

# BEEF & VEAL MARKET SITUATION



Meat market observatory 6 June 2023

## LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION  
TOTAL BOVINE

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2022 2021	BOVINE < 1 Year				%Var 2022 2021	BOVINE 1-2 Year				%Var 2022 2021	BOVINE > 2 Year				%Var 2022 2021
	2019	2020	2021	2022		2019	2020	2021	2022		2019	2020	2021	2022		2019	2020	2021	2022	
BE	2 373	2 335	2 310	2 286	-1.1%	722	712	713	694	-2.7%	464	461	454	454	-0.0%	1 188	1 163	1 143	1 138	-0.5%
BG	527	589	611	579	-5.2%	100	112	121	108	-11.3%	58	71	67	69	+3.4%	369	406	423	402	-4.8%
CZ	1 367	1 340	1 359	1 390	+2.3%	411	405	408	407	-0.4%	299	295	296	314	+6.1%	657	640	655	669	+2.2%
DK	1 500	1 500	1 480	1 466	-0.9%	522	524	516	510	-1.2%	280	279	280	281	+0.4%	698	697	684	675	-1.3%
DE	11 640	11 302	11 040	10 997	-0.4%	3 485	3 405	3 355	3 308	-1.4%	2 751	2 639	2 569	2 600	+1.2%	5 403	5 258	5 116	5 089	-0.5%
EE	254	253	251	250	-0.5%	71	72	69	69	+0.3%	50	49	51	49	-3.7%	133	132	131	132	+0.4%
IE	6 560	6 529	6 649	6 552	-1.5%	1 962	2 057	2 108	1 995	-5.3%	1 741	1 708	1 775	1 810	+2.0%	2 856	2 765	2 766	2 746	-0.7%
EL	530	632	614	607	-1.2%	157	162	176	170	-3.5%	91	145	114	122	+7.7%	283	325	324	314	-3.0%
ES	6 600	6 636	6 576	6 456	-1.8%	2 529	2 541	2 319	2 487	+7.2%	857	853	1 016	786	-22.6%	3 214	3 242	3 240	3 182	-1.8%
FR	18 173	17 816	17 330	16 986	-2.0%	5 125	5 119	4 945	4 868	-1.6%	3 183	3 063	3 021	2 992	-1.0%	9 865	9 634	9 364	9 127	-2.5%
HR	420	423	428	422	-1.4%	151	146	156	149	-4.5%	107	111	107	112	+4.7%	162	166	165	161	-2.4%
IT	6 377	6 400	6 280	6 049	-3.7%	1 759	1 774	1 722	1 563	-9.2%	1 588	1 595	1 562	1 520	-2.7%	3 030	3 031	2 997	2 966	-1.0%
CY	74	83	85	81	-3.7%	25	27	27	25	-7.4%	12	14	15	15	-2.8%	38	42	43	42	-1.8%
LV	395	399	393	391	-0.5%	108	112	107	107	+0.4%	65	65	68	66	-3.3%	222	222	219	219	-0.1%
LT	635	630	629	642	+2.1%	167	169	166	173	+4.5%	132	129	135	130	-3.7%	336	332	328	339	+3.3%
LU	192	191	187	186	-0.6%	50	50	49	48	-2.1%	41	41	40	41	+0.1%	101	100	98	98	-0.1%
HU	909	933	910	894	-1.7%	258	266	269	258	-4.2%	193	195	153	159	+3.6%	458	472	487	477	-2.1%
MT	14	14	14	14	+1.3%	4	4	4	4	+1.6%	3	3	3	3	-3.3%	7	7	7	7	+3.3%
NL	3 721	3 691	3 705	3 751	+1.2%	1 528	1 510	1 519	1 536	+1.1%	440	465	482	496	+2.9%	1 752	1 716	1 704	1 719	+0.9%
AT	1 880	1 855	1 870	1 861	-0.5%	605	599	611	597	-2.3%	426	414	421	430	+2.1%	848	842	838	834	-0.5%
PL	6 262	6 279	6 379	6 448	+1.1%	1 748	1 735	1 802	1 929	+7.0%	1 757	1 800	1 915	1 699	-11.3%	2 758	2 744	2 662	2 821	+6.0%
PT	1 675	1 691	1 641	1 617	-1.4%	531	526	528	433	-18.0%	240	257	214	266	+24.0%	903	909	899	919	+2.2%
RO	1 923	1 875	1 827	1 825	-0.1%	400	369	347	346	-0.4%	223	225	222	222	+0.0%	1 300	1 281	1 258	1 258	-0.0%
SI	483	486	483	465	-3.7%	151	153	157	149	-4.9%	136	133	131	130	-0.6%	197	199	195	186	-4.8%
SK	432	442	434	426	-1.8%	122	126	125	122	-2.1%	83	87	82	82	-0.3%	227	229	228	222	-2.3%
FI	841	835	830	822	-1.0%	287	292	287	283	-1.3%	205	199	205	203	-1.1%	349	344	338	336	-0.6%
SE	1 405	1 391	1 390	1 391	+0.0%	453	464	460	461	+0.2%	339	323	334	333	-0.4%	613	603	596	597	+0.2%
EU	77 161	76 551	75 705	74 856	-1.1%	23 431	23 428	23 065	22 798	-1.2%	15 764	15 621	15 732	15 382	-2.2%	37 966	37 503	36 908	36 675	-0.6%
UK	9 459					2 860					2 335					4 264				

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2021 AND 2022

## LIVESTOCK

## DECEMBER SURVEY

EU EVOLUTION  
COWS

Dec 1000 Hd	TOTAL COWS					%Var 2022 2021	DAIRY COWS					%Var 2022 2021	OTHER COWS					%Var 2022 2021
	2019	2020	2021	2022			2019	2020	2021	2022			2019	2020	2021	2022		
BE	939	921	917	913	-0.4%		538	538	537	544	+1.2%		401	383	379	370	-2.6%	
BG	343	382	397	377	-5.1%		227	242	230	213	-7.7%		116	140	166	164	-1.5%	
CZ	570	560	574	579	+0.9%		361	357	362	357	-1.6%		209	203	212	223	+5.2%	
DK	645	646	635	627	-1.3%		563	565	559	556	-0.5%		83	80	76	70	-7.9%	
DE	4 651	4 548	4 445	4 420	-0.6%		4 012	3 921	3 833	3 810	-0.6%		640	626	612	610	-0.3%	
EE	116	116	115	115	-0.4%		85	84	84	84	+0.1%		31	32	31	31	-1.6%	
IE	2 383	2 379	2 395	2 372	-1.0%		1 426	1 456	1 505	1 510	+0.3%		957	923	890	862	-3.1%	
EL	242	210	213	207	-3.0%		86	90	91	88	-3.8%		156	120	122	119	-2.5%	
ES	2 881	2 909	2 900	2 889	-0.4%		813	811	809	810	+0.2%		2 068	2 099	2 091	2 079	-0.6%	
FR	7 505	7 379	7 204	7 020	-2.6%		3 491	3 406	3 322	3 231	-2.7%		4 014	3 974	3 882	3 790	-2.4%	
HR	142	144	142	138	-2.8%		130	110	102	79	-22.5%		12	34	40	59	+47.5%	
IT	2 237	2 243	2 193	2 348	+7.1%		1 876	1 871	1 844	1 865	+1.1%		362	372	349	483	+38.6%	
CY	35	40	40	38	-3.5%		35	39	39	38	-1.6%		0	0	1	0	-100.0%	
LV	195	196	193	191	-1.0%		138	136	131	128	-2.6%		56	60	61	63	+2.4%	
LT	299	295	290	291	+0.4%		241	233	225	224	-0.5%		58	62	65	67	+3.4%	
LU	79	78	78	77	-0.5%		54	54	55	55	+1.4%		25	24	23	22	-4.9%	
HU	412	414	423	421	-0.4%		243	247	281	278	-1.1%		169	167	142	143	+0.8%	
MT	6	6	6	6	+3.4%		6	6	6	6	+4.3%		0	0	0	0	-13.6%	
NL	1 633	1 612	1 599	1 614	+0.9%		1 590	1 569	1 554	1 570	+1.0%		43	43	45	44	-2.2%	
AT	720	715	712	708	-0.5%		524	525	526	551	+4.6%		195	191	186	158	-15.0%	
PL	2 406	2 391	2 289	2 172	-5.1%		2 167	2 126	2 035	2 037	+0.1%		239	266	254	135	-47.0%	
PT	731	739	739	726	-1.8%		234	233	230	224	-2.5%		497	507	509	502	-1.4%	
RO	1 166	1 145	1 116	1 115	-0.1%		1 139	1 122	1 082	1 081	-0.1%		27	23	34	34	+0.6%	
SI	166	167	165	157	-4.8%		101	99	101	93	-7.6%		65	68	65	64	-0.4%	
SK	192	192	191	188	-1.7%		126	122	120	116	-3.4%		66	69	71	72	+1.2%	
FI	318	316	311	306	-1.4%		259	256	249	243	-2.2%		59	61	62	63	+2.0%	
SE	500	499	497	496	-0.1%		301	304	300	298	-0.6%		198	194	197	199	+0.7%	
EU	31 513	31 241	30 778	30 512	-0.9%		20 766	20 522	20 213	20 088	-0.6%		10 748	10 718	10 565	10 424	-1.3%	
UK	3 337						1 867						1 470					

Source : EStat Newcronos

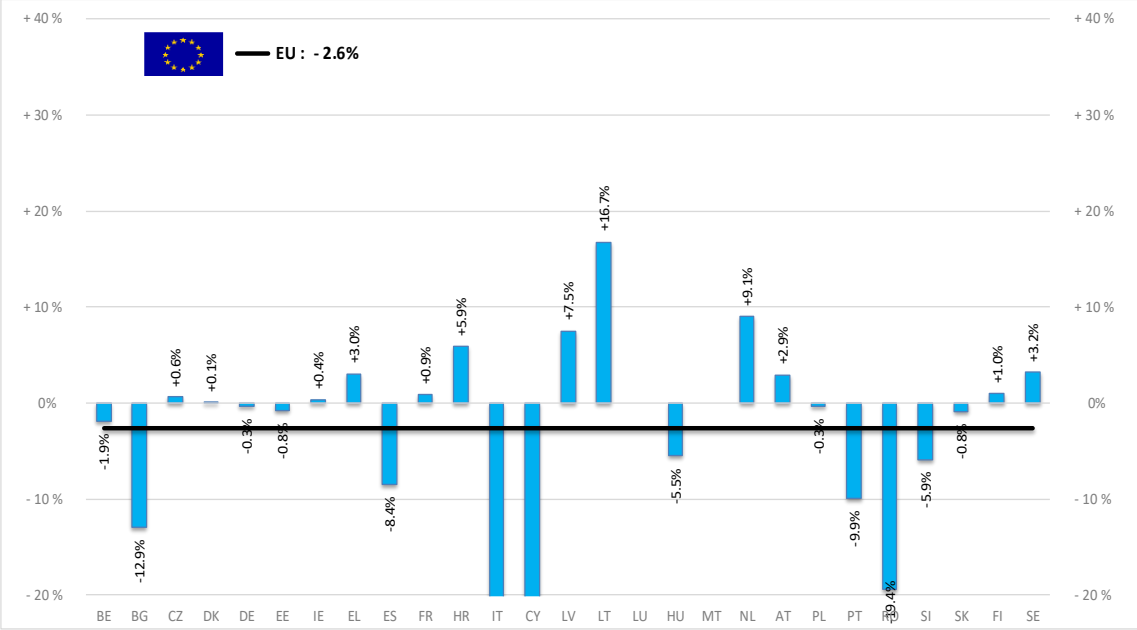
EU %Var is calculated considering only countries available in 2021 AND 2022

# PRODUCTION % EVOLUTION

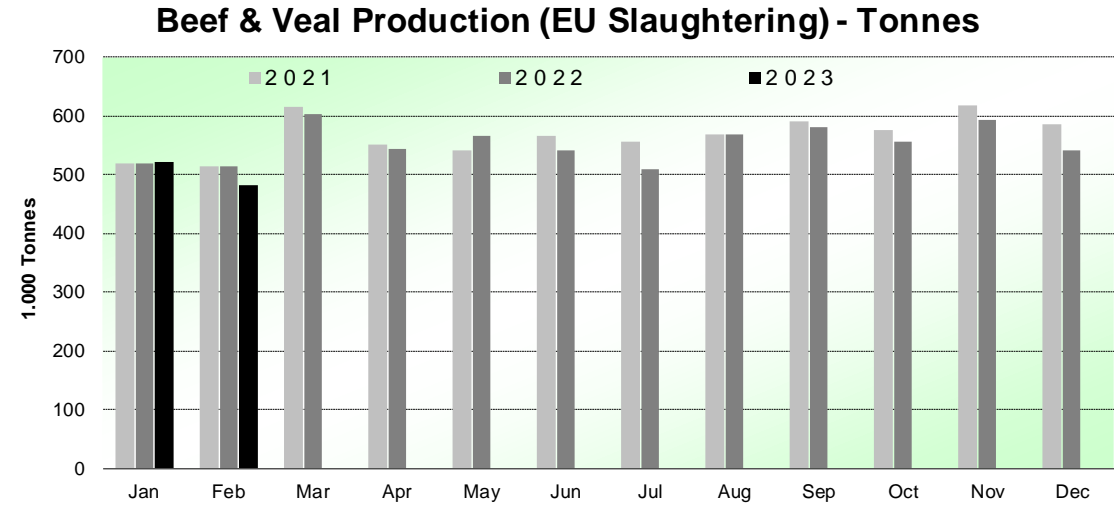
HEADS	Jan-Feb 23/22	TONNES	Jan-Feb 23/22
	EU		EU
Bull	-2.0%	Bull	-4.0%
Bullock	+2.0%	Bullock	+0.2%
Cow	+0.4%	Cow	+0.4%
Heifer	-0.9%	Heifer	-4.7%
Calve	-1.1%	Calve	-3.4%
Young cattle	-4.0%	Young cattle	-6.4%
Meat of bovine animals	-0.9%	Meat of bovine animals	-2.6%

Estimates for last month of period :

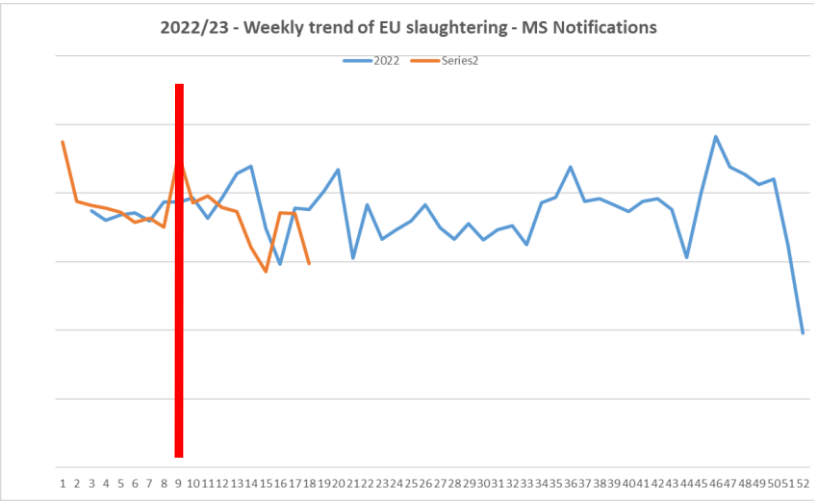
Estimates for last month of period :



Source : EStat - Newcronos



Source : EStat-Newcronos



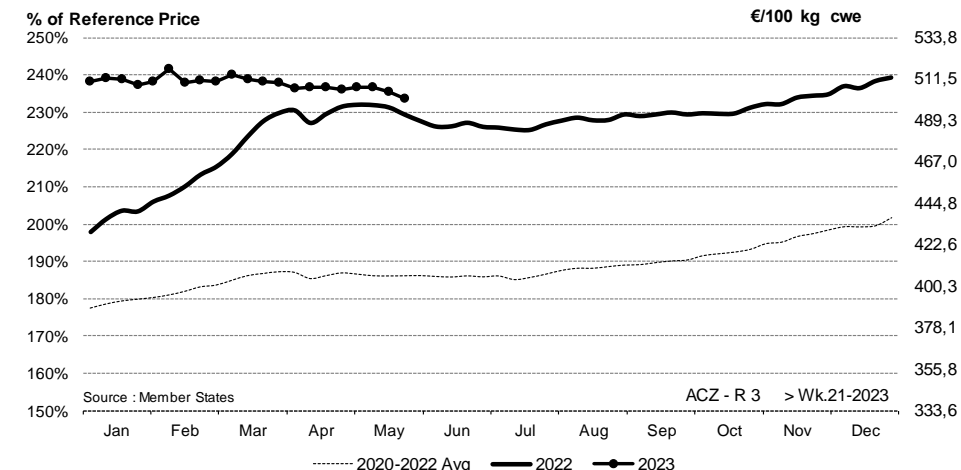
Sources : Member State notifications – Reg.2017/1185

# PRICES CARCASSES

# EVOLUTION A/C/Z.R3

EU Prices week		21	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	500.7	€/100 kg	- 0.8%	- 1.0%	+ 1.6%
	Young Bovines (Z)	515.8		- 0.6%	- 0.6%	+ 7.2%
	Young Bulls (A)	490.5		- 1.0%	- 1.1%	+ 0.5%
	Steers (C)	536.2		- 0.4%	- 0.8%	+ 0.4%
	Cows (D)	430.3		- 0.3%	- 0.5%	- 6.5%
	Heifers (E)	516.1		- 0.4%	- 0.9%	+ 2.0%
	Calves slaughtered <8M	626.2		- 1.5%	- 4.0%	+ 6.7%
Live Animals	Male Calves Dairy Type	139.7	€/head	+ 2.1%	+ 4.4%	+ 12.2%
	Male Calves Beef Type	275.8		+ 1.7%	+ 3.4%	+ 6.6%
	Young Store Cattle	3.33	€/kg	+ 0.1%	- 0.2%	+ 5.7%
	Yearling Male Store Cattle	3.70		- 1.0%	- 1.0%	- 2.6%
	Yearling Female Store Cattle	2.94		- 0.5%	- 0.4%	- 2.9%

ACZ - R 3 > Wk.21-2023



Price in week 21 : 500,76

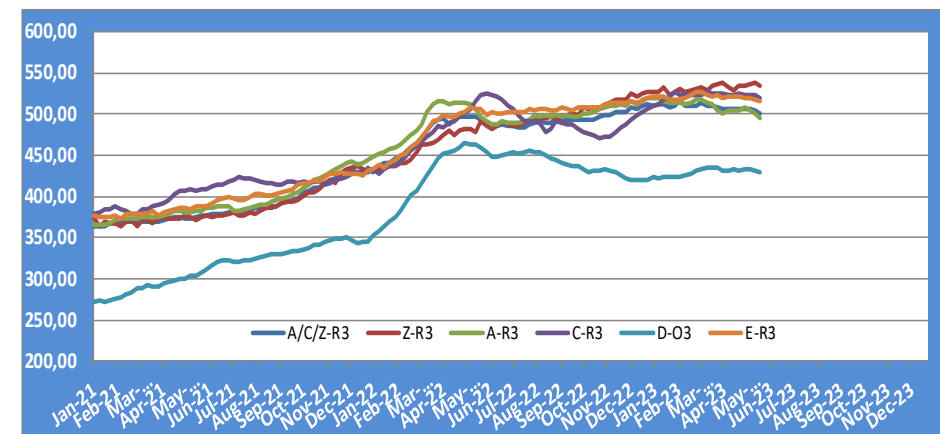
% change y/y : + 1,63%

% Ref. Price in wk 0 : 225,2%

Average price in avril 2023 : 506,89

% change y/y : + 2,77%

## EU EVOLUTION ALL CAT GLOBAL VIEW

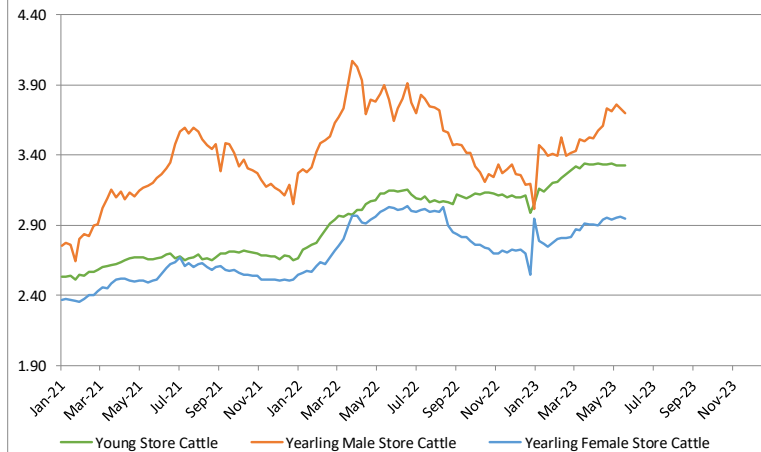


Sources : MSs notifications (Regulation (EU) 1182/2017 and 1184/2017)

# PRICES LIVE BOVINES AND CALVES

Store cattle (€/100 kg live weight)

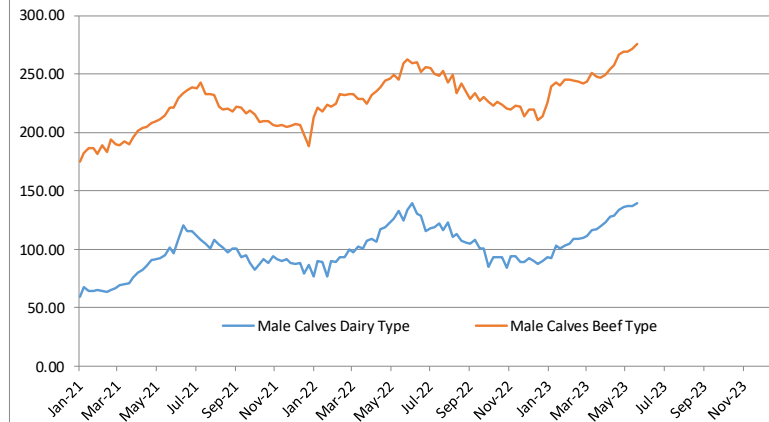
Young Store Cattle Prices



Young Store Cattle Price in	Week 21	3.33	Yearling Male Store Cattle Price	3.70
	Change y/y	+5.7%	Change y/y	-2.6%
Yearling Female Store Cattle Price		2.94		
	Change y/y	-2.9%		

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

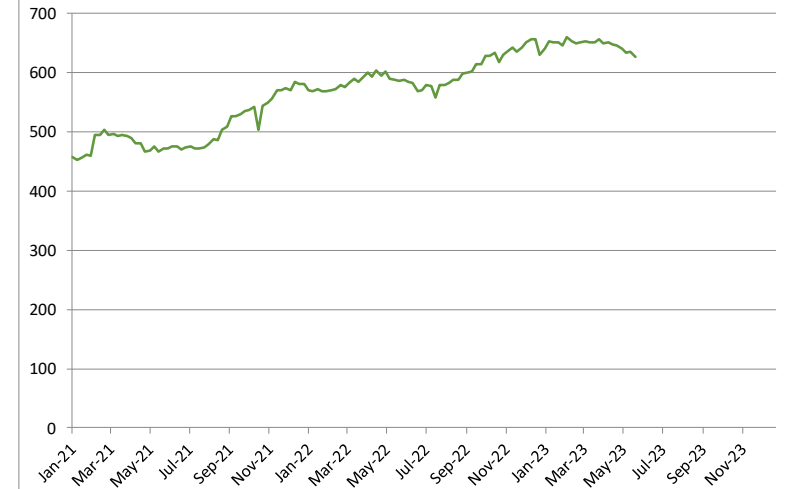
Male Rearing Calves Prices



Male Rearing Calves Beef type		Male Rearing Calves Dairy type	
Price in Week 21	275.85	Price in Week 21	139.76
Change y/y	+6.6%	Change y/y	+12.2%

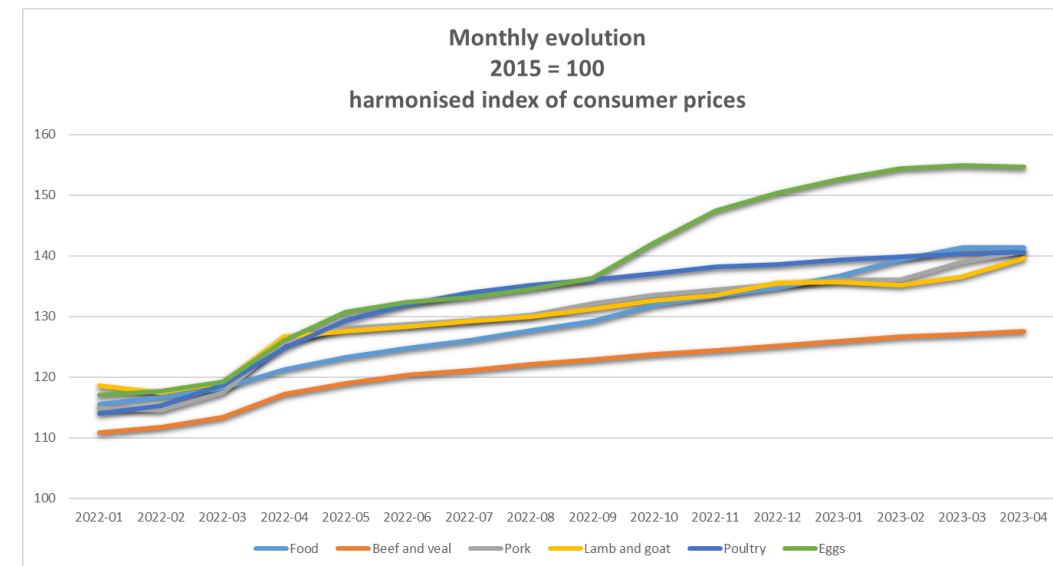
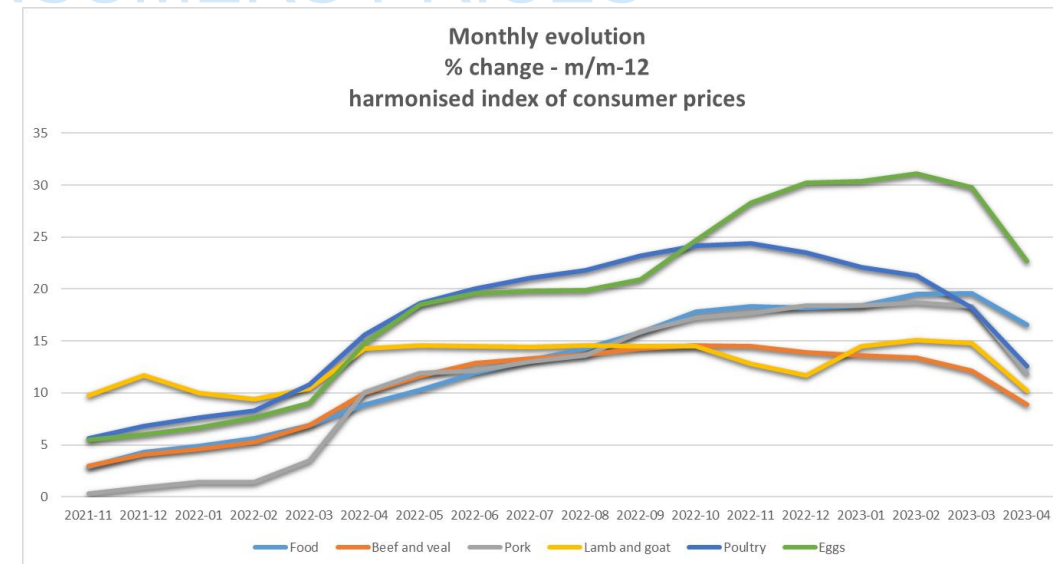
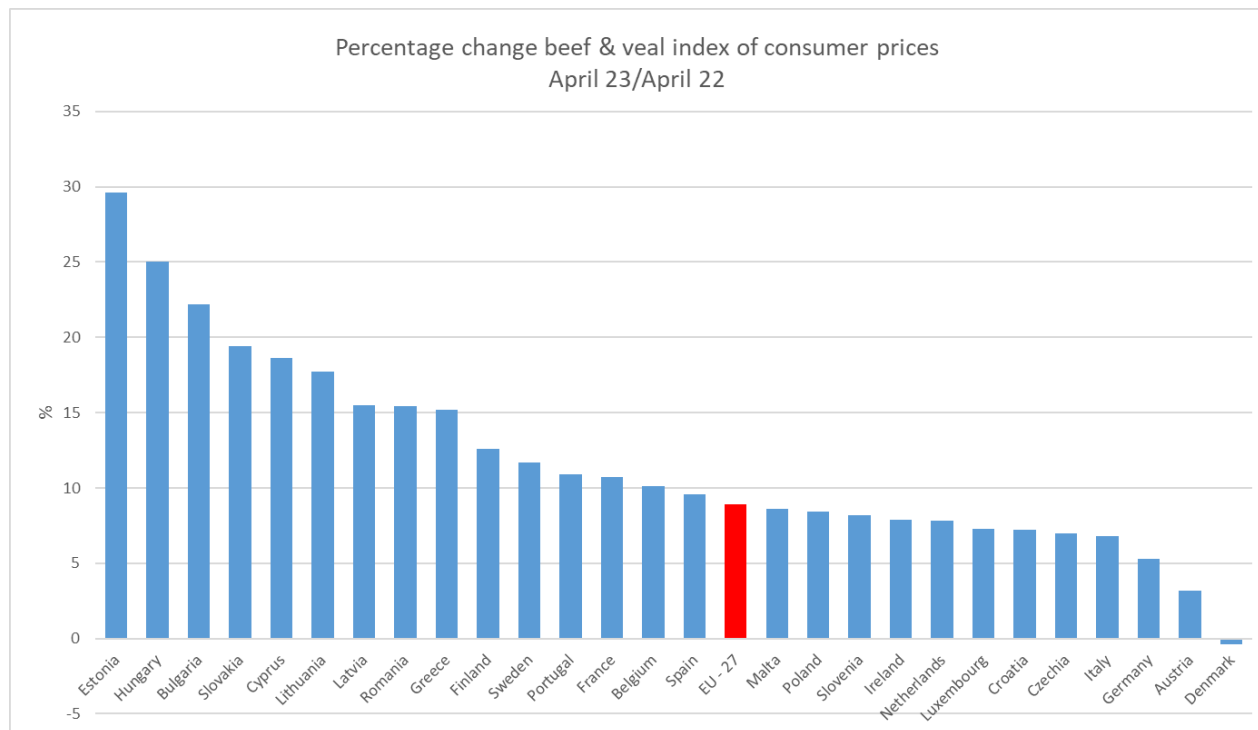
Calves slaughtered less than 8 months  
(€/100 kg cw)

Calves Slaughtered before the Age of 8 Months



Price in Week 21	626.23 € / 100 kg of carcasse weight
Change y/y	+6.7%

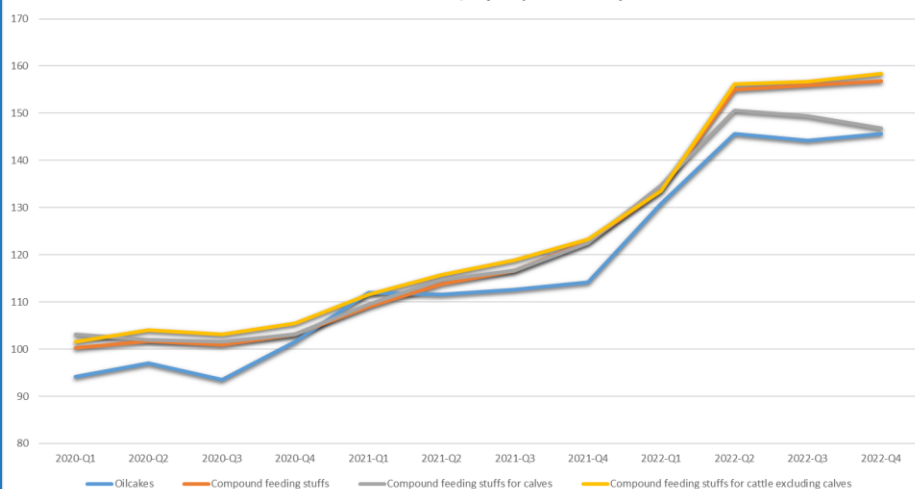
# HARMONISED INDEX OF CONSUMERS PRICES



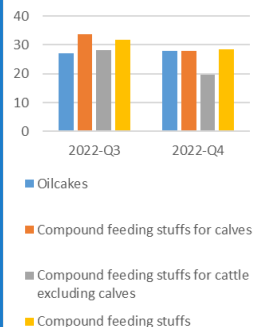


# INPUT PRICES – QUARTERLY DATA

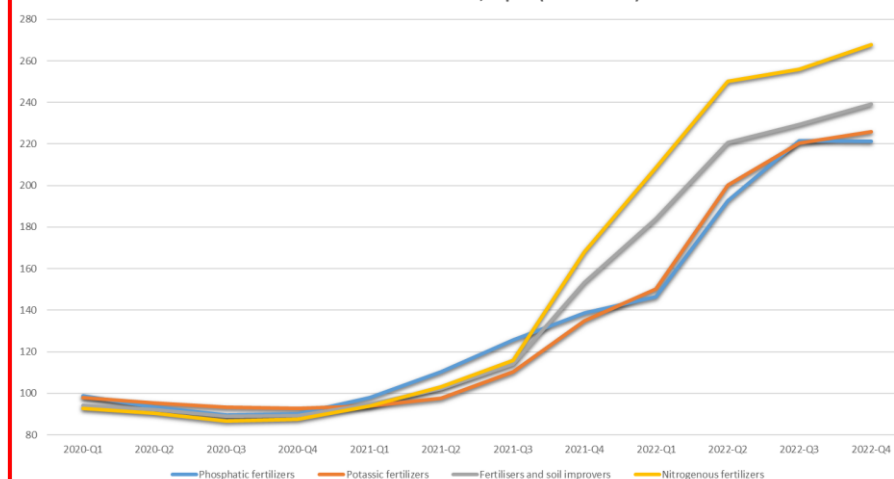
EU -27  
Feed Price indices, input (2015 = 100)



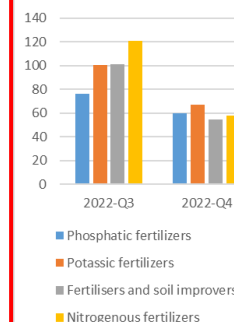
EU -27  
Percentage change  
feed price Q3 and Q4  
2022/2021



EU -27  
Fertilisers Price indices, input (2015 = 100)



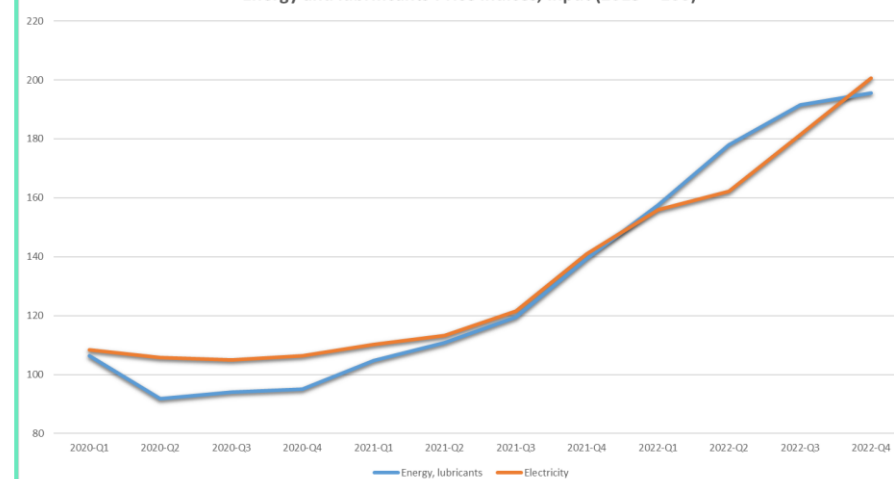
EU -27  
Percentage change  
fertilisers price Q3  
and Q4 2022/2021



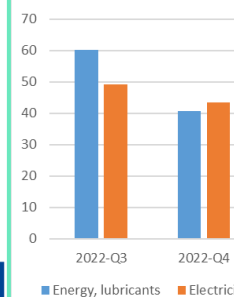
- Feed prices stabilised in the 2<sup>nd</sup> half of 2022, 20/30% higher that previous year
- Fertilisers prices seen the highest increases, in particular nitrogen fertilisers
- Energy prices 40% above 2021

Source - EUROSTAT

EU -27  
Energy and lubricants Price indices, input (2015 = 100)

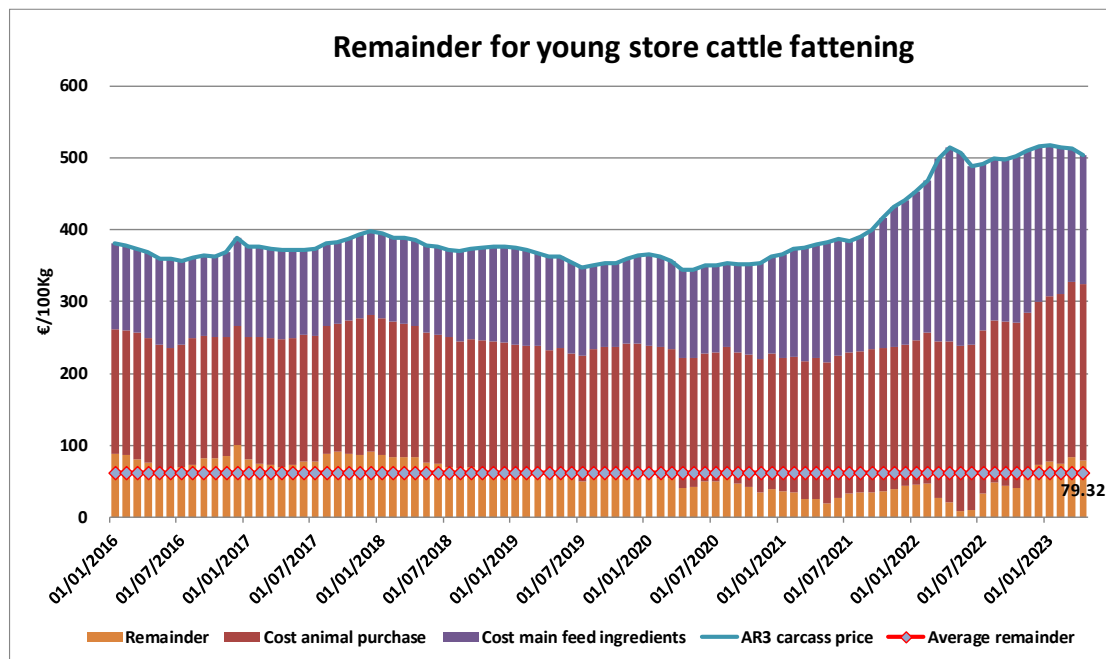
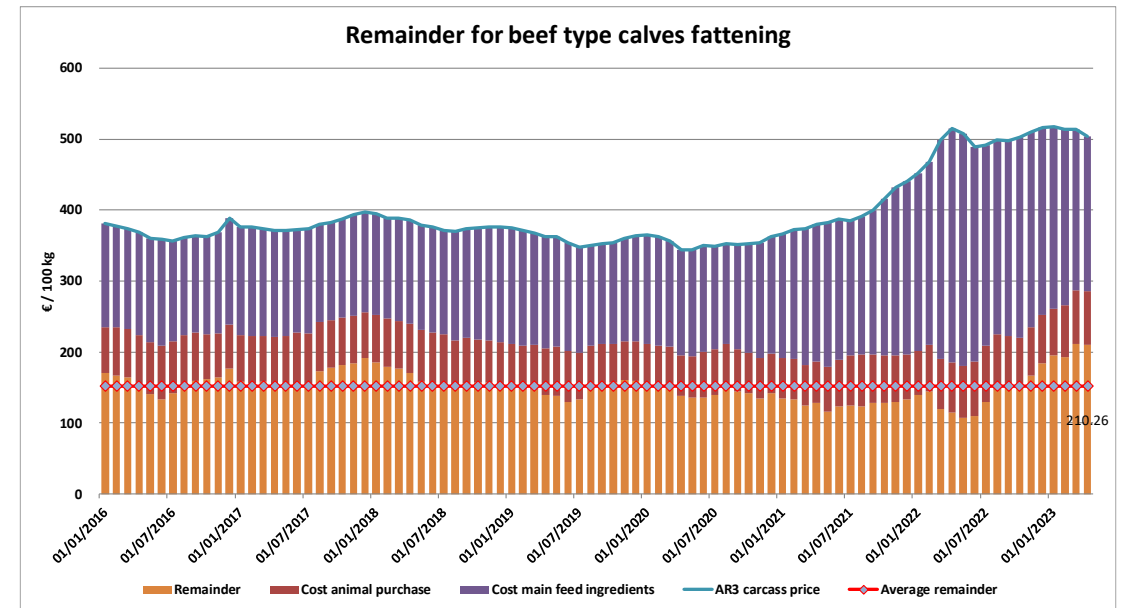
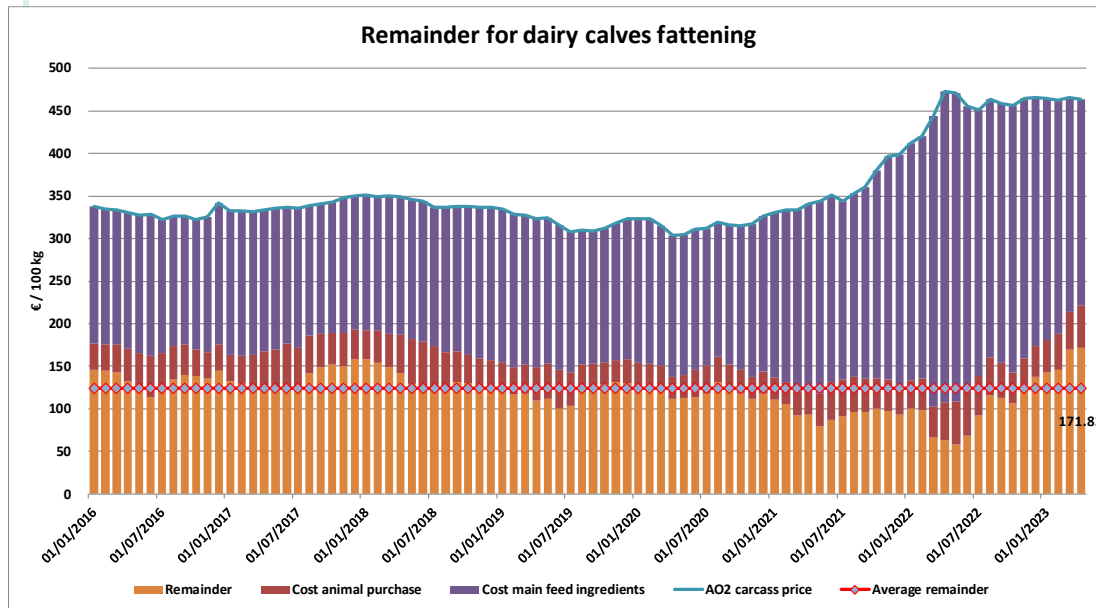


EU -27  
Percentage change  
energy and  
lubricants price Q3  
and Q4 2022/2021





# REMAINDERS



# TRADE

# EU EXPORTS

## Beef & Live Animals

### EU Exports of Beef and Live Animals (excluding fats): Trade figures (COMEXT – tonnes cwe)

*In Tons of Carcase Weight*

Destinations	2021		2022		Jan to Feb 2023		Compared to Jan to Feb 2022
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	344.634	33,4%	360.535	38,5%	58.060	41,8%	+0,2%
Israel	66.022	6,4%	63.598	6,8%	11.569	8,3%	+6,7%
Turkey	14.953	1,5%	13.452	1,4%	6.427	4,6%	+++
Bosnia-Herz.	40.504	3,9%	38.801	4,1%	5.189	3,7%	+6,4%
Ivory Coast	29.187	2,8%	29.879	3,2%	5.053	3,6%	-2,9%
Ghana	47.618	4,6%	31.762	3,4%	4.716	3,4%	-12,6%
Switzerland	28.717	2,8%	25.004	2,7%	3.857	2,8%	-8,3%
Hong Kong	44.769	4,3%	10.494	1,1%	3.616	2,6%	+60,9%
Algeria	24.111	2,3%	25.459	2,7%	3.091	2,2%	-22,9%
Kosovo	16.478	1,6%	17.086	1,8%	2.472	1,8%	+12,3%
Canada	20.670	2,0%	19.795	2,1%	2.159	1,6%	-41,0%
Other Destinations	353.310	34,3%	301.194	32,1%	32.795	23,6%	-35,2%
Extra-EU	1.030.975		937.059		139.003		-8,3%
% Change				-9,1%			

*In Thousand Euros*

	2021		2022		Jan to Feb 2023		Compared to Jan to Feb 2022
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	1.492.368	38,4%	1.788.830	41,7%	298.698	45,0%	+10,8%
Israel	328.295	8,4%	377.934	8,8%	72.686	11,0%	+25,5%
Turkey	86.382	2,2%	96.786	2,3%	45.515	6,9%	+++
Bosnia-Herz.	126.443	3,3%	161.208	3,8%	22.185	3,3%	+19,4%
Ivory Coast	25.645	0,7%	25.506	0,6%	4.309	0,6%	+5,3%
Ghana	47.987	1,2%	35.528	0,8%	4.801	0,7%	-19,9%
Switzerland	171.272	4,4%	188.978	4,4%	26.401	4,0%	-4,6%
Hong Kong	118.737	3,1%	33.178	0,8%	5.398	0,8%	-7,0%
Algeria	111.646	2,9%	171.402	4,0%	22.885	3,5%	-4,0%
Kosovo	43.776	1,1%	60.917	1,4%	9.888	1,5%	+47,7%
Canada	73.352	1,9%	85.228	2,0%	9.037	1,4%	-33,5%
Other Destinations	1.260.663	32,4%	1.266.320	29,5%	141.494	21,3%	-26,7%
Extra-EU	3.886.567		4.291.816		663.295		+5,3%
% Change				+10,4%			

# TRADE

## EU IMPORTS

### Beef & Live Animals

#### EU Imports of Beef and Live Animals (Excl Fats): Trade Figures (COMEXT – tonnes cwe)

*In Tons of Carcase Weight*

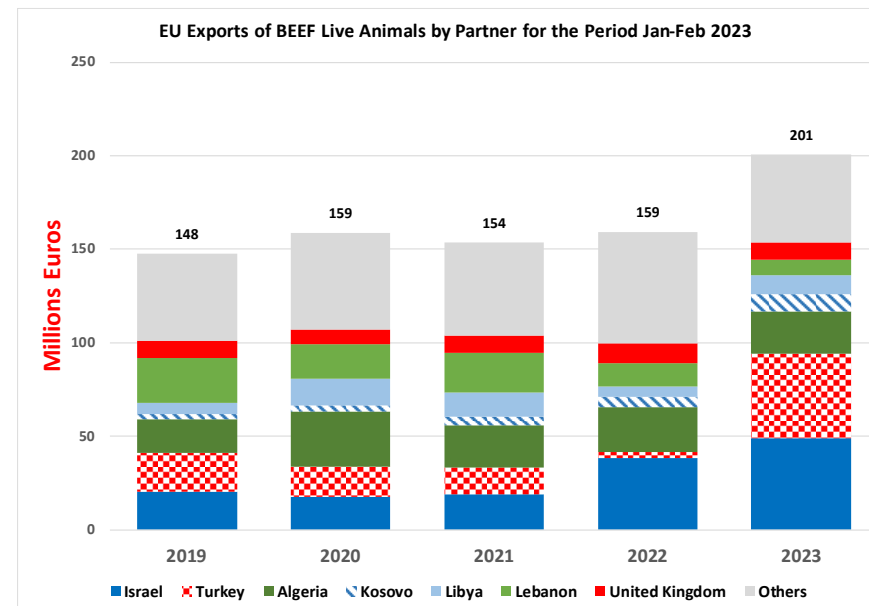
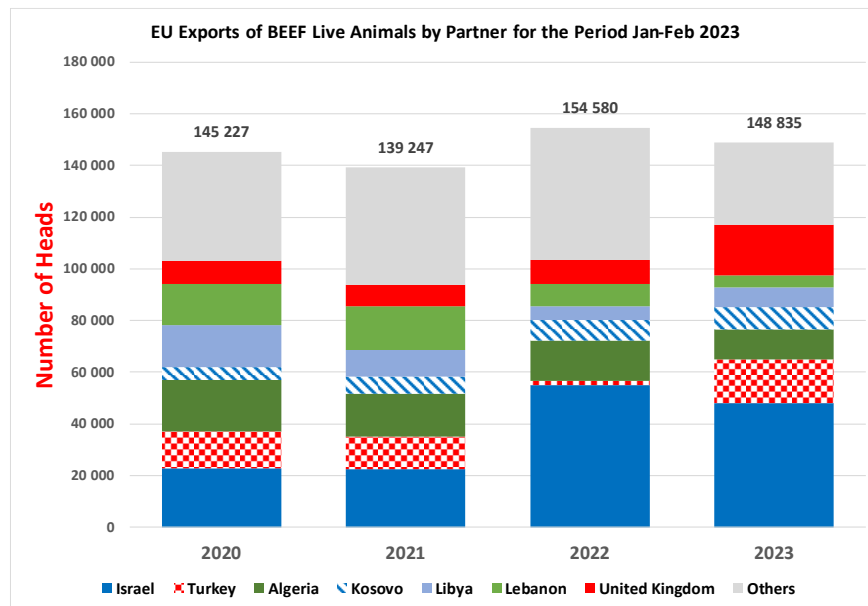
Origins	2021		2022		Jan to Feb 2023		Compared to Jan to Feb 2022
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	87.599	28,3%	142.445	37,0%	20.743	34,9%	+24,0%
Brazil	81.737	26,4%	86.508	22,5%	14.576	24,5%	-4,6%
Argentina	52.300	16,9%	62.605	16,3%	10.431	17,5%	+43,6%
Uruguay	42.669	13,8%	37.669	9,8%	6.531	11,0%	+1,2%
USA	14.910	4,8%	17.269	4,5%	2.510	4,2%	+42,1%
Australia	8.925	2,9%	8.385	2,2%	1.111	1,9%	-38,2%
Namibia	1.996	0,6%	5.168	1,3%	900	1,5%	+61,4%
Paraguay	3.933	1,3%	5.404	1,4%	652	1,1%	+1,8%
New Zealand	4.380	1,4%	5.527	1,4%	634	1,1%	+15,1%
Switzerland	4.714	1,5%	4.729	1,2%	594	1,0%	-24,3%
Canada	1.816	0,6%	2.176	0,6%	264	0,4%	+14,2%
Other Destinations	4.290	1,4%	7.170	1,9%	510	0,9%	-41,9%
Extra-EU	309.270		385.054		59.456		+12,3%
% Change				+24,5%			

*In Thousand Euros*

	2021		2022		Jan to Feb 2023		Compared to Jan to Feb 2022
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	359.675	20,1%	569.499	22,4%	83.356	23,4%	+14,9%
Brazil	387.194	21,7%	542.446	21,3%	83.720	23,5%	+2,6%
Argentina	376.658	21,1%	550.853	21,7%	67.156	18,9%	+29,5%
Uruguay	246.910	13,8%	321.519	12,7%	47.450	13,3%	+3,3%
USA	156.708	8,8%	214.772	8,5%	31.714	8,9%	+49,2%
Australia	90.481	5,1%	101.737	4,0%	14.368	4,0%	-26,9%
Namibia	6.902	0,4%	24.570	1,0%	3.567	1,0%	+95,4%
Paraguay	20.419	1,1%	35.579	1,4%	3.123	0,9%	-9,3%
New Zealand	31.669	1,8%	50.317	2,0%	5.635	1,6%	+29,6%
Switzerland	53.477	3,0%	55.346	2,2%	7.307	2,1%	-30,2%
Canada	18.559	1,0%	21.873	0,9%	3.316	0,9%	+32,8%
Other Destinations	37.331	2,1%	52.844	2,1%	5.419	1,5%	+1,3%
Extra-EU	1.785.984		2.541.354		356.132		+11,0%
% Change				+42,3%			

# TRADE

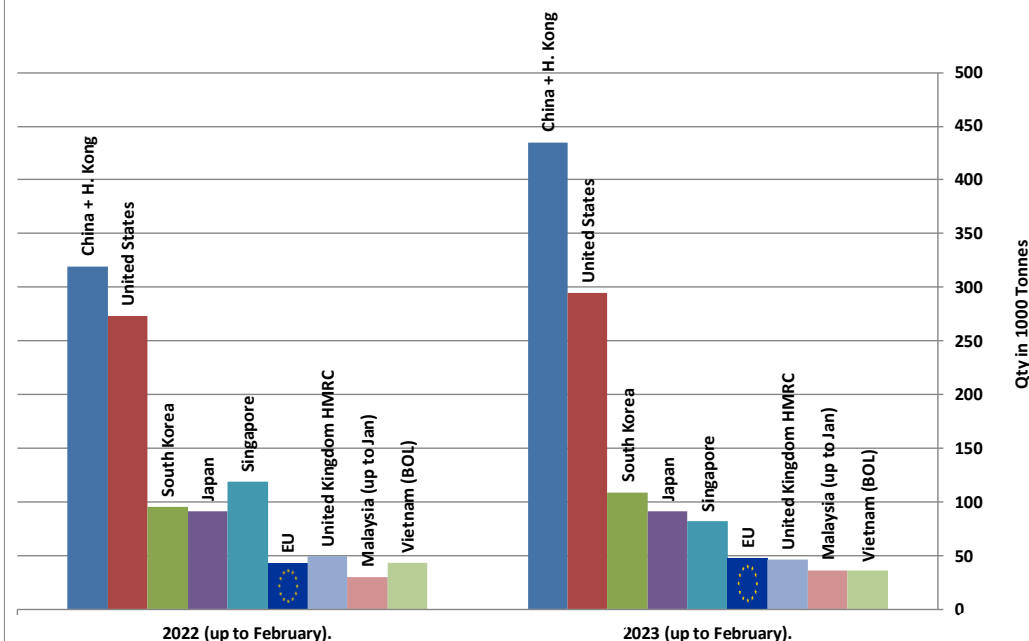
## EU EXPORTS Live Animals



# WORLD BEEF MARKET

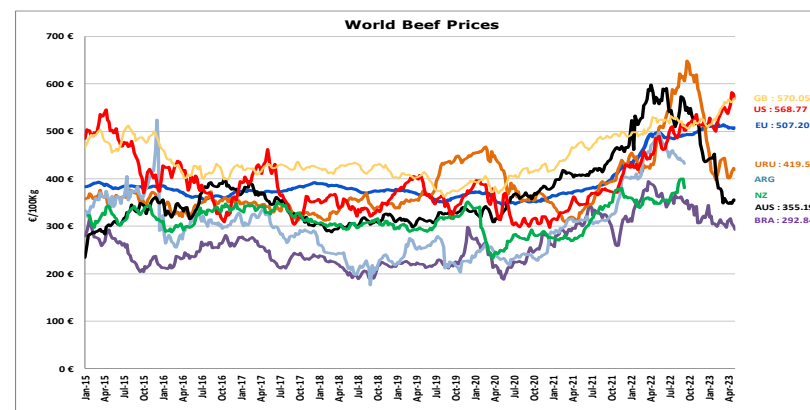
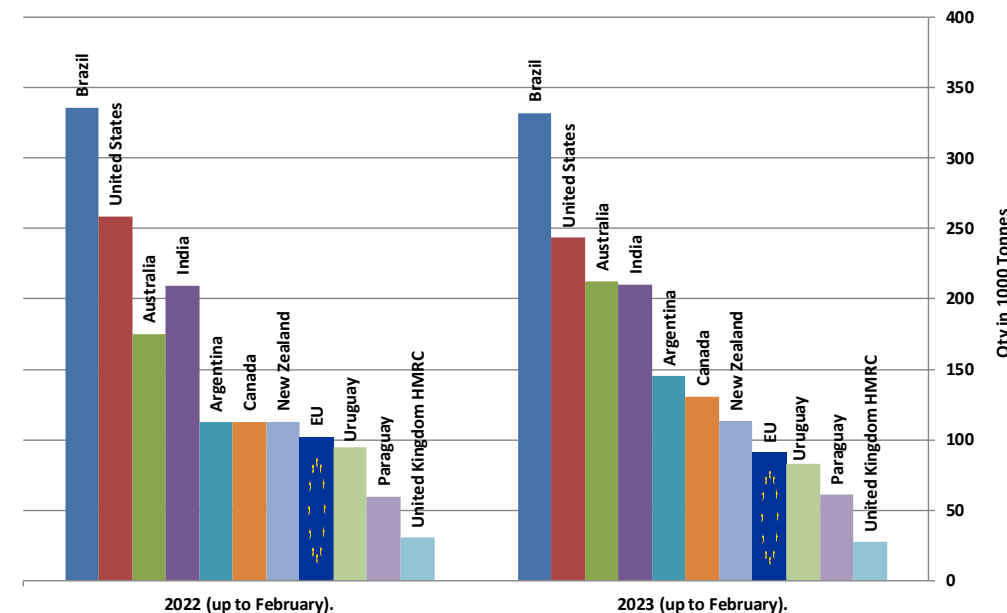
## Main Importers of BEEF Products (up to February).

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 February).

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



THANK YOU VERY MUCH

More Information at:

EU Market Observatory

[https://ec.europa.eu/agriculture/market-observatory/meat\\_en](https://ec.europa.eu/agriculture/market-observatory/meat_en)

And

Agri-FOOD data portal:

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

# Thank you



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