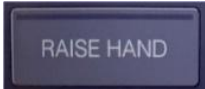
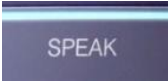


Beef Forecast Group

Netiquette

- Select your preferred language from Audio channel selector
- **Mute** yourself when you are not speaking to avoid echoes and background noises
- **Turn off** the **camera** when you are not speaking in order to save band width
- To speak: click on 
- When given a floor: click on 
- Keep your intervention short and to the point
- **Enjoy the meeting!**





Civil Dialogue Group on Animal Products

Working Group on Beef and Veal

29 March 2021

Agenda

- 1) EU beef and beef market situation
- 2) GIRA's presentation
- 3) 2021 beef and veal production and prices forecast
- 4) AOB

EU Bovine livestock evolution

(December survey)

1000 H	Total livestock	Bovine <1 y	Bovine 1-2 y	Bovine >2 y
EU	76 245	23 187	15 559	37 499
2020/2019	-1.2%	-1.0%	-1.3%	-1.2%



	Share	2020/2019
FR	23.1%	-3.2%
DE	14.8%	-2.9%
ES	8.7%	+0.5%
IE	8.6%	-0.5%
IT	8.4%	+0.4%
PL	8.2%	+0.3%

	Share	2020/2019
FR	37.0%	-0.4%
ES	19.4%	+1.5%
IE	8.5%	-3.6%
DE	5.8%	-2.1%
IT	3.4%	+2.8%
PL	2.5%	+10.9%



1000 H	Total cows	Dairy cows	Other cows
EU	31 344	20 545	10 796
2020/2019	-0.5%	-1.1%	+0.4%

PRODUCTION

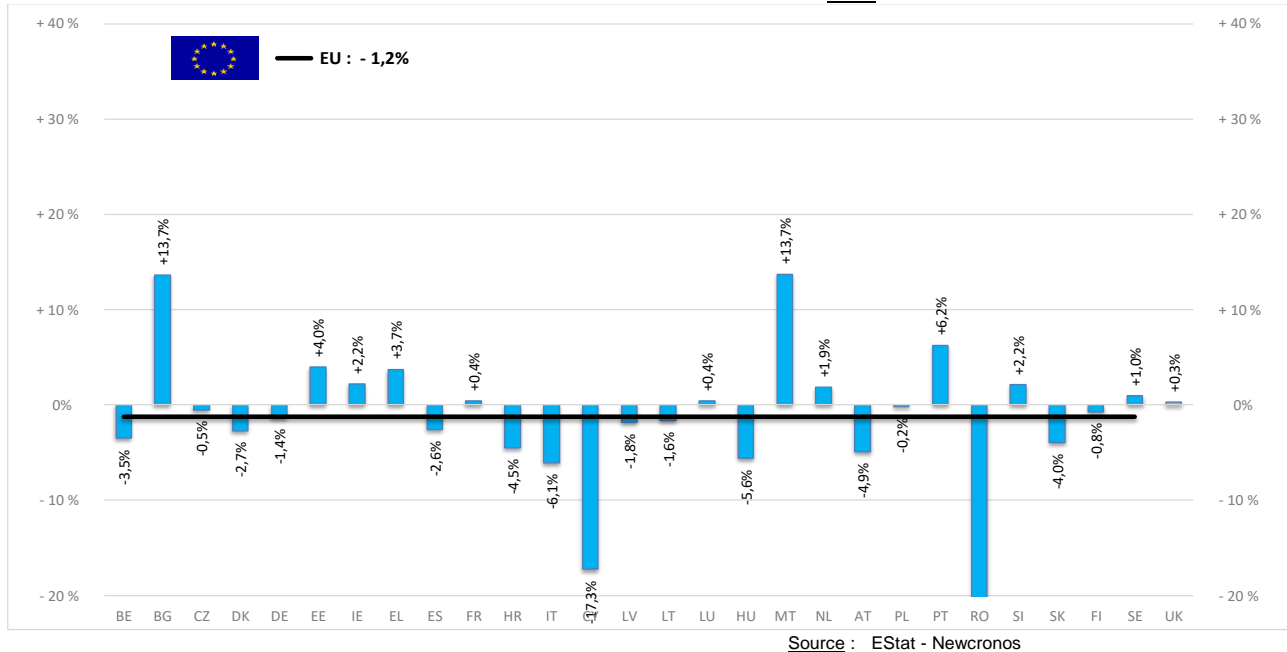
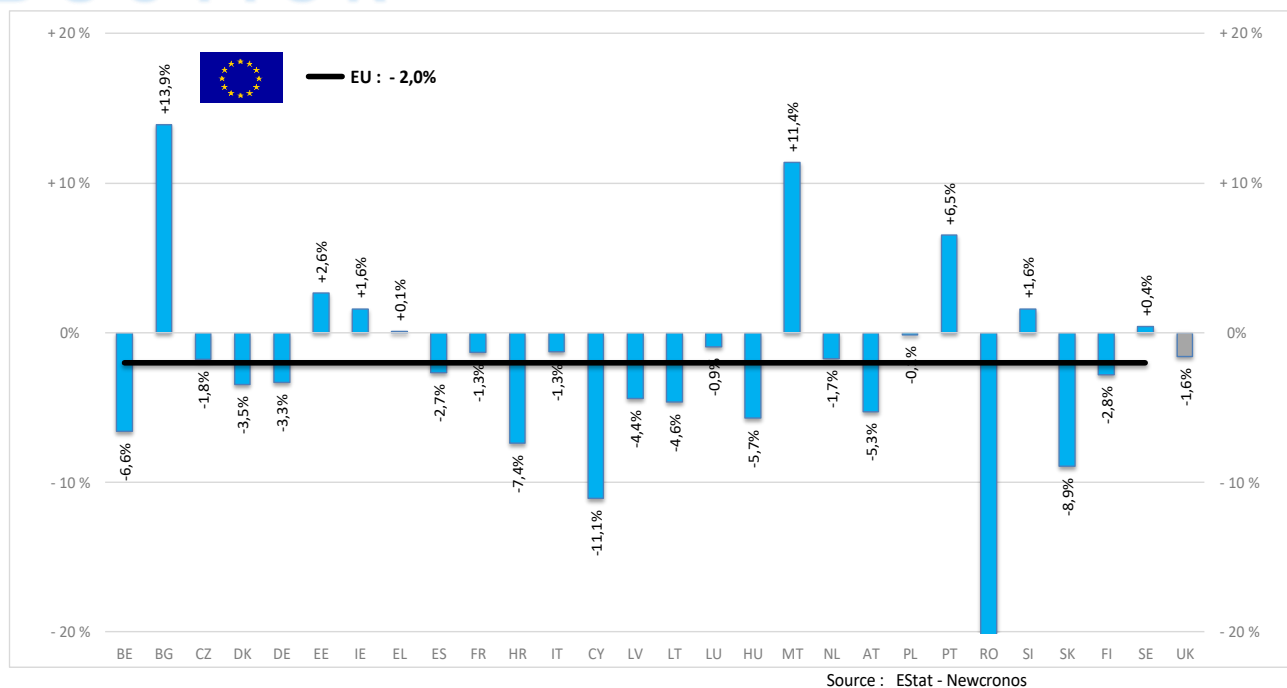
% EVOLUTION

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

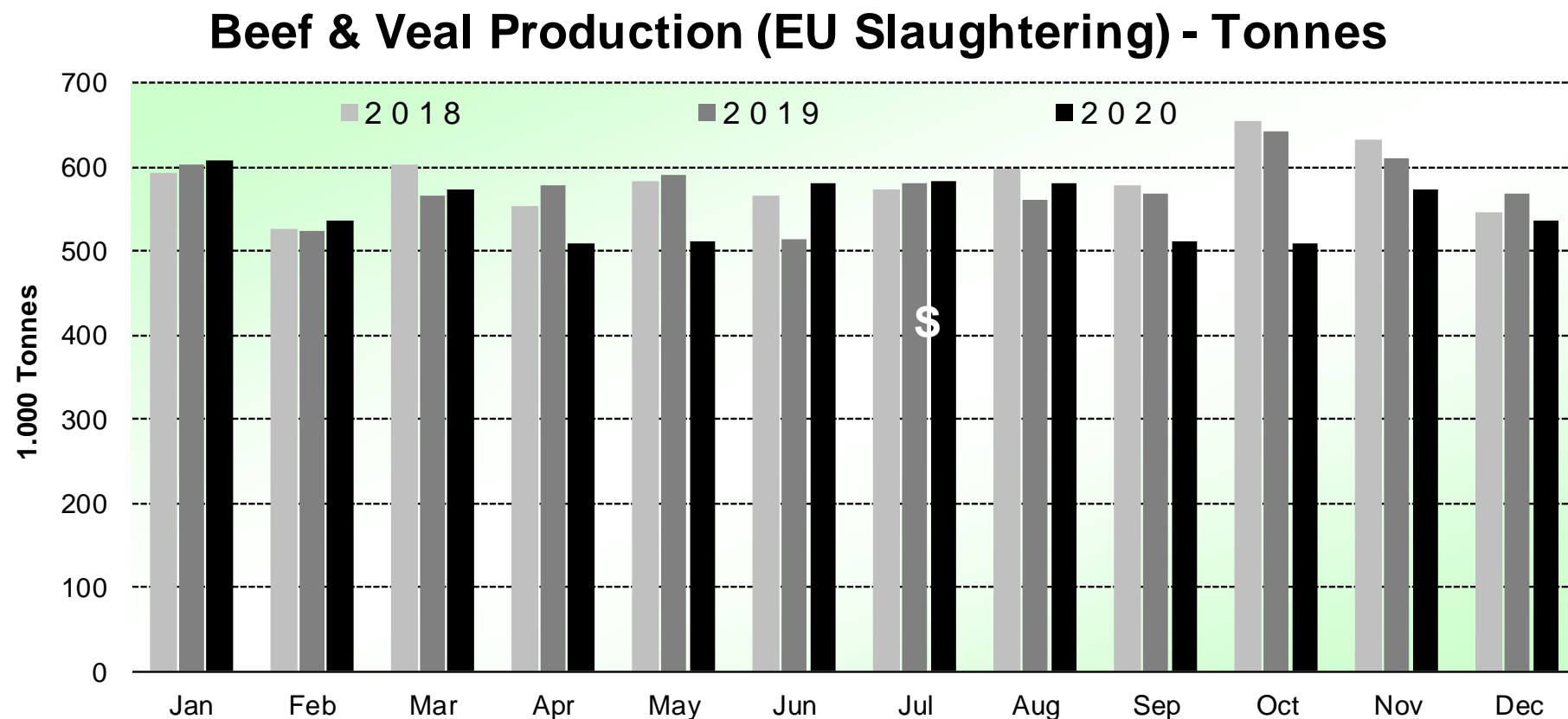
Estimates for last month of period :

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

Estimates for last month of period :

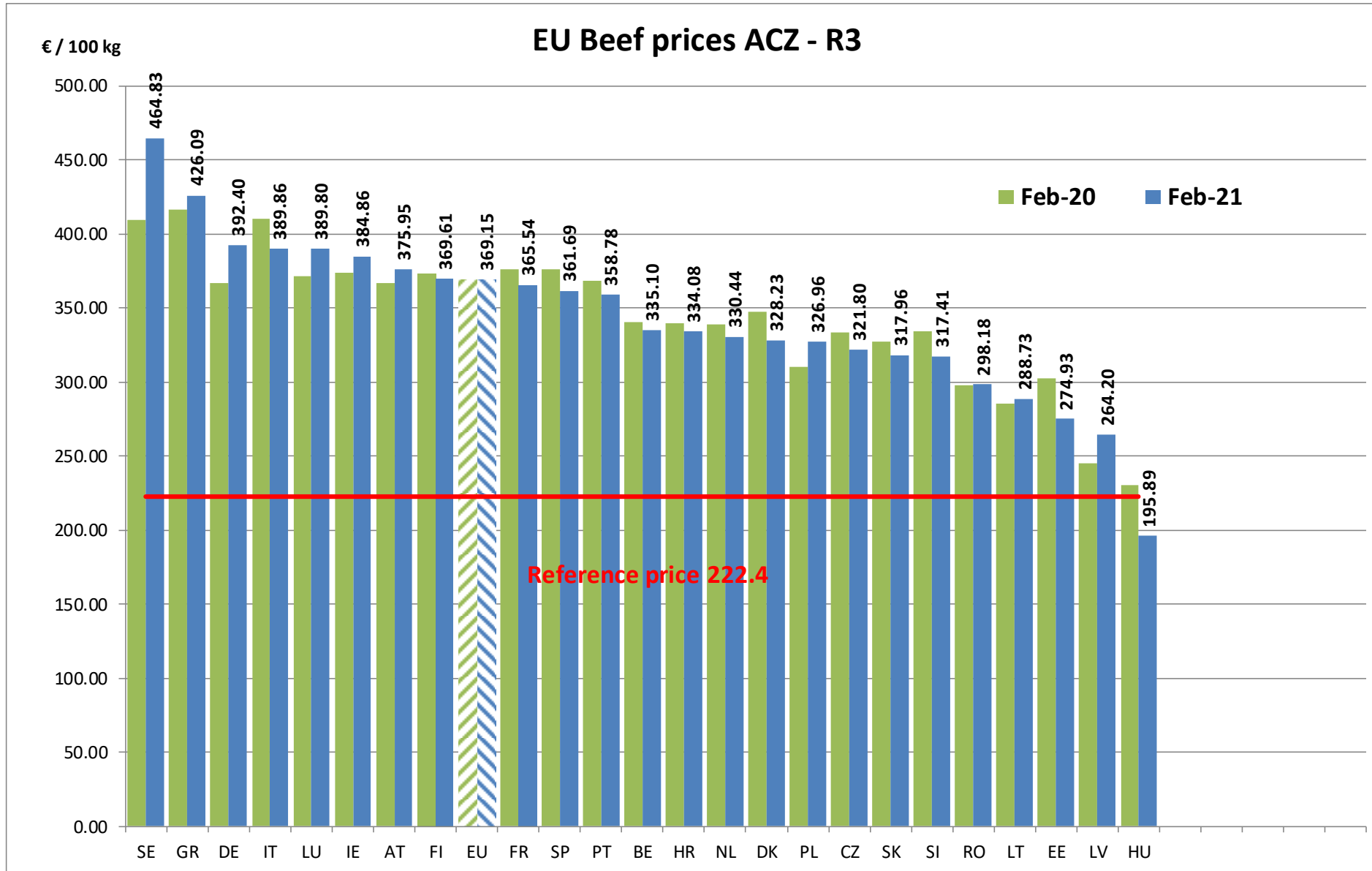


EU Slaughterings (tonnes)



Source : EStat-Newcronos

February 2021 EU beef prices



PRICES CARCASSES

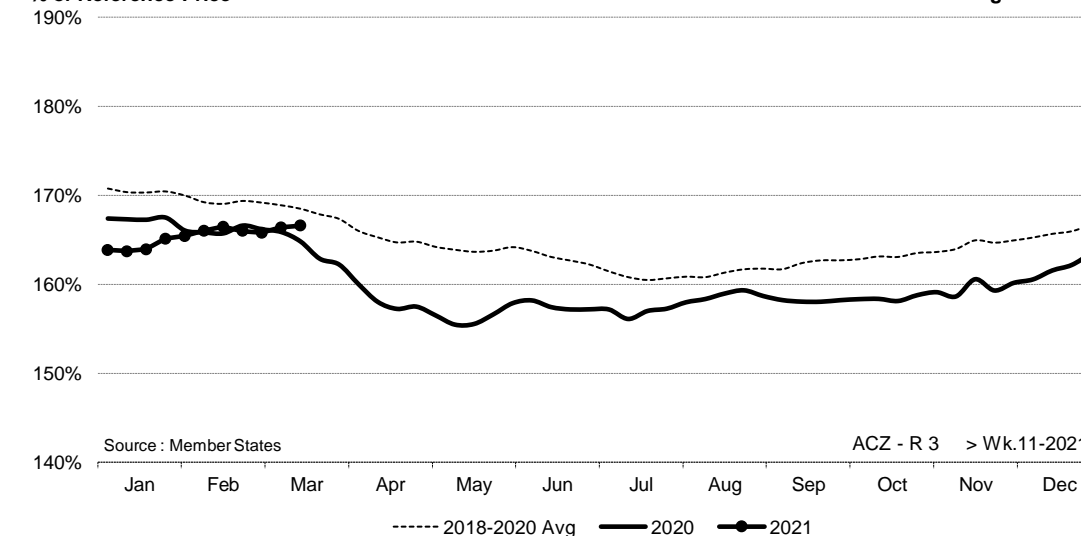
EU Prices week		11			Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	370,5	€/100 kg		+ 0,1%	+ 0,1%	+ 1,1%
	Young Bovines (Z)	366,2			+ 0,5%	+ 1,4%	+ 0,5%
	Young Bulls (A)	369,6			- 0,1%	- 0,4%	+ 1,7%
	Steers (C)	382,0			+ 0,6%	+ 1,6%	+ 3,4%
	Cows (D)	292,1			+ 0,8%	+ 3,5%	+ 3,1%
	Heifers (E)	379,2			+ 0,1%	+ 0,2%	+ 2,8%
Live Animals	Male Calves Dairy Type	69,22	€/head		+ 1,7%	+ 10,6%	- 17,5%
	Male Calves Beef Type	193,2			+ 1,8%	+ 5,1%	- 3,2%
	Young Store Cattle	2,42	€/kg		+ 0,2%	+ 0,9%	- 0,5%
	Yearling Male Store Cattle	2,27			+ 1,7%	+ 1,1%	+ 0,0%
	Yearling Female Store Cattle	2,48			- 0,7%	+ 0,4%	+ 5,1%
	Calves slaughtered <8M	493,0	€/100		- 0,9%	- 0,4%	- 6,7%

EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.11-2021

% of Reference Price

€/100 kg cwe



Price in week 11 : 370,52

% change y/y : + 1,09%

% Ref. Price in wk 11 : 166,6%

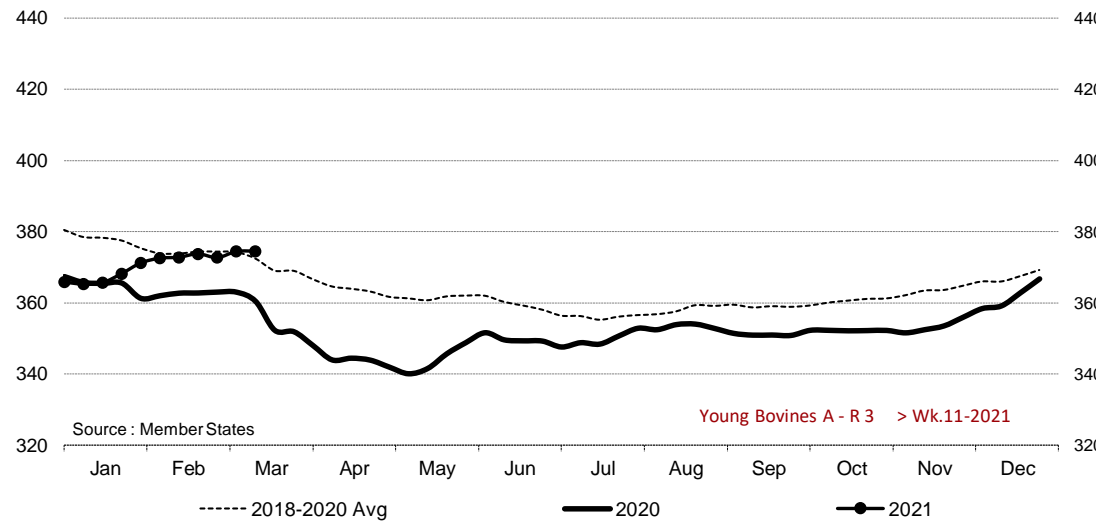
Average price in February 2021 : 369,16

% change y/y : - 0,05%

PRICES CARCASSES

Young bulls-A.R3

Young Bovines A - R 3 > Wk.11-2021

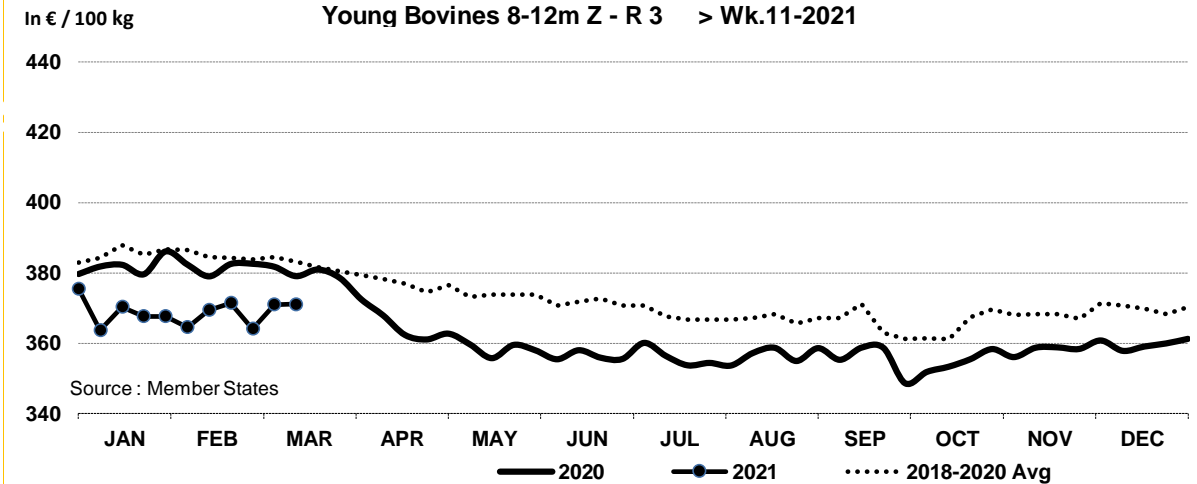


Price in week 11 : **374,54**
% change y/y : **+ 3,9%**

Average price in February 2021 : **372,61**
% change y/y : **+ 2,8%**

Young bovines 8-12m-Z.R3

Young Bovines 8-12m Z - R 3 > Wk.11-2021



Price in week 11 : **371,11**
% change y/y : **- 2,1%**

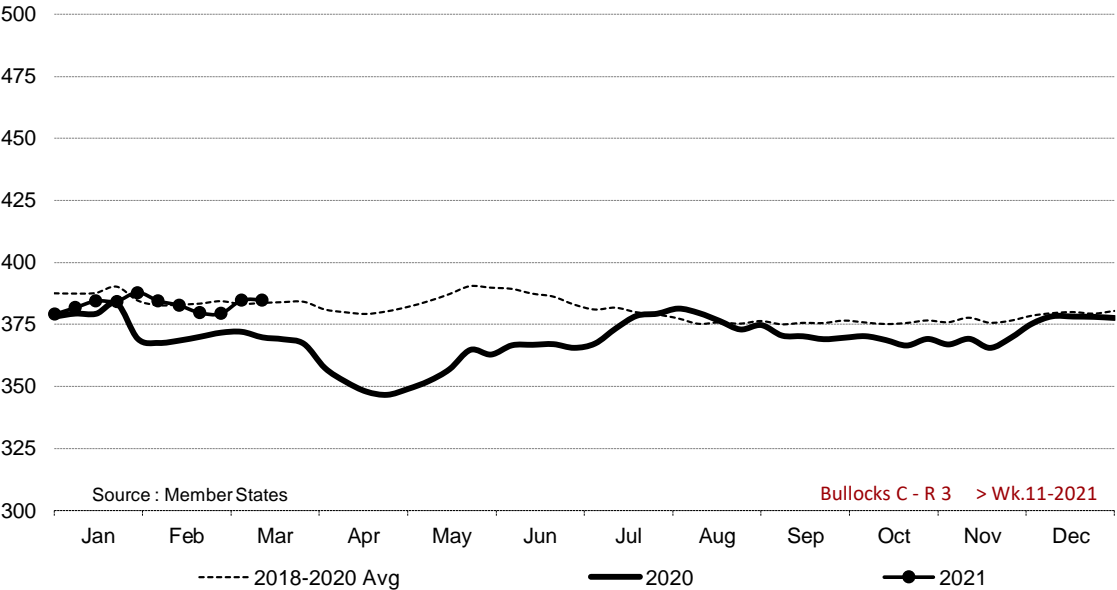
18-02-2021

Average price in February 2021 : **368,35**
% change y/y : **- 3,6%**

PRICES CARCASSES

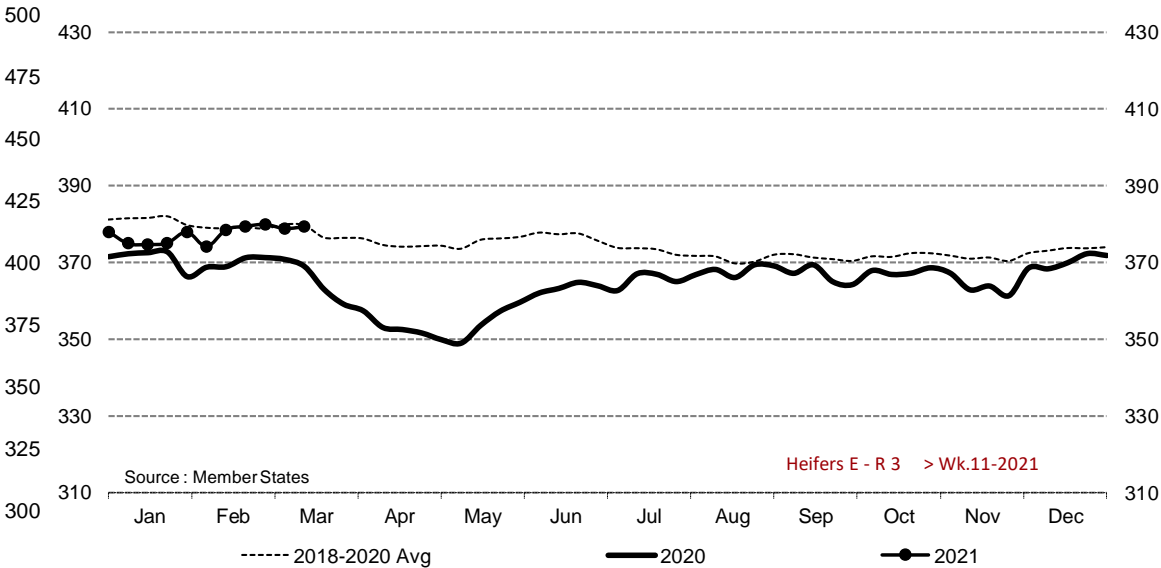
Steers-C.R3

Bullocks C - R 3 > Wk.11-2021



Heifers-E.R3

Heifers E - R 3 > Wk.11-2021



EU exports

EU Exports of Beef and Live Animals

Trade figures (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%	
Total (without UK)	673 029		727 522		701 882		700 245		704 518		
% change			+ 8%		- 4%		- 0%		+ 0.6%		
United Kingdom	477 394		493 227		486 480		440 357		422 521 up to Nov 20		#N/A



European
Commission

EU exports

EU Exports of Beef

Trade figures (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%	
Total (without UK)	453 219		492 379		466 824		475 318		490 890		
% 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

EU exports

EU Exports of Beef

Total Trade in Tonnes Carcase Weight Equivalent

	Jan 19		Jan 20		Jan 21		Evolution 2021 / 20
	Tons	% Total Exports	Tons	% Total Exports	Tons	% Total Exports	
Lebanon	3 626	7.4%	2 875	4.8%	3 739	7.3%	+ 30.0%
Ghana	3 259	6.6%	3 588	6.0%	3 437	6.8%	- 4.2%
Hong Kong	4 113	8.4%	3 869	6.5%	3 099	6.1%	- 19.9%
Israel	5 203	10.6%	4 522	7.6%	2 965	5.8%	- 34.4%
Philippines	2 114	4.3%	3 445	5.8%	2 947	5.8%	- 14.4%
Bosnia-Herz.	3 101	6.3%	2 563	4.3%	2 728	5.4%	+ 6.5%
Ivory Coast	2 145	4.4%	3 238	5.4%	2 664	5.2%	- 17.7%
Switzerland	1 676	3.4%	2 355	4.0%	2 107	4.1%	- 10.5%
Other destinations	23 804	48.5%	33 078	55.6%	27 214	53.5%	- 17.7%
Total (without UK)	49 040		59 532		50 901		- 14.5%

EU imports

EU Exports of Beef

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%	
Total (without UK)	272 094		260 496		287 788		279 208		240 393		
% 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 imports

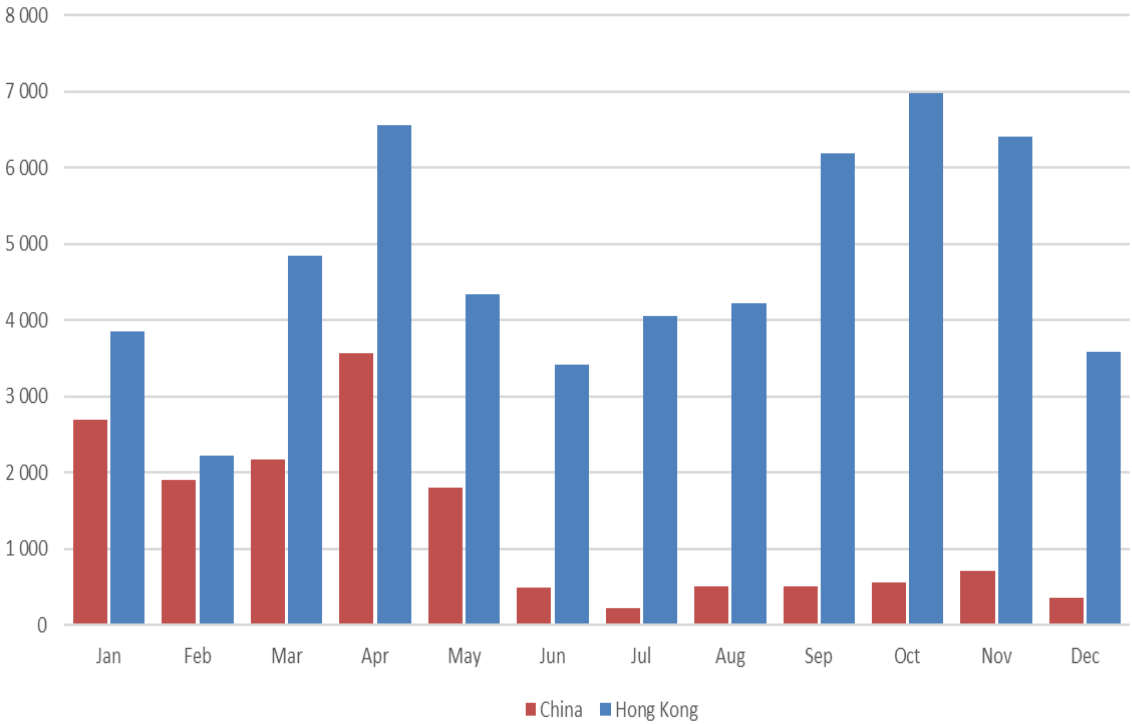
EU Exports of Beef

Total Trade in Tonnes Carcase Weight Equivalent

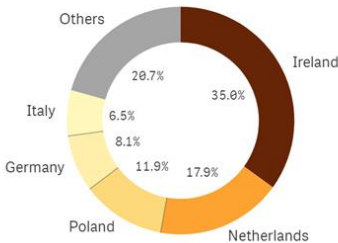
	Jan 19		Jan 20		Jan 21		Evolution 2021 / 20
	Tons	% Total Imports	Tons	% Total Imports	Tons	% Total Imports	
Uruguay	6 695	20.2%	5 012	19.0%	17 625	57.2%	+++
Brazil	8 709	26.3%	7 555	28.7%	5 408	17.6%	- 28.4%
Argentina	8 198	24.7%	6 509	24.7%	3 463	11.2%	- 46.8%
Australia	2 938	8.9%	2 622	9.9%	2 050	6.7%	- 21.8%
USA	4 316	13.0%	2 446	9.3%	979	3.2%	- 60.0%
Switzerland	492	1.5%	444	1.7%	526	1.7%	+ 18.4%
New Zealand	657	2.0%	714	2.7%	281	0.9%	- 60.6%
Canada	135	0.4%	36	0.1%	198	0.6%	+++
Other destinations	1 020	3.1%	1 013	3.8%	276	0.9%	- 72.8%
Total (without UK)	33 160		26 352		30 806		+ 16.9%

Beef export to China and Hong Kong

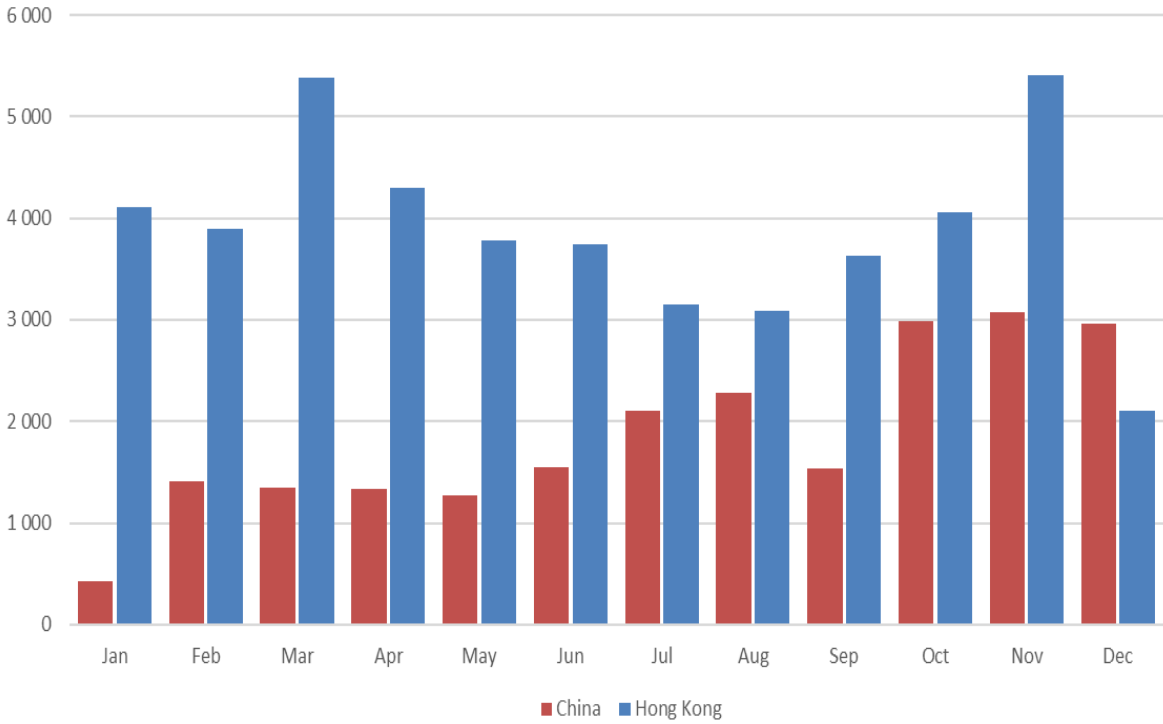
Beef export to CN+HK (CWT) in 2020



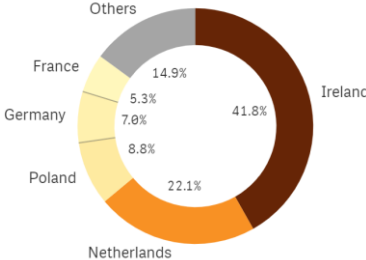
EU - UK, flow: EXPORT, product group: Fresh meat, Frozen Meat, Offals, Preparations, Salted, dried, smoked meat, partner: China, Hong Kong, Marketing Year: 2020, all months



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



Thank you



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