



# BEEF & VEAL MARKET SITUATION



Meat Market Observatory - 26 October 2022

## LIVESTOCK

JUNE SURVEY

EU EVOLUTION  
TOTAL BOVINE

May/Jun 1000 Hd	TOT LIVESTOCK				%Var 2022 2021	BOVINE < 1 Year				%Var 2022 2021	BOVINE 1-2 Year				%Var 2022 2021	BOVINE > 2 Year				%Var 2022 2021
	2019	2020	2021	2022		2019	2020	2021	2022		2019	2020	2021	2022		2019	2020	2021	2022	
BE	2 406	2 388	2 353	2 241	-4.8%	706	716	712	656	-7.8%	475	471	473	463	-2.0%	1 226	1 201	1 169	1 121	-4.1%
BG																				
CZ																				
DK	1 512	1 517	1 503	1 484	-1.3%	510	517	517	510	-1.4%	292	291	287	290	+1.0%	710	709	699	684	-2.1%
DE	11 763	11 423	11 176	10 986	-1.7%	3 502	3 410	3 398	3 296	-3.0%	2 788	2 683	2 591	2 620	+1.1%	5 473	5 330	5 188	5 071	-2.3%
EE																				
IE	7 209	7 314	7 359	7 396	+0.5%	2 008	2 117	2 146	2 134	-0.5%	1 861	1 807	1 910	1 949	+2.0%	3 340	3 390	3 303	3 313	+0.3%
EL																				
ES	6 722	6 715	6 923	6 740	-2.6%	2 507	2 488	2 634	2 552	-3.1%	978	930	973	907	-6.8%	3 237	3 297	3 316	3 281	-1.1%
FR	18 470	18 200	17 863	17 416	-2.5%	5 227	5 144	5 134	4 949	-3.6%	3 229	3 249	3 158	3 144	-0.4%	10 014	9 808	9 571	9 323	-2.6%
HR																				
IT	6 016	6 116	6 174	6 087	-1.4%	1 746	1 746	1 762	1 725	-2.1%	1 409	1 458	1 476	1 475	-0.1%	2 861	2 912	2 936	2 887	-1.7%
CY																				
LV																				
LT																				
LU																				
HU																				
MT																				
NL	3 750	3 766	3 732	3 766	+0.9%	1 536	1 558	1 523	1 546	+1.5%	460	446	479	493	+2.9%	1 754	1 762	1 729	1 726	-0.2%
AT	1 873	1 844	1 846	1 842	-0.2%	596	588	596	592	-0.6%	425	416	413	422	+2.2%	853	841	838	828	-1.1%
PL	6 358	6 344	6 401	6 444	+0.7%	1 771	1 729	1 789	1 916	+7.1%	1 768	1 796	1 856	1 674	-9.8%	2 820	2 819	2 756	2 855	+3.6%
PT	1 712	1 751	1 723	1 680	-2.5%	524	557	550	554	+0.8%	267	264	252	229	-9.2%	921	929	922	897	-2.7%
RO	1 963	1 915	1 864	1 852	-0.6%	428	418	386	379	-1.9%	230	217	207	220	+6.2%	1 305	1 280	1 271	1 254	-1.4%
SI																				
SK																				
FI																				
SE	1 466	1 453	1 453	1 448	-0.3%	451	462	465	458	-1.6%	380	362	369	374	+1.3%	636	629	619	617	-0.2%
EU	71 220	70 747	70 371	69 383	-1.4%	21 512	21 451	21 612	21 268	-1.6%	14 559	14 389	14 444	14 260	-1.3%	35 149	34 907	34 315	33 856	-1.3%
UK	9 739	9 615				2 857	2 878				2 448	2 412				4 434	4 324			

Source : EStat Newcronos

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

European  
Commission

## LIVESTOCK

JUNE SURVEY

EU EVOLUTION  
TOTAL BOVINE

May/Jun 1000 Hd	TOTAL COWS				%Var 2022 2021	DAIRY COWS				%Var 2022 2021	OTHER COWS				%Var 2022 2021
	2019	2020	2021	2022		2019	2020	2021	2022		2019	2020	2021	2022	
BE	960	954	937	902	-3.7%	536	544	539	527	-2.2%	425	409	399	375	-5.8%
BG															
CZ															
DK	654	653	647	634	-2.0%	567	567	565	557	-1.4%	87	86	82	77	-6.1%
DE	4 720	4 609	4 517	4 430	-1.9%	4 067	3 969	3 892	3 817	-1.9%	653	640	626	612	-2.1%
EE															
IE	2 505	2 551	2 545	2 541	-0.2%	1 505	1 568	1 605	1 627	+1.4%	1 000	983	940	913	-2.9%
EL															
ES	2 854	2 927	2 987	2 948	-1.3%	815	810	828	892	+7.7%	2 039	2 117	2 159	2 056	-4.8%
FR	7 546	7 442	7 315	7 159	-2.1%	3 471	3 403	3 331	3 266	-1.9%	4 075	4 039	3 984	3 893	-2.3%
HR															
IT	2 110	2 130	2 161	2 130	-1.4%	1 840	1 844	1 852	1 821	-1.7%	270	286	309	309	+0.2%
CY															
LV															
LT															
LU															
HU															
MT															
NL	1 641	1 651	1 627	1 623	-0.2%	1 578	1 593	1 571	1 571	-0.0%	63	58	56	53	-5.6%
AT	726	716	715	710	-0.7%	525	523	531	549	+3.4%	201	193	184	161	-12.5%
PL	2 461	2 468	2 388	2 208	-7.6%	2 221	2 218	2 113	1 852	-12.4%	240	250	276	356	+28.9%
PT	742	757	757	742	-2.0%	238	239	236	227	-3.8%	504	517	521	515	-1.2%
RO	1 179	1 160	1 148	1 135	-1.2%	1 162	1 145	1 133	1 119	-1.3%	17	15	15	16	+7.3%
SI															
SK															
FI															
SE	516	510	512	510	-0.4%	306	303	302	297	-1.8%	210	207	210	213	+1.6%
EU	28 612	28 528	28 256	27 671	-2.1%	18 831	18 727	18 497	18 121	-2.0%	9 782	9 801	9 760	9 549	-2.2%
UK	3 398	3 359				1 871	1 850				1 527	1 509			

Under revision

Source : EStat Newcronos

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

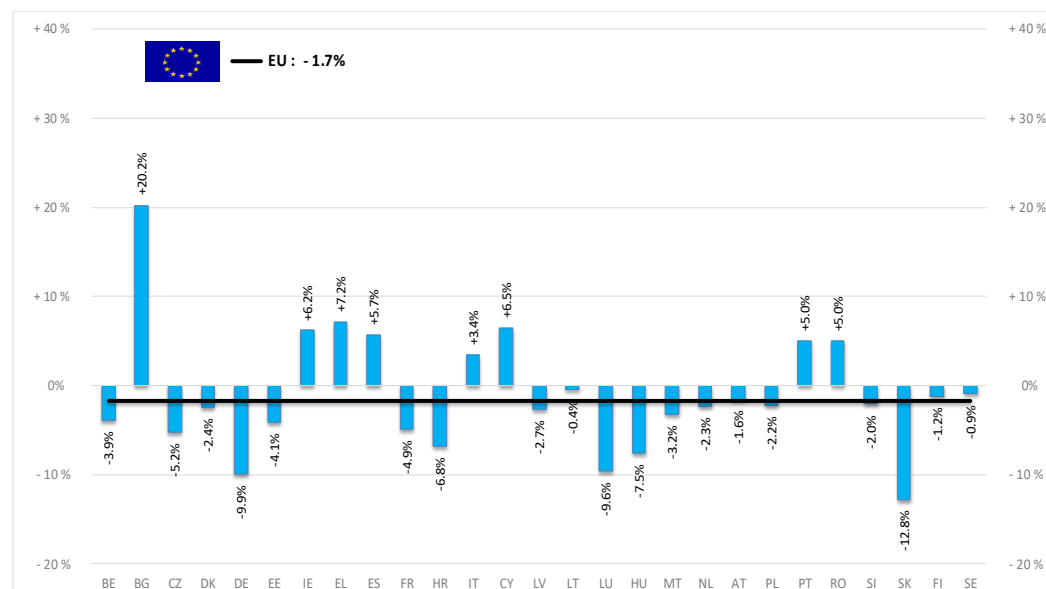
European  
Commission

# PRODUCTION % EVOLUTION

HEADS	Jan-Jul 22/21	TONNES	Jan-Jul 22/21
	EU		EU
Bull	-3.9%	Bull	-3.5%
Bullock	+3.9%	Bullock	+2.6%
Cow	-0.4%	Cow	-1.7%
Heifer	+1.7%	Heifer	+0.7%
Calve	-0.2%	Calve	-1.4%
Young cattle	-1.8%	Young cattle	-2.4%
Meat of bovine animals	-0.9%	Meat of bovine animals	-1.7%

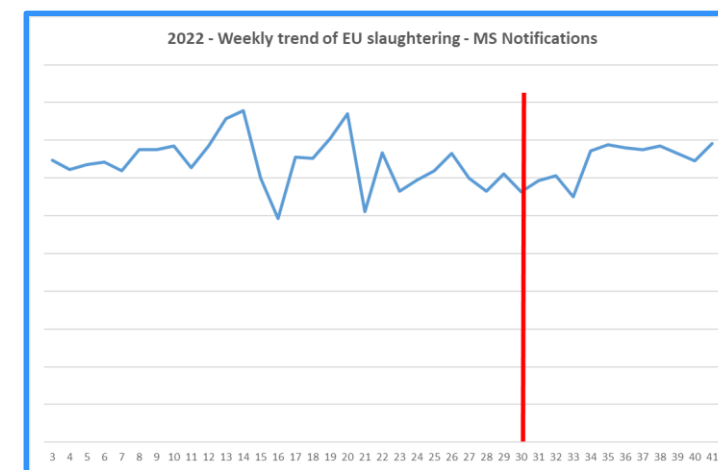
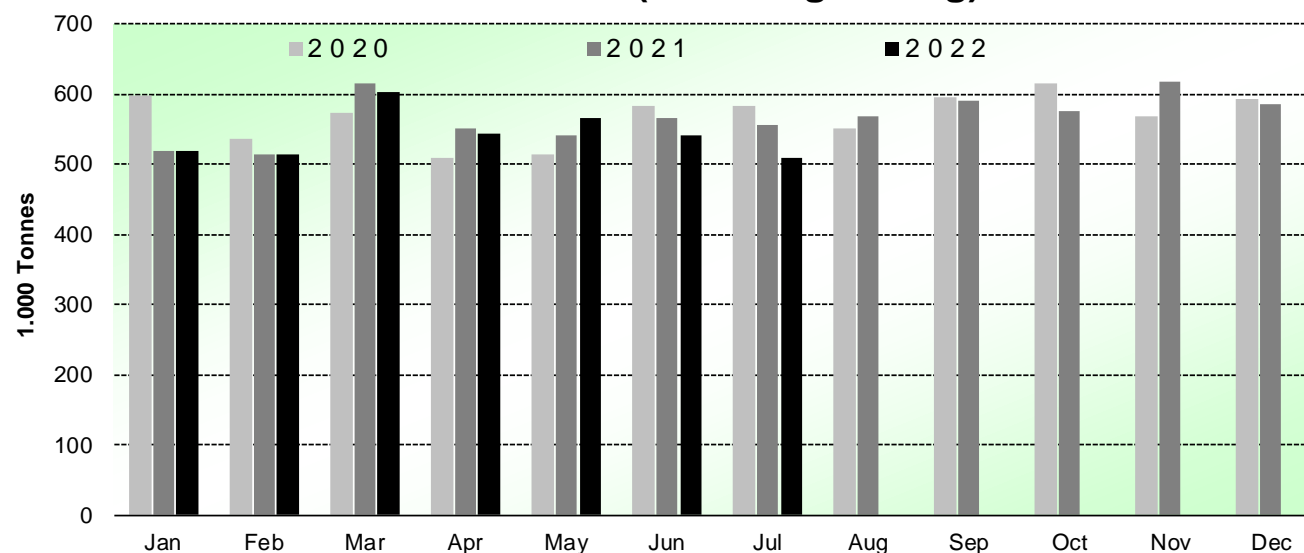
Estimates for last month of period : EL

Estimates for last month of period : EL



Source : EStat - Newcronos

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



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



European Commission

# PRICES CARCASSES

EU Prices week		40	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	493.4	+ 0.1%	+ 0.3%	+ 22.0%
	Young Bovines (Z)	493.7	+ 0.3%	+ 0.8%	+ 24.6%
	Young Bulls (A)	495.1	+ 0.1%	+ 0.7%	+ 22.7%
	Steers (C)	483.4	- 0.8%	- 2.4%	+ 15.7%
	Cows (D)	432.5	- 1.1%	- 1.8%	+ 28.6%
	Heifers (E)	509.2	+ 0.2%	+ 0.2%	+ 22.2%
	Calves slaughtered <8M	627.9	+ 2.2%	+ 4.6%	+ 17.1%
Live Animals	Male Calves Dairy Type	84.95	- 15.4%	- 19.0%	+ 2.4%
	Male Calves Beef Type	225.8	- 1.8%	- 1.3%	+ 4.7%
	Young Store Cattle	3.12	+ 0.7%	+ 0.2%	+ 15.4%
	Yearling Male Store Cattle	3.32	- 2.8%	- 4.5%	- 0.0%
	Yearling Female Store Cattle	2.76	- 1.0%	- 2.5%	+ 7.8%

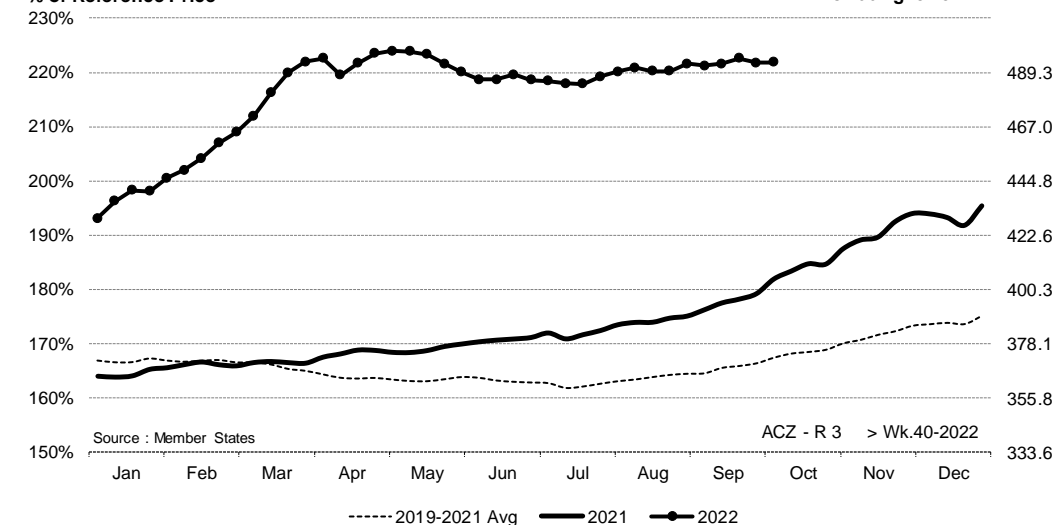
Sources : MSs notifications (Regulation (EU) 1182/2017 and 1184/2017)

## EVOLUTION A/C/Z.R3

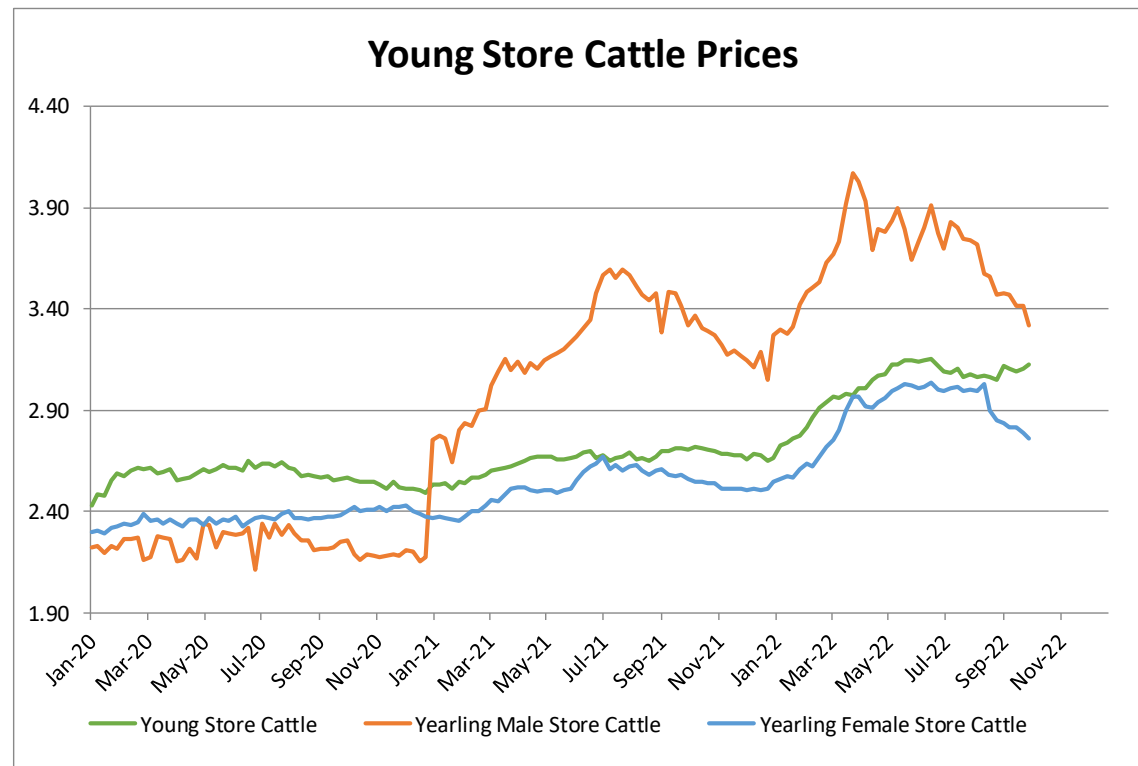
ACZ - R 3 > Wk.40-2022

% of Reference Price

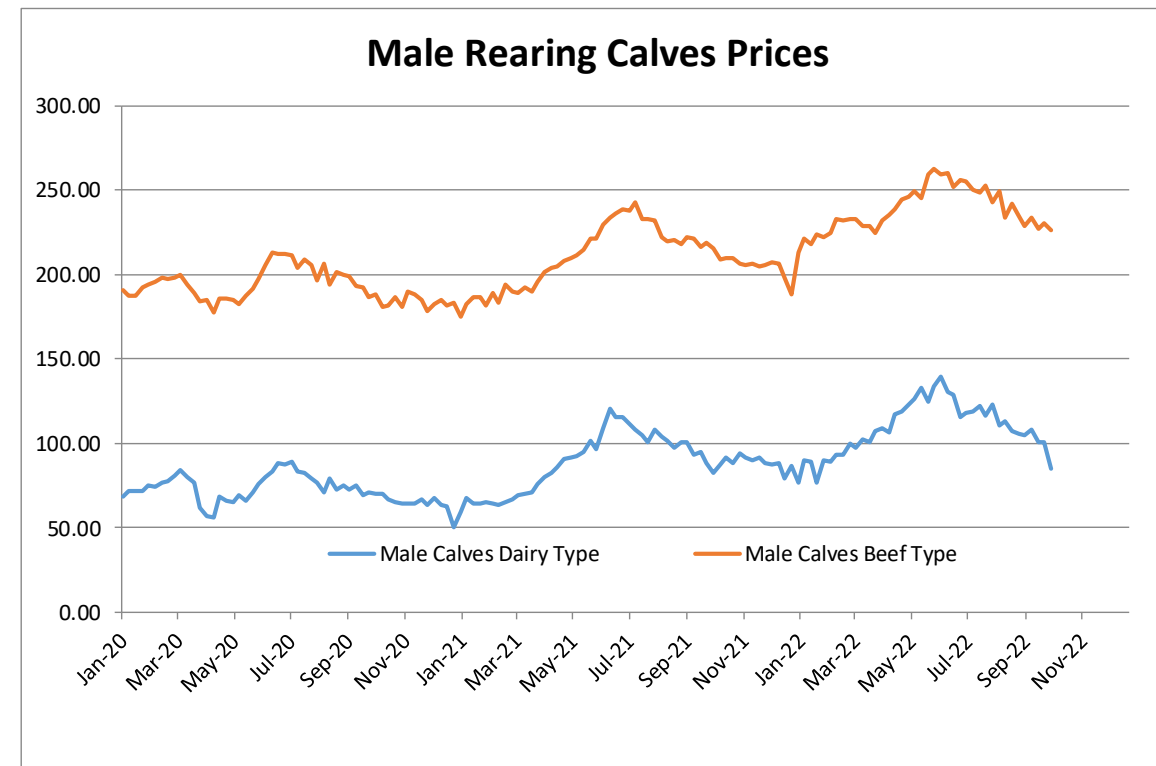
€/100 kg cwe



# PRICES LIVE ANIMALS



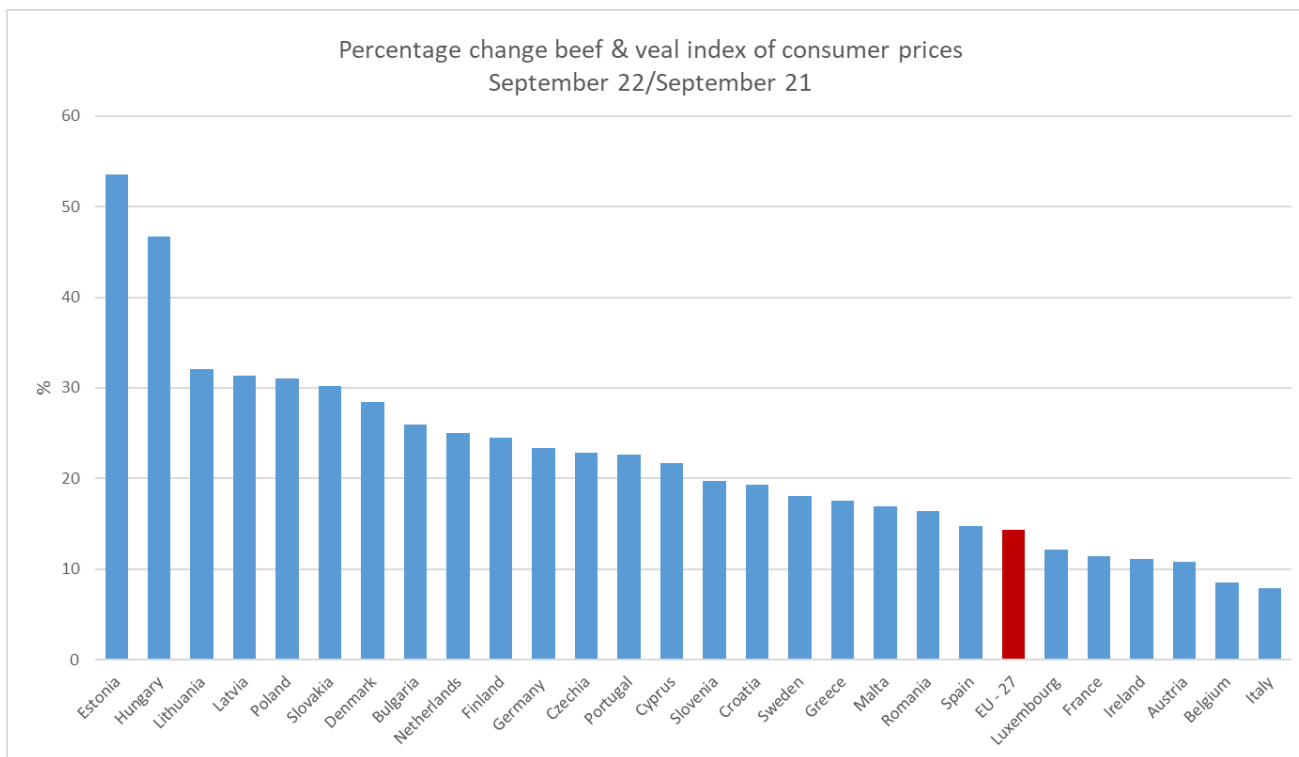
Young Store Cattle Price in	Week 40	3.12	Yearling Male Store Cattle Price	3.32
	Change y/y	+15.4%	Change y/y	-0.0%
Yearling Female Store Cattle Price		2.76		
	Change y/y	+7.8%		



Male Rearing Calves Beef type			Male Rearing Calves Dairy type		
Price in	Week 40	225.89	Price in	Week 40	84.95
	Change y/y	+4.7%		Change y/y	+2.4%

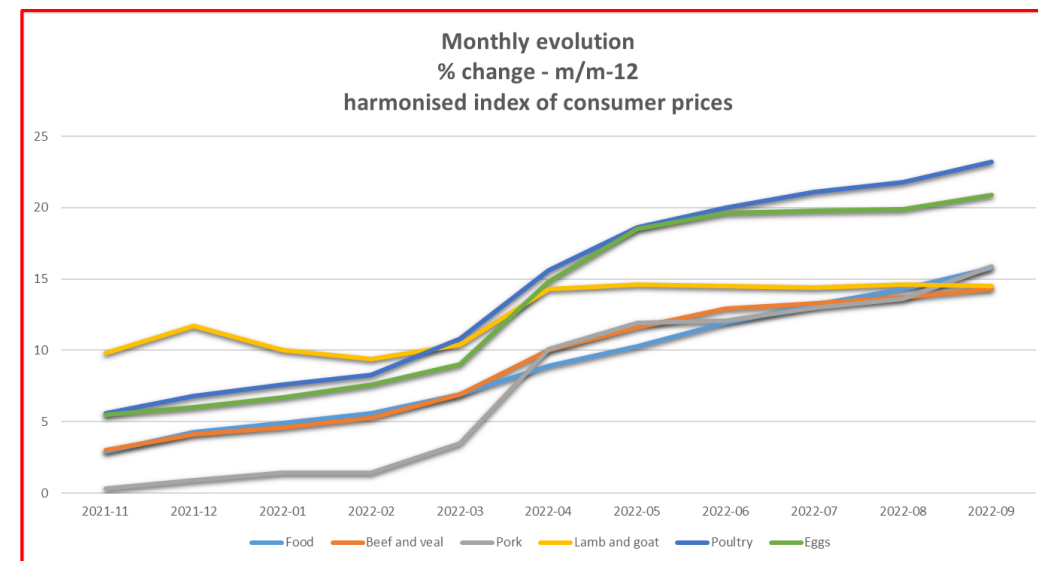
# HARMONISED INDEX OF CONSUMERS PRICES

Percentage change beef & veal index of consumer prices  
September 22/September 21

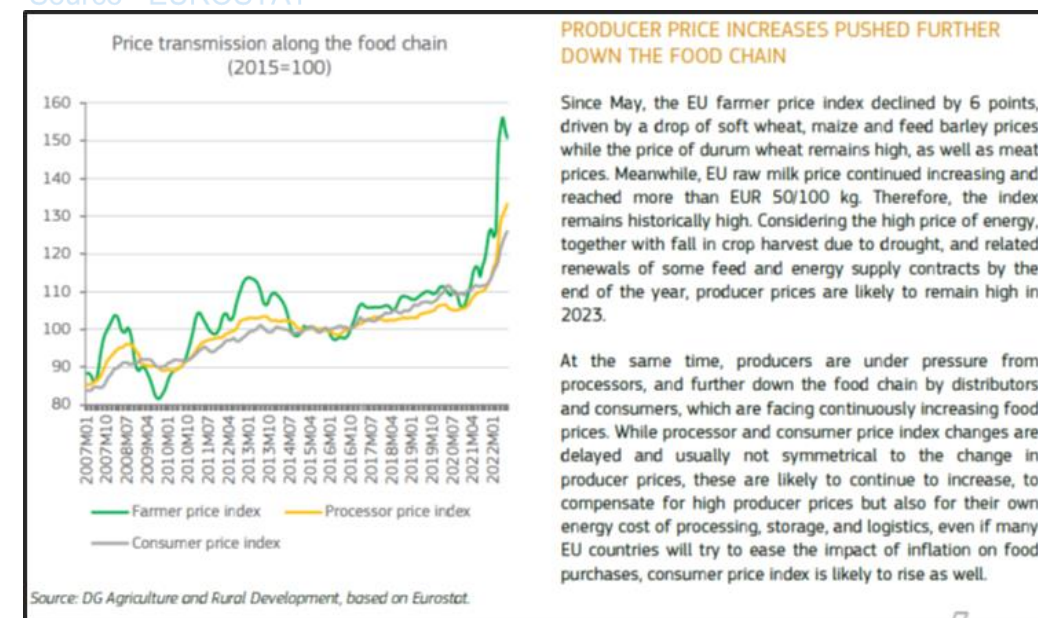


Source - EUROSTAT

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

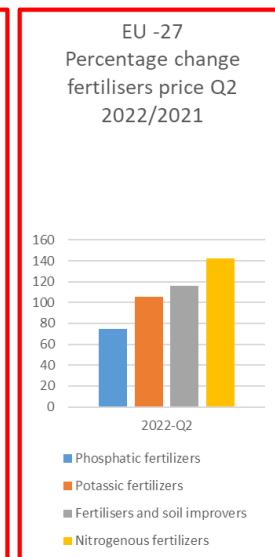
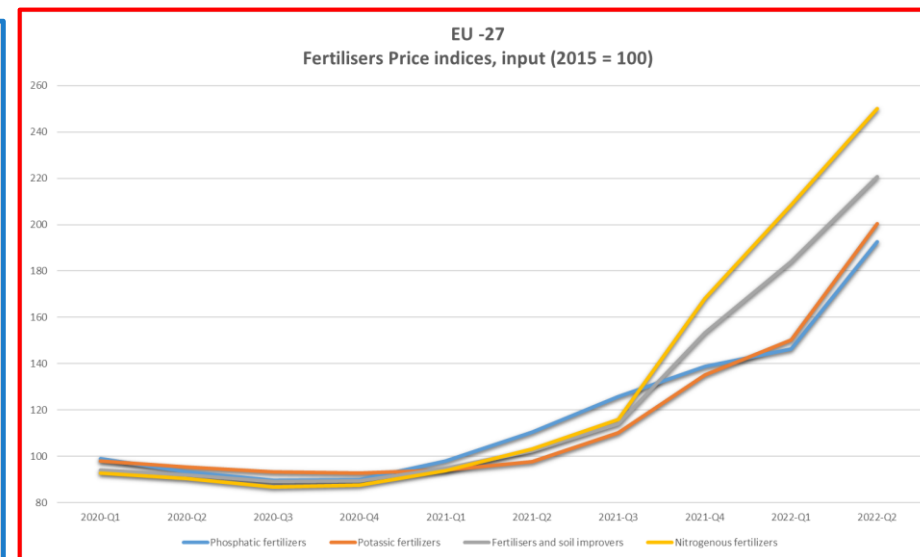
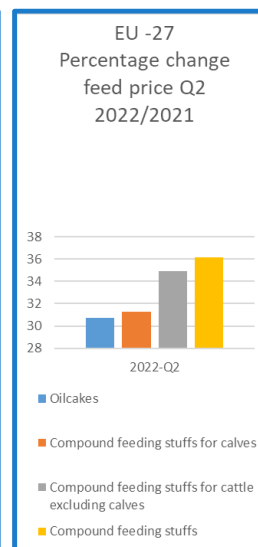
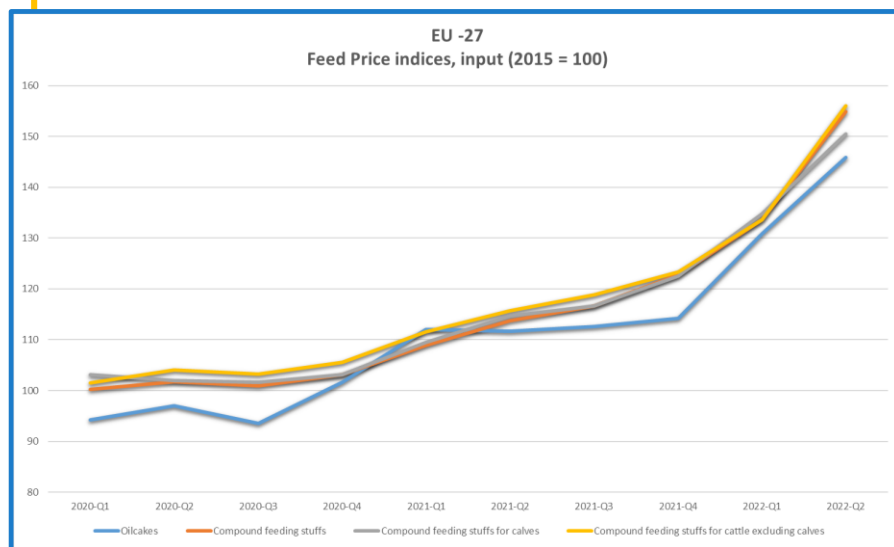


Source - EUROSTAT

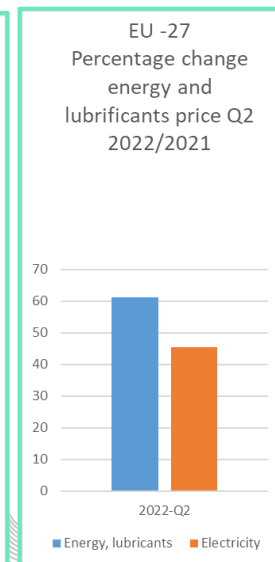
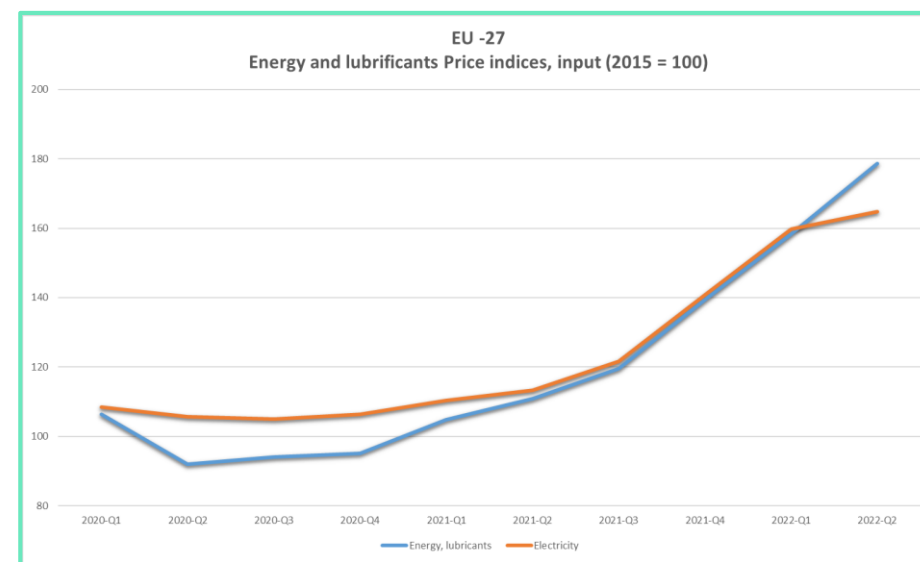




# INPUT PRICES – QUARTERLY DATA

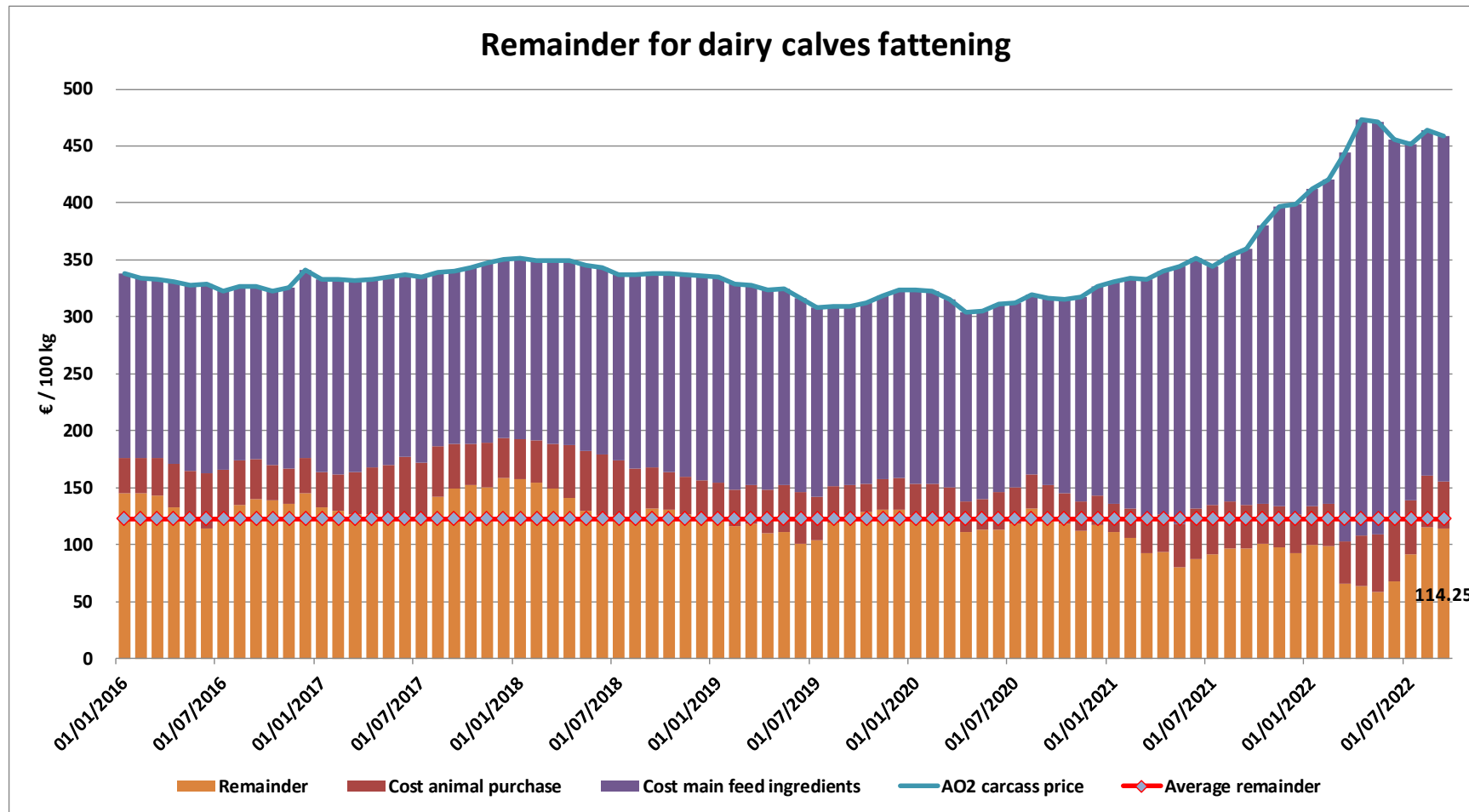


- Feed prices 30-36% more expensive compared to last year
- Slight reduction in the last months (not visible in the graph)
- Fertilisers prices seen the highest increases, in particular nitrogen fertilisers
- Energy 50-60% more expensive

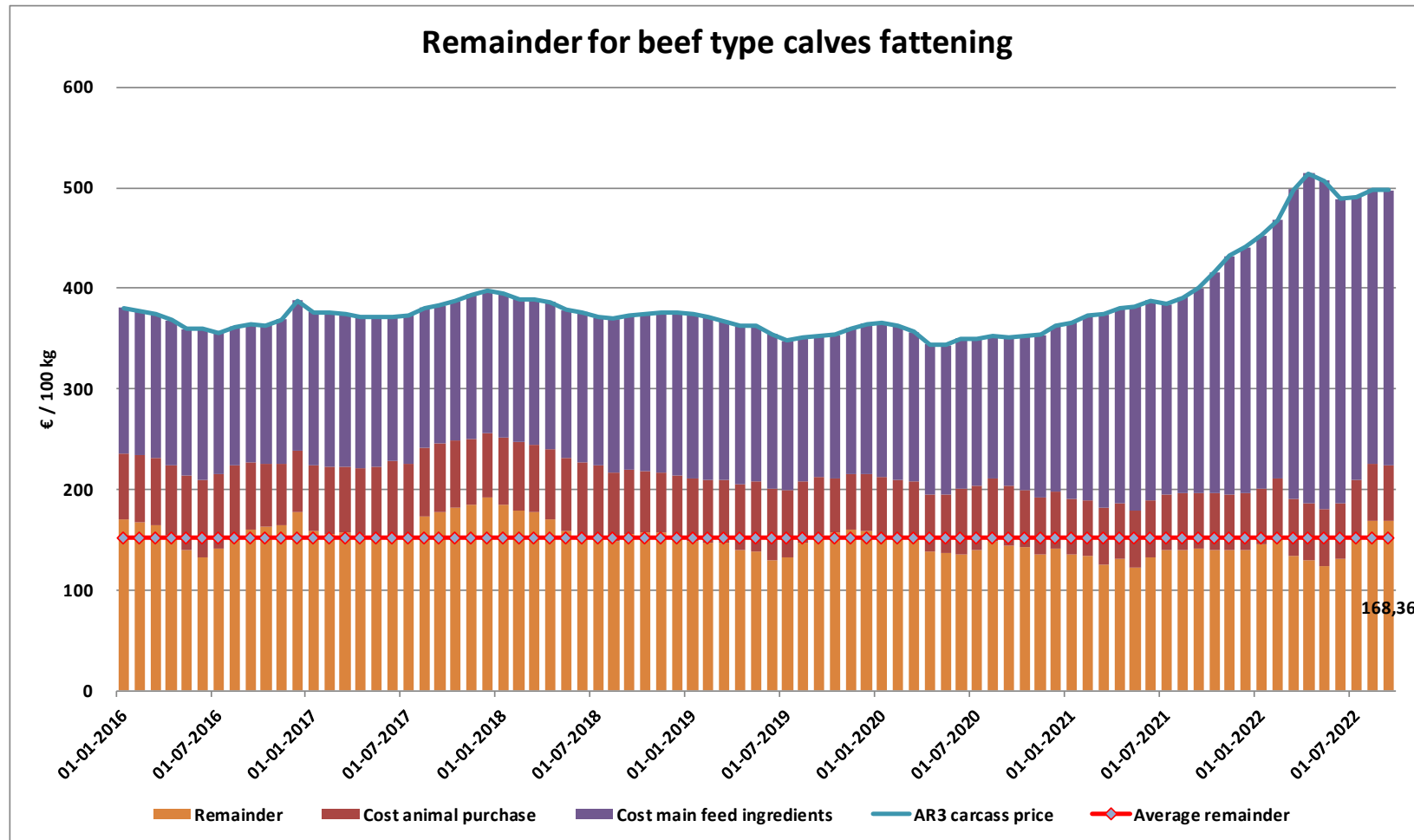




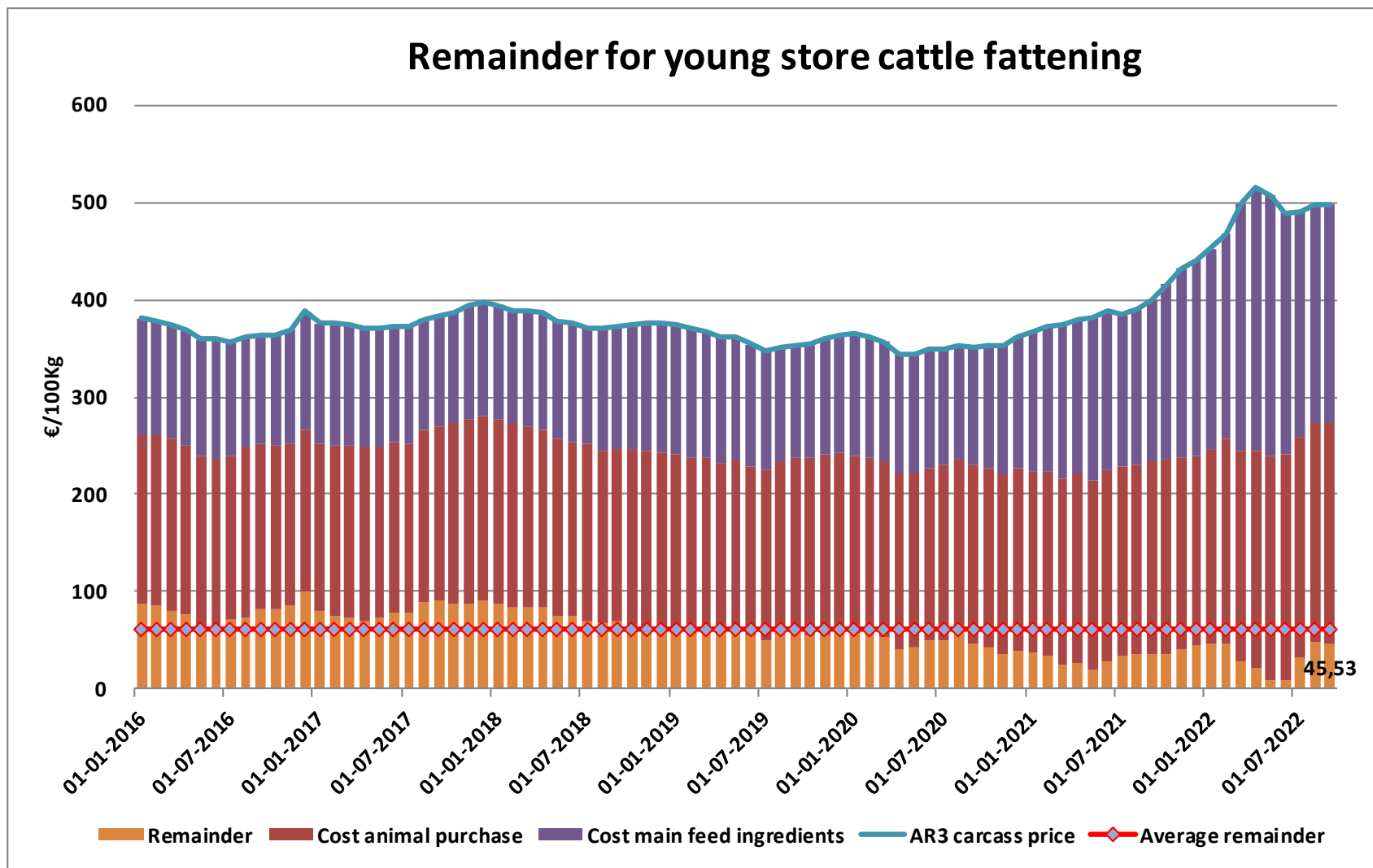
# REMAINDERS



# REMAINDERS



# REMAINDERS



# TRADE

## EU EXPORTS

### Beef & Live Animals

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

*In Tons of Carcase Weight*

Destinations	2020		2021		Jan to Jul 2022		Compared to Jan to Jul 2021
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	450.456	39,5%	344.435	33,4%	229.104	40,2%	+25,8%
Israel	56.139	4,9%	66.022	6,4%	37.246	6,5%	-4,6%
Ghana	47.344	4,2%	47.640	4,6%	23.832	4,2%	-17,5%
Bosnia-Herz.	34.896	3,1%	40.449	3,9%	20.699	3,6%	-8,4%
Philippines	33.650	3,0%	34.666	3,4%	18.042	3,2%	-18,2%
Ivory Coast	32.433	2,8%	29.236	2,8%	17.764	3,1%	-5,7%
Switzerland	26.223	2,3%	28.718	2,8%	15.157	2,7%	-14,2%
Lebanon	33.709	3,0%	19.527	1,9%	14.716	2,6%	+12,3%
Japan	11.885	1,0%	21.888	2,1%	12.909	2,3%	+16,0%
Algeria	39.396	3,5%	24.111	2,3%	11.579	2,0%	-37,8%
Canada	20.450	1,8%	20.676	2,0%	11.444	2,0%	+16,0%
Other Destinations	352.811	31,0%	353.444	34,3%	157.540	27,6%	-24,1%
Extra-EU	1.139.392		1.030.812		570.032		-3,6%
% Change				-9,5%			

*In Thousand Euros*

	2020		2021		Jan to Jul 2022		Compared to Jan to Jul 2021
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	1.508.377	40,2%	1.491.830	38,4%	1.007.811	41,8%	+32,5%
Israel	266.074	7,1%	328.295	8,4%	213.010	8,8%	+12,3%
Ghana	43.585	1,2%	48.021	1,2%	28.226	1,2%	-0,7%
Bosnia-Herz.	96.620	2,6%	126.247	3,2%	84.924	3,5%	+27,6%
Philippines	61.861	1,6%	73.028	1,9%	47.075	2,0%	+8,7%
Ivory Coast	21.626	0,6%	25.684	0,7%	14.907	0,6%	-5,9%
Switzerland	142.125	3,8%	171.272	4,4%	112.305	4,7%	+13,8%
Lebanon	131.329	3,5%	80.664	2,1%	75.921	3,1%	+40,8%
Japan	43.177	1,1%	98.109	2,5%	75.221	3,1%	+76,0%
Algeria	193.457	5,2%	111.646	2,9%	71.325	3,0%	-16,1%
Canada	65.044	1,7%	73.398	1,9%	46.797	1,9%	+41,2%
Other Destinations	1.182.539	31,5%	1.257.525	32,4%	635.894	26,3%	-10,6%
Extra-EU	3.755.813		3.885.719		2.413.416		+13,4%
% Change				+3,5%			

# TRADE

## EU EXPORTS

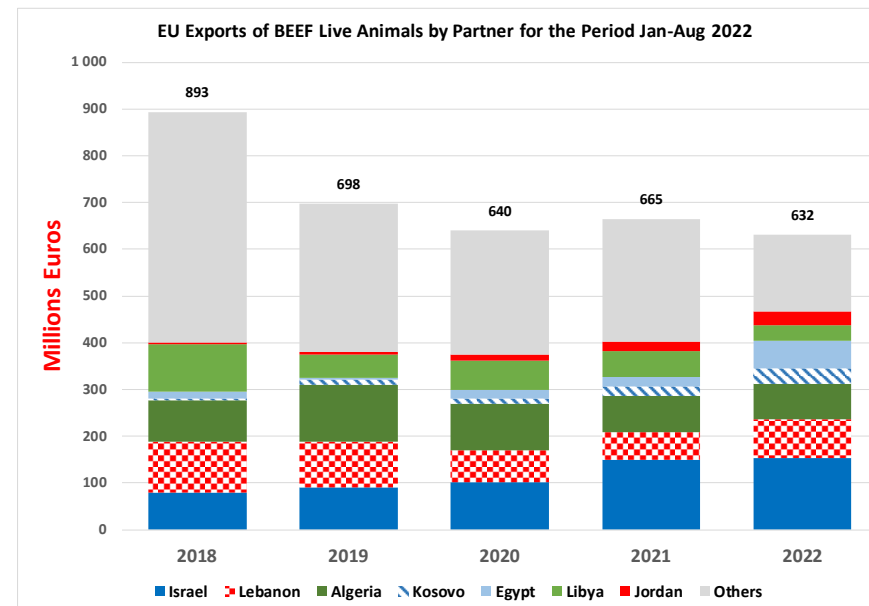
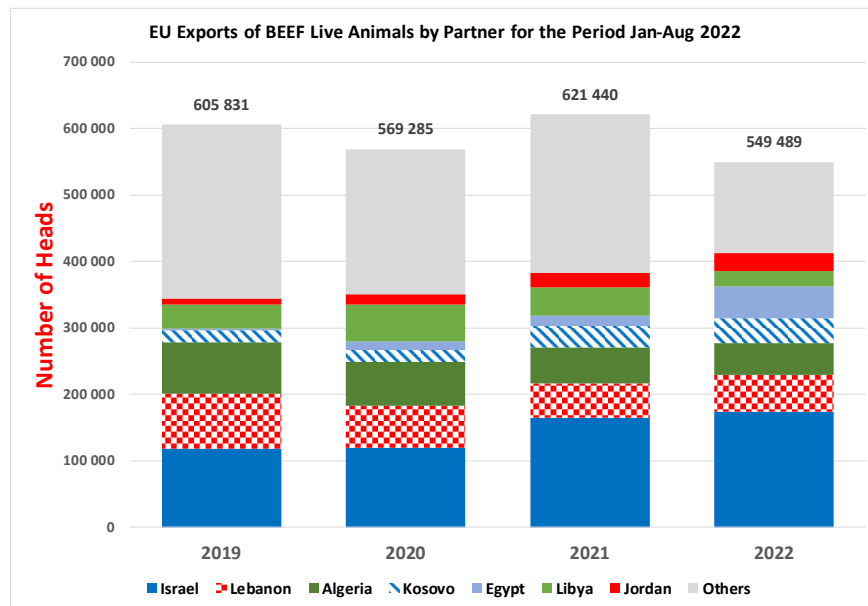
### Beef & Live Animals

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

Destinations	2018		2019		2020		2021		Jan-Aug 22		Compared to
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Israel	47 036	6.8%	48 505	7.1%	56 139	8.1%	66 022	9.6%	43 067	11.1%	- 6.0%
Ghana	36 766	5.3%	39 196	5.7%	47 344	6.9%	47 640	6.9%	25 784	6.6%	- 22.6%
Bosnia-Herz.	37 675	5.4%	40 013	5.8%	34 896	5.1%	40 449	5.9%	25 008	6.4%	- 6.2%
Philippines	27 857	4.0%	31 302	4.6%	33 650	4.9%	34 666	5.1%	20 924	5.4%	- 14.3%
Ivory Coast	36 064	5.2%	33 396	4.9%	32 433	4.7%	29 236	4.3%	20 732	5.3%	- 2.5%
Switzerland	20 123	2.9%	21 398	3.1%	26 223	3.8%	28 718	4.2%	17 606	4.5%	- 13.3%
Lebanon	42 362	6.1%	36 221	5.3%	33 709	4.9%	19 527	2.8%	16 425	4.2%	+ 11.2%
Japan	3 452	0.5%	7 982	1.2%	11 885	1.7%	21 888	3.2%	14 465	3.7%	+ 6.2%
Canada	2 225	0.3%	6 756	1.0%	20 450	3.0%	20 676	3.0%	13 008	3.4%	+ 11.0%
Algeria	35 410	5.1%	57 152	8.3%	39 396	5.7%	24 111	3.5%	12 245	3.2%	- 34.2%
Egypt	6 218	0.9%	3 105	0.5%	7 718	1.1%	10 540	1.5%	11 151	2.9%	+ 96.5%
Kosovo	6 164	0.9%	9 896	1.4%	10 391	1.5%	16 488	2.4%	10 779	2.8%	+ 0.1%
Norway	7 783	1.1%	7 622	1.1%	12 873	1.9%	18 233	2.7%	10 669	2.8%	- 27.0%
Ukraine	10 445	1.5%	13 627	2.0%	14 988	2.2%	15 076	2.2%	8 553	2.2%	- 8.2%
Hong Kong	55 439	8.0%	46 639	6.8%	56 713	8.2%	44 823	6.5%	7 563	2.0%	- 77.7%
Chile	33 954	4.9%	12 461	1.8%	8 664	1.3%	9 915	1.4%	7 341	1.9%	+ 66.2%
Other Destinations	282 450	40.9%	271 405	39.5%	241 466	35.0%	238 369	34.7%	122 504	31.6%	
<b>Total (without UK)</b>	<b>691 423</b>		<b>686 677</b>		<b>688 936</b>		<b>686 377</b>		<b>387 822</b>		
% change			- 1%		+ 0%		- 0%		- 16.5%		

# TRADE

## EU EXPORTS Live Animals



# TRADE

## EU IMPORTS Beef & Live Animals

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

*In Tons of Carcase Weight*

Origins	2020		2021		Jan to Jul 2022		Compared to Jan to Jul 2021
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	120.744	35,1%	87.539	28,3%	77.894	34,6%	+68,7%
Brazil	84.139	24,4%	81.573	26,4%	50.832	22,6%	+10,6%
Argentina	56.421	16,4%	52.286	16,9%	36.636	16,3%	+34,0%
Uruguay	34.611	10,0%	42.669	13,8%	26.866	11,9%	-4,3%
USA	16.532	4,8%	14.826	4,8%	10.389	4,6%	+42,8%
Australia	11.058	3,2%	8.925	2,9%	6.172	2,7%	-5,1%
New Zealand	6.116	1,8%	4.378	1,4%	3.189	1,4%	+37,1%
Paraguay	4.234	1,2%	3.933	1,3%	2.872	1,3%	+48,4%
Japan	789	0,2%	1.478	0,5%	2.305	1,0%	+++
Switzerland	4.187	1,2%	4.714	1,5%	2.130	0,9%	-15,7%
Namibia	1.445	0,4%	1.996	0,6%	2.095	0,9%	+++
Other Destinations	4.130	1,2%	4.625	1,5%	3.516	1,6%	+40,1%
Extra-EU	344.404		308.942		224.894		+30,9%
% Change				-10,3%			

*In Thousand Euros*

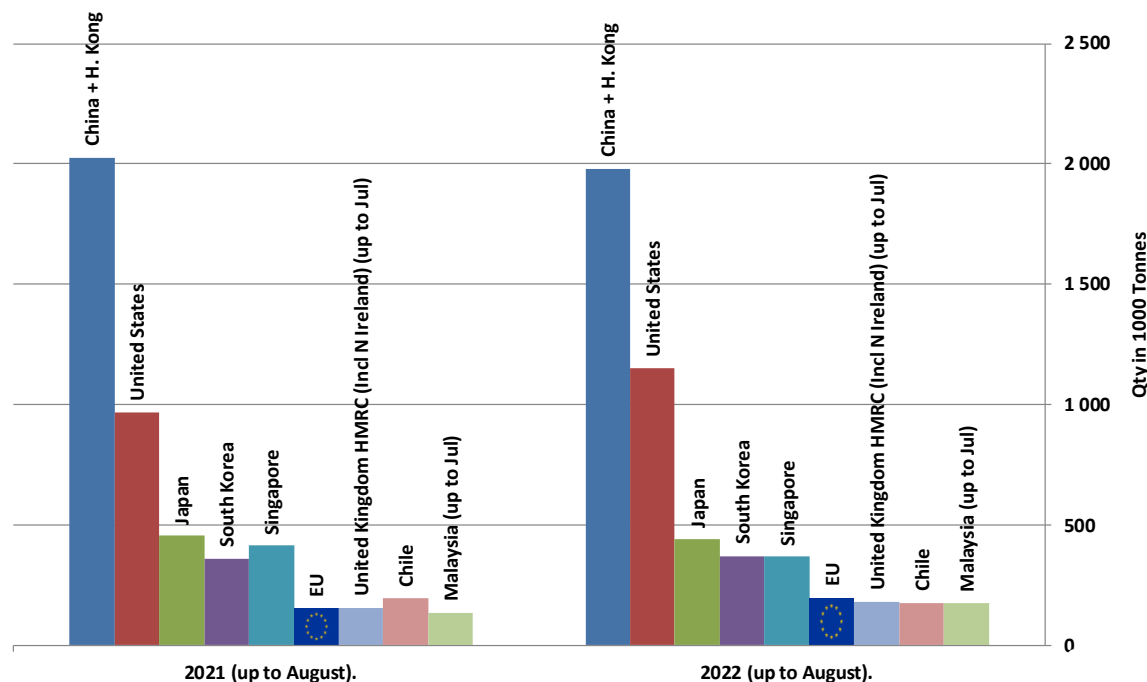
	2020		2021		Jan to Jul 2022		Compared to Jan to Jul 2021
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	483.287	26,5%	358.525	20,1%	326.532	22,1%	+77,0%
Brazil	377.626	20,7%	386.666	21,7%	298.720	20,2%	+46,7%
Argentina	358.357	19,7%	376.451	21,1%	321.664	21,8%	+92,2%
Uruguay	210.062	11,5%	247.057	13,9%	218.136	14,8%	+47,3%
USA	154.464	8,5%	155.927	8,7%	122.203	8,3%	+72,4%
Australia	91.489	5,0%	90.483	5,1%	69.281	4,7%	+10,6%
New Zealand	41.142	2,3%	31.627	1,8%	27.523	1,9%	+81,1%
Paraguay	20.834	1,1%	20.484	1,1%	18.774	1,3%	+++
Japan	10.314	0,6%	25.588	1,4%	19.369	1,3%	+78,7%
Switzerland	44.984	2,5%	53.395	3,0%	25.340	1,7%	-10,1%
Namibia	5.725	0,3%	6.902	0,4%	9.176	0,6%	+++
Other Destinations	24.052	1,3%	30.274	1,7%	21.567	1,5%	+39,5%
Extra-EU	1.822.336		1.783.379		1.478.285		+61,2%
% Change				-2,1%			



# WORLD BEEF MARKET

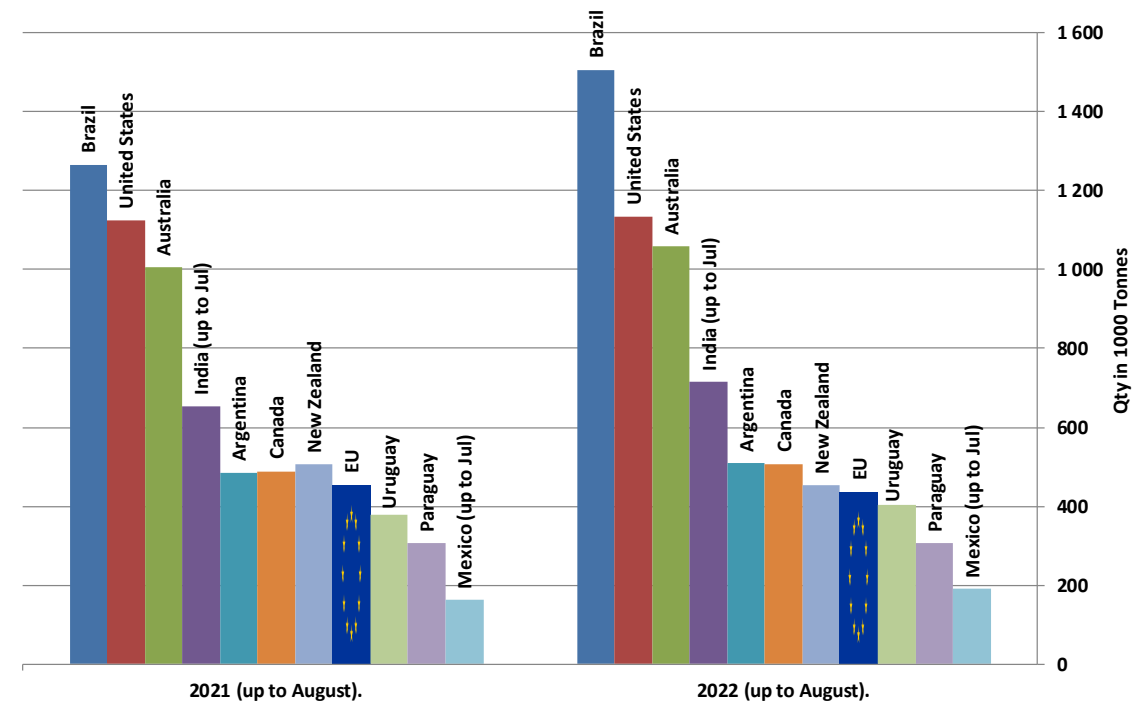
## Main Importers of BEEF Products (up to August).

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



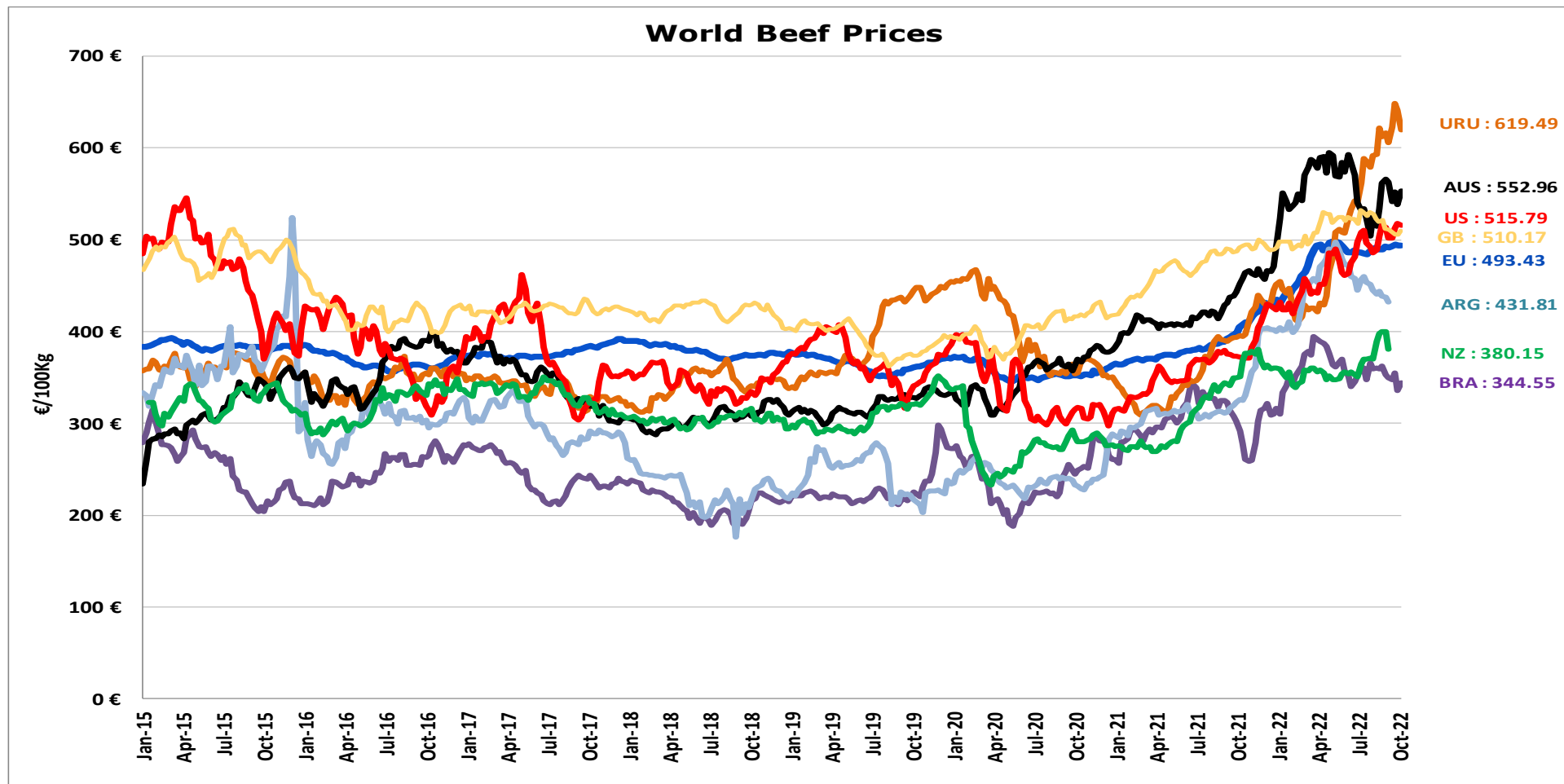
## Main Exporters of BEEF Products (up to August).

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



- AUS – **NEW PRICE**
- processor yearling steer
- Live weight 330-400 kg (converted to c.w.)
- It describes what processors are paying for young cattle out of the saleyard. Yearling steers bought by processors in the saleyard are said to be in finished condition and ready for slaughter.

ECB <http://sdw.ecb.europa.eu/browse.do?node=2018794>  
 US <https://www.marketnews.usda.gov/mnp/lis-home>  
 AUS <https://www.mla.com.au/prices-markets/cattle/processoryearlingsteer/>  
 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)  
 GB <https://ahdb.org.uk/beef/gb-deadweight-cattle-prices-by-region>

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/>

# New functionality – Beef carcass prices

Beef prices (carcasses)

agridata.ec.europa.eu/extensions/DashboardBeef/BeefPricesExt.html#

Getting Started Imported From Fire... Studio I miei file - OneDrive Le Soir - L'actualité... Other bookmarks

European Commission | Beef prices (carcasses) Directorate-General for Agriculture and Rural Development

SELECT VIEW: **Extended Analysis - Advanced Users**

Year Member State Category Product

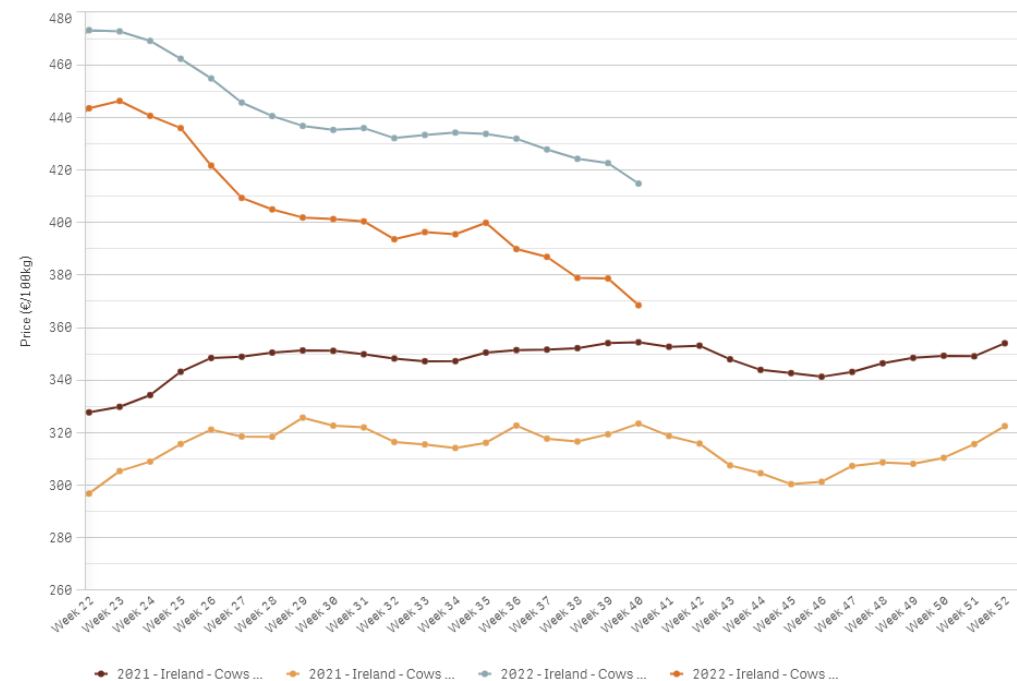
Bulk Download Reset Selections Print to PDF

This sheet provides data of all products and not only the most representative of the category. It provides extended analysis for advanced users.

App update: 21/10/2022

## Beef Carcass Price Comparison for Ireland

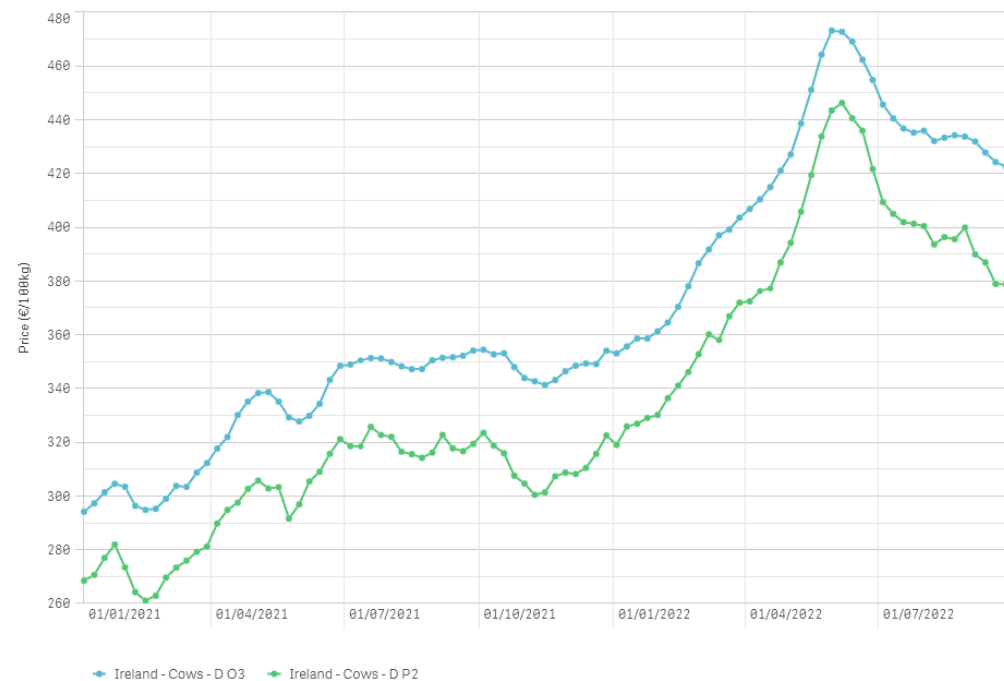
Year Selection: 2021, 2022 | Category: Cows | Product: D O3, D P2



Prices for the European Union are calculated as a weighted average of price data from all Member States.

## Beef Carcass Price Evolution for Ireland

Year Selection: 2021, 2022 | Category: Cows | Product: D O3, D P2



Prices for the European Union are calculated as a weighted average of price data from all Member States.

# Thank you



© European Union 2020

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](#) license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.

Slide xx: element concerned, source: e.g. Fotolia.com; Slide xx: element concerned, source: e.g. iStock.com

