

BEEF & VEAL MARKET SITUATION



Civil Dialogue Group
26 March 2019

LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION TOTAL BOVINE

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2018 2017	BOVINE < 1 Year				%Var 2018 2017	BOVINE 1-2 Year				%Var 2018 2017	BOVINE > 2 Year				%Var 2018 2017
	2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018	
BE	2 503	2 501	2 386	2 398	+0.5%	749	748	700	724	+3.5%	493	492	484	464	-4.1%	1 261	1 261	1 202	1 210	+0.6%
BG	561	570	553	542	-1.9%	109	120	110	108	-1.4%	64	63	57	59	+3.5%	388	387	386	375	-2.9%
CZ	1 366	1 340	1 366	1 365	-0.1%	403	397	407	404	-0.8%	309	295	299	304	+1.7%	654	648	660	657	-0.5%
DK	1 566	1 554	1 558	1 530	-1.8%	538	540	541	534	-1.3%	302	298	294	284	-3.4%	726	715	723	712	-1.5%
DE	12 635	12 467	12 281	11 949	-2.7%	3 836	3 795	3 704	3 584	-3.3%	2 993	2 960	2 904	2 829	-2.6%	5 806	5 712	5 673	5 536	-2.4%
EE	256	248	251	255	+1.7%	70	68	70	70	+0.3%	53	50	49	49	-0.8%	133	130	132	136	+3.3%
IE	6 422	6 613	6 674	6 593	-1.2%	2 026	2 077	2 087	2 000	-4.2%	1 660	1 778	1 792	1 790	-0.1%	2 737	2 759	2 795	2 804	+0.3%
EL	582	554	556	555	-0.2%	154	145	151	150	-0.7%	103	102	101	102	+1.0%	325	306	303	303	idem
ES	6 183	6 318	6 466	6 511	+0.7%	2 325	2 404	2 492	2 494	+0.1%	786	804	822	847	+3.0%	3 072	3 110	3 151	3 170	+0.6%
FR	19 406	19 004	18 975	18 563	-2.2%	5 618	5 138	5 266	5 232	-0.7%	3 461	3 493	3 381	3 180	-5.9%	10 327	10 372	10 328	10 152	-1.7%
HR	441	444	451	414	-8.2%	148	154	156	153	-1.9%	88	89	100	96	-4.0%	205	201	195	165	-15.4%
IT	6 156	6 315	6 350	6 311	-0.6%	1 678	1 745	1 738	1 703	-2.1%	1 379	1 448	1 501	1 538	+2.5%	3 099	3 122	3 111	3 071	-1.3%
CY	59	63	67	71	+5.7%	21	22	23	24	+1.5%	9	10	11	12	+14.0%	29	32	33	35	+6.0%
LV	419	412	406	395	-2.6%	114	113	108	106	-2.1%	76	73	70	65	-6.9%	229	227	228	225	-1.5%
LT	723	695	677	654	-3.5%	185	179	180	173	-4.1%	152	143	135	133	-1.6%	385	373	362	348	-3.9%
LU	201	202	198	194	-1.9%	54	54	50	50	-0.6%	45	44	44	42	-6.1%	102	104	103	103	-0.7%
HU	821	852	870	885	+1.7%	220	239	243	251	+3.3%	180	176	179	182	+1.7%	421	438	448	451	+0.7%
MT	15	14	14	14	-0.4%	4	4	4	4	+1.7%	4	3	3	3	-5.8%	7	7	7	7	+0.7%
NL	4 315	4 294	4 030	3 690	-8.4%	1 707	1 666	1 594	1 510	-5.3%	660	644	575	465	-19.1%	1 948	1 985	1 860	1 715	-7.8%
AT	1 958	1 954	1 943	1 913	-1.6%	624	632	624	618	-0.9%	439	432	439	428	-2.3%	894	890	881	866	-1.7%
PL	5 763	5 970	6 036	6 183	+2.4%	1 617	1 718	1 713	1 709	-0.2%	1 532	1 637	1 669	1 732	+3.8%	2 614	2 615	2 654	2 742	+3.3%
PT	1 606	1 635	1 670	1 632	-2.3%	510	499	515	497	-3.4%	240	267	256	236	-7.7%	856	869	900	899	-0.0%
RO	2 092	2 050	2 011	2 002	-0.5%	475	447	432	431	-0.3%	261	251	248	247	-0.5%	1 357	1 352	1 330	1 324	-0.5%
SI	484	489	480	477	-0.6%	153	155	153	153	-0.1%	129	131	128	128	-0.6%	202	203	198	196	-1.0%
SK	457	446	440	440	+0.1%	130	130	125	123	-1.1%	91	84	84	83	-1.4%	236	231	231	234	+1.2%
FI	903	887	875	859	-1.7%	308	302	299	296	-1.0%	221	218	213	210	-1.6%	374	367	363	354	-2.4%
SE	1 428	1 436	1 449	1 435	-0.9%	467	468	474	468	-1.3%	342	344	342	343	+0.3%	619	624	633	625	-1.2%
UK	9 816	9 806	9 787	9 676	-1.1%	2 967	2 952	2 956	2 925	-1.0%	2 372	2 435	2 413	2 379	-1.4%	4 477	4 419	4 417	4 373	-1.0%
EU	89 138	89 134	88 819	87 508	-1.5%	27 209	26 911	26 916	26 494	-1.6%	18 445	18 764	18 594	18 229	-2.0%	43 484	43 458	43 306	42 786	-1.2%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2017 AND 2018

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LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION

COWS

Dec 1000 Hd	TOTAL COWS				%Var 2018 2017	DAIRY COWS				%Var 2018 2017	OTHER COWS				%Var 2018 2017
	2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018	
BE	974	988	938	942	+0.4%	529	531	519	529	+1.9%	445	457	419	412	-1.6%
BG	359	365	357	351	-1.7%	283	279	261	245	-6.2%	76	86	97	107	+10.5%
CZ	566	561	571	570	-0.2%	369	367	365	359	-1.9%	197	193	206	212	+2.8%
DK	664	657	664	655	-1.4%	570	565	575	570	-0.9%	94	92	89	85	-4.5%
DE	4 966	4 887	4 859	4 751	-2.2%	4 285	4 218	4 199	4 101	-2.3%	681	670	660	650	-1.5%
EE	116	114	115	119	+3.6%	91	86	86	85	-1.4%	25	28	29	34	+18.8%
IE	2 293	2 337	2 362	2 351	-0.4%	1 240	1 295	1 343	1 369	+1.9%	1 053	1 042	1 018	982	-3.5%
EL	274	241	262	255	-2.7%	111	106	97	102	+5.2%	163	135	165	154	-6.7%
ES	2 763	2 785	2 822	2 819	-0.1%	844	834	823	817	-0.8%	1 919	1 950	1 998	2 002	+0.2%
FR	7 872	7 856	7 750	7 642	-1.4%	3 661	3 630	3 595	3 550	-1.2%	4 211	4 225	4 156	4 092	-1.5%
HR	172	167	161	146	-9.3%	152	147	139	136	-2.2%	20	20	22	10	-54.5%
IT	2 386	2 365	2 338	2 263	-3.2%	2 057	2 060	2 040	1 939	-4.9%	329	305	298	324	+8.7%
CY	26	29	30	32	+5.4%	26	28	30	31	+3.0%	0	0	0	0	-61.5%
LV	201	199	199	196	-1.4%	162	154	150	144	-3.9%	39	45	49	52	+6.2%
LT	343	333	323	312	-3.3%	301	286	273	256	-6.1%	43	47	50	56	+12.0%
LU	77	80	78	78	-0.0%	49	52	52	53	+1.7%	28	28	26	25	-3.5%
HU	368	383	395	403	+2.0%	250	244	244	239	-2.0%	117	138	151	164	+8.6%
MT	7	7	6	6	+1.4%	6	7	6	6	+1.5%	0	0	0	0	idem
NL	1 802	1 864	1 723	1 594	-7.5%	1 717	1 794	1 665	1 552	-6.8%	85	70	58	42	-27.6%
AT	758	757	750	733	-2.3%	534	540	543	533	-1.9%	224	217	207	200	-3.2%
PL	2 303	2 304	2 341	2 417	+3.3%	2 134	2 130	2 153	2 214	+2.8%	169	174	188	203	+8.3%
PT	719	724	728	723	-0.7%	243	239	239	235	-1.3%	476	485	490	487	-0.5%
RO	1 207	1 204	1 187	1 181	-0.5%	1 191	1 193	1 175	1 169	-0.5%	17	12	12	12	+1.7%
SI	170	171	169	166	-1.5%	113	108	109	102	-6.7%	57	64	60	65	+8.0%
SK	200	194	195	195	+0.3%	139	133	130	128	-1.4%	60	62	65	67	+3.6%
FI	339	333	329	322	-2.0%	282	275	271	264	-2.6%	57	57	58	58	+0.7%
SE	513	514	522	514	-1.6%	337	326	323	313	-3.2%	176	188	199	201	+0.9%
UK	3 469	3 451	3 443	3 405	-1.1%	1 918	1 898	1 904	1 895	-0.5%	1 551	1 554	1 540	1 510	-1.9%
EU	35 908	35 868	35 618	35 143	-1.3%	23 594	23 525	23 311	22 937	-1.6%	12 313	12 342	12 308	12 207	-0.8%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2017 AND 2018

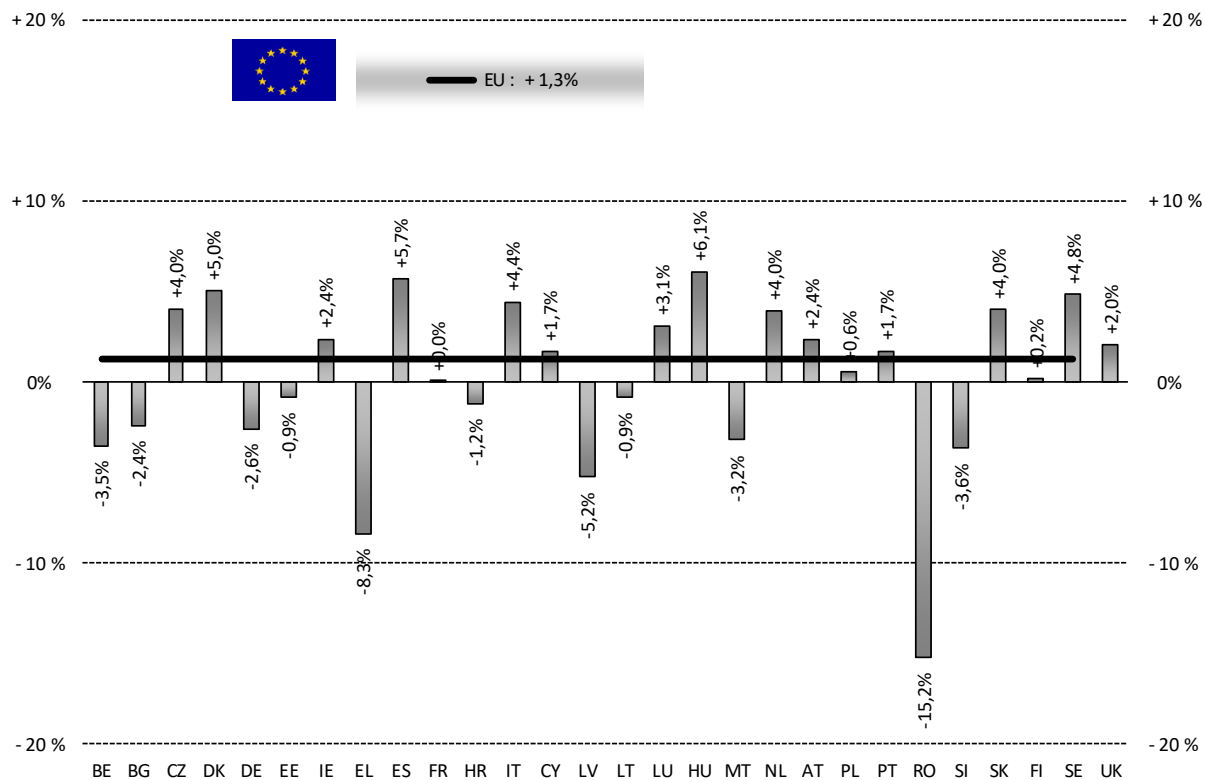
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PRODUCTION

% EVOLUTION HEADS

HEADS	Jan-Dec 18/17	
	EU15	EU28
Bull	+0,5%	+0,5%
Bullock	-2,0%	-2,1%
Cow	+1,7%	+1,1%
Heifer	+7,2%	+6,6%
Calve	+1,1%	+0,9%
Young cattle	-2,1%	-2,4%
Meat of bovine animals	+1,6%	+1,3%

Estimates for last month of period



Source : EStat - Newcronos

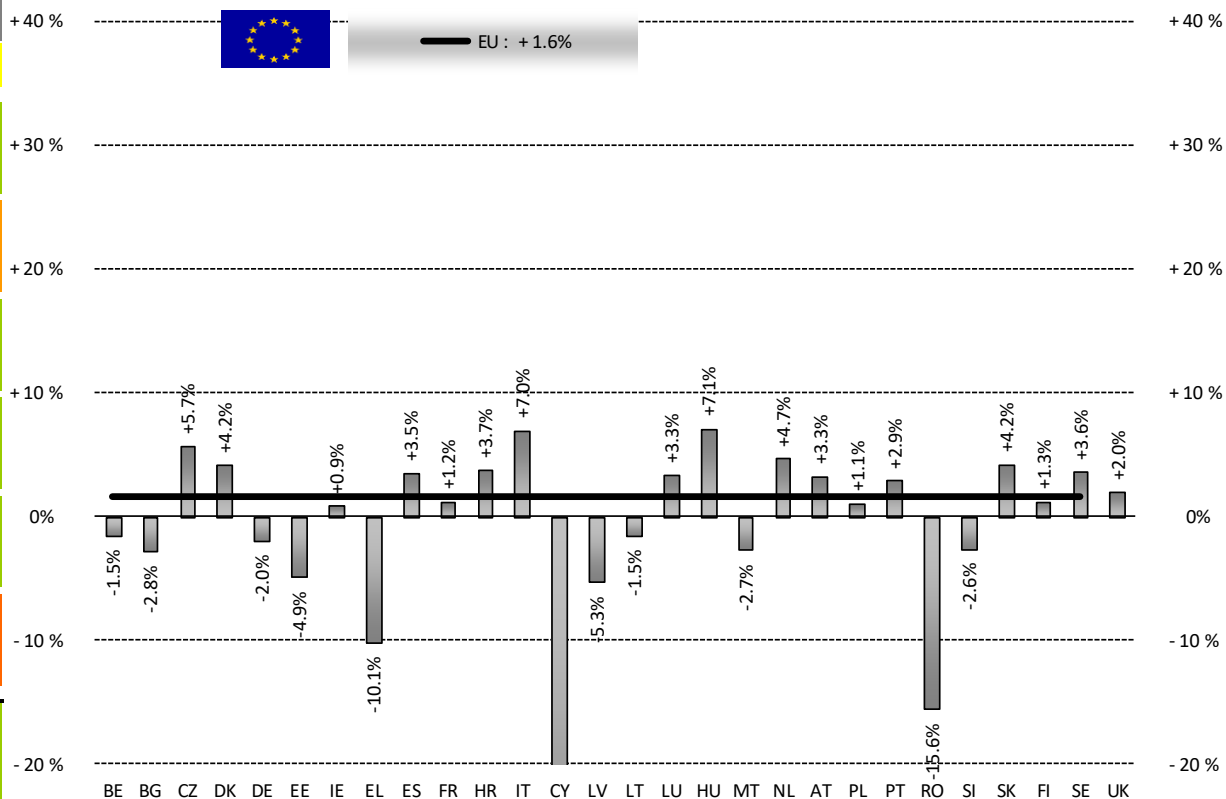
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PRODUCTION

% EVOLUTION TONNES

TONNES	Jan-Dec 18/17	
	EU15	EU28
Bull	+0.2%	+0.5%
Bullock	-2.1%	-2.2%
Cow	+2.7%	+2.0%
Heifer	+8.2%	+7.7%
Calve	+1.2%	+1.1%
Young cattle	-4.8%	-5.7%
Meat of bovine animals	+1.9%	+1.6%

Estimates for last month of period

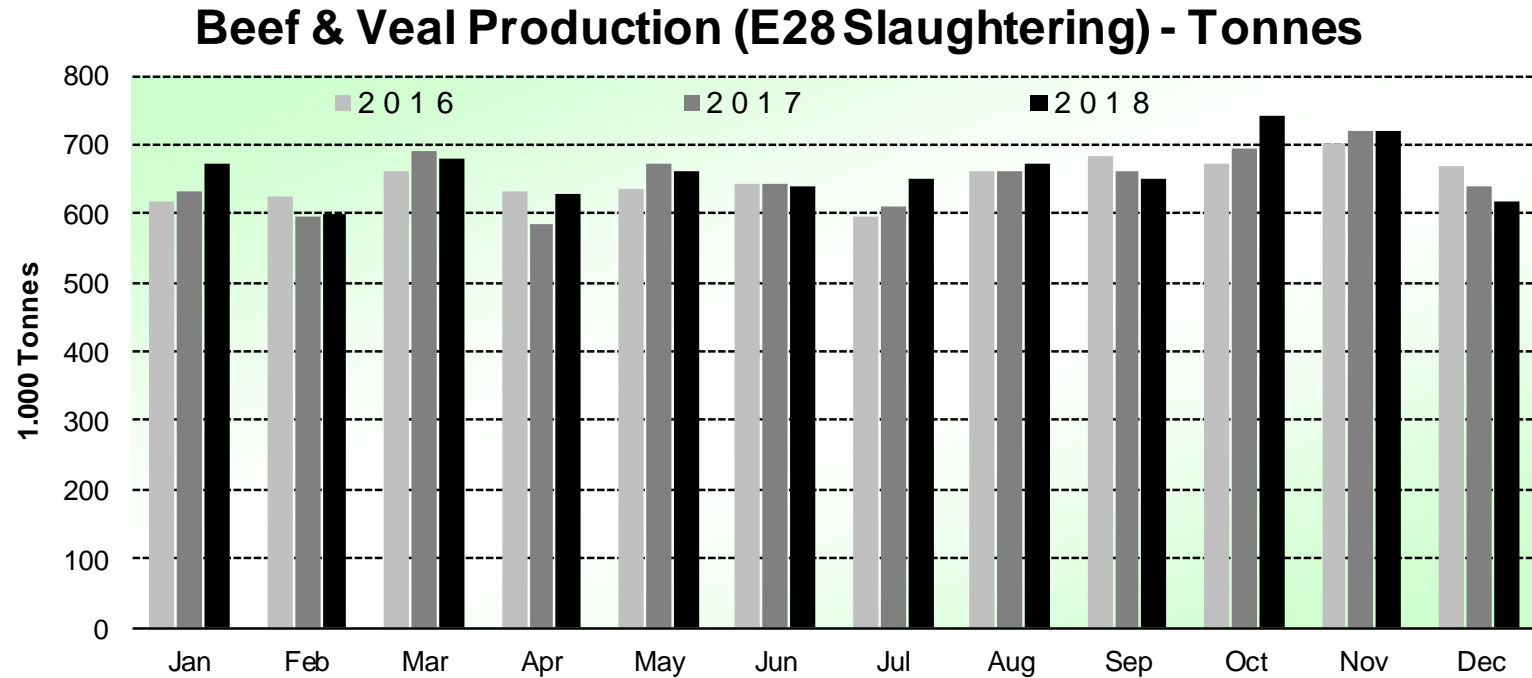


Source : EStat - Newcronos

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PRODUCTION

HISTORIC TONNES

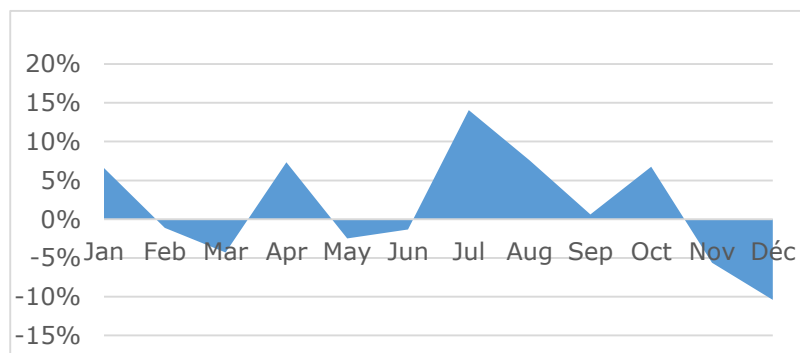


Source : EStat-Newcronos

PRODUCTION

Year To Year monthly increase of cow slaughtering (2018/2017)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Déc
BE	6%	-1%	-11%	4%	-5%	-7%	7%	7%	-3%	7%	2%	-7%
CZ	0%	-2%	-6%	10%	5%	0%	9%	9%	11%	12%	13%	-2%
DK	9%	5%	-1%	17%	7%	7%	23%	18%	5%	2%	0%	-5%
DE	4%	-9%	-4%	8%	-3%	0%	23%	9%	-3%	5%	-13%	-18%
EE	1%	-5%	-11%	9%	2%	-1%	15%	7%	1%	6%	0%	-7%
IE	3%	2%	-2%	27%	-14%	0%	22%	15%	15%	17%	1%	-2%
FR	7%	5%	0%	10%	0%	-3%	9%	2%	-4%	8%	-3%	-5%
LV	19%	7%	-3%	5%	-4%	6%	10%	9%	-10%	-1%	-4%	-15%
LT	1%	-9%	-6%	2%	-3%	12%	2%	7%	-5%	2%	8%	5%
LU	10%	10%	3%	49%	1%	31%	22%	15%	10%	5%	14%	1%
NL	3%	-16%	-23%	-24%	-13%	-3%	18%	15%	21%	11%	-17%	-34%
AT	18%	4%	1%	10%	-6%	-6%	-1%	16%	-8%	5%	-4%	-19%
PL	11%	5%	3%	2%	1%	0%	3%	8%	-4%	0%	-8%	-10%
FI	-3%	-8%	-6%	5%	1%	-5%	10%	13%	4%	5%	-6%	-4%
SE	13%	9%	4%	33%	9%	0%	38%	12%	5%	15%	3%	1%
UK	10%	4%	1%	24%	4%	1%	19%	2%	5%	5%	-3%	-1%
TOTAL	7%	-1%	-4%	7%	-2%	-1%	14%	8%	1%	7%	-6%	-10%



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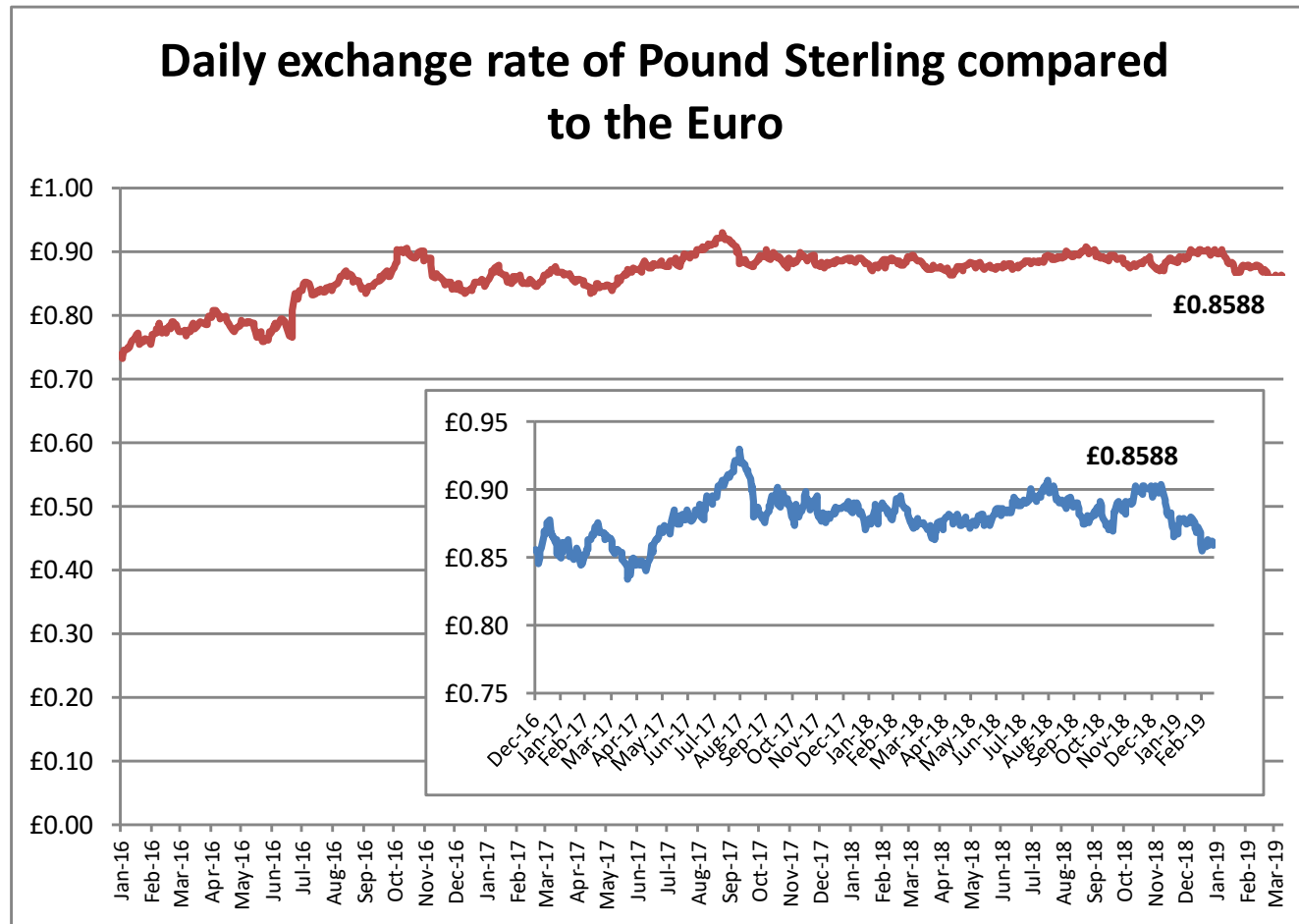
PRICES CARCASSES

Dashboard

EU Prices week		11	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	371,5	€/100 kg	- 0,1%	- 0,7%	- 3,6%
	Young Bovines (Z)	371,1		- 0,1%	- 0,2%	- 0,1%
	Young Bulls (A)	370,0		- 0,4%	- 1,0%	- 4,6%
	Steers (C)	386,1		- 0,3%	- 0,5%	- 3,4%
	Cows (D)	284,8		+ 0,7%	+ 1,9%	- 5,5%
	Heifers (E)	379,6		+ 0,2%	+ 0,1%	- 2,7%
Live Animals	Male Calves Dairy Type	84,76	€/head	+ 2,3%	- 11,8%	- 12,4%
	Male Calves Beef Type	199,7		- 0,7%	- 10,5%	- 0,7%
	Young Store Cattle	2,43	€/kg	+ 0,7%	- 1,8%	- 2,1%
	Yearling Male Store Cattle	2,24		- 1,6%	- 4,0%	- 4,5%
	Yearling Female Store Cattle	2,36		- 0,1%	- 0,5%	- 1,1%
	Calves slaughtered <8M	497,8	€/100	- 0,6%	- 8,6%	- 8,6%

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

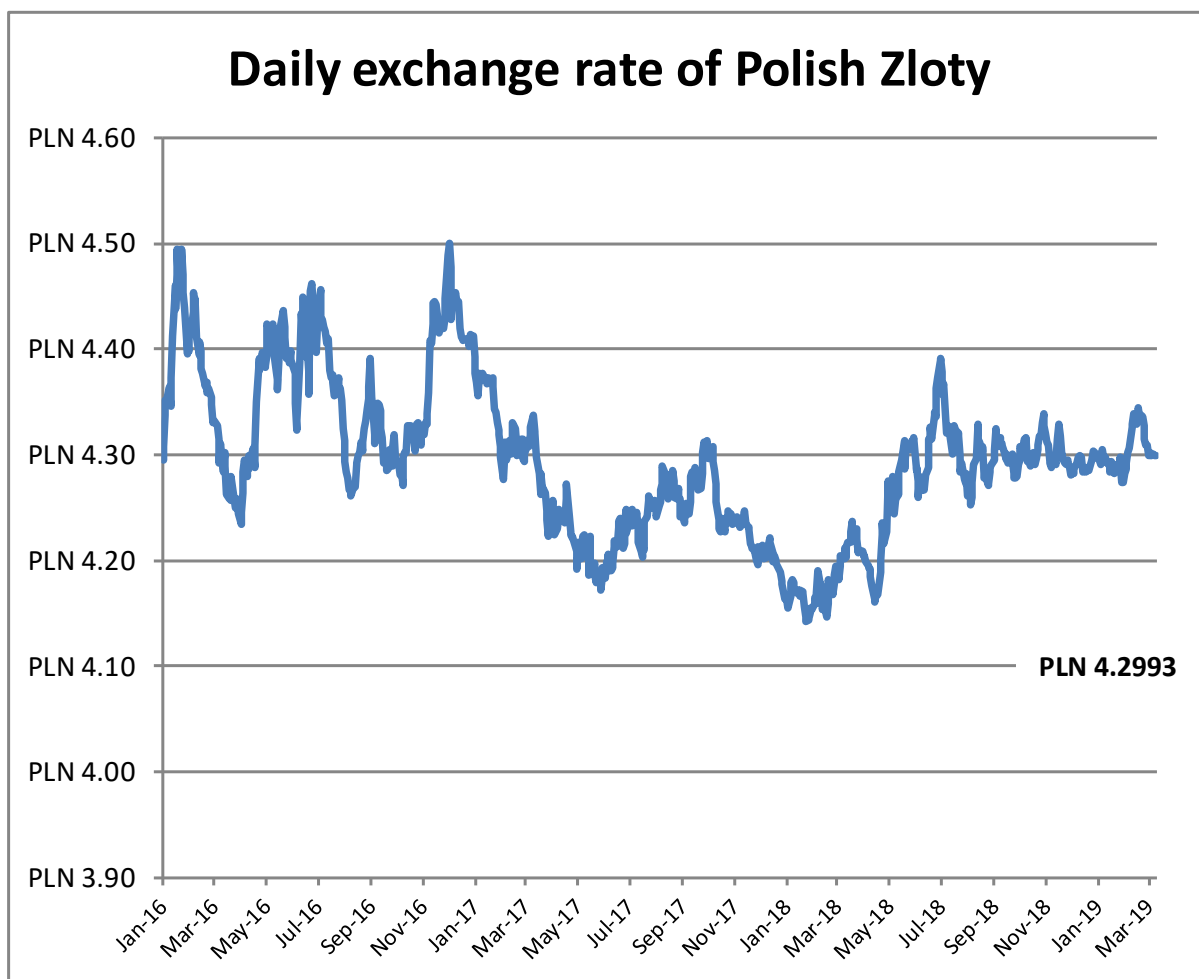
EXCHANGE RATE INDEX / Euro



Source : ECB

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EXCHANGE RATE INDEX / Euro

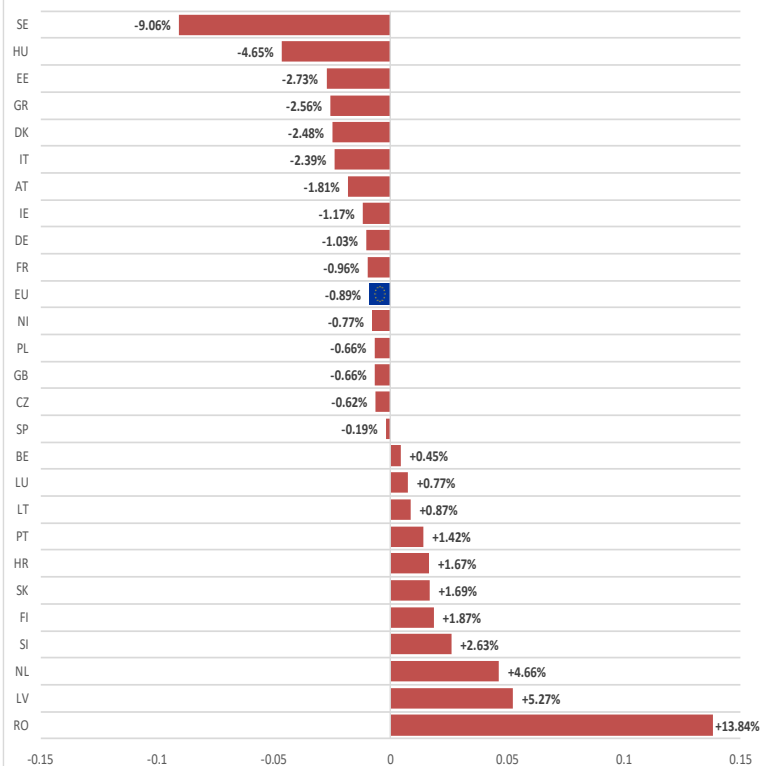


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PRICES CARCASSES

EU EVOLUTION A/C/Z.R3

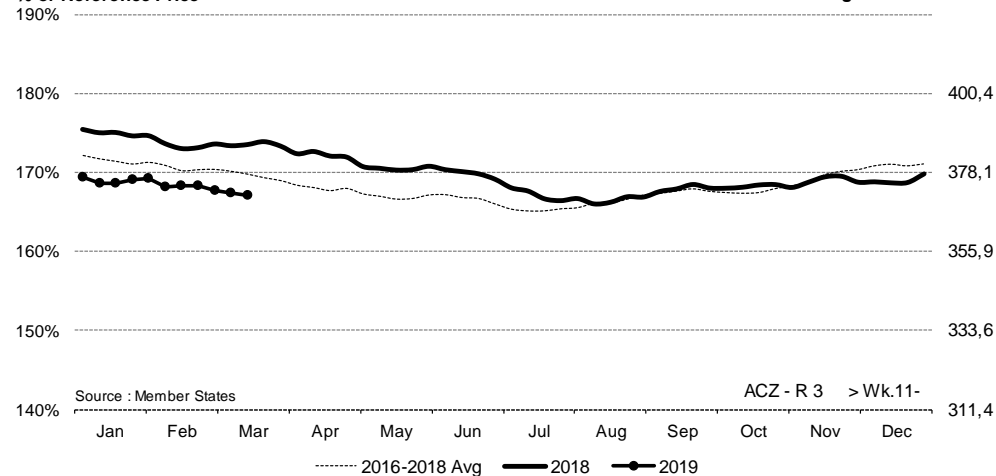
EU ACZ R3 Price Comparison between average monthly price March 2018 - February 2019 compared to March 2017 - February 2018



ACZ - R 3 > Wk.11-2019

% of Reference Price

€/100 kg cwe



Price in week 11 : **371,57**

% change y/y : **- 3,7%**

% Ref. Price in wk 11 : **167,1%**

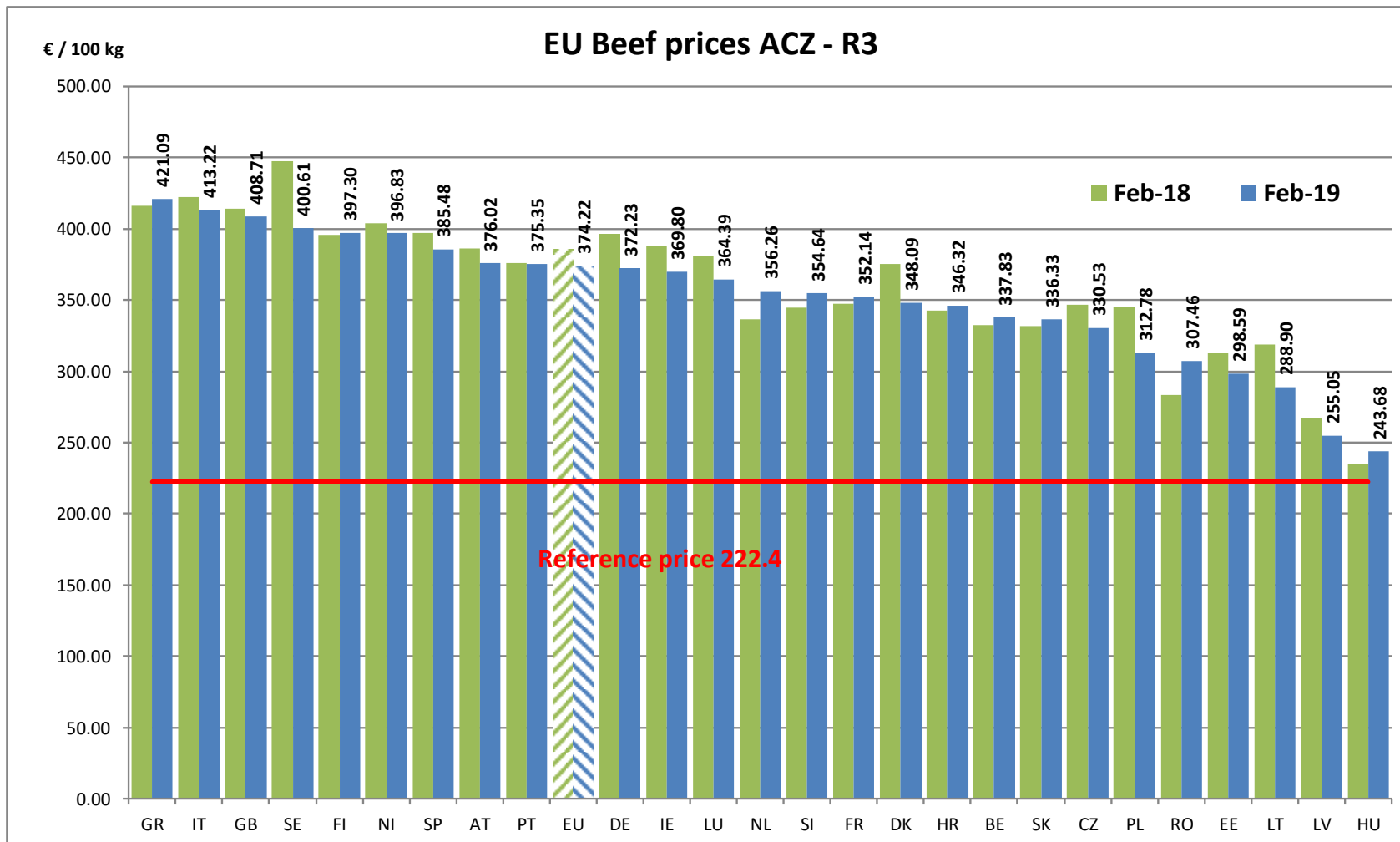
Average price in février 2019 : **374,24**

% change y/y : **- 3,0%**

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PRICES CARCASSES

EU EVOLUTION
A/C/Z.R3

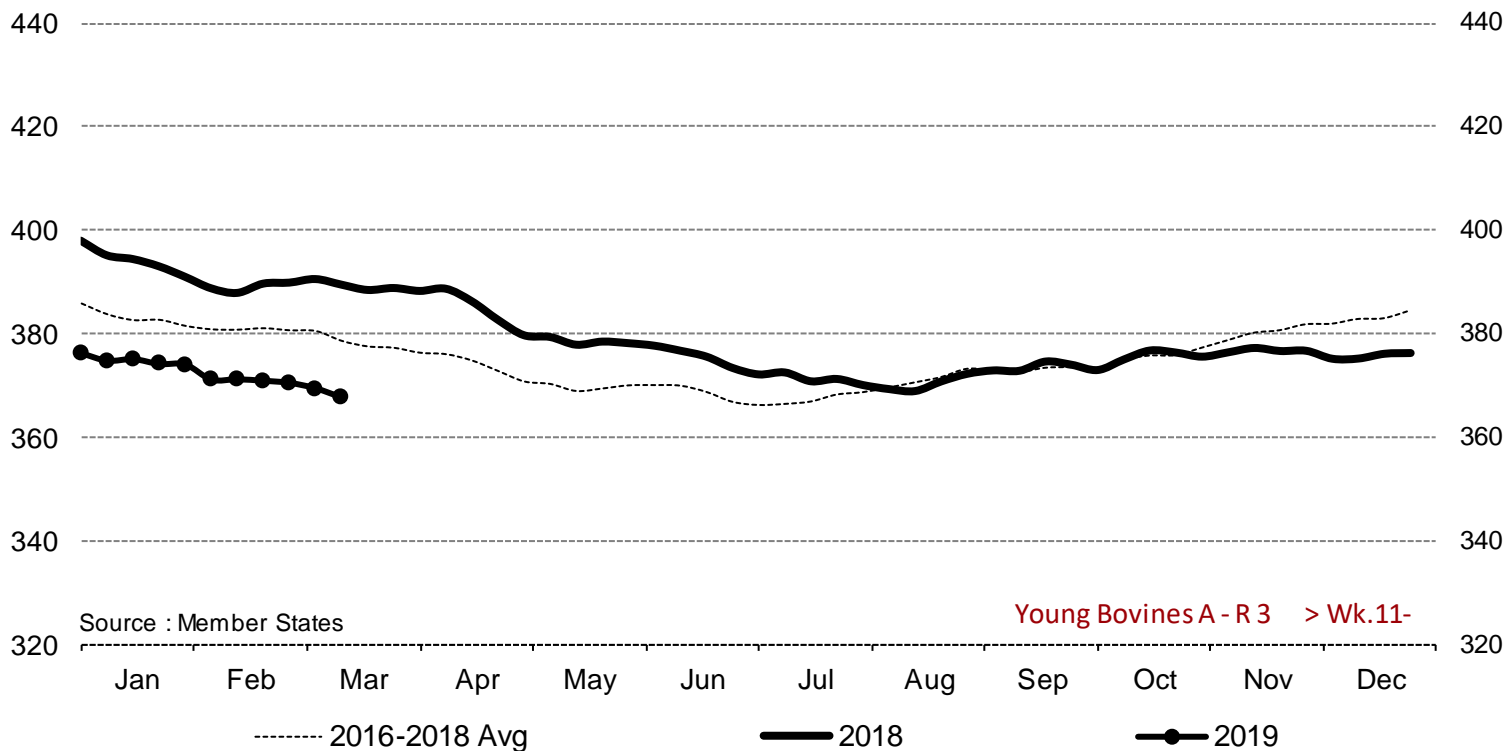


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PRICES CARCASSES

EU EVOLUTION YOUNG BULL - A.R3

Young Bovines A - R 3 > Wk.11-2019



Price in week 11 : **367,57**
% change y/y : **- 5,6%**

Average price in février 2019 : **371,20**
% change y/y : **- 4,6%**

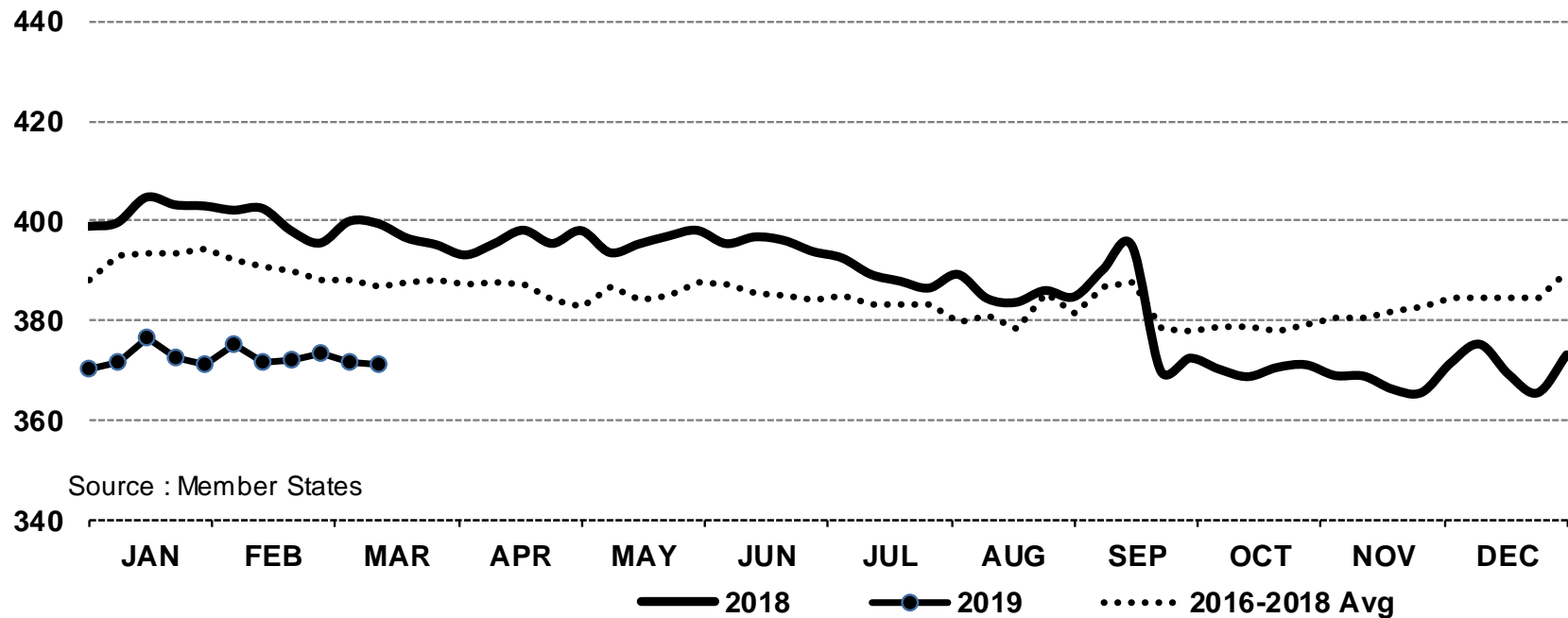
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PRICES CARCASSES

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

In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.11-2019



Price in week 11 : **371,17**

#####

Average price in février 2019 : **372,96**

% change y/y : **-7,1%**

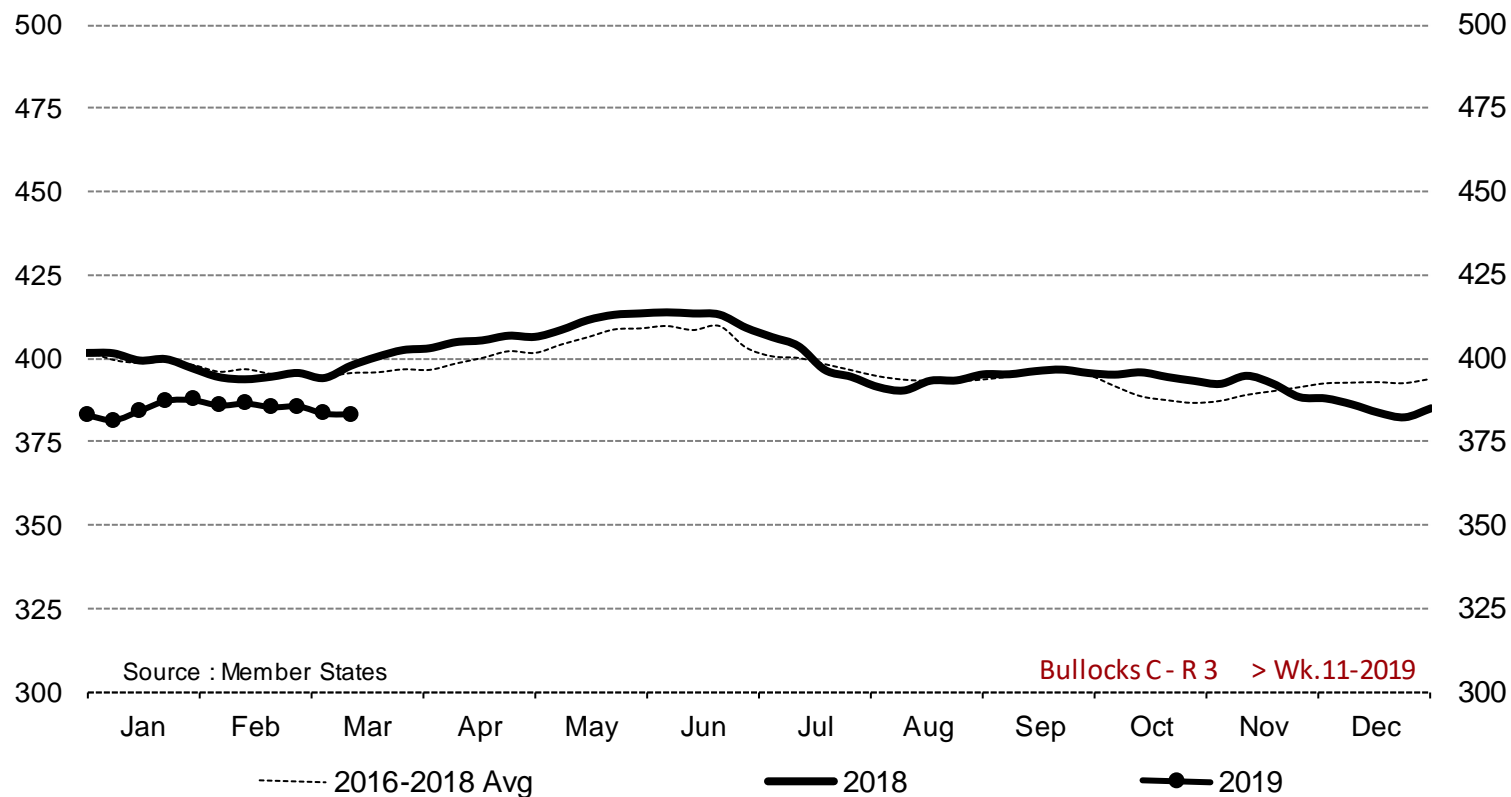
% change y/y : **-6,9%**

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PRICES CARCASSES

E.U. EVOLUTION STEER - C.R3

Bullocks C - R 3 > Wk.11-2019



Price in week 11 : **383,11**
% change y/y : **- 3,7%**

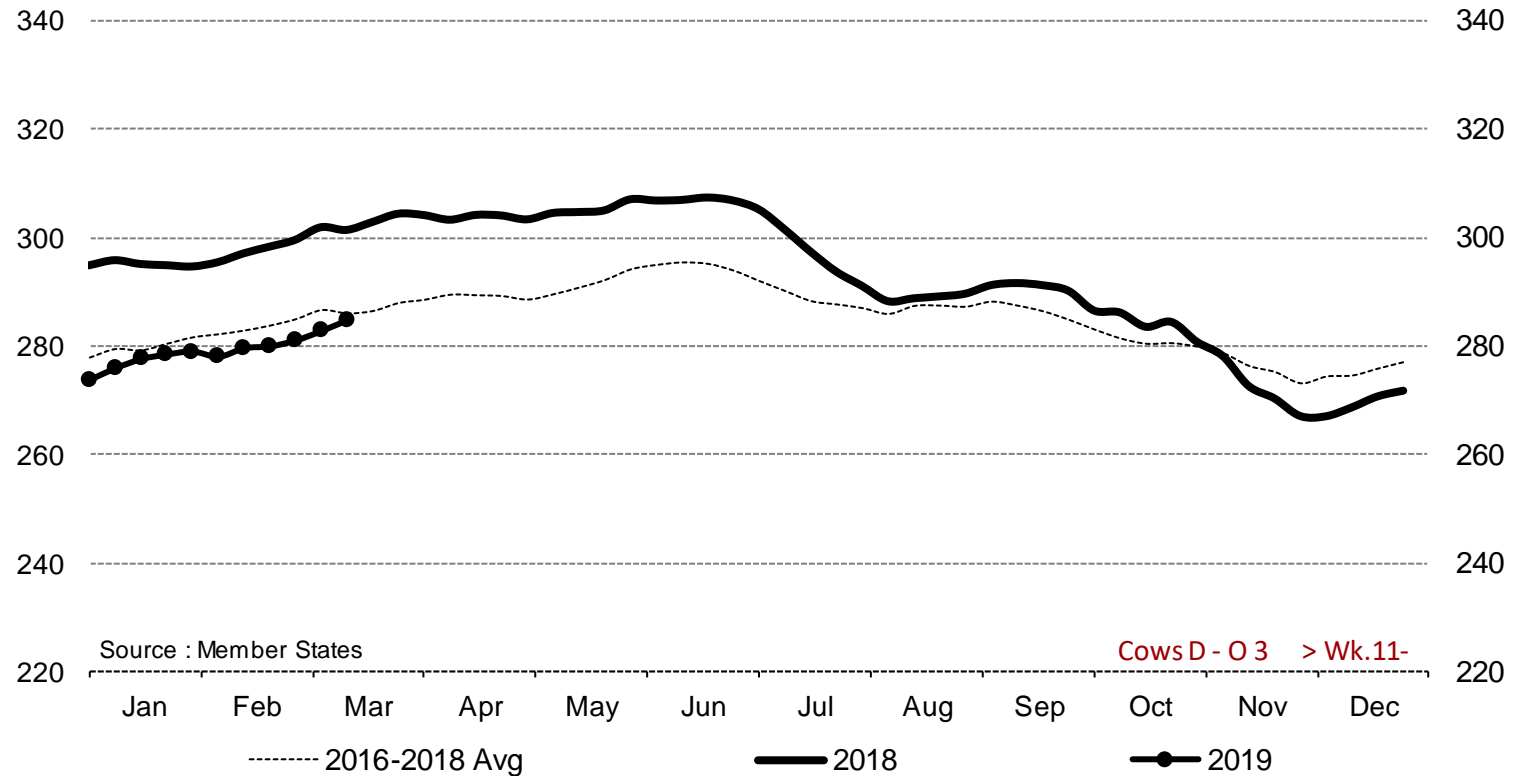
Average price in février 2019 : **386,01**
% change y/y : **- 2,3%**

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PRICES CARCASSES

E.U. EVOLUTION
COW - D.O3

Cows D - O 3 > Wk.11-2019



Price in week 11 : **284,87**
% change y/y : **- 5,5%**

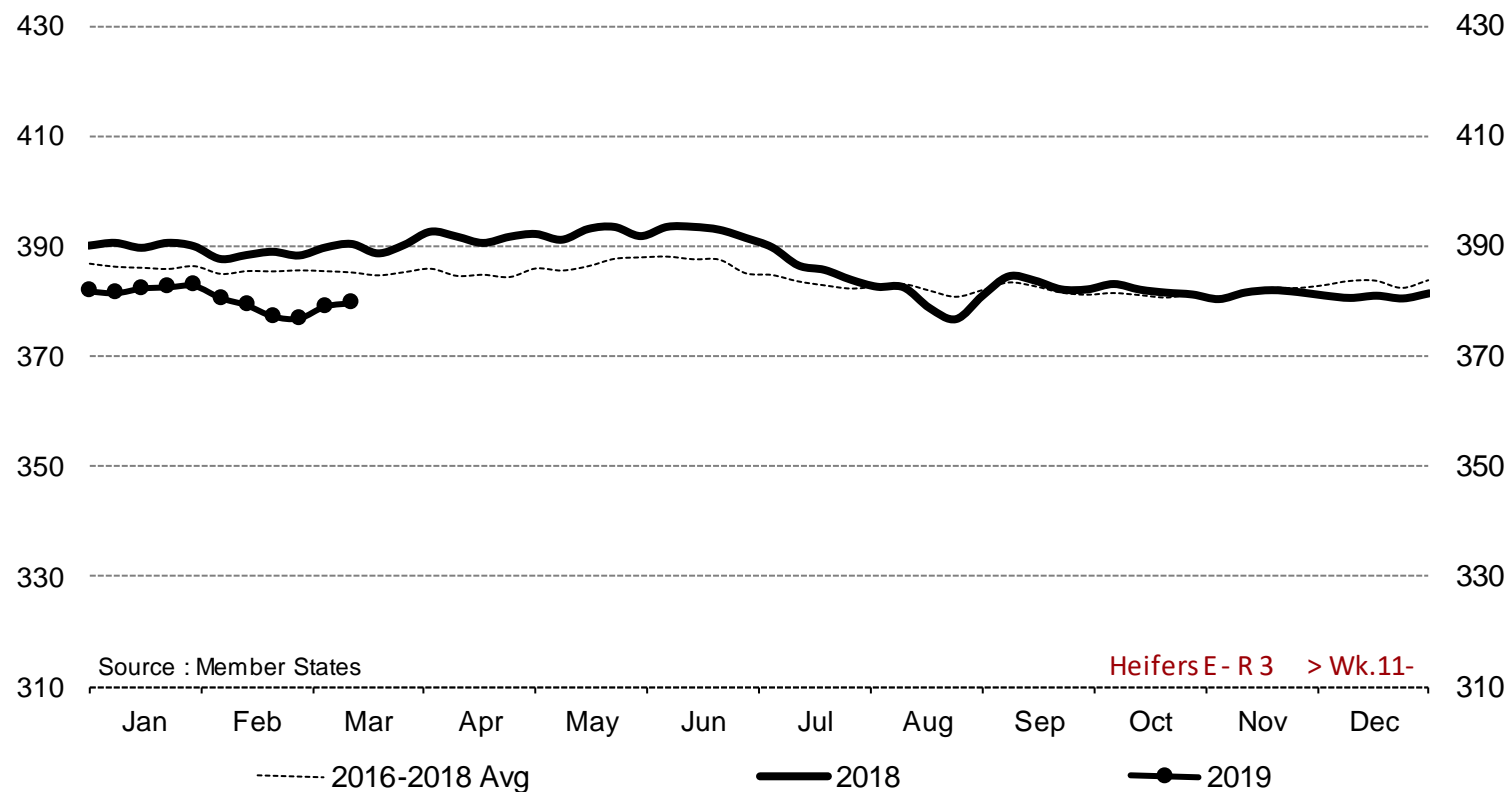
Average price in février 2019 : **279,52**
% change y/y : **- 5,9%**

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PRICES CARCASSES

EU EVOLUTION HEIFER - E.R3

Heifers E - R 3 > Wk.11-2019



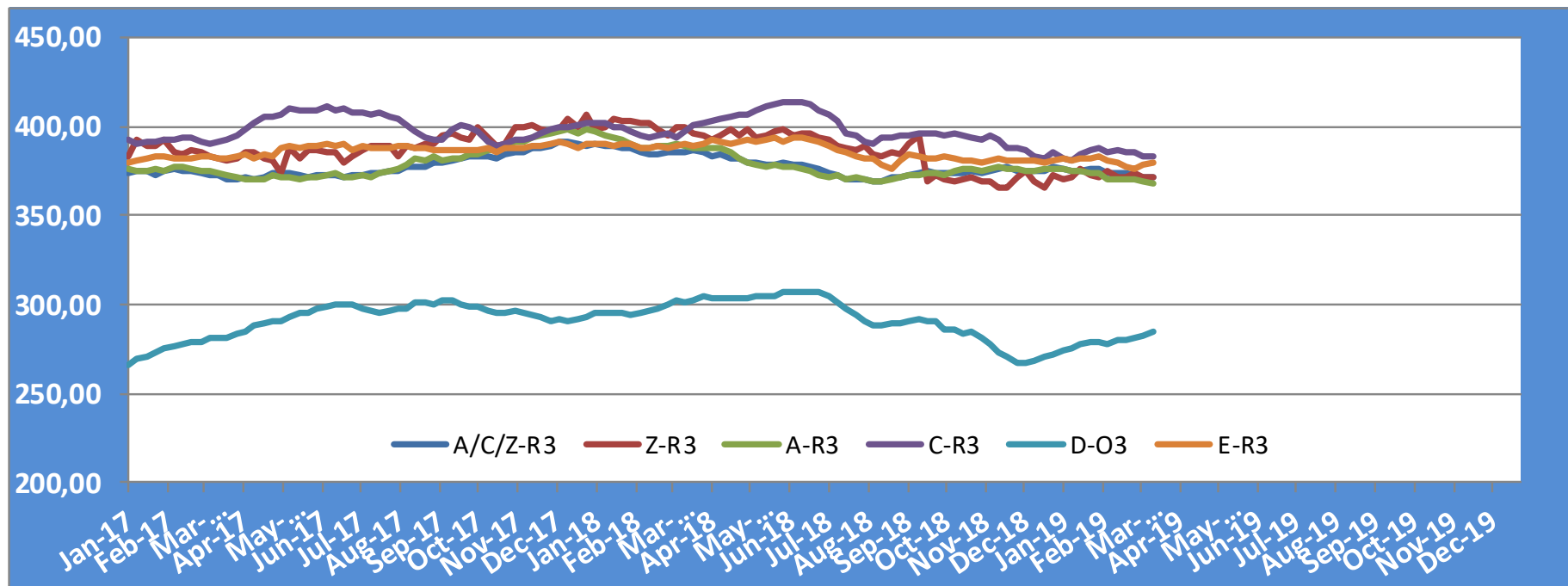
Price in week 11 : **379,67**
% change y/y : **- 2,7%**

Average price in février 2019 : **379,15**
% change y/y : **- 2,4%**

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PRICES CARCASSES

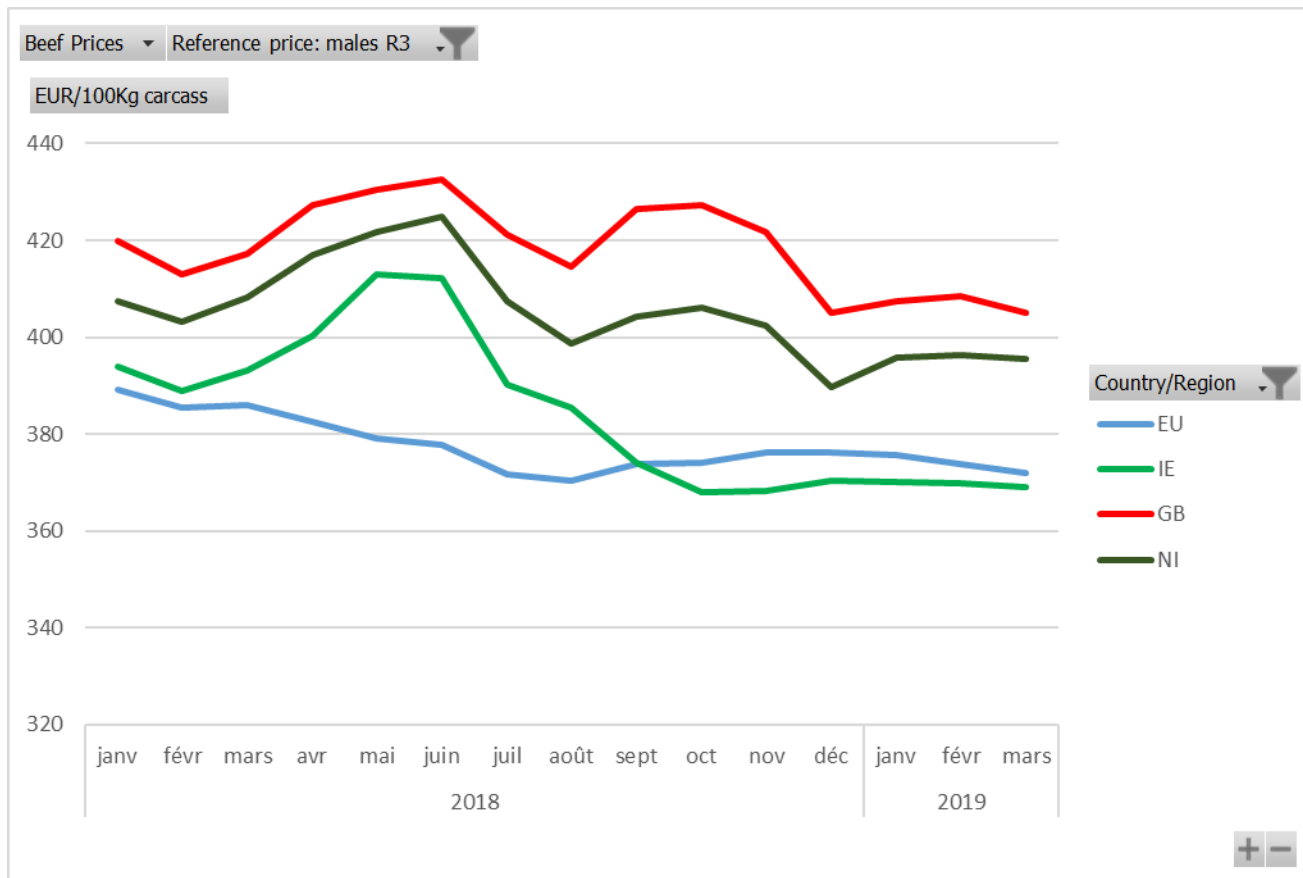
EU EVOLUTION All CAT GLOBAL VIEW



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PRICES CARCASSES

IE, UK and EU

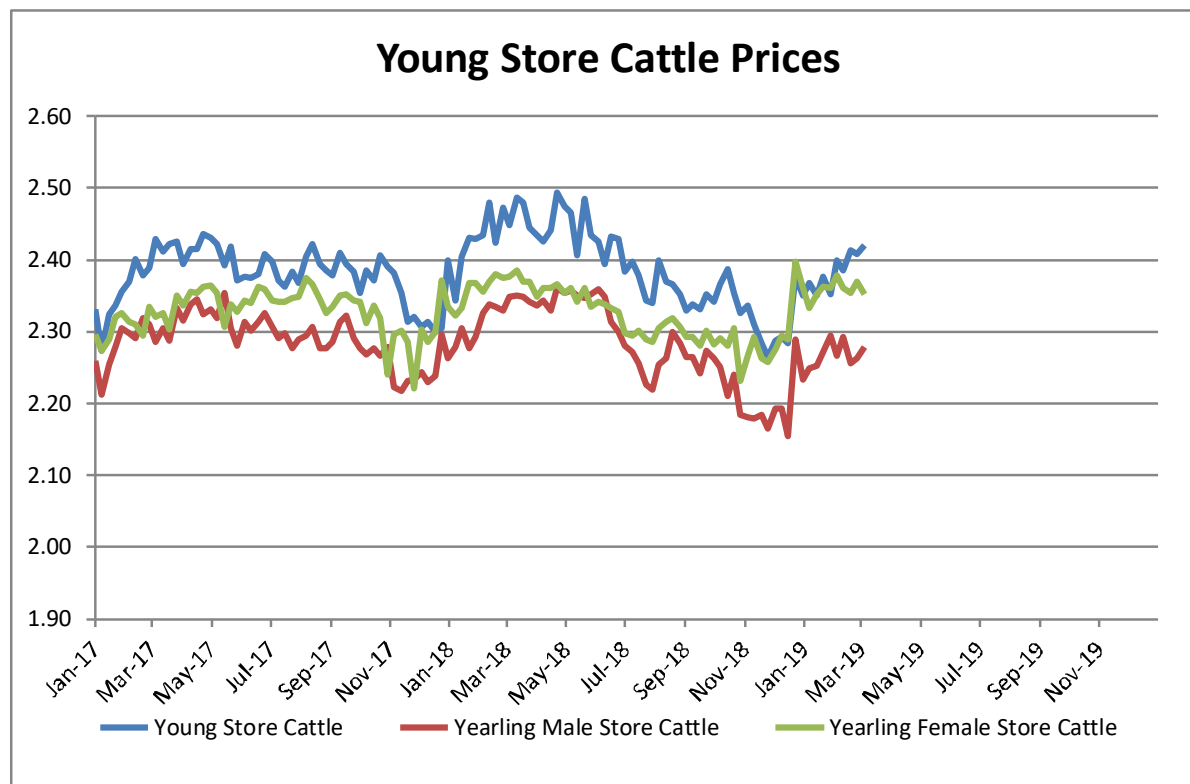


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PRICES LIVE BOVINES

EU EVOLUTION STORE CATTLE

Store cattle (€/100 kg live weight)



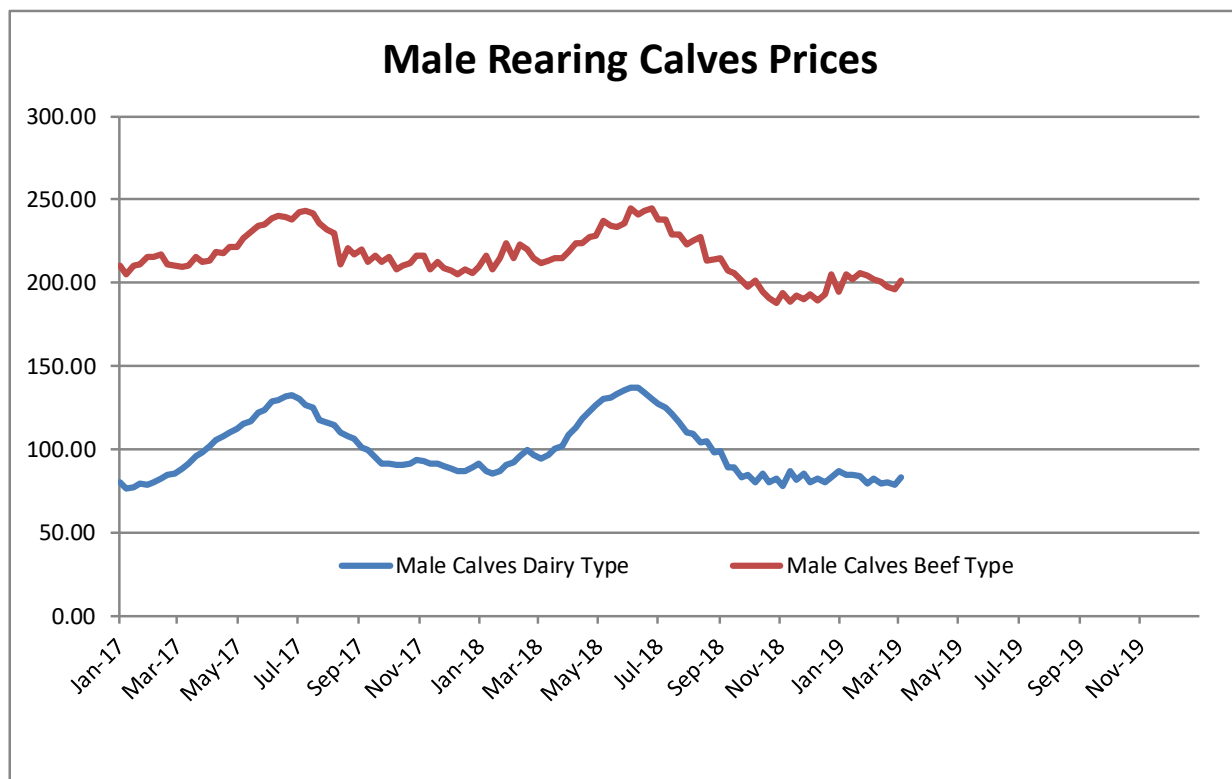
Young Store Cattle Price in	Week 10	2.42	Yearling Male Store Cattle Price	2.28
	Change y/y	-1.18%	Change y/y	-2.95%
Yearling Female Store Cattle Price		2.35		
	Change y/y	-1.06%		

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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 10 201.12
Change y/y -4.98%

Male Rearing Calves Dairy type

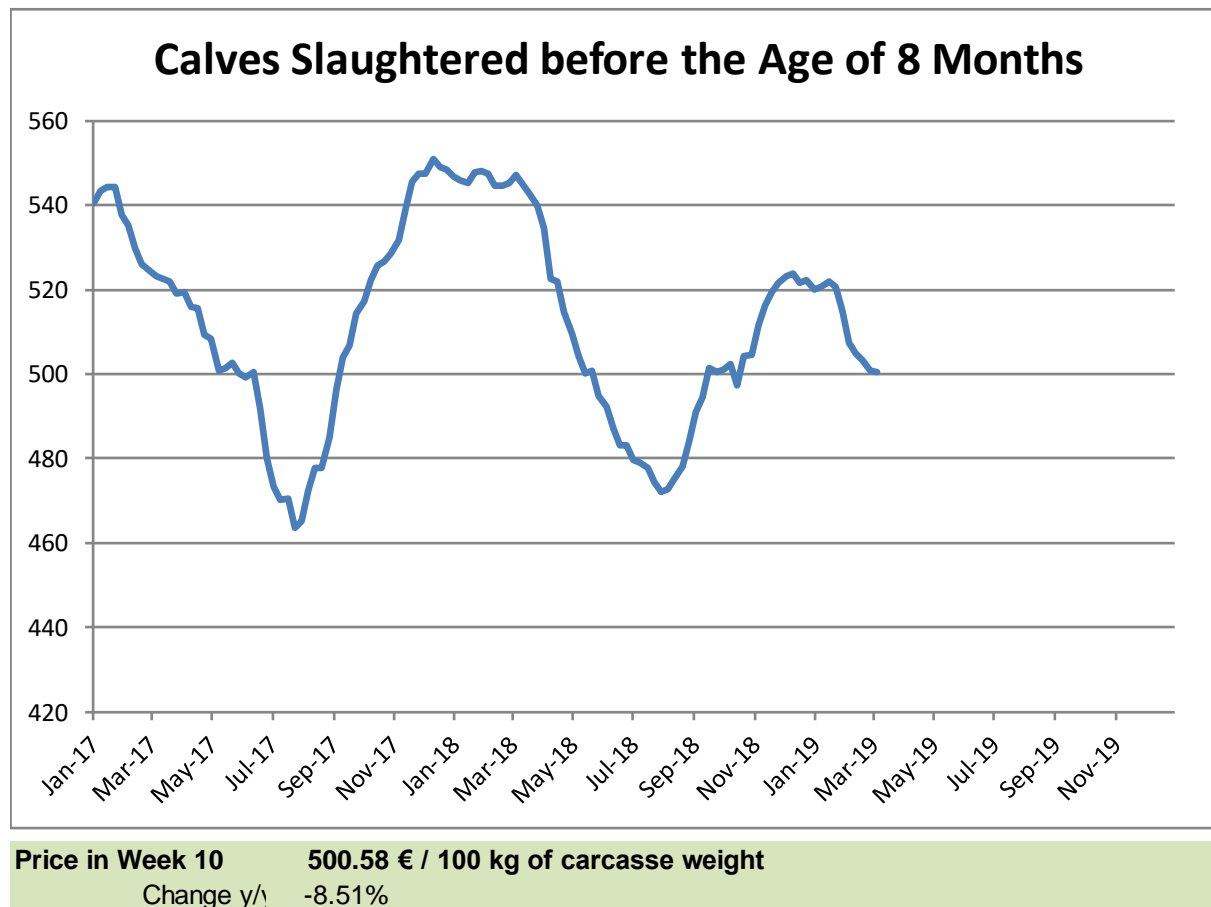
Price in Week 10 82.86
Change y/y -12.35%

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PRICES LIVE BOVINES

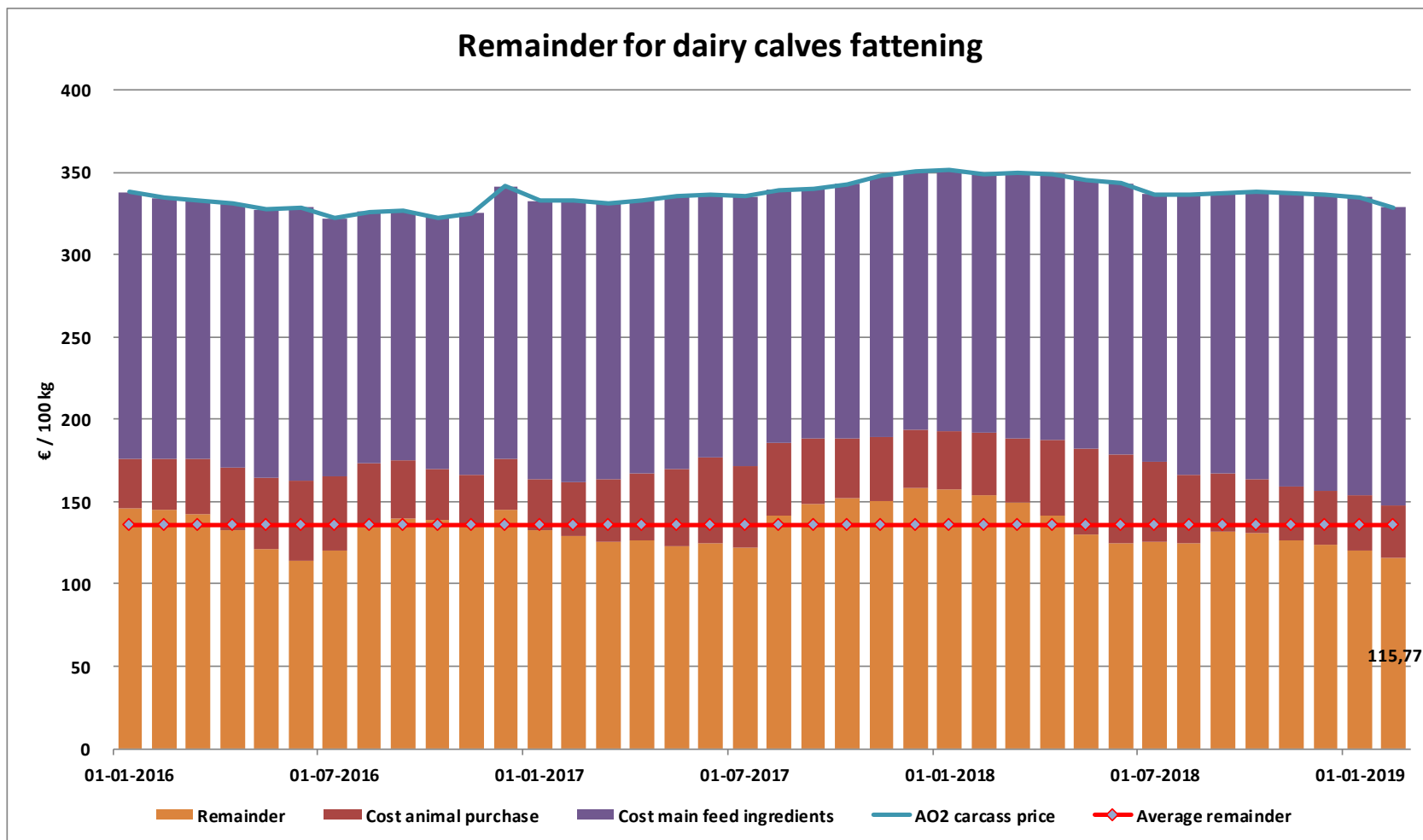
EU EVOLUTION Butcher Calves

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



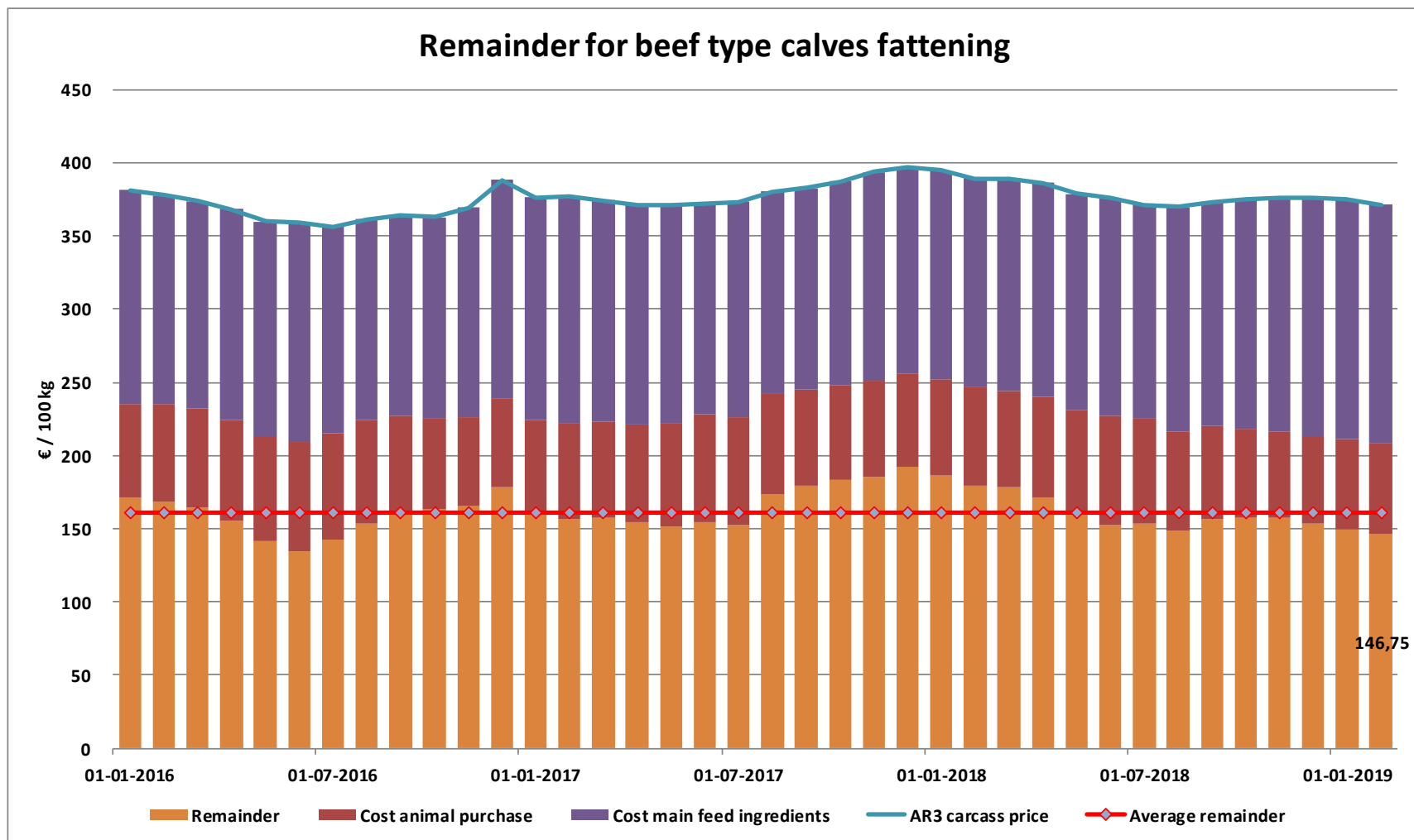
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REMAINDERS



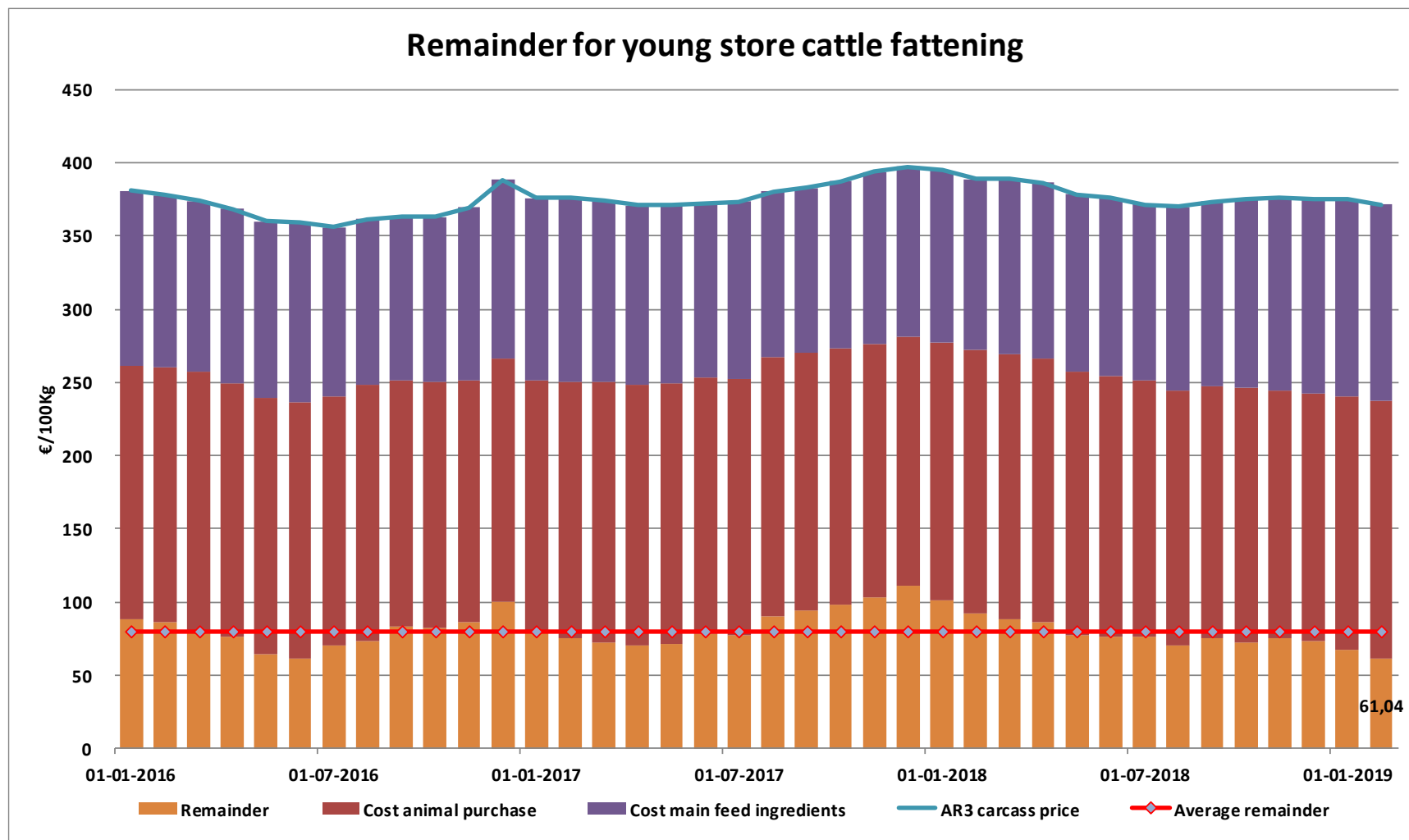
26 March 2019

REMAINDERS



26 March 2019

REMAINDERS



26 March 2019

Forecast Summary

	2017	2018	2019	2020
EU.15 PRODUCTION (1000T)	+ 2.35% 6 913	- 0.76% 7 049	+ 1.96% 6 872	- 2.51% 6 793
EU.15 CONSUMPTION (1000T)	+ 7.60% 6 745	+ 1.04% 7 258	- 0.47% 7 333	- 0.23% 7 299
BALANCE	169	- 209	- 461	- 506
EU.13 PRODUCTION (1000T)	+ 5.96% 882	+ 2.03% 900	+ 2.31% 921	+ 1.50% 934
EU.13 CONSUMPTION (1000T)	+ 3.95% 452	+ 6.73% 482	+ 0.80% 486	+ 1.02% 491
BALANCE	430	417	434	443
EU.28 PRODUCTION (1000T)	- 0.04% 7 795	+ 1.97% 7 949	- 1.96% 7 793	- 0.84% 7 727
EU.28 CONSUMPTION (1000T)	+ 7.38% 7 709	+ 1.37% 7 815	- 0.39% 7 785	- 0.15% 7 773
BALANCE	86	133	8	- 46
EU - CARCASS PRICES	2017	2018	2019	2020
ADULT MALE BOVINES (€/100 kg)	+ 1.7% 377.0	- 0.31% 375.9	- 0.33% 374.6	- 0.16% 374.0
COWS (€/100 kg)	- 0.8% 266.9	+ 2.05% 272.4	- 0.93% 269.9	+ 1.34% 273.5

Sources : EStat New Cronos, Member States

26 March 2019

TRADE

EU EXPORTS

Beef & Live Animals

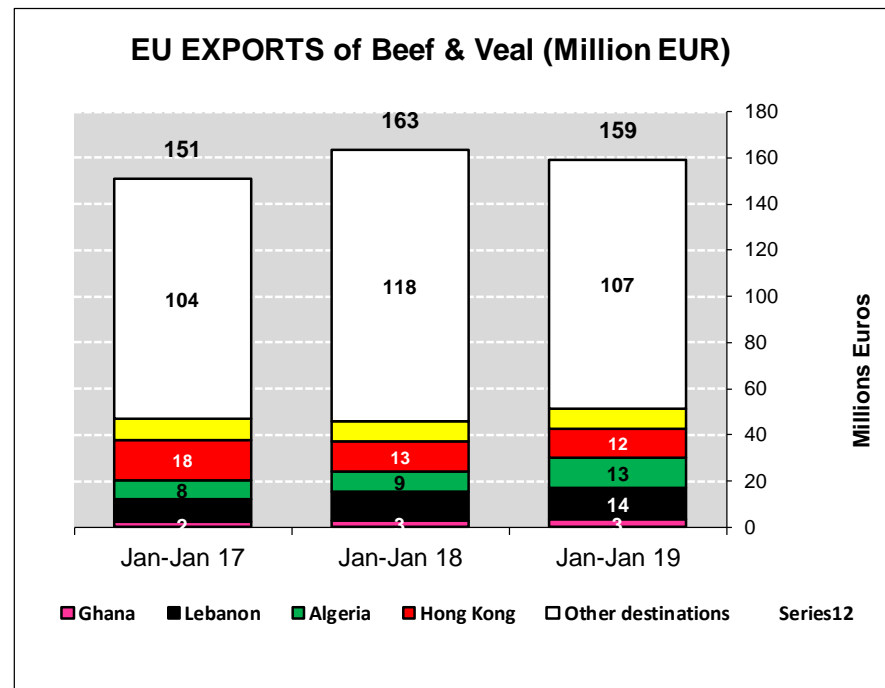
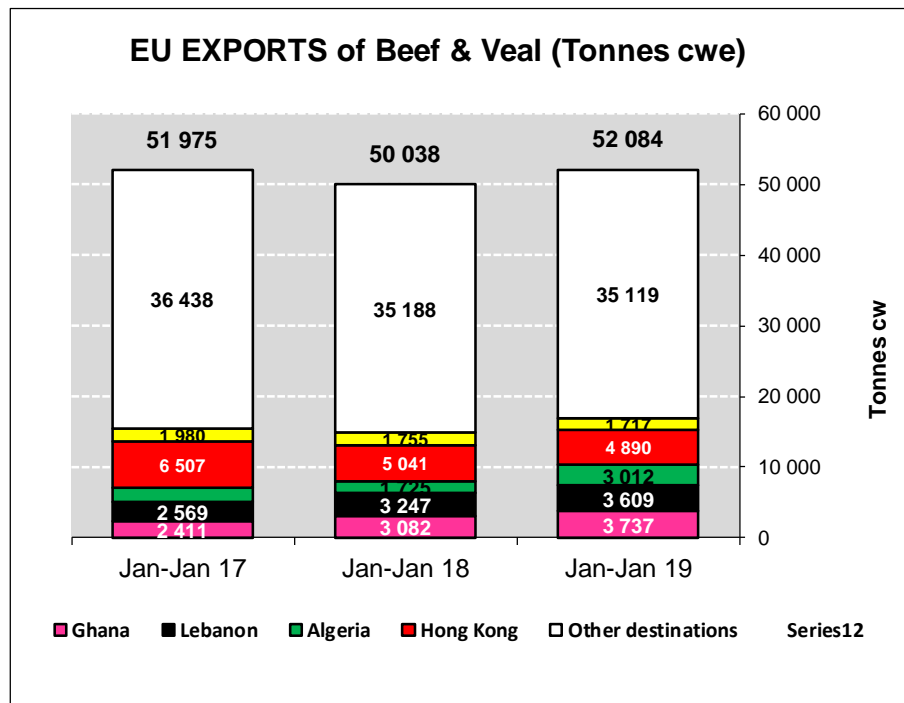
EU exports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Destinations	2015		2016		2017		2018		Jan-Jan 19		Compared to Jan-Jan 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Israel	18 851	3.1%	41 535	5.9%	44 196	5.8%	47 812	6.5%	5 203	10.0%	+ 17.4%
Hong Kong	45 198	7.5%	58 383	8.3%	90 659	11.9%	69 795	9.5%	4 890	9.4%	- 3.0%
Ghana	39 225	6.6%	39 680	5.6%	41 007	5.4%	39 906	5.4%	3 737	7.2%	+ 21.2%
Lebanon	50 263	8.4%	47 033	6.7%	38 554	5.0%	42 525	5.8%	3 609	6.9%	+ 11.2%
Bosnia-Herz.	39 896	6.7%	38 875	5.5%	34 711	4.5%	38 763	5.3%	3 122	6.0%	+ 67.7%
Algeria	16 085	2.7%	25 004	3.5%	26 305	3.4%	35 361	4.8%	3 012	5.8%	+ 74.6%
Ivory Coast	36 018	6.0%	37 210	5.3%	38 582	5.0%	37 744	5.1%	2 220	4.3%	- 27.0%
Philippines	13 052	2.2%	24 454	3.5%	38 271	5.0%	29 794	4.1%	2 182	4.2%	- 3.5%
Turkey	57 504	9.6%	71 030	10.1%	96 414	12.6%	95 505	13.0%	1 832	3.5%	- 72.3%
Switzerland	26 015	4.3%	25 599	3.6%	27 370	3.6%	24 416	3.3%	1 717	3.3%	- 2.1%
Ukraine	2 859	0.5%	7 875	1.1%	7 331	1.0%	10 465	1.4%	1 352	2.6%	+ 104.3%
Chile	50	0.0%	2 228	0.3%	8 961	1.2%	16 410	2.2%	1 318	2.5%	+ 24.4%
Morocco	4 703	0.8%	7 517	1.1%	10 015	1.3%	11 430	1.6%	991	1.9%	+ 132.1%
South Africa	7 508	1.3%	7 335	1.0%	7 569	1.0%	12 113	1.7%	961	1.8%	+ 87.2%
Vietnam	11 881	2.0%	22 308	3.2%	14 205	1.9%	9 171	1.3%	832	1.6%	+ 149.7%
For.JRep.Mac	12 561	2.1%	11 804	1.7%	11 541	1.5%	10 191	1.4%	831	1.6%	+ 14.4%
Russia	13 546	2.3%	16 433	2.3%	22 989	3.0%	17 336	2.4%	820	1.6%	+ 34.2%
Other Destinations	203 501	34.0%	222 404	31.5%	205 558	26.9%	184 598	25.2%	13 456	25.8%	
Extra-EU	598 715		706 705		764 237		733 335		52 084		
% change			+ 18%		+ 8%		- 4%		+ 4.1%		

EU exports of beef: Trade figures (COMEXT – tonnes cwe)

Destinations	2015		2016		2017		2018		Jan-Jan 19		Compared to Jan-Jan 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	45 198	10.7%	58 383	12.0%	90 659	17.1%	69 795	14.0%	4 890	12.9%	- 3.0%
Ghana	39 225	9.3%	39 680	8.1%	41 007	7.8%	39 906	8.0%	3 737	9.8%	+ 21.2%
Bosnia-Herz.	36 593	8.7%	36 790	7.6%	32 181	6.1%	36 152	7.2%	2 991	7.9%	+ 72.1%
Israel	6 087	1.4%	15 056	3.1%	18 749	3.5%	22 207	4.5%	2 324	6.1%	+ 51.8%
Ivory Coast	36 016	8.6%	37 210	7.6%	38 572	7.3%	37 744	7.6%	2 220	5.8%	- 27.0%
Philippines	13 052	3.1%	24 454	5.0%	38 271	7.2%	29 794	6.0%	2 182	5.7%	- 3.5%
Switzerland	25 006	5.9%	24 425	5.0%	26 232	5.0%	23 365	4.7%	1 629	4.3%	- 2.0%
Algeria	6 662	1.6%	10 726	2.2%	12 304	2.3%	13 919	2.8%	1 599	4.2%	+++
Ukraine	2 747	0.7%	7 094	1.5%	6 926	1.3%	9 887	2.0%	1 352	3.6%	+++
Chile	50	0.0%	2 228	0.5%	8 961	1.7%	16 410	3.3%	1 318	3.5%	+ 24.4%
South Africa	7 508	1.8%	7 335	1.5%	7 569	1.4%	12 113	2.4%	961	2.5%	+ 87.2%
Vietnam	11 881	2.8%	22 308	4.6%	14 205	2.7%	9 171	1.8%	832	2.2%	+++
For.JRep.Mac	12 375	2.9%	11 479	2.4%	11 285	2.1%	10 002	2.0%	792	2.1%	+ 9.0%
China	6 027	1.4%	10 804	2.2%	6 229	1.2%	7 347	1.5%	759	2.0%	+++
USA	2 633	0.6%	3 855	0.8%	4 576	0.9%	5 830	1.2%	732	1.9%	+ 87.2%
Cuba	4 053	1.0%	2 366	0.5%	2 040	0.4%	2 202	0.4%	530	1.4%	+ 0.1%
Canada	19	0.0%	1 754	0.4%	3 053	0.6%	2 881	0.6%	518	1.4%	+++
Other Destinations	165 690	39.4%	170 944	35.1%	166 265	31.4%	150 220	30.1%	8 627	22.7%	
Extra-EU	420 822		486 889		529 083		498 943		37 993		
% change			+ 16%		+ 9%		- 6%		+ 12.3%		

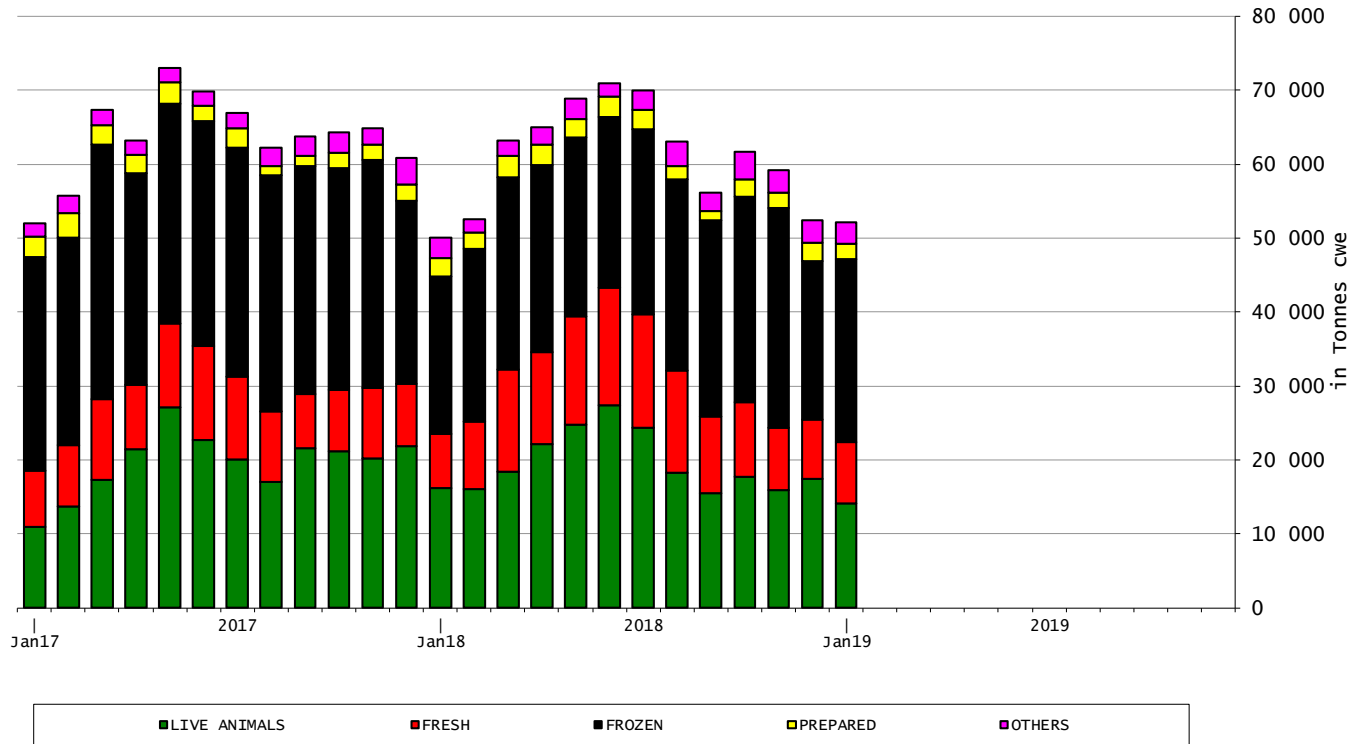
EU exports of beef and live animals: Trade figures (COMEXT)



TRADE

EU EXPORTS Beef Products

EU-28 Exports of BEEF products



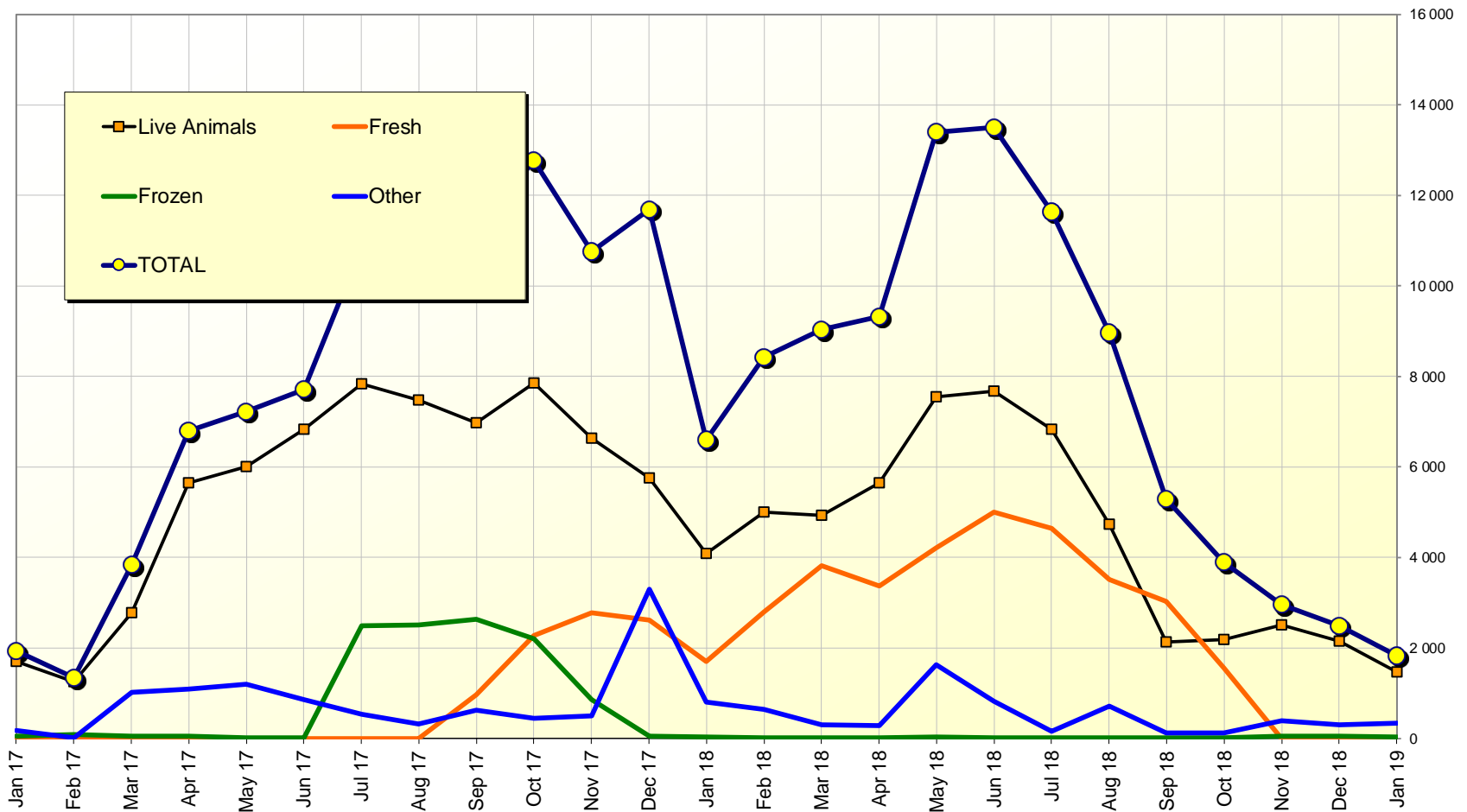
26 March 2019

TRADE

EU EXPORTS

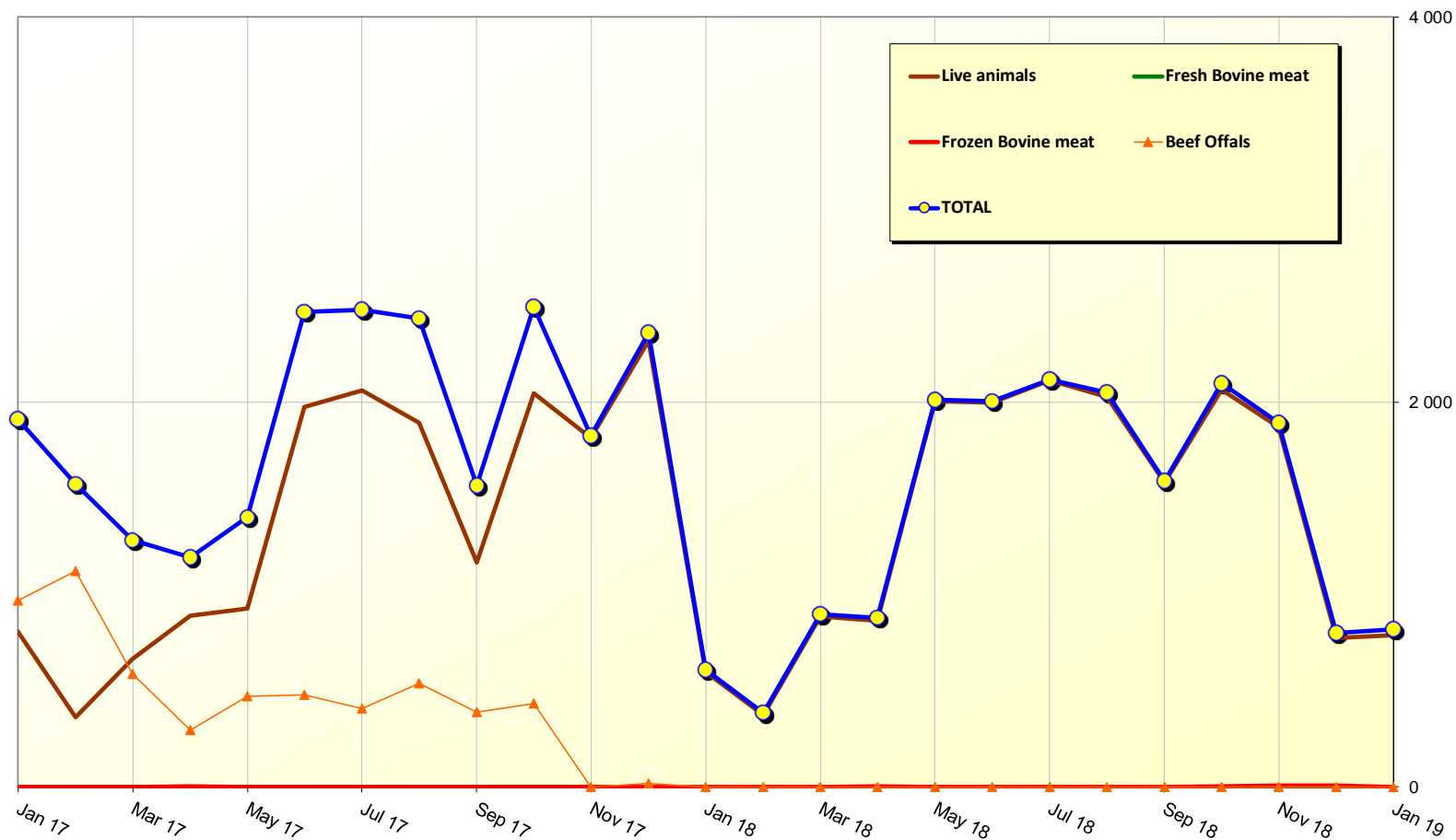
Beef to TURKEY

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



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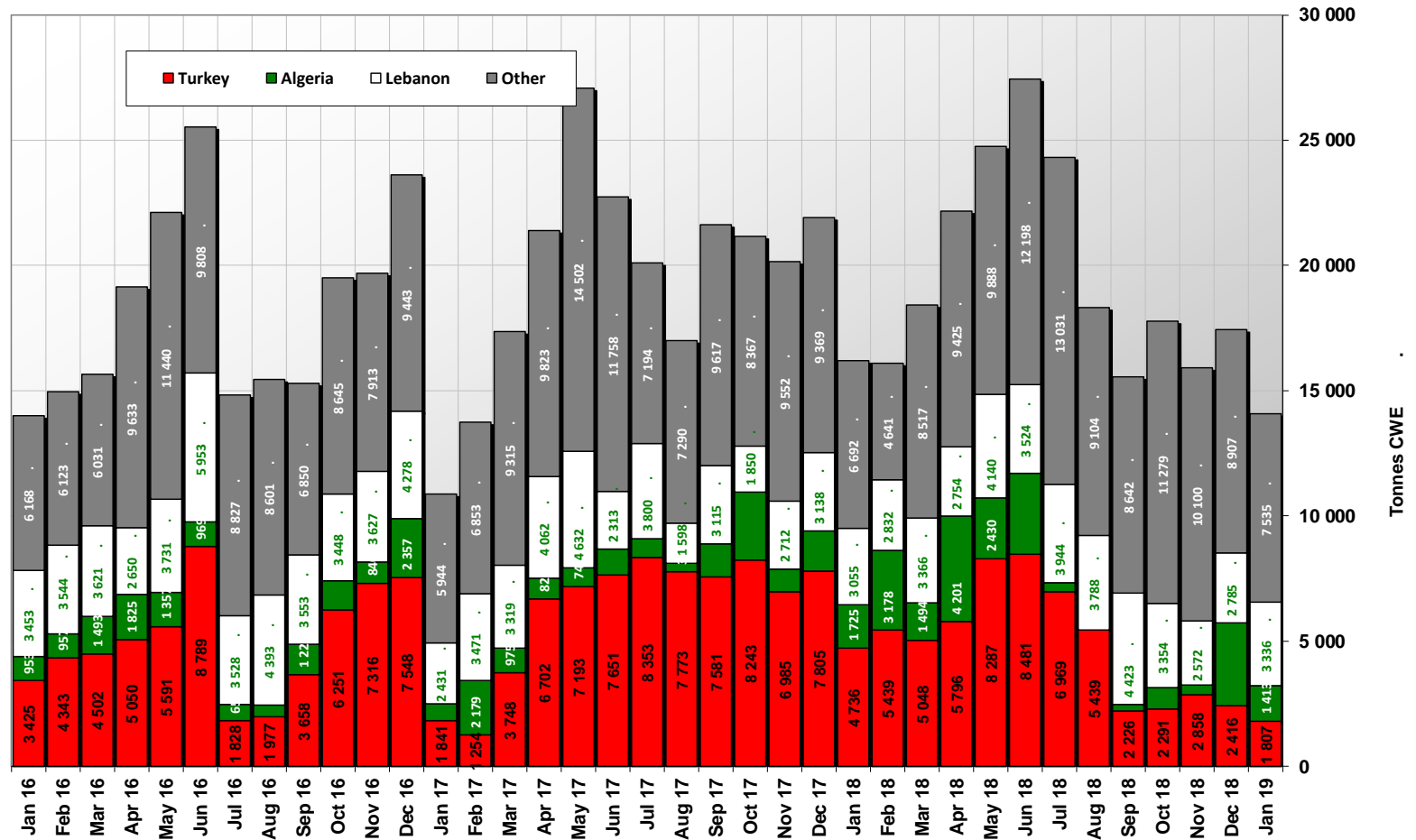
EU beef Exports to RUSSIA Trade figures (COMEXT data) *tonnes cwe*



26 March 2019

EU-28 Exports of LIVE Bovine Animals

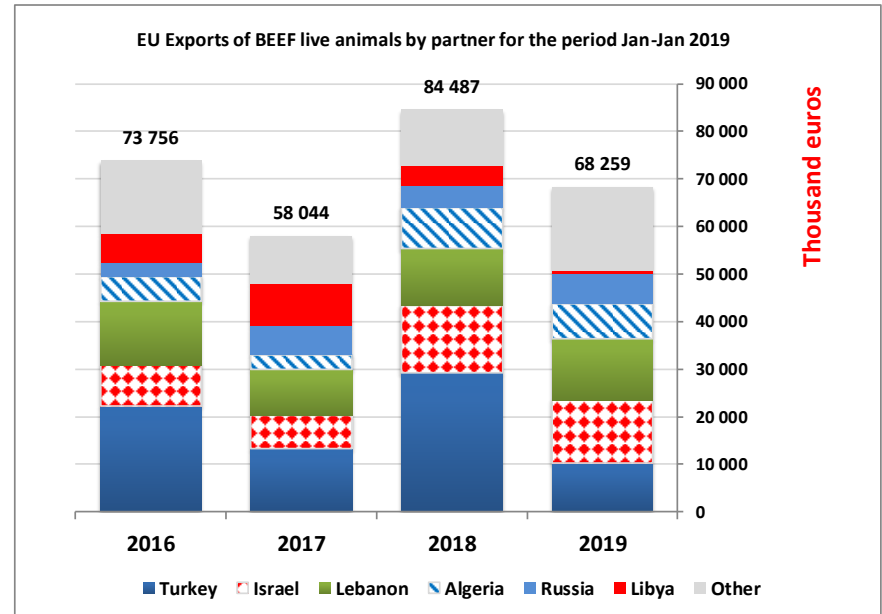
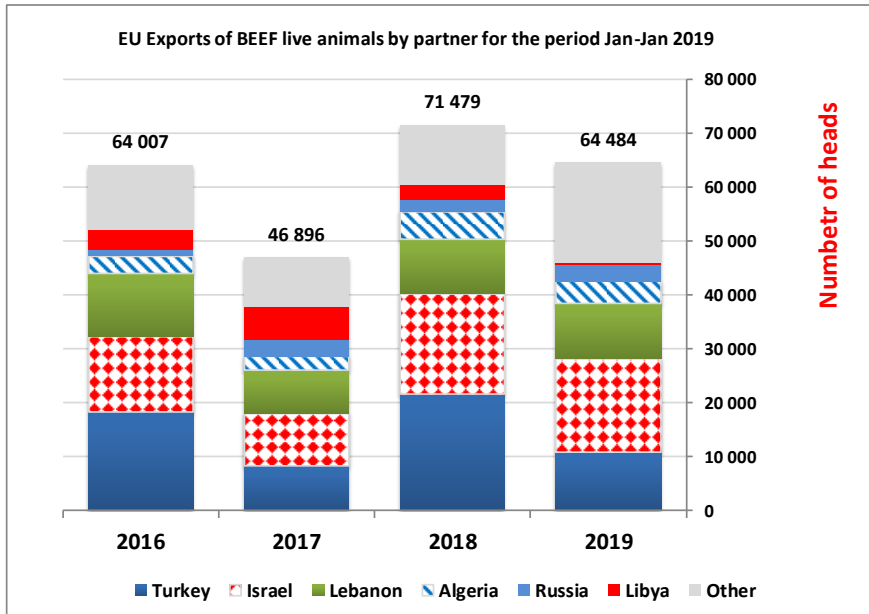
(Source COMEXT - Tonnes cwe)



26 March 2019

TRADE

EU EXPORTS Live Animals



26 March 2019

TRADE

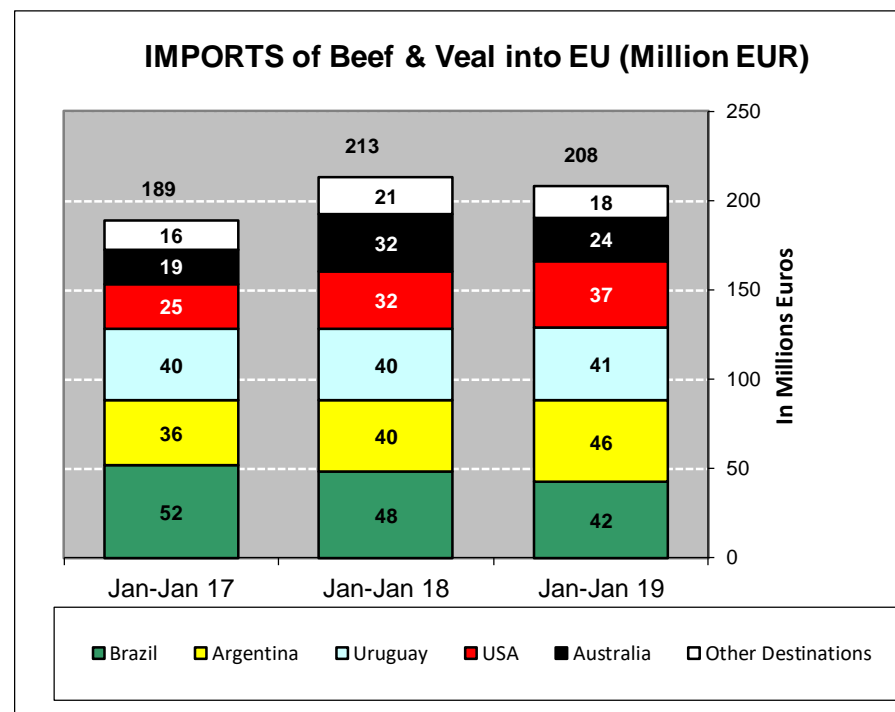
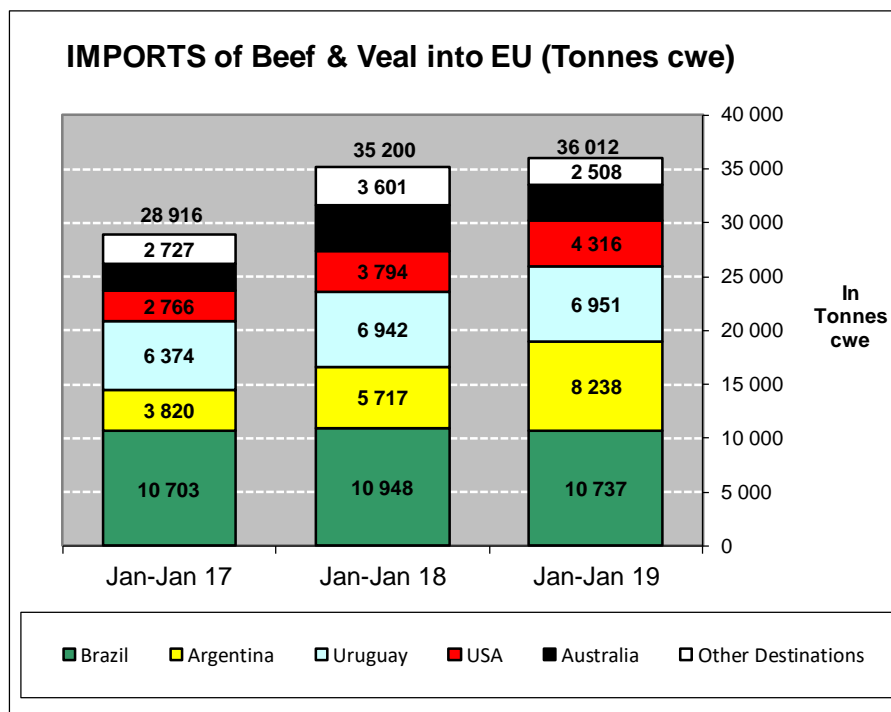
EU IMPORTS

Beef & Live Animals

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

Origins	2015		2016		2017		2018		Jan-Jan 19		Compared to Jan-Jan 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	136 858	42.4%	140 319	42.0%	115 392	37.7%	140 192	41.1%	10 737	29.8%	- 1.9%
Argentina	42 149	13.0%	43 542	13.0%	49 890	16.3%	69 996	20.5%	8 238	22.9%	+ 44.1%
Uruguay	46 287	14.3%	56 747	17.0%	58 016	19.0%	52 462	15.4%	6 951	19.3%	+ 0.1%
USA	24 132	7.5%	20 499	6.1%	21 624	7.1%	19 319	5.7%	4 316	12.0%	+ 13.8%
Australia	30 884	9.6%	27 850	8.3%	21 990	7.2%	20 868	6.1%	3 264	9.1%	- 22.2%
New Zealand	11 380	3.5%	9 869	3.0%	8 093	2.6%	8 669	2.5%	768	2.1%	- 21.2%
Paraguay	1 915	0.6%	5 979	1.8%	6 915	2.3%	6 287	1.8%	496	1.4%	- 16.6%
Switzerland	5 090	1.6%	5 500	1.6%	5 138	1.7%	5 437	1.6%	492	1.4%	+ 10.5%
Namibia	12 112	3.7%	10 686	3.2%	7 705	2.5%	5 585	1.6%	247	0.7%	- 71.2%
Botswana	9 258	2.9%	9 382	2.8%	7 718	2.5%	6 994	2.1%	182	0.5%	- 57.4%
Canada	428	0.1%	421	0.1%	513	0.2%	1 343	0.4%	135	0.4%	+++
China	2	0.0%	52	0.0%	22	0.0%	30	0.0%	50	0.1%	+++
Ukraine	20	0.0%	317	0.1%	374	0.1%	257	0.1%	42	0.1%	+ 0.2%
Other Origins	2 585	0.8%	2 788	0.8%	2 715	0.9%	3 512	1.0%	95	0.3%	
Extra-EU	323 099		333 952		306 105		340 952		36 012		
% change			+ 3%		- 8%		+ 11%		+ 2.3%		

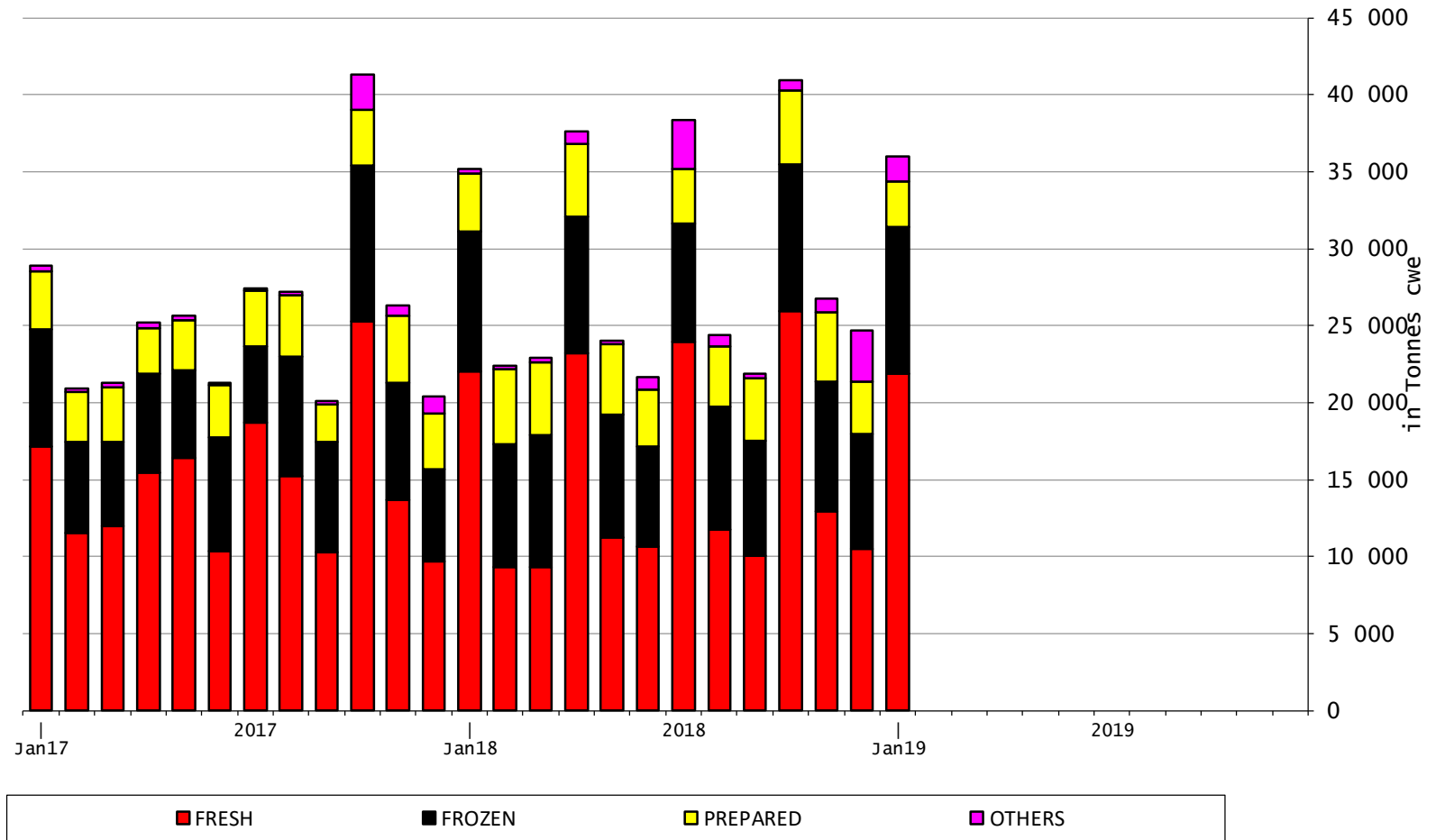
EU imports of beef and live animals (2): Trade figures (COMEXT)



TRADE

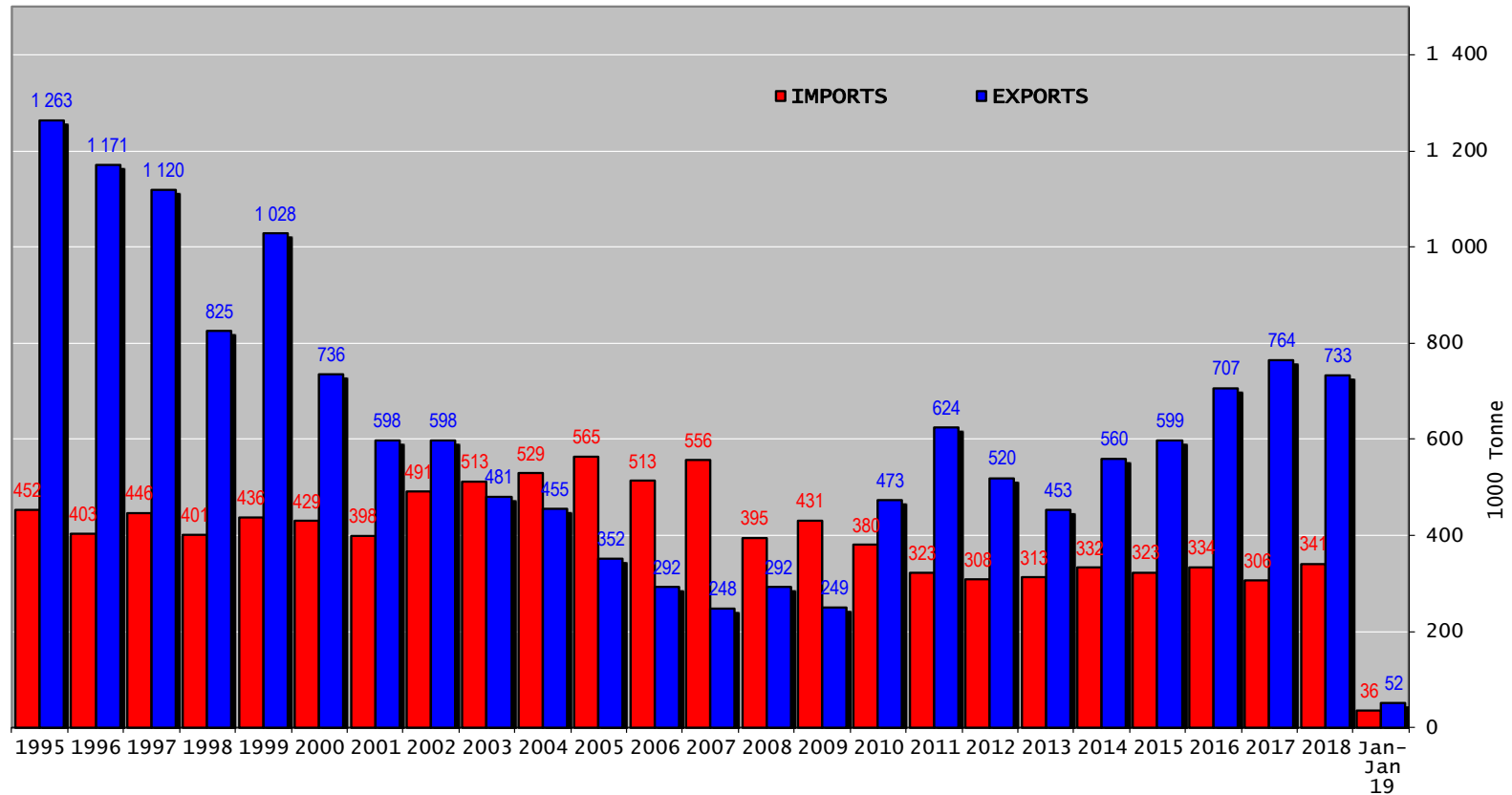
EU IMPORTS Beef Products

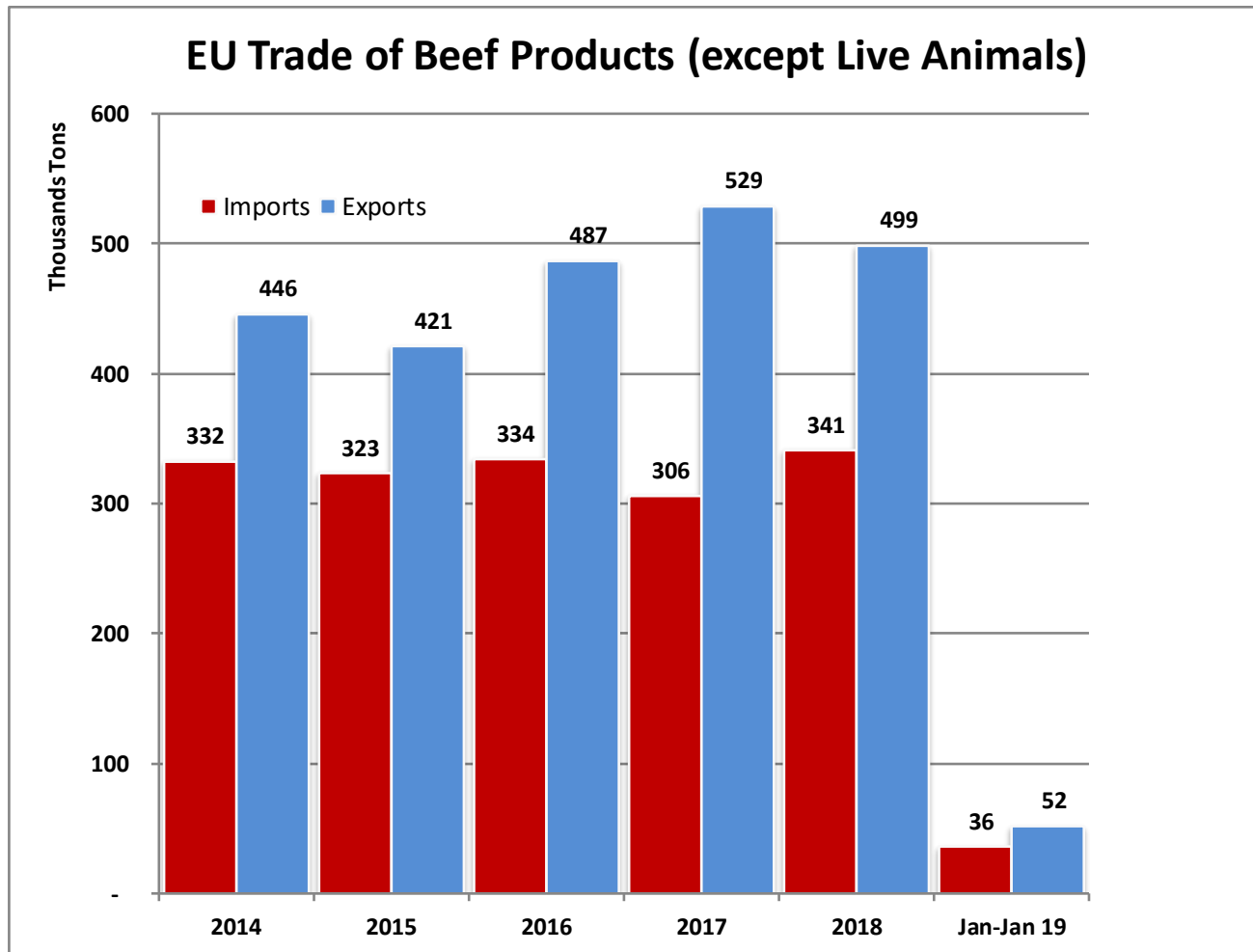
EU-28 Imports of BEEF products



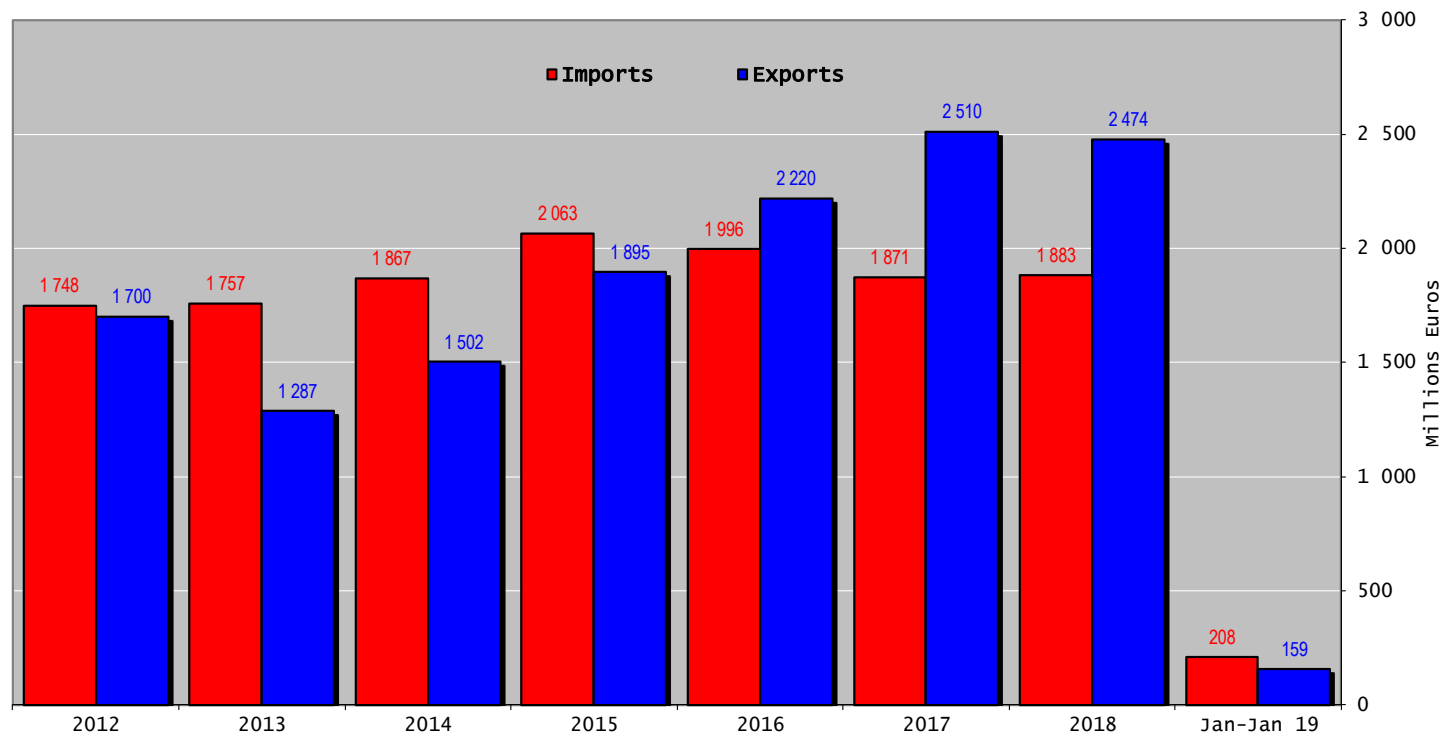
26 March 2019

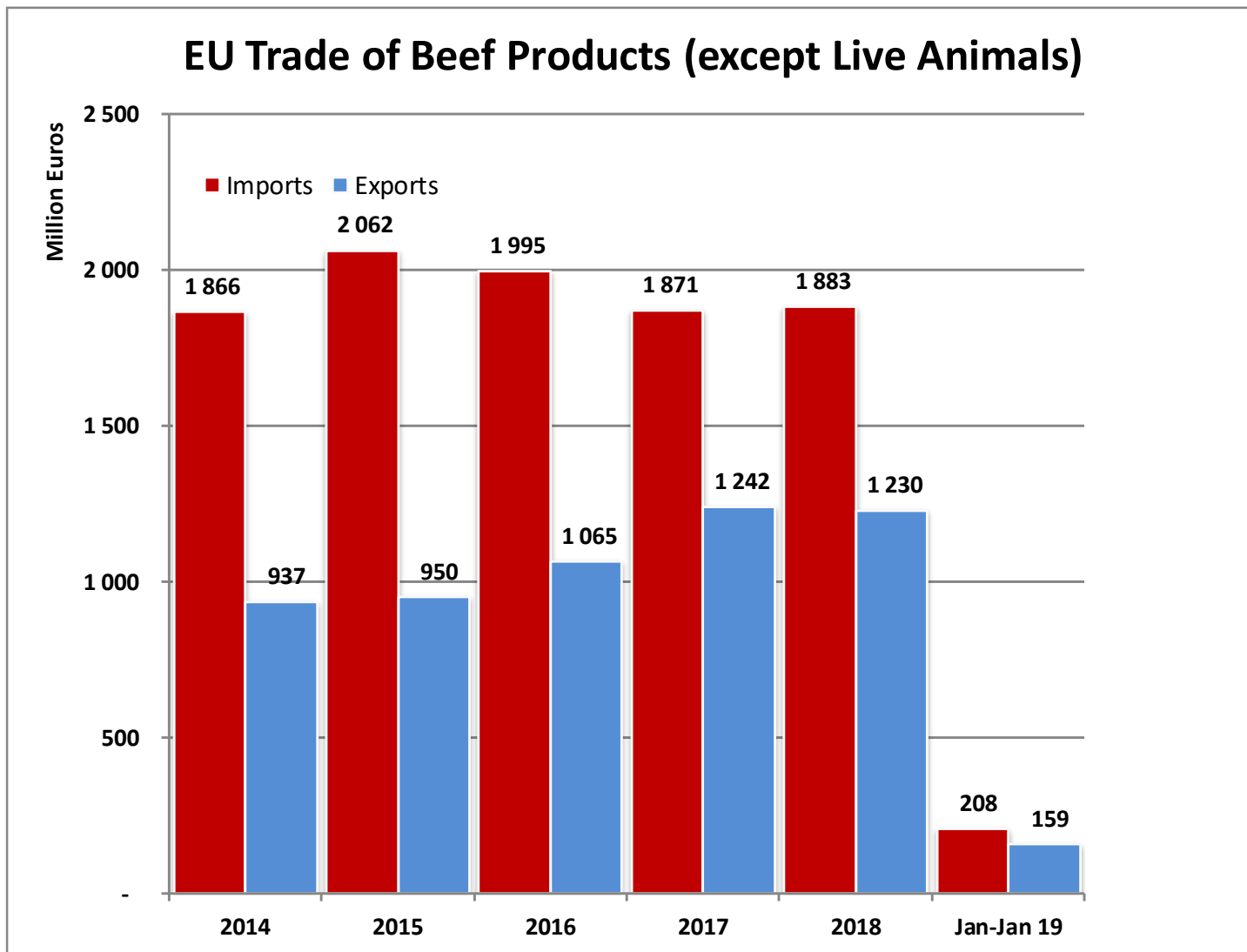
Trade balance of beef and live animals





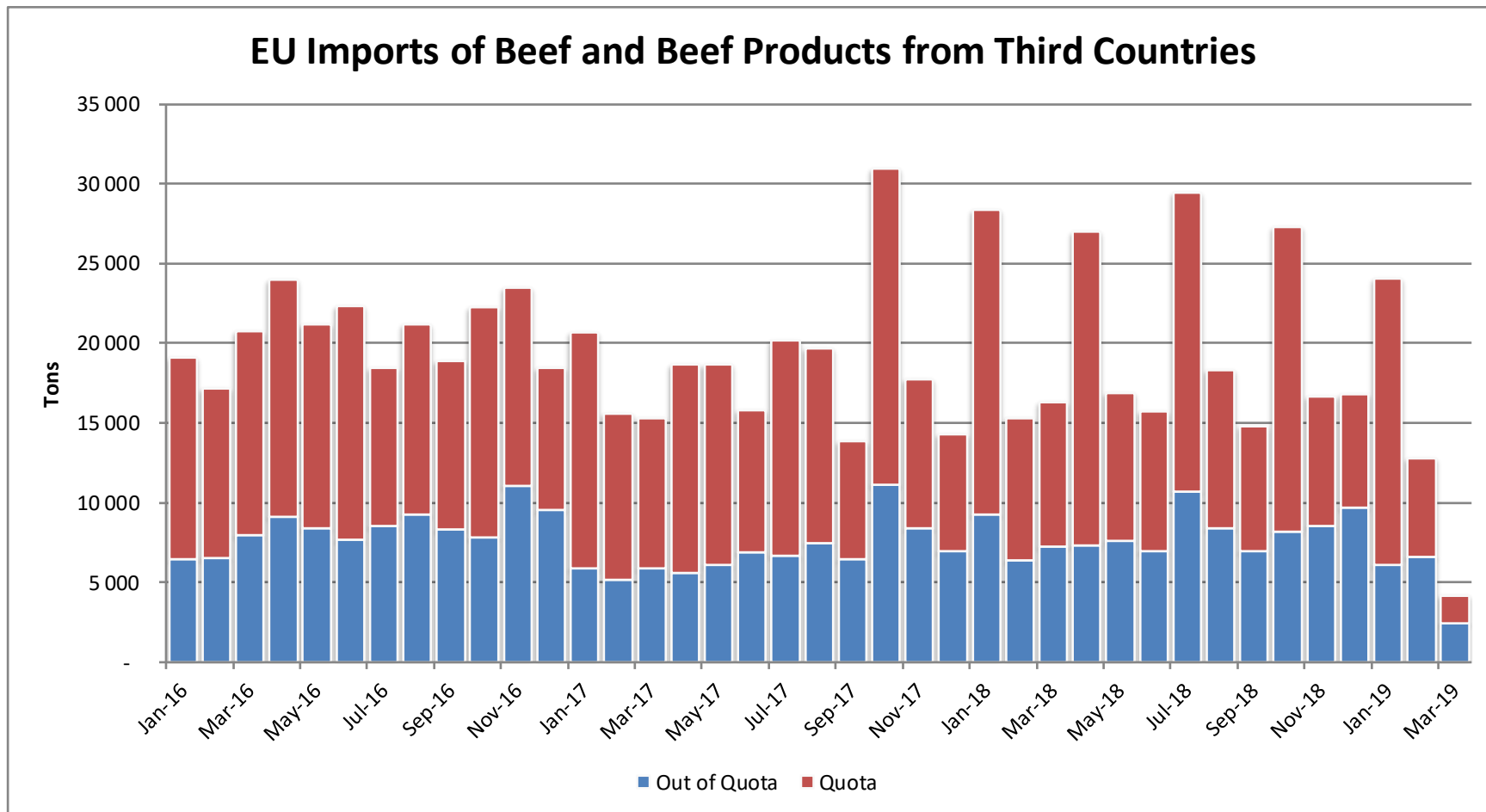
Trade balance of beef and live animals





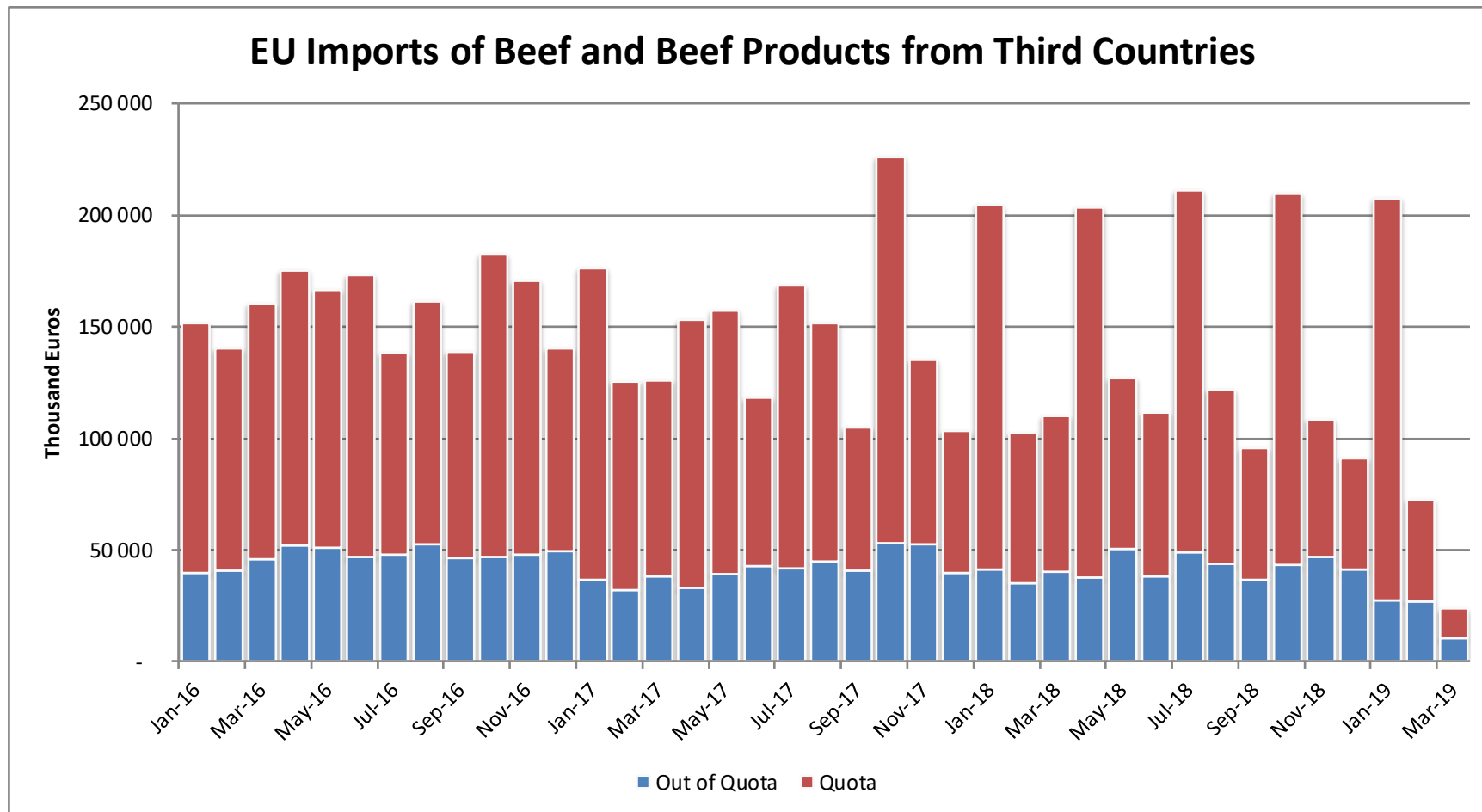
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Imports in and out of TRQs



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Imports in and out of TRQs



26 March 2019

High Quality Beef Import Quotas

Hilton Quota

Regulation (EU) N° 593/2013

		Quantity allocated (Tons)	2016/2017		2017/2018		2018/2019*	
			Use		Use		Use	
09.4001	Australia	2 250						
09.4004	Argentina	200	12.75	6.38%	14.67	7.34%	6.38	3.19%
09.4450	Argentina	29 500	23 111.89	78.35%	28 091.29	95.22%	18 870.88	63.97%
09.4451	Australia	7 150	4 051.04	56.66%	5 333.48	74.59%	3 751.89	52.47%
09.4452	Uruguay	6 376	6 365.55	99.84%	6 363.24	99.80%	3 940.46	61.80%
09.4453	Brazil	10 000	8 572.40	85.72%	5 057.27	50.57%	3 343.14	33.43%
09.4454	New Zealand	1 300	1 161.63	89.36%	1 122.25	86.33%	661.67	50.90%
09.4002	Canada/US	11 500	421.40	3.66%	2 351.37	20.45%	3 375.00	29.35%
09.4455	Paraguay	1 000	982.60	98.26%	962.21	96.22%	577.86	57.79%
Total Beef		66 826	44 666.51	66.84%	49 281.11	73.75%	34 520.90	51.66%
Total Buffalo		2 450	12.75	0.52%	14.67	0.60%	6.38	0.26%
Total		69 276	44 679.26	64.49%	49 295.78	71.16%	34 527.28	49.84%

* up to 31/01/2019

High Quality Beef Import Quotas

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%	

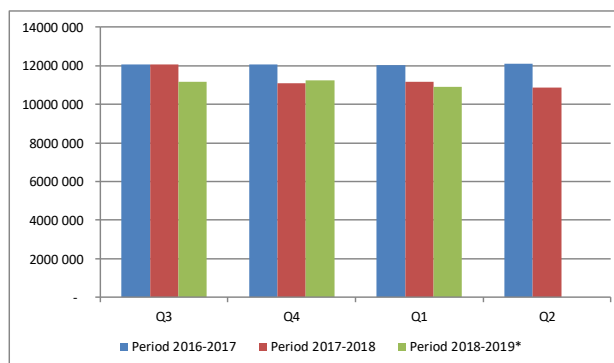
	2015-Q3	2015-Q4	2016-Q1	2016-Q2	TOTAL
Period 2015-2016	11 952 185	11 851 187	11 535 011	12 664 673	48 003 056
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	99.19%	98.35%	95.73%	105.10%	99.59%
Available after transfer	12 050 000	12 147 815	12 346 627	12 861 617	
	99.19%	97.56%	93.43%	98.47%	

	2016-Q3	2016-Q4	2017-Q1	2017-Q2	TOTAL
Period 2016-2017	12 059 567	12 062 828	12 015 258	12 095 591	48 233 243
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	11 102 252	11 161 480	10 859 149	45 174 696
Available	12 050 000	11 161 000	11 250 000	11 250 000	45 711 000
Use	100.00%	99.47%	99.21%	96.53%	98.83%
Available after transfer	12 050 000	11 159 185	11 308 748	11 338 520	
	100.00%	99.49%	98.70%	95.77%	

	2018-Q3	2018-Q4	2019-Q1	2019-Q2	TOTAL
Period 2018-2019*	11 164 832	11 241 344	10 895 387	-	33 301 563
Available	11 250 000	11 250 000	11 250 000		45 000 000
Use	99.24%				74.00%
Available after transfer	11 250 000	11 335 168	11 258 656		
	99.24%	99.17%	96.77%		

* Until 14.03.2019

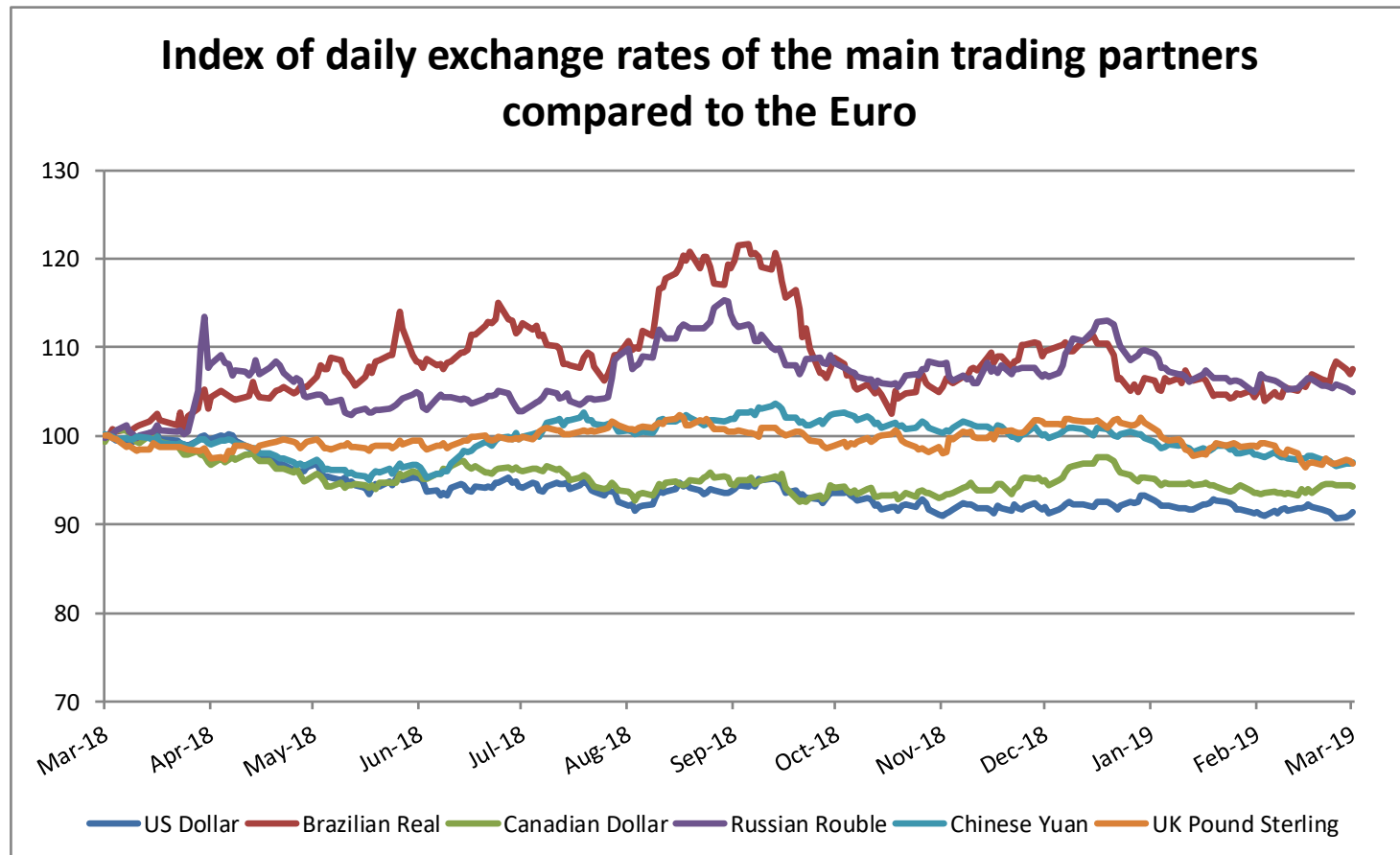


26 March 2019

WORLD BEEF MARKET

EXCHANGE RATE INDEX / Euro

Main Trading Partners



Source : ECB

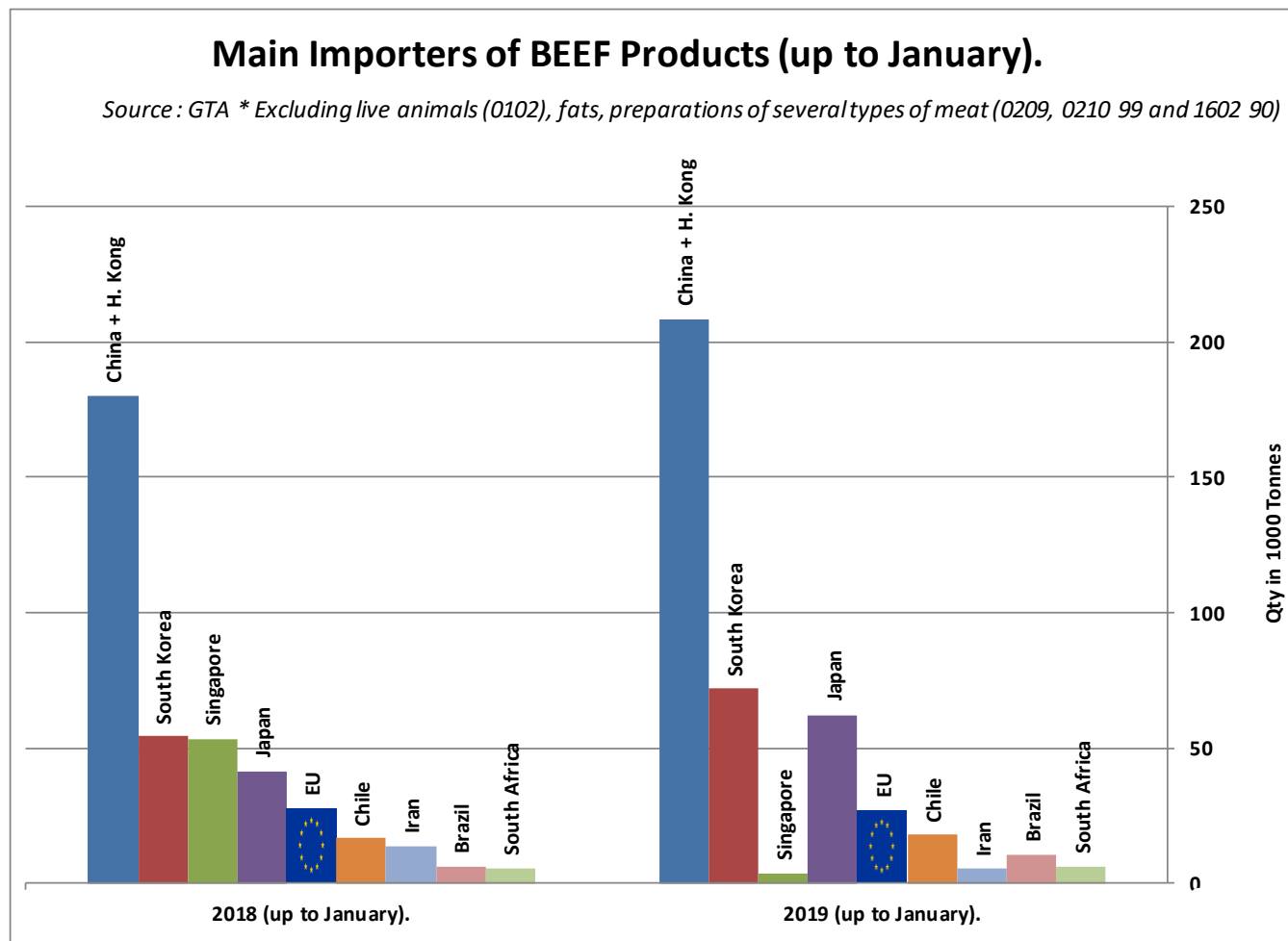
26 March 2019

WORLD BEEF MARKET

E.U. IMPORTS BEEF MAIN IMPORTERS

Source : GTA

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



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WORLD BEEF MARKET

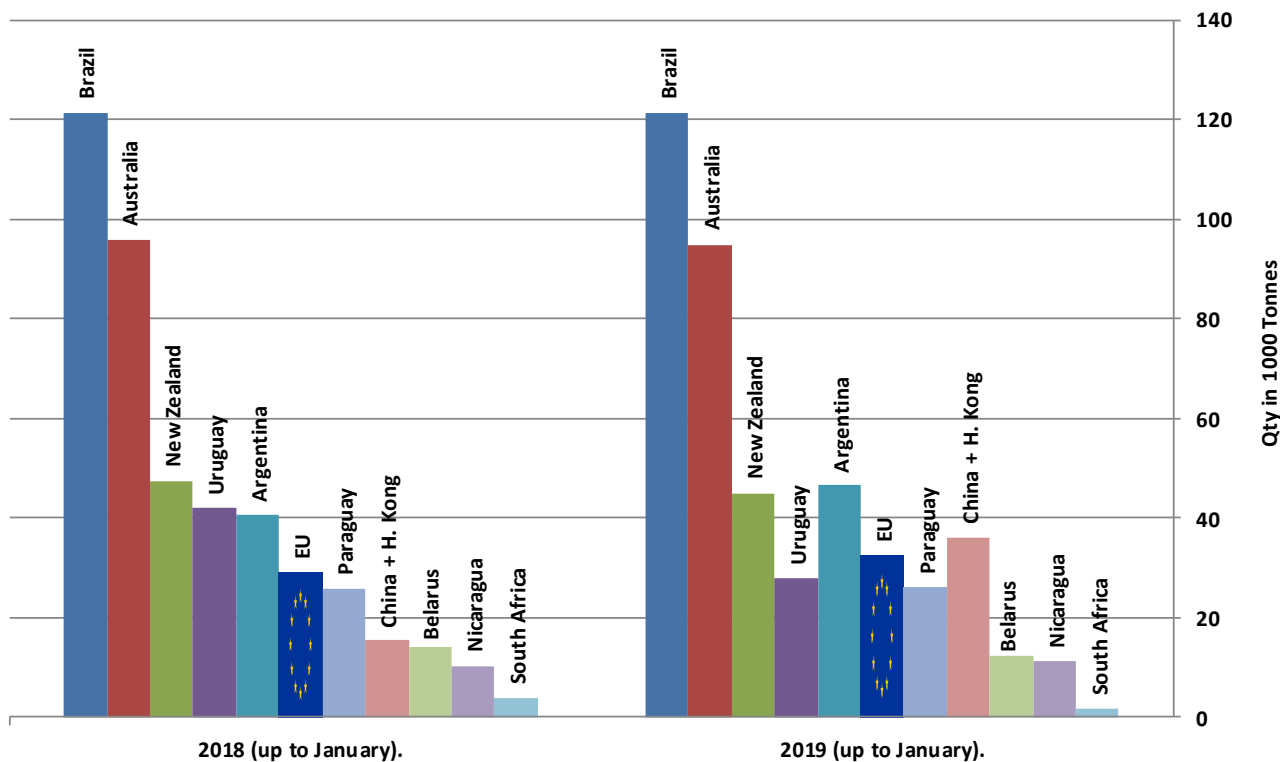
E.U. EXPORTS BEEF MAIN EXPORTERS

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 January).

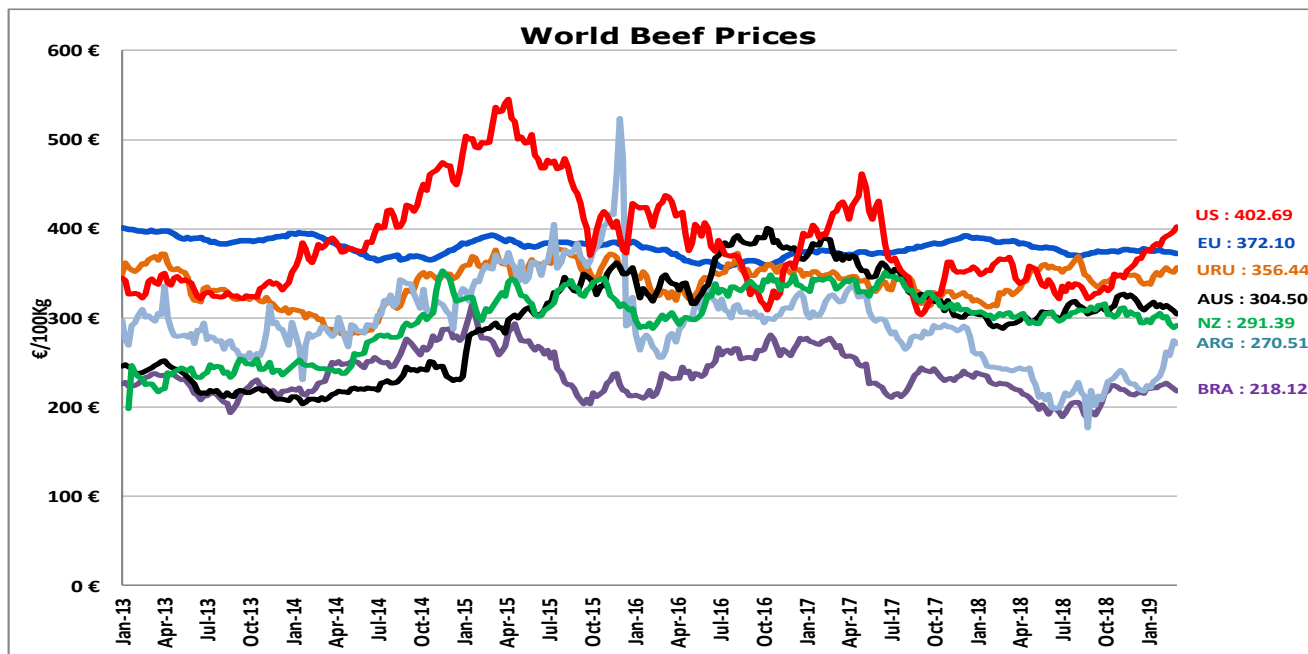
Source : GTA * Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



26 March 2019

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

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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/>