

# BEEF & VEAL MARKET SITUATION



Beef Forecast Group 09 March 2020

# LIVESTOCK

## DECEMBER SURVEY

# EU EVOLUTION TOTAL BOVINE

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2019 2018	BOVINE < 1 Year				%Var 2019 2018	BOVINE 1-2 Year				%Var 2019 2018	BOVINE > 2 Year				%Var 2019 2018
	2016	2017	2018	2019		2016	2017	2018	2019		2016	2017	2018	2019		2016	2017	2018	2019	
BE	2 501	2 386	2 398	2 373	-1.0%	748	700	724	722	-0.3%	492	484	464	464	-0.2%	1 261	1 202	1 210	1 188	-1.8%
BG	570	553	542	525	-3.1%	120	110	108	98	-9.0%	63	57	59	58	-0.8%	387	386	375	369	-1.8%
CZ	1 340	1 366	1 365	1 367	+0.1%	397	407	404	411	+1.8%	295	299	304	299	-1.8%	648	660	657	657	-0.0%
DK	1 554	1 558	1 530	1 500	-2.0%	540	541	534	522	-2.2%	298	294	284	280	-1.4%	715	723	712	698	-2.0%
DE	12 467	12 281	11 949	11 640	-2.6%	3 795	3 704	3 584	3 485	-2.7%	2 960	2 904	2 829	2 751	-2.7%	5 712	5 673	5 536	5 403	-2.4%
EE	248	251	252	254	+0.8%	68	70	71	71	+0.4%	50	49	49	50	+1.2%	130	132	132	133	+0.8%
IE	6 613	6 674	6 593	6 560	-0.5%	2 077	2 087	2 000	1 962	-1.9%	1 778	1 792	1 790	1 741	-2.7%	2 759	2 795	2 804	2 856	+1.9%
EL	554	556	542	538	-0.7%	145	151	141	142	+0.7%	102	101	96	96	idem	306	303	305	300	-1.6%
ES	6 318	6 466	6 511	6 600	+1.4%	2 404	2 492	2 494	2 529	+1.4%	804	822	847	857	+1.2%	3 110	3 151	3 170	3 214	+1.4%
FR	19 373	18 954	18 613	18 151	-2.5%	5 575	5 271	5 304	5 086	-4.1%	3 475	3 381	3 180	3 182	+0.0%	10 324	10 301	10 129	9 883	-2.4%
HR	444	451	414	420	+1.4%	154	156	153	151	-1.3%	89	100	96	107	+11.5%	201	195	165	162	-1.8%
IT	6 315	6 350	6 311	6 377	+1.0%	1 745	1 738	1 703	1 759	+3.3%	1 448	1 501	1 538	1 588	+3.3%	3 122	3 111	3 071	3 030	-1.3%
CY	63	67	71	74	+4.4%	22	23	24	25	+3.1%	10	11	12	12	-5.2%	32	33	35	38	+8.7%
LV	412	406	395	395	-0.0%	113	108	106	108	+2.2%	73	70	65	65	-0.4%	227	228	225	222	-0.9%
LT	695	677	654	635	-2.9%	179	180	173	167	-3.6%	143	135	133	132	-1.0%	373	362	348	336	-3.3%
LU	202	198	194	192	-1.2%	54	50	50	50	-0.9%	44	44	42	41	-1.0%	104	103	103	101	-1.4%
HU	852	870	885	909	+2.7%	239	243	251	258	+2.8%	176	179	182	193	+6.0%	438	448	451	458	+1.6%
MT	14	14	14	14	-0.8%	4	4	4	4	-5.9%	3	3	3	3	+7.2%	7	7	7	7	-1.3%
NL	4 294	4 030	3 690	3 721	+0.8%	1 666	1 594	1 510	1 528	+1.2%	644	575	465	440	-5.4%	1 985	1 860	1 715	1 752	+2.2%
AT	1 954	1 943	1 913	1 880	-1.7%	632	624	618	605	-2.1%	432	439	428	426	-0.5%	890	881	866	848	-2.1%
PL	5 970	6 036	6 183	6 262	+1.3%	1 718	1 713	1 709	1 748	+2.2%	1 637	1 669	1 732	1 757	+1.4%	2 615	2 654	2 742	2 758	+0.6%
PT	1 635	1 670	1 632	1 675	+2.6%	499	515	497	531	+6.9%	267	256	236	240	+1.9%	869	900	899	903	+0.4%
RO	2 050	2 011	1 977	1 932	-2.3%	447	432	418	408	-2.3%	251	248	241	236	-2.2%	1 352	1 330	1 318	1 288	-2.3%
SI	489	480	477	483	+1.3%	155	153	153	151	-1.5%	131	128	128	136	+6.1%	203	198	196	197	+0.3%
SK	446	440	439	435	-1.0%	130	125	123	123	-0.3%	84	84	83	84	+1.0%	231	231	232	228	-2.1%
FI	887	875	859	841	-2.2%	302	299	296	287	-2.9%	218	213	210	205	-2.4%	367	363	354	349	-1.4%
SE	1 436	1 449	1 435	1 405	-2.1%	468	474	468	453	-3.1%	344	342	343	339	-1.2%	624	633	625	613	-2.0%
EU	79 698	79 010	77 840	77 156	-0.9%	24 396	23 964	23 619	23 385	-1.0%	16 310	16 182	15 838	15 780	-0.4%	38 992	38 863	38 382	37 990	-1.0%
UK	9 806	9 787	9 610	9 438	-1.8%	2 952	2 956	2 869	2 830	-1.4%	2 435	2 413	2 405	2 344	-2.5%	4 419	4 417	4 336	4 265	-1.6%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2018 AND 2019

09 March 2020

# LIVESTOCK

## DECEMBER SURVEY

# EU EVOLUTION

## COWS

Dec 1000 Hd	TOTAL COWS					%Var 2019 2018	DAIRY COWS					%Var 2019 2018	OTHER COWS					%Var 2019 2018
	2016	2017	2018	2019			2016	2017	2018	2019			2016	2017	2018	2019		
BE	988	938	942	939	-0.3%		531	519	529	538	+1.6%		457	419	412	401	-2.7%	
BG	365	357	351	343	-2.4%		279	261	244	227	-7.3%		86	97	107	116	+8.7%	
CZ	561	571	570	570	-0.0%		367	365	359	361	+0.8%		193	206	212	209	-1.5%	
DK	657	664	655	645	-1.5%		565	575	570	563	-1.2%		92	89	85	83	-2.4%	
DE	4 887	4 859	4 751	4 651	-2.1%		4 218	4 199	4 101	4 012	-2.2%		670	660	650	640	-1.6%	
EE	114	115	116	116	+0.7%		86	86	85	85	-0.2%		28	29	30	31	+3.3%	
IE	2 337	2 362	2 351	2 383	+1.3%		1 295	1 343	1 369	1 426	+4.1%		1 042	1 018	982	957	-2.6%	
EL	241	262	269	262	-2.6%		106	97	95	95	idem		135	165	174	167	-4.0%	
ES	2 785	2 822	2 819	2 880	+2.2%		834	823	817	812	-0.5%		1 950	1 998	2 002	2 068	+3.3%	
FR	7 880	7 751	7 650	7 492	-2.1%		3 637	3 597	3 554	3 486	-1.9%		4 243	4 154	4 095	4 007	-2.2%	
HR	167	161	146	142	-2.7%		147	139	136	130	-4.4%		20	22	10	12	+20.0%	
IT	2 365	2 338	2 263	2 237	-1.1%		2 060	2 040	1 939	1 876	-3.3%		305	298	324	362	+11.7%	
CY	29	30	32	35	+10.0%		28	30	32	35	+9.8%		0	0	0	0	+100.0%	
LV	199	199	196	195	-0.7%		154	150	144	138	-4.2%		45	49	52	56	+9.2%	
LT	333	323	312	299	-4.2%		286	273	256	241	-6.0%		47	50	56	58	+3.8%	
LU	80	78	78	79	+0.8%		52	52	53	54	+2.2%		28	26	25	25	-2.0%	
HU	383	395	403	412	+2.2%		244	244	239	243	+1.7%		138	151	164	169	+3.0%	
MT	7	6	6	6	-1.3%		7	6	6	6	-1.8%		0	0	0	0	+7.1%	
NL	1 864	1 723	1 594	1 633	+2.4%		1 794	1 665	1 552	1 590	+2.4%		70	58	42	43	+2.4%	
AT	757	750	733	720	-1.9%		540	543	533	524	-1.7%		217	207	200	195	-2.5%	
PL	2 304	2 341	2 417	2 406	-0.5%		2 130	2 153	2 214	2 167	-2.1%		174	188	203	239	+17.8%	
PT	724	728	723	731	+1.2%		239	239	235	234	-0.5%		485	490	487	497	+2.0%	
RO	1 204	1 187	1 173	1 146	-2.3%		1 193	1 175	1 158	1 131	-2.3%		12	12	15	15	-1.3%	
SI	171	169	166	166	-0.2%		108	109	103	101	-1.8%		64	60	64	65	+2.4%	
SK	194	195	195	192	-1.2%		133	130	128	126	-1.1%		62	65	67	66	-1.4%	
FI	333	329	322	318	-1.1%		275	271	264	259	-1.8%		57	58	58	59	+1.7%	
SE	514	522	514	500	-2.7%		326	323	313	301	-3.7%		188	199	201	198	-1.2%	
EU	32 441	32 176	31 749	31 500	-0.8%		21 634	21 409	21 029	20 762	-1.3%		10 806	10 767	10 719	10 739	+0.2%	
UK	3 451	3 443	3 382	3 337	-1.3%		1 898	1 904	1 879	1 866	-0.7%		1 554	1 540	1 503	1 471	-2.1%	

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2018 AND 2019

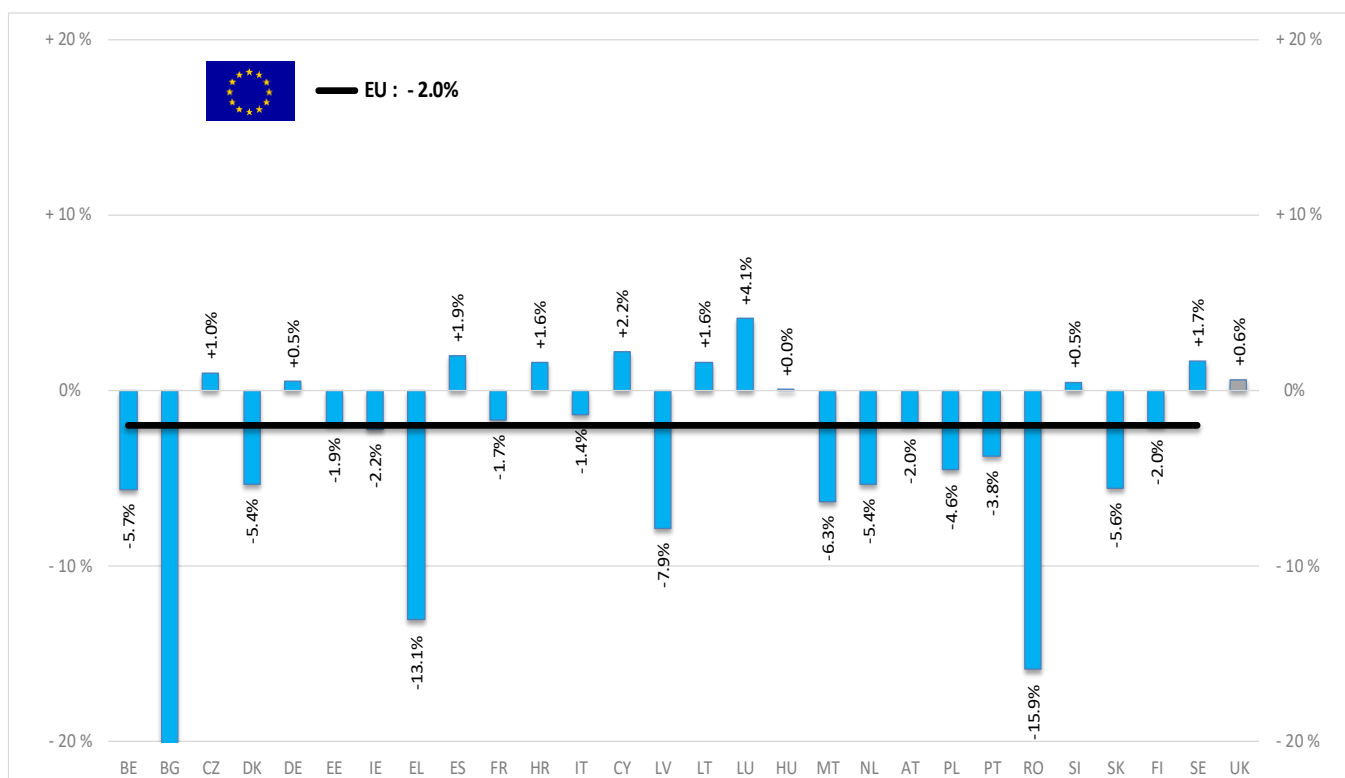
09 March 2020

# PRODUCTION

# % EVOLUTION HEADS

HEADS	Jan-Dec 19/18	
	EU	EU + UK
Bull	+0.0%	-0.1%
Bullock	-5.3%	-2.6%
Cow	-5.8%	-5.4%
Heifer	+2.4%	+2.5%
Calve	-0.0%	+0.2%
Young cattle	-6.2%	-6.1%
Meat of bovine animals	-2.0%	-1.7%

Estimates for last month of period :



Source : EStat - Newcronos

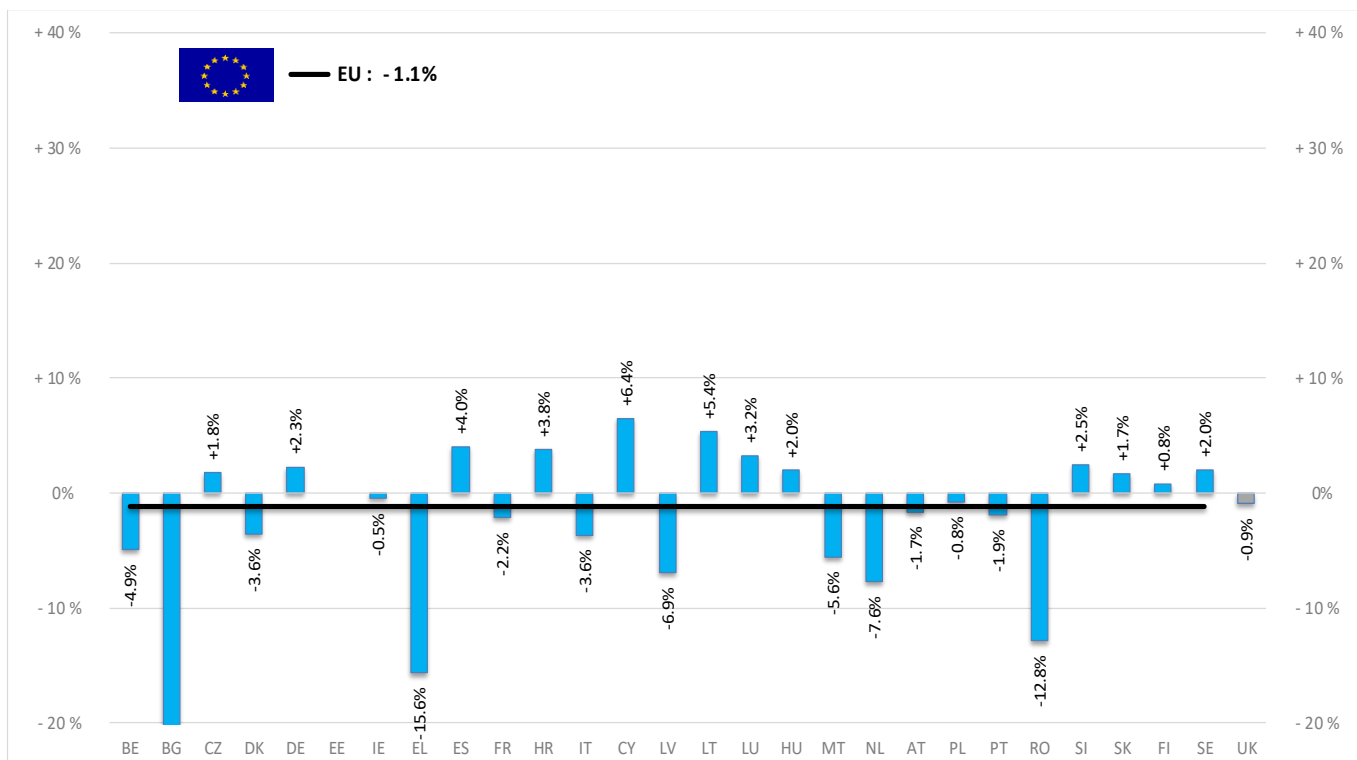
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# PRODUCTION

# % EVOLUTION TONNES

TONNES	Jan-Dec 19/18	
	EU	EU + UK
Bull	+0.4%	+0.3%
Bullock	-4.5%	-3.0%
Cow	-4.3%	-4.1%
Heifer	+3.6%	+3.1%
Calve	+0.1%	-0.0%
Young cattle	-5.9%	-5.7%
Meat of bovine animals	-1.1%	-1.1%

Estimates for last month of period :



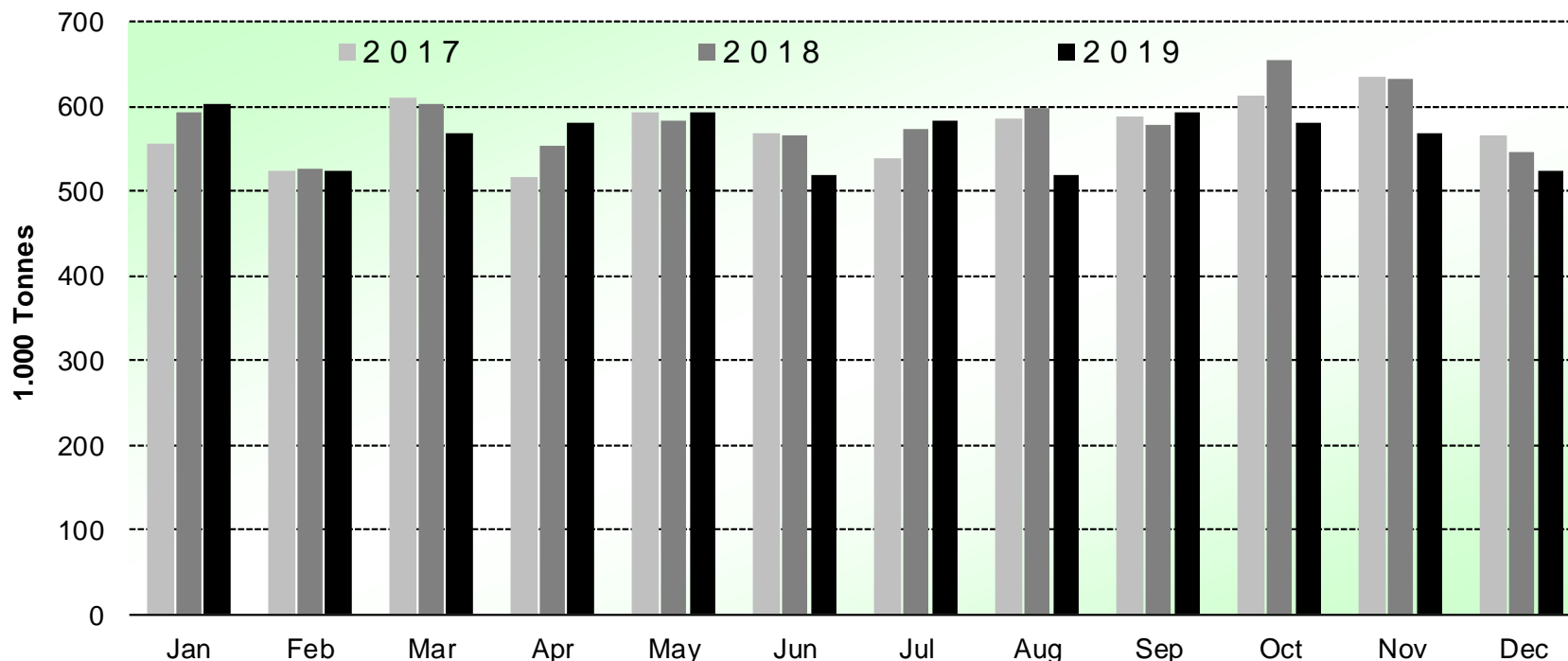
Source : EStat - Newcronos

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# PRODUCTION

HISTORIC  
TONNES

## Beef & Veal Production (EU Slaughtering) - Tonnes



Source : EStat-Newcronos

09 March 2020

# PRICES CARCASSES

## Dashboard

EU Prices week		9	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	369.5	- 0.3%	+ 0.1%	- 1.4%
	Young Bovines (Z)	377.7	- 0.1%	- 1.1%	- 0.1%
	Young Bulls (A)	366.5	- 0.5%	- 2.5%	- 1.6%
	Steers (C)	370.3	+ 0.5%	- 5.1%	- 4.9%
	Cows (D)	282.1	+ 0.3%	+ 1.1%	+ 0.4%
	Heifers (E)	371.2	+ 0.0%	- 3.0%	- 1.5%
Live Animals	Male Calves Dairy Type	31.96	- 0.9%	- 18.1%	- 9.5%
	Male Calves Beef Type	152.6	- 0.4%	- 12.9%	- 2.5%
	Young Store Cattle	2.43	+ 0.3%	- 0.7%	- 0.1%
	Yearling Male Store Cattle	2.35	+ 0.1%	- 1.0%	- 0.6%
	Yearling Female Store Cattle	2.30	+ 0.6%	- 1.5%	- 3.4%
	Calves slaughtered <8M	0.00	- 0.5%	- 3.4%	+ 5.7%

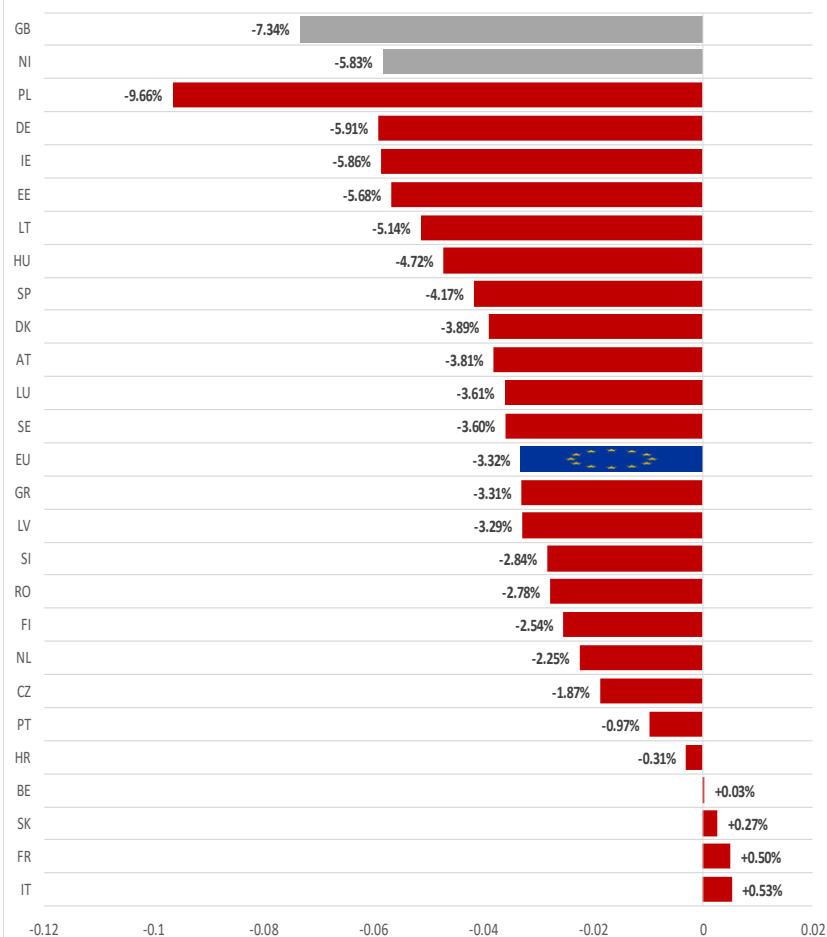
Sources : MSs notifications (Regulation (EU) 1182/2017 and 1184/2017)

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# PRICES CARCASSES

# EU EVOLUTION A/C/Z.R3

EU ACZ R3 Price Comparison between average monthly price March 2019 - February 2020 compared to March 2018 - February 2019

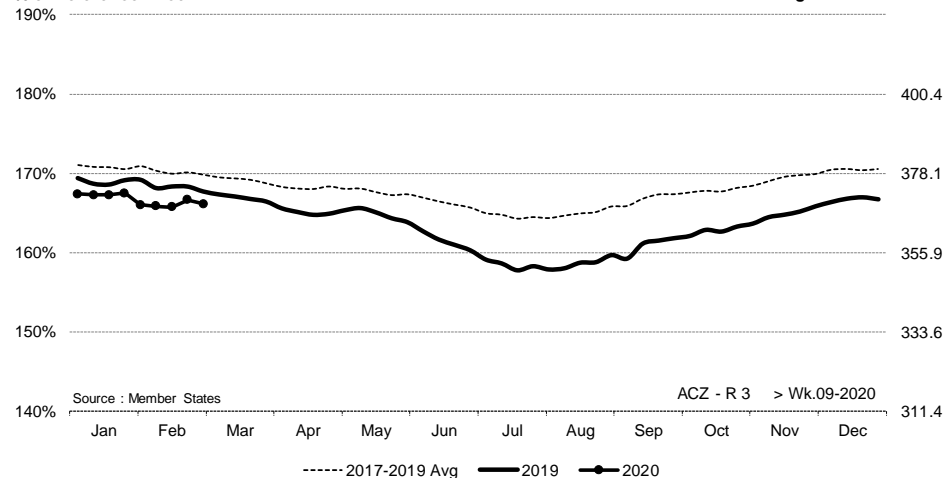


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ACZ - R 3 > Wk.09-2020

% of Reference Price

€/100 kg cwe



Price in week 09 : **369.54**

% change y/y : **- 0.9%**

% Ref. Price in wk 9 : **166.2%**

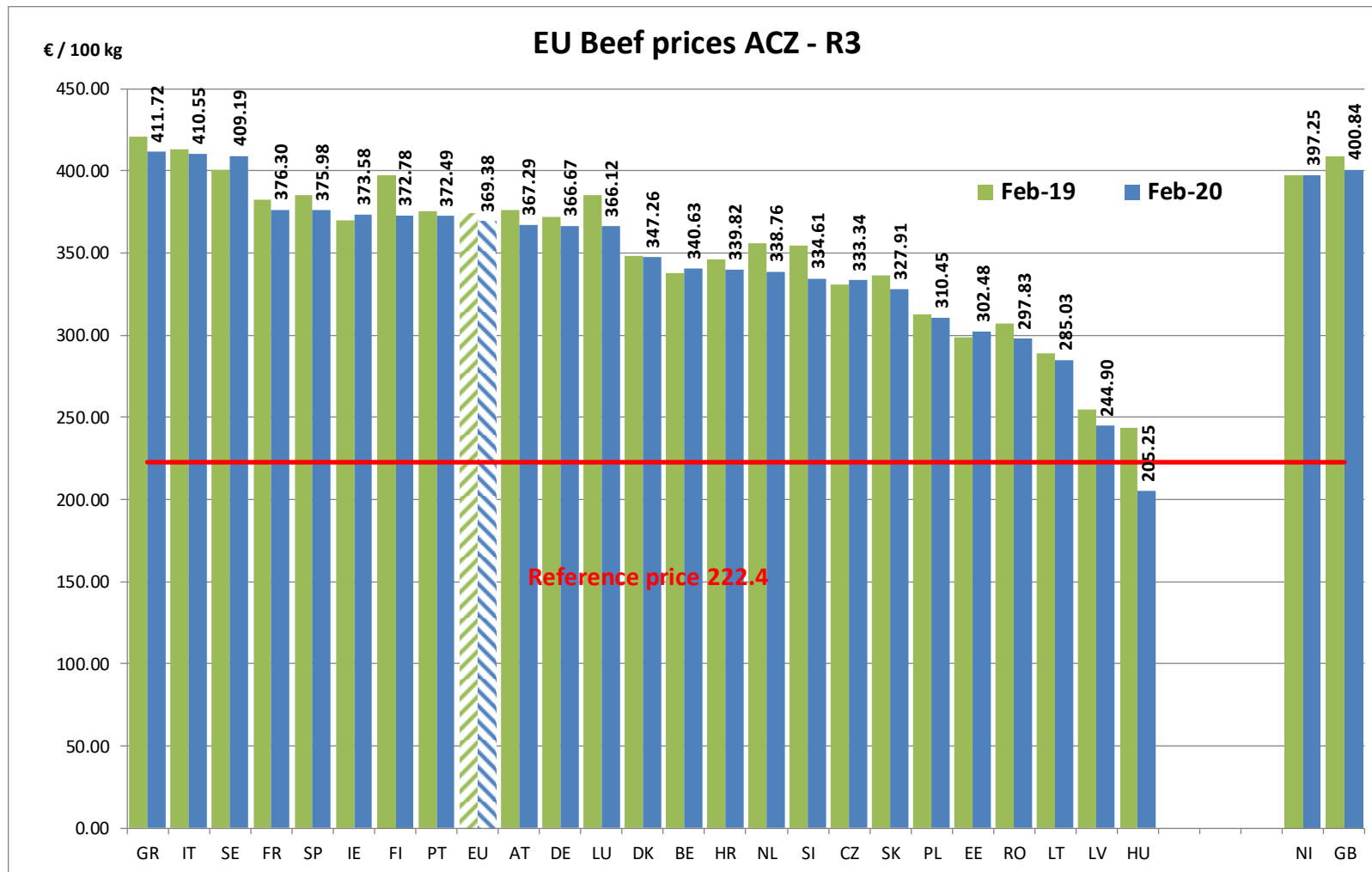
Average price in February 2020 : **369.38**

% change y/y : **- 1.3%**



# PRICES CARCASSES

EU EVOLUTION  
A/C/Z.R3

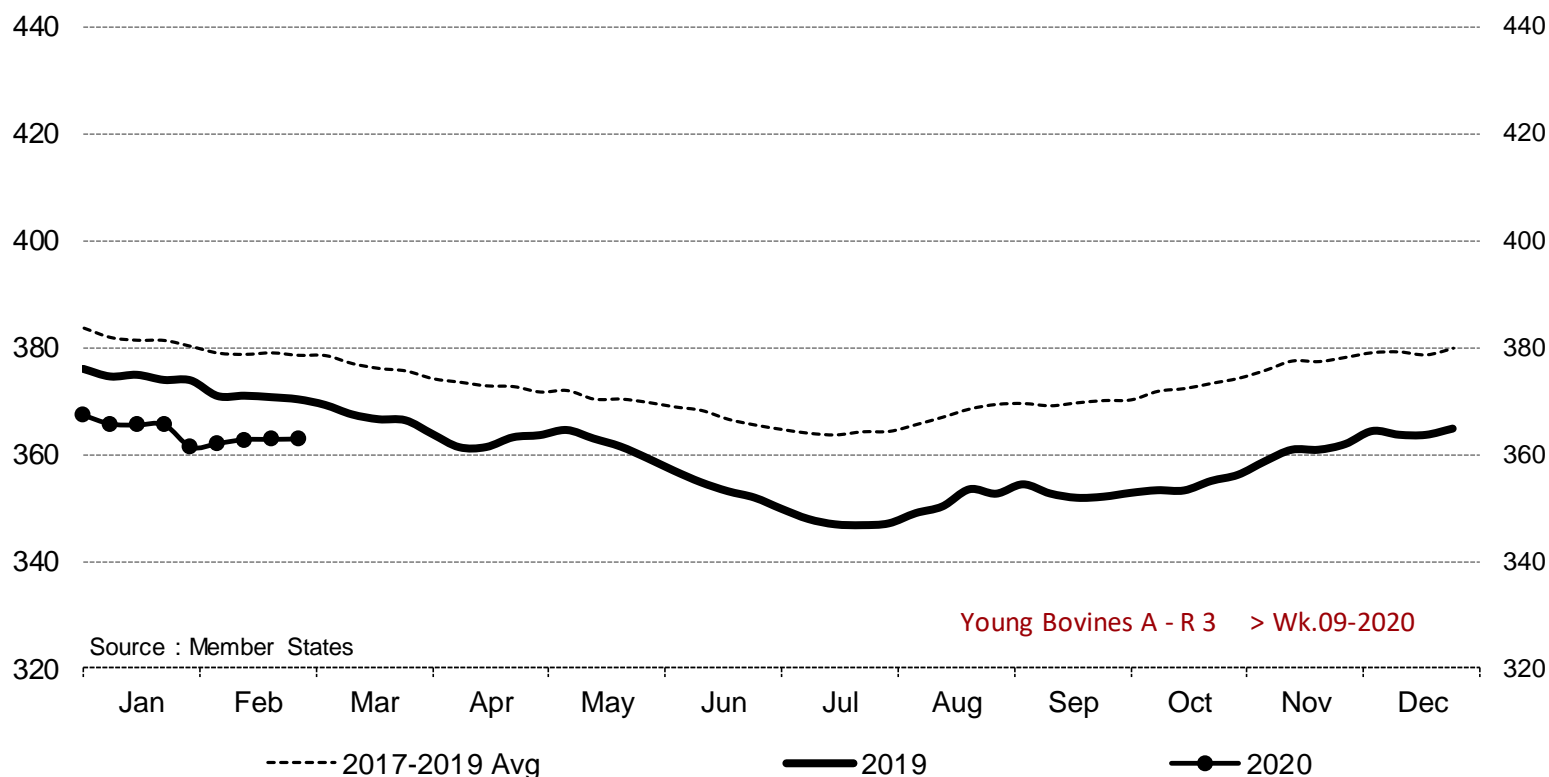


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# PRICES CARCASSES

# EU EVOLUTION YOUNG BULL - A.R3

Young Bovines A - R 3 > Wk.09-2020



Price in week 09 : **362.82**  
% change y/y : **- 2.0%**

Average price in February 2020 : **362.47**  
% change y/y : **- 2.4%**

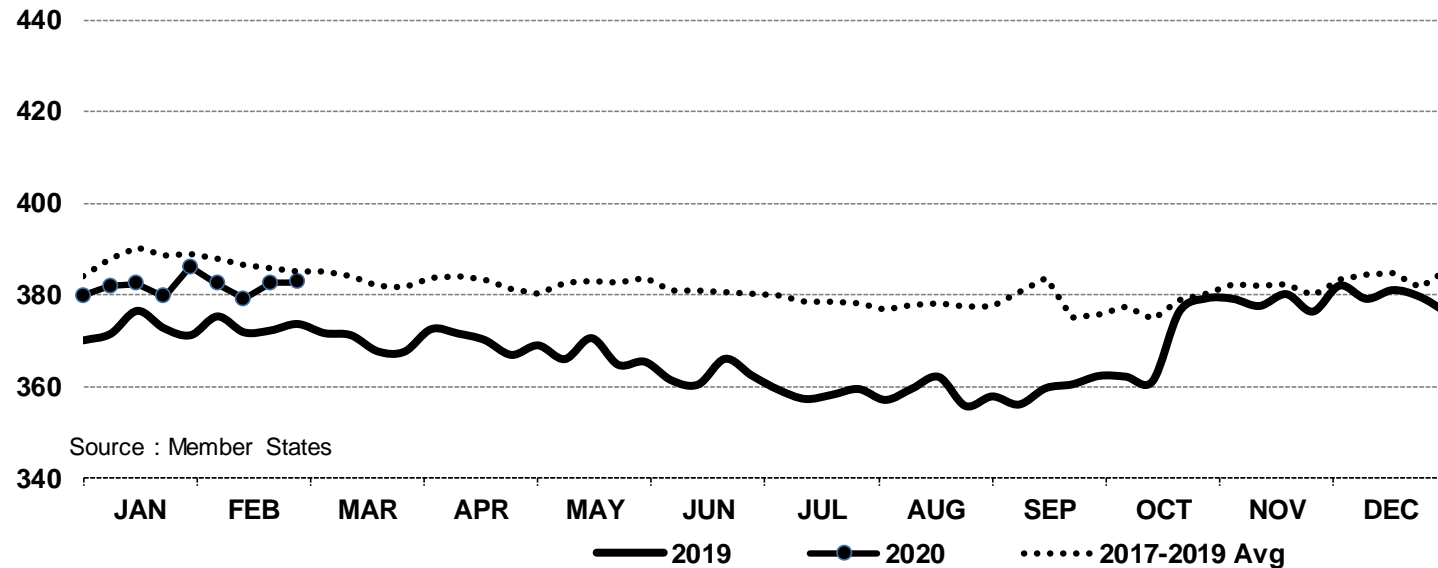
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# PRICES CARCASSES

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

In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.09-2020



Price in week 09 : **382.70**

03/02/2020

Average price in February 2020 : **381.96**

% change y/y : **+ 2.4%**

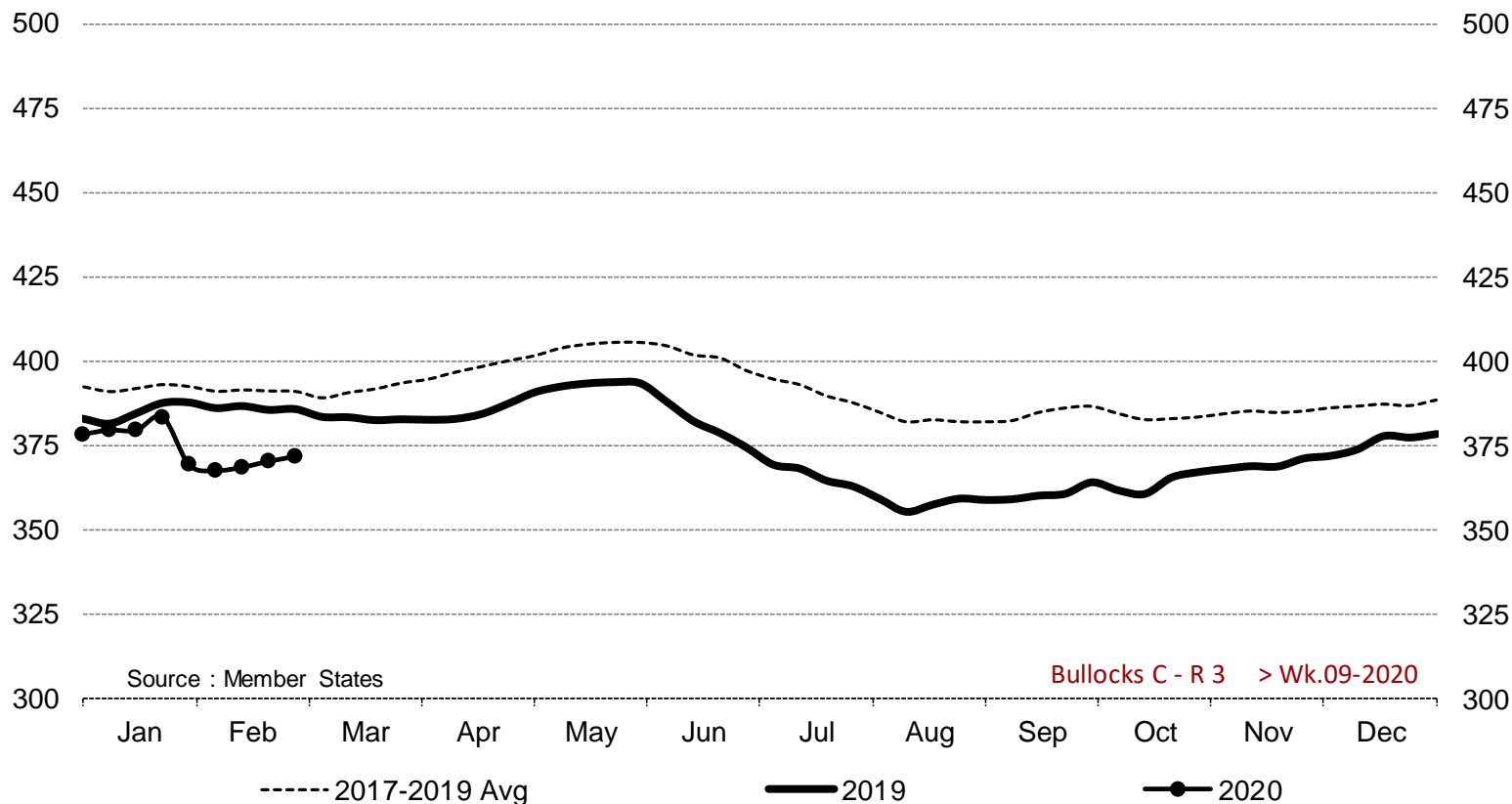
% change y/y : **+ 2.4%**

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# PRICES CARCASSES

# E.U. EVOLUTION STEER – C.R3

Bullocks C - R 3 > Wk.09-2020



Price in week 09 : **371.56**  
% change y/y : **- 3.6%**

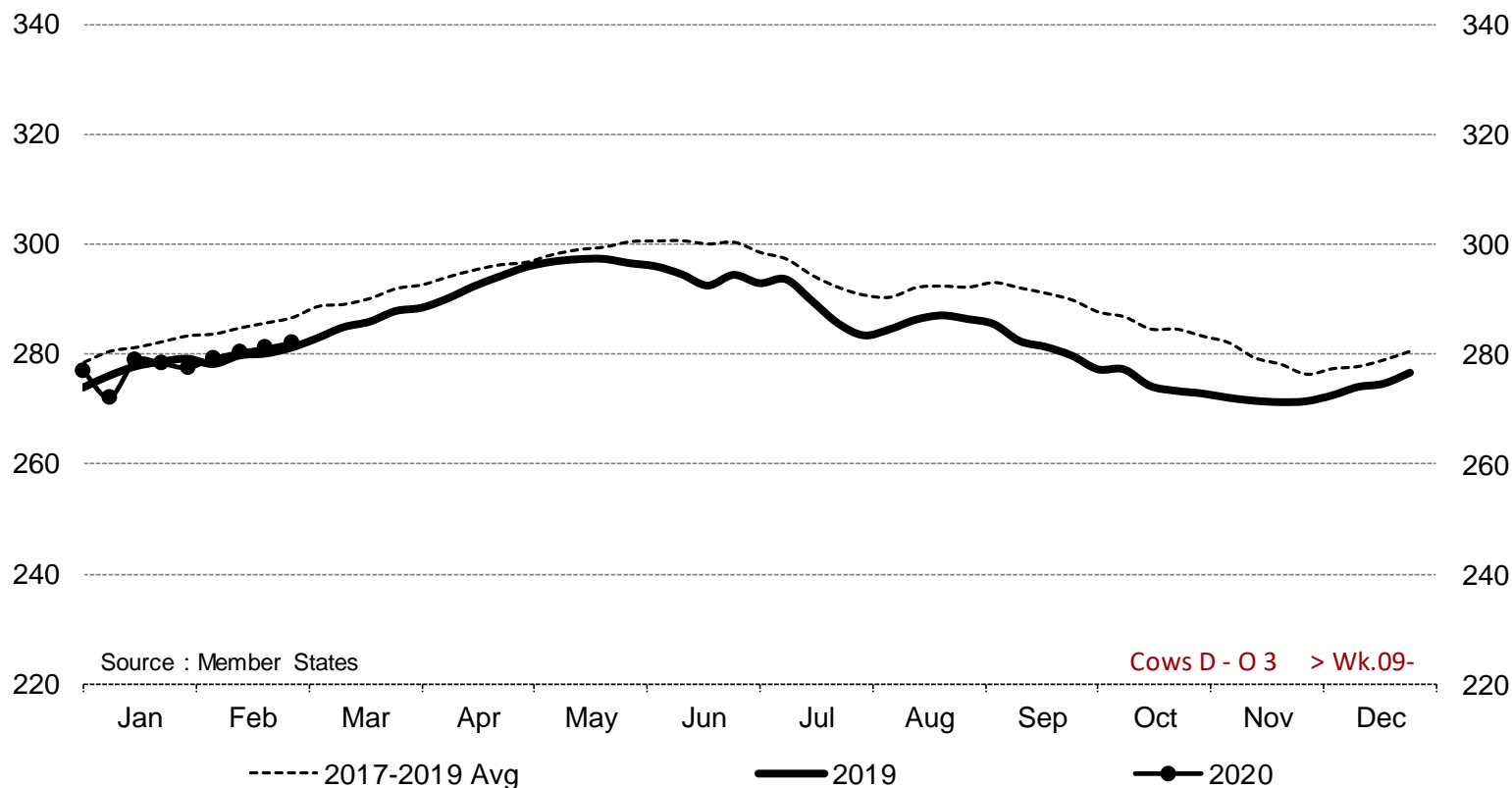
Average price in February 2020 : **369.31**  
% change y/y : **- 4.3%**

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# PRICES CARCASSES

E.U. EVOLUTION  
COW – D.03

Cows D - O 3 > Wk.09-2020



Price in week 09 : **282.11**  
% change y/y : **+ 0.4%**

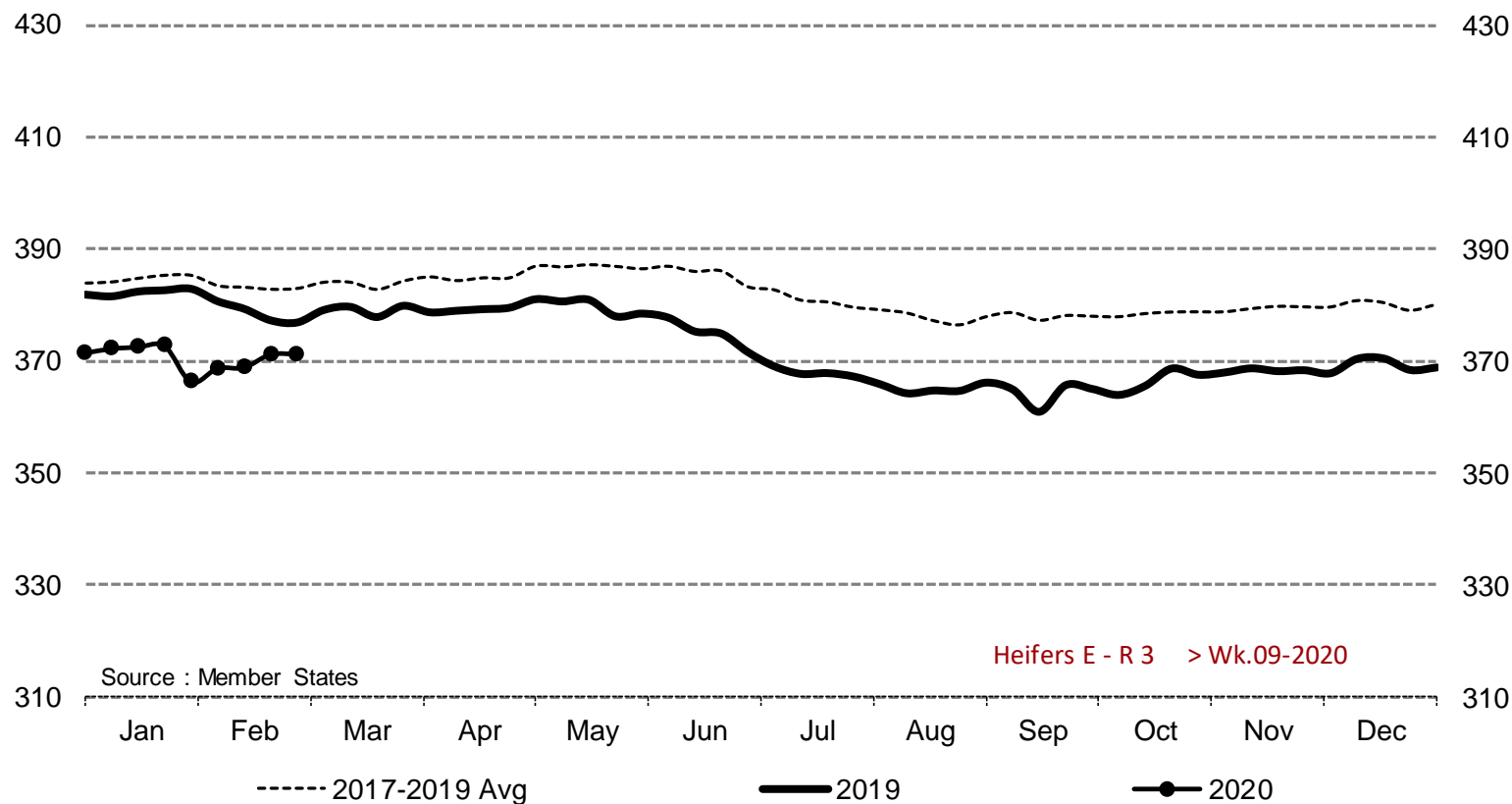
Average price in February 2020 : **280.47**  
% change y/y : **+ 0.3%**

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# PRICES CARCASSES

# EU EVOLUTION HEIFER - E.R3

Heifers E - R 3 > Wk.09-2020



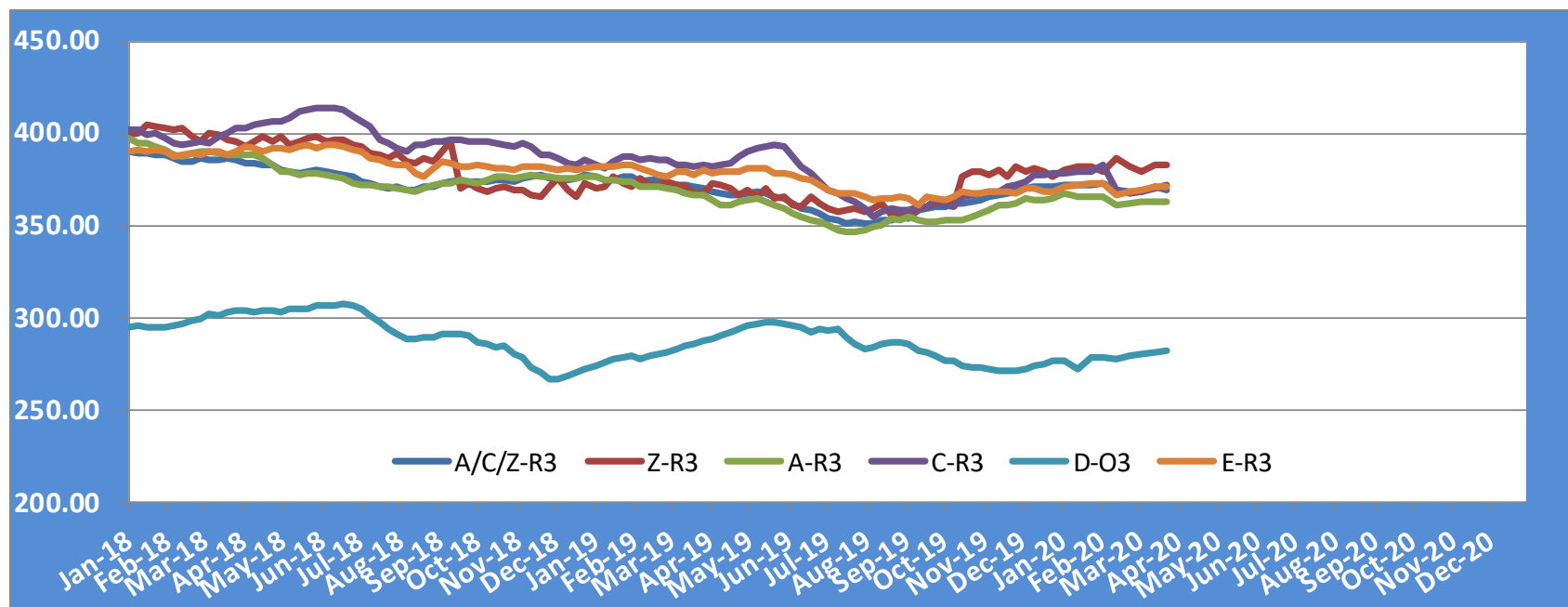
Price in week 09 : **371.29**  
% change y/y : **- 1.5%**

Average price in February 2020 : **369.76**  
% change y/y : **- 2.5%**

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# PRICES CARCASSES

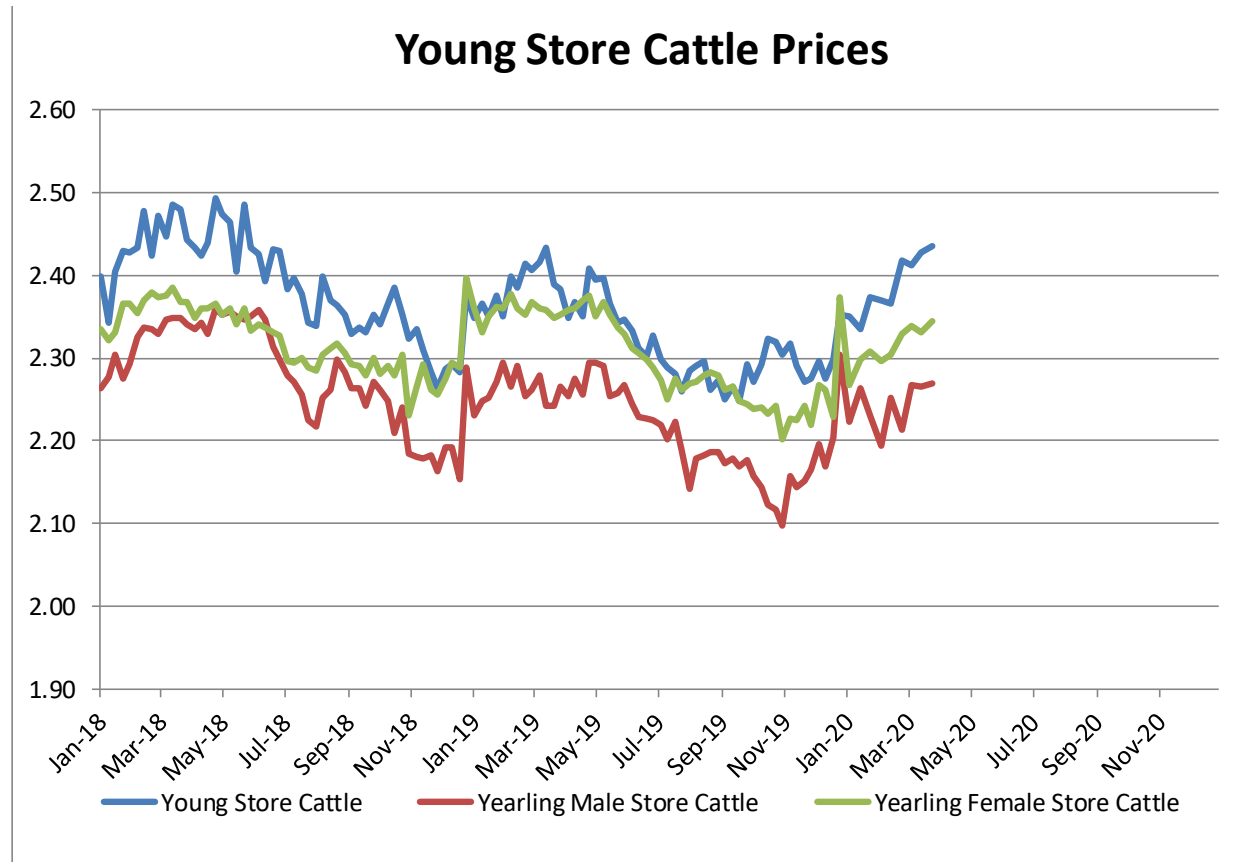
## EU EVOLUTION All CAT GLOBAL VIEW



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# PRICES LIVE BOVINES

# EU EVOLUTION STORE CATTLE



<b>Young Store Cattle Price in</b>	<b>Week 9</b>	<b>2.44</b>	<b>Yearling Male Store Cattle Price</b>	<b>2.27</b>
	Change y/y	-0.08%	Change y/y	+0.33%
<b>Yearling Female Store Cattle Price</b>		<b>2.34</b>		
	Change y/y	-3.40%		

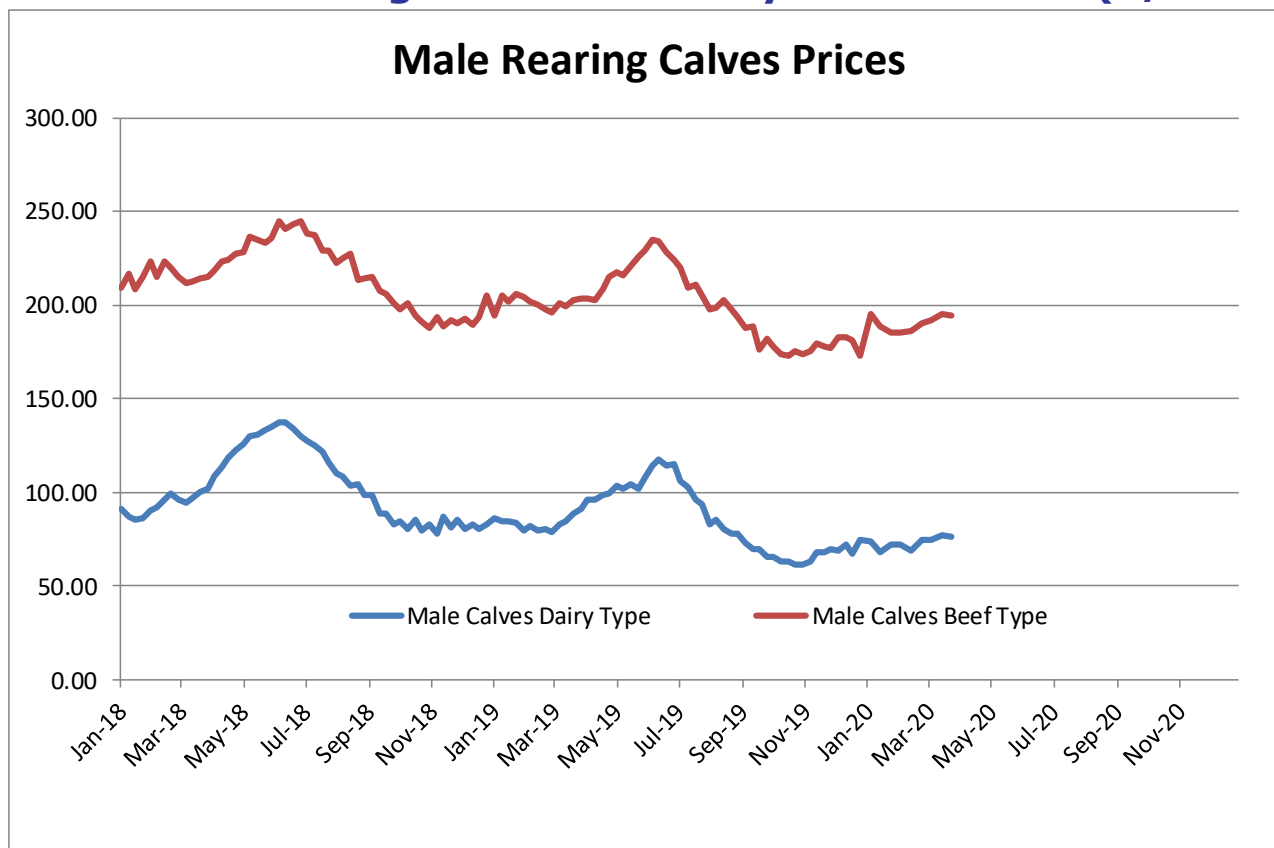
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# PRICES LIVE BOVINES

## EU EVOLUTION Male Calves – 8D4W

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



Male Rearing Calves Beef type

Price in Week 9 194.18  
Change y/y -2.52%

Male Rearing Calves Dairy type

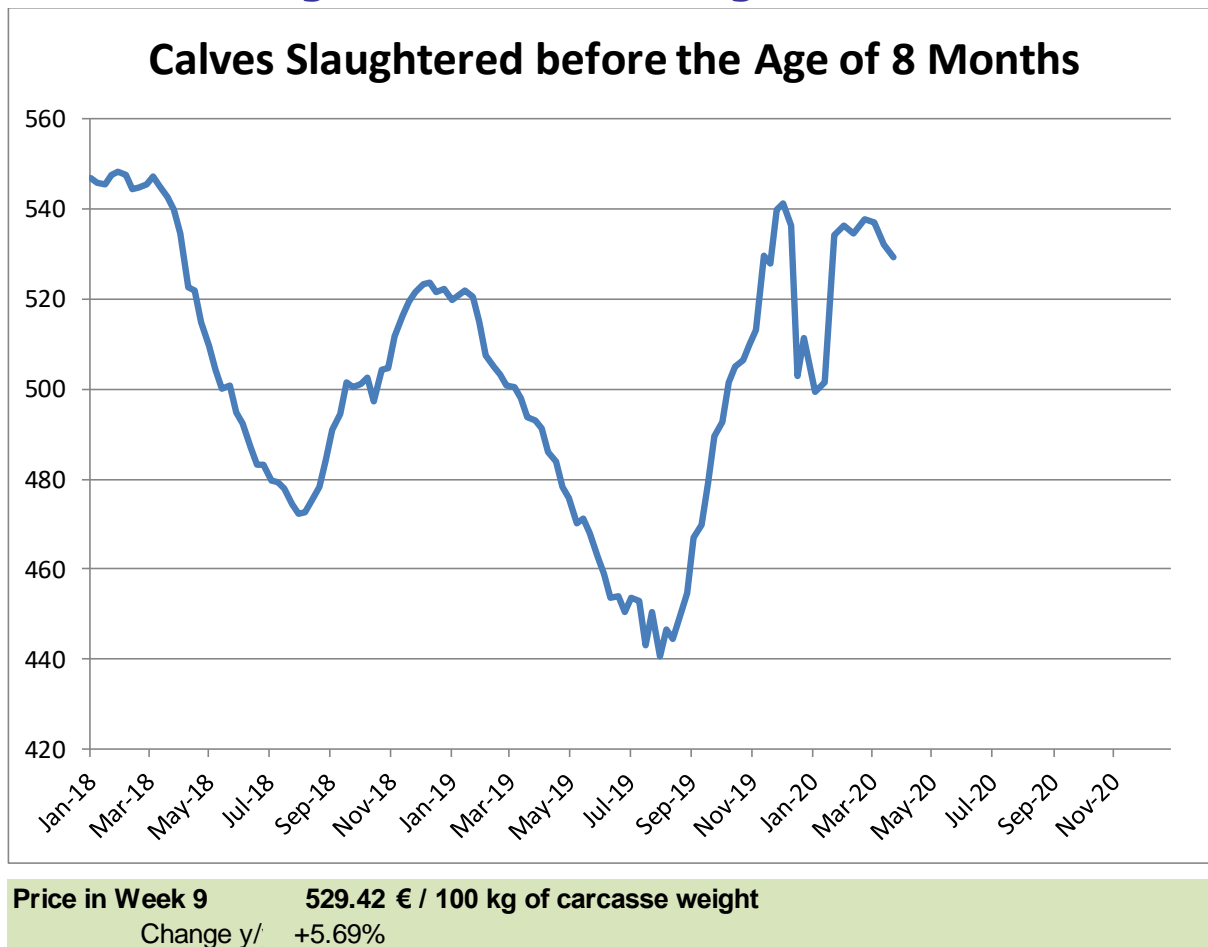
Price in Week 9 76.52  
Change y/y -9.51%

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# PRICES LIVE BOVINES

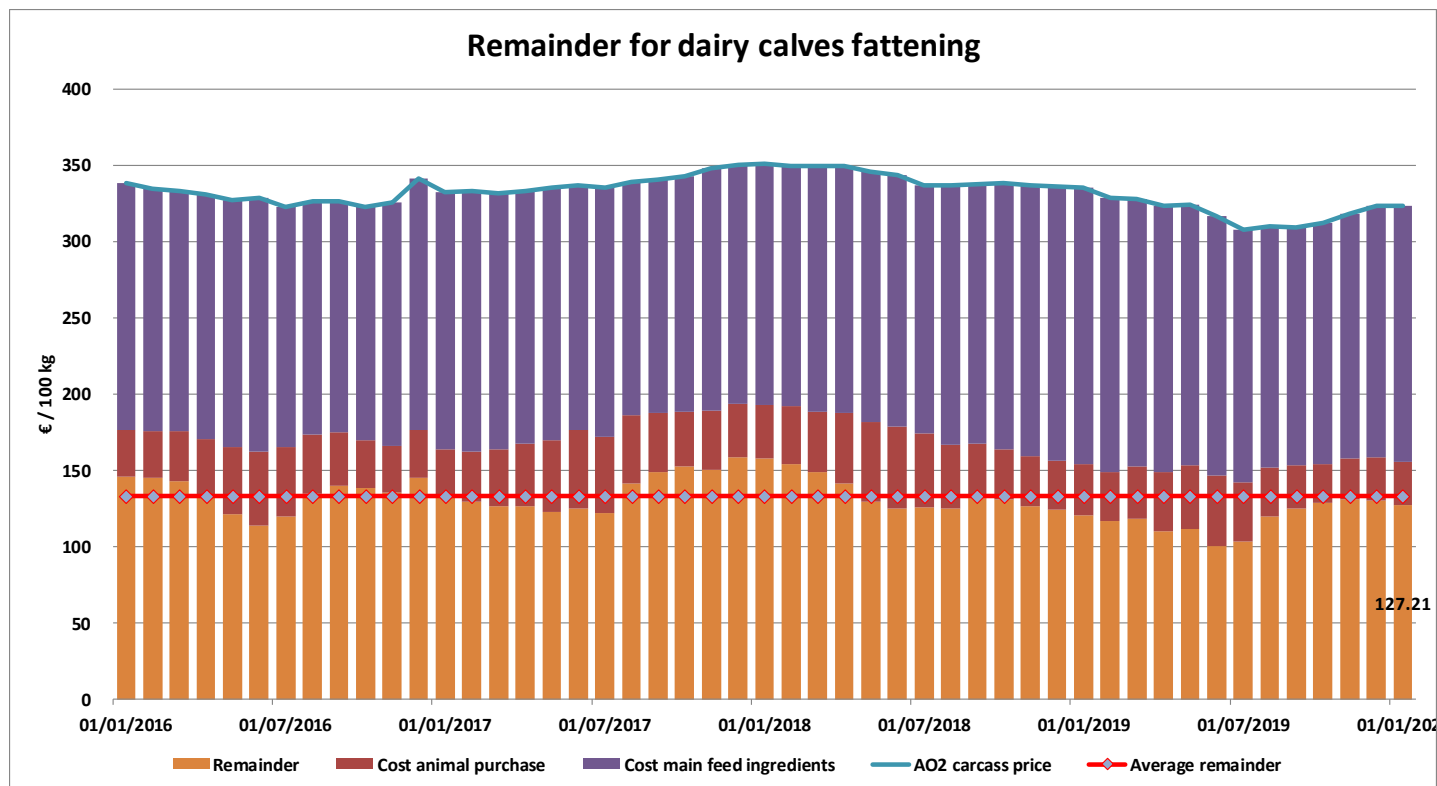
## EU EVOLUTION Butcher Calves

Calves slaughtered before the age of less than 8 months



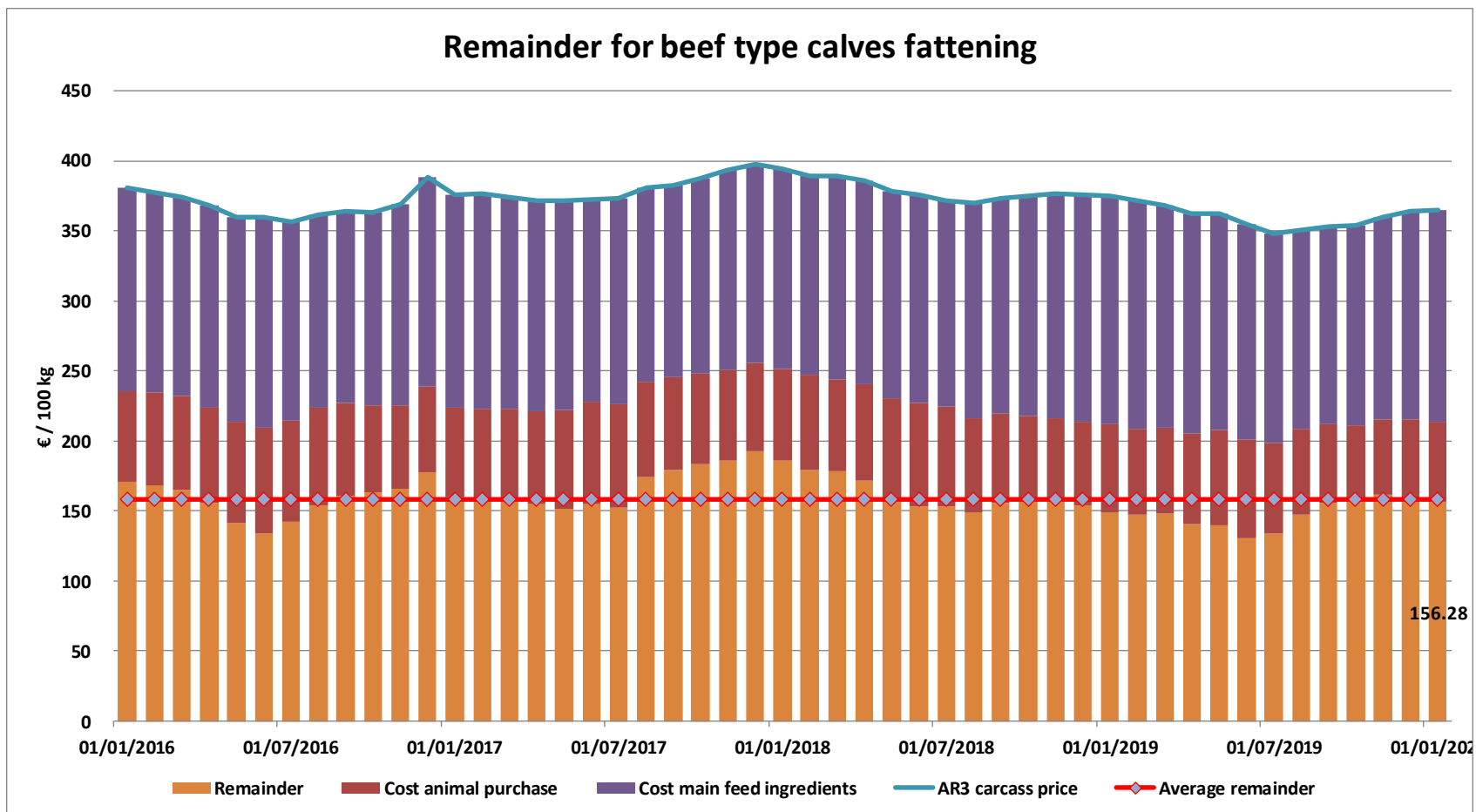
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# REMAINDERS



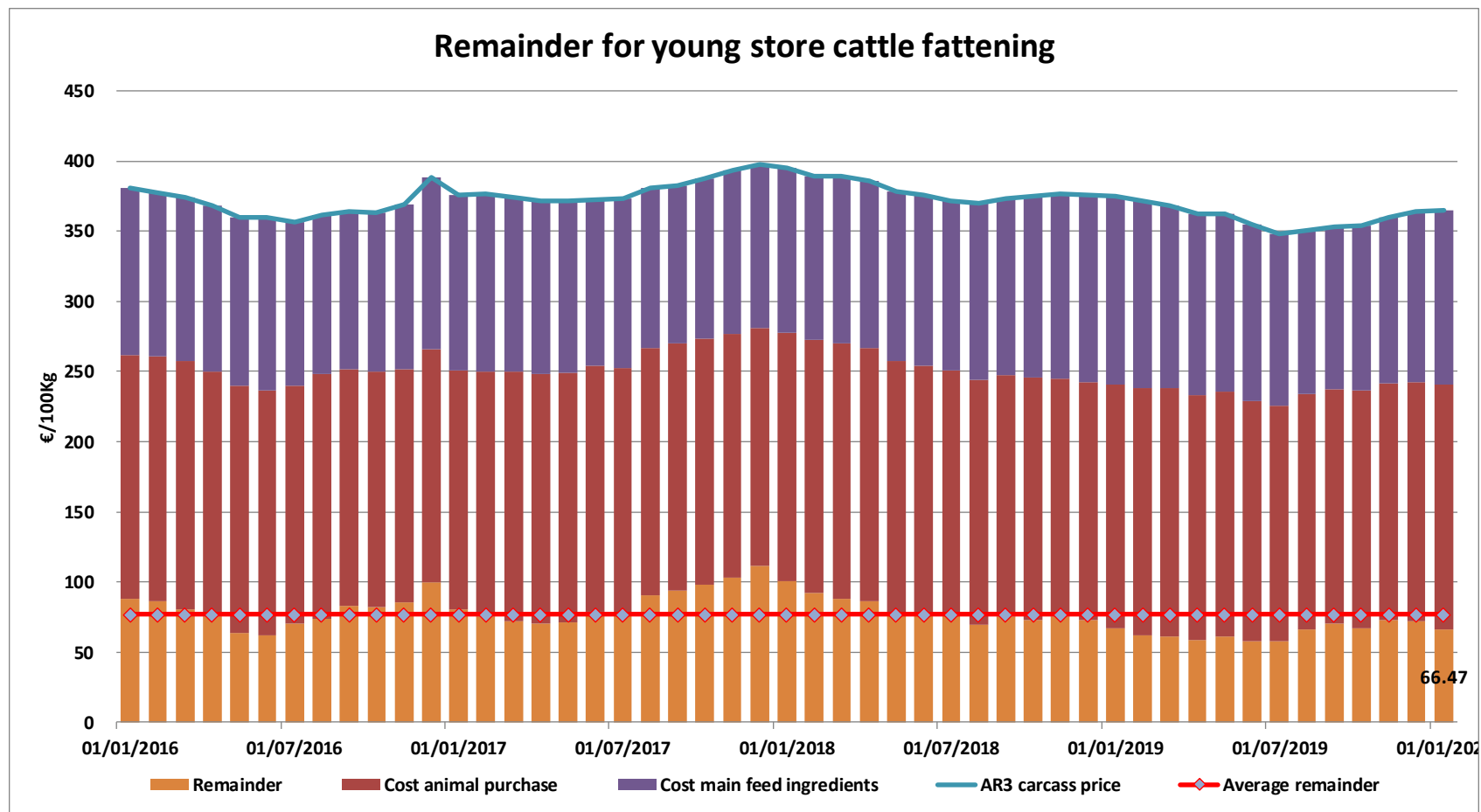
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# REMAINDERS



09 March 2020

# REMAINDERS



09 March 2020

# Forecast Summary

	2018	2019	2020	2021
<b>EU PRODUCTION</b> ( 1000T )	+ 1.61% 7 009	- 1.15% 6 929	- 1.71% 6 875	- 1.76% 6 762
<b>CONSUMPTION</b> ( 1000T )	+ 1.34% 6 474	- 0.92% 6 502	- 0.80% 6 457	- 0.92% 6 411
<b>BALANCE</b>	535	427	418	351
<b>EU - CARCASS PRICES</b>	2018	2019	2020	2021
<b>ADULT MALE BOVINES</b> ( €/100 kg )	+ 0.4% 372.9	- 3.98% 358.1	+ 3.74% 371.5	+ 0.79% 374.4
<b>COWS</b> ( €/100 kg )	+ 2.5% 293.4	- 3.98% 282.0	+ 1.08% 285.1	+ 2.20% 291.4

Sources : EStat New Cronos, Member States

09 March 2020

# TRADE

# EU + UK EXPORTS

## Beef & Live Animals

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

Destinations	2015		2016		2017		2018		Jan-Dec 19		Compared to Jan-Dec 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	45 198	7.5%	58 382	8.3%	90 628	11.9%	69 954	9.5%	63 092	8.5%	- 9.8%
Algeria	16 086	2.7%	25 003	3.5%	26 305	3.4%	35 410	4.8%	57 152	7.7%	+ 61.4%
Israel	18 850	3.1%	41 534	5.9%	44 196	5.8%	47 776	6.5%	49 684	6.7%	+ 4.0%
Ghana	39 224	6.6%	39 680	5.6%	40 972	5.4%	39 850	5.4%	43 406	5.8%	+ 8.9%
Bosnia-Herz.	39 896	6.7%	38 875	5.5%	34 710	4.5%	38 762	5.3%	41 145	5.5%	+ 6.1%
Philippines	13 053	2.2%	24 454	3.5%	38 222	5.0%	29 794	4.1%	38 277	5.1%	+ 28.5%
Lebanon	50 263	8.4%	47 033	6.7%	38 527	5.0%	42 569	5.8%	36 398	4.9%	- 14.5%
Ivory Coast	36 018	6.0%	37 210	5.3%	38 406	5.0%	37 463	5.1%	35 192	4.7%	- 6.1%
Turkey	57 504	9.6%	71 030	10.1%	96 414	12.6%	95 622	13.0%	34 063	4.6%	- 64.4%
China	6 027	1.0%	10 804	1.5%	6 229	0.8%	7 457	1.0%	26 248	3.5%	+++
Switzerland	26 016	4.3%	25 598	3.6%	27 368	3.6%	24 416	3.3%	25 735	3.5%	+ 5.4%
Libya	19 691	3.3%	29 723	4.2%	27 848	3.6%	27 878	3.8%	24 541	3.3%	- 12.0%
Russia	13 545	2.3%	16 434	2.3%	22 989	3.0%	17 337	2.4%	19 762	2.7%	+ 14.0%
Ukraine	2 859	0.5%	7 875	1.1%	7 331	1.0%	10 466	1.4%	13 835	1.9%	+ 32.2%
Morocco	4 703	0.8%	7 517	1.1%	10 005	1.3%	11 430	1.6%	12 982	1.7%	+ 13.6%
Chile	50	0.0%	2 228	0.3%	8 961	1.2%	16 410	2.2%	12 461	1.7%	- 24.1%
North Macedonia	12 561	2.1%	11 804	1.7%	11 541	1.5%	10 191	1.4%	11 949	1.6%	+ 17.2%
Other Destinations	197 171	32.9%	211 522	29.9%	193 123	25.3%	170 566	23.3%	199 279	26.7%	
Extra-EU28	598 715		706 705		763 775		733 350		745 203		
% change			+ 18%		+ 8%		- 4%		+ 1.6%		

# TRADE

# EU + UK EXPORTS

## Beef

### EU + UK Exports of Beef: Trade figures (COMEXT – tonnes cwe)

Destinations	2015		2016		2017		2018		Jan-Dec 19		Compared to Jan-Dec 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	45 198	10.7%	58 382	12.0%	90 628	17.1%	69 954	14.0%	63 092	12.1%	- 9.8%
Ghana	39 224	9.3%	39 680	8.1%	40 972	7.8%	39 850	8.0%	43 406	8.3%	+ 8.9%
Bosnia-Herz.	36 594	8.7%	36 790	7.6%	32 180	6.1%	36 151	7.2%	38 832	7.5%	+ 7.4%
Philippines	13 053	3.1%	24 454	5.0%	38 222	7.2%	29 794	6.0%	38 277	7.3%	+ 28.5%
Ivory Coast	36 016	8.6%	37 210	7.6%	38 397	7.3%	37 463	7.5%	35 192	6.8%	- 6.1%
China	6 027	1.4%	10 804	2.2%	6 229	1.2%	7 457	1.5%	26 247	5.0%	+++
Switzerland	25 007	5.9%	24 425	5.0%	26 230	5.0%	23 365	4.7%	24 655	4.7%	+ 5.5%
Israel	6 087	1.4%	15 055	3.1%	18 749	3.5%	22 163	4.4%	23 073	4.4%	+ 4.1%
Algeria	6 663	1.6%	10 726	2.2%	12 304	2.3%	13 919	2.8%	19 142	3.7%	+ 37.5%
Ukraine	2 747	0.7%	7 094	1.5%	6 926	1.3%	9 887	2.0%	12 893	2.5%	+ 30.4%
Chile	50	0.0%	2 228	0.5%	8 961	1.7%	16 410	3.3%	12 461	2.4%	- 24.1%
North Macedonia	12 375	2.9%	11 478	2.4%	11 285	2.1%	10 002	2.0%	11 370	2.2%	+ 13.7%
Vietnam	11 880	2.8%	22 308	4.6%	14 205	2.7%	9 137	1.8%	10 819	2.1%	+ 18.4%
South Africa	7 508	1.8%	7 335	1.5%	7 569	1.4%	12 092	2.4%	9 451	1.8%	- 21.8%
Canada	19	0.0%	1 753	0.4%	3 053	0.6%	2 881	0.6%	9 265	1.8%	+++
Japan	2 226	0.5%	3 265	0.7%	4 292	0.8%	3 453	0.7%	8 772	1.7%	+ 154.0%
USA	2 633	0.6%	3 855	0.8%	4 575	0.9%	5 830	1.2%	8 535	1.6%	+ 46.4%
Other Destinations	167 518	39.8%	170 047	34.9%	163 855	31.0%	148 887	29.9%	125 316	24.1%	
Extra-EU28	420 822		486 890		528 631		498 694		520 796		
% change			+ 16%		+ 9%		- 6%		+ 4.4%		



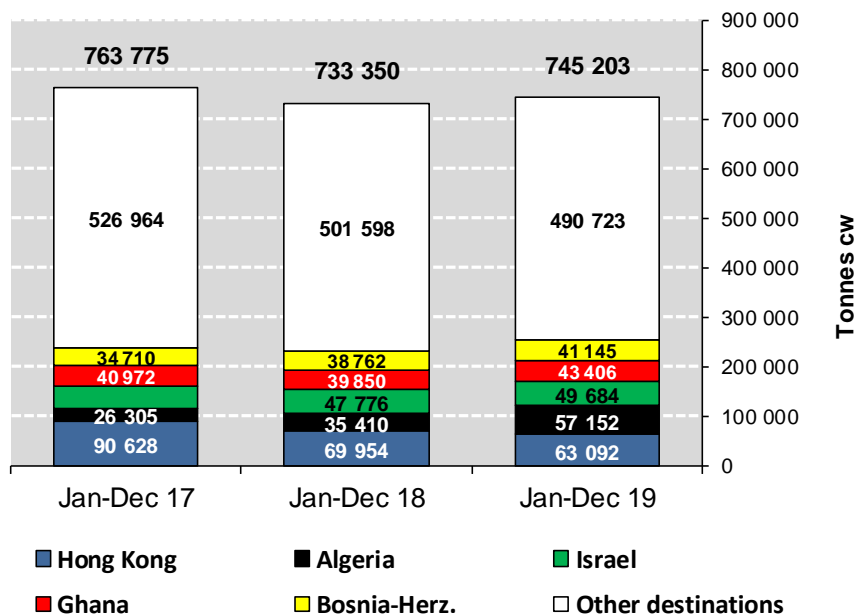
# TRADE

## EU + UK EXPORTS

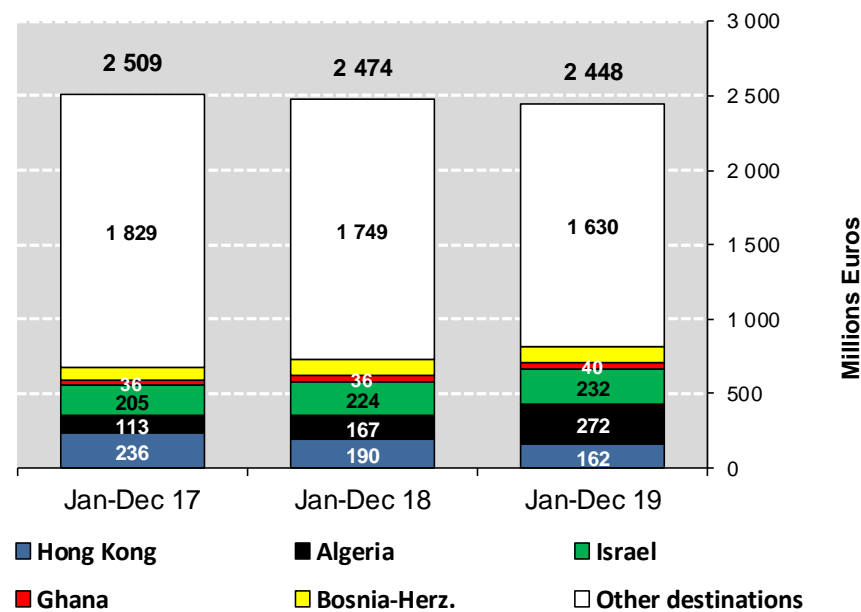
### Beef & Live Animals

#### EU + UK Exports of Beef and Live Animals: Trade figures (COMEXT)

EU+UK EXPORTS of Beef & Veal (Tonnes cwe)



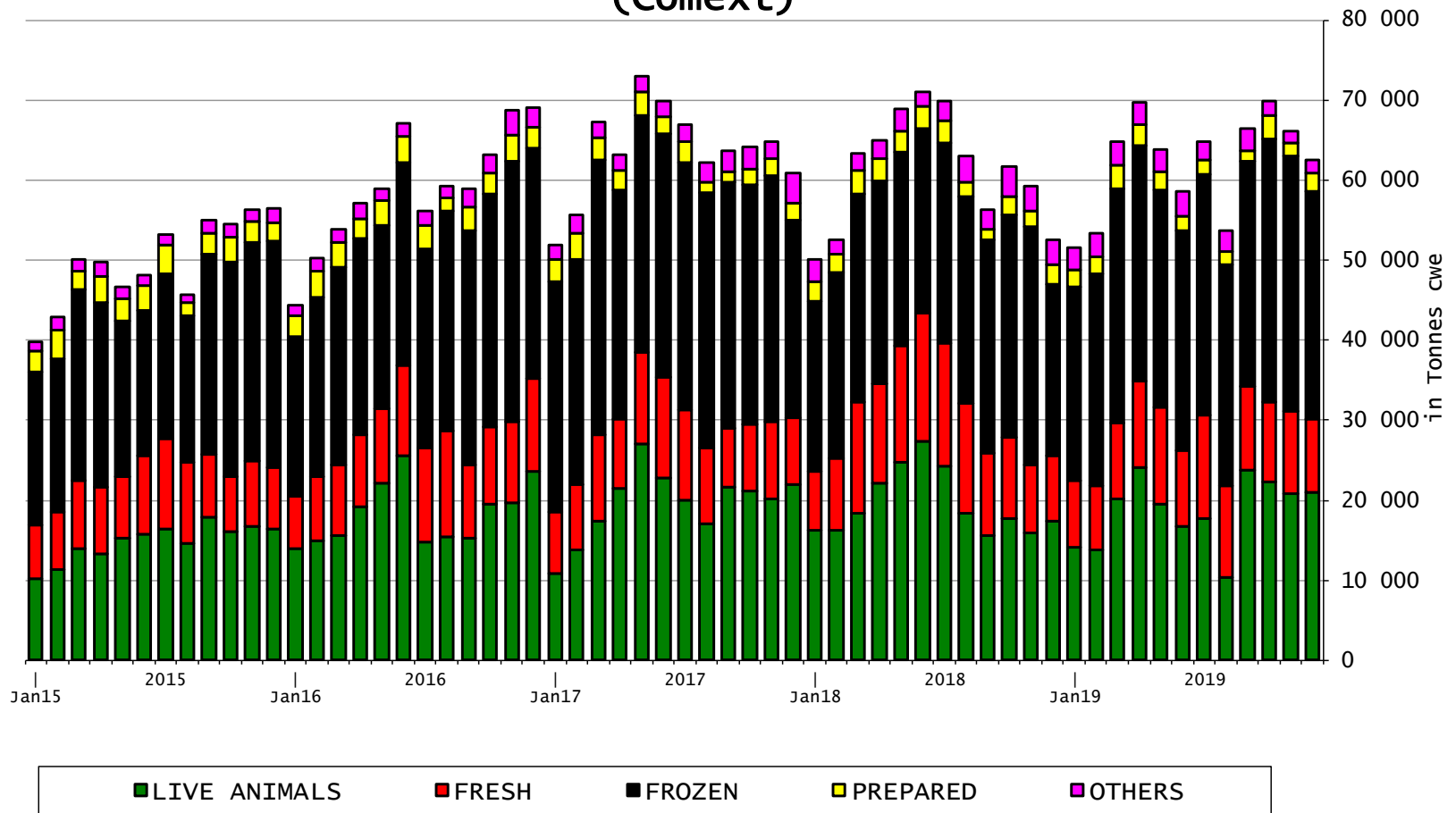
EU+UK EXPORTS of Beef & Veal (Million EUR)



# TRADE

## EU+UK EXPORTS Beef Products

EU+UK Exports of BEEF products  
(Comext)

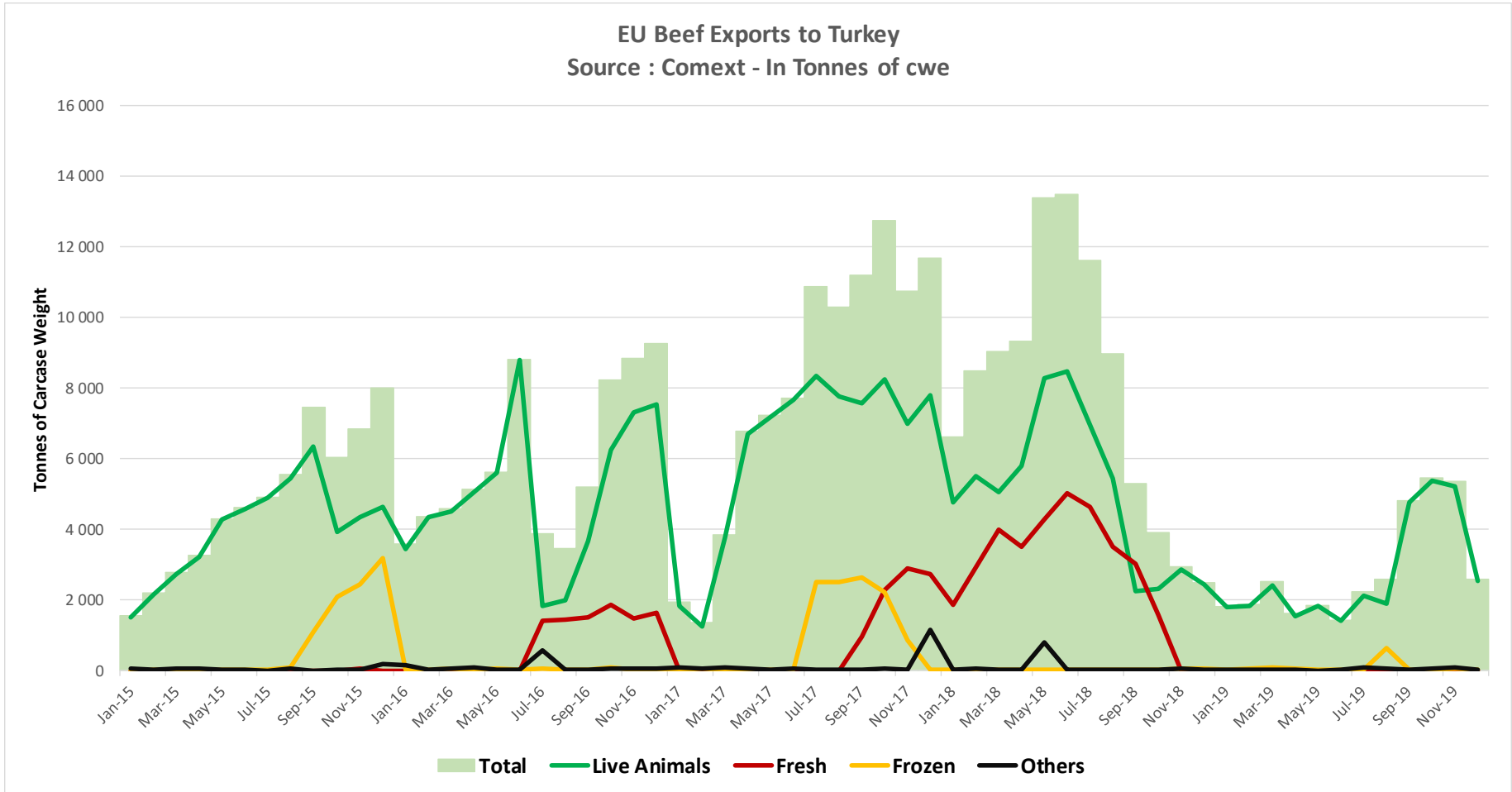


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# TRADE

## EU+UK EXPORTS Beef to TURKEY

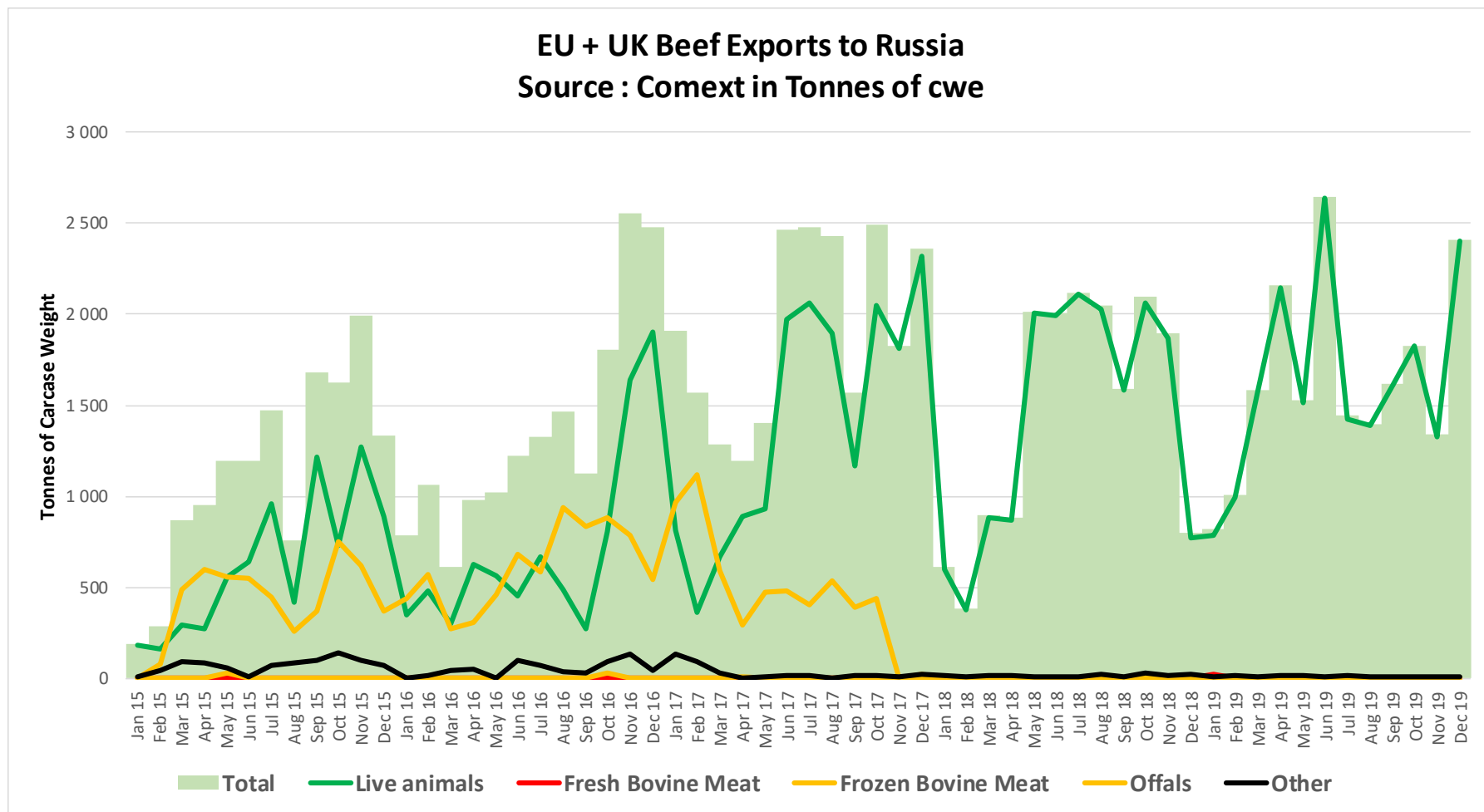
**EU + UK Beef Exports to TURKEY**  
Trade figures (COMEXT data) *tonnes cwe*



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# TRADE

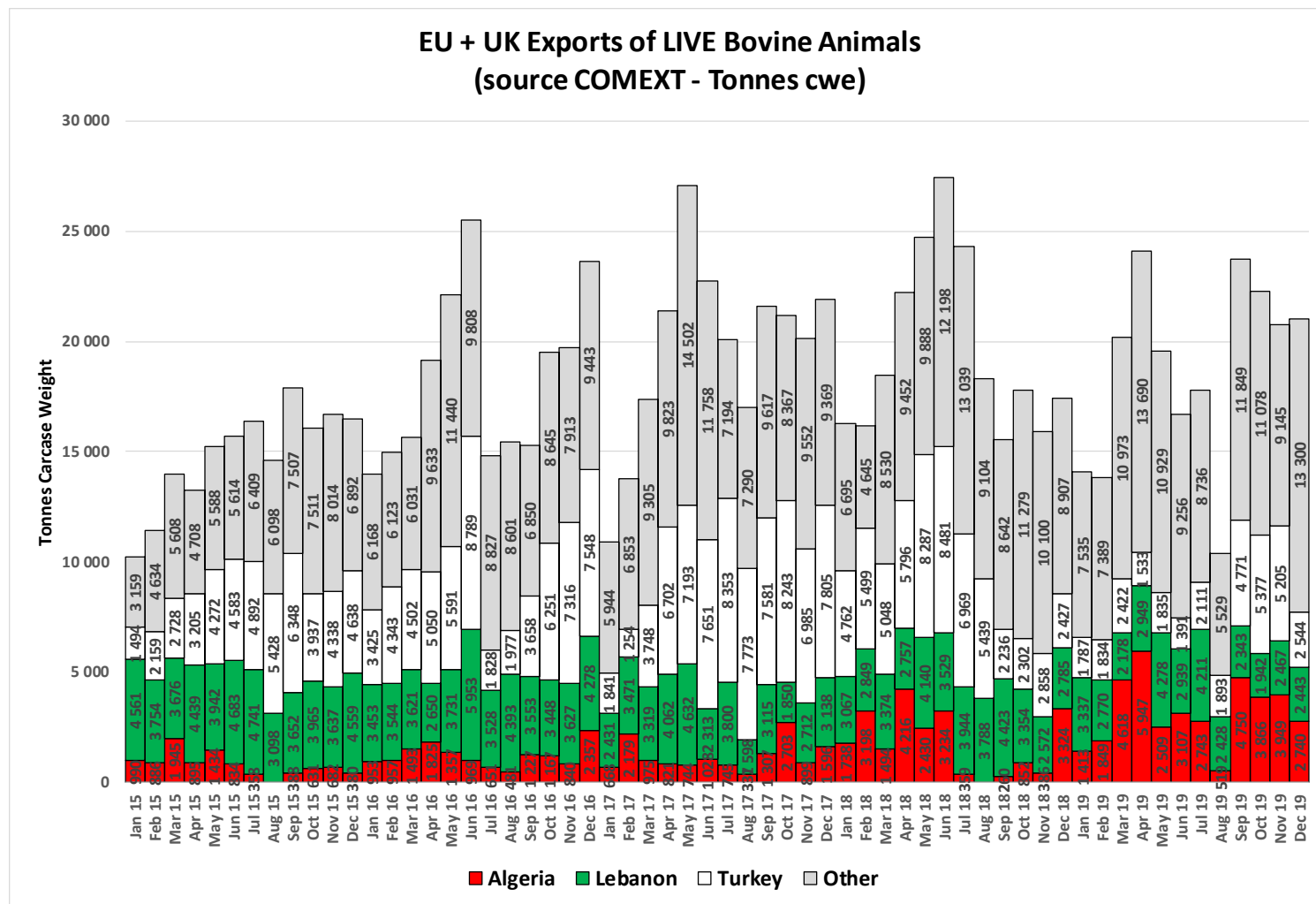
## EU+UK EXPORTS Beef to RUSSIA



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# TRADE

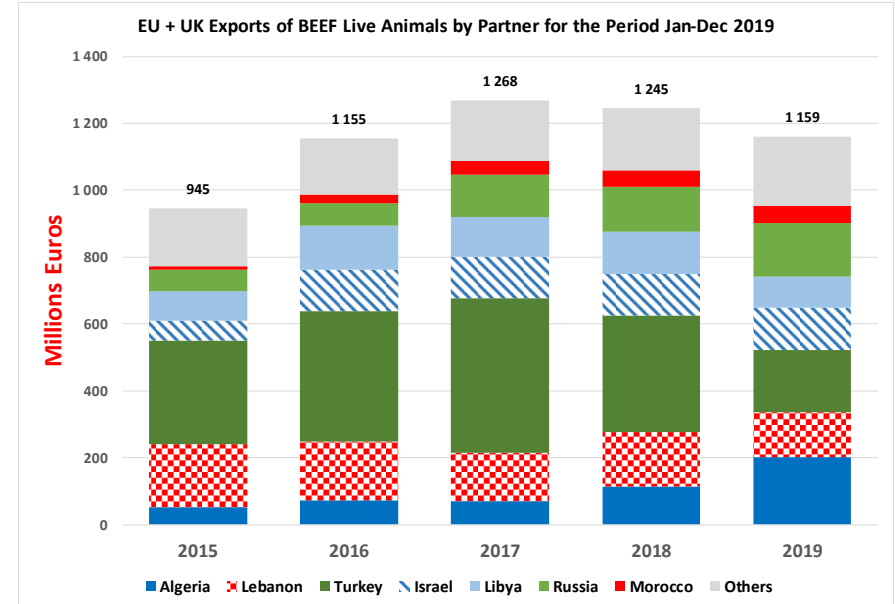
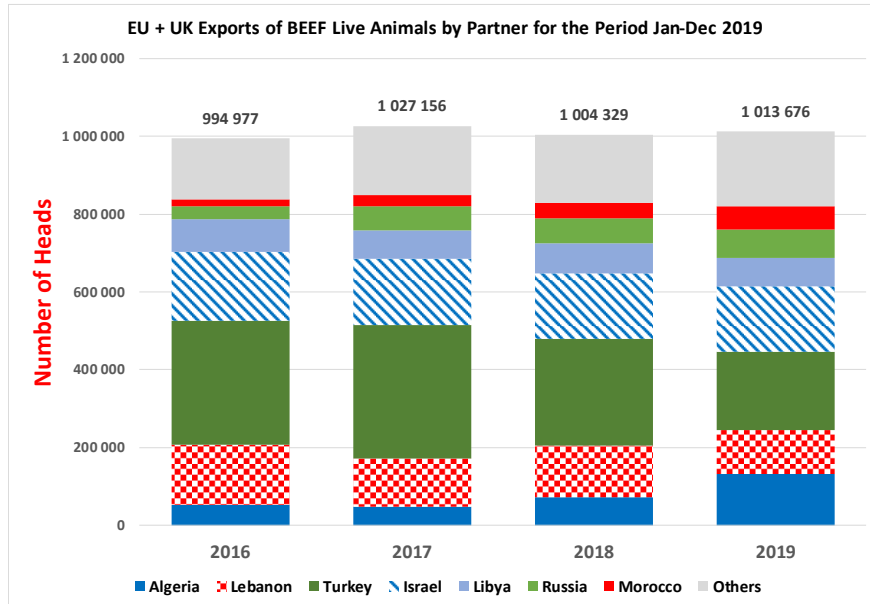
# EU+UK EXPORTS Live Animals



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# TRADE

## EU + UK EXPORTS Live Animals



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# TRADE

## EU + UK IMPORTS

### Beef & Live Animals

#### EU + UK Imports of Beef and Live Animals (1): Trade Figures (COMEXT – tonnes cwe)

Origins	2015		2016		2017		2018		Jan-Dec 19		Compared to Jan-Dec 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	136 858	42.4%	140 319	42.0%	115 392	37.7%	140 272	41.1%	128 337	40.3%	- 8.5%
Argentina	42 149	13.0%	43 541	13.0%	49 890	16.3%	69 996	20.5%	71 613	22.5%	+ 2.3%
Uruguay	46 287	14.3%	56 748	17.0%	57 985	18.9%	52 428	15.4%	43 879	13.8%	- 16.3%
Australia	30 884	9.6%	27 850	8.3%	21 991	7.2%	20 867	6.1%	18 800	5.9%	- 9.9%
USA	24 132	7.5%	20 499	6.1%	21 624	7.1%	19 320	5.7%	16 897	5.3%	- 12.5%
Namibia	12 112	3.7%	10 685	3.2%	7 705	2.5%	5 585	1.6%	10 417	3.3%	+ 86.5%
New Zealand	11 380	3.5%	9 869	3.0%	8 094	2.6%	8 664	2.5%	7 457	2.3%	- 13.9%
Paraguay	1 914	0.6%	5 979	1.8%	6 915	2.3%	6 288	1.8%	5 235	1.6%	- 16.7%
Botswana	9 258	2.9%	9 382	2.8%	7 718	2.5%	6 994	2.1%	5 008	1.6%	- 28.4%
Switzerland	5 089	1.6%	5 500	1.6%	5 138	1.7%	5 437	1.6%	4 432	1.4%	- 18.5%
Canada	428	0.1%	421	0.1%	513	0.2%	1 343	0.4%	2 518	0.8%	+ 87.5%
Serbia	439	0.1%	557	0.2%	565	0.2%	1 162	0.3%	1 062	0.3%	- 8.6%
Japan	359	0.1%	579	0.2%	694	0.2%	859	0.3%	979	0.3%	+ 13.9%
Chile	713	0.2%	606	0.2%	324	0.1%	386	0.1%	436	0.1%	+ 13.0%
Ukraine	19	0.0%	317	0.1%	374	0.1%	257	0.1%	410	0.1%	+ 59.8%
N.det.Extra	51	0.0%	45	0.0%	72	0.0%	127	0.0%	196	0.1%	+ 54.3%
Israel	0	0.0%	0	0.0%	20	0.0%	0	0.0%	160	0.1%	+++
Other Destinations	1 027	0.3%	1 053	0.3%	1 052	0.3%	1 027	0.3%	581	0.2%	
Extra-EU28	323 098		333 951		306 065		341 012		318 417		
% change			+ 3%		- 8%		+ 11%		- 6.6%		

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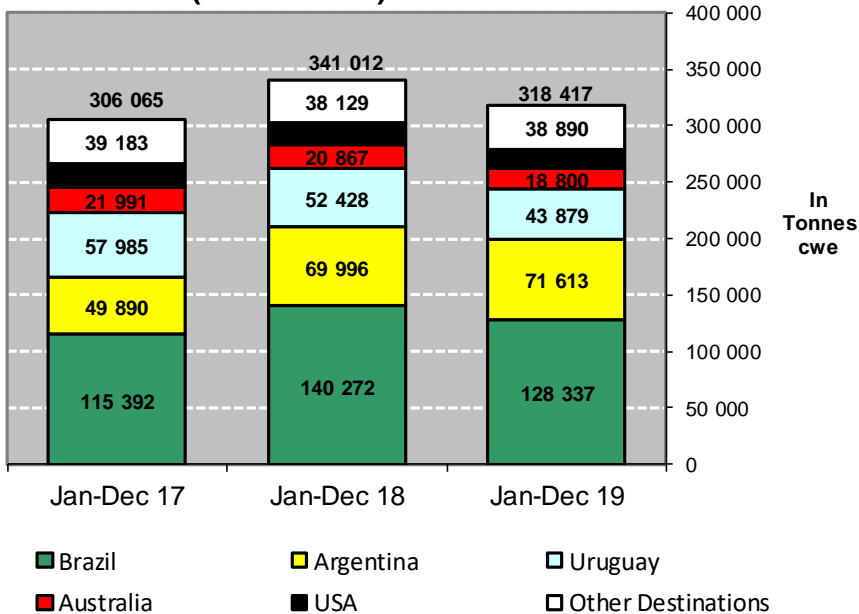
# TRADE

## EU + UK IMPORTS

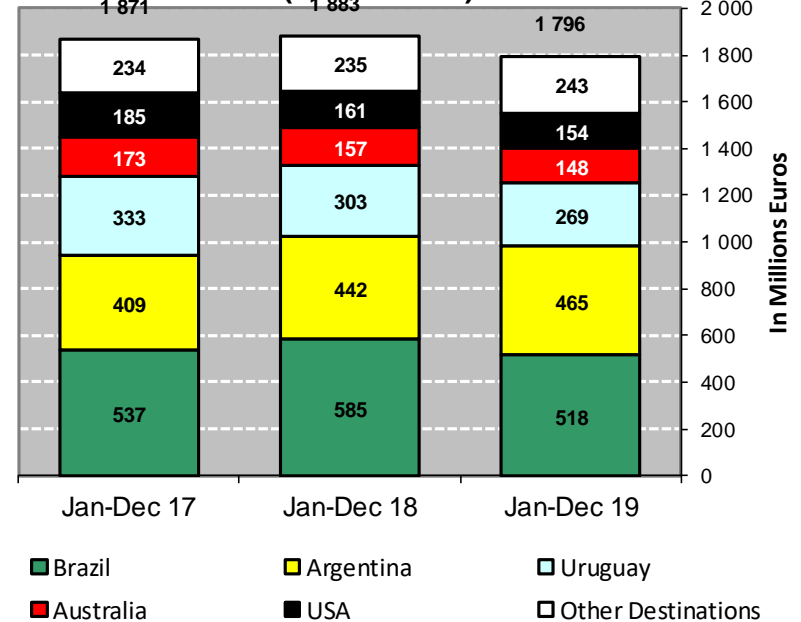
### Beef & Live Animals

#### EU + UK Imports of Beef and Live Animals (2): Trade Figures (COMEXT)

**IMPORTS of Beef & Veal into EU+UK  
(Tonnes cwe)**



**IMPORTS of Beef & Veal into EU+UK  
(Million EUR)**



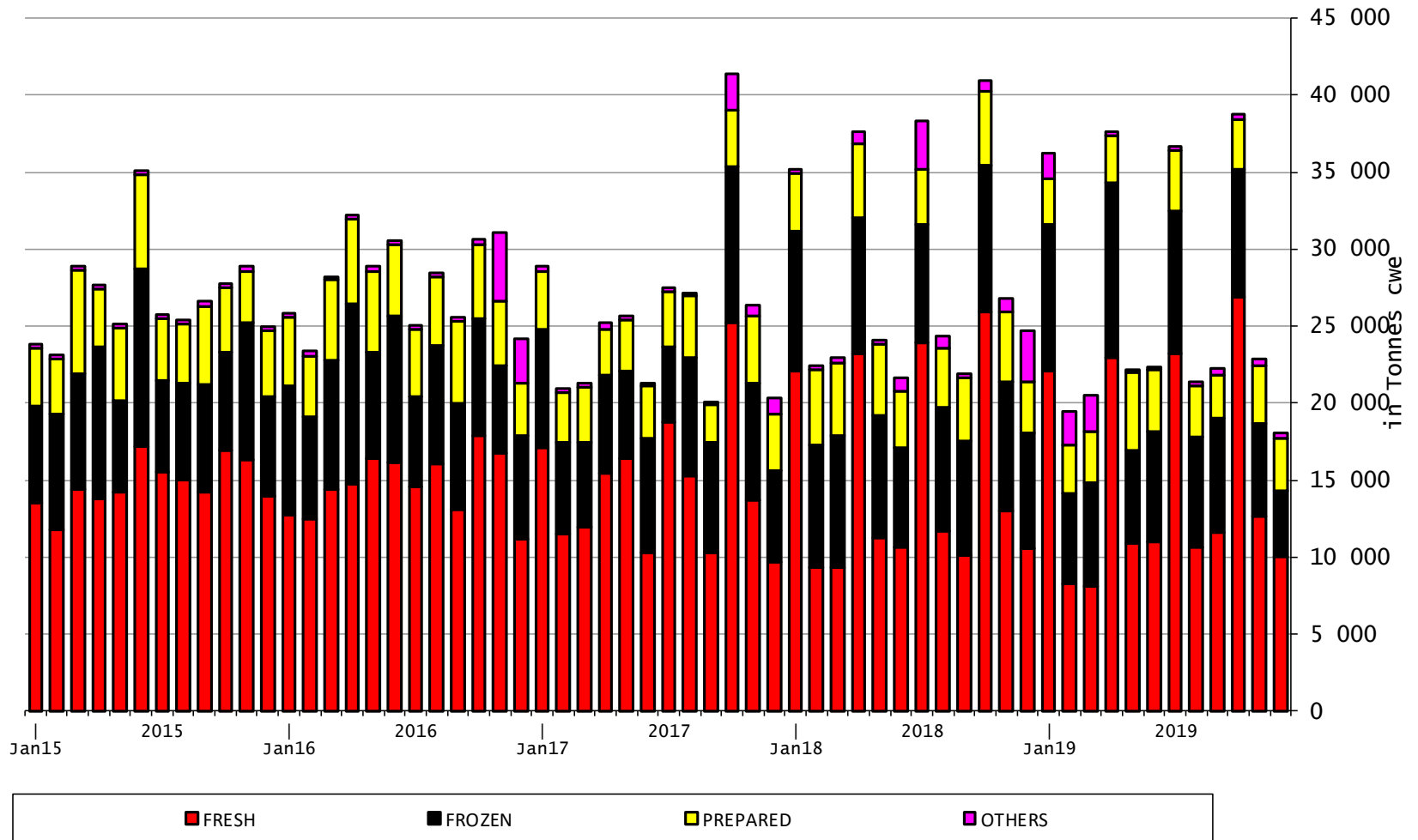


# TRADE

## EU+UK IMPORTS

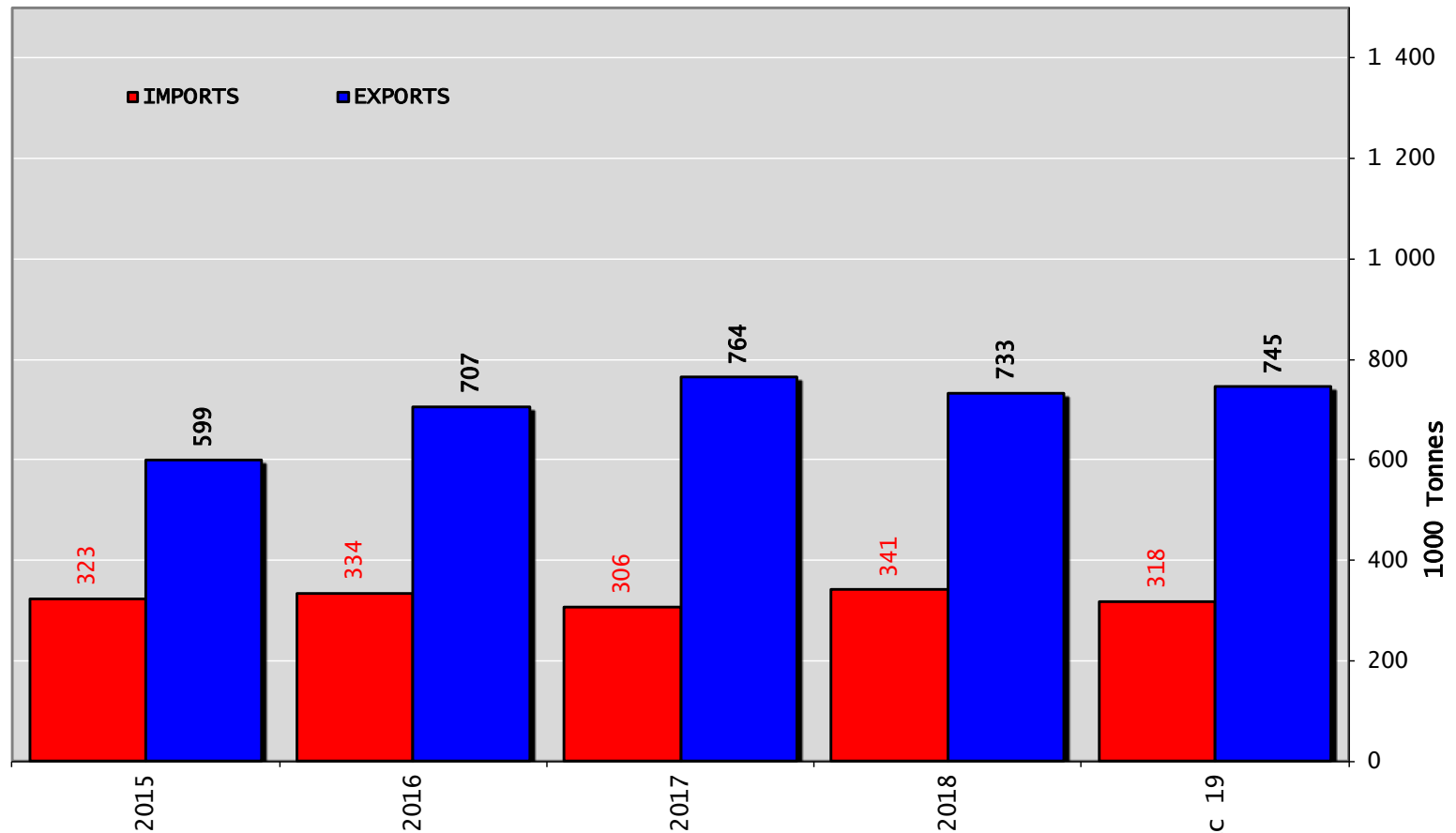
S

### EU+UK Imports of BEEF products



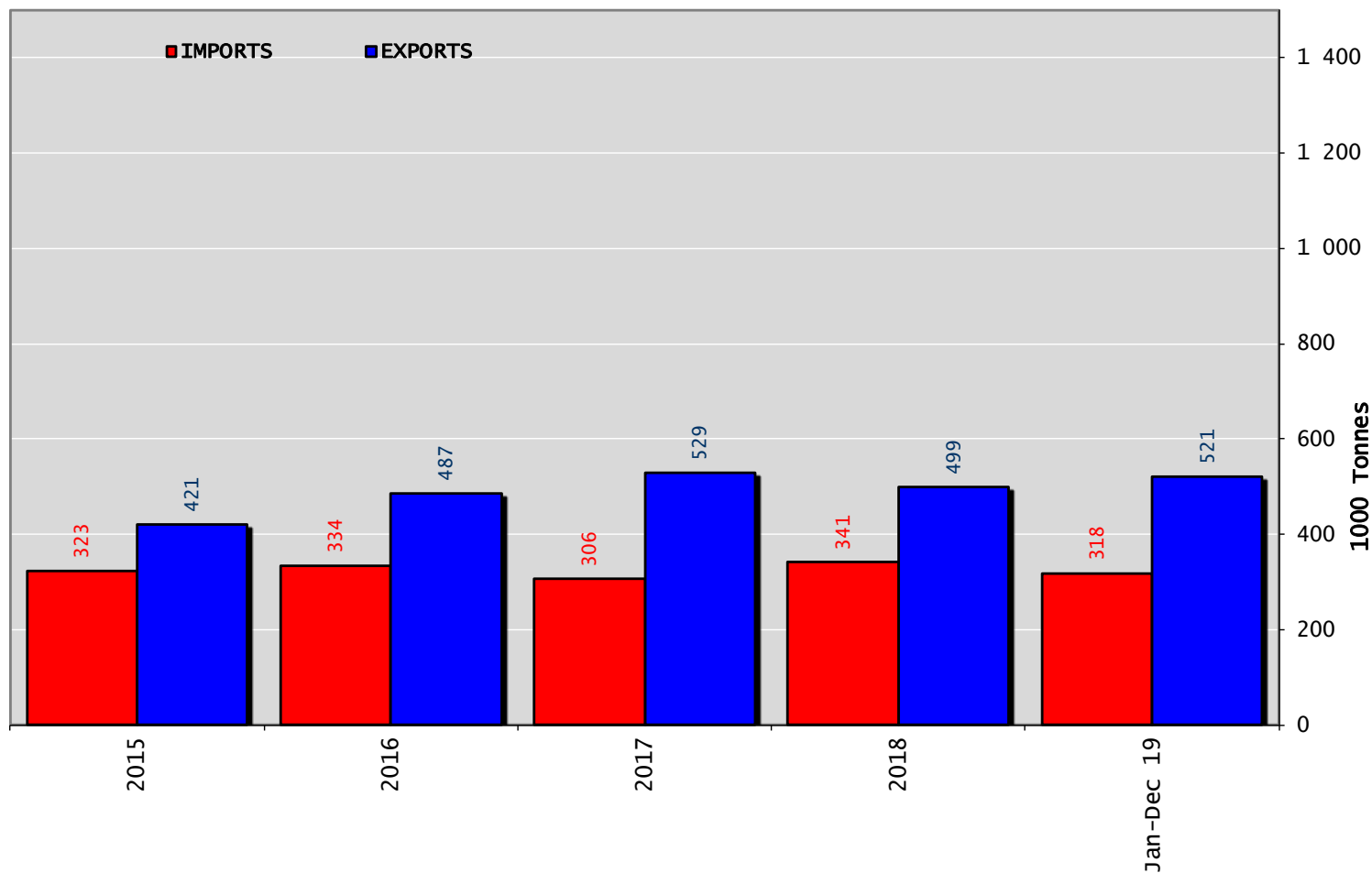
09 March 2020

### Trade Balance of Beef Products and Live Animals



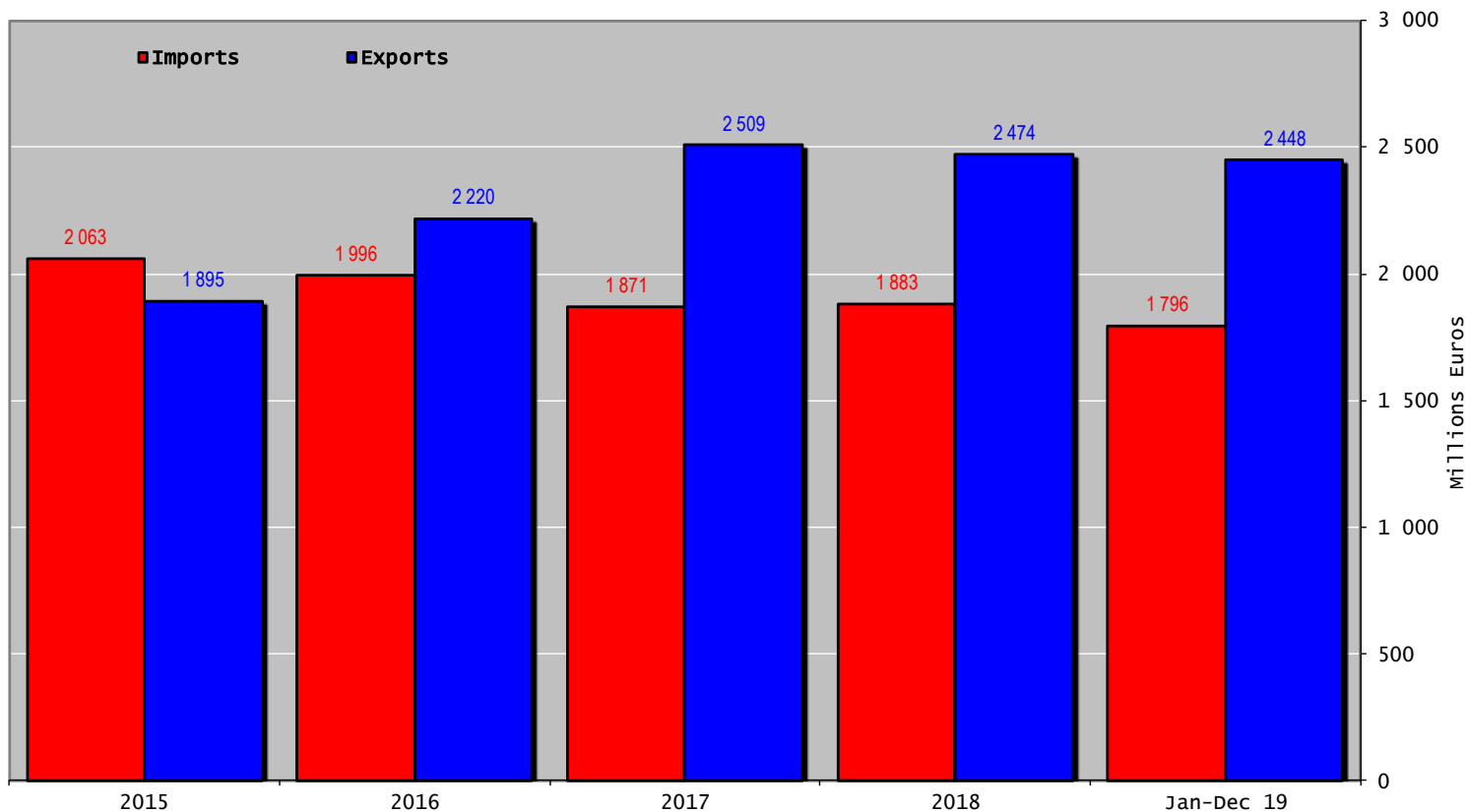
09 March 2020

## Trade Balance of Beef Products (Except Live Animals)

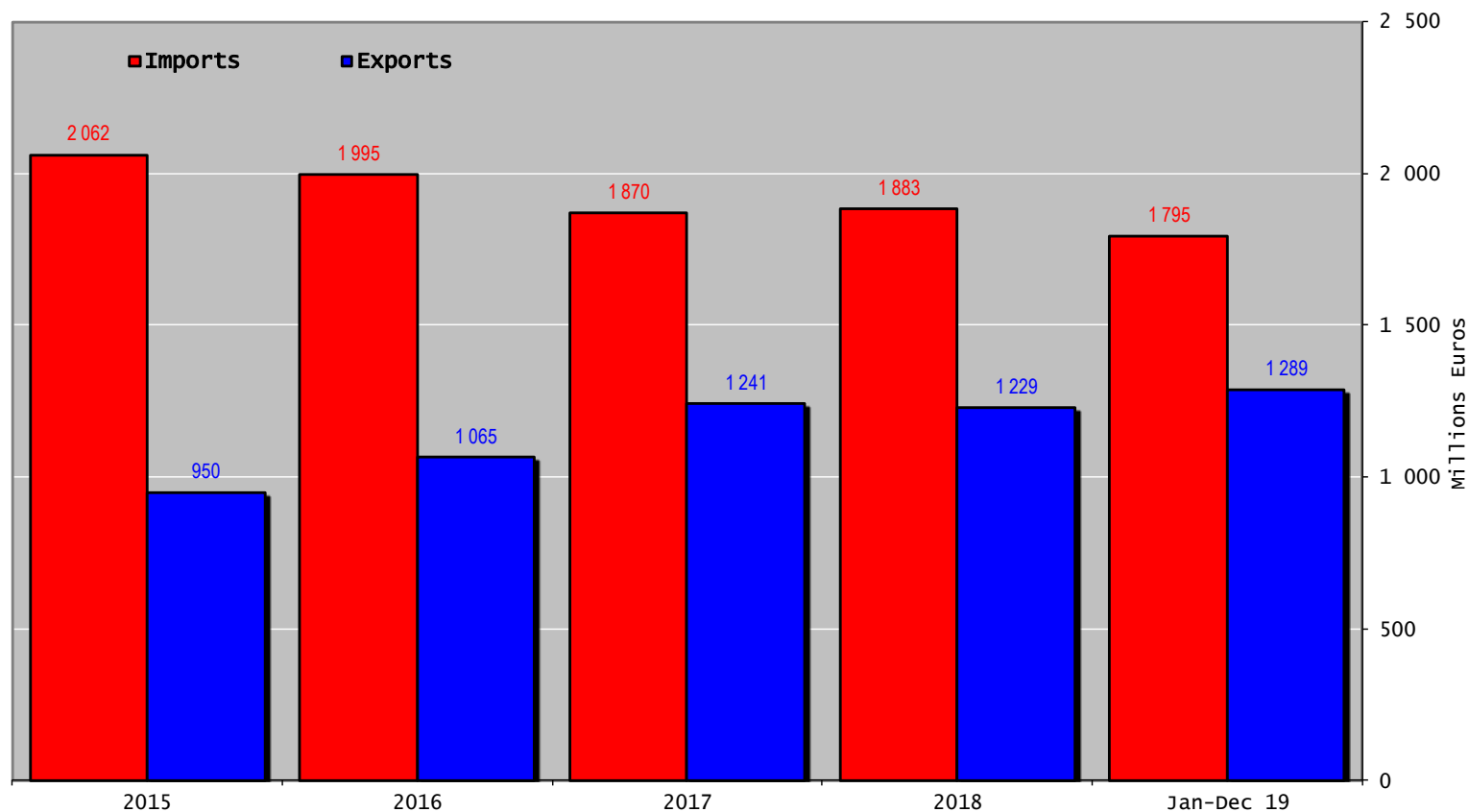


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### Trade Balance of Beef Products and Live Animals

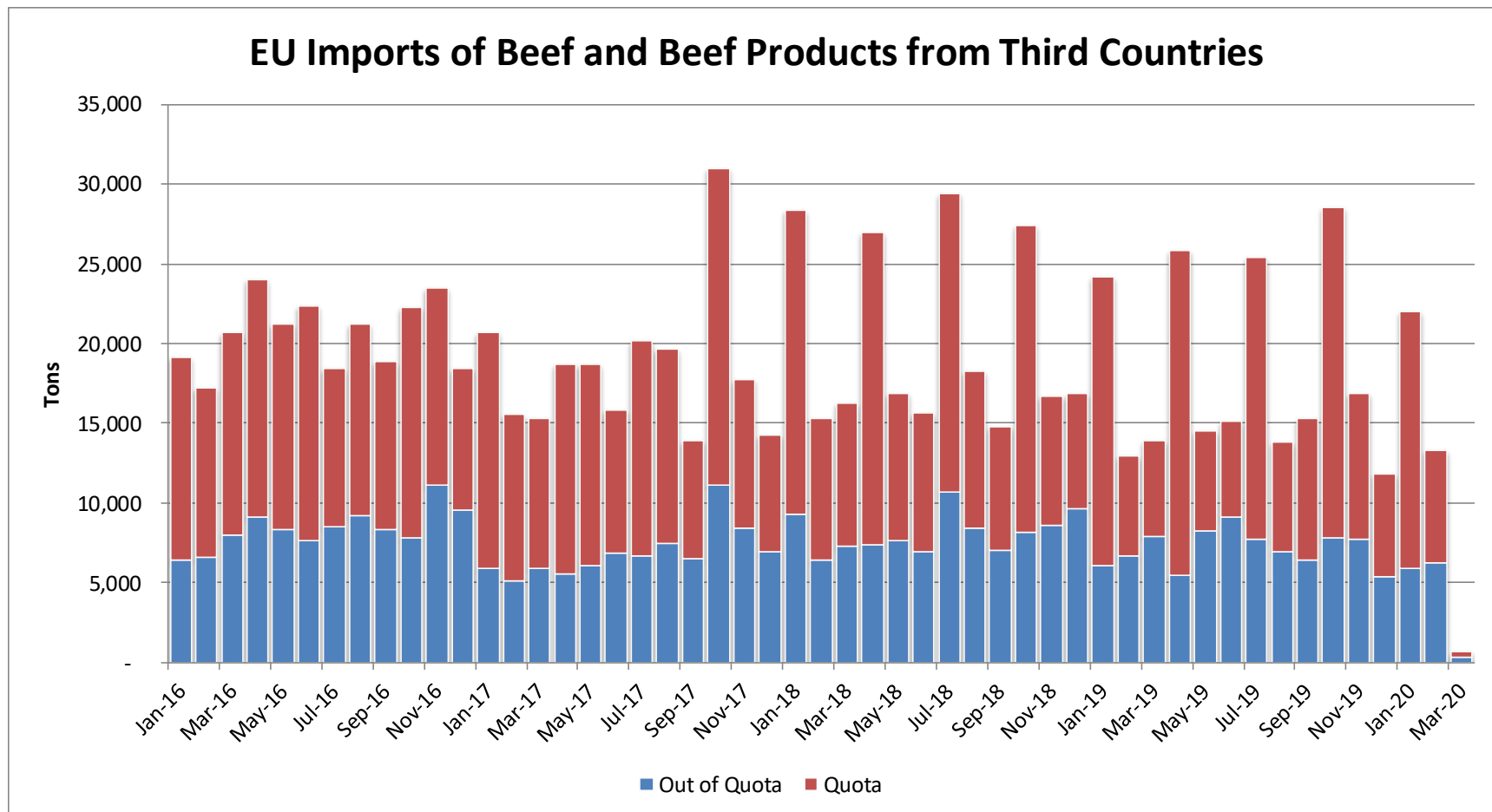


## Trade Balance of Beef Products (Except Live Animals)



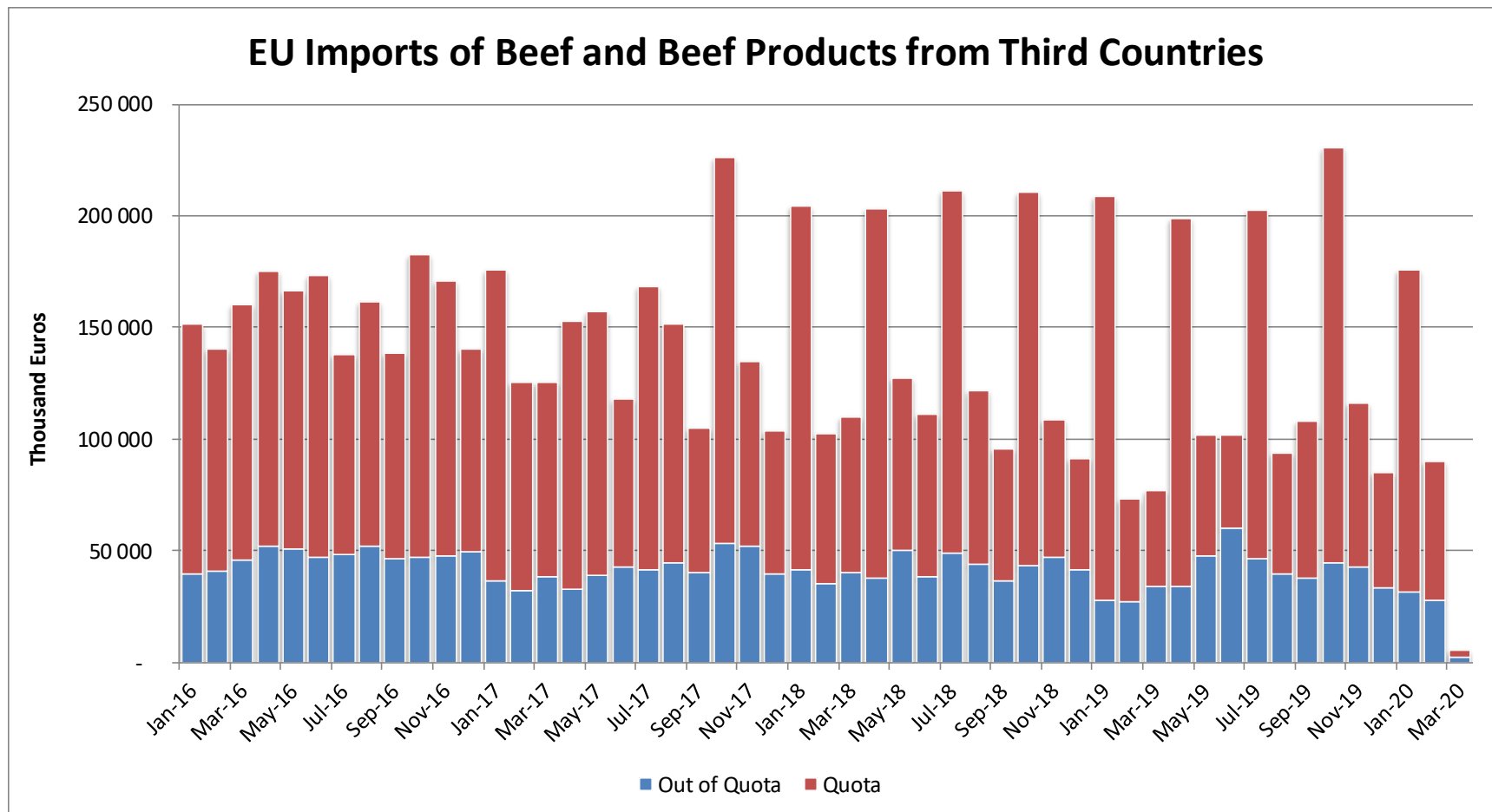
09 March 2020

# Imports in and out of TRQs



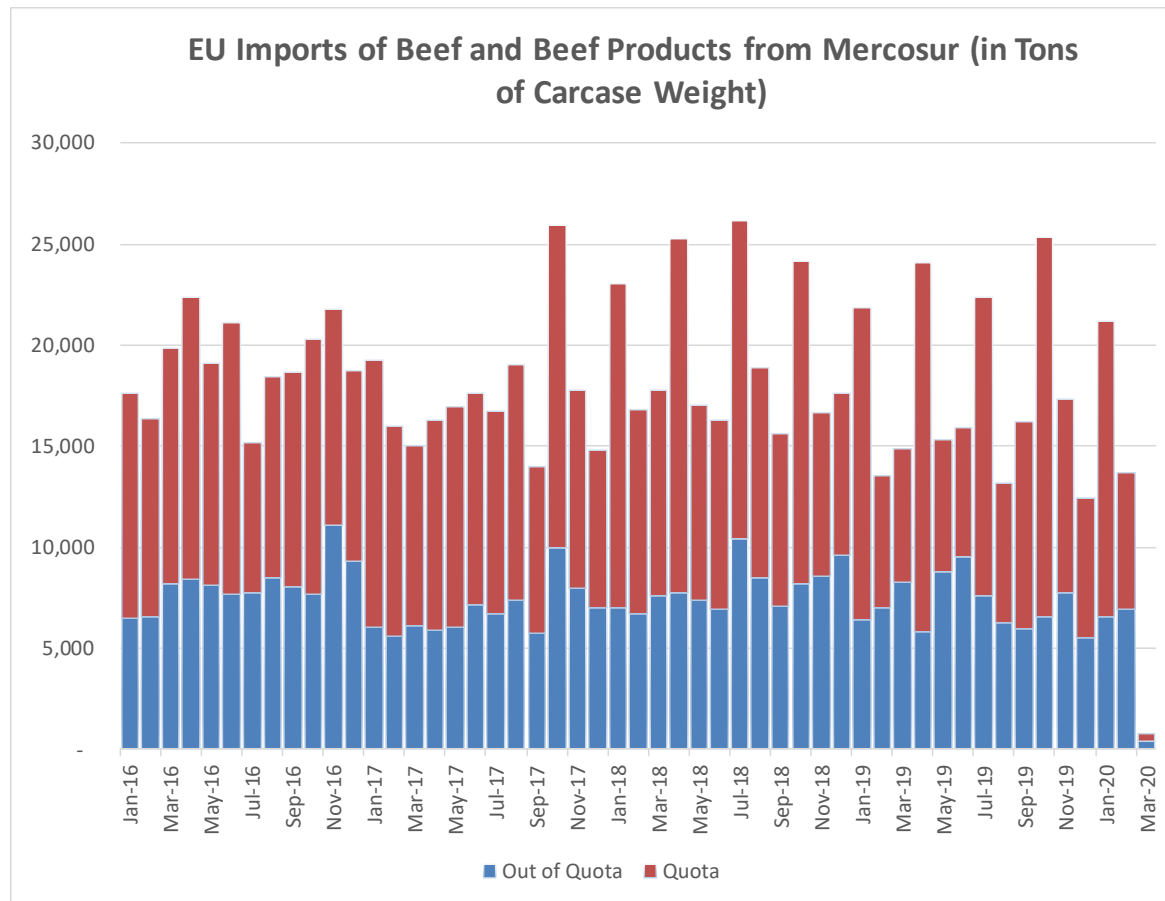
09 March 2020

# Imports in and out of TRQs



09 March 2020

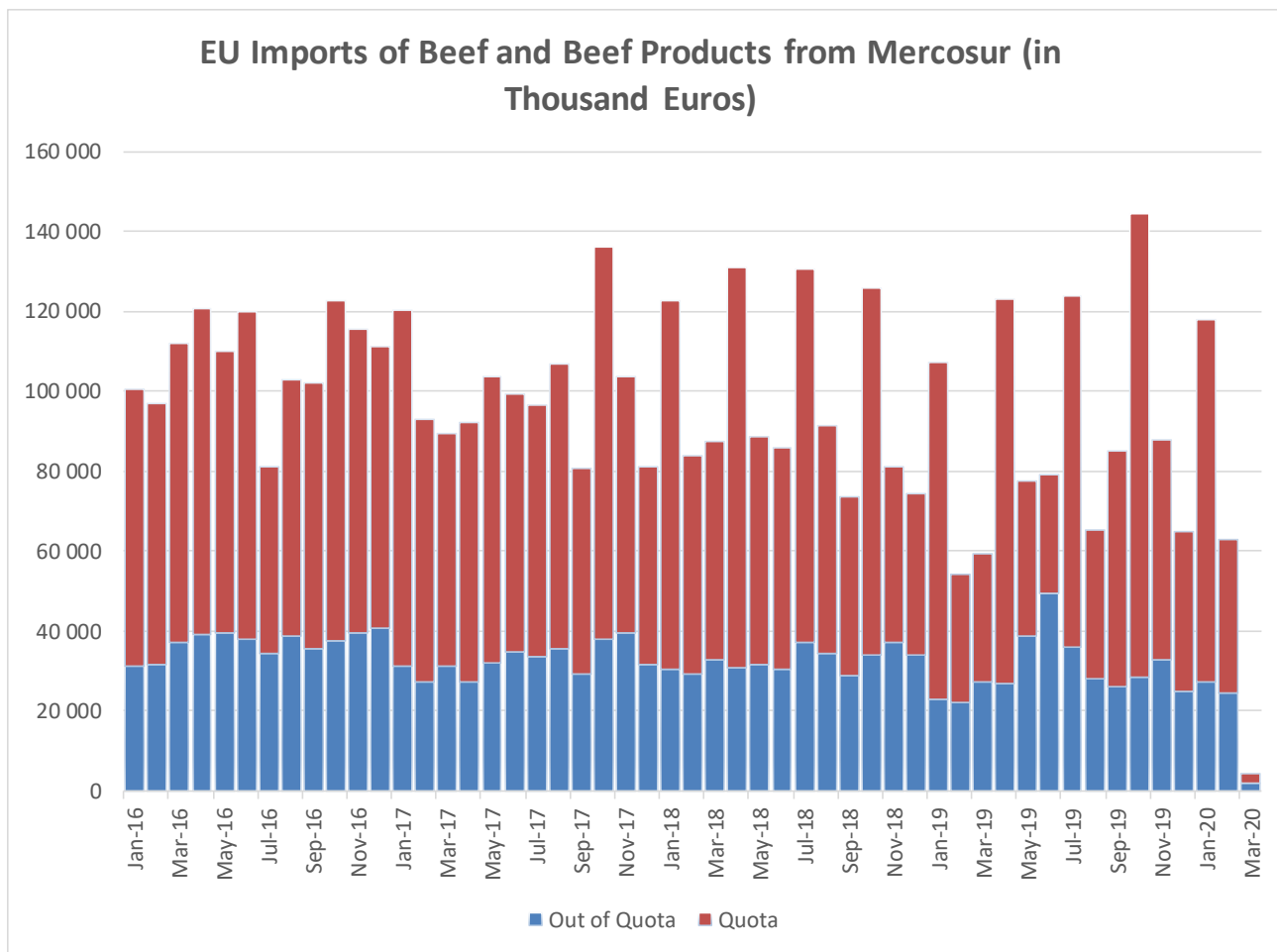
# Imports in and out of TRQs



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# Imports in and out of TRQs



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# 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%	14 334.94	48.59%
09.4451	Australia	7 150	5 333.48	74.59%	4 942.02	69.12%	2 080.44	29.10%
09.4452	Uruguay	6 376	6 363.24	99.80%	6 363.76	99.81%	2 217.37	34.78%
09.4453	Brazil	10 000	5 057.27	50.57%	4 147.19	41.47%	1 959.46	19.59%
09.4454	New Zealand	1 300	1 122.25	86.33%	980.60	75.43%	475.76	36.60%
09.4002	Canada/US	11 500	2 351.37	20.45%	3 883.04	33.77%	2 382.58	20.72%
09.4455	Paraguay	1 000	962.21	96.22%	935.41	93.54%	373.32	37.33%
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 30/11/2019

# 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%	

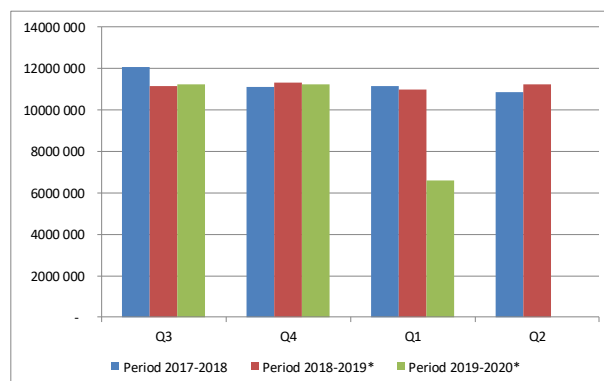
	2018-Q3	2018-Q4	2019-Q1	2019-Q2	TOTAL
Period 2018-2019*	11 164 832	11 319 134	10 972 635	11 255 802	44 712 403
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.24%	100.00%	97.53%	100.00%	99.36%

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*	11 246 417	11 239 701	6 594 253	-	29 080 371
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.97%	99.91%			64.62%

Available after transfer	11 250 000	11 250 000			
	99.97%	99.91%			

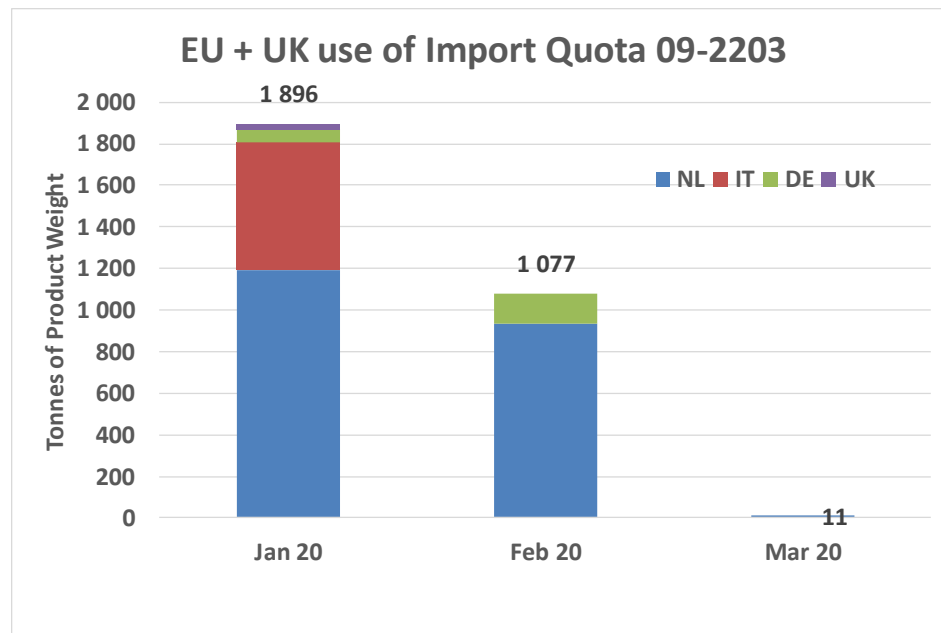
\* Until 17.02.2020



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# High Quality Beef Import Quotas

Origin	GATT 2019-2020				
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	Total
NL			1 556		1 556
IT			614		614
DE			173		173
UK			23		23
<b>Total import within Quota *</b>	<b>2 367</b>				<b>2 367</b>
Available			4 625	4 625	9 250
Use			51.18%		25.59%
After transfer			4 625		
Use			51.18%		

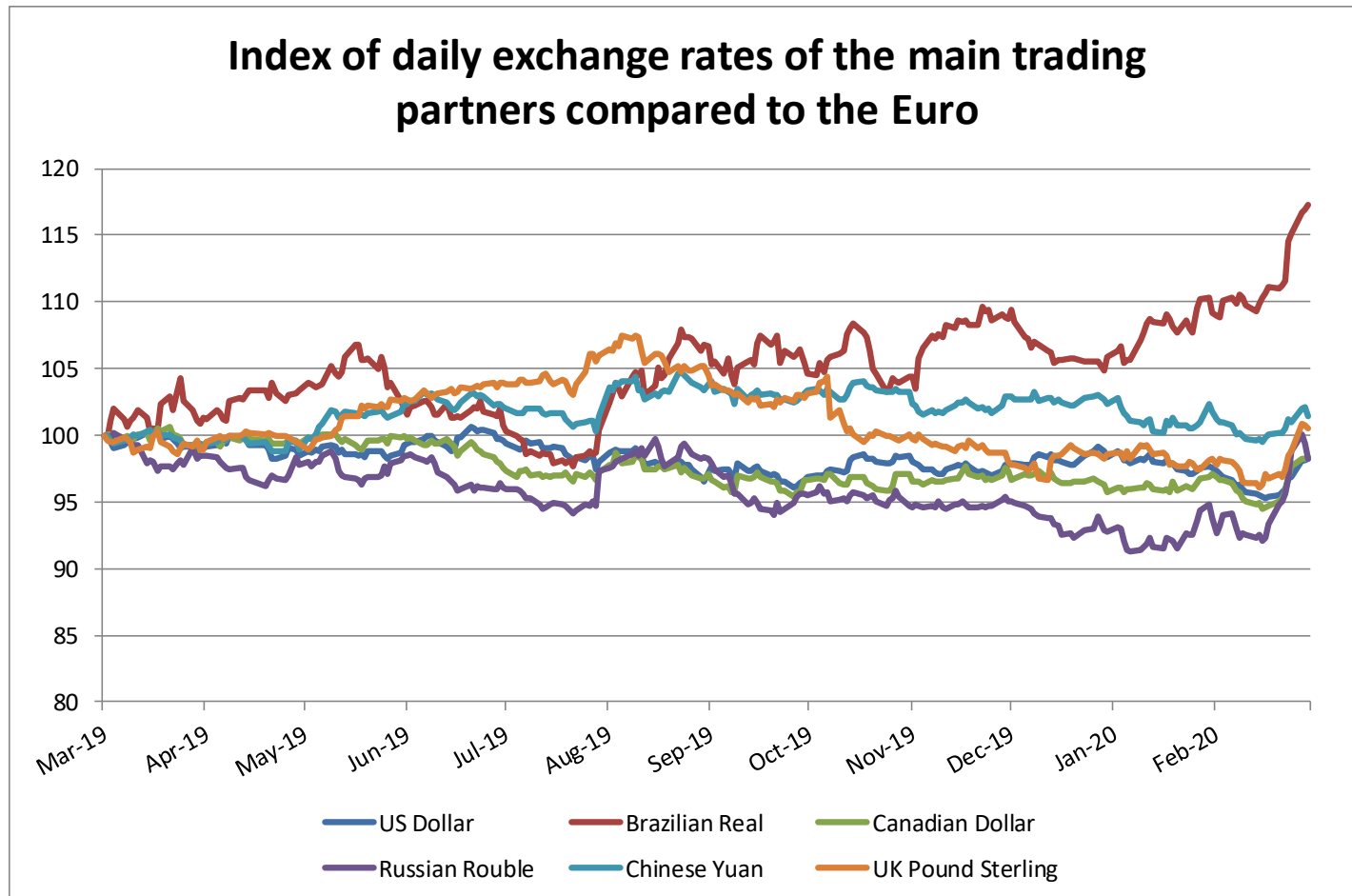


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# WORLD BEEF MARKET

EXCHANGE RATE INDEX / Euro

Main Trading Partners

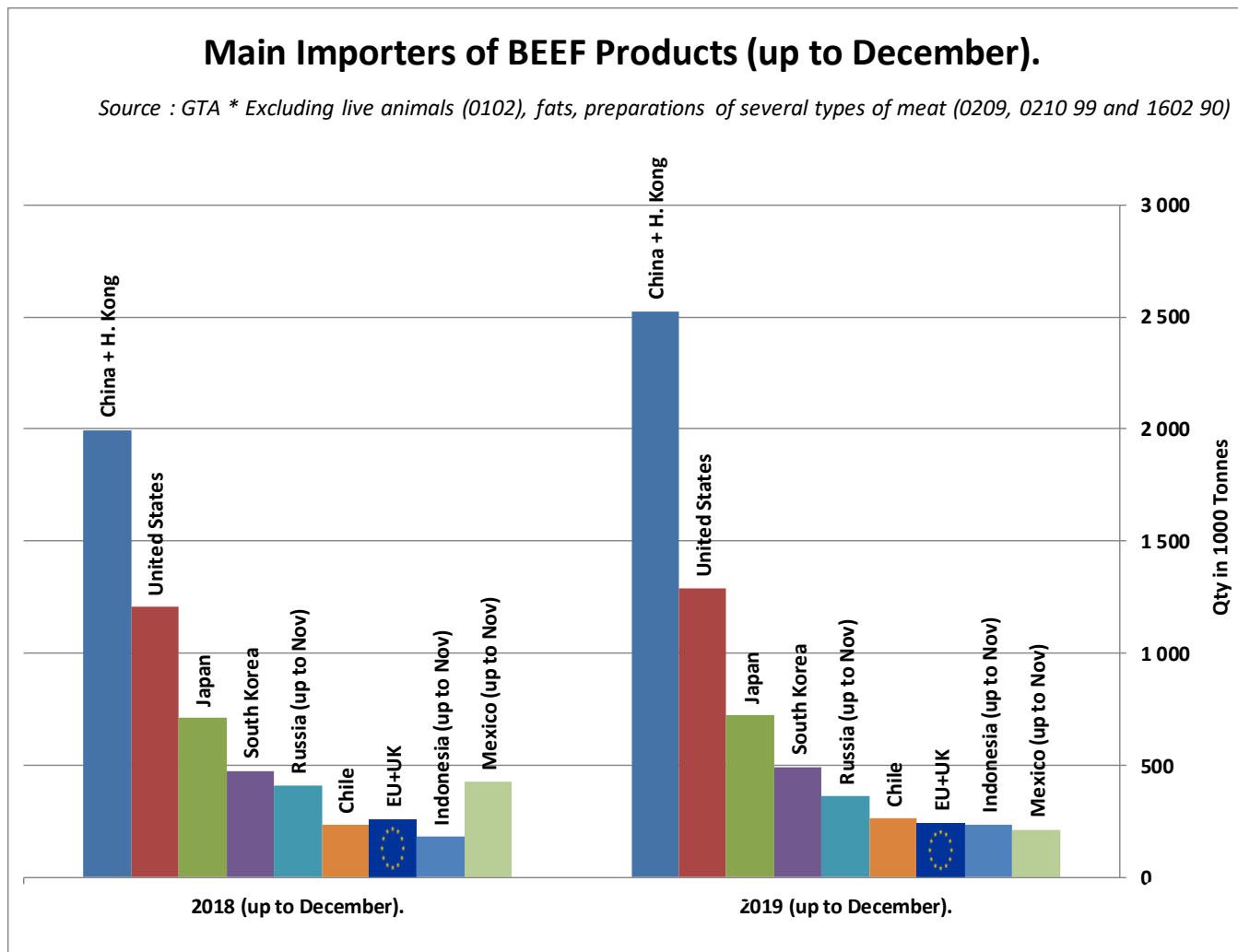


Source : ECB

09 March 2020

# WORLD BEEF MARKET

## E.U. + UK IMPORTS BEEF MAIN IMPORTERS



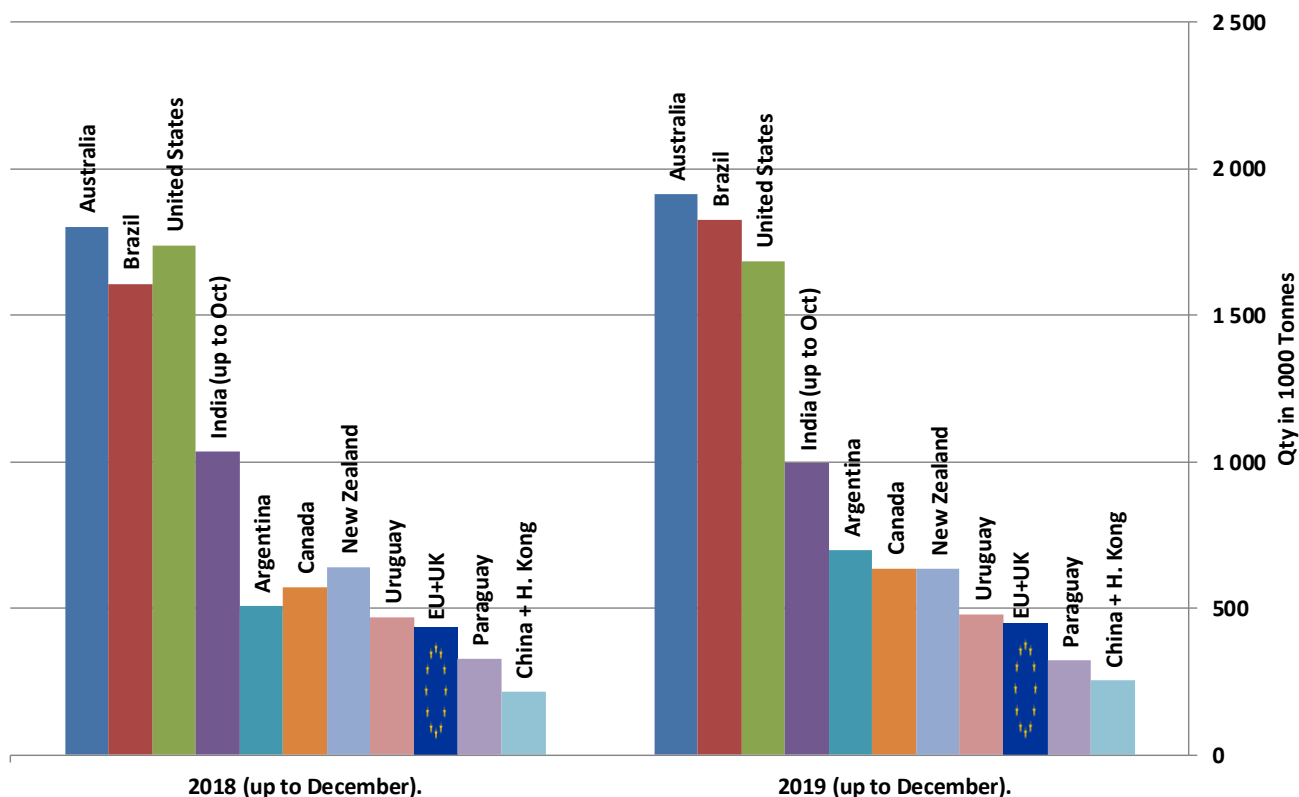
09 March 2020

# WORLD BEEF MARKET

## E.U. + UK EXPORTS BEEF MAIN EXPORTERS

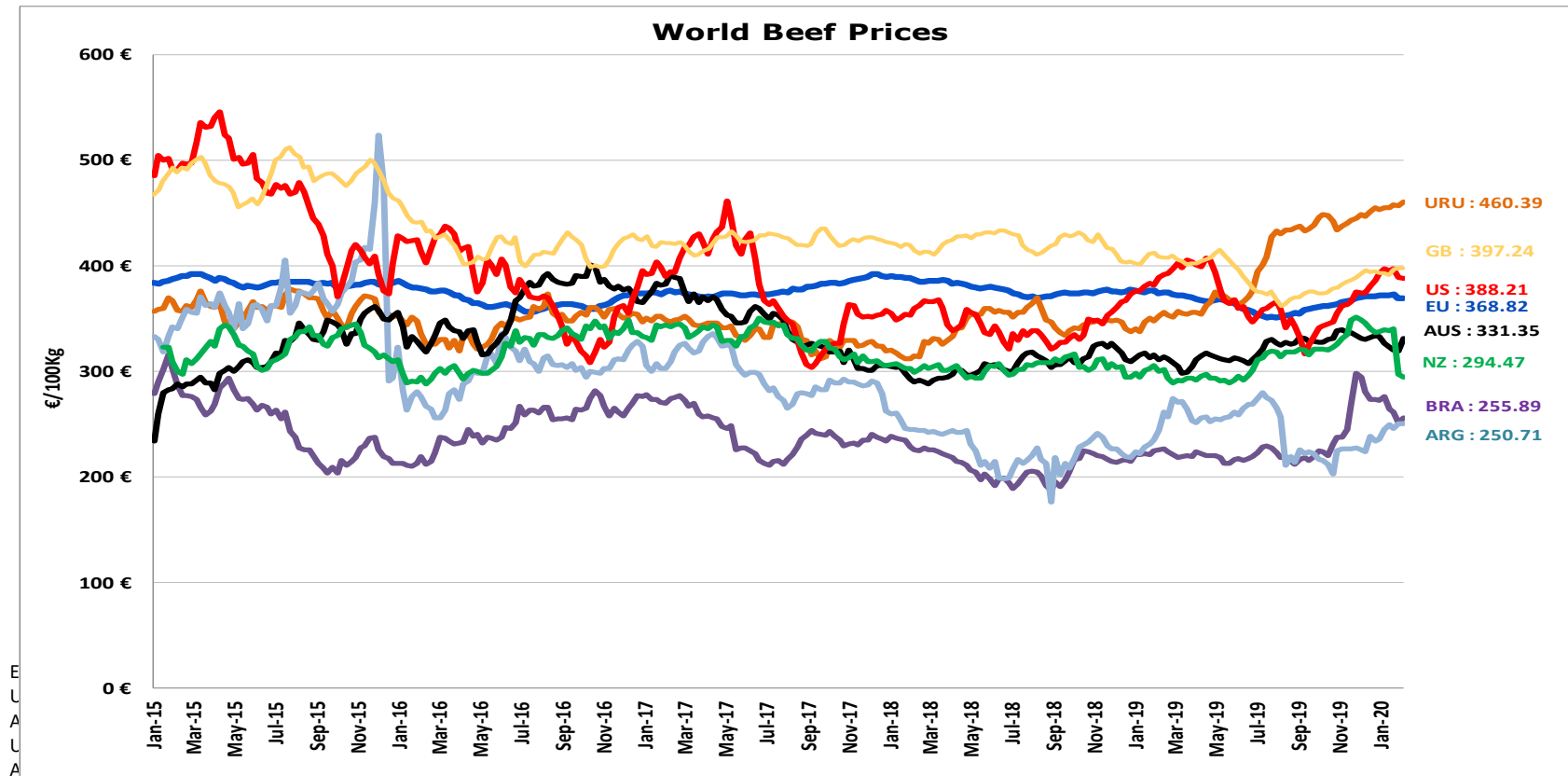
### Main Exporters of BEEF Products (up to December).

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



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)

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*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/>*