

BEEF & VEAL MARKET SITUATION



Civil Dialogue Group
1 October 2019

LIVESTOCK

JUNE SURVEY

May/Jun 1000 Hd	TOT LIVESTOCK				%Var 2018 2017	BOVINE < 1 Year				%Var 2018 2017	BOVINE 1-2 Year				%Var 2018 2017	BOVINE > 2 Year				%Var 2018 2017
	2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018	
BE	2 531	2 555	2 454	2 450	-0.2%	744	750	717	710	-0.9%	504	512	500	492	-1.6%	1 283	1 293	1 237	1 247	+0.8%
BG																				
CZ																				
DK	1 568	1 583	1 565	1 560	-0.3%	524	547	527	538	+2.1%	316	307	311	294	-5.5%	728	730	727	729	+0.3%
DE	12 653	12 563	12 366	12 093	-2.2%	3 846	3 805	3 723	3 618	-2.8%	3 002	2 983	2 948	2 848	-3.4%	5 805	5 775	5 694	5 627	-1.2%
EE																				
IE	6 964	7 221	7 364	7 349	-0.2%	2 042	2 126	2 131	2 078	-2.5%	1 705	1 853	1 914	1 919	+0.2%	3 216	3 242	3 319	3 351	+1.0%
EL																				
ES	6 234	6 451	6 588	6 725	+2.1%	2 281	2 413	2 480	2 504	+1.0%	898	896	927	990	+6.8%	3 055	3 141	3 181	3 230	+1.5%
FR	19 463	19 559	19 433	18 963	-2.4%	5 603	5 638	5 542	5 258	-5.1%	3 540	3 561	3 523	3 446	-2.2%	10 319	10 362	10 367	10 258	-1.0%
HR																				
IT	6 146	6 183	6 118	6 170	+0.8%	1 670	1 702	1 723	1 757	+1.9%	1 370	1 502	1 472	1 466	-0.4%	3 107	2 979	2 923	2 948	+0.9%
CY																				
LV																				
LT																				
LU																				
HU																				
MT																				
NL	4 134	4 245	4 096	3 918	-4.4%	1 624	1 692	1 602	1 569	-2.1%	672	630	600	523	-12.9%	1 838	1 923	1 893	1 825	-3.6%
AT	1 950	1 933	1 938	1 907	-1.6%	622	605	620	606	-2.3%	437	441	431	433	+0.4%	891	887	888	869	-2.2%
PL	5 961	5 939	6 143	6 201	+0.9%	1 669	1 728	1 721	1 686	-2.0%	1 529	1 576	1 701	1 734	+1.9%	2 763	2 635	2 721	2 781	+2.2%
PT		1 664	1 722	1 722	+0.0%		521	537	529	-1.5%		264	281	274	-2.6%		879	904	919	+1.7%
RO	2 078	2 081	2 012	2 002	-0.5%	477	481	454	444	-2.2%	235	240	229	236	+2.8%	1 366	1 360	1 329	1 322	-0.5%
SI																				
SK																				
FI																				
SE	1 476	1 489	1 501	1 507	+0.4%	466	475	472	475	+0.6%	372	375	385	381	-1.1%	638	639	644	651	+1.1%
UK	9 919	10 033	10 004	9 891	-1.1%	2 912	2 989	2 940	2 908	-1.1%	2 380	2 474	2 516	2 479	-1.5%	4 626	4 569	4 548	4 504	-1.0%
EU	81 076	83 499	83 305	82 457	-1.0%	24 481	25 473	25 190	24 681	-2.0%	16 959	17 613	17 740	17 514	-1.3%	39 635	40 414	40 375	40 263	-0.3%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2017 AND 2018

1 October 2019

LIVESTOCK

EU EVOLUTION TOTAL BOVINE

JUNE SURVEY

May/Jun 1000 Hd	TOTAL COWS				%Var 2018 2017	DAIRY COWS				%Var 2018 2017	OTHER COWS				%Var 2018 2017
	2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018	
BE	987	1 005	970	968	-0.3%	524	536	521	532	+2.1%	463	469	449	435	-3.0%
BG															
CZ															
DK	661	669	665	667	+0.3%	561	572	570	575	+0.9%	99	97	95	91	-4.2%
DE	4 969	4 957	4 885	4 830	-1.1%	4 287	4 272	4 214	4 167	-1.1%	682	685	670	663	-1.1%
EE															
IE	2 372	2 502	2 514	2 529	+0.6%	1 296	1 398	1 433	1 481	+3.4%	1 076	1 104	1 081	1 048	-3.1%
EL															
ES	2 678	2 801	2 832	2 865	+1.2%	853	827	825	825	+0.0%	1 825	1 973	2 007	2 040	+1.7%
FR	7 809	7 838	7 811	7 684	-1.6%	3 606	3 576	3 552	3 509	-1.2%	4 203	4 263	4 259	4 175	-2.0%
HR															
IT	2 375	2 245	2 187	2 192	+0.2%	2 061	1 948	1 907	1 904	-0.1%	314	297	280	288	+2.9%
CY															
LV															
LT															
LU															
HU															
MT															
NL	1 702	1 811	1 753	1 693	-3.4%	1 622	1 743	1 694	1 630	-3.8%	80	68	59	63	+7.0%
AT	762	755	755	740	-2.0%	540	536	540	538	-0.4%	222	218	215	202	-5.8%
PL	2 444	2 332	2 374	2 429	+2.3%	2 279	2 146	2 154	2 233	+3.7%	165	186	220	196	-10.9%
PT		736	747	745	-0.2%		246	244	244	+0.2%		490	504	501	-0.5%
RO	1 233	1 228	1 199	1 197	-0.2%	1 216	1 216	1 184	1 184	+0.1%	17	12	15	12	-19.5%
SI															
SK															
FI															
SE	523	524	530	534	+0.8%	338	331	322	319	-0.8%	184	194	208	214	+3.2%
UK	3 472	3 493	3 481	3 441	-1.1%	1 895	1 897	1 891	1 883	-0.4%	1 576	1 596	1 589	1 558	-2.0%
EU	31 987	32 895	32 702	32 514	-0.6%	21 078	21 243	21 050	21 025	-0.1%	10 907	11 652	11 651	11 488	-1.4%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2017 AND 2018

1 October 2019

LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION TOTAL BOVINE

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2018 2017	BOVINE < 1 Year				%Var 2018 2017	BOVINE 1-2 Year				%Var 2018 2017	BOVINE > 2 Year				%Var 2018 2017
	2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018	
BE	2 503	2 501	2 386	2 398	+0.5%	749	748	700	724	+3.5%	493	492	484	464	-4.1%	1 261	1 261	1 202	1 210	+0.6%
BG	561	570	553	542	-1.9%	109	120	110	108	-1.4%	64	63	57	59	+3.5%	388	387	386	375	-2.9%
CZ	1 366	1 340	1 366	1 365	-0.1%	403	397	407	404	-0.8%	309	295	299	304	+1.7%	654	648	660	657	-0.5%
DK	1 566	1 554	1 558	1 530	-1.8%	538	540	541	534	-1.3%	302	298	294	284	-3.4%	726	715	723	712	-1.5%
DE	12 635	12 467	12 281	11 949	-2.7%	3 836	3 795	3 704	3 584	-3.3%	2 993	2 960	2 904	2 829	-2.6%	5 806	5 712	5 673	5 536	-2.4%
EE	256	248	251	255	+1.7%	70	68	70	70	+0.3%	53	50	49	49	-0.8%	133	130	132	136	+3.3%
IE	6 422	6 613	6 674	6 593	-1.2%	2 026	2 077	2 087	2 000	-4.2%	1 660	1 778	1 792	1 790	-0.1%	2 737	2 759	2 795	2 804	+0.3%
EL	582	554	556	555	-0.2%	154	145	151	150	-0.7%	103	102	101	102	+1.0%	325	306	303	303	idem
ES	6 183	6 318	6 466	6 511	+0.7%	2 325	2 404	2 492	2 494	+0.1%	786	804	822	847	+3.0%	3 072	3 110	3 151	3 170	+0.6%
FR	19 406	19 004	18 975	18 563	-2.2%	5 618	5 138	5 266	5 232	-0.7%	3 461	3 493	3 381	3 180	-5.9%	10 327	10 372	10 328	10 152	-1.7%
HR	441	444	451	414	-8.2%	148	154	156	153	-1.9%	88	89	100	96	-4.0%	205	201	195	165	-15.4%
IT	6 156	6 315	6 350	6 311	-0.6%	1 678	1 745	1 738	1 703	-2.1%	1 379	1 448	1 501	1 538	+2.5%	3 099	3 122	3 111	3 071	-1.3%
CY	59	63	67	71	+5.7%	21	22	23	24	+1.5%	9	10	11	12	+14.0%	29	32	33	35	+6.0%
LV	419	412	406	395	-2.6%	114	113	108	106	-2.1%	76	73	70	65	-6.9%	229	227	228	225	-1.5%
LT	723	695	677	654	-3.5%	185	179	180	173	-4.1%	152	143	135	133	-1.6%	385	373	362	348	-3.9%
LU	201	202	198	194	-1.9%	54	54	50	50	-0.6%	45	44	44	42	-6.1%	102	104	103	103	-0.7%
HU	821	852	870	885	+1.7%	220	239	243	251	+3.3%	180	176	179	182	+1.7%	421	438	448	451	+0.7%
MT	15	14	14	14	-0.4%	4	4	4	4	+1.7%	4	3	3	3	-5.8%	7	7	7	7	+0.7%
NL	4 315	4 294	4 030	3 690	-8.4%	1 707	1 666	1 594	1 510	-5.3%	660	644	575	465	-19.1%	1 948	1 985	1 860	1 715	-7.8%
AT	1 958	1 954	1 943	1 913	-1.6%	624	632	624	618	-0.9%	439	432	439	428	-2.3%	894	890	881	866	-1.7%
PL	5 763	5 970	6 036	6 183	+2.4%	1 617	1 718	1 713	1 709	-0.2%	1 532	1 637	1 669	1 732	+3.8%	2 614	2 615	2 654	2 742	+3.3%
PT	1 606	1 635	1 670	1 632	-2.3%	510	499	515	497	-3.4%	240	267	256	236	-7.7%	856	869	900	899	-0.0%
RO	2 092	2 050	2 011	2 002	-0.5%	475	447	432	431	-0.3%	261	251	248	247	-0.5%	1 357	1 352	1 330	1 324	-0.5%
SI	484	489	480	477	-0.6%	153	155	153	153	-0.1%	129	131	128	128	-0.6%	202	203	198	196	-1.0%
SK	457	446	440	440	+0.1%	130	130	125	123	-1.1%	91	84	84	83	-1.4%	236	231	231	234	+1.2%
FI	903	887	875	859	-1.7%	308	302	299	296	-1.0%	221	218	213	210	-1.6%	374	367	363	354	-2.4%
SE	1 428	1 436	1 449	1 435	-0.9%	467	468	474	468	-1.3%	342	344	342	343	+0.3%	619	624	633	625	-1.2%
UK	9 816	9 806	9 787	9 676	-1.1%	2 967	2 952	2 956	2 925	-1.0%	2 372	2 435	2 413	2 379	-1.4%	4 477	4 419	4 417	4 373	-1.0%
EU	89 138	89 134	88 819	87 508	-1.5%	27 209	26 911	26 916	26 494	-1.6%	18 445	18 764	18 594	18 229	-2.0%	43 484	43 458	43 306	42 786	-1.2%

Source : EStat Newcrons

EU %Var is calculated considering only countries available in 2017 AND 2018

1 October 2019

LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION

COWS

Dec	TOTAL COWS				%Var 2018 2017	DAIRY COWS				%Var 2018 2017	OTHER COWS				%Var 2018 2017
1000 Hd	2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018	
BE	974	988	938	942	+0.4%	529	531	519	529	+1.9%	445	457	419	412	-1.6%
BG	359	365	357	351	-1.7%	283	279	261	245	-6.2%	76	86	97	107	+10.5%
CZ	566	561	571	570	-0.2%	369	367	365	359	-1.9%	197	193	206	212	+2.8%
DK	664	657	664	655	-1.4%	570	565	575	570	-0.9%	94	92	89	85	-4.5%
DE	4 966	4 887	4 859	4 751	-2.2%	4 285	4 218	4 199	4 101	-2.3%	681	670	660	650	-1.5%
EE	116	114	115	119	+3.6%	91	86	86	85	-1.4%	25	28	29	34	+18.8%
IE	2 293	2 337	2 362	2 351	-0.4%	1 240	1 295	1 343	1 369	+1.9%	1 053	1 042	1 018	982	-3.5%
EL	274	241	262	255	-2.7%	111	106	97	102	+5.2%	163	135	165	154	-6.7%
ES	2 763	2 785	2 822	2 819	-0.1%	844	834	823	817	-0.8%	1 919	1 950	1 998	2 002	+0.2%
FR	7 872	7 856	7 750	7 642	-1.4%	3 661	3 630	3 595	3 550	-1.2%	4 211	4 225	4 156	4 092	-1.5%
HR	172	167	161	146	-9.3%	152	147	139	136	-2.2%	20	20	22	10	-54.5%
IT	2 386	2 365	2 338	2 263	-3.2%	2 057	2 060	2 040	1 939	-4.9%	329	305	298	324	+8.7%
CY	26	29	30	32	+5.4%	26	28	30	31	+3.0%	0	0	0	0	-61.5%
LV	201	199	199	196	-1.4%	162	154	150	144	-3.9%	39	45	49	52	+6.2%
LT	343	333	323	312	-3.3%	301	286	273	256	-6.1%	43	47	50	56	+12.0%
LU	77	80	78	78	-0.0%	49	52	52	53	+1.7%	28	28	26	25	-3.5%
HU	368	383	395	403	+2.0%	250	244	244	239	-2.0%	117	138	151	164	+8.6%
MT	7	7	6	6	+1.4%	6	7	6	6	+1.5%	0	0	0	0	idem
NL	1 802	1 864	1 723	1 594	-7.5%	1 717	1 794	1 665	1 552	-6.8%	85	70	58	42	-27.6%
AT	758	757	750	733	-2.3%	534	540	543	533	-1.9%	224	217	207	200	-3.2%
PL	2 303	2 304	2 341	2 417	+3.3%	2 134	2 130	2 153	2 214	+2.8%	169	174	188	203	+8.3%
PT	719	724	728	723	-0.7%	243	239	239	235	-1.3%	476	485	490	487	-0.5%
RO	1 207	1 204	1 187	1 181	-0.5%	1 191	1 193	1 175	1 169	-0.5%	17	12	12	12	+1.7%
SI	170	171	169	166	-1.5%	113	108	109	102	-6.7%	57	64	60	65	+8.0%
SK	200	194	195	195	+0.3%	139	133	130	128	-1.4%	60	62	65	67	+3.6%
FI	339	333	329	322	-2.0%	282	275	271	264	-2.6%	57	57	58	58	+0.7%
SE	513	514	522	514	-1.6%	337	326	323	313	-3.2%	176	188	199	201	+0.9%
UK	3 469	3 451	3 443	3 405	-1.1%	1 918	1 898	1 904	1 895	-0.5%	1 551	1 554	1 540	1 510	-1.9%
EU	35 908	35 868	35 618	35 143	-1.3%	23 594	23 525	23 311	22 937	-1.6%	12 313	12 342	12 308	12 207	-0.8%

Source : EStat Newcronos

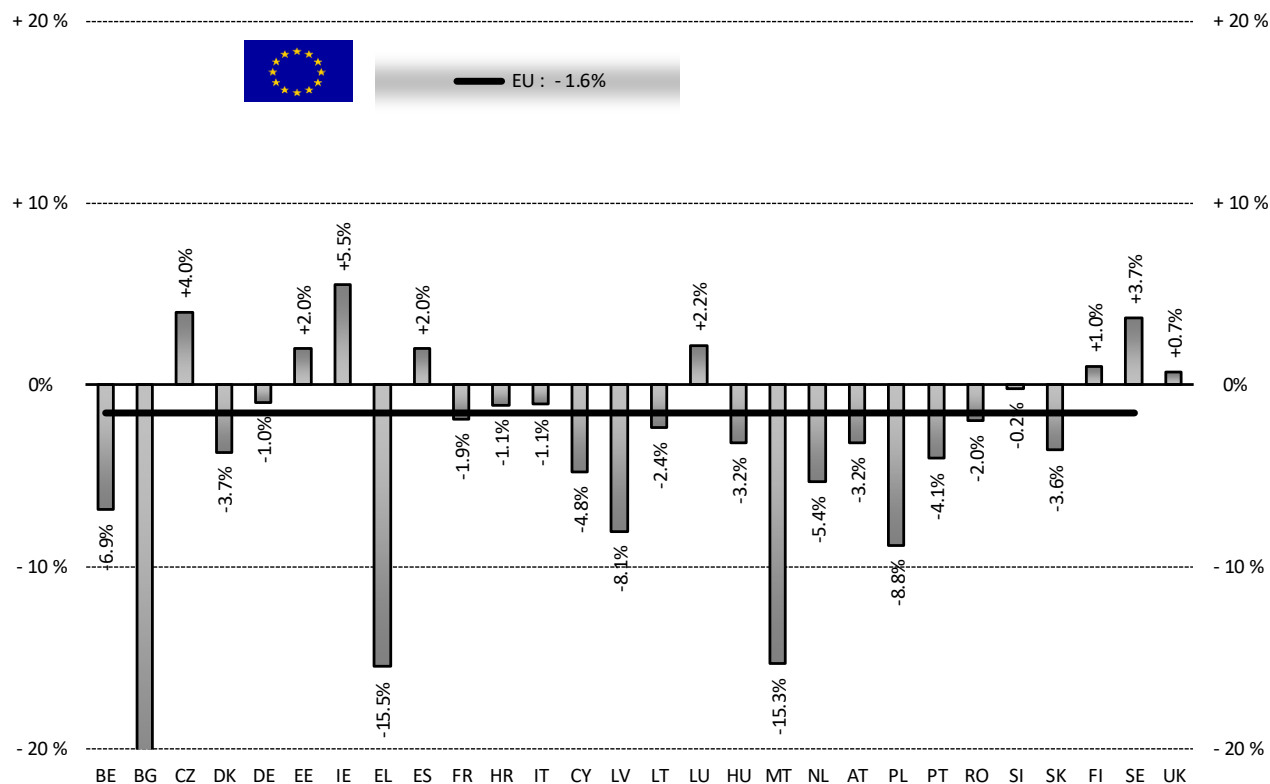
EU %Var is calculated considering only countries available in 2017 AND 2018

1 October 2019

PRODUCTION

% EVOLUTION HEADS

HEADS	Jan-Jun 19/18	
	EU15	EU28
Bull	+0.5%	-1.0%
Bullock	-1.9%	-1.8%
Cow	-5.0%	-5.4%
Heifer	+3.6%	+3.1%
Calve	+1.2%	+0.8%
Young cattle	-5.4%	-5.3%
Meat of bovine animals	-1.0%	-1.6%



Estimates for last month of period :

Source : EStat - Newcronos

1 October 2019

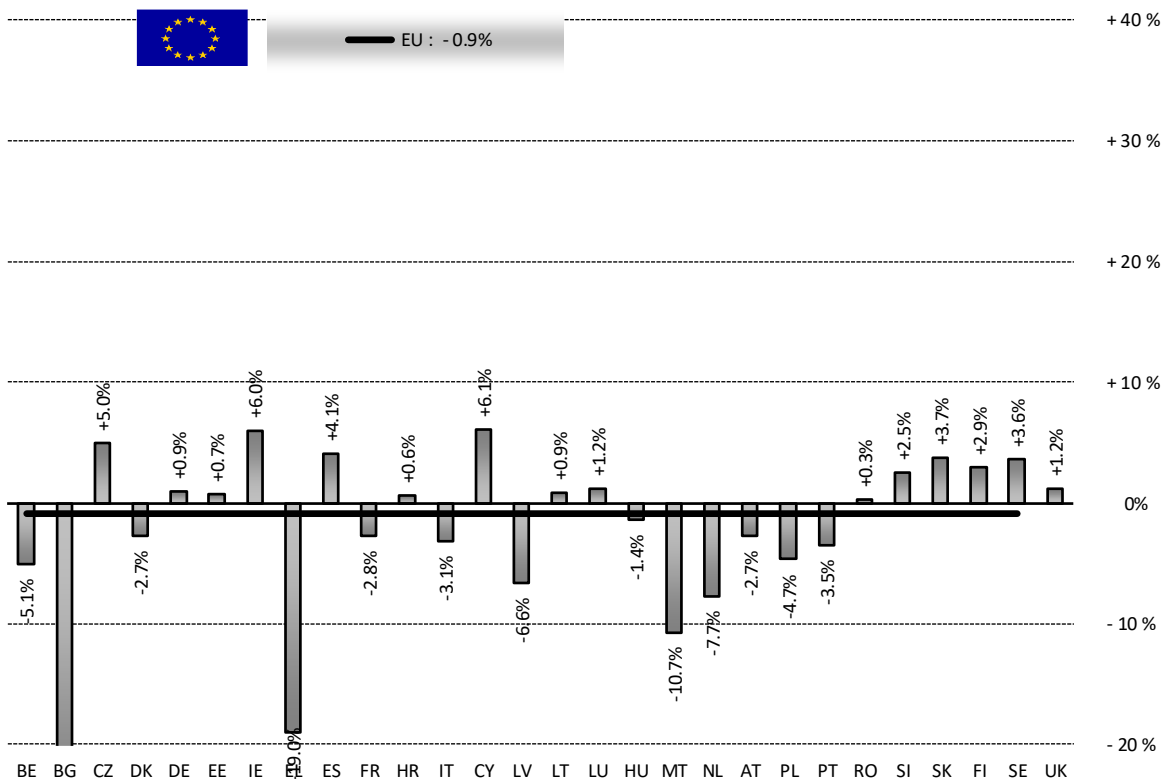
PRODUCTION

% EVOLUTION TONNES

TONNES	Jan-Jun 19/18	
	EU15	EU28
Bull	+0.9%	+0.1%
Bullock	-1.1%	-0.5%
Cow	-3.6%	-3.9%
Heifer	+2.9%	+2.8%
Calve	+0.6%	+0.5%
Young cattle	-5.6%	-5.3%
Meat of bovine animals	-0.6%	-0.9%



EU : -0.9%



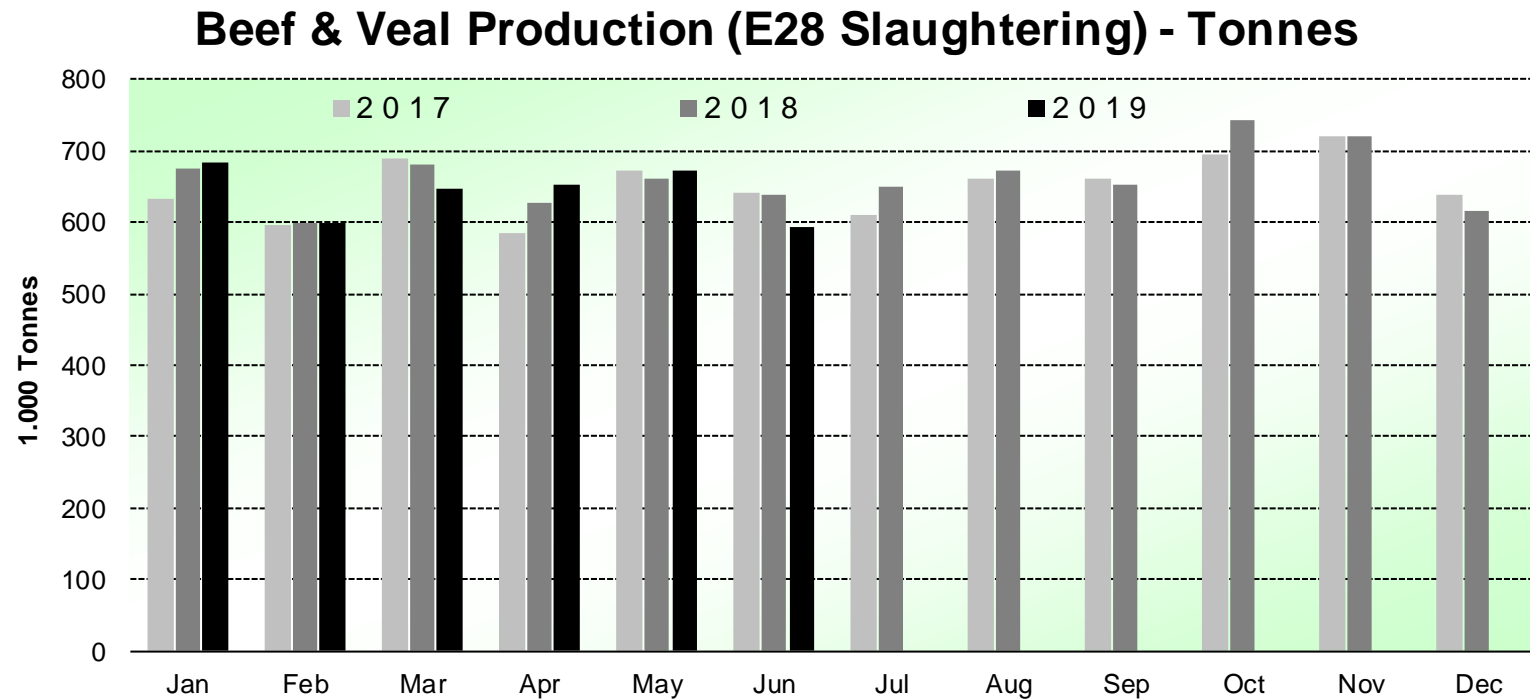
Estimates for last month of period :

Source : EStat - Newcronos

1 October 2019

PRODUCTION

HISTORIC
TONNES



Source : EStat-Newcronos

1 October 2019

PRICES CARCASSES

Dashboard

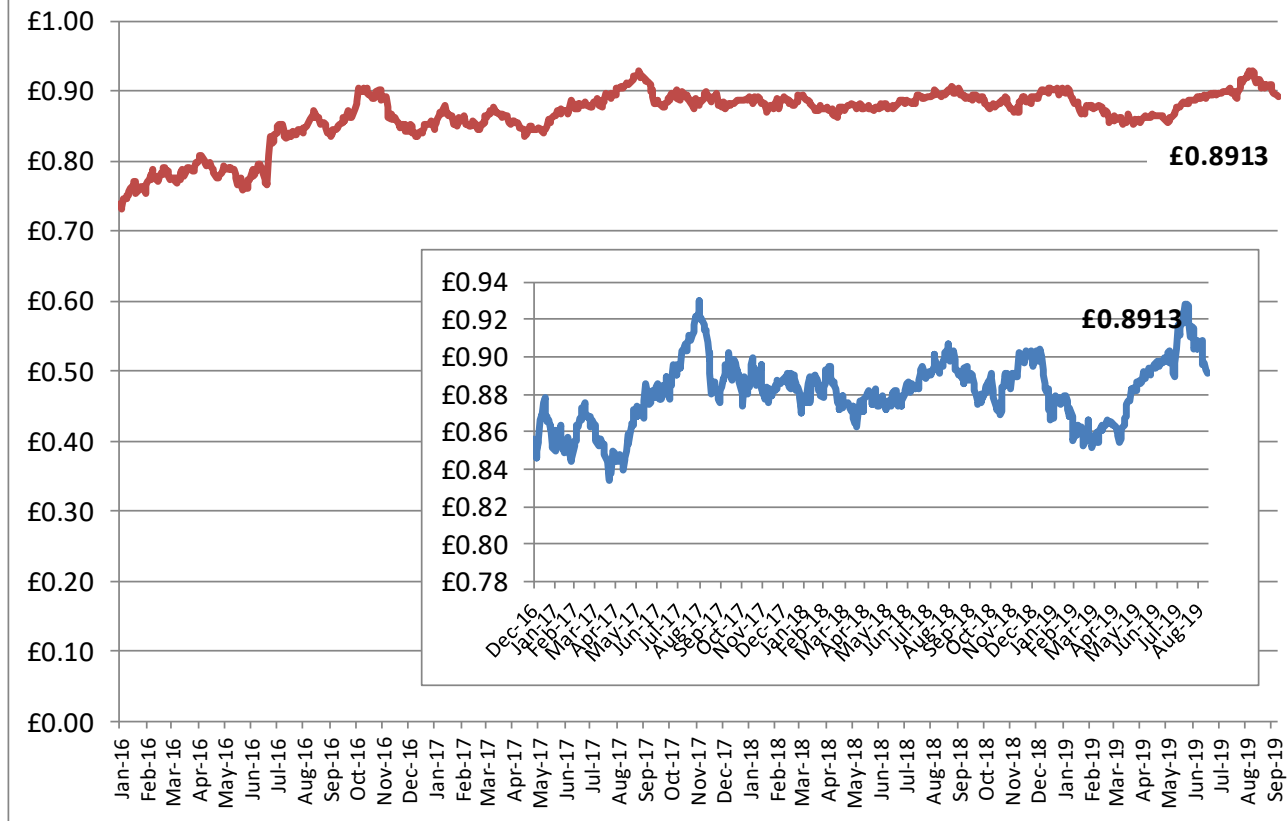
EU Prices week		36	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	354.1	€/100 kg	- 0.3%	+ 0.8%	- 4.6%
	Young Bovines (Z)	356.1		- 0.5%	- 1.0%	- 0.5%
	Young Bulls (A)	356.7		- 0.4%	+ 1.1%	- 3.3%
	Steers (C)	359.3		- 0.1%	+ 0.8%	- 10.1%
	Cows (D)	285.4		- 0.3%	+ 0.3%	- 2.0%
	Heifers (E)	364.9		- 0.3%	+ 0.2%	- 5.1%
Live Animals	Male Calves Dairy Type	73.25	€/head	- 5.7%	- 32.8%	- 25.6%
	Male Calves Beef Type	187.1		- 3.4%	- 16.8%	- 3.4%
	Young Store Cattle	2.24	€/kg	- 1.2%	- 6.4%	- 3.6%
	Yearling Male Store Cattle	2.17		- 1.0%	- 3.7%	- 4.2%
	Yearling Female Store Cattle	2.25		- 1.1%	- 2.2%	- 1.6%
	Calves slaughtered <8M	467.1	€/100	+ 2.7%	- 1.2%	- 4.9%

Sources : MSs notifications (Regulation (EU) 1182/2017 and 1184/2017)

1 October 2019

EXCHANGE RATE INDEX / Euro

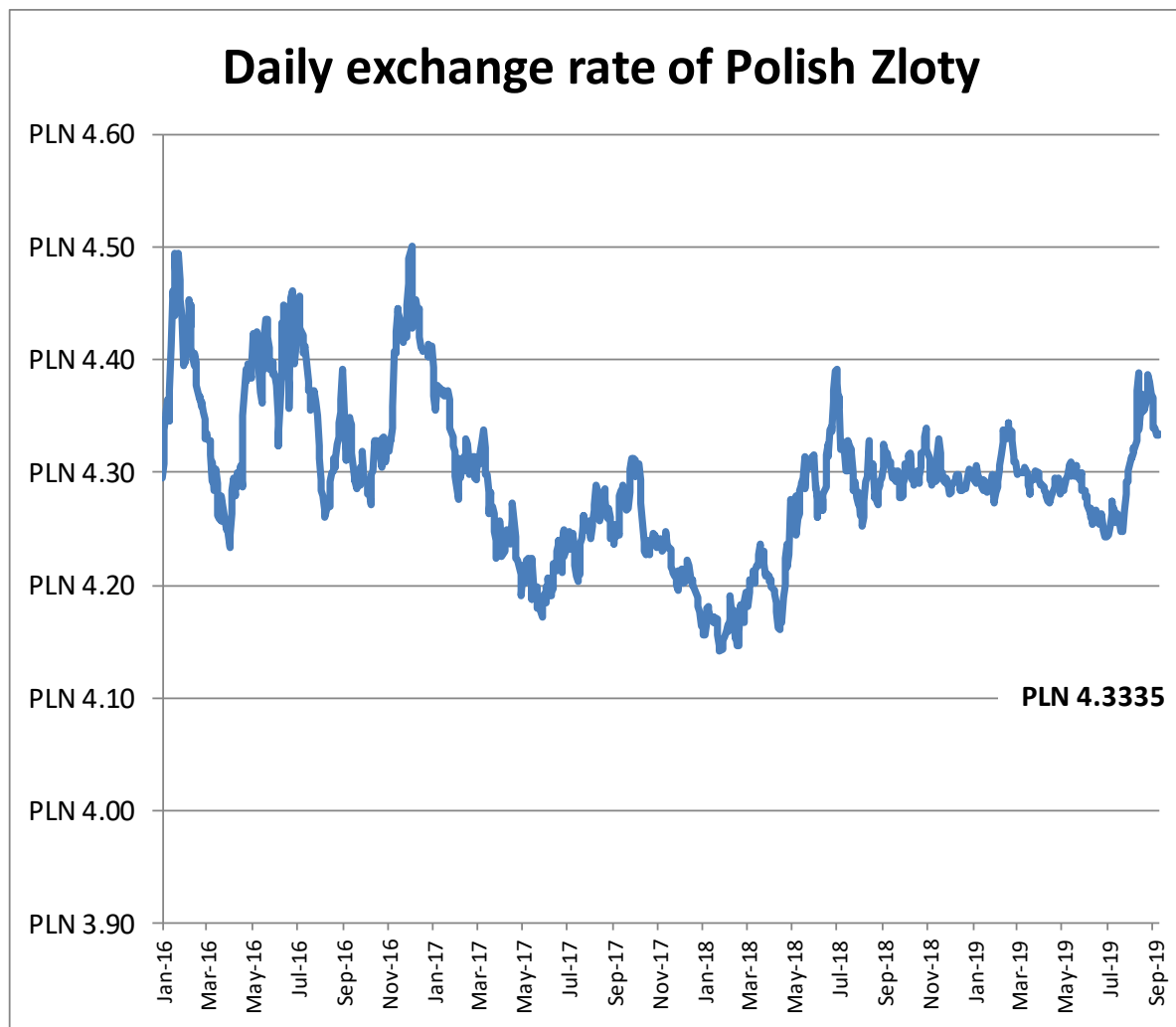
Daily exchange rate of Pound Sterling compared to the Euro



Source : ECB

1 October 2019

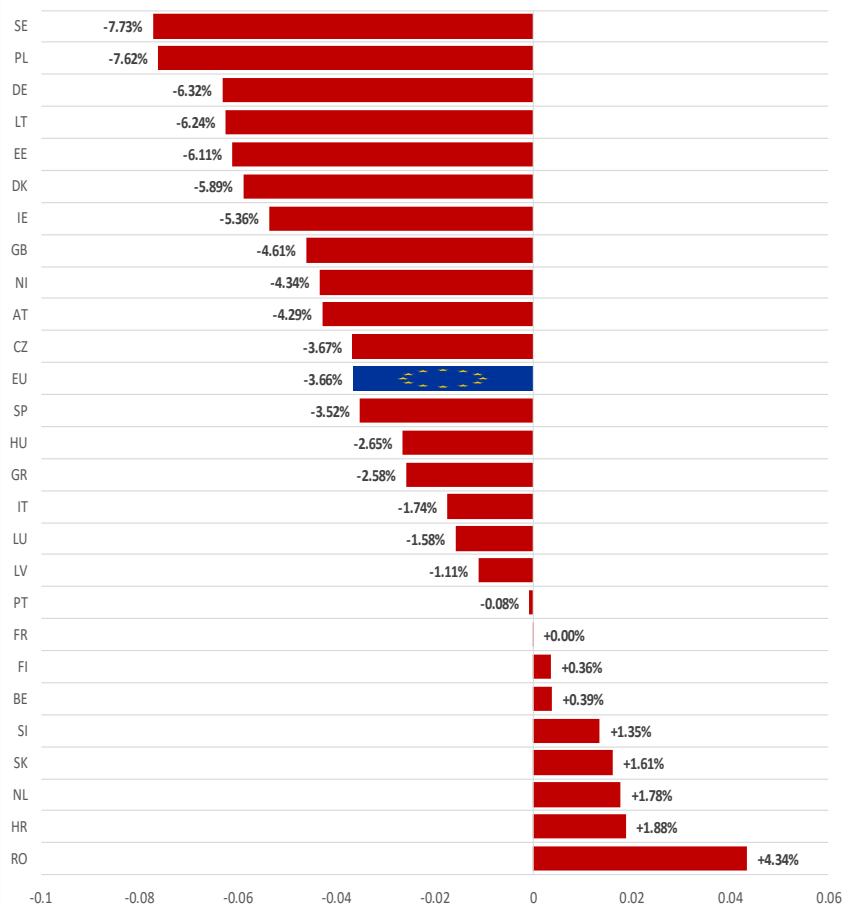
EXCHANGE RATE INDEX / Euro



1 October 2019

PRICES CARCASSES

EU ACZ R3 Price Comparison between average monthly price September 2018 - August 2019 compared to September 2017 - August 2018

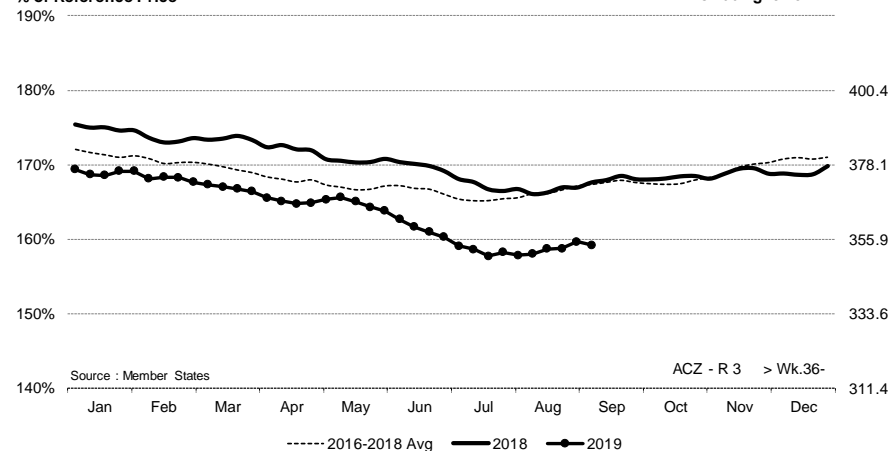


EU EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.36-2019

% of Reference Price

€/100 kg cwe



Price in week 36 : **354.16**

% change y/y : **- 5.0%**

% Ref. Price in wk 36 : **159.2%**

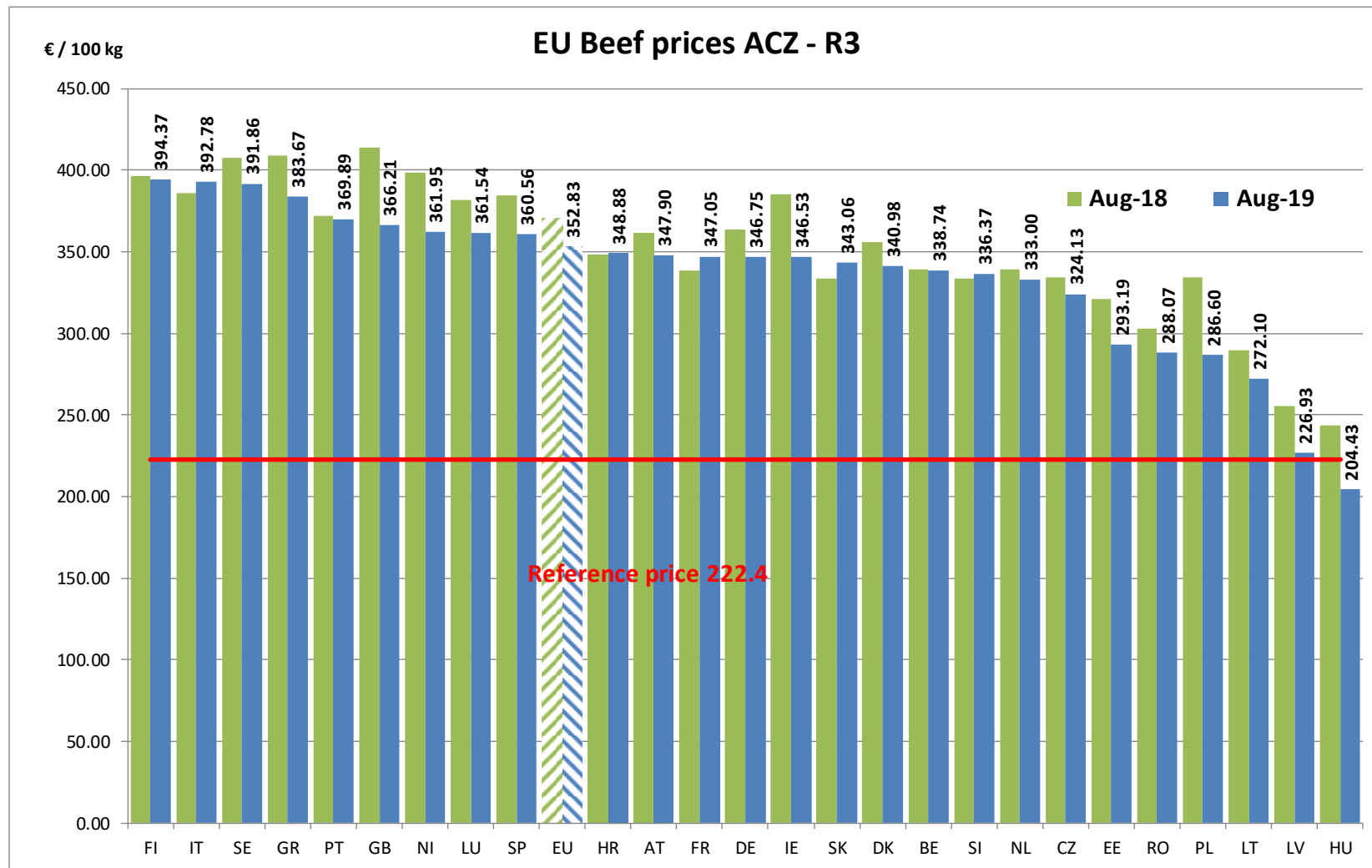
Average price in August 2019 : **352.83**

% change y/y : **- 4.7%**

1 October 2019

PRICES CARCASSES

EU EVOLUTION
A/C/Z.R3

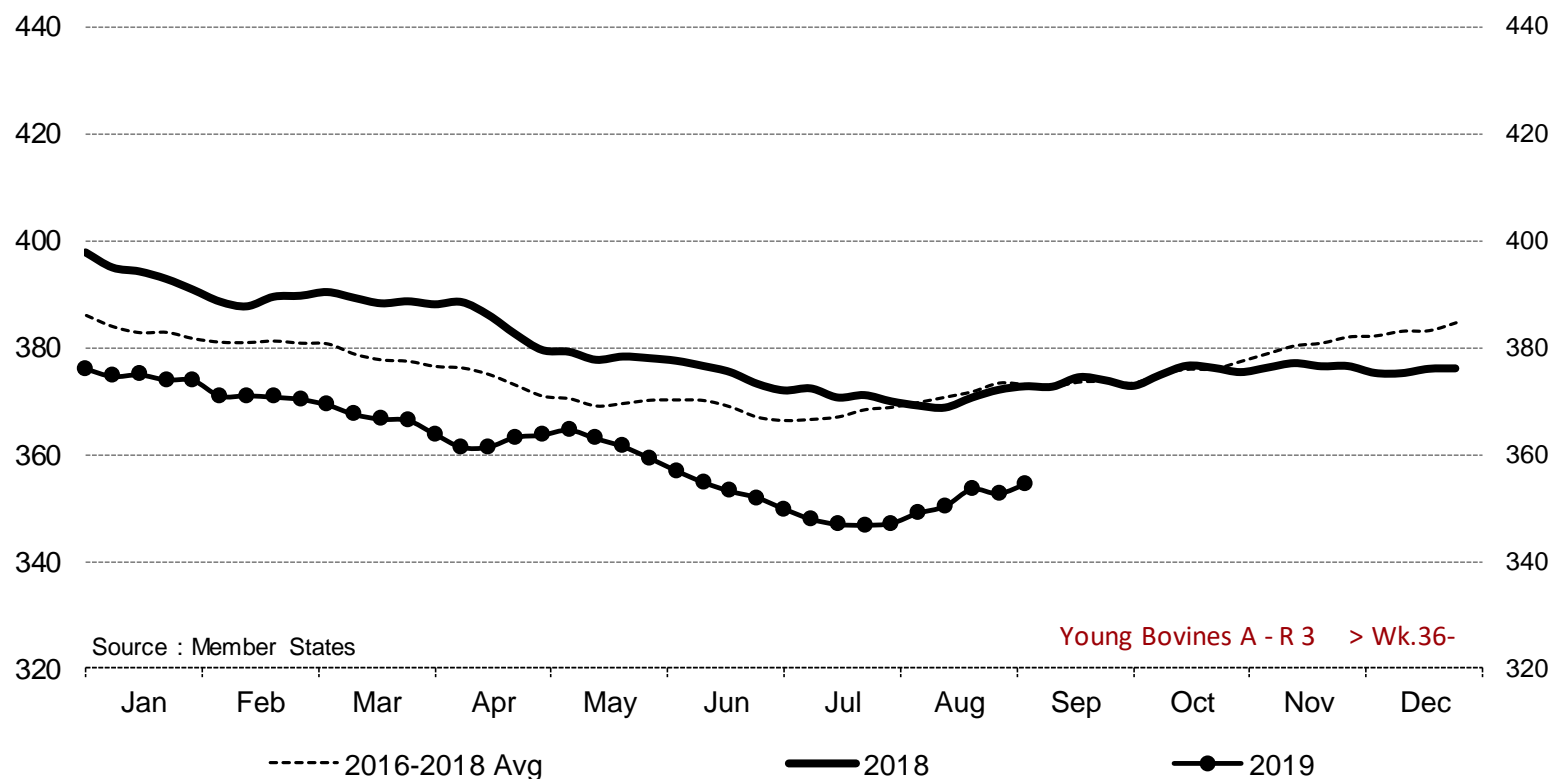


1 October 2019

PRICES CARCASSES

EU EVOLUTION YOUNG BULL - A.R3

Young Bovines A - R 3 > Wk.36-2019



Price in week 36 : **354.51**
% change y/y : **- 4.9%**

Average price in August 2019 : **350.80**
% change y/y : **- 5.2%**

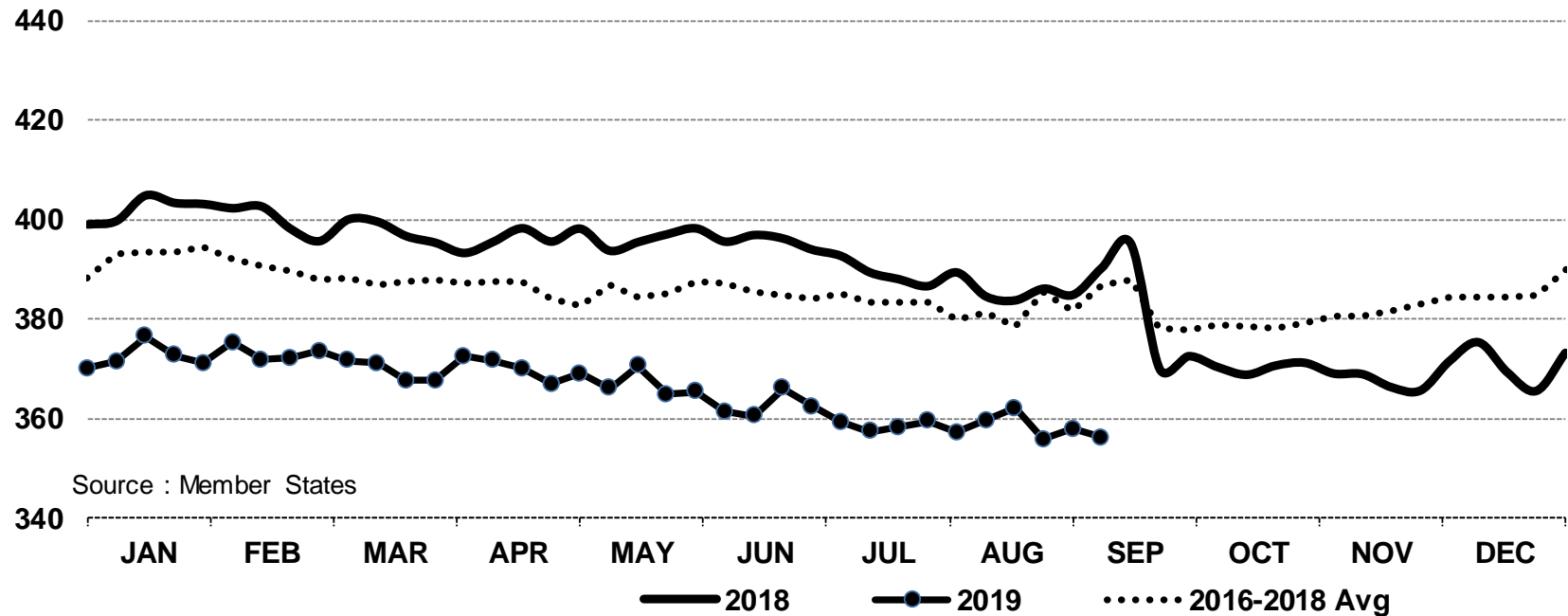
1 October 2019

PRICES CARCASSES

E.U. EVOLUTION YOUNG BOVINE 8-12M- Z.R3

In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.36-2019



Price in week 36 : **356.18**

08/08/2019

Average price in August 2019 : **358.70**

% change y/y : **- 8.7%**

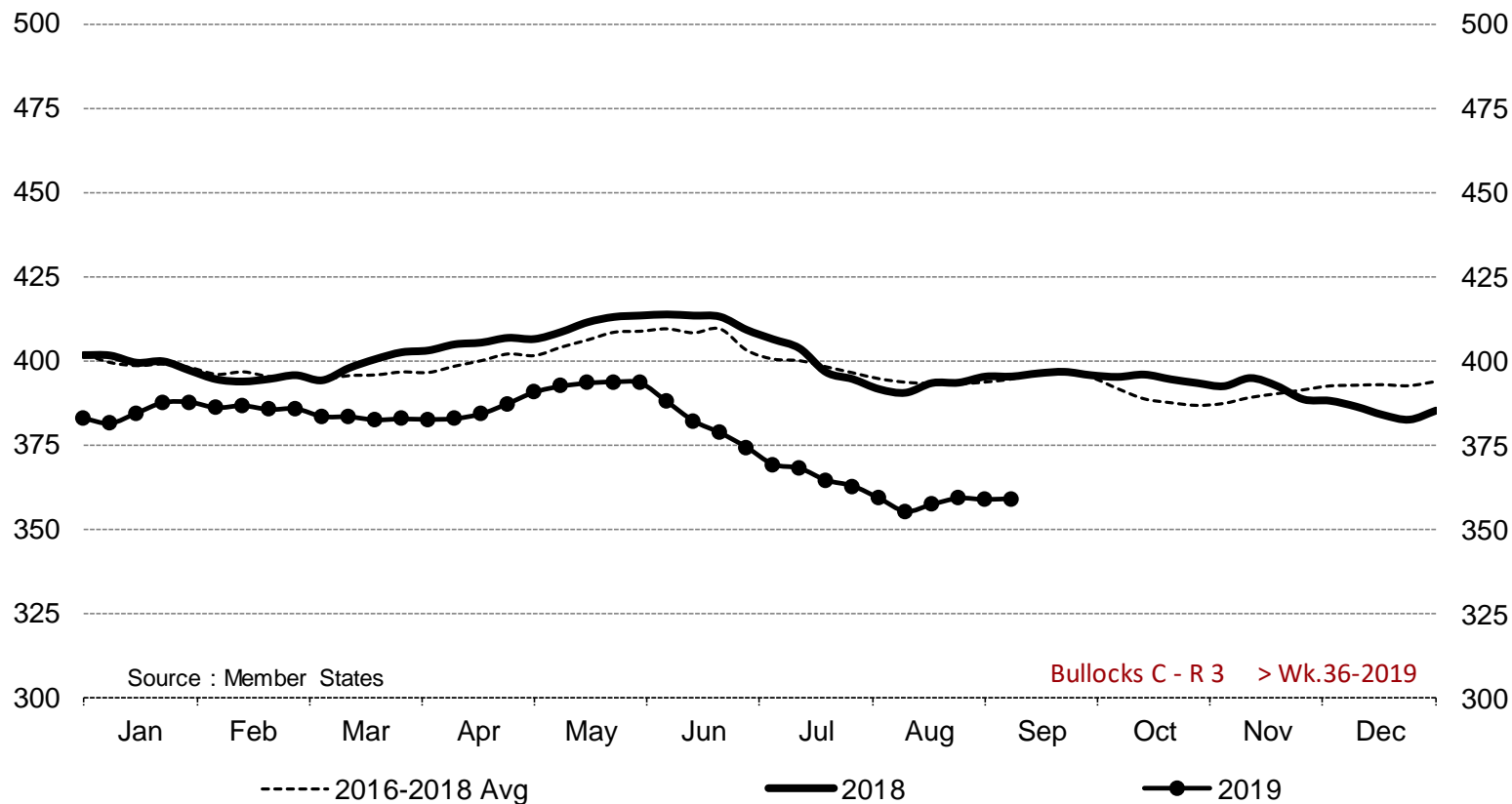
% change y/y : **- 7.0%**

1 October 2019

PRICES CARCASSES

E.U. EVOLUTION STEER - C.R3

Bullocks C - R 3 > Wk.36-2019



Price in week 36 : **358.88**
% change y/y : **- 9.2%**

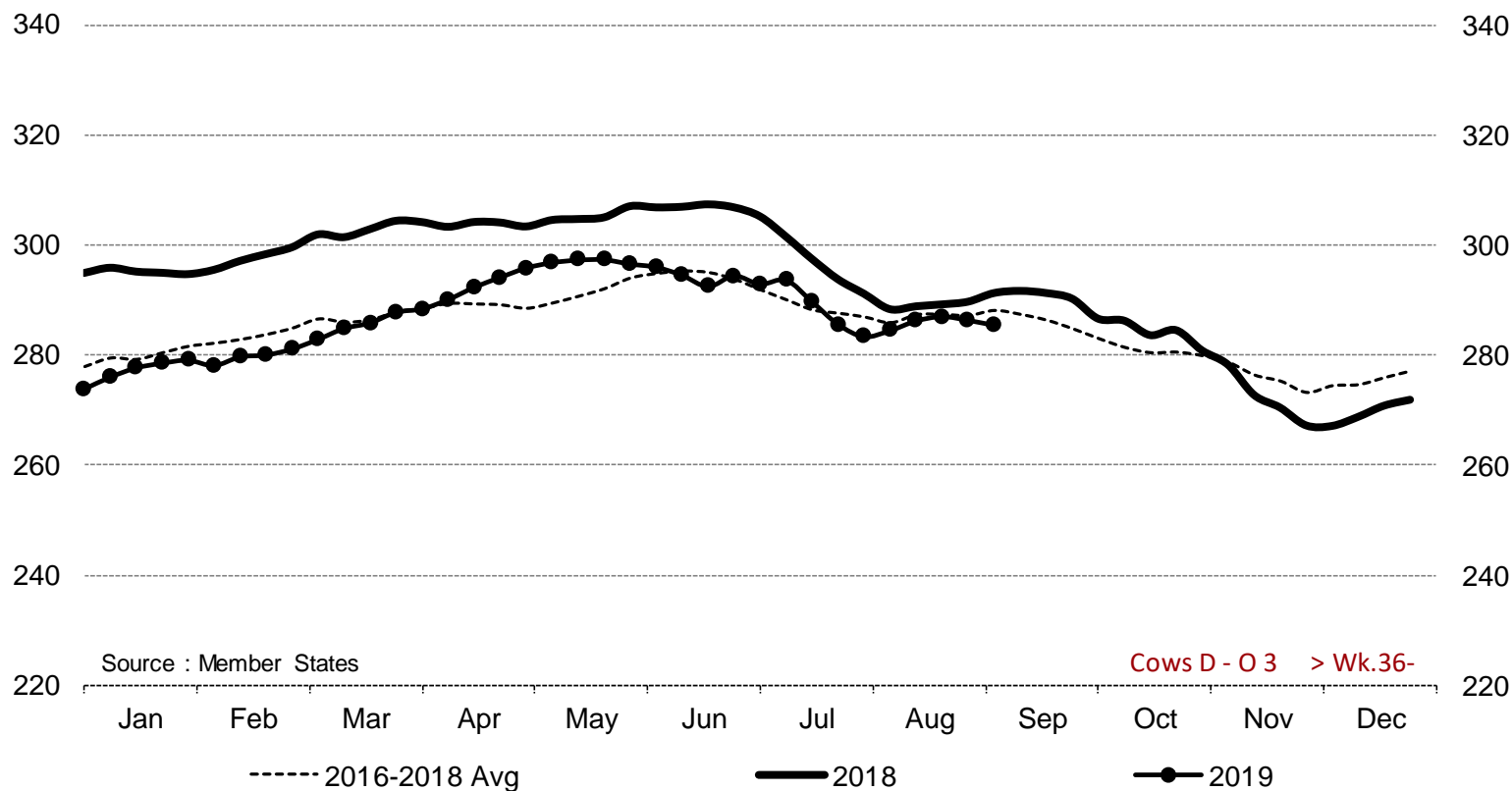
Average price in August 2019 : **357.58**
% change y/y : **- 9.0%**

1 October 2019

PRICES CARCASSES

E.U. EVOLUTION
COW - D.O3

Cows D - O 3 > Wk.36-2019



Price in week 36 : **285.42**
% change y/y : **- 2.0%**

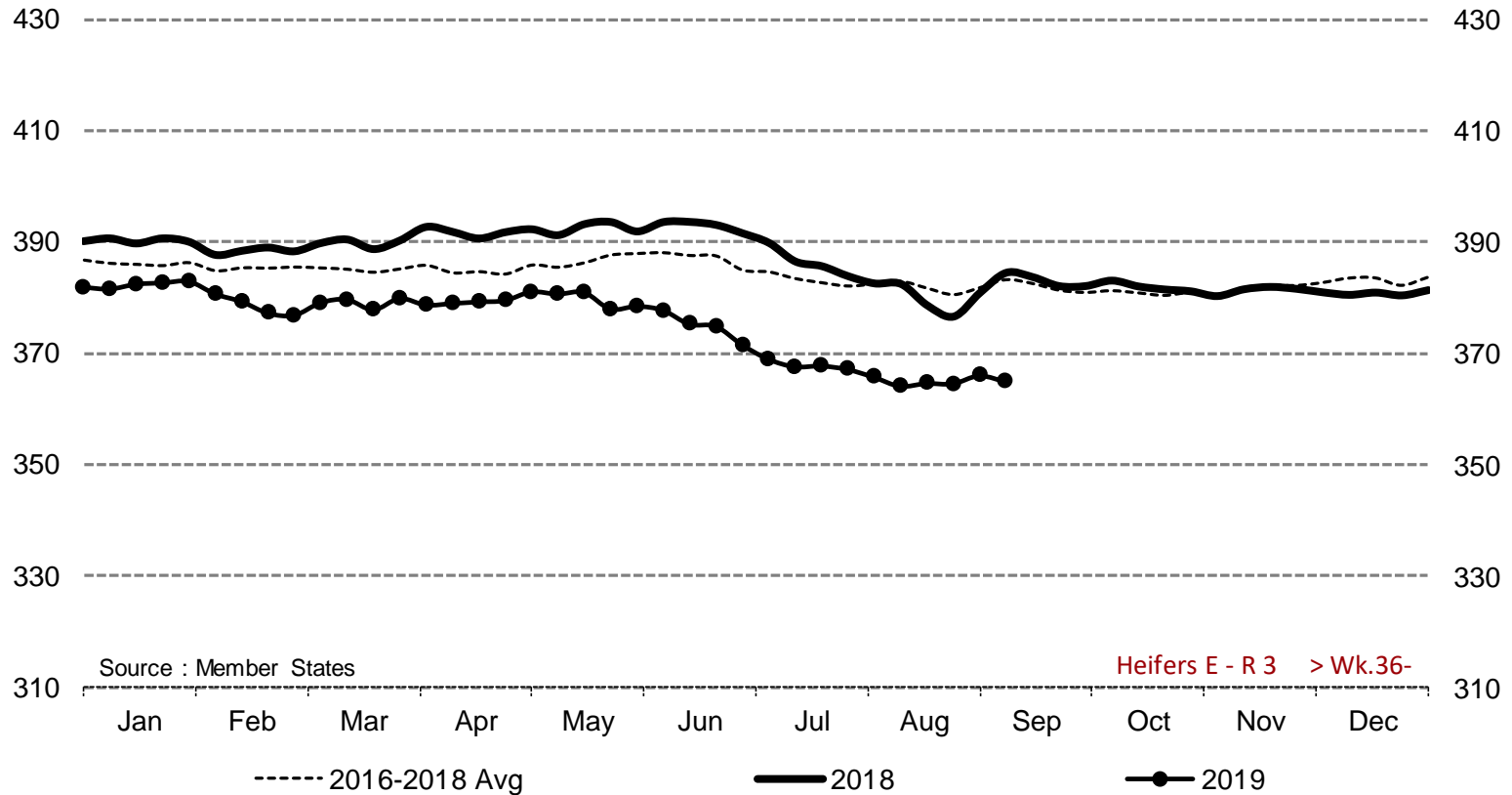
Average price in August 2019 : **285.66**
% change y/y : **- 1.3%**

1 October 2019

PRICES CARCASSES

EU EVOLUTION HEIFER - E.R3

Heifers E - R 3 > Wk.36-2019



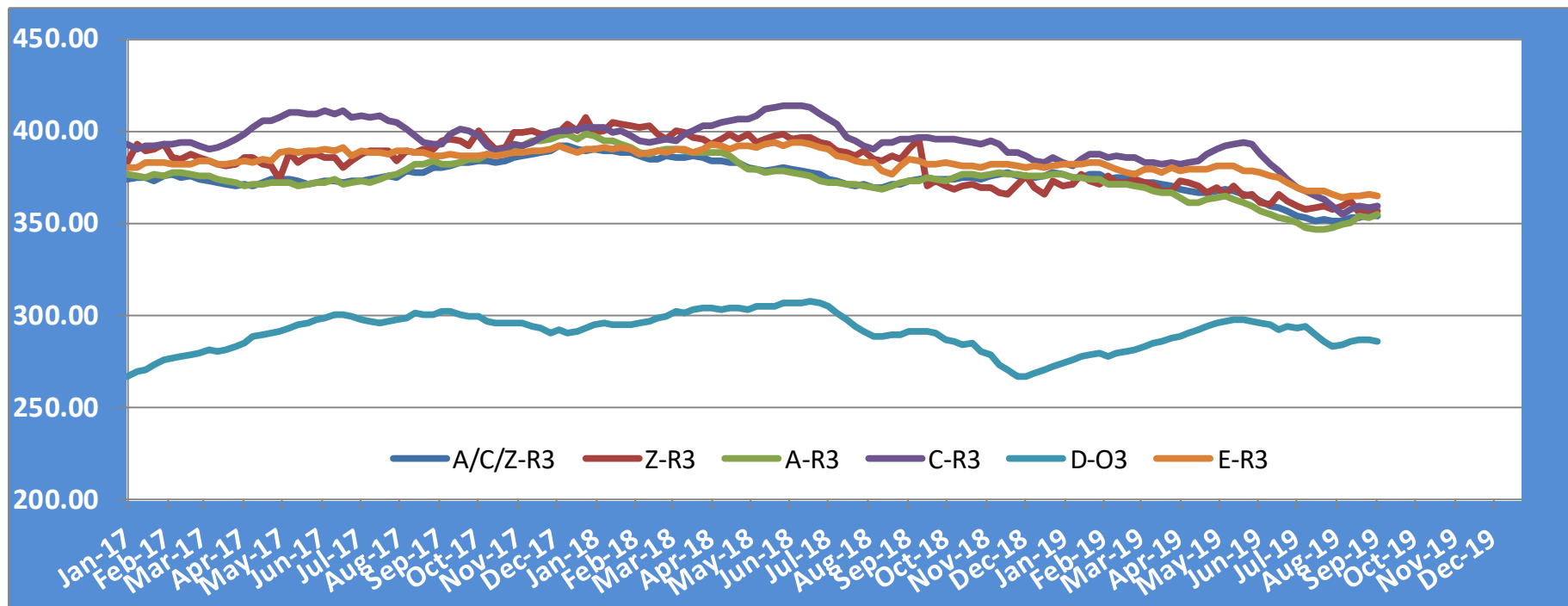
Price in week 36 : **364.92**
% change y/y : **- 5.1%**

Average price in August 2019 : **364.92**
% change y/y : **- 4.0%**

1 October 2019

PRICES CARCASSES

EU EVOLUTION All CAT GLOBAL VIEW

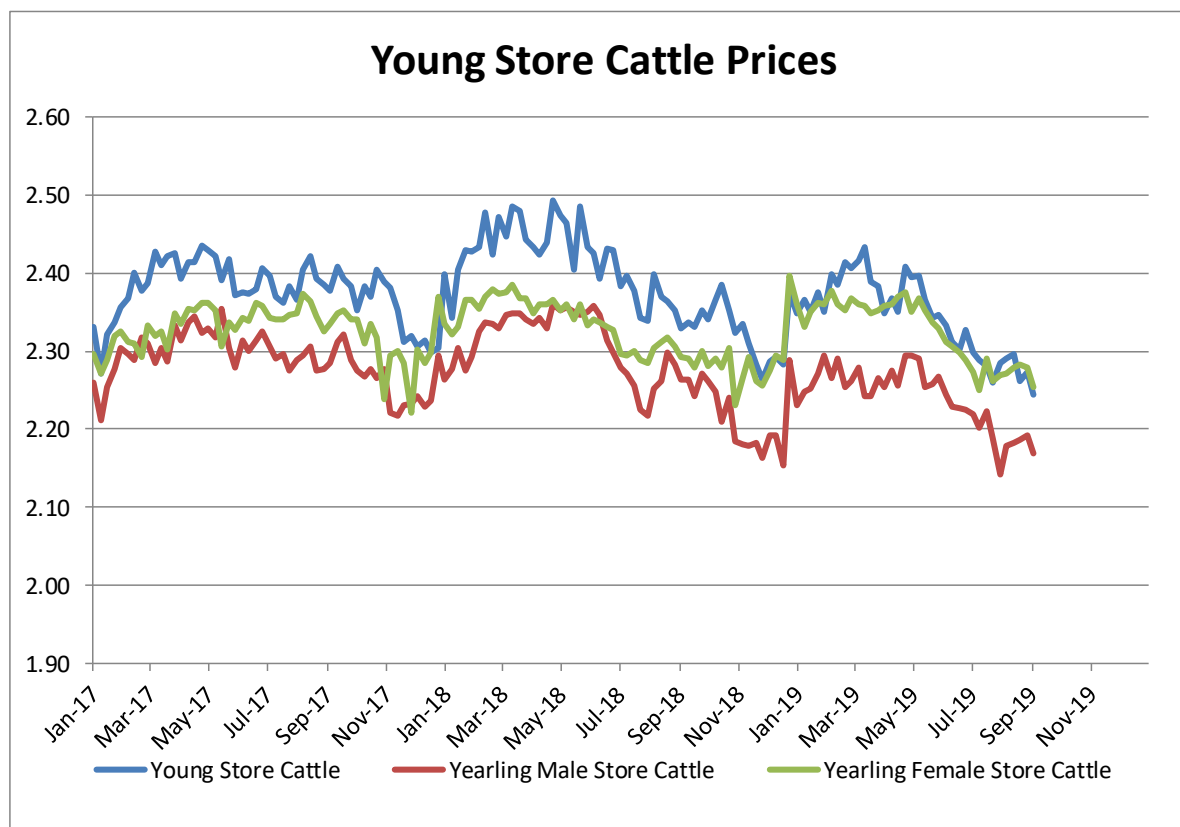


1 October 2019

PRICES LIVE BOVINES

EU EVOLUTION STORE CATTLE

Store cattle (€/100 kg live weight)



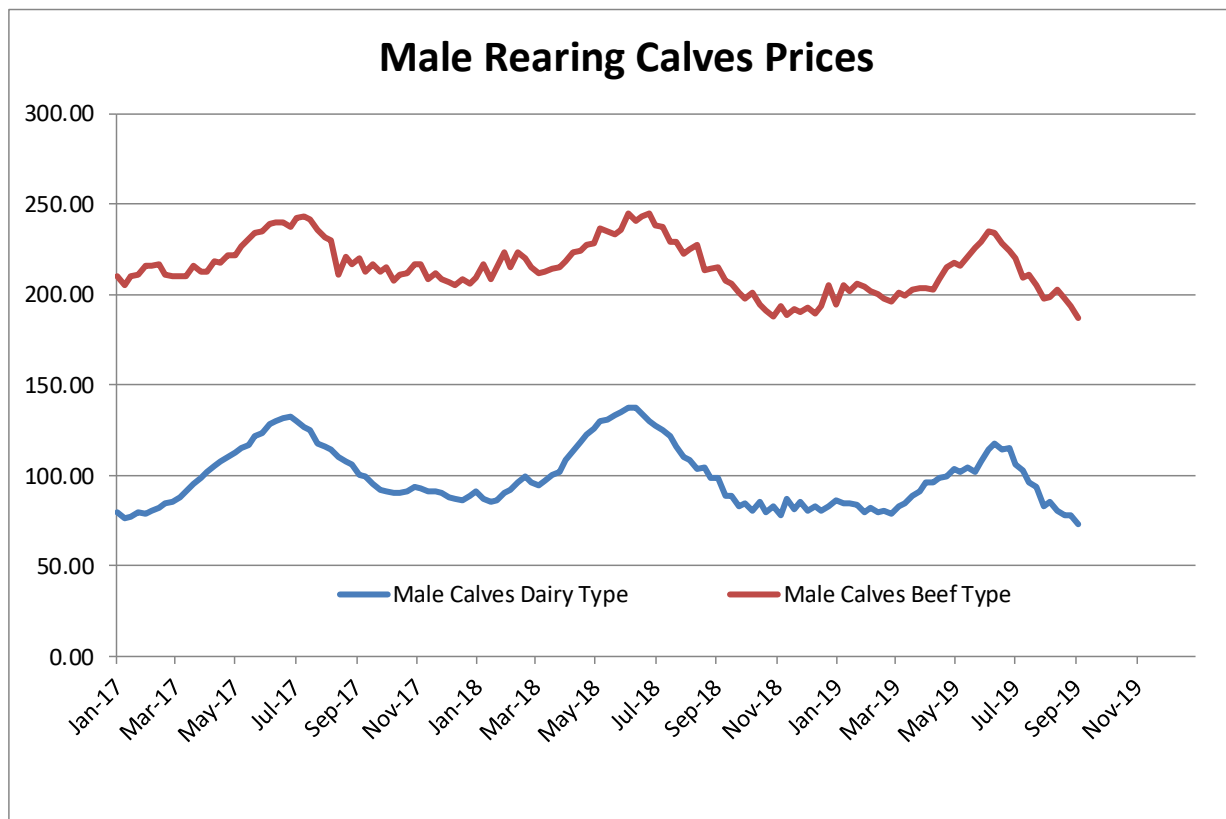
Young Store Cattle Price in	Week 36	2.24	Yearling Male Store Cattle Price	2.17
	Change y/y	-3.59%	Change y/y	-4.15%
Yearling Female Store Cattle Price		2.25		
	Change y/y	-1.64%		

1 October 2019

PRICES LIVE BOVINES

EU EVOLUTION Male Calves – 8D4W

Male calves aged between 8 days and 4 weeks (€/head)



Male Rearing Calves Beef type

Price in Week 36 187.18
Change y/y -12.89%

Male Rearing Calves Dairy type

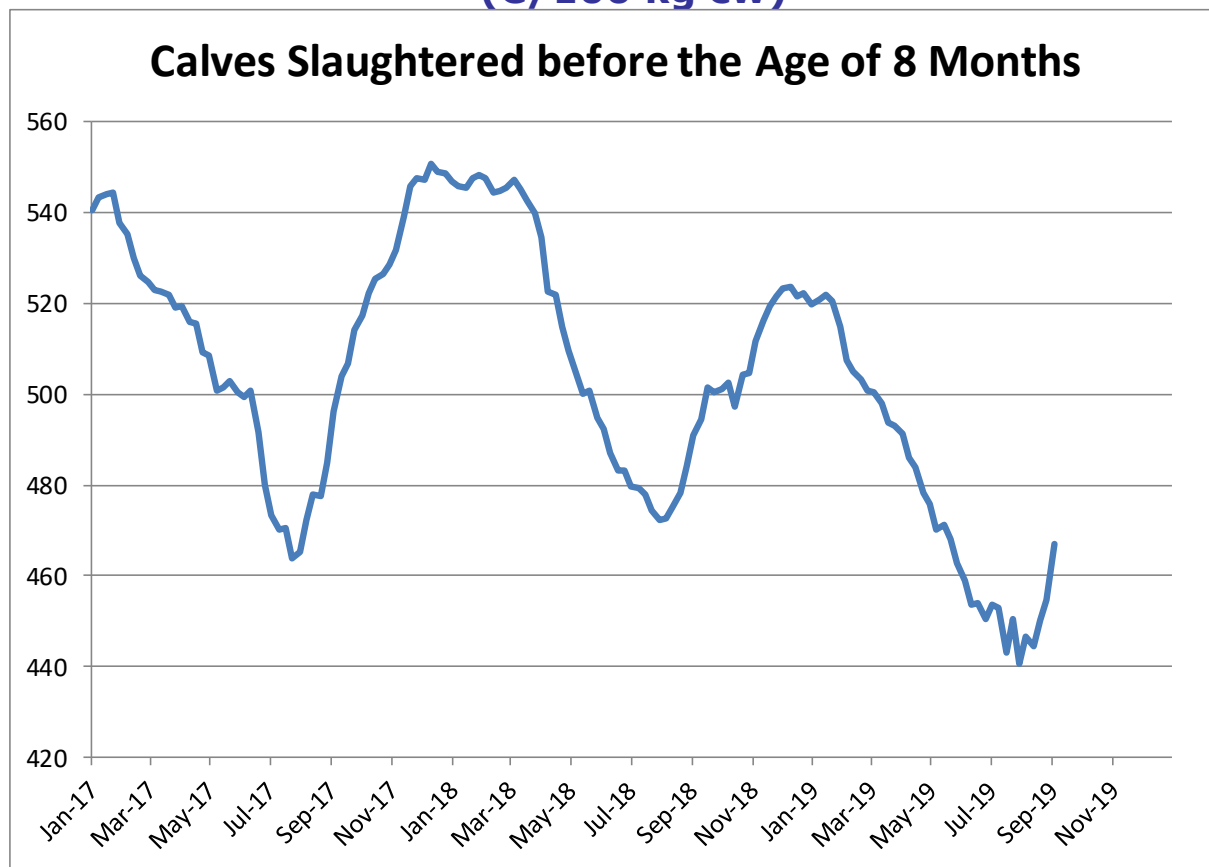
Price in Week 36 73.25
Change y/y -25.59%

1 October 2019

PRICES LIVE BOVINES

EU EVOLUTION Butcher Calves

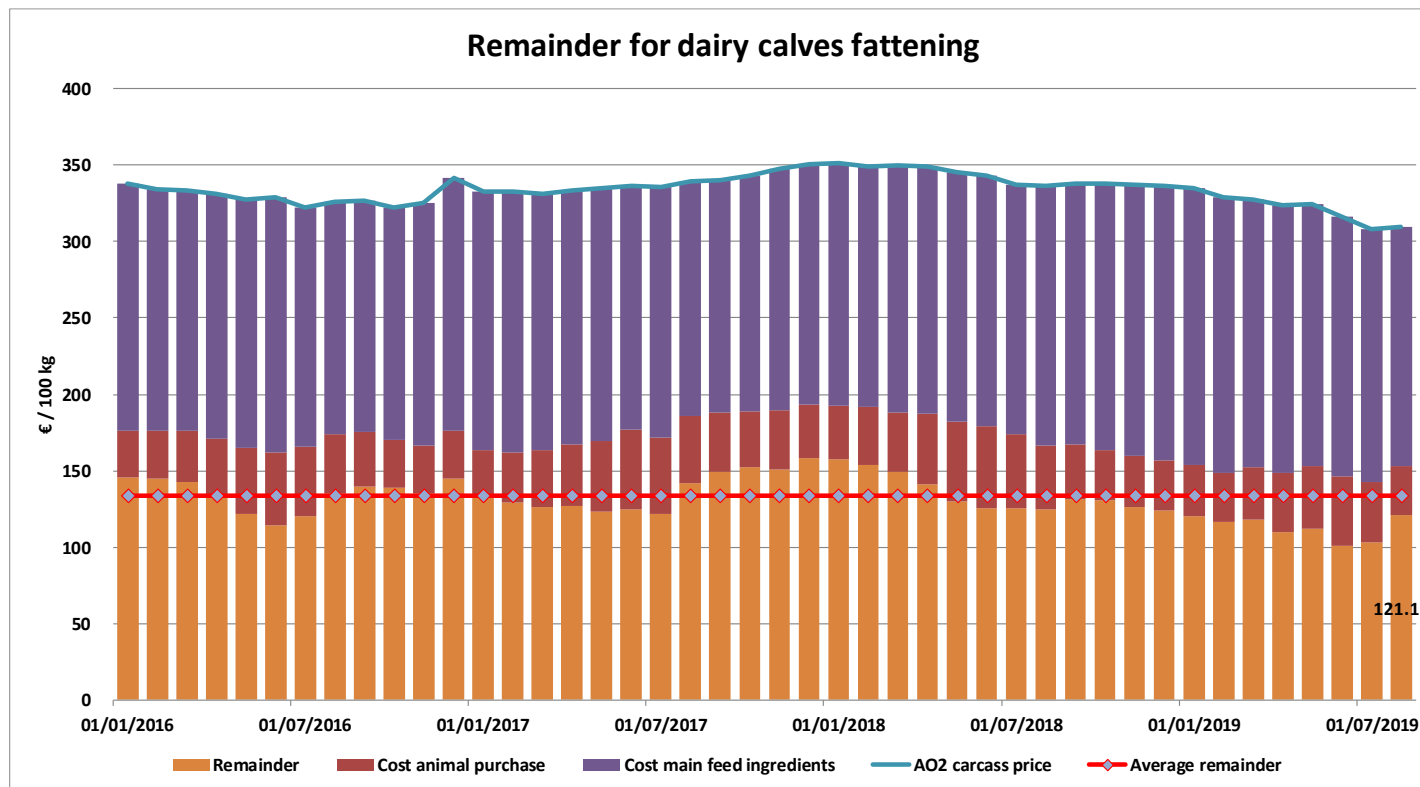
Calves slaughtered before the age of less than 8 months
(€/100 kg cw)



Price in Week 36 467.13 € / 100 kg of carcasse weight
Change y/ -4.86%

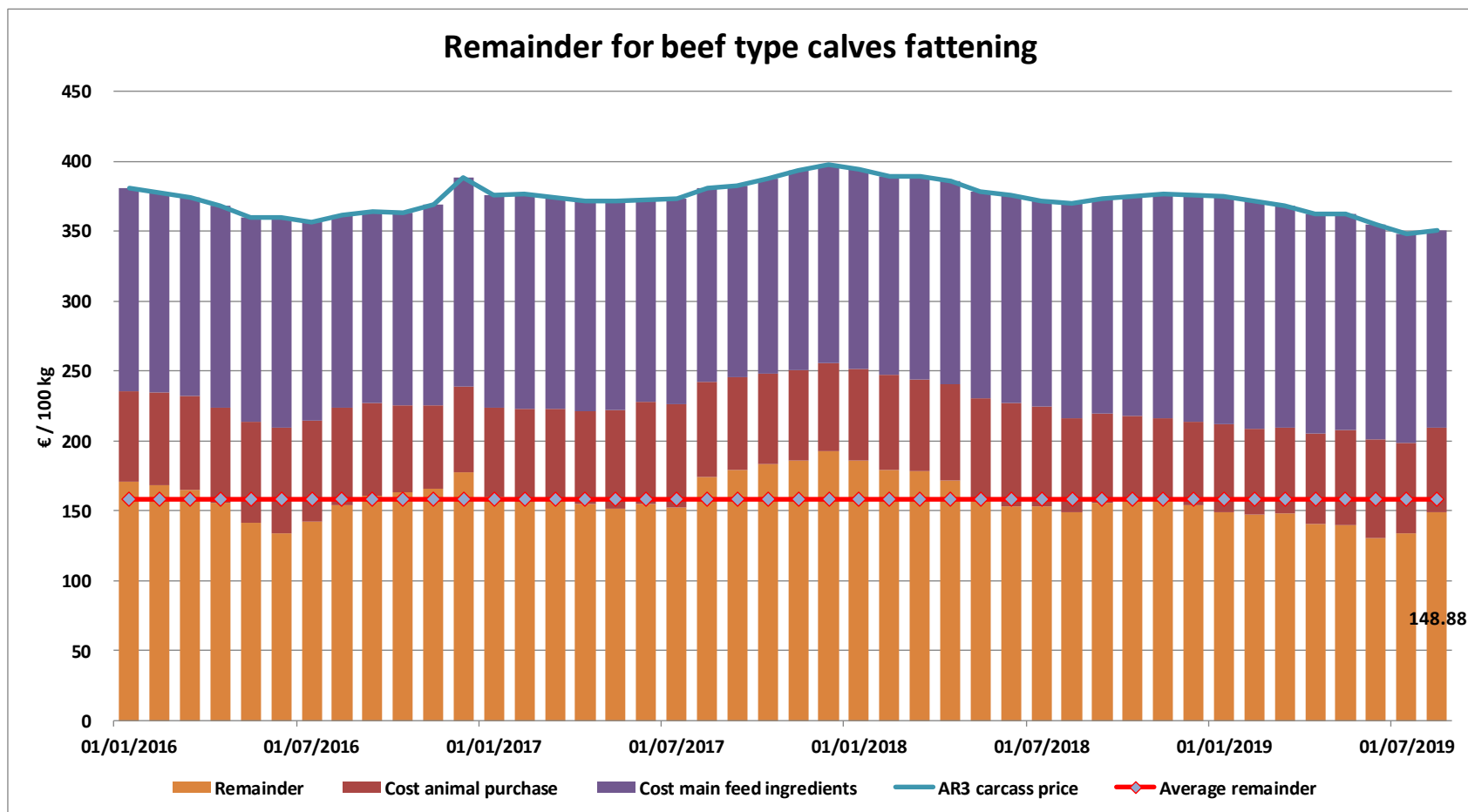
1 October 2019

REMAINDERS



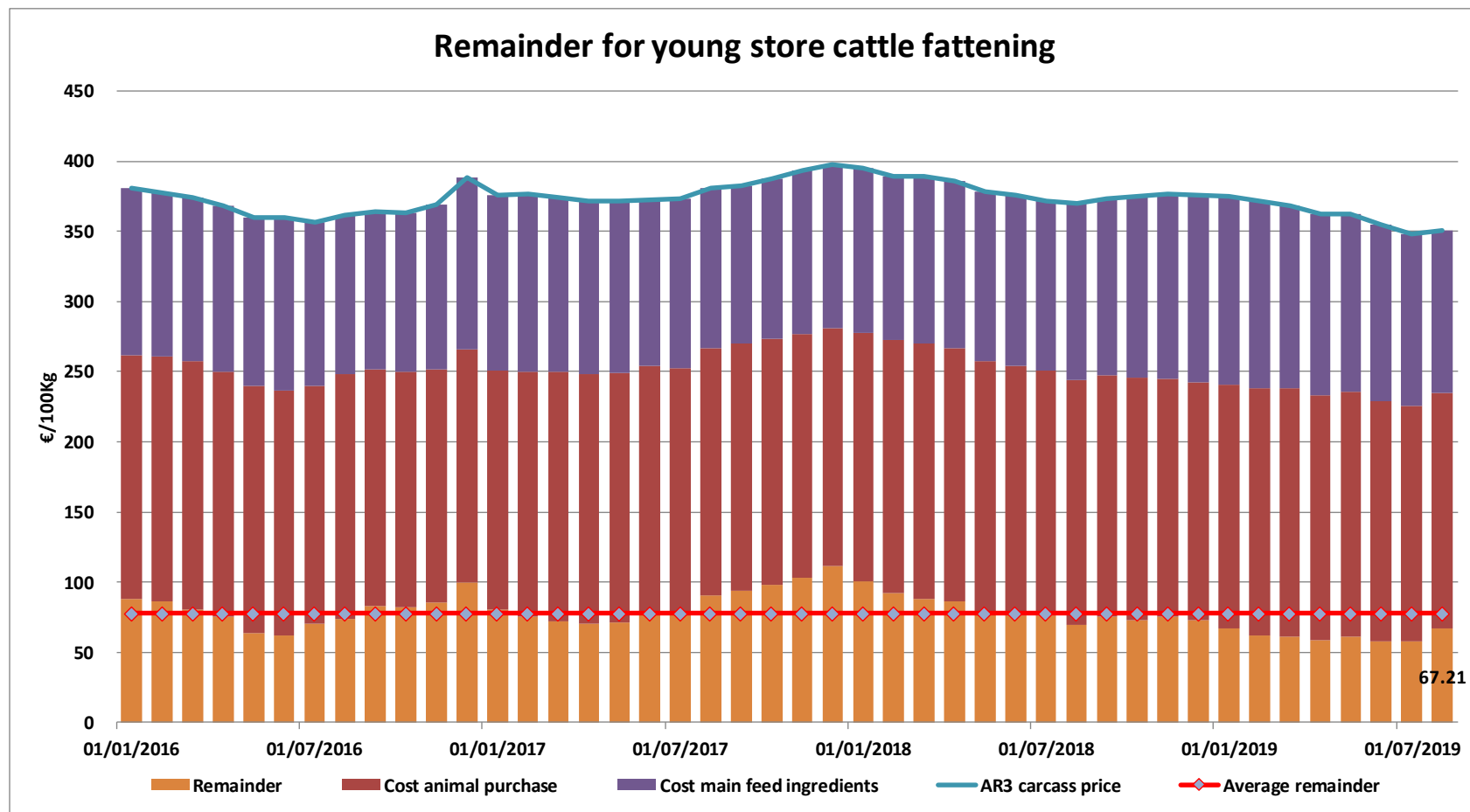
1 October 2019

REMAINDERS



1 October 2019

REMAINDERS



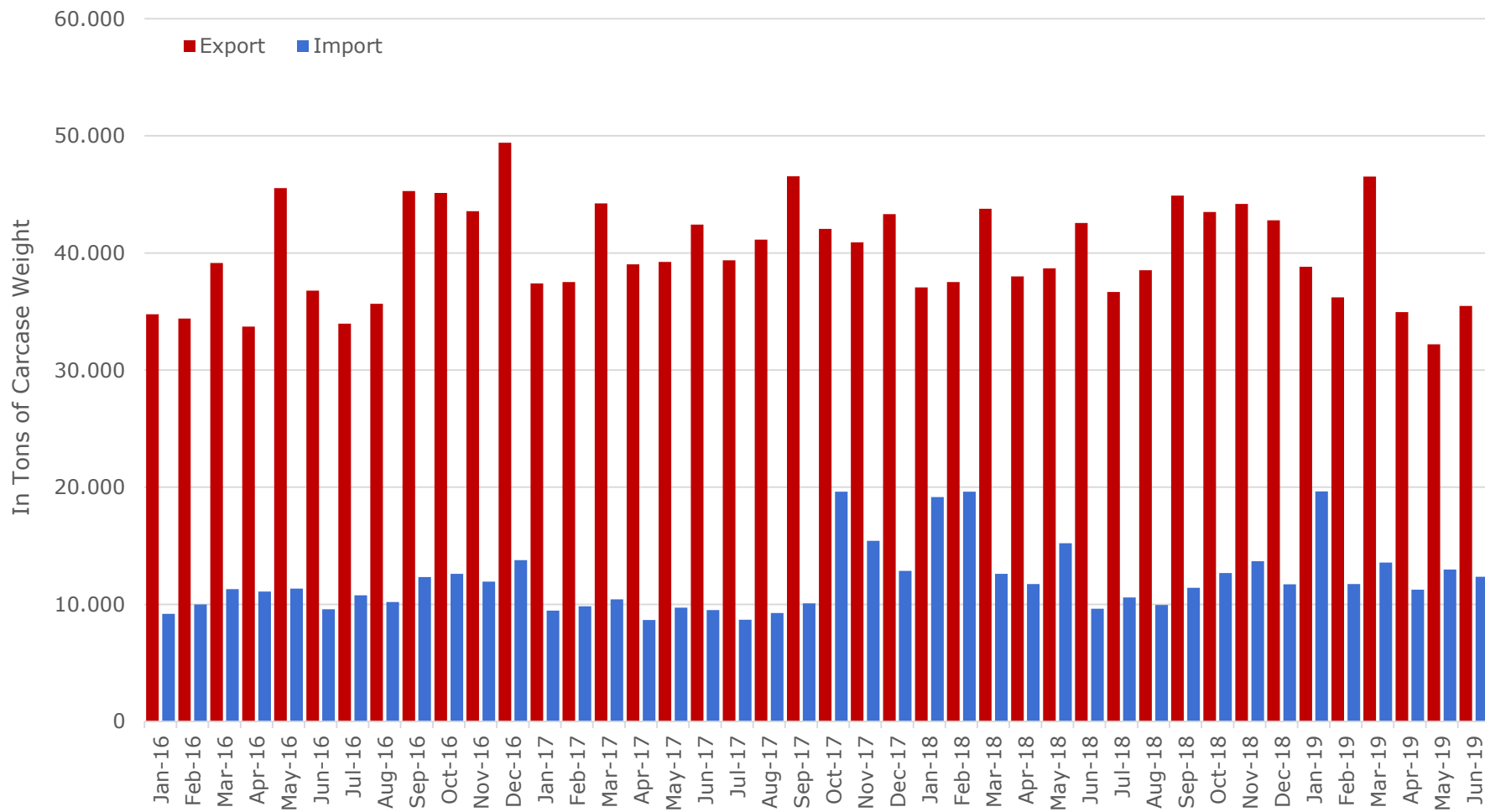
1 October 2019

Forecast Summary



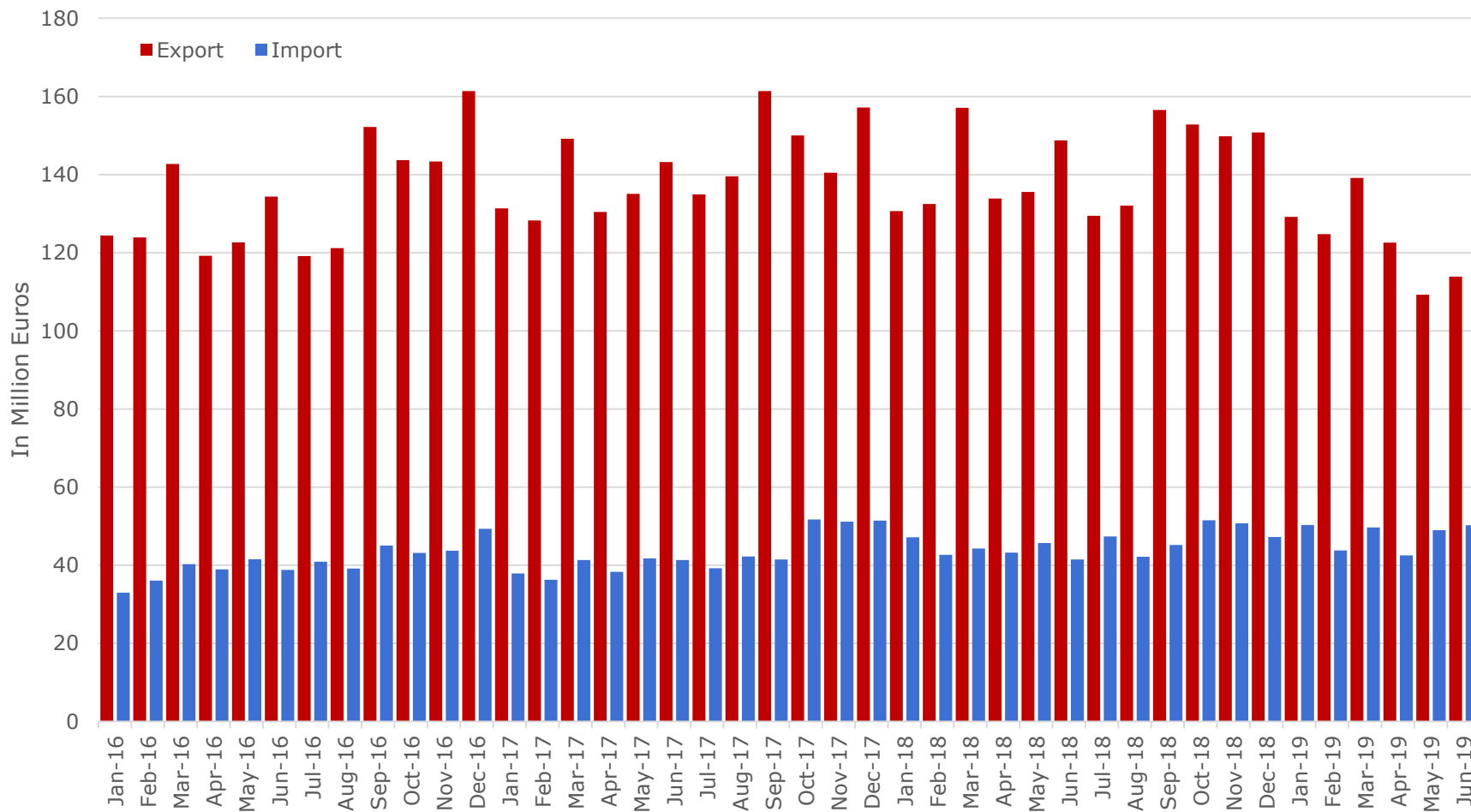
1 October 2019

EU27-2019 Trade of Beef with UK



1 October 2019

EU27-2019 Trade of Beef with UK



1 October 2019

TRADE

EU EXPORTS

Beef & Live Animals

EU exports of beef and live animals (1):

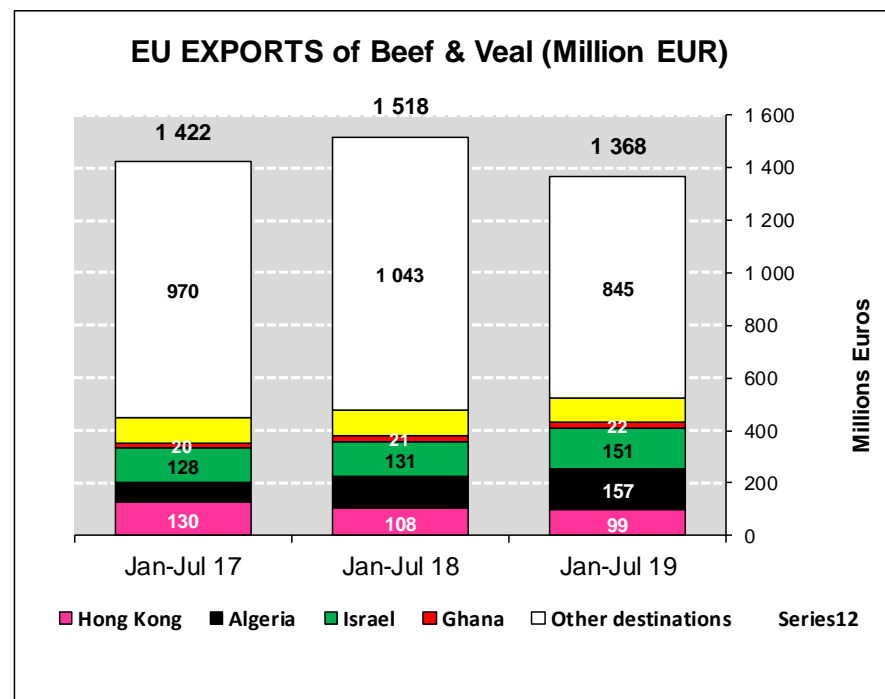
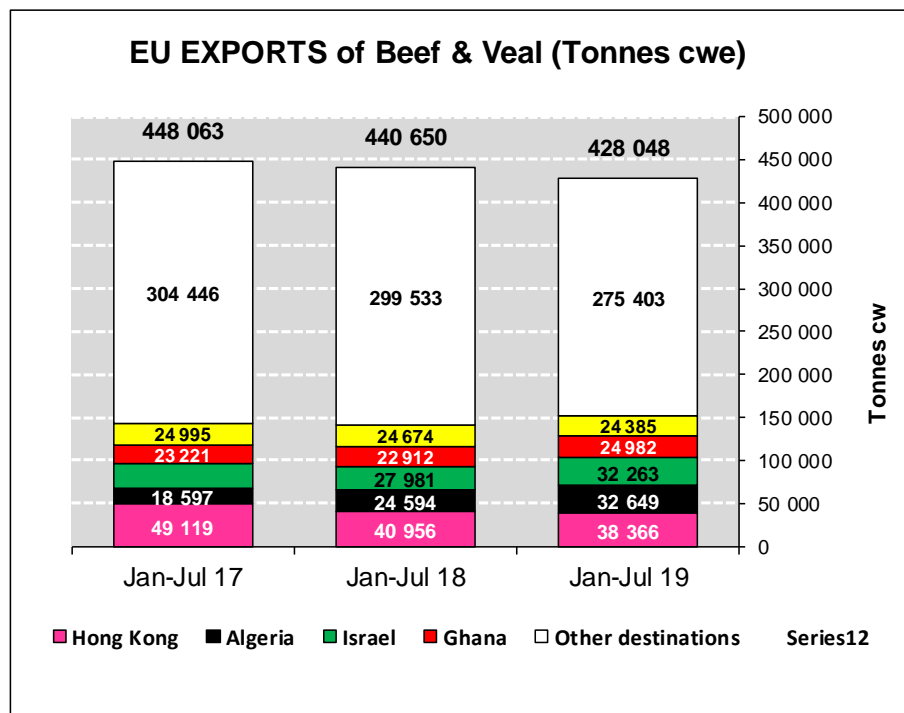
Trade figures (COMEXT – tonnes cwe)

Destinations	2015		2016		2017		2018		Jan-Jul 19		Compared to Jan-Jul 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	45 198	7.5%	58 383	8.3%	90 659	11.9%	69 897	9.5%	38 366	9.0%	- 6.3%
Algeria	16 085	2.7%	25 004	3.5%	26 305	3.4%	35 361	4.8%	32 649	7.6%	+ 32.8%
Israel	18 851	3.1%	41 535	5.9%	44 196	5.8%	47 812	6.5%	32 263	7.5%	+ 15.3%
Ghana	39 225	6.6%	39 680	5.6%	41 007	5.4%	39 906	5.4%	24 982	5.8%	+ 9.0%
Lebanon	50 263	8.4%	47 033	6.7%	38 554	5.0%	42 525	5.8%	24 385	5.7%	- 1.2%
Bosnia-Herz.	39 896	6.7%	38 875	5.5%	34 711	4.5%	38 763	5.3%	23 714	5.5%	+ 17.5%
Philippines	13 052	2.2%	24 454	3.5%	38 271	5.0%	29 794	4.1%	21 559	5.0%	+ 35.8%
Ivory Coast	36 018	6.0%	37 210	5.3%	38 582	5.0%	37 744	5.1%	20 272	4.7%	- 6.6%
Switzerland	26 015	4.3%	25 599	3.6%	27 369	3.6%	24 416	3.3%	15 572	3.6%	+ 0.7%
Turkey	57 504	9.6%	71 030	10.1%	96 414	12.6%	95 550	13.0%	13 263	3.1%	- 81.6%
Libya	19 691	3.3%	29 723	4.2%	27 848	3.6%	27 832	3.8%	12 548	2.9%	- 36.4%
China	6 027	1.0%	10 804	1.5%	6 229	0.8%	7 457	1.0%	11 648	2.7%	+++
Russia	13 546	2.3%	16 433	2.3%	22 989	3.0%	17 336	2.4%	11 179	2.6%	+ 25.5%
Chile	50	0.0%	2 228	0.3%	8 961	1.2%	16 410	2.2%	9 504	2.2%	+ 22.6%
South Africa	7 508	1.3%	7 335	1.0%	7 569	1.0%	12 113	1.7%	7 785	1.8%	- 3.5%
Morocco	4 703	0.8%	7 517	1.1%	10 005	1.3%	11 430	1.6%	7 296	1.7%	+ 8.0%
Ukraine	2 859	0.5%	7 875	1.1%	7 331	1.0%	10 465	1.4%	7 246	1.7%	+ 36.1%
Other Destinations	202 225	33.8%	215 988	30.6%	197 167	25.8%	168 706	23.0%	113 817	26.6%	
Extra-EU	598 715		706 705		764 166		733 516		428 048		
% change			+ 18%		+ 8%		- 4%		- 2.9%		

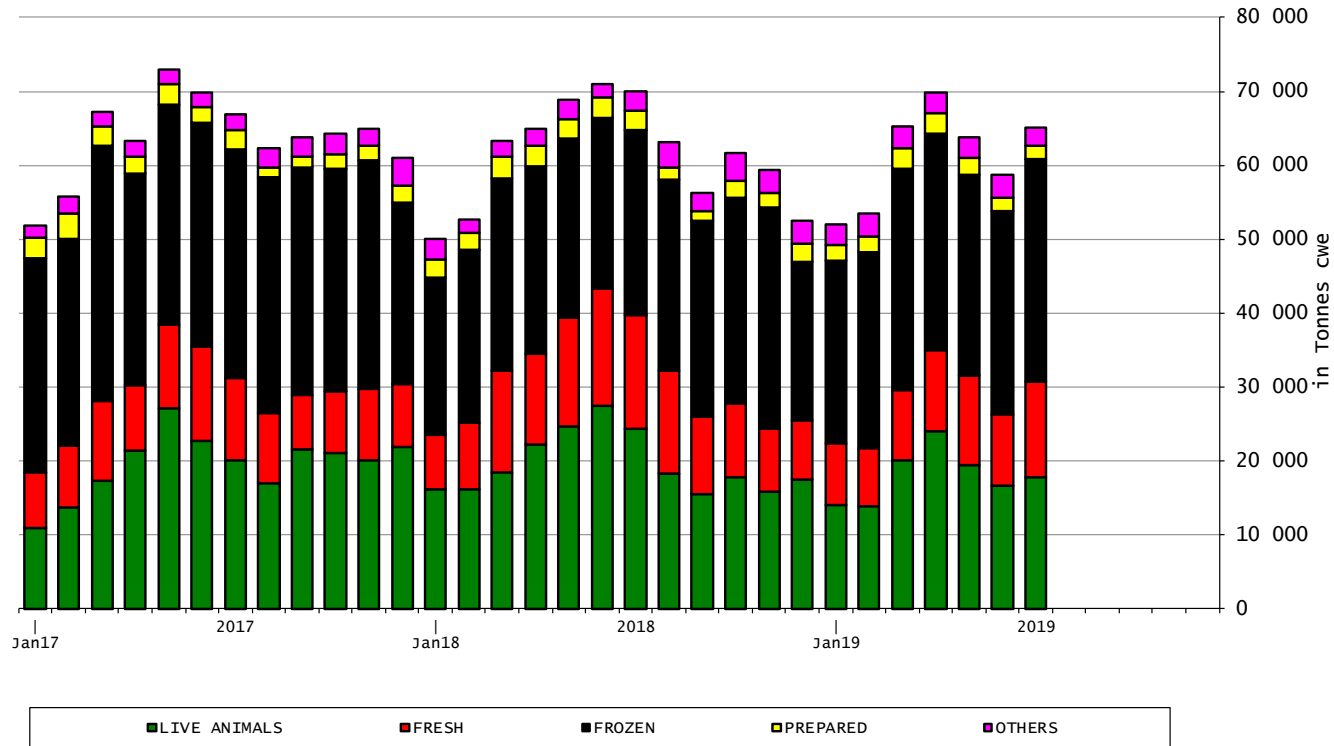
EU exports of beef: Trade figures (COMEXT – tonnes cwe)

Destinations	2015		2016		2017		2018		Jan-Jul 19		Compared to Jan-Jul 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	45 198	10.7%	58 383	12.0%	90 659	17.1%	69 897	14.0%	38 366	12.7%	- 6.3%
Ghana	39 225	9.3%	39 680	8.1%	41 007	7.8%	39 906	8.0%	24 982	8.3%	+ 9.0%
Bosnia-Herz.	36 593	8.7%	36 790	7.6%	32 181	6.1%	36 152	7.2%	22 439	7.4%	+ 18.5%
Philippines	13 052	3.1%	24 454	5.0%	38 271	7.2%	29 794	6.0%	21 559	7.1%	+ 35.8%
Ivory Coast	36 016	8.6%	37 210	7.6%	38 572	7.3%	37 744	7.6%	20 272	6.7%	- 6.6%
Switzerland	25 006	5.9%	24 425	5.0%	26 231	5.0%	23 364	4.7%	14 927	4.9%	+ 1.1%
Israel	6 087	1.4%	15 056	3.1%	18 749	3.5%	22 207	4.4%	14 434	4.8%	+ 11.2%
China	6 027	1.4%	10 804	2.2%	6 229	1.2%	7 457	1.5%	11 648	3.9%	+++
Algeria	6 662	1.6%	10 726	2.2%	12 304	2.3%	13 919	2.8%	10 463	3.5%	+ 31.2%
Chile	50	0.0%	2 228	0.5%	8 961	1.7%	16 410	3.3%	9 504	3.1%	+ 22.6%
South Africa	7 508	1.8%	7 335	1.5%	7 569	1.4%	12 113	2.4%	7 785	2.6%	- 3.5%
Ukraine	2 747	0.7%	7 094	1.5%	6 926	1.3%	9 887	2.0%	7 012	2.3%	+ 41.3%
Vietnam	11 881	2.8%	22 308	4.6%	14 205	2.7%	9 171	1.8%	6 950	2.3%	+ 68.6%
North Macedonia	12 375	2.9%	11 479	2.4%	11 285	2.1%	10 002	2.0%	6 363	2.1%	+ 10.7%
Norway	19 122	4.5%	18 318	3.8%	12 858	2.4%	7 980	1.6%	4 844	1.6%	- 24.9%
USA	2 633	0.6%	3 855	0.8%	4 576	0.9%	5 830	1.2%	4 695	1.6%	+ 58.2%
Japan	2 225	0.5%	3 265	0.7%	4 293	0.8%	3 355	0.7%	4 437	1.5%	+++
Other Destinations	148 415	35.3%	153 480	31.5%	154 148	29.1%	143 893	28.8%	71 072	23.6%	
Extra-EU	420 822		486 889		529 023		499 079		301 751		
% change			+ 16%		+ 9%		- 6%		+ 3.6%		

EU exports of beef and live animals: Trade figures (COMEXT)



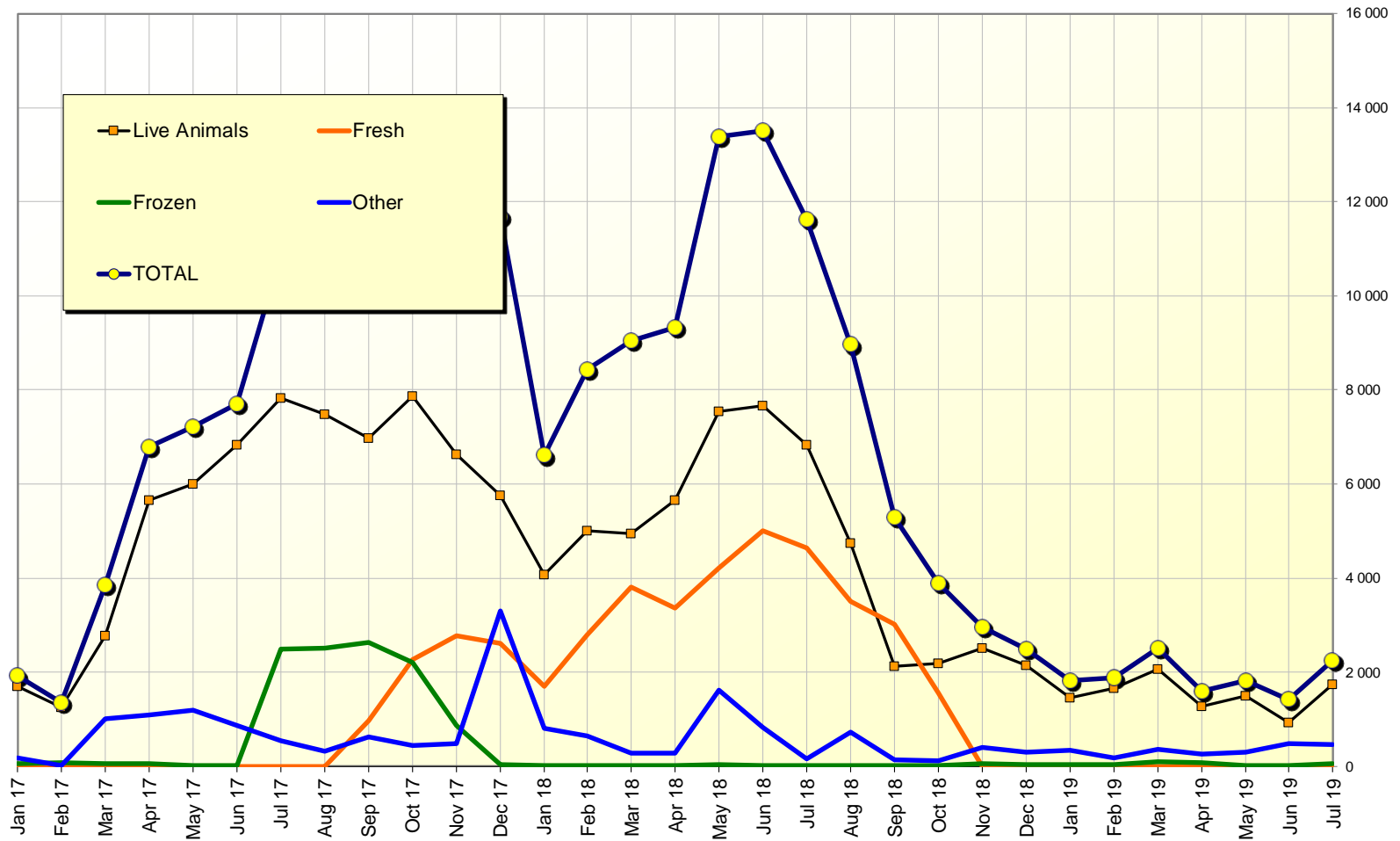
EU-28 Exports of BEEF products



TRADE

EU EXPORTS Beef to TURKEY

EU beef Exports to TURKEY
Trade figures (COMEXT data) *tonnes cwe*

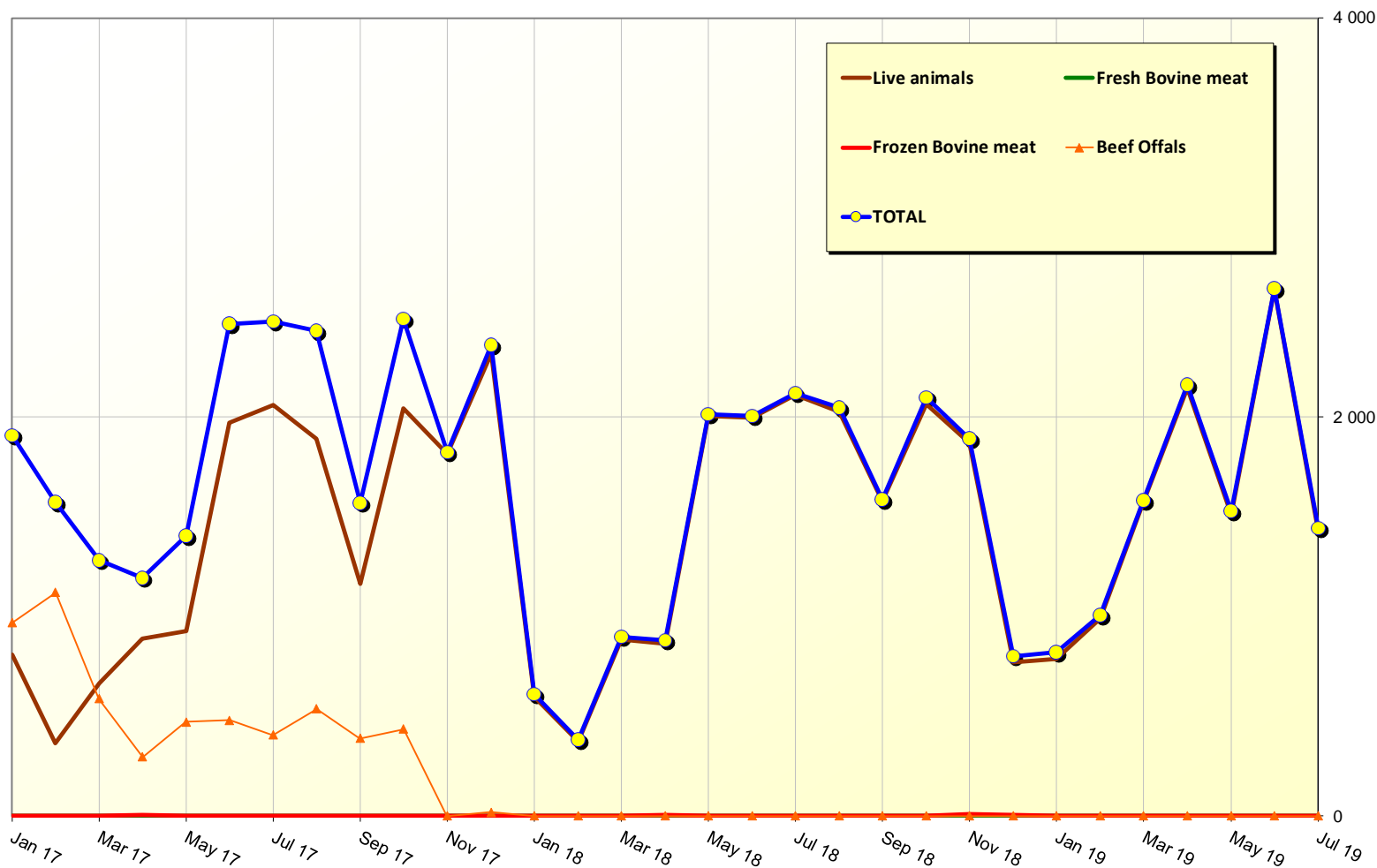


1 October 2019

TRADE

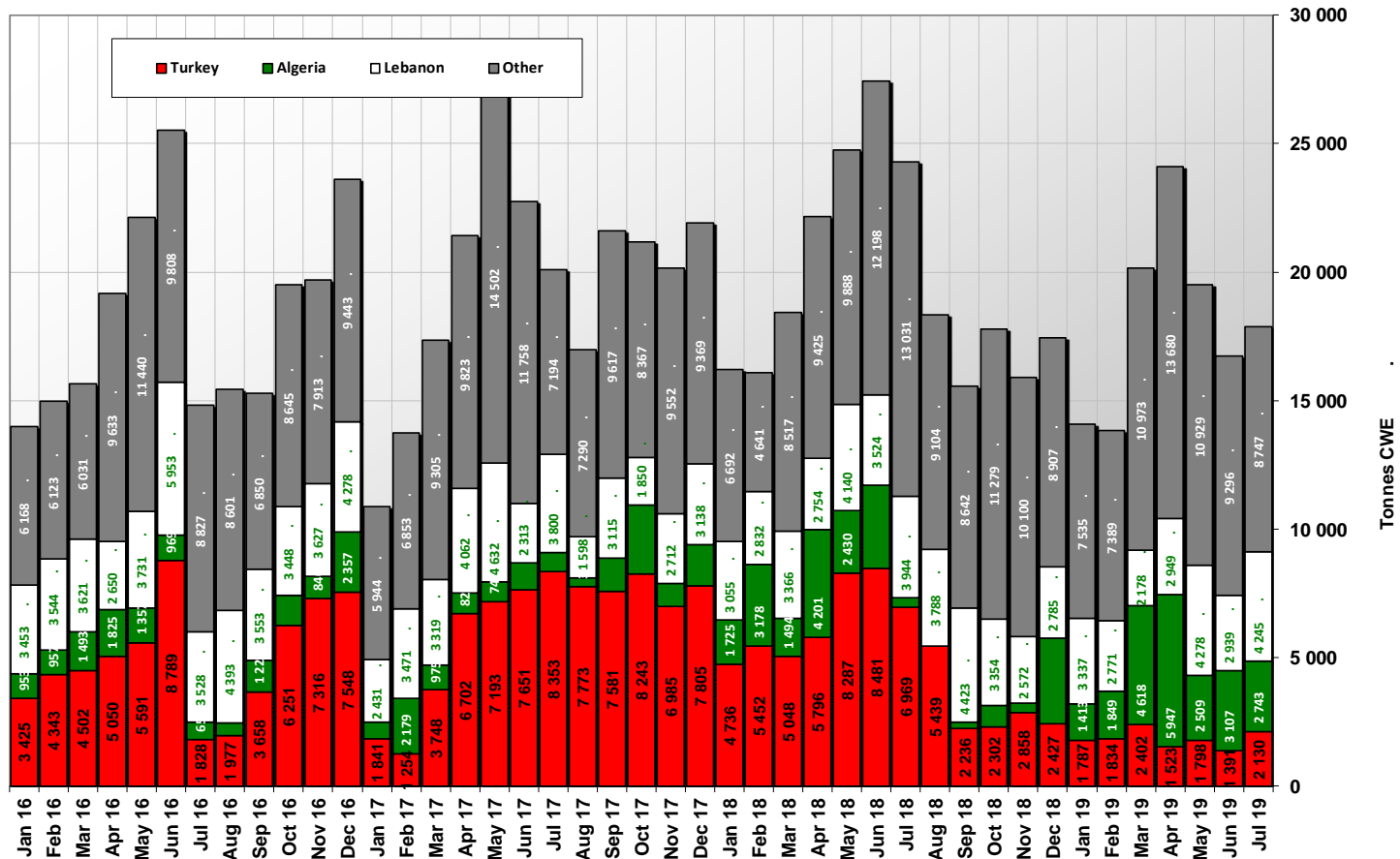
EU EXPORTS Beef to RUSSIA

EU beef Exports to RUSSIA
Trade figures (COMEXT data) *tonnes cwe*



1 October 2019

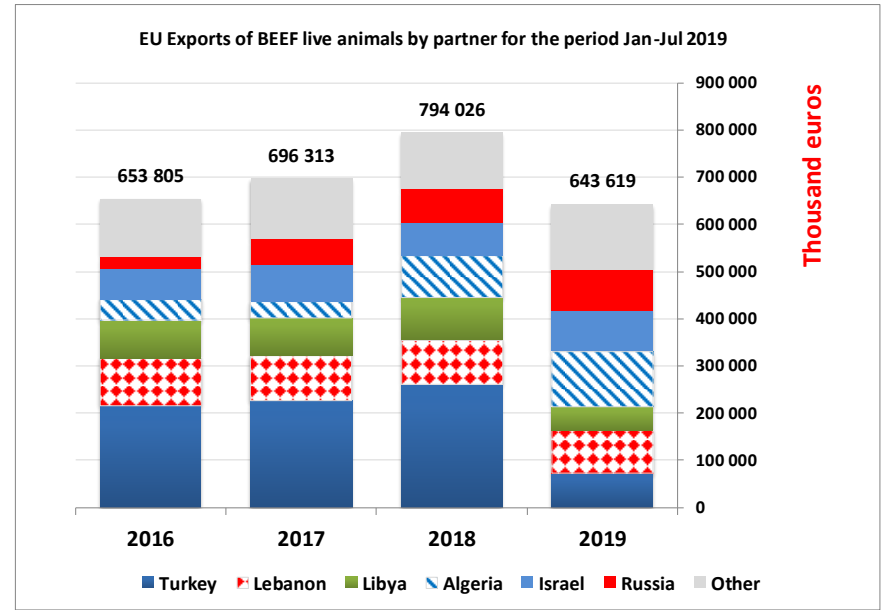
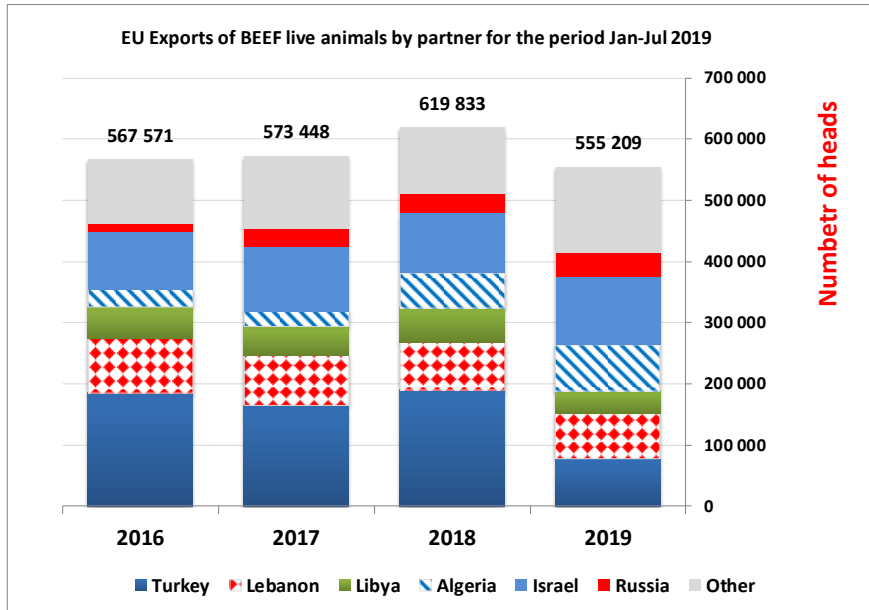
EU-28 Exports of LIVE Bovine Animals (Source COMEXT - Tonnes cwe)



1 October 2019

TRADE

EU EXPORTS Live Animals



1 October 2019

TRADE

EU IMPORTS

Beef & Live Animals

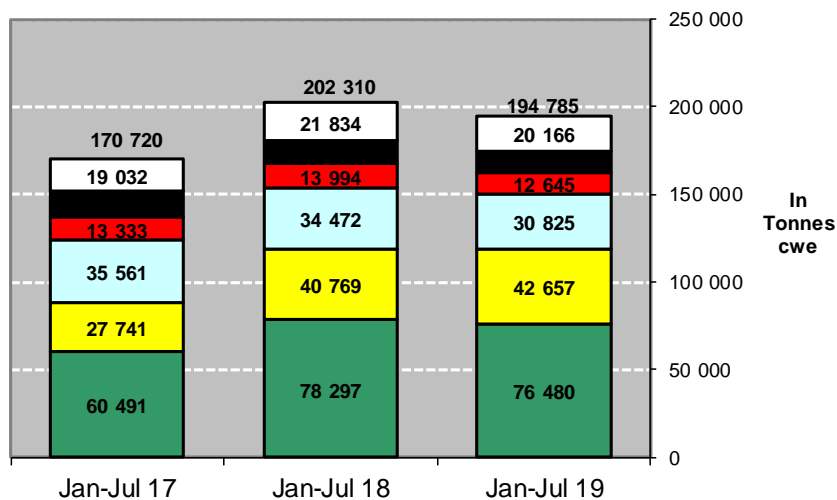
EU imports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Origins	2015		2016		2017		2018		Jan-Jul 19		Compared to Jan-Jul 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	136 858	42.4%	140 319	42.0%	115 392	37.7%	140 243	41.1%	76 480	39.3%	- 2.3%
Argentina	42 149	13.0%	43 542	13.0%	49 890	16.3%	69 996	20.5%	42 657	21.9%	+ 4.6%
Uruguay	46 287	14.3%	56 747	17.0%	57 985	18.9%	52 462	15.4%	30 825	15.8%	- 10.6%
Australia	30 884	9.6%	27 850	8.3%	21 990	7.2%	20 868	6.1%	12 645	6.5%	- 9.6%
USA	24 132	7.5%	20 499	6.1%	21 624	7.1%	19 319	5.7%	12 012	6.2%	- 7.2%
New Zealand	11 380	3.5%	9 869	3.0%	8 093	2.6%	8 669	2.5%	4 756	2.4%	- 9.8%
Namibia	12 112	3.7%	10 686	3.2%	7 705	2.5%	5 585	1.6%	4 752	2.4%	+ 28.3%
Paraguay	1 915	0.6%	5 979	1.8%	6 915	2.3%	6 287	1.8%	2 955	1.5%	- 25.1%
Switzerland	5 090	1.6%	5 500	1.6%	5 138	1.7%	5 437	1.6%	2 410	1.2%	- 21.3%
Botswana	9 258	2.9%	9 382	2.8%	7 718	2.5%	7 025	2.1%	2 008	1.0%	- 40.6%
Canada	428	0.1%	421	0.1%	513	0.2%	1 343	0.4%	1 302	0.7%	+++
Serbia	439	0.1%	557	0.2%	565	0.2%	1 162	0.3%	595	0.3%	- 16.5%
Japan	359	0.1%	579	0.2%	693	0.2%	859	0.3%	545	0.3%	+ 20.9%
Other Origins	1 810	0.6%	2 022	0.6%	1 842	0.6%	1 797	0.5%	843	0.4%	
Extra-EU	323 099		333 952		306 064		341 053		194 785		
% change			+ 3%		- 8%		+ 11%		- 3.7%		

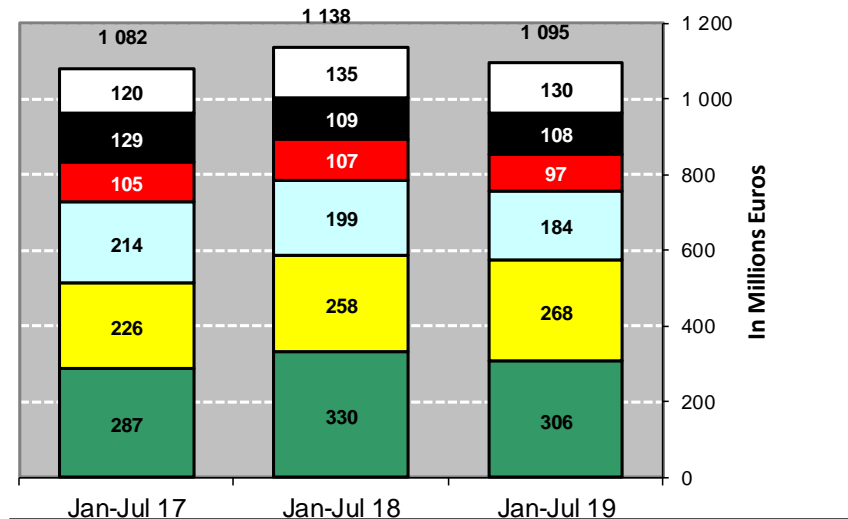
1 October 2019

EU imports of beef and live animals (2): Trade figures (COMEXT)

IMPORTS of Beef & Veal into EU (Tonnes cwe)



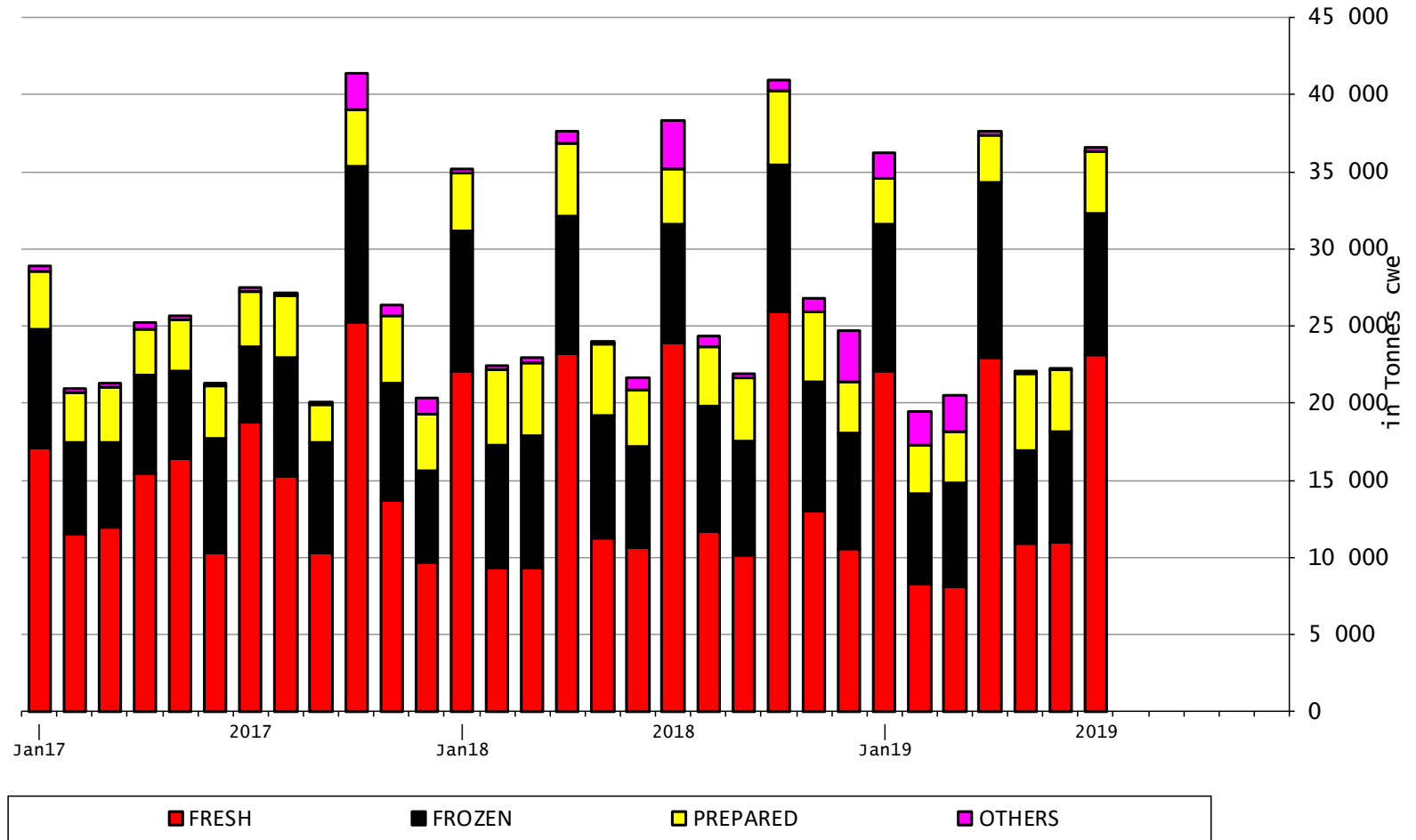
IMPORTS of Beef & Veal into EU (Million EUR)



TRADE

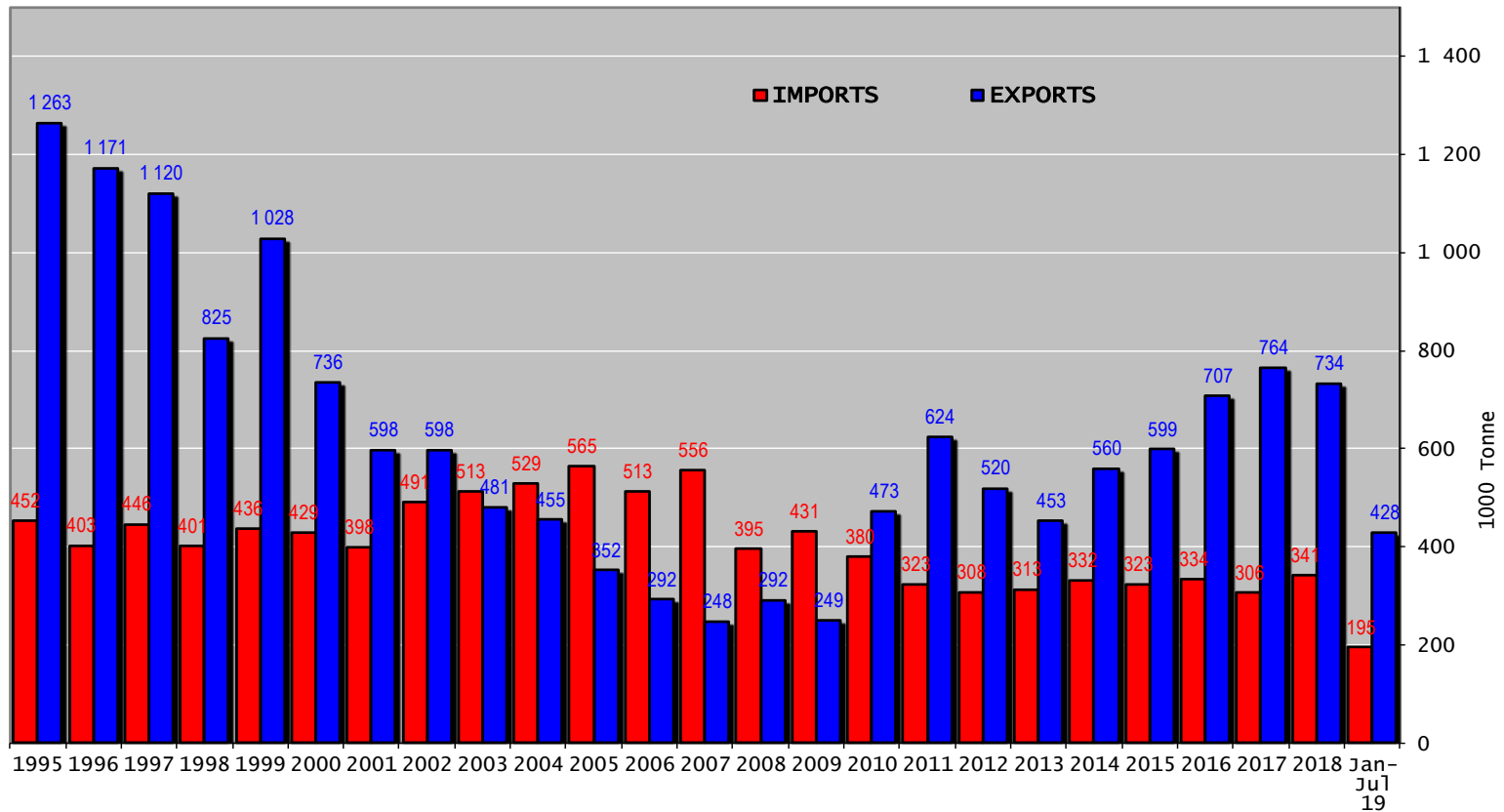
EU IMPORTS Beef Products

EU-28 Imports of BEEF products

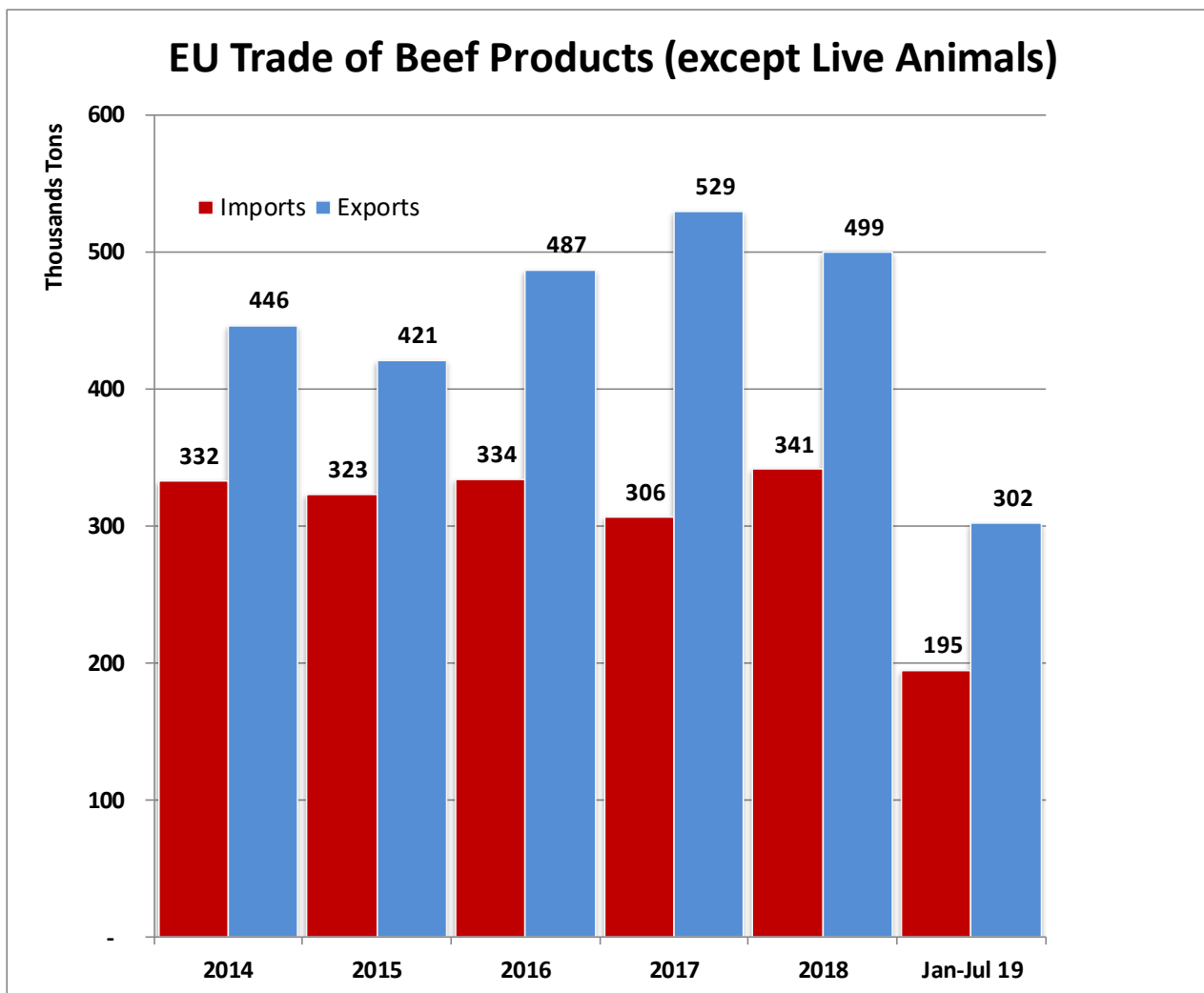


1 October 2019

Trade balance of beef and live animals

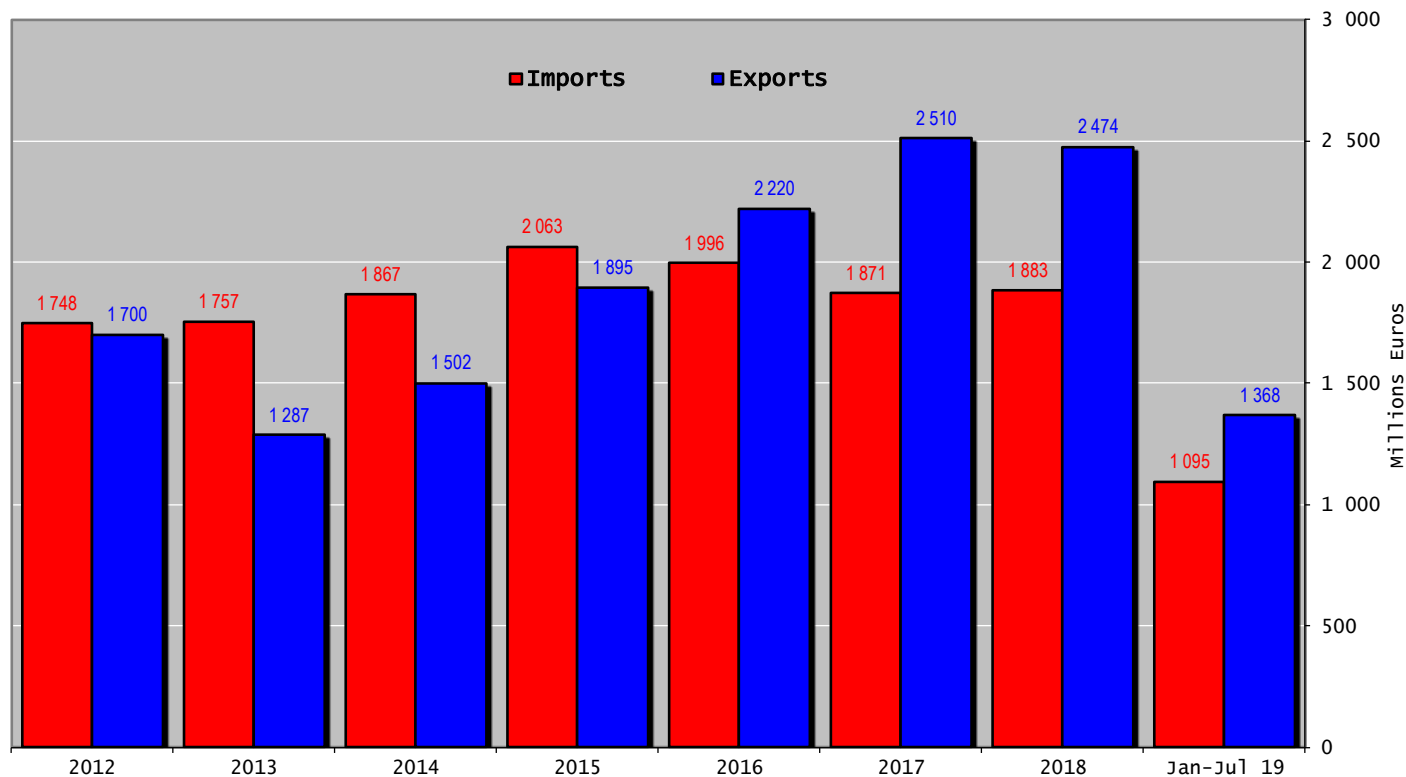


1 October 2019

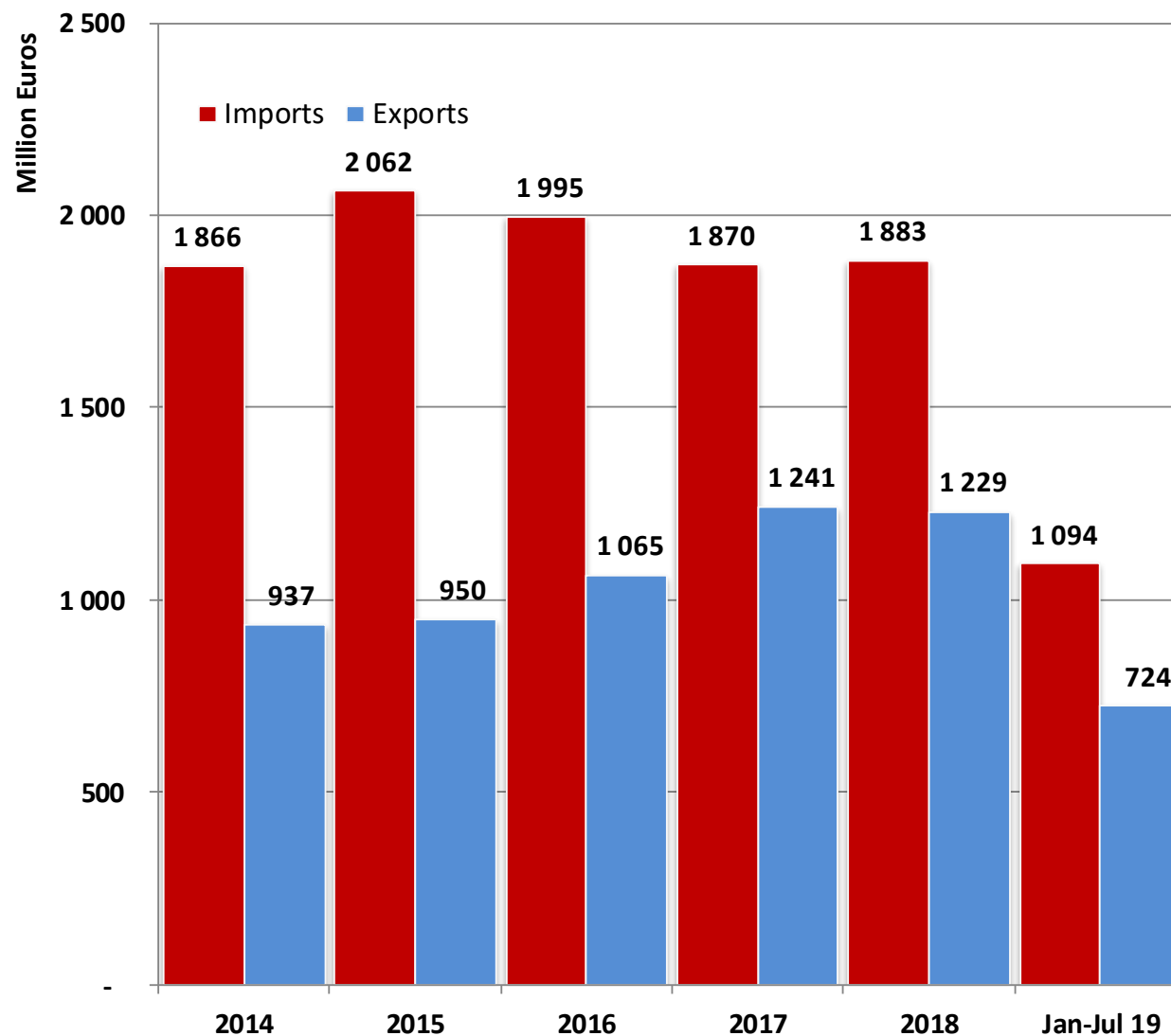


1 October 2019

Trade balance of beef and live animals

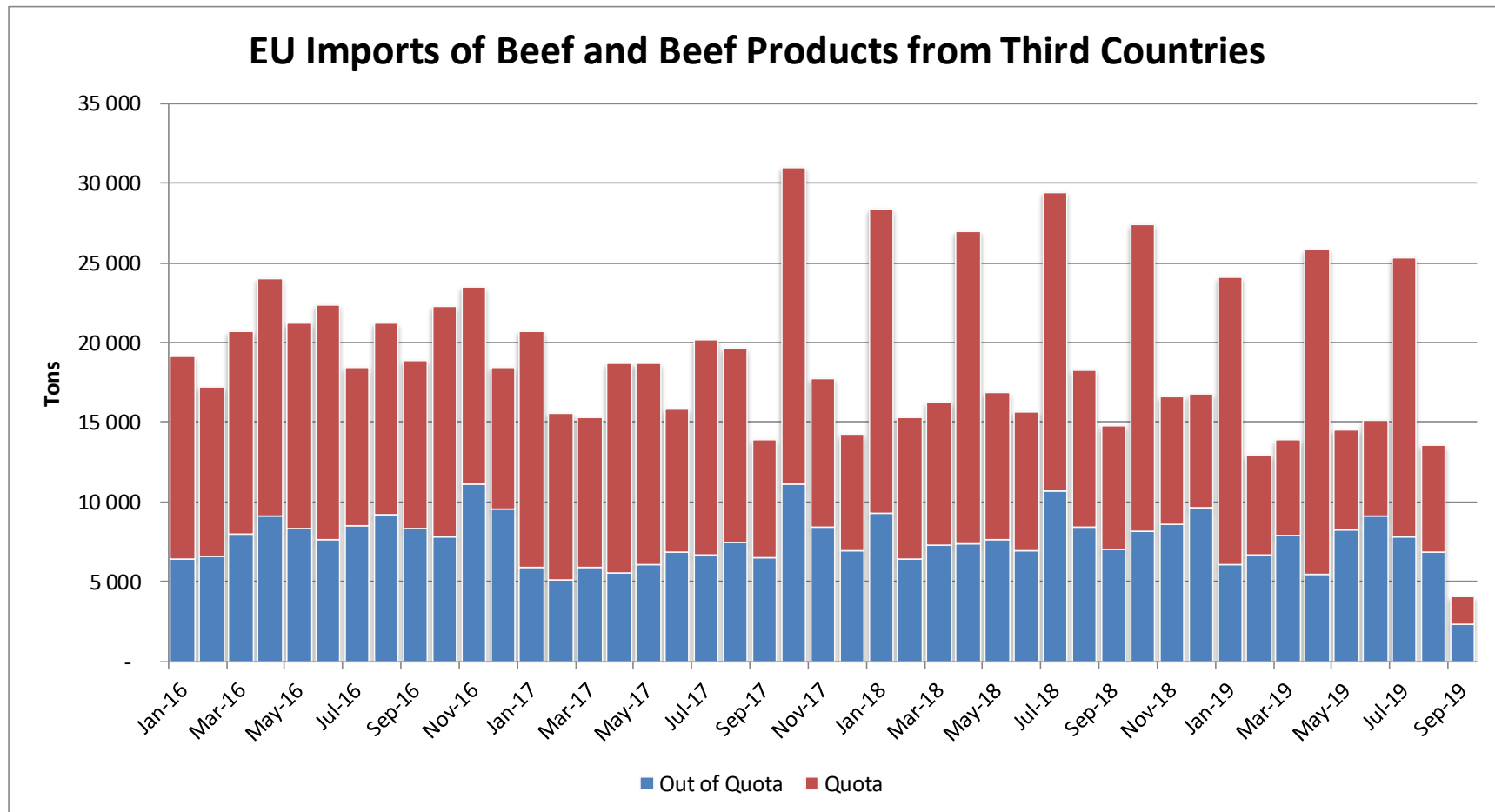


EU Trade of Beef Products (except Live Animals)



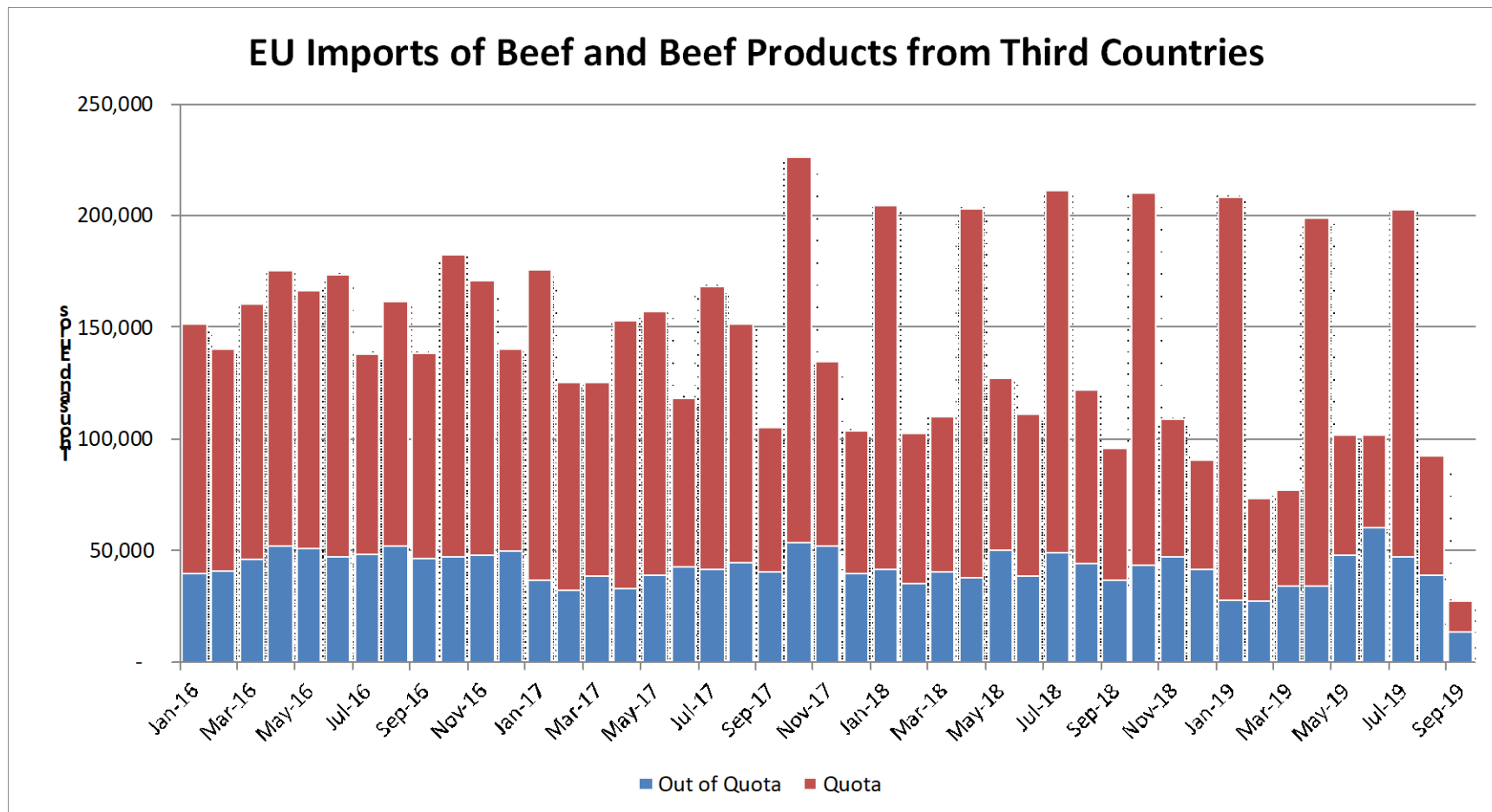
11 October 2019

Imports in and out of TRQs



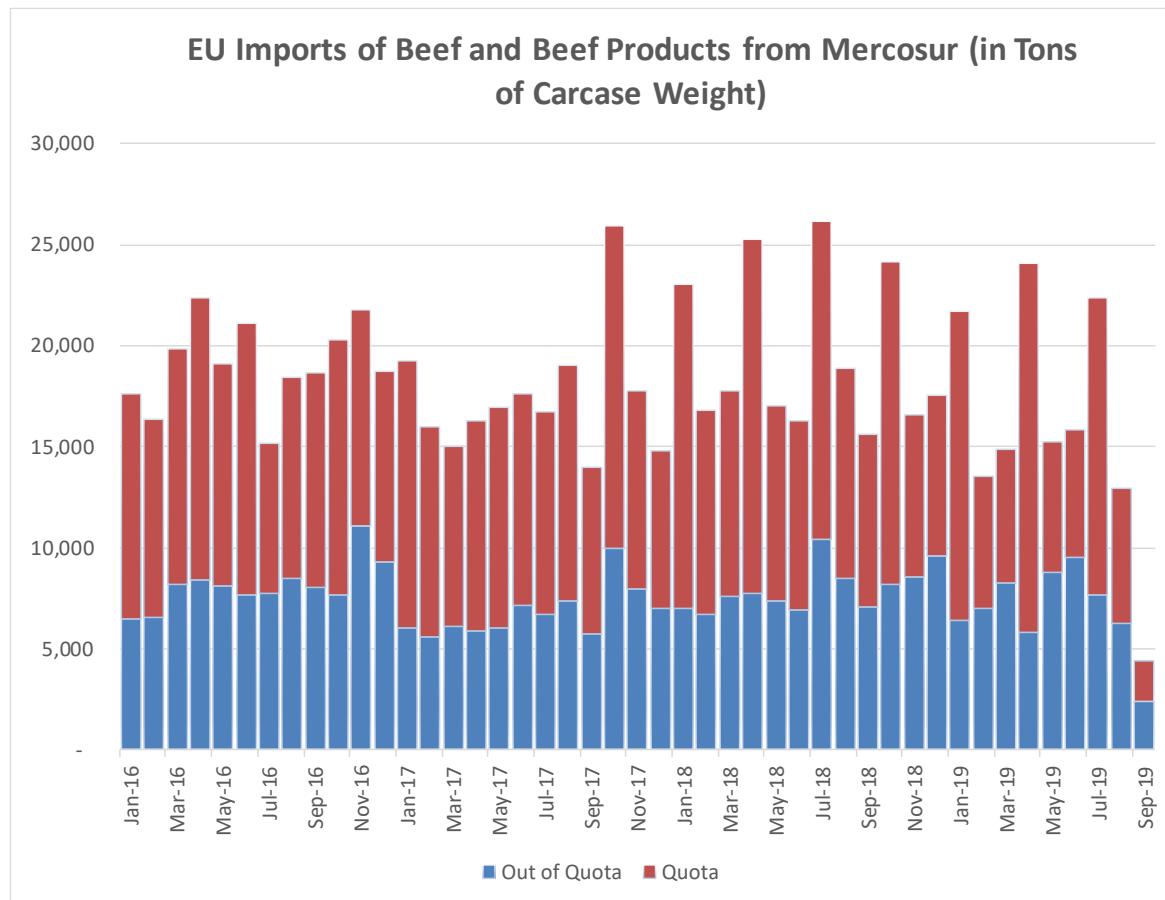
1 October 2019

Imports in and out of TRQs



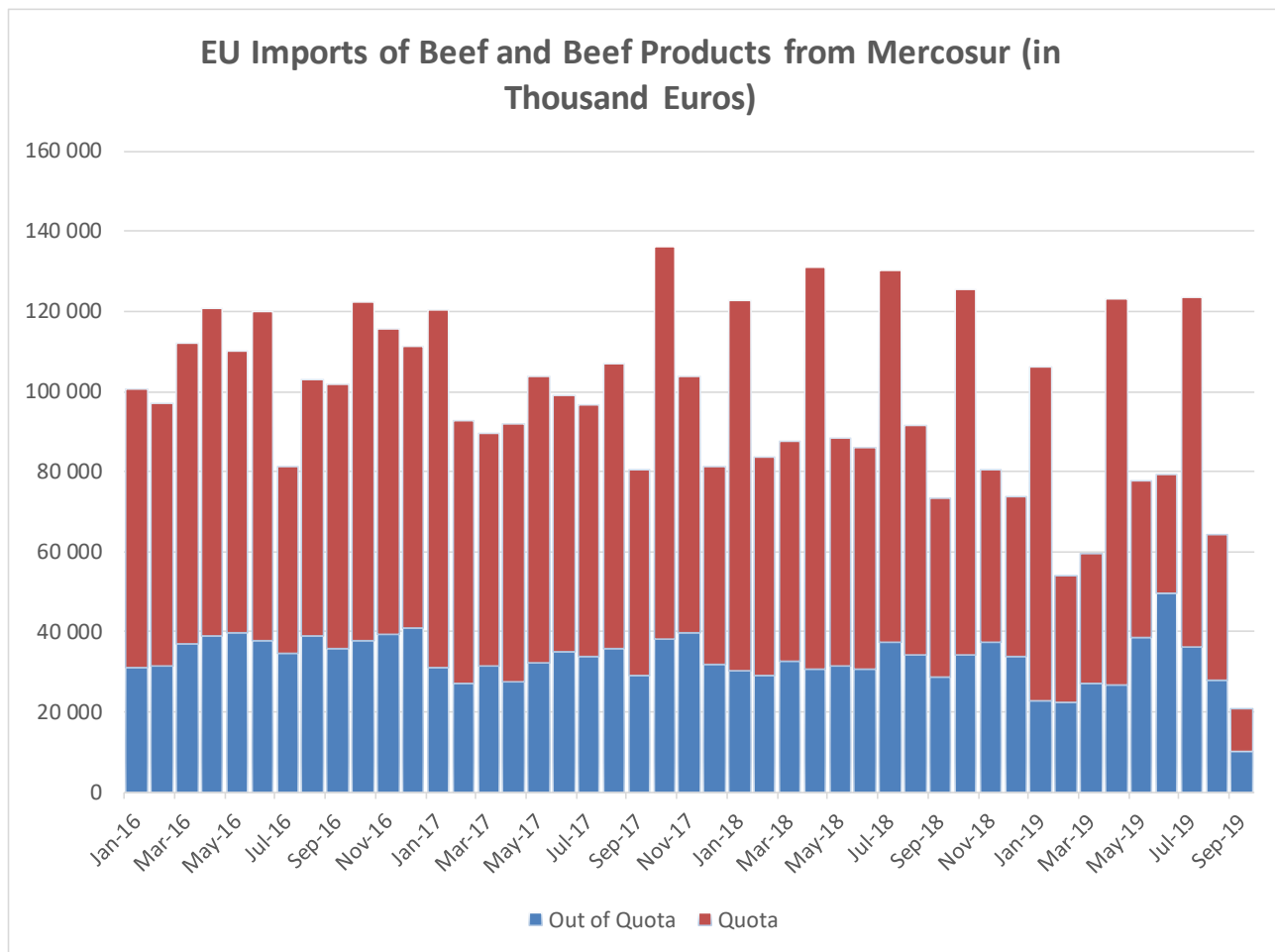
1 October 2019

Imports in and out of TRQs



1 October 2019

Imports in and out of TRQs



1 October 2019

High Quality Beef Import Quotas

Hilton Quota

Regulation (EU) N° 593/2013

		Quantity allocated (Tons)	2017/2018		2018/2019		2019/2020*	
			Use		Use		Use	
09.4001	Australia	2 250						
09.4004	Argentina	200	14.67	7.34%	11.05	5.53%		0.00%
09.4450	Argentina	29 500	28 091.29	95.22%	29 491.35	99.97%	7 231.60	24.51%
09.4451	Australia	7 150	5 333.48	74.59%	4 942.02	69.12%	952.07	13.32%
09.4452	Uruguay	6 376	6 363.24	99.80%	6 363.76	99.81%	1 072.93	16.83%
09.4453	Brazil	10 000	5 057.27	50.57%	4 147.19	41.47%	581.50	5.82%
09.4454	New Zealand	1 300	1 122.25	86.33%	980.60	75.43%	288.86	22.22%
09.4002	Canada/US	11 500	2 351.37	20.45%	3 883.04	33.77%	474.21	4.12%
09.4455	Paraguay	1 000	962.21	96.22%	935.41	93.54%	209.33	20.93%
Total Beef		66 826	49 281.11	73.75%	50 743.37	75.93%	10 810.50	16.18%
Total Buffalo		2 450	14.67	0.60%	11.05	0.45%	-	0.00%
Total		69 276	49 295.78	71.16%	50 754.42	73.26%	10 810.50	15.60%

* up to 31/08/2019

1 October 2019

High Quality Beef Import Quotas

Quota erga omnes

Regulation (EU) No 481/2012

	2015-Q3	2015-Q4	2016-Q1	2016-Q2	TOTAL
Period 2015-2016	11 952 185	11 851 187	11 535 011	12 664 673	48 003 056
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	99.19%	98.35%	95.73%	105.10%	99.59%

Available after transfer	12 050 000	12 147 815	12 346 627	12 861 617	
	99.19%	97.56%	93.43%	98.47%	

	2016-Q3	2016-Q4	2017-Q1	2017-Q2	TOTAL
Period 2016-2017	12 059 567	12 062 828	12 015 258	12 095 591	48 233 243
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	100.00%	100.00%	99.71%	100.00%	100.00%

Available after transfer	12 050 000	12 040 433	12 027 606	12 062 348	
	100.00%	100.00%	99.90%	100.00%	

	2017-Q3	2017-Q4	2018-Q1	2018-Q2	TOTAL
Period 2017-2018	12 051 815	11 102 282	11 161 480	10 859 149	45 174 725
Available	12 050 000	11 161 000	11 250 000	11 250 000	45 711 000
Use	100.00%	99.47%	99.21%	96.53%	98.83%

Available after transfer	12 050 000	11 159 185	11 308 718	11 338 520	
	100.00%	99.49%	98.70%	95.77%	

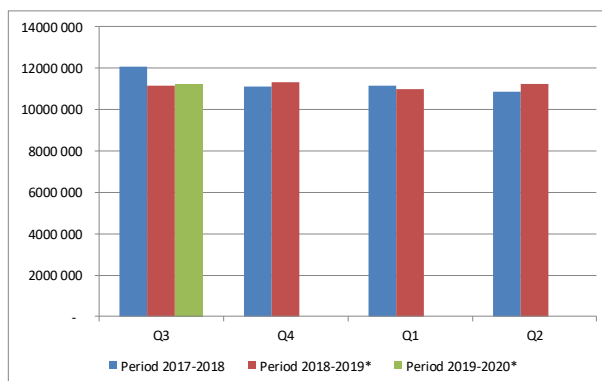
	2018-Q3	2018-Q4	2019-Q1	2019-Q2	TOTAL
Period 2018-2019*	11 164 832	11 319 134	10 972 635	11 255 802	44 712 403
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.24%	100.00%	97.53%	100.00%	99.36%

Available after transfer	11 250 000	11 335 168	11 180 866	11 527 365	
	99.24%	99.86%	98.14%	97.64%	

	2019-Q3	2019-Q4	2020-Q1	2020-Q2	TOTAL
Period 2019-2020*	11 247 566	-	-	-	11 247 566
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.98%				24.99%

Available after transfer	11 250 000				
	99.98%				

* Until 12.09.2019

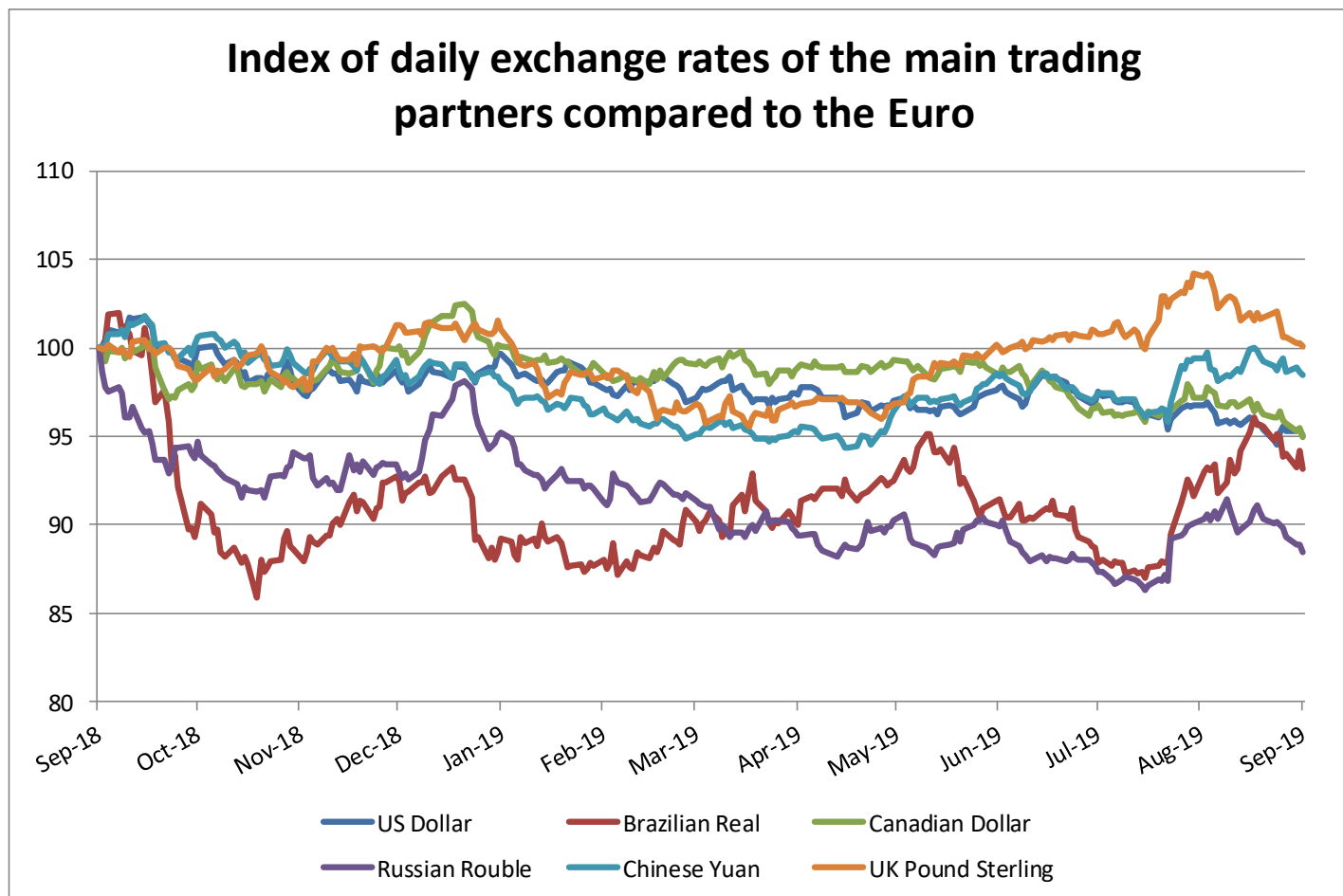


1 October 2019

WORLD BEEF MARKET

EXCHANGE RATE INDEX / Euro

Main Trading Partners



Source : ECB

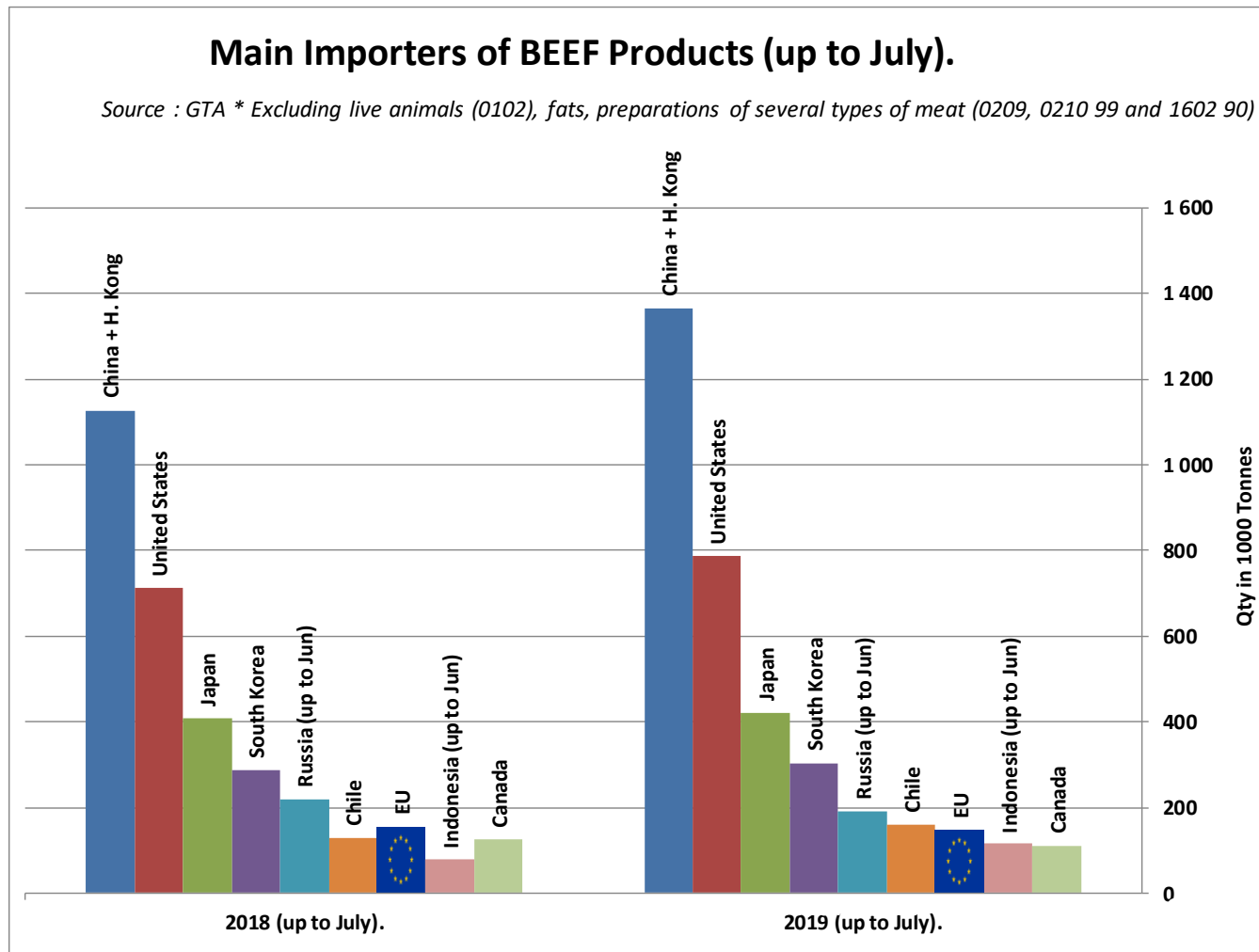
1 October 2019

WORLD BEEF MARKET

E.U. IMPORTS BEEF MAIN IMPORTERS

Source : GTA

* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



1 October 2019

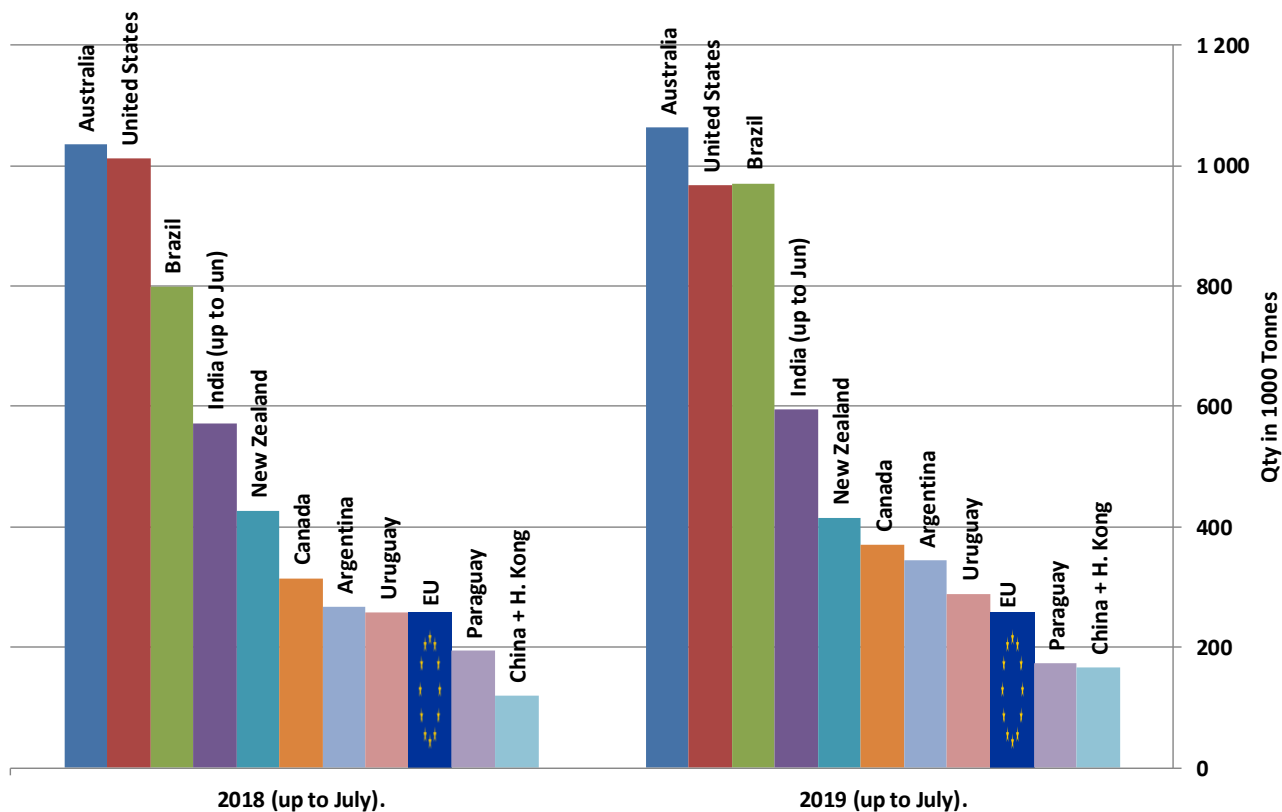
WORLD BEEF MARKET

E.U. EXPORTS BEEF MAIN EXPORTERS

Source : GTA * Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)

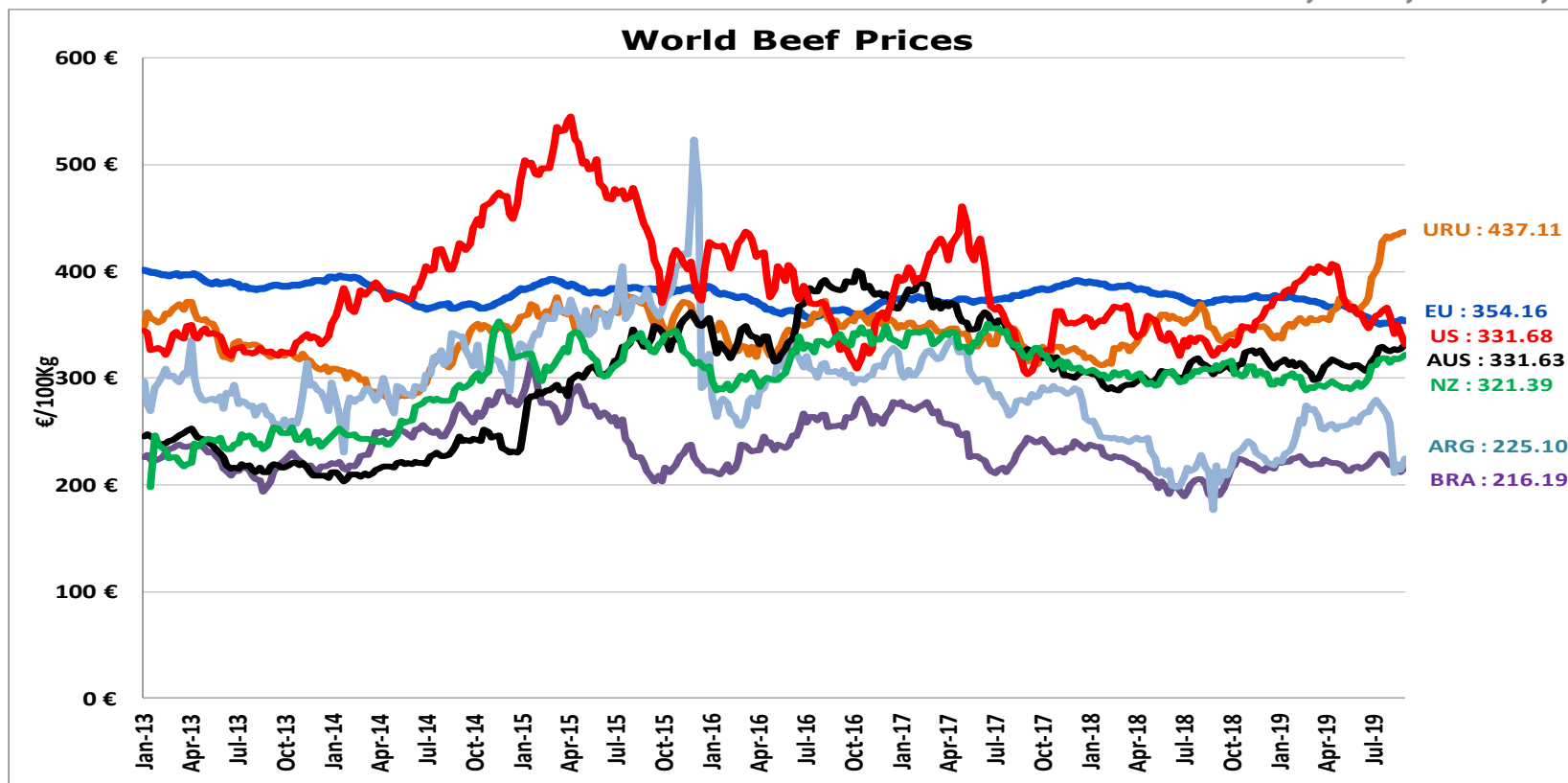
Main Exporters of BEEF Products (up to July).

Source : GTA * Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



WORLD BEEF MARKET

STEER PRICES EU, US, AUS, NZ



ECB <http://sdw.ecb.europa.eu/browse.do?node=2018794>
 US <https://www.marketnews.usda.gov/mnp/lis-home>
 AUS <http://statistics.mla.com.au/Report/RunReport/ae59d4ac-74e4-4c56-93bd-982a044d9760>
 UY <http://www.inac.gub.uy/innovaportal/v/11034/10/innova.front/indicadores-y-precios>
 ARG http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html
 BR <http://www.pecuaria.com.br/cotacoes.php>
 NZ http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html

1 October 2019

Tariff Rate Quotas

**Apportioned
between the
Union and the
UK**

**Non-apportioned
between the
Union and the UK**

**CIR (EU)
2019/386**

Hilton Quota: CIR (EU) No 593/2013

**Frozen beef quota for processing: CR
(EC) No 412/2008**

**Frozen bovine meat quota: CR (EC)
No 431/2008**

**High quality beef quota: CIR
(EU) No 481/2012**

Hilton quota (CIR (EU) No 593/2013)

TRQ order nr	Country	Quantity allocated (Tons)		EU-27 share
		EU-28	EU-27	
09.4001	Australia	2 250	1 405	62,4%
09.4004	Argentina	200	200	100%
09.4450	Argentina	29 500	29 389	99,6%
09.4451	Argentina	7 150	2 481	34,7%
09.4452	Uruguay	6 376	5 606	87,9%
09.4453	Brazil	10 000	8 951	89,5%
09.4454	New Zealand	1 300	846	65,1%
09.4002	Canada/US	11 500	11 481	99,8%
09.4455	Paraguay	1 000	711	71,1%

*Frozen beef quota for processing
(CR (EC) No 412/2008)*

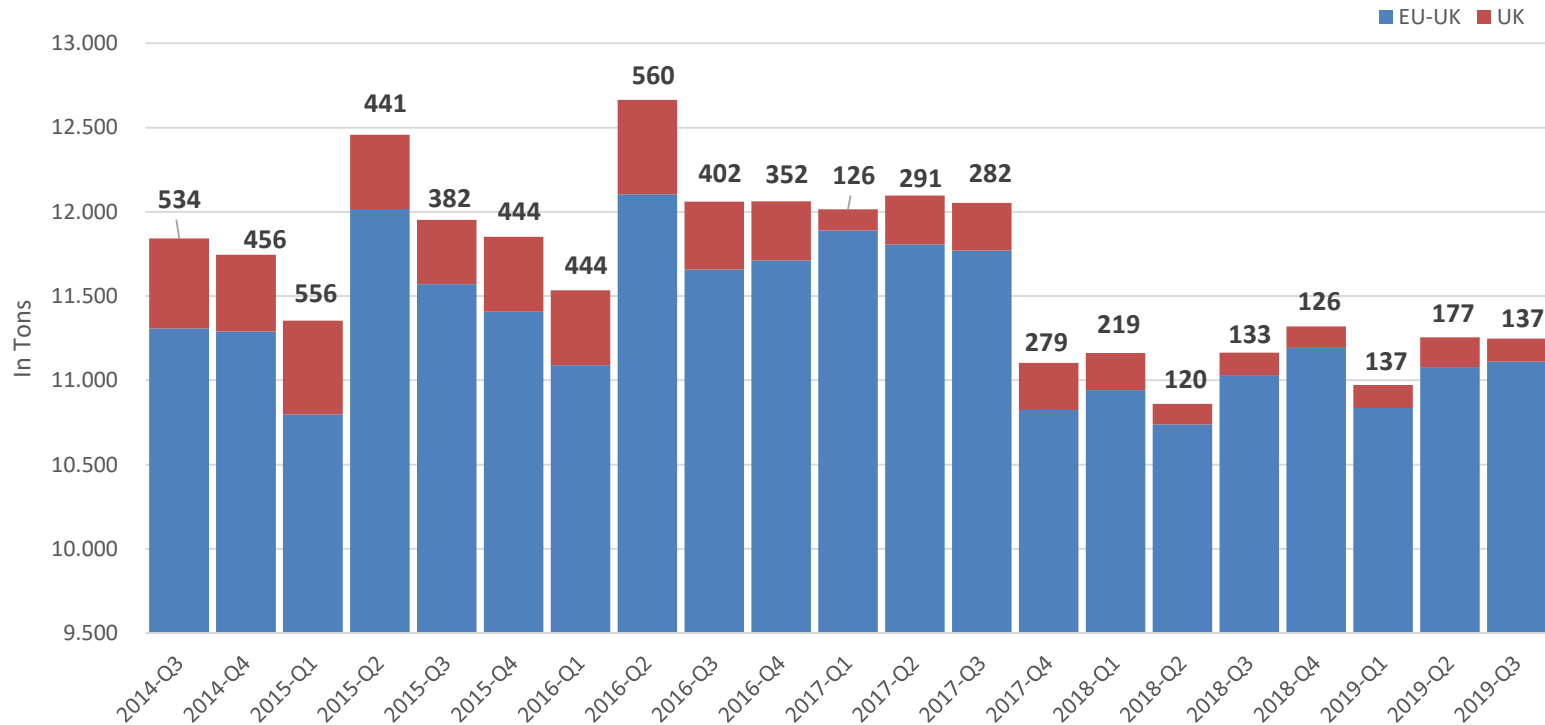
TRQ order nr	Quantity allocated (Tons)		EU-27 share
	EU-28	EU-27	
09.4057	50 000	15 443	30,9%
09.4058	13 703	4 233	30,9%

*Frozen bovine meat quota
(CR (EC) No 431/2008)*

TRQ order nr	Quantity allocated (Tons)		EU-27 share
	EU-28	EU-27	
09.4003	54 875	43 732	79,7%

High quality beef quota (CIR No 481/2012)

EU imports



THANK YOU VERY MUCH

More Information at:

EU Market Observatory

https://ec.europa.eu/agriculture/market-observatory/meat_en

And

Agri-FOOD data portal:

<http://agridata.ec.europa.eu/>