

# BEEF & VEAL MARKET SITUATION



Meat Market Observatory  
25 June 2018

# LIVESTOCK

## DECEMBER SURVEY

# EU EVOLUTION TOTAL BOVINE

| Dec<br>1000 Hd | TOTAL LIVESTOCK |        |        |        | %Var<br>2017<br>2016 | BOVINE < 1 Year |        |        |        | %Var<br>2017<br>2016 | BOVINE 1-2 Year |        |        |        | %Var<br>2017<br>2016 | BOVINE > 2 Year |        |        |        | %Var<br>2017<br>2016 |
|----------------|-----------------|--------|--------|--------|----------------------|-----------------|--------|--------|--------|----------------------|-----------------|--------|--------|--------|----------------------|-----------------|--------|--------|--------|----------------------|
|                | 2014            | 2015   | 2016   | 2017   |                      | 2014            | 2015   | 2016   | 2017   |                      | 2014            | 2015   | 2016   | 2017   |                      | 2014            | 2015   | 2016   | 2017   |                      |
| BE             | 2 477           | 2 503  | 2 501  | 2 386  | -4.6%                | 745             | 749    | 748    | 700    | -6.5%                | 490             | 493    | 492    | 484    | -1.6%                | 1 243           | 1 261  | 1 261  | 1 202  | -4.7%                |
| BG             | 562             | 561    | 570    | 552    | -3.1%                | 121             | 109    | 120    | 110    | -8.4%                | 65              | 64     | 63     | 57     | -10.2%               | 376             | 388    | 387    | 386    | -0.4%                |
| CZ             | 1 373           | 1 366  | 1 340  | 1 366  | +2.0%                | 413             | 403    | 397    | 407    | +2.4%                | 311             | 309    | 295    | 299    | +1.4%                | 649             | 654    | 648    | 660    | +2.0%                |
| DK             | 1 553           | 1 566  | 1 554  | 1 558  | +0.3%                | 534             | 538    | 540    | 541    | +0.2%                | 307             | 302    | 298    | 294    | -1.3%                | 713             | 726    | 715    | 723    | +1.1%                |
| DE             | 12 742          | 12 635 | 12 467 | 12 281 | -1.5%                | 3 909           | 3 836  | 3 795  | 3 704  | -2.4%                | 3 011           | 2 993  | 2 960  | 2 904  | -1.9%                | 5 823           | 5 806  | 5 712  | 5 673  | -0.7%                |
| EE             | 265             | 256    | 248    | 251    | +1.2%                | 73              | 70     | 68     | 70     | +2.5%                | 54              | 53     | 50     | 49     | -2.0%                | 138             | 133    | 130    | 133    | +1.8%                |
| IE             | 6 243           | 6 422  | 6 613  | 6 674  | +0.9%                | 1 886           | 2 026  | 2 077  | 2 087  | +0.5%                | 1 649           | 1 660  | 1 778  | 1 792  | +0.8%                | 2 709           | 2 737  | 2 759  | 2 795  | +1.3%                |
| EL             | 659             | 582    | 554    | 555    | +0.2%                | 176             | 154    | 145    | 140    | -3.4%                | 119             | 103    | 102    | 107    | +4.9%                | 365             | 325    | 306    | 308    | +0.7%                |
| ES             | 6 079           | 6 183  | 6 318  | 6 467  | +2.4%                | 2 302           | 2 325  | 2 404  | 2 492  | +3.7%                | 746             | 786    | 804    | 822    | +2.3%                | 3 031           | 3 072  | 3 110  | 3 153  | +1.4%                |
| FR             | 19 271          | 19 406 | 19 004 | 18 580 | -2.2%                | 5 546           | 5 618  | 5 138  | 4 844  | -5.7%                | 3 418           | 3 461  | 3 493  | 3 400  | -2.7%                | 10 307          | 10 327 | 10 372 | 10 336 | -0.3%                |
| HR             | 441             | 455    | 462    | 470    | +1.7%                | 132             | 148    | 154    | 156    | +1.3%                | 88              | 88     | 89     | 99     | +11.2%               | 221             | 219    | 219    | 215    | -1.8%                |
| IT             |                 |        | 6 315  | 6 350  | +0.6%                | 1 654           | 1 678  | 1 745  | 1 738  | -0.4%                | 1 366           | 1 379  | 1 448  | 1 501  | +3.6%                | 3 106           | 3 099  | 3 122  | 3 111  | -0.3%                |
| CY             | 60              | 59     | 63     | 67     | +6.0%                | 22              | 21     | 22     | 23     | +7.0%                | 10              | 9      | 10     | 11     | +9.5%                | 28              | 29     | 32     | 33     | +4.3%                |
| LV             | 422             | 419    | 412    | 406    | -1.6%                | 118             | 114    | 113    | 108    | -4.2%                | 75              | 76     | 73     | 70     | -3.9%                | 229             | 229    | 227    | 228    | +0.5%                |
| LT             | 737             | 723    | 695    | 676    | -2.7%                | 192             | 185    | 179    | 180    | +0.5%                | 149             | 152    | 143    | 135    | -5.5%                | 395             | 385    | 373    | 362    | -3.1%                |
| LU             | 201             | 201    | 202    | 198    | -2.1%                | 54              | 54     | 54     | 50     | -7.1%                | 47              | 45     | 44     | 44     | -0.3%                | 100             | 102    | 104    | 103    | -0.3%                |
| HU             | 802             | 821    | 852    | 870    | +2.1%                | 219             | 220    | 239    | 243    | +1.7%                | 176             | 180    | 176    | 179    | +1.7%                | 407             | 421    | 438    | 448    | +2.3%                |
| MT             | 15              | 15     | 14     | 14     | -1.3%                | 4               | 4      | 4      | 4      | +7.7%                | 3               | 4      | 3      | 3      | -3.4%                | 7               | 7      | 7      | 7      | -4.9%                |
| NL             | 4 169           | 4 315  | 4 294  | 4 030  | -6.1%                | 1 676           | 1 707  | 1 666  | 1 594  | -4.3%                | 657             | 660    | 644    | 575    | -10.7%               | 1 836           | 1 948  | 1 985  | 1 860  | -6.3%                |
| AT             | 1 961           | 1 958  | 1 954  | 1 943  | -0.6%                | 629             | 624    | 632    | 624    | -1.4%                | 432             | 439    | 432    | 439    | +1.5%                | 899             | 894    | 890    | 881    | -1.0%                |
| PL             | 5 660           | 5 763  | 5 970  | 6 036  | +1.1%                | 1 450           | 1 617  | 1 718  | 1 713  | -0.3%                | 1 445           | 1 532  | 1 637  | 1 669  | +1.9%                | 2 765           | 2 614  | 2 615  | 2 654  | +1.5%                |
| PT             | 1 549           | 1 606  | 1 635  | 1 670  | +2.1%                | 487             | 510    | 499    | 515    | +3.1%                | 214             | 240    | 267    | 256    | -4.1%                | 848             | 856    | 869    | 900    | +3.5%                |
| RO             | 2 069           | 2 092  | 2 050  | 1 989  | -2.9%                | 463             | 475    | 447    | 431    | -3.6%                | 254             | 261    | 251    | 244    | -2.8%                | 1 352           | 1 357  | 1 352  | 1 315  | -2.8%                |
| SI             | 468             | 484    | 489    | 480    | -1.9%                | 148             | 153    | 155    | 153    | -1.2%                | 122             | 129    | 131    | 128    | -1.8%                | 198             | 202    | 203    | 198    | -2.4%                |
| SK             | 466             | 457    | 446    | 440    | -1.4%                | 130             | 130    | 130    | 125    | -4.4%                | 93              | 91     | 84     | 84     | +0.0%                | 243             | 236    | 231    | 231    | -0.2%                |
| FI             | 907             | 903    | 887    | 875    | -1.4%                | 307             | 308    | 302    | 299    | -1.1%                | 223             | 221    | 218    | 213    | -2.5%                | 378             | 374    | 367    | 363    | -1.1%                |
| SE             | 1 436           | 1 428  | 1 436  | 1 449  | +0.9%                | 473             | 467    | 468    | 474    | +1.3%                | 334             | 342    | 344    | 342    | -0.6%                | 629             | 619    | 624    | 633    | +1.4%                |
| UK             | 9 693           | 9 816  | 9 806  | 9 791  | -0.2%                | 2 842           | 2 967  | 2 952  | 2 944  | -0.3%                | 2 332           | 2 372  | 2 435  | 2 435  | idem                 | 4 520           | 4 477  | 4 419  | 4 412  | -0.2%                |
| EU             | 82 280          | 82 996 | 89 152 | 88 424 | -0.8%                | 26 705          | 27 209 | 26 911 | 26 468 | -1.6%                | 18 189          | 18 445 | 18 764 | 18 635 | -0.7%                | 43 514          | 43 498 | 43 476 | 43 320 | -0.4%                |

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2016 AND 2017

25 June 2018

# LIVESTOCK

## DECEMBER SURVEY

# EU EVOLUTION

## COWS

| Dec<br>1000 Hd | TOTAL COWS |        |        |        | %Var<br>2017<br>2016 | DAIRY COWS |        |        |        | %Var<br>2017<br>2016 | OTHER COWS |        |        |        | %Var<br>2017<br>2016 |
|----------------|------------|--------|--------|--------|----------------------|------------|--------|--------|--------|----------------------|------------|--------|--------|--------|----------------------|
|                | 2014       | 2015   | 2016   | 2017   |                      | 2014       | 2015   | 2016   | 2017   |                      | 2014       | 2015   | 2016   | 2017   |                      |
| BE             | 956        | 974    | 988    | 938    | -5.1%                | 519        | 529    | 531    | 519    | -2.2%                | 436        | 445    | 457    | 419    | -8.4%                |
| BG             | 351        | 359    | 365    | 357    | -2.2%                | 302        | 283    | 279    | 260    | -6.7%                | 49         | 76     | 86     | 97     | +12.4%               |
| CZ             | 566        | 566    | 561    | 571    | +1.9%                | 372        | 369    | 367    | 365    | -0.5%                | 194        | 197    | 193    | 206    | +6.4%                |
| DK             | 643        | 664    | 657    | 664    | +1.1%                | 547        | 570    | 565    | 575    | +1.8%                | 96         | 94     | 92     | 89     | -3.3%                |
| DE             | 4 969      | 4 966  | 4 887  | 4 859  | -0.6%                | 4 296      | 4 285  | 4 218  | 4 199  | -0.4%                | 674        | 681    | 670    | 660    | -1.4%                |
| EE             | 118        | 116    | 114    | 116    | +1.8%                | 96         | 91     | 86     | 86     | +0.3%                | 23         | 25     | 28     | 30     | +6.1%                |
| IE             | 2 169      | 2 293  | 2 337  | 2 362  | +1.0%                | 1 128      | 1 240  | 1 295  | 1 343  | +3.7%                | 1 041      | 1 053  | 1 042  | 1 018  | -2.3%                |
| EL             | 305        | 274    | 241    | 244    | +1.2%                | 135        | 111    | 106    | 103    | -2.8%                | 169        | 163    | 135    | 141    | +4.4%                |
| ES             | 2 669      | 2 763  | 2 785  | 2 823  | +1.4%                | 845        | 844    | 834    | 824    | -1.3%                | 1 824      | 1 919  | 1 950  | 1 999  | +2.5%                |
| FR             | 7 841      | 7 872  | 7 856  | 7 745  | -1.4%                | 3 699      | 3 661  | 3 630  | 3 595  | -1.0%                | 4 142      | 4 211  | 4 225  | 4 151  | -1.8%                |
| HR             | 180        | 171    | 167    | 161    | -3.6%                | 159        | 152    | 147    | 139    | -5.4%                | 21         | 19     | 20     | 22     | +10.0%               |
| IT             |            |        | 2 365  | 2 338  | -1.1%                |            |        | 2 060  | 2 040  | -1.0%                |            |        | 305    | 298    | -2.2%                |
| CY             | 25         | 26     | 29     | 30     | +6.2%                | 25         | 26     | 28     | 30     | +6.2%                | 0          | 0      | 0      | 0      | -7.1%                |
| LV             | 200        | 201    | 199    | 199    | +0.1%                | 166        | 162    | 154    | 150    | -2.4%                | 34         | 39     | 45     | 49     | +8.8%                |
| LT             | 351        | 343    | 333    | 323    | -3.1%                | 314        | 301    | 286    | 273    | -4.5%                | 37         | 43     | 47     | 50     | +5.7%                |
| LU             | 75         | 77     | 80     | 78     | -1.7%                | 47         | 49     | 52     | 52     | +0.3%                | 29         | 28     | 28     | 26     | -5.4%                |
| HU             | 359        | 368    | 383    | 395    | +3.1%                | 255        | 250    | 244    | 244    | idem                 | 104        | 117    | 138    | 151    | +9.4%                |
| MT             | 7          | 7      | 7      | 6      | -5.1%                | 7          | 6      | 7      | 6      | -5.5%                | 0          | 0      | 0      | 0      | +16.7%               |
| NL             | 1 694      | 1 802  | 1 864  | 1 723  | -7.6%                | 1 610      | 1 717  | 1 794  | 1 665  | -7.2%                | 84         | 85     | 70     | 58     | -17.1%               |
| AT             | 768        | 758    | 757    | 750    | -0.8%                | 538        | 534    | 540    | 543    | +0.7%                | 230        | 224    | 217    | 207    | -4.5%                |
| PL             | 2 403      | 2 303  | 2 304  | 2 341  | +1.6%                | 2 248      | 2 134  | 2 130  | 2 153  | +1.1%                | 155        | 169    | 174    | 188    | +8.2%                |
| PT             | 697        | 719    | 724    | 728    | +0.6%                | 234        | 243    | 239    | 239    | -0.1%                | 463        | 476    | 485    | 490    | +1.0%                |
| RO             | 1 207      | 1 207  | 1 204  | 1 171  | -2.8%                | 1 188      | 1 191  | 1 193  | 1 159  | -2.8%                | 18         | 17     | 12     | 12     | -1.7%                |
| SI             | 168        | 170    | 171    | 169    | -1.5%                | 108        | 113    | 108    | 109    | +0.9%                | 60         | 57     | 64     | 60     | -5.7%                |
| SK             | 202        | 200    | 194    | 195    | +0.3%                | 143        | 139    | 133    | 130    | -2.1%                | 59         | 60     | 62     | 65     | +5.3%                |
| FI             | 340        | 339    | 333    | 329    | -1.2%                | 283        | 282    | 275    | 271    | -1.7%                | 57         | 57     | 57     | 58     | +1.1%                |
| SE             | 517        | 513    | 514    | 522    | +1.7%                | 344        | 337    | 326    | 323    | -0.8%                | 173        | 176    | 188    | 199    | +6.0%                |
| UK             | 3 419      | 3 469  | 3 451  | 3 444  | -0.2%                | 1 883      | 1 918  | 1 898  | 1 902  | +0.2%                | 1 536      | 1 551  | 1 554  | 1 542  | -0.8%                |
| EU             | 33 198     | 33 521 | 35 868 | 35 581 | -0.8%                | 21 489     | 21 537 | 23 525 | 23 299 | -1.0%                | 11 708     | 11 983 | 12 342 | 12 283 | -0.5%                |

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2016 AND 2017

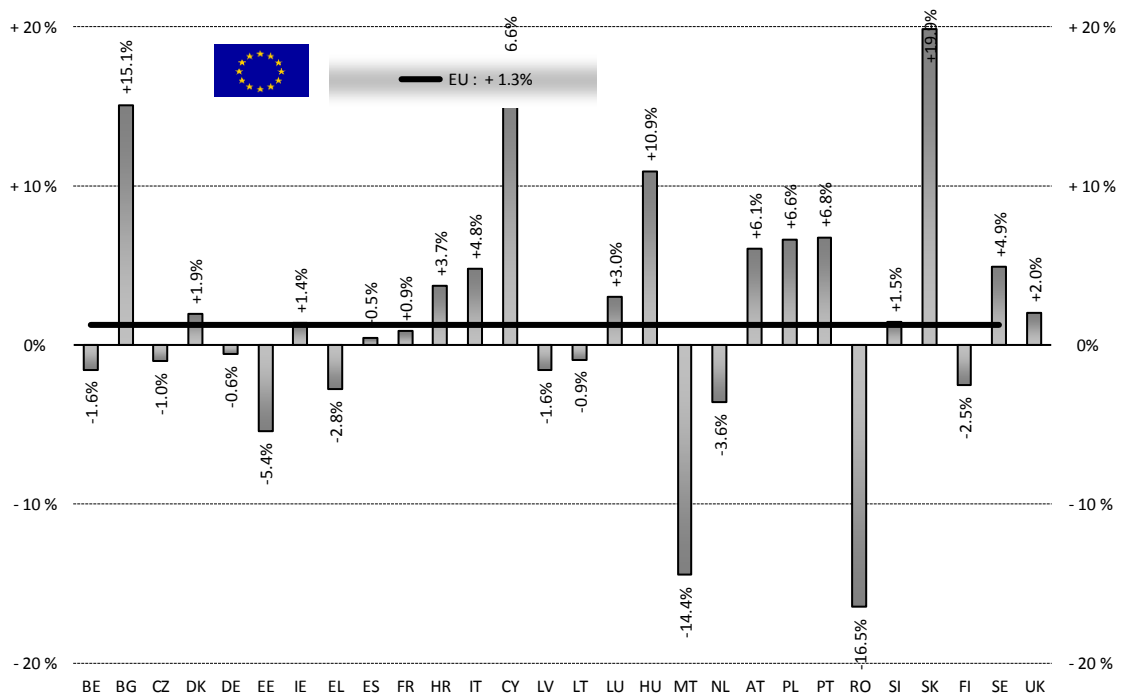
25 June 2018

# PRODUCTION

# % EVOLUTION HEADS

| HEADS                  | Jan-Mar 17/18 |       |
|------------------------|---------------|-------|
|                        | EU15          | EU28  |
| Bull                   | +0.5%         | +2.0% |
| Bullock                | +0.1%         | +0.0% |
| Cow                    | +0.5%         | +0.4% |
| Heifer                 | +4.7%         | +4.4% |
| Calve                  | +0.7%         | +0.9% |
| Young cattle           | -2.4%         | -2.6% |
| Meat of bovine animals | +1.0%         | +1.3% |

Estimates for last month of period :



Source : EStat - Newcronos

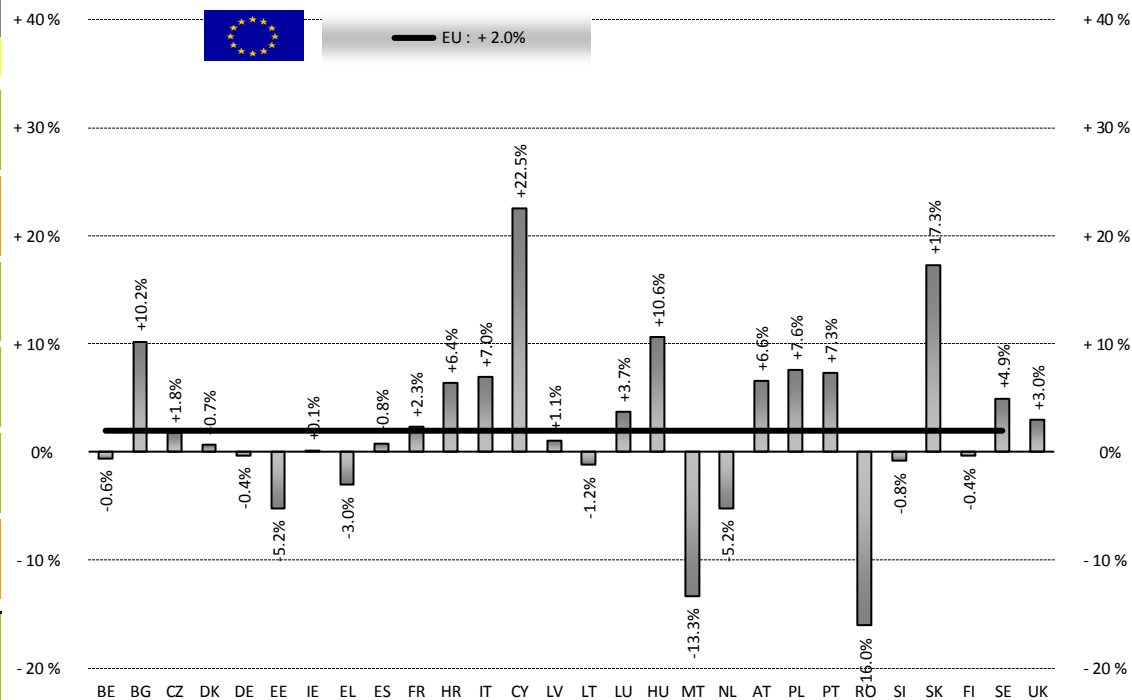
25 June 2018

# PRODUCTION

# % EVOLUTION TONNES

| TONNES                 | Jan-Mar 17/18 |       |
|------------------------|---------------|-------|
|                        | EU15          | EU28  |
| Bull                   | -0.3%         | +1.3% |
| Bullock                | -0.2%         | -0.2% |
| Cow                    | +2.1%         | +2.0% |
| Heifer                 | +6.1%         | +5.8% |
| Calve                  | +2.4%         | +2.4% |
| Young cattle           | -2.4%         | -2.5% |
| Meat of bovine animals | +1.7%         | +2.0% |

Estimates for last month of period :

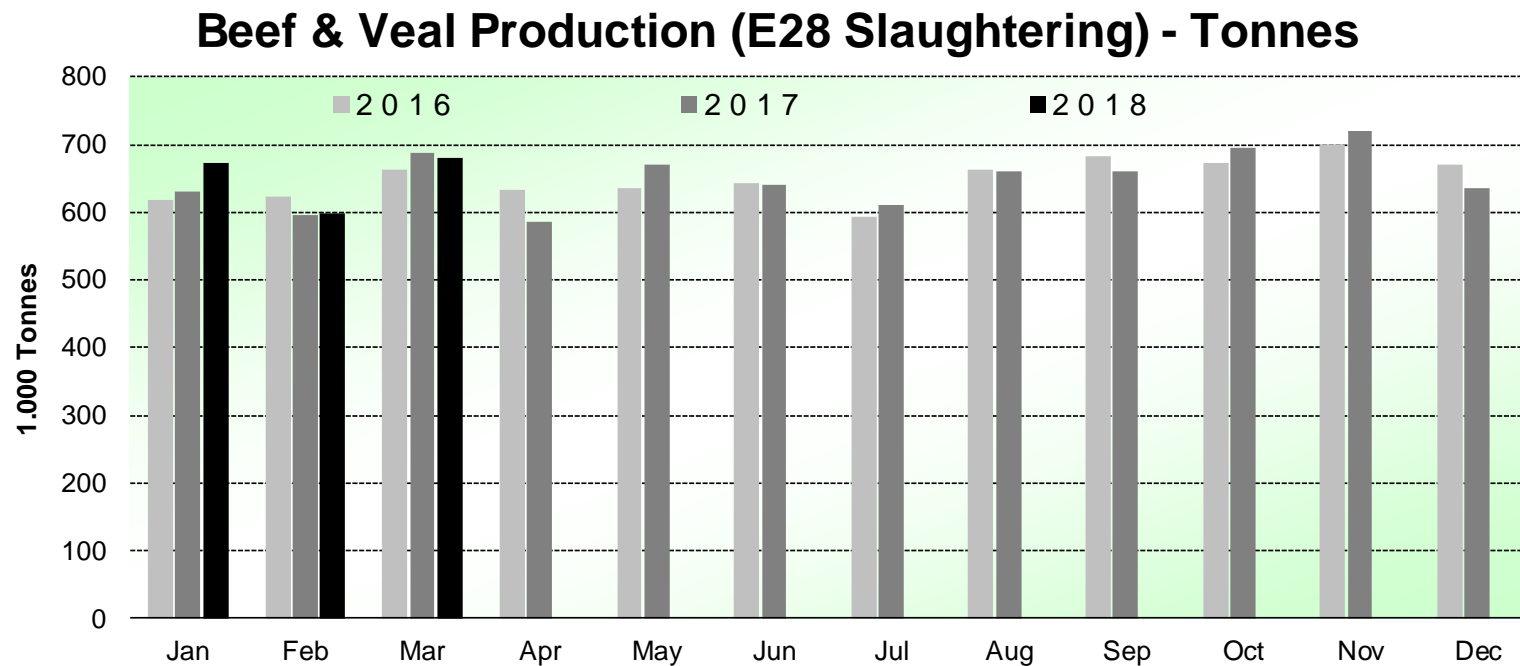


Source : EStat - Newcronos

25 June 2018

# PRODUCTION

HISTORIC  
TONNES



Source : EStat-Newcronos

25 June 2018

# PRICES CARCASSES

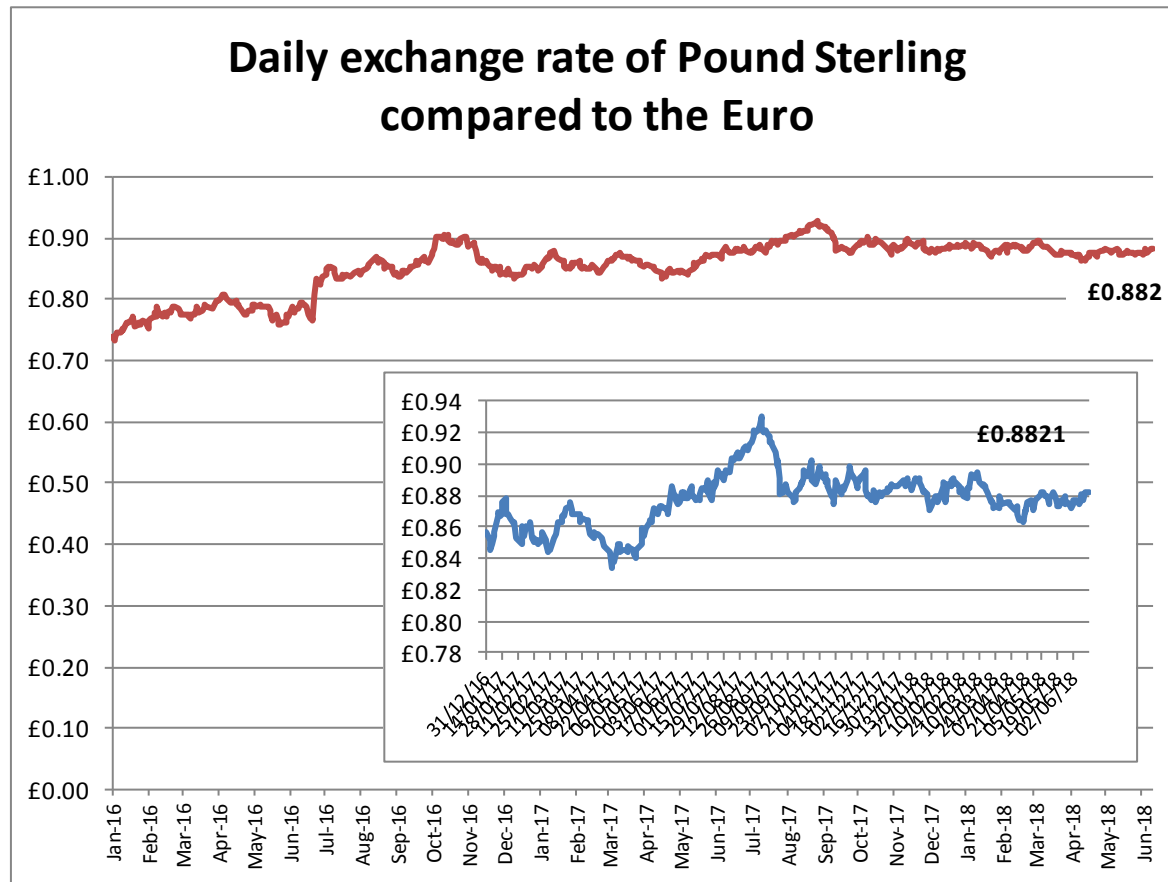
## Dashboard

| EU Prices week |                              | 24    | Evolution since last week |        | Evolution since last month | Evolution since last year |
|----------------|------------------------------|-------|---------------------------|--------|----------------------------|---------------------------|
| Carcasse       | Average A/C/Z -R3            | 378.7 | €/100 kg                  | + 0.0% | + 0.1%                     | + 1.6%                    |
|                | Young Bovines (Z)            | 396.9 |                           | + 0.4% | + 0.4%                     | + 0.4%                    |
|                | Young Bulls (A)              | 371.0 |                           | + 0.0% | - 0.2%                     | + 1.3%                    |
|                | Steers (C)                   | 418.5 |                           | - 0.1% | + 0.8%                     | + 1.4%                    |
|                | Cows (D)                     | 307.5 |                           | + 0.2% | + 0.9%                     | + 2.4%                    |
|                | Heifers (E)                  | 393.8 |                           | + 0.1% | + 0.2%                     | + 1.1%                    |
| Live Animals   | Male Calves Dairy Type       | 137.1 | €/head                    | - 0.1% | + 4.6%                     | + 5.8%                    |
|                | Male Calves Beef Type        | 240.6 |                           | - 1.7% | + 2.6%                     | - 1.7%                    |
|                | Young Store Cattle           | 2.40  | €/kg                      | - 1.2% | - 0.3%                     | + 1.0%                    |
|                | Yearling Male Store Cattle   | 2.34  |                           | - 0.6% | - 0.3%                     | + 1.8%                    |
|                | Yearling Female Store Cattle | 2.34  |                           | - 0.2% | - 0.2%                     | - 0.1%                    |
|                | Calves slaughtered <8M       | 487.1 | €/100                     | - 1.1% | - 2.6%                     | - 2.7%                    |

Sources : MSs notifications (Regulation (EC) 1249/2008 and 807/2013)

25 June 2018

# EXCHANGE RATE INDEX / Euro

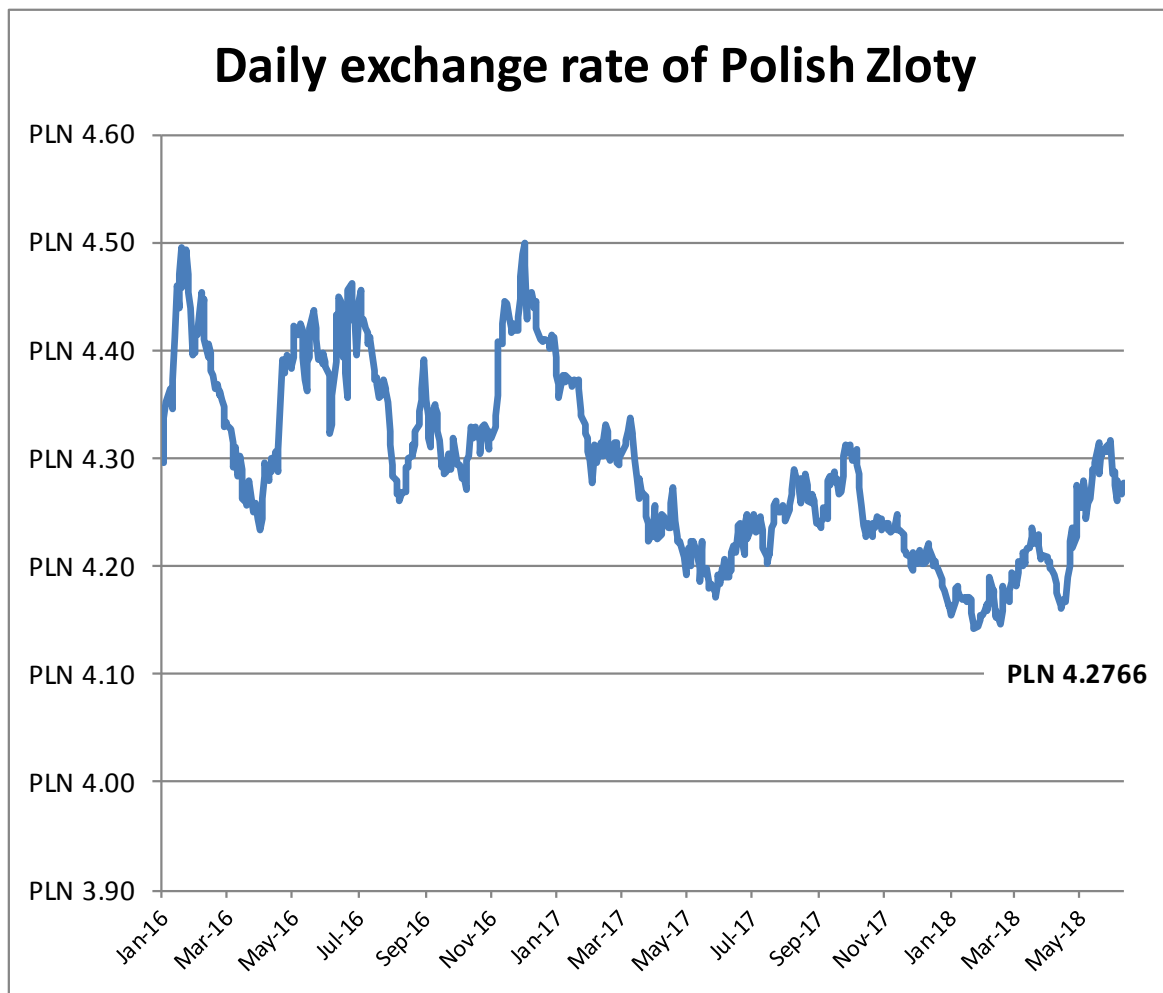


Source : ECB

25 June 2018



## EXCHANGE RATE INDEX / Euro



25 June 2018

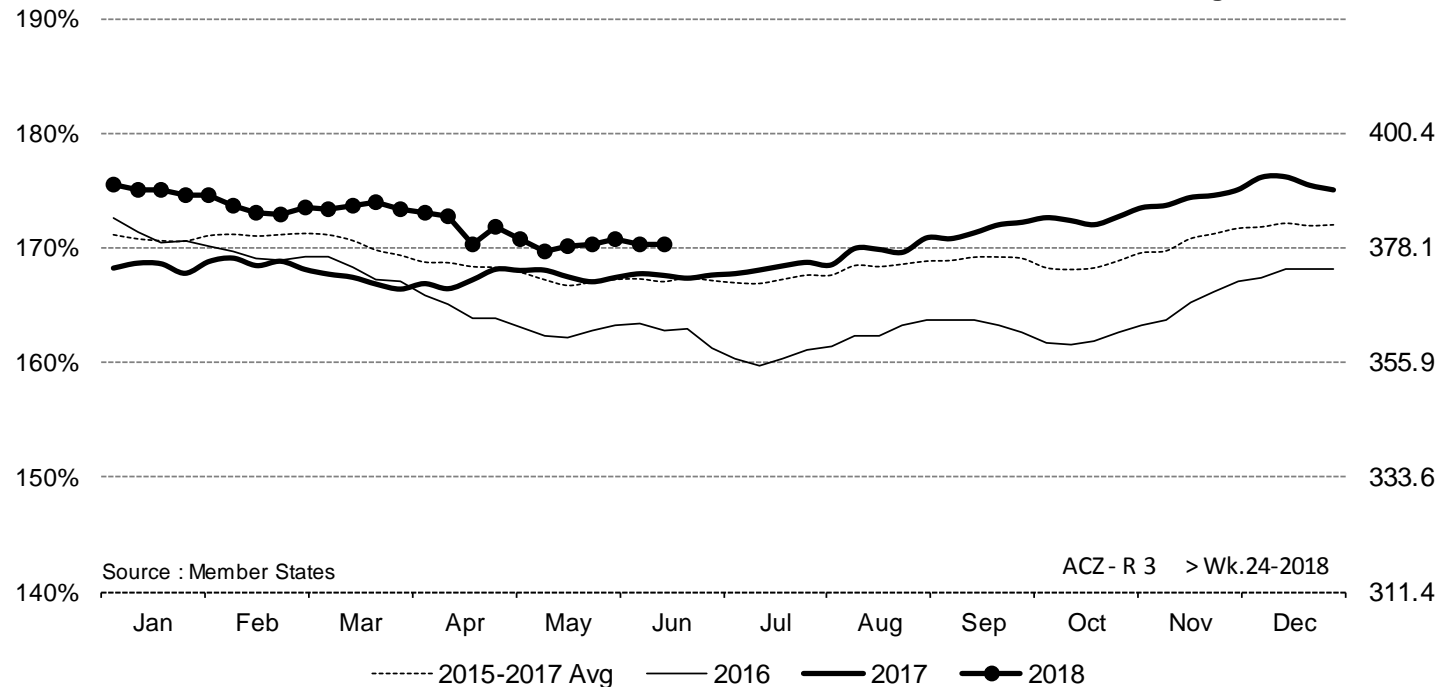
# PRICES CARCASSES

## EU EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.24-2018

% of Reference Price

€/100 kg cwe



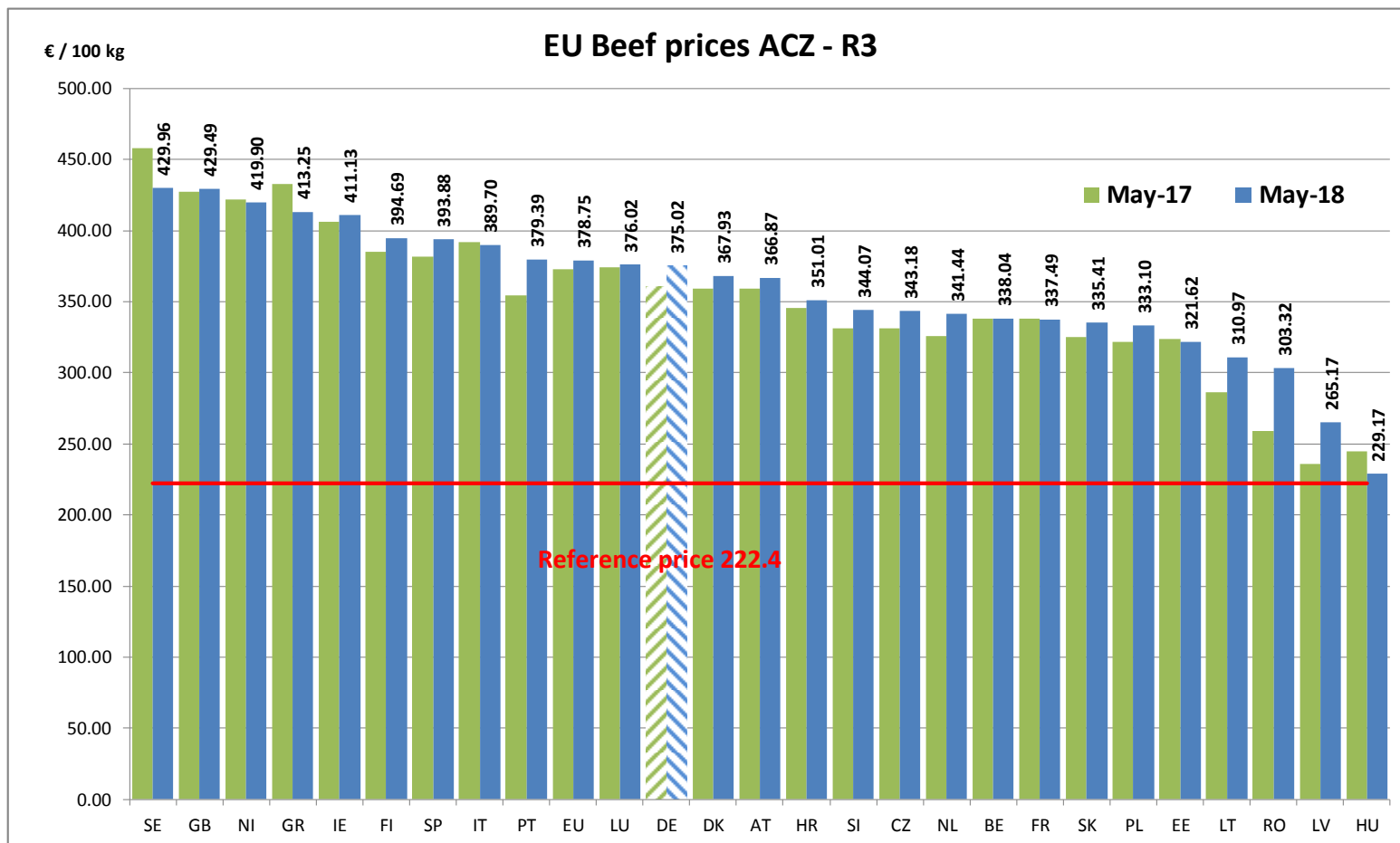
Price in week 24 : **378.74**  
 % change y/y : **+ 1.6%**  
 % Ref. Price in wk 24 : **167.6%**

Average price in May 2018 : **378.75**  
 % change y/y : **+ 1.6%**

25 June 2018

# PRICES CARCASSES

EU EVOLUTION  
A/C/Z.R3

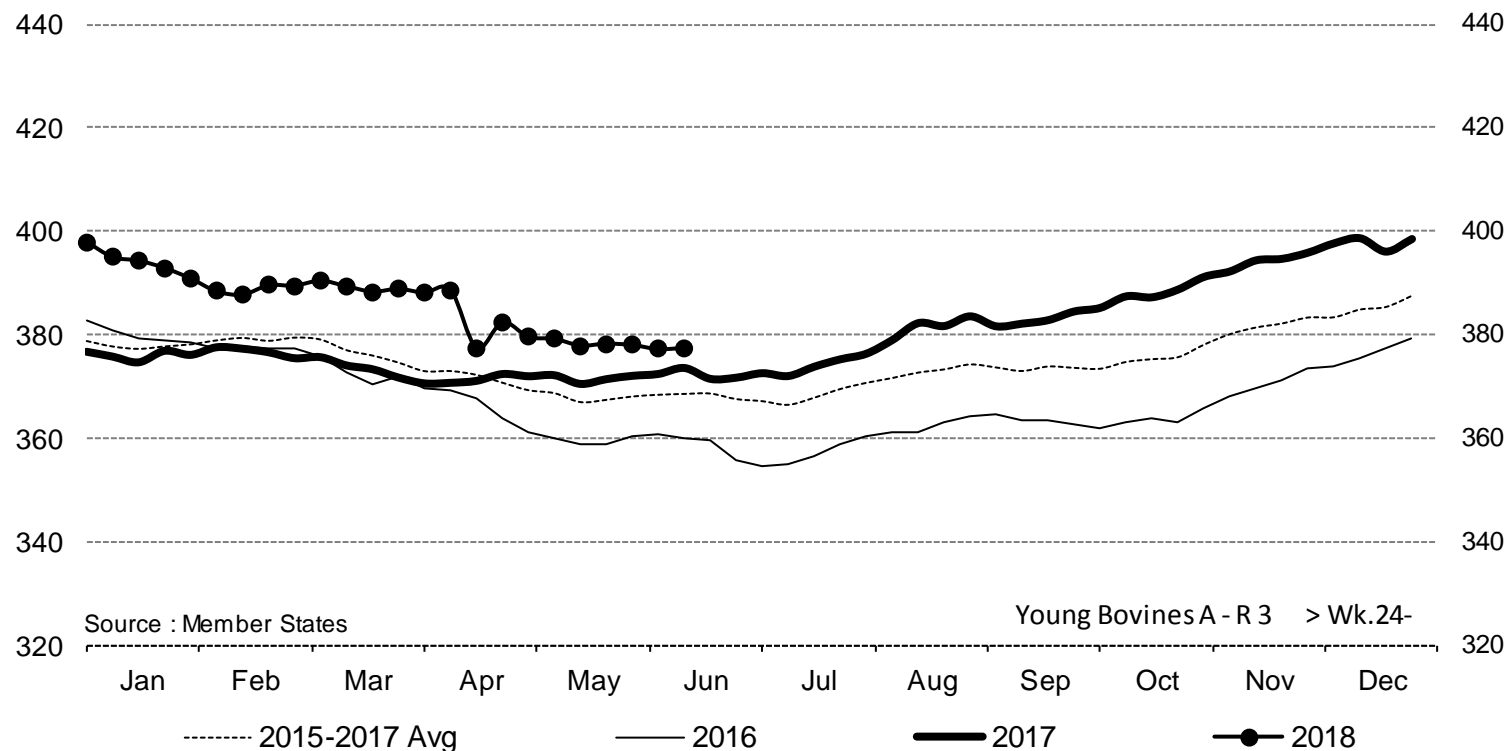


25 June 2018

# PRICES CARCASSES

# EU EVOLUTION YOUNG BULL - A.R3

Young Bovines A - R 3 > Wk.24-2018



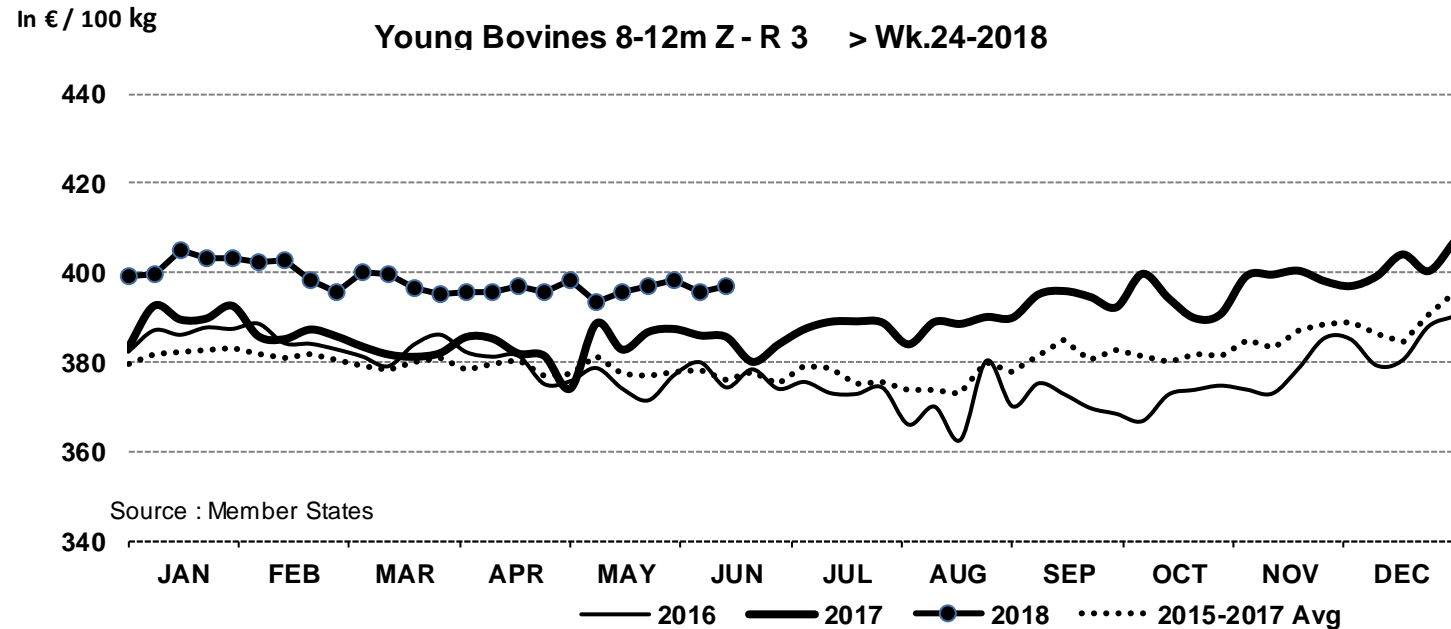
Price in week 24 : **377.41**  
% change y/y : **+ 1.0%**

Average price in May 2018 : **378.57**  
% change y/y : **+ 1.9%**

25 June 2018

# PRICES CARCASSES

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



Price in week 24 : **396.99**  
% change y/y : **+ 3.0%**

18/05/2018

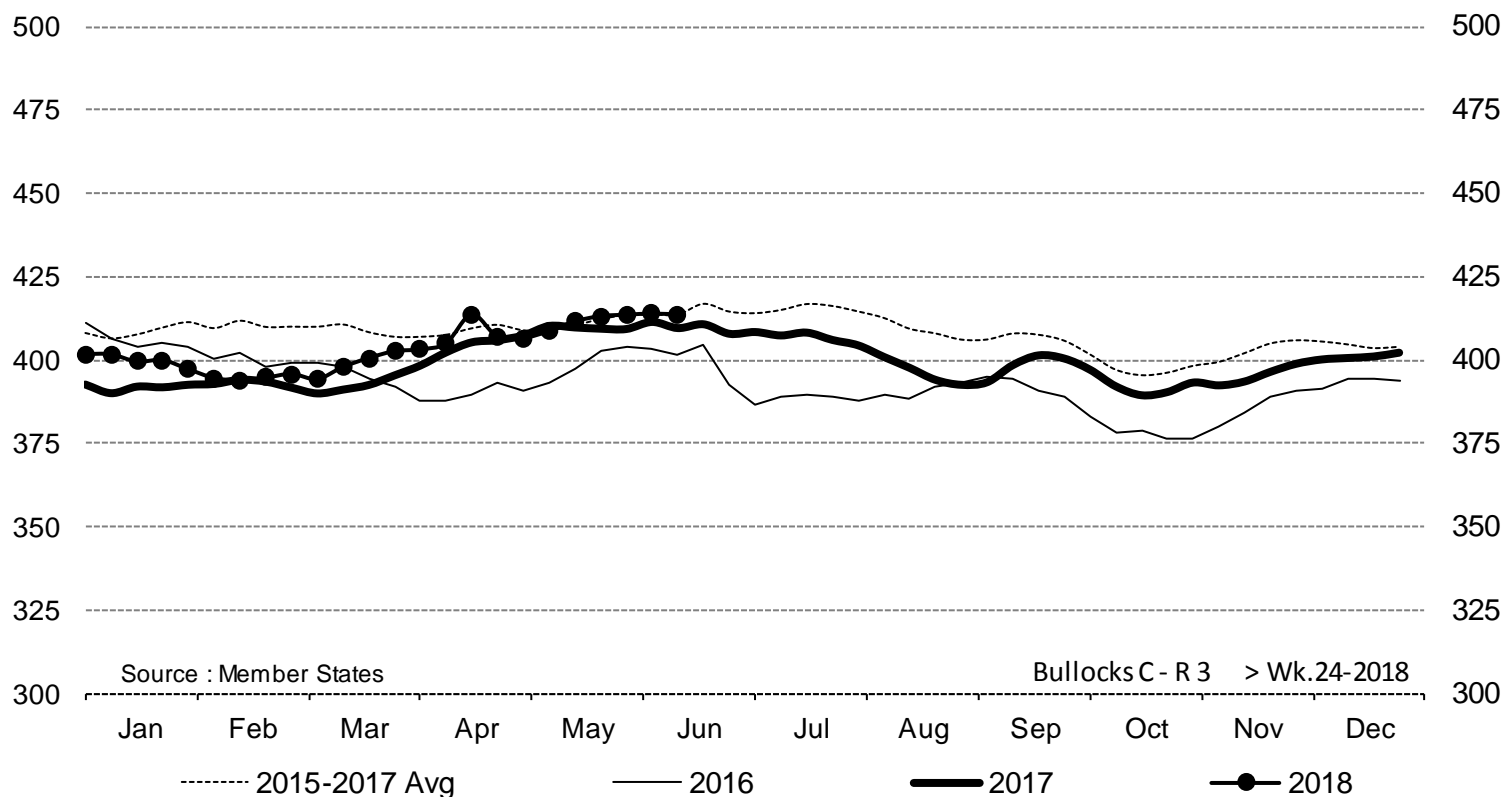
Average price in May 2018 : **396.24**  
% change y/y : **+ 3.3%**

25 June 2018

# PRICES CARCASSES

# E.U. EVOLUTION STEER - C.R3

**Bullocks C - R 3 > Wk.24-2018**



Price in week 24 : **413.60**  
% change y/y : **+ 1.0%**

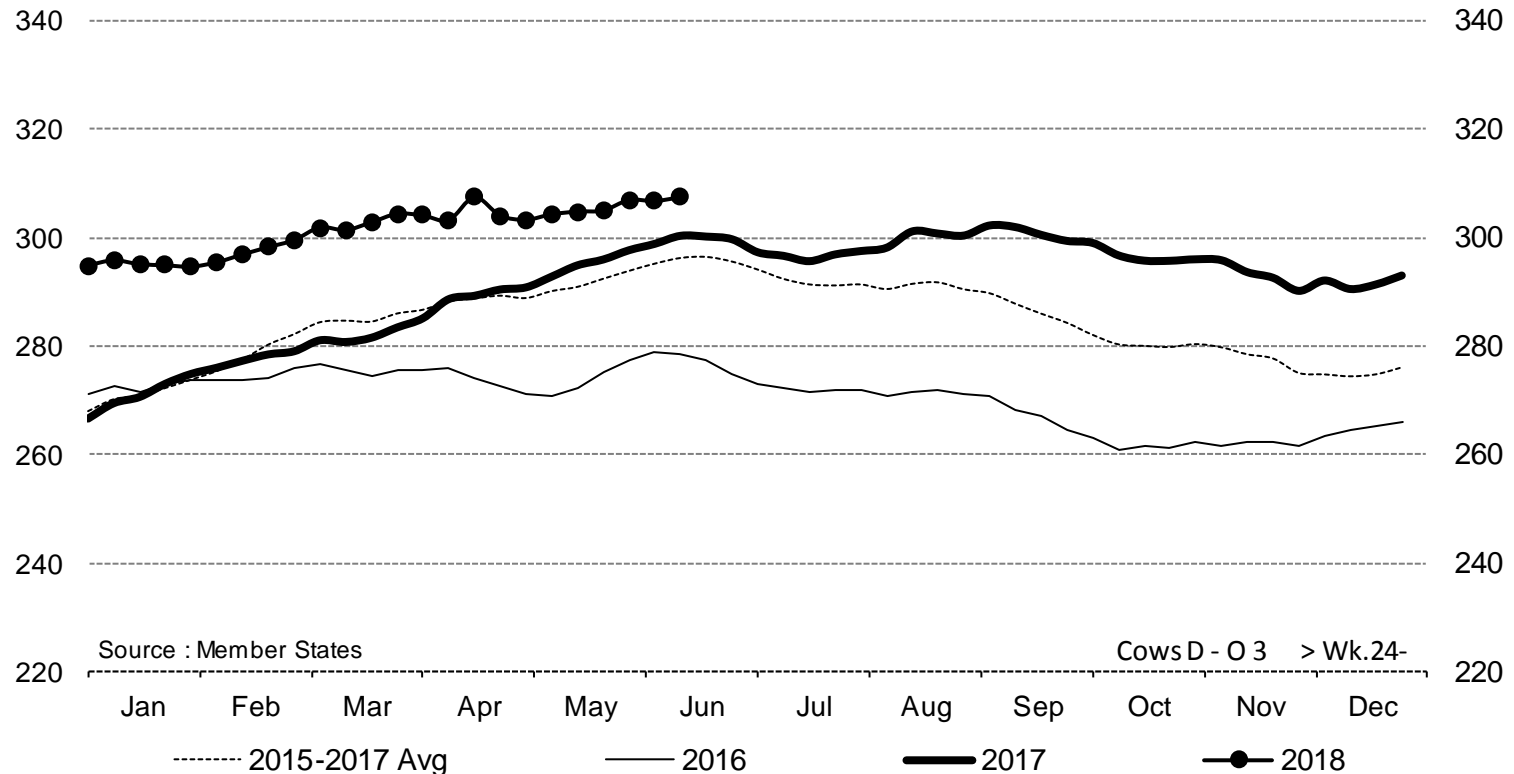
Average price in May 2018 : **410.52**  
% change y/y : **+ 0.3%**

25 June 2018

# PRICES CARCASSES

## E.U. EVOLUTION COW - D.O3

Cows D - O 3 > Wk.24-2018



Price in week 24 : **307.50**  
% change y/y : **+ 2.4%**

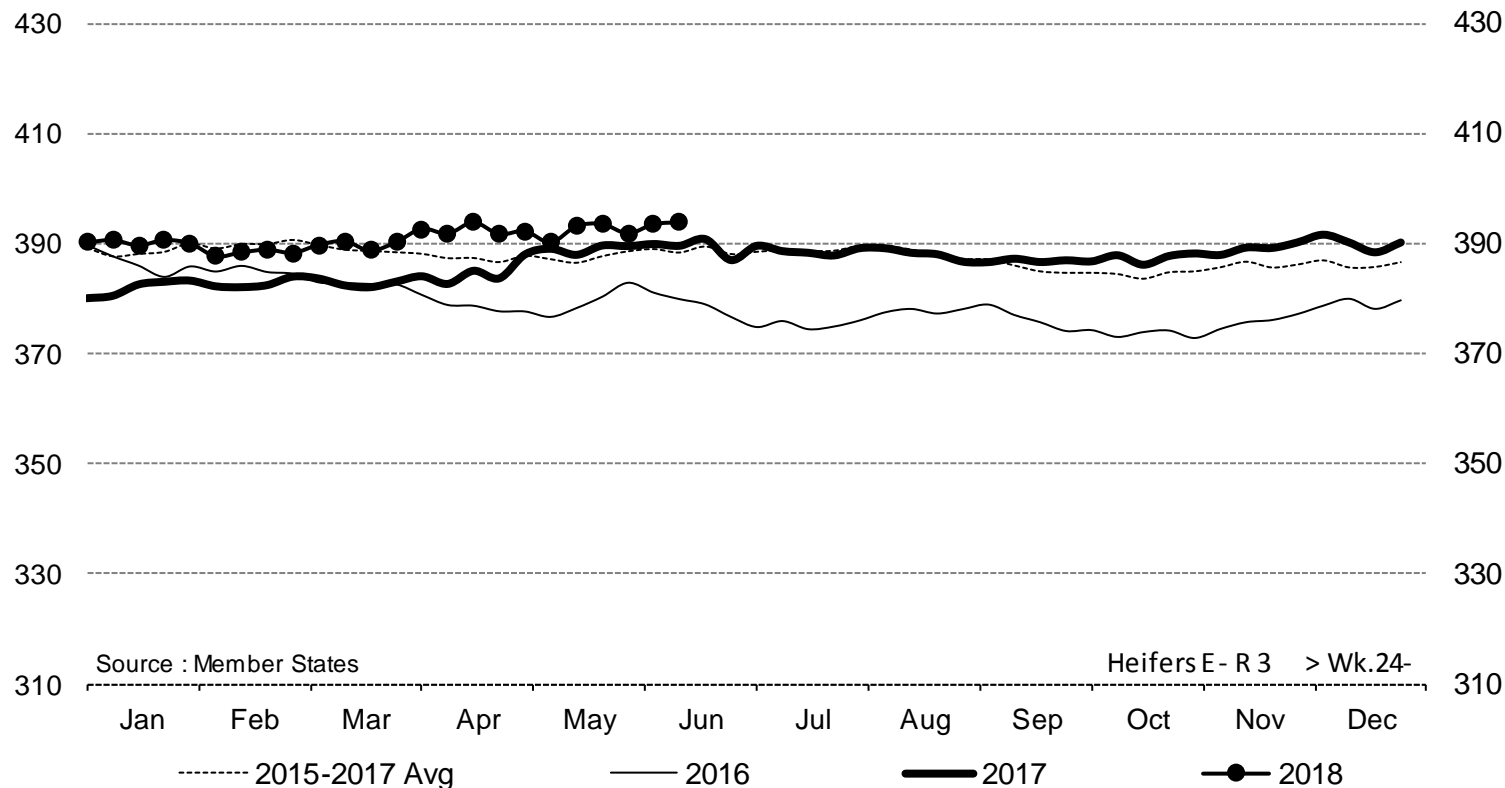
Average price in May 2018 : **304.77**  
% change y/y : **+ 3.6%**

25 June 2018

# PRICES CARCASSES

# EU EVOLUTION HEIFER - E.R3

Heifers E - R 3 > Wk.24-2018



Price in week 24 : **393.81**  
% change y/y : **+ 1.1%**

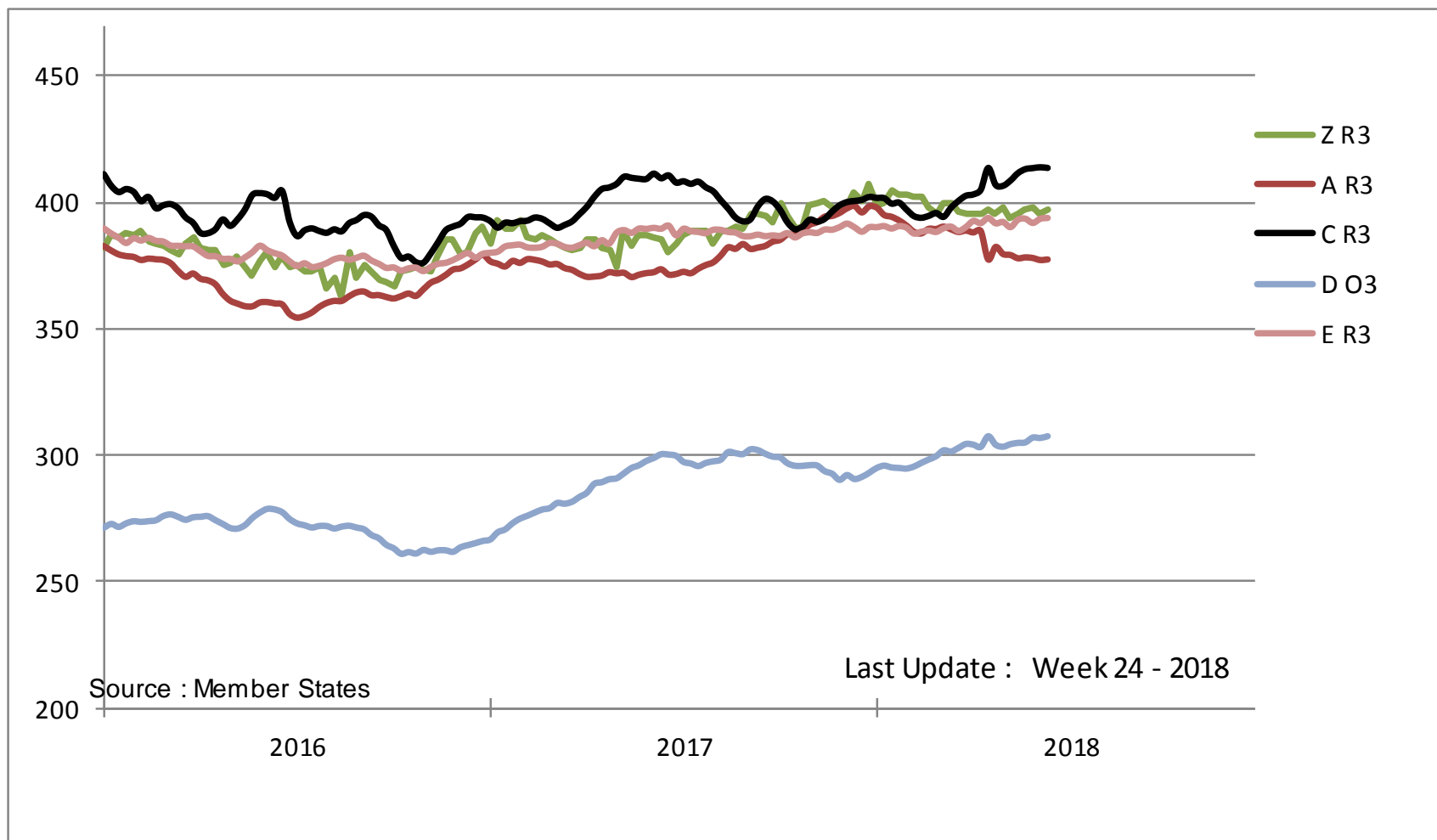
Average price in May 2018 : **392.20**  
% change y/y : **+ 0.9%**

25 June 2018



# PRICES CARCASSES

## EU EVOLUTION All CAT GLOBAL VIEW

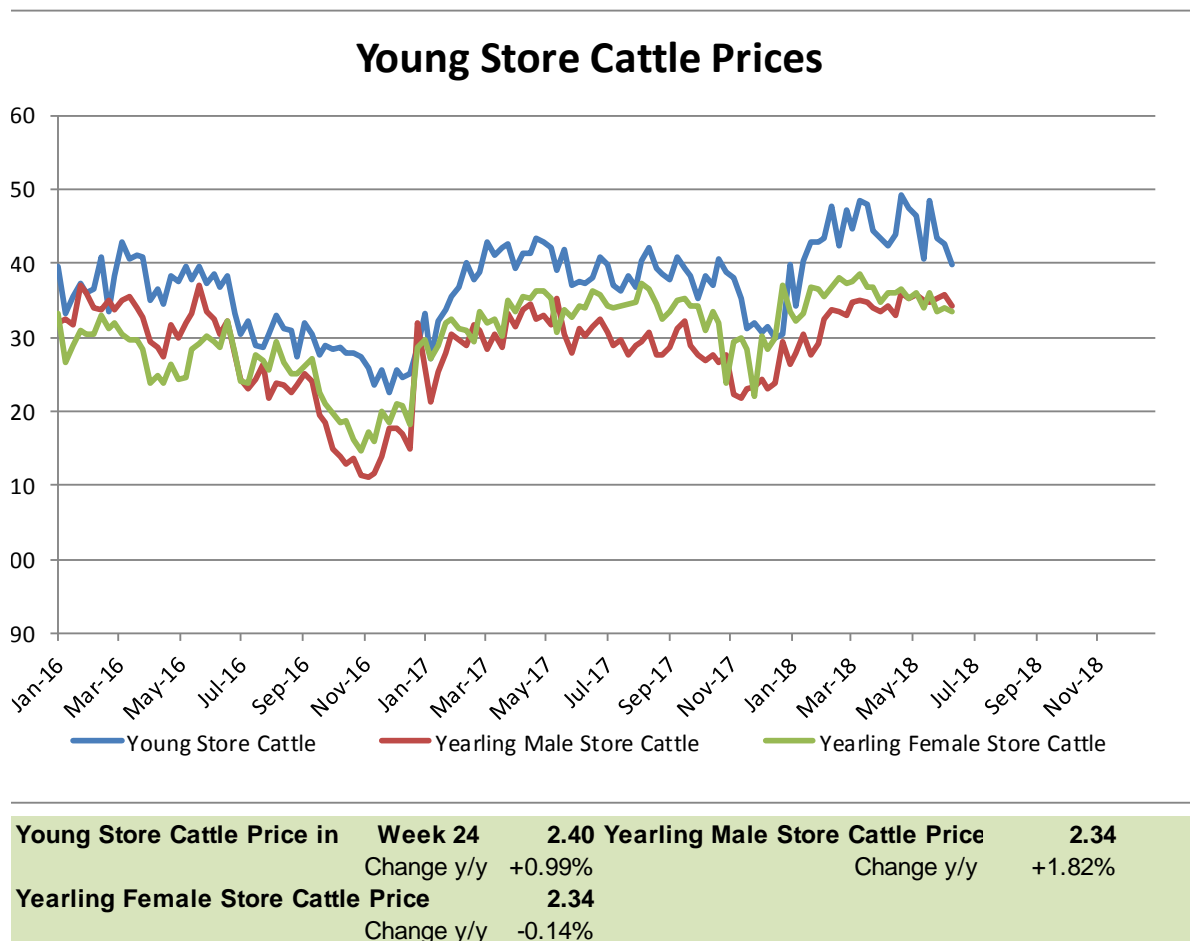


25 June 2018

# PRICES LIVE BOVINES

# EU EVOLUTION STORE CATTLE

Store cattle (€/100 kg live weight)

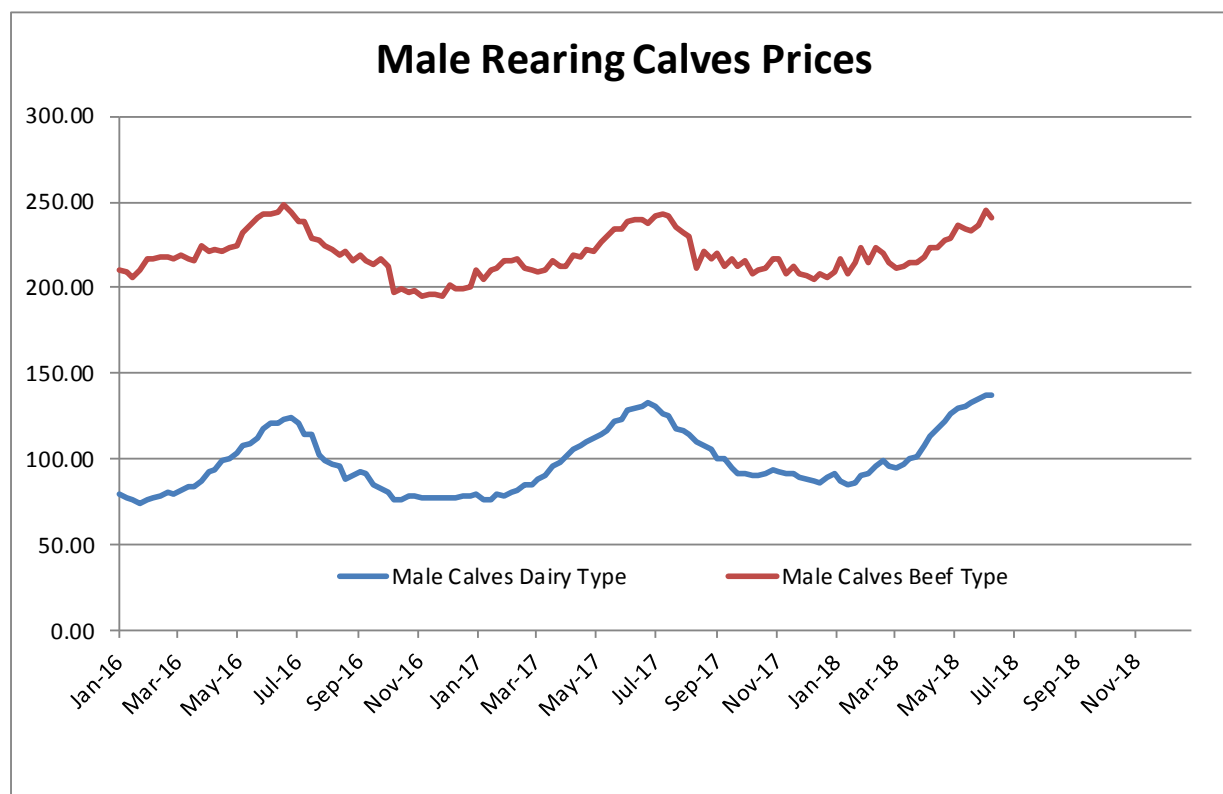


25 June 2018

# 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 24 240.65  
Change y/y +0.21%

**Male Rearing Calves Dairy type**

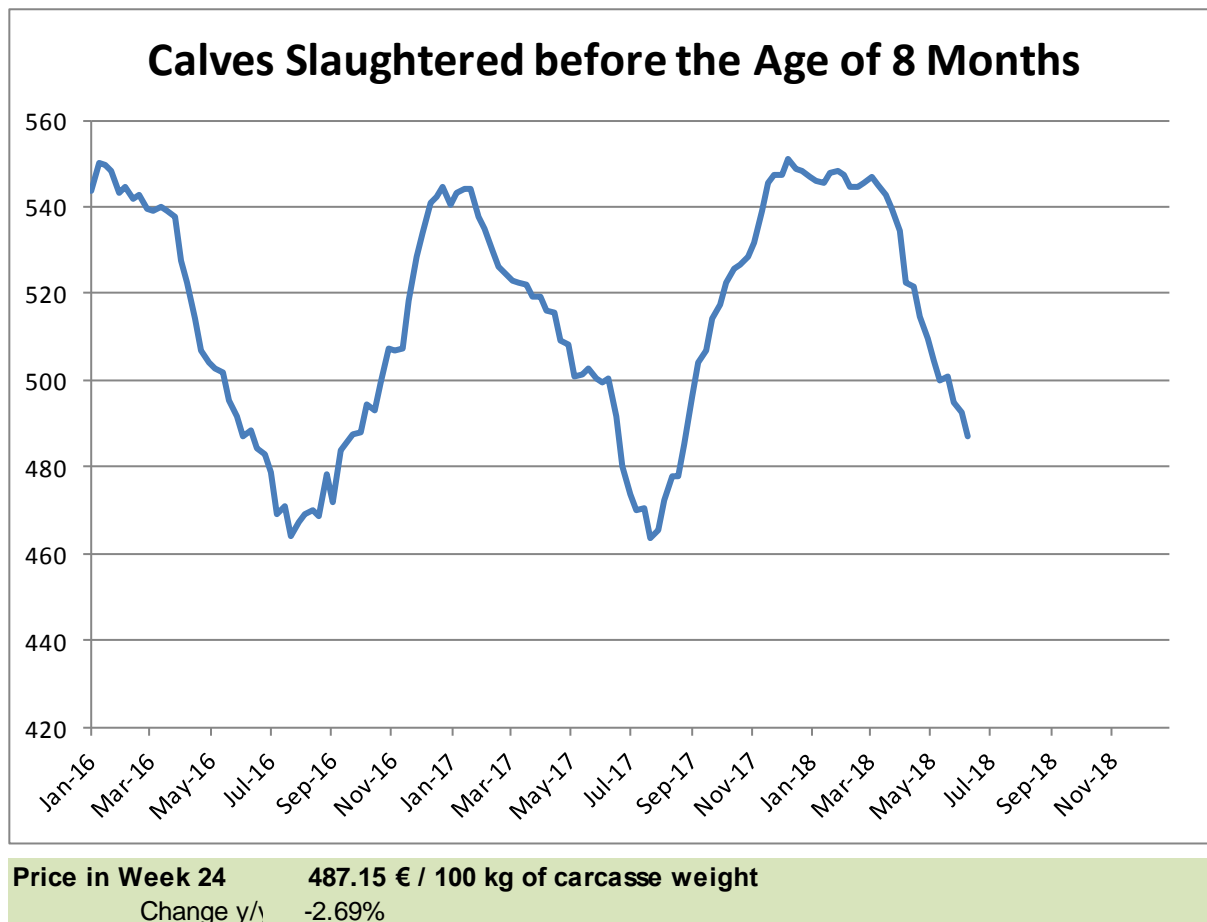
Price in Week 24 137.17  
Change y/y +5.76%

25 June 2018

# PRICES LIVE BOVINES

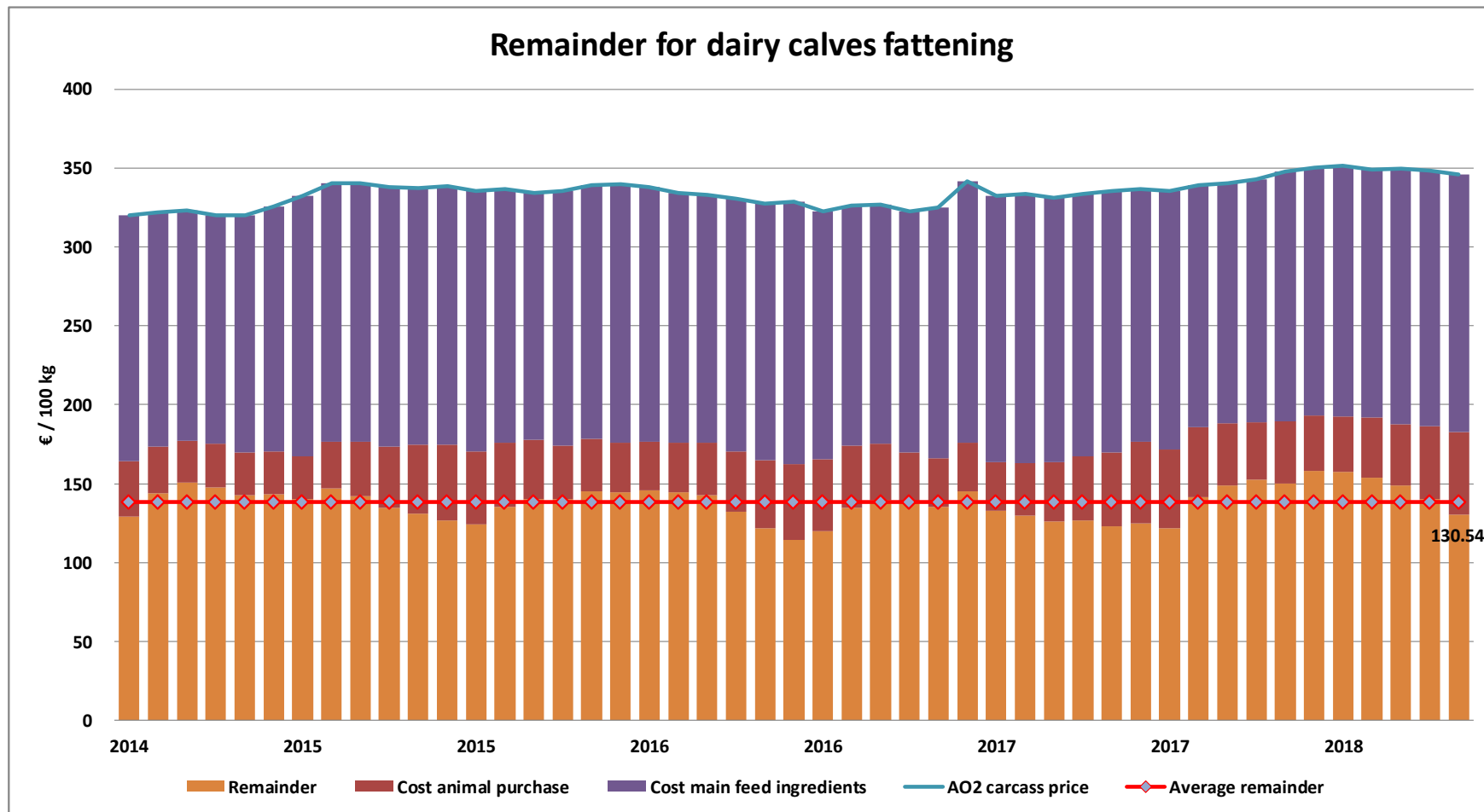
## EU EVOLUTION Butcher Calves

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



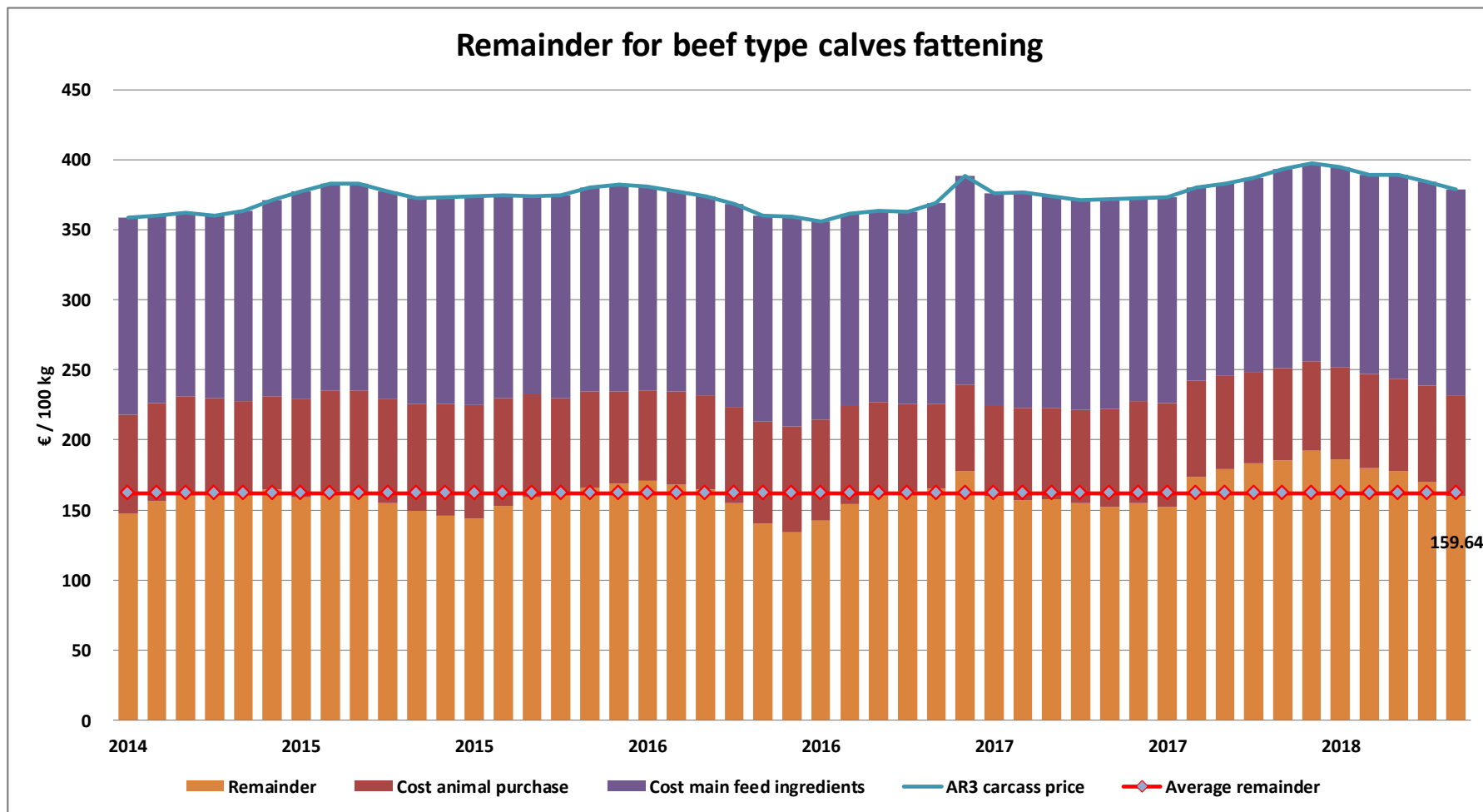
25 June 2018

# REMAINDERS



25 June 2018

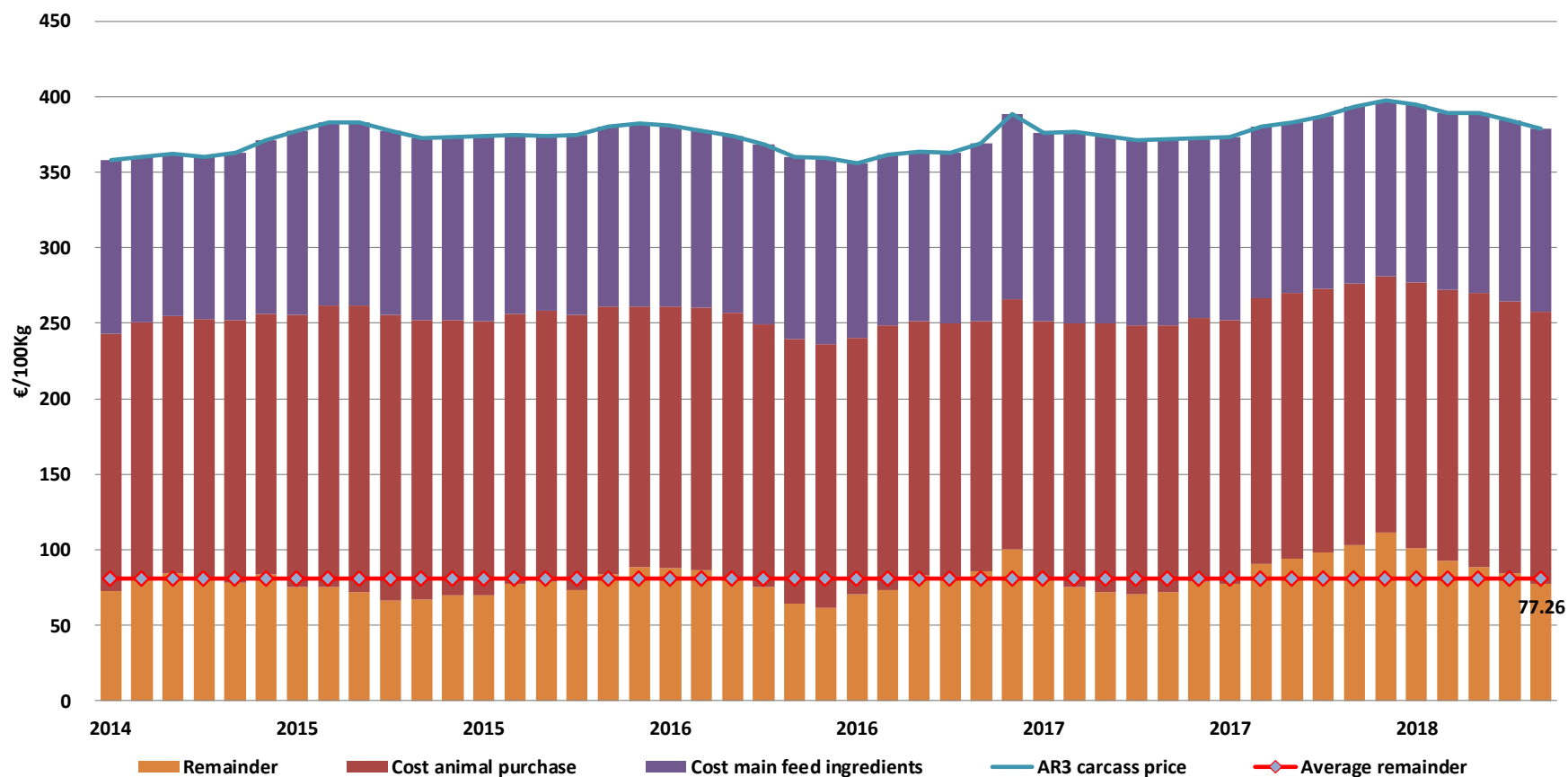
# REMAINDERS



25 June 2018

# REMAINDERS

Remainder for young store cattle fattening



25 June 2018

# TRADE

# EU EXPORTS

## Beef & Live Animals

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

| Destinations       | 2014    |       | 2015    |       | 2016    |       | 2017    |       | Jan-Apr 18 |       | Compared<br>to Jan-Apr 17 |
|--------------------|---------|-------|---------|-------|---------|-------|---------|-------|------------|-------|---------------------------|
|                    | tonnes  | %     | tonnes  | %     | tonnes  | %     | tonnes  | %     | tonnes     | %     |                           |
| Turkey             | 5 086   | 1.1%  | 8 098   | 1.4%  | 57 504  | 9.6%  | 71 035  | 10.1% | 33 397     | 14.5% | +++                       |
| Hong Kong          | 28 573  | 6.3%  | 65 112  | 11.6% | 45 198  | 7.6%  | 58 416  | 8.3%  | 27 024     | 11.7% | + 1.3%                    |
| Israel             | 9 378   | 2.1%  | 8 353   | 1.5%  | 18 851  | 3.2%  | 41 616  | 5.9%  | 15 193     | 6.6%  | - 2.0%                    |
| Algeria            | 25 911  | 5.7%  | 18 499  | 3.3%  | 16 085  | 2.7%  | 25 004  | 3.6%  | 13 604     | 5.9%  | + 37.0%                   |
| Ghana              | 40 878  | 9.0%  | 33 255  | 5.9%  | 37 364  | 6.3%  | 35 340  | 5.0%  | 12 793     | 5.5%  | - 10.8%                   |
| Lebanon            | 24 007  | 5.3%  | 37 984  | 6.8%  | 50 288  | 8.4%  | 47 033  | 6.7%  | 12 561     | 5.4%  | - 14.0%                   |
| Ivory Coast        | 21 619  | 4.8%  | 28 839  | 5.2%  | 35 742  | 6.0%  | 36 713  | 5.2%  | 12 429     | 5.4%  | - 4.5%                    |
| Philippines        | 2 730   | 0.6%  | 11 839  | 2.1%  | 13 053  | 2.2%  | 24 247  | 3.5%  | 9 475      | 4.1%  | - 18.2%                   |
| Bosnia-Herz.       | 24 068  | 5.3%  | 34 104  | 6.1%  | 39 896  | 6.7%  | 38 935  | 5.5%  | 8 846      | 3.8%  | - 17.5%                   |
| Switzerland        | 26 347  | 5.8%  | 26 633  | 4.8%  | 26 019  | 4.4%  | 25 608  | 3.6%  | 7 964      | 3.4%  | - 10.6%                   |
| Libya              | 17 778  | 3.9%  | 14 280  | 2.6%  | 19 691  | 3.3%  | 29 723  | 4.2%  | 5 037      | 2.2%  | - 38.3%                   |
| Norway             | 10 222  | 2.3%  | 7 879   | 1.4%  | 19 123  | 3.2%  | 18 319  | 2.6%  | 4 638      | 2.0%  | - 26.9%                   |
| Angola             | 10 589  | 2.3%  | 14 587  | 2.6%  | 9 643   | 1.6%  | 13 549  | 1.9%  | 4 635      | 2.0%  | + 10.7%                   |
| Chile              | 1       | 0.0%  | 27      | 0.0%  | 50      | 0.0%  | 2 228   | 0.3%  | 4 372      | 1.9%  | + 73.8%                   |
| South Africa       | 3 339   | 0.7%  | 1 325   | 0.2%  | 7 481   | 1.3%  | 7 361   | 1.0%  | 4 105      | 1.8%  | + 32.7%                   |
| Morocco            | 5 986   | 1.3%  | 7 652   | 1.4%  | 4 703   | 0.8%  | 7 517   | 1.1%  | 3 679      | 1.6%  | + 21.6%                   |
| Ukraine            | 3 500   | 0.8%  | 2 922   | 0.5%  | 2 859   | 0.5%  | 7 875   | 1.1%  | 2 986      | 1.3%  | + 16.7%                   |
| Other Destinations | 192 525 | 42.5% | 237 850 | 42.5% | 192 727 | 32.3% | 211 156 | 30.1% | 48 311     | 20.9% |                           |
| Extra-EU           | 452 537 |       | 559 237 |       | 596 276 |       | 701 677 |       | 231 049    |       |                           |
| % change           |         |       | + 24%   |       | + 7%    |       | + 18%   |       | - 3.8%     |       |                           |



# TRADE

# EU EXPORTS

## Beef

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

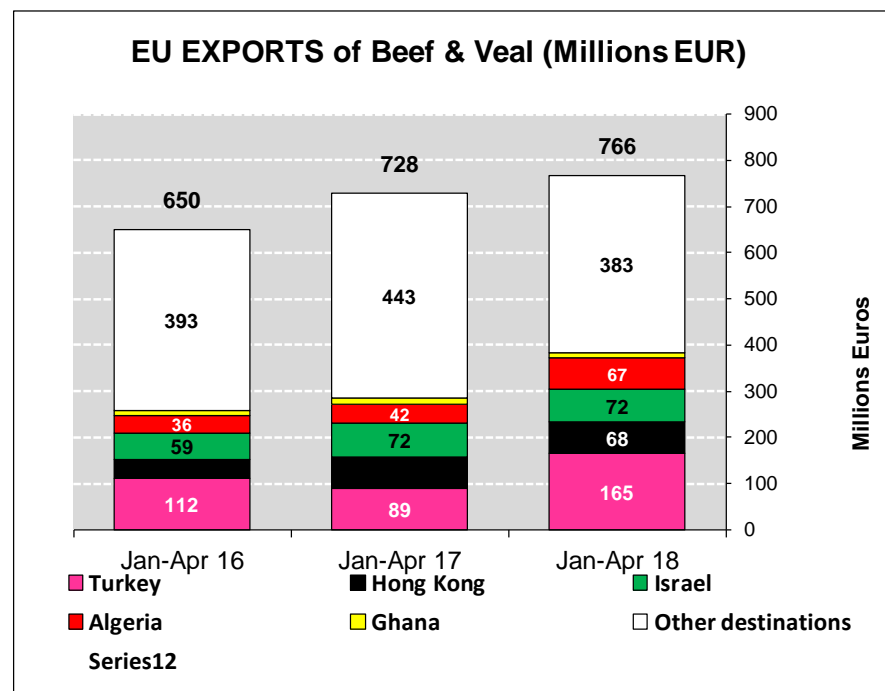
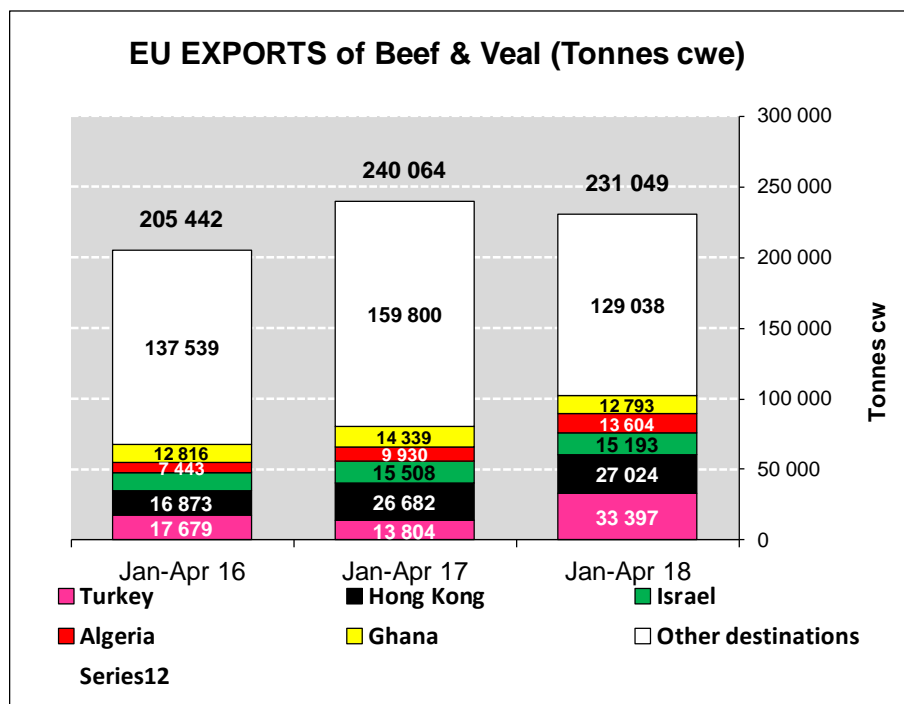
| Destinations       | 2014    |       | 2015    |       | 2016    |       | 2017    |       | Jan-Apr 18 |       | Compared<br>to Jan-Apr 17 |
|--------------------|---------|-------|---------|-------|---------|-------|---------|-------|------------|-------|---------------------------|
|                    | tonnes  | %     | tonnes  | %     | tonnes  | %     | tonnes  | %     | tonnes     | %     |                           |
| Hong Kong          | 28 573  | 8.2%  | 65 112  | 14.6% | 45 198  | 10.8% | 58 416  | 12.1% | 27 024     | 17.1% | + 1.3%                    |
| Ghana              | 40 878  | 11.8% | 33 255  | 7.5%  | 37 364  | 8.9%  | 35 340  | 7.3%  | 12 793     | 8.1%  | - 10.8%                   |
| Ivory Coast        | 21 619  | 6.2%  | 28 839  | 6.5%  | 35 740  | 8.5%  | 36 713  | 7.6%  | 12 429     | 7.9%  | - 4.5%                    |
| Turkey             | 559     | 0.2%  | 1 280   | 0.3%  | 9 482   | 2.3%  | 10 751  | 2.2%  | 12 377     | 7.8%  | +++                       |
| Philippines        | 2 534   | 0.7%  | 11 630  | 2.6%  | 13 053  | 3.1%  | 24 247  | 5.0%  | 9 475      | 6.0%  | - 18.2%                   |
| Bosnia-Herz.       | 21 870  | 6.3%  | 31 821  | 7.1%  | 36 593  | 8.7%  | 36 850  | 7.6%  | 8 328      | 5.3%  | - 15.8%                   |
| Switzerland        | 25 817  | 7.4%  | 25 730  | 5.8%  | 25 009  | 6.0%  | 24 435  | 5.1%  | 7 511      | 4.7%  | - 10.8%                   |
| Israel             | 4 224   | 1.2%  | 3 855   | 0.9%  | 6 087   | 1.5%  | 15 137  | 3.1%  | 5 932      | 3.8%  | + 1.5%                    |
| Angola             | 10 589  | 3.0%  | 14 587  | 3.3%  | 9 643   | 2.3%  | 13 549  | 2.8%  | 4 635      | 2.9%  | + 10.7%                   |
| Norway             | 10 217  | 2.9%  | 7 872   | 1.8%  | 19 122  | 4.6%  | 18 315  | 3.8%  | 4 635      | 2.9%  | - 27.0%                   |
| Chile              | 1       | 0.0%  | 27      | 0.0%  | 50      | 0.0%  | 2 228   | 0.5%  | 4 372      | 2.8%  | + 73.8%                   |
| South Africa       | 3 339   | 1.0%  | 1 325   | 0.3%  | 7 481   | 1.8%  | 7 361   | 1.5%  | 4 105      | 2.6%  | + 32.7%                   |
| Algeria            | 3 135   | 0.9%  | 4 227   | 0.9%  | 6 662   | 1.6%  | 10 726  | 2.2%  | 3 006      | 1.9%  | - 43.4%                   |
| Ukraine            | 2 870   | 0.8%  | 2 498   | 0.6%  | 2 747   | 0.7%  | 7 094   | 1.5%  | 2 922      | 1.8%  | + 16.8%                   |
| For.JRep.Mac       | 10 315  | 3.0%  | 10 994  | 2.5%  | 12 375  | 3.0%  | 11 451  | 2.4%  | 2 839      | 1.8%  | - 12.8%                   |
| China              | 7 228   | 2.1%  | 8 242   | 1.9%  | 6 027   | 1.4%  | 10 804  | 2.2%  | 2 325      | 1.5%  | - 20.8%                   |
| USA                | 396     | 0.1%  | 940     | 0.2%  | 2 633   | 0.6%  | 3 855   | 0.8%  | 1 753      | 1.1%  | + 17.1%                   |
| Other Destinations | 153 090 | 44.1% | 193 039 | 43.4% | 143 118 | 34.2% | 154 572 | 32.1% | 31 715     | 20.1% |                           |
| Extra-EU           | 347 252 |       | 445 272 |       | 418 383 |       | 481 846 |       | 158 176    |       |                           |
| % change           |         |       | + 28%   |       | - 6%    |       | + 15%   |       | - 9.8%     |       |                           |

# TRADE

# EU EXPORTS

## Beef & Live Animals

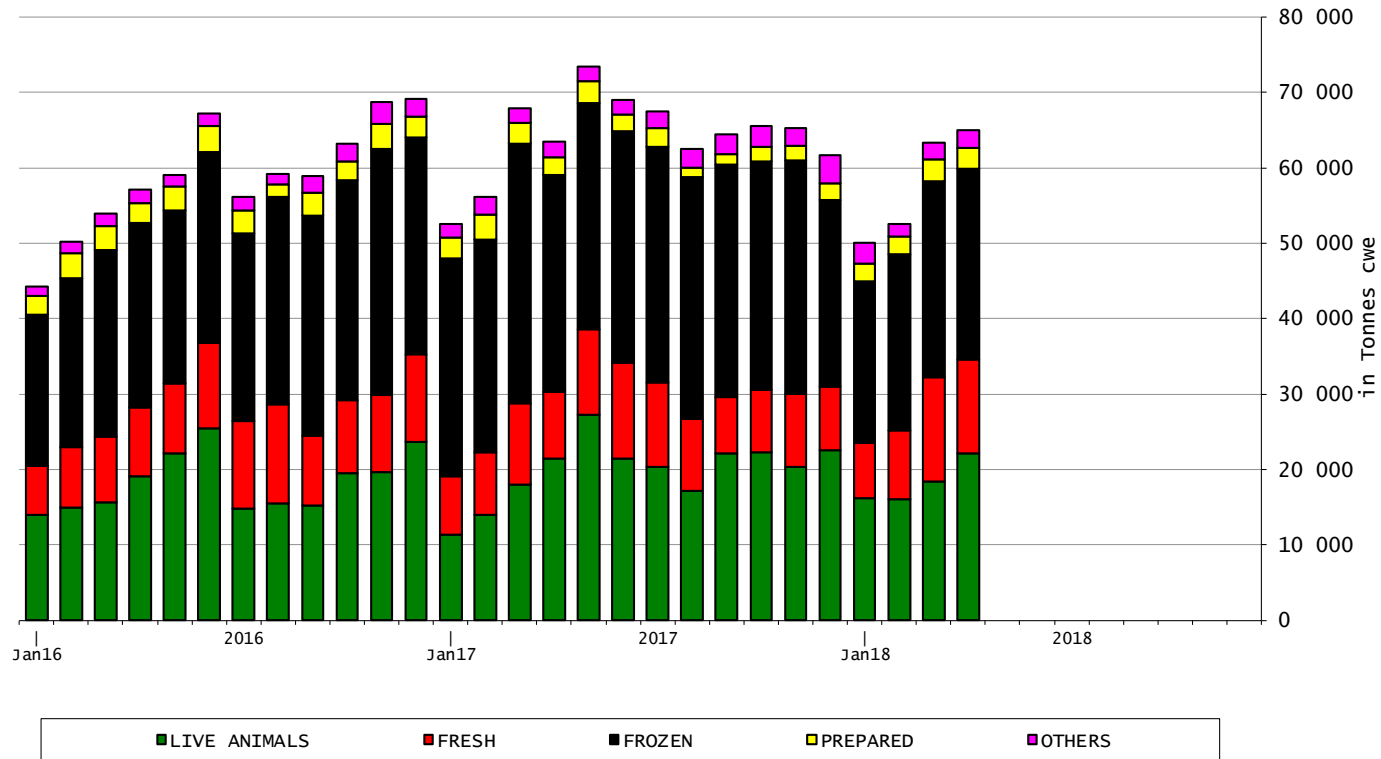
### EU exports of beef and live animals: Trade figures (COMEXT)



# TRADE

## EU EXPORTS Beef Products

EU-28 Exports of BEEF products



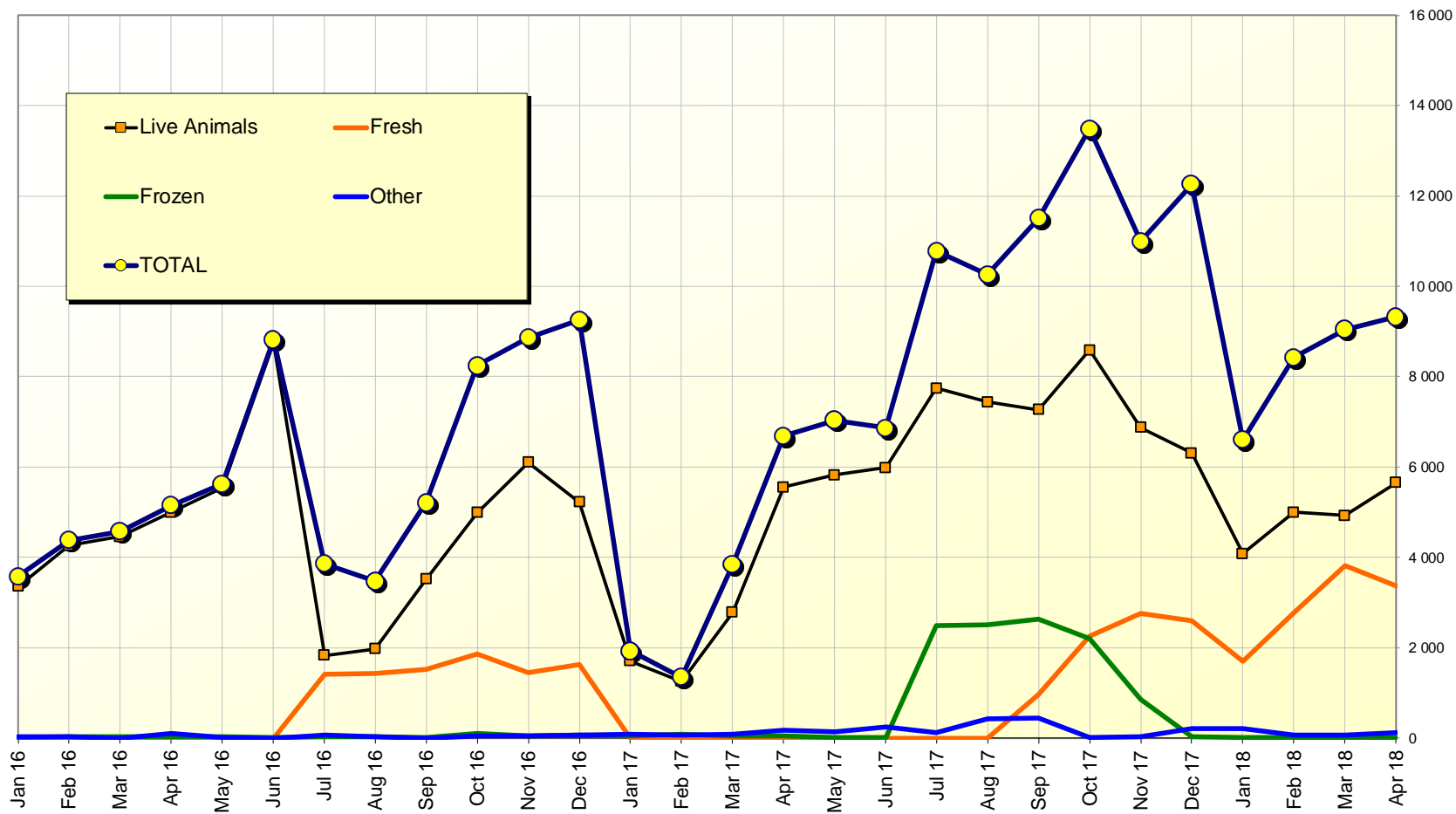
25 June 2018

# TRADE

# EU EXPORTS

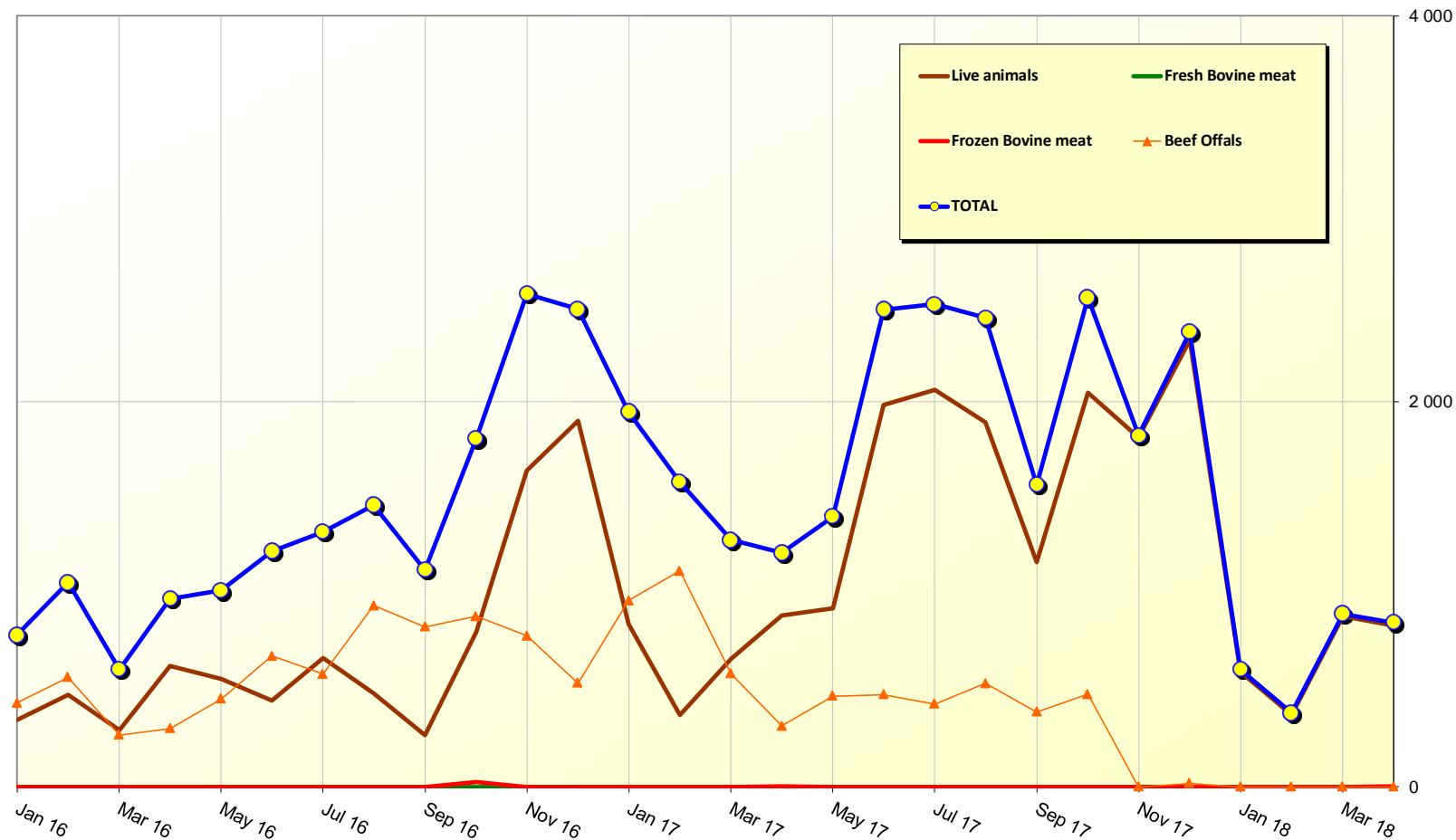
## Beef to TURKEY

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



25 June 2018

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

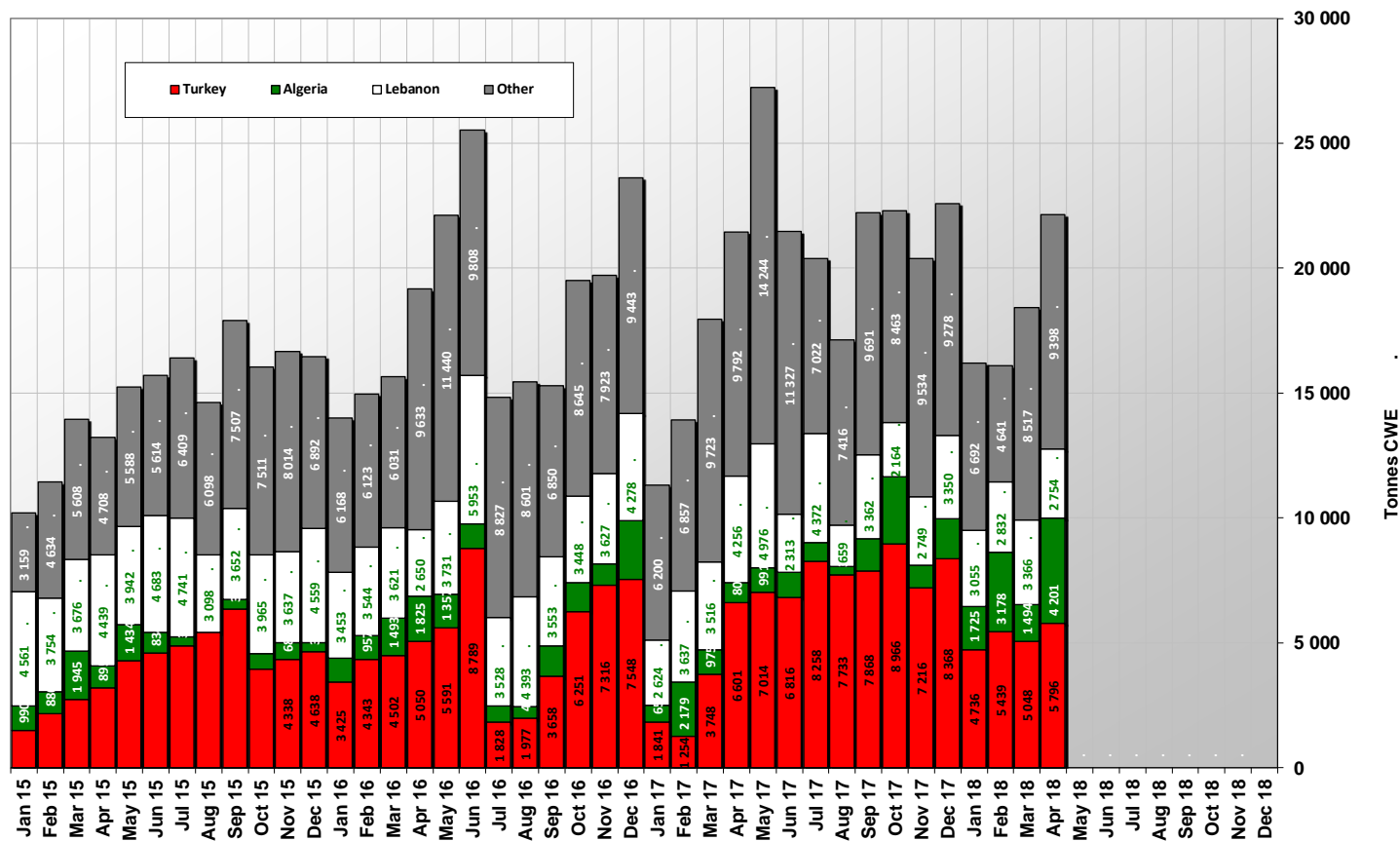


25 June 2018

# TRADE

# EU EXPORTS Live Animals

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

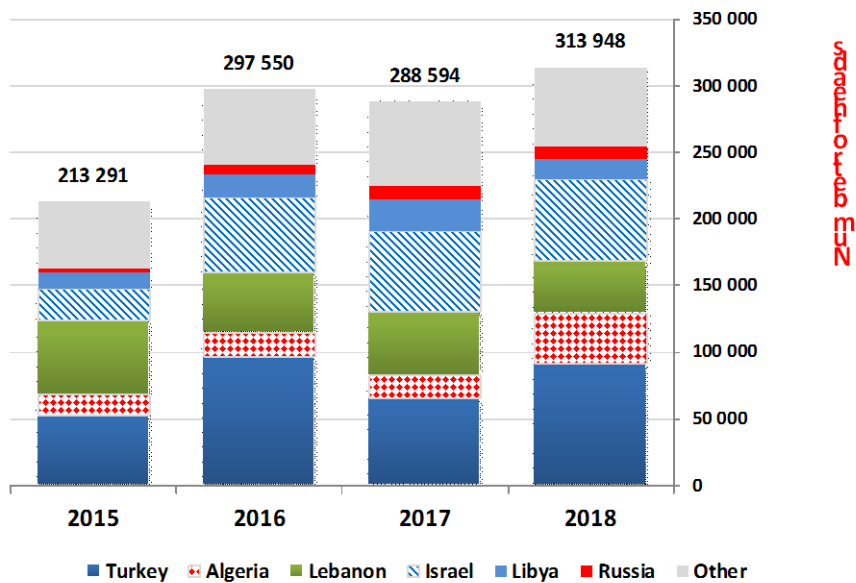


25 June 2018

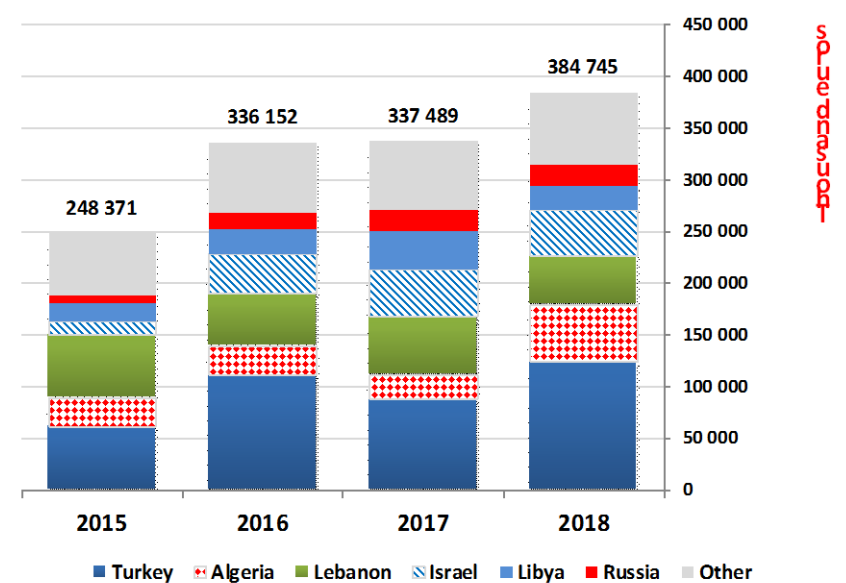
# TRADE

# EU EXPORTS Live Animals

EU Exports of BEEF live animals by partner for the period Jan-Apr 2018



EU Exports of BEEF live animals by partner for the period Jan-Apr 2018



25 June 2018

# TRADE

# EU IMPORTS

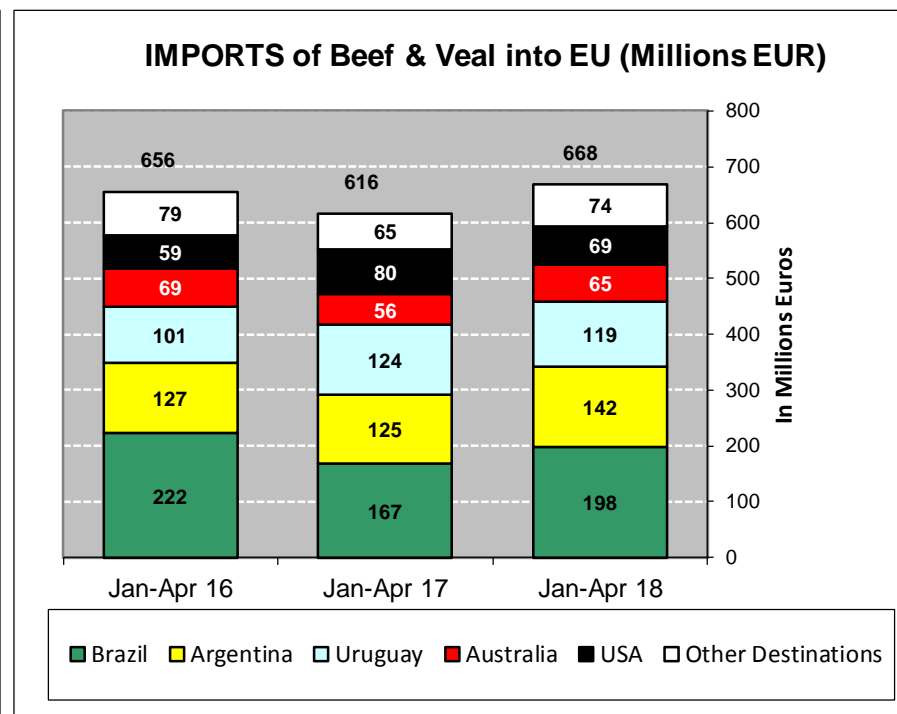
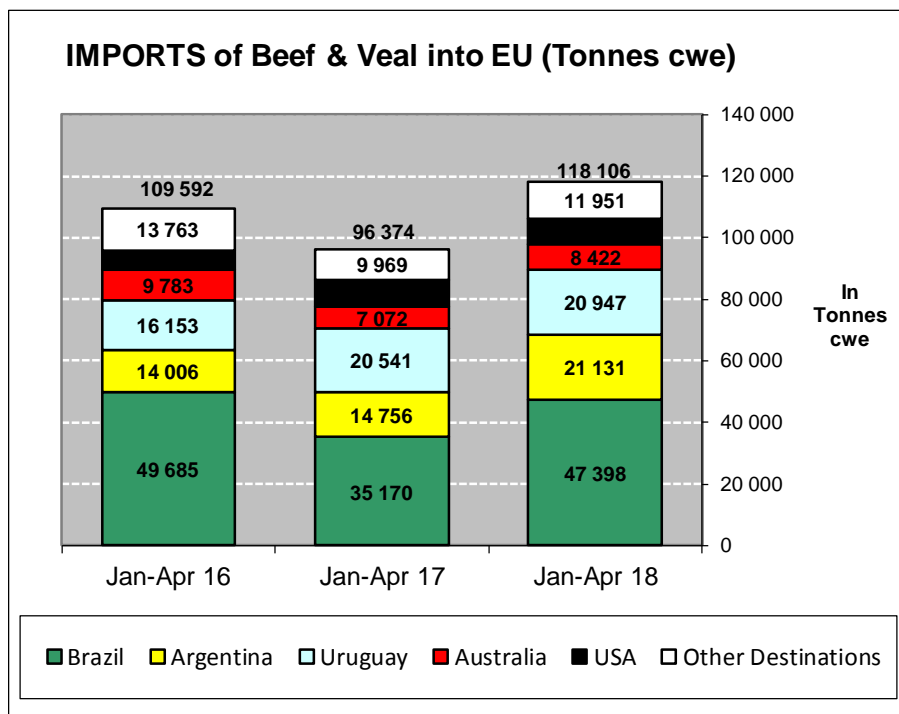
## Beef & Live Animals

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

| Origins       | 2014    |       | 2015    |       | 2016    |       | 2017    |       | Jan-Apr 18 |       | Compared<br>to Jan-Apr 17 |
|---------------|---------|-------|---------|-------|---------|-------|---------|-------|------------|-------|---------------------------|
|               | tonnes  | %     | tonnes  | %     | tonnes  | %     | tonnes  | %     | tonnes     | %     |                           |
| Brazil        | 145 435 | 43.5% | 144 259 | 43.4% | 136 803 | 42.3% | 140 291 | 42.0% | 47 398     | 40.1% | + 34.8%                   |
| Argentina     | 47 976  | 14.3% | 42 074  | 12.7% | 42 149  | 13.0% | 43 558  | 13.0% | 21 131     | 17.9% | + 43.2%                   |
| Uruguay       | 51 377  | 15.4% | 49 043  | 14.8% | 46 287  | 14.3% | 56 703  | 17.0% | 20 947     | 17.7% | + 2.0%                    |
| Australia     | 28 074  | 8.4%  | 32 653  | 9.8%  | 30 884  | 9.6%  | 27 794  | 8.3%  | 8 422      | 7.1%  | + 19.1%                   |
| USA           | 22 297  | 6.7%  | 23 234  | 7.0%  | 24 132  | 7.5%  | 20 482  | 6.1%  | 8 256      | 7.0%  | - 6.9%                    |
| New Zealand   | 13 827  | 4.1%  | 14 432  | 4.3%  | 11 380  | 3.5%  | 9 906   | 3.0%  | 2 922      | 2.5%  | + 0.3%                    |
| Paraguay      | 0       | 0.0%  | 0       | 0.0%  | 1 915   | 0.6%  | 5 947   | 1.8%  | 2 274      | 1.9%  | + 35.0%                   |
| Botswana      | 6 280   | 1.9%  | 6 424   | 1.9%  | 9 258   | 2.9%  | 9 382   | 2.8%  | 1 964      | 1.7%  | + 47.3%                   |
| Switzerland   | 4 284   | 1.3%  | 5 456   | 1.6%  | 5 090   | 1.6%  | 5 500   | 1.6%  | 1 818      | 1.5%  | + 12.5%                   |
| Namibia       | 11 113  | 3.3%  | 9 994   | 3.0%  | 12 112  | 3.7%  | 10 685  | 3.2%  | 1 700      | 1.4%  | + 26.0%                   |
| Canada        | 965     | 0.3%  | 780     | 0.2%  | 428     | 0.1%  | 421     | 0.1%  | 323        | 0.3%  | +++                       |
| Serbia        | 619     | 0.2%  | 425     | 0.1%  | 439     | 0.1%  | 557     | 0.2%  | 300        | 0.3%  | + 43.6%                   |
| Japan         | 3       | 0.0%  | 100     | 0.0%  | 359     | 0.1%  | 578     | 0.2%  | 170        | 0.1%  | - 10.4%                   |
| Other Origins | 2 379   | 0.7%  | 3 487   | 1.0%  | 1 810   | 0.6%  | 2 063   | 0.6%  | 480        | 0.4%  |                           |
| Extra-EU      | 334 630 |       | 332 362 |       | 323 043 |       | 333 868 |       | 118 106    |       |                           |
| % change      |         |       | - 1%    |       | - 3%    |       | + 3%    |       | + 22.5%    |       |                           |



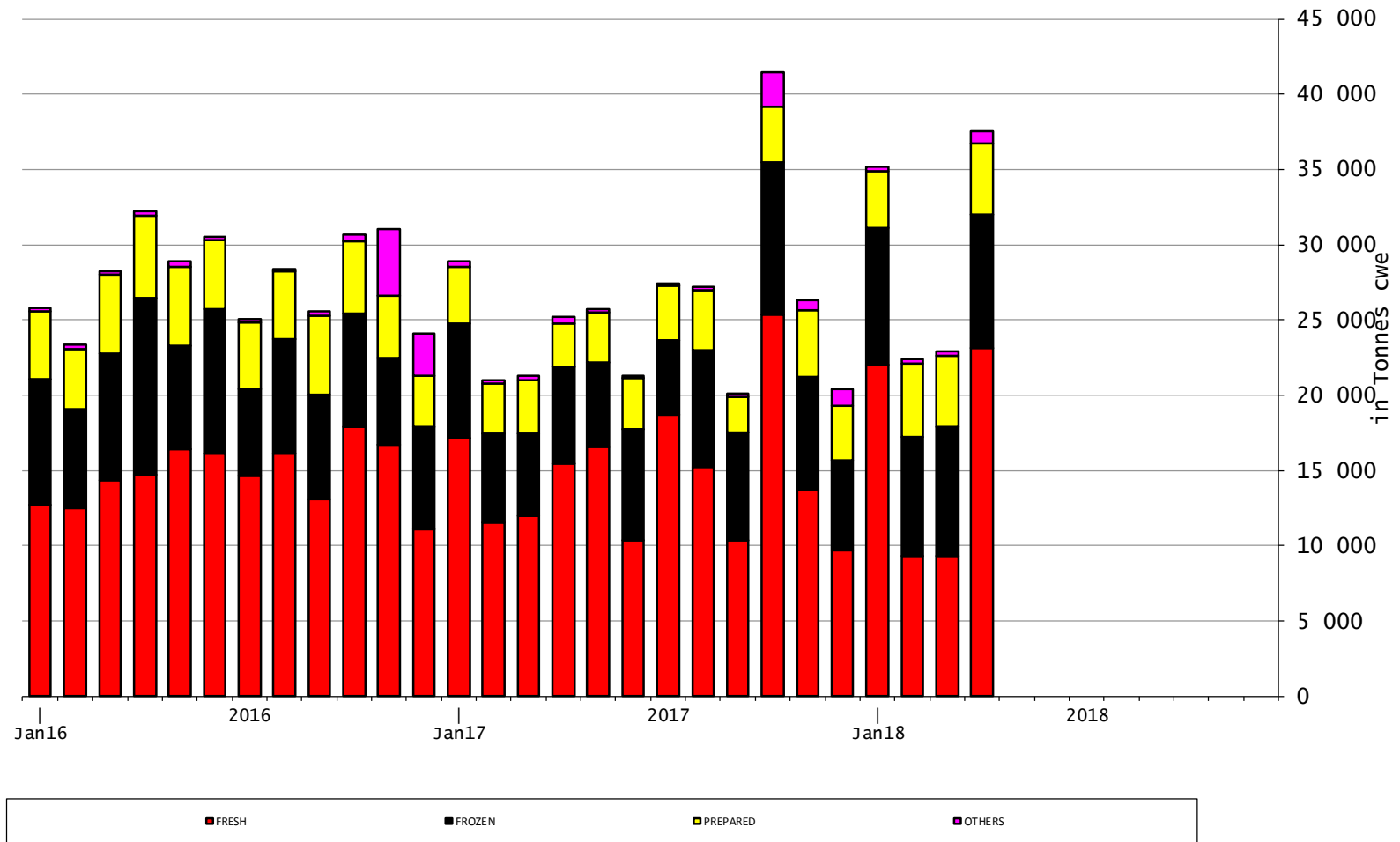
## EU imports of beef and live animals (2): Trade figures (COMEXT)



# TRADE

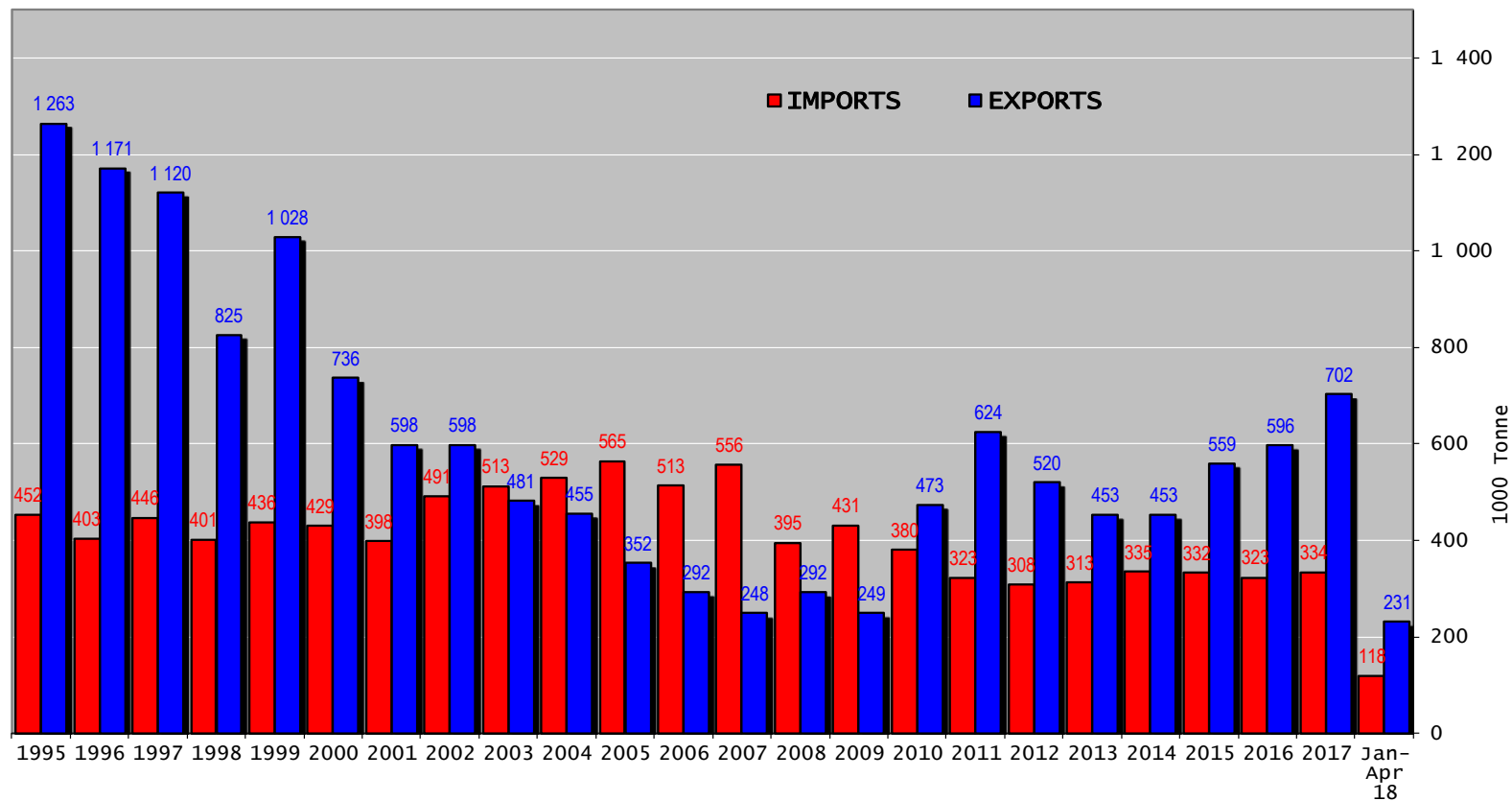
## EU IMPORTS Beef Products

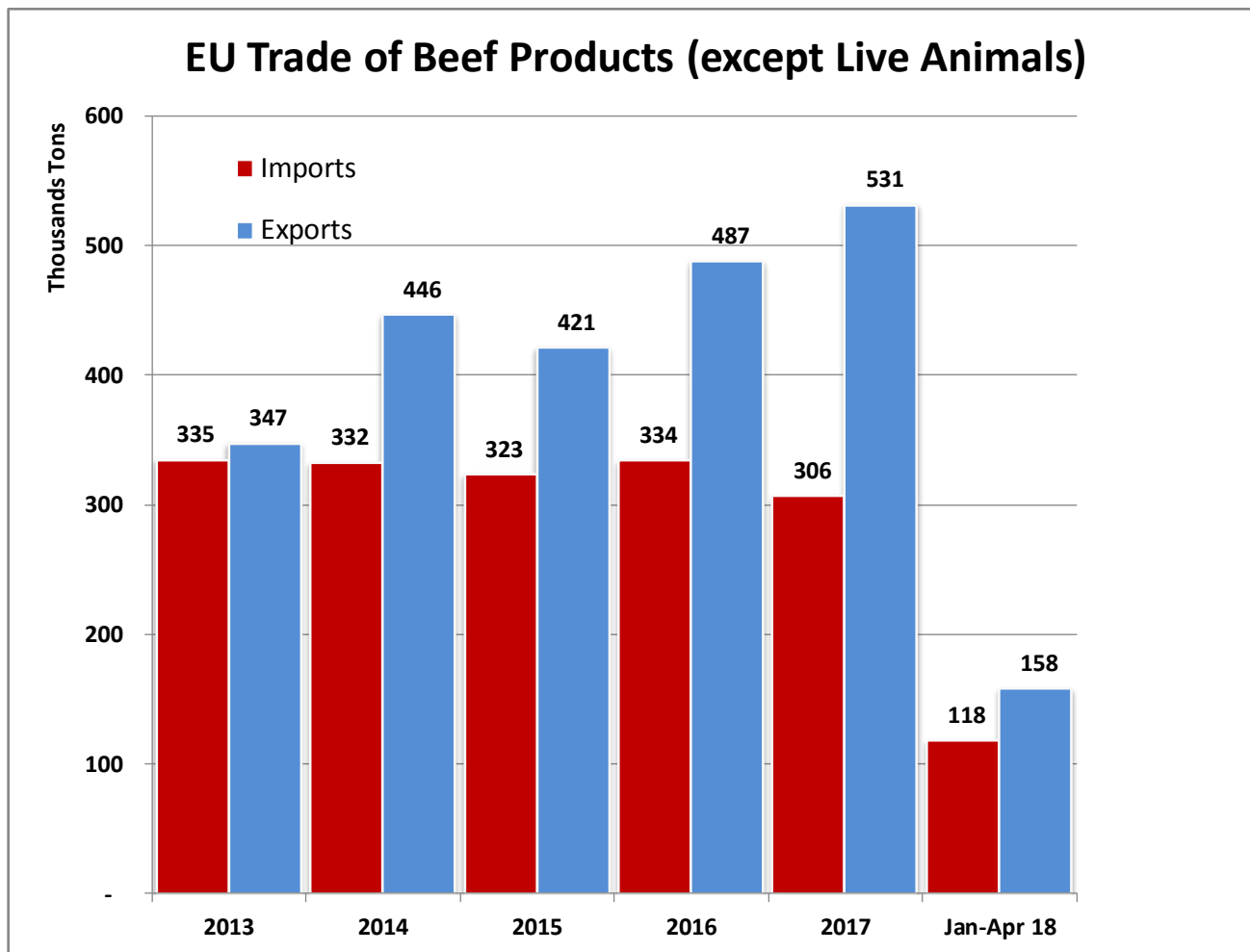
### EU-28 Imports of BEEF products



25 June 2018

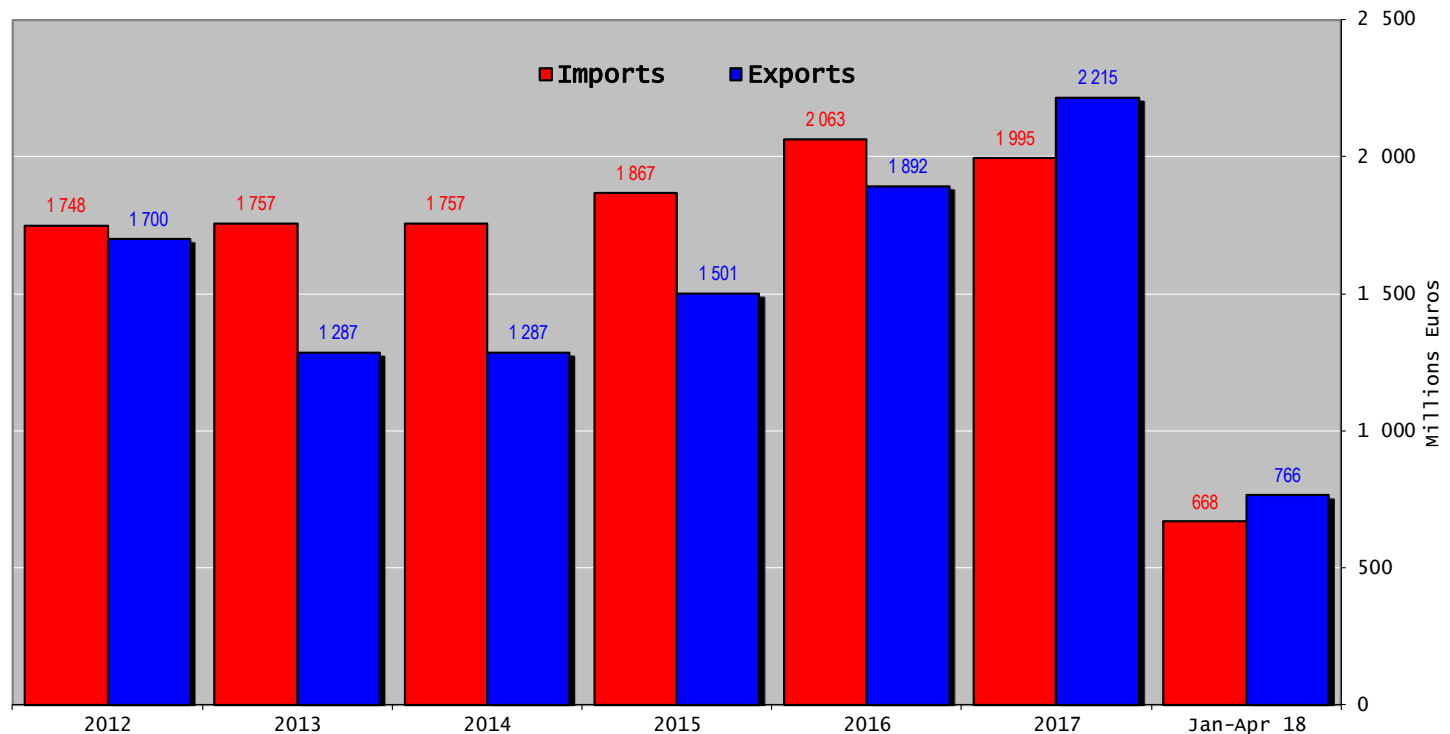
### Trade balance of beef and live animals



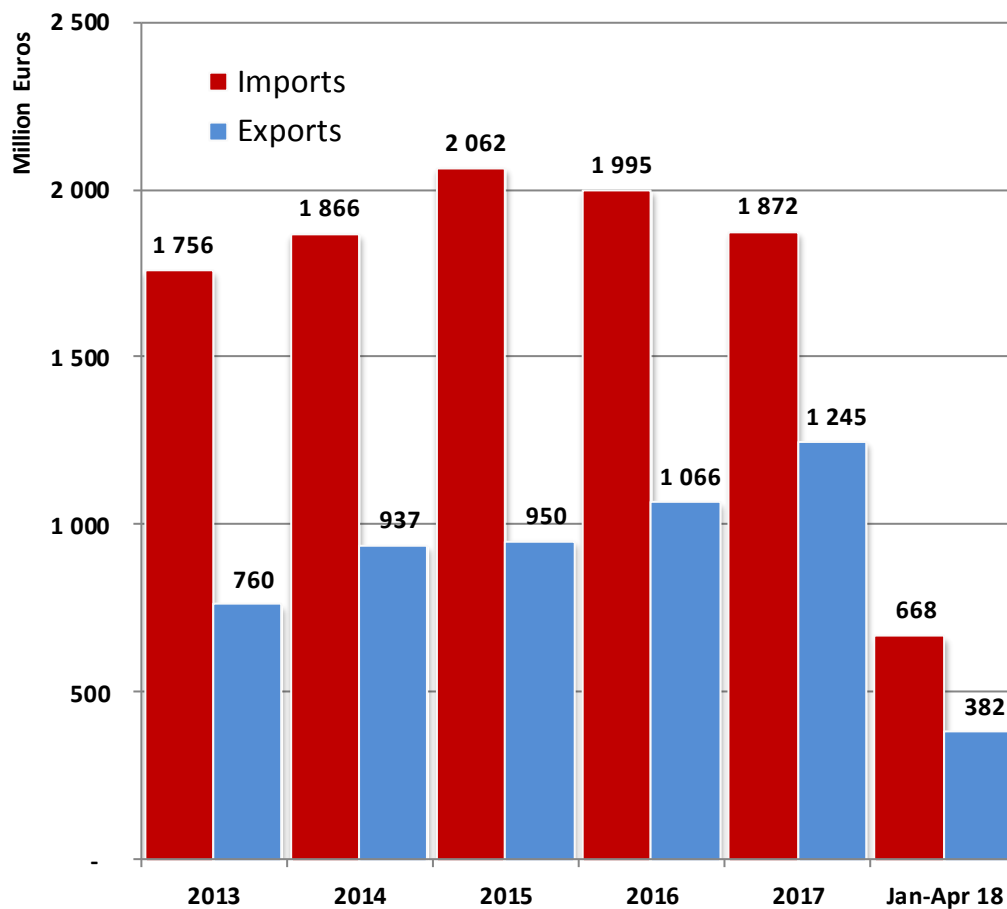


25 June 2018

### Trade balance of beef and live animals



## EU Trade of Beef Products (except Live Animals)

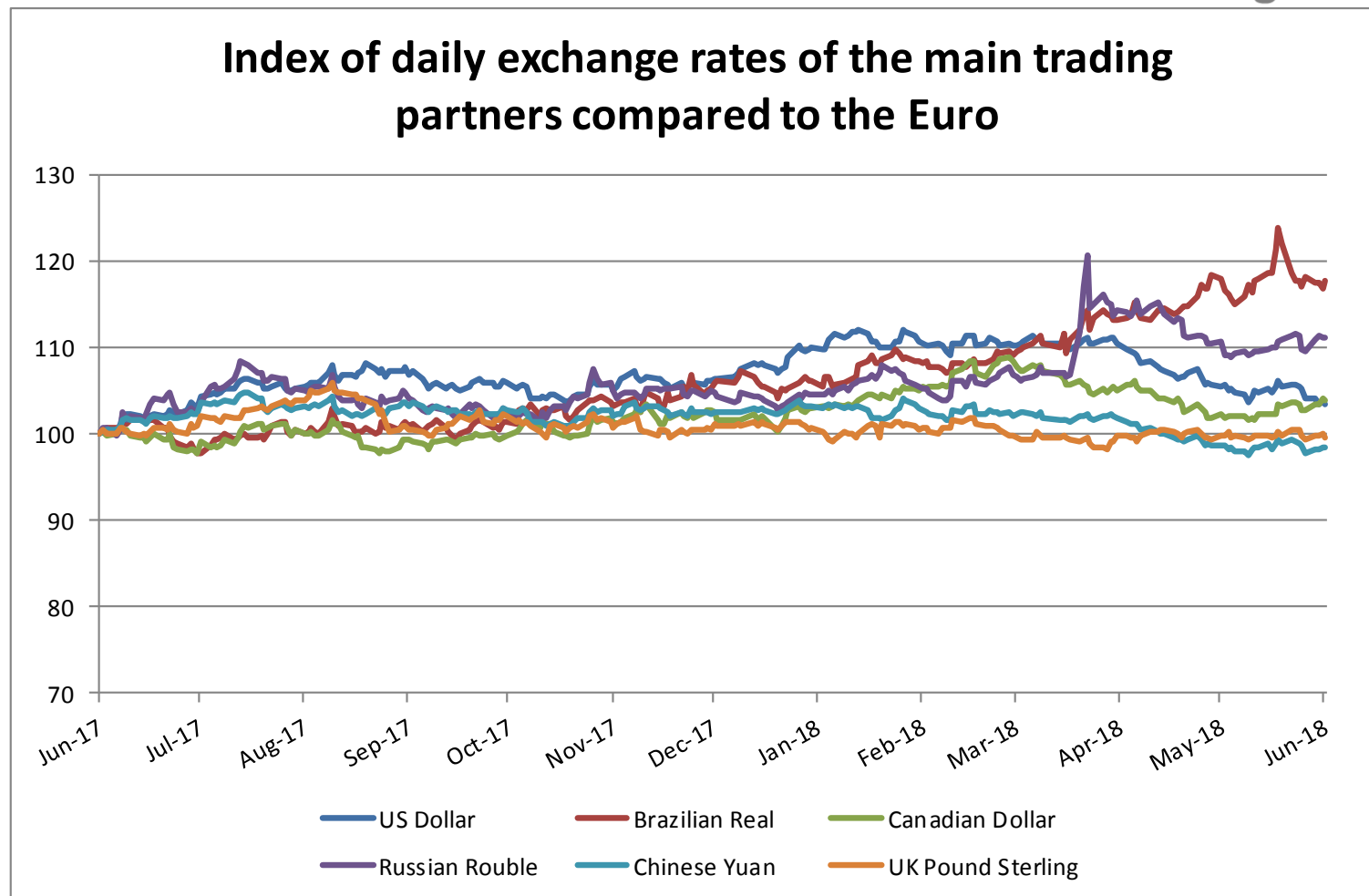


25 June 2018

# WORLD BEEF MARKET

EXCHANGE RATE INDEX / Euro

Main Trading Partners



Source : ECB

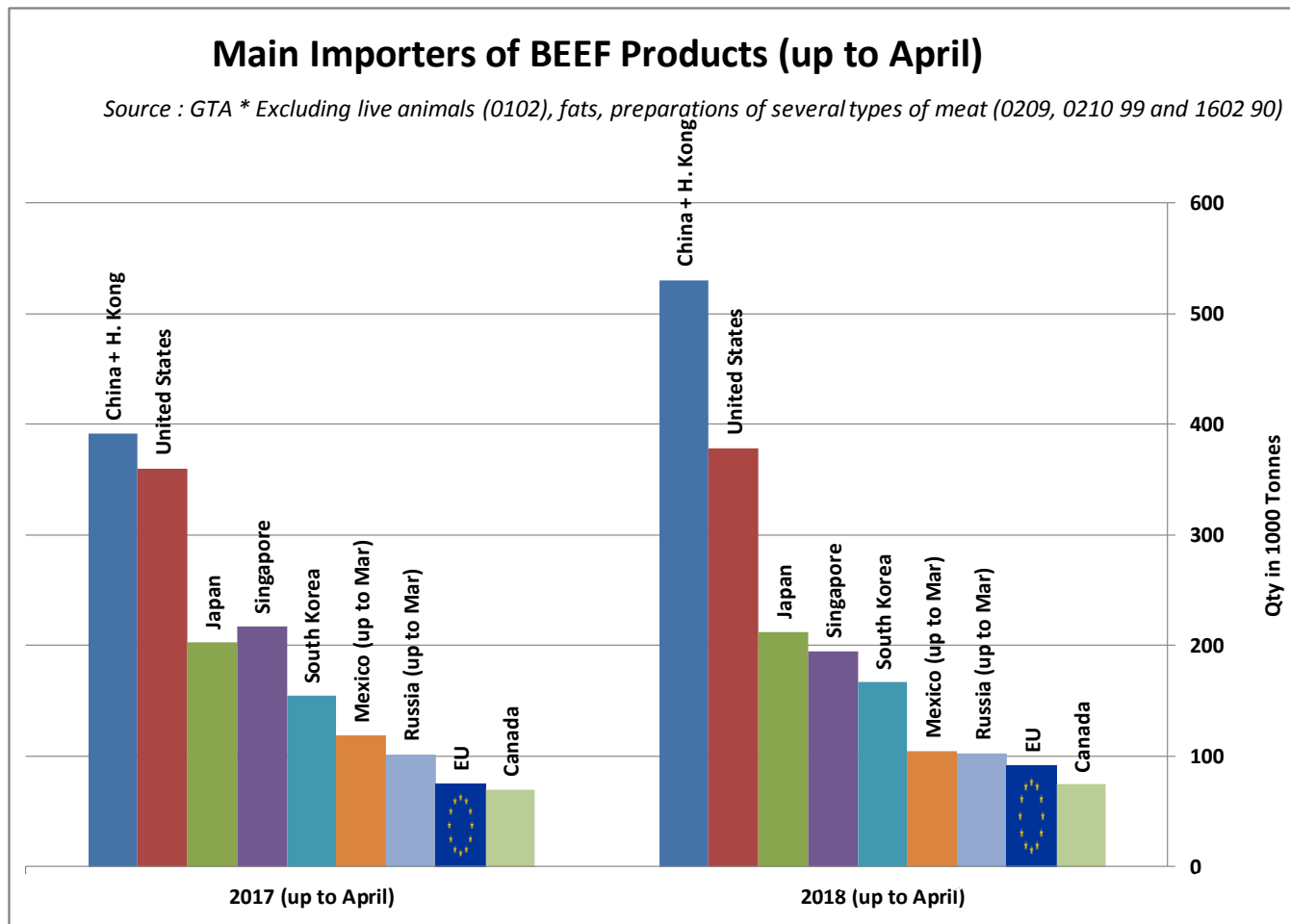
25 June 2018

# 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)



25 June 2018

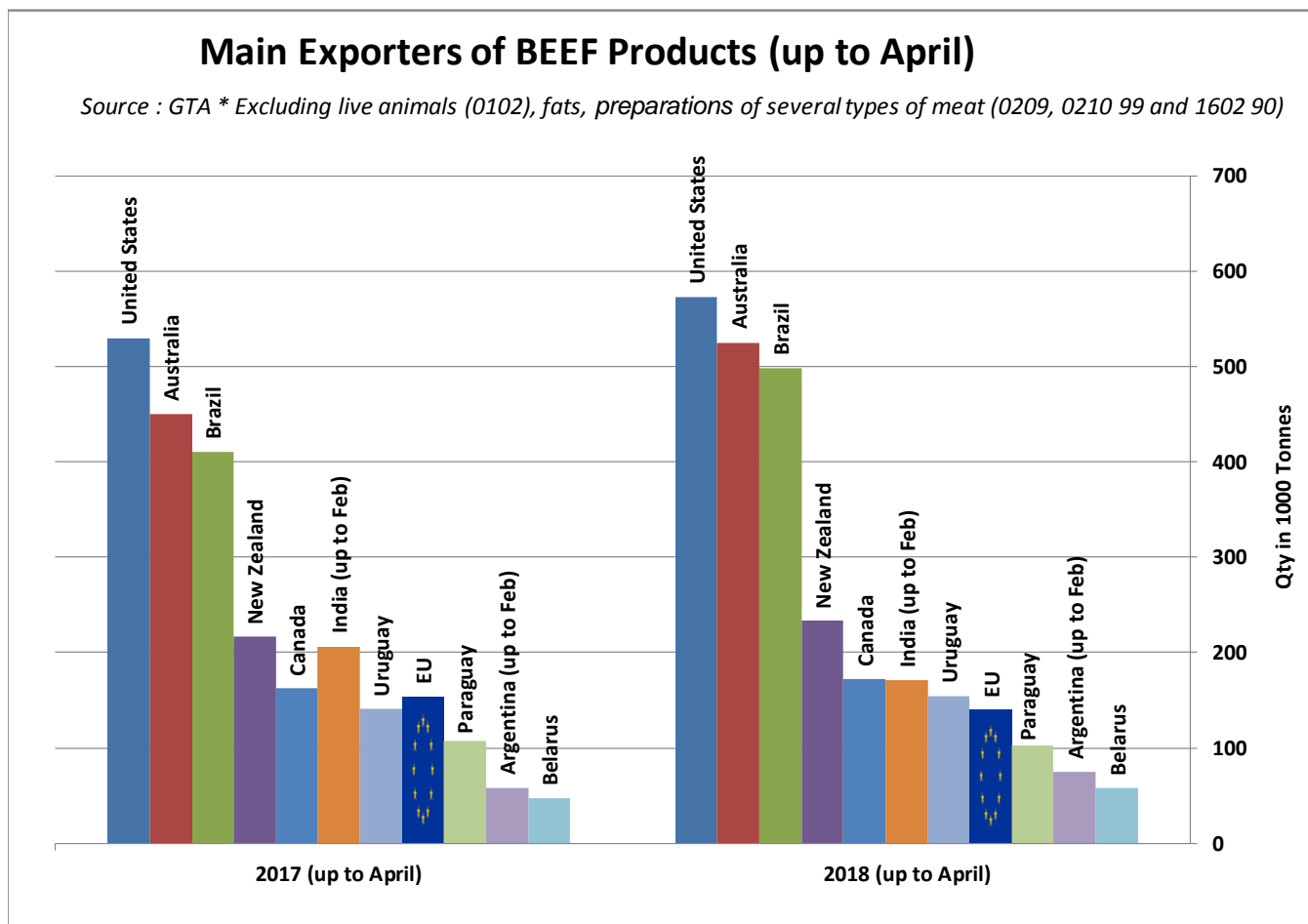


# WORLD BEEF MARKET

# E.U. EXPORTS BEEF MAIN EXPORTERS

Source : GTA

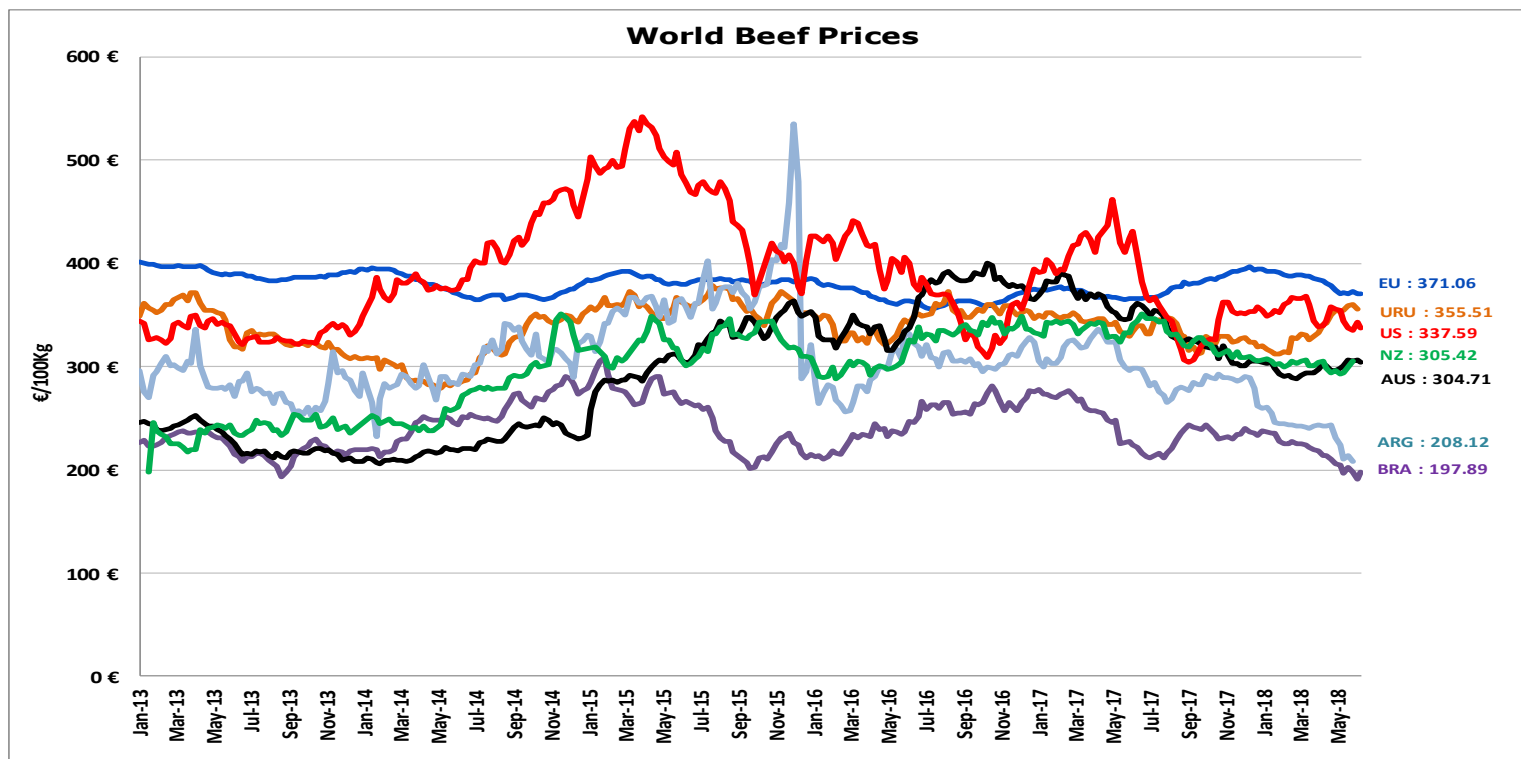
\* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



25 June 2018

# 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](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](http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html)

25 June 2018

# High Quality Beef Import Quotas

|                     | Quantity allocated<br>(Tons) | 2014/2015 |        | 2015/2016 |         | 2016/2017 |        | 2017/2018* |        |
|---------------------|------------------------------|-----------|--------|-----------|---------|-----------|--------|------------|--------|
|                     |                              | Use       |        | Use       |         | Use       |        | Use        |        |
| 09.4001 Australia   | 2 250                        |           |        |           |         |           |        |            |        |
| 09.4004 Argentina   | 200                          | 9.46      | 4.73%  | 12.21     | 6.11%   | 12.75     | 6.38%  | 10.99      | 5.50%  |
| 09.4450 Argentina   | 29 500                       | 22 867.03 | 77.52% | 22 350.61 | 75.76%  | 23 111.89 | 78.35% | 23 662.76  | 80.21% |
| 09.4451 Australia   | 7 150                        | 6 815.93  | 95.33% | 6 749.85  | 94.40%  | 4 051.04  | 56.66% | 4 723.77   | 66.07% |
| 09.4452 Uruguay     | 6 376                        | 6 280.98  | 98.51% | 6 249.09  | 98.01%  | 6 365.55  | 99.84% | 5 788.07   | 90.78% |
| 09.4453 Brazil      | 10 000                       | 7 989.89  | 79.90% | 9 289.17  | 92.89%  | 8 572.40  | 85.72% | 4 804.92   | 48.05% |
| 09.4454 New Zealand | 1 300                        | 1 299.45  | 99.96% | 1 299.95  | 100.00% | 1 161.63  | 89.36% | 989.06     | 76.08% |
| 09.4002 Canada/US   | 11 500                       | 353.46    | 3.07%  | 292.16    | 2.54%   | 421.40    | 3.66%  | 2 351.37   | 20.45% |
| 09.4455 Paraguay    | 1 000                        | 12.13     | 1.21%  | 915.63    | 91.56%  | 982.60    | 98.26% | 920.13     | 92.01% |
| Total Beef          | 66 826                       | 45 618.87 | 68.27% | 47 146.46 | 70.55%  | 44 666.51 | 66.84% | 43 240.08  | 64.71% |
| Total Buffalo       | 2 450                        | 9.46      | 0.39%  | 12.21     | 0.50%   | 12.75     | 0.52%  | 10.99      | 0.45%  |
| Total               | 69 276                       | 45 628.33 | 65.86% | 47 158.67 | 68.07%  | 44 679.26 | 64.49% | 43 251.07  | 62.43% |

\* up to 30/04/2018

25 June 2018

# High Quality Beef Import Quotas

Quota erga omnes

Regulation (EU) No 481/2012

|                  | 2013-Q3    | 2013-Q4    | 2014-Q1    | 2014-Q2    | TOTAL      |
|------------------|------------|------------|------------|------------|------------|
| Period 2013-2014 | 10 198 942 | 10 493 437 | 10 191 527 | 10 282 860 | 41 166 765 |
| Available        | 12 050 000 | 12 050 000 | 12 050 000 | 12 050 000 | 48 200 000 |
| Use              | 84.64%     | 87.08%     | 84.58%     | 85.33%     | 85.41%     |

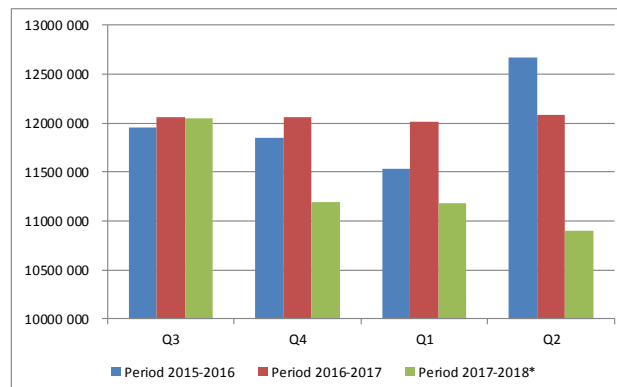
|                          | 2014-Q3    | 2014-Q4    | 2015-Q1    | 2015-Q2    | TOTAL      |
|--------------------------|------------|------------|------------|------------|------------|
| Period 2014-2015         | 11 842 700 | 11 745 231 | 11 353 830 | 12 457 389 | 47 399 150 |
| Available                | 12 050 000 | 12 050 000 | 12 050 000 | 12 050 000 | 48 200 000 |
| Use                      | 98.28%     | 97.47%     | 94.22%     | 103.38%    | 98.34%     |
| Available after transfer | 12 050 000 | 12 257 300 | 12 562 069 | 13 258 240 |            |
|                          | 98.28%     | 95.82%     | 90.38%     | 93.96%     |            |

|                          | 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 | 12 088 771 | 48 226 423 |
| 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 | 11 195 874 | 11 183 552 | 10 897 594 | 45 328 835 |
| Available                | 12 050 000 | 11 161 000 | 11 250 000 | 11 250 000 | 45 711 000 |
| Use                      | 100.00%    | 100.00%    | 99.41%     | 96.87%     | 99.16%     |
| Available after transfer | 12 050 000 | 11 159 185 | 11 215 126 | 11 316 448 |            |
|                          | 100.00%    | 100.00%    | 99.72%     | 96.30%     |            |

\* Until 15.06.2018



25 June 2018

# Forecast Summary

|                                           | 2016             | 2017             | 2018             | 2019             |
|-------------------------------------------|------------------|------------------|------------------|------------------|
| <b>EU.15 PRODUCTION</b><br>( 1000T )      | + 2,35%<br>6 966 | - 0,76%<br>6 913 | - 0,44%<br>6 883 | - 0,69%<br>6 835 |
| <b>EU.15 CONSUMPTION</b><br>( 1000T )     | - 1,92%<br>6 559 | + 0,59%<br>6 598 | + 0,28%<br>6 617 | + 0,26%<br>6 634 |
| <b>BALANCE</b>                            | 407              | 315              | 266              | 201              |
| <b>EU.13 PRODUCTION</b><br>( 1000T )      | + 7,14%<br>832   | + 5,96%<br>882   | + 4,56%<br>922   | + 1,20%<br>933   |
| <b>EU.13 CONSUMPTION</b><br>( 1000T )     | - 3,12%<br>396   | + 2,29%<br>405   | + 2,31%<br>415   | + 1,11%<br>419   |
| <b>BALANCE</b>                            | 436              | 477              | 508              | 514              |
| <b>EU.28 PRODUCTION</b><br>( 1000T )      | + 2,84%<br>7 798 | - 0,04%<br>7 795 | + 0,13%<br>7 805 | - 0,47%<br>7 768 |
| <b>EU.28 CONSUMPTION</b><br>( 1000T )     | - 1,99%<br>6 955 | + 0,69%<br>7 003 | + 0,40%<br>7 031 | + 0,31%<br>7 053 |
| <b>BALANCE</b>                            | 843              | 792              | 774              | 715              |
| <b>EU - CARCASS PRICES</b>                | 2016             | 2017             | 2018             | 2019             |
| <b>ADULT MALE BOVINES</b><br>( €/100 kg ) | - 4,3%<br>371,4  | + 2,56%<br>380,9 | + 1,31%<br>385,9 | + 0,48%<br>387,7 |
| <b>COWS</b><br>( €/100 kg )               | - 7,9%<br>268,6  | + 7,25%<br>288,1 | + 3,83%<br>299,2 | - 0,52%<br>297,6 |

Sources : EStat New Cronos, Member States

25 June 2018