



# European Meat Market Observatory

Beef and Veal market

*22 February 2021*

# PRODUCTION

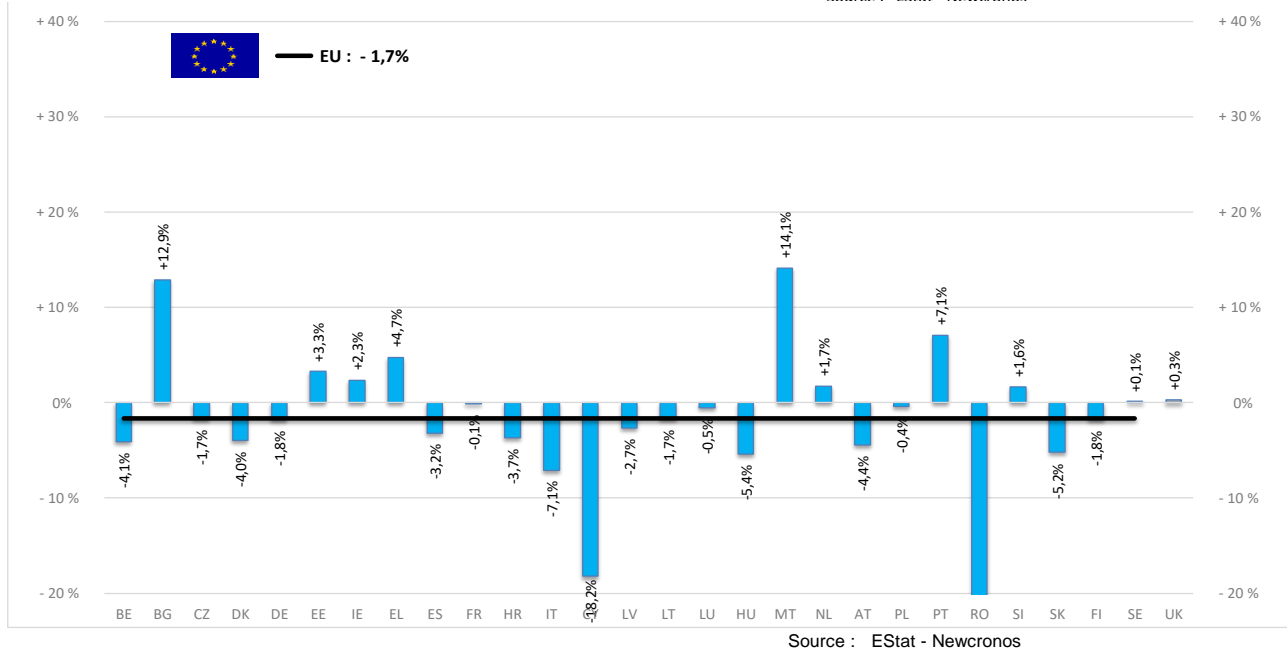
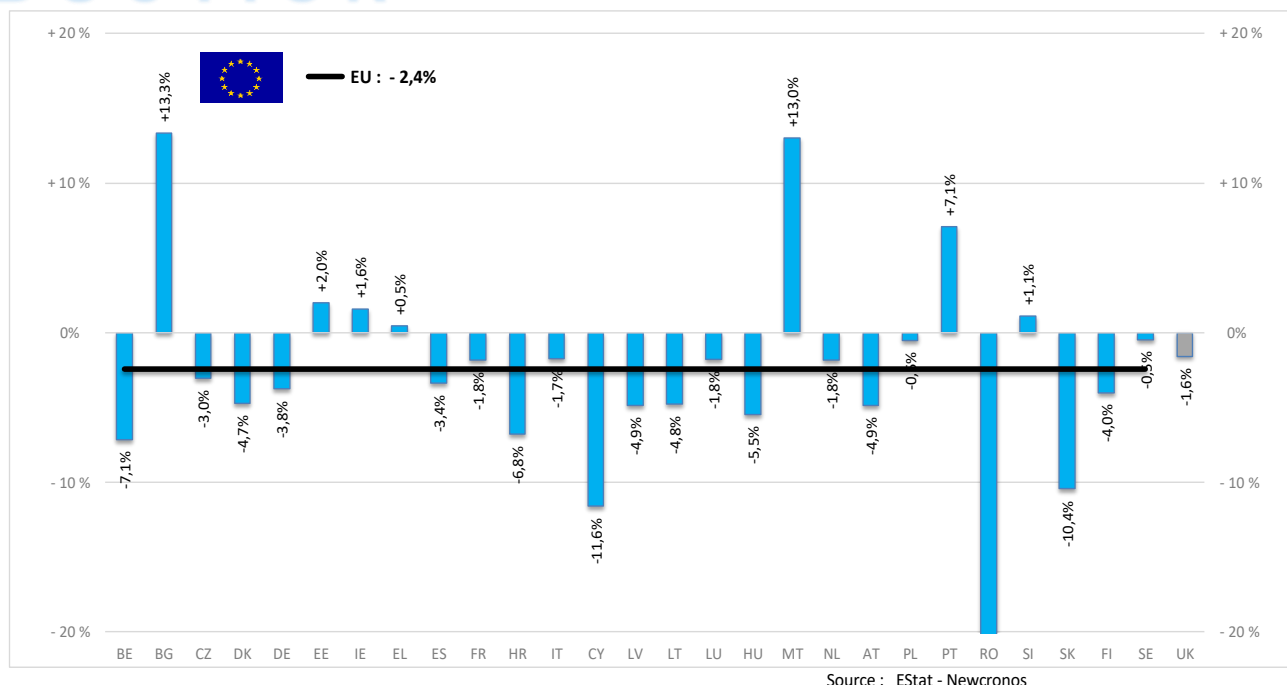
# % EVOLUTION

HEADS	Jan-Nov 20/19	
	EU	EU + UK
Bull	-2,2%	-2,3%
Bullock	+7,3%	+3,1%
Cow	-2,6%	-2,3%
Heifer	+0,4%	+0,8%
Calve	-6,3%	-7,3%
Young cattle	-3,8%	-3,9%
Meat of bovine animals	-2,4%	-2,3%

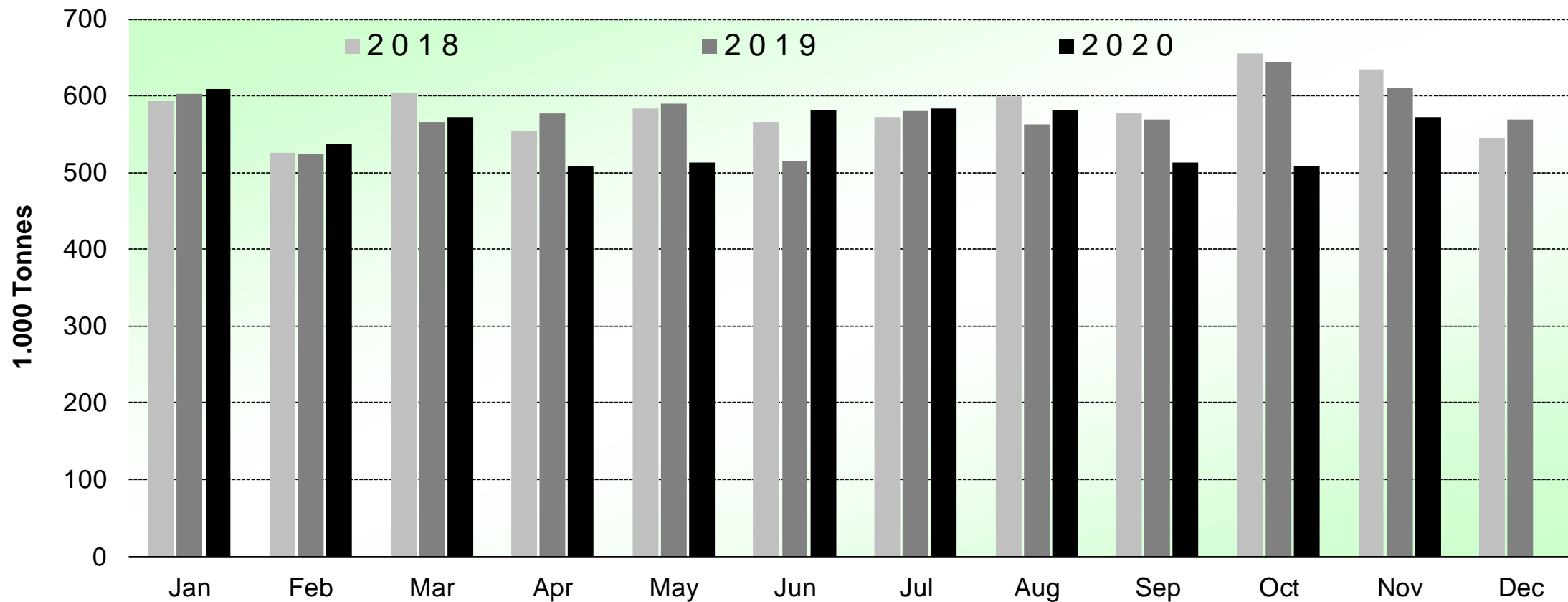
Estimates for last month of period :

TONNES	Jan-Nov 20/19	
	EU	EU + UK
Bull	-1,9%	-2,0%
Bullock	+9,2%	+3,8%
Cow	-1,8%	-1,5%
Heifer	-0,6%	+0,2%
Calve	-7,0%	-7,1%
Young cattle	-3,4%	-3,5%
Meat of bovine animals	-1,7%	-1,4%

Estimates for last month of period :



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



Source : EStat-Newcronos

# PRICES CARCASSES

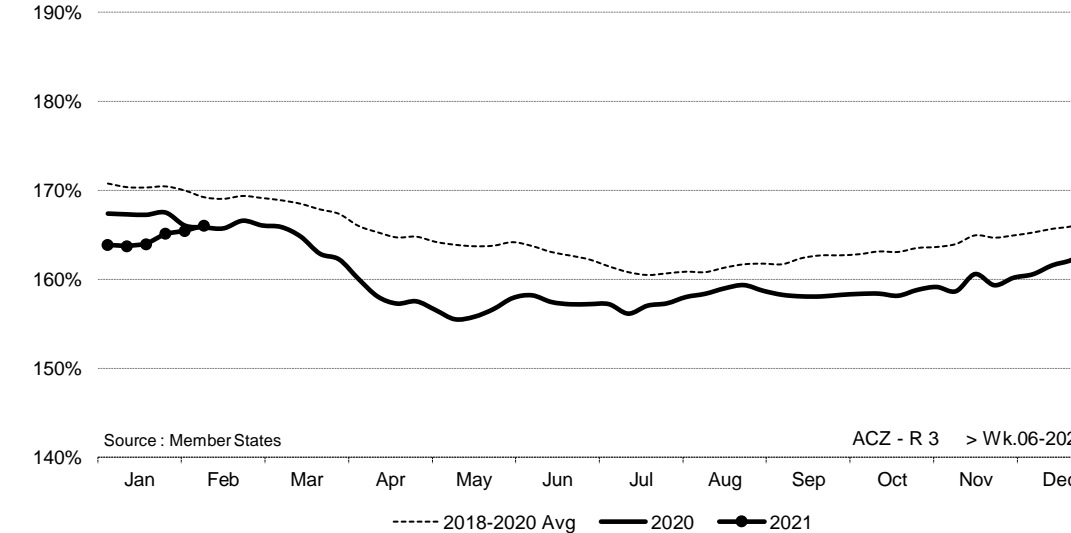
EU Prices week		6	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	369,2	€/100 kg	+ 0,4%	+ 1,4%	+ 0,1%
	Young Bovines (Z)	357,9		+ 0,0%	+ 0,7%	+ 0,0%
	Young Bulls (A)	370,2		+ 0,7%	+ 1,8%	+ 2,3%
	Steers (C)	378,9		- 1,2%	+ 0,1%	+ 3,1%
	Cows (D)	278,2		+ 1,1%	+ 1,8%	- 0,4%
	Heifers (E)	373,9		- 1,1%	- 0,3%	+ 1,4%
Live Animals	Male Calves Dairy Type	64,44	€/head	+ 0,4%	- 5,3%	- 14,1%
	Male Calves Beef Type	189,8		+ 0,1%	+ 3,6%	- 2,0%
	Young Store Cattle	2,38	€/kg	- 0,3%	+ 0,5%	- 1,6%
	Yearling Male Store Cattle	2,22		+ 0,4%	+ 2,4%	+ 0,3%
	Yearling Female Store Cattle	2,45		+ 0,4%	+ 1,0%	+ 5,1%
	Calves slaughtered <8M	458,7	€/100	- 0,1%	+ 1,3%	- 14,7%

## EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.06-2021

% of Reference Price

€/100 kg cwe



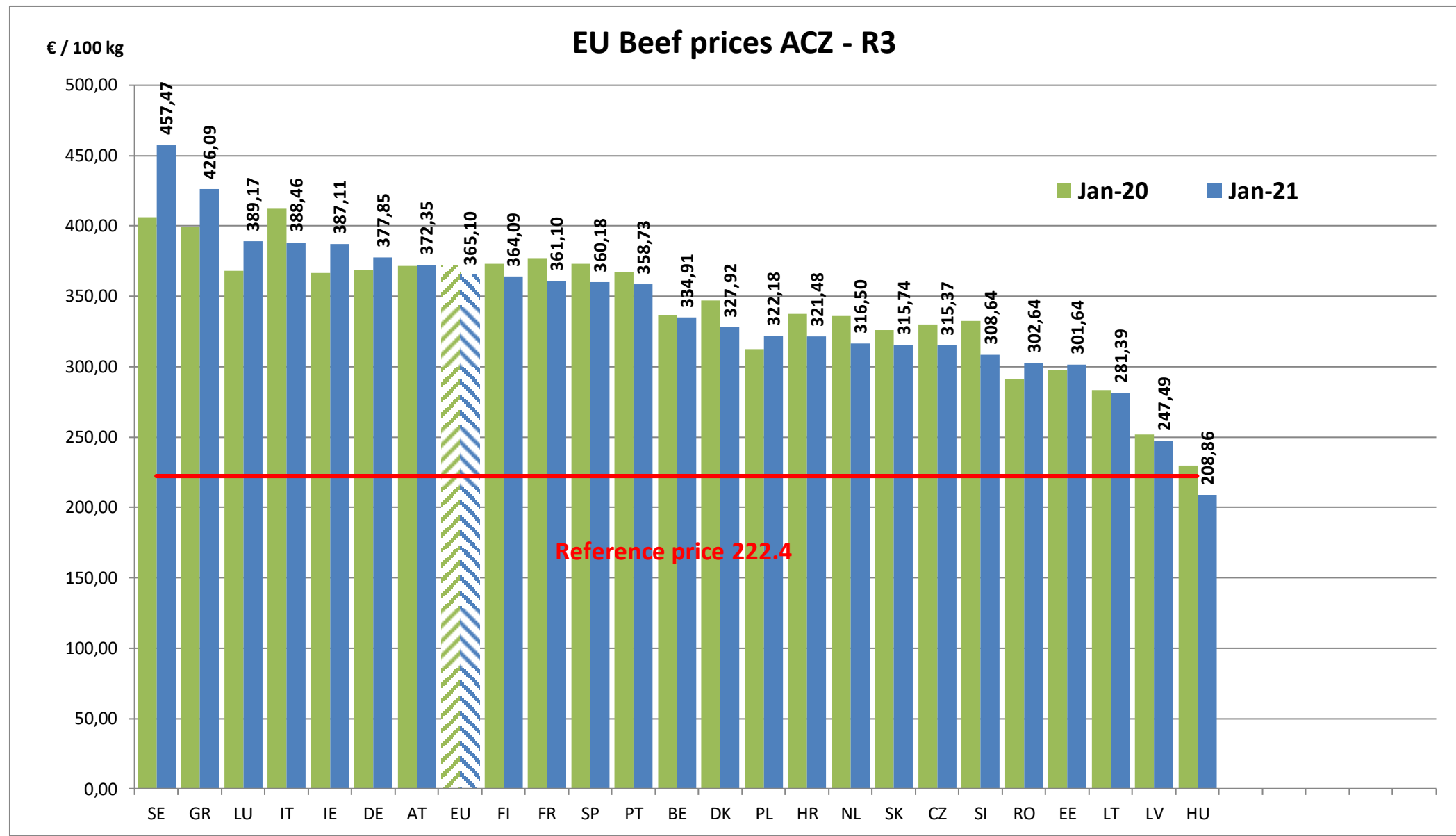
Price in week 06 : 369,28

% change y/y : + 0,13%

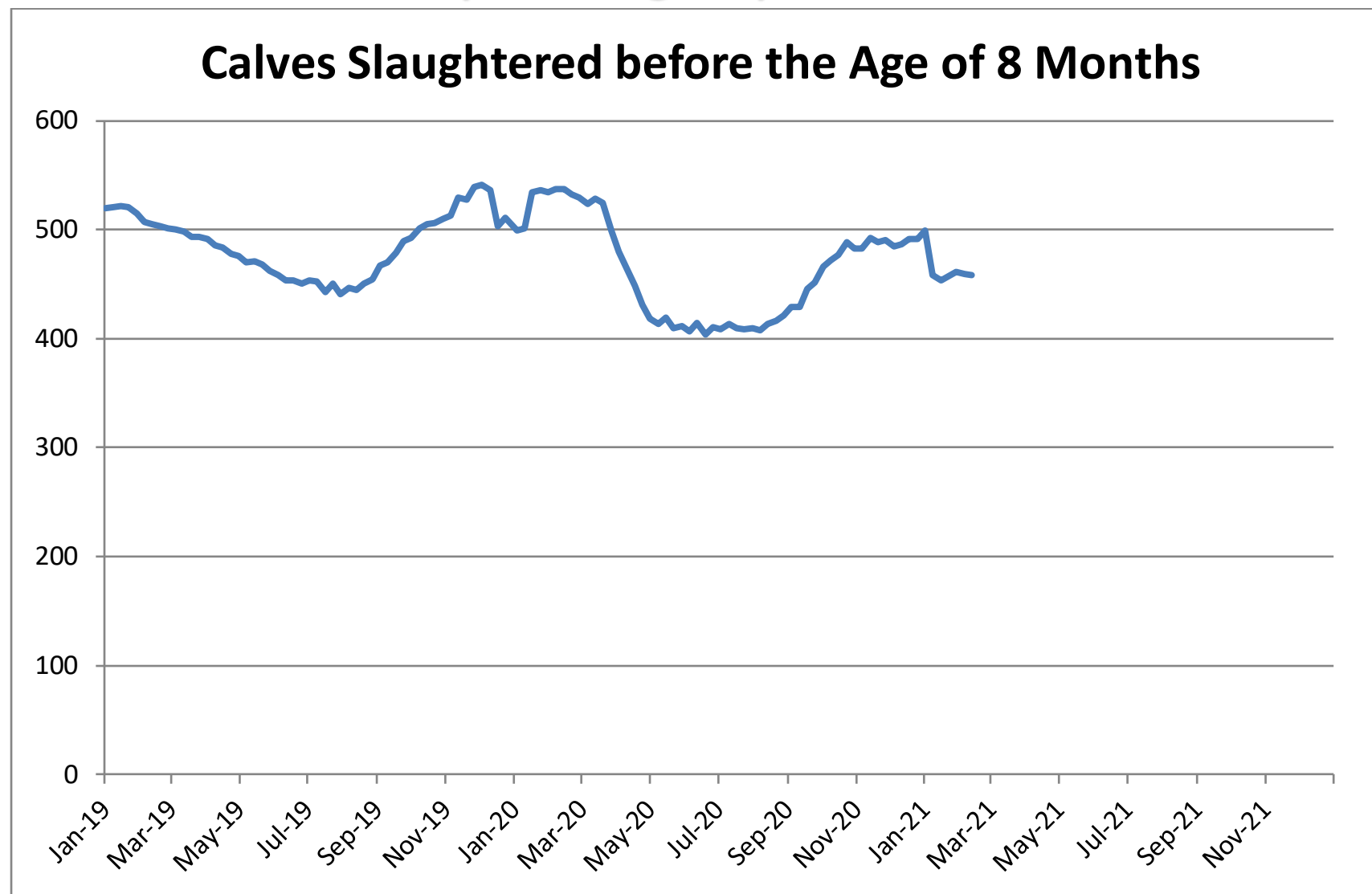
% Ref. Price in wk 6 : 166,0%

Average price in January 2021 : 365,09

% change y/y : - 1,78%



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



**Price in Week 6**      **458,78 € / 100 kg of carcasse weight**  
 Change y/y    -14,66%

# EU Exports of Beef and Live Animals (COMEXT – tonnes cwe)

Destinations	2016		2017		2018		2019		Jan-Dec 20		Compared to Jan-Dec 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Israel	41 535	6.2%	44 196	6.1%	47 774	6.8%	49 629	7.1%	56 968	8.1%	+ 14.8%
Hong Kong	47 533	7.1%	76 086	10.5%	55 537	7.9%	46 748	6.7%	56 860	8.1%	+ 21.6%
Ghana	37 490	5.6%	37 744	5.2%	36 766	5.2%	39 196	5.6%	47 401	6.7%	+ 20.9%
Philippines	24 116	3.6%	37 102	5.1%	28 766	4.1%	34 158	4.9%	39 927	5.7%	+ 16.9%
Algeria	25 004	3.7%	26 305	3.6%	35 410	5.0%	57 152	8.2%	39 416	5.6%	- 31.0%
Bosnia-Herz.	38 875	5.8%	34 711	4.8%	38 762	5.5%	41 119	5.9%	35 758	5.1%	- 13.0%
Lebanon	47 010	7.0%	38 322	5.3%	42 542	6.1%	36 393	5.2%	33 656	4.8%	- 7.5%
Ivory Coast	35 371	5.3%	36 038	5.0%	36 064	5.1%	33 396	4.8%	32 460	4.6%	- 2.8%
Switzerland	24 873	3.7%	26 708	3.7%	23 761	3.4%	25 188	3.6%	29 996	4.3%	+ 19.1%
Turkey	71 030	10.6%	96 413	13.3%	96 052	13.7%	34 555	4.9%	22 128	3.1%	- 36.0%
Libya	29 723	4.4%	27 848	3.8%	27 878	4.0%	24 541	3.5%	21 971	3.1%	- 10.5%
Canada	862	0.1%	2 424	0.3%	2 225	0.3%	6 806	1.0%	20 475	2.9%	+++
Ukraine	7 875	1.2%	7 331	1.0%	10 465	1.5%	13 836	2.0%	15 857	2.3%	+ 14.6%
China	10 254	1.5%	5 738	0.8%	6 712	1.0%	22 318	3.2%	15 505	2.2%	- 30.5%
Norway	18 313	2.7%	12 850	1.8%	7 925	1.1%	7 667	1.1%	12 931	1.8%	+ 68.7%
USA	3 137	0.5%	3 756	0.5%	5 458	0.8%	7 867	1.1%	12 310	1.7%	+ 56.5%
Other Destinations	210 032	31.2%	213 950	29.4%	199 783	28.5%	219 676	31.4%	210 899	29.9%	
<b>Total (without UK)</b>	<b>673 029</b>		<b>727 522</b>		<b>701 882</b>		<b>700 245</b>		<b>704 518</b>		
% change			+ 8%		- 4%		- 0%		+ 0.6%		
<b>United Kingdom</b>	<b>477 394</b>		<b>493 227</b>		<b>486 480</b>		<b>440 357</b>		<b>422 521</b> up to Nov 20		#N/A

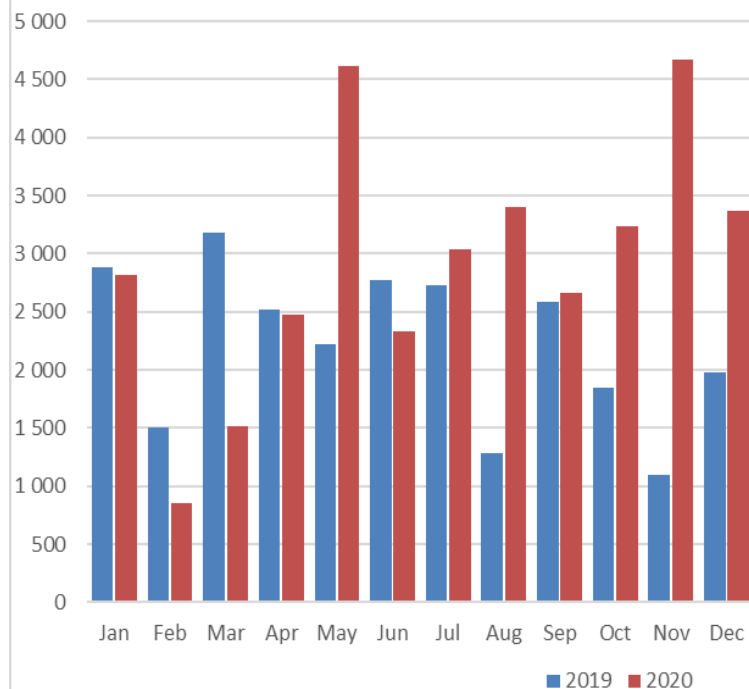
# EU Exports of Beef (COMEXT – tonnes cwe)

Destinations	2016		2017		2018		2019		Jan-Dec 20		Compared to Jan-Dec 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	47 533	10.5%	76 086	15.5%	55 537	11.9%	46 748	9.8%	56 860	11.6%	+ 21.6%
Ghana	37 490	8.3%	37 744	7.7%	36 766	7.9%	39 196	8.2%	47 401	9.7%	+ 20.9%
Philippines	24 116	5.3%	37 102	7.5%	28 766	6.2%	34 158	7.2%	39 927	8.1%	+ 16.9%
Bosnia-Herz.	36 790	8.1%	32 181	6.5%	36 152	7.7%	38 806	8.2%	33 459	6.8%	- 13.8%
Ivory Coast	35 371	7.8%	36 028	7.3%	36 064	7.7%	33 396	7.0%	32 460	6.6%	- 2.8%
Switzerland	23 705	5.2%	25 570	5.2%	22 711	4.9%	24 110	5.1%	28 941	5.9%	+ 20.0%
Israel	15 056	3.3%	18 750	3.8%	22 163	4.7%	23 026	4.8%	21 970	4.5%	- 4.6%
Canada	862	0.2%	2 424	0.5%	2 225	0.5%	6 806	1.4%	20 475	4.2%	+++
China	10 254	2.3%	5 738	1.2%	6 712	1.4%	22 317	4.7%	15 505	3.2%	- 30.5%
Ukraine	7 094	1.6%	6 926	1.4%	9 887	2.1%	12 893	2.7%	14 861	3.0%	+ 15.3%
Norway	18 308	4.0%	12 849	2.6%	7 922	1.7%	7 667	1.6%	12 931	2.6%	+ 68.7%
USA	3 137	0.7%	3 756	0.8%	5 458	1.2%	7 867	1.7%	12 310	2.5%	+ 56.5%
Japan	3 253	0.7%	4 281	0.9%	3 452	0.7%	8 007	1.7%	11 885	2.4%	+ 48.4%
North Macedonia	11 413	2.5%	11 285	2.3%	10 002	2.1%	11 395	2.4%	10 550	2.1%	- 7.4%
Angola	13 326	2.9%	10 982	2.2%	11 470	2.5%	8 410	1.8%	9 410	1.9%	+ 11.9%
Chile	2 228	0.5%	8 961	1.8%	16 410	3.5%	12 461	2.6%	8 664	1.8%	- 30.5%
Other Destinations	163 284	36.0%	161 717	32.8%	155 126	33.2%	138 056	29.0%	113 280	23.1%	
<b>Total (without UK)</b>	<b>453 219</b>		<b>492 379</b>		<b>466 824</b>		<b>475 318</b>		<b>490 890</b>		
% change			+ 9%		- 5%		+ 2%		+ 3.3%		
United Kingdom	468 016	50.8%	482 057	49.5%	475 987	50.5%	429 663	47.5%	410 321 up to Nov 20		#N/A

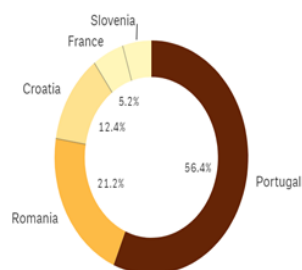


# Live animal export to main destinations

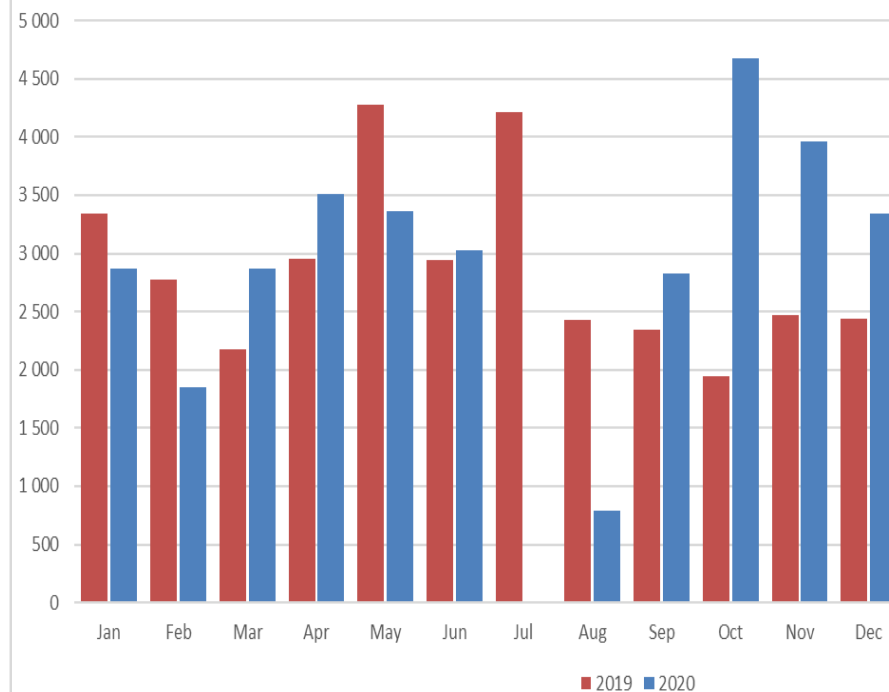
## Live animal export to Israel (CWT)



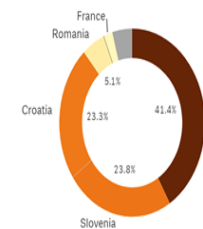
PT, flow: EXPORT, product group: Live animals, partner: Israel, Marketing Year: 2020, all months



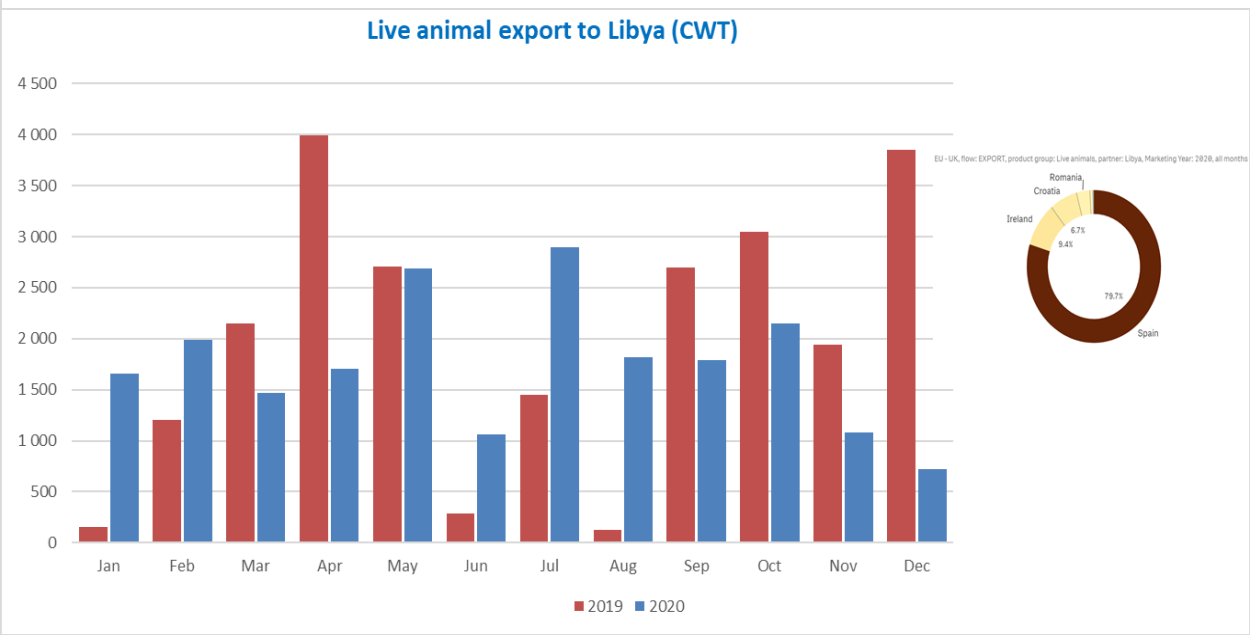
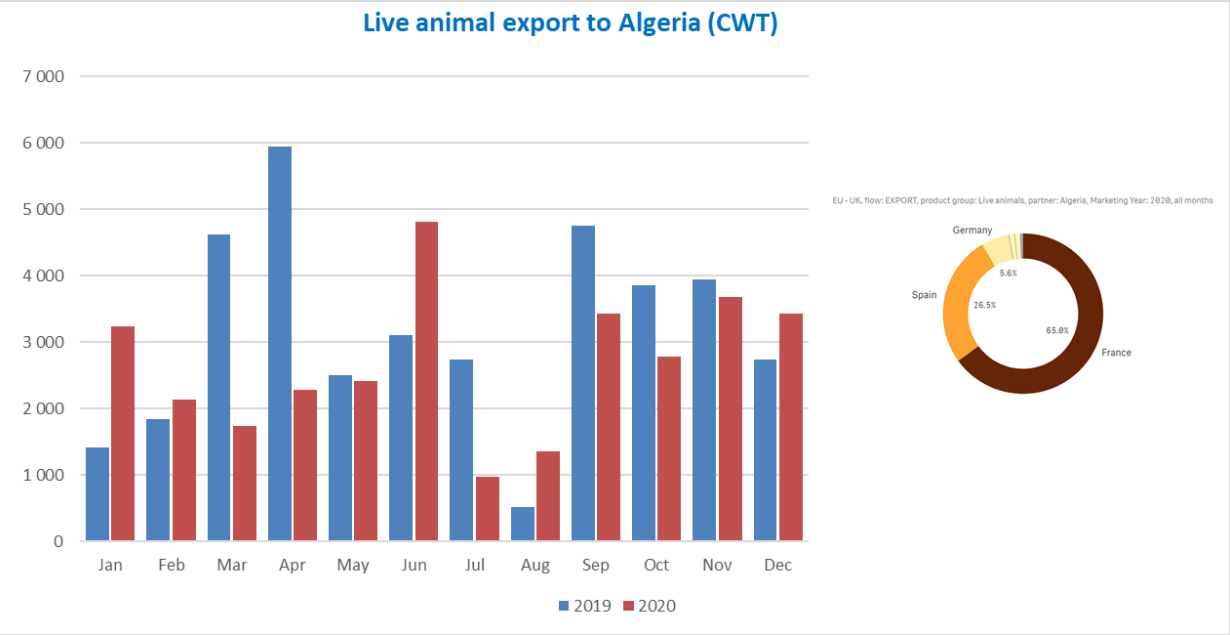
## Live animal export to Lebanon (CWT)



EU - UK, flow: EXPORT, product group: Live animals, partner: Lebanon, Marketing Year: 2020, all months

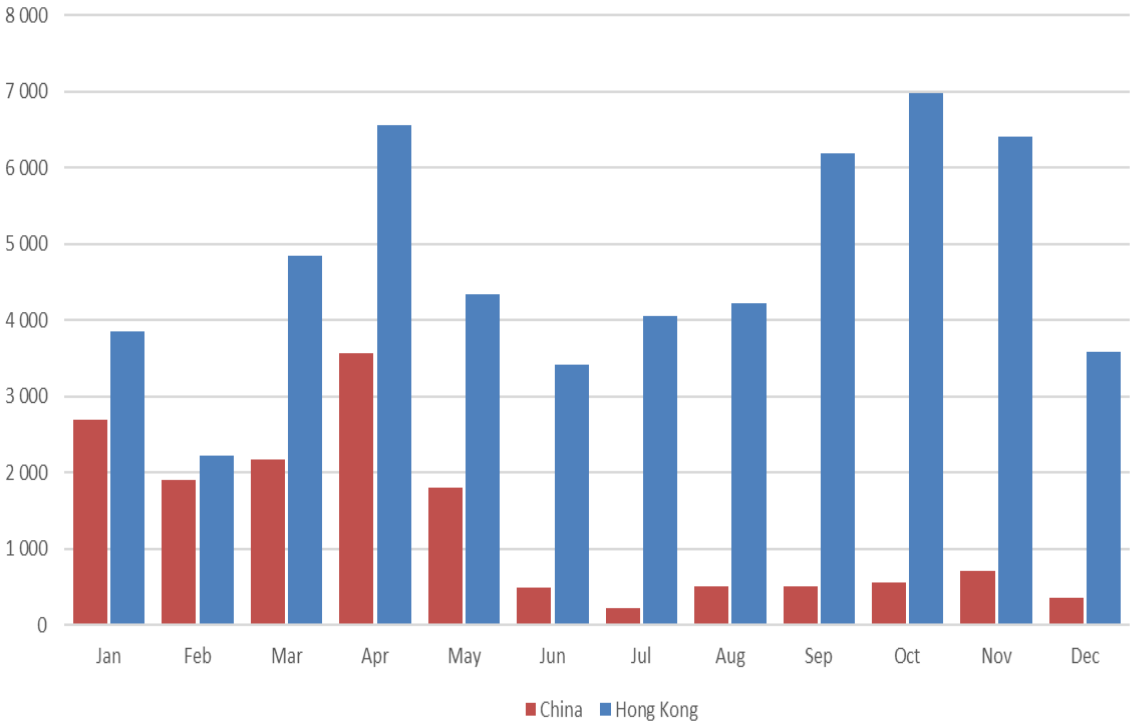


# Live animal export to main destinations

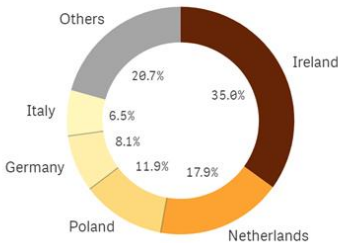


# Beef export to China and Hong Kong

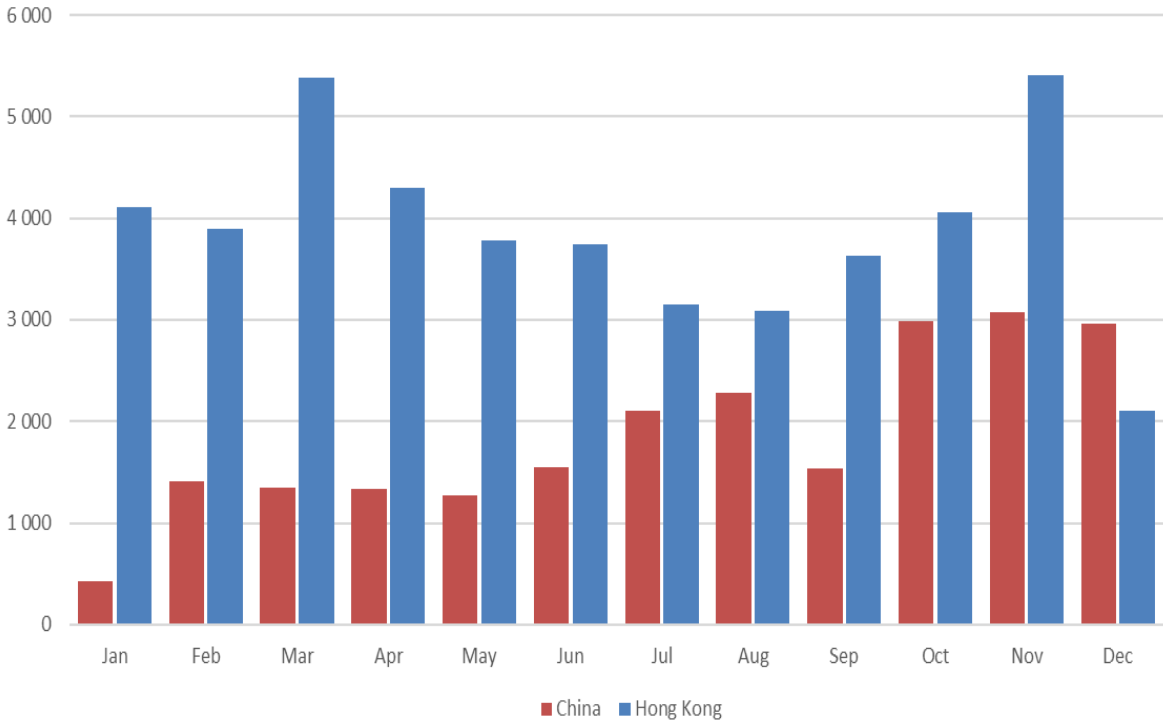
Beef export to CN+HK (CWT) in 2020



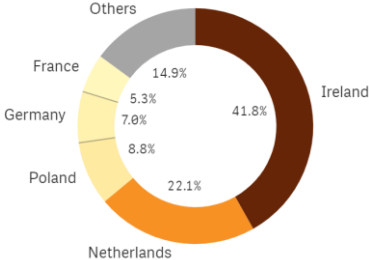
EU - UK, flow: EXPORT, product group: Fresh meat, Frozen Meat, Offals, Preparations, Salted, dried, smoked meat, partner: China, Hong Kong, Marketing Year: 2020, all months



Beef export to CN+HK (CWT) in 2019



EU - UK, flow: EXPORT, product group: Fresh meat, Frozen Meat, Offals, Preparations, Salted, dried, smoked meat, partner: China, Hong Kong, Marketing Year: 2019, all months



# EU Imports of Beef and Live Animals (COMEXT – tonnes cwe)

Origins	2016		2017		2018		2019		Jan-Dec 20		Compared to Jan-Dec 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	100 982	37.1%	87 157	33.5%	103 979	36.1%	99 569	35.7%	84 172	35.0%	- 15.5%
Argentina	43 112	15.8%	49 259	18.9%	69 011	24.0%	70 618	25.3%	72 796	30.3%	+ 3.1%
Uruguay	52 896	19.4%	55 212	21.2%	48 712	16.9%	40 483	14.5%	34 596	14.4%	- 14.5%
USA	20 290	7.5%	21 624	8.3%	19 268	6.7%	16 852	6.0%	16 516	6.9%	- 2.0%
Australia	21 909	8.1%	18 193	7.0%	17 368	6.0%	16 516	5.9%	10 998	4.6%	- 33.4%
New Zealand	8 275	3.0%	6 806	2.6%	7 165	2.5%	6 726	2.4%	6 101	2.5%	- 9.3%
Switzerland	5 496	2.0%	5 138	2.0%	5 437	1.9%	4 433	1.6%	4 325	1.8%	- 2.4%
Paraguay	5 309	2.0%	5 922	2.3%	5 520	1.9%	5 203	1.9%	4 234	1.8%	- 18.6%
Canada	392	0.1%	512	0.2%	1 343	0.5%	2 518	0.9%	1 550	0.6%	- 38.4%
Namibia	6 282	2.3%	5 043	1.9%	3 442	1.2%	7 706	2.8%	1 445	0.6%	- 81.3%
Serbia	557	0.2%	565	0.2%	1 134	0.4%	1 062	0.4%	971	0.4%	- 8.6%
Botswana	4 205	1.5%	2 686	1.0%	3 119	1.1%	4 950	1.8%	788	0.3%	- 84.1%
Japan	518	0.2%	645	0.2%	791	0.3%	997	0.4%	722	0.3%	- 27.6%
Norway	276	0.1%	389	0.1%	153	0.1%	129	0.0%	395	0.2%	+++
Chile	575	0.2%	319	0.1%	356	0.1%	392	0.1%	168	0.1%	- 57.1%
Ukraine	317	0.1%	374	0.1%	257	0.1%	411	0.1%	134	0.1%	- 67.4%
Other Destinations	705	0.3%	651	0.2%	733	0.3%	643	0.2%	481	0.2%	
<b>Total (without UK)</b>	<b>272 094</b>		<b>260 496</b>		<b>287 788</b>		<b>279 208</b>		<b>240 393</b>		
% change			- 4%		+ 10%		- 3%		- 13.9%		
United Kingdom	134 098		133 587		138 496		160 509		122 807 up to Nov 20		#N/A

# EU Exports/Import of Beef and Live Animals to/from UK (COMEXT – tonnes cwe)

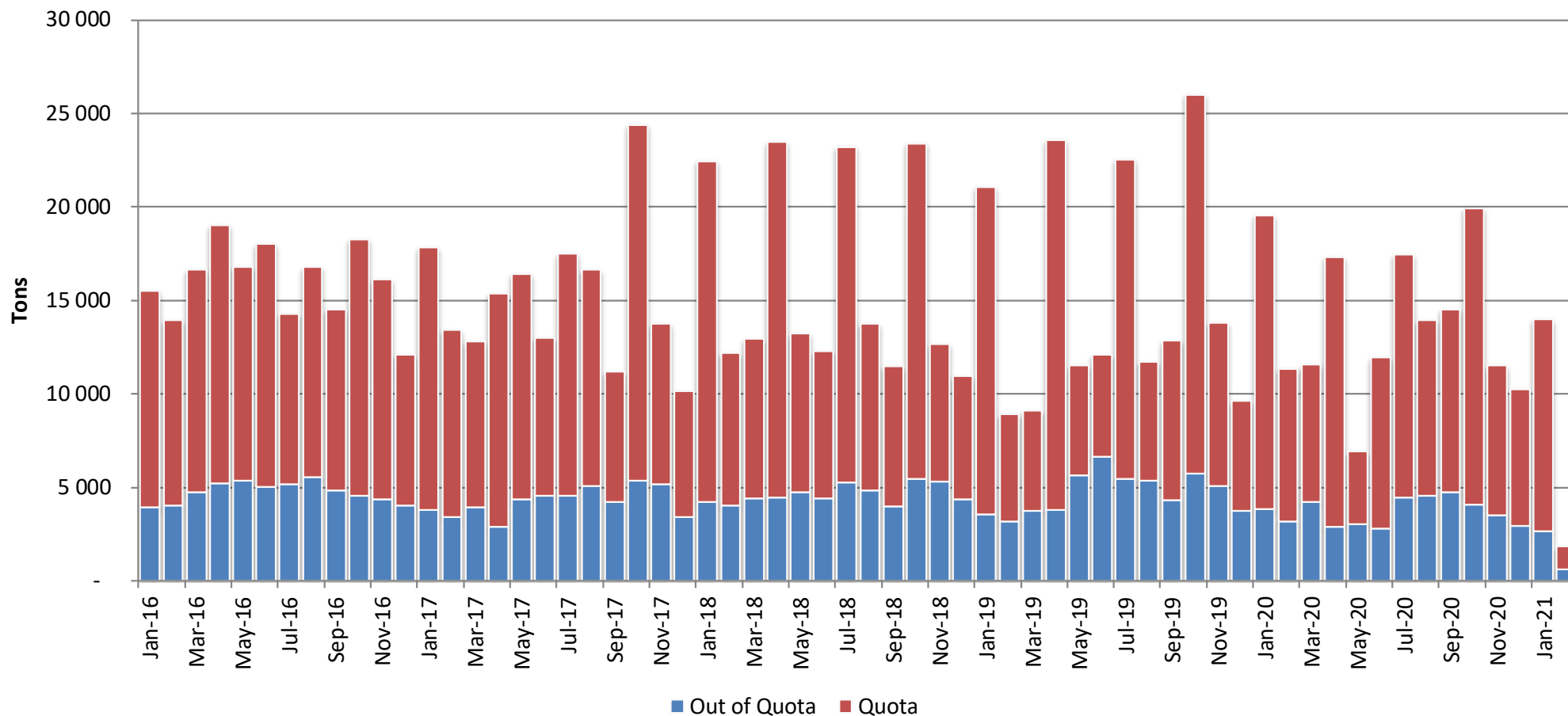
	Exports		Imports	
	Jan-Nov 2019	Jan-Nov 2020	Jan-Nov 2019	Jan-Nov 2020
Live animals	18 459	22 018	3 741	3 284
Beef	322 352	312 262	124 520	101 809
Total	340 811	334 280	128 261	105 093

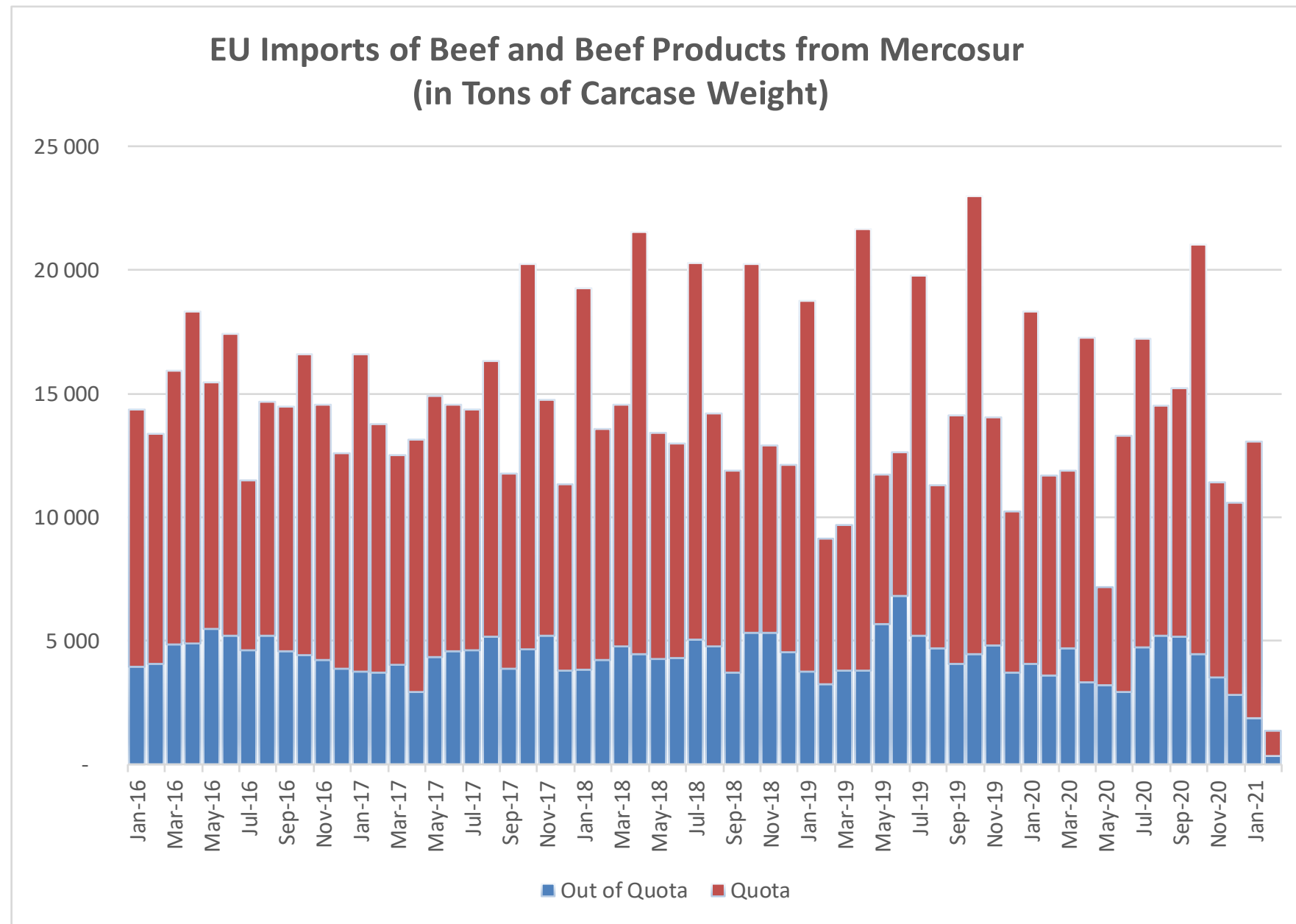
# UK Exports/Import of Beef and Live Animals to/from outside EU (COMEXT – tonnes cwe)

	Exports		Imports	
	Jan-Nov 2019	Jan-Nov 2020	Jan-Nov 2019	Jan-Nov 2020
Live animals	46	15	5	0
Beef	42 175	45 647	10 118	4 201
Total	42 221	45 662	10 123	4 201

# Imports in and out of TRQs

## EU Imports of Beef and Beef Products from Third Countries







# High quality beef import quotas

## Hilton Quota

## Regulation (EU) N° 593/2013

	Quantity allocated (Tons)	2018/2019		2019/2020		2020/2021*	
		Use		Use		Use	
09.4001 Australia	2 250						
09.4004 Argentina	200	11.05	5.53%	8.34	4.17%	1.46	0.73%
09.4450 Argentina	29 500	29 491.35	99.97%	26 649.20	90.34%	15 299.05	51.86%
09.4451 Australia	7 150	4 942.02	69.12%	3 000.01	41.96%	943.11	13.19%
09.4452 Uruguay	6 376	6 363.76	99.81%	4 520.57	70.90%	3 435.21	53.88%
09.4453 Brazil	10 000	4 147.19	41.47%	2 884.79	28.85%	1 855.63	18.56%
09.4454 New Zealand	1 300	980.60	75.43%	859.15	66.09%	429.82	33.06%
09.4002 Canada/US	11 500	3 883.04	33.77%	2 703.68	23.51%	940.25	8.18%
09.4455 Paraguay	1 000	935.41	93.54%	680.40	68.04%	365.33	36.53%
Total Beef	66 826	50 743.37	75.93%	41 297.80	61.80%	23 268.40	34.82%
Total Buffalo	2 450	11.05	0.45%	8.34	0.34%	1.46	0.06%
Total	69 276	50 754.42	73.26%	41 306.14	59.63%	23 269.86	33.59%

\* up to 31/12/2020

Origin	GATT 2019-2020				
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	Total
United States			4 149	1 873	6 022
Available			4 625	4 625	9 250
Use			89,70%	40,50%	65,10%
After transfer				5 101	
Use				36,72%	

Origin	GATT 2019-2020				
	2020-Q3	2020-Q4	2021-Q1*	2021-Q2	Total
United States	3 680	3 132	982	-	7 794
Available	4 625	4 625	5 750	5 750	20 750
Use	79,57%	67,72%	17,08%		37,56%
After transfer	4 625	5 570	7 243		
Use		56,23%	13,56%		

## Quota erga omnes

Order n° 09.2202

Origin

## Regulation (EU) No 481/2012

GATT 2018-2019

	2018-Q3	2018-Q4	2019-Q1	2019-Q2	Total
Australia	2 400	2 236	2 500	2 855	9 991
Canada	-	-	-	1	1
New Zealand	127	189	194	156	666
US	3 001	3 364	3 428	2 836	12 628
Uruguay	3 643	3 767	3 204	3 621	14 235
Argentina	1 994	1 744	1 647	1 787	7 173
Total import within Quota	11 165	11 300	10 973	11 256	44 693
Available	11 250	11 250	11 250	11 250	45 000
Use	99.24%	100.00%	97.53%	100.00%	99.32%
After transfer	11 250	11 335	11 200	11 527	
Use	99.24%	99.69%	97.97%	97.64%	

## Origin GATT 2019-2020

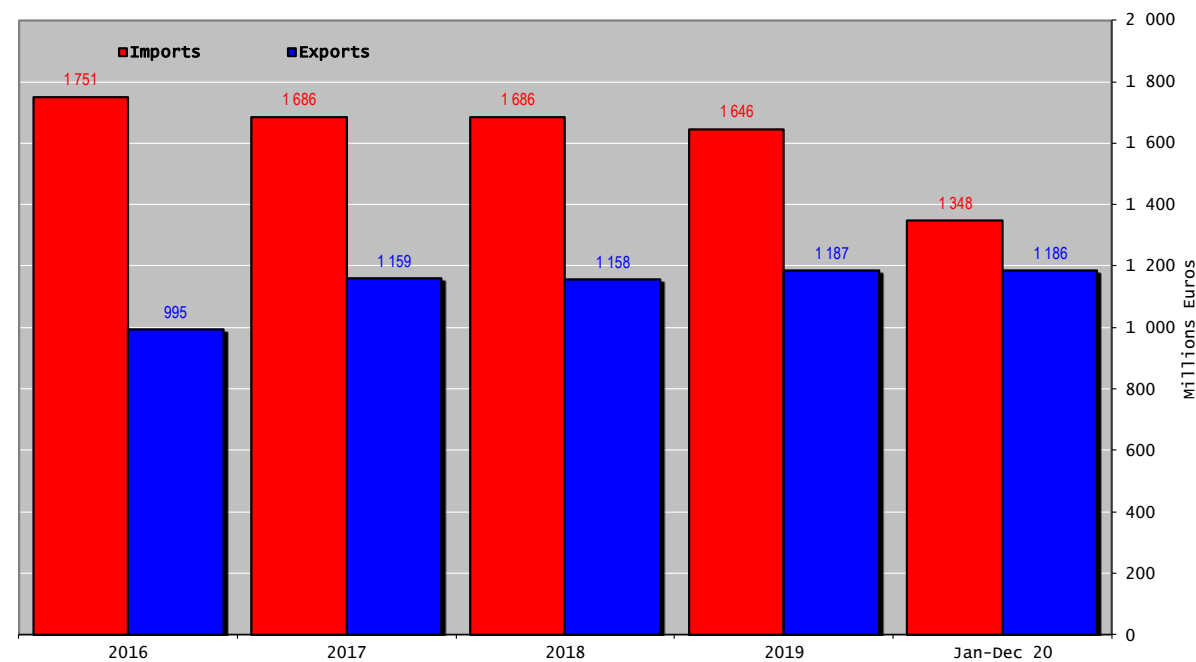
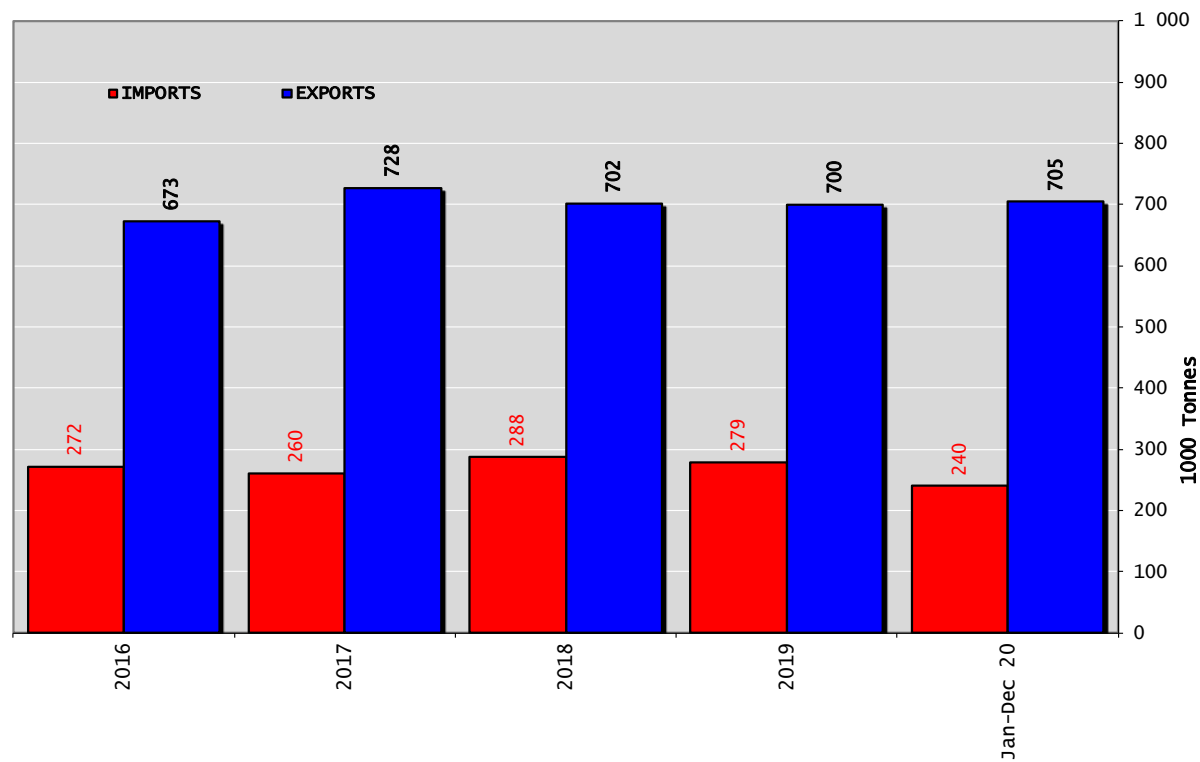
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	Total
Australia	2 843	2 438	2 045	1 965	9 291
Canada	3	-	-	-	3
New Zealand	174	157	163	123	618
US	2 638	2 433	-	-	5 071
Uruguay	3 445	3 828	2 690	2 679	12 642
Argentina	2 143	2 403	1 778	1 959	8 284
Total import within Quota	11 246	11 259	6 677	6 726	35 909
Available	11 250	11 250	6 625	6 625	35 750
Use	99.97%	100.00%	100.00%	100.00%	100.00%
After transfer	11 250	11 254	6 616	6 573	
Use	99.97%	100.00%	100.00%	100.00%	

## Origin GATT 2020-2021

	2020-Q3	2020-Q4	2021-Q1*	2021-Q2	Total
Australia	1 953	1 157	1 490	-	4 599
Canada	-	-	4	-	4
New Zealand	6	100	57	-	163
Uruguay	2 835	3 391	2 936	-	9 161
Argentina	1 859	1 894	723	-	4 476
Total import within Quota *	6 652	6 542	5 209	-	18 403
Available	6 625	6 625	5 500	5 500	24 250
Use	100.00%	98.75%	94.71%		75.89%
After transfer	6 625	6 598	5 583		
Use	100.00%	99.16%	93.30%		

\* Until 11.02.2021

# EU Trade Balance of beef and live animals



# Thank you



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