.



Payment to the producer

DKK/kg	Average pig price	Rebates, net ¹⁾	Bonus payment	Value of payment to producer accounts	Production levy	Total
2003	7.65	0.05	0.56	0.09	(0.11)	8.24
2004	8.52	0.05	0.58	0.10	(0.07)	9.18

¹⁾Discounts at transport, payment for delivering room, fees, etc.

Producer pig price 2004

Producer pig prices, Danish Crown (best weight group)			
Period	DKK/kg	Period	DKK/kg
1/1 - 11/1			
12/1 - 15/2	7.10	21/9 - 27/6	8.90
16/2 - 22/2	7.30	28/6 - 18/7	9.10
23/2 - 29/2	7.70	19/7 - 8/8	9.30
1/3 - 7/3	7.90	9/8 - 29/8	9.10
8/3 - 14/3	8.10	30/8 - 19/9	9.30
15/3 - 18/4	8.40	20/9 - 3/10	9.50
19/4 - 2/5	8.60	4/10 - 10/10	9.20
3/5 - 30/5	8.40	11/10 - 17/10	9.00
31/5 - 6/6	8.20	18/10 - 31/10	8.80
7/6 - 20/9	8.40	1/11 - 19/12	9.00
	8.70	20/12 - 31/12	8.60

Producer pig prices for TlCan has in the mentioned periods been the same as for Danish Crown.

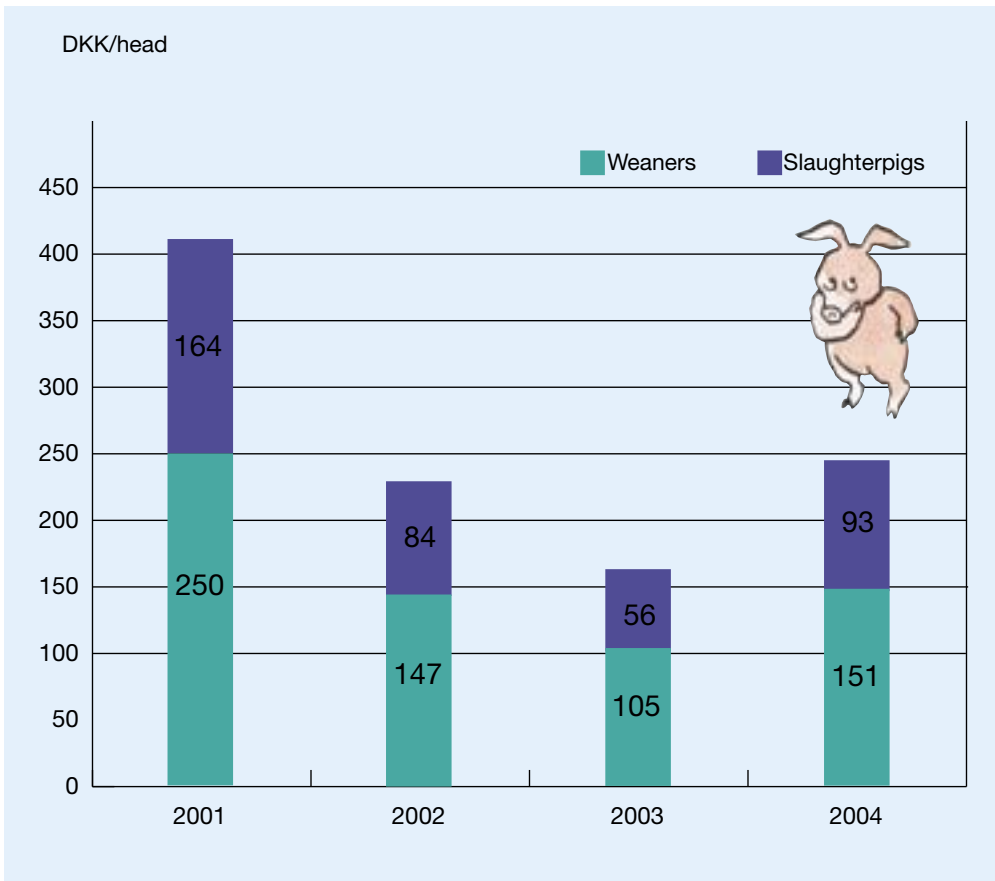
Economy in Pig Production

The ratio between the price for slaughterpigs and compound feeding stuff

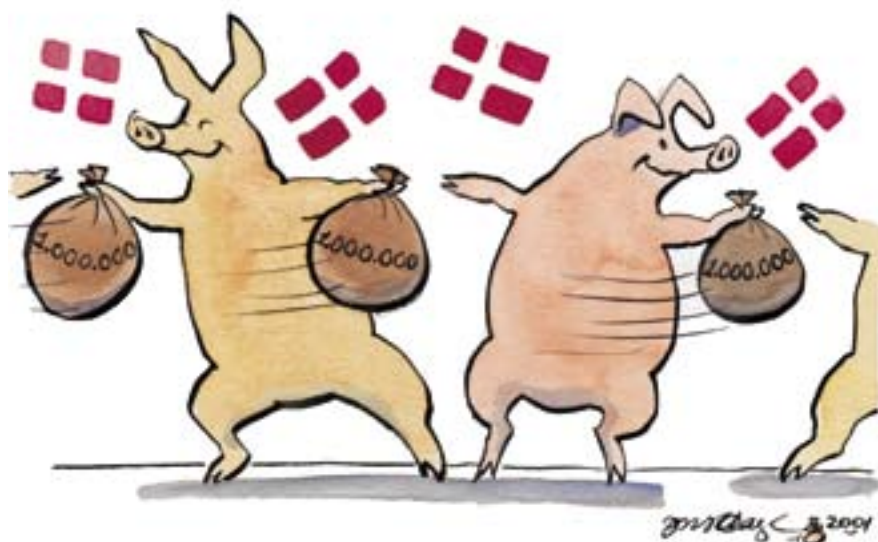
Monthly ratio	2001	2002	2003	2004
January	8.57	7.10	6.60	6.24
February	9.02	7.07	6.58	6.46
March	10.53	7.31	6.54	7.03
April	10.09	7.34	6.56	6.98
May	9.92	6.86	6.47	6.99
June	10.18	6.66	6.17	7.38
July	9.46	6.32	6.24	7.69
August	8.83	6.12	6.26	7.60
September	7.91	6.87	6.76	7.89
October	7.98	6.82	7.00	7.58
November	7.70	6.84	6.83	7.59
December	7.56	6.64	6.33	7.48
Total year	8.90	6.85	6.53	7.23

The price for slaughterpigs: weighted average price including bonus payment etc. (2001: 73 øre/kg, 2002: 60 øre/kg, 2003: 59 øre/kg, 2004 66 øre/kg).
 The price for compound feeding stuff = the feed mills average price delivered to farm ("spot prices").

Gross margin 2001-2004



Social importance of the Pig Industry



Total Danish Pig Production

Year	Tons	% change from year before	Value ex producer DKK M	% change from year before
2002	1,891,800	+3.0	17,401	-17.3
2003	1,898,200	+0.4	15,098	-13.2
2004	1,965,400	+3.5	17,433	+15.5

The production includes approved and discarded animals, slaughtered on the farms, exports of live animals and edible by-products.

Value of the Danish Exports

Year	Total export		Agricultural exports		Animal agricultural exports	
	DKK M	% change from year before	DKK M	% change from year before	DKK M	% change from year before
2002	442,754	+4.2	51,019	-5.8	42,947	-6.8
2003	429,772	-3.0	48,679	-4.6	40,339	-6.1
2004	452,797	+5.5	50,126	+3.0	43,000	+6.6

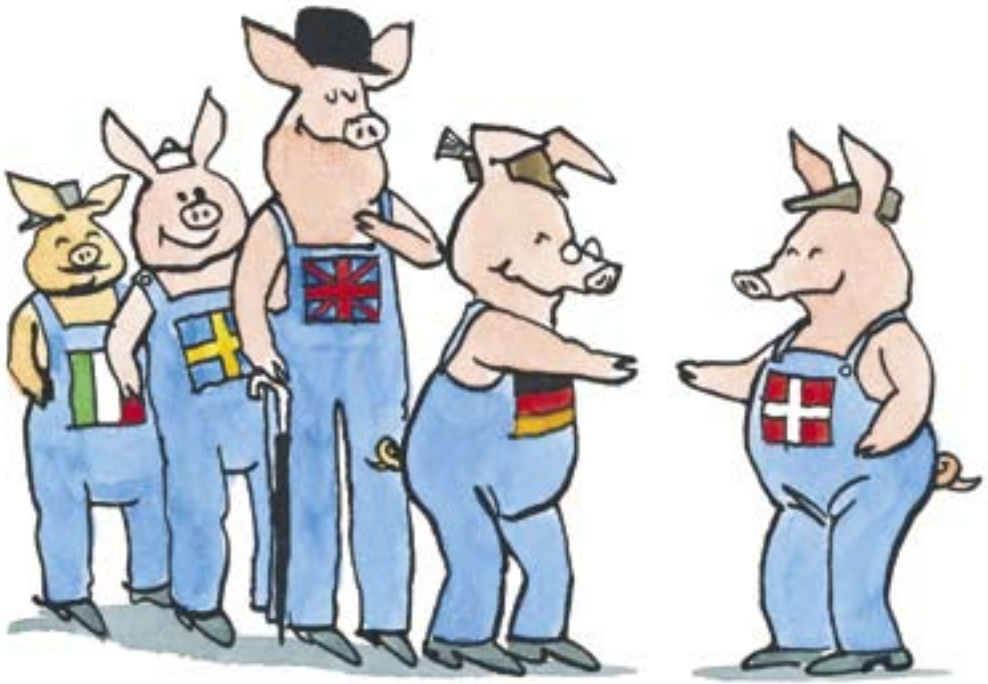
Export of Pigmeat Products

Year	Value DKK M	% change from year before	Share of pork exports, percentage		
			Total exports	Agricultural exports	Animal agricultural exports
2002	25,797	-12.0	6.1	50.2	60.1
2003	23,898	-7.4	5.6	49.1	59.2
2004	25,831	+8.1	5.7	51.5	60.1

All values include payments from the FEOGA.

Source: Danmarks Statistik

Denmark's Import of Pigmeat



2003	Germany	Sweden	UK	Other EU-25	Other countries	Total
Tonnes						
Bacon	4,313	12	2,046	2,191	1	8,563
Carcases, fresh/frozen	1	96	149	381	2	629
Cuts	17,319	1,540	3,105	14,908	1	36,873
Fat	22,804	2,487	91	4,660	-	30,042
By-products	7,370	2,714	3,346	8,789	2,370	24,589
Canned meat	4,114	2,855	183	4,214	1	11,367
Other processed products	4,762	561	8	1,352	9	6,692
Total	60,682	10,265	8,928	36,497	2,381	118,753
% share	51.1	8.6	7.5	30.7	2.0	100

2004	Germany	Sweden	UK	Other EU-25	Other countries	Total
Tonnes						
Bacon	3,660	185	368	4,524	0	8,737
Carcases, fresh/frozen	1,262	32	0	295	22	1,611
Cuts	20,027	5,657	2,180	17,574	405	45,843
Fat	11,284	2,578	670	4,572	-	19,104
By-products	10,163	1,389	2,559	8,232	2,788	25,131
Canned meat	3,810	384	644	2,340	5	7,183
Other processed products	6,284	667	6	1,250	-	8,207
Total	56,489	10,892	6,426	38,789	3,219	115,815
% share	48.8	9.4	5.5	33.5	2.8	100

Denmarks Export of Pigmeat



2004

Country	Tonnes	DKK M	Country	Tonnes	DKK M
Germany	428,331	5,033	Bulgaria	5,156	49
UK	308,052	4,991	Estonia	3,283	32
Japan	291,025	6,065	Greenland	2,657	82
Italy	129,088	1,697	Taiwan	2,654	21
Sweden	85,556	1,278	Norway	2,520	97
Russia	72,774	581	Mexico	2,214	17
USA	63,719	1,459	Canada	2,136	46
France	54,885	792	Arab Emirates	1,931	19
China	48,028	235	Malaysia	1,912	17
Poland	46,124	479	Slovakia	1,627	19
Rep. of Korea	38,360	294	Faeroe Islands	1,215	35
Netherlands	29,992	226	Belarus	1,213	6
Australia	28,102	559	Panama	1,119	21
HongKong	24,484	146	Saudi Arabia	863	10
Hungary	10,299	108	Malta	860	17
Finland	8,635	187	Austria	802	24
Ireland	8,486	175	Slovenia	753	11
Greece	8,389	147	Papua N. Guinea	731	13
Spain	8,341	178	Latvia	717	8
Portugal	7,887	47	Azerbaijan	706	5
Croatia	6,051	83	Algeria	604	9
Czech Rep,	6,048	75	Lebanon	579	11
Belgium	5,895	53	Lithuania	568	5
Philippines	5,315	29	Argentina	528	3
Singapore	5,250	57	Cypres	502	9
			Other countries	9,794	150
			Total	1,776,760	25,710

Denmarks Export of Pigmeat

2003

Tonnes	EU-25	3rd-countries	Total
Live pigs and sows	86,355	158	86,513
Bacon	125,626	1,071	126,697
Carcases, fresh/frozen	69,569	256	69,313
Cuts	653,293	409,684	1,062,977
By-products	136,529	115,787	252,316
Canned meat	32,156	31,495	63,651
Other processed products	18,082	16,859	34,941
Total	1,121,612	575,095	1,696,707
% share	66.1	33.9	100



2004

Tonnes	EU-25	3rd-countries	Total
Live pigs and sows	109,861	292	110,153
Bacon	113,681	1,405	115,086
Carcases, fresh/frozen	72,847	487	73,334
Cuts	673,200	462,779	1,135,979
By-products	139,594	114,652	254,246
Canned meat	31,705	27,537	59,242
Other processed products	13,768	14,953	28,721
Total	1,154,657	622,103	1,776,760
% share	65.0	35.0	100

Denmarks Export of Pigmeat

2003

1000 DKK	EU-25	3rd countries	Total
Live pigs and sows	931,747	16,345	948,092
Bacon	2,948,295	28,295	2,976,590
Carcases, fresh/frozen	571,975	662	572,637
Cuts	8,720,454	7,628,658	16,349,112
By-products	678,070	530,236	1,208,306
Canned meat	754,706	649,821	1,404,527
Other processed products	410,039	274,772	684,811
Total	15,015,287	9,128,788	24,144,075
% share	62.2	37.8	100

Excluding payment from FEOGA: 22.1 DKK M



2004

1000 DKK	EU-25	3rd countries	Total
Live pigs and sows	1,227,286	21,807	1,249,093
Bacon	2,328,675	38,154	2,366,829
Carcases, fresh/frozen	728,486	5,795	734,281
Cuts	9,477,247	8,562,156	18,039,403
By-products	769,805	656,127	1,425,932
Canned meat	725,505	575,857	1,301,362
Other processed products	327,212	265,761	592,973
Total	15,584,216	10,125,658	25,709,874
% share	60.6	39.4	100

Excluding payment from FEOGA: 121.2 DKK M

Denmarks Export of Pigmeat to EU-countries

2003

Tonnes	UK	Italy	Germany	France	Other EU-countries	Total EU-25
Live pigs and sows	106	2,611	81,125	77	2,436	86,355
Bacon	117,149	566	3,259	44	4,608	125,626
Carcases, fresh/frozen	3	323	66,540	1	2,702	69,569
Cuts	157,564	132,106	212,900	44,460	106,263	653,293
By-products	20,749	4,676	28,041	7,021	76,042	136,529
Canned meat	10,711	806	8,502	1,372	10,765	32,156
Other processed products	4,815	63	1,345	4,625	7,234	18,082
Total	311,096	141,151	401,712	57,599	210,054	1,121,612
% share	27.7	12.6	35.8	5.1	18.7	100



2004

Tonnes	UK	Italy	Germany	France	Other EU-countries	Total EU-25
Live pigs and sows	88	1,720	103,146	117	4,790	109,861
Bacon	98,440	1,276	7,913	61	5,991	113,681
Carcases, fresh/frozen	-	-	70,356	18	2,473	72,847
Cuts	173,128	120,799	207,432	44,333	127,508	673,200
By-products	22,588	4,668	30,270	7,188	74,880	139,594
Canned meat	11,133	584	8,187	952	10,849	31,705
Other processed products	2,675	41	1,026	2,216	7,810	13,768
Total	308,052	129,088	428,331	54,885	234,301	1,154,657
% share	26.7	11.2	37.1	4.8	20.3	100

Denmarks Export of Pigmeat to EU-countries

2003						
1000 DKK	UK	Italy	Germany	France	Other EU-countries	Total EU-25
Live pigs and sows	4,744	52,303	834,340	3,054	37,306	931,747
Bacon	2,728,280	14,094	85,163	1,637	119,121	2,948,295
Carcases, fresh/frozen	70	2,607	546,530	5	22,763	571,975
Cuts	2,227,357	1,583,873	2,611,276	559,822	1,738,126	8,720,454
By-products	101,121	75,834	175,982	128,244	196,889	678,070
Canned meat	264,049	12,944	195,259	36,523	245,931	754,706
Other processed products	117,333	1,395	36,315	91,505	163,491	410,039
Total	5,442,954	1,743,049	4,484,865	820,789	2,523,630	15,015,287
% share	36.2	11.6	29.9	5.5	16.8	100



2004						
1000 DKK	UK	Italy	Germany	France	Other EU-countries	Total EU-25
Live pigs and sows	3,400	38,340	1,114,871	3,961	66,714	1,227,286
Bacon	1,984,420	28,437	170,556	1,908	143,354	2,328,675
Carcases, fresh/frozen	-	-	699,861	177	28,448	728,486
Cuts	2,528,304	1,550,215	2,669,709	567,375	2,161,644	9,477,247
By-products	135,214	70,418	187,244	141,262	235,667	769,805
Canned meat	270,929	8,297	164,413	28,363	253,503	725,505
Other processed products	68,444	919	26,708	49,290	181,851	327,212
Total	4,990,709	1,696,627	5,033,361	792,337	3,071,182	15,584,216
% share	32.0	10.9	32.2	5.1	16.8	100

Denmarks Export of Pigmeat to 3rd countries

2003

Tonnes	Japan	USA	Russia	Other 3 ^o countries	Total 3 ^o countries
Live pigs and sows	-	2	24	132	158
Bacon	2	87	16	966	1,071
Carcases, fresh/frozen	2	-	-	42	256
Cuts	235,712	55,153	38,663	80,156	409,684
By-products	1,469	998	32,051	81,269	115,787
Canned meat	5,310	14,857	597	10,731	31,495
Other processed products	1,488	1,326	1,161	12,884	16,859
Total	243,983	72,422	72,513	186,177	575,095
% share	42.4	12.6	12.6	32.4	100



2004

Tonnes	Japan	USA	Russia	Other 3 ^o countries	Total 3 ^o countries
Live pigs and sows	-	-	130	162	292
Bacon	5	149	11	1,240	1,405
Carcases, fresh/frozen	3	-	442	42	487
Cuts	282,077	48,660	43,932	88,110	462,779
By-products	2,599	1,515	27,512	83,025	114,651
Canned meat	4,502	12,326	197	10,512	27,537
Other processed products	1,840	1,070	550	11,493	14,953
Total	291,025	63,719	72,774	194,585	622,103
% share	46.8	10.2	11.7	31.3	100

Denmarks Export of Pigmeat to 3rd countries

2003						
1000 DKK	Japan	USA	Russia	Other 3 ^o countries	Total 3 ^o countries	
Live pigs and sows	-	158	1,786	14,401	16,345	
Bacon	91	2,313	660	25,231	28,295	
Carcases. fresh/frozen	27	-	-	635	662	
Cuts	5,210,200	1,155,036	250,107	1,013,315	7,628,658	
By-products	16,151	11,263	125,824	376,998	530,236	
Canned meat	103,027	308,879	10,729	227,186	649,821	
Other processed products	34,524	32,639	18,757	188,852	274,772	
Total	5.364.020	1.510.287	407.862	1.846.619	9.128.788	
% share	58.8	16.5	4.5	20.2	100	



2004						
1000 DKK	Japan	USA	Russia	Other 3 ^o countries	Total 3 ^o countries	
Live pigs and sows	-	-	6,175	15,632	21,807	
Bacon	221	5,062	417	32,454	38,154	
Carcases, fresh/frozen	41	-	5,331	423	5,795	
Cuts	5,896,373	1,155,489	401,526	1,108,768	8,562,156	
By-products	36,194	16,906	151,775	451,252	656,127	
Canned meat	92,067	255,746	3,958	224,086	575,857	
Other processed products	39,643	25,679	11,908	188,531	265,761	
Total	6,064,538	1,458,882	581,090	2,021,148	10,125,658	
% share	59.9	14.4	5.7	20.0	100	

Trend in Pigmeat Exports

Products

Tonnes	1983	1993	2003	2004
Live pigs and sows	10,674	16,423	86,513	110,153
Sowmeat	24,297	-	-	-
Bacon	188,653	106,959	126,697	115,086
Carcases, fresh/frozen	4,380	32,944	69,613	73,334
Cuts	289,447	661,639	1,062,977	1,134,979
By-products	101,193	102,622	252,316	254,246
Canned meat	152,953	143,508	63,651	59,242
Other processed products	34,679	50,673	34,941	28,721
Total	806,276	1,114,767	1,696,707	1,776,760



1000 DKK	1983	1993	2003	2004
Live pigs and sows	92,665	156,585	948,092	1,249,093
Sowmeat	322,359	-	-	-
Bacon	3,620,915	2,072,139	2,976,590	2,366,829
Carcases, fresh/frozen	52,955	285,361	572,637	734,281
Cuts	5,673,387	11,518,120	16,349,112	18,039,403
By-products	693,818	707,659	1,208,306	1,425,932
Canned meat	3,494,940	2,758,787	1,404,527	1,301,362
Other processed products	824,332	857,684	684,811	592,971
Total	14,775,371	18,356,334	24,144,075	25,709,874
Excl. payment from FEOGA:	1983: 676 DKK M	1993: 850 DKK M	2003: 22.1 DKK M	2004: 121.2 DKK M

Trend in Pigmeat Exports

Main countries

Tonnes	1983	1993	2003	2004
UK	318,995	212,500	311,096	308,052
Germany ¹⁾	155,011	240,664	401,702	428,331
France	78,364	111,978	57,599	54,885
Italy	72,414	97,347	141,151	129,088
Other EU-countries	15,360	7,516	210,064	234,301
EU total ²⁾	640,144	710,005	1,121,612	1,154,657
USA	64,065	92,644	72,422	63,719
Japan	31,854	146,216	243,983	291,025
Other countries	70,213	165,902	258,690	267,359
Total 3rd countries	166,132	404,762	575,095	622,103
Total	806,276	1,114,767	1,696,707	1,776,760

¹⁾The 1983 figures are for former West Germany.
²⁾From 2003 EU-25



1000 DKK	1983	1993	2003	2004
UK	5,428,514	3,499,957	5,442,954	4,990,709
Germany ¹⁾	2,581,838	3,307,541	4,484,865	5,033,361
France	1,362,303	1,588,273	820,789	792,337
Italy	1,252,248	1,296,939	1,743,049	1,696,627
Other EU-countries	214,370	568,941	2,523,630	3,071,182
Total EU ²⁾	10,839,273	10,261,651	15,015,287	15,584,216
USA	1,813,801	1,493,442	1,510,287	1,458,882
Japan	962,949	4,642,844	5,364,020	6,064,538
Other countries	1,159,348	1,958,397	2,254,481	2,602,238
Total 3rd countries	3,936,098	8,094,683	9,128,788	10,125,658
Total	14,775,371	18,356,334	24,144,075	25,709,874

¹⁾The 1983 figures are for former West Germany.
²⁾From 2003 EU-25

Excluding payment from FEOGA: 1983: 676 DKK M 1993: 850 DKK M 2003: 22.1 DKK M 2004: 121.2 DKK M

Export of Live Pigs from Denmark

2003 Head	Weaners 0-50 kg	Slaughterpigs	Breeding pigs	Sows	Total
January	160,100	10,390	2,993	11,282	184,765
February	149,410	7,444	2,010	8,552	167,416
March	140,428	9,716	3,977	11,849	165,970
April	148,973	4,637	3,647	9,817	167,074
May	138,730	5,865	3,799	8,652	157,046
June	138,127	7,757	3,655	9,497	159,036
July	133,501	9,353	2,774	10,945	156,573
August	130,189	8,434	3,201	10,012	151,836
September	131,563	9,304	4,026	12,808	157,701
October	154,029	12,403	4,215	10,319	180,966
November	129,430	7,105	4,196	10,542	151,273
December	111,641	3,503	8,937	3,039	127,120
January - December	1,666,121	95,911	47,430	117,314	1,926,776

2004 Head	Weaners 0-15 kg	Weaners 15-50 kg	Slaughter- pigs	Breeding pigs*)	Sows	Total
January	12,368	100,841	27,937	361	6,762	148,269
February	20,096	156,191	21,544	-	15,236	213,067
March	19,283	106,950	9,070	-	8,113	143,416
April	21,757	133,464	21,535	-	10,333	187,089
May	12,807	130,353	20,639	-	10,104	173,903
June	13,250	154,681	16,416	-	11,259	195,606
July	17,150	135,455	18,006	-	9,601	180,212
August	14,432	127,762	17,216	-	11,347	170,757
September	17,124	122,085	21,550	-	13,151	173,910
October	17,540	193,097	31,858	-	14,193	256,688
November	15,255	143,710	11,293	-	9,007	179,265
December	26,272	207,993	37,575	-	14,659	286,499
January - December	207,334	1,712,582	254,639	361	133,765	2,308,681

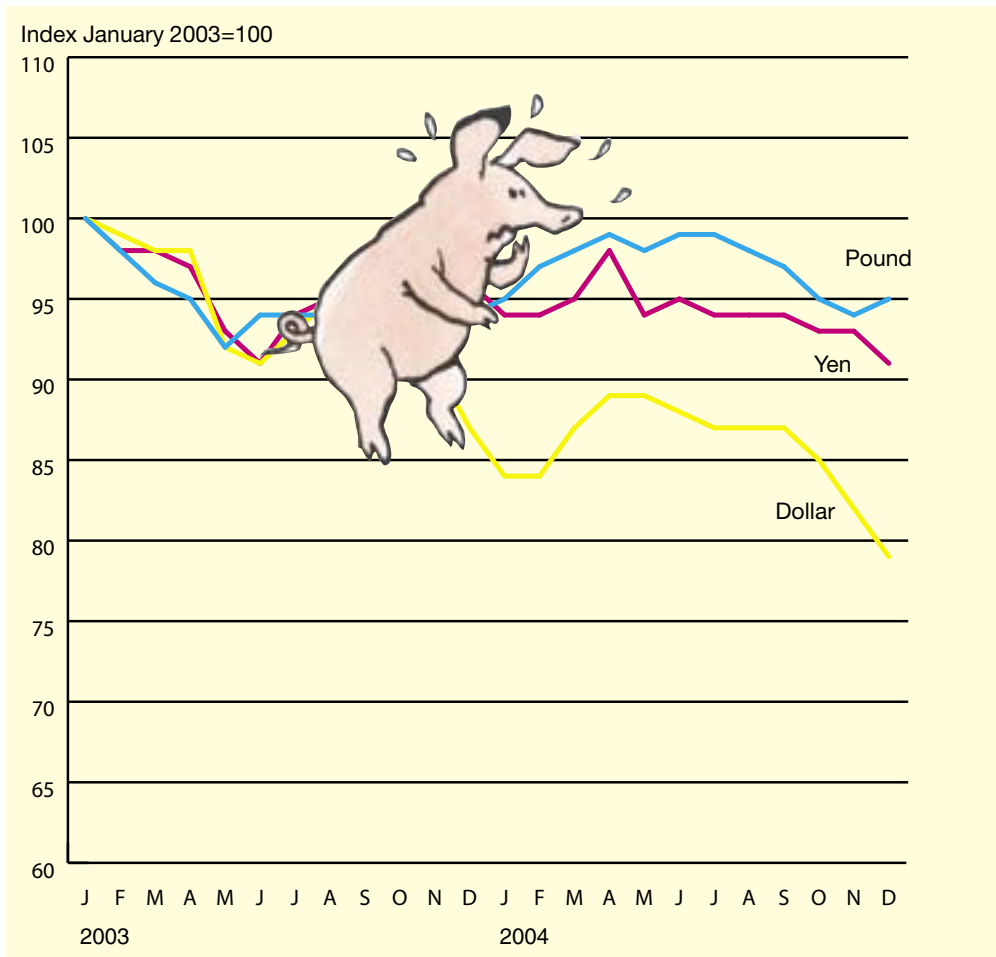
* Breeding pigs are not from 12.01.04 registered alone.

Source: Reports to Production Levy



The Development in Rate of Exchange

DKK per 100 units	Pound		Dollar		Yen	
	2003	2004	2003	2004	2003	2004
January	1131.08	1076.15	699.98	590.55	5.89	5.55
February	1109.81	1100.85	689.86	589.25	5.78	5.53
March	1088.25	1109.85	687.47	607.56	5.80	5.60
April	1077.96	1118.36	684.89	621.43	5.71	5.77
May	1042.06	1107.53	642.66	620.24	5.48	5.53
June	1058.86	1119.18	637.48	612.49	5.38	5.60
July	1061.33	1116.87	653.70	606.26	5.51	5.55
August	1063.03	1110.96	667.44	610.81	5.62	5.53
September	1065.77	1091.77	662.17	608.82	5.76	5.53
October	1065.15	1075.72	635.51	595.65	5.80	5.47
November	1073.59	1063.74	635.69	572.11	5.82	5.46
December	1060.36	1070.97	607.03	555.13	5.63	5.35



USA's and Japan's Trade in Pigmeat



USA's import

Tonnes	Fresh/frozen	Processed products	2004	2003
Canada	320,337	65,944	386,281	425,886
Danmark	46,508	9,834	56,342	61,878
Other countries	9,477	17,350	26,827	25,658
Total	376,322	93,128	469,450	513,421

USA's eksport

Tonnes	Fresh/frozen	Frozen	Processed products	2004	2003
Japan	151,521	141,942	6,177	299,640	259,521
Canada	46,461	13,312	26,078	85,851	67,638
Mexico	124,590	33,410	44,709	202,709	128,367
Rep. of Korea	2,280	18,337	1,697	22,314	27,443
Russia	2,004	19,931	792	22,727	5,498
Taiwan	2,619	28,836	738	32,193	21,781
Hong Kong	2,502	5,513	1,796	9,811	13,600
Other countries	20,547	37,274	14,317	72,138	54,247
I alt	352,524	298,555	96,304	747,383	578,095

The above-mentioned figures are excl. offal and by-products.

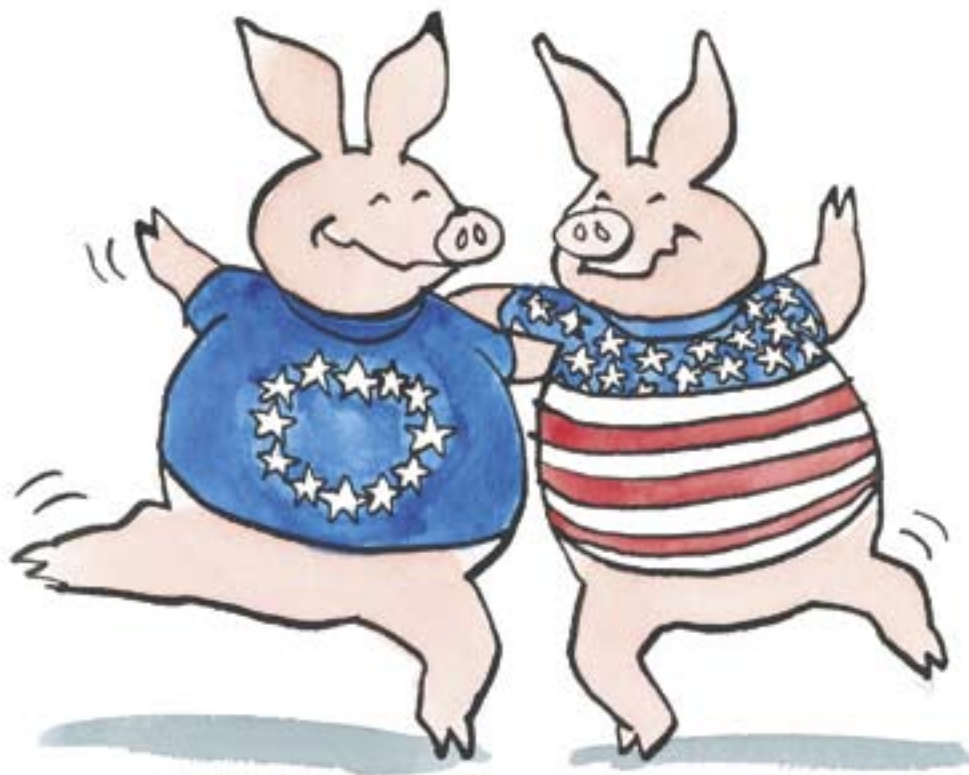
Source: USDA, Washington

Japan's import

Fresh/frozen pigmeat Tonnes	2001	2002	2003	2004
Taiwan	0	0	0	0
Denmark	213,457	239,625	219,909	267,695
USA	244,848	248,867	245,428	256,110
Canada	152,812	178,892	166,349	184,655
Other countries	97,328	109,973	120,660	155,080
Total	708,445	777,357	752,346	863,540

Source: Ministry of Agriculture, Japan

Pig Production in EU and USA



1000 M Head	2003	2004 (provisional)	2005 (forecast)	%-change 2005:2004
Bel/Lux	11.41	11.13	10.85	-2.5
Denmark	22.50	22.76	22.65	-0.5
Germany	45.36	45.98	45.60	-0.8
Spain	38.18	37.58	37.84	0.7
France	26.54	26.28	26.10	-0.7
Greece	2.19	2.23	2.25	1.0
Ireland	2.87	2.65	2.69	1.5
Italy	13.58	13.76	13.69	-0.5
Netherlands	13.89	14.50	14.45	-0.3
Portugal	5.22	5.07	5.10	0.5
UK	9.36	9.06	9.00	-0.7
Finland	2.29	2.35	2.35	0.3
Sweden	3.31	3.22	3.07	-4.7
Austria	5.43	5.34	5.31	-0.6
EU-15	202.10	201.90	200.95	-0.5
EU-25	244.26	240.98	238.60	-1.0
Brazil	32.59	32.00	32.09	0.3
Canada	22.46	22.66	23.67	4.4
USA	100.81	103.70	104.92	1.2

Source: GIRA

The figures include slaughtering of pigs, i.e. imported pigs are included.

World Pigmeat Production and Pig Population in selected countries



	Pigmeat production 1.000 tonnes		Pig Population M head	
	2003	2004 ¹⁾	2003	2004 ¹⁾
UK	687	665	5.3	4.8
Germany	4,057	4,099	26.3	26.5
France	2,356	2,334	15.4	15.3
Italy	1,514	1,554	9.2	9.2
Ireland	239	225	1.8	1.7
Netherlands	1,559	1,599	11.2	10.8
Belgium/Luxembourg	1,043	1,030	6.7	6.4
Denmark	1,821	1,871	12.9	13.0
Spain	3,218	3,180	23.5	24.1
Portugal	300	277	2.3	2.3
Sweden	289	281	2.0	2.0
Austria	473	467	3.3	3.2
Finland	193	197	1.4	1.4
Greece	134	135	0.9	1.0
EU-15 i alt	17,770	17,792	122.80	122.00
The Czech Republic	411	396	3.4	3.3
Hungary	606	568	5.1	4.9
Poland	2,050	2,009	19.0	18.4
Other EU-10 countries	422	409	4.6	4.5
EU-25	21,371	21,295	154.2	152.7
Romania	433	412	5.1	5.1
Bulgaria	142	125	1.1	1.0
Russia	1,706	1,757	17.3	16.5
Ukraine	600	630	9.0	7.5
USA	9,066	9,352	59.6	60.4
Canada	1,882	1,906	14.7	14.6
Mexico	1,035	1,065	15.1	15.3
Brazil	2,380	2,400	35.1	34.6
China (incl. Hong Kong)	45,186	47,000	462.9	466.0
Japan	1,259	1,270	0.7	0.7
Korea, Republic of	753	700	8.1	8.4
Filippines	1,734	1,761	12.2	12.5
Total selected countries	87,547	89,673	795.1	795.3

¹⁾Provisional figures.
Source: GIRA

Supply Balance in Selected Countries (excl. stocks), 1,000 tonnes



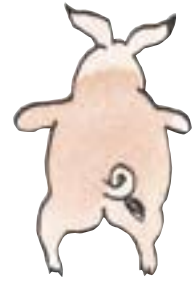
2002	Canada	USA	Mexico	China *)	Brazil	Russia	Japan
Production	1,830	8,937	1,085	43,000	2,356	1,600	1,230
Import	100	479	300	60	0	700	1,125
Export	800	734	60	225	400	0	0
Consumption	1,129	8,676	1,325	42,835	1,956	2,299	2,335
2003	Canada	USA	Mexico	China *)	Brazil	Russia	Japan
Production	1882	9,056	1,100	45,186	2,560	1,710	1,260
Import	91	538	371	149	0	620	1,133
Export	975	779	48	282	603	1	0
Consumption	1004	8,816	1,423	45,053	1,957	2,329	2,373
2004 ¹⁾	Canada	USA	Mexico	China *)	Brazil	Russia	Japan
Production	1,930	9,312	1,150	47,350	2,600	1,725	1,271
Import	105	499	458	71	0	475	1,302
Export	970	988	52	383	621	1	0
Consumption	1,063	8,818	1,556	47,038	1,979	2,199	2,570
2005 ²⁾	Canada	USA	Mexico	China *)	Brazil	Russia	Japan
Production	1,940	9,364	1,175	49,675	2,670	1,760	1,260
Import	100	542	495	100	0	475	1,325
Export	985	1,036	55	450	640	1	0
Consumption	1,065	8,869	1,615	49,325	2,030	2,259	2,799

*) Excl. Hong Kong

¹⁾ Provisional

²⁾ Forecast

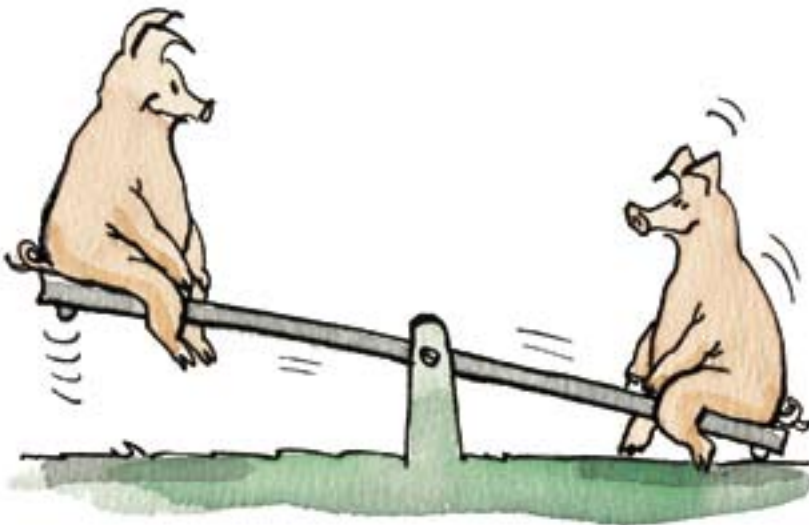
Source: USDA



Supply Balance with Pigmeat

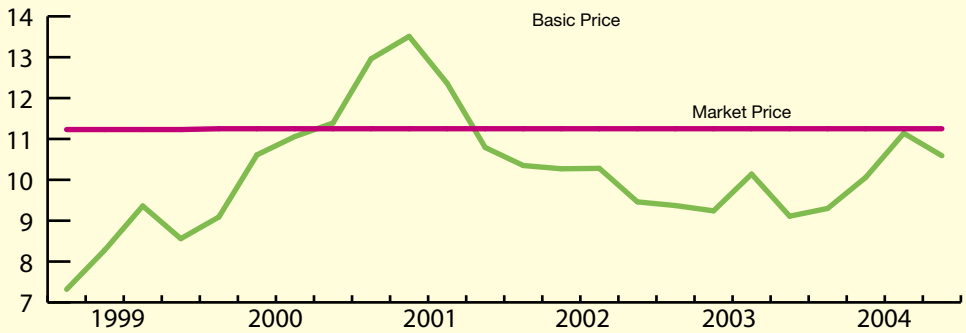
1000 tonnes	2002 EU-15	2003 EU-15	2004 Provisional EU-25	2005 Estimate EU-25
Production	17,795	17,975	21,286	21,174
Import	68	28	14	8
Export	1,198	1,392	1,392	1,250
Stocks	-6	0	0	0
Consumption	16,671	16,611	19,908	19,932
Self sufficiency, %	106.7	108.2	106.9	06.2

Source: Eurostat



Regime for Pigmeat

EU market price for pig carcasses



Private storage aid scheme

1/1 - 10/9 1999 none i 2000 none i 2001 9/12 2002 – 6/2 2003 22/12 – 22/1 2004

The common market price (reference price) is the price for EU's Commercial Grade E (standard quality with between 55 and 60% meat). The basic price is fixed once a year. As the basic price is fixed in EURO, changes in the value of DKK. Will also lead to changes in the basic price in DKK. If the average market price in the EU drops below a certain level, intervention measures can be introduced by the Commission usually as aid to private storage or export refunds.

Export Refunds

Fresh, chilled and frozen cuts

Export refunds DKK/kg	Hams, shoulders/ foreends and loins with bone	Bellies with rind	Deboned hams, shoulders/ foreends and loins excl. Japan products	Bellies without rind and bone excl. Japan products
General:				
1/1 – 26/1	0.00	0.00	0.00	0.00
27/1 – 16/3	2.98	1.89	2.98	1.89
17/3 – end of year	0.00	0.00	0.00	0.00
Candidate countries:				
Total year 2004	0.00	0.00	0.00	0.00

Processed products

Export refunds DKK/kg	Dried sausages	Cooked sausages	Cooked hams	Cooked shoulders	Luncheon meat
General:					
1/1 – 27/6	1.37	1.04	2.04	1.63	0.00
28/6 – end of year	1.60	1.23	2.38	1.86	0.00
Candidate countries:					
Total year 2004	0.00	0.00	0.00	0.00	0.00

EU's Export to 3rd countries



Products

Tonnes	2001	2002	2003	2004 *)
Live pigs	2,535	5,793	2,452	13,080
Pigs, fresh and frozen	51,572	50,218	27,908	60,927
Cuts	646,724	744,806	747,316	864,301
Bacon	16,363	17,200	18,504	20,162
Other processed products	90,477	82,200	76,165	78,373
Canned Meats	72,034	66,170	66,052	68,230
By-products	382,297	552,532	568,675	660,082
Total	1,262,002	1,518,919	1,507,072	1,765,155

Source: EUROSTAT, Luxembourg.

Main countries

Export countries			Import countries		
Tonnes	2003	2004	Tonnes	2003	2004
Belgium/Lux.	65,998	79,002	Russia	287,354	414,219
Denmark	609,777	610,684	Japan	282,320	360,219
Germany	214,558	251,649	USA	97,594	86,999
Greece	2,993	7,608	Hong Kong	120,286	157,392
Spain	75,629	104,048	Rep. of Korea	54,788	110,744
France	158,102	183,835	Poland	44,278	
Ireland	28,775	22,736	Switzerland	19,881	21,537
Italy	47,005	61,460	Czech Republic	43,034	
Netherlands	159,466	168,823	Romania	63,117	124,679
Austria	59,217	61,841	Balticum	35,164	
Portugal	17,030	20,885	Hungary	35,760	
Finland	29,130	22,251	Bulgaria	21,532	33,404
Sweden	19,848	16,784	China	58,599	52,956
UK	19,544	20,571	Australia		29,088
			Others	343,365	320,962
EU-10 **)		132,978	EU-10 ***)		52,956
Total	1,507,072	1,765,155	Total	1,507,072	1,765,155

*) The figures for 2004 cannot be compared to 2003 since the 10 new member states enter into the EU as from 1 May 2004.

***) Import from 1 January 2004 – 30 April 2004.

Source: EUROSTAT, Luxembourg.

Consumer Prices of Pigmeat in Denmark

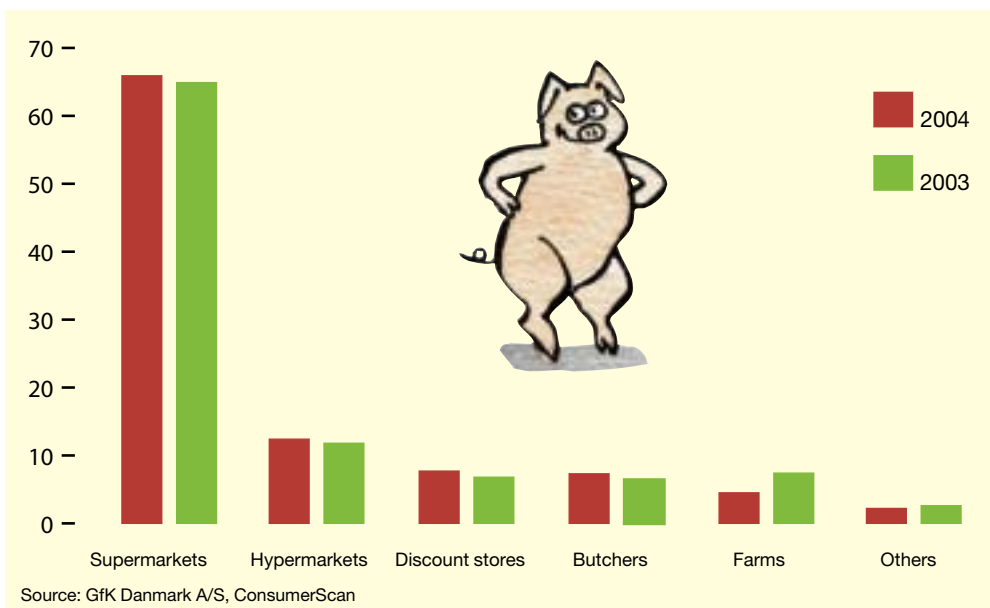


Consumer Prices of Pigmeat in Denmark

DKK/kg	Tender-loin	Cuts from loin	Bellies	Cuts from ham	Minced pigmeat
1. quarter	68.4	50.7	37.5	61.4	35.5
2. quarter	69.1	51.9	44.3	64.2	36.8
3. quarter	68.1	48.6	44.1	65.1	36.7
4. kquarter	70.9	40.0	36.0	64.3	36.9
Total year 2004	69.1	46.2	40.2	63.6	36.5
Total year 2003	67.5	47.6	41.6	62.9	36.0

Source: GfK Danmark A/S, ConsumerScan

Sale of fresh/frozen Meat from different types of Shops (quantity)



Source: GfK Danmark A/S, ConsumerScan

Consumption of meat in the EU



Kg per capita	1995			2004 (provisional)		
	Pigmeat	Beef	Poultry	Pigmeat	Beef	Poultry
Germany	54.9	16.6	13.4	54.5	12.8	17.4
France	35.8	28.1	22.6	35.8	26.8	24.1
Italy	33.1	25.8	18.3	38.7	24.5	18.6
Netherlands	44.2	20.2	20.7	42.0	19.4	22.0
UK	23.1	17.5	25.7	26.1	22.2	29.6
Belgium/Lux.	47.3	21.8	23.0	45.8	19.6	16.0
Ireland	37.8	14.4	30.8	38.4	29.9	31.6
Denmark	64.2	17.6	15.3	56.9	28.5	20.3
Greece	24.8	20.5	17.7	28.1	17.9	22.8
Spain	53.1	12.2	26.6	63.8	16.4	26.2
Portugal	34.3	17.4	23.0	42.1	19.0	29.4
Austria	56.8	19.5	15.3	55.6	18.6	17.8
Sweden	36.0	18.1	7.8	34.7	24.1	130
Finland	32.1	19.0	8.8	33.3	18.8	16.1
Total EU-15	40.5	20.1	20.0	43.4	20.0	22.2

Source: Eurostat

The official figures for meat available for consumption shows the statistic calculated quantity available in the market. However the real consumption of pigmeat in Denmark differs substantially from the statistical quantity available. Different official surveys prove that the real consumption is half the quantity shown in official supply statistics.

Employment and Wages



Number of workers employed at the slaughterhouses

Average per month	2000	2001	2002	2003	2004
January	13,400	13,300	13,900	13,200	13,100
February	13,400	13,400	14,000	13,700	13,000
March	13,500	13,500	14,200	14,000	13,000
April	13,700	13,600	14,400	14,100	13,200
May	13,900	14,100	14,600	14,500	13,400
June	14,200	14,400	14,900	14,500	13,700
July	14,600	14,700	15,100	14,500	13,700
August	14,000	14,400	14,800	14,200	13,400
September	13,500	13,900	14,300	13,600	12,500
October	13,400	13,800	14,000	13,400	12,500
November	13,400	13,800	13,900	13,300	12,400
December	13,700	13,500	13,800	13,300	12,300
Total year	13,700	13,900	14,300	13,900	13,000

Source: Dansk Industri

Average wages for Danish slaughterhouse workers

	DKK/hour ¹⁾	Index1980=100
1997	168.25	248
1998	177.13	262
1999	182.57	271
2000	188.66	279
2001	197.77	293
2002	205.46	304
2003	213.25	316
2004	217.66	322

¹⁾Including holiday pay and sickness benefit.

Source: Dansk Industri

Employer's avance. Percent increase per year (Industry)

	Denmark	Germany	Sweden	UK	Netherlands	USA
1999	4.5	2.7	1.8	4.0	4.0	4.0
2000	3.8	2.7	3.4	4.6	4.7	4.7
2001	4.5	1.5	2.9	4.2	6.0	6.0
2002	4.2	1.7	3.4	3.5	4.1	4.1
2003	4.4	2.4	2.9	3.5	3.4	3.4

Source: Danmarks Statistik

