



# BEEF & VEAL MARKET SITUATION



Civil Dialog Group  
16 November 2017

# EU PRODUCTION

16 November 2017

# LIVESTOCK

# EU EVOLUTION TOTAL BOVINE

JUNE SURVEY



European  
Commission

May/Jun 1000 Hd	TOT LIVESTOCK				%Var 2017 2016	BOVINE < 1 Year				%Var 2017 2016	BOVINE 1-2 Year				%Var 2017 2016	BOVINE > 2 Year				%Var 2017 2016
	2014	2015	2016	2017		2014	2015	2016	2017		2014	2015	2016	2017		2014	2015	2016	2017	
BE	2 521	2 531	2 555	2 454	-3.9%	734	744	750	717	-4.5%	506	504	512	500	-2.2%	1 282	1 283	1 293	1 237	-4.3%
BG																				
CZ																				
DK	1 585	1 568	1 583	1 565	-1.1%	528	524	547	527	-3.7%	318	316	307	311	+1.3%	739	728	730	727	-0.4%
DE	12 702	12 653	12 563	12 366	-1.6%	3 874	3 846	3 805	3 723	-2.2%	3 004	3 002	2 983	2 948	-1.2%	5 824	5 805	5 775	5 694	-1.4%
EE																				
IE	6 926	6 964	7 221	7 364	+2.0%	1 878	2 042	2 126	2 131	+0.2%	1 767	1 705	1 853	1 914	+3.3%	3 280	3 216	3 242	3 319	+2.4%
EL																				
ES	6 008	6 234	6 451	6 588	+2.1%	2 172	2 281	2 413	2 480	+2.7%	795	898	896	927	+3.5%	3 041	3 055	3 141	3 181	+1.3%
FR	19 286	19 463	19 559	19 433	-0.6%	5 530	5 603	5 638	5 542	-1.7%	3 476	3 540	3 561	3 523	-1.1%	10 280	10 319	10 362	10 367	+0.1%
HR																				
IT	6 197	6 146	6 183	6 118	-1.0%	1 703	1 670	1 702	1 723	+1.2%	1 445	1 370	1 502	1 472	-2.0%	3 049	3 107	2 979	2 923	-1.9%
CY																				
LV																				
LT																				
LU																				
HU																				
MT																				
NL	4 068	4 134	4 245	4 093	-3.6%	1 643	1 624	1 692	1 602	-5.3%	634	672	630	600	-4.7%	1 791	1 838	1 923	1 892	-1.7%
AT	1 937	1 950	1 933	1 938	+0.3%	613	622	605	620	+2.4%	424	437	441	431	-2.3%	901	891	887	888	+0.2%
PL	5 920	5 961	5 939	6 143	+3.4%	1 609	1 669	1 728	1 721	-0.4%	1 433	1 529	1 576	1 701	+7.9%	2 879	2 763	2 635	2 721	+3.3%
PT			1 664	1 722	+3.5%			521	537	+3.0%			264	281	+6.6%			879	904	+2.8%
RO	2 069	2 078	2 081	2 012	-3.3%	479	477	481	454	-5.5%	236	235	240	229	-4.6%	1 354	1 366	1 360	1 329	-2.3%
SI																				
SK																				
FI																				
SE	1 493	1 476	1 489	1 501	+0.8%	472	466	475	472	-0.6%	370	372	375	385	+2.6%	651	638	639	644	+0.9%
UK	9 837	9 919	10 033	9 997	-0.4%	2 801	2 912	2 989	2 940	-1.6%	2 384	2 380	2 474	2 516	+1.7%	4 652	4 626	4 569	4 541	-0.6%
EU	80 550	81 076	83 499	83 294	-0.2%	24 035	24 481	25 473	25 189	-1.1%	16 792	16 959	17 613	17 739	+0.7%	39 722	39 635	40 414	40 366	-0.1%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2016 AND 2017

16 November 2017

Agriculture  
and Rural  
Development

# LIVESTOCK

# EU EVOLUTION TOTAL BOVINE

JUNE SURVEY



European  
Commission

May/Jun 1000 Hd	TOTAL COWS				%Var 2017 2016	DAIRY COWS				%Var 2017 2016	OTHER COWS				%Var 2017 2016
	2014	2015	2016	2017		2014	2015	2016	2017		2014	2015	2016	2017	
BE	971	987	1 005	970	-3.5%	522	524	536	521	-2.7%	449	463	469	449	-4.3%
BG															
CZ															
DK	664	661	669	665	-0.6%	563	561	572	570	-0.3%	101	99	97	95	-2.1%
DE	4 981	4 969	4 957	4 885	-1.5%	4 311	4 287	4 272	4 214	-1.4%	670	682	685	670	-2.1%
EE															
IE	2 355	2 372	2 502	2 514	+0.5%	1 226	1 296	1 398	1 433	+2.5%	1 129	1 076	1 104	1 081	-2.1%
EL															
ES	2 716	2 678	2 801	2 832	+1.1%	876	853	827	825	-0.3%	1 840	1 825	1 973	2 007	+1.7%
FR	7 759	7 809	7 838	7 811	-0.3%	3 615	3 606	3 576	3 552	-0.7%	4 144	4 203	4 263	4 259	-0.1%
HR															
IT	2 382	2 375	2 245	2 187	-2.6%	2 053	2 061	1 948	1 907	-2.1%	329	314	297	280	-5.9%
CY															
LV															
LT															
LU															
HU															
MT															
NL	1 655	1 702	1 811	1 751	-3.3%	1 572	1 622	1 743	1 693	-2.9%	82	80	68	59	-13.8%
AT	770	762	755	755	+0.0%	534	540	536	540	+0.7%	236	222	218	215	-1.6%
PL	2 479	2 444	2 332	2 374	+1.8%	2 310	2 279	2 146	2 154	+0.4%	169	165	186	220	+18.3%
PT			736	747	+1.5%			246	244	-0.9%			490	504	+2.7%
RO	1 224	1 233	1 228	1 199	-2.3%	1 207	1 216	1 216	1 184	-2.6%	17	17	12	15	+28.3%
SI															
SK															
FI															
SE	531	523	524	530	+1.0%	344	338	331	322	-2.7%	186	184	194	208	+7.2%
UK	3 411	3 472	3 493	3 481	-0.3%	1 841	1 895	1 897	1 891	-0.3%	1 569	1 576	1 596	1 589	-0.4%
EU	31 899	31 987	32 895	32 700	-0.6%	20 976	21 078	21 243	21 049	-0.9%	10 922	10 907	11 652	11 650	-0.0%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2016 AND 2017

16 November 2017

Agriculture  
and Rural  
Development

# LIVESTOCK

# EU EVOLUTION TOTAL BOVINE

DECEMBER SURVEY



European  
Commission

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2016 2015	BOVINE < 1 Year				%Var 2016 2015	BOVINE 1-2 Year				%Var 2016 2015	BOVINE > 2 Year				%Var 2016 2015
	2013	2014	2015	2016		2013	2014	2015	2016		2013	2014	2015	2016		2013	2014	2015	2016	
BE	2 441	2 477	2 503	2 499	-0.2%	718	745	749	748	-0.1%	490	490	493	491	-0.4%	1 234	1 243	1 261	1 259	-0.2%
BG	586	562	561	571	+1.8%	150	121	109	120	+10.2%	62	65	64	63	-1.0%	374	376	388	388	-0.0%
CZ	1 332	1 373	1 366	1 340	-2.0%	390	413	403	397	-1.6%	300	311	309	295	-4.6%	642	649	654	648	-0.9%
DK	1 583	1 553	1 566	1 554	-0.8%	528	534	538	540	+0.4%	319	307	302	298	-1.3%	736	713	726	715	-1.5%
DE	12 686	12 742	12 635	12 467	-1.3%	3 878	3 909	3 836	3 795	-1.1%	3 015	3 011	2 993	2 960	-1.1%	5 793	5 823	5 806	5 712	-1.6%
EE	261	265	256	249	-3.0%	71	73	70	68	-3.6%	54	54	53	50	-4.6%	137	138	133	131	-2.1%
IE	6 309	6 243	6 422	6 613	+3.0%	1 893	1 886	2 026	2 077	+2.5%	1 714	1 649	1 660	1 778	+7.1%	2 701	2 709	2 737	2 759	+0.8%
EL	653	659	582	580	-0.3%	167	176	154	151	-1.9%	129	119	103	107	+3.9%	357	365	325	324	-0.3%
ES	5 802	6 079	6 183	6 255	+1.2%	2 068	2 302	2 325	2 360	+1.5%	735	746	786	795	+1.1%	2 999	3 031	3 072	3 099	+0.9%
FR	19 129	19 271	19 406	19 004	-2.1%	5 453	5 546	5 618	5 138	-8.5%	3 441	3 418	3 461	3 493	+0.9%	10 235	10 307	10 327	10 372	+0.4%
HR	442	441	455	462	+1.5%	145	132	148	154	+4.1%	92	88	88	89	+1.1%	205	221	219	219	idem
IT	6 249	6 125	6 156	6 315	+2.6%	1 680	1 654	1 678	1 745	+4.0%	1 457	1 366	1 379	1 448	+5.0%	3 112	3 106	3 099	3 122	+0.7%
CY	57	60	59			21	22	21			9	10	9			27	28	29		
LV	406	422	419	412	-1.6%	109	118	114	113	-0.5%	75	75	76	73	-4.8%	222	229	229	227	-1.1%
LT	714	737	723	695	-3.9%	187	192	185	179	-3.2%	144	149	152	142	-6.3%	383	395	385	373	-3.2%
LU	198	201	201	202	+0.9%	55	54	54	54	+1.2%	45	47	45	44	-0.5%	98	100	102	104	+1.3%
HU	782	802	821	838	+2.1%	212	219	220	232	+5.5%	179	176	180	173	-3.9%	393	407	421	434	+3.1%
MT	15	15	15	14	-4.4%	4	4	4	4	-6.9%	4	3	4	3	-12.6%	7	7	7	7	+1.2%
NL	4 090	4 169	4 315	4 294	-0.5%	1 653	1 676	1 707	1 666	-2.4%	627	657	660	644	-2.4%	1 810	1 836	1 948	1 985	+1.9%
AT	1 958	1 961	1 958	1 954	-0.2%	627	629	624	632	+1.2%	435	432	439	432	-1.6%	897	899	894	890	-0.4%
PL	5 590	5 660	5 763	5 985	+3.9%	1 409	1 450	1 617	1 718	+6.2%	1 372	1 445	1 532	1 637	+6.9%	2 809	2 765	2 614	2 630	+0.6%
PT	1 471	1 549	1 606	1 635	+1.8%	425	487	510	499	-2.1%	211	214	240	267	+11.0%	834	848	856	869	+1.6%
RO	2 022	2 069	2 092	2 058	-1.7%	454	463	475	466	-1.9%	238	254	261	257	-1.8%	1 331	1 352	1 357	1 335	-1.6%
SI	461	468	484	489	+1.0%	144	148	153	155	+1.7%	123	122	129	131	+1.1%	194	198	202	203	+0.3%
SK	468	466	457	449	-1.7%	133	130	130	131	+1.0%	98	93	91	85	-6.4%	238	243	236	233	-1.3%
FI	903	907	903	887	-1.8%	302	307	308	302	-1.9%	224	223	221	218	-1.3%	378	378	374	367	-2.0%
SE	1 444	1 436	1 428	1 436	+0.5%	469	473	467	468	+0.2%	342	334	342	344	+0.6%	632	629	619	624	+0.8%
UK	9 682	9 693	9 816	9 942	+1.3%	2 803	2 842	2 967	3 046	+2.7%	2 411	2 332	2 372	2 468	+4.0%	4 468	4 520	4 477	4 429	-1.1%
EU	87 734	88 406	89 152	89 199	+0.1%	26 148	26 705	27 209	26 958	-0.8%	18 342	18 189	18 445	18 786	+1.9%	43 246	43 514	43 498	43 458	-0.0%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2015 AND 2016

16 November 2017

Agriculture  
and Rural  
Development

# LIVESTOCK

DECEMBER SURVEY



European  
Commission

# EU EVOLUTION COWS

Dec 1000 Hd	TOTAL COWS					%Var 2016 2015	DAIRY COWS					%Var 2016 2015	OTHER COWS					%Var 2016 2015
	2013	2014	2015	2016		2013	2014	2015	2016		2013	2014	2015	2016				
BE	945	956	974	987	+1.3%	516	519	529	530	+0.2%	429	436	445	457	+2.6%			
BG	353	351	359	365	+1.7%	313	302	283	280	-1.2%	40	49	76	86	+12.4%			
CZ	553	566	566	561	-1.0%	375	372	369	367	-0.5%	178	194	197	193	-1.9%			
DK	664	643	664	657	-1.1%	567	547	570	565	-0.9%	97	96	94	92	-2.1%			
DE	4 941	4 969	4 966	4 887	-1.6%	4 268	4 296	4 285	4 218	-1.6%	673	674	681	670	-1.7%			
EE	118	118	116	114	-1.4%	98	96	91	86	-4.7%	20	23	25	28	+10.8%			
IE	2 168	2 169	2 293	2 337	+1.9%	1 082	1 128	1 240	1 295	+4.5%	1 085	1 041	1 053	1 042	-1.1%			
EL	289	305	274	269	-1.8%	130	135	111	113	+1.8%	159	169	163	156	-4.3%			
ES	2 633	2 669	2 763	2 780	+0.6%	844	845	844	820	-2.9%	1 789	1 824	1 919	1 960	+2.2%			
FR	7 804	7 841	7 872	7 856	-0.2%	3 697	3 699	3 661	3 630	-0.8%	4 106	4 142	4 211	4 225	+0.3%			
HR	181	180	171	167	-2.3%	168	159	152	147	-3.3%	13	21	19	20	+5.3%			
IT	2 410	2 398	2 386	2 365	-0.9%	2 075	2 069	2 057	2 060	+0.2%	335	329	329	305	-7.5%			
CY	25	25	26			25	25	26			0	0	0					
LV	194	200	201	199	-1.3%	165	166	162	154	-5.2%	29	34	39	45	+15.0%			
LT	345	351	343	333	-2.9%	316	314	301	286	-4.9%	29	37	43	47	+11.0%			
LU	78	75	77	80	+3.2%	48	47	49	52	+5.8%	30	29	28	28	-1.3%			
HU	345	359	368	379	+3.0%	250	255	251	242	-3.6%	96	104	117	137	+17.1%			
MT	6	7	7	7	+1.7%	6	7	6	6	+2.0%	1	0	0	0	-11.5%			
NL	1 683	1 694	1 802	1 864	+3.4%	1 597	1 610	1 717	1 794	+4.5%	86	84	85	70	-17.6%			
AT	766	768	758	757	-0.3%	530	538	534	540	+1.1%	237	230	224	217	-3.4%			
PL	2 442	2 403	2 303	2 334	+1.4%	2 299	2 248	2 134	2 161	+1.2%	143	155	169	174	+2.9%			
PT	677	697	719	724	+0.7%	231	234	243	239	-1.8%	446	463	476	485	+1.9%			
RO	1 187	1 207	1 207	1 189	-1.6%	1 169	1 188	1 191	1 173	-1.5%	18	18	17	16	-4.2%			
SI	166	168	170	171	+0.9%	110	108	113	108	-4.4%	56	60	57	64	+11.4%			
SK	199	202	200	195	-2.1%	145	143	139	133	-4.6%	54	59	60	62	+3.6%			
FI	338	340	339	333	-1.9%	282	283	282	275	-2.4%	56	57	57	57	+0.5%			
SE	522	517	513	514	+0.2%	346	344	337	326	-3.2%	175	173	176	188	+6.7%			
UK	3 371	3 419	3 469	3 490	+0.6%	1 817	1 883	1 918	1 920	+0.1%	1 554	1 536	1 551	1 570	+1.2%			
EU	35 401	35 596	35 907	35 913	+0.1%	23 468	23 559	23 595	23 519	-0.2%	11 934	12 037	12 312	12 393	+0.7%			

16 November 2017

Source : EStat Newcronos

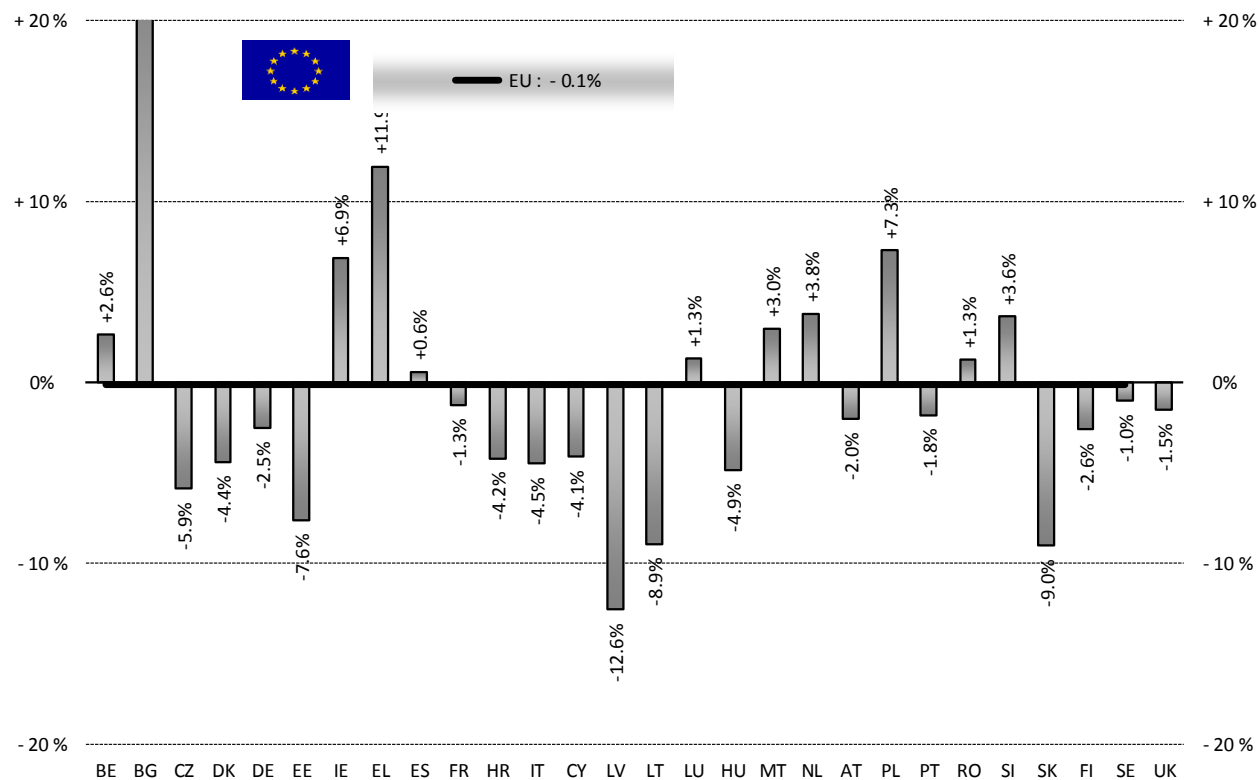
Agriculture  
and Rural  
Development

EU %Var is calculated considering only countries available in 2015 AND 2016



HEADS	Jan-Aug 16/17	
	EU15	EU28
Bull	-1.4%	+0.0%
Bullock	+2.9%	+2.9%
Cow	-3.4%	-3.1%
Heifer	+6.4%	+6.5%
Calve	-0.7%	-0.9%
Young cattle	-3.8%	-3.6%
Meat of bovine animals	-0.5%	-0.1%

Estimates for last month of period :



Source : EStat - Newcronos

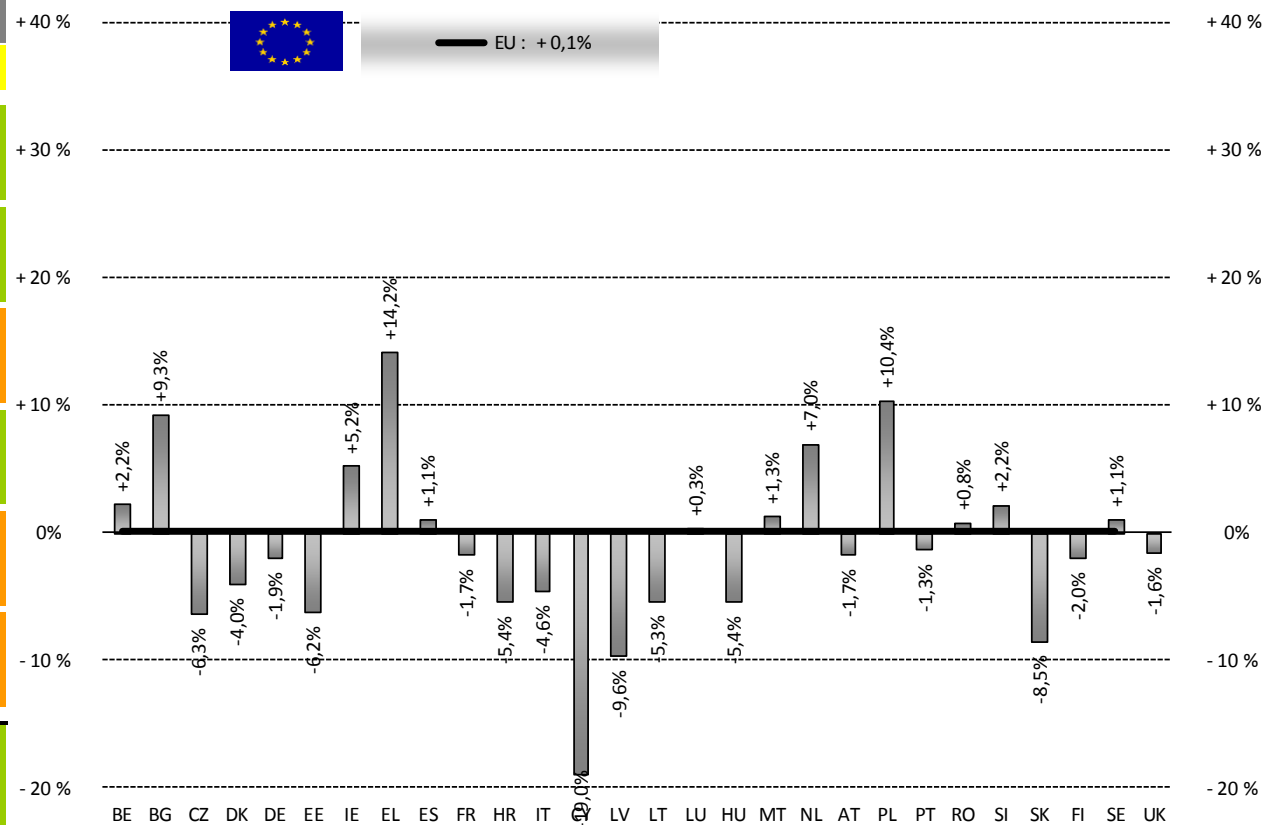
# PRODUCTION

# % EVOLUTION TONNES



TONNES	Jan-Aug 16/17	
	EU15	EU28
Bull	-1,2%	+0,3%
Bullock	+1,5%	+1,4%
Cow	-3,8%	-3,5%
Heifer	+7,8%	+8,1%
Calve	-0,5%	-0,6%
Young cattle	-4,2%	-4,0%
Meat of bovine animals	-0,4%	+0,1%

Estimates for last month of period

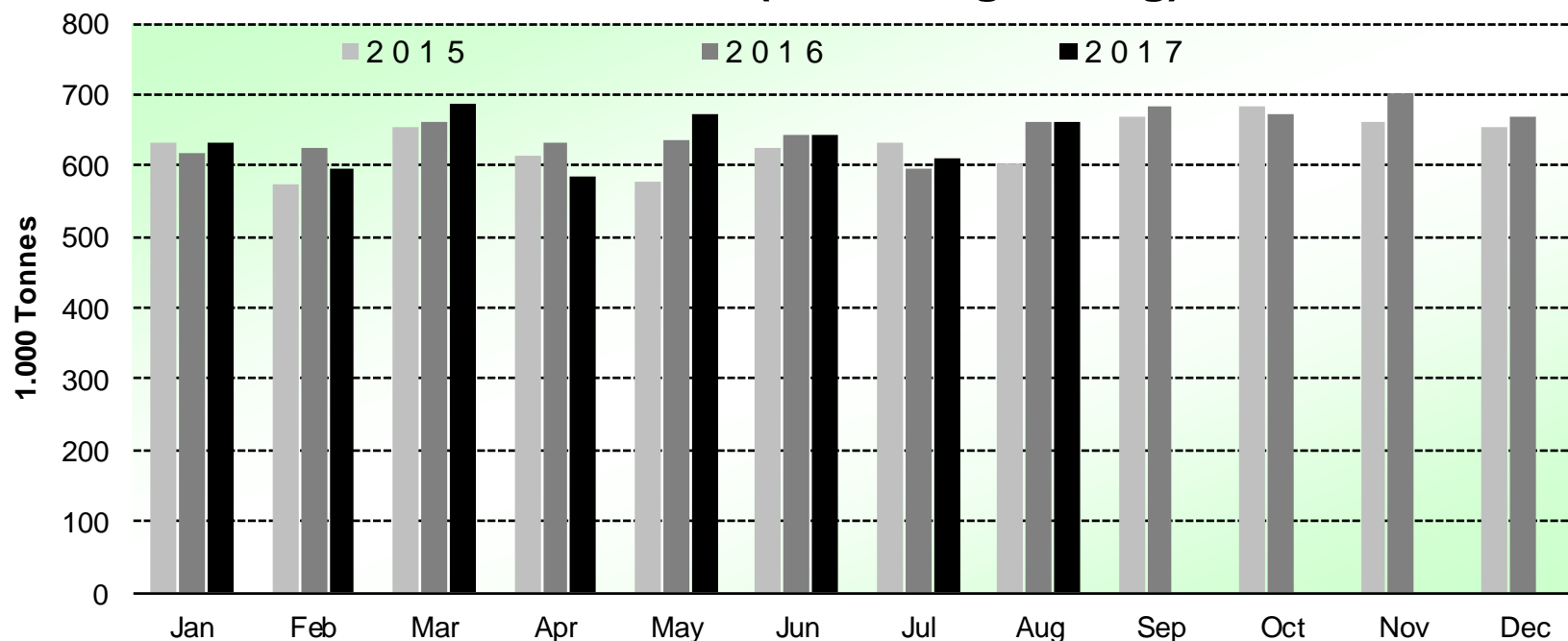


Source : EStat - Newcronos

16 November 2017



## Beef & Veal Production (E28 Slaughtering) - Tonnes



Source : EStat-Newcronos

16 November 2017



European  
Commission

# PRICES

16 November 2017

Agriculture  
and Rural  
Development

# PRICES CARCASSES

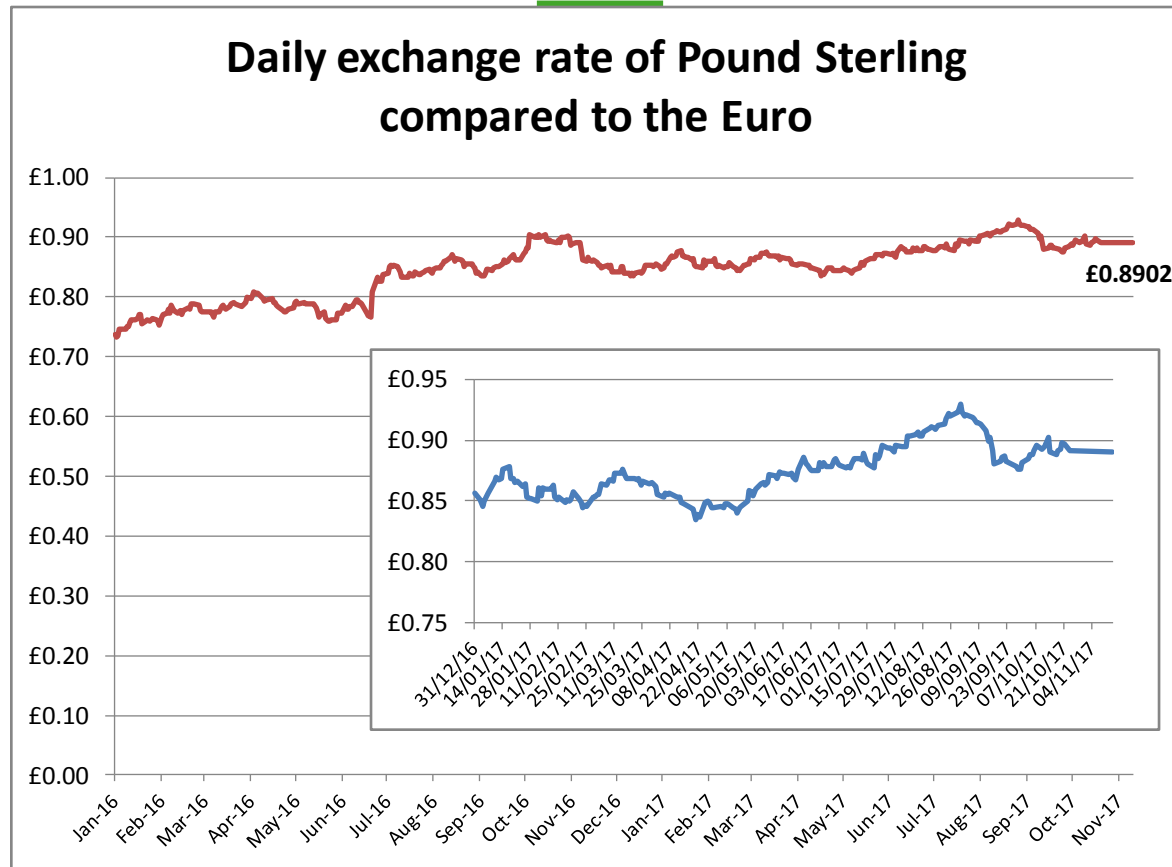
Dashboard

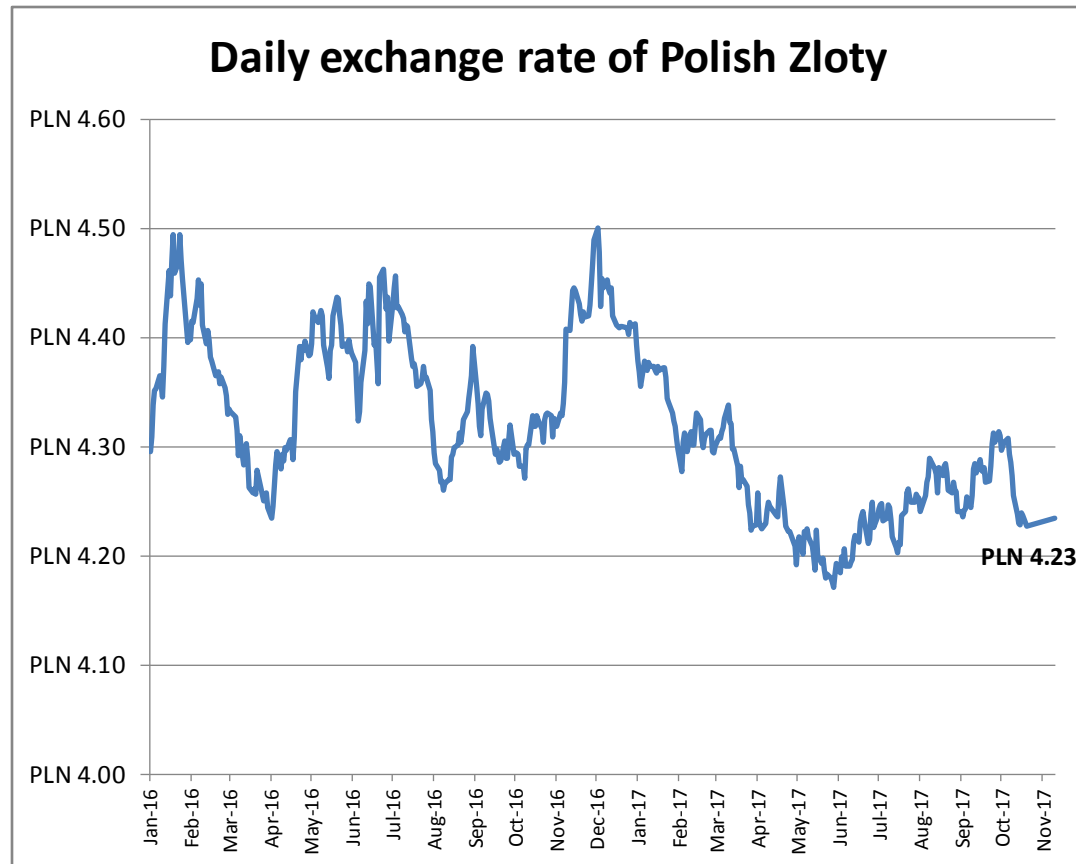


EU Prices week		44	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	385,6	€/100 kg	+ 0,4%	+ 0,4%	+ 6,2%
	Young Bovines (Z)	399,2		+ 2,2%	- 0,1%	+ 2,2%
	Young Bulls (A)	388,4		+ 0,4%	+ 1,1%	+ 6,9%
	Steers (C)	395,3		+ 0,4%	- 1,2%	+ 3,6%
	Cows (D)	296,2		+ 0,1%	- 1,0%	+ 12,8%
	Heifers (E)	387,8		+ 0,0%	+ 0,3%	+ 4,0%
Live Animals	Male Calves Dairy Type	93,09	€/head	+ 2,0%	+ 2,0%	+ 19,0%
	Male Calves Beef Type	215,9		+ 1,9%	+ 0,3%	+ 1,9%
	Young Store Cattle	2,39	€/kg	- 0,7%	+ 1,4%	+ 5,0%
	Yearling Male Store Cattle	2,27		+ 0,3%	- 0,1%	+ 7,6%
	Yearling Female Store Cattle	2,24		- 3,5%	- 4,5%	+ 4,2%
	Calves slaughtered <8M	528,4	€/100	+ 0,4%	+ 2,2%	+ 4,2%

Sources : MSs notifications (Regulation (EC) 1249/2008 and 807/2013)

16 November 2017





16 November 2017

# PRICES CARCASSES

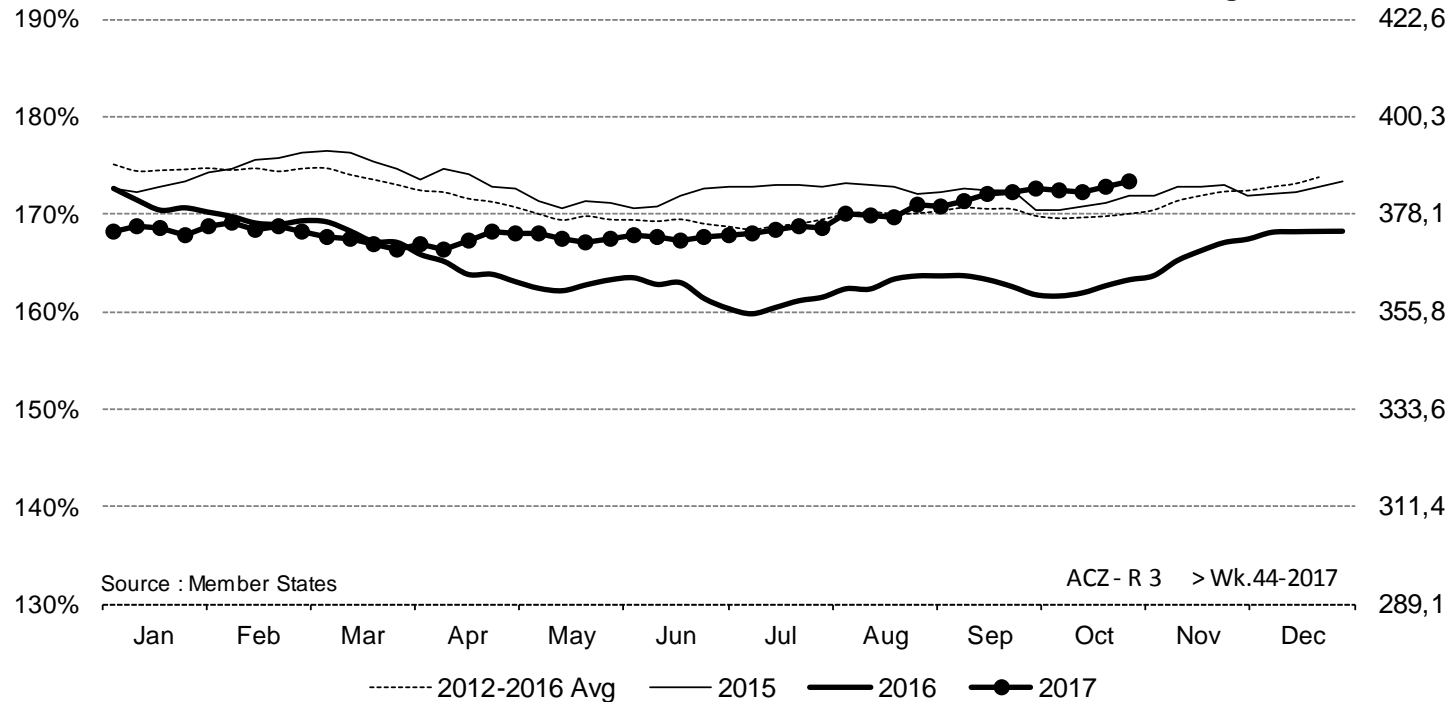


# EU EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.44-2017

% of Reference Price

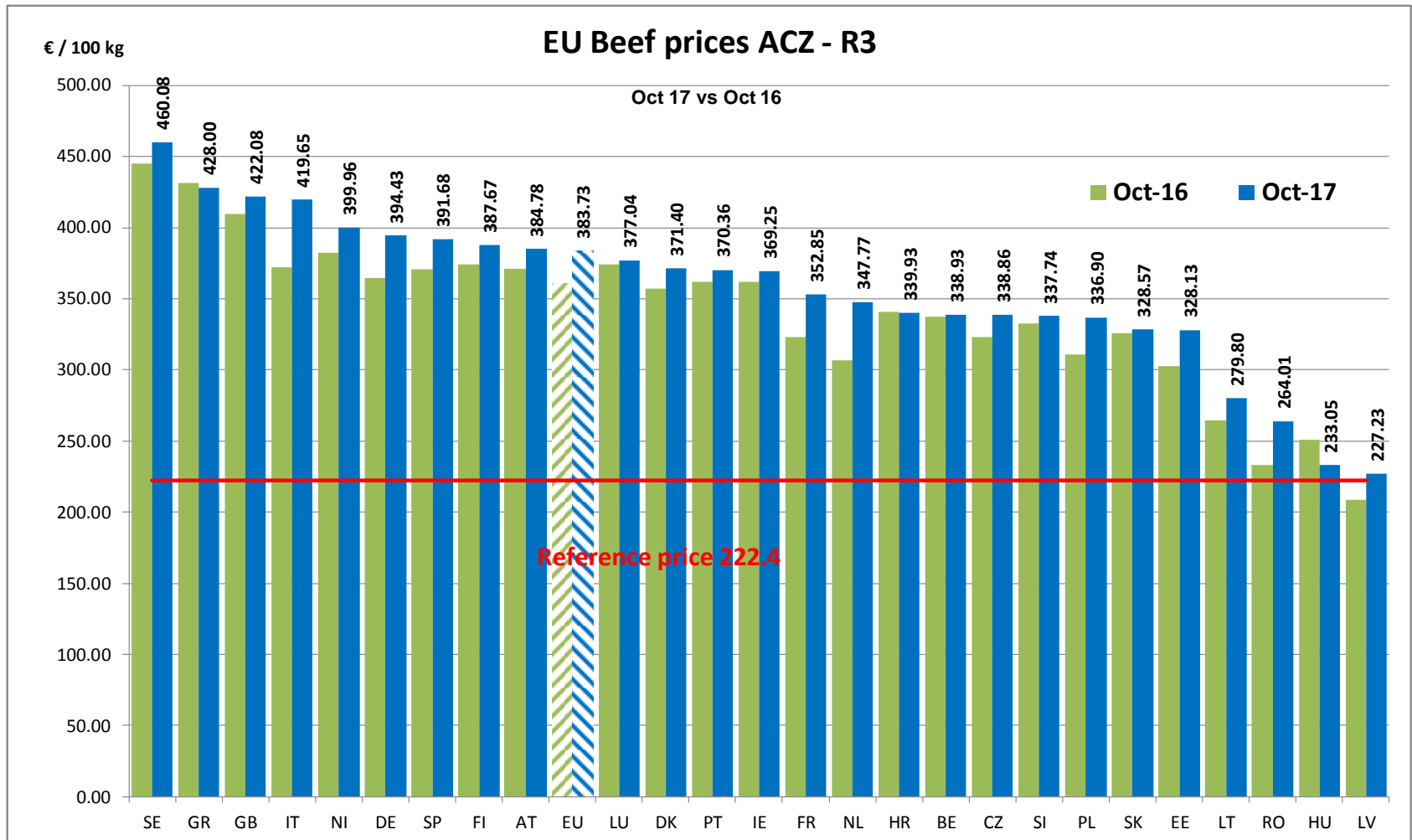
€/100 kg cwe



Price in week 44 : **385,63**  
 % change y/y : **+ 6,2%**  
 % Ref. Price in wk 44 : **173,4%**

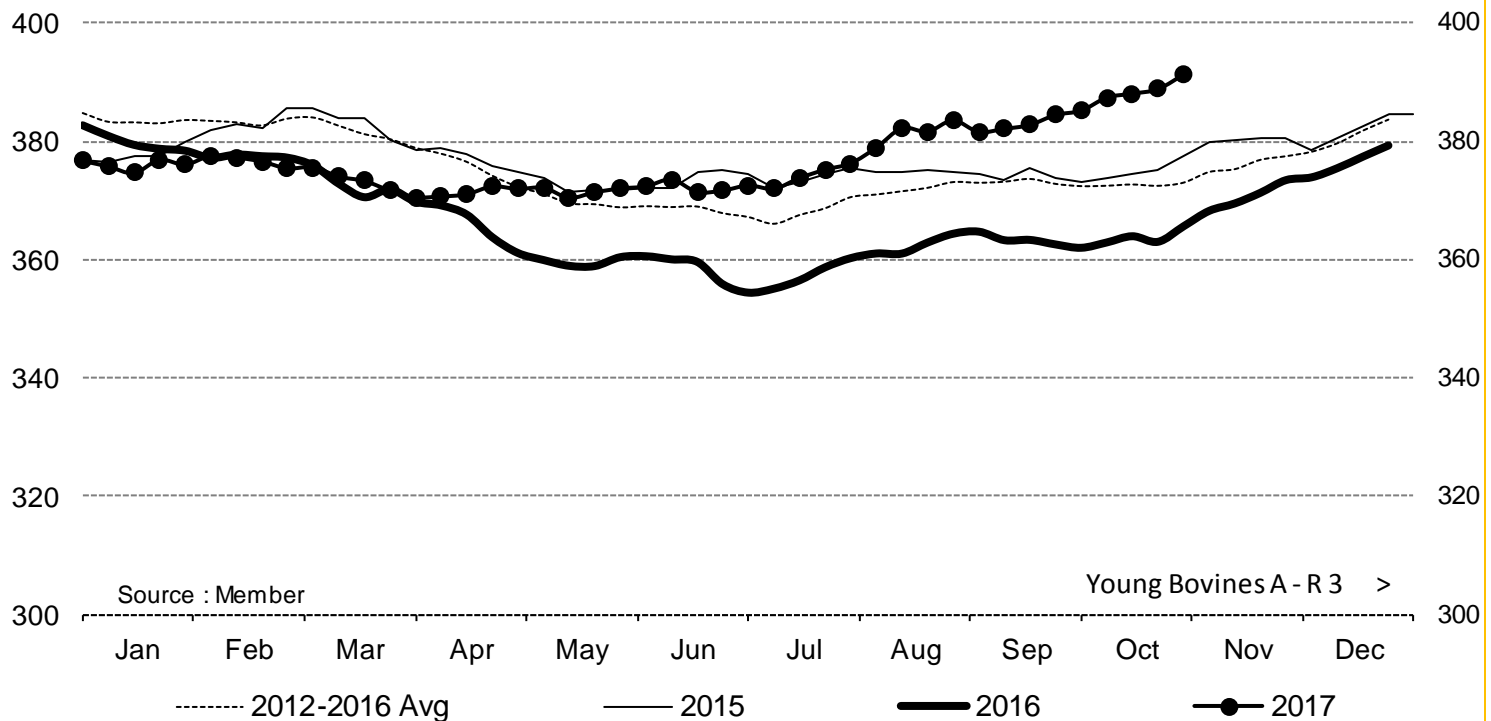
Average price in October 2017 : **383,73**  
 % change y/y : **+ 6,5%**

16 November 2017



16 November 2017

## Young Bovines A - R 3 > Wk.44-2017



Price in week 44 : **391,29**  
% change y/y : **+ 7,0%**

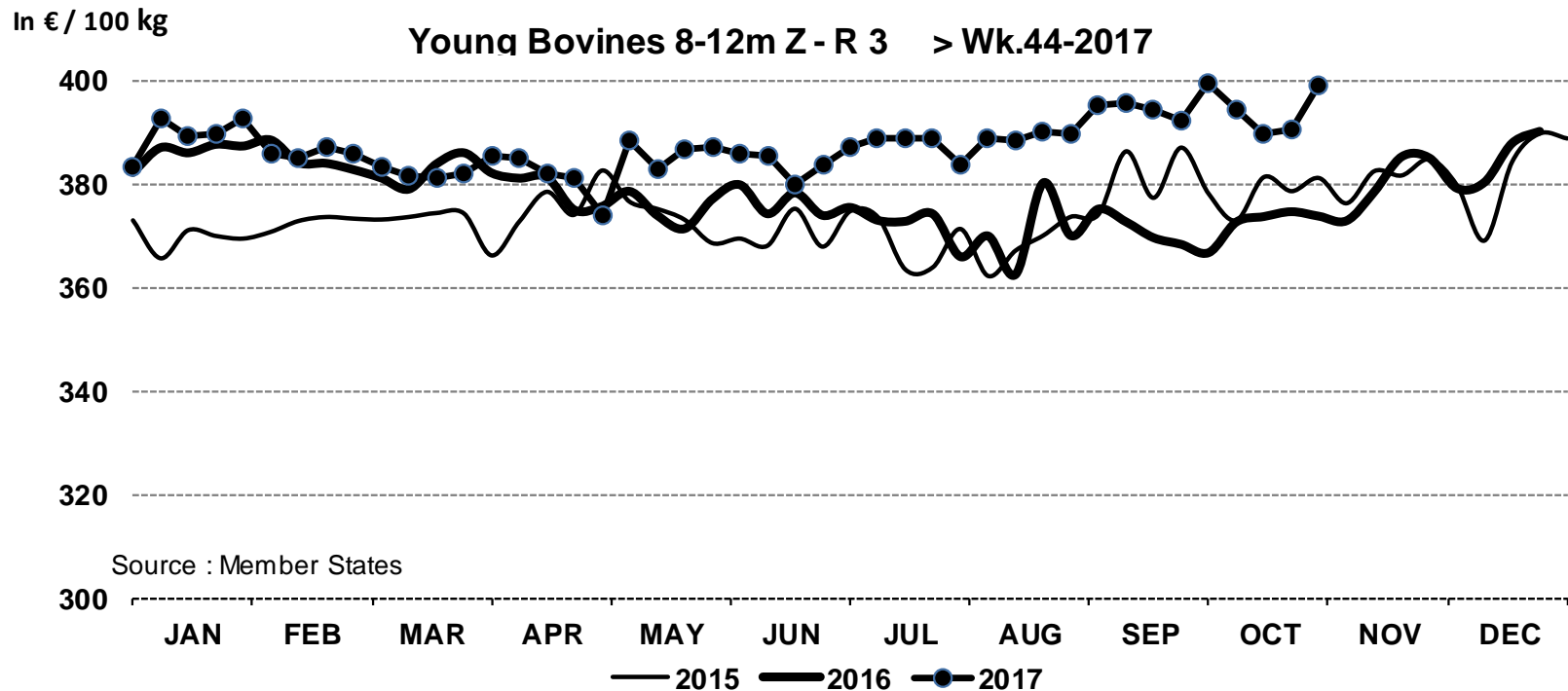
Average price in October 2017 : **387,51**  
% change y/y : **+ 6,8%**

16 November 2017

# PRICES CARCASSES



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



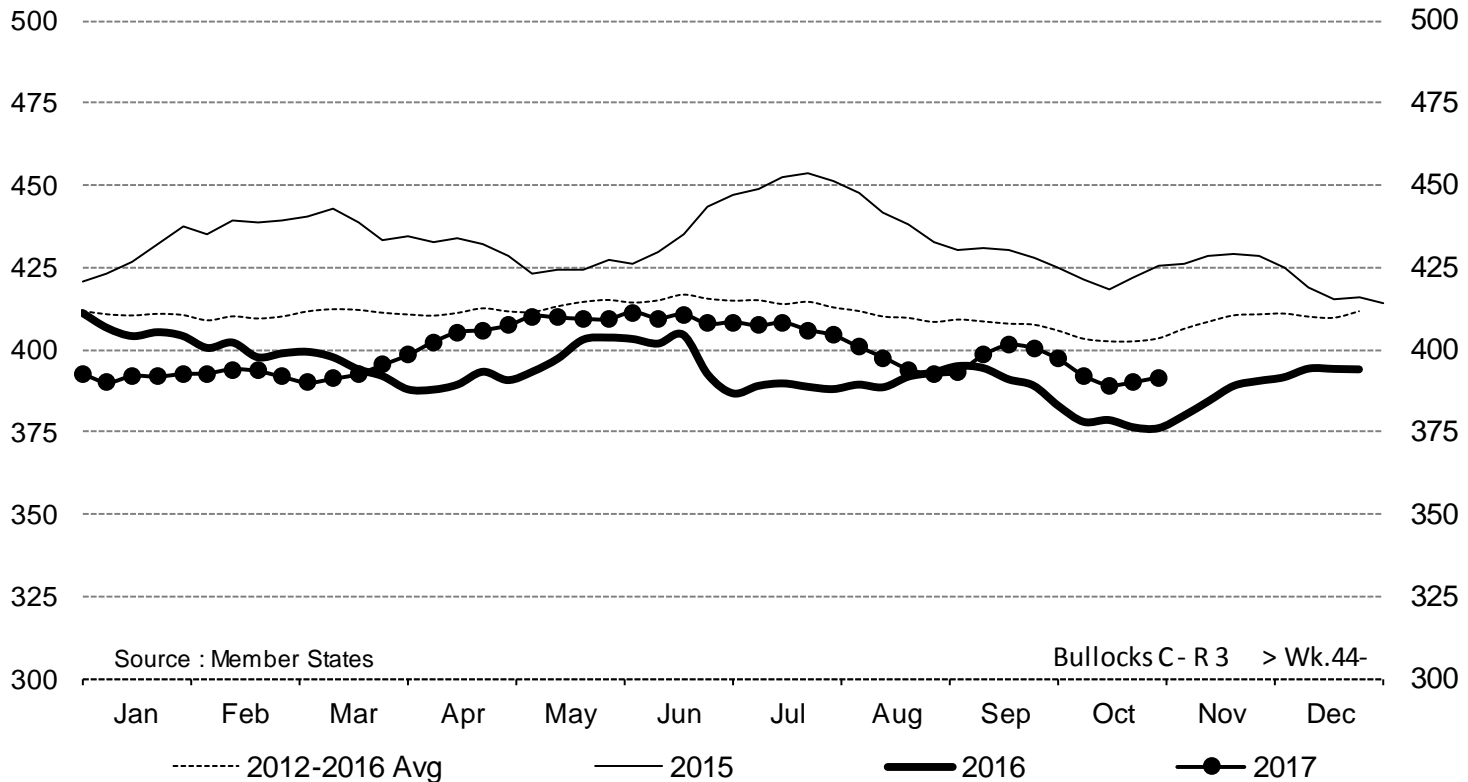
Price in week 44 : **399,26**  
% change y/y : **+ 6,8%**

09/10/2017

Average price in October 2017 : **393,95**  
% change y/y : **+ 6,0%**

16 November 2017

## Bullocks C - R 3 > Wk.44-2017

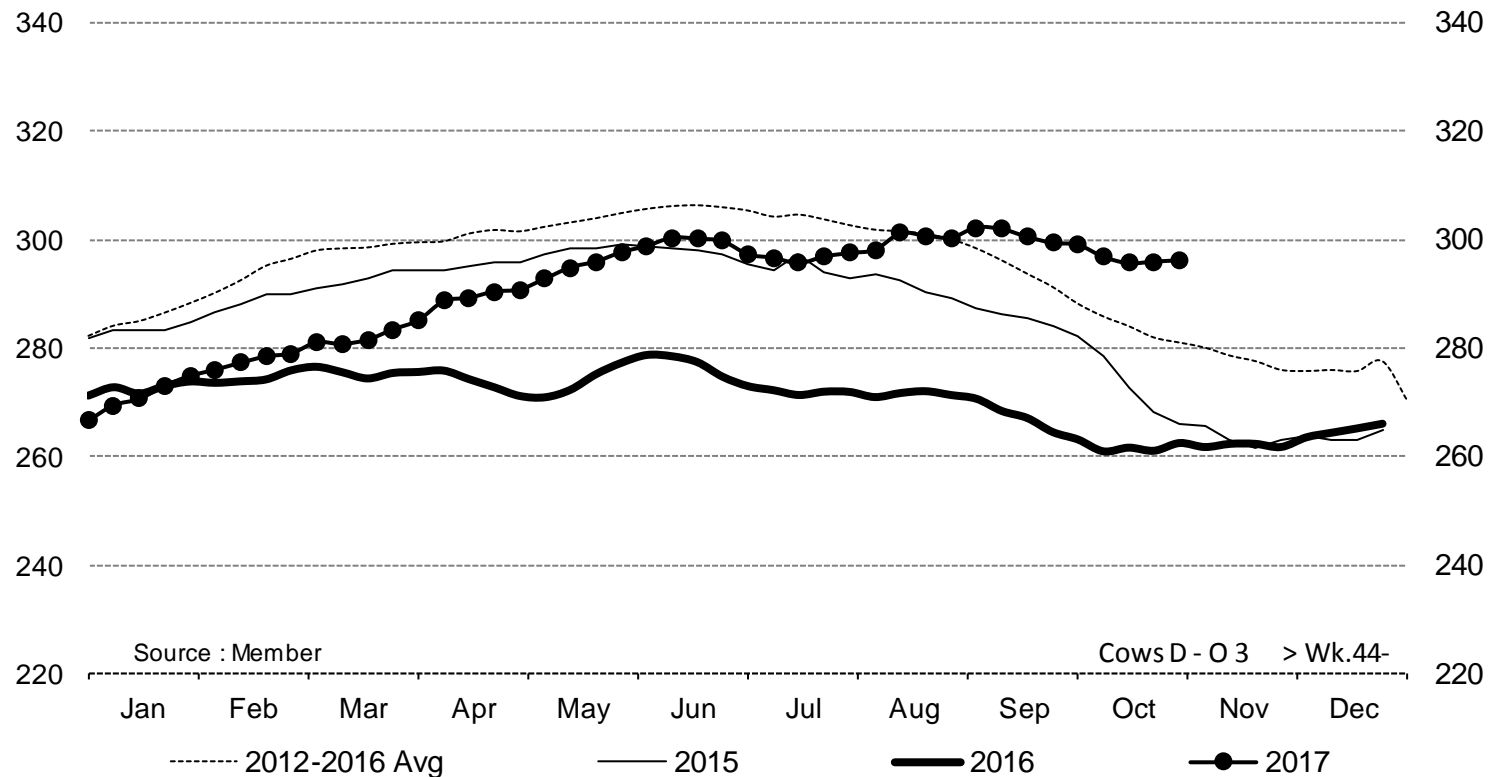


Price in week 44 : **391,61**  
% change y/y : **+ 4,1%**

Average price in October 2017 : **392,31**  
% change y/y : **+ 3,4%**

16 November 2017

## Cows D - O 3 > Wk.44-2017

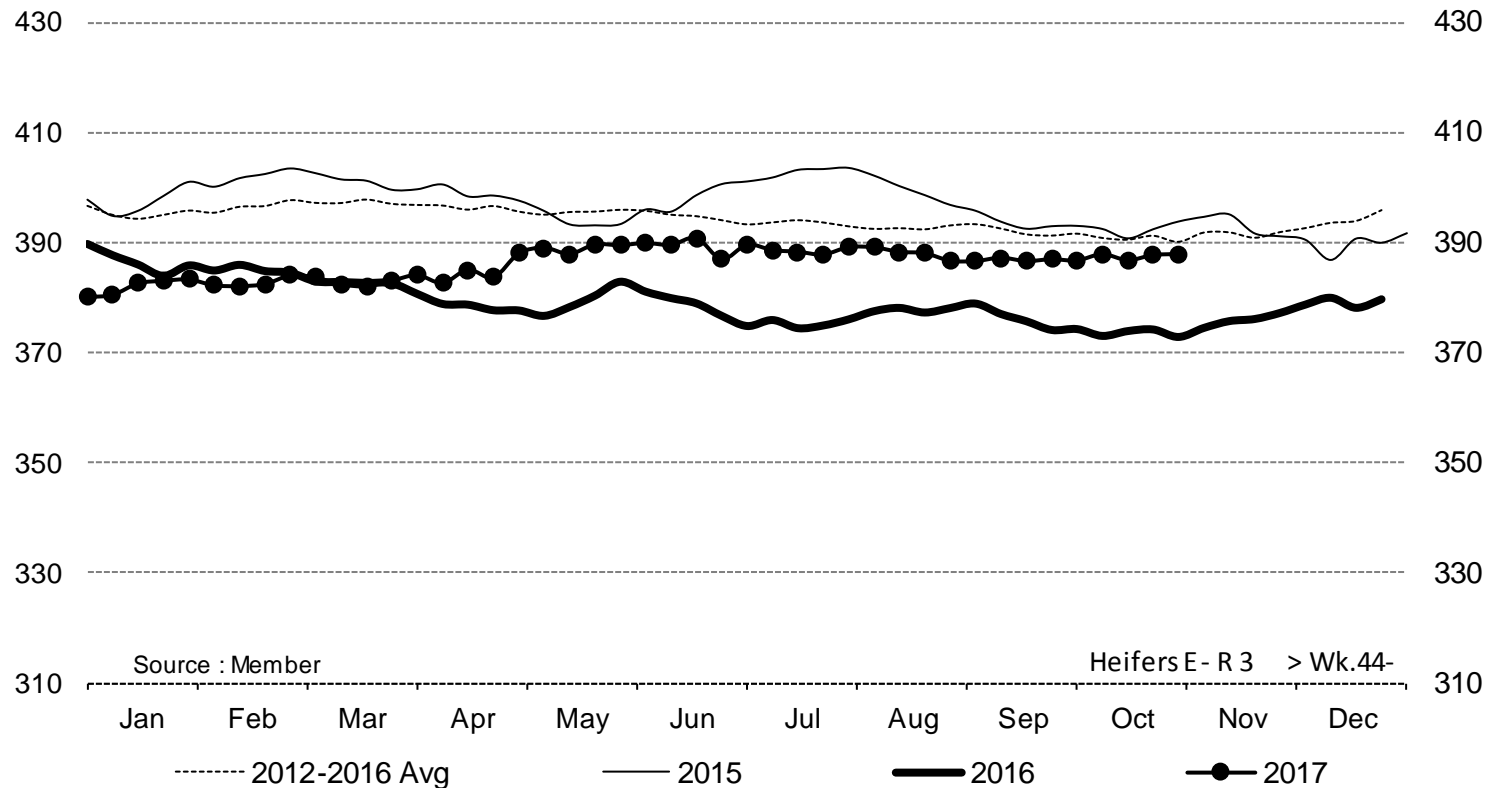


Price in week 44 : **296,23**  
% change y/y : **+ 12,8%**

Average price in October 2017 : **296,95**  
% change y/y : **+ 13,4%**

16 November 2017

## Heifers E - R 3 > Wk.44-2017



Price in week 44 : **387,88**  
% change y/y : **+ 4,0%**

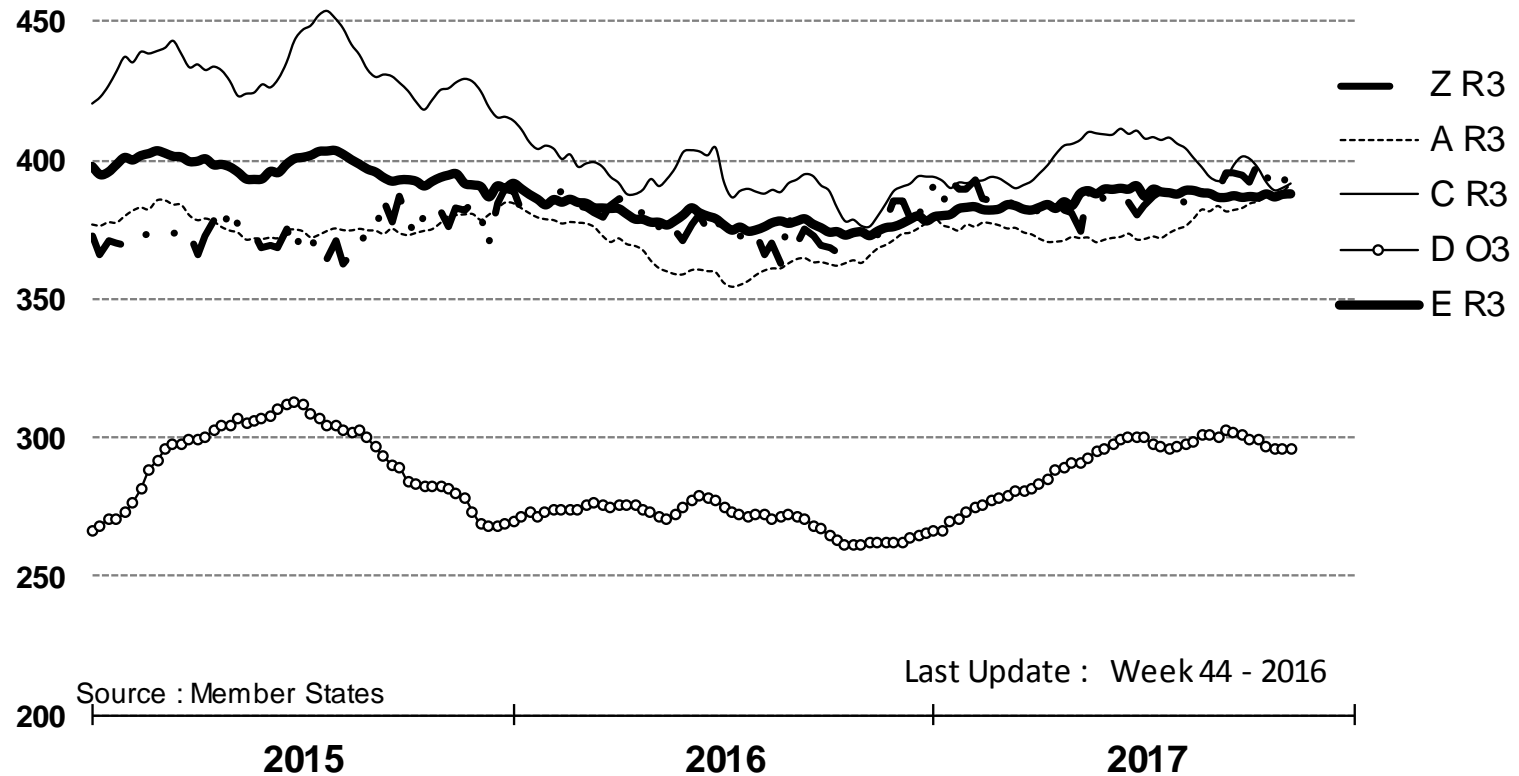
Average price in October 2017 : **387,29**  
% change y/y : **+ 3,6%**

16 November 2017

# PRICES CARCASSES

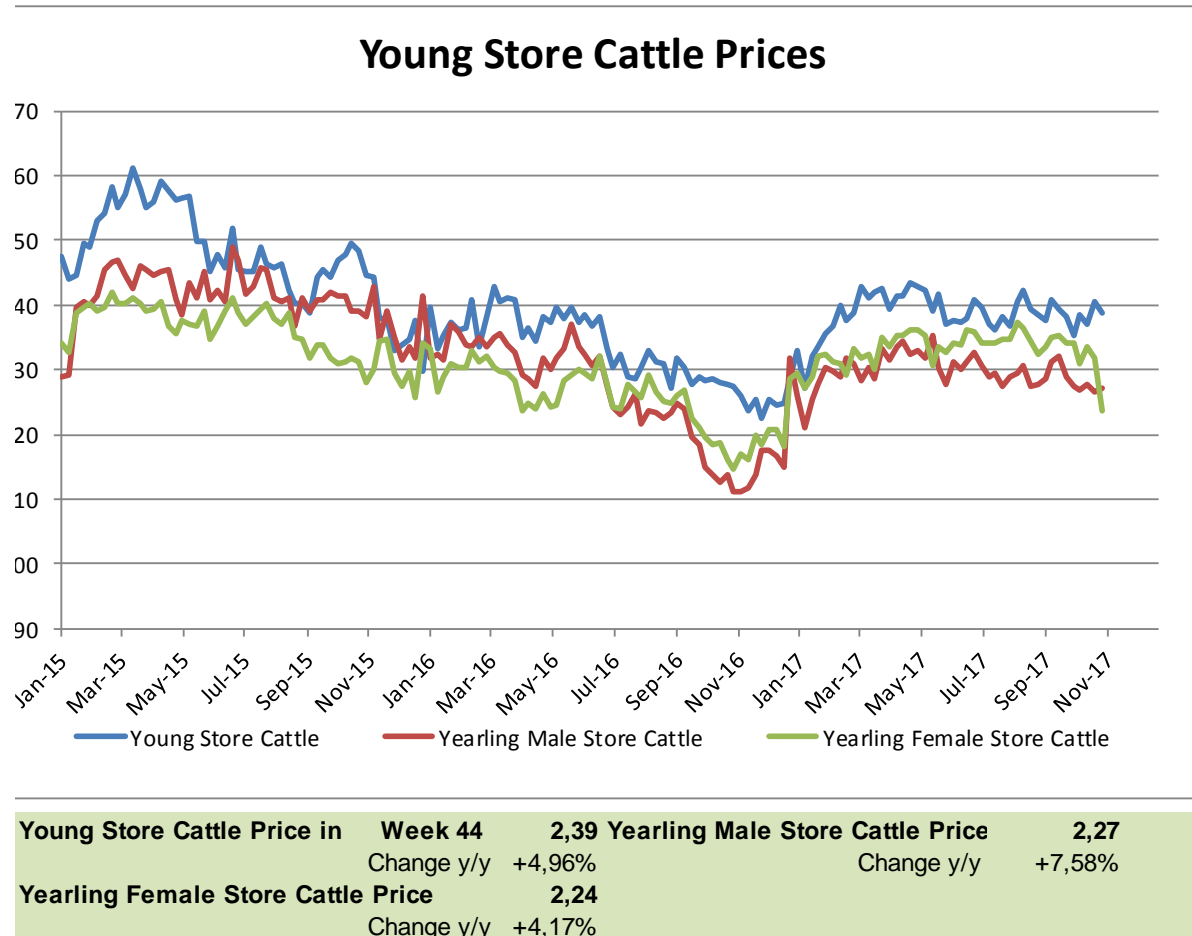


# EU EVOLUTION All CAT GLOBAL VIEW



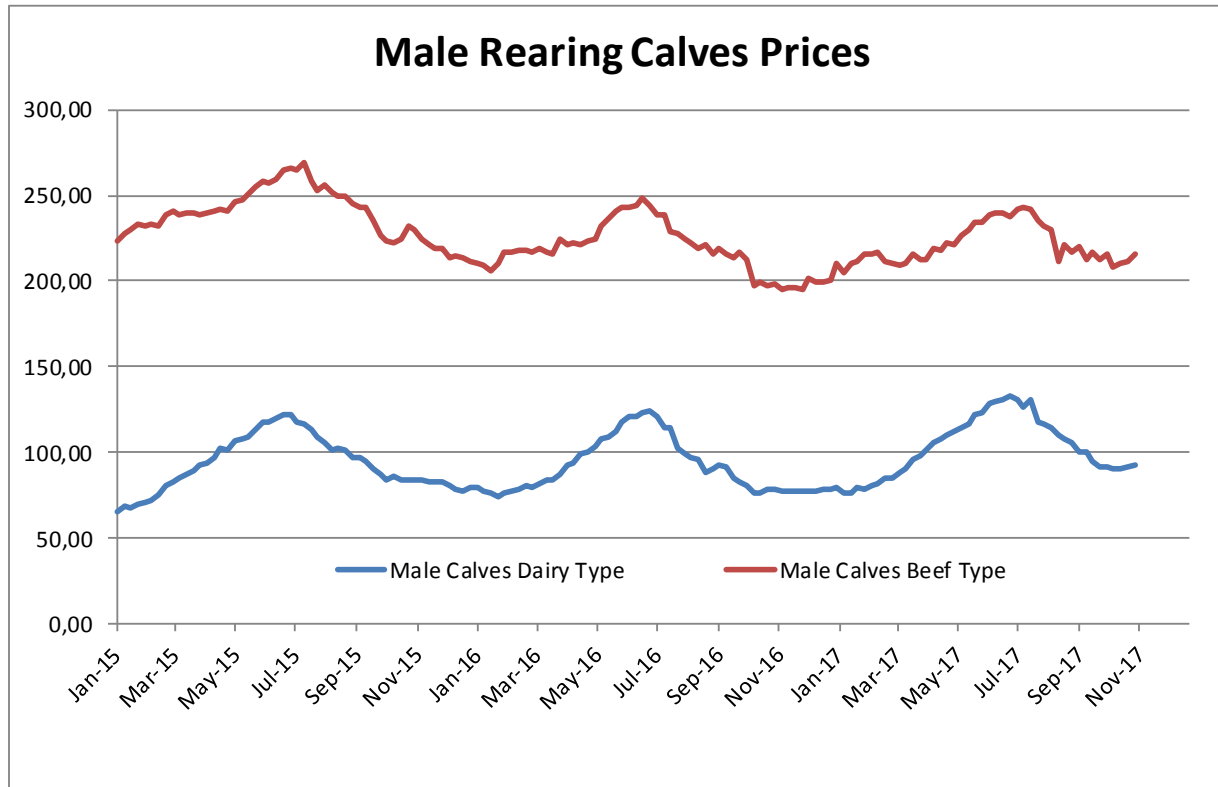
16 November 2017

## Store cattle (€/100 kg live weight)



16 November 2017

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



**Male Rearing Calves Beef type**

Price in Week 44

215,93

Change y/y

+8,80%

**Male Rearing Calves Dairy type**

Price in Week 44

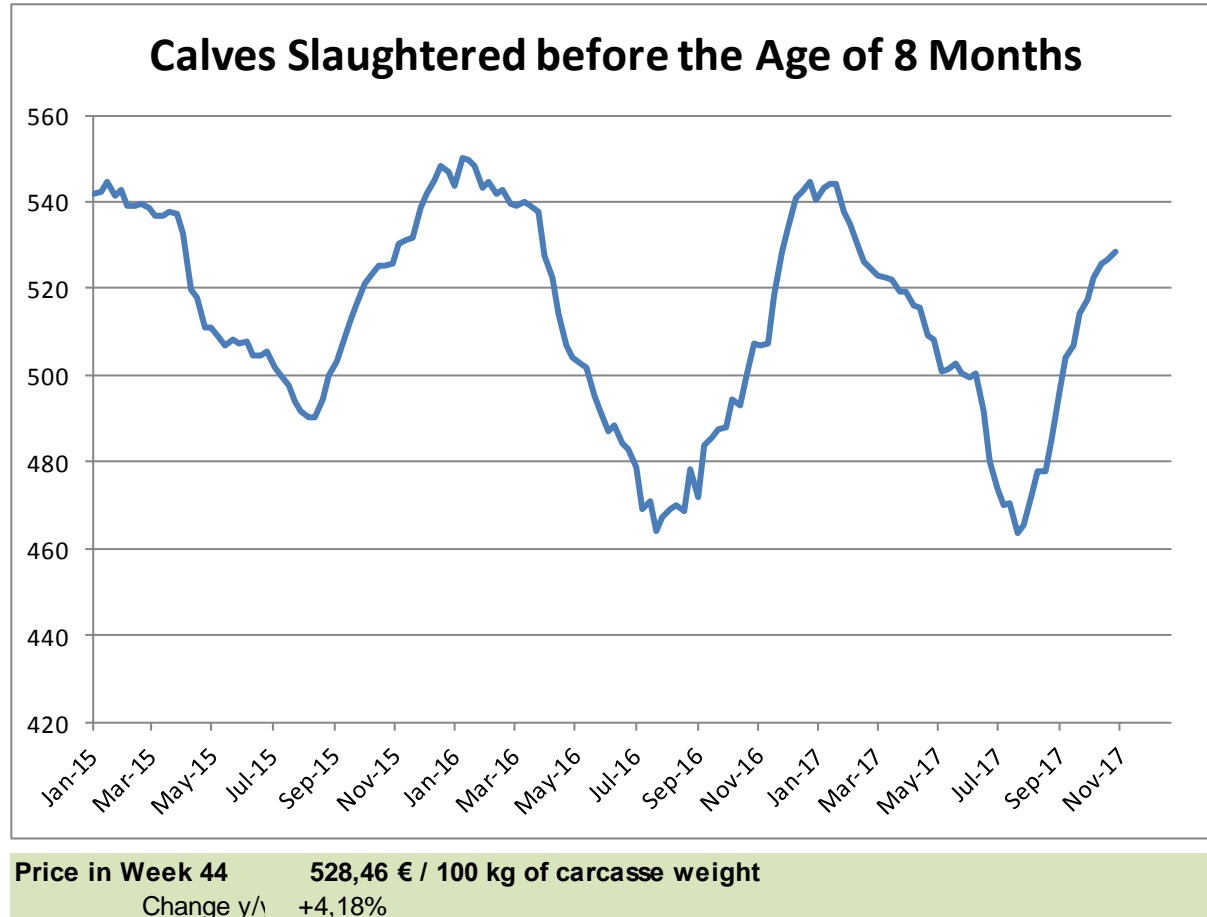
93,09

Change y/y

+19,01%

16 November 2017

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

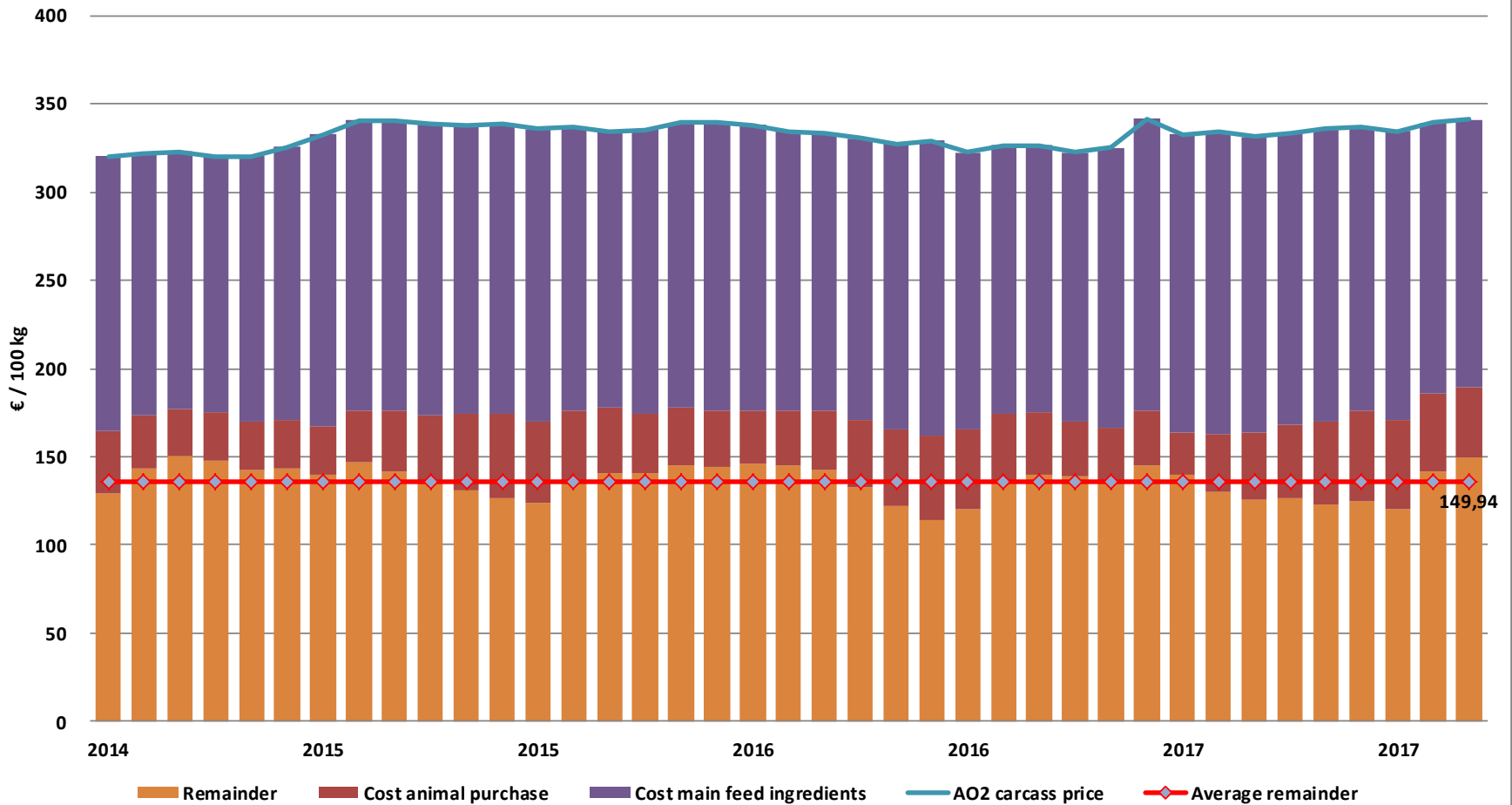


16 November 2017

# REMAINDERS



## Remainder for dairy calves fattening

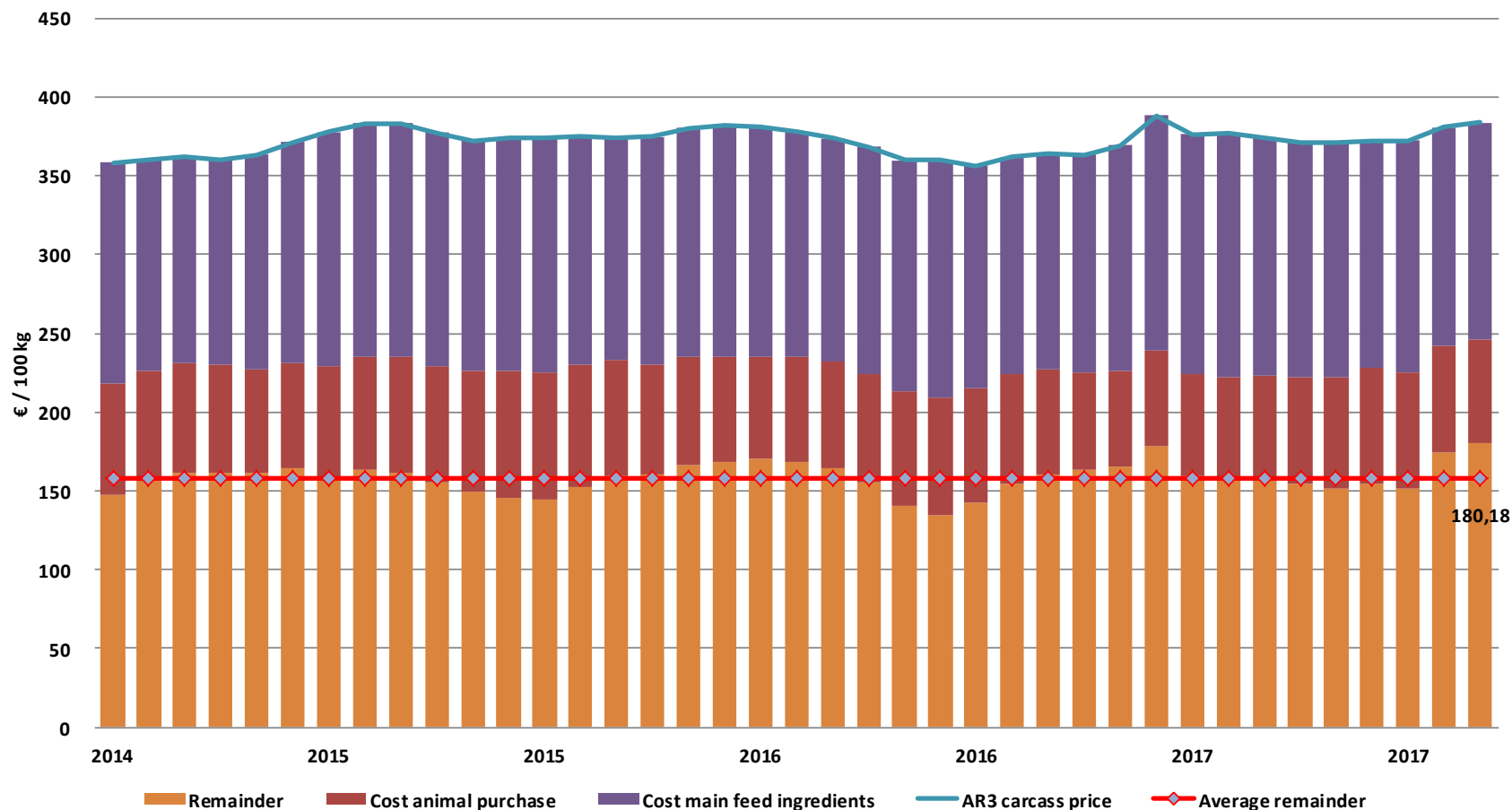


16 November 2017

# REMAINDERS



## Remainder for beef type calves fattening

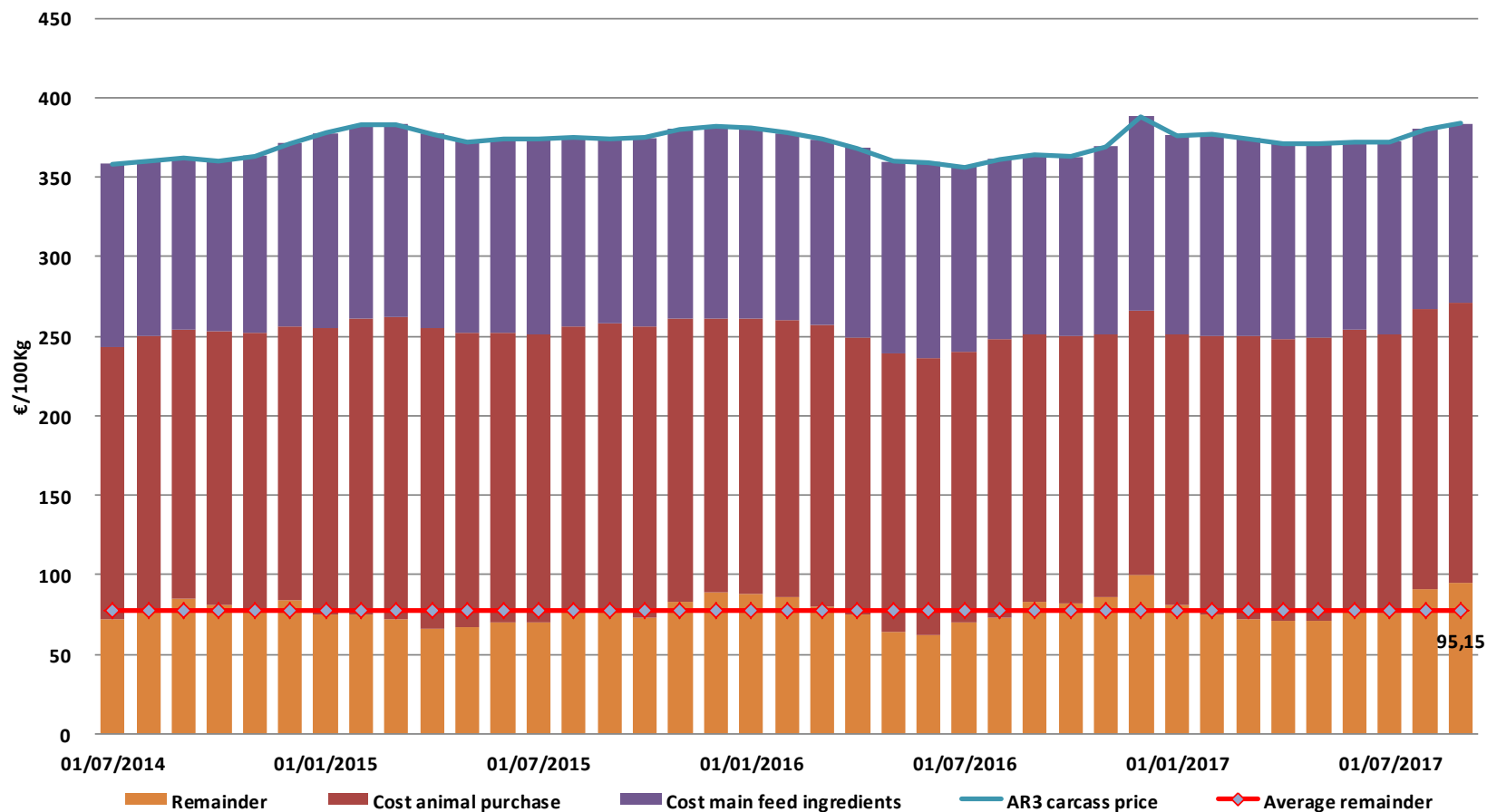


16 November 2017

# REMAINDERS



## Remainder for young store cattle fattening



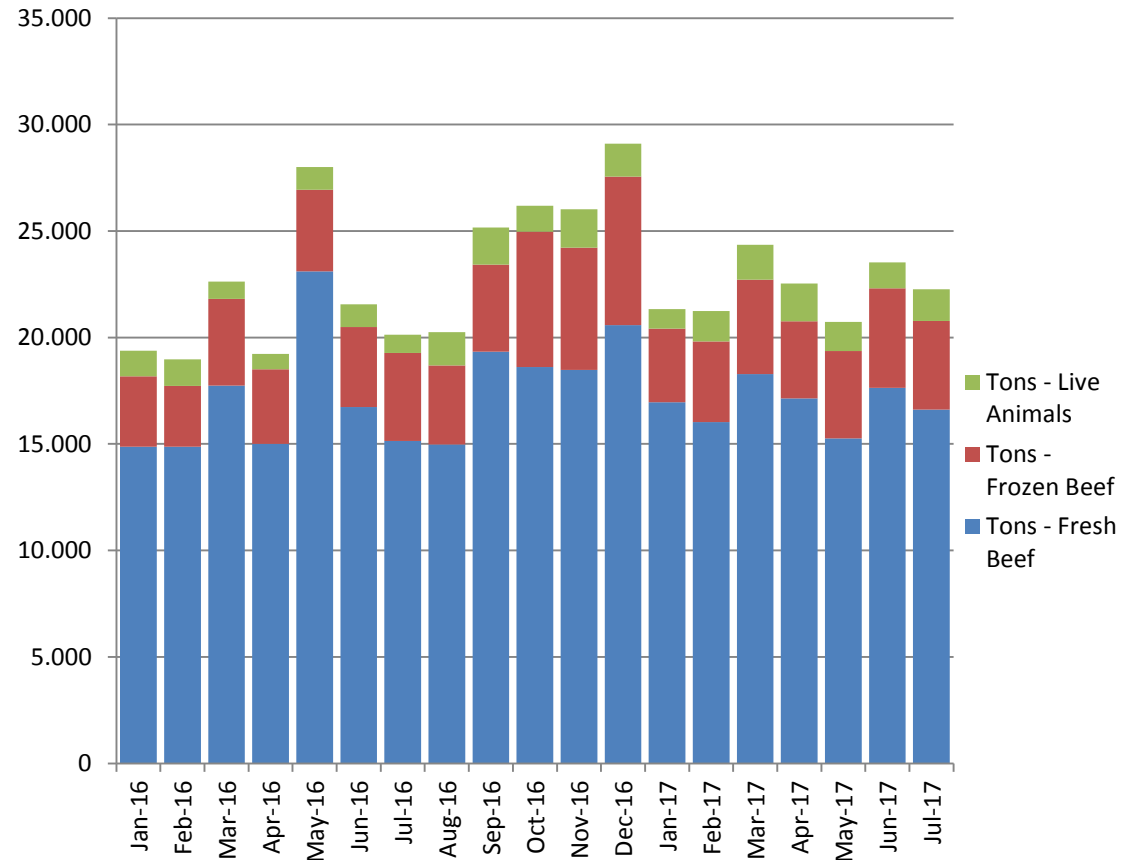
16 November 2017

# TRADE EU27-UK

16 November 2017

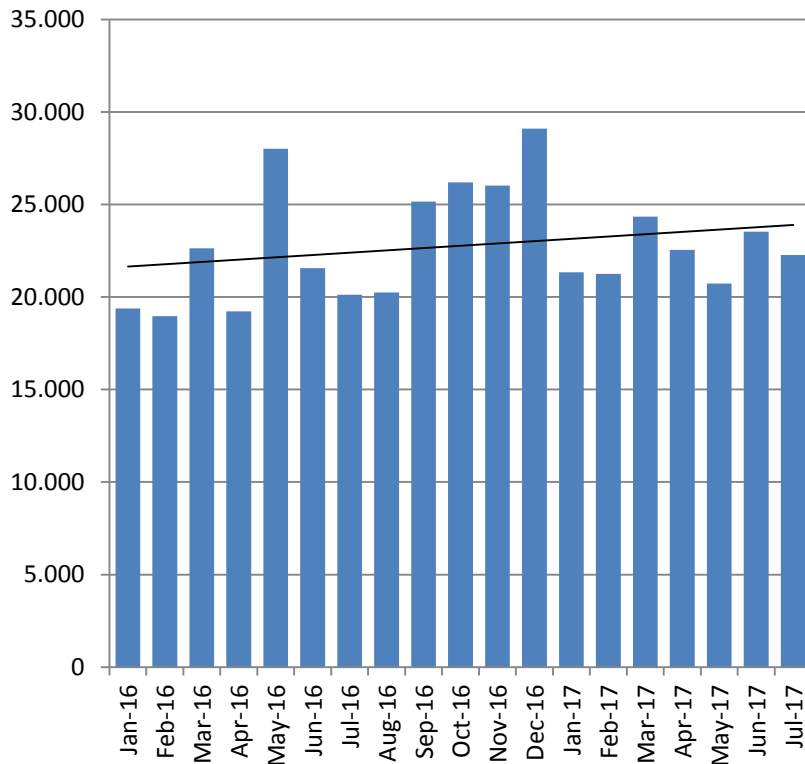
## Exports from EU27 to UK (from Jan 2016 to July 2017)

Main EU27 exporters to UK		
IE		76,51%
NL		8,98%
PL		6,16%
DE		2,60%
ES		1,44%
FR		1,01%
Others		3,30%

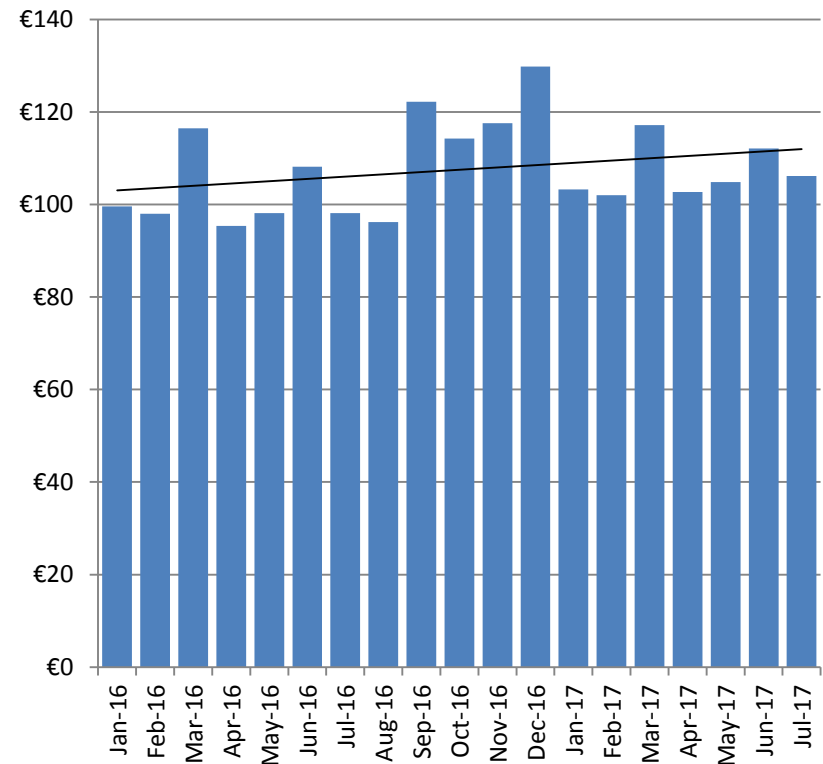


## Exports from EU27 to UK (from Jan 2016 to July 2017)

**Quantity: Tons**



**Value: Mio Euros**

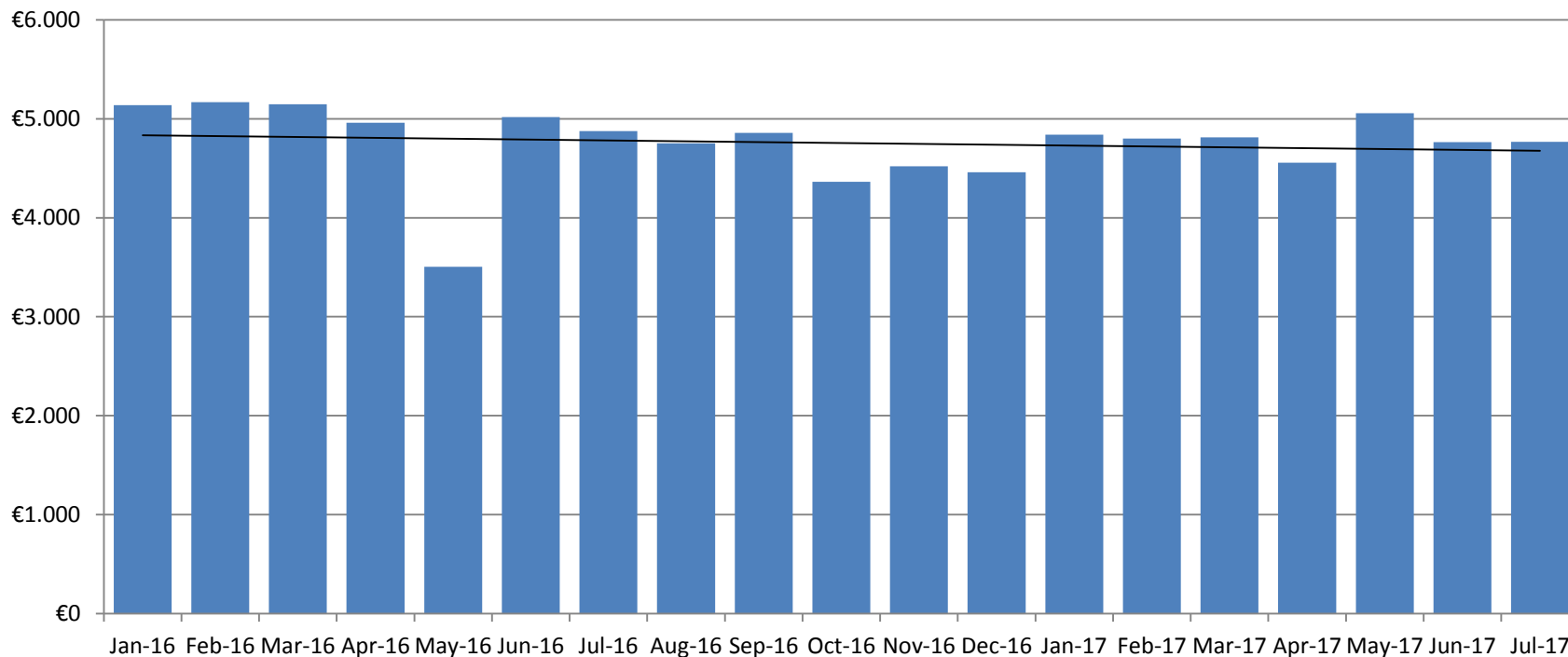


16 November 2017

Source: COMEXT

## Exports from EU27 to UK (from Jan 2016 to July 2017)

Unit Value (EUR/t)



16 November 2017



European  
Commission

# TRADE

16 November 2017

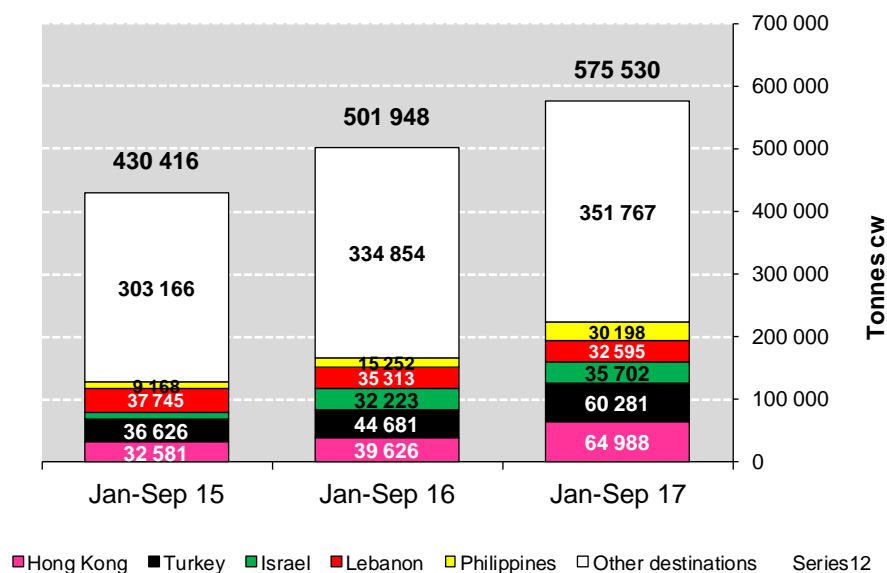
Agriculture  
and Rural  
Development

## EU exports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

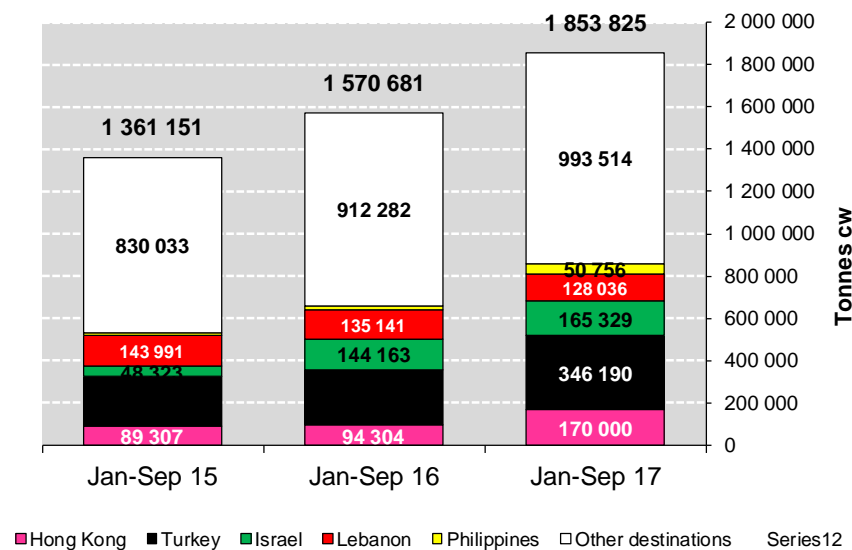
Destinations	2013		2014		2015		2016		Jan-Sep 17		Compared to Jan-Sep 16
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	28 573	6.3%	65 112	11.6%	45 198	7.6%	58 352	8.3%	64 988	11.3%	+ 64.0%
Turkey	5 086	1.1%	8 098	1.4%	57 504	9.6%	71 142	10.1%	60 281	10.5%	+ 34.9%
Israel	9 378	2.1%	8 353	1.5%	18 851	3.2%	41 616	5.9%	35 702	6.2%	+ 10.8%
Lebanon	24 007	5.3%	37 984	6.8%	50 288	8.4%	47 042	6.7%	32 595	5.7%	- 7.7%
Philippines	2 730	0.6%	11 839	2.1%	13 053	2.2%	24 247	3.5%	30 198	5.2%	+ 98.0%
Ghana	40 878	9.0%	33 255	5.9%	37 364	6.3%	35 340	5.0%	29 896	5.2%	+ 14.6%
Ivory Coast	21 619	4.8%	28 839	5.2%	35 742	6.0%	36 713	5.2%	28 937	5.0%	+ 9.9%
Bosnia-Herz.	24 068	5.3%	34 104	6.1%	39 896	6.7%	38 935	5.5%	26 539	4.6%	- 3.6%
Libya	17 778	3.9%	14 280	2.6%	19 691	3.3%	29 714	4.2%	21 764	3.8%	- 1.7%
Switzerland	26 347	5.8%	26 634	4.8%	26 019	4.4%	25 655	3.7%	20 905	3.6%	+ 8.0%
Algeria	25 911	5.7%	18 499	3.3%	16 085	2.7%	25 004	3.6%	20 863	3.6%	+ 20.0%
Russia	72 281	16.0%	96 928	17.3%	13 546	2.3%	16 433	2.3%	16 366	2.8%	+ 70.6%
Norway	10 222	2.3%	7 879	1.4%	19 123	3.2%	18 364	2.6%	12 146	2.1%	- 21.8%
Vietnam	3 175	0.7%	6 410	1.1%	11 627	1.9%	22 252	3.2%	11 934	2.1%	- 24.3%
Egypt	2 592	0.6%	2 763	0.5%	9 805	1.6%	15 958	2.3%	9 485	1.6%	- 26.7%
Angola	10 589	2.3%	14 587	2.6%	9 643	1.6%	13 549	1.9%	8 921	1.6%	+ 9.1%
For.JRep.Mac	10 577	2.3%	11 370	2.0%	12 561	2.1%	11 781	1.7%	8 849	1.5%	- 1.7%
Other Destinations	116 726	25.8%	132 305	23.7%	160 282	26.9%	169 916	24.2%	135 162	23.5%	
Extra-EU	452 537		559 238		596 278		702 013		575 530		
% change			+ 24%		+ 7%		+ 18%		+ 14.7%		

## EU exports of beef and live animals: Trade figures (COMEXT)

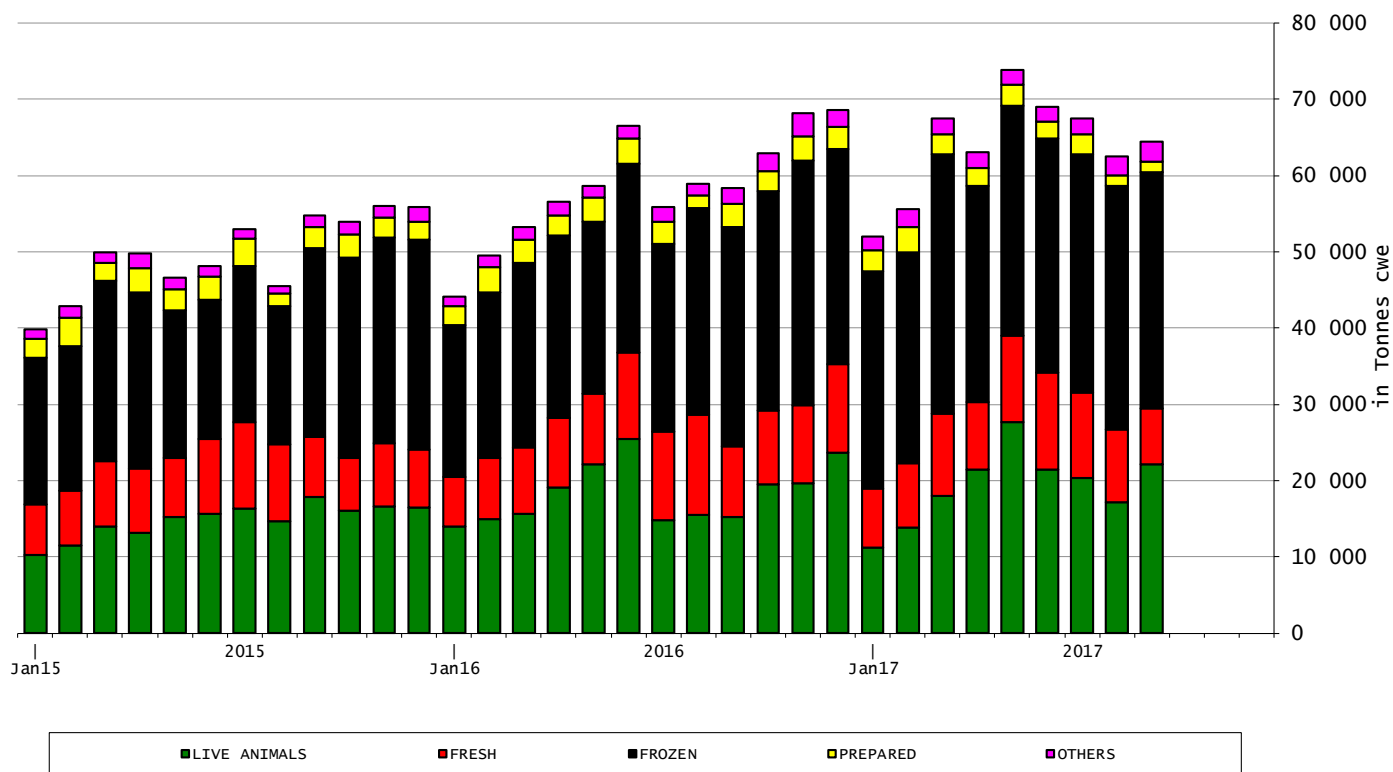
EU EXPORTS of Beef & Veal (Tonnes cwe)



EU EXPORTS of Beef & Veal (1000 EUR)



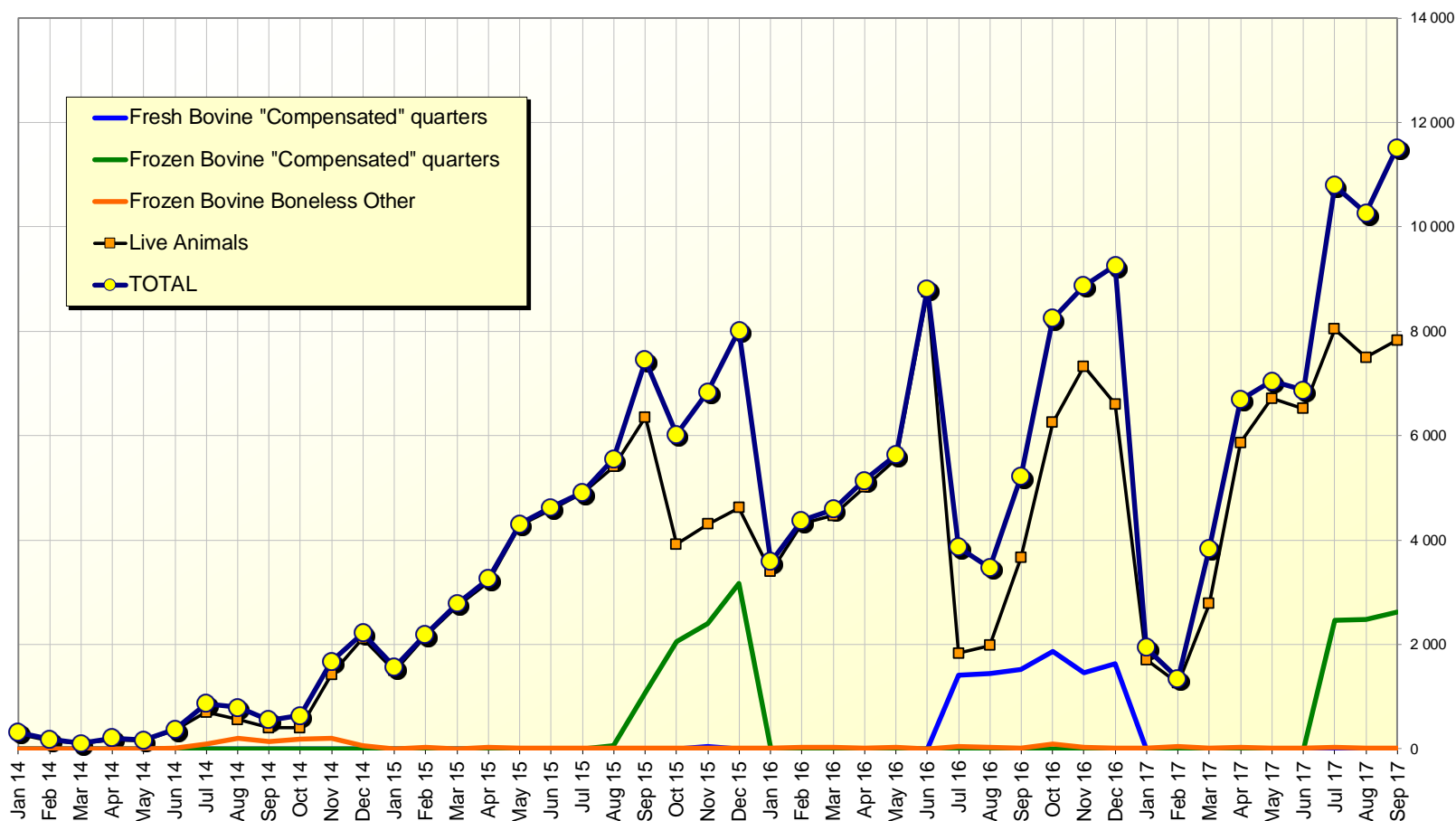
## EU-28 Exports of BEEF products



16 November 2017

### EU beef Exports to TURKEY

Trade figures (COMEXT data) *tonnes cwe*

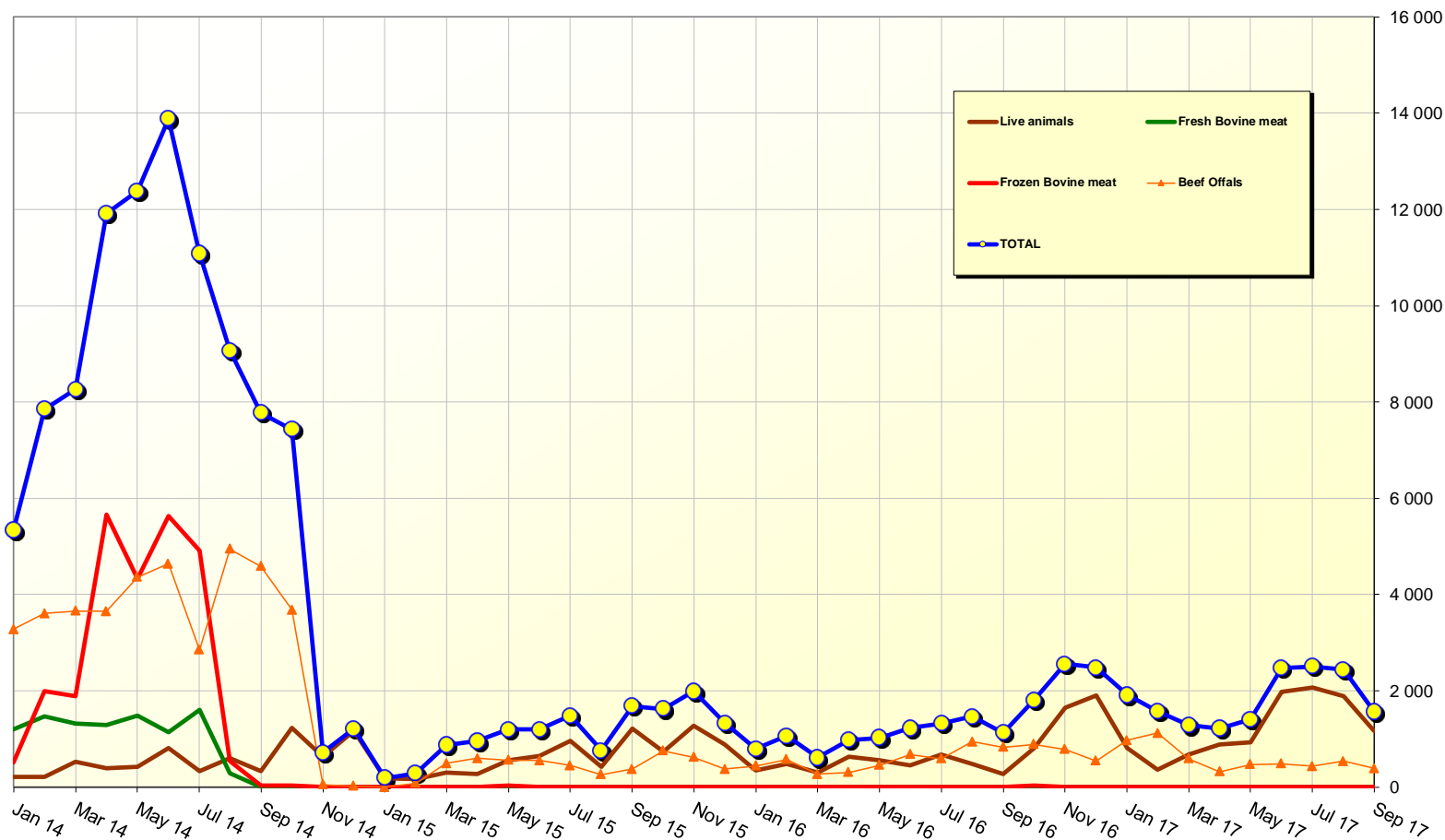


16 November 2017



European  
Commission

## EU beef Exports to RUSSIA Trade figures (COMEXT data) *tonnes cwe*

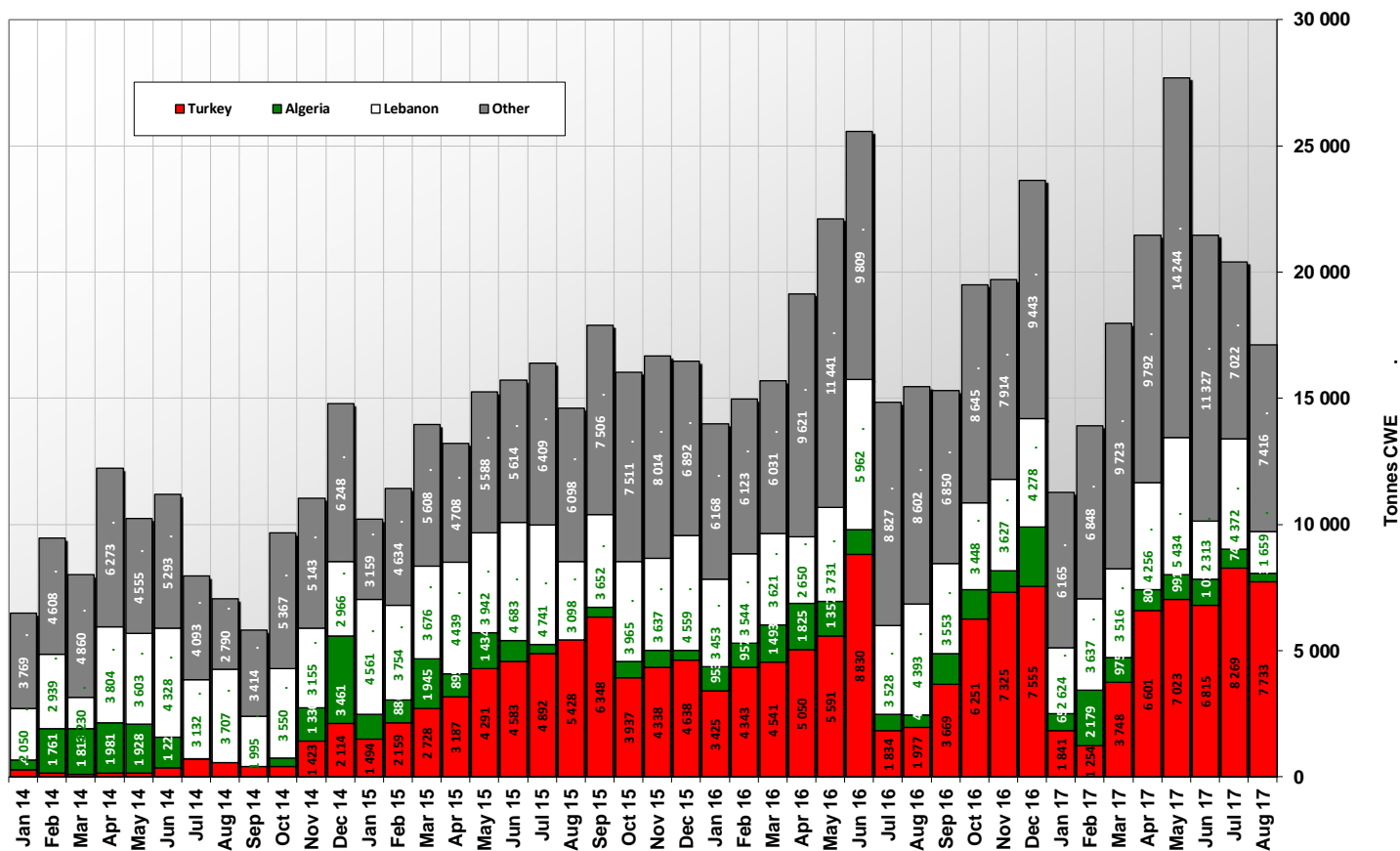


16 November 2017



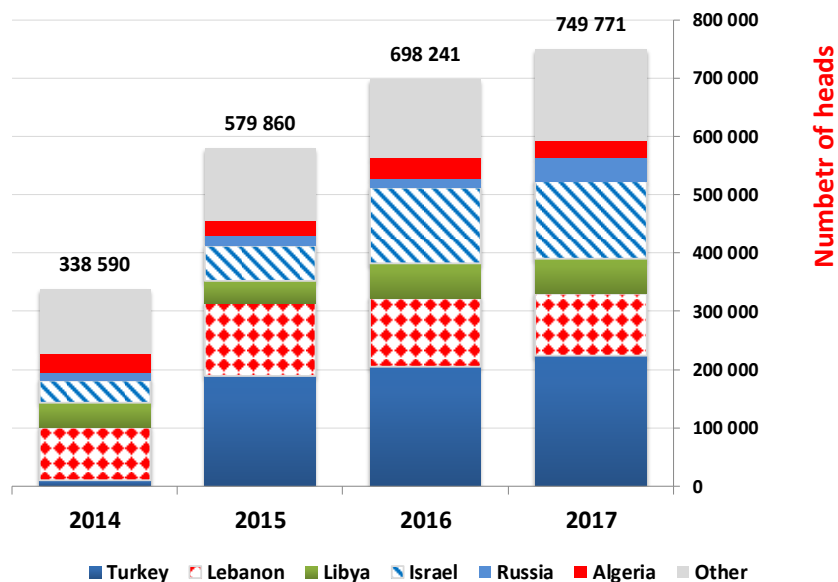
## EU-28 Exports of LIVE Bovine Animals

(Source COMEXT - Tonnes cwe)

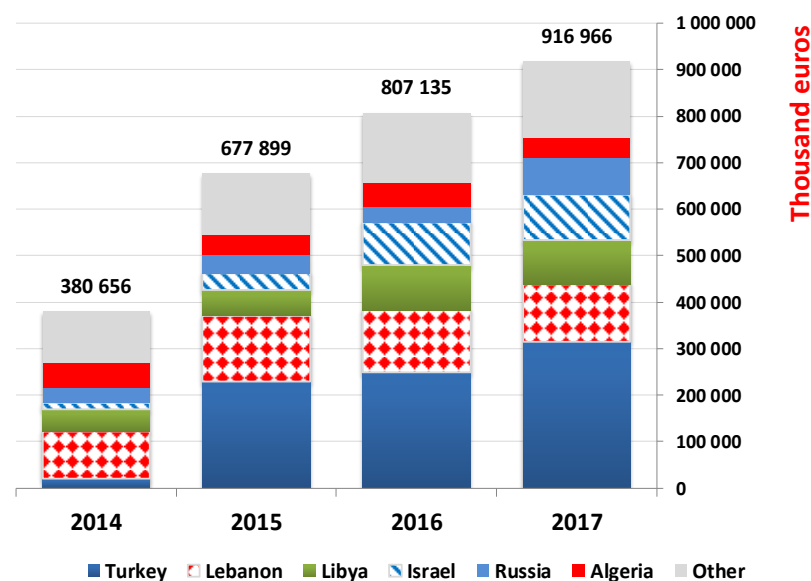


16 November 2017

EU Exports of BEEF live animals by partner for the period Jan-Sep 2017



EU Exports of BEEF live animals by partner for the period Jan-Sep 2017





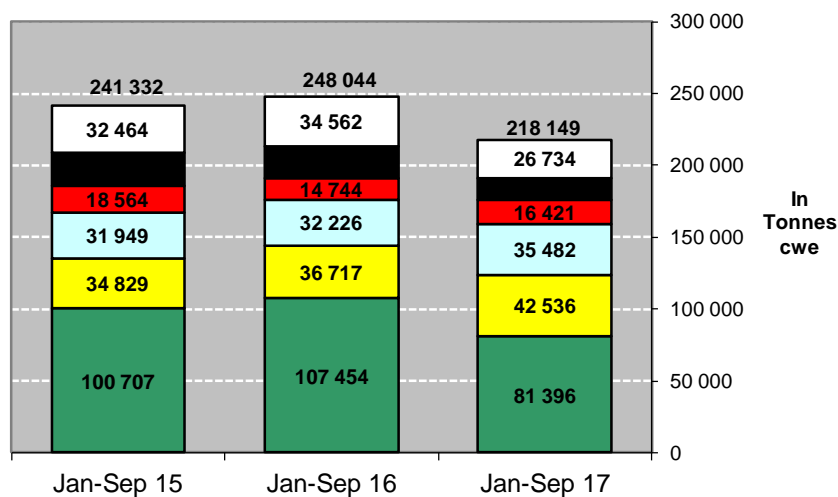
## EU imports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Origins	2013		2014		2015		2016		Jan-Sep 17		Compared to Jan-Sep 16
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	145 435	43.5%	144 259	43.4%	136 803	42.3%	140 592	42.1%	81 396	37.3%	- 24.3%
Uruguay	51 377	15.4%	49 043	14.8%	46 287	14.3%	56 708	17.0%	42 536	19.5%	+ 15.8%
Argentina	47 976	14.3%	42 074	12.7%	42 149	13.0%	43 557	13.0%	35 482	16.3%	+ 10.1%
USA	22 297	6.7%	23 234	7.0%	24 132	7.5%	20 503	6.1%	16 421	7.5%	+ 11.4%
Australia	28 074	8.4%	32 653	9.8%	30 884	9.6%	27 794	8.3%	15 581	7.1%	- 30.3%
New Zealand	13 827	4.1%	14 432	4.3%	11 380	3.5%	10 056	3.0%	6 289	2.9%	- 19.9%
Namibia	11 113	3.3%	9 994	3.0%	12 112	3.7%	10 685	3.2%	5 548	2.5%	- 37.3%
Paraguay	0	0.0%	0	0.0%	1 915	0.6%	5 947	1.8%	4 750	2.2%	+ 5.6%
Botswana	6 280	1.9%	6 424	1.9%	9 258	2.9%	9 382	2.8%	3 969	1.8%	- 43.5%
Switzerland	4 284	1.3%	5 456	1.6%	5 090	1.6%	5 498	1.6%	3 622	1.7%	- 5.3%
Serbia	619	0.2%	425	0.1%	439	0.1%	557	0.2%	465	0.2%	+ 22.2%
Japan	3	0.0%	100	0.0%	359	0.1%	578	0.2%	450	0.2%	+ 18.4%
Canada	965	0.3%	780	0.2%	428	0.1%	425	0.1%	371	0.2%	+ 30.4%
Ukraine	0	0.0%	570	0.2%	20	0.0%	317	0.1%	332	0.2%	+ 91.6%
Chile	537	0.2%	875	0.3%	713	0.2%	606	0.2%	228	0.1%	- 52.2%
Norway	201	0.1%	347	0.1%	481	0.1%	277	0.1%	171	0.1%	- 12.5%
Algeria	0	0.0%	0	0.0%	21	0.0%	0	0.0%	102	0.0%	+++
Other Origins	1 640	0.5%	1 695	0.5%	575	0.2%	849	0.3%	437	0.2%	
Extra-EU	334 630		332 362		323 043		334 331		218 149		
% change				- 1%		- 3%		+ 3%		- 12.1%	

16 November 2017

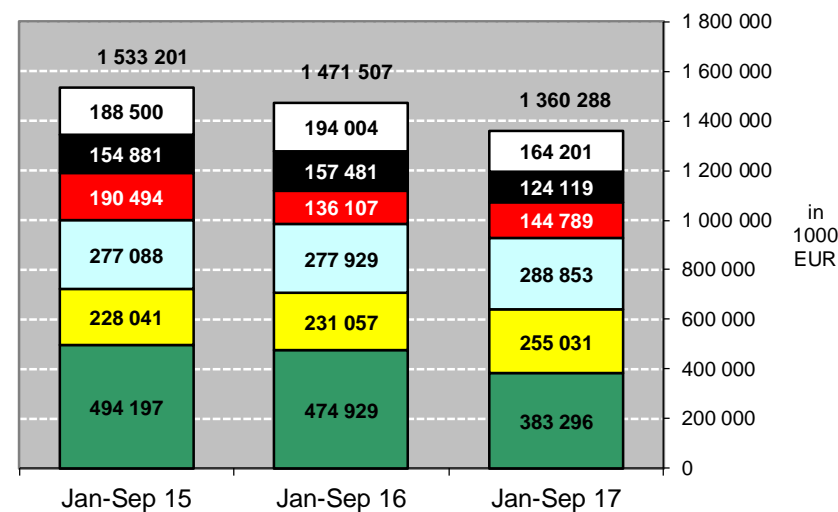
## EU imports of beef and live animals (2): Trade figures (COMEXT)

IMPORTS of Beef & Veal into EU (Tonnes cwe)



■ Brazil ■ Uruguay ■ Argentina ■ USA ■ Australia ■ Other origins

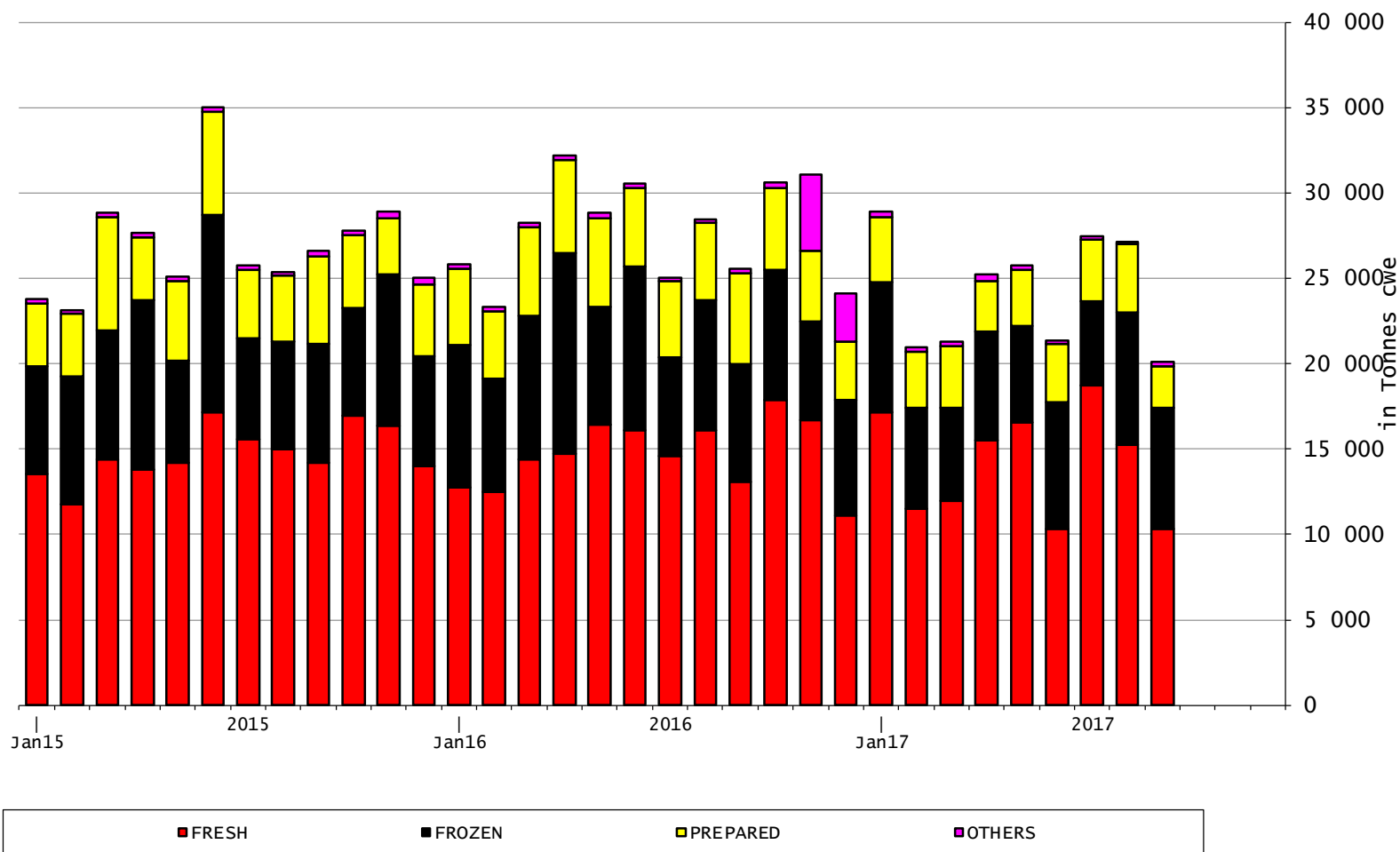
IMPORTS of Beef & Veal into EU (1000 EUR)



■ Brazil ■ Uruguay ■ Argentina ■ USA ■ Australia ■ Other origins



## EU-28 Imports of BEEF products

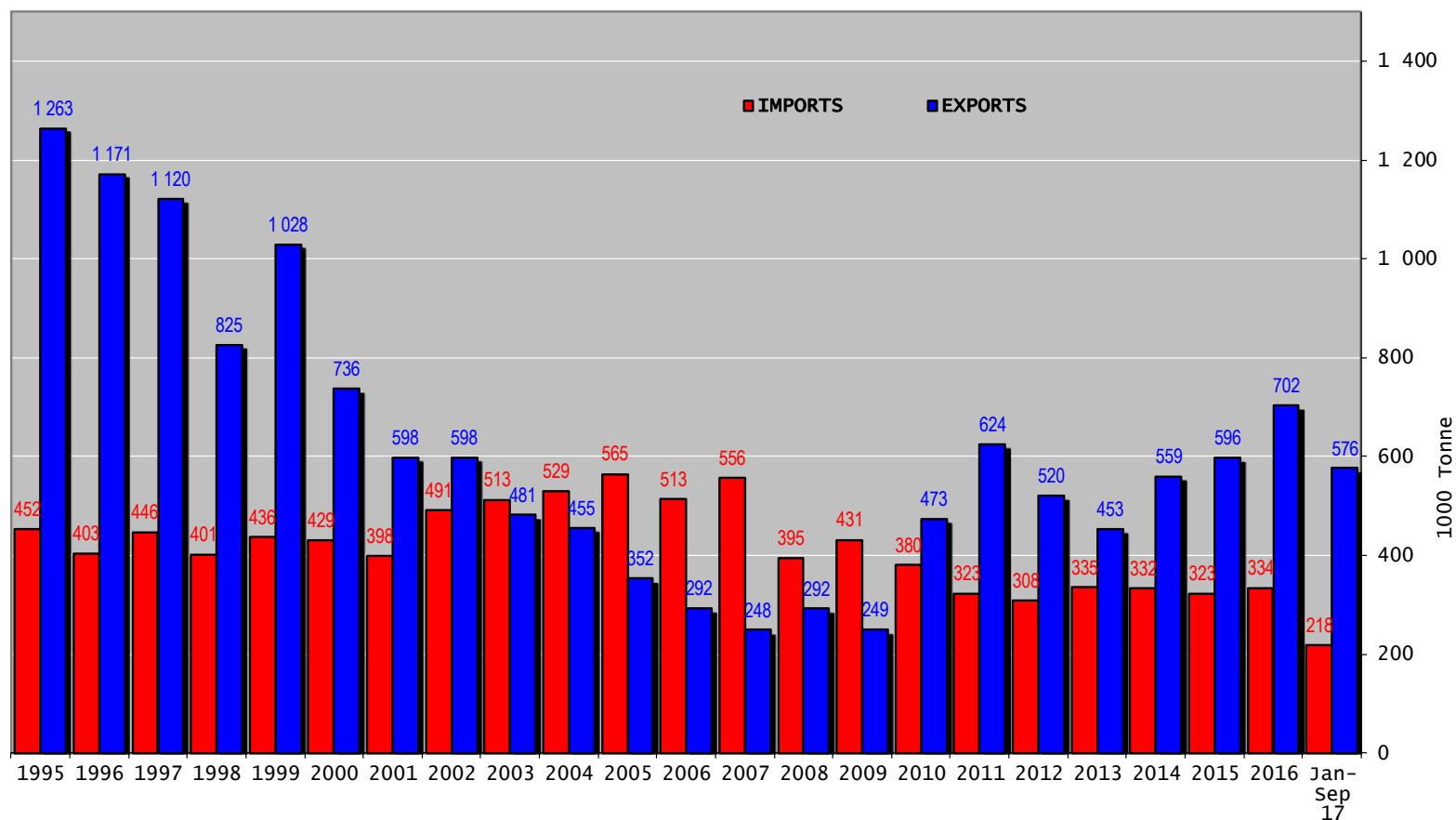


16 November 2017

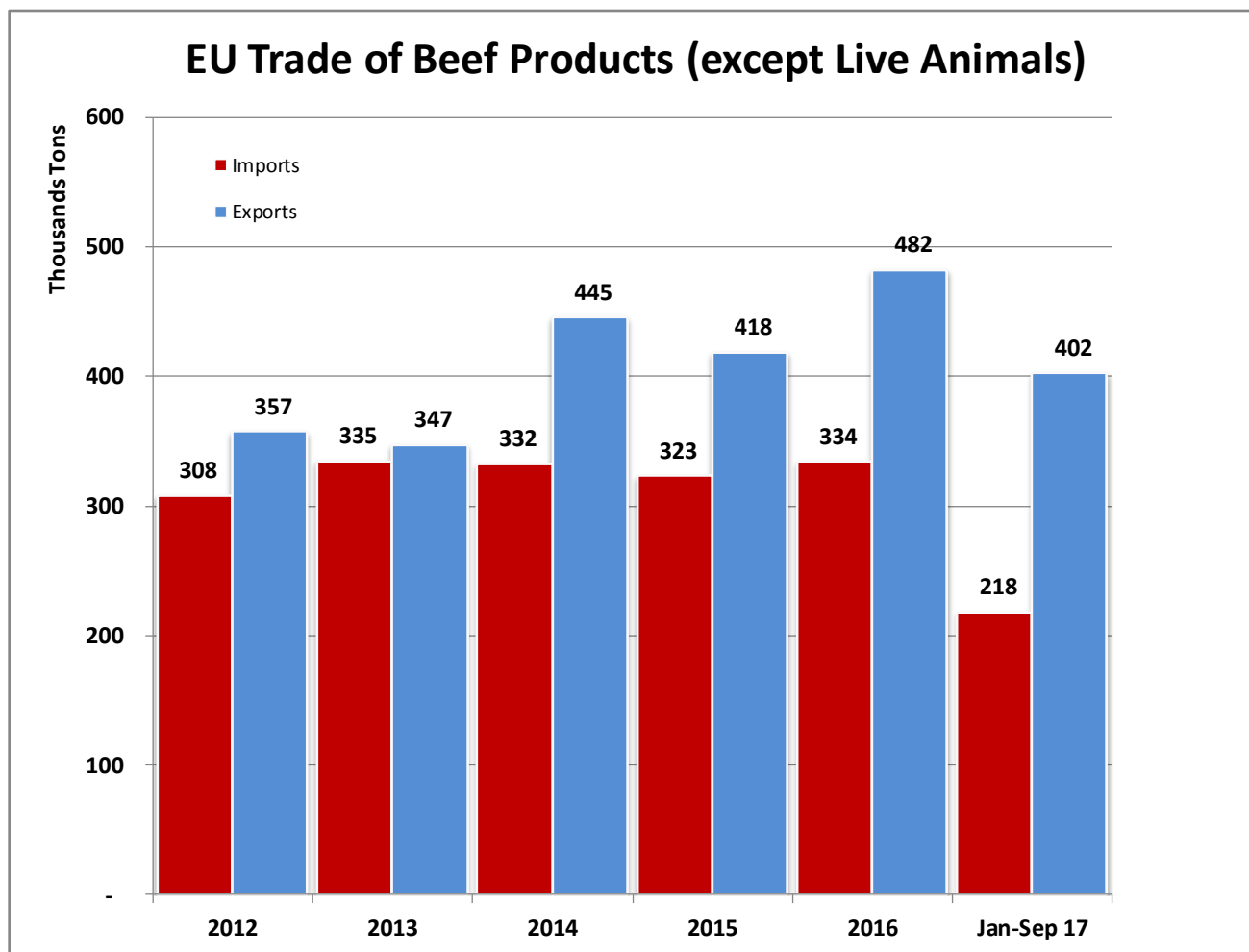


European  
Commission

## Trade balance of beef and live animals



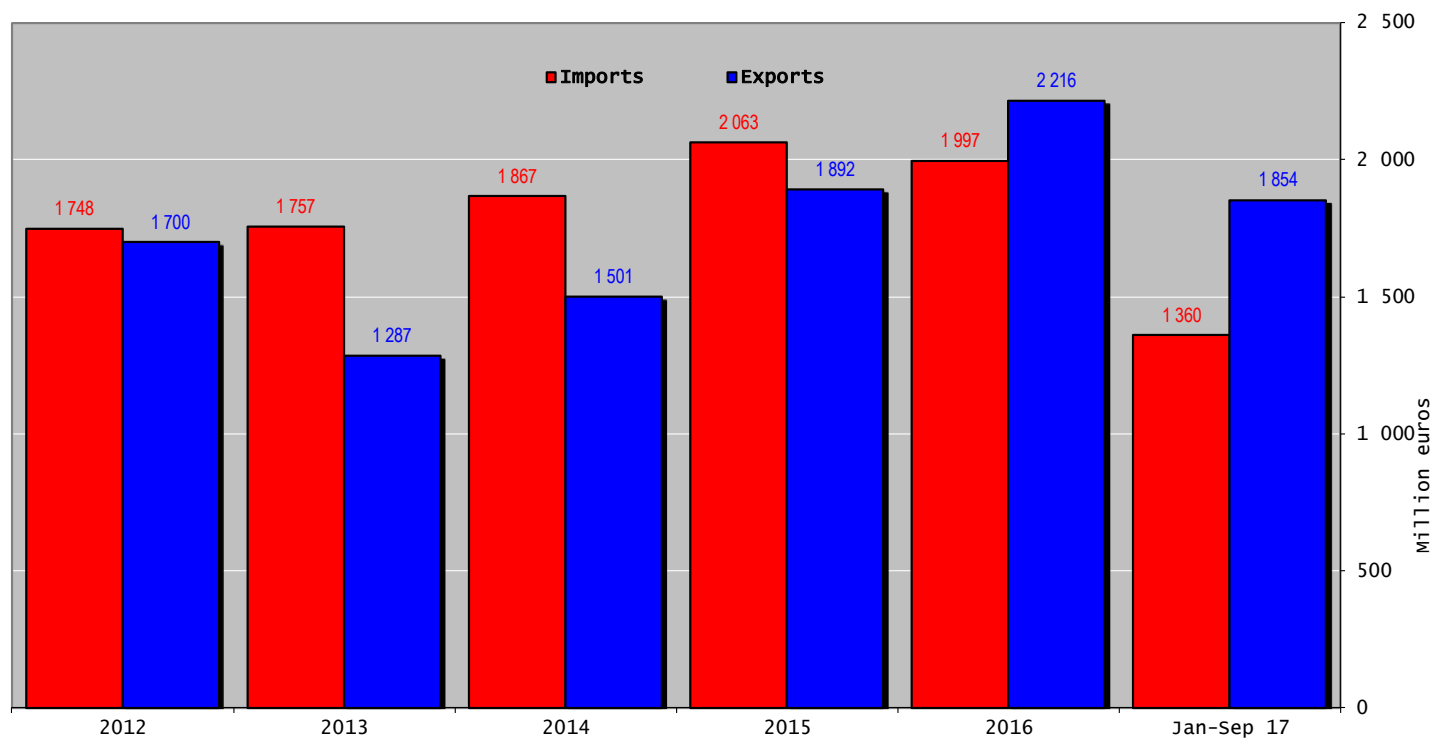
16 November 2017



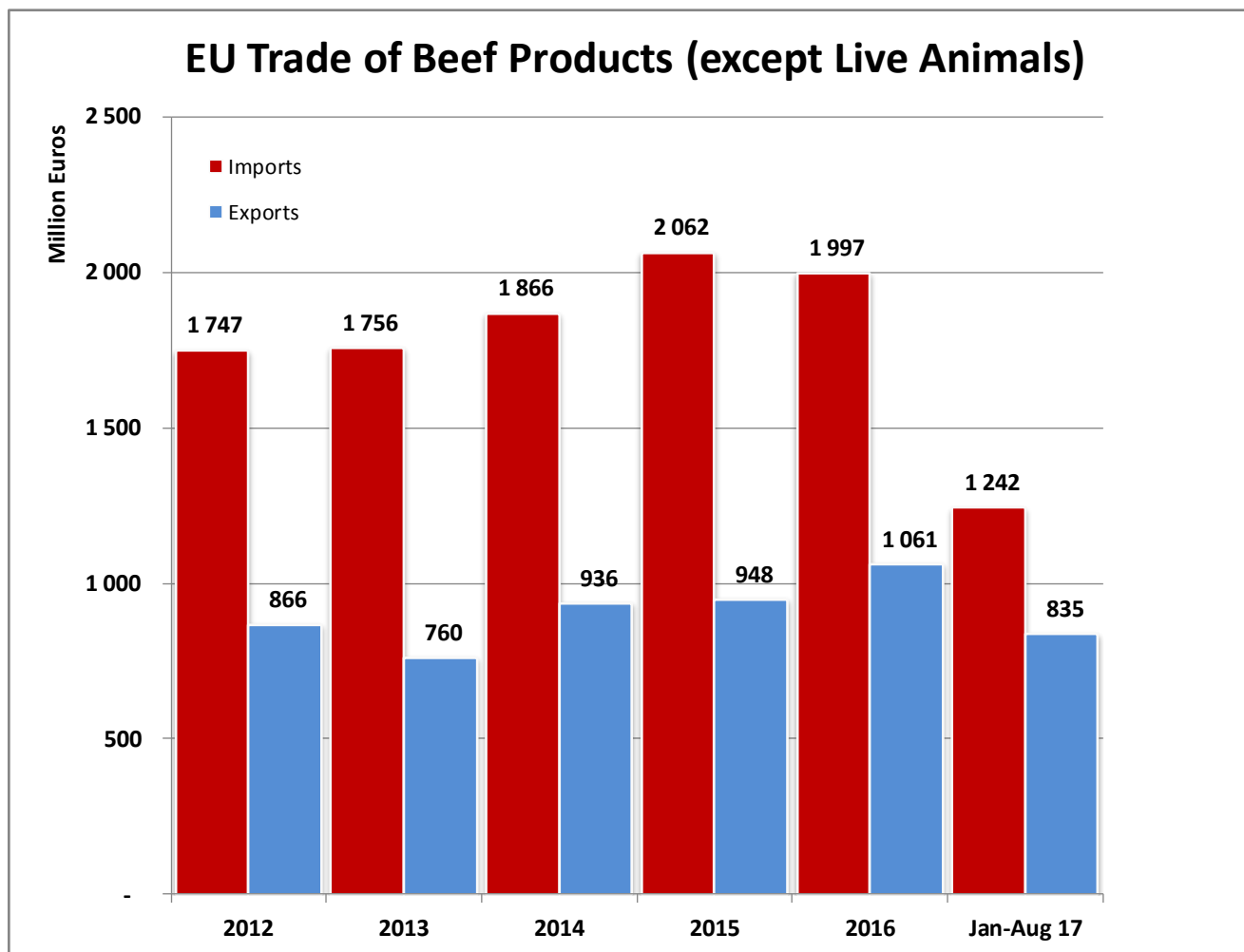
16 November 2017



## Trade balance of beef and live animals

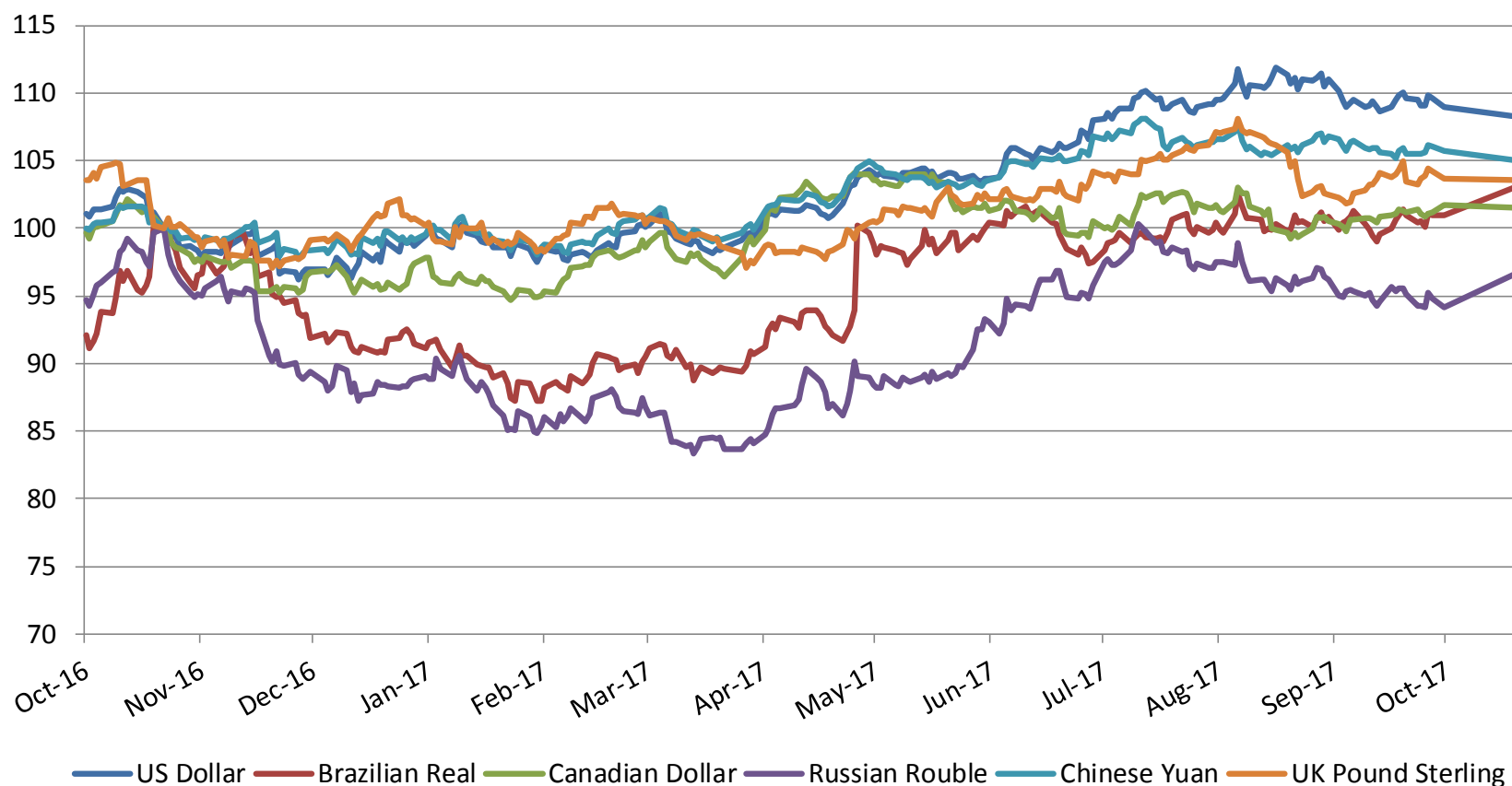


16 November 2017



16 November 2017

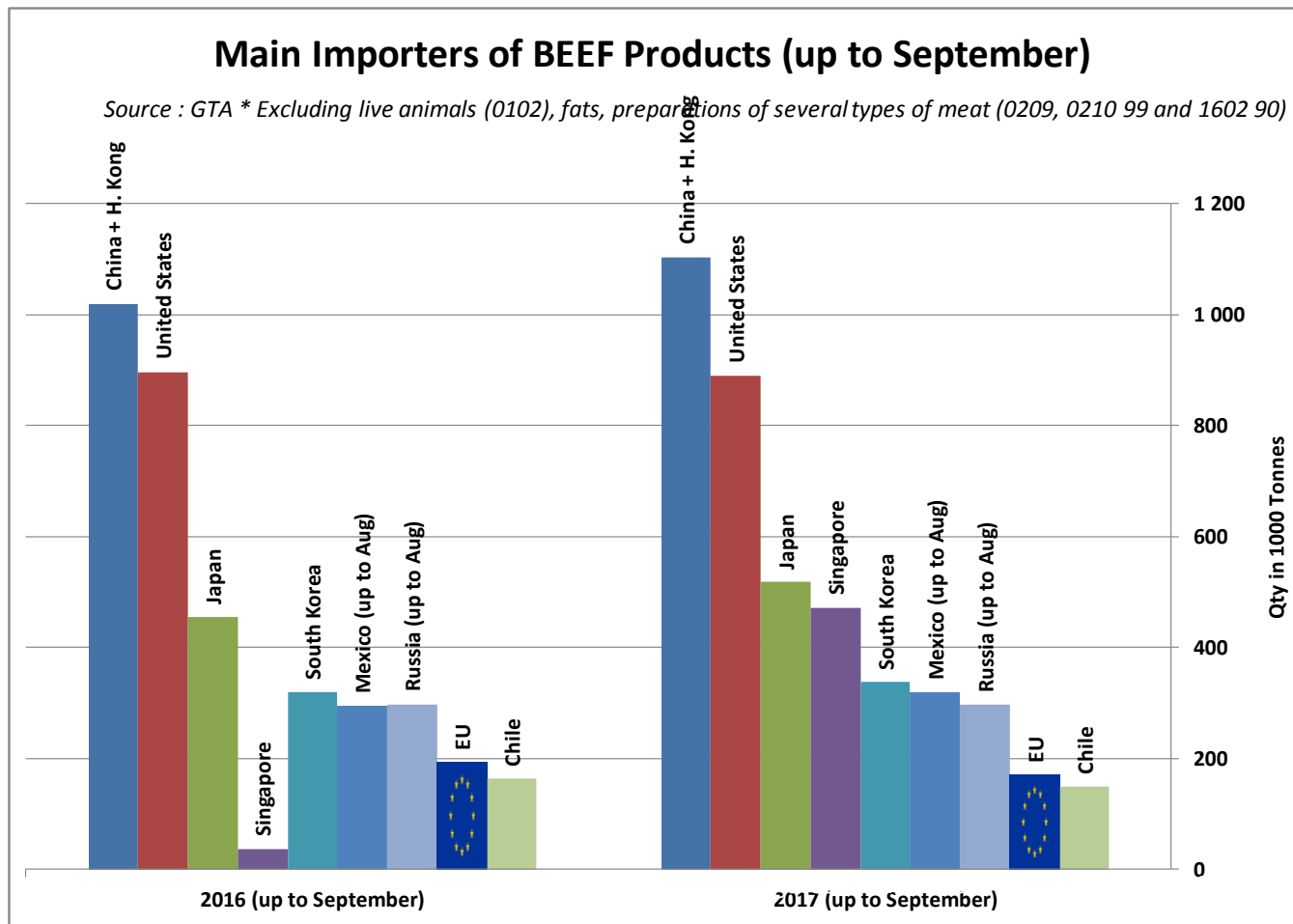
### Index of daily exchange rates of the main trading partners compared to the Euro



16 NOVEMBER 2017

Source : GTA

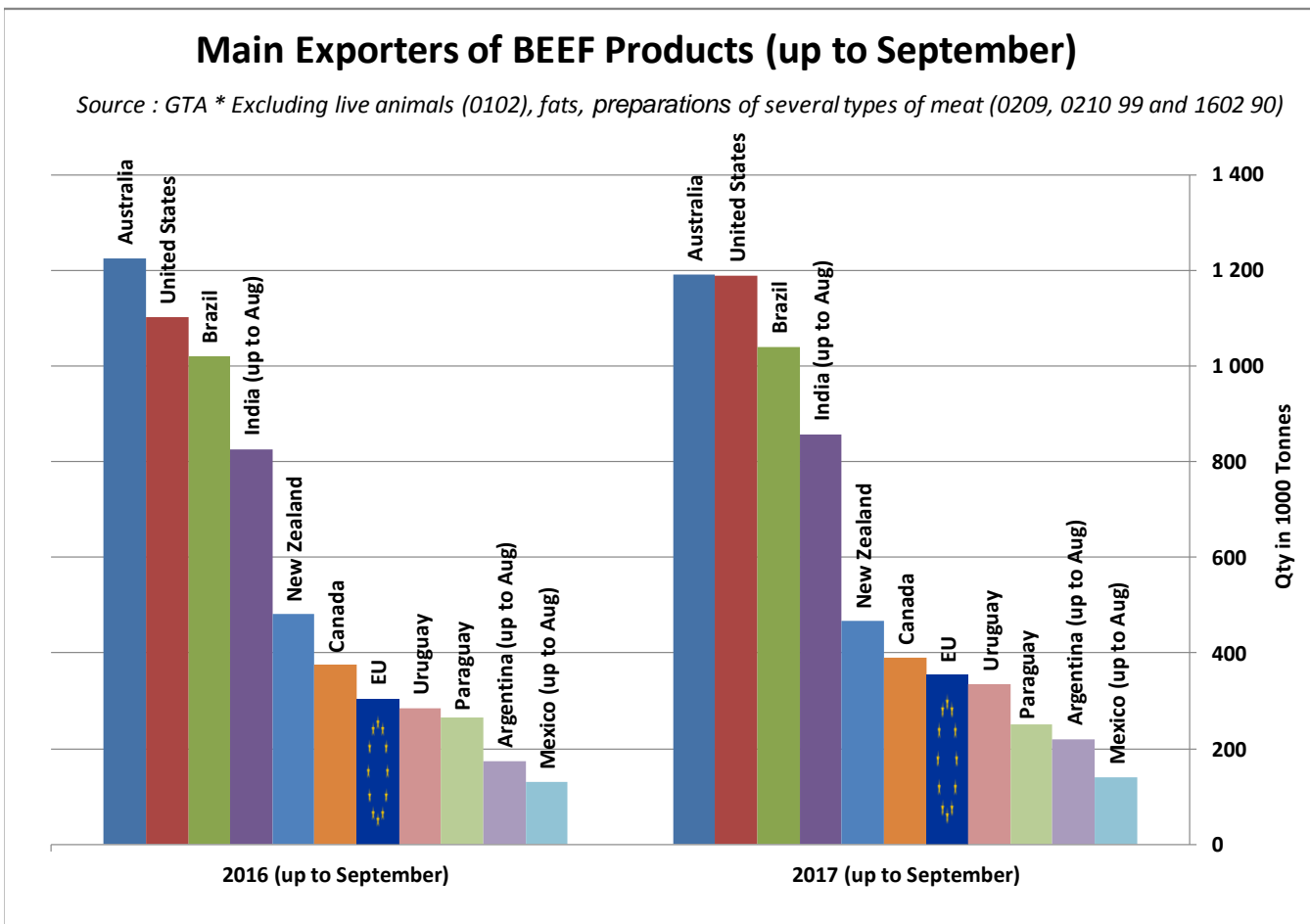
\* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



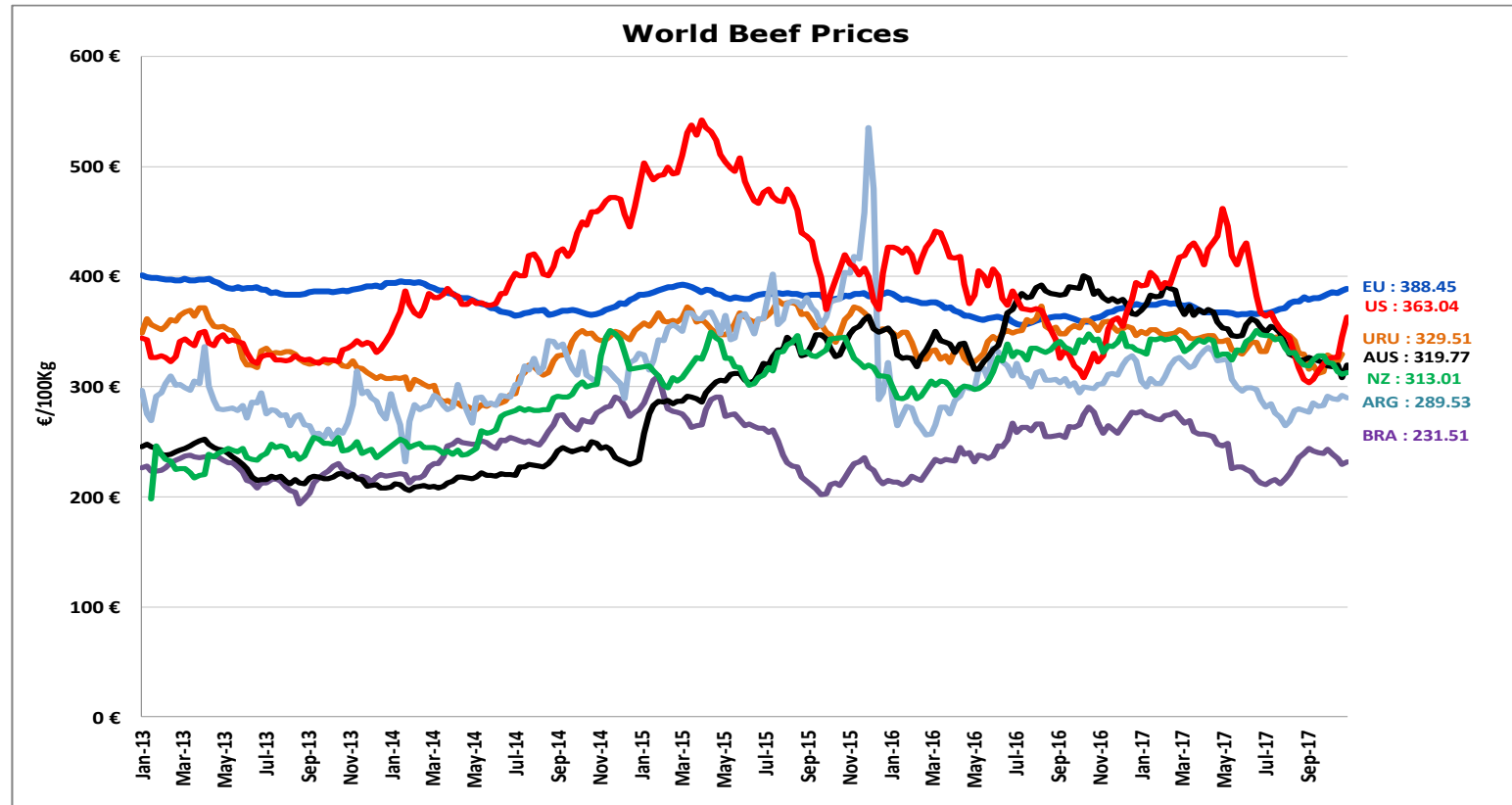
16 November 2017

Source : GTA

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



16 November 2017



ECB <http://sdw.ecb.europa.eu/browse.do?node=2018794>  
 US <https://www.marketnews.usda.gov/mnp/lis-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](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)

16 November 2017

# High Quality Beef Import Quotas



Hilton Quota		Regulation (EU) N° 593/2013								
		Quantity allocated (Tons)	2014/2015		2015/2016		2016/2017		2017/2018*	
			Use		Use		Use		Use	
09.4001	Australia	2 250								
09.4004	Argentina	200	9.46	4.73%	12.21	6.11%	12.75	6.38%	9.01	4.51%
09.4450	Argentina	29 500	22 867.03	77.52%	22 350.61	75.76%	23 111.89	78.35%	7 137.98	24.20%
09.4451	Australia	7 150	6 815.93	95.33%	6 749.85	94.40%	4 051.04	56.66%	1 865.85	26.10%
09.4452	Uruguay	6 376	6 280.98	98.51%	6 249.09	98.01%	6 365.55	99.84%	1 955.60	30.67%
09.4453	Brazil	10 000	7 989.89	79.90%	9 289.17	92.89%	8 572.40	85.72%	1 677.43	16.77%
09.4454	New Zealand	1 300	1 299.45	99.96%	1 299.95	100.00%	1 161.63	89.36%	354.71	27.29%
09.4002	Canada/US	11 500	353.46	3.07%	292.16	2.54%	421.40	3.66%	370.51	3.22%
09.4455	Paraguay	1 000	12.13	1.21%	915.63	91.56%	982.60	98.26%	376.98	37.70%
Total Beef		66 826	45 618.87	68.27%	47 146.46	70.55%	44 666.51	66.84%	13 739.06	20.56%
Total Buffalo		2 450	9.46	0.39%	12.21	0.50%	12.75	0.52%	9.01	0.37%
Total		69 276	45 628.33	65.86%	47 158.67	68.07%	44 679.26	64.49%	13 748.07	19.85%

\* up to 30/09/2017

16 November 2017

# High Quality Beef Import Quotas



European  
Commission

Quota erga omnes

Regulation (EU) No 481/2012

	2013-Q3	2013-Q4	2014-Q1	2014-Q2	TOTAL
Period 2013-2014	10 198 942	10 493 437	10 191 527	10 282 860	41 166 765
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	84.64%	87.08%	84.58%	85.33%	85.41%

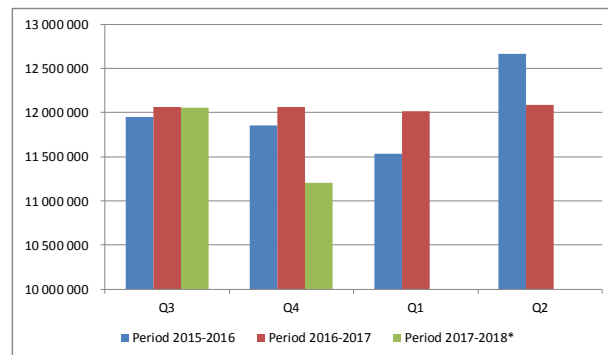
	2014-Q3	2014-Q4	2015-Q1	2015-Q2	TOTAL
Period 2014-2015	11 842 700	11 745 231	11 353 830	12 457 389	47 399 150
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	98.28%	97.47%	94.22%	103.38%	98.34%
Available after transfer	12 050 000	12 257 300	12 562 069	13 258 240	
	98.28%	95.82%	90.38%	93.96%	

	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	12 088 771	48 226 423
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	11 203 095			23 254 910
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	100.00%	92.97%	0.00%	0.00%	48.25%
Available after transfer	12 050 000	12 048 185	12 895 090	24 945 090	
	100.00%	92.99%	0.00%	0.00%	

\* Until 14.11.2017



16 November 2017

# FORECASTS

16 November 2017

# Forecast Summary



	2015	2016	2017	2018
<b>EU.15 PRODUCTION</b> ( 1000T )	+ 2.57% 6 806	+ 2.36% 6 967	- 0.06% 6 963	+ 0.00% 6 986
<b>EU.15 CONSUMPTION</b> ( 1000T )	+ 8.47% 7 185	+ 0.59% 7 227	+ 0.33% 7 251	+ 0.15% 7 262
<b>BALANCE</b>	- 379	- 260	- 288	- 276
<b>EU.13 PRODUCTION</b> ( 1000T )	+ 12.43% 777	+ 7.14% 832	+ 11.57% 929	+ 0.49% 933
<b>EU.13 CONSUMPTION</b> ( 1000T )	- 7.30% 389	+ 20.12% 468	- 3.16% 453	- 1.83% 445
<b>BALANCE</b>	387	364	476	488
<b>EU.28 PRODUCTION</b> ( 1000T )	+ 3.50% 7 583	+ 2.85% 7 799	+ 1.19% 7 891	+ 0.35% 7 919
<b>EU.28 CONSUMPTION</b> ( 1000T )	+ 7.53% 7 574	+ 1.59% 7 695	+ 0.12% 7 704	+ 0.03% 7 706
<b>BALANCE</b>	8	104	187	213
<b>EU - CARCASS PRICES</b>	2015	2016	2017	2018
<b>ADULT MALE BOVINES</b> ( €/100 kg )	+ 3.4% 386.3	- 4.02% 370.8	+ 3.43% 383.5	- 2.87% 372.5
<b>COWS</b> ( €/100 kg )	- 1.1% 283.6	- 5.66% 267.5	+ 5.90% 283.3	+ 0.73% 285.4

Sources : EStat New Cronos, Member States

16 November 2017

# Short Term Outlook



- *Short-term outlook for EU agricultural markets (Autumn 2017):*

[https://ec.europa.eu/agriculture/sites/agriculture/files/markets-and-prices/short-term-outlook/current\\_en.pdf](https://ec.europa.eu/agriculture/sites/agriculture/files/markets-and-prices/short-term-outlook/current_en.pdf)



The image shows the cover of the report "Short-term outlook for EU agricultural markets in 2017 and 2018". The cover has a green header with the European Commission logo. Below the header, there is a grid of twelve small images showing various agricultural products and animals. The title "Short-term outlook for EU agricultural markets in 2017 and 2018" is prominently displayed. To the left of the title, the text "Autumn 2017" is written vertically. Below the title, there is a "HIGHLIGHTS" section with four bullet points. To the left of the highlights, there is a "Contents" section with a list of eight items. Below the contents, there is a paragraph of text about the report. At the bottom right, there is a note about the report's assumptions and a photo credit.

**Autumn 2017**

**Short-term outlook  
for EU agricultural markets  
in 2017 and 2018**

**HIGHLIGHTS**

- ◆ EU cereal harvest just below average but ample global supply
- ◆ Significant increase of EU sugar beet-planted area in this first year without quotas
- ◆ Strong global and EU demand for dairy products and stable milk prices
- ◆ High exports of beef and sheep, while lower pig and poultry supply causes a dip in exports and higher prices
- ◆ Rise of the EUR against the USD to affect EU competitiveness on the world market

**Contents**

1. Macro-economic outlook
2. Arable crops
3. Olive oil
4. Wine
5. Dairy
6. Meat
7. Statistical annex
8. Methodology

This report presents the outlook for 2017-2018 for arable crops and meat and dairy markets in the EU. It is the result of analysis by market experts in the European Commission's Directorate-General for Agriculture and Rural Development. It is based on data available up to 15 September 2017. The next issue is due in winter 2018.

Directorate-General for Agriculture and Rural Development – Short-term outlook – No 19

[http://ec.europa.eu/agriculture/markets-and-prices/index\\_en.htm](http://ec.europa.eu/agriculture/markets-and-prices/index_en.htm)

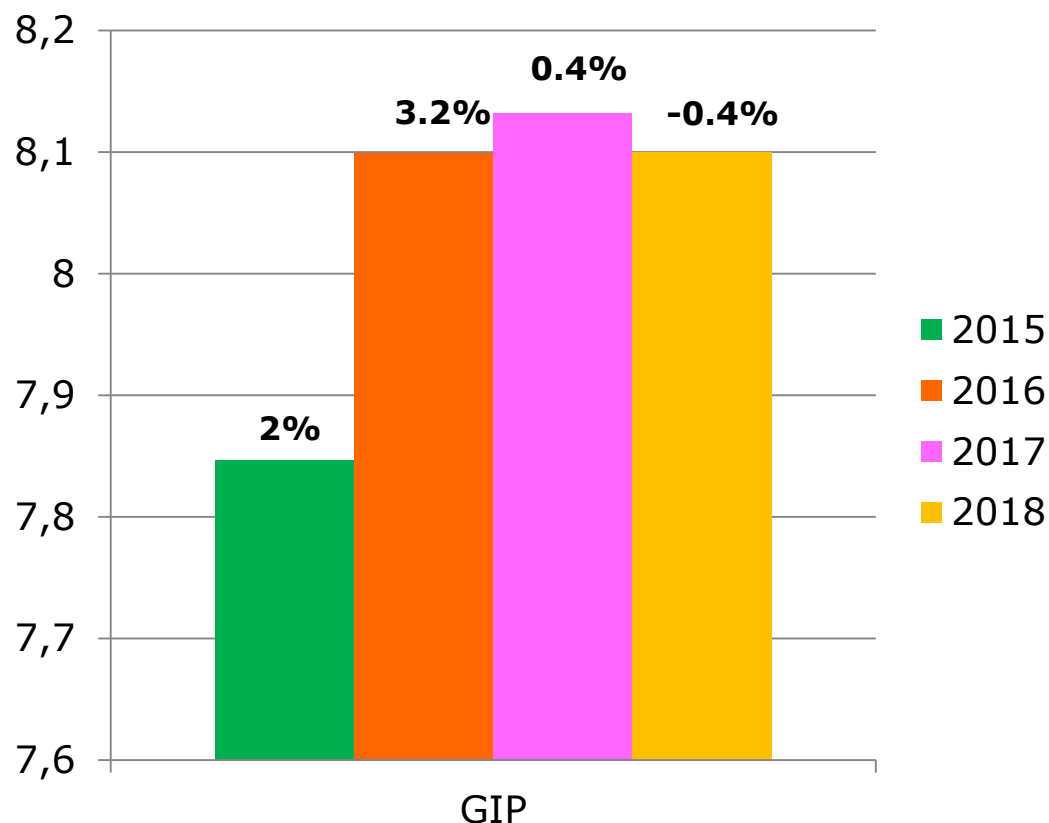
**Note:** This report has been drawn up for the EU-28 under constant policy assumptions, with the Russian import ban assumed to be in place until the end of 2018.

Photos copyright: oilseeds-Nick Fletcher, oilseed-Kristina Krishny, cereals-Best Community, wine-speleolog, sugarbeet-Fotolia, cow-Frank Luetke, pig-Fotolia, dairy products-Food Town, poultry-Fotolia, sheep-Car.I

**Agriculture and Rural Development**

16 November 2017

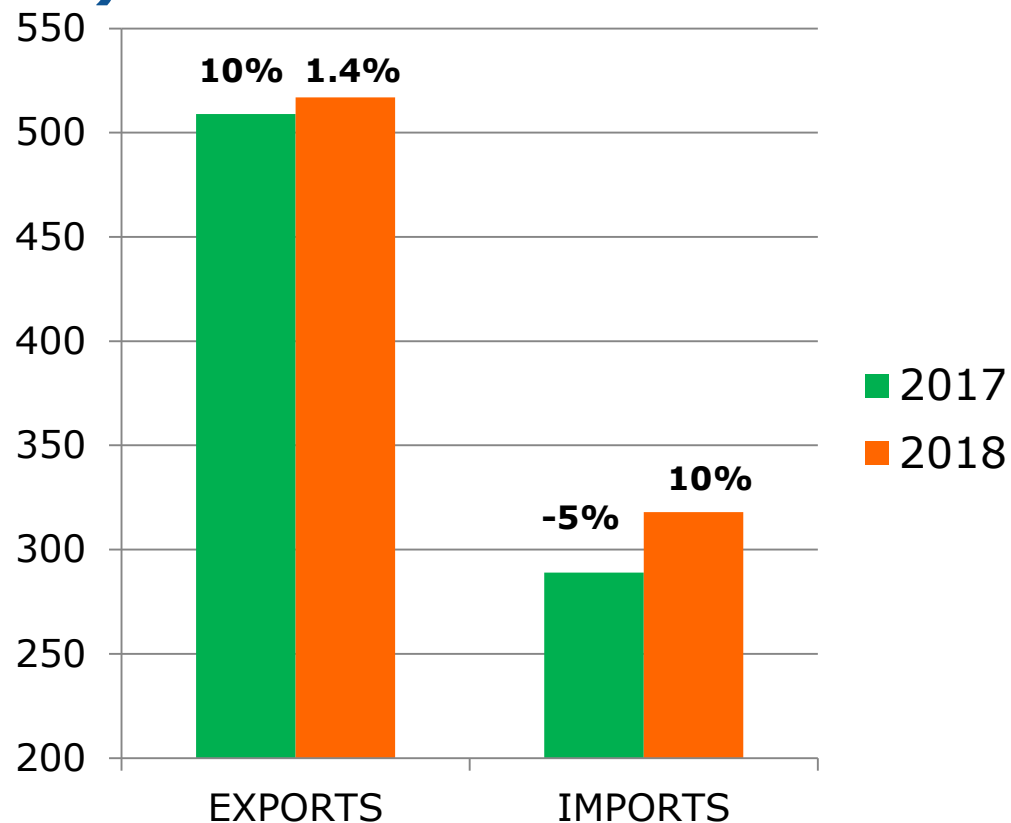
## Changes in EU production 2015-2018 (million t)



16 November 2017

*Note: the production of beef&veal includes the net trade of live animals.*

## Changes in EU trade 2016-2018 ('000 t)



16 November 2017  
Note: Trade in processed meat includes live animals.