



Civil dialogue group on animal products

Beef and veal

18 October 2021

LIVESTOCK

JUNE SURVEY

EU EVOLUTION TOTAL BOVINE

| May/Jun 1000 Hd | TOT LIVESTOCK | | | | %Var 2021 2020 | BOVINE < 1 Year | | | | %Var 2021 2020 | BOVINE 1-2 Year | | | | %Var 2021 2020 | BOVINE > 2 Year | | | | %Var 2021 2020 |
|--------------------|---------------|--------|--------|--------|----------------------|-----------------|--------|--------|--------|----------------------|-----------------|--------|--------|--------|----------------------|-----------------|--------|--------|--------|----------------------|
| | 2018 | 2019 | 2020 | 2021 | | 2018 | 2019 | 2020 | 2021 | | 2018 | 2019 | 2020 | 2021 | | 2018 | 2019 | 2020 | 2021 | |
| BE | 2 450 | 2 406 | 2 388 | 2 342 | -1.9% | 710 | 706 | 716 | 708 | -1.0% | 492 | 475 | 471 | 471 | -0.1% | 1 247 | 1 226 | 1 201 | 1 163 | -3.2% |
| BG | | | | | | | | | | | | | | | | | | | | |
| CZ | | | | | | | | | | | | | | | | | | | | |
| DK | 1 560 | 1 512 | 1 517 | 1 503 | -0.9% | 538 | 510 | 517 | 517 | idem | 294 | 292 | 291 | 287 | -1.4% | 729 | 710 | 709 | 699 | -1.4% |
| DE | 12 093 | 11 763 | 11 423 | 11 176 | -2.2% | 3 618 | 3 502 | 3 410 | 3 398 | -0.4% | 2 848 | 2 788 | 2 683 | 2 591 | -3.4% | 5 627 | 5 473 | 5 330 | 5 188 | -2.7% |
| EE | | | | | | | | | | | | | | | | | | | | |
| IE | 7 349 | 7 209 | 7 314 | 7 359 | +0.6% | 2 078 | 2 008 | 2 117 | 2 146 | +1.4% | 1 919 | 1 861 | 1 807 | 1 910 | +5.7% | 3 351 | 3 340 | 3 390 | 3 303 | -2.6% |
| EL | | | | | | | | | | | | | | | | | | | | |
| ES | 6 725 | 6 722 | 6 715 | 6 911 | +2.9% | 2 504 | 2 507 | 2 488 | 2 626 | +5.6% | 990 | 978 | 930 | 975 | +4.9% | 3 230 | 3 237 | 3 297 | 3 310 | +0.4% |
| FR | 18 737 | 18 470 | 18 200 | 17 863 | -1.9% | 5 125 | 5 227 | 5 144 | 5 134 | -0.2% | 3 417 | 3 229 | 3 249 | 3 158 | -2.8% | 10 195 | 10 014 | 9 808 | 9 571 | -2.4% |
| HR | | | | | | | | | | | | | | | | | | | | |
| IT | 6 170 | 6 016 | 6 116 | 6 174 | +0.9% | 1 757 | 1 746 | 1 746 | 1 762 | +0.9% | 1 466 | 1 409 | 1 458 | 1 476 | +1.2% | 2 948 | 2 861 | 2 912 | 2 936 | +0.8% |
| CY | | | | | | | | | | | | | | | | | | | | |
| LV | | | | | | | | | | | | | | | | | | | | |
| LT | | | | | | | | | | | | | | | | | | | | |
| LU | | | | | | | | | | | | | | | | | | | | |
| HU | | | | | | | | | | | | | | | | | | | | |
| MT | | | | | | | | | | | | | | | | | | | | |
| NL | 3 897 | 3 750 | 3 766 | 3 733 | -0.9% | 1 560 | 1 536 | 1 558 | 1 523 | -2.2% | 520 | 460 | 446 | 480 | +7.6% | 1 817 | 1 754 | 1 762 | 1 730 | -1.8% |
| AT | 1 907 | 1 873 | 1 844 | 1 846 | +0.1% | 606 | 596 | 588 | 596 | +1.4% | 433 | 425 | 416 | 413 | -0.7% | 869 | 853 | 841 | 838 | -0.4% |
| PL | 6 201 | 6 358 | 6 344 | 6 401 | +0.9% | 1 686 | 1 771 | 1 729 | 1 789 | +3.5% | 1 734 | 1 768 | 1 796 | 1 856 | +3.3% | 2 781 | 2 820 | 2 819 | 2 756 | -2.2% |
| PT | 1 722 | 1 712 | 1 751 | 1 723 | -1.5% | 529 | 524 | 557 | 550 | -1.4% | 274 | 267 | 264 | 252 | -4.7% | 919 | 921 | 929 | 922 | -0.8% |
| RO | 2 002 | 1 963 | 1 915 | 1 864 | -2.6% | 444 | 428 | 418 | 386 | -7.7% | 236 | 230 | 217 | 207 | -4.4% | 1 322 | 1 305 | 1 280 | 1 271 | -0.7% |
| SI | | | | | | | | | | | | | | | | | | | | |
| SK | | | | | | | | | | | | | | | | | | | | |
| FI | | | | | | | | | | | | | | | | | | | | |
| SE | 1 507 | 1 466 | 1 453 | 1 453 | -0.0% | 475 | 451 | 462 | 465 | +0.6% | 381 | 380 | 362 | 369 | +2.1% | 651 | 636 | 629 | 618 | -1.7% |
| EU | 72 320 | 71 220 | 70 747 | 70 348 | -0.6% | 21 631 | 21 512 | 21 451 | 21 600 | +0.7% | 15 003 | 14 559 | 14 389 | 14 444 | +0.4% | 35 687 | 35 149 | 34 907 | 34 304 | -1.7% |
| UK | 9 891 | 9 739 | 9 615 | | | 2 908 | 2 857 | 2 878 | | | 2 479 | 2 448 | 2 412 | | | 4 504 | 4 434 | 4 324 | | |

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2020 AND 2021

18 October 2021

LIVESTOCK

JUNE SURVEY

EU EVOLUTION TOTAL BOVINE

| May/Jun 1000 Hd | TOTAL COWS | | | | %Var 2021 2020 | DAIRY COWS | | | | %Var 2021 2020 | OTHER COWS | | | | %Var 2021 2020 |
|--------------------|------------|--------|--------|--------|----------------------|------------|--------|--------|--------|----------------------|------------|-------|-------|-------|----------------------|
| | 2018 | 2019 | 2020 | 2021 | | 2018 | 2019 | 2020 | 2021 | | 2018 | 2019 | 2020 | 2021 | |
| BE | 968 | 960 | 954 | 932 | -2.2% | 532 | 536 | 544 | 536 | -1.5% | 435 | 425 | 409 | 396 | -3.2% |
| BG | | | | | | | | | | | | | | | |
| CZ | | | | | | | | | | | | | | | |
| DK | 667 | 654 | 653 | 647 | -0.9% | 575 | 567 | 567 | 565 | -0.4% | 91 | 87 | 86 | 82 | -4.7% |
| DE | 4 830 | 4 720 | 4 609 | 4 517 | -2.0% | 4 167 | 4 067 | 3 969 | 3 892 | -2.0% | 663 | 653 | 640 | 626 | -2.3% |
| EE | | | | | | | | | | | | | | | |
| IE | 2 529 | 2 505 | 2 551 | 2 545 | -0.2% | 1 481 | 1 505 | 1 568 | 1 605 | +2.4% | 1 048 | 1 000 | 983 | 940 | -4.4% |
| EL | | | | | | | | | | | | | | | |
| ES | 2 865 | 2 854 | 2 927 | 2 954 | +0.9% | 825 | 815 | 810 | 819 | +1.1% | 2 040 | 2 039 | 2 117 | 2 135 | +0.9% |
| FR | 7 652 | 7 546 | 7 442 | 7 315 | -1.7% | 3 512 | 3 471 | 3 403 | 3 331 | -2.1% | 4 141 | 4 075 | 4 039 | 3 984 | -1.4% |
| HR | | | | | | | | | | | | | | | |
| IT | 2 192 | 2 110 | 2 130 | 2 161 | +1.4% | 1 904 | 1 840 | 1 844 | 1 852 | +0.4% | 288 | 270 | 286 | 309 | +8.0% |
| CY | | | | | | | | | | | | | | | |
| LV | | | | | | | | | | | | | | | |
| LT | | | | | | | | | | | | | | | |
| LU | | | | | | | | | | | | | | | |
| HU | | | | | | | | | | | | | | | |
| MT | | | | | | | | | | | | | | | |
| NL | 1 685 | 1 641 | 1 651 | 1 628 | -1.4% | 1 622 | 1 578 | 1 593 | 1 572 | -1.3% | 63 | 63 | 58 | 56 | -4.5% |
| AT | 740 | 726 | 716 | 715 | -0.2% | 538 | 525 | 523 | 531 | +1.6% | 202 | 201 | 193 | 184 | -5.0% |
| PL | 2 429 | 2 461 | 2 468 | 2 388 | -3.2% | 2 233 | 2 221 | 2 218 | 2 113 | -4.7% | 196 | 240 | 250 | 276 | +10.4% |
| PT | 745 | 742 | 757 | 757 | +0.1% | 244 | 238 | 239 | 236 | -1.2% | 501 | 504 | 517 | 521 | +0.7% |
| RO | 1 197 | 1 179 | 1 160 | 1 148 | -1.0% | 1 184 | 1 162 | 1 145 | 1 133 | -1.0% | 12 | 17 | 15 | 15 | idem |
| SI | | | | | | | | | | | | | | | |
| SK | | | | | | | | | | | | | | | |
| FI | | | | | | | | | | | | | | | |
| SE | 534 | 516 | 510 | 511 | +0.2% | 319 | 306 | 303 | 300 | -1.1% | 214 | 210 | 207 | 211 | +2.1% |
| EU | 29 034 | 28 612 | 28 528 | 28 219 | -1.1% | 19 137 | 18 831 | 18 727 | 18 485 | -1.3% | 9 896 | 9 782 | 9 801 | 9 735 | -0.7% |
| UK | 3 441 | 3 398 | 3 359 | | | 1 883 | 1 871 | 1 850 | | | 1 558 | 1 527 | 1 509 | | |

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2020 AND 2021

18 October 2021

LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION COWS

| Dec 1000 Hd | TOTAL COWS | | | | | %Var 2020 2019 | DAIRY COWS | | | | | %Var 2020 2019 | OTHER COWS | | | | | %Var 2020 2019 |
|----------------|------------|--------|--------|--------|--------|----------------------|------------|--------|--------|--------|--------|----------------------|------------|--------|--------|--------|---------|----------------------|
| | 2017 | 2018 | 2019 | 2020 | | | 2017 | 2018 | 2019 | 2020 | | | 2017 | 2018 | 2019 | 2020 | | |
| BE | 938 | 942 | 939 | 921 | -1.9% | | 519 | 529 | 538 | 538 | -0.0% | | 419 | 412 | 401 | 383 | -4.4% | |
| BG | 357 | 351 | 343 | 382 | +11.3% | | 261 | 244 | 227 | 242 | +6.7% | | 97 | 107 | 116 | 140 | +20.2% | |
| CZ | 571 | 570 | 570 | 560 | -1.8% | | 365 | 359 | 361 | 357 | -1.2% | | 206 | 212 | 209 | 203 | -2.9% | |
| DK | 664 | 655 | 645 | 646 | +0.2% | | 575 | 570 | 563 | 565 | +0.4% | | 89 | 85 | 83 | 80 | -3.6% | |
| DE | 4 859 | 4 751 | 4 651 | 4 548 | -2.2% | | 4 199 | 4 101 | 4 012 | 3 921 | -2.2% | | 660 | 650 | 640 | 626 | -2.1% | |
| EE | 115 | 116 | 116 | 116 | -0.4% | | 86 | 85 | 85 | 84 | -0.8% | | 29 | 30 | 31 | 32 | +0.6% | |
| IE | 2 362 | 2 351 | 2 383 | 2 379 | -0.2% | | 1 343 | 1 369 | 1 426 | 1 456 | +2.1% | | 1 018 | 982 | 957 | 923 | -3.6% | |
| EL | 262 | 269 | 242 | 258 | +6.6% | | 97 | 95 | 86 | 86 | idem | | 165 | 174 | 156 | 171 | +9.6% | |
| ES | 2 822 | 2 819 | 2 881 | 2 909 | +1.0% | | 823 | 817 | 813 | 811 | -0.3% | | 1 998 | 2 002 | 2 068 | 2 099 | +1.5% | |
| FR | 7 751 | 7 650 | 7 505 | 7 475 | -0.4% | | 3 597 | 3 554 | 3 491 | 3 455 | -1.0% | | 4 154 | 4 095 | 4 014 | 4 020 | +0.1% | |
| HR | 161 | 146 | 142 | 144 | +1.4% | | 139 | 136 | 130 | 110 | -15.4% | | 22 | 10 | 12 | 34 | +183.3% | |
| IT | 2 338 | 2 263 | 2 237 | 2 243 | +0.3% | | 2 040 | 1 939 | 1 876 | 1 871 | -0.2% | | 298 | 324 | 362 | 372 | +2.8% | |
| CY | 30 | 32 | 35 | 37 | +4.8% | | 30 | 32 | 35 | 37 | +4.8% | | 0 | 0 | 0 | 0 | idem | |
| LV | 199 | 196 | 195 | 196 | +0.6% | | 150 | 144 | 138 | 136 | -1.7% | | 49 | 52 | 56 | 60 | +6.5% | |
| LT | 323 | 312 | 299 | 295 | -1.4% | | 273 | 256 | 241 | 233 | -3.3% | | 50 | 56 | 58 | 62 | +6.4% | |
| LU | 78 | 78 | 79 | 78 | -1.2% | | 52 | 53 | 54 | 54 | +0.1% | | 26 | 25 | 25 | 24 | -4.1% | |
| HU | 395 | 403 | 412 | 414 | +0.5% | | 244 | 239 | 243 | 226 | -7.0% | | 151 | 164 | 169 | 188 | +11.2% | |
| MT | 6 | 6 | 6 | 6 | +1.1% | | 6 | 6 | 6 | 6 | -1.0% | | 0 | 0 | 0 | 0 | +100.0% | |
| NL | 1 723 | 1 594 | 1 633 | 1 612 | -1.3% | | 1 665 | 1 552 | 1 590 | 1 569 | -1.3% | | 58 | 42 | 43 | 43 | idem | |
| AT | 750 | 733 | 720 | 715 | -0.6% | | 543 | 533 | 524 | 525 | +0.1% | | 207 | 200 | 195 | 191 | -2.5% | |
| PL | 2 341 | 2 417 | 2 406 | 2 391 | -0.6% | | 2 153 | 2 214 | 2 167 | 2 126 | -1.9% | | 188 | 203 | 239 | 266 | +10.9% | |
| PT | 728 | 723 | 731 | 739 | +1.1% | | 239 | 235 | 234 | 233 | -0.6% | | 490 | 487 | 497 | 507 | +1.9% | |
| RO | 1 187 | 1 173 | 1 166 | 1 165 | -0.1% | | 1 175 | 1 158 | 1 139 | 1 140 | +0.1% | | 12 | 15 | 27 | 25 | -7.8% | |
| SI | 169 | 166 | 166 | 167 | +0.6% | | 109 | 103 | 101 | 99 | -1.6% | | 60 | 64 | 65 | 68 | +4.1% | |
| SK | 195 | 195 | 192 | 192 | -0.2% | | 130 | 128 | 126 | 122 | -3.0% | | 65 | 67 | 66 | 69 | +5.3% | |
| FI | 329 | 322 | 318 | 316 | -0.6% | | 271 | 264 | 259 | 256 | -1.3% | | 58 | 58 | 59 | 61 | +2.3% | |
| SE | 522 | 514 | 500 | 499 | -0.2% | | 323 | 313 | 301 | 304 | +1.0% | | 199 | 201 | 198 | 194 | -2.1% | |
| EU | 32 176 | 31 749 | 31 513 | 31 402 | -0.4% | | 21 409 | 21 029 | 20 766 | 20 562 | -1.0% | | 10 767 | 10 719 | 10 748 | 10 838 | +0.8% | |
| UK | 3 443 | 3 382 | 3 337 | | | | 1 904 | 1 879 | 1 867 | | | | 1 540 | 1 503 | 1 470 | | | |

Source : EStat Newcronos

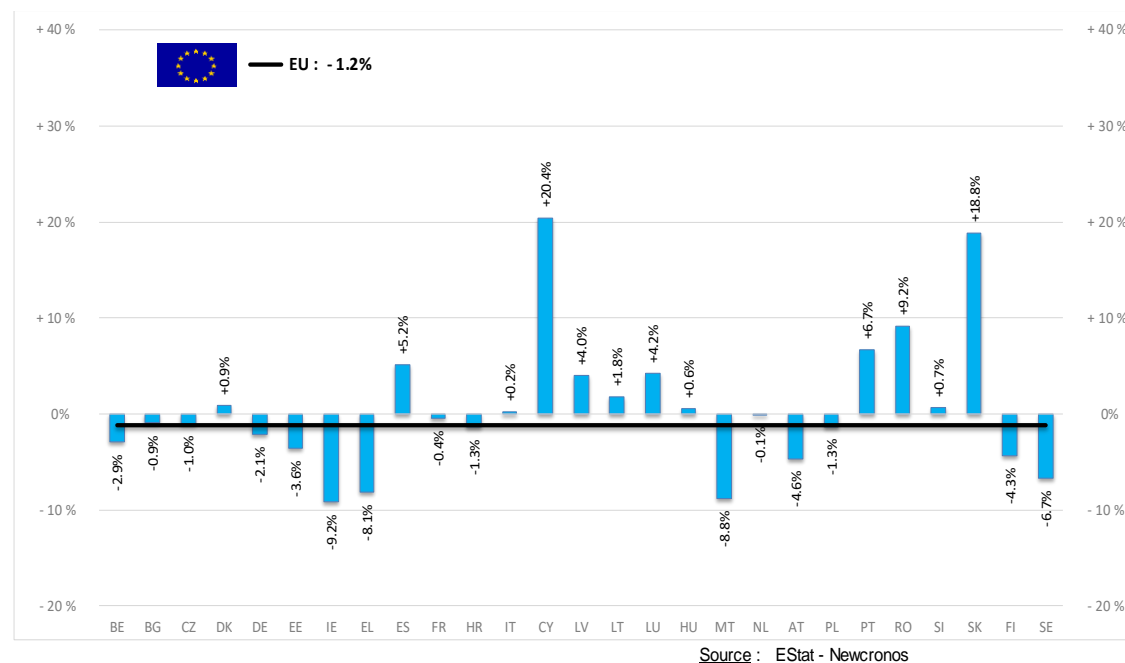
EU %Var is calculated considering only countries available in 2019 AND 2020

PRODUCTION

% EVOLUTION TONNES

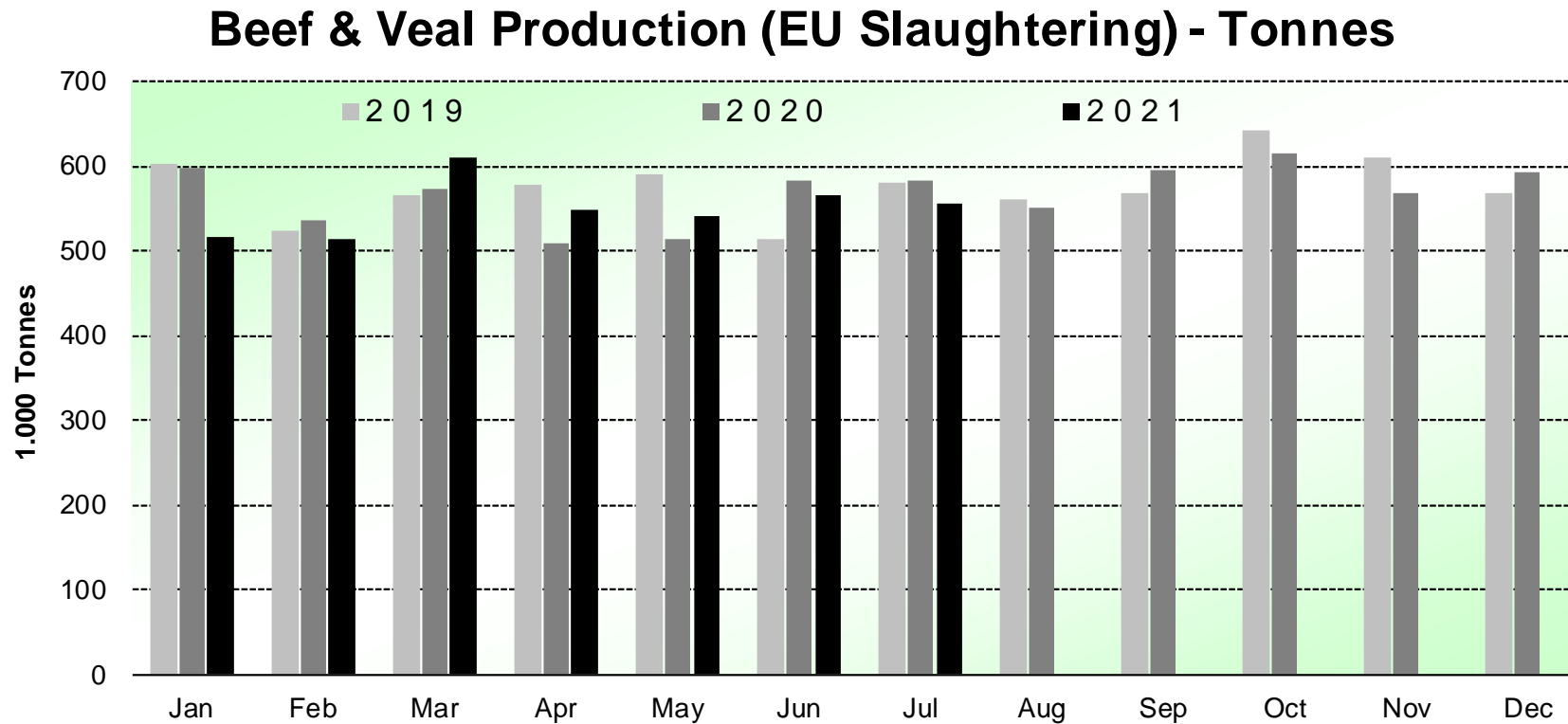
| TONNES | Jan-Jul 21/20 |
|------------------------|---------------|
| | EU |
| Bull | -1.1% |
| Bullock | -5.3% |
| Cow | -0.5% |
| Heifer | -1.1% |
| Calve | -0.7% |
| Young cattle | -2.3% |
| Meat of bovine animals | -1.2% |

Estimates for last month of period :



PRODUCTION

HISTORIC
TONNES



Source : EStat-Newcronos

PRICES CARCASSES

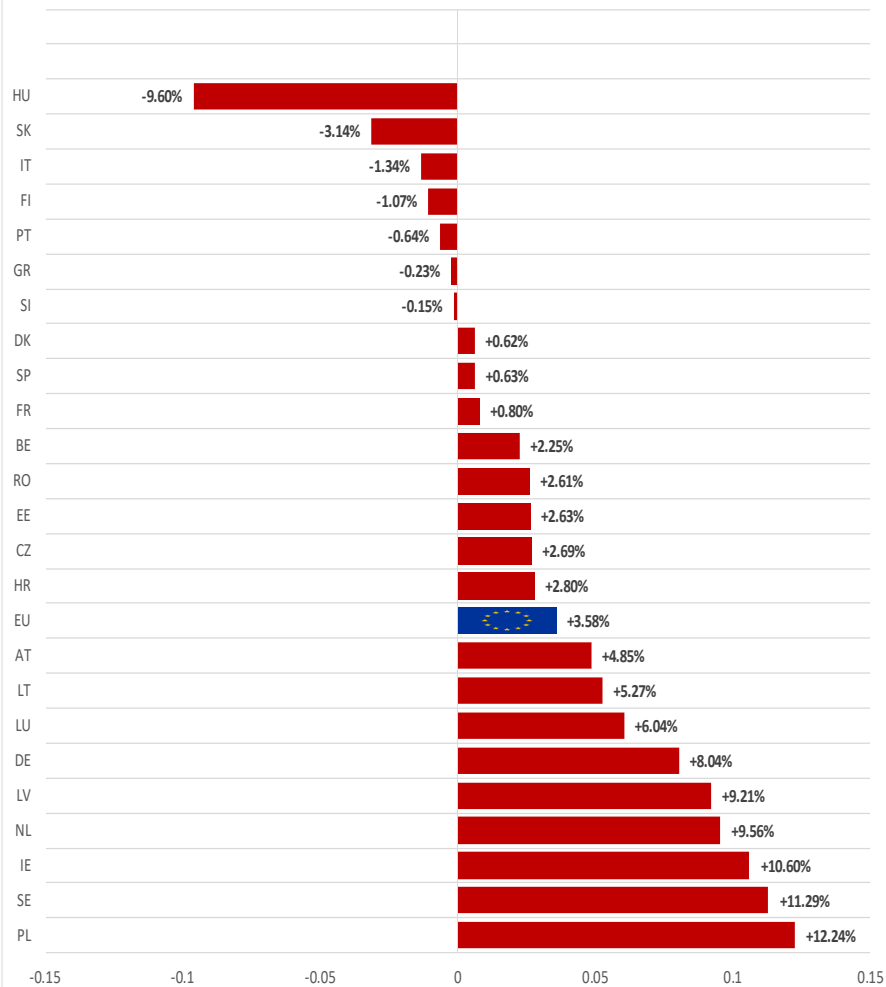
Dashboard

| EU Prices week | | 40 | Evolution since last week | Evolution since last month | Evolution since last year |
|----------------|------------------------------|-------|---------------------------|----------------------------|---------------------------|
| Carcasse | Average A/C/Z -R3 | 403.3 | + 1.2% | + 2.9% | + 14.5% |
| | Young Bovines (Z) | 395.1 | + 1.7% | + 3.3% | + 1.7% |
| | Young Bulls (A) | 402.2 | + 1.3% | + 3.3% | + 14.6% |
| | Steers (C) | 417.7 | + 0.7% | + 0.9% | + 14.7% |
| | Cows (D) | 335.6 | + 0.3% | + 1.4% | + 22.6% |
| | Heifers (E) | 416.5 | + 0.6% | + 3.0% | + 13.2% |
| Live Animals | Male Calves Dairy Type | 82.92 | - 6.3% | - 17.7% | + 17.1% |
| | Male Calves Beef Type | 215.6 | - 1.3% | - 2.9% | + 15.6% |
| | Young Store Cattle | 2.71 | - 0.3% | + 0.1% | + 5.5% |
| | Yearling Male Store Cattle | 3.32 | - 2.9% | + 1.1% | + 47.3% |
| | Yearling Female Store Cattle | 2.56 | - 0.7% | - 1.7% | + 7.7% |
| | Calves slaughtered <8M | 536.4 | + 0.2% | + 2.0% | + 15.1% |

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

PRICES CARCASSES

EU ACZ R3 Price Comparison between average monthly price October 2020 - September 2021 compared to October 2019 - September 2020

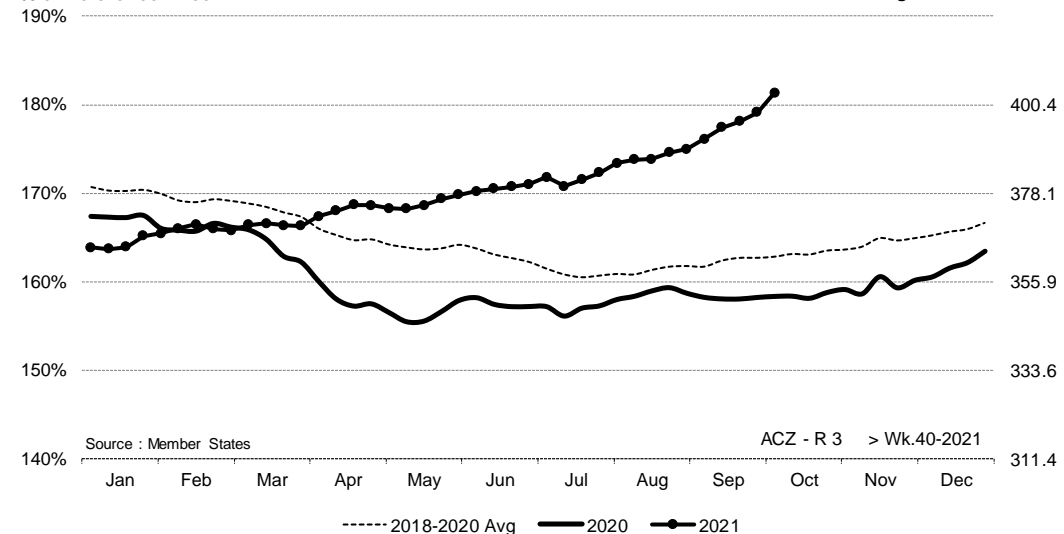


EU EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.40-2021

% of Reference Price

€/100 kg cwe



Price in week 40 : **403.30**

Average price in September 2021 : **393.87**

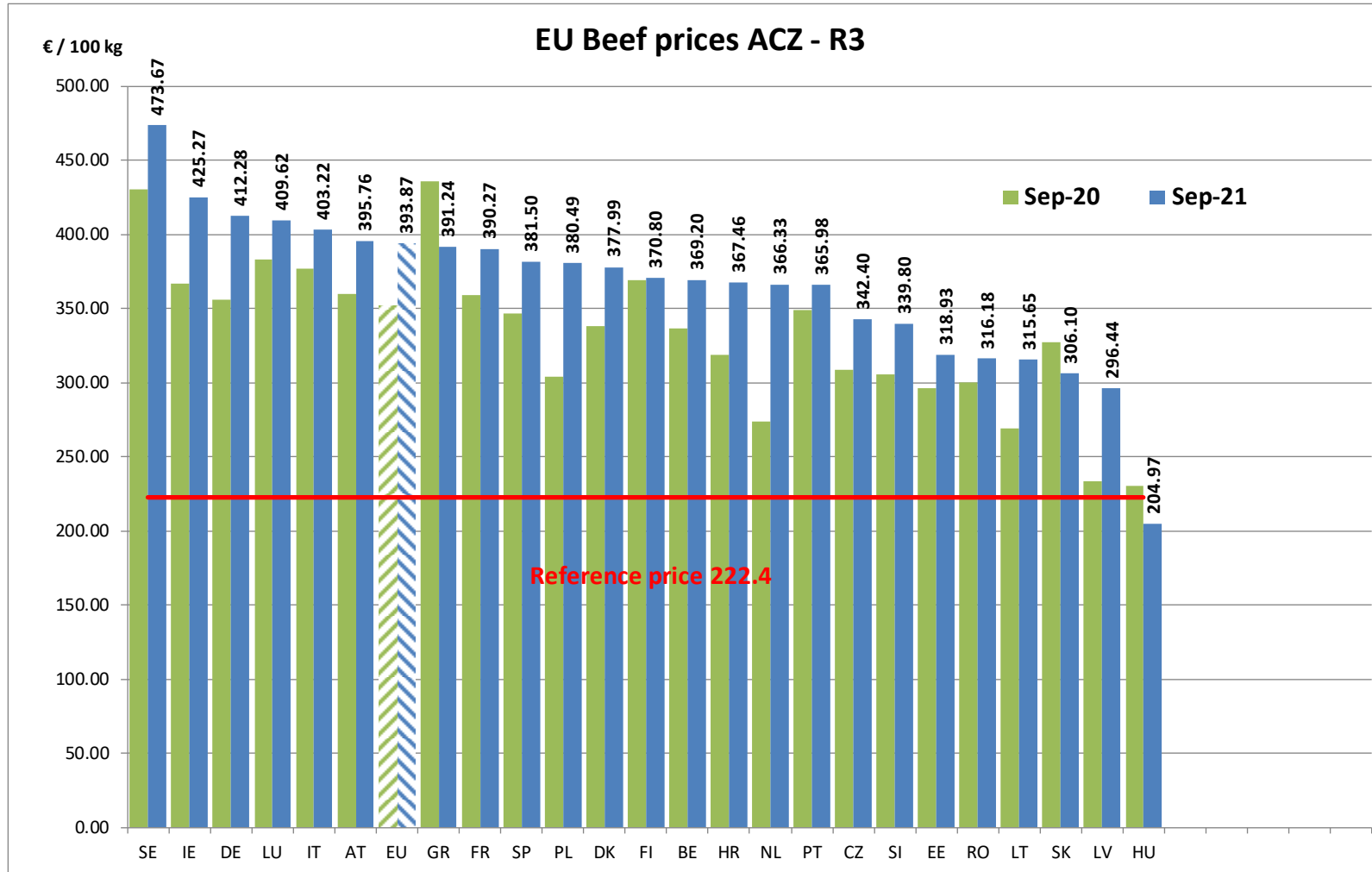
% change y/y : **+ 14.52%**

% change y/y : **+ 11.98%**

% Ref. Price in wk 40 : **181.3%**

PRICES CARCASSES

EU EVOLUTION
A/C/Z.R3

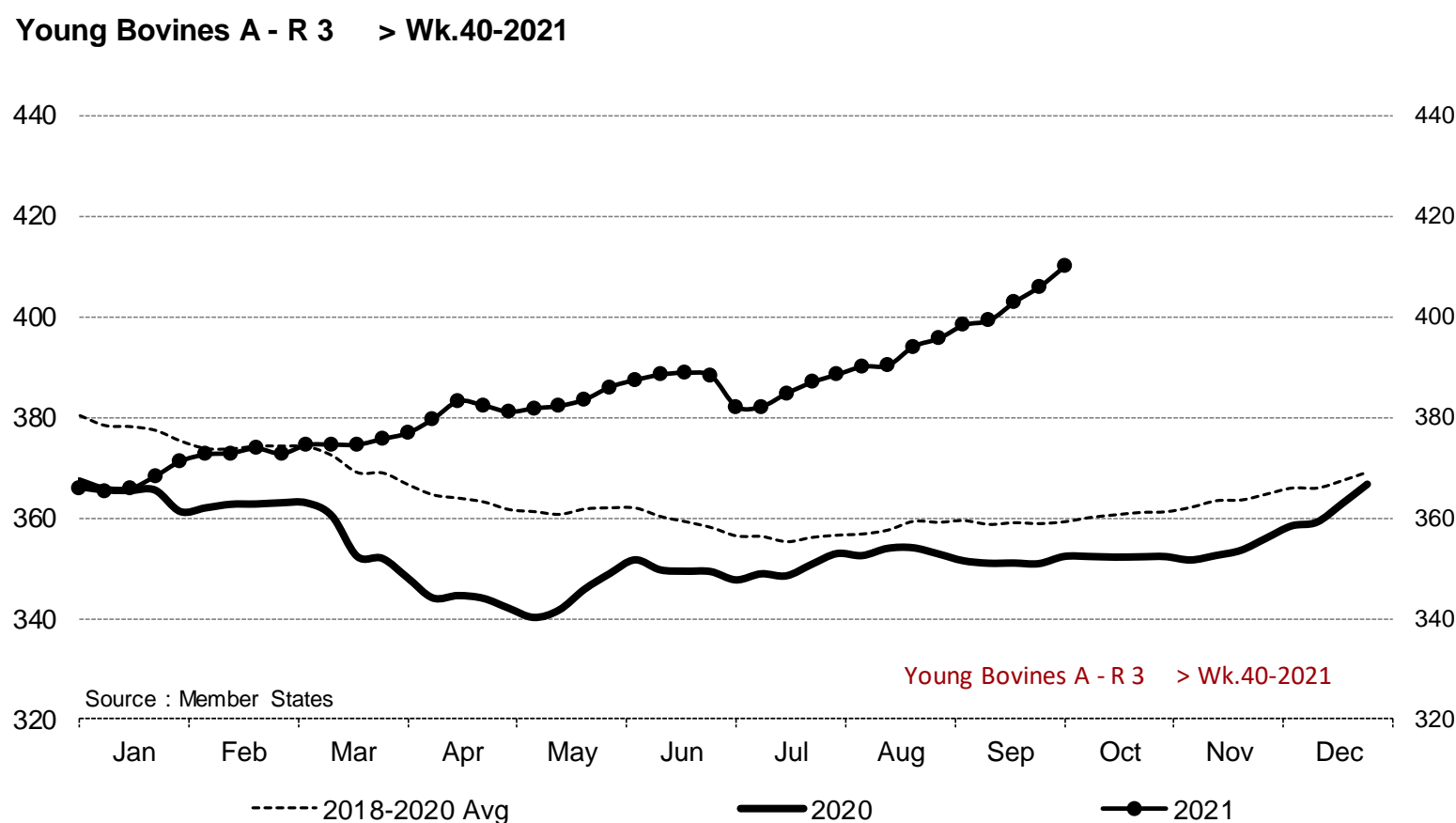


18 October 2021

PRICES CARCASSES

EU EVOLUTION YOUNG BULL – A.R3

Young Bovines A - R 3 > Wk.40-2021

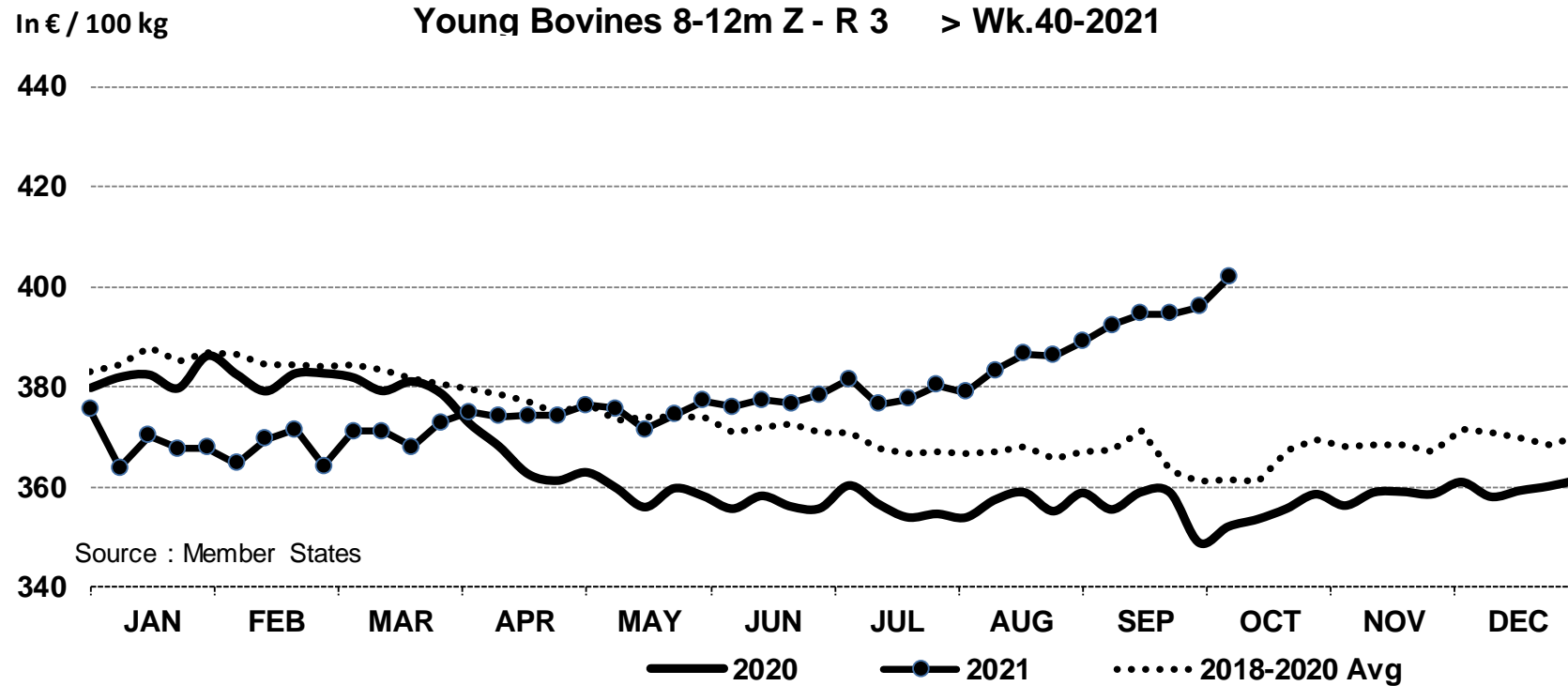


Price in week 40 : **409.95**
% change y/y : **+ 16.4%**

Average price in September 2021 : **400.10**
% change y/y : **+ 13.9%**

PRICES CARCASSES

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



Price in week 40 : **401.88**
% change y/y : **+ 14.2%**

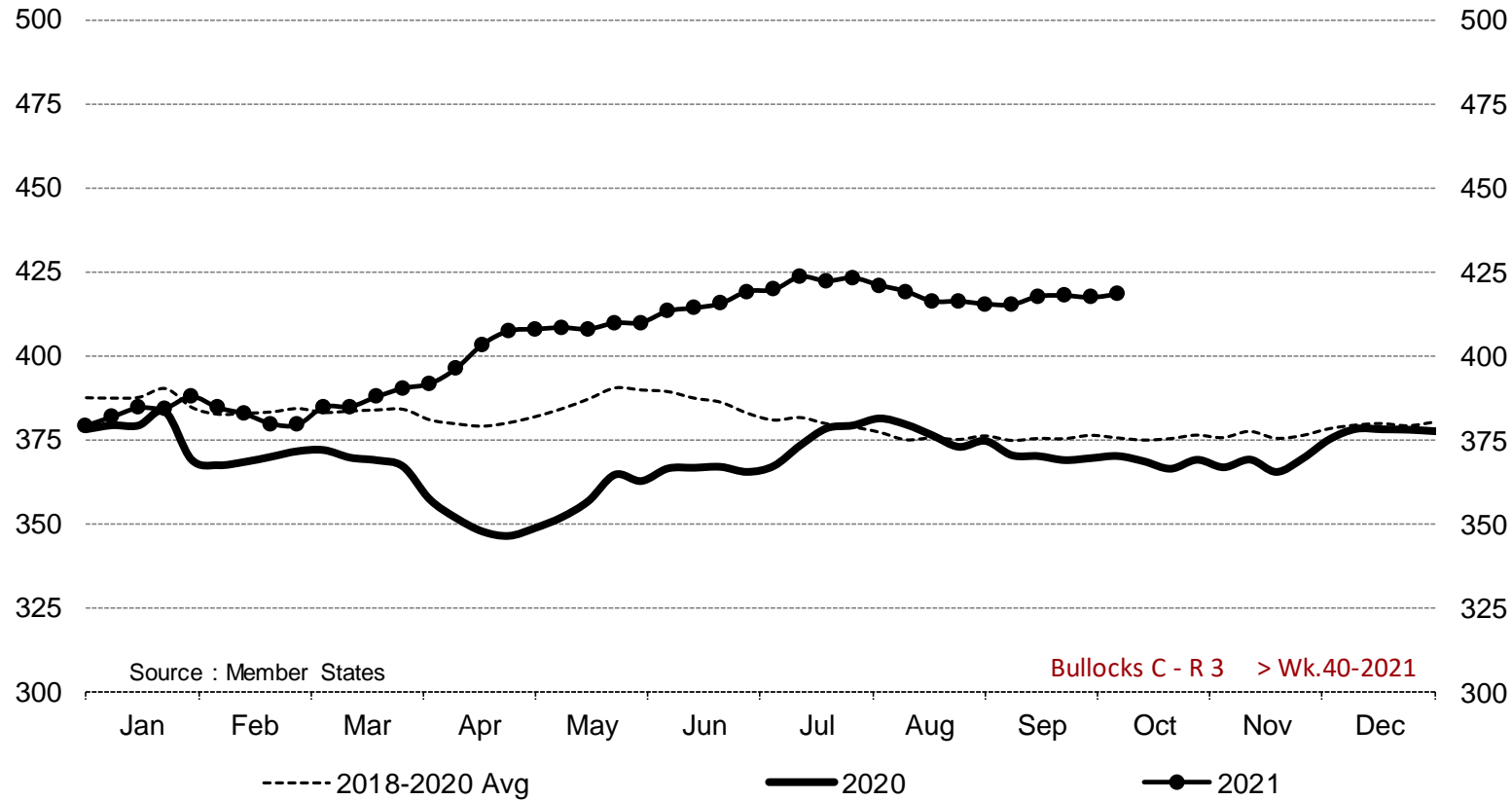
09/09/2021

Average price in September 2021 : **393.31**
% change y/y : **+ 10.7%**

PRICES CARCASSES

E.U. EVOLUTION STEER – C.R3

Bullocks C - R 3 > Wk.40-2021



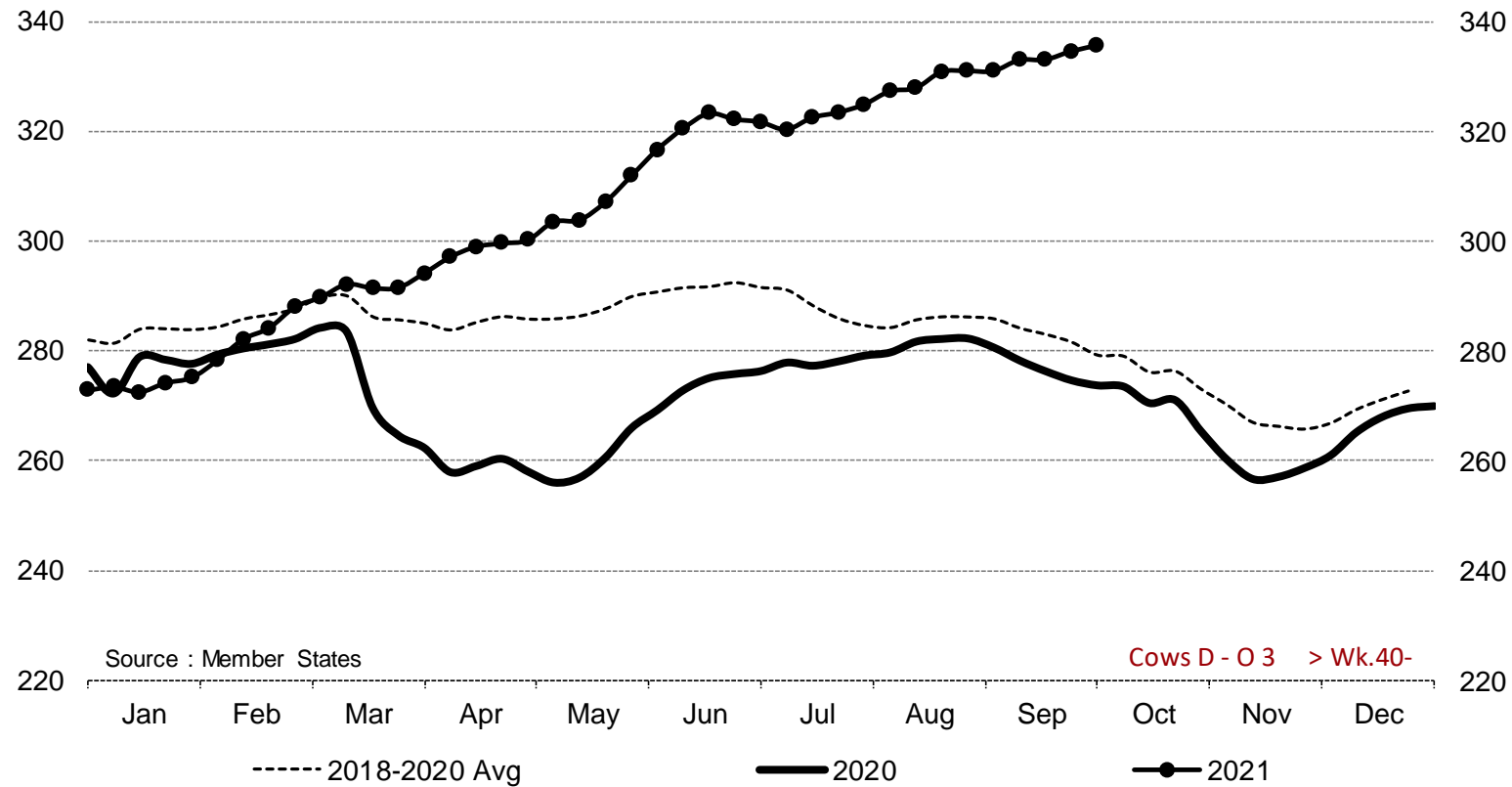
Price in week 40 : **418.24**
% change y/y : **+ 13.0%**

Average price in September 2021 : **416.61**
% change y/y : **+ 12.7%**

PRICES CARCASSES

E.U. EVOLUTION
COW – D.O3

Cows D - O 3 > Wk.40-2021



Price in week 40 : **335.61**
% change y/y : **+ 22.6%**

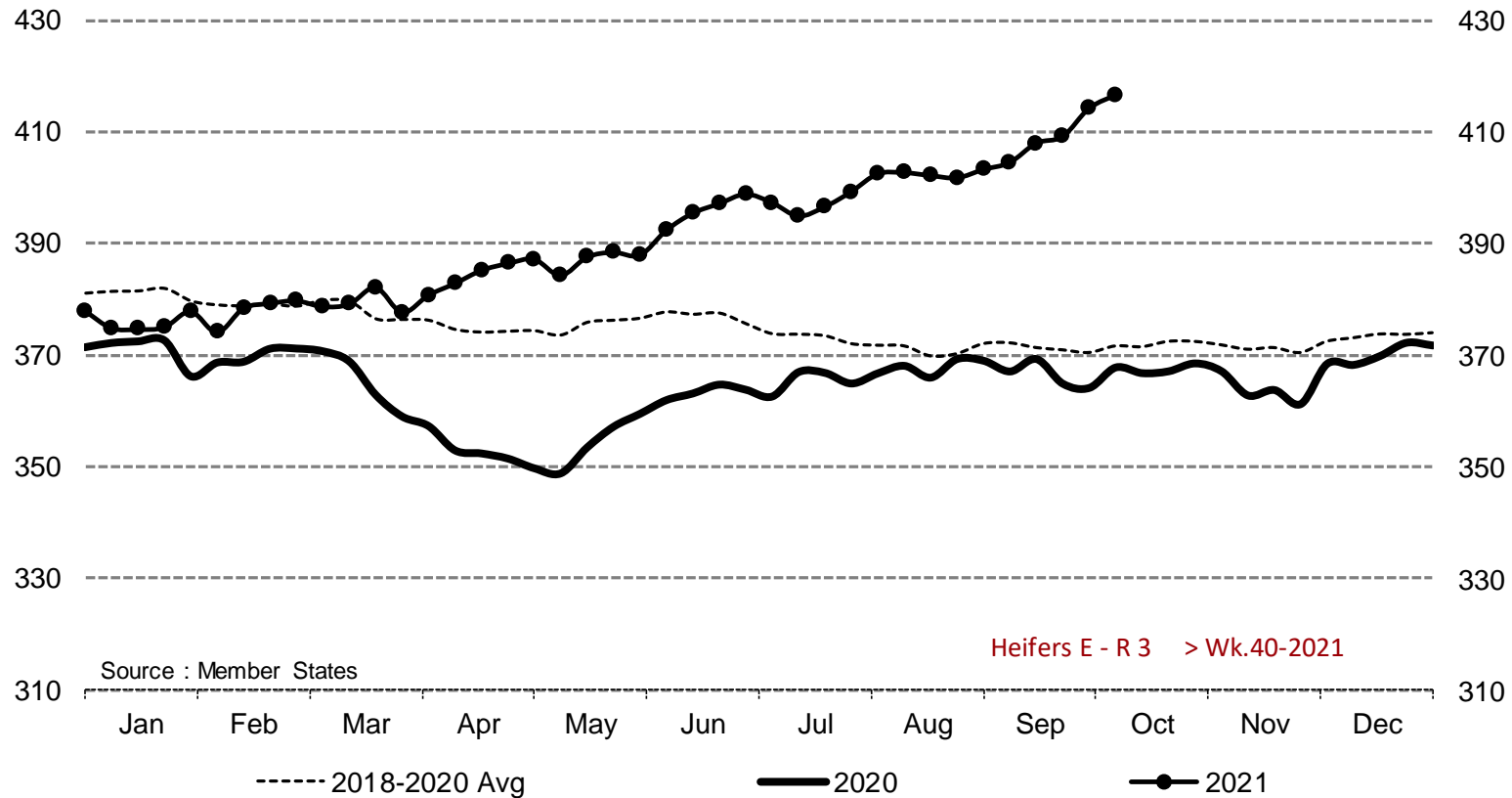
Average price in September 2021 : **332.40**
% change y/y : **+ 20.0%**

18 October 2021

PRICES CARCASSES

EU EVOLUTION HEIFER – E.R3

Heifers E - R 3 > Wk.40-2021

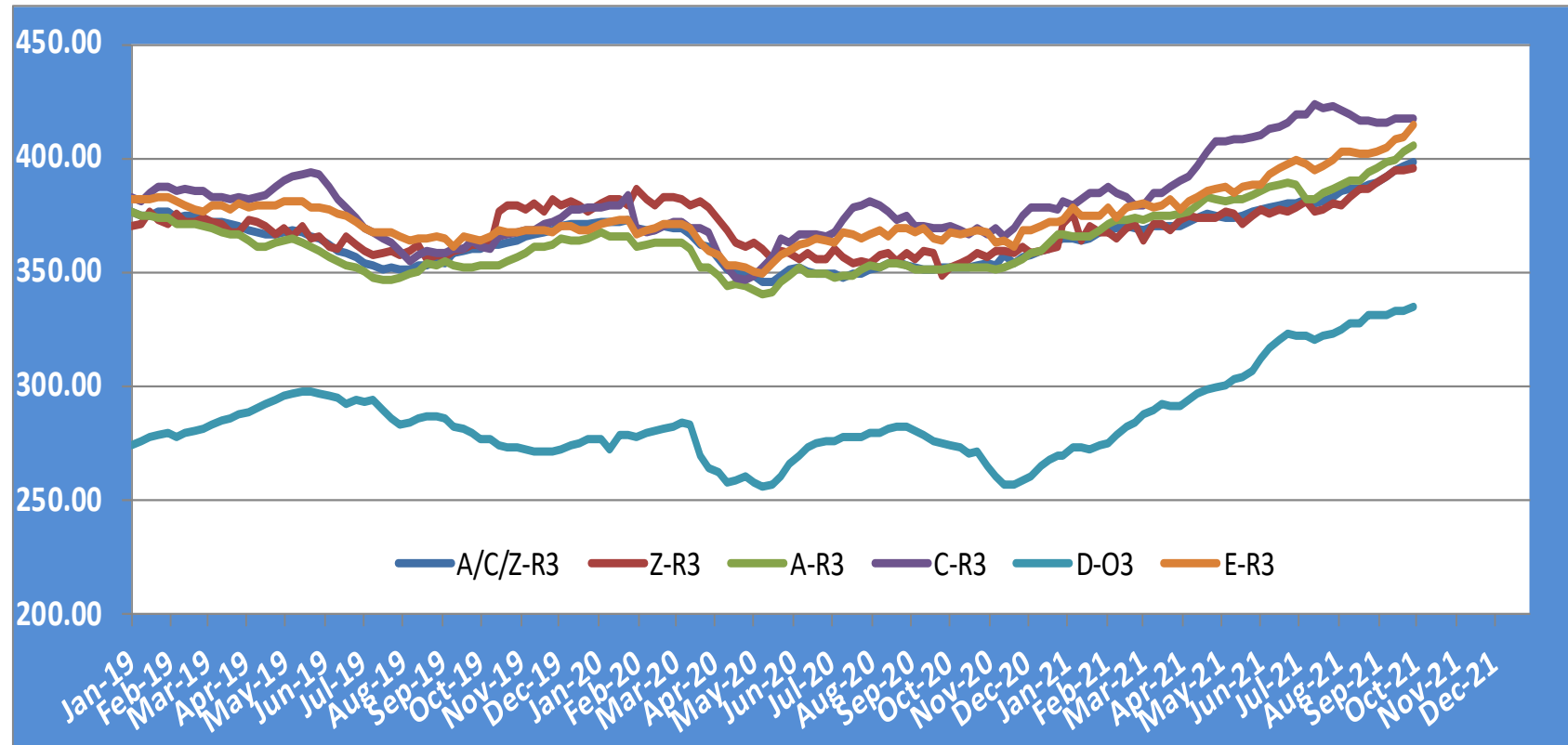


Price in week 40 : **416.56**
% change y/y : **+ 13.2%**

Average price in September 2021 : **407.51**
% change y/y : **+ 11.2%**

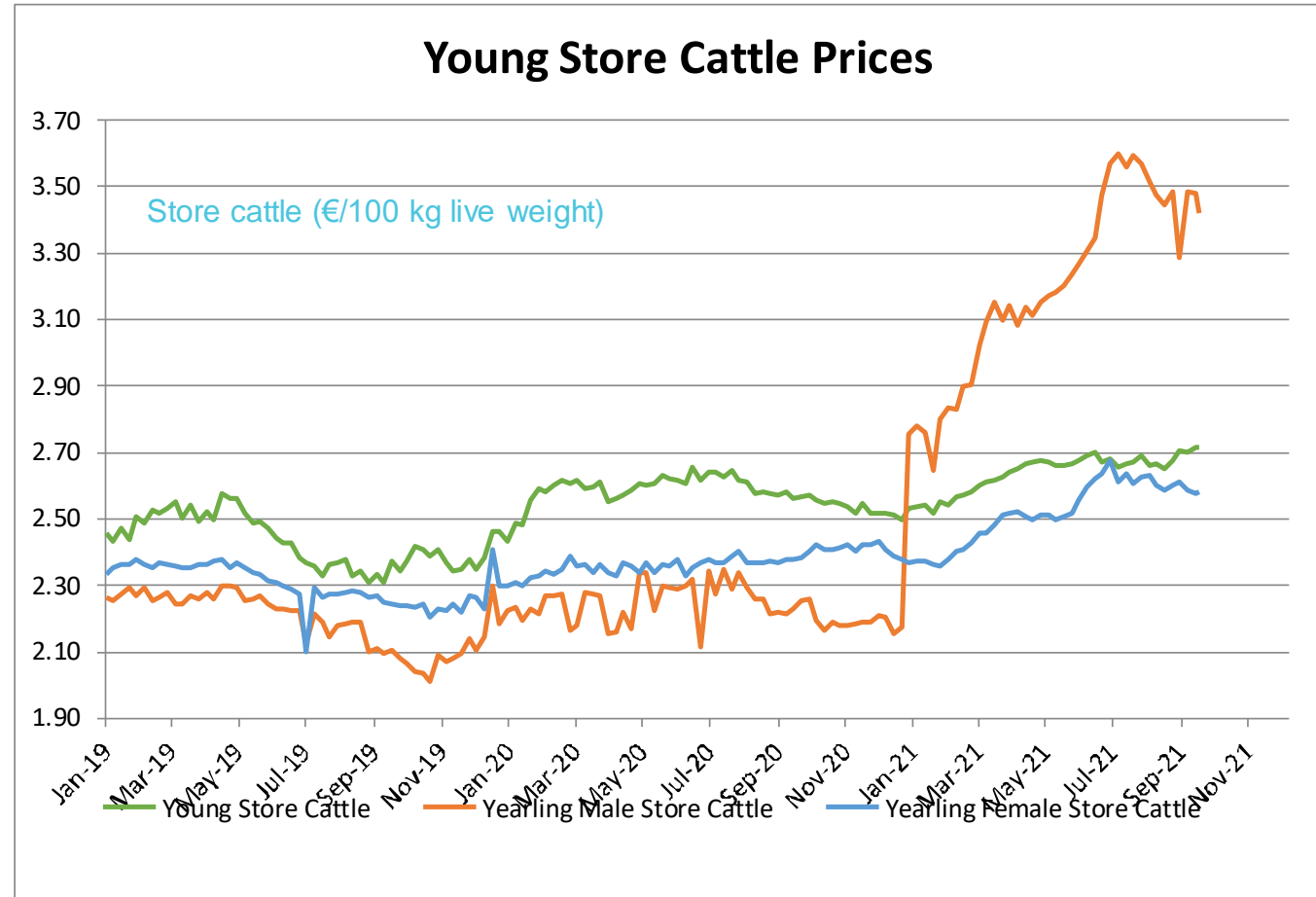
PRICES CARCASSES

EU EVOLUTION All CAT GLOBAL VIEW



PRICES LIVE BOVINES

EU EVOLUTION STORE CATTLE



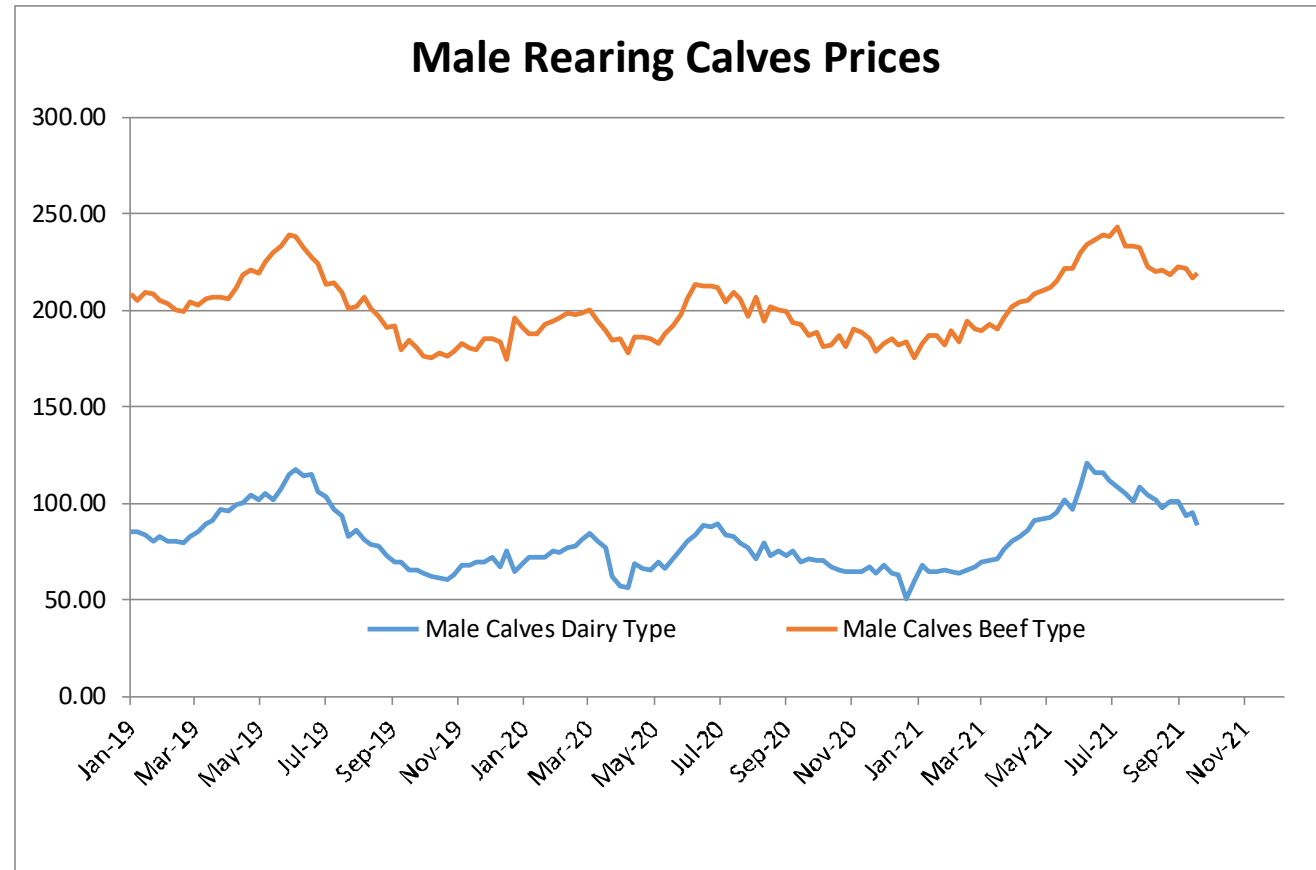
| | | | | |
|------------------------------------|------------|--------|----------------------------------|---------|
| Young Store Cattle Price in | Week 39 | 2.71 | Yearling Male Store Cattle Price | 3.42 |
| | Change y/y | +6.16% | Change y/y | +53.64% |
| Yearling Female Store Cattle Price | | 2.58 | | |
| | Change y/y | +8.71% | | |

18 October 2021

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 39 **218.60**
Change y/y +13.42%

Male Rearing Calves Dairy type

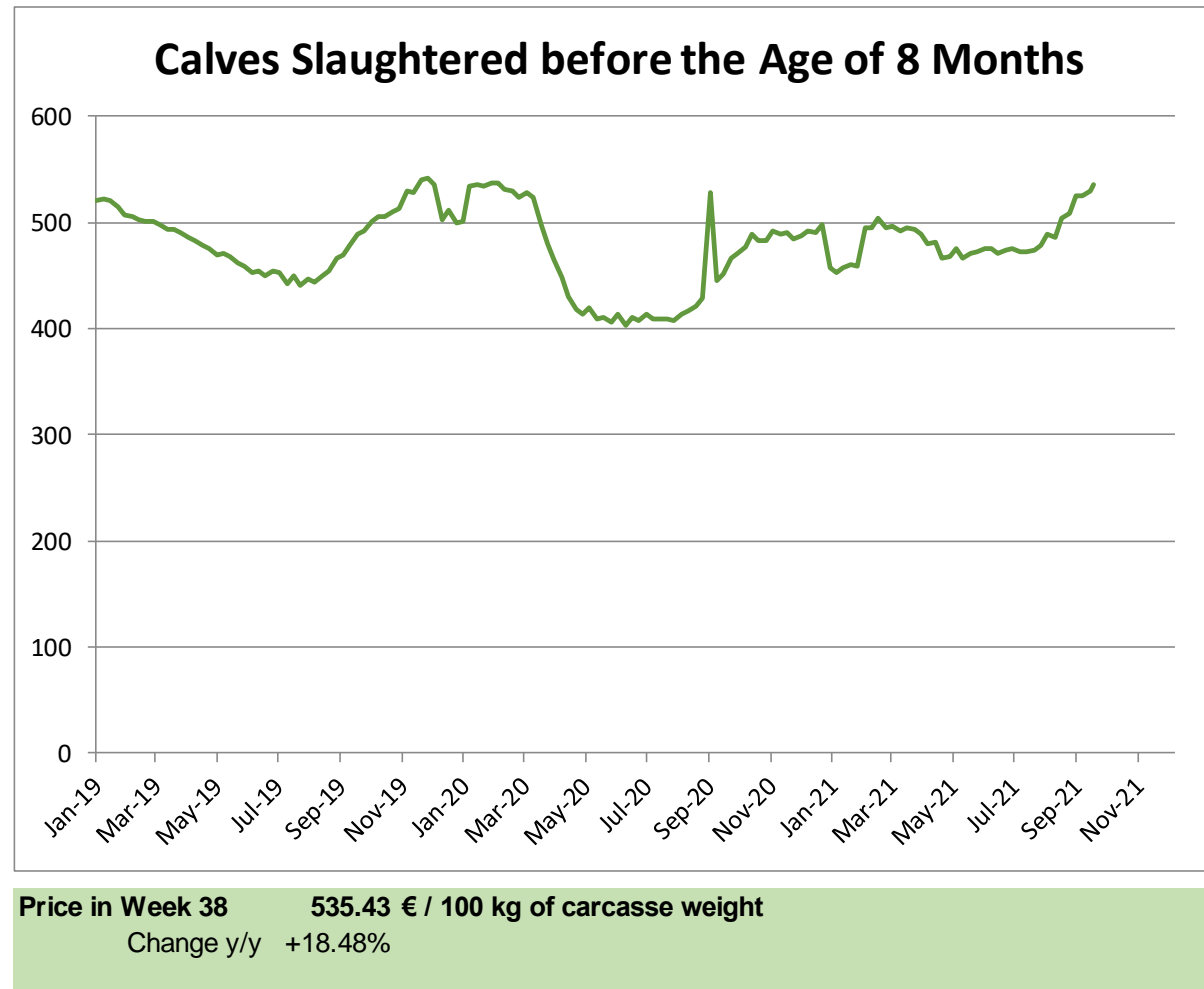
Price in Week 39 **88.46**
Change y/y +26.93%

18 October 2021

PRICES LIVE BOVINES

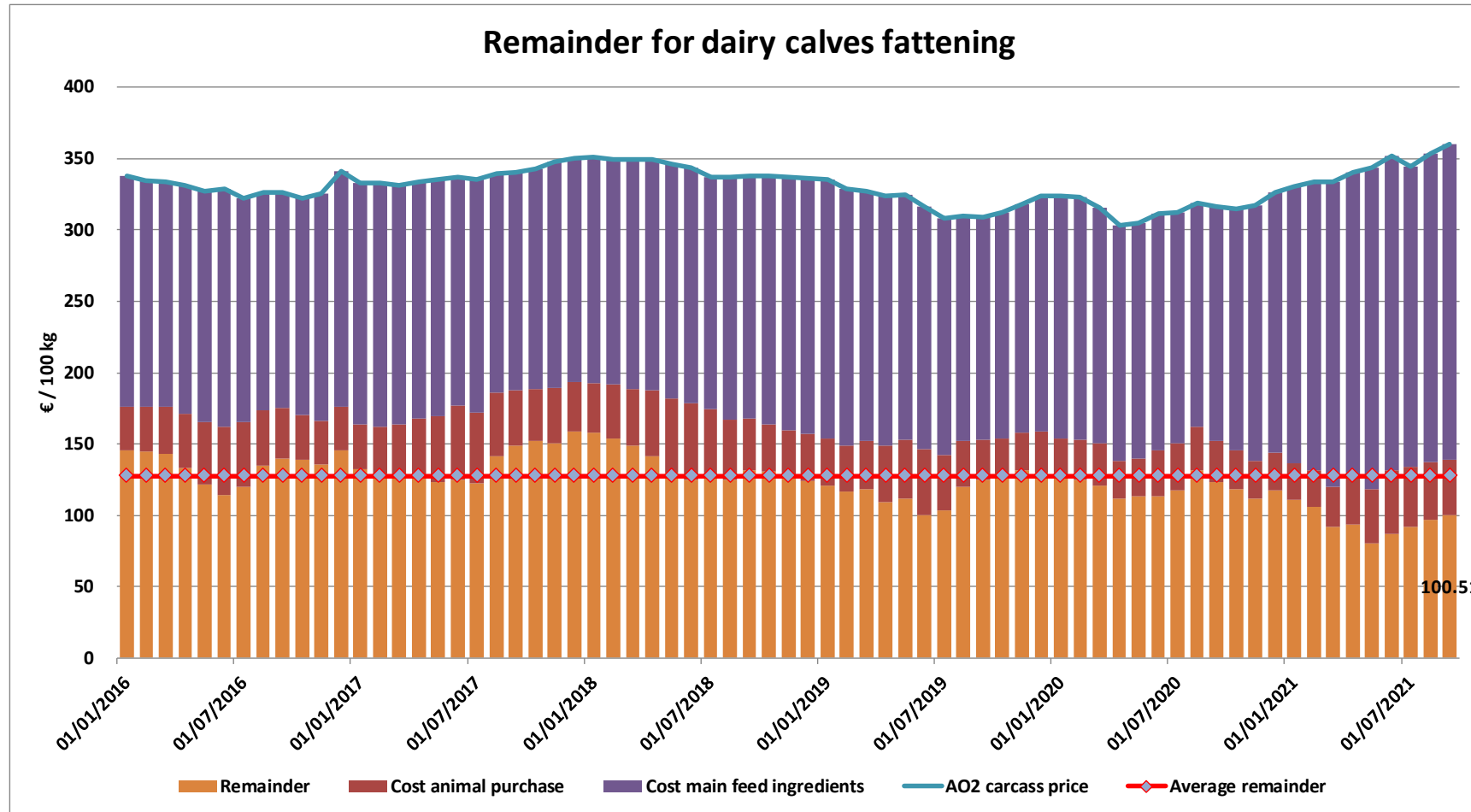
EU EVOLUTION Butcher Calves

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

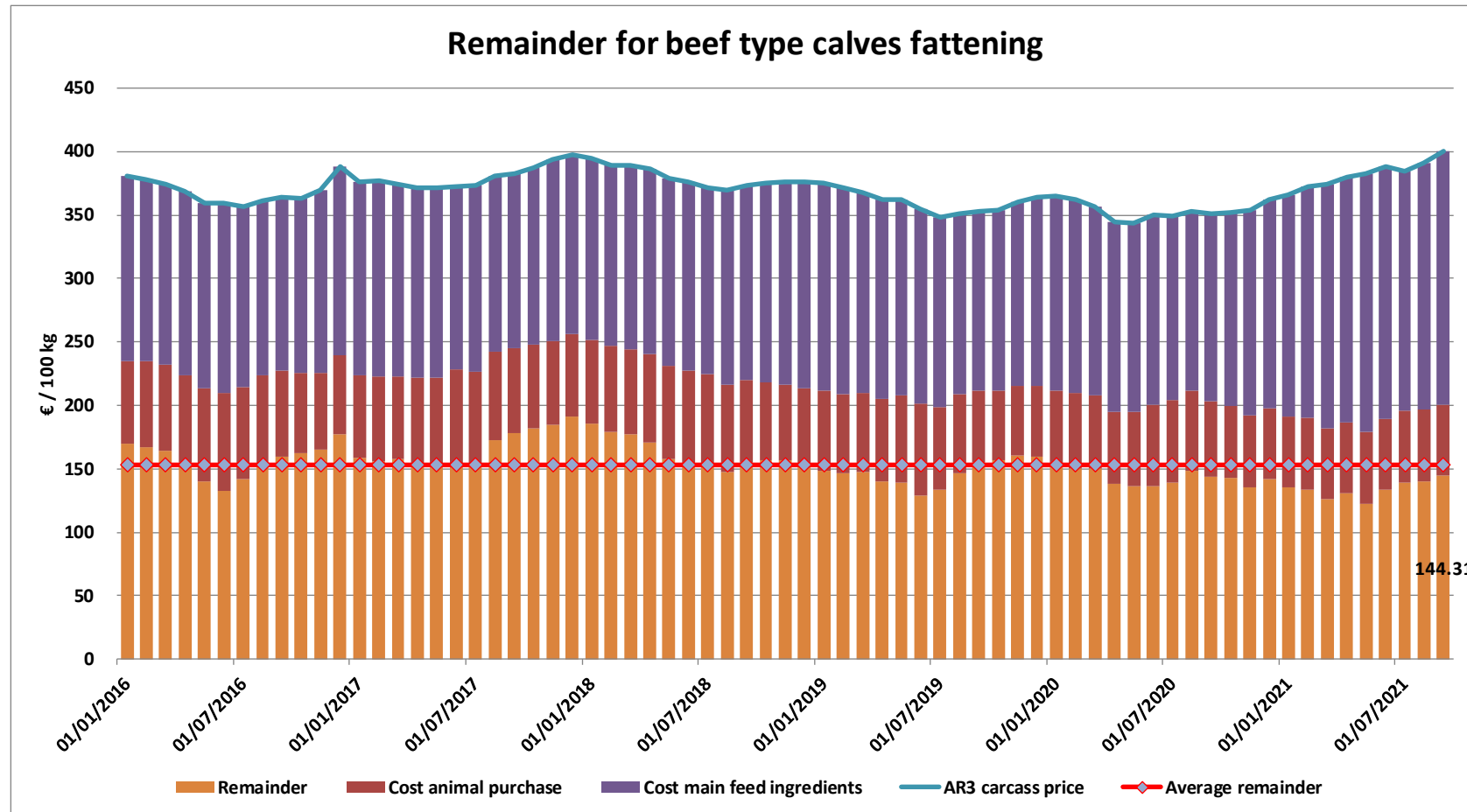


18 October 2021

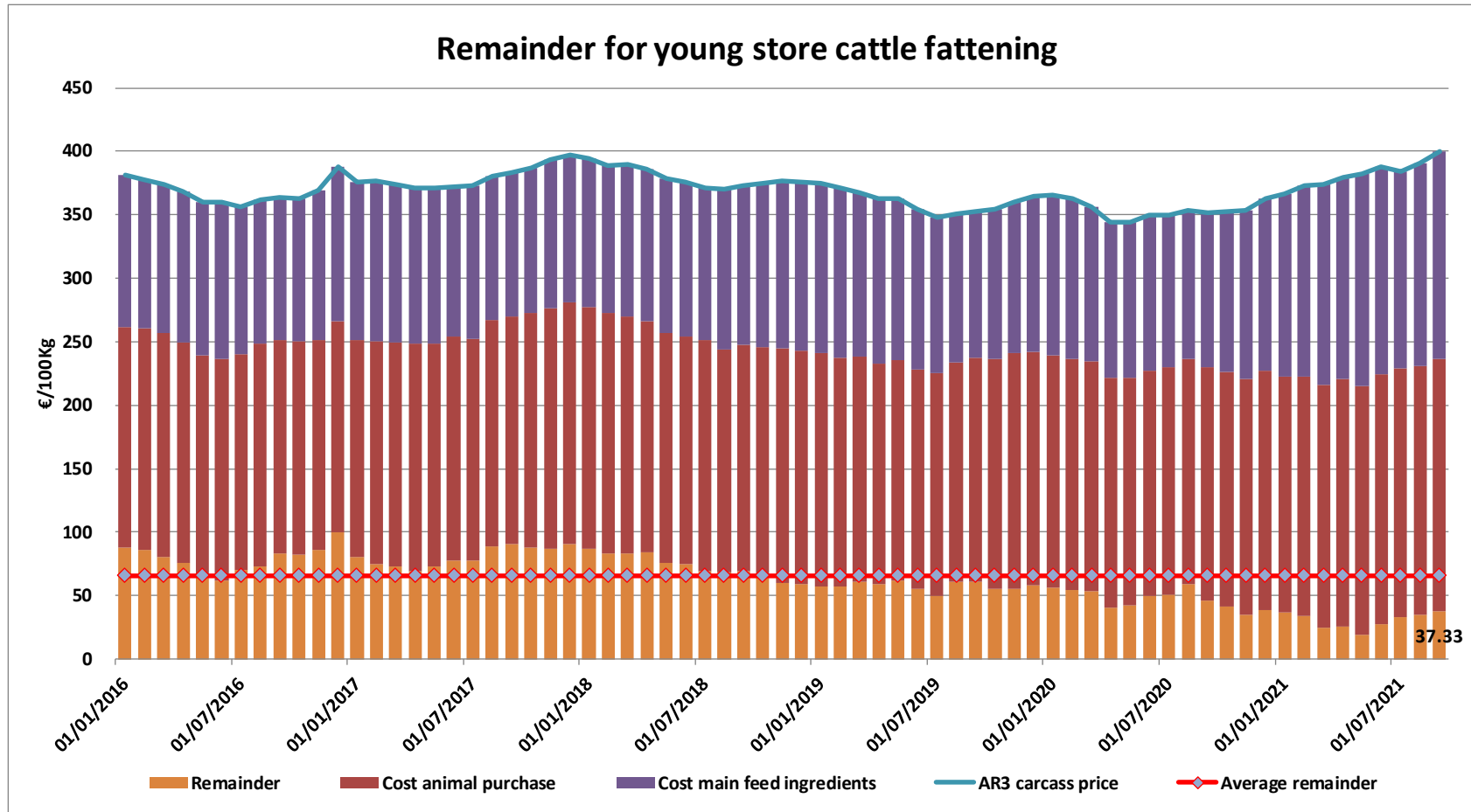
REMAINDERS



REMAINDERS



REMAINDERS



Forecast Summary

| | 2019 | 2020 | 2021 | 2022 |
|-----------------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| EU PRODUCTION (1000T) | - 1.46% 6 908 | - 1.53% 6 822 | - 1.12% 6 783 | - 1.44% 6 690 |
| CONSUMPTION (1000T) | + 1.22% 6 650 | - 1.72% 6 543 | - 1.01% 6 496 | - 0.11% 6 497 |
| BALANCE | 258 | 279 | 286 | 193 |

Provisional Results of Beef Forecast Working Group - October 2021

A. Production Figures before 2021 provided by Eurostat, All Other Figures provided by MS

NET BEEF and VEAL PRODUCTION in EU

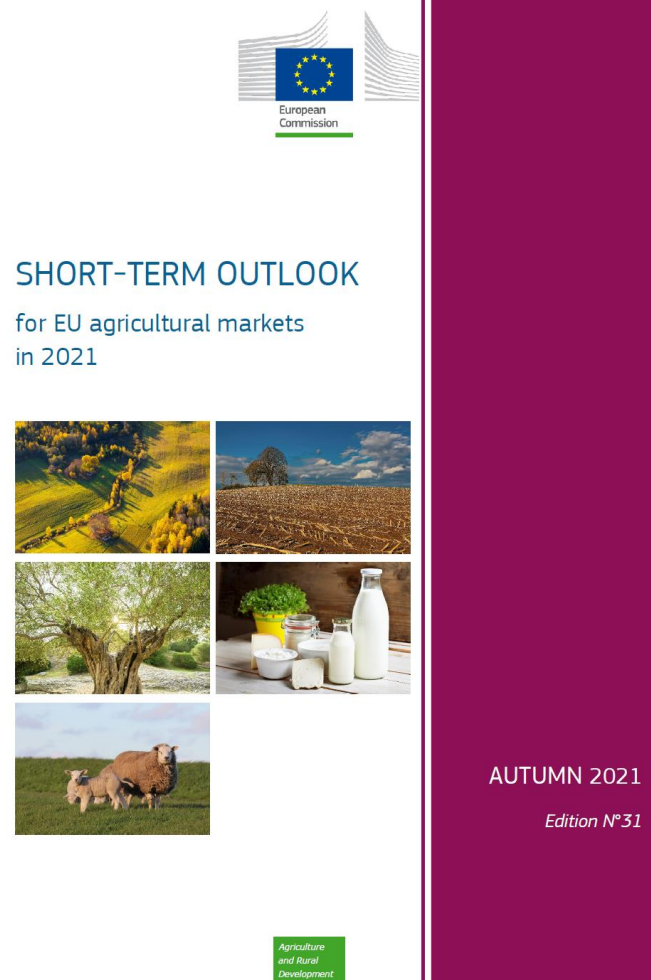
| (1000 T) | BE | BG | CZ | DK | DE | EE | GR | ES | FR | IE | HR | IT | CY | LV | LT | LU | HU | MT | NL | AT | PL | PT | RO | SI | SK | FI | SE | E available |
|-------------|--------|---------|--------|--------|--------|--------|---------|--------|--------|--------|--------|--------|---------|--------|--------|--------|--------|---------|--------|--------|---------|--------|---------|--------|----------|--------|--------|----------------|
| 2017 | 281.5 | 7.4 | 67.7 | 124.0 | 1124.0 | 9.0 | 44.1 | 643.9 | 1442.2 | 617.0 | 42.2 | 756.4 | 8.3 | 16.8 | 40.9 | 9.5 | 27.2 | 1.1 | 438.9 | 226.1 | 558.6 | 91.1 | 59.1 | 35.8 | 7.8 | 85.4 | 132.1 | 6898 |
| Var | 3.2 | 0.8 | -4.2 | -5.4 | -24.0 | -0.4 | 3.9 | 6.9 | -22.0 | 28.7 | -2.2 | -53.2 | 1.3 | -0.9 | -1.4 | 0.1 | -0.9 | 0.0 | 22.8 | -1.3 | 57.1 | 0.0 | 1.6 | 0.1 | -0.5 | -1.0 | 0.8 | |
| Var % | + 1.1% | + 11.7% | - 5.9% | - 4.2% | - 2.1% | - 4.6% | + 9.8% | + 1.1% | - 1.5% | + 4.9% | - 5.0% | - 6.6% | + 18.0% | - 5.4% | - 3.3% | + 1.3% | - 3.1% | - 2.6% | + 5.5% | - 0.6% | + 11.4% | - 0.0% | + 2.8% | + 0.4% | - 6.0% | - 1.1% | + 0.6% | |
| 2018 | 277.3 | 7.2 | 71.6 | 129.2 | 1102.0 | 8.6 | 39.6 | 669.0 | 1460.0 | 622.5 | 43.8 | 809.2 | 5.3 | 15.9 | 40.3 | 9.9 | 29.2 | 1.1 | 459.2 | 233.5 | 564.7 | 93.8 | 49.9 | 34.9 | 8.1 | 86.5 | 136.9 | 7009 |
| Var | -4.2 | -0.2 | 3.9 | 5.2 | -22.0 | -0.4 | -4.5 | 25.2 | 17.8 | 5.5 | 1.6 | 52.8 | -3.0 | -0.9 | -0.6 | 0.3 | 1.9 | -0.1 | 20.3 | 7.4 | 6.1 | 2.7 | -9.2 | -0.9 | 0.3 | 1.1 | 4.8 | |
| Var % | - 1.5% | - 3.0% | + 5.7% | + 4.2% | - 2.0% | - 4.9% | - 10.2% | + 3.9% | + 1.2% | + 0.9% | + 3.7% | + 7.0% | - 36.5% | - 5.3% | - 1.5% | + 3.5% | + 7.1% | - 4.5% | + 4.6% | + 3.3% | + 1.1% | + 3.0% | - 15.6% | - 2.6% | + 4.1% | + 1.3% | + 3.6% | |
| 2019 | 263.8 | 5.5 | 72.9 | 124.6 | 1106.0 | 8.6 | 33.5 | 695.2 | 1428.5 | 619.8 | 45.4 | 779.8 | 5.6 | 14.8 | 42.5 | 10.2 | 29.7 | 1.0 | 424.3 | 229.6 | 560.5 | 92.0 | 43.5 | 35.7 | 8.3 | 87.2 | 139.7 | 6908 |
| Var | -13.6 | -1.7 | 1.3 | -4.6 | 4.0 | 0.0 | -6.2 | 26.2 | -31.5 | -2.7 | 1.7 | -29.4 | 0.3 | -1.1 | 2.2 | 0.3 | 0.6 | 0.0 | -34.9 | -3.8 | -4.3 | -1.8 | -6.4 | 0.9 | 0.2 | 0.7 | 2.8 | |
| Var % | - 4.9% | - 24.1% | + 1.8% | - 3.6% | + 0.4% | + 0.1% | - 15.6% | + 3.9% | - 2.2% | - 0.4% | + 3.8% | - 3.6% | + 6.3% | - 6.9% | + 5.4% | + 3.0% | + 2.0% | - 3.7% | - 7.6% | - 1.6% | - 0.8% | - 1.9% | - 12.8% | + 2.5% | + 2.0% | + 0.8% | + 2.0% | |
| 2020 | 254.5 | 6.2 | 72.5 | 121.2 | 1090.0 | 8.9 | 34.7 | 677.7 | 1434.6 | 633.4 | 43.4 | 732.3 | 4.6 | 14.5 | 41.7 | 10.3 | 28.1 | 1.1 | 432.8 | 218.4 | 559.4 | 97.8 | 32.2 | 36.5 | 7.9 | 86.5 | 141.0 | 6822 |
| Var | -9.2 | 0.8 | -0.4 | -3.4 | -16.0 | 0.3 | 1.3 | -17.4 | 6.1 | 13.6 | -2.1 | -47.5 | -1.0 | -0.3 | -0.7 | 0.1 | -1.7 | 0.1 | 8.5 | -11.3 | -1.1 | 5.8 | -11.4 | 0.8 | -0.3 | -0.7 | 1.3 | |
| Var % | - 3.5% | + 13.9% | - 0.5% | - 2.7% | - 1.4% | + 3.7% | + 3.8% | - 2.5% | + 0.4% | + 2.2% | - 4.5% | - 6.1% | - 17.3% | - 1.8% | - 1.7% | + 0.8% | - 5.6% | + 10.7% | + 2.0% | - 4.9% | - 0.2% | + 6.2% | - 26.1% | + 2.1% | - 4.1% | - 0.7% | + 1.0% | |
| 2021 | 245.0 | 6.7 | 71.7 | 123.3 | 1094.0 | | 43.2 | 680.0 | 1426.0 | 579.0 | 45.0 | 743.0 | | | | | 30.0 | | 425.3 | 216.0 | 565.0 | 102.4 | | 37.3 | 26.8 | 84.4 | 135.0 | 6679 |
| Var | -9.5 | 0.5 | -0.8 | 2.1 | 4.0 | | 8.4 | 2.3 | -8.6 | -54.4 | 1.6 | 10.7 | | | | | 1.9 | | -7.5 | -2.4 | 5.6 | 4.7 | | 0.8 | 18.9 | -2.1 | -6.0 | |
| Var % | - 3.7% | + 7.4% | - 1.1% | + 1.7% | + 0.4% | | + 24.2% | + 0.3% | - 0.6% | - 8.6% | + 3.8% | + 1.5% | | | | | + 6.9% | | - 1.7% | - 1.1% | + 1.0% | + 4.8% | | + 2.2% | + 238.0% | - 2.5% | - 4.3% | |
| 2022 | 245.0 | 6.9 | 72.0 | 125.0 | 1039.0 | | | 670.0 | 1395.0 | 615.0 | 41.0 | 740.0 | | | | | 32.0 | | 409.9 | 212.0 | 560.0 | 98.2 | | 37.9 | | 83.0 | 137.0 | 6519 |
| Var | 0.0 | 0.2 | 0.3 | 1.7 | -55.0 | | | -10.0 | -31.0 | 36.0 | -4.0 | -3.0 | | | | | 2.0 | | -15.4 | -4.0 | -5.0 | -4.2 | | 0.6 | | -1.4 | 2.0 | |
| Var % | idem | + 3.0% | + 0.4% | + 1.4% | - 5.0% | | | - 1.5% | - 2.2% | + 6.2% | - 8.9% | - 0.4% | | | | | + 6.7% | | - 3.6% | - 1.9% | - 0.9% | - 4.1% | | + 1.6% | | - 1.7% | + 1.5% | |

Sources : 2012 & 2013 from Estat NewCronos, 2014 & 2015 from Member States

XX : Member States who have communicated figures

29 March 2021

Short term Outlook – Autumn 2021



- EU beef production is expected to decrease moderately in 2021
- Due to higher feed prices, additional slaughtering can be expected in the second half of 2021. Moreover, the gradually improving economic situation and the current favorable prices in the EU will limit further decline in beef production, at only -0.5% in 2021, before resuming its downward trend in 2022 (-0.9%)
- The declining development of apparent consumption may continue in 2021 (-0.6%), despite the expected recovery of demand in the second half of 2021

TRADE

EU EXPORTS

Beef & Live Animals

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

| Destinations | 2017 | | 2018 | | 2019 | | 2020 | | Jan-Aug 21 | | Compared to |
|---------------------------|----------------|-------|----------------|-------|----------------|-------|----------------|-------|----------------|-------|-------------|
| | tonnes | % | tonnes | % | tonnes | % | tonnes | % | tonnes | % | |
| Israel | 44 196 | 6.1% | 47 774 | 6.8% | 49 629 | 7.1% | 56 974 | 8.1% | 46 249 | 9.8% | + 27.5% |
| Hong Kong | 76 086 | 10.5% | 55 537 | 7.9% | 46 748 | 6.7% | 56 860 | 8.1% | 34 082 | 7.2% | + 1.4% |
| Ghana | 37 744 | 5.2% | 36 766 | 5.2% | 39 196 | 5.6% | 47 408 | 6.7% | 33 013 | 7.0% | + 8.4% |
| Philippines | 37 102 | 5.1% | 28 766 | 4.1% | 34 158 | 4.9% | 39 920 | 5.7% | 31 087 | 6.6% | + 16.9% |
| Bosnia-Herz. | 34 711 | 4.8% | 38 762 | 5.5% | 41 119 | 5.9% | 35 758 | 5.1% | 26 966 | 5.7% | + 19.6% |
| Switzerland | 26 708 | 3.7% | 23 761 | 3.4% | 25 188 | 3.6% | 29 996 | 4.3% | 22 282 | 4.7% | + 14.5% |
| Ivory Coast | 36 038 | 5.0% | 36 064 | 5.1% | 33 396 | 4.8% | 32 460 | 4.6% | 21 276 | 4.5% | - 4.5% |
| Algeria | 26 305 | 3.6% | 35 410 | 5.0% | 57 152 | 8.2% | 39 416 | 5.6% | 18 617 | 3.9% | - 28.6% |
| Lebanon | 38 322 | 5.3% | 42 542 | 6.1% | 36 393 | 5.2% | 33 656 | 4.8% | 15 151 | 3.2% | - 18.9% |
| Norway | 12 850 | 1.8% | 7 925 | 1.1% | 7 667 | 1.1% | 12 936 | 1.8% | 14 629 | 3.1% | + 67.6% |
| Japan | 4 281 | 0.6% | 3 452 | 0.5% | 8 007 | 1.1% | 11 885 | 1.7% | 13 614 | 2.9% | + 57.8% |
| Libya | 27 848 | 3.8% | 27 878 | 4.0% | 24 541 | 3.5% | 22 188 | 3.1% | 12 784 | 2.7% | - 20.4% |
| Canada | 2 424 | 0.3% | 2 225 | 0.3% | 6 806 | 1.0% | 20 475 | 2.9% | 11 694 | 2.5% | - 17.7% |
| Kosovo | 6 377 | 0.9% | 6 693 | 1.0% | 10 279 | 1.5% | 10 912 | 1.5% | 10 882 | 2.3% | + 75.4% |
| Ukraine | 7 331 | 1.0% | 10 465 | 1.5% | 13 836 | 2.0% | 15 857 | 2.3% | 9 823 | 2.1% | + 2.0% |
| North Macedonia | 9 627 | 1.3% | 10 191 | 1.5% | 11 975 | 1.7% | 10 686 | 1.5% | 9 080 | 1.9% | + 34.6% |
| Other Destinations | 299 571 | 41.2% | 287 670 | 41.0% | 254 155 | 36.3% | 227 209 | 32.2% | 142 104 | 30.0% | |
| Total (without UK) | 727 522 | | 701 882 | | 700 245 | | 704 596 | | 473 333 | | |
| % change | | | - 4% | | - 0% | | + 1% | | + 4.9% | | |

TRADE

EU EXPORTS

Beef

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

Destinations

| | 2017 | | 2018 | | 2019 | | 2020 | | Jan-Aug 21 | | Compared to |
|---------------------------|----------------|-------|----------------|-------|----------------|-------|----------------|-------|----------------|-------|-------------|
| | tonnes | % | tonnes | % | tonnes | % | tonnes | % | tonnes | % | |
| Hong Kong | 76 086 | 15.5% | 55 537 | 11.9% | 46 748 | 9.8% | 56 860 | 11.6% | 34 082 | 10.0% | + 1.4% |
| Ghana | 37 744 | 7.7% | 36 766 | 7.9% | 39 196 | 8.2% | 47 408 | 9.7% | 33 013 | 9.7% | + 8.4% |
| Philippines | 37 102 | 7.5% | 28 766 | 6.2% | 34 158 | 7.2% | 39 920 | 8.1% | 31 087 | 9.1% | + 16.9% |
| Bosnia-Herz. | 32 181 | 6.5% | 36 152 | 7.7% | 38 806 | 8.2% | 33 459 | 6.8% | 25 249 | 7.4% | + 18.7% |
| Switzerland | 25 570 | 5.2% | 22 710 | 4.9% | 24 110 | 5.1% | 28 941 | 5.9% | 21 333 | 6.3% | + 14.1% |
| Ivory Coast | 36 028 | 7.3% | 36 064 | 7.7% | 33 396 | 7.0% | 32 460 | 6.6% | 21 276 | 6.2% | - 4.5% |
| Israel | 18 750 | 3.8% | 22 163 | 4.7% | 23 026 | 4.8% | 21 967 | 4.5% | 15 755 | 4.6% | + 3.6% |
| Norway | 12 849 | 2.6% | 7 922 | 1.7% | 7 667 | 1.6% | 12 936 | 2.6% | 14 629 | 4.3% | + 67.6% |
| Japan | 4 281 | 0.9% | 3 452 | 0.7% | 8 007 | 1.7% | 11 885 | 2.4% | 13 614 | 4.0% | + 57.8% |
| Canada | 2 424 | 0.5% | 2 225 | 0.5% | 6 806 | 1.4% | 20 475 | 4.2% | 11 694 | 3.4% | - 17.7% |
| Ukraine | 6 926 | 1.4% | 9 887 | 2.1% | 12 893 | 2.7% | 14 861 | 3.0% | 9 173 | 2.7% | + 2.0% |
| North Macedonia | 11 285 | 2.3% | 10 002 | 2.1% | 11 395 | 2.4% | 10 551 | 2.1% | 8 995 | 2.6% | + 36.1% |
| USA | 3 756 | 0.8% | 5 458 | 1.2% | 7 867 | 1.7% | 12 310 | 2.5% | 8 152 | 2.4% | + 8.0% |
| South Africa | 4 555 | 0.9% | 7 214 | 1.5% | 5 442 | 1.1% | 7 743 | 1.6% | 7 115 | 2.1% | + 70.1% |
| Vietnam | 12 146 | 2.5% | 8 163 | 1.7% | 10 014 | 2.1% | 6 367 | 1.3% | 4 990 | 1.5% | + 20.9% |
| Angola | 10 982 | 2.2% | 11 470 | 2.5% | 8 410 | 1.8% | 9 391 | 1.9% | 4 508 | 1.3% | - 17.8% |
| Other Destinations | 159 714 | 32.4% | 162 871 | 34.9% | 157 379 | 33.1% | 123 328 | 25.1% | 76 506 | 22.4% | |
| Total (without UK) | 492 379 | | 466 823 | | 475 318 | | 490 862 | | 341 170 | | |
| % change | | | - 5% | | + 2% | | + 3% | | + 5.9% | | |

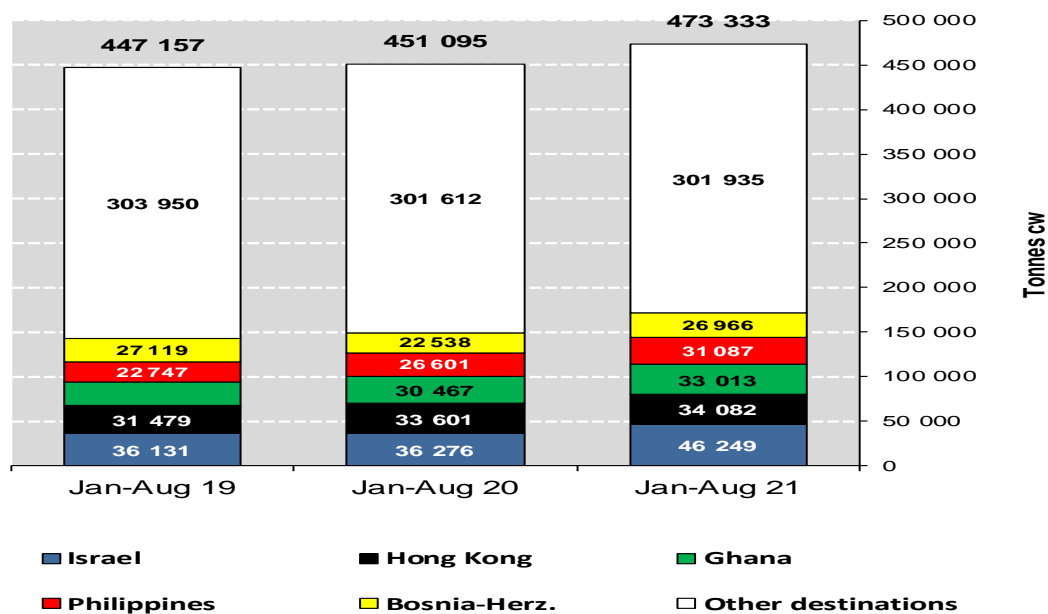
TRADE

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

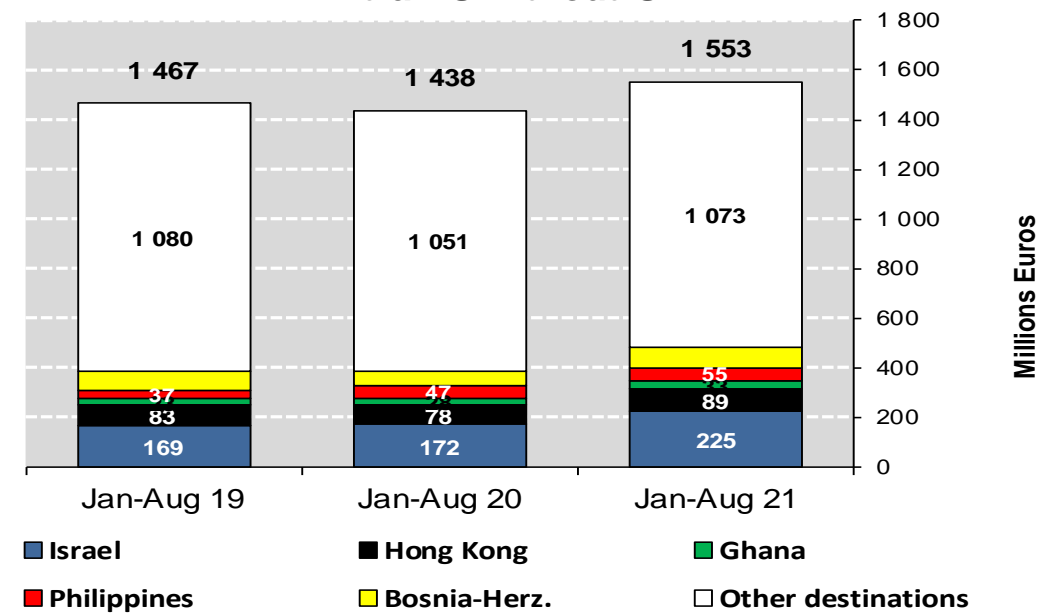
EU EXPORTS

Beef & Live Animals

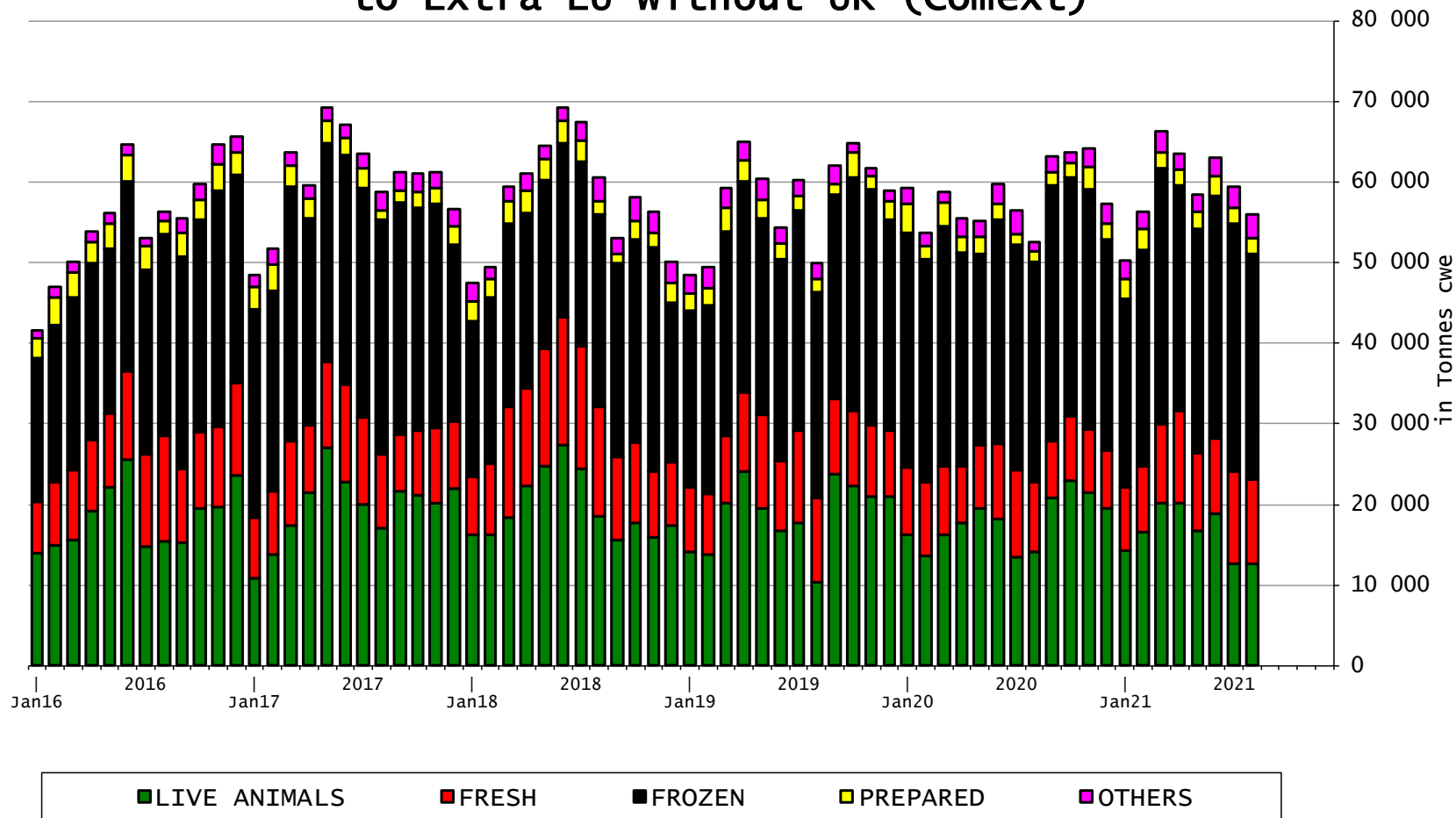
**EU EXPORTS of Beef & Veal (Tonnes cwe)
to Extra EU without UK**



**EU EXPORTS of Beef & Veal (Million EUR) to
Extra EU without UK**



EU Exports of BEEF products
to Extra EU without UK (Comext)



TRADE

EU IMPORTS Beef & Live Animals

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

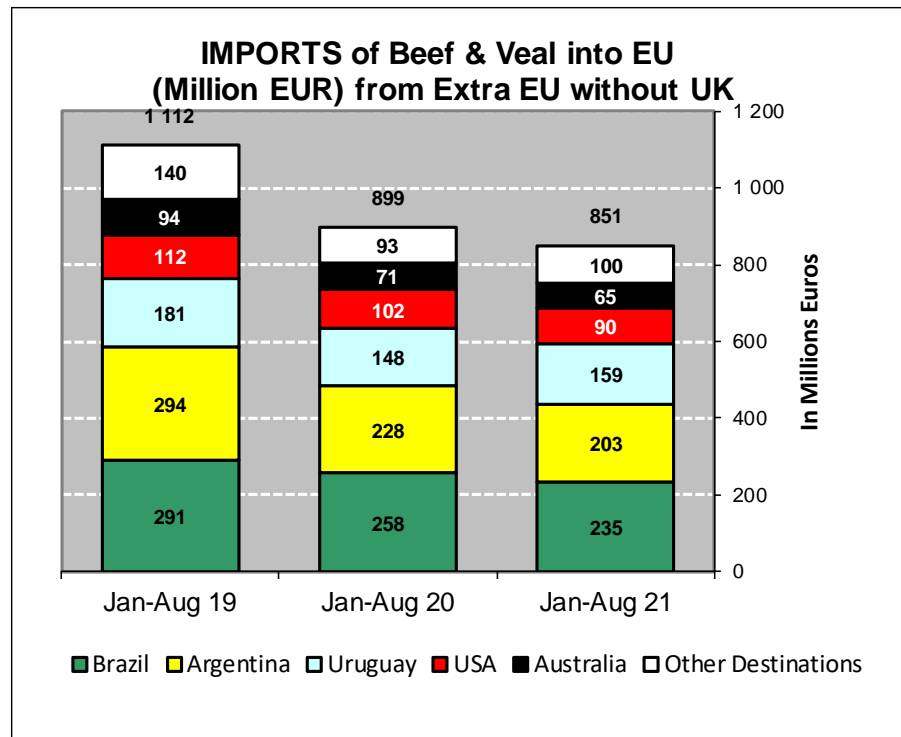
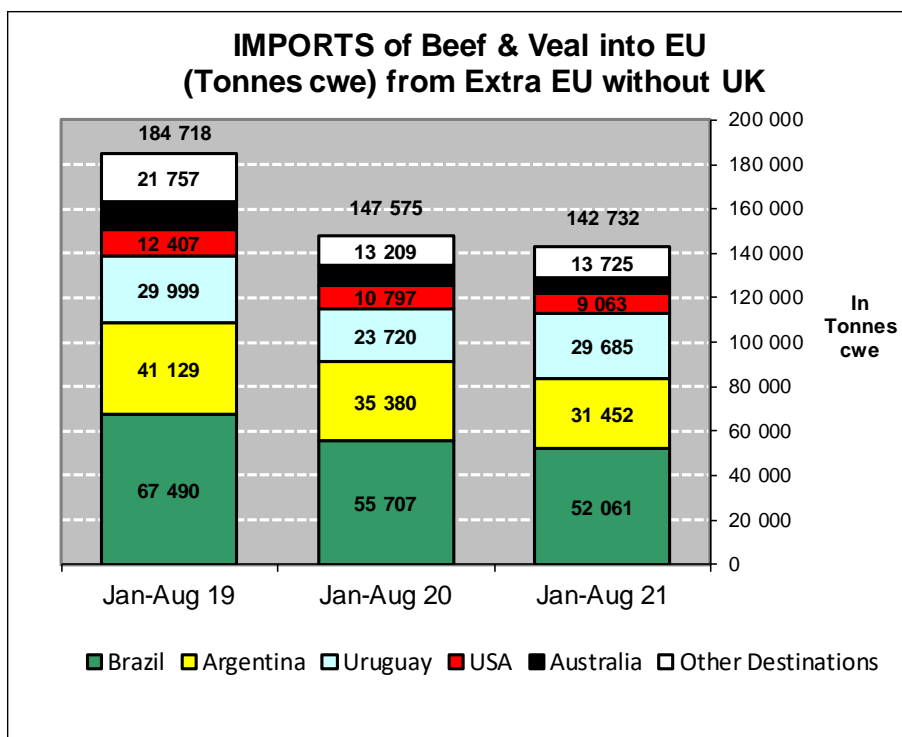
| Origins | 2017 | | 2018 | | 2019 | | 2020 | | Jan-Aug 21 | | Compared to |
|---------------------------|----------------|-------|----------------|-------|----------------|-------|----------------|-------|----------------|-------|-------------|
| | tonnes | % | tonnes | % | tonnes | % | tonnes | % | tonnes | % | |
| Brazil | 86 927 | 33.9% | 103 979 | 37.3% | 99 569 | 36.4% | 84 172 | 37.6% | 52 061 | 36.5% | - 6.5% |
| Argentina | 49 259 | 19.2% | 61 400 | 22.0% | 65 324 | 23.9% | 56 421 | 25.2% | 31 452 | 22.0% | - 11.1% |
| Uruguay | 52 078 | 20.3% | 47 922 | 17.2% | 40 483 | 14.8% | 34 595 | 15.5% | 29 685 | 20.8% | + 25.1% |
| USA | 21 624 | 8.4% | 19 268 | 6.9% | 16 852 | 6.2% | 16 532 | 7.4% | 9 063 | 6.3% | - 16.1% |
| Australia | 18 193 | 7.1% | 17 368 | 6.2% | 16 516 | 6.0% | 11 058 | 4.9% | 6 746 | 4.7% | - 23.0% |
| Switzerland | 5 105 | 2.0% | 5 413 | 1.9% | 4 401 | 1.6% | 4 197 | 1.9% | 2 945 | 2.1% | + 12.1% |
| New Zealand | 6 806 | 2.7% | 7 165 | 2.6% | 6 726 | 2.5% | 6 145 | 2.7% | 2 844 | 2.0% | - 28.9% |
| Paraguay | 5 922 | 2.3% | 5 520 | 2.0% | 5 203 | 1.9% | 4 234 | 1.9% | 2 419 | 1.7% | - 14.2% |
| N.det.Extra | 72 | 0.0% | 127 | 0.0% | 196 | 0.1% | 94 | 0.0% | 1 339 | 0.9% | +++ |
| Canada | 512 | 0.2% | 1 343 | 0.5% | 2 518 | 0.9% | 1 550 | 0.7% | 1 093 | 0.8% | + 80.7% |
| Japan | 645 | 0.3% | 791 | 0.3% | 997 | 0.4% | 789 | 0.4% | 807 | 0.6% | + 86.1% |
| Namibia | 5 043 | 2.0% | 3 442 | 1.2% | 7 706 | 2.8% | 1 445 | 0.6% | 675 | 0.5% | - 36.4% |
| Serbia | 565 | 0.2% | 1 134 | 0.4% | 1 062 | 0.4% | 931 | 0.4% | 607 | 0.4% | + 0.6% |
| Norway | 388 | 0.2% | 153 | 0.1% | 129 | 0.0% | 336 | 0.2% | 321 | 0.2% | +++ |
| Botswana | 2 686 | 1.0% | 3 119 | 1.1% | 4 950 | 1.8% | 788 | 0.4% | 249 | 0.2% | - 56.3% |
| Chile | 319 | 0.1% | 356 | 0.1% | 392 | 0.1% | 168 | 0.1% | 125 | 0.1% | + 10.8% |
| Other Destinations | 579 | 0.2% | 318 | 0.1% | 287 | 0.1% | 298 | 0.1% | 302 | 0.2% | |
| Total (without UK) | 256 724 | | 278 818 | | 273 312 | | 223 752 | | 142 732 | | |
| % change | | | + 9% | | - 2% | | - 18% | | - 3.3% | | |

TRADE

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

EU IMPORTS

Beef & Live Animals

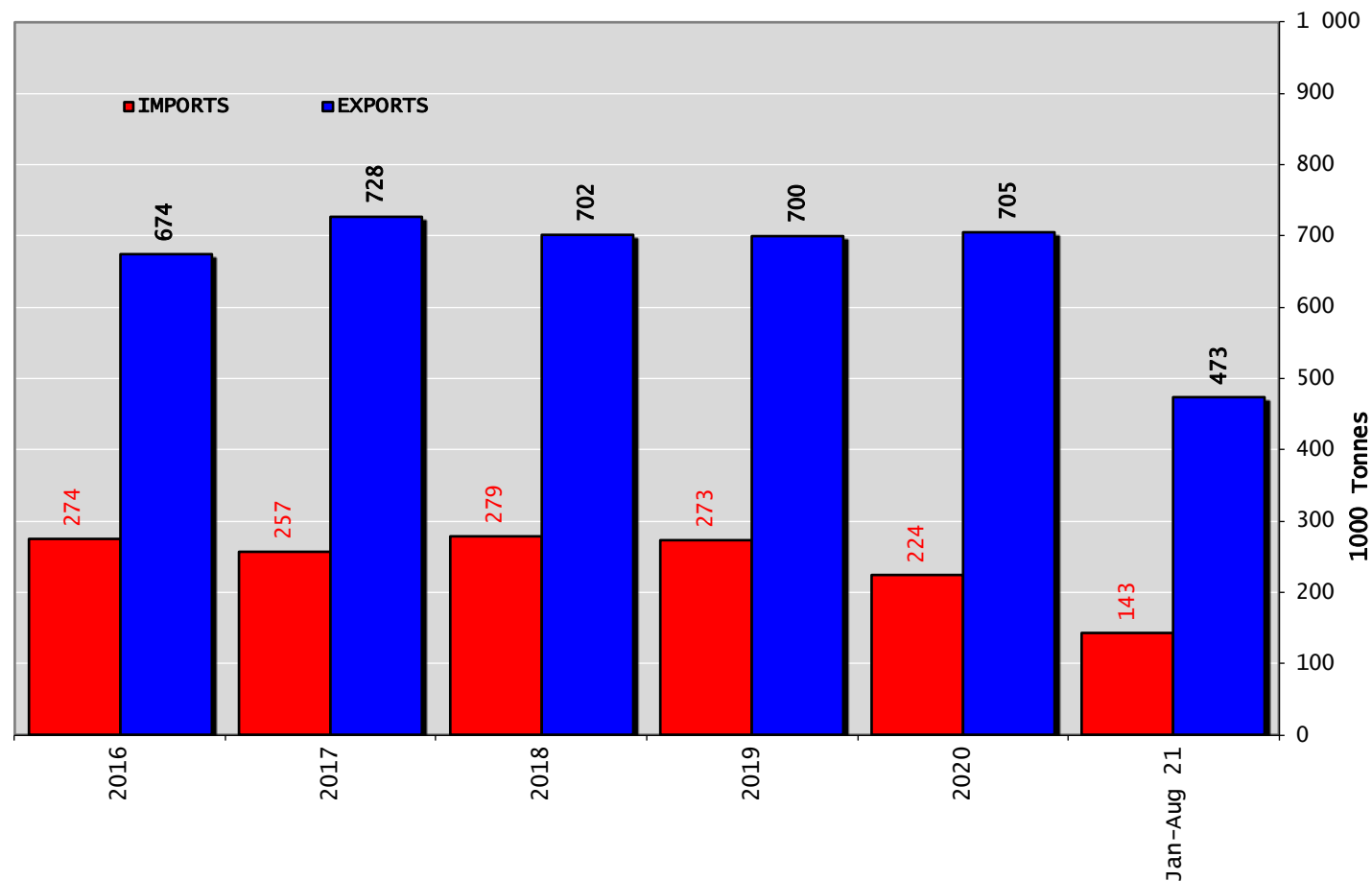


TRADE

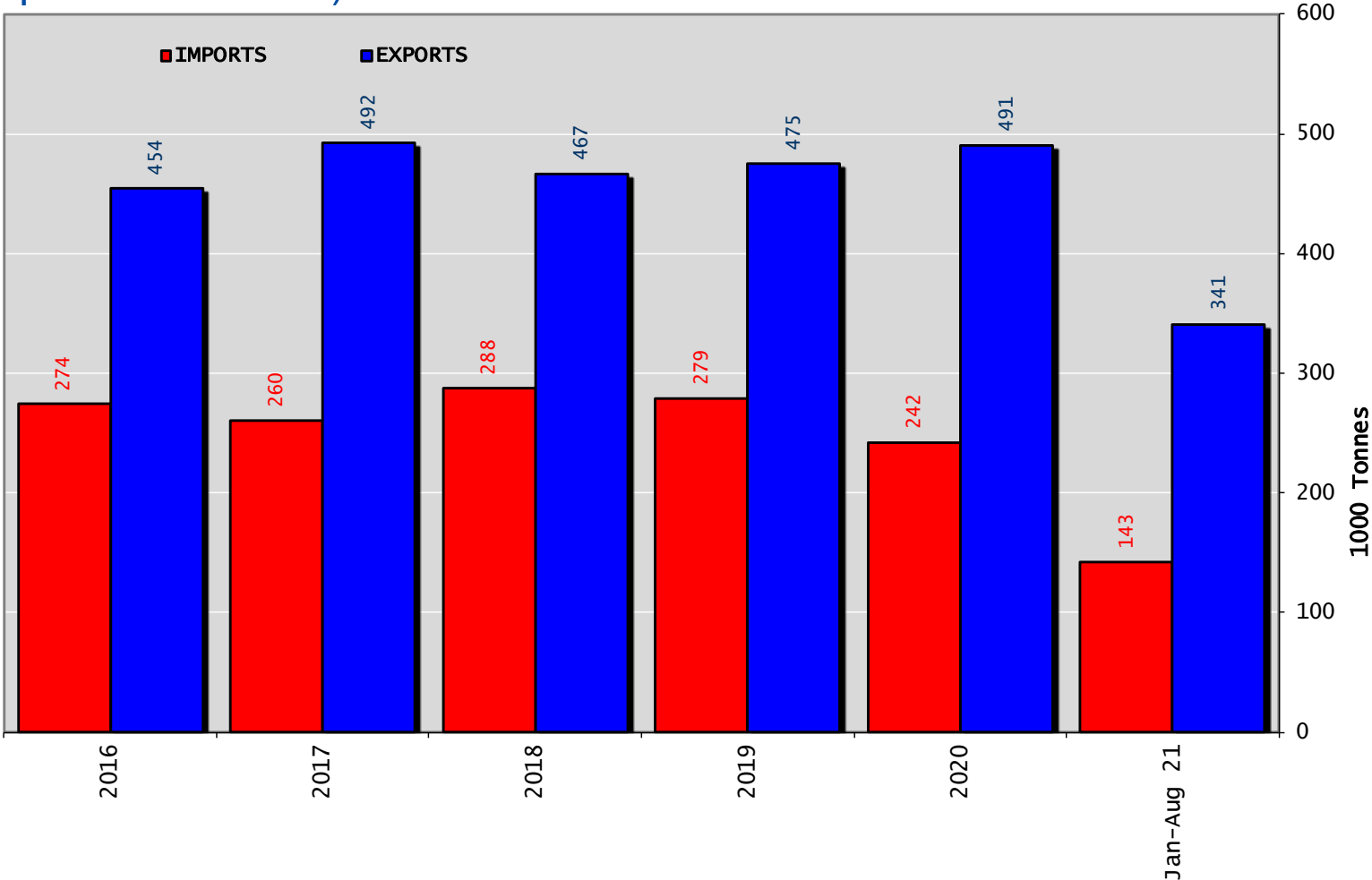
EUTRADE BALANCE

Beef & Live Animals

Trade Balance of Beef Products and Live Animals (without UK)



Trade Balance of Beef Products (Except Live Animals) without UK

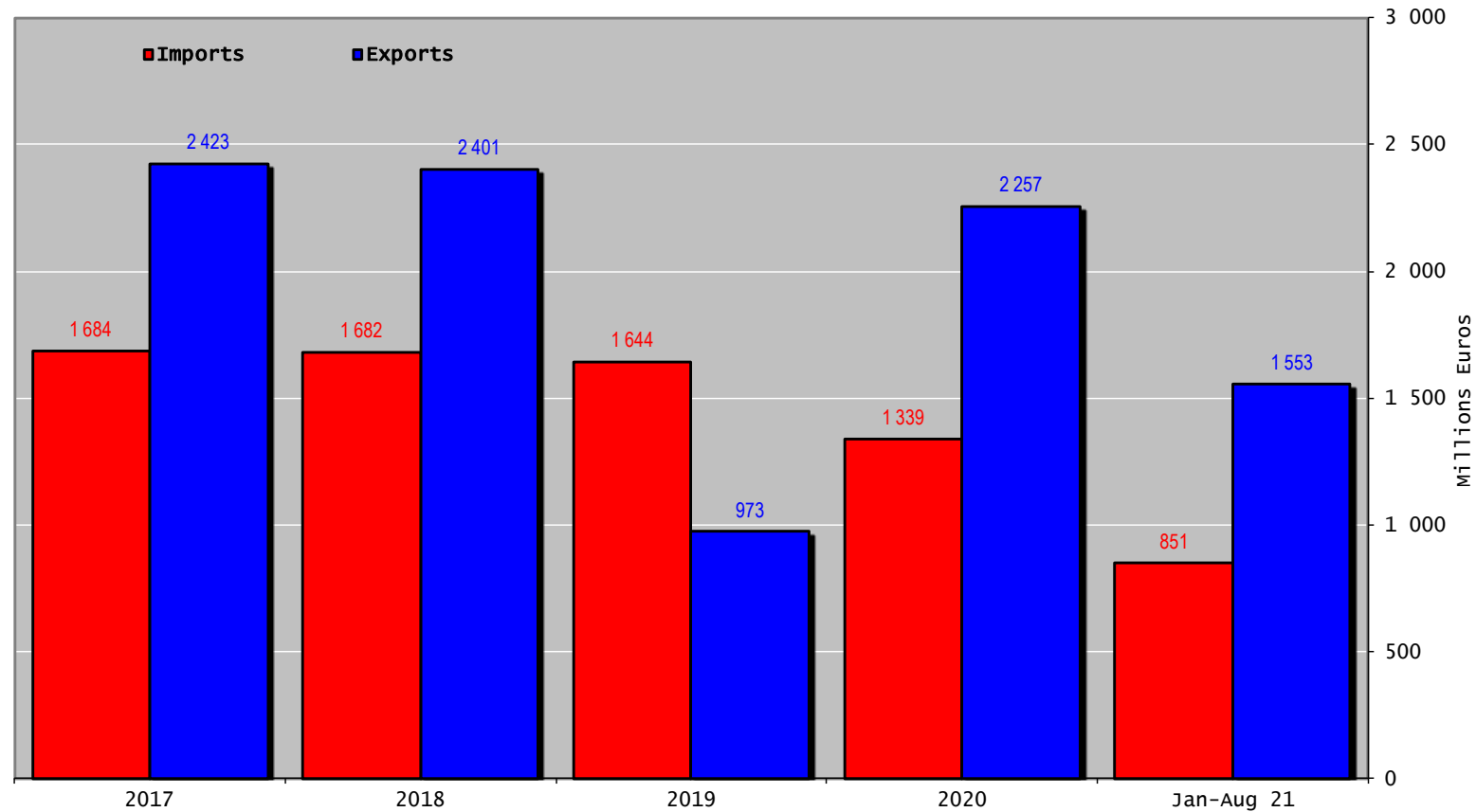


TRADE

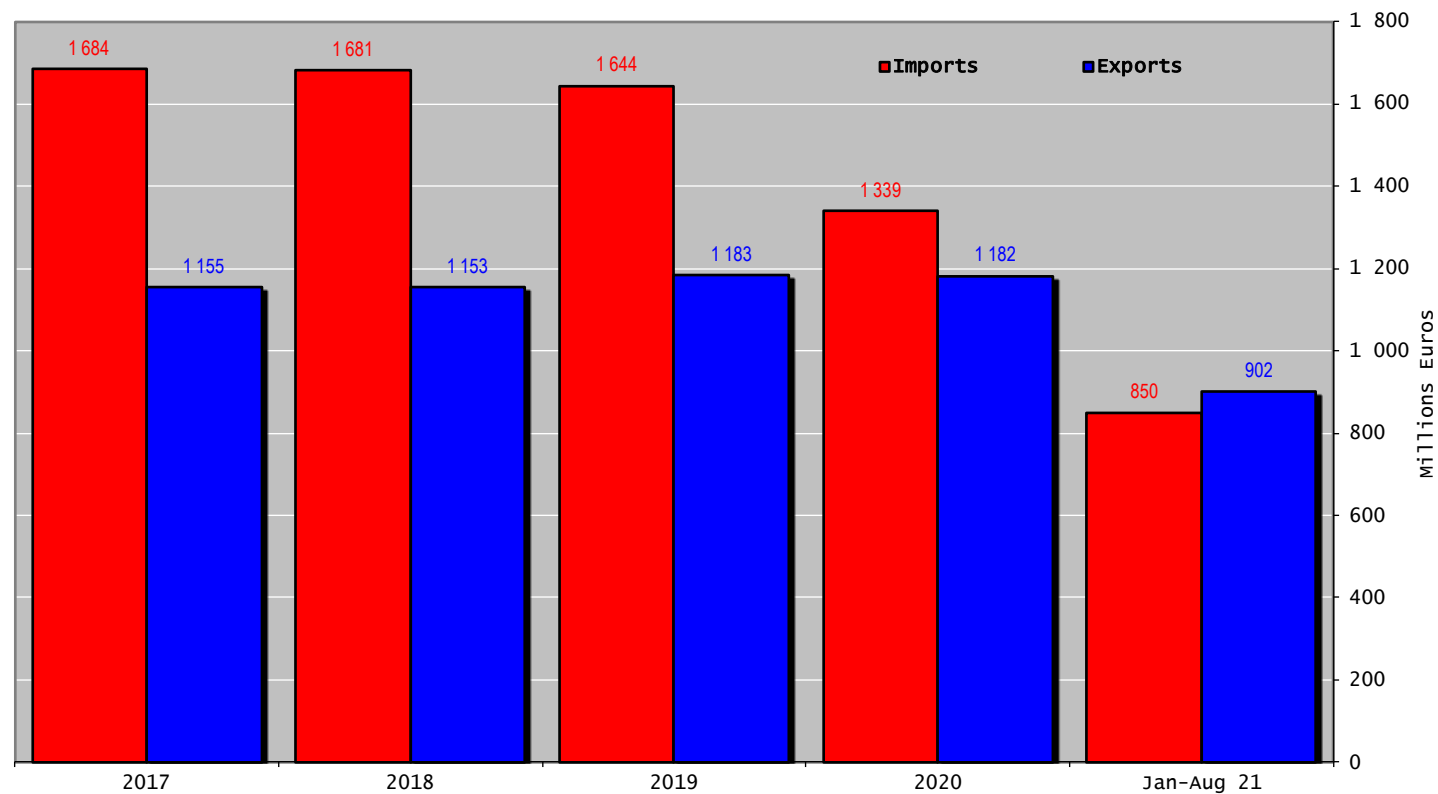
EU TRADE BALANCE

Beef & Live Animals

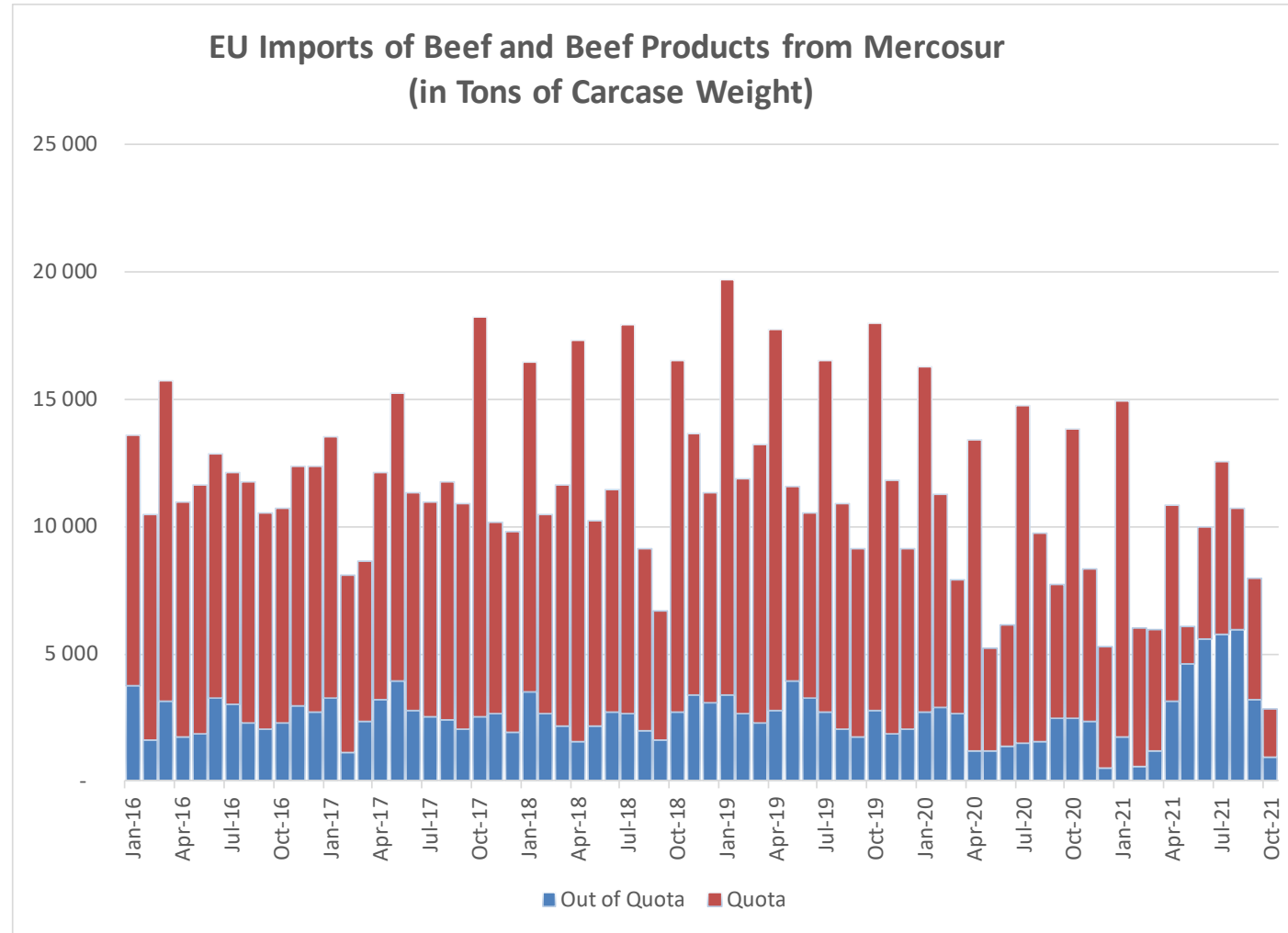
Trade Balance of Beef Products and Live Animals (without UK)



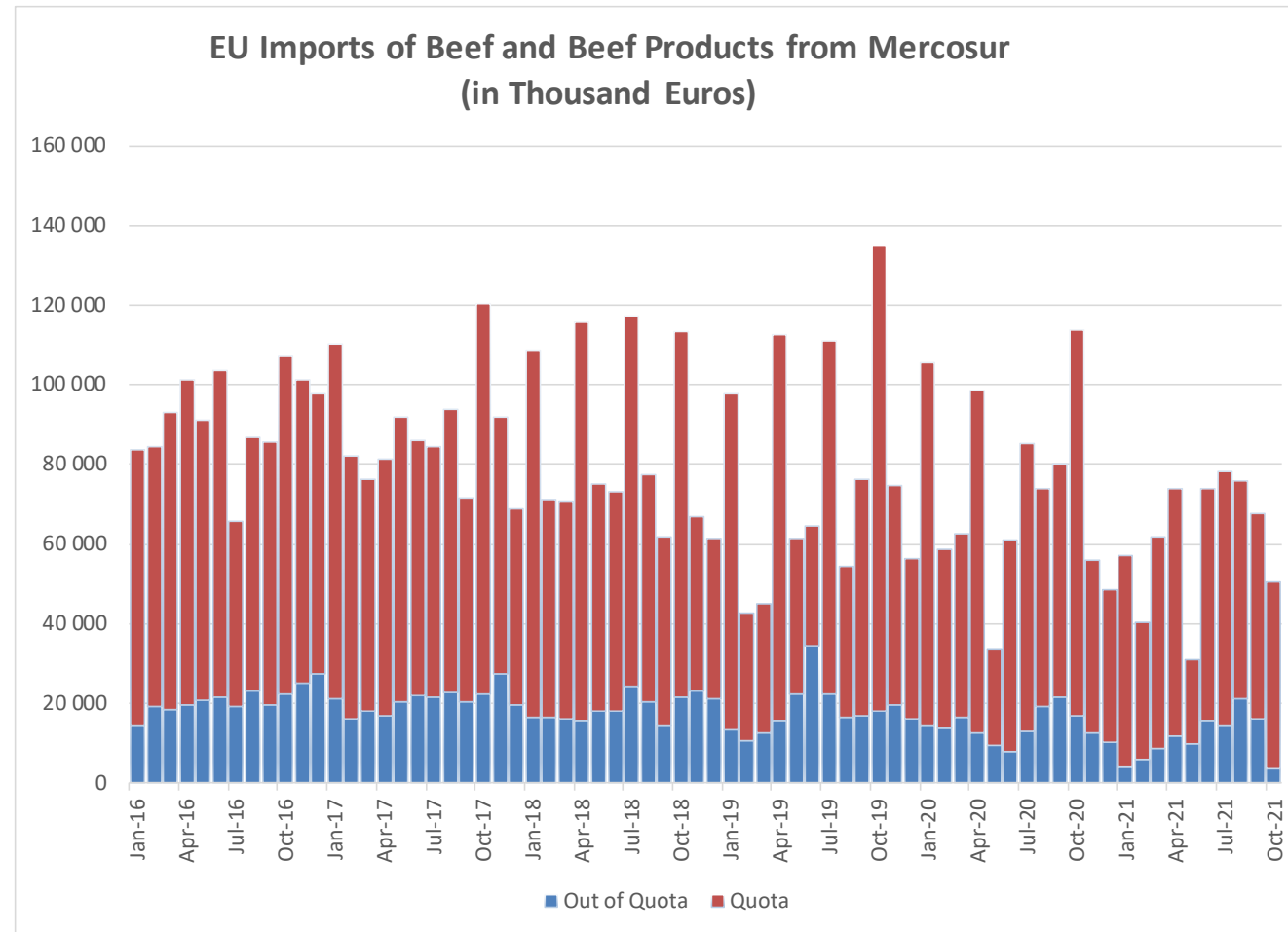
Trade Balance of Beef Products (Except Live Animals) without UK



Imports in and out of TRQs



Imports in and out of TRQs



High Quality Beef Import Quotas

Quota erga omnes

Regulation (EU) No 481/2012

| | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 | TOTAL |
|------------------|---------|---------|---------|---------|--------|
| Period 2019-2020 | 11 246 | 11 259 | 10 825 | 8 599 | 41 930 |
| Available | 11 250 | 11 250 | 11 250 | 11 250 | 45 000 |
| Use | 99.97% | 100.00% | 96.22% | 76.44% | 93.18% |

| | | | | | |
|--------------------------|--------|---------|--------|--------|--|
| Available after transfer | 11 250 | 11 254 | 11 241 | 11 675 | |
| | 99.97% | 100.00% | 96.30% | 73.66% | |

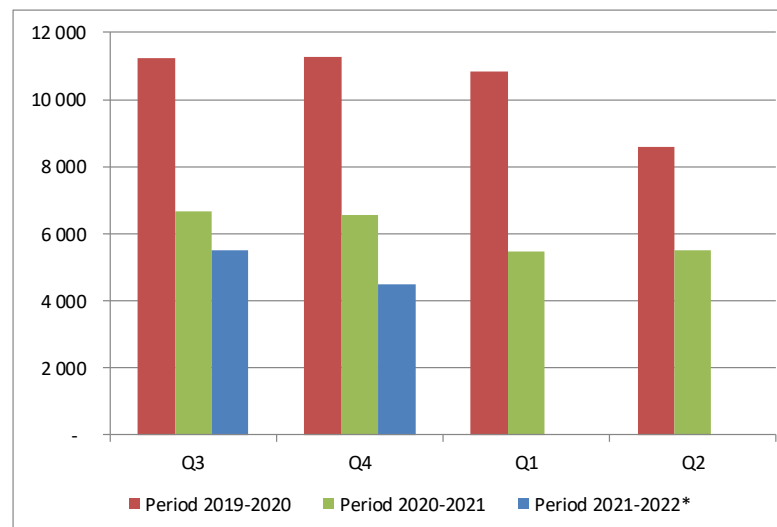
| | 2020-Q3* | 2020-Q4 | 2021-Q1 | 2021-Q2 | TOTAL |
|------------------|----------|---------|---------|---------|--------|
| Period 2020-2021 | 6 652 | 6 542 | 5 467 | 5 500 | 24 162 |
| Available | 6 625 | 6 625 | 5 500 | 5 500 | 45 000 |
| Use | 100.00% | 98.75% | 99.41% | 100.00% | 53.69% |

| | | | | | |
|--------------------------|--------|--------|--------|--------|--|
| Available after transfer | 11 250 | 6 598 | 5 583 | 5 533 | |
| | 59.13% | 99.16% | 97.93% | 99.41% | |

| | 2021-Q3* | 2021-Q4 | 2022-Q1 | 2022-Q2 | TOTAL |
|-------------------|----------|---------|---------|---------|--------|
| Period 2021-2022* | 5 502 | 4 480 | - | - | 9 982 |
| Available | 5 500 | 5 500 | 4 900 | 4 900 | 45 000 |
| Use | 100.00% | 81.45% | 0.00% | 0.00% | 22.18% |

| | | | | | |
|--------------------------|---------|--------|-------|-------|--|
| Available after transfer | 5 500 | 5 498 | 5 920 | 9 800 | |
| | 100.00% | 81.48% | 0.00% | 0.00% | |

* Until 14.10.2021

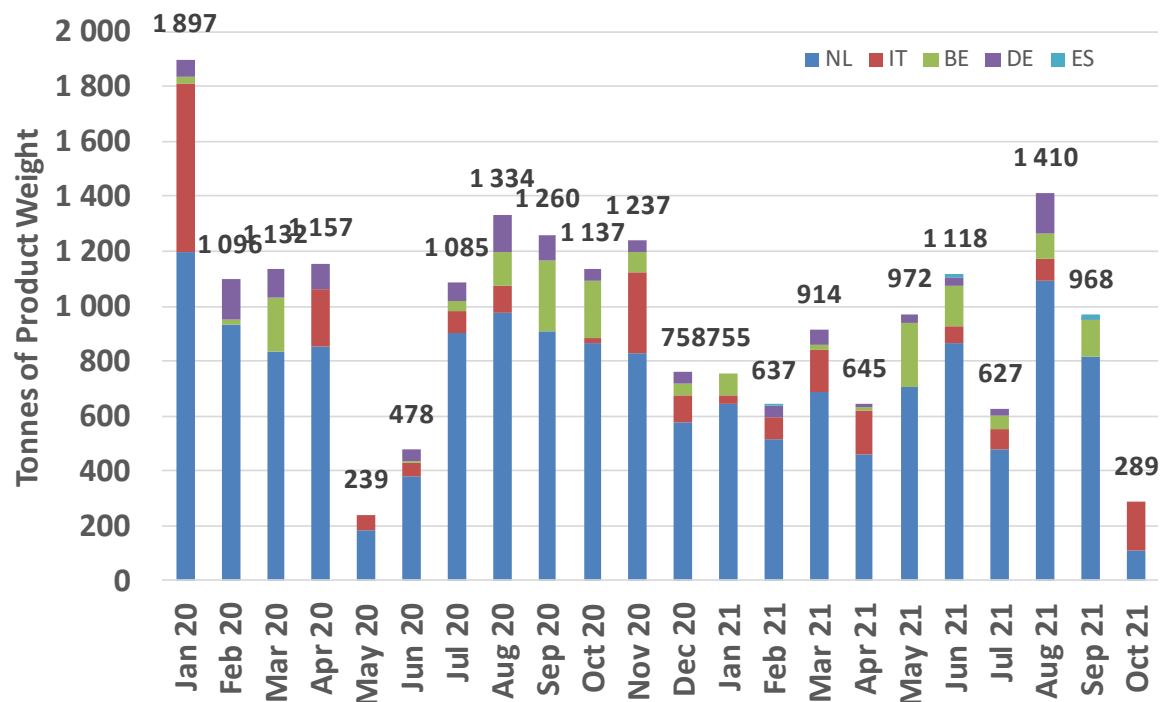


High Quality Beef Import Quotas

| Origin | GATT 2020-2021 | | | | |
|----------------------------------|----------------|--------------|--------------|--------------|---------------|
| | 2020-Q3 | 2020-Q4 | 2021-Q1 | 2021-Q2 | Total |
| NL | 2 785 | 2 274 | 1 848 | 2 026 | 8 933 |
| IT | 174 | 404 | 263 | 228 | 1 069 |
| BE | 417 | 330 | 96 | 394 | 1 237 |
| DE | 305 | 124 | 98 | 72 | 598 |
| ES | - | - | 2 | 15 | 17 |
| Total import within Quota | 3 680 | 3 132 | 2 306 | 2 735 | 11 853 |
| Available | 4 625 | 4 625 | 4 625 | 4 625 | 18 500 |
| Use | 79.57% | 67.72% | 49.87% | 59.13% | 64.07% |
| After transfer | 4 625 | 5 570 | 6 118 | 6 944 | |
| Use | 79.57% | 56.23% | 37.70% | 39.39% | |

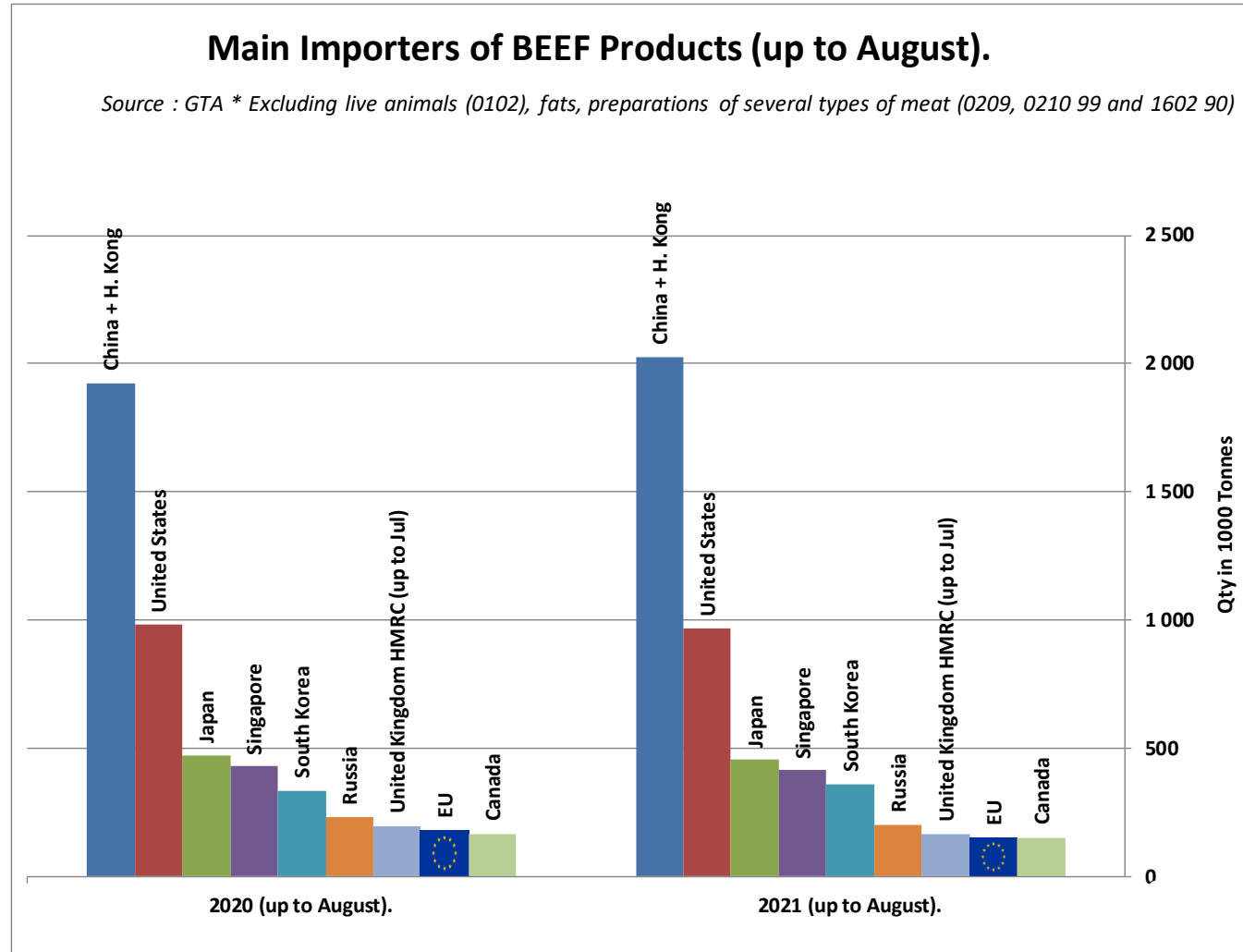
| Origin | GATT 2021-2022 | | | | |
|----------------------------------|----------------|---------|---------|---------|--------|
| | 2021-Q3 | 2021-Q4 | 2022-Q1 | 2022-Q2 | Total |
| NL | 2 384 | | | | |
| IT | 151 | | | | |
| BE | 282 | | | | |
| DE | 173 | | | | |
| ES | 15 | | | | |
| Total import within Quota | 3 005 | | | | |
| Available | 5 750 | 5 750 | 6 350 | 6 350 | 24 200 |
| Use | 52.26% | | | | |
| After transfer | 5 750 | | | | |
| Use | 52.26% | | | | |

EU use of Import Quota 09-2203



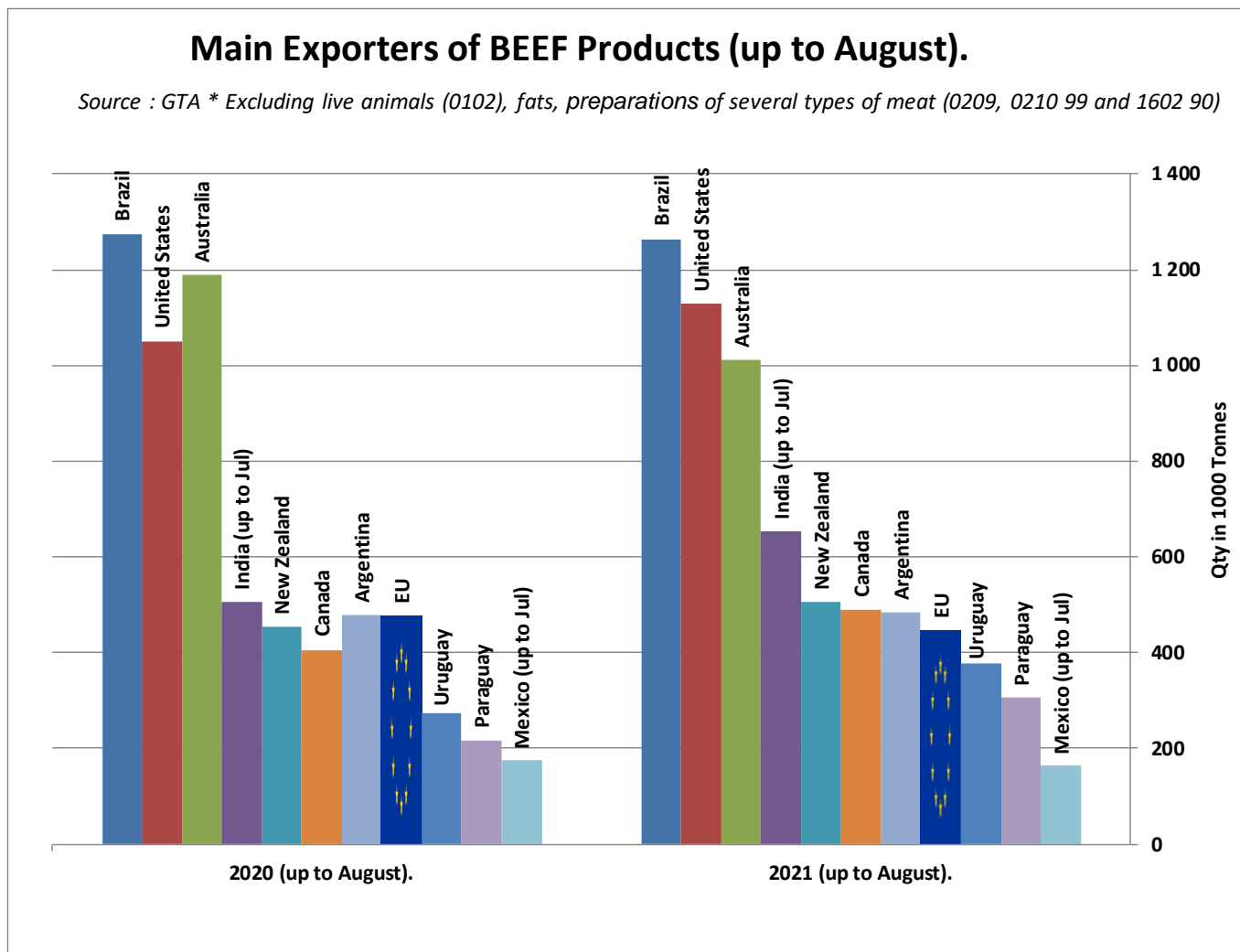
WORLD BEEF MARKET

E.U. + UK IMPORTS BEEF MAIN IMPORTERS



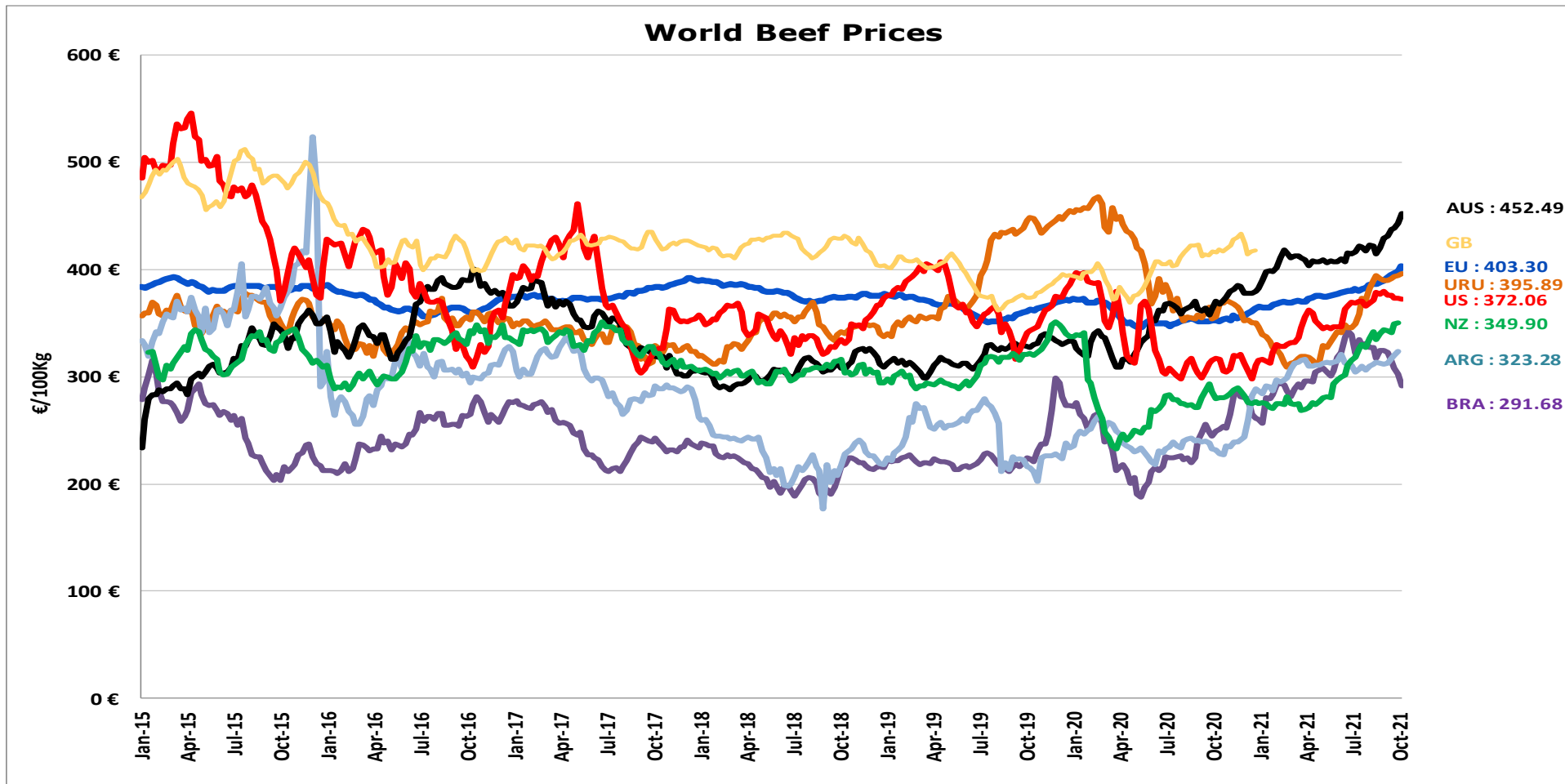
WORLD BEEF MARKET

E.U. + UK EXPORTS BEEF MAIN EXPORTERS



WORLD BEEF MARKET

STEER PRICES EU, US, AUS, NZ



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
BR <http://www.pecuaria.com.br/cotacoes.php>
NZ http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html

18 October 2021

THANK YOU VERY MUCH

More Information at:

EU Market Observatory

https://ec.europa.eu/agriculture/market-observatory/meat_en

And

Agri-FOOD data portal:

<http://agridata.ec.europa.eu/>

Thank you



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