



BEEF & VEAL MARKET SITUATION



Civil dialogue group – animal production

31 March 2023

LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION
TOTAL BOVINE

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2022 2021	BOVINE < 1 Year				%Var 2022 2021	BOVINE 1-2 Year				%Var 2022 2021	BOVINE > 2 Year				%Var 2022 2021
	2019	2020	2021	2022		2019	2020	2021	2022		2019	2020	2021	2022		2019	2020	2021	2022	
BE	2 373	2 335	2 310	2 286	-1.1%	722	712	713	694	-2.7%	464	461	454	454	-0.0%	1 188	1 163	1 143	1 138	-0.5%
BG	527	589	611	579	-5.2%	100	112	121	108	-11.3%	58	71	67	69	+3.4%	369	406	423	402	-4.8%
CZ	1 367	1 340	1 359	1 390	+2.3%	411	405	408	407	-0.4%	299	295	296	314	+6.1%	657	640	655	669	+2.2%
DK	1 500	1 500	1 480	1 466	-0.9%	522	524	516	510	-1.2%	280	279	280	281	+0.4%	698	697	684	675	-1.3%
DE	11 640	11 302	11 040	10 997	-0.4%	3 485	3 405	3 355	3 308	-1.4%	2 751	2 639	2 569	2 600	+1.2%	5 403	5 258	5 116	5 089	-0.5%
EE	254	253	251	250	-0.5%	71	72	69	69	+0.3%	50	49	51	49	-3.7%	133	132	131	132	+0.4%
IE	6 560	6 529	6 649	6 552	-1.5%	1 962	2 057	2 108	1 995	-5.3%	1 741	1 708	1 775	1 810	+2.0%	2 856	2 765	2 766	2 746	-0.7%
EL	530	632	614	607	-1.2%	157	162	176	170	-3.5%	91	145	114	122	+7.7%	283	325	324	314	-3.0%
ES	6 600	6 636	6 576	6 456	-1.8%	2 529	2 541	2 319	2 487	+7.2%	857	853	1 016	786	-22.6%	3 214	3 242	3 240	3 182	-1.8%
FR	18 173	17 816	17 330	16 986	-2.0%	5 125	5 119	4 945	4 868	-1.6%	3 183	3 063	3 021	2 992	-1.0%	9 865	9 634	9 364	9 127	-2.5%
HR	420	423	428	422	-1.4%	151	146	156	149	-4.5%	107	111	107	112	+4.7%	162	166	165	161	-2.4%
IT	6 377	6 400	6 280	6 049	-3.7%	1 759	1 774	1 722	1 563	-9.2%	1 588	1 595	1 562	1 520	-2.7%	3 030	3 031	2 997	2 966	-1.0%
CY	74	83	85	81	-3.7%	25	27	27	25	-7.4%	12	14	15	15	-2.8%	38	42	43	42	-1.8%
LV	395	399	393	391	-0.5%	108	112	107	107	+0.4%	65	65	68	66	-3.3%	222	222	219	219	-0.1%
LT	635	630	629	642	+2.1%	167	169	166	173	+4.5%	132	129	135	130	-3.7%	336	332	328	339	+3.3%
LU	192	191	187	186	-0.6%	50	50	49	48	-2.1%	41	41	40	41	+0.1%	101	100	98	98	-0.1%
HU	909	933	910	894	-1.7%	258	266	269	258	-4.2%	193	195	153	159	+3.6%	458	472	487	477	-2.1%
MT	14	14	14	14	+1.3%	4	4	4	4	+1.6%	3	3	3	3	-3.3%	7	7	7	7	+3.3%
NL	3 721	3 691	3 705	3 751	+1.2%	1 528	1 510	1 519	1 536	+1.1%	440	465	482	496	+2.9%	1 752	1 716	1 704	1 719	+0.9%
AT	1 880	1 855	1 870	1 861	-0.5%	605	599	611	597	-2.3%	426	414	421	430	+2.1%	848	842	838	834	-0.5%
PL	6 262	6 279	6 379	6 448	+1.1%	1 748	1 735	1 802	1 929	+7.0%	1 757	1 800	1 915	1 699	-11.3%	2 758	2 744	2 662	2 821	+6.0%
PT	1 675	1 691	1 641	1 617	-1.4%	531	526	528	433	-18.0%	240	257	214	266	+24.0%	903	909	899	919	+2.2%
RO	1 923	1 875	1 827	1 825	-0.1%	400	369	347	346	-0.4%	223	225	222	222	+0.0%	1 300	1 281	1 258	1 258	-0.0%
SI	483	486	483	465	-3.7%	151	153	157	149	-4.9%	136	133	131	130	-0.6%	197	199	195	186	-4.8%
SK	432	442	434	426	-1.8%	122	126	125	122	-2.1%	83	87	82	82	-0.3%	227	229	228	222	-2.3%
FI	841	835	830	822	-1.0%	287	292	287	283	-1.3%	205	199	205	203	-1.1%	349	344	338	336	-0.6%
SE	1 405	1 391	1 390	1 391	+0.0%	453	464	460	461	+0.2%	339	323	334	333	-0.4%	613	603	596	597	+0.2%
EU	77 161	76 551	75 705	74 856	-1.1%	23 431	23 428	23 065	22 798	-1.2%	15 764	15 621	15 732	15 382	-2.2%	37 966	37 503	36 908	36 675	-0.6%
UK	9 459					2 860					2 335					4 264				

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2021 AND 2022

LIVESTOCK

DECEMBER SURVEY

Dec	TOTAL COWS					%Var 2022 2021	DAIRY COWS					%Var 2022 2021	OTHER COWS					%Var 2022 2021
1000 Hd	2019	2020	2021	2022		2019	2020	2021	2022		2019	2020	2021	2022				
BE	939	921	917	913	-0.4%	538	538	537	544	+1.2%	401	383	379	370	-2.6%			
BG	343	382	397	377	-5.1%	227	242	230	213	-7.7%	116	140	166	164	-1.5%			
CZ	570	560	574	579	+0.9%	361	357	362	357	-1.6%	209	203	212	223	+5.2%			
DK	645	646	635	627	-1.3%	563	565	559	556	-0.5%	83	80	76	70	-7.9%			
DE	4 651	4 548	4 445	4 420	-0.6%	4 012	3 921	3 833	3 810	-0.6%	640	626	612	610	-0.3%			
EE	116	116	115	115	-0.4%	85	84	84	84	+0.1%	31	32	31	31	-1.6%			
IE	2 383	2 379	2 395	2 372	-1.0%	1 426	1 456	1 505	1 510	+0.3%	957	923	890	862	-3.1%			
EL	242	210	213	207	-3.0%	86	90	91	88	-3.8%	156	120	122	119	-2.5%			
ES	2 881	2 909	2 900	2 889	-0.4%	813	811	809	810	+0.2%	2 068	2 099	2 091	2 079	-0.6%			
FR	7 505	7 379	7 204	7 020	-2.6%	3 491	3 406	3 322	3 231	-2.7%	4 014	3 974	3 882	3 790	-2.4%			
HR	142	144	142	138	-2.8%	130	110	102	79	-22.5%	12	34	40	59	+47.5%			
IT	2 237	2 243	2 193	2 348	+7.1%	1 876	1 871	1 844	1 865	+1.1%	362	372	349	483	+38.6%			
CY	35	40	40	38	-3.5%	35	39	39	38	-1.6%	0	0	1	0	-100.0%			
LV	195	196	193	191	-1.0%	138	136	131	128	-2.6%	56	60	61	63	+2.4%			
LT	299	295	290	291	+0.4%	241	233	225	224	-0.5%	58	62	65	67	+3.4%			
LU	79	78	78	77	-0.5%	54	54	55	55	+1.4%	25	24	23	22	-4.9%			
HU	412	414	423	421	-0.4%	243	247	281	278	-1.1%	169	167	142	143	+0.8%			
MT	6	6	6	6	+3.4%	6	6	6	6	+4.3%	0	0	0	0	-13.6%			
NL	1 633	1 612	1 599	1 614	+0.9%	1 590	1 569	1 554	1 570	+1.0%	43	43	45	44	-2.2%			
AT	720	715	712	708	-0.5%	524	525	526	551	+4.6%	195	191	186	158	-15.0%			
PL	2 406	2 391	2 289	2 172	-5.1%	2 167	2 126	2 035	2 037	+0.1%	239	266	254	135	-47.0%			
PT	731	739	739	726	-1.8%	234	233	230	224	-2.5%	497	507	509	502	-1.4%			
RO	1 166	1 145	1 116	1 115	-0.1%	1 139	1 122	1 082	1 081	-0.1%	27	23	34	34	+0.6%			
SI	166	167	165	157	-4.8%	101	99	101	93	-7.6%	65	68	65	64	-0.4%			
SK	192	192	191	188	-1.7%	126	122	120	116	-3.4%	66	69	71	72	+1.2%			
FI	318	316	311	306	-1.4%	259	256	249	243	-2.2%	59	61	62	63	+2.0%			
SE	500	499	497	496	-0.1%	301	304	300	298	-0.6%	198	194	197	199	+0.7%			
EU	31 513	31 241	30 778	30 512	-0.9%	20 766	20 522	20 213	20 088	-0.6%	10 748	10 718	10 565	10 424	-1.3%			
UK	3 337					1 867					1 470							

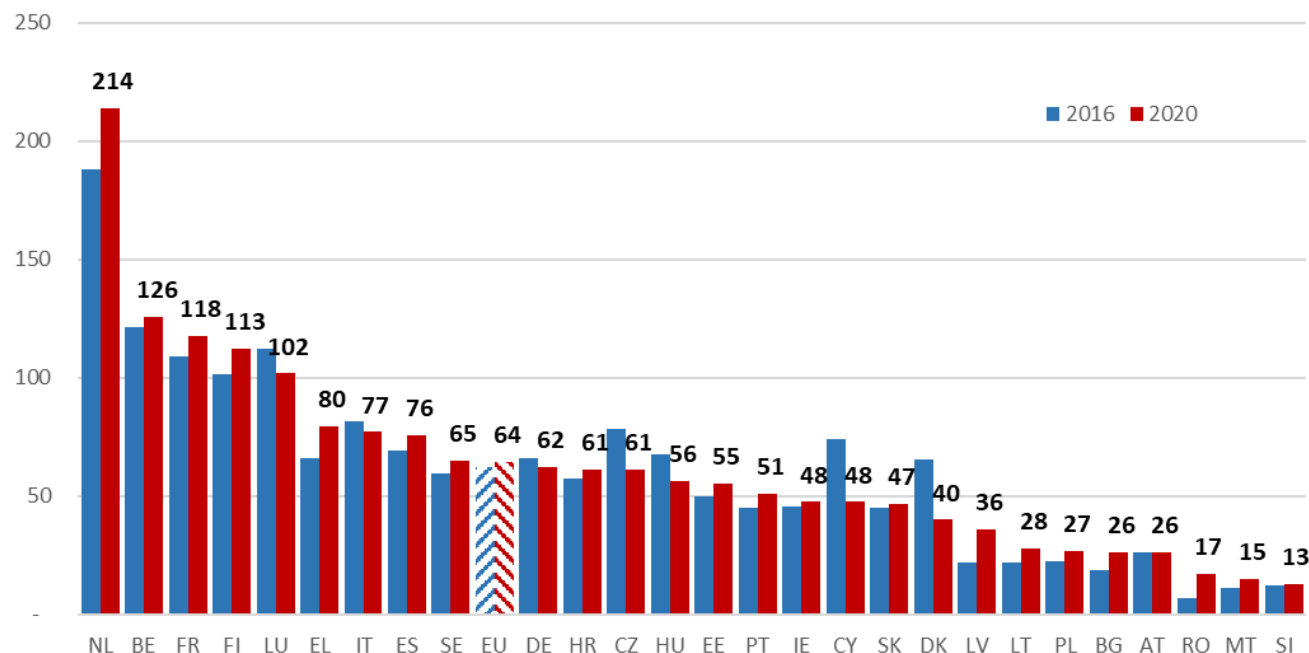
Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2021 AND 2022

EU EVOLUTION
COWS

FARM STRUCTURE SURVEY

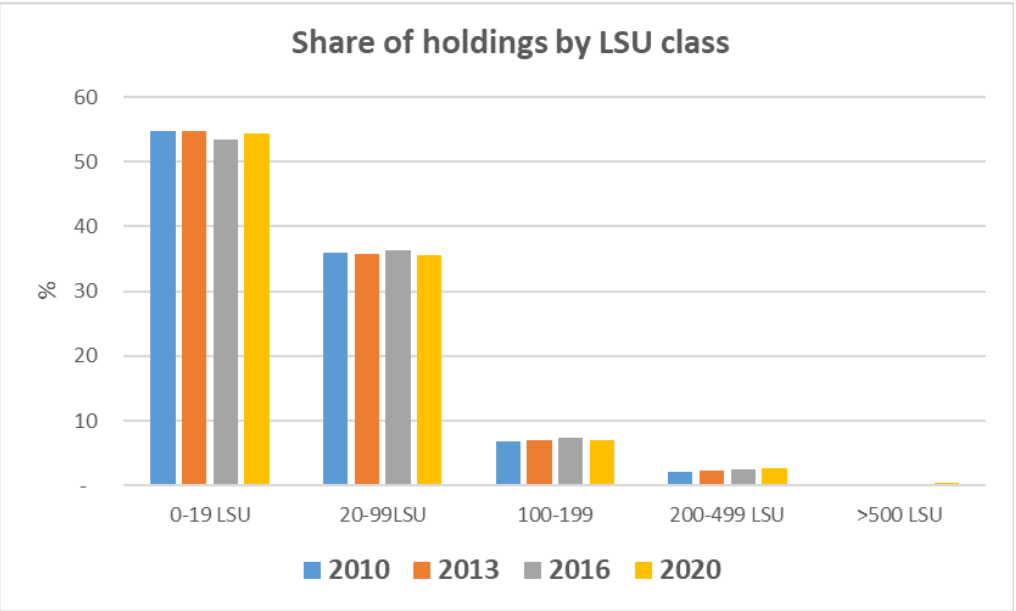
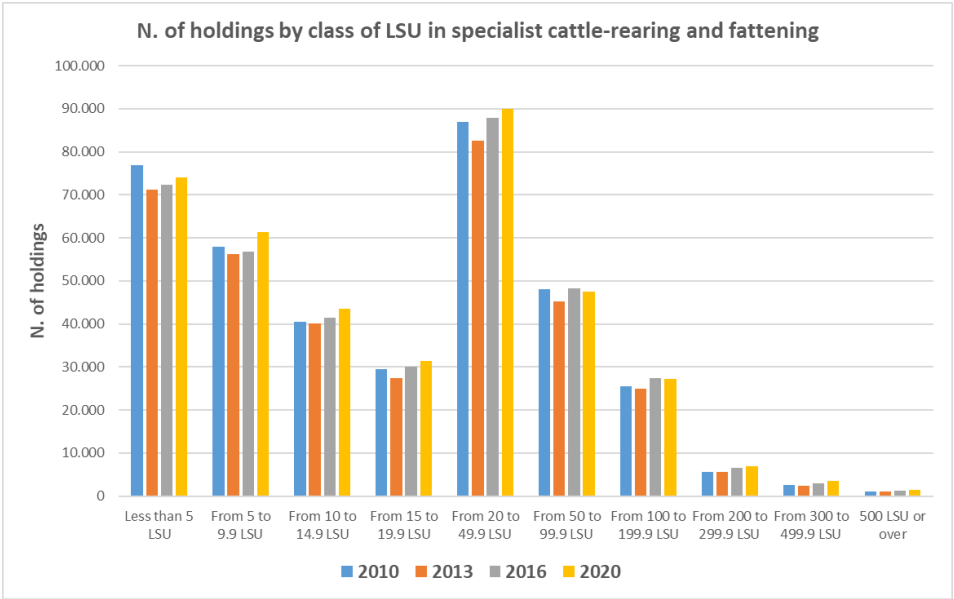
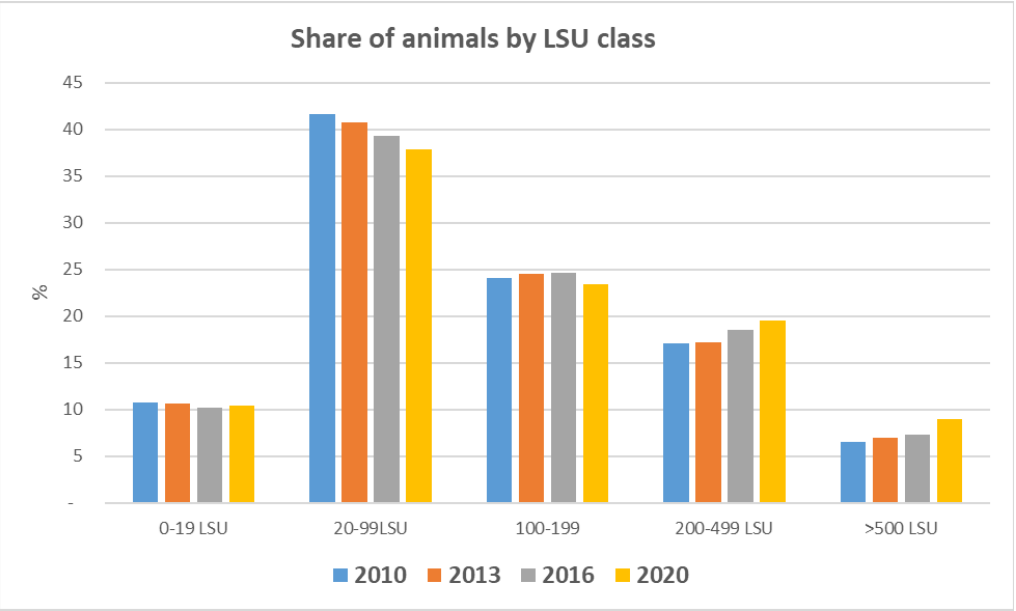
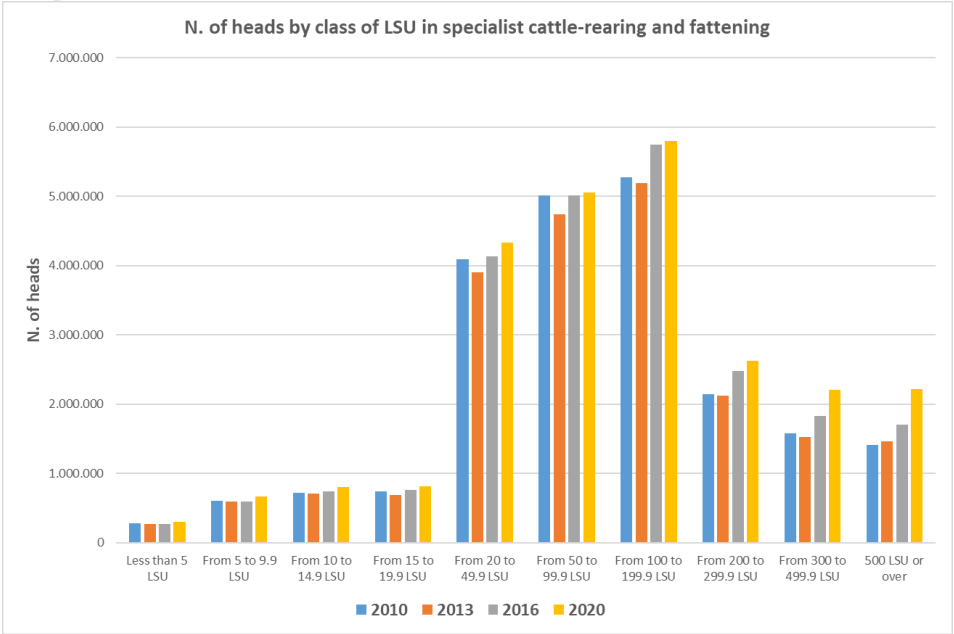
Average Number of Heads of Bovine Animals/Farm in
Specialist Cattle-Rearing and Fattening



Specialist cattle-rearing and fattening - EU

- 386.880 specialised holdings (+3% 20/10)
 - 24.815.240 heads
 - 16.888.990 hectares of UAA
 - 43 hectares on average
 - 1,4 heads/hectare
-
- 11% of the UUA at EU level is used by specialist cattle rearing and fattening

FARM STRUCTURE SURVEY

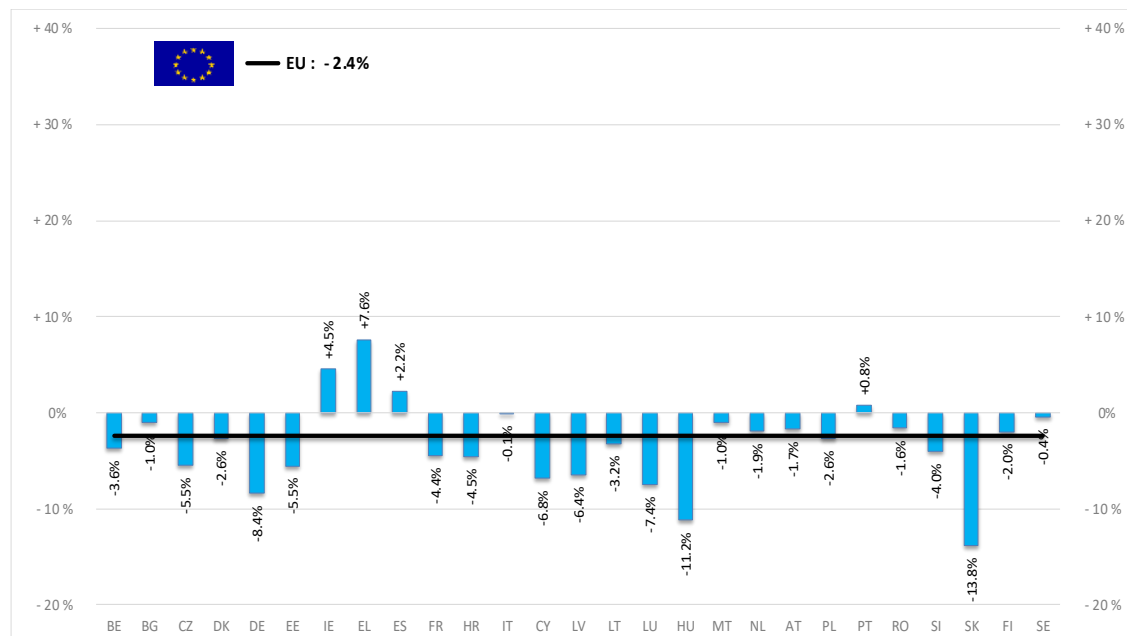


PRODUCTION % EVOLUTION

HEADS	Jan-Dec 22/21	TONNES	Jan-Dec 22/21
	EU		EU
Bull	-3.4%	Bull	-3.2%
Bullock	+2.9%	Bullock	+1.3%
Cow	-1.6%	Cow	-2.6%
Heifer	+0.8%	Heifer	-0.5%
Calve	-1.3%	Calve	-3.0%
Young cattle	-3.8%	Young cattle	-4.9%
Meat of bovine animals	-1.6%	Meat of bovine animals	-2.4%

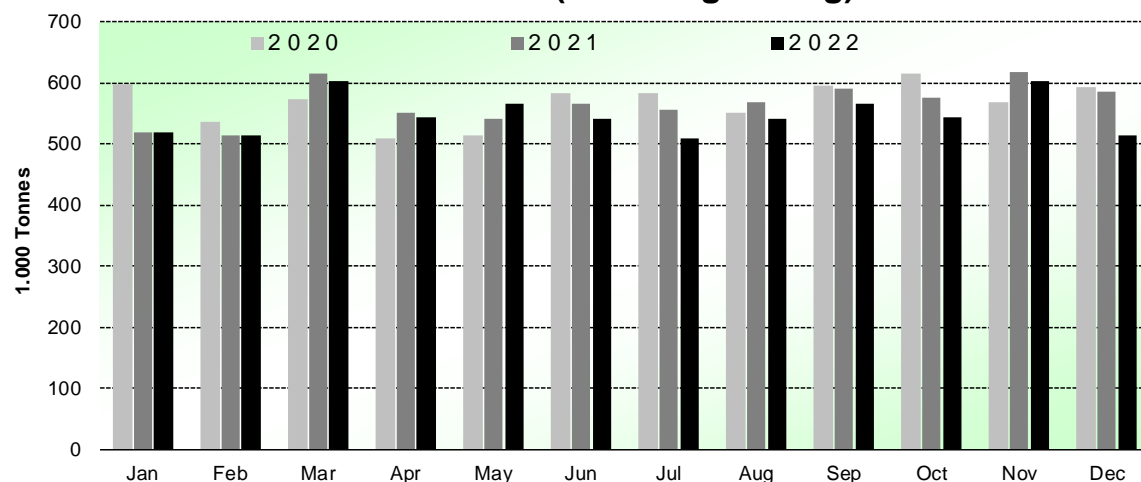
Estimates for last month of period :

Estimates for last month of period :

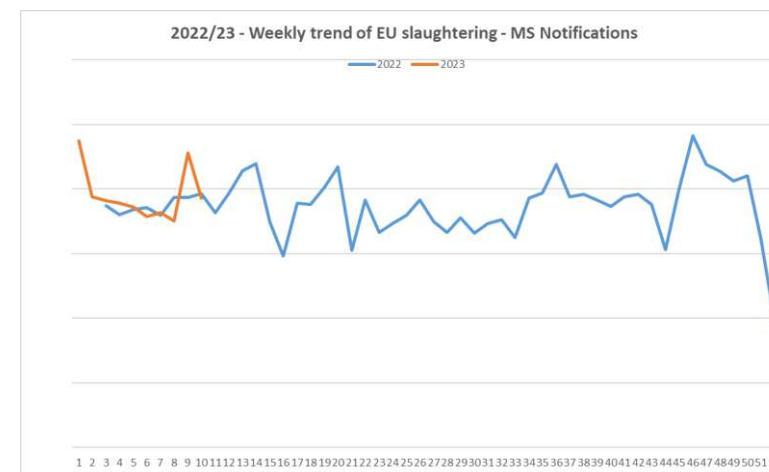


Source : EStat - Newcronos

Beef & Veal Production (EU Slaughtering) - Tonnes



Source : EStat-Newcronos



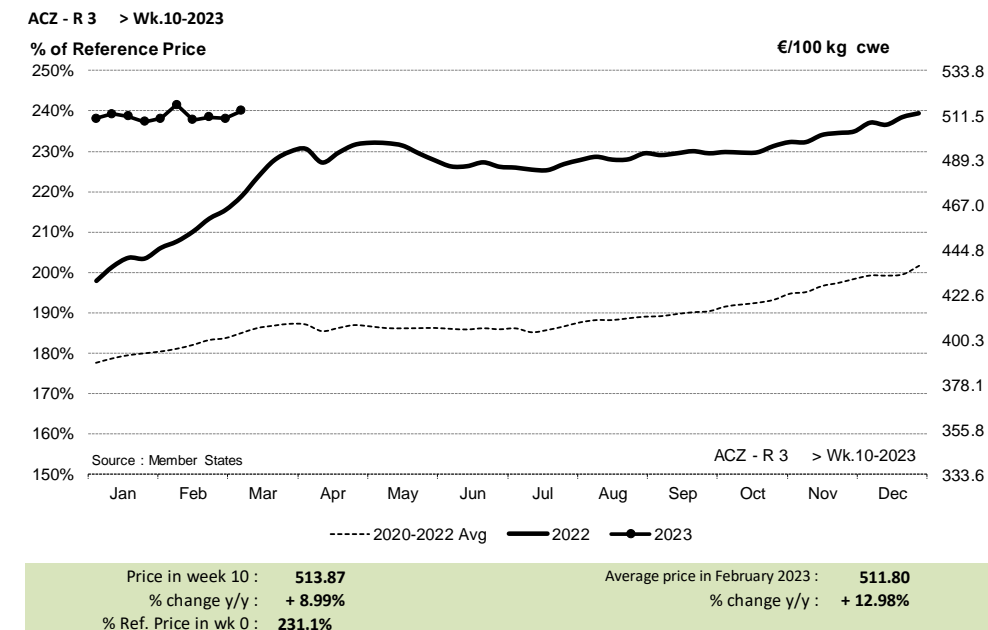
Sources : Member State notifications – Reg.2017/1185

PRICES CARCASSES

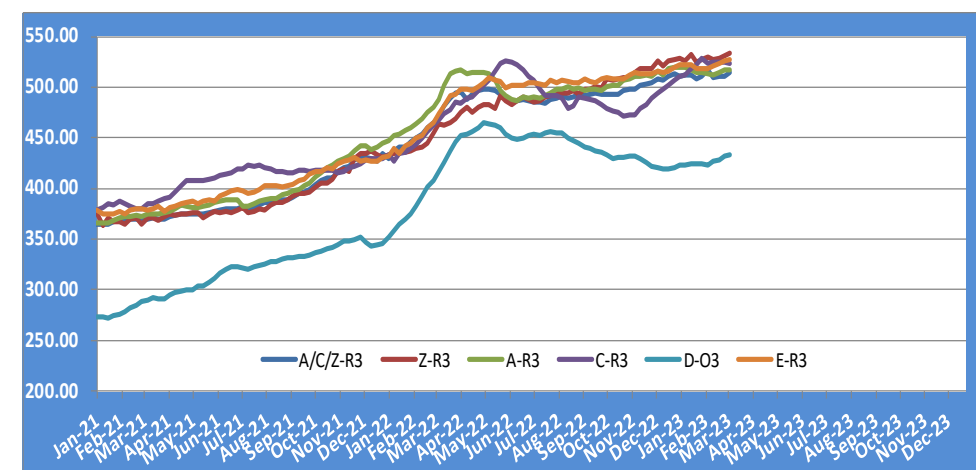
EU Prices week		10	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	513.8	€/100 kg	+ 0.7%	- 0.6%	+ 9.0%
	Young Bovines (Z)	510.7		+ 0.1%	- 7.6%	+ 12.4%
	Young Bulls (A)	510.3		+ 1.1%	+ 1.4%	+ 7.3%
	Steers (C)	538.8		- 0.1%	- 0.1%	+ 13.8%
	Cows (D)	433.2		+ 0.4%	+ 2.3%	+ 4.0%
	Heifers (E)	527.1		+ 0.1%	+ 1.7%	+ 11.4%
Live Animals	Calves slaughtered <8M	654.0	€/head	+ 0.5%	+ 0.3%	+ 12.3%
	Male Calves Dairy Type	111.4		+ 1.4%	+ 5.9%	+ 14.4%
	Male Calves Beef Type	245.4		+ 0.4%	+ 0.1%	+ 5.5%
	Young Store Cattle	3.28		- 0.4%	+ 2.3%	+ 10.6%
	Yearling Male Store Cattle	3.43		+ 0.4%	+ 0.9%	- 6.6%
	Yearling Female Store Cattle	2.85		+ 1.3%	+ 1.8%	+ 3.6%

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

EVOLUTION A/C/Z.R3

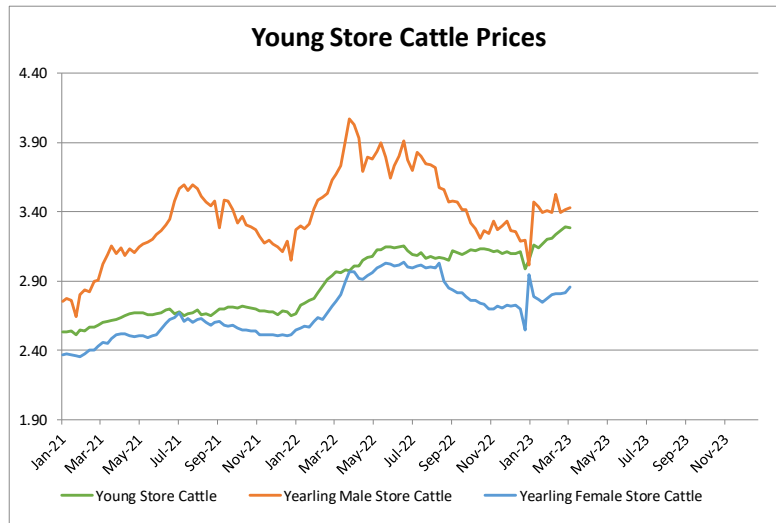


EU EVOLUTION ALL CAT GLOBAL VIEW



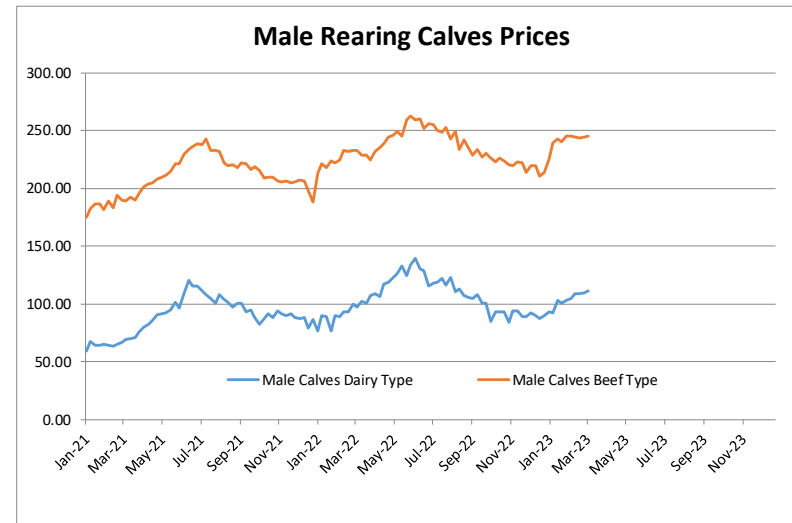
PRICES LIVE BOVINES AND CALVES

Store cattle (€/100 kg live weight)



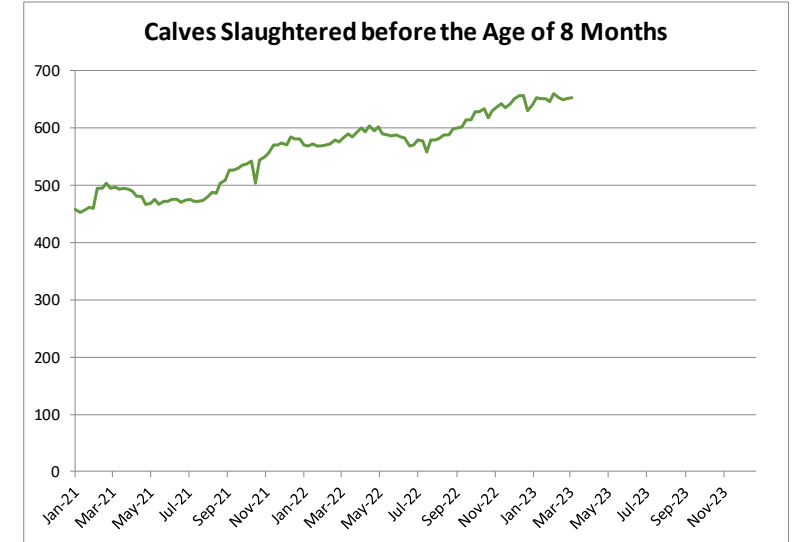
Young Store Cattle Price in	Week 10	3.28	Yearling Male Store Cattle Price	3.43
	Change y/y	+10.6%	Change y/y	-6.6%
Yearling Female Store Cattle Price		2.85		
	Change y/y	+3.6%		

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



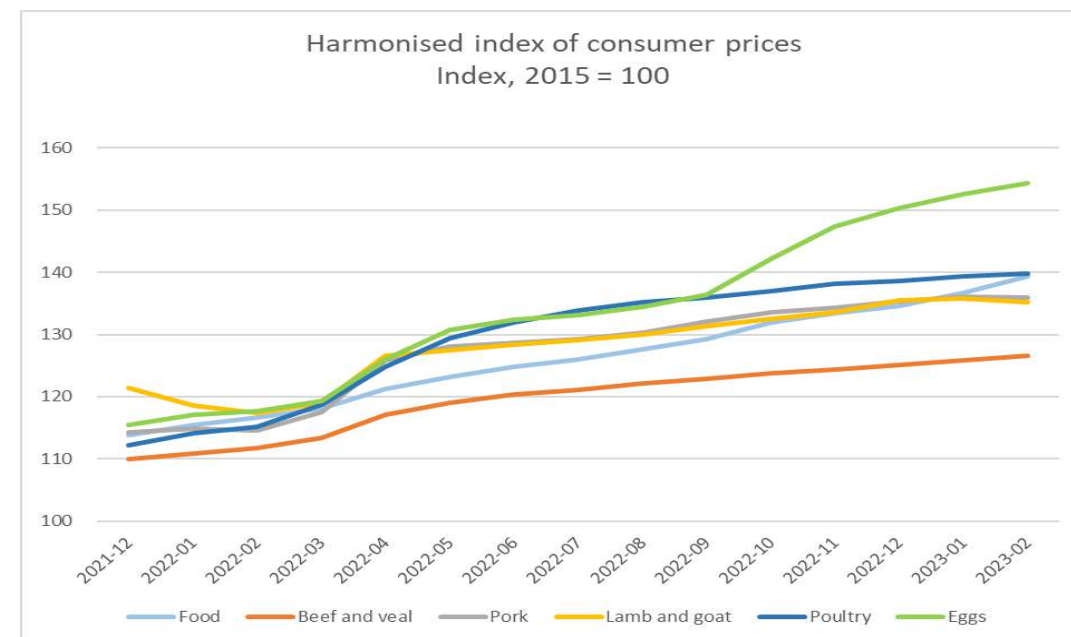
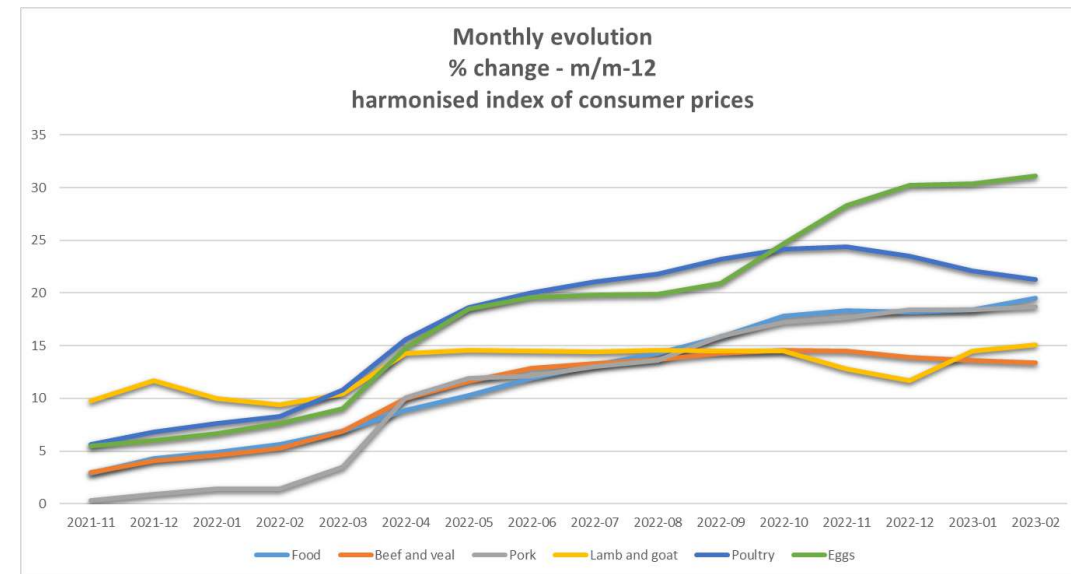
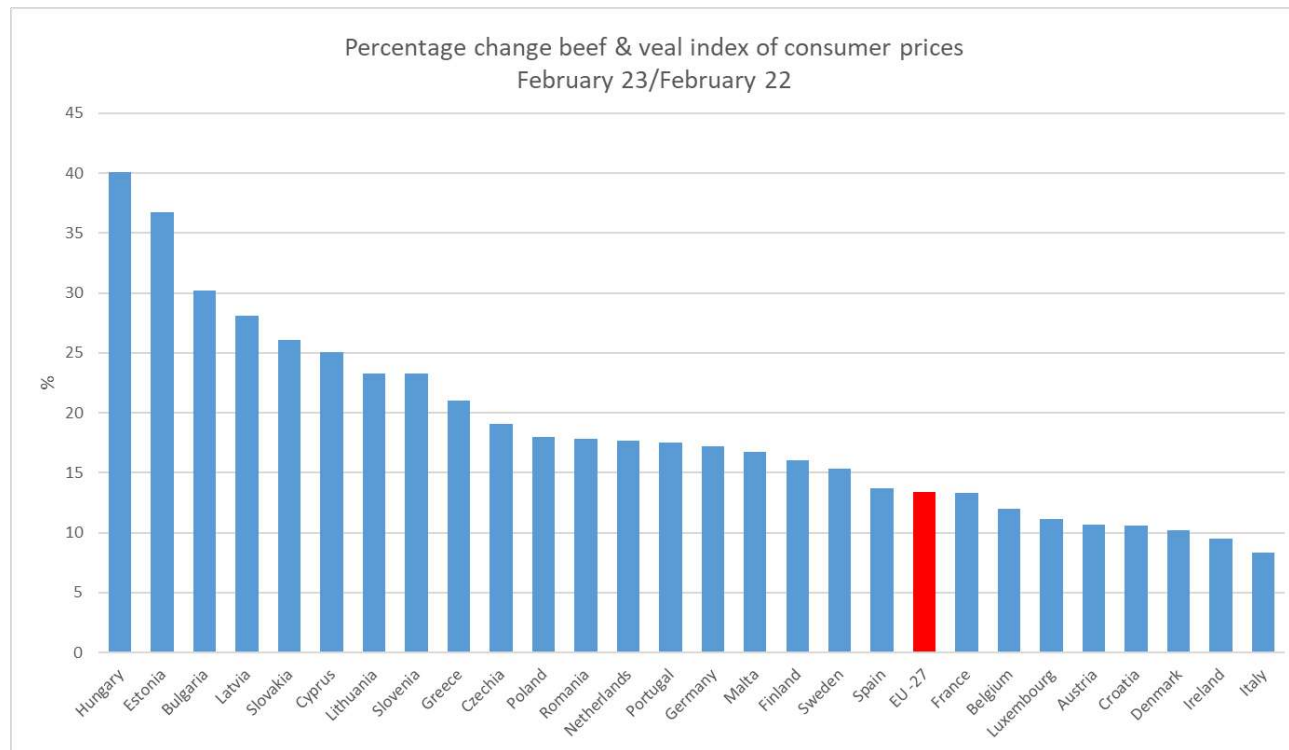
Male Rearing Calves Beef type	Price in Week 10	245.45	Male Rearing Calves Dairy type	Price in Week 10	111.44
	Change y/y	+5.5%		Change y/y	+14.4%

Calves slaughtered less than 8 months (€/100 kg cw)



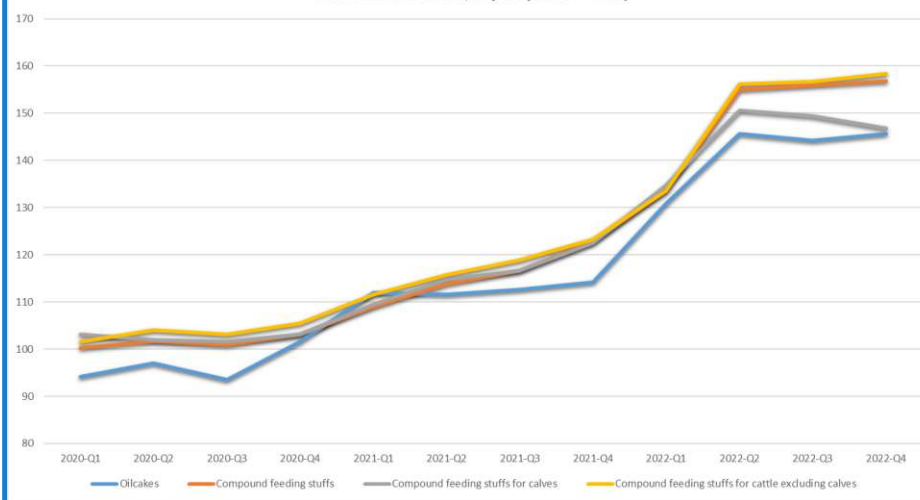
Price in Week 10	654.05 € / 100 kg of carcasse weight
Change y/y	+12.3%

HARMONISED INDEX OF CONSUMERS PRICES

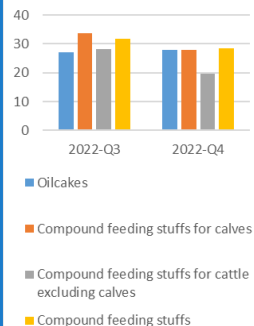


INPUT PRICES – QUARTERLY DATA

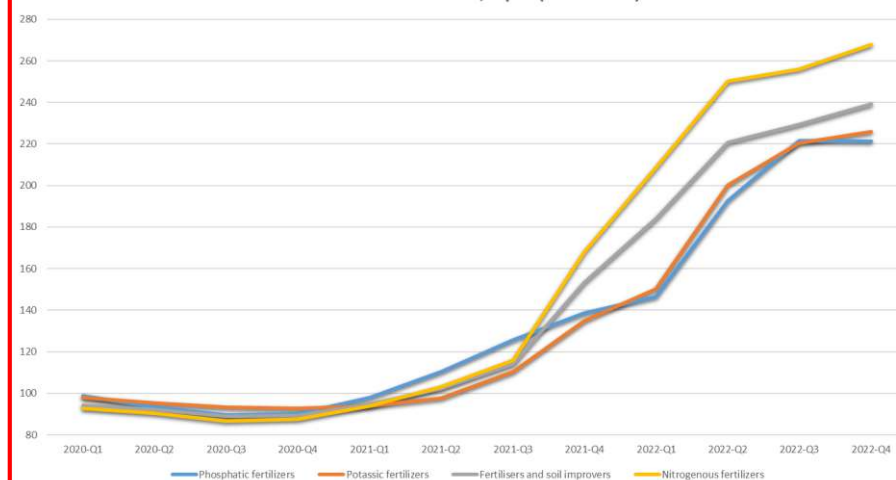
EU -27
Feed Price indices, input (2015 = 100)



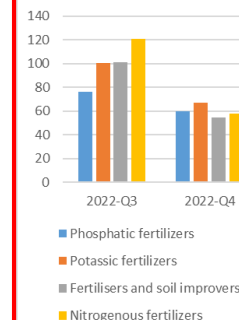
EU -27
Percentage change
feed price Q3 and Q4
2022/2021



EU -27
Fertilisers Price indices, input (2015 = 100)



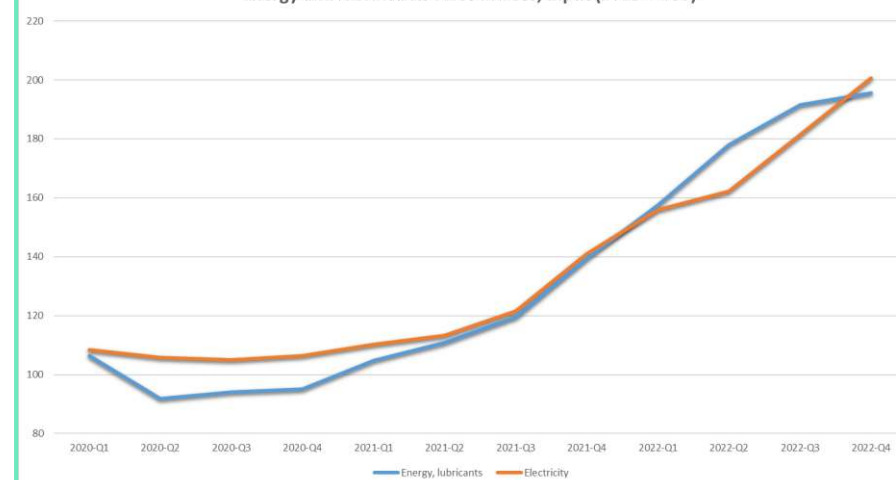
EU -27
Percentage change
fertilisers price Q3
and Q4 2022/2021



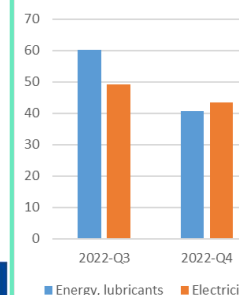
- Feed prices stabilised in the 2nd half of 2022, 20/30% higher that previous year
- Fertilisers prices seen the highest increases, in particular nitrogen fertilisers
- Energy prices 40% above 2021

Source - EUROSTAT

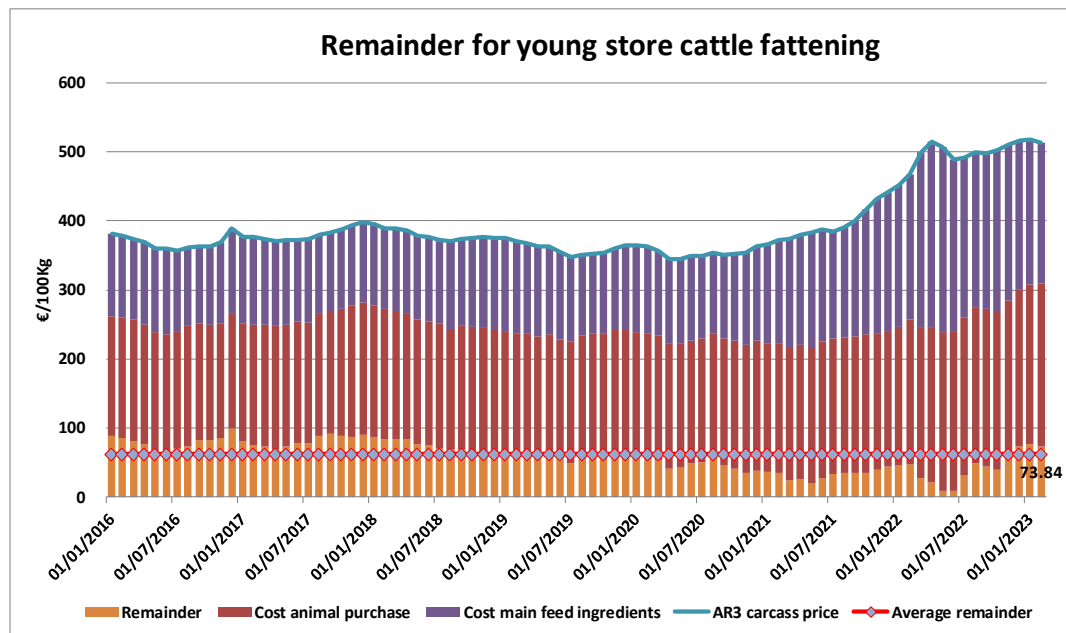
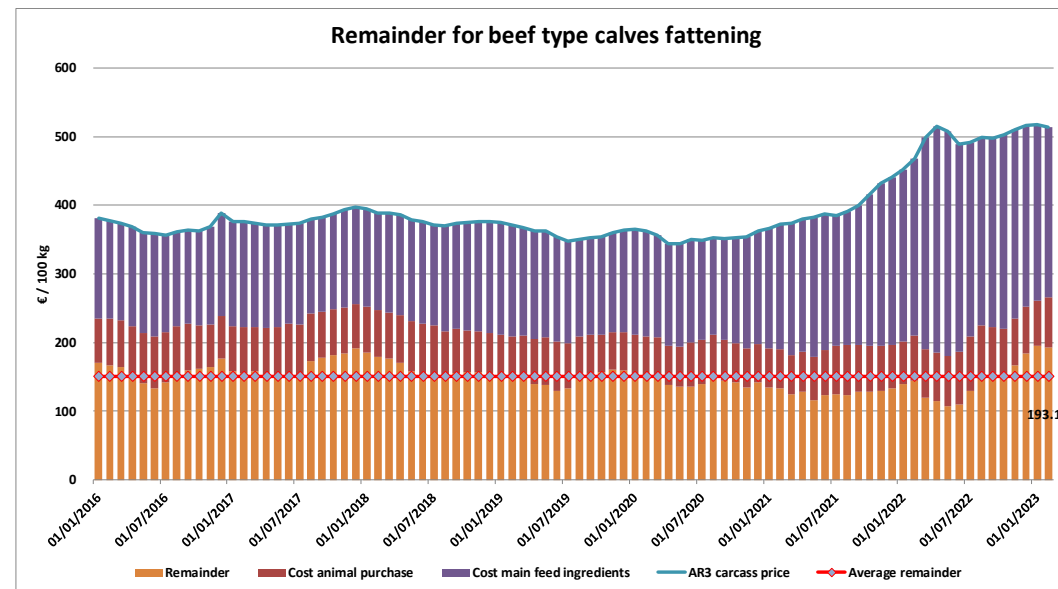
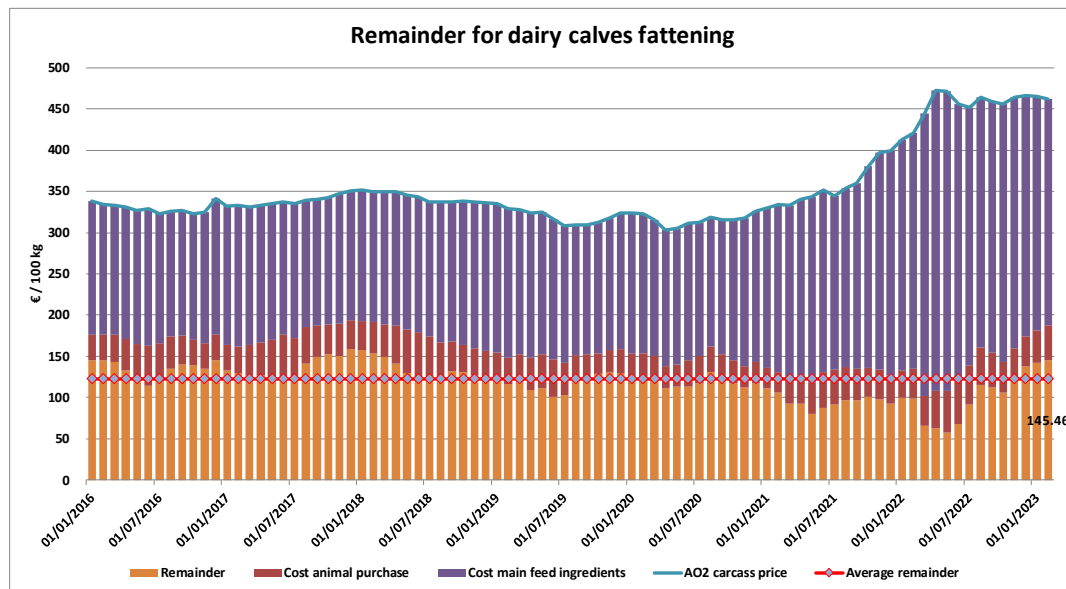
EU -27
Energy and lubricants Price indices, input (2015 = 100)



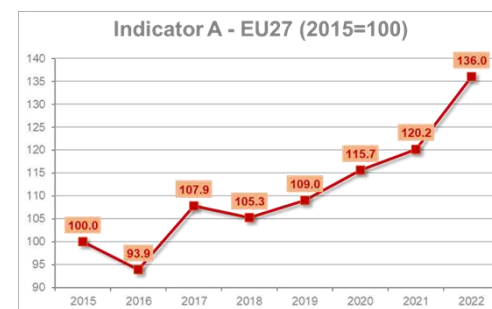
EU -27
Percentage change
energy and
lubricants price Q3
and Q4 2022/2021



REMAINDERS



EUROSTAT (preliminary) data on agricultural income confirms the positive performance of the sector in 2022 despite the high input prices, compensated by the unprecedented rise of producer prices.



index of real agricultural factor income per annual work unit; 2015=100

+13%

TRADE

EU EXPORTS

Beef & Live Animals

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

In Tons of Carcase Weight

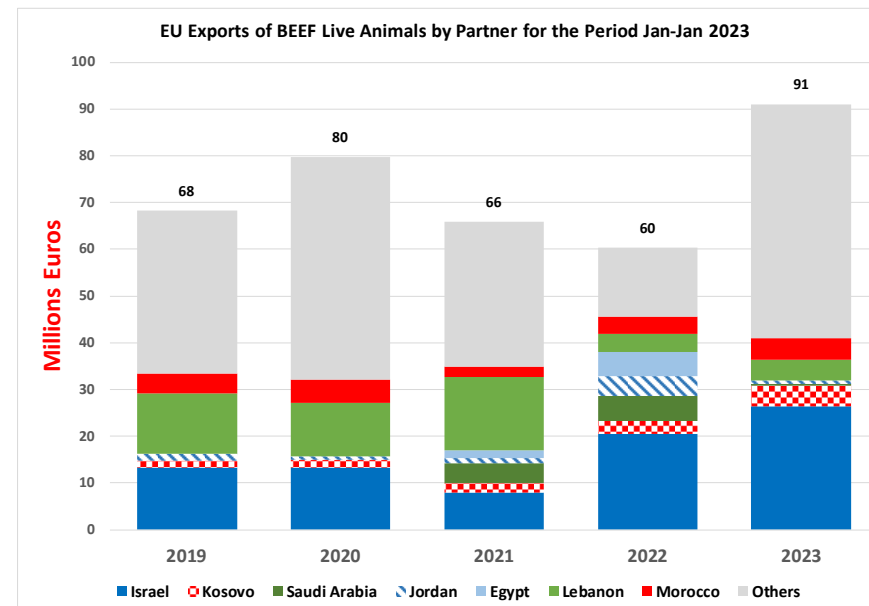
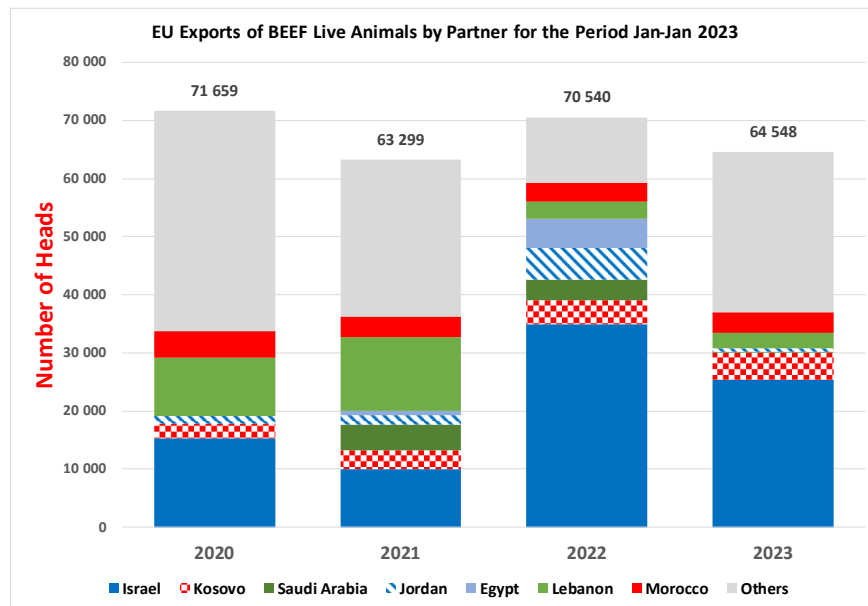
Destinations	2020		2021		Jan to Dec 2022		Compared to Jan to Dec 2021
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	450 442	39.5%	344 634	33.4%	382 385	39.9%	+11.0%
Israel	56 139	4.9%	66 022	6.4%	63 598	6.6%	-3.7%
Bosnia-Herz.	34 896	3.1%	40 504	3.9%	38 342	4.0%	-5.3%
Ghana	47 344	4.2%	47 618	4.6%	31 762	3.3%	-33.3%
Ivory Coast	32 433	2.8%	29 187	2.8%	29 879	3.1%	+2.4%
Philippines	33 650	3.0%	34 666	3.4%	29 703	3.1%	-14.3%
Algeria	39 396	3.5%	24 111	2.3%	25 206	2.6%	+4.5%
Switzerland	26 223	2.3%	28 717	2.8%	25 004	2.6%	-12.9%
Lebanon	33 709	3.0%	19 527	1.9%	21 021	2.2%	+7.6%
Japan	11 885	1.0%	21 888	2.1%	19 926	2.1%	-9.0%
Canada	20 450	1.8%	20 670	2.0%	19 795	2.1%	-4.2%
Other Destinations	352 811	31.0%	353 429	34.3%	271 367	28.3%	-23.2%
Extra-EU	1 139 378		1 030 975		957 988		-7.1%
% Change				-9.5%			

In Thousand Euros

	2020		2021		Jan to Dec 2022		Compared to Jan to Dec 2021
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	1 508 333	40.2%	1 492 368	38.4%	1 775 502	41.6%	+19.0%
Israel	266 074	7.1%	328 295	8.4%	377 934	8.8%	+15.1%
Bosnia-Herz.	96 620	2.6%	126 443	3.3%	158 868	3.7%	+25.6%
Ghana	43 585	1.2%	47 987	1.2%	35 528	0.8%	-26.0%
Ivory Coast	21 626	0.6%	25 645	0.7%	25 506	0.6%	-0.5%
Philippines	61 861	1.6%	73 028	1.9%	81 058	1.9%	+11.0%
Algeria	193 457	5.2%	111 646	2.9%	169 996	4.0%	+52.3%
Switzerland	142 125	3.8%	171 272	4.4%	188 976	4.4%	+10.3%
Lebanon	131 329	3.5%	80 664	2.1%	110 001	2.6%	+36.4%
Japan	43 177	1.1%	98 109	2.5%	119 577	2.8%	+21.9%
Canada	65 044	1.7%	73 352	1.9%	85 228	2.0%	+16.2%
Other Destinations	1 182 539	31.5%	1 257 757	32.4%	1 143 792	26.8%	-9.1%
Extra-EU	3 755 769		3 886 567		4 271 967		+9.9%
% Change				+3.5%			

TRADE

EU EXPORTS Live Animals



TRADE

EU IMPORTS Beef & Live Animals

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

In Tons of Carcase Weight

Origins	2020		2021		Jan to Dec 2022		Compared to Jan to Dec 2021
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	120 733	35.1%	87 599	28.3%	136 996	35.8%	+56.4%
Brazil	84 139	24.4%	81 737	26.4%	86 571	22.6%	+5.9%
Argentina	56 421	16.4%	52 300	16.9%	63 914	16.7%	+22.2%
Uruguay	34 611	10.0%	42 669	13.8%	38 299	10.0%	-10.2%
USA	16 532	4.8%	14 910	4.8%	18 315	4.8%	+22.8%
Australia	11 058	3.2%	8 925	2.9%	8 900	2.3%	-0.3%
New Zealand	6 116	1.8%	4 380	1.4%	5 551	1.4%	+26.7%
Paraguay	4 234	1.2%	3 933	1.3%	5 404	1.4%	+37.4%
Namibia	1 445	0.4%	1 996	0.6%	5 168	1.3%	+++
Switzerland	4 187	1.2%	4 714	1.5%	4 729	1.2%	+0.3%
Japan	789	0.2%	1 478	0.5%	2 893	0.8%	+95.7%
Other Destinations	4 130	1.2%	4 628	1.5%	6 233	1.6%	+34.7%
Extra-EU	344 393		309 270		382 972		+23.8%
% Change				-10.2%			

In Thousand Euros

	2020		2021		Jan to Dec 2022		Compared to Jan to Dec 2021
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	483 251	26.5%	359 675	20.1%	542 292	21.4%	+50.8%
Brazil	377 626	20.7%	387 194	21.7%	542 953	21.4%	+40.2%
Argentina	358 357	19.7%	376 658	21.1%	556 601	21.9%	+47.8%
Uruguay	210 062	11.5%	246 910	13.8%	326 364	12.9%	+32.2%
USA	154 464	8.5%	156 708	8.8%	221 911	8.7%	+41.6%
Australia	91 489	5.0%	90 481	5.1%	105 803	4.2%	+16.9%
New Zealand	41 142	2.3%	31 669	1.8%	50 582	2.0%	+59.7%
Paraguay	20 834	1.1%	20 419	1.1%	35 585	1.4%	+74.3%
Namibia	5 725	0.3%	6 902	0.4%	24 570	1.0%	+++
Switzerland	44 984	2.5%	53 477	3.0%	55 346	2.2%	+3.5%
Japan	10 314	0.6%	25 588	1.4%	33 792	1.3%	+32.1%
Other Destinations	24 052	1.3%	30 301	1.7%	41 216	1.6%	+36.0%
Extra-EU	1 822 301		1 785 984		2 537 016		+42.1%
% Change				-2.0%			

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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