

BEEF & VEAL MARKET SITUATION



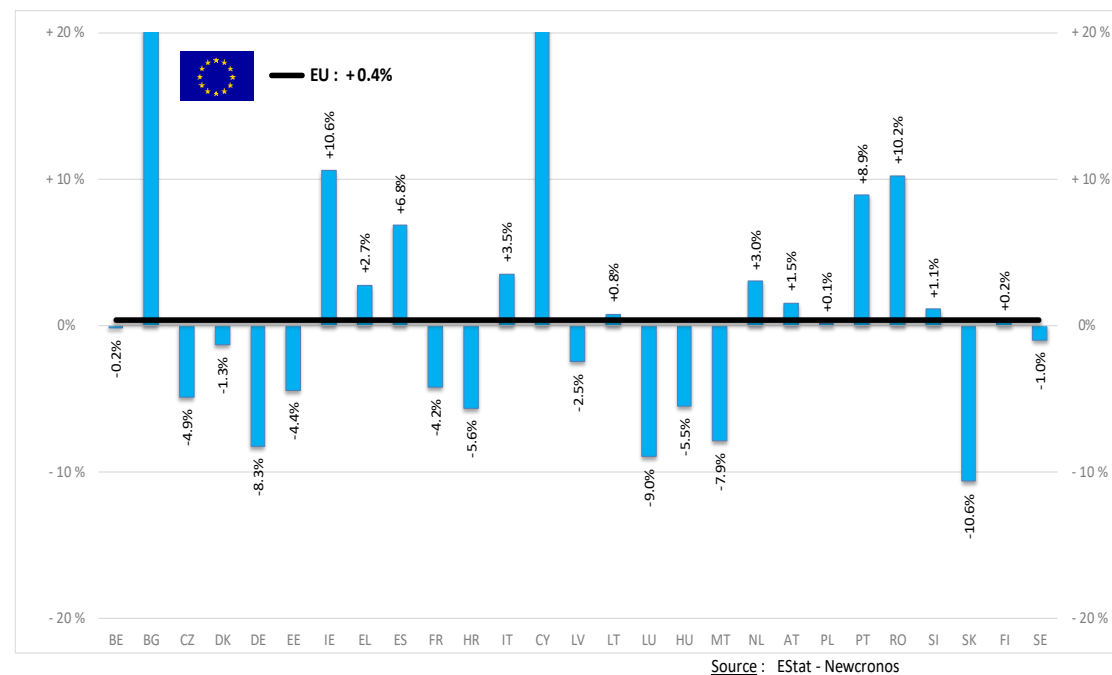
Beef CDG 16 September 2022

PRODUCTION

% EVOLUTION HEADS

HEADS	Jan-Jun 22/21
EU	
Bull	-2.5%
Bullock	+6.2%
Cow	+0.9%
Heifer	+2.7%
Calve	+1.0%
Young cattle	-0.4%
Meat of bovine animals	+0.4%

Estimates for last month of period : EL

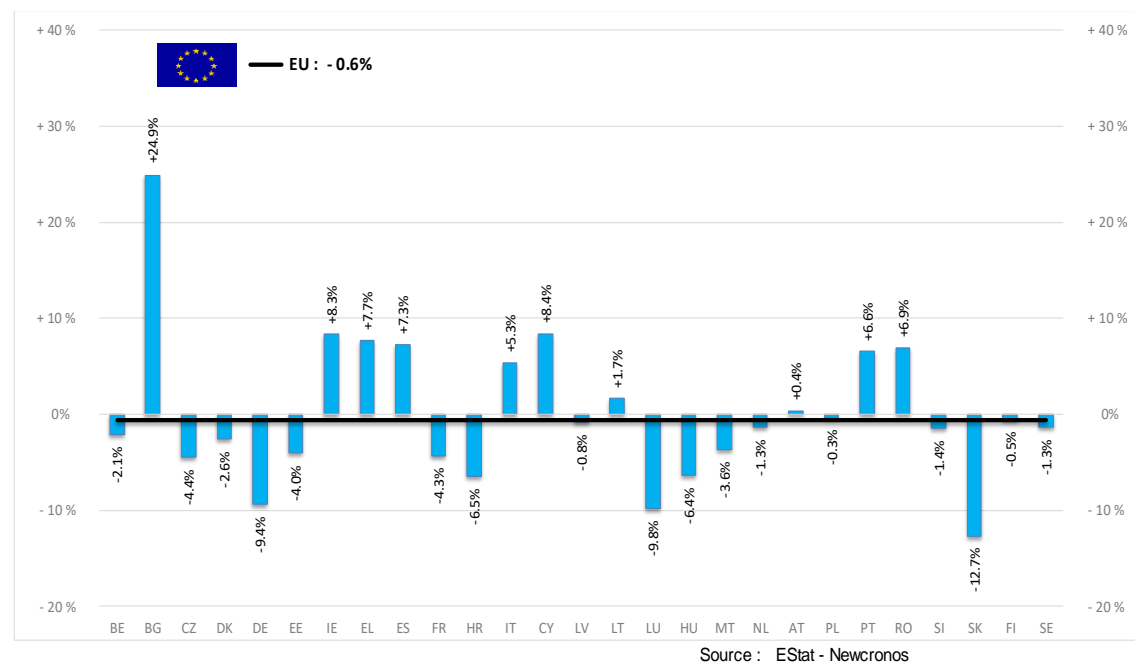


PRODUCTION

% EVOLUTION TONNES

TONNES	Jan-Jun 22/21
	EU
Bull	-2.7%
Bullock	+4.9%
Cow	-0.5%
Heifer	+2.1%
Calve	-0.0%
Young cattle	-0.8%
Meat of bovine animals	-0.6%

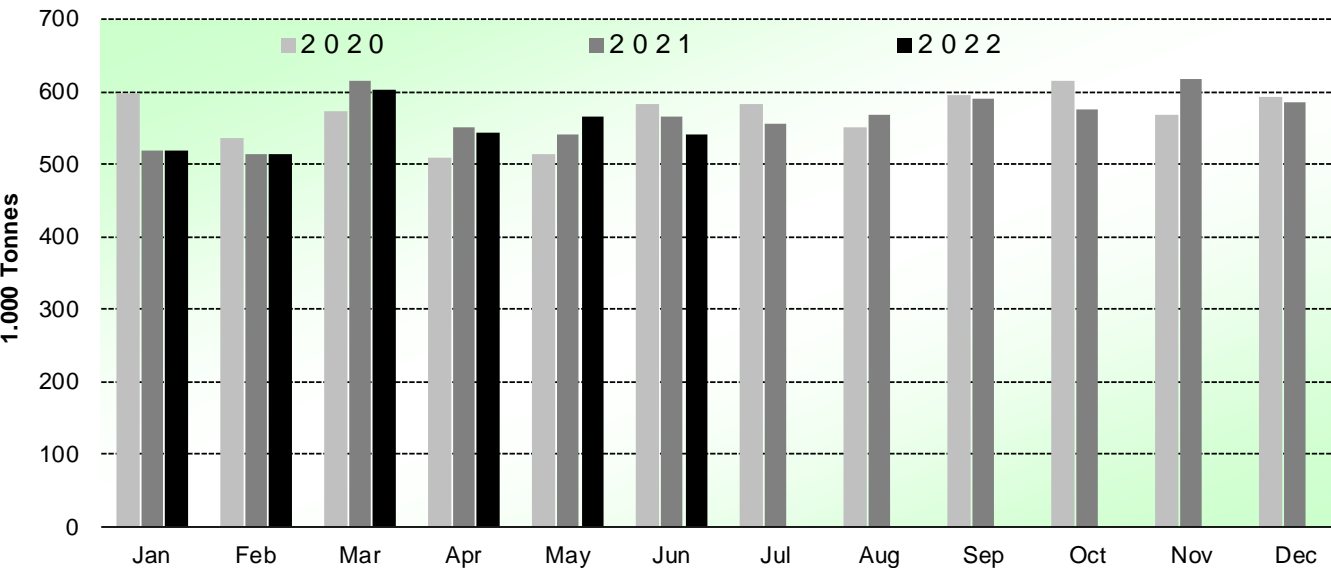
Estimates for last month of period : EL



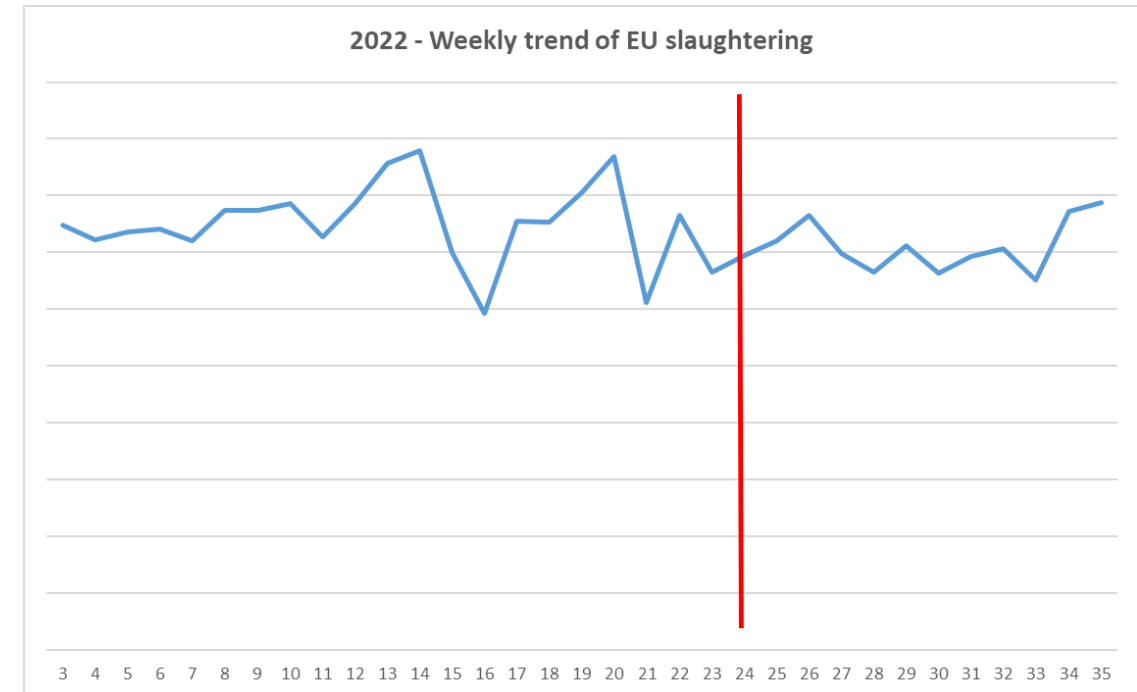
PRODUCTION

HISTORIC TONNES

Beef & Veal Production (EU Slaughtering) - Tonnes



Source: EStat-Newcronos



MS notifications – Reg. 2017/1185
Provisional data – subject to changes

16 September
2022

PRICES CARCASSES

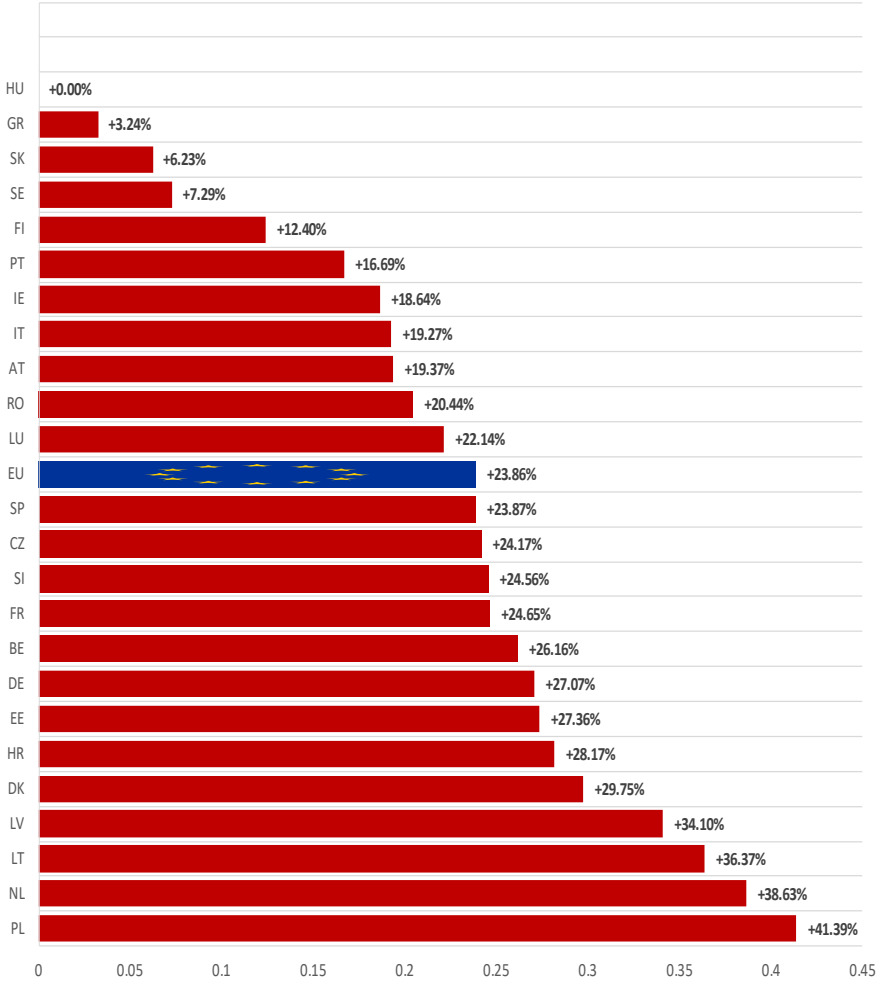
Dashboard

EU Prices week		35	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	492.8	€/100 kg	+ 0.6%	+ 0.7%	+ 26.6%
	Young Bovines (Z)	487.1		- 0.0%	+ 0.5%	+ 28.1%
	Young Bulls (A)	493.4		+ 0.4%	+ 1.0%	+ 27.8%
	Steers (C)	496.9		+ 3.0%	- 0.7%	+ 20.3%
	Cows (D)	444.6		- 0.6%	- 2.3%	+ 34.3%
	Heifers (E)	504.4		+ 0.0%	- 0.0%	+ 25.1%
	Calves slaughtered <8M	591.4		+ 0.4%	+ 1.9%	+ 16.3%
Live Animals	Male Calves Dairy Type	106.0	€/head	- 1.0%	- 14.0%	+ 5.4%
	Male Calves Beef Type	228.2		- 5.7%	- 6.1%	+ 4.8%
	Young Store Cattle	2.96	€/kg	- 3.4%	- 3.8%	+ 10.8%
	Yearling Male Store Cattle	3.44		- 3.4%	- 8.0%	- 1.1%
	Yearling Female Store Cattle	2.83		- 2.5%	- 5.6%	+ 8.8%

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

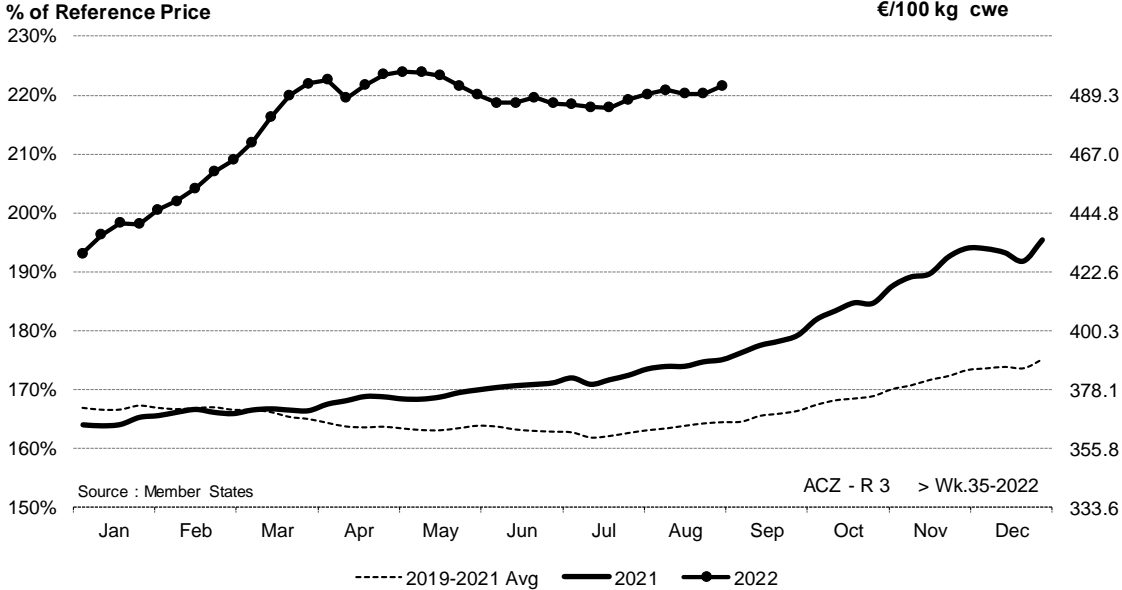
PRICES CARCASSES

EU ACZ R3 Price Comparison between average monthly price September 2021 - August 2022 compared to September 2020 - August 2021



EU EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.35-2022

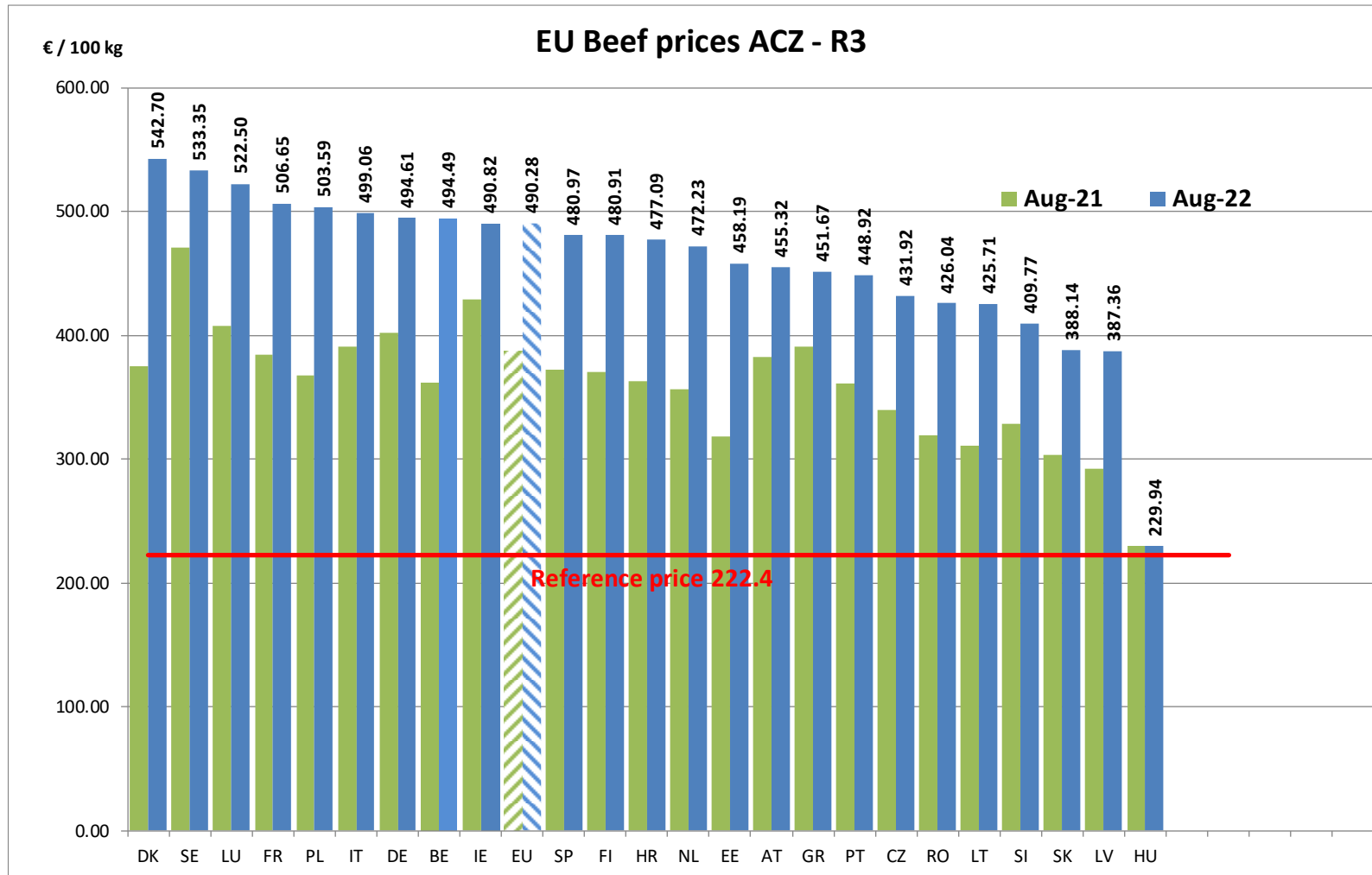


Price in week 35 : **492.80**
% change y/y : **+ 26.65%**
% Ref. Price in wk 0 : **221.6%**

Average price in August 2022 : **490.28**
% change y/y : **+ 26.76%**

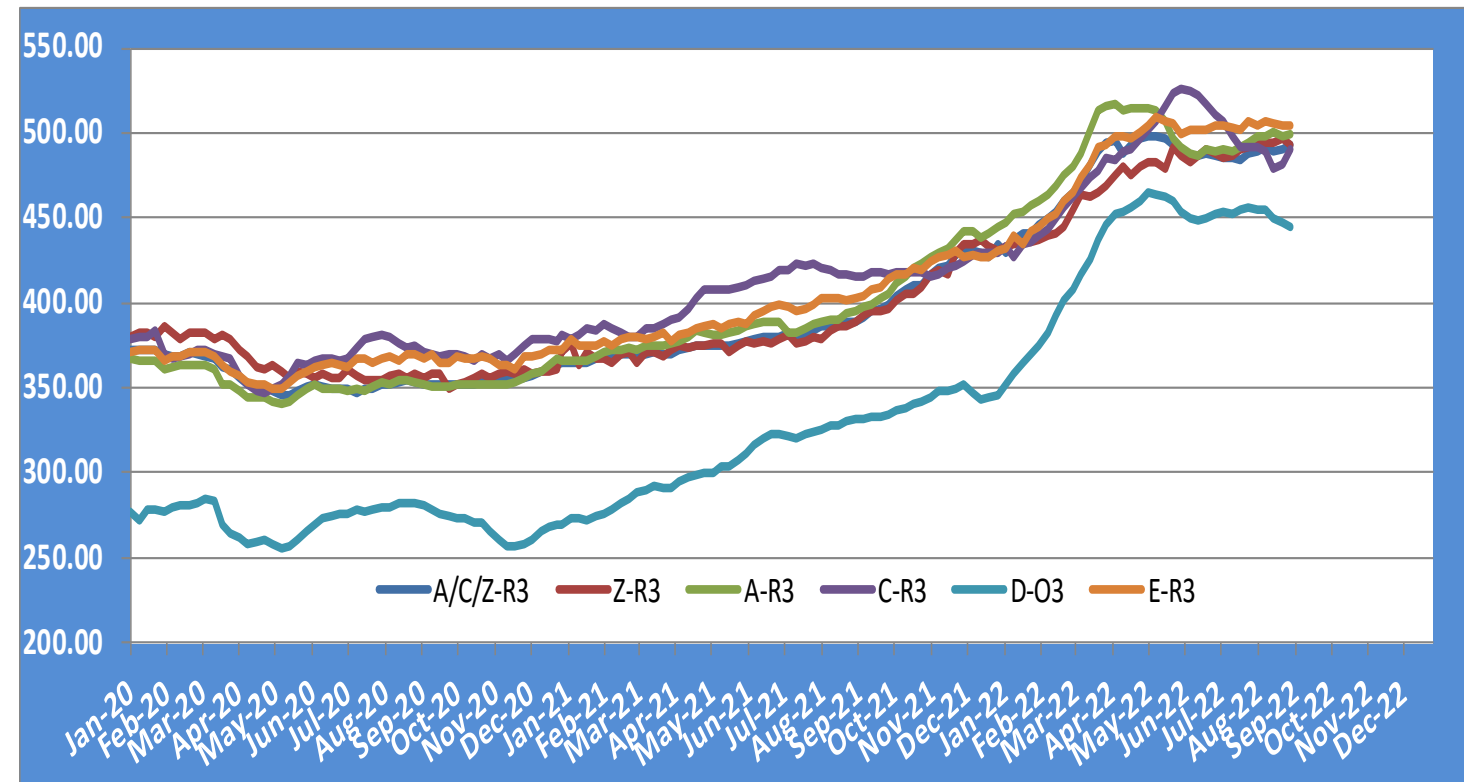
PRICES CARCASSES

EU EVOLUTION
A/C/Z.R3

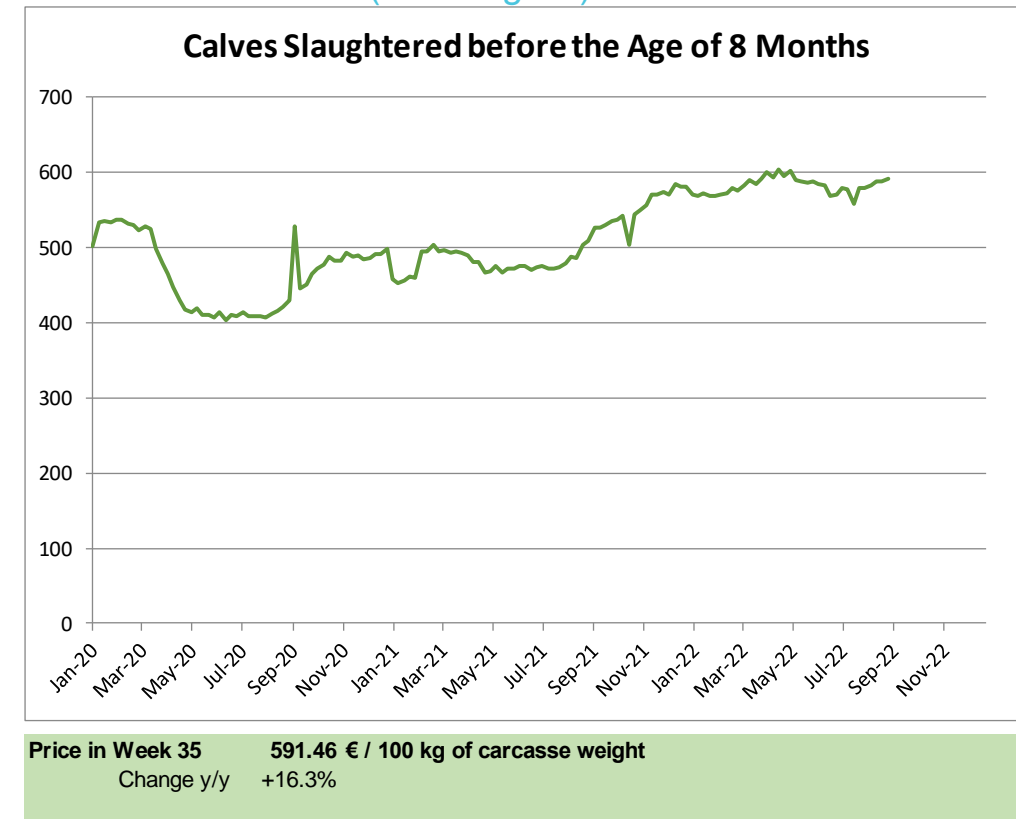


PRICES CARCASSES

EU EVOLUTION All CAT GLOBAL VIEW



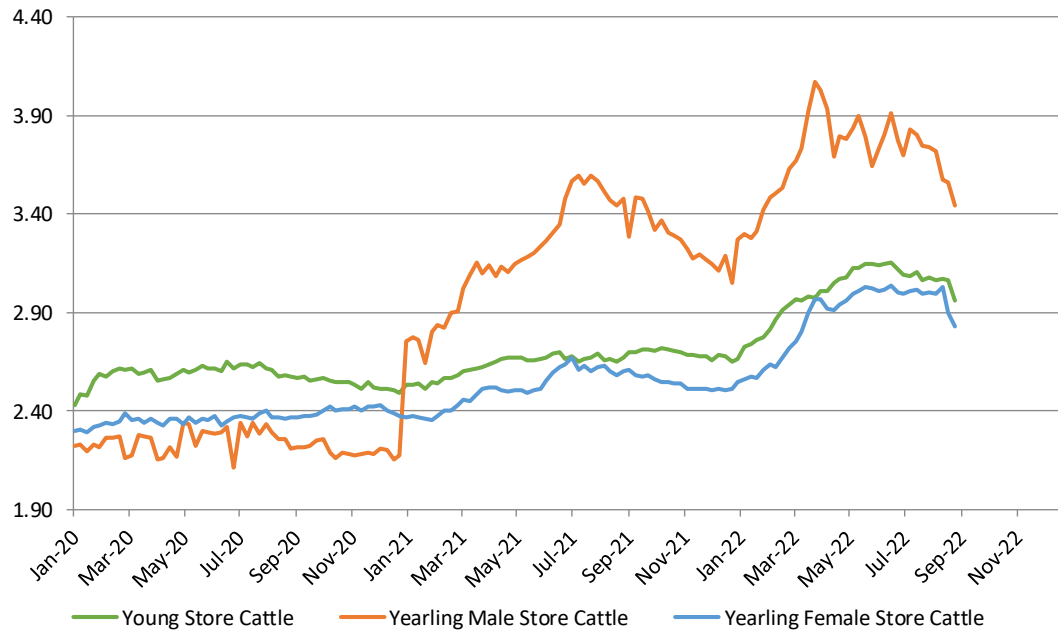
Calves slaughtered before the age of less than 8 months
(€/100 kg cw)



PRICES LIVE BOVINES

Store cattle (€/100 kg live weight)

Young Store Cattle Prices

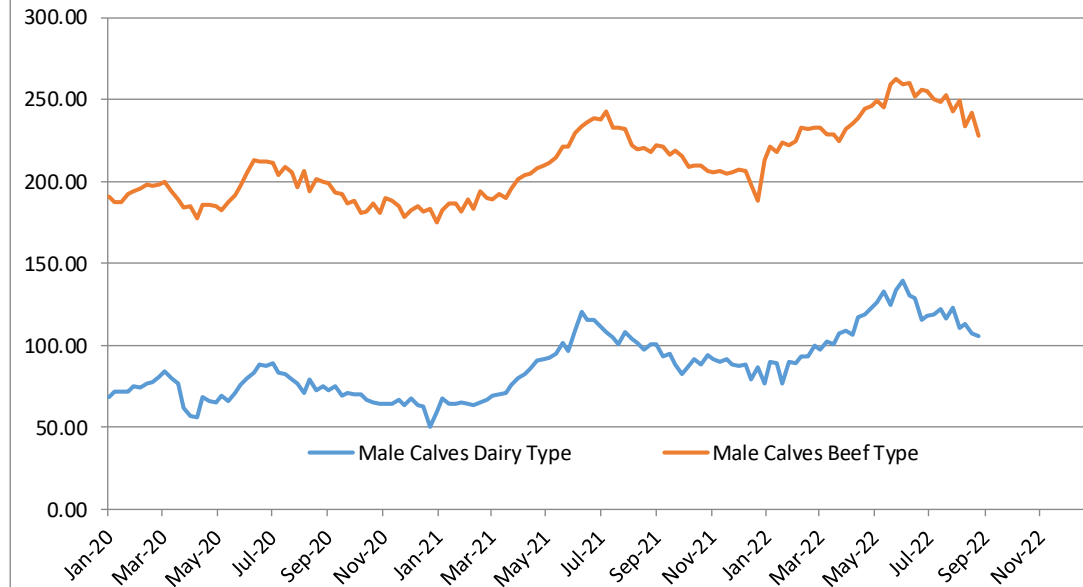


Young Store Cattle Price in Week 35	2.96	Yearling Male Store Cattle Price	3.44
Change y/y	+10.8%	Change y/y	-1.1%
Yearling Female Store Cattle Price	2.83		
Change y/y	+8.8%		

EU EVOLUTION

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

Male Rearing Calves Prices



Male Rearing Calves Beef type

Price in Week 35 **228.24**
Change y/y +4.8%

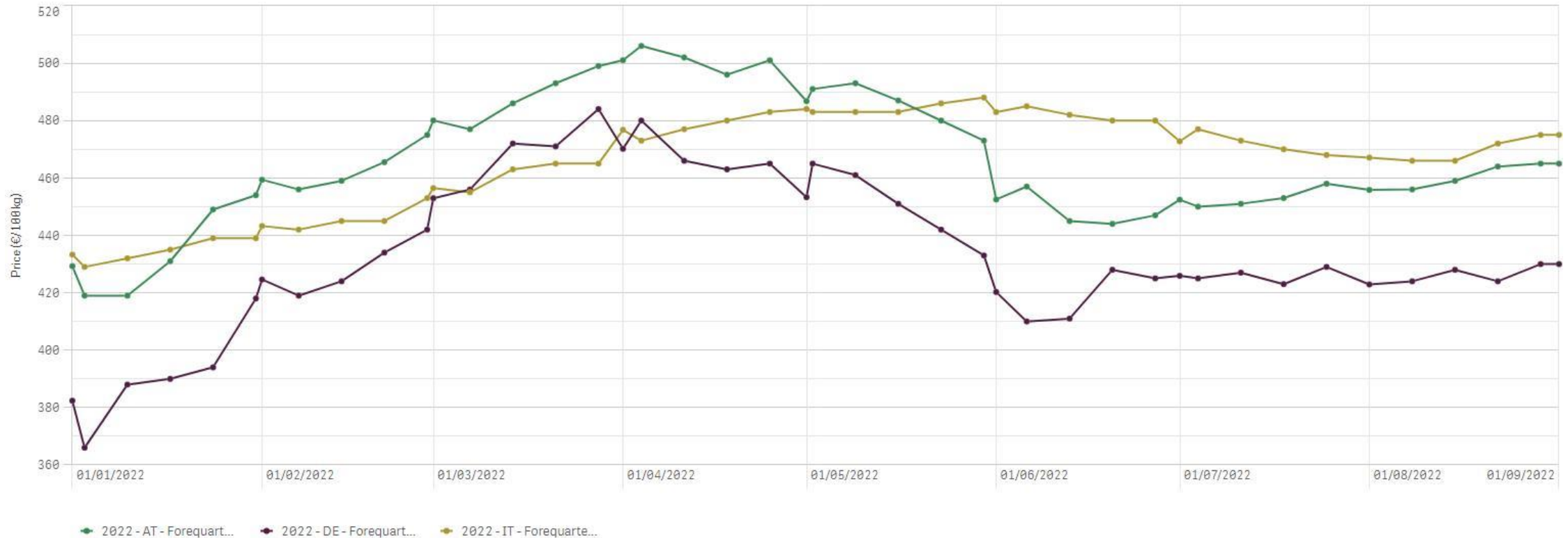
Male Rearing Calves Dairy type

Price in Week 35 **106.03**
Change y/y +5.4%

BEEF FOREQUARTERS P R I C E S

Beef Cuts Price Evolution for Austria, Germany, Italy

Year Selection: 2022 | Category: Forequarter (Selling price)

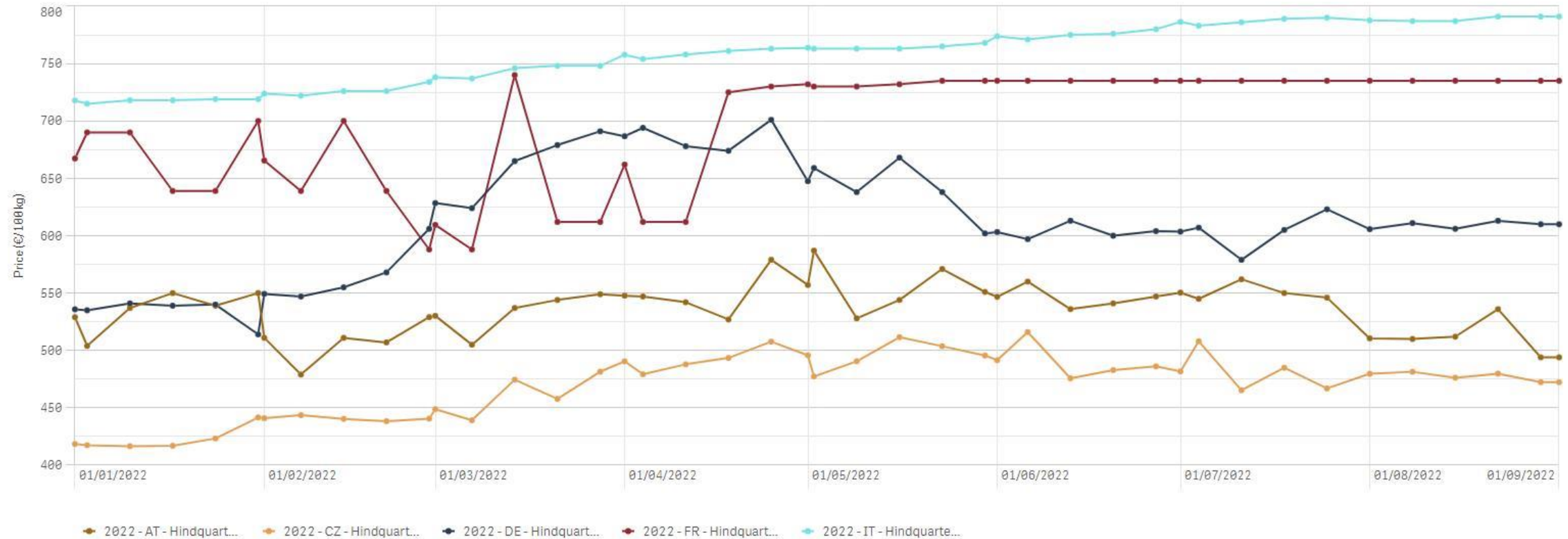


MS notifications – Reg. 2017/1185
Provisional data – subject to changes

BEEF HINDQUARTERS P R I C E S

Beef Cuts Price Evolution for Austria, Czechia, France, Germany, Italy

Year Selection: 2022 | Category: Hindquarter (Selling price)

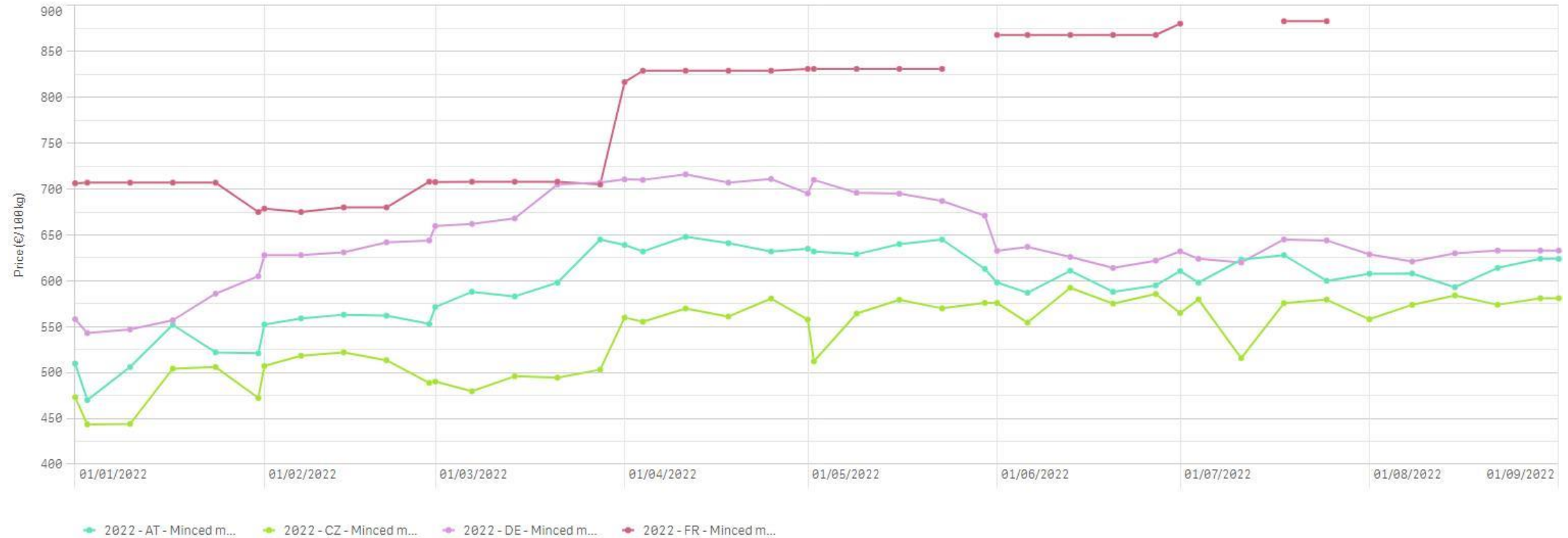


MS notifications – Reg. 2017/1185
Provisional data – subject to changes

BEEF MINCED MEAT SELLING P R I C E S

Beef Cuts Price Evolution for Austria, Czechia, France, Germany

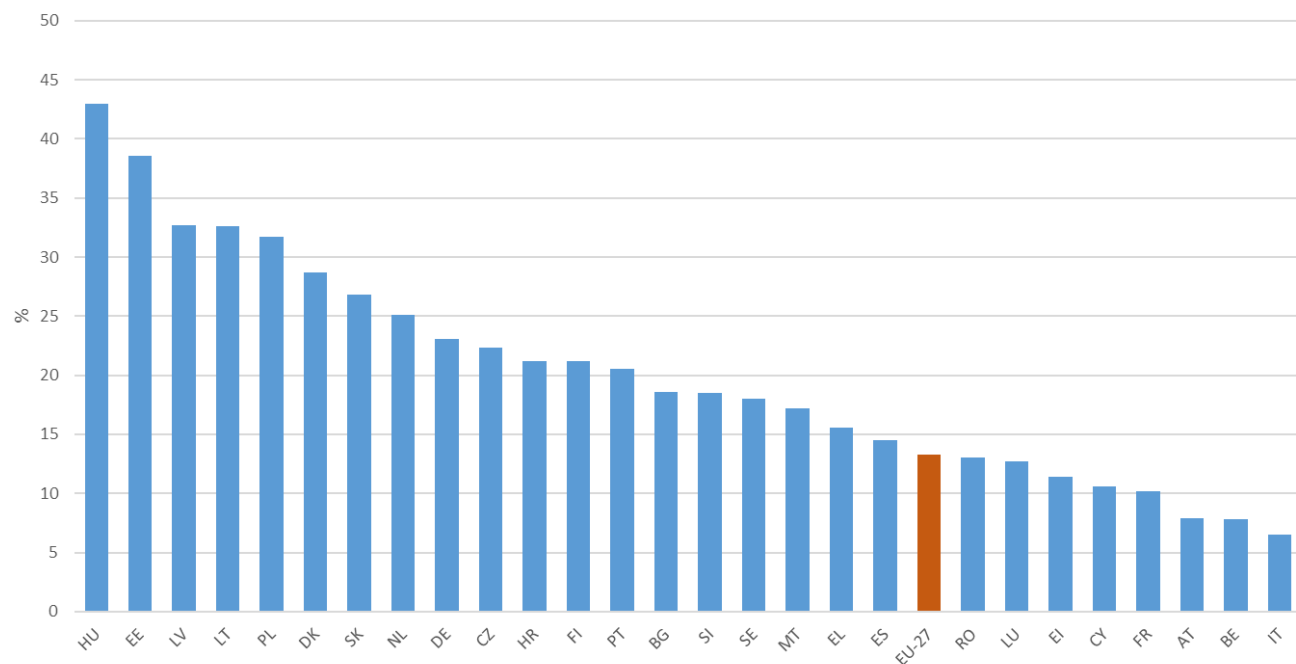
Year Selection: 2022 | Category: Minced meat (Selling price)



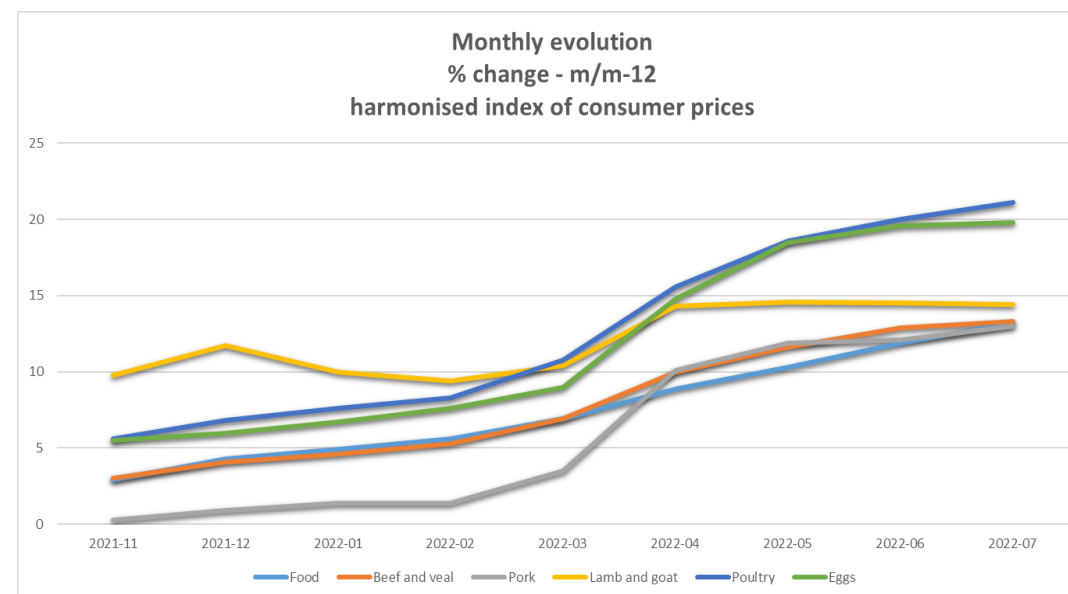
MS notifications – Reg. 2017/1185
Provisional data – subject to changes

HARMONISED INDEX OF CONSUMERS PRICES

Percentage change beef & veal index of consumer prices
July 22/July21



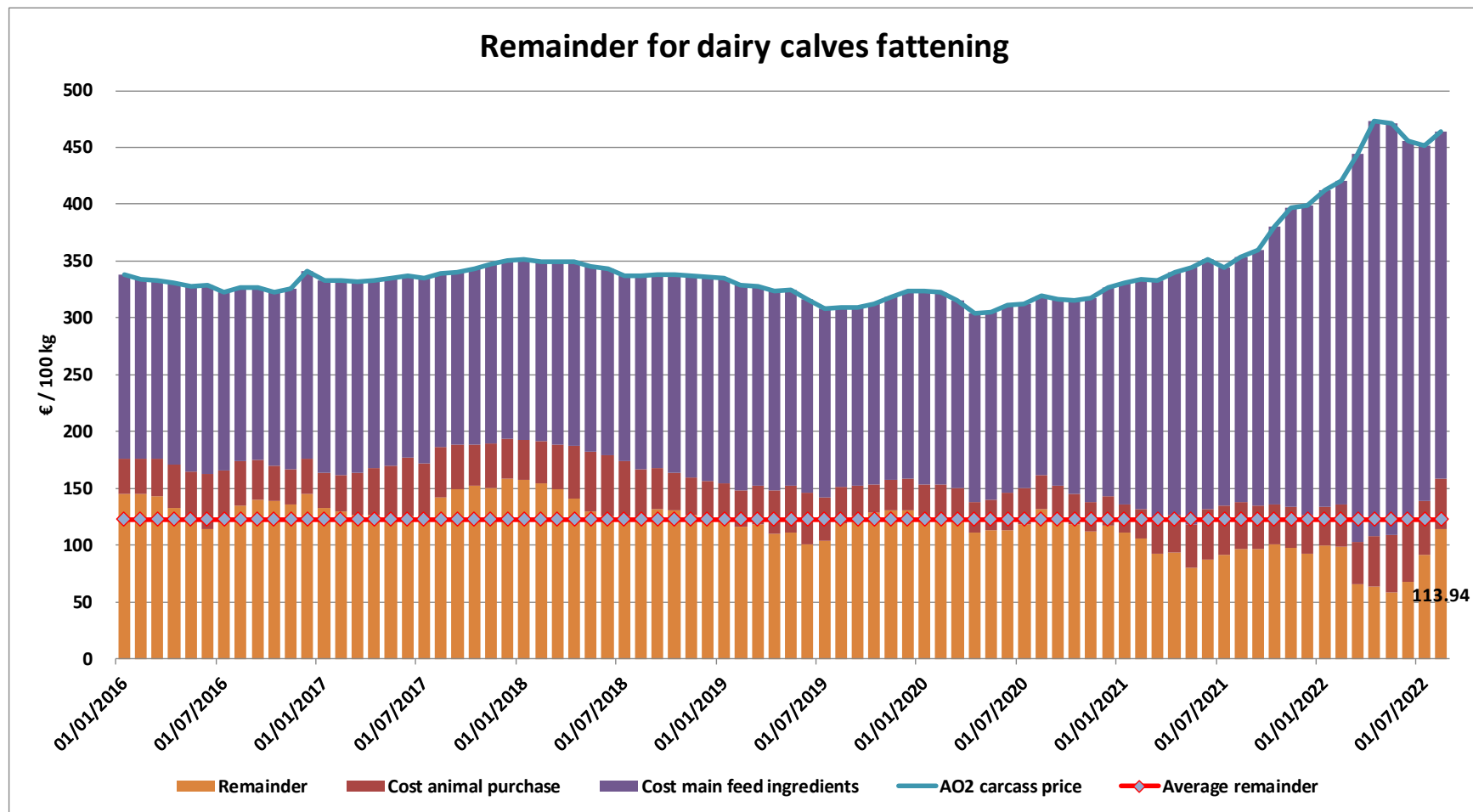
Monthly evolution
% change - m/m-12
harmonised index of consumer prices



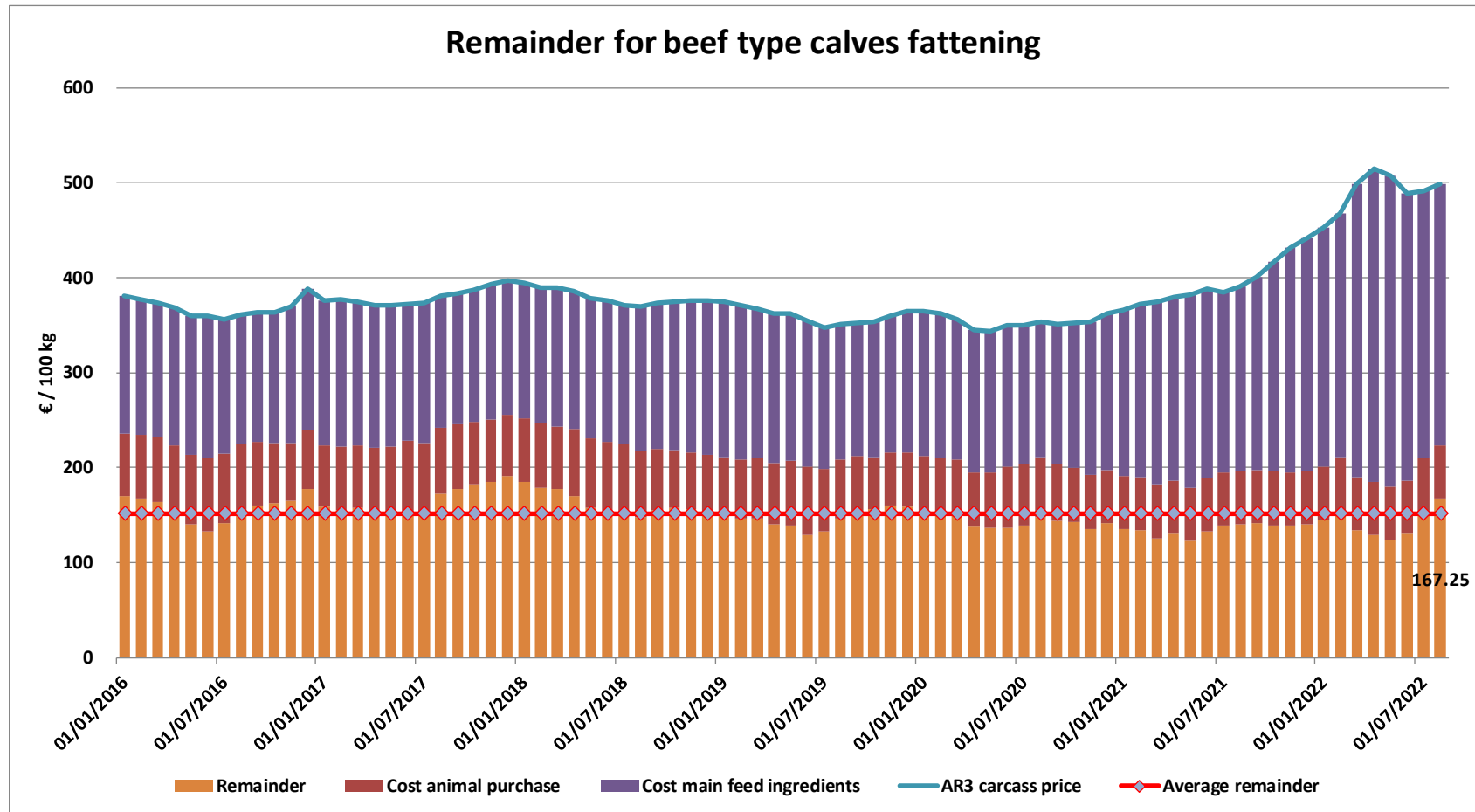
Source - EUROSTAT

16 September
2022

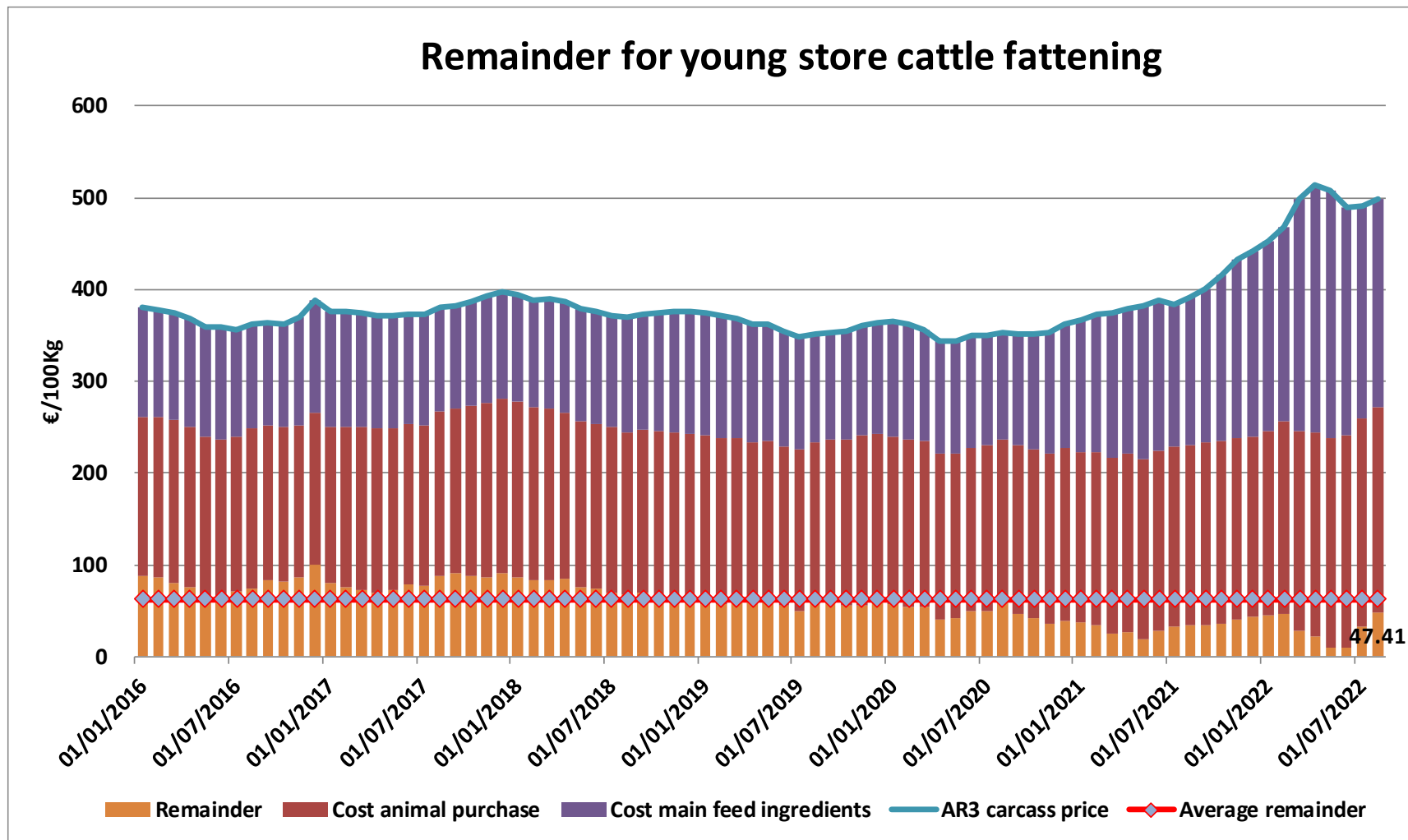
REMAINDERS



REMAINDERS



REMAINDERS



Forecast Summary

	2020	2021	2022	2023
EU PRODUCTION (1000T)	- 1.24% 6 822	- 0.23% 6 807	- 0.76% 6 755	- 0.84% 6 698
CONSUMPTION (1000T)	- 5.38% 6 292	- 0.34% 6 270	- 0.80% 6 220	- 1.74% 6 112
BALANCE	530	537	535	586
EU - CARCASS PRICES	2020	2021	2022	2023
ADULT MALE BOVINES (€/100 kg)	↓	↑	↑	↑
COWS (€/100 kg)	↓	↑	↑	↑

Sources : EStat New Cronos, Member States

16 September 2022

TRADE

EU EXPORTS

Beef & Live Animals

EU Exports of Beef and Live Animals (1): Trade figures (COMEXT – tonnes cwe)

In Tons of Carcase Weight

Destinations	2020		2021		Jan to May 2022		Compared to Jan to May 2021
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	450.456	39,5%	344.274	33,5%	147.815	37,9%	+19,5%
Israel	56.139	4,9%	66.070	6,4%	26.077	6,7%	+2,3%
Ghana	47.344	4,2%	47.640	4,6%	16.521	4,2%	-18,3%
Bosnia-Herz.	34.896	3,1%	40.449	3,9%	13.543	3,5%	-12,6%
Ivory Coast	32.433	2,8%	29.236	2,8%	12.997	3,3%	-1,7%
Philippines	33.650	3,0%	34.666	3,4%	12.244	3,1%	-25,9%
Switzerland	26.223	2,3%	28.718	2,8%	11.714	3,0%	+2,2%
Lebanon	33.709	3,0%	19.527	1,9%	10.418	2,7%	-7,0%
Japan	11.885	1,0%	21.888	2,1%	9.081	2,3%	+46,5%
Canada	20.450	1,8%	20.676	2,0%	8.864	2,3%	+39,4%
Norway	12.873	1,1%	18.233	1,8%	8.765	2,2%	-19,9%
Other Destinations	379.334	33,3%	356.674	34,7%	112.390	28,8%	-25,4%
Extra-EU	1.139.392		1.028.051		390.428		-5,1%
% Change				-9,8%			

In Thousand Euros

Destinations	2020		2021		Jan to May 2022		Compared to Jan to May 2021
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	1.508.377	40,2%	1.491.071	38,6%	718.752	42,3%	+40,4%
Israel	266.074	7,1%	328.555	8,5%	143.981	8,5%	+17,6%
Ghana	43.585	1,2%	48.021	1,2%	18.349	1,1%	-4,3%
Bosnia-Herz.	96.620	2,6%	126.247	3,3%	54.977	3,2%	+21,0%
Ivory Coast	21.626	0,6%	25.684	0,7%	10.586	0,6%	-0,7%
Philippines	61.861	1,6%	73.028	1,9%	30.775	1,8%	-0,7%
Switzerland	142.125	3,8%	171.272	4,4%	84.235	5,0%	+31,4%
Lebanon	131.329	3,5%	80.664	2,1%	53.402	3,1%	+15,4%
Japan	43.177	1,1%	98.109	2,5%	51.909	3,1%	+++
Canada	65.044	1,7%	73.398	1,9%	35.554	2,1%	+72,9%
Norway	46.748	1,2%	69.931	1,8%	43.388	2,6%	+8,6%
Other Destinations	1.329.248	35,4%	1.279.261	33,1%	454.684	26,7%	-11,9%
Extra-EU	3.755.813		3.865.241		1.700.593		+17,2%
% Change				+2,9%			

TRADE

EU EXPORTS

Beef & Live Animals

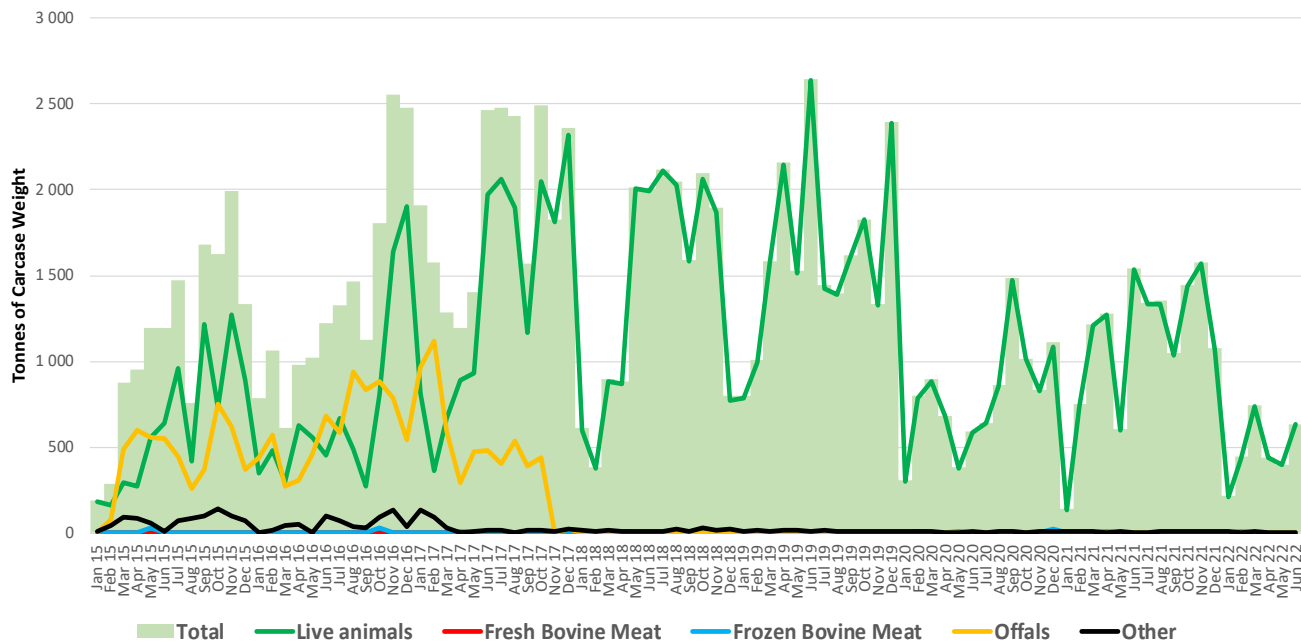
EU Exports of Beef and Live Animals (excluding fats): Trade figures (COMEXT – tonnes cwe)

Destinations	2018		2019		2020		2021		Jan-Jun 22		Compared to
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Israel	47 036	6.8%	48 505	7.1%	56 139	8.1%	66 070	9.7%	30 945	10.6%	- 5.8%
Ghana	36 766	5.3%	39 196	5.7%	47 344	6.9%	47 640	7.0%	19 613	6.7%	- 19.6%
Bosnia-Herz.	37 675	5.4%	40 013	5.8%	34 896	5.1%	40 449	5.9%	17 369	5.9%	- 8.1%
Ivory Coast	36 064	5.2%	33 396	4.9%	32 433	4.7%	29 236	4.3%	15 315	5.2%	- 5.9%
Philippines	27 857	4.0%	31 302	4.6%	33 650	4.9%	34 666	5.1%	15 295	5.2%	- 19.7%
Switzerland	20 123	2.9%	21 398	3.1%	26 223	3.8%	28 718	4.2%	13 437	4.6%	- 8.5%
Lebanon	42 362	6.1%	36 221	5.3%	33 709	4.9%	19 527	2.9%	12 722	4.3%	+ 1.5%
Japan	3 452	0.5%	7 982	1.2%	11 885	1.7%	21 888	3.2%	11 044	3.8%	+ 28.2%
Algeria	35 410	5.1%	57 152	8.3%	39 396	5.7%	24 111	3.5%	10 579	3.6%	- 40.1%
Canada	2 225	0.3%	6 756	1.0%	20 450	3.0%	20 676	3.0%	10 156	3.5%	+ 29.9%
Egypt	6 218	0.9%	3 105	0.5%	7 718	1.1%	10 540	1.5%	9 504	3.2%	+ 137.1%
Norway	7 783	1.1%	7 622	1.1%	12 873	1.9%	18 233	2.7%	9 478	3.2%	- 18.8%
Kosovo	6 164	0.9%	9 896	1.4%	10 391	1.5%	16 488	2.4%	7 075	2.4%	- 6.9%
Ukraine	10 445	1.5%	13 627	2.0%	14 988	2.2%	15 076	2.2%	6 344	2.2%	- 11.8%
Libya	27 878	4.0%	24 541	3.6%	22 352	3.2%	19 784	2.9%	6 128	2.1%	- 45.1%
Hong Kong	11 159	1.6%	46 639	6.8%	56 713	8.2%	44 823	6.6%	5 891	2.0%	- 77.2%
Other Destinations	332 807	48.1%	259 325	37.8%	227 777	33.1%	225 852	33.0%	92 286	31.5%	
Total (without UK)	691 423		686 677		688 936		683 777		293 180		
% change			- 1%		+ 0%		- 1%		- 16.1%		

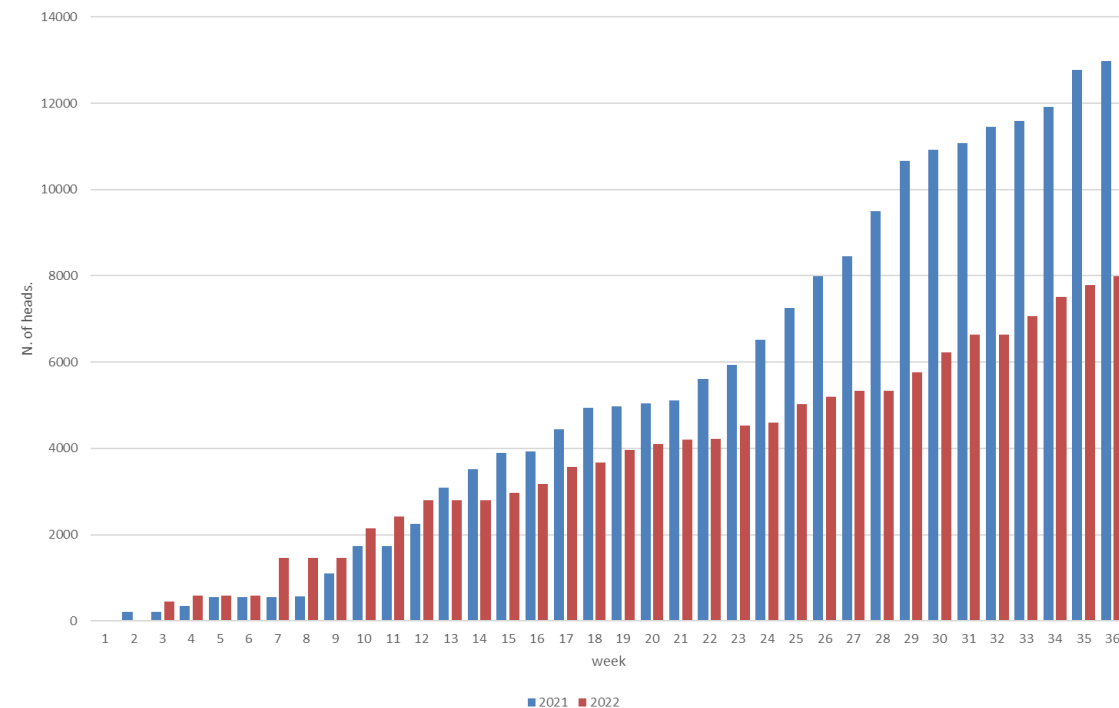
TRADE

EU EXPORTS Beef to RUSSIA

EU Beef Exports to Russia
Source : Comext in Tonnes of cwe



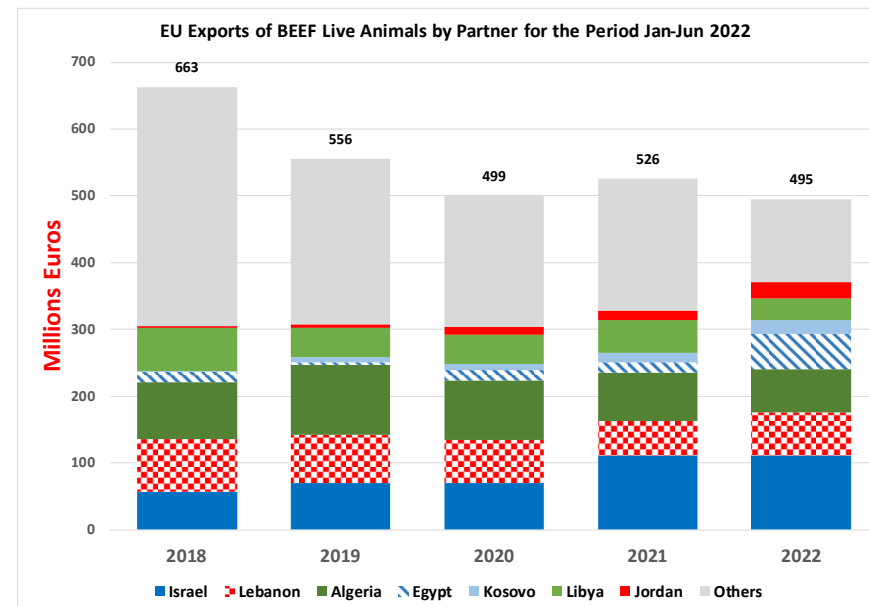
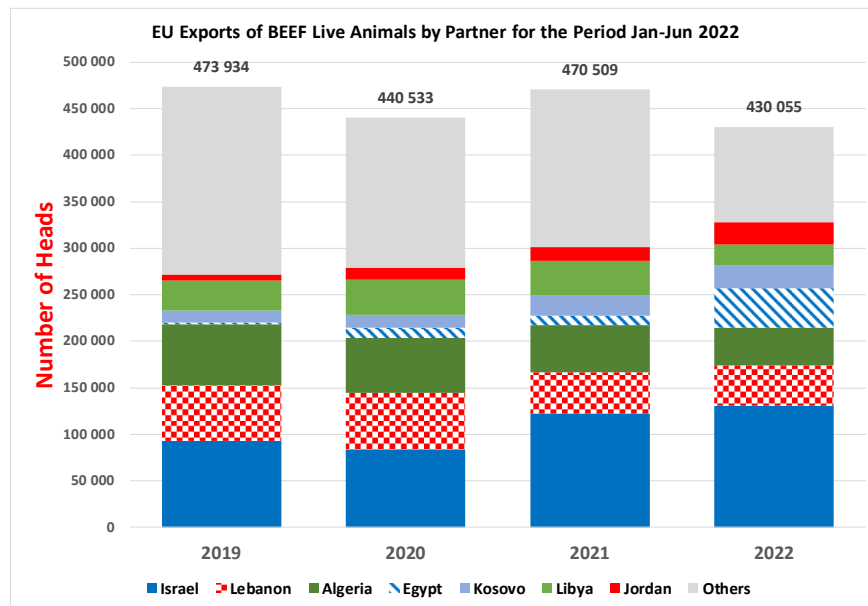
Cumulative export to Russia in 2021 and 2022



Taxud - surveillance data

TRADE

EU EXPORTS Live Animals



TRADE

EU IMPORTS

Beef & Live Animals

EU Imports of Beef and Live Animals (1): Trade figures (COMEXT – tonnes cwe)

In Tons of Carcase Weight

Destinations	2020		2021		Jan to May 2022		Compared to Jan to May 2021
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	120.703	35,1%	87.479	28,3%	56.557	36,5%	+87,6%
Brazil	84.139	24,4%	81.573	26,4%	36.530	23,6%	+13,7%
Argentina	56.421	16,4%	52.286	16,9%	23.564	15,2%	+35,7%
Uruguay	34.611	10,1%	42.669	13,8%	17.424	11,2%	-4,6%
USA	16.532	4,8%	14.826	4,8%	6.798	4,4%	+35,7%
Australia	11.058	3,2%	8.925	2,9%	3.696	2,4%	-19,2%
New Zealand	6.116	1,8%	4.378	1,4%	2.088	1,3%	+41,7%
Paraguay	4.234	1,2%	3.933	1,3%	1.775	1,1%	+++
Switzerland	4.187	1,2%	4.714	1,5%	1.651	1,1%	-13,8%
Japan	789	0,2%	1.478	0,5%	1.506	1,0%	+++
Namibia	1.445	0,4%	1.996	0,6%	1.347	0,9%	+++
Other Destinations	4.130	1,2%	4.625	1,5%	2.104	1,4%	+20,4%
Extra-EU	344.362		308.882		155.041		+35,8%
% Change				-10,3%			

In Thousand Euros

Destinations	2020		2021		Jan to May 2022		Compared to Jan to May 2021
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	483.128	26,5%	358.399	20,1%	230.869	23,8%	+95,2%
Brazil	377.626	20,7%	386.666	21,7%	202.627	20,9%	+44,2%
Argentina	358.357	19,7%	376.451	21,1%	204.504	21,0%	+++
Uruguay	210.062	11,5%	247.057	13,9%	133.320	13,7%	+40,3%
USA	154.464	8,5%	155.927	8,7%	78.736	8,1%	+70,0%
Australia	91.489	5,0%	90.483	5,1%	41.764	4,3%	-1,7%
New Zealand	41.142	2,3%	31.627	1,8%	17.125	1,8%	+87,1%
Paraguay	20.834	1,1%	20.484	1,1%	10.932	1,1%	+++
Switzerland	44.984	2,5%	53.395	3,0%	20.160	2,1%	-8,9%
Japan	10.314	0,6%	25.588	1,4%	12.987	1,3%	+++
Namibia	5.725	0,3%	6.902	0,4%	5.521	0,6%	+++
Other Destinations	24.052	1,3%	30.273	1,7%	13.173	1,4%	+26,4%
Extra-EU	1.822.178		1.783.253		971.719		+63,2%
% Change				-2,1%			

TRADE

EU IMPORTS Beef & Live Animals

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

Origins	2018		2019		2020		2021		Jan-Jun 22		Compared to
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	103 979	37.3%	99 569	36.4%	84 139	37.6%	81 573	36.8%	45 084	37.8%	+ 13.8%
Argentina	61 400	22.0%	65 324	23.9%	56 421	25.2%	52 286	23.6%	28 245	23.7%	+ 20.1%
Uruguay	47 922	17.2%	40 483	14.8%	34 611	15.5%	42 669	19.3%	20 591	17.2%	- 10.5%
USA	19 268	6.9%	16 852	6.2%	16 532	7.4%	14 826	6.7%	8 532	7.1%	+ 32.2%
Australia	17 354	6.2%	16 432	6.0%	11 058	4.9%	8 925	4.0%	3 930	3.3%	- 17.0%
Paraguay	5 520	2.0%	5 203	1.9%	4 234	1.9%	3 933	1.8%	2 528	2.1%	+ 54.3%
New Zealand	7 109	2.6%	6 712	2.5%	6 116	2.7%	4 378	2.0%	2 490	2.1%	+ 23.7%
Switzerland	5 413	1.9%	4 393	1.6%	4 187	1.9%	4 714	2.1%	1 885	1.6%	- 14.4%
Namibia	3 442	1.2%	7 706	2.8%	1 445	0.6%	1 996	0.9%	1 665	1.4%	+++
Japan	791	0.3%	997	0.4%	789	0.4%	1 478	0.7%	1 595	1.3%	+++
Canada	1 343	0.5%	2 518	0.9%	1 550	0.7%	1 816	0.8%	901	0.8%	+ 2.0%
Serbia	1 134	0.4%	1 062	0.4%	931	0.4%	985	0.4%	544	0.5%	+ 37.4%
Botswana	3 119	1.1%	4 950	1.8%	788	0.4%	331	0.1%	433	0.4%	+++
Norway	153	0.1%	125	0.0%	335	0.1%	546	0.2%	330	0.3%	+ 79.2%
Chile	356	0.1%	392	0.1%	168	0.1%	238	0.1%	190	0.2%	+++
China	30	0.0%	26	0.0%	0	0.0%	22	0.0%	166	0.1%	+++
Other Destinations	415	0.1%	457	0.2%	357	0.2%	705	0.3%	281	0.2%	
Total (without UK)	278 748		273 202		223 660		221 420		119 390		
% change			- 2%		- 18%		- 1%		+ 12.3%		

TRADE

EU IMPORTS

Beef

EU Imports of Beef Fats

Trade Figures (COMEXT – tonnes cwe)

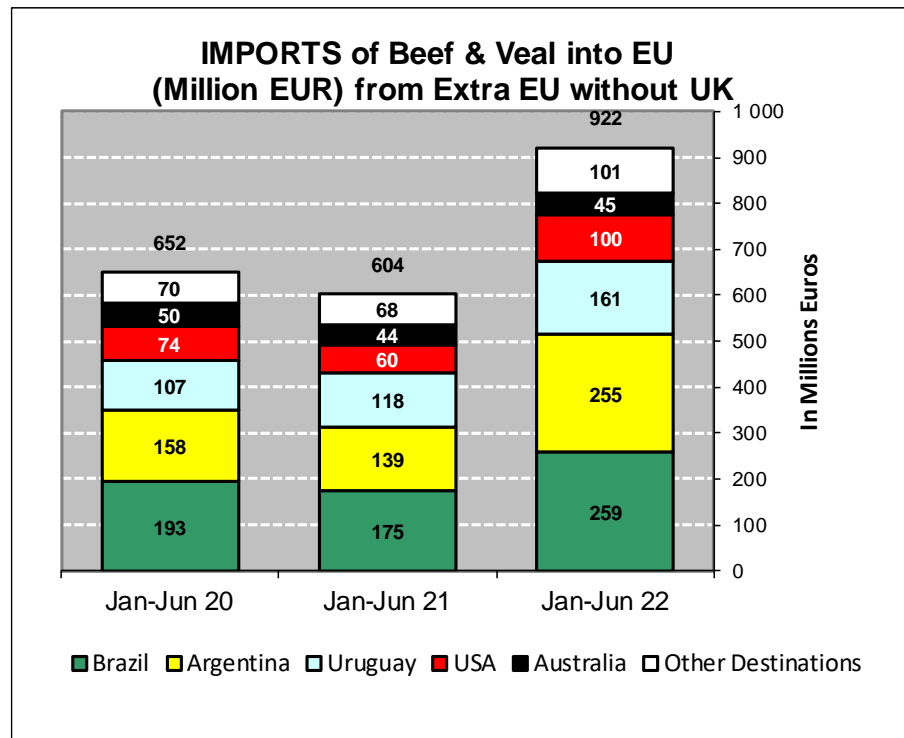
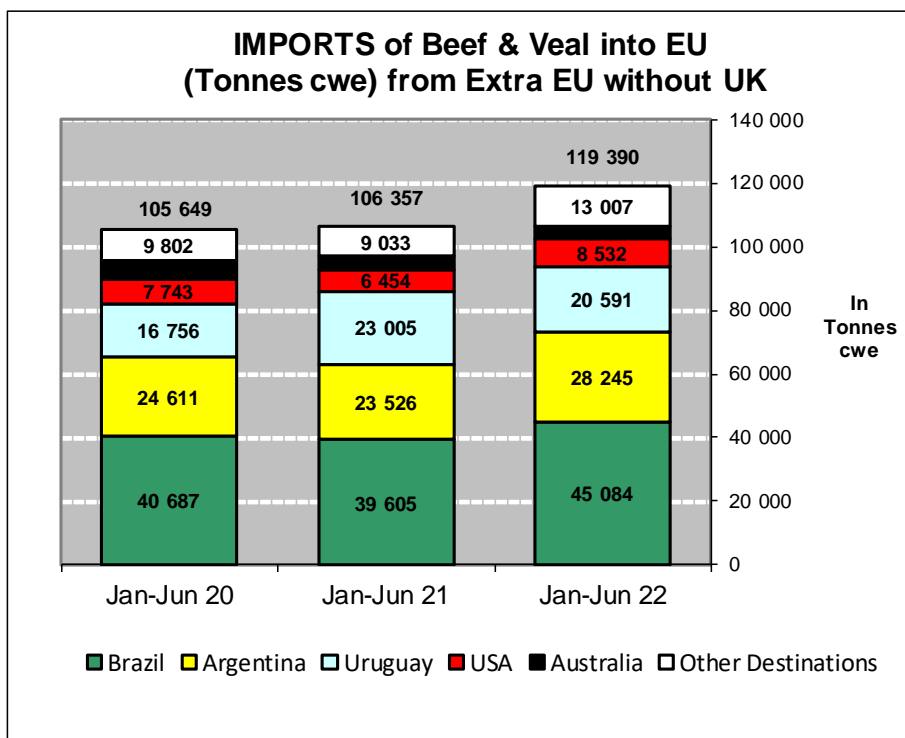
Origins	2020		2021		Jan to May 2022		Compared to Jan to May 2021
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
Argentina	477	4.3%	23 293	31.7%	14 464	53.7%	+20.8%
Uruguay	1	0.0%	37 469	51.0%	7 512	27.9%	-77.5%
United Kingdom	10 223	91.2%	11 568	15.7%	4 481	16.6%	-30.7%
Switzerland	138	1.2%	519	0.7%	247	0.9%	+30.4%
Israel	111	1.0%	469	0.6%	198	0.7%	
Iceland	14	0.1%	27	0.0%	15	0.1%	+94.9%
New Zealand	30	0.3%	14	0.0%	14	0.1%	
Japan	0	0.0%	1	0.0%	1	0.0%	
Singapore	0	0.0%	-	0.0%	0	0.0%	
Brazil	-	0.0%	0	0.0%	0	0.0%	+++
Canada	-	0.0%	-	0.0%	0	0.0%	
Other Destinations	212	1.9%	170	0.2%	0	0.0%	-100.0%
Extra-EU	11 206		73 529		26 933		-48.4%
% Change				+556.2%			

TRADE

EU Imports of Beef and Live Animals (Excl Fats):
Trade Figures (COMEXT)

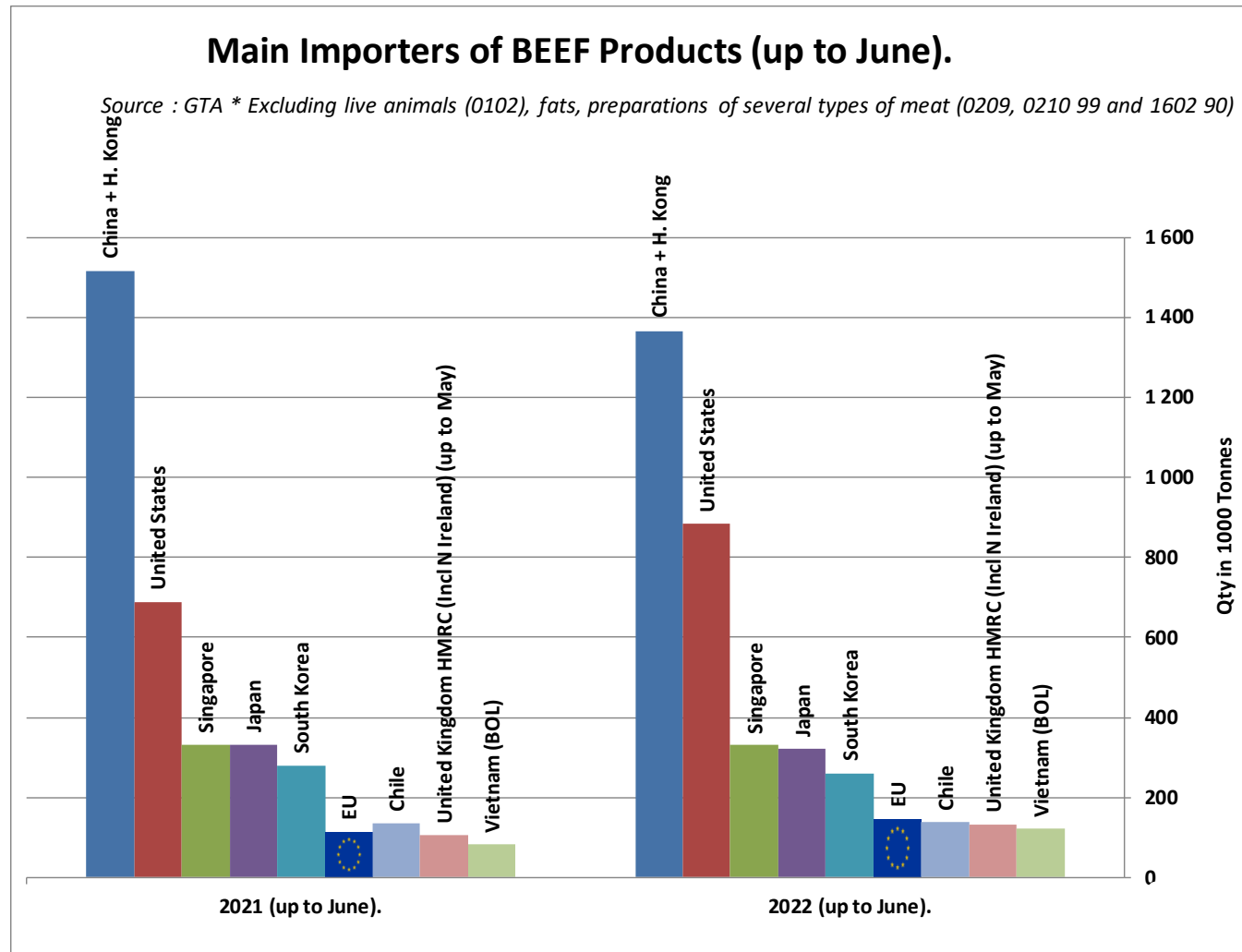
EU IMPORTS

Beef & Live Animals (Excl Fats)



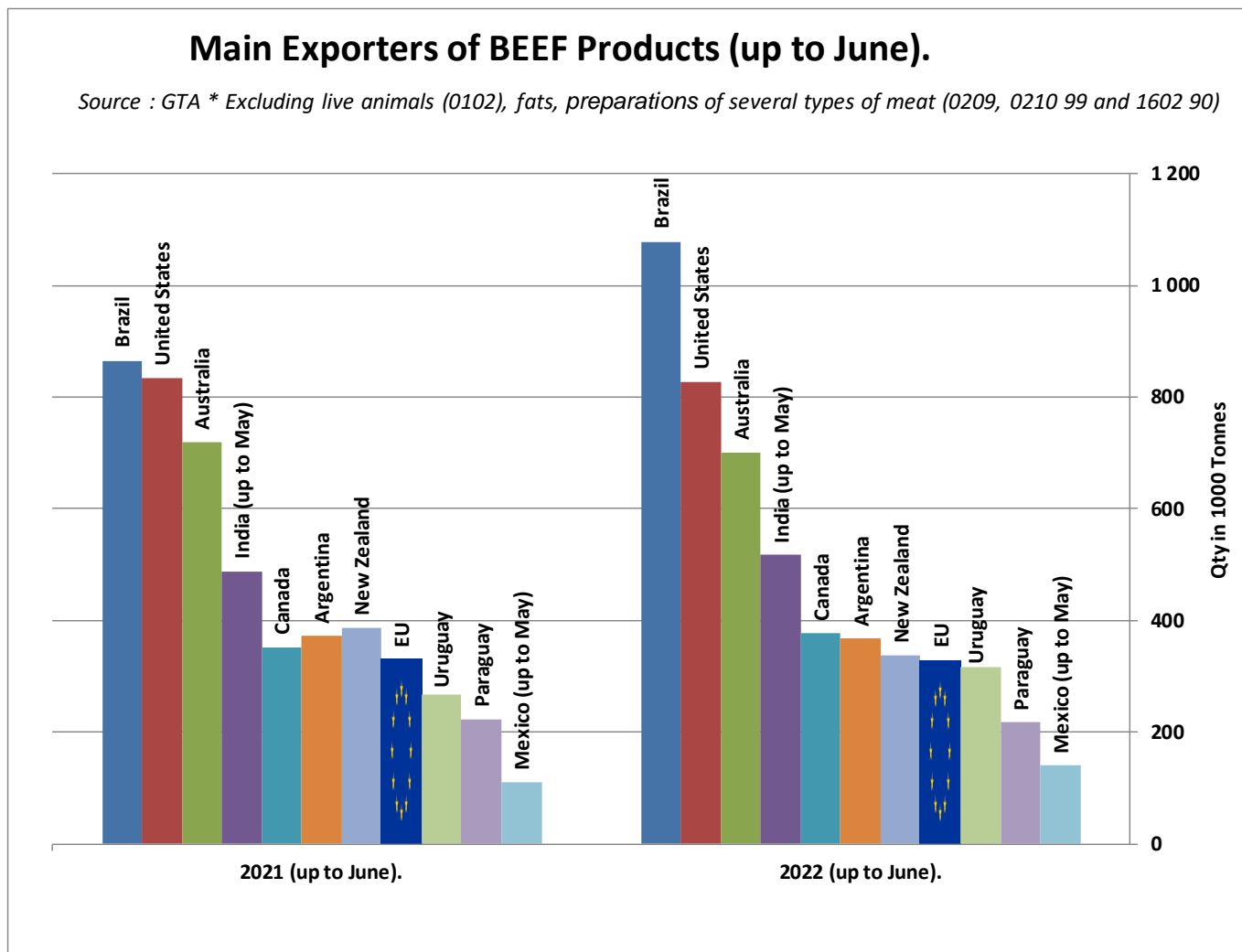
WORLD BEEF MARKET

E.U. + UK IMPORTS BEEF MAIN IMPORTERS



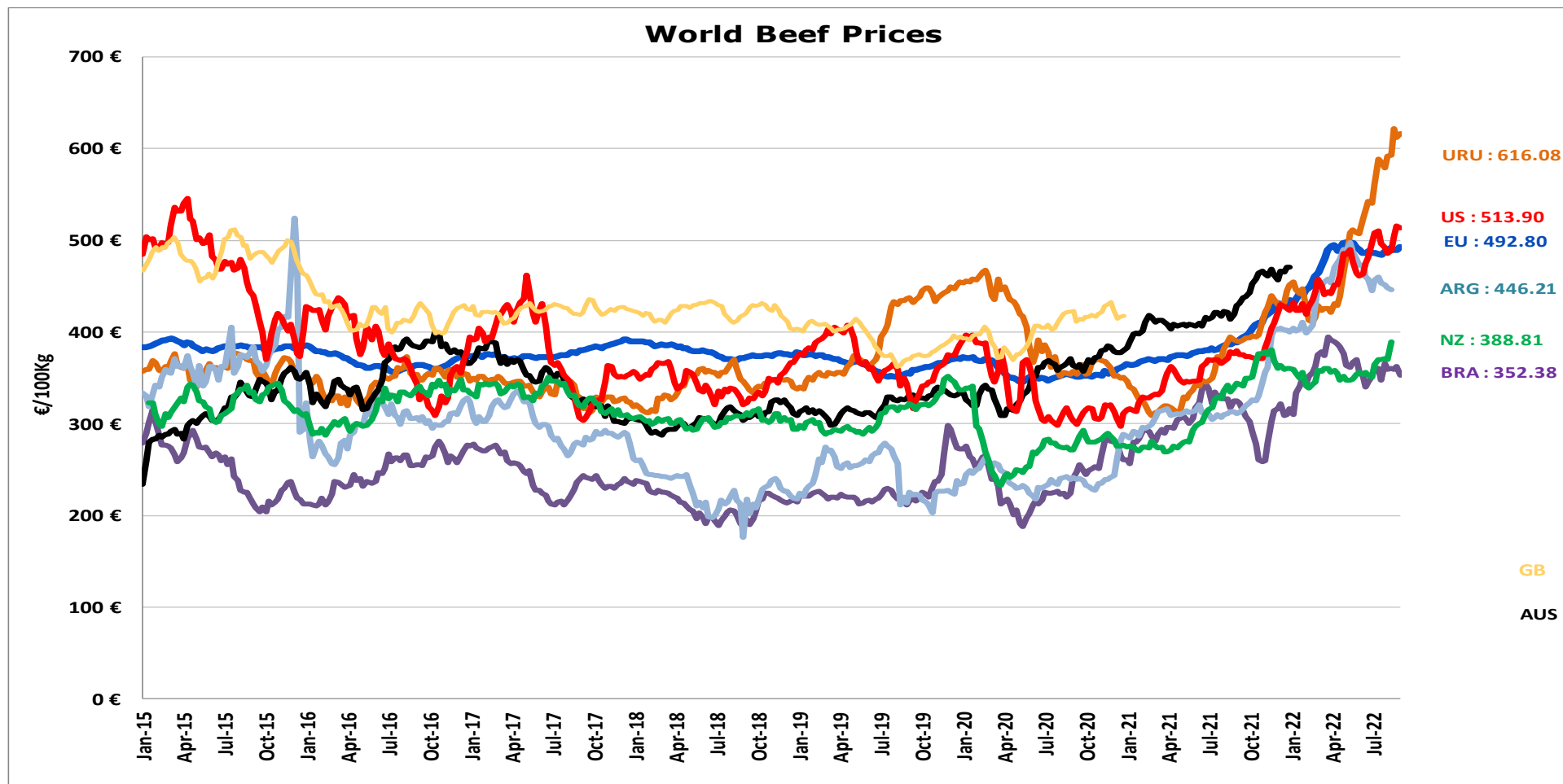
WORLD BEEF MARKET

E.U. + UK EXPORTS BEEF MAIN EXPORTERS



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/ls-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

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/>

Thank you



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