



BEEF & VEAL MARKET SITUATION



Civil Dialogue Group – Animal Production

29 September 2023

LIVESTOCK

JUNE SURVEY

EU EVOLUTION TOTAL BOVINE

May/Jun 1000 Hd	TOT LIVESTOCK				%Var 2023 2022	BOVINE < 1 Year				%Var 2023 2022	BOVINE 1-2 Year				%Var 2023 2022	BOVINE > 2 Year				%Var 2023 2022
	2020	2021	2022	2023		2020	2021	2022	2023		2020	2021	2022	2023		2020	2021	2022	2023	
BE	2 388	2 353	2 241	2 294	+2.4%	716	712	656	681	+3.7%	471	473	463	459	-1.0%	1 201	1 169	1 121	1 155	+3.0%
BG																				
CZ																				
DK	1 517	1 503	1 484	1 454	-2.1%	517	517	510	498	-2.4%	291	287	290	281	-2.9%	709	699	684	674	-1.4%
DE	11 423	11 176	10 986	10 937	-0.5%	3 410	3 398	3 296	3 260	-1.1%	2 683	2 591	2 620	2 595	-0.9%	5 330	5 188	5 071	5 082	+0.2%
EE																				
IE	7 314	7 359	7 396	7 341	-0.7%	2 117	2 146	2 134	2 074	-2.8%	1 807	1 910	1 949	1 922	-1.4%	3 390	3 303	3 313	3 346	+1.0%
EL																				
ES	6 715	6 923	6 754	6 529	-3.3%	2 488	2 634	2 569	2 410	-6.2%	930	973	902	926	+2.6%	3 297	3 316	3 283	3 192	-2.7%
FR	18 200	17 863	17 416	17 039	-2.2%	5 144	5 134	4 949	4 838	-2.2%	3 249	3 158	3 144	3 077	-2.2%	9 808	9 571	9 323	9 125	-2.1%
HR																				
IT	6 116	6 174	6 087	5 975	-1.8%	1 746	1 762	1 725	1 663	-3.6%	1 458	1 476	1 475	1 439	-2.4%	2 912	2 936	2 887	2 873	-0.5%
CY																				
LV																				
LT																				
LU																				
HU																				
MT																				
NL	3 766	3 732	3 766	3 749	-0.5%	1 558	1 523	1 546	1 506	-2.6%	446	479	493	506	+2.6%	1 762	1 729	1 726	1 736	+0.6%
AT	1 844	1 846	1 842	1 826	-0.9%	588	596	592	574	-3.1%	416	413	422	426	+0.9%	841	838	828	826	-0.2%
PL	6 344	6 401	6 444	6 354	-1.4%	1 729	1 789	1 916	1 855	-3.2%	1 796	1 856	1 674	1 670	-0.2%	2 819	2 756	2 855	2 828	-0.9%
PT	1 751	1 723	1 680	1 608	-4.3%	557	550	554	511	-7.9%	264	252	229	229	+0.2%	929	922	897	868	-3.3%
RO	1 915	1 864	1 852	1 833	-1.0%	418	386	379	370	-2.3%	217	207	220	224	+1.8%	1 280	1 271	1 254	1 239	-1.2%
SI																				
SK																				
FI																				
SE	1 453	1 453	1 449	1 444	-0.3%	462	465	458	458	+0.2%	362	369	374	371	-1.0%	629	619	617	615	-0.3%
EU	70 747	70 371	69 398	68 382	-1.5%	21 451	21 612	21 285	20 698	-2.8%	14 389	14 444	14 255	14 124	-0.9%	34 907	34 315	33 858	33 560	-0.9%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2022 AND 2023

LIVESTOCK

JUNE SURVEY

EU EVOLUTION TOTAL BOVINE

May/Jun 1000 Hd	TOTAL COWS				%Var 2023 2022	DAIRY COWS				%Var 2023 2022	OTHER COWS				%Var 2023 2022
	2020	2021	2022	2023		2020	2021	2022	2023		2020	2021	2022	2023	
BE	954	937	902	923	+2.3%	544	539	527	543	+3.1%	409	399	375	380	+1.1%
BG															
CZ															
DK	653	647	634	625	-1.4%	567	565	557	553	-0.7%	86	82	77	72	-6.7%
DE	4 609	4 517	4 430	4 399	-0.7%	3 969	3 892	3 817	3 775	-1.1%	640	626	612	623	+1.8%
EE															
IE	2 551	2 545	2 541	2 519	-0.9%	1 568	1 605	1 627	1 647	+1.2%	983	940	913	872	-4.5%
EL															
ES	2 927	2 987	2 951	2 878	-2.5%	810	828	816	791	-3.1%	2 117	2 159	2 135	2 087	-2.2%
FR	7 442	7 315	7 159	6 960	-2.8%	3 403	3 331	3 266	3 167	-3.0%	4 039	3 984	3 893	3 793	-2.6%
HR															
IT	2 130	2 161	2 130	2 123	-0.3%	1 844	1 852	1 821	1 798	-1.3%	286	309	309	325	+5.1%
CY															
LV															
LT															
LU															
HU															
MT															
NL	1 651	1 627	1 623	1 628	+0.3%	1 593	1 571	1 571	1 576	+0.3%	58	56	53	52	-1.4%
AT	716	715	710	704	-0.8%	523	531	549	546	-0.6%	193	184	161	158	-1.6%
PL	2 468	2 388	2 208	2 160	-2.2%	2 218	2 113	2 072	2 027	-2.2%	250	276	136	133	-1.7%
PT	757	757	742	718	-3.2%	239	236	227	224	-1.2%	517	521	515	494	-4.0%
RO	1 160	1 148	1 135	1 111	-2.1%	1 145	1 133	1 119	1 091	-2.4%	15	15	16	20	+23.5%
SI															
SK															
FI															
SE	510	512	510	506	-0.7%	303	302	297	295	-0.5%	207	210	213	211	-1.0%
EU	28 528	28 256	27 674	27 254	-1.5%	18 727	18 497	18 266	18 033	-1.3%	9 801	9 760	9 409	9 221	-2.0%

Source : EStat Newcronos

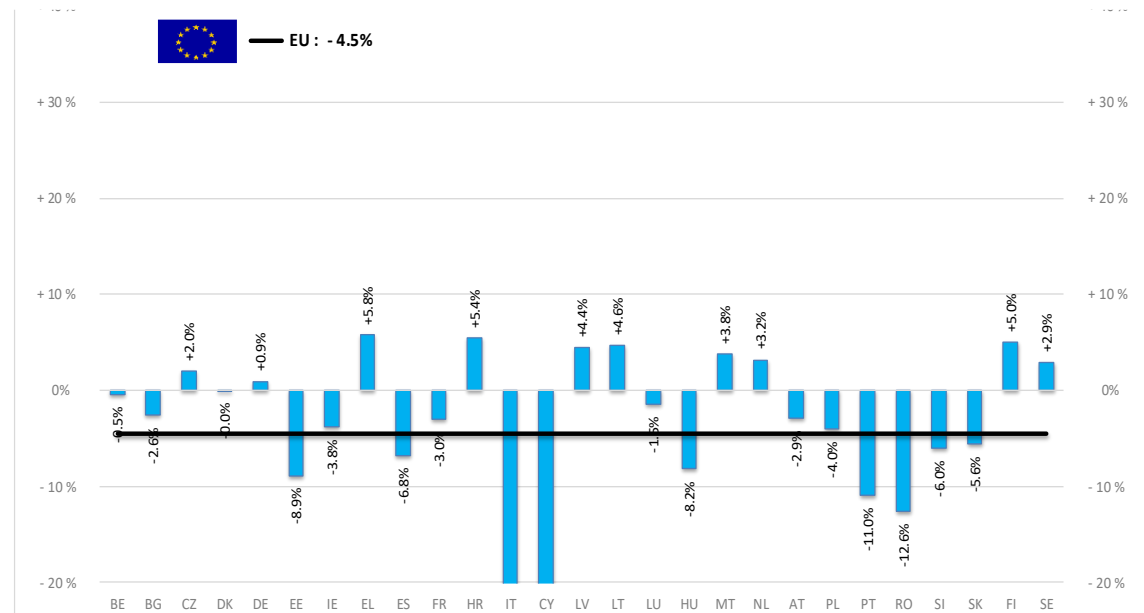
EU %Var is calculated considering only countries available in 2022 AND 2023

PRODUCTION % EVOLUTION

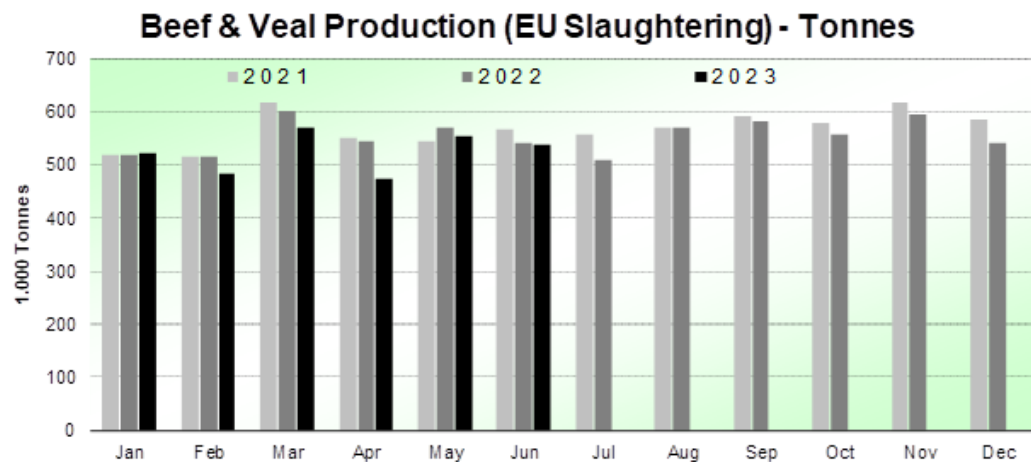
HEADS	Jan-Jun 23/22	TONNES	Jan-Jun 23/22
	EU		EU
Bull	-4.0%	Bull	-3.8%
Bullock	-1.2%	Bullock	-2.4%
Cow	-3.7%	Cow	-3.9%
Heifer	-3.3%	Heifer	-6.0%
Calve	-3.6%	Calve	-6.4%
Young cattle	-4.1%	Young cattle	-6.4%
Meat of bovine animals	-3.6%	Meat of bovine animals	-4.5%

Estimates for last month of period :

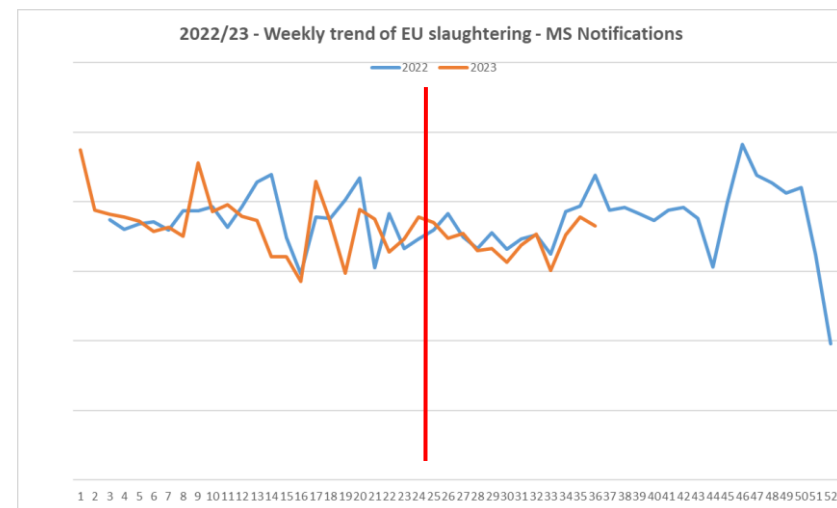
Estimates for last month of period :



Source : EStat - Newcronos



Source : EStat-Newcronos



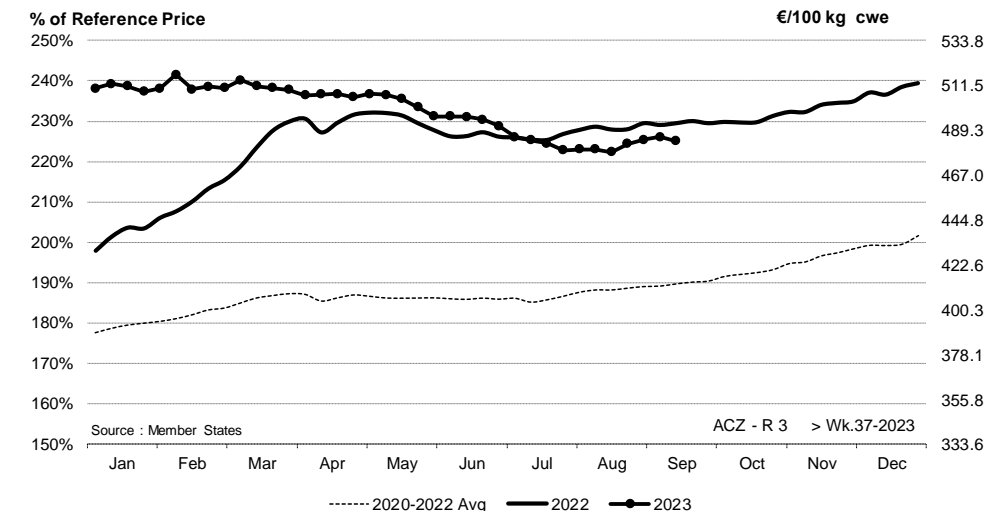
Sources : Member State notifications – Reg.2017/1185

PRICES CARCASSES

EVOLUTION A/C/Z.R3

EU Prices week		37	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z-R3	483.9	€/100 kg	- 0.4%	+ 1.1%	- 1.8%
	Young Bovines (Z)	490.4		- 1.4%	- 1.3%	+ 0.1%
	Young Bulls (A)	481.8		- 0.3%	+ 1.8%	- 2.4%
	Steers (C)	486.8		+ 0.4%	+ 1.1%	- 1.0%
	Cows (D)	411.0		- 0.9%	+ 0.3%	- 6.5%
	Heifers (E)	503.4		- 0.4%	+ 0.9%	- 0.5%
	Calves slaughtered <8M	593.5		+ 0.2%	- 9.0%	- 1.5%
Live Animals	Male Calves Dairy Type	118.5	€/head	- 0.6%	- 6.8%	+ 9.9%
	Male Calves Beef Type	250.0		- 1.0%	- 3.0%	+ 6.8%
	Young Store Cattle	3.24	€/kg	+ 0.9%	+ 3.1%	+ 4.6%
	Yearling Male Store Cattle	3.62		+ 3.3%	+ 0.7%	+ 4.2%
	Yearling Female Store Cattle	2.82		+ 0.2%	- 1.9%	+ 0.1%

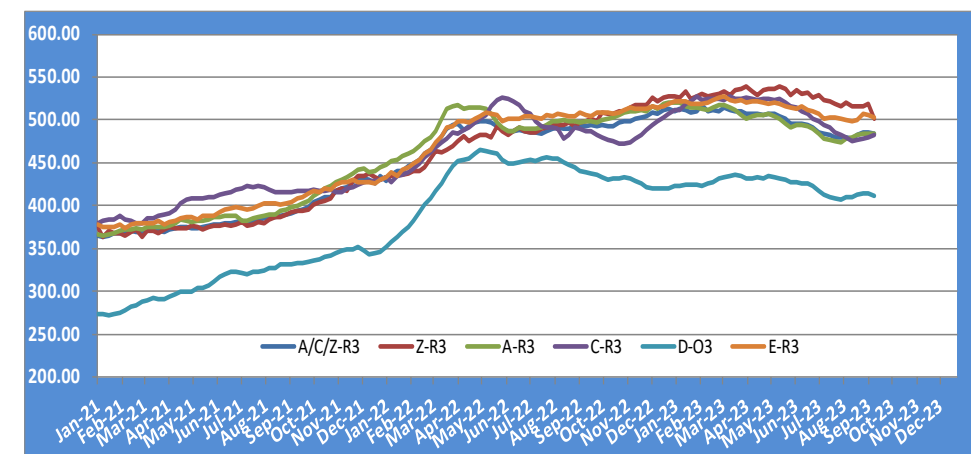
ACZ - R 3 > Wk.37-2023



Price in week 37 : **483.92**
 % change y/y : **- 1.80%**
 % Ref. Price in wk 0 : **217.6%**

Average price in August 2023 : **480.82**
 % change y/y : **- 1.93%**

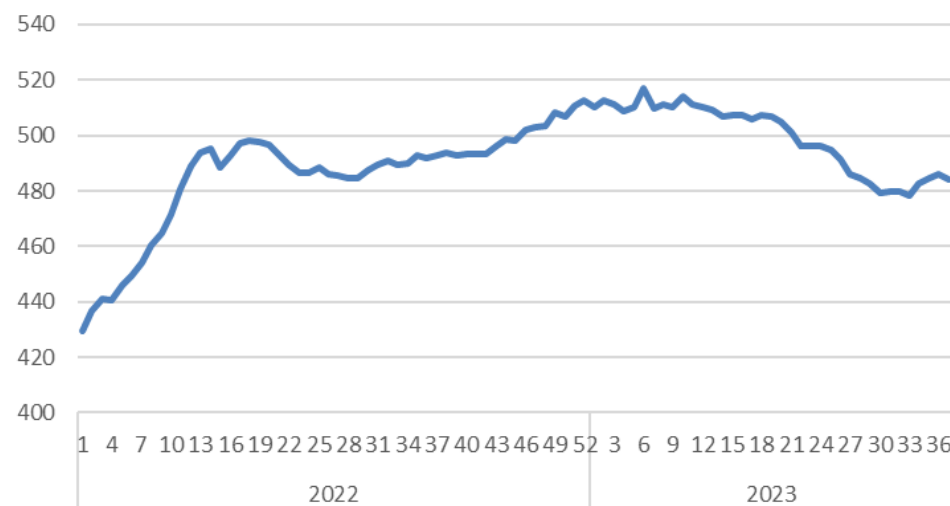
EU EVOLUTION ALL CAT GLOBAL VIEW



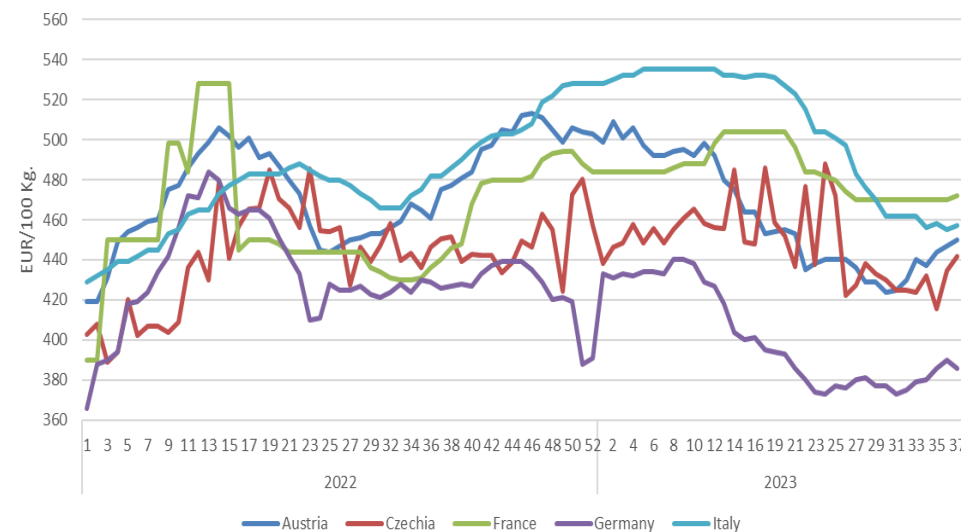
Sources : MSs notifications (Regulation (EU) 1182/2017 and 1184/2017)

Price development along the chain

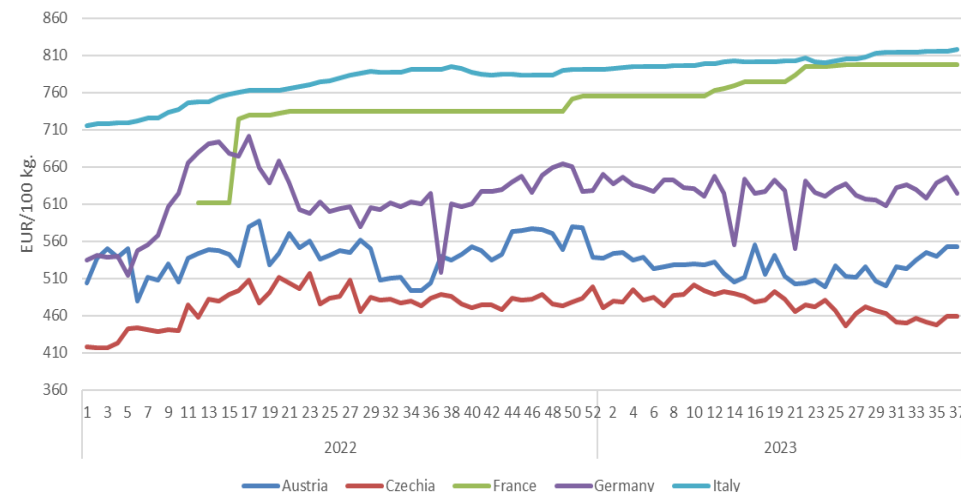
Evolution of bovine reference price



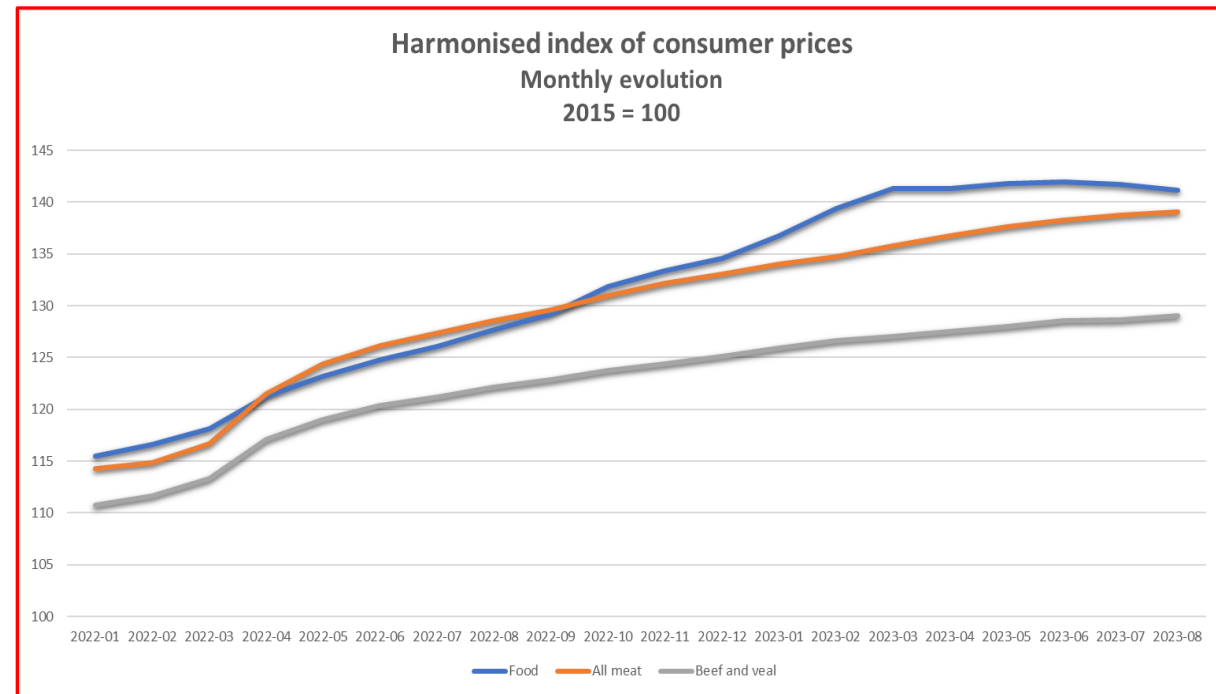
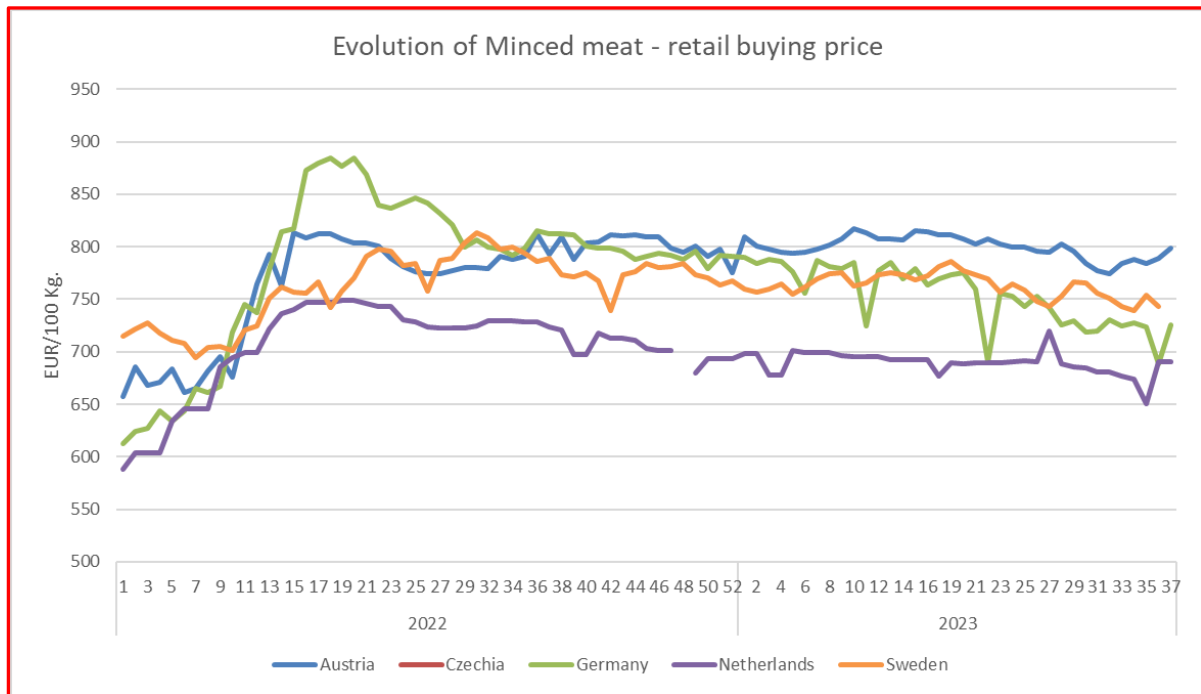
Evolution of forequarter selling price



Evolution of hindquarter selling price



Price development along the chain



Sources : Member State notifications – Reg.2017/1185 and EUROSTAT.
PRELIMINARY DATA SUBJECT TO CHANGES

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	2021		2022		Jan to Jun 2023		Compared to Jan to Jun 2022
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	344,633	33.4%	360,535	38.5%	177,398	38.5%	+0.9%
Turkey	14,953	1.5%	13,452	1.4%	42,850	9.3%	+++
Israel	66,022	6.4%	63,598	6.8%	27,913	6.1%	-9.7%
Bosnia-Herz.	40,504	3.9%	38,801	4.1%	19,960	4.3%	+14.9%
Ghana	47,618	4.6%	31,762	3.4%	16,936	3.7%	-13.6%
Ivory Coast	29,187	2.8%	29,879	3.2%	14,169	3.1%	-7.5%
Morocco	11,868	1.2%	8,273	0.9%	11,959	2.6%	+++
Hong Kong	44,769	4.3%	10,494	1.1%	10,936	2.4%	+81.1%
Switzerland	28,717	2.8%	25,000	2.7%	9,840	2.1%	-26.8%
Kosovo	16,478	1.6%	17,086	1.8%	8,816	1.9%	+24.8%
Lebanon	19,527	1.9%	21,042	2.2%	8,634	1.9%	-32.2%
Other Destinations	366,696	35.6%	317,131	33.8%	111,610	24.2%	-32.5%
Extra-EU	1,030,974		937,052		461,021		-1.8%
% Change				-9.1%			

In Thousand Euros

	2021		2022		Jan to Jun 2023		Compared to Jan to Jun 2022
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	1,495,334	38.4%	1,788,823	41.7%	917,082	40.5%	+6.6%
Turkey	86,382	2.2%	96,786	2.3%	294,694	13.0%	+++
Israel	328,295	8.4%	377,934	8.8%	176,174	7.8%	+1.2%
Bosnia-Herz.	126,443	3.3%	161,208	3.8%	87,323	3.9%	+23.1%
Ghana	47,987	1.2%	35,528	0.8%	17,115	0.8%	-21.3%
Ivory Coast	25,645	0.7%	25,506	0.6%	12,101	0.5%	-4.9%
Morocco	60,639	1.6%	48,107	1.1%	71,722	3.2%	+++
Hong Kong	118,737	3.1%	33,178	0.8%	19,357	0.9%	+6.2%
Switzerland	171,272	4.4%	188,978	4.4%	75,436	3.3%	-22.9%
Kosovo	43,776	1.1%	60,917	1.4%	35,893	1.6%	+54.4%
Lebanon	80,664	2.1%	110,119	2.6%	46,536	2.1%	-29.0%
Other Destinations	1,304,359	33.5%	1,364,716	31.8%	513,618	22.7%	-25.0%
Extra-EU	3,889,533		4,291,801		2,267,049		+9.7%
% Change				+10.3%			

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	2021		2022		Jan to Jun 2023		Compared to Jan to Jun 2022
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	87,599	28.3%	142,454	37.0%	54,037	30.5%	-15.9%
Brazil	81,737	26.4%	86,551	22.5%	47,731	26.9%	+6.2%
Argentina	52,300	16.9%	62,605	16.3%	30,844	17.4%	+11.3%
Uruguay	42,669	13.8%	37,669	9.8%	19,858	11.2%	-2.9%
USA	14,910	4.8%	17,269	4.5%	8,993	5.1%	+10.3%
Australia	8,925	2.9%	8,385	2.2%	3,279	1.8%	-16.3%
Namibia	1,996	0.6%	5,168	1.3%	3,098	1.7%	+82.8%
Paraguay	3,933	1.3%	5,404	1.4%	2,735	1.5%	+8.2%
New Zealand	4,380	1.4%	5,527	1.4%	2,395	1.4%	-7.9%
Switzerland	4,714	1.5%	4,729	1.2%	1,616	0.9%	-14.3%
Canada	1,816	0.6%	2,176	0.6%	814	0.5%	-11.9%
Other Destinations	4,290	1.4%	7,171	1.9%	1,862	1.1%	-52.1%
Extra-EU	309,270		385,107		177,261		-3.1%
% Change				+24.5%			

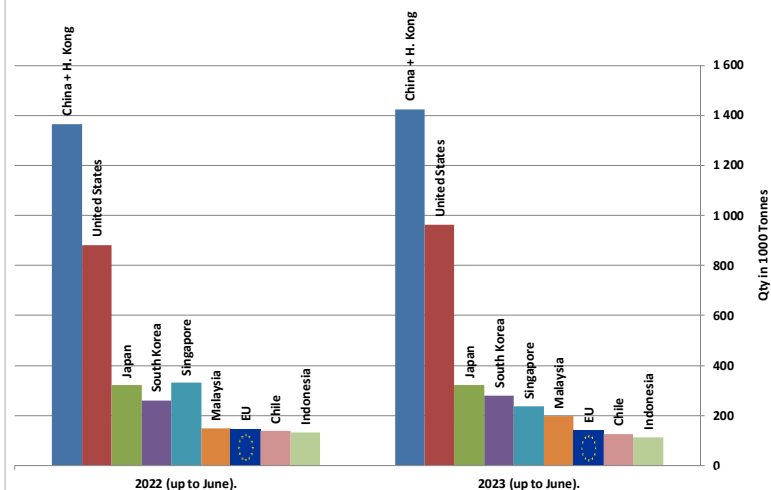
In Thousand Euros

	2021		2022		Jan to Jun 2023		Compared to Jan to Jun 2022
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	360,517	20.2%	569,534	22.4%	257,358	21.6%	-5.9%
Brazil	387,194	21.7%	542,614	21.4%	272,862	22.9%	+5.7%
Argentina	376,658	21.1%	550,718	21.7%	247,936	20.8%	-1.5%
Uruguay	246,910	13.8%	321,519	12.7%	149,693	12.6%	-6.4%
USA	156,708	8.8%	214,772	8.5%	115,517	9.7%	+18.1%
Australia	90,481	5.1%	101,737	4.0%	40,841	3.4%	-9.1%
Namibia	6,902	0.4%	24,570	1.0%	12,579	1.1%	+75.1%
Paraguay	20,419	1.1%	35,579	1.4%	15,484	1.3%	-5.3%
New Zealand	31,669	1.8%	50,317	2.0%	25,148	2.1%	+19.1%
Switzerland	53,477	3.0%	55,346	2.2%	18,010	1.5%	-19.9%
Canada	18,559	1.0%	21,873	0.9%	10,641	0.9%	+15.3%
Other Destinations	37,331	2.1%	52,847	2.1%	23,281	2.0%	-5.2%
Extra-EU	1,786,825		2,541,424		1,189,349		+0.2%
% Change				+42.2%			

WORLD BEEF MARKET

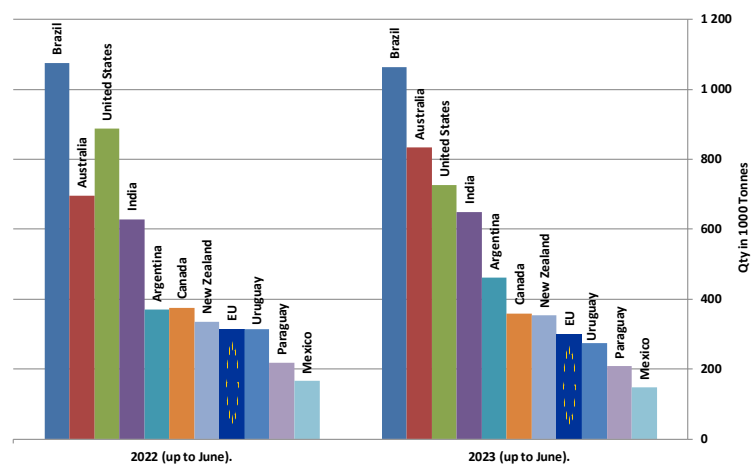
Main Importers of BEEF Products (up to June).

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

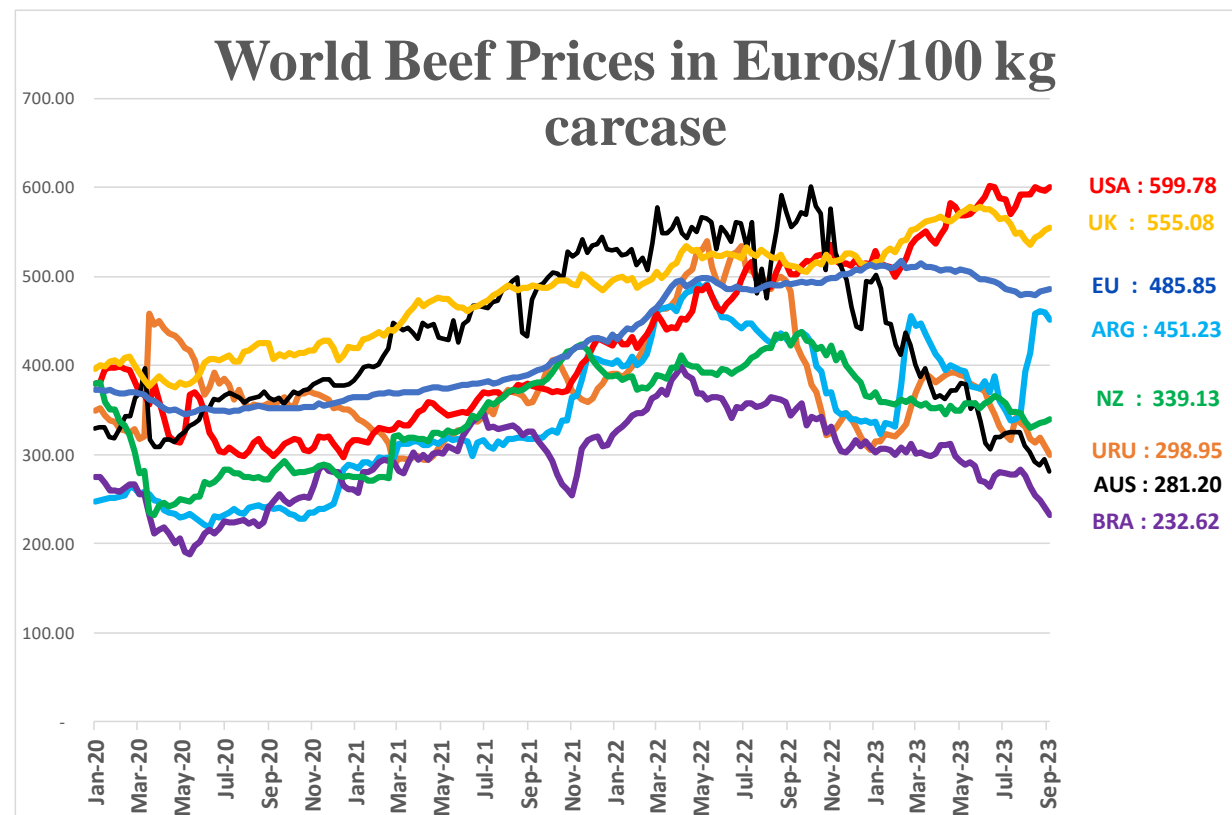


Main Exporters of BEEF Products (up to June).

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



World Beef Prices in Euros/100 kg carcasse



Outcomes of the replies to the questionnaires

	2021	2022	2023	2024
EU PRODUCTION (1000T)	- 0.30% 6 802	- 2.38% 6 640	+ 6.00% 7 039	+ 0.25% 7 056
CONSUMPTION (1000T)	- 6.39% 5 890	- 2.90% 5 719	- 2.20% 5 593	- 1.20% 5 526
BALANCE	912	921	1 446	1 530
EU - CARCASS PRICES	2021	2022	2023	2024
ADULT MALE BOVINES (€/100 kg)	↑	↓	↑	↓
COWS (€/100 kg)	↑	↑	↓	↓

Sources : EStat New Cronos, Member States

- Data only from 9 MS
- Too many estimations
- Need to rethink for the next meetings

Thank you



© European Union 2020

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](https://creativecommons.org/licenses/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

