

BEEF & VEAL MARKET SITUATION



Meat Market Observatory
2 October 2018

LIVESTOCK

JUNE SURVEY

May/Jun 1000 Hd	TOT 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	2 531	2 555	2 454	2 450	-0.2%	744	750	717	710	-0.9%	504	512	500	492	-1.6%	1 283	1 293	1 237	1 247	+0.8%
BG																				
CZ																				
DK	1 568	1 583	1 565	1 560	-0.3%	524	547	527	538	+2.1%	316	307	311	294	-5.5%	728	730	727	729	+0.3%
DE	12 653	12 563	12 366	12 093	-2.2%	3 846	3 805	3 723	3 618	-2.8%	3 002	2 983	2 948	2 848	-3.4%	5 805	5 775	5 694	5 627	-1.2%
EE																				
IE	6 964	7 221	7 364	7 349	-0.2%	2 042	2 126	2 131	2 078	-2.5%	1 705	1 853	1 914	1 919	+0.2%	3 216	3 242	3 319	3 351	+1.0%
EL																				
ES	6 234	6 451	6 588	6 725	+2.1%	2 281	2 413	2 480	2 504	+1.0%	898	896	927	990	+6.8%	3 055	3 141	3 181	3 230	+1.5%
FR	19 463	19 559	19 433	18 963	-2.4%	5 603	5 638	5 542	5 258	-5.1%	3 540	3 561	3 523	3 446	-2.2%	10 319	10 362	10 367	10 258	-1.0%
HR																				
IT	6 146	6 183	6 118	6 170	+0.8%	1 670	1 702	1 723	1 757	+1.9%	1 370	1 502	1 472	1 466	-0.4%	3 107	2 979	2 923	2 948	+0.9%
CY																				
LV																				
LT																				
LU																				
HU																				
MT																				
NL	4 134	4 245	4 096	3 918	-4.4%	1 624	1 692	1 602	1 569	-2.1%	672	630	600	523	-12.9%	1 838	1 923	1 893	1 825	-3.6%
AT	1 950	1 933	1 938	1 907	-1.6%	622	605	620	606	-2.3%	437	441	431	433	+0.4%	891	887	888	869	-2.2%
PL	5 961	5 939	6 143	6 201	+0.9%	1 669	1 728	1 721	1 686	-2.0%	1 529	1 576	1 701	1 734	+1.9%	2 763	2 635	2 721	2 781	+2.2%
PT		1 664	1 722				521	537				264	281				879	904		
RO	2 078	2 081	2 012	2 002	-0.5%	477	481	454	444	-2.2%	235	240	229	236	+2.8%	1 366	1 360	1 329	1 322	-0.5%
SI																				
SK																				
FI																				
SE	1 476	1 489	1 501	1 507	+0.4%	466	475	472	475	+0.6%	372	375	385	381	-1.1%	638	639	644	652	+1.1%
UK	9 919	10 033	10 004	9 891	-1.1%	2 912	2 989	2 940	2 908	-1.1%	2 380	2 474	2 516	2 479	-1.5%	4 626	4 569	4 548	4 504	-1.0%
EU	81 076	83 499	83 305	80 735	-1.0%	24 481	25 473	25 190	24 152	-2.0%	16 959	17 613	17 740	17 240	-1.3%	39 635	40 414	40 375	39 344	-0.3%

Source : EStat Newcronos

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

2 October 2018

LIVESTOCK

EU EVOLUTION TOTAL BOVINE

JUNE SURVEY

May/Jun 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	987	1 005	970	968	-0.3%	524	536	521	532	+2.1%	463	469	449	435	-3.0%
BG															
CZ															
DK	661	669	665	667	+0.3%	561	572	570	575	+0.9%	99	97	95	91	-4.2%
DE	4 969	4 957	4 885	4 830	-1.1%	4 287	4 272	4 214	4 167	-1.1%	682	685	670	663	-1.1%
EE															
IE	2 372	2 502	2 514	2 529	+0.6%	1 296	1 398	1 433	1 481	+3.4%	1 076	1 104	1 081	1 048	-3.1%
EL															
ES	2 678	2 801	2 832	2 865	+1.2%	853	827	825	825	+0.0%	1 825	1 973	2 007	2 040	+1.7%
FR	7 809	7 838	7 811	7 684	-1.6%	3 606	3 576	3 552	3 509	-1.2%	4 203	4 263	4 259	4 175	-2.0%
HR															
IT	2 375	2 245	2 187	2 192	+0.2%	2 061	1 948	1 907	1 904	-0.1%	314	297	280	288	+2.9%
CY															
LV															
LT															
LU															
HU															
MT															
NL	1 702	1 811	1 753	1 693	-3.4%	1 622	1 743	1 694	1 630	-3.8%	80	68	59	63	+7.0%
AT	762	755	755	740	-2.0%	540	536	540	538	-0.4%	222	218	215	202	-5.8%
PL	2 444	2 332	2 374	2 429	+2.3%	2 279	2 146	2 154	2 233	+3.7%	165	186	220	196	-10.9%
PT		736	747				246	244				490	504		
RO	1 233	1 228	1 199	1 197	-0.2%	1 216	1 216	1 184	1 184	+0.1%	17	12	15	12	-19.5%
SI															
SK															
FI															
SE	523	524	530	534	+0.8%	338	331	322	319	-0.8%	184	194	208	215	+3.3%
UK	3 472	3 493	3 481	3 441	-1.1%	1 895	1 897	1 891	1 883	-0.4%	1 576	1 596	1 589	1 558	-2.0%
EU	31 987	32 895	32 702	31 769	-0.6%	21 078	21 243	21 050	20 781	-0.1%	10 907	11 652	11 651	10 987	-1.4%

Source : EStat Newcronos

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

2 October 2018

LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION TOTAL BOVINE

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2017 2016	BOVINE < 1 Year				%Var 2017 2016	BOVINE 1-2 Year				%Var 2017 2016	BOVINE > 2 Year				%Var 2017 2016
	2014	2015	2016	2017		2014	2015	2016	2017		2014	2015	2016	2017		2014	2015	2016	2017	
BE	2 477	2 503	2 501	2 386	-4.6%	745	749	748	700	-6.5%	490	493	492	484	-1.6%	1 243	1 261	1 261	1 202	-4.7%
BG	562	561	570	552	-3.1%	121	109	120	110	-8.4%	65	64	63	57	-10.2%	376	388	387	386	-0.4%
CZ	1 373	1 366	1 340	1 366	+2.0%	413	403	397	407	+2.4%	311	309	295	299	+1.4%	649	654	648	660	+2.0%
DK	1 553	1 566	1 554	1 558	+0.3%	534	538	540	541	+0.2%	307	302	298	294	-1.3%	713	726	715	723	+1.1%
DE	12 742	12 635	12 467	12 281	-1.5%	3 909	3 836	3 795	3 704	-2.4%	3 011	2 993	2 960	2 904	-1.9%	5 823	5 806	5 712	5 673	-0.7%
EE	265	256	248	251	+1.2%	73	70	68	70	+2.5%	54	53	50	49	-2.0%	138	133	130	133	+1.8%
IE	6 243	6 422	6 613	6 674	+0.9%	1 886	2 026	2 077	2 087	+0.5%	1 649	1 660	1 778	1 792	+0.8%	2 709	2 737	2 759	2 795	+1.3%
EL	659	582	554	555	+0.2%	176	154	145	140	-3.4%	119	103	102	107	+4.9%	365	325	306	308	+0.7%
ES	6 079	6 183	6 318	6 467	+2.4%	2 302	2 325	2 404	2 492	+3.7%	746	786	804	822	+2.3%	3 031	3 072	3 110	3 153	+1.4%
FR	19 271	19 406	19 004	18 580	-2.2%	5 546	5 618	5 138	4 844	-5.7%	3 418	3 461	3 493	3 400	-2.7%	10 307	10 327	10 372	10 336	-0.3%
HR	441	455	462	470	+1.7%	132	148	154	156	+1.3%	88	88	89	99	+11.2%	221	219	219	215	-1.8%
IT			6 315	6 350	+0.6%	1 654	1 678	1 745	1 738	-0.4%	1 366	1 379	1 448	1 501	+3.6%	3 106	3 099	3 122	3 111	-0.3%
CY	60	59	63	67	+6.0%	22	21	22	23	+7.0%	10	9	10	11	+9.5%	28	29	32	33	+4.3%
LV	422	419	412	406	-1.6%	118	114	113	108	-4.2%	75	76	73	70	-3.9%	229	229	227	228	+0.5%
LT	737	723	695	676	-2.7%	192	185	179	180	+0.5%	149	152	143	135	-5.5%	395	385	373	362	-3.1%
LU	201	201	202	198	-2.1%	54	54	54	50	-7.1%	47	45	44	44	-0.3%	100	102	104	103	-0.3%
HU	802	821	852	870	+2.1%	219	220	239	243	+1.7%	176	180	176	179	+1.7%	407	421	438	448	+2.3%
MT	15	15	14	14	-1.3%	4	4	4	4	+7.7%	3	4	3	3	-3.4%	7	7	7	7	-4.9%
NL	4 169	4 315	4 294	4 030	-6.1%	1 676	1 707	1 666	1 594	-4.3%	657	660	644	575	-10.7%	1 836	1 948	1 985	1 860	-6.3%
AT	1 961	1 958	1 954	1 943	-0.6%	629	624	632	624	-1.4%	432	439	432	439	+1.5%	899	894	890	881	-1.0%
PL	5 660	5 763	5 970	6 036	+1.1%	1 450	1 617	1 718	1 713	-0.3%	1 445	1 532	1 637	1 669	+1.9%	2 765	2 614	2 615	2 654	+1.5%
PT	1 549	1 606	1 635	1 670	+2.1%	487	510	499	515	+3.1%	214	240	267	256	-4.1%	848	856	869	900	+3.5%
RO	2 069	2 092	2 050	1 989	-2.9%	463	475	447	431	-3.6%	254	261	251	244	-2.8%	1 352	1 357	1 352	1 315	-2.8%
SI	468	484	489	480	-1.9%	148	153	155	153	-1.2%	122	129	131	128	-1.8%	198	202	203	198	-2.4%
SK	466	457	446	440	-1.4%	130	130	130	125	-4.4%	93	91	84	84	+0.0%	243	236	231	231	-0.2%
FI	907	903	887	875	-1.4%	307	308	302	299	-1.1%	223	221	218	213	-2.5%	378	374	367	363	-1.1%
SE	1 436	1 428	1 436	1 449	+0.9%	473	467	468	474	+1.3%	334	342	344	342	-0.6%	629	619	624	633	+1.4%
UK	9 693	9 816	9 806	9 791	-0.2%	2 842	2 967	2 952	2 944	-0.3%	2 332	2 372	2 435	2 435	idem	4 520	4 477	4 419	4 412	-0.2%
EU	82 280	82 996	89 152	88 424	-0.8%	26 705	27 209	26 911	26 468	-1.6%	18 189	18 445	18 764	18 635	-0.7%	43 514	43 498	43 476	43 320	-0.4%

Source : EStat Newcrons

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

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LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION

COWS

Dec	TOTAL COWS				%Var 2017 2016	DAIRY COWS				%Var 2017 2016	OTHER COWS				%Var 2017 2016
1000 Hd	2014	2015	2016	2017		2014	2015	2016	2017		2014	2015	2016	2017	
BE	956	974	988	938	-5.1%	519	529	531	519	-2.2%	436	445	457	419	-8.4%
BG	351	359	365	357	-2.2%	302	283	279	260	-6.7%	49	76	86	97	+12.4%
CZ	566	566	561	571	+1.9%	372	369	367	365	-0.5%	194	197	193	206	+6.4%
DK	643	664	657	664	+1.1%	547	570	565	575	+1.8%	96	94	92	89	-3.3%
DE	4 969	4 966	4 887	4 859	-0.6%	4 296	4 285	4 218	4 199	-0.4%	674	681	670	660	-1.4%
EE	118	116	114	116	+1.8%	96	91	86	86	+0.3%	23	25	28	30	+6.1%
IE	2 169	2 293	2 337	2 362	+1.0%	1 128	1 240	1 295	1 343	+3.7%	1 041	1 053	1 042	1 018	-2.3%
EL	305	274	241	244	+1.2%	135	111	106	103	-2.8%	169	163	135	141	+4.4%
ES	2 669	2 763	2 785	2 823	+1.4%	845	844	834	824	-1.3%	1 824	1 919	1 950	1 999	+2.5%
FR	7 841	7 872	7 856	7 745	-1.4%	3 699	3 661	3 630	3 595	-1.0%	4 142	4 211	4 225	4 151	-1.8%
HR	180	171	167	161	-3.6%	159	152	147	139	-5.4%	21	19	20	22	+10.0%
IT			2 365	2 338	-1.1%			2 060	2 040	-1.0%			305	298	-2.2%
CY	25	26	29	30	+6.2%	25	26	28	30	+6.2%	0	0	0	0	-7.1%
LV	200	201	199	199	+0.1%	166	162	154	150	-2.4%	34	39	45	49	+8.8%
LT	351	343	333	323	-3.1%	314	301	286	273	-4.5%	37	43	47	50	+5.7%
LU	75	77	80	78	-1.7%	47	49	52	52	+0.3%	29	28	28	26	-5.4%
HU	359	368	383	395	+3.1%	255	250	244	244	idem	104	117	138	151	+9.4%
MT	7	7	7	6	-5.1%	7	6	7	6	-5.5%	0	0	0	0	+16.7%
NL	1 694	1 802	1 864	1 723	-7.6%	1 610	1 717	1 794	1 665	-7.2%	84	85	70	58	-17.1%
AT	768	758	757	750	-0.8%	538	534	540	543	+0.7%	230	224	217	207	-4.5%
PL	2 403	2 303	2 304	2 341	+1.6%	2 248	2 134	2 130	2 153	+1.1%	155	169	174	188	+8.2%
PT	697	719	724	728	+0.6%	234	243	239	239	-0.1%	463	476	485	490	+1.0%
RO	1 207	1 207	1 204	1 171	-2.8%	1 188	1 191	1 193	1 159	-2.8%	18	17	12	12	-1.7%
SI	168	170	171	169	-1.5%	108	113	108	109	+0.9%	60	57	64	60	-5.7%
SK	202	200	194	195	+0.3%	143	139	133	130	-2.1%	59	60	62	65	+5.3%
FI	340	339	333	329	-1.2%	283	282	275	271	-1.7%	57	57	57	58	+1.1%
SE	517	513	514	522	+1.7%	344	337	326	323	-0.8%	173	176	188	199	+6.0%
UK	3 419	3 469	3 451	3 444	-0.2%	1 883	1 918	1 898	1 902	+0.2%	1 536	1 551	1 554	1 542	-0.8%
EU	33 198	33 521	35 868	35 581	-0.8%	21 489	21 537	23 525	23 299	-1.0%	11 708	11 983	12 342	12 283	-0.5%

Source : EStat Newcronos

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

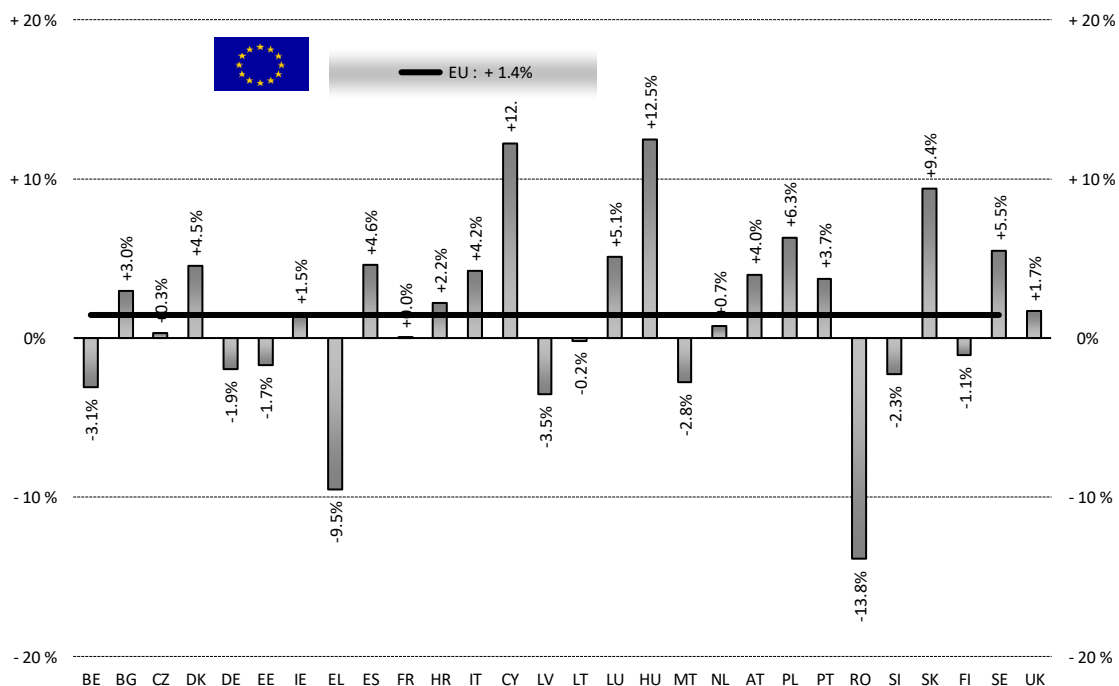
2 October 2018

PRODUCTION

% EVOLUTION HEADS

HEADS	Jan-Jun 18/17	
	EU15	EU28
Bull	+0.0%	+1.6%
Bullock	-0.8%	-0.9%
Cow	+1.4%	+1.0%
Heifer	+6.2%	+6.0%
Calve	+0.2%	+0.2%
Young cattle	-1.9%	-1.9%
Meat of bovine animals	+1.2%	+1.4%

Estimates for last month of period :



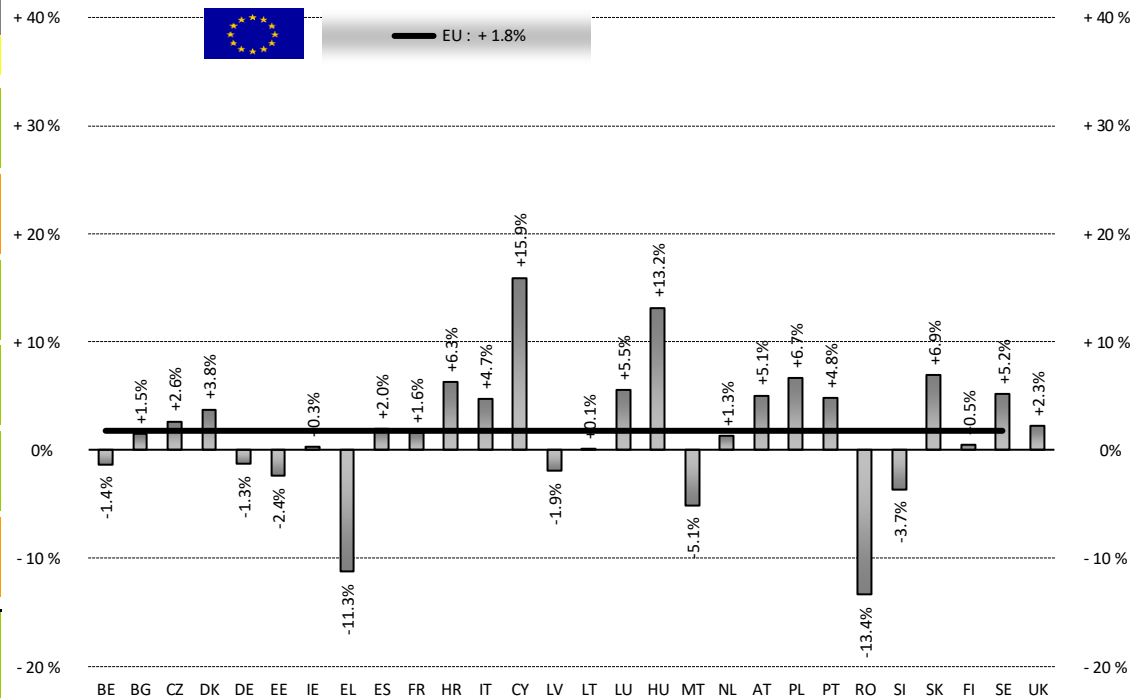
Source : EStat - Newcronos

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PRODUCTION

% EVOLUTION TONNES

TONNES	Jan-Jun 18/17	
	EU15	EU28
Bull	-1.6%	+0.1%
Bullock	-0.9%	-0.9%
Cow	+3.0%	+2.6%
Heifer	+8.1%	+7.7%
Calve	+1.1%	+1.1%
Young cattle	-4.6%	-4.5%
Meat of bovine animals	+1.5%	+1.8%



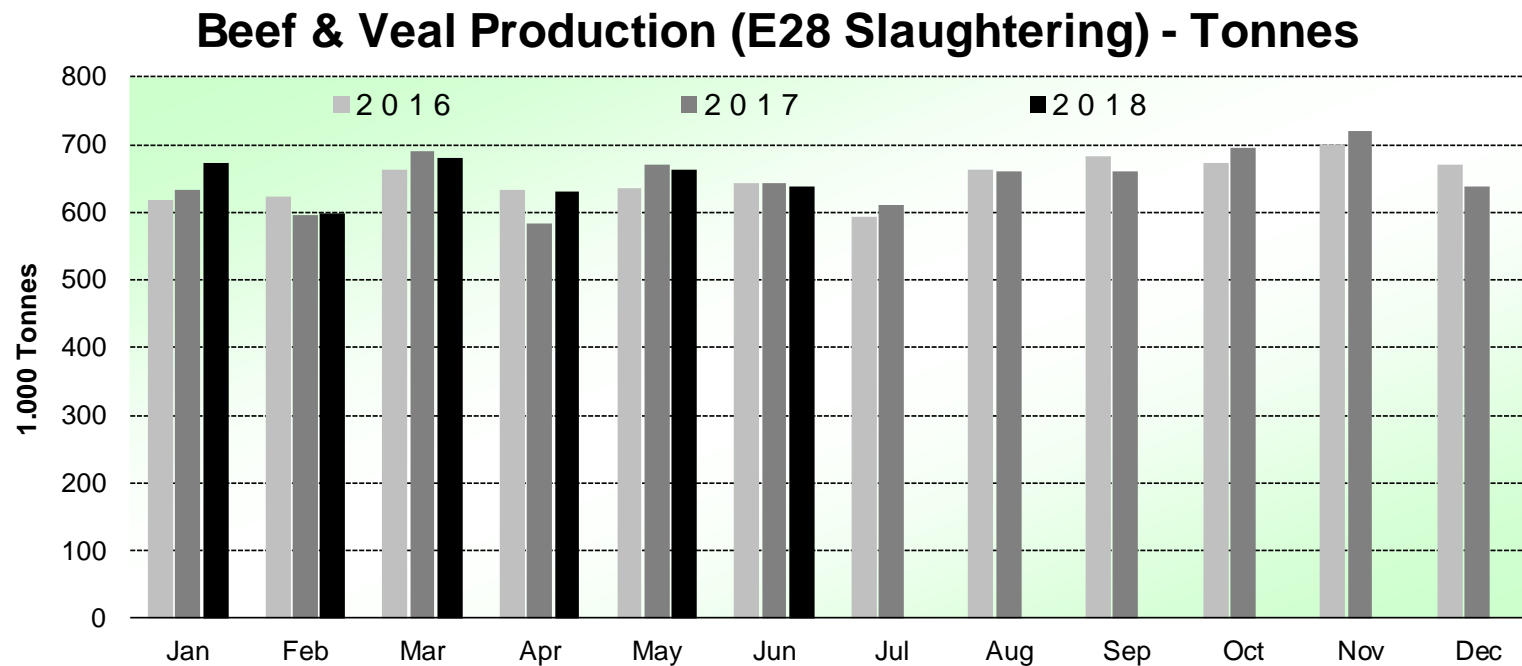
Estimates for last month of period :

Source : EStat - Newcronos

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PRODUCTION

HISTORIC
TONNES



Source : EStat-Newcronos

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PRICES CARCASSES

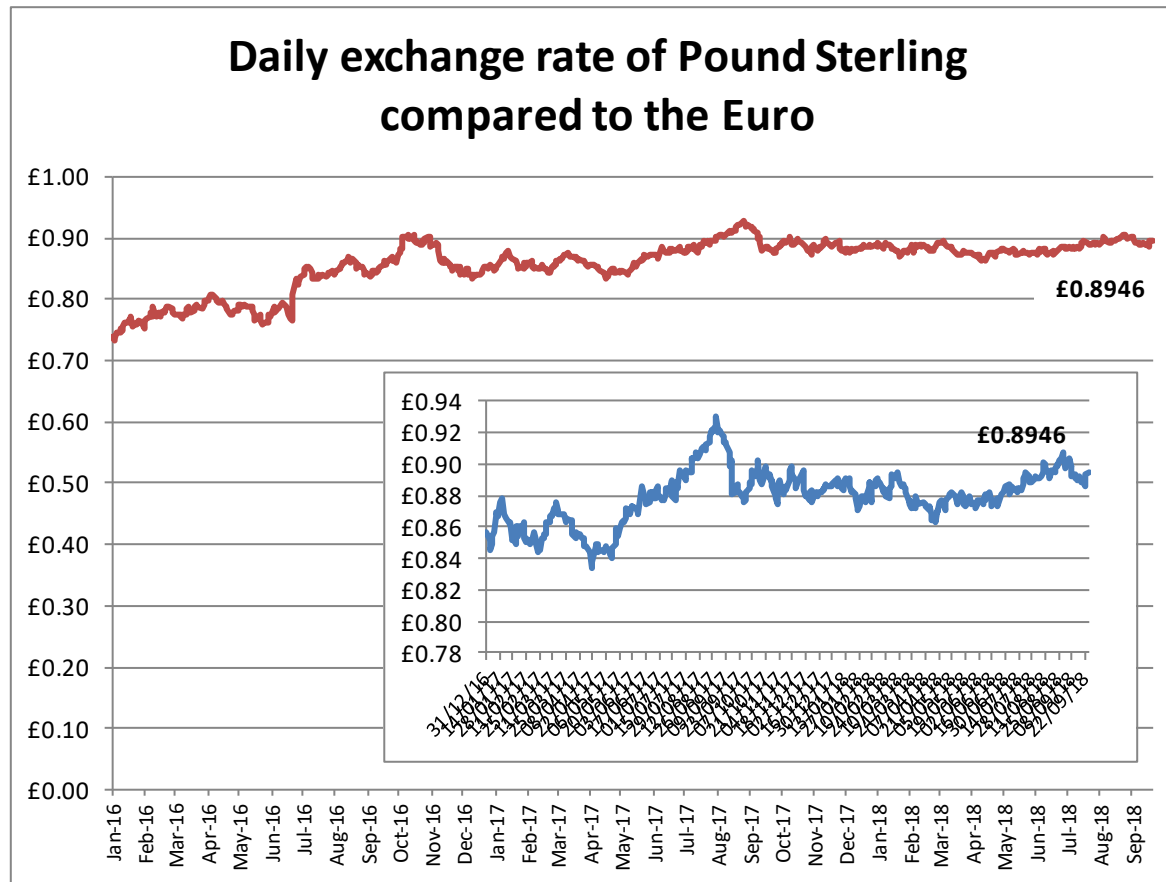
Dashboard

EU Prices week		38	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	374,7	€/100 kg	+ 0,3%	+ 1,1%	- 2,0%
	Young Bovines (Z)	369,8		- 6,4%	- 4,2%	- 6,4%
	Young Bulls (A)	370,5		+ 0,2%	+ 1,0%	- 2,6%
	Steers (C)	400,7		- 0,2%	+ 0,6%	- 1,1%
	Cows (D)	291,2		- 0,1%	+ 0,6%	- 3,1%
	Heifers (E)	382,1		- 0,4%	+ 1,4%	- 1,2%
Live Animals	Male Calves Dairy Type	89,05	€/head	- 0,1%	- 15,0%	- 6,6%
	Male Calves Beef Type	206,1		- 0,6%	- 3,3%	- 0,6%
	Young Store Cattle	2,33	€/kg	- 0,3%	- 1,4%	- 2,6%
	Yearling Male Store Cattle	2,24		- 0,9%	- 2,4%	- 3,4%
	Yearling Female Store Cattle	2,28		- 0,5%	- 1,6%	- 3,0%
	Calves slaughtered <8M	501,4	€/100	+ 1,4%	+ 4,9%	- 1,1%

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

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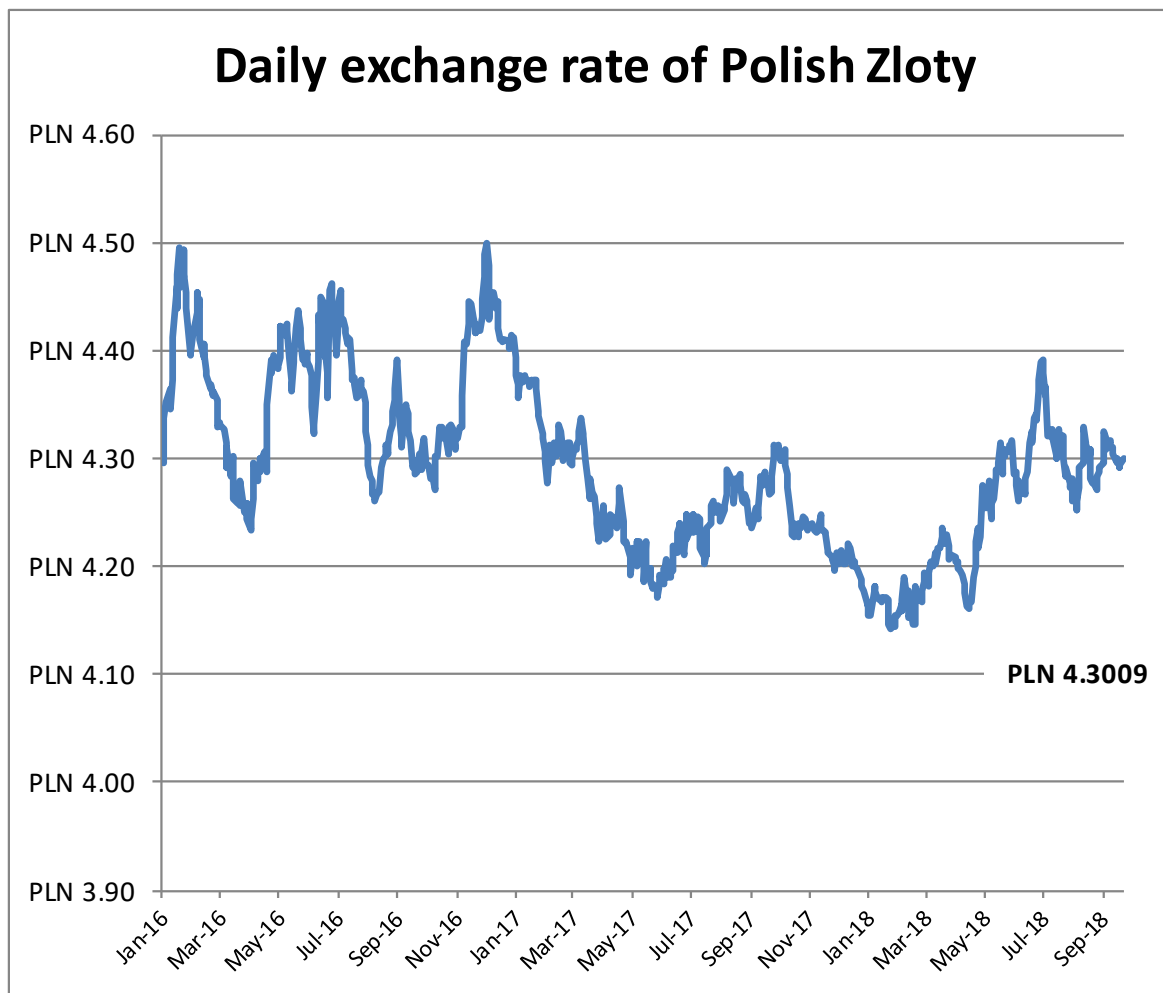
EXCHANGE RATE INDEX / Euro



Source : ECB

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EXCHANGE RATE INDEX / Euro



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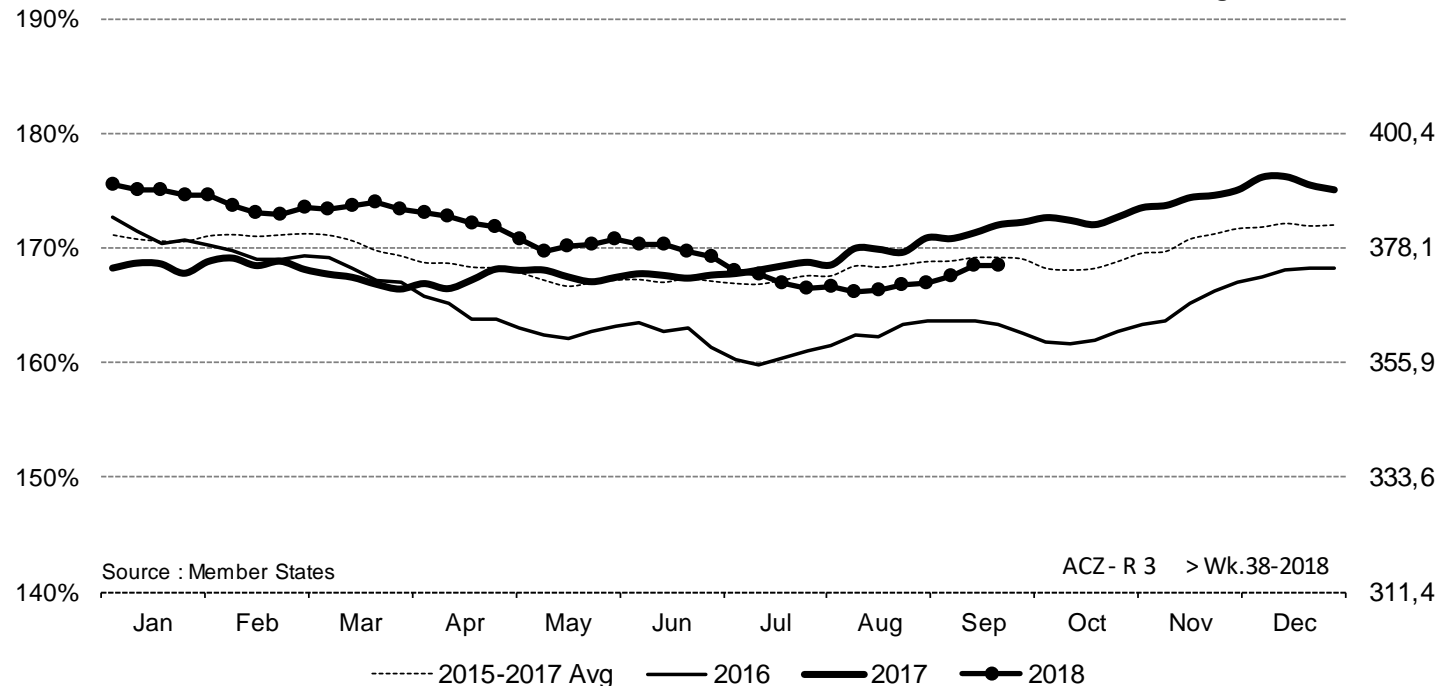
PRICES CARCASSES

EU EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.38-2018

% of Reference Price

€/100 kg cwe



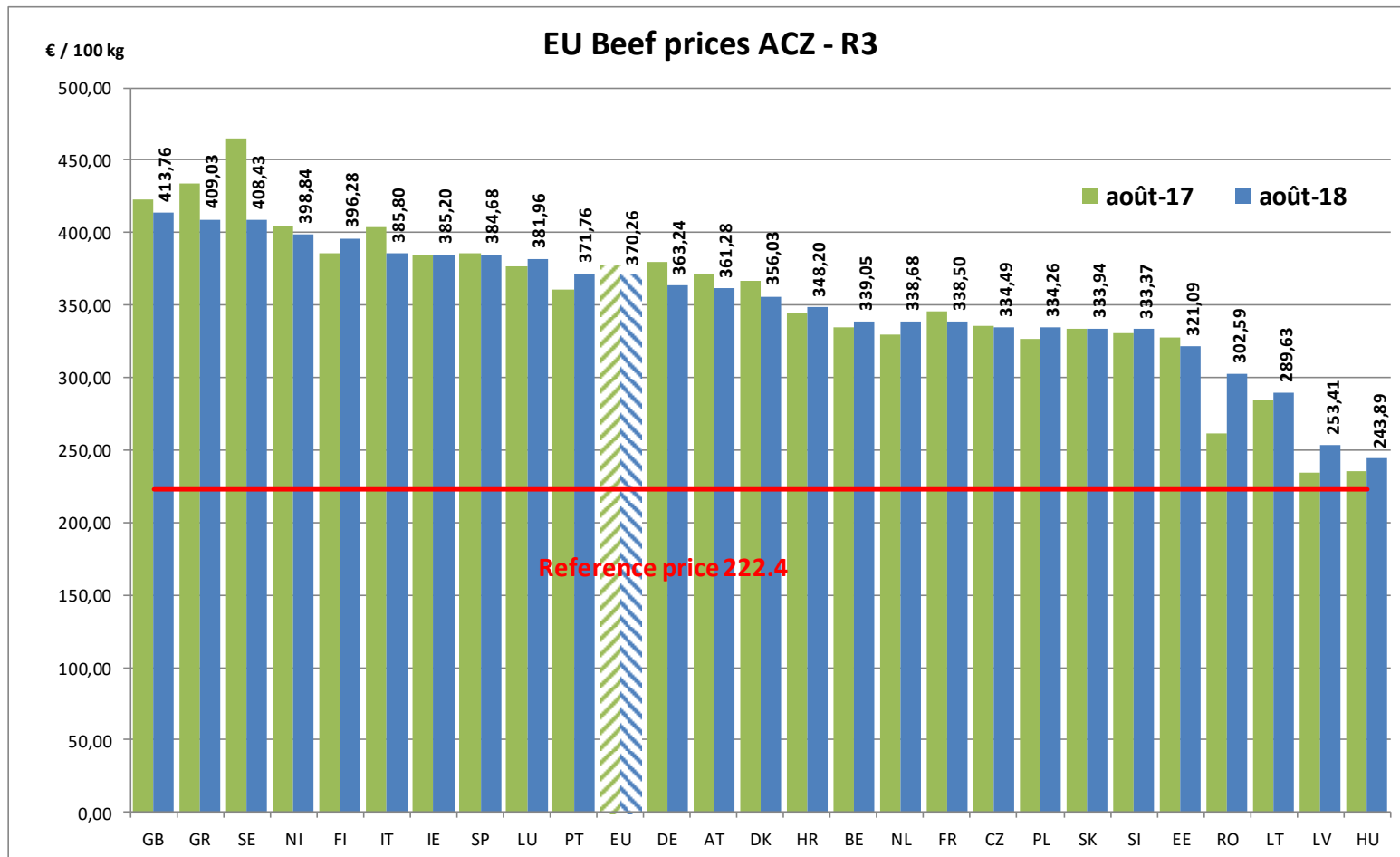
Price in week 38 : **374,72**
 % change y/y : **- 2,0%**
 % Ref. Price in wk 38 : **172,0%**

Average price in août 2018 : **370,26**
 % change y/y : **- 1,9%**

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PRICES CARCASSES

EU EVOLUTION A/C/Z.R3

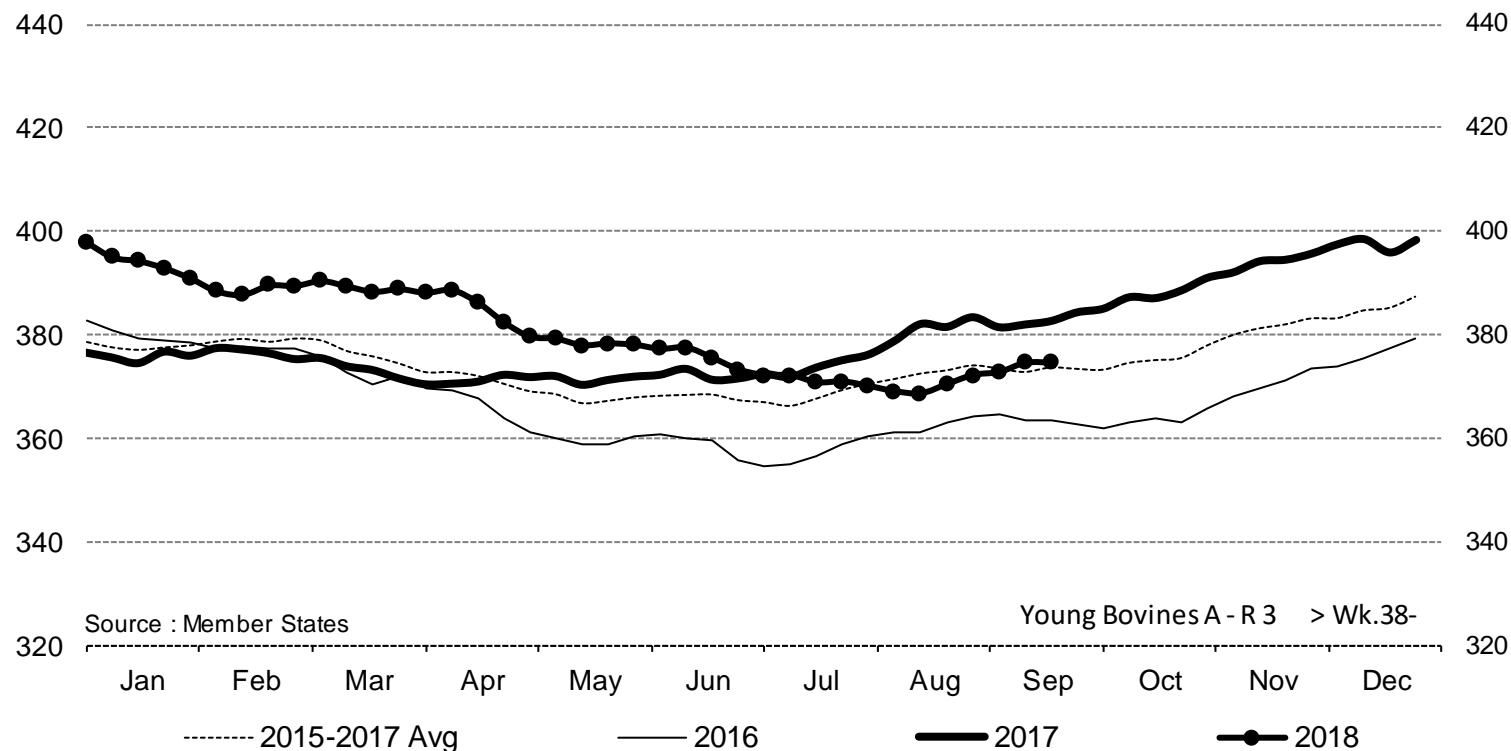


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PRICES CARCASSES

EU EVOLUTION YOUNG BULL - A.R3

Young Bovines A - R 3 > Wk.38-2018



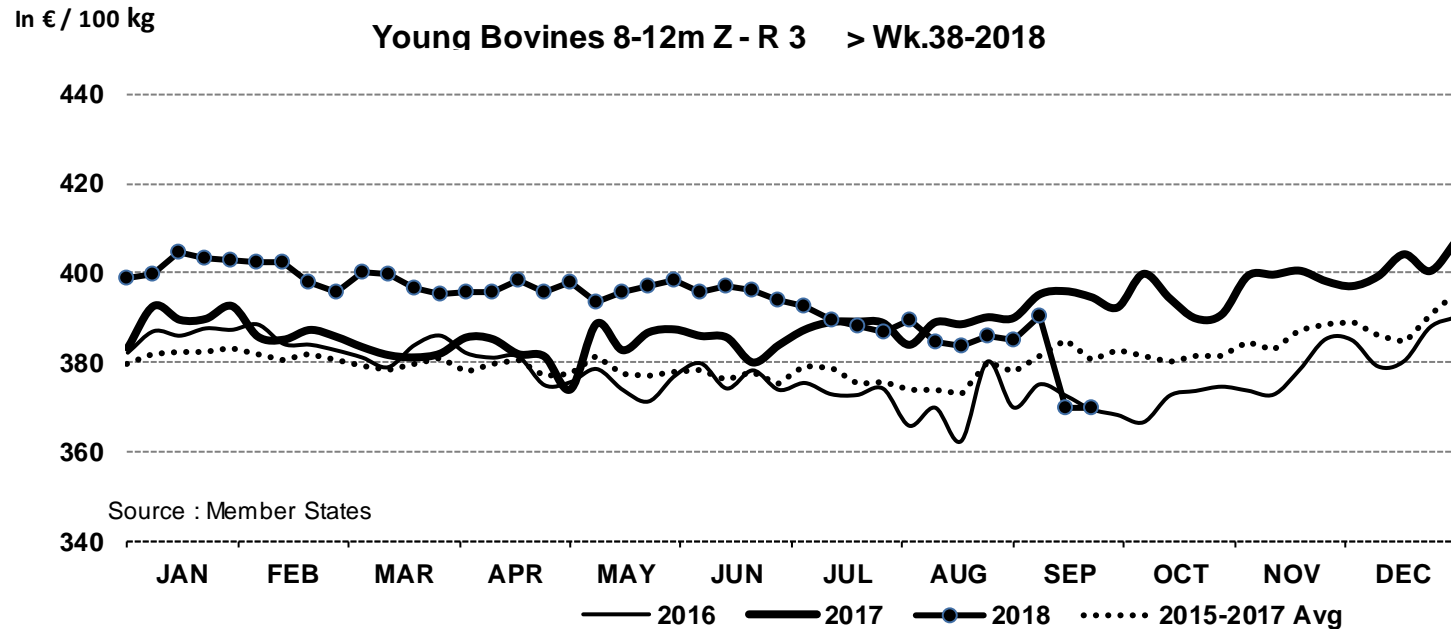
Price in week 38 : **374,45**
% change y/y : **- 2,2%**

Average price in août 2018 : **369,80**
% change y/y : **- 2,8%**

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PRICES CARCASSES

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



Price in week 38 : **369,89**
% change y/y : **- 6,2%**

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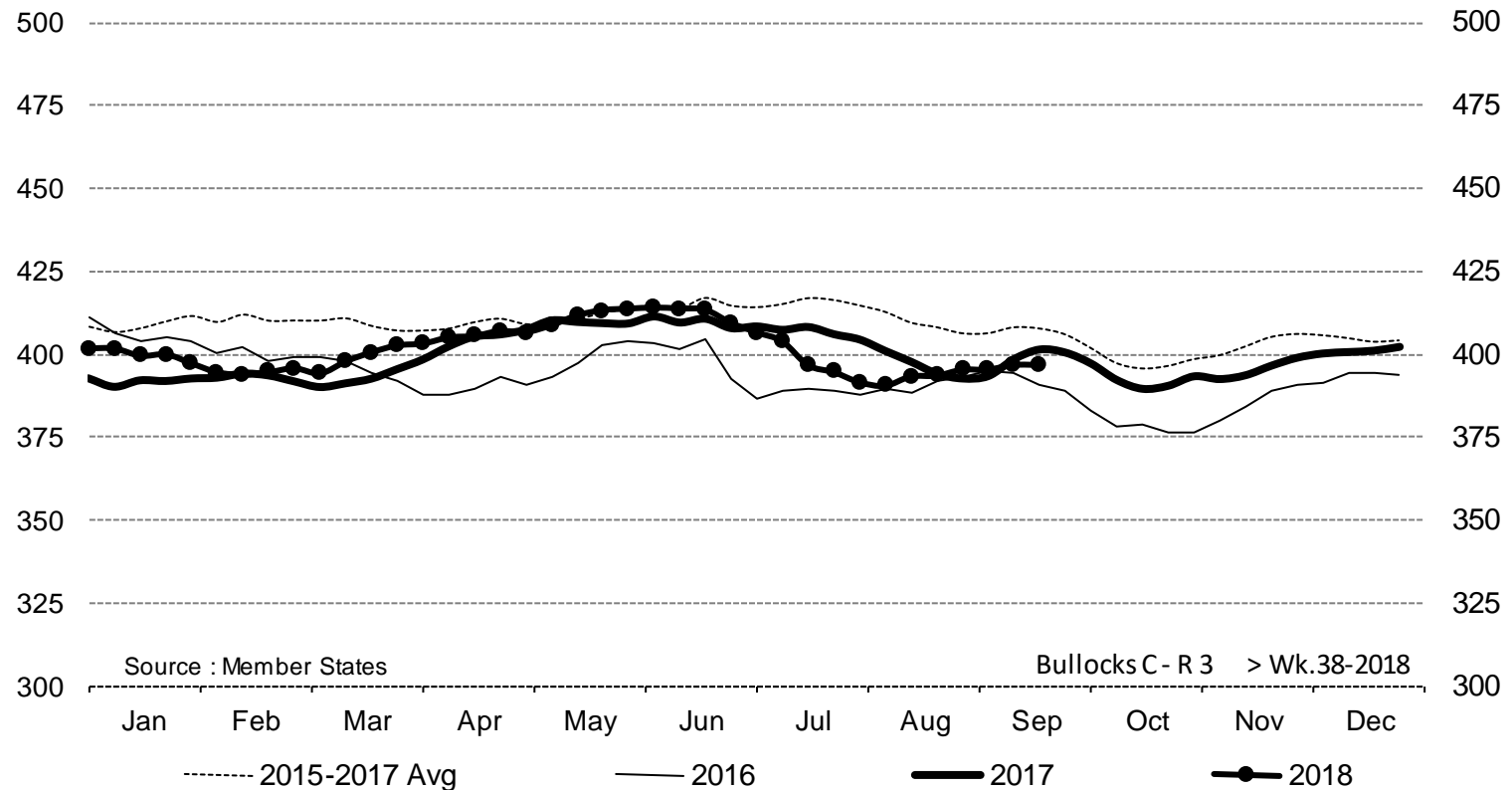
Average price in août 2018 : **385,51**
% change y/y : **- 0,7%**

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PRICES CARCASSES

E.U. EVOLUTION STEER - C.R3

Bullocks C - R 3 > Wk.38-2018



Price in week 38 : **396,76**
% change y/y : **- 1,1%**

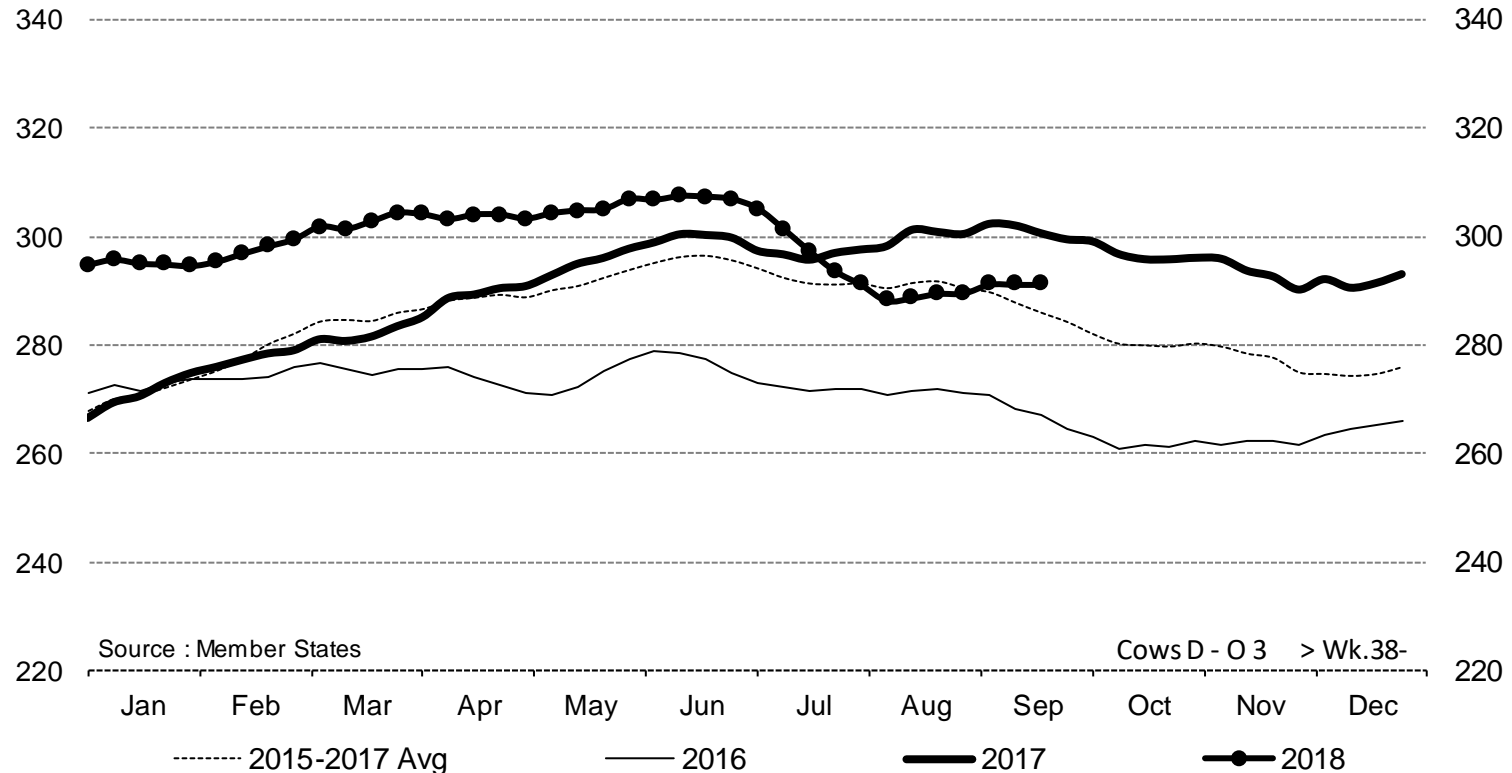
Average price in août 2018 : **392,79**
% change y/y : **- 1,3%**

2 October 2018

PRICES CARCASSES

E.U. EVOLUTION
COW - D.O3

Cows D - O 3 > Wk.38-2018



Price in week 38 : **291,27**
% change y/y : **- 3,1%**

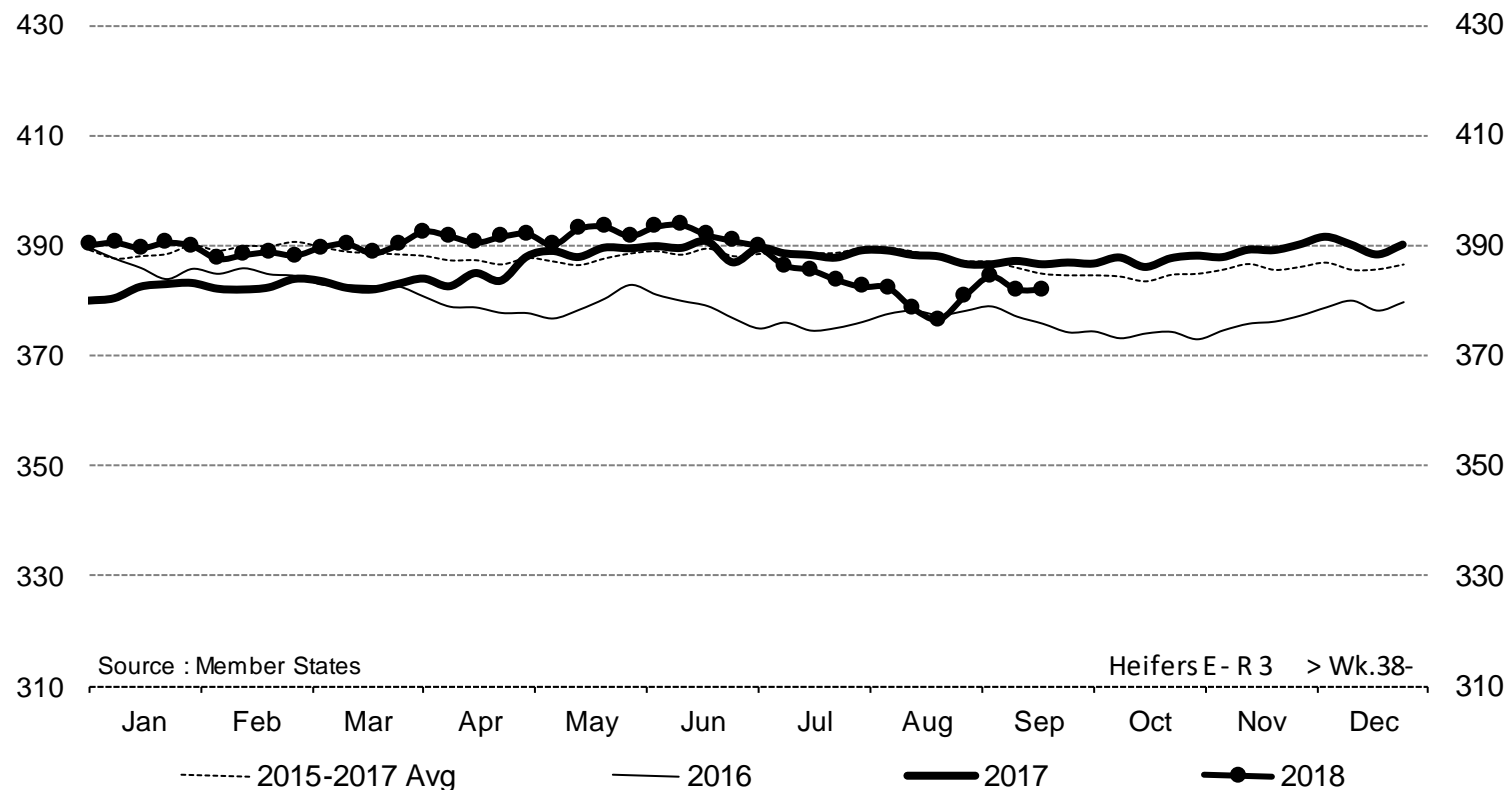
Average price in août 2018 : **289,42**
% change y/y : **- 3,4%**

2 October 2018

PRICES CARCASSES

EU EVOLUTION HEIFER - E.R3

Heifers E - R 3 > Wk.38-2018



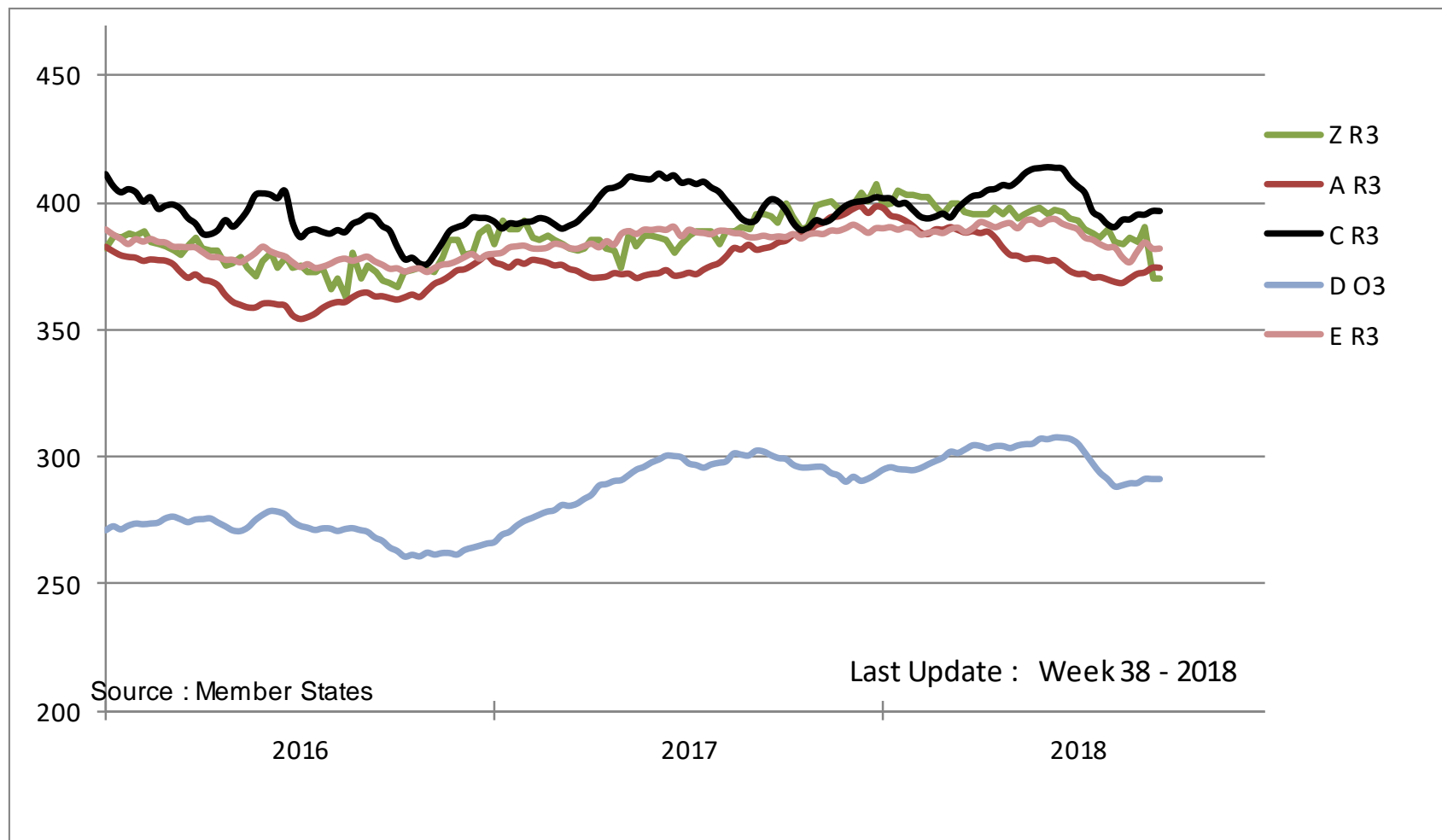
Price in week 38 : **382,11**
% change y/y : **- 1,2%**

Average price in août 2018 : **380,06**
% change y/y : **- 2,1%**

2 October 2018

PRICES CARCASSES

EU EVOLUTION All CAT GLOBAL VIEW

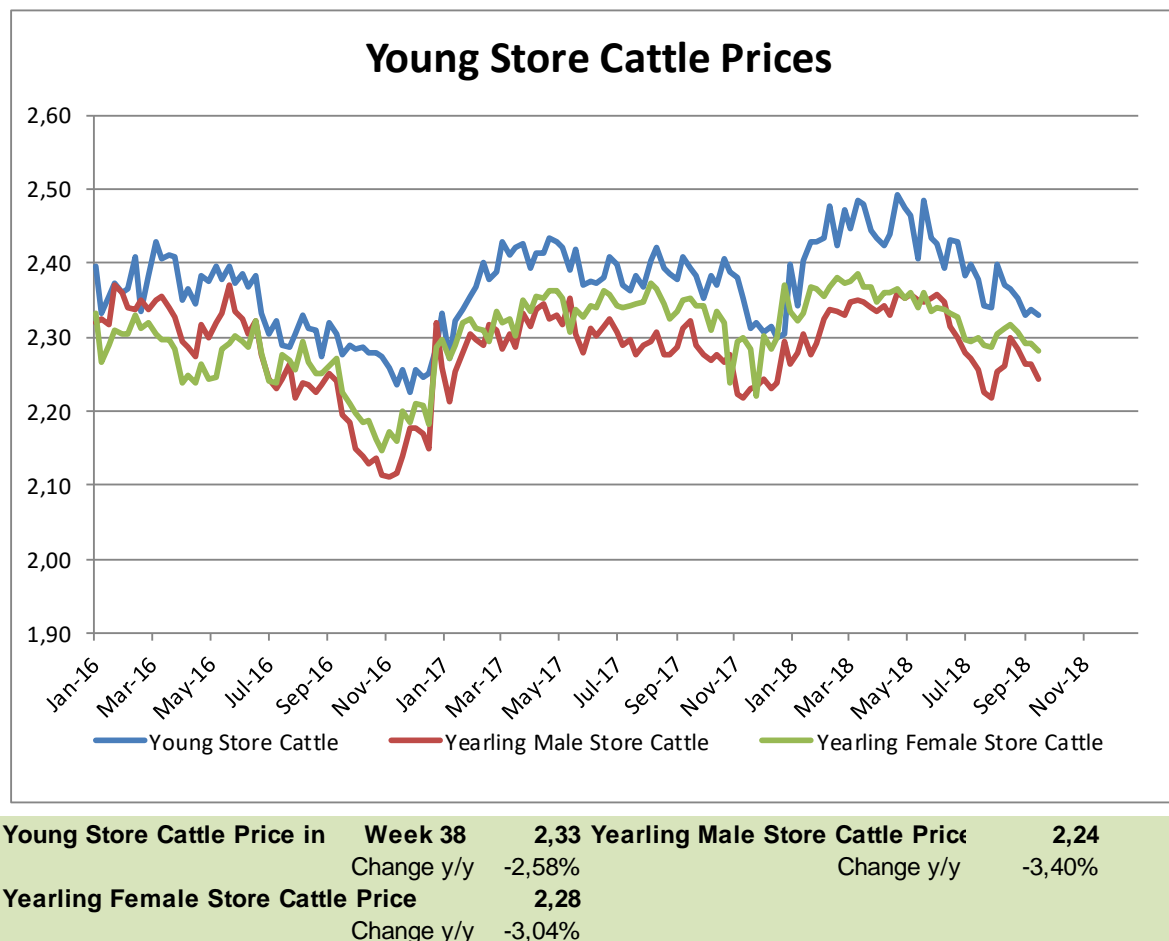


2 October 2018

PRICES LIVE BOVINES

EU EVOLUTION STORE CATTLE

Store cattle (€/100 kg live weight)

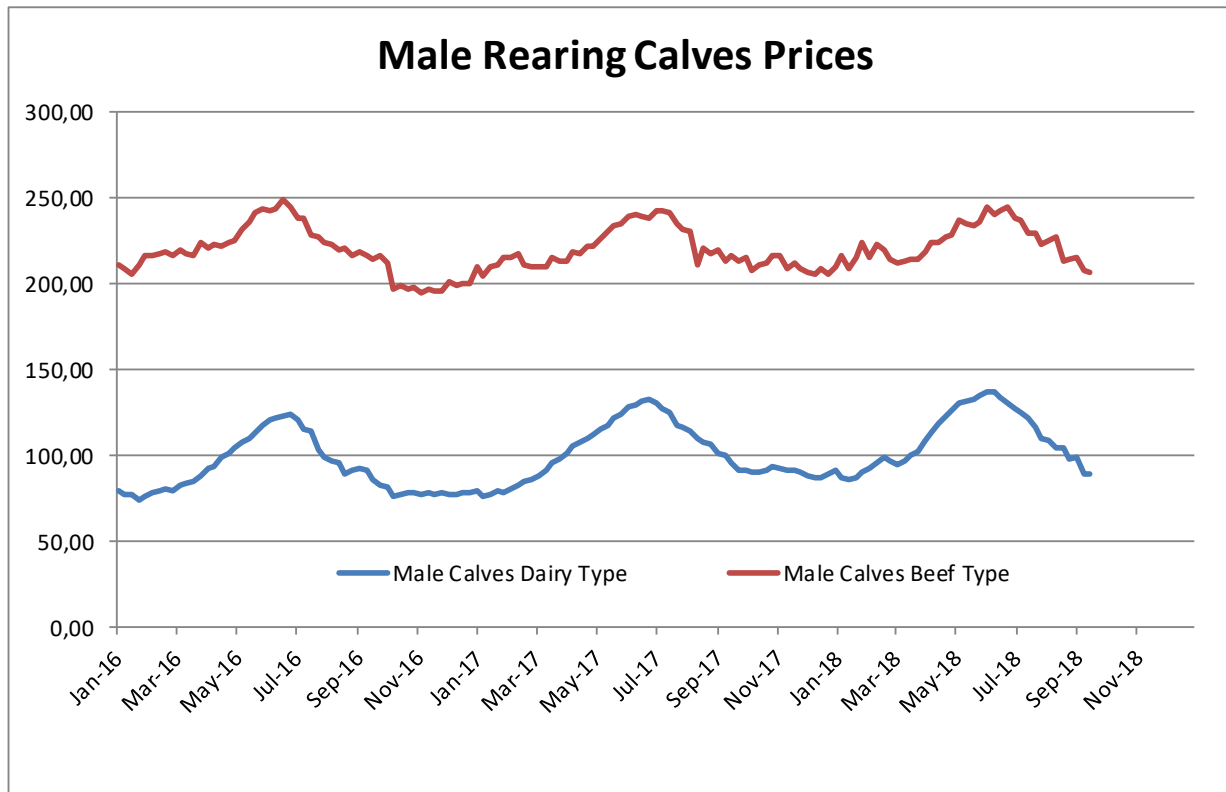


2 October 2018

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 38 206,10
Change y/y -4,83%

Male Rearing Calves Dairy type

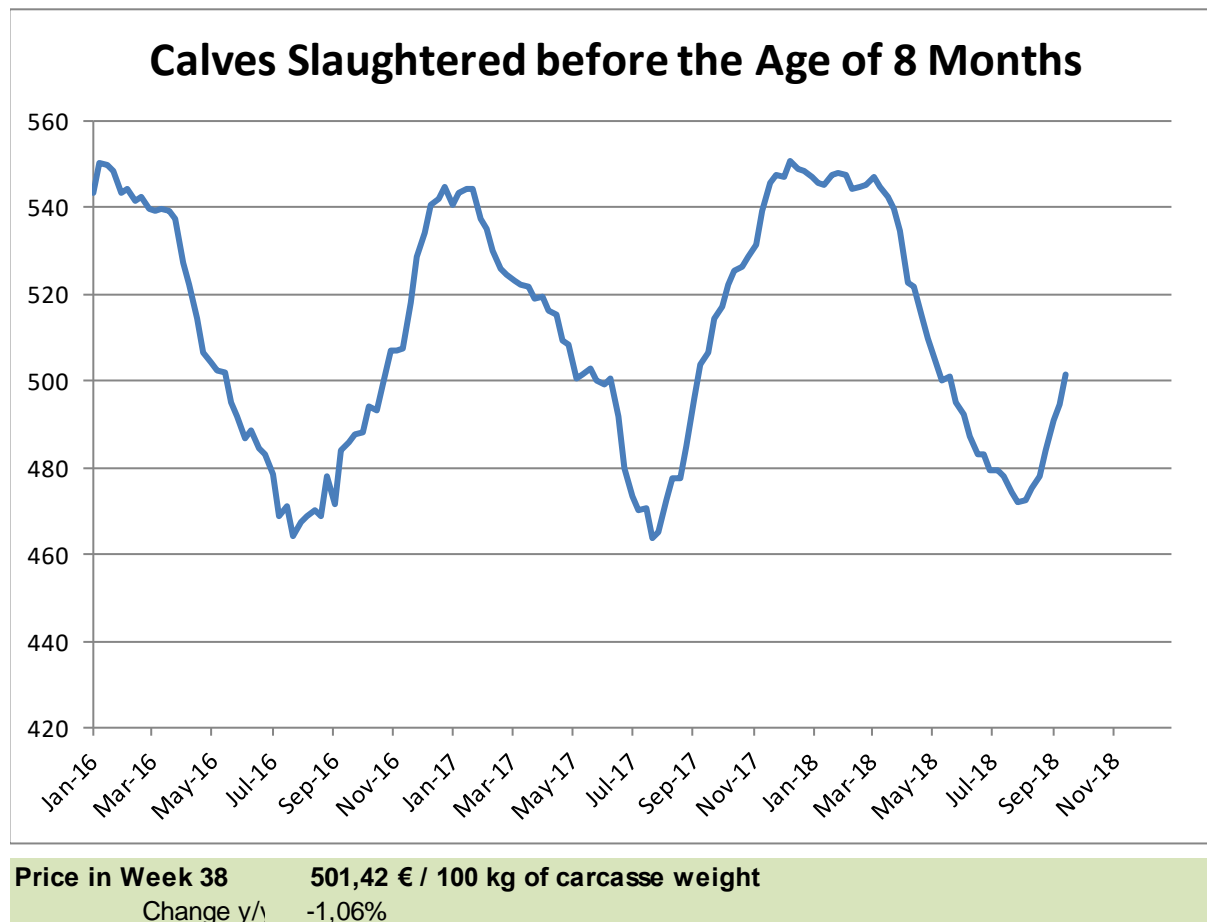
Price in Week 38 89,05
Change y/y -6,62%

2 October 2018

PRICES LIVE BOVINES

EU EVOLUTION Butcher Calves

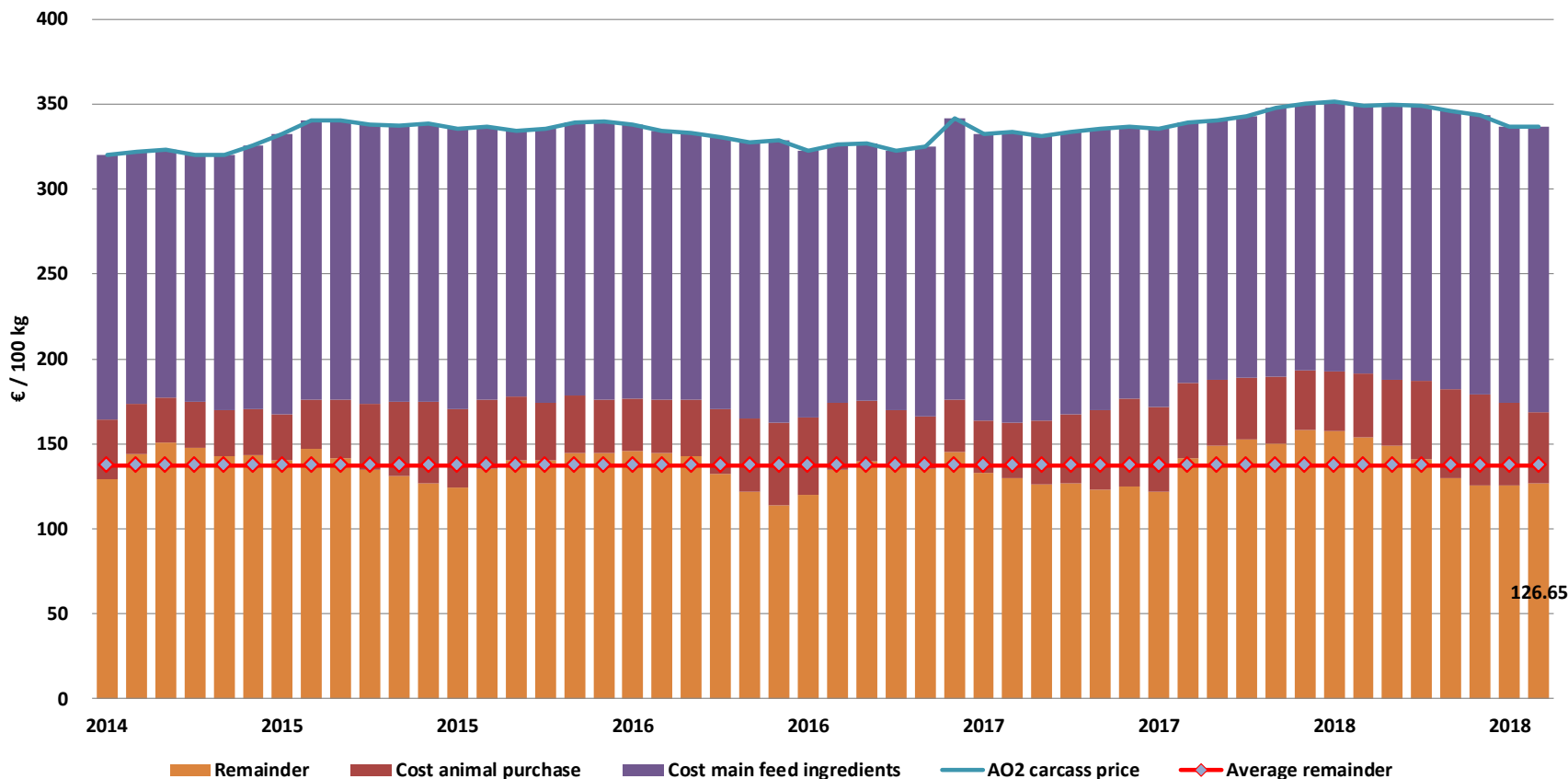
Calves slaughtered before the age of less than 8 months
(€/100 kg cw)



2 October 2018

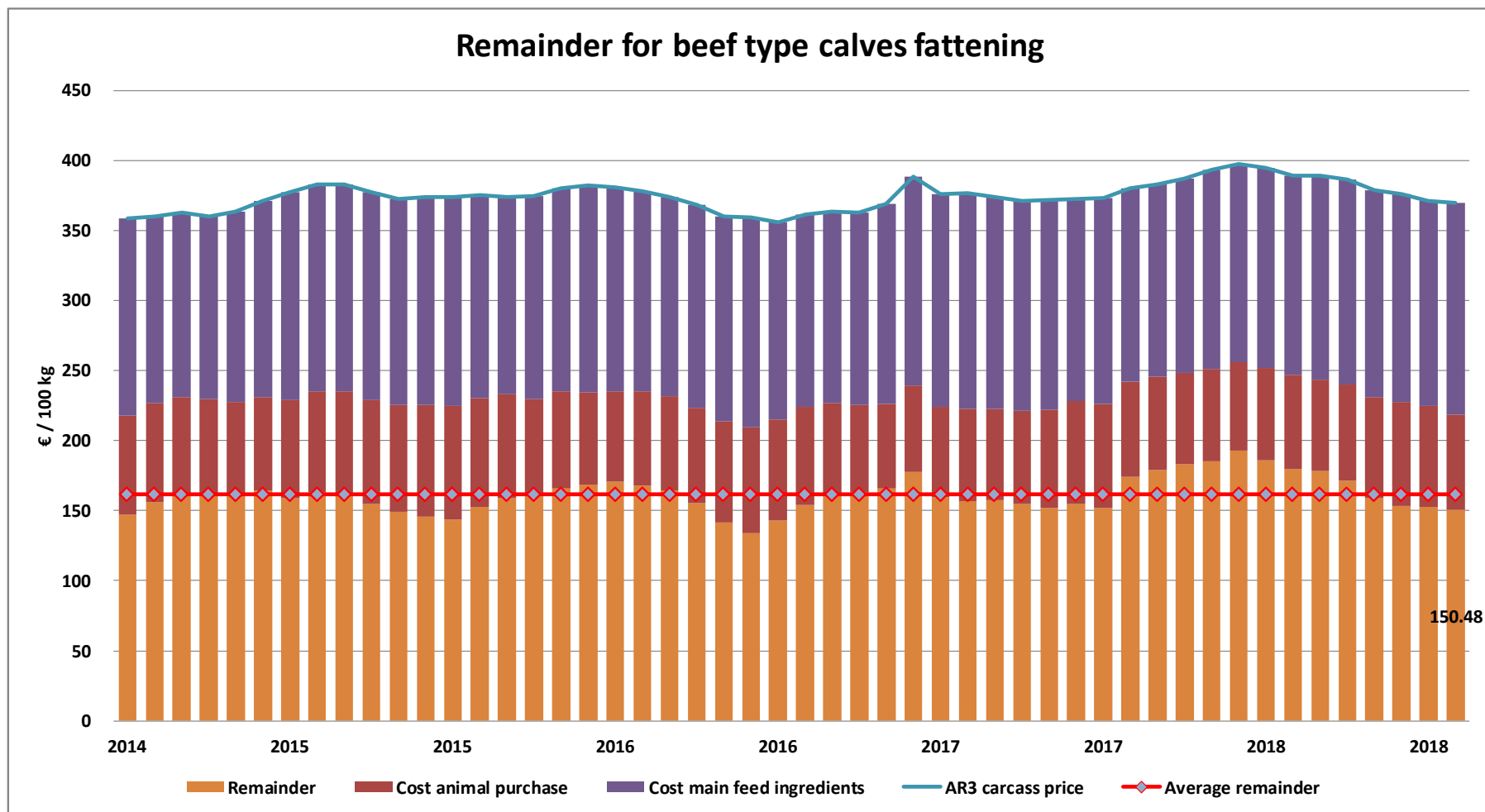
REMAINDERS

Remainder for dairy calves fattening



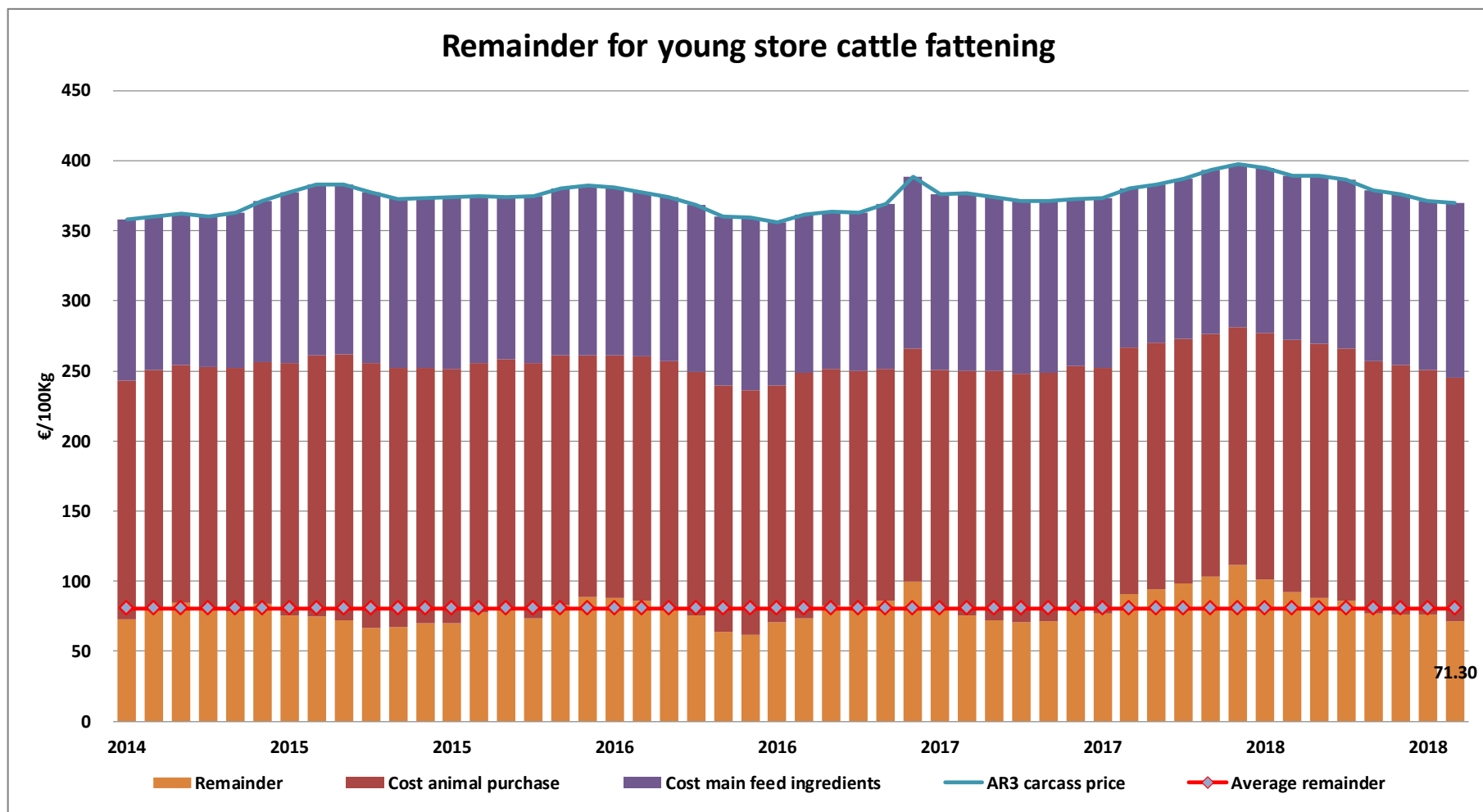
2 October 2018

REMAINDERS



2 October 2018

REMAINDERS



2 October 2018

TRADE

EU EXPORTS

Beef & Live Animals

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

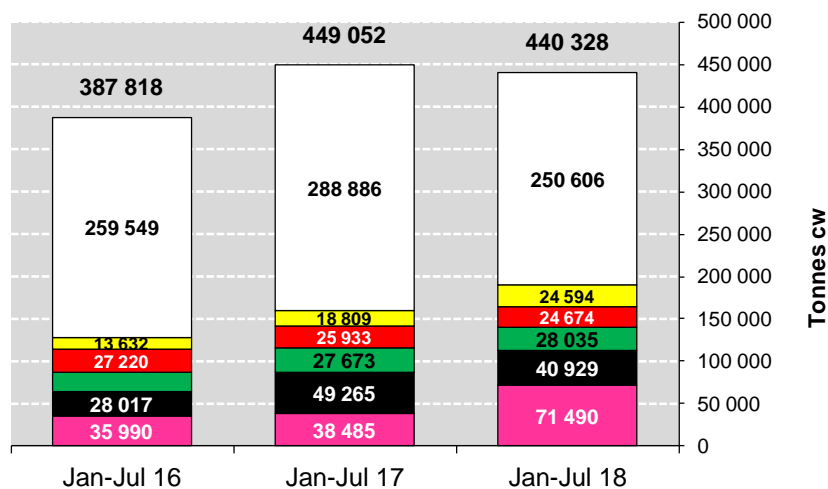
Destinations	2014		2015		2016		2017		Jan-Jul 18		Compared to Jan-Jul 17
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Turkey	8 098	1.4%	57 504	9.6%	71 030	10.0%	96 966	12.6%	71 490	16.2%	+ 85.8%
Hong Kong	65 222	11.6%	45 198	7.5%	58 499	8.3%	90 921	11.9%	40 929	9.3%	- 16.9%
Israel	8 353	1.5%	18 851	3.1%	41 535	5.9%	44 204	5.8%	28 035	6.4%	+ 1.3%
Lebanon	37 994	6.8%	50 263	8.4%	47 033	6.7%	40 256	5.2%	24 674	5.6%	- 4.9%
Algeria	18 499	3.3%	16 085	2.7%	25 004	3.5%	26 479	3.5%	24 594	5.6%	+ 30.8%
Ghana	33 311	5.9%	39 225	6.6%	39 680	5.6%	41 308	5.4%	22 950	5.2%	- 2.1%
Ivory Coast	29 013	5.2%	36 018	6.0%	37 210	5.3%	38 890	5.1%	21 709	4.9%	- 11.2%
Bosnia-Herz.	34 104	6.1%	39 896	6.7%	38 935	5.5%	34 737	4.5%	20 196	4.6%	+ 0.5%
Libya	14 280	2.5%	19 691	3.3%	29 723	4.2%	26 489	3.5%	19 573	4.4%	+ 7.0%
Philippines	11 839	2.1%	13 052	2.2%	24 454	3.5%	38 679	5.0%	15 912	3.6%	- 31.4%
Switzerland	26 633	4.8%	26 019	4.3%	25 599	3.6%	27 375	3.6%	15 481	3.5%	- 4.9%
Russia	96 928	17.3%	13 546	2.3%	16 433	2.3%	23 136	3.0%	8 910	2.0%	- 28.2%
Angola	14 587	2.6%	9 670	1.6%	13 550	1.9%	11 184	1.5%	8 636	2.0%	+ 5.2%
South Africa	1 325	0.2%	7 508	1.3%	7 361	1.0%	7 569	1.0%	8 064	1.8%	+ 53.7%
Chile	27	0.0%	50	0.0%	2 228	0.3%	8 961	1.2%	7 750	1.8%	+ 87.0%
Morocco	7 652	1.4%	4 703	0.8%	7 517	1.1%	10 015	1.3%	6 755	1.5%	+ 22.5%
Norway	7 879	1.4%	19 123	3.2%	18 320	2.6%	12 920	1.7%	6 509	1.5%	- 42.4%
Other Destinations	144 271	25.8%	182 317	30.5%	202 870	28.7%	187 012	24.4%	88 163	20.0%	
Extra-EU	560 014		598 718		706 980		767 102		440 328		
% change			+ 7%		+ 18%		+ 9%		- 1.9%		

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

Destinations	2014		2015		2016		2017		Jan-Jul 18		Compared to Jan-Jul 17
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	28 573	8.2%	65 112	14.6%	45 198	10.8%	58 416	12.1%	40 929	14.0%	- 16.9%
Turkey	559	0.2%	1 280	0.3%	9 482	2.3%	10 751	2.2%	27 171	9.3%	+++
Ghana	40 878	11.8%	33 255	7.5%	37 364	8.9%	35 340	7.3%	22 950	7.9%	- 2.1%
Ivory Coast	21 619	6.2%	28 839	6.5%	35 740	8.5%	36 713	7.6%	21 709	7.4%	- 11.2%
Bosnia-Herz.	21 870	6.3%	31 821	7.1%	36 593	8.7%	36 850	7.6%	18 961	6.5%	+ 0.7%
Philippines	2 534	0.7%	11 630	2.6%	13 053	3.1%	24 247	5.0%	15 912	5.5%	- 31.4%
Switzerland	25 817	7.4%	25 730	5.8%	25 009	6.0%	24 435	5.1%	14 773	5.1%	- 4.9%
Israel	4 224	1.2%	3 855	0.9%	6 087	1.5%	15 137	3.1%	13 039	4.5%	+ 15.6%
Angola	10 589	3.0%	14 587	3.3%	9 643	2.3%	13 549	2.8%	8 636	3.0%	+ 5.2%
South Africa	3 339	1.0%	1 325	0.3%	7 481	1.8%	7 361	1.5%	8 064	2.8%	+ 53.7%
Algeria	3 135	0.9%	4 227	0.9%	6 662	1.6%	10 726	2.2%	7 973	2.7%	- 30.3%
Chile	1	0.0%	27	0.0%	50	0.0%	2 228	0.5%	7 750	2.7%	+ 87.0%
Norway	10 217	2.9%	7 872	1.8%	19 122	4.6%	18 315	3.8%	6 506	2.2%	- 42.4%
For.JRep.Mac	10 315	3.0%	10 994	2.5%	12 375	3.0%	11 451	2.4%	5 750	2.0%	- 12.6%
Ukraine	2 870	0.8%	2 498	0.6%	2 747	0.7%	7 094	1.5%	5 009	1.7%	+ 26.8%
Vietnam	3 175	0.9%	6 410	1.4%	11 627	2.8%	22 252	4.6%	4 121	1.4%	- 61.4%
China	7 228	2.1%	8 242	1.9%	6 027	1.4%	10 804	2.2%	3 774	1.3%	- 11.7%
Other Destinations	150 312	43.3%	187 568	42.1%	134 124	32.1%	136 176	28.3%	58 532	20.1%	
Extra-EU	347 252		445 272		418 383		481 846		291 558		
% change			+ 28%		- 6%		+ 15%		- 7.8%		

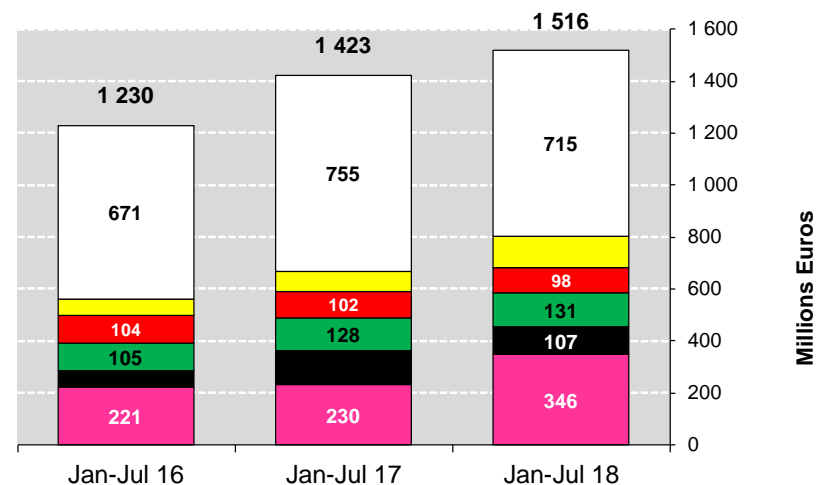
EU exports of beef and live animals: Trade figures (COMEXT)

EU EXPORTS of Beef & Veal (Tonnes cwe)



■ Turkey ■ Hong Kong ■ Israel ■ Lebanon ■ Algeria □ Other destinations Series12

EU EXPORTS of Beef & Veal (Millions EUR)

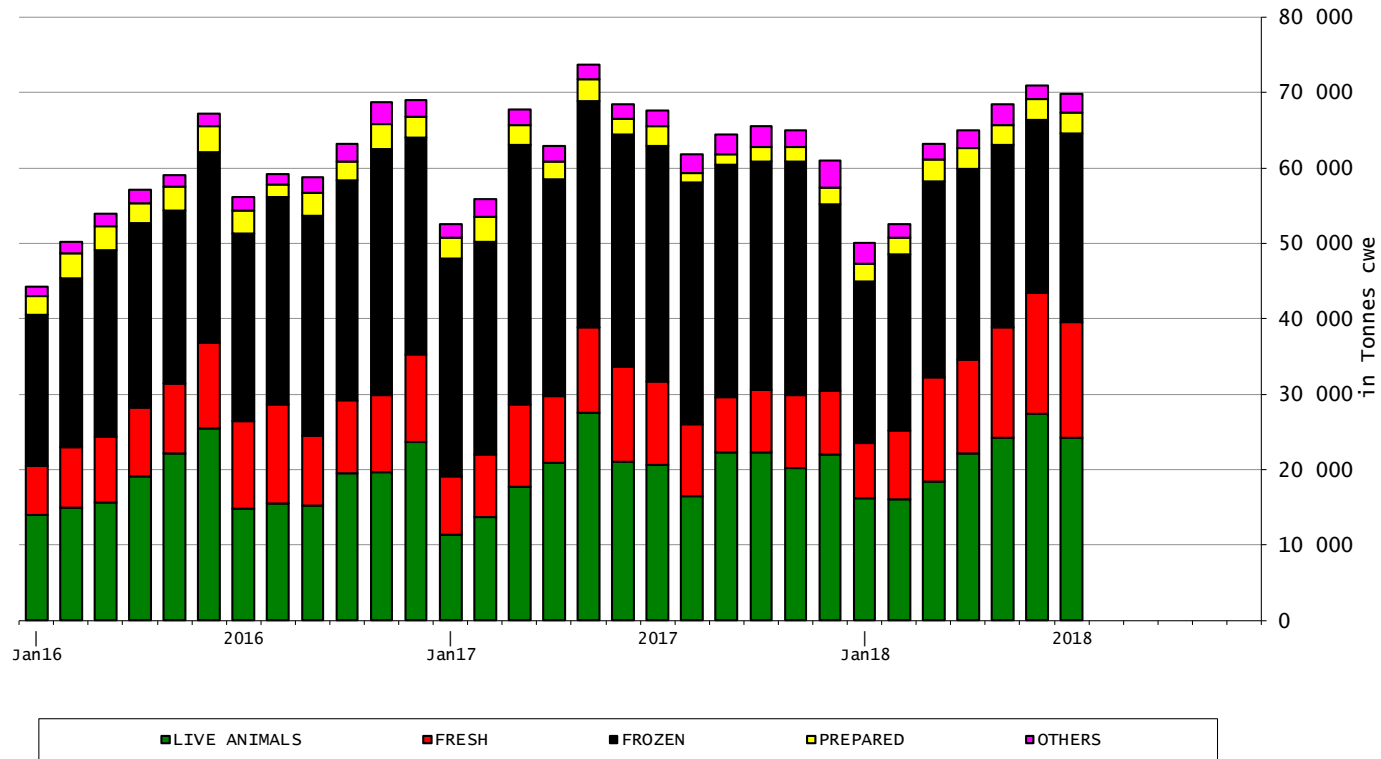


■ Turkey ■ Hong Kong ■ Israel ■ Lebanon ■ Algeria □ Other destinations Series12

TRADE

EU EXPORTS Beef Products

EU-28 Exports of BEEF products

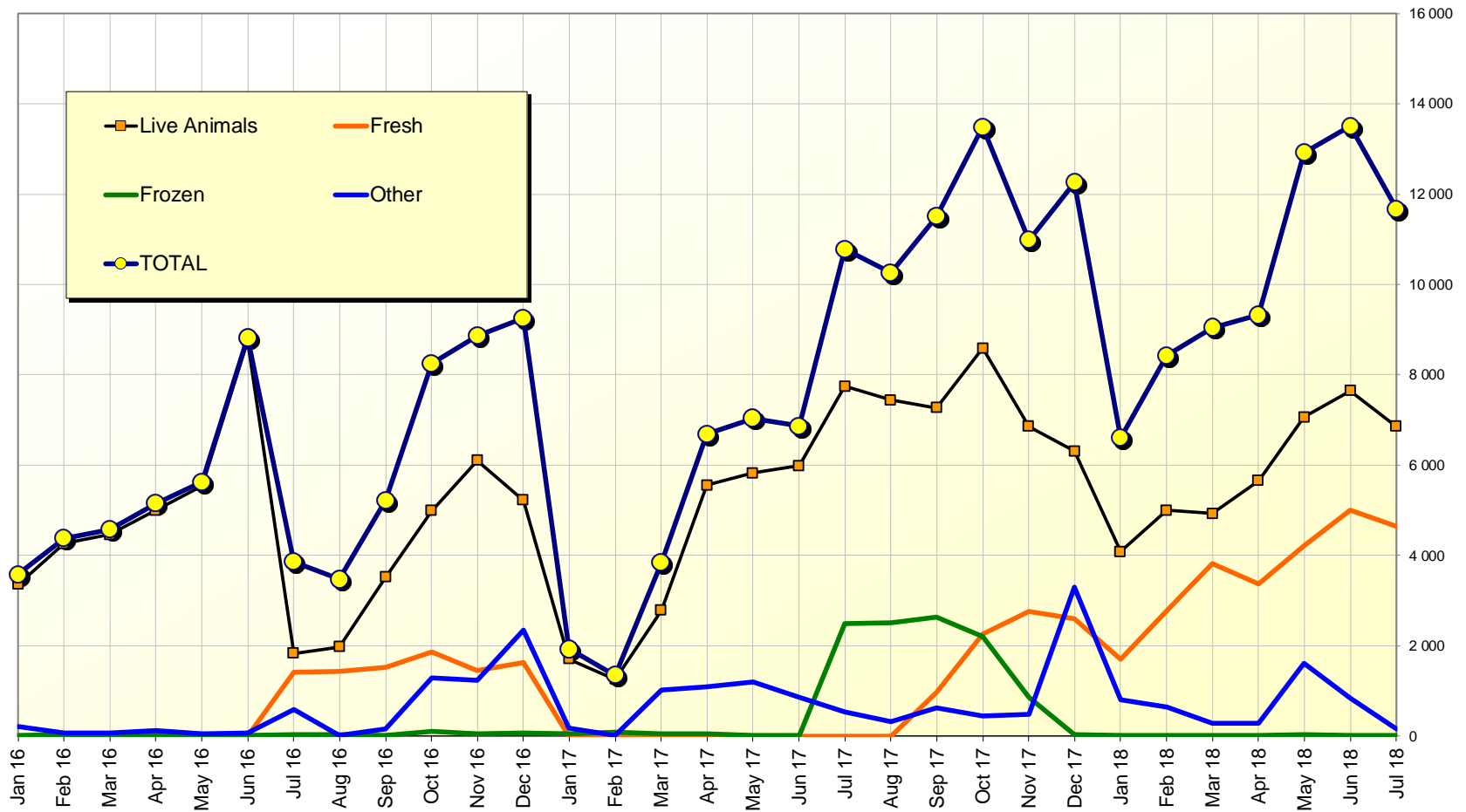


TRADE

EU EXPORTS

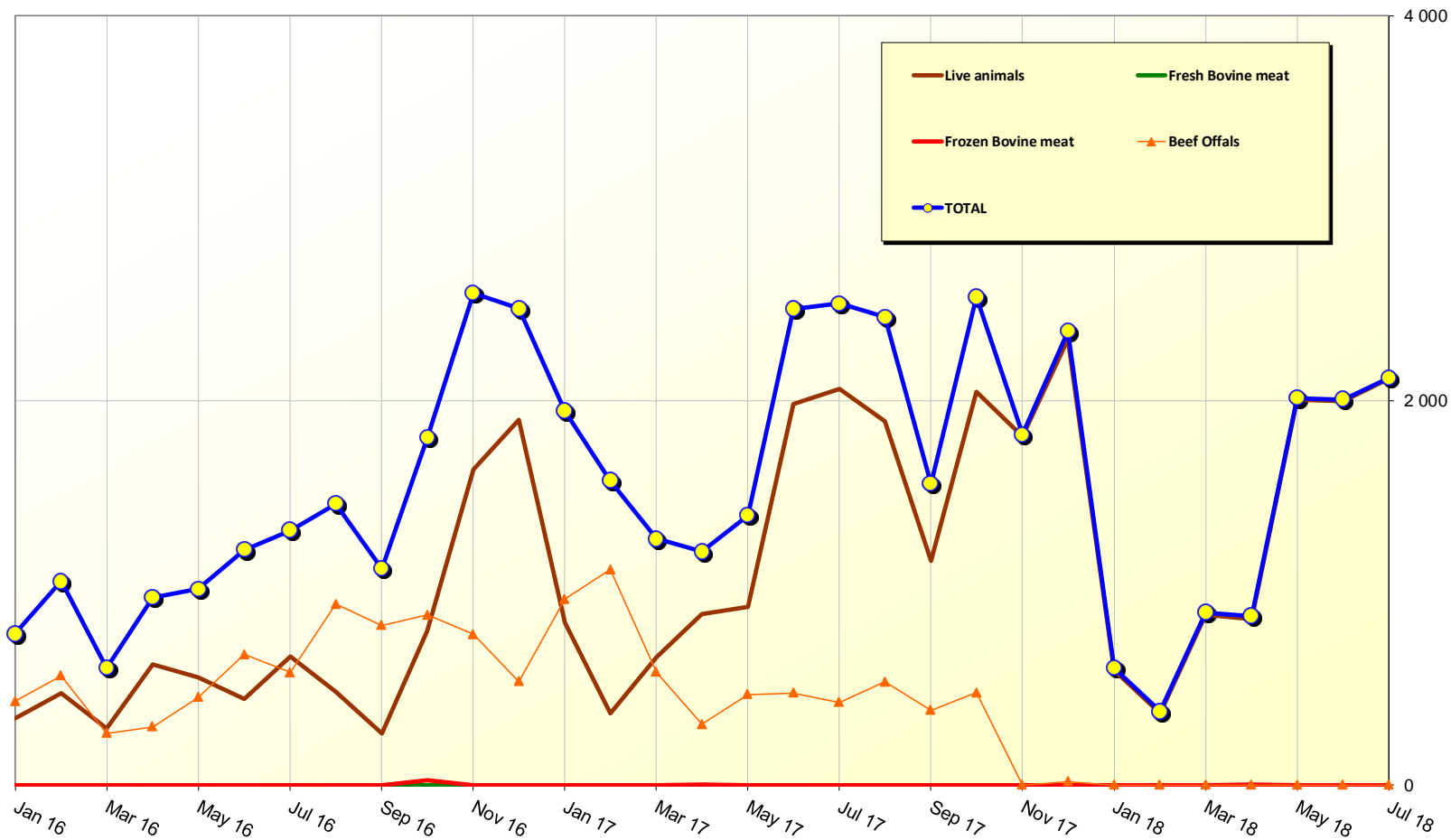
Beef to TURKEY

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



2 October 2018

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

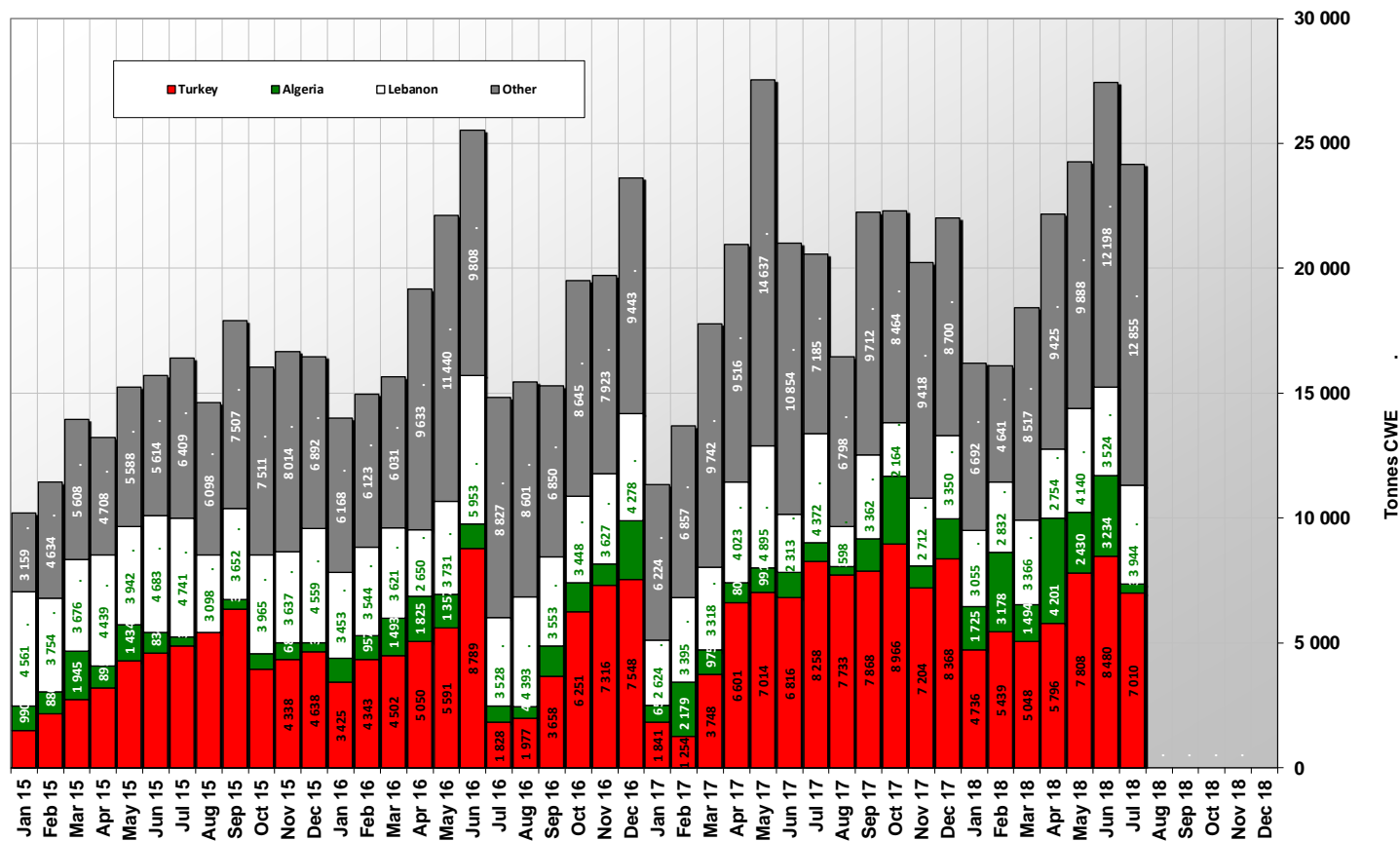


2 October 2018

TRADE

EU EXPORTS Live Animals

EU-28 Exports of LIVE Bovine Animals
(Source COMEXT - Tonnes cwe)

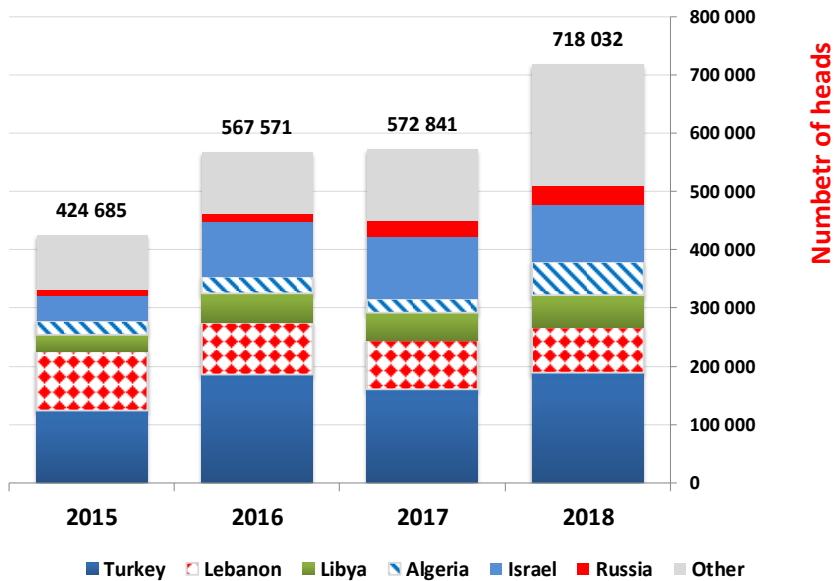


2 October 2018

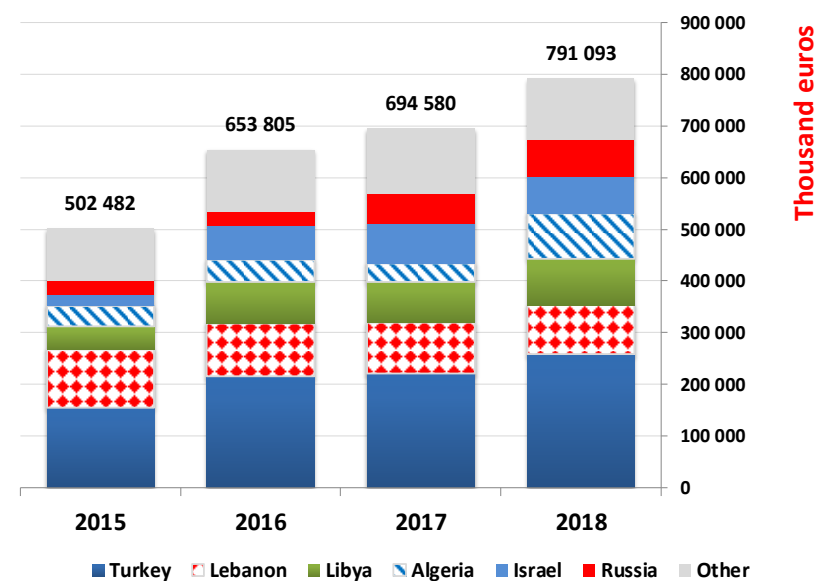
TRADE

EU EXPORTS Live Animals

EU Exports of BEEF live animals by partner for the period Jan-Jul 2018



EU Exports of BEEF live animals by partner for the period Jan-Jul 2018



2 October 2018

TRADE

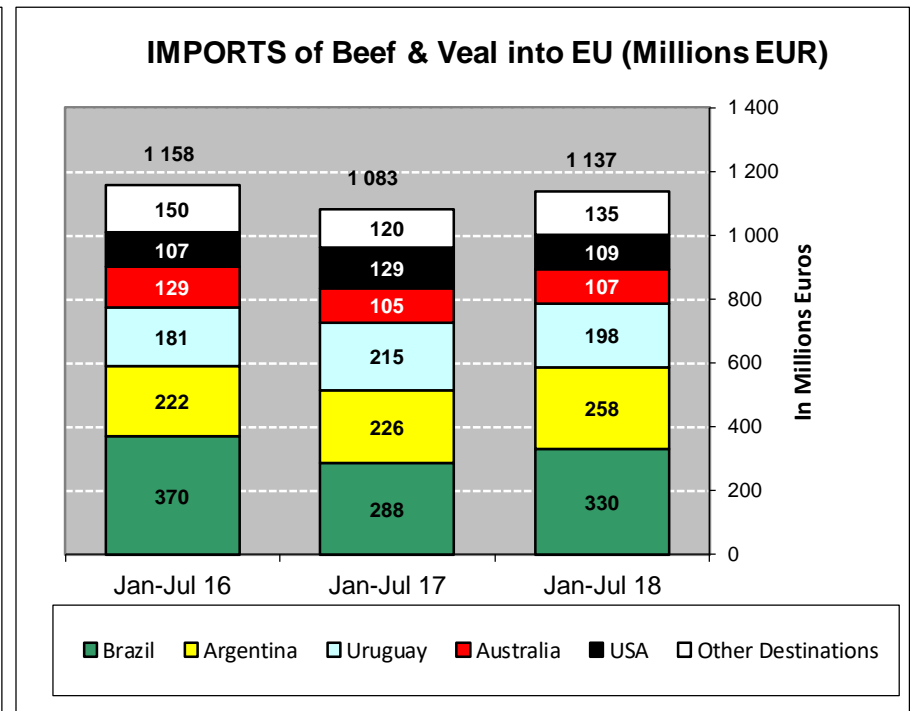
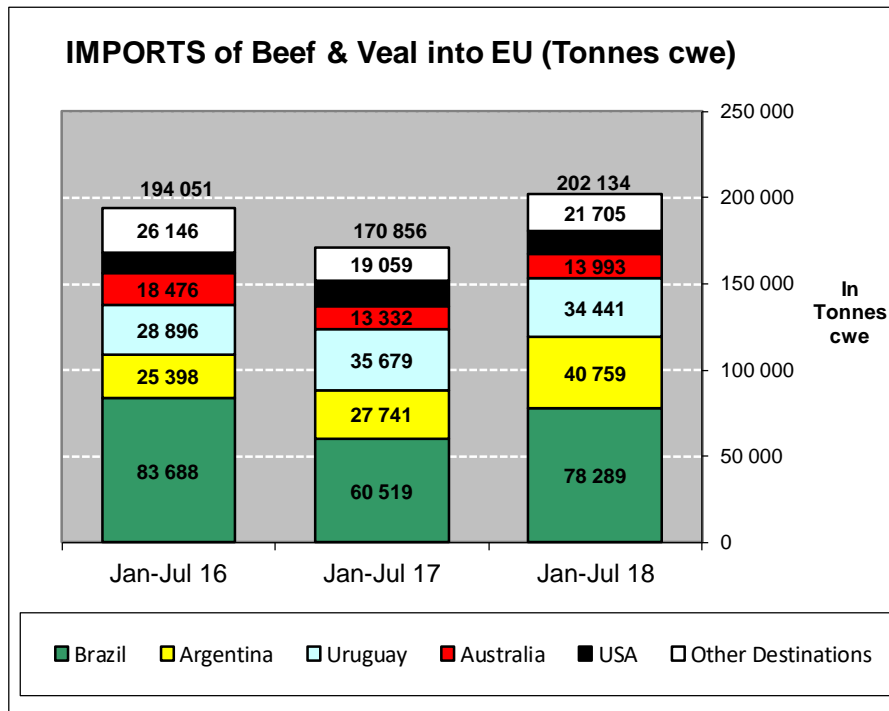
EU IMPORTS

Beef & Live Animals

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

Origins	2014		2015		2016		2017		Jan-Jul 18		Compared to Jan-Jul 17
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	144 259	43.4%	136 858	42.4%	140 306	42.0%	115 450	37.7%	78 289	38.7%	+ 29.4%
Argentina	42 074	12.7%	42 149	13.0%	43 558	13.0%	49 916	16.3%	40 759	20.2%	+ 46.9%
Uruguay	49 043	14.8%	46 287	14.3%	56 703	17.0%	58 111	19.0%	34 441	17.0%	- 3.5%
Australia	32 653	9.8%	30 884	9.6%	27 794	8.3%	21 989	7.2%	13 993	6.9%	+ 5.0%
USA	23 234	7.0%	24 132	7.5%	20 482	6.1%	21 591	7.0%	12 947	6.4%	- 10.9%
New Zealand	14 432	4.3%	11 380	3.5%	9 906	3.0%	8 099	2.6%	5 260	2.6%	+ 6.7%
Paraguay	0	0.0%	1 915	0.6%	5 947	1.8%	6 914	2.3%	3 945	2.0%	+ 14.7%
Namibia	9 994	3.0%	12 112	3.7%	10 685	3.2%	7 705	2.5%	3 672	1.8%	+ 4.0%
Botswana	6 424	1.9%	9 258	2.9%	9 382	2.8%	7 718	2.5%	3 349	1.7%	+ 40.6%
Switzerland	5 456	1.6%	5 090	1.6%	5 500	1.6%	5 141	1.7%	3 064	1.5%	+ 9.7%
Serbia	425	0.1%	439	0.1%	557	0.2%	575	0.2%	712	0.4%	+++
Canada	780	0.2%	428	0.1%	421	0.1%	514	0.2%	519	0.3%	+ 68.7%
Japan	100	0.0%	359	0.1%	578	0.2%	698	0.2%	382	0.2%	+ 4.9%
Other Origins	3 488	1.0%	1 810	0.6%	2 063	0.6%	1 890	0.6%	802	0.4%	
Extra-EU	332 362		323 099		333 884		306 313		202 134		
% change			- 3%		+ 3%		- 8%		+ 18.3%		

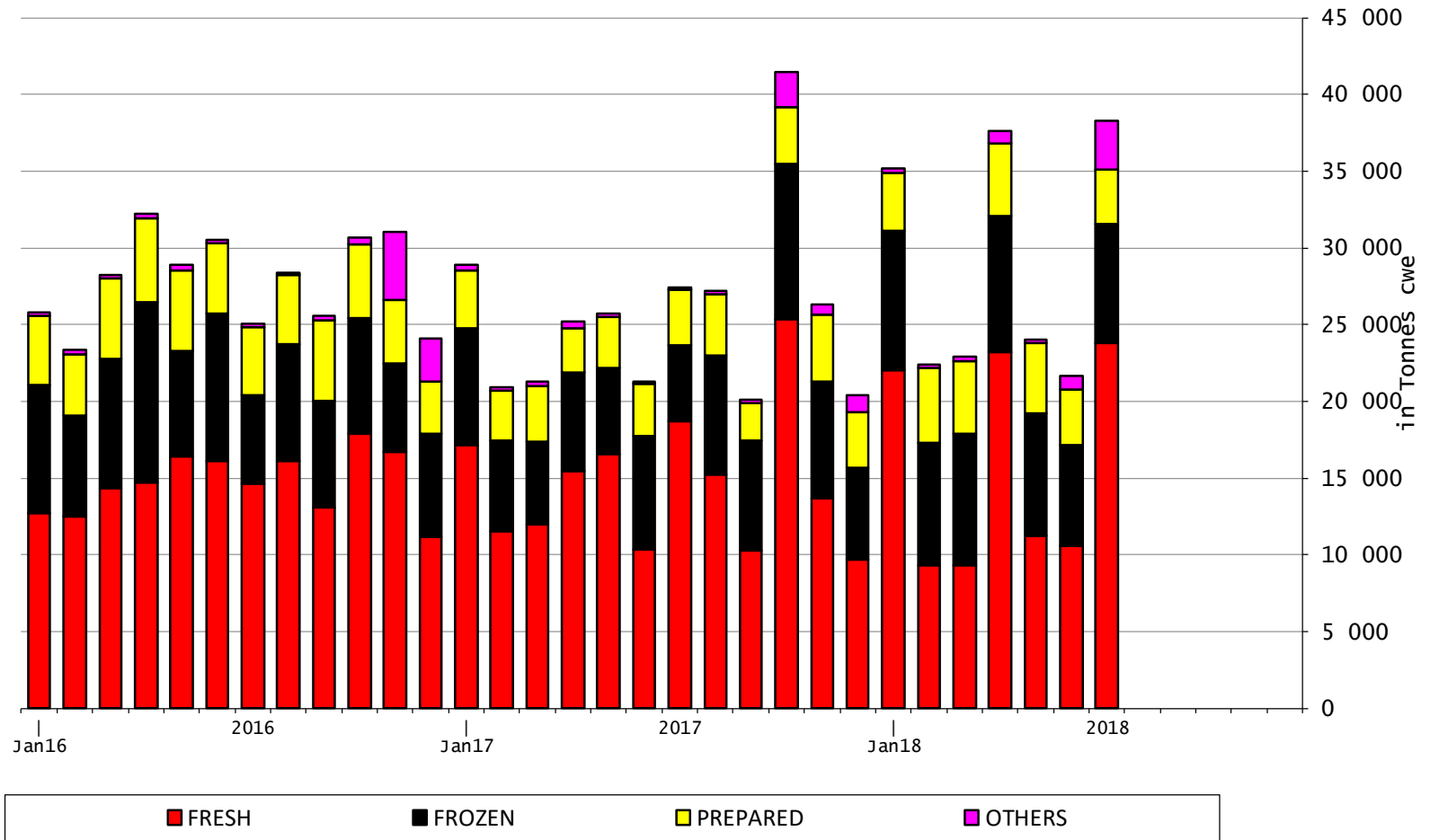
EU imports of beef and live animals (2): Trade figures (COMEXT)



TRADE

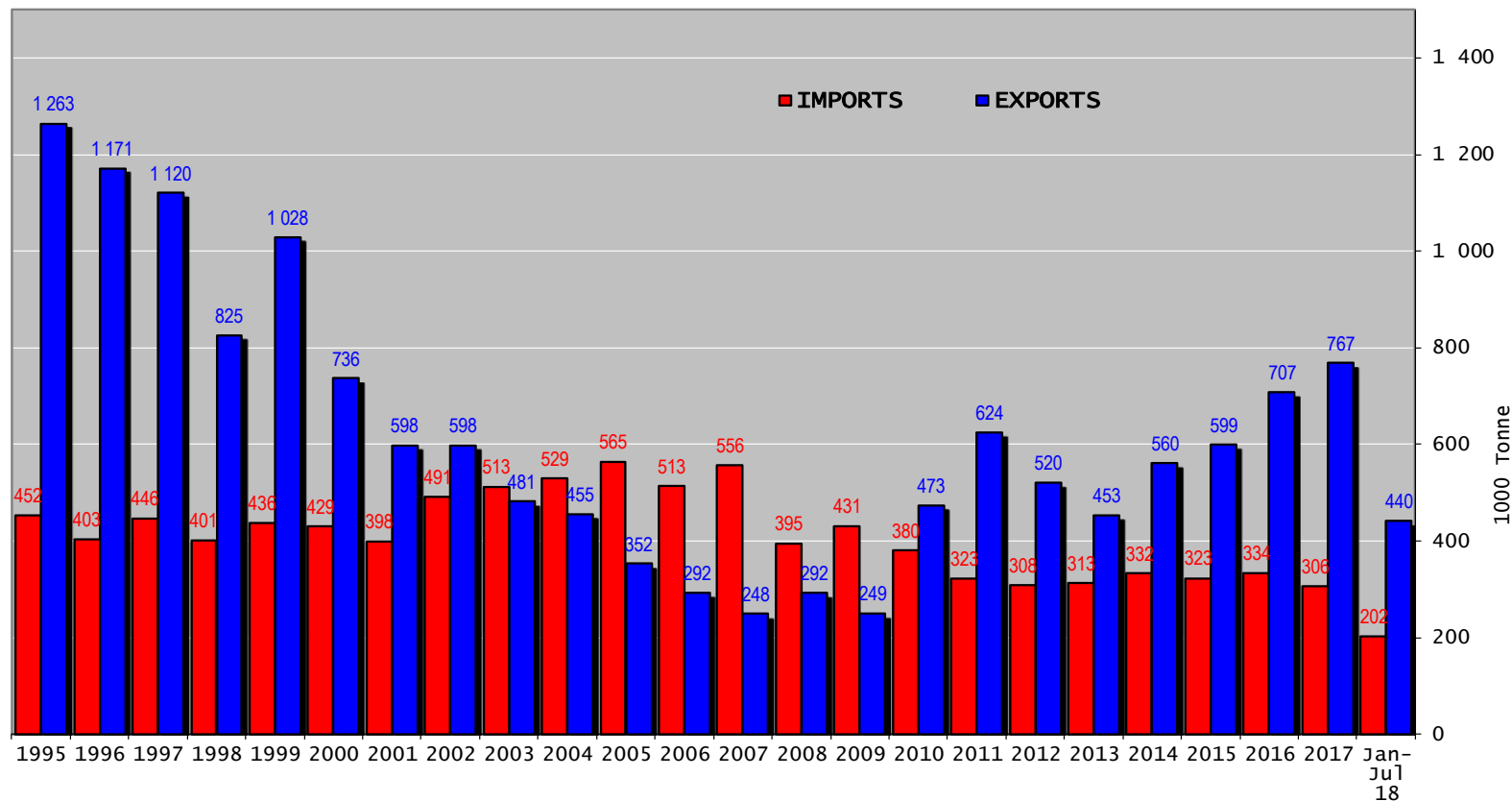
EU IMPORTS Beef Products

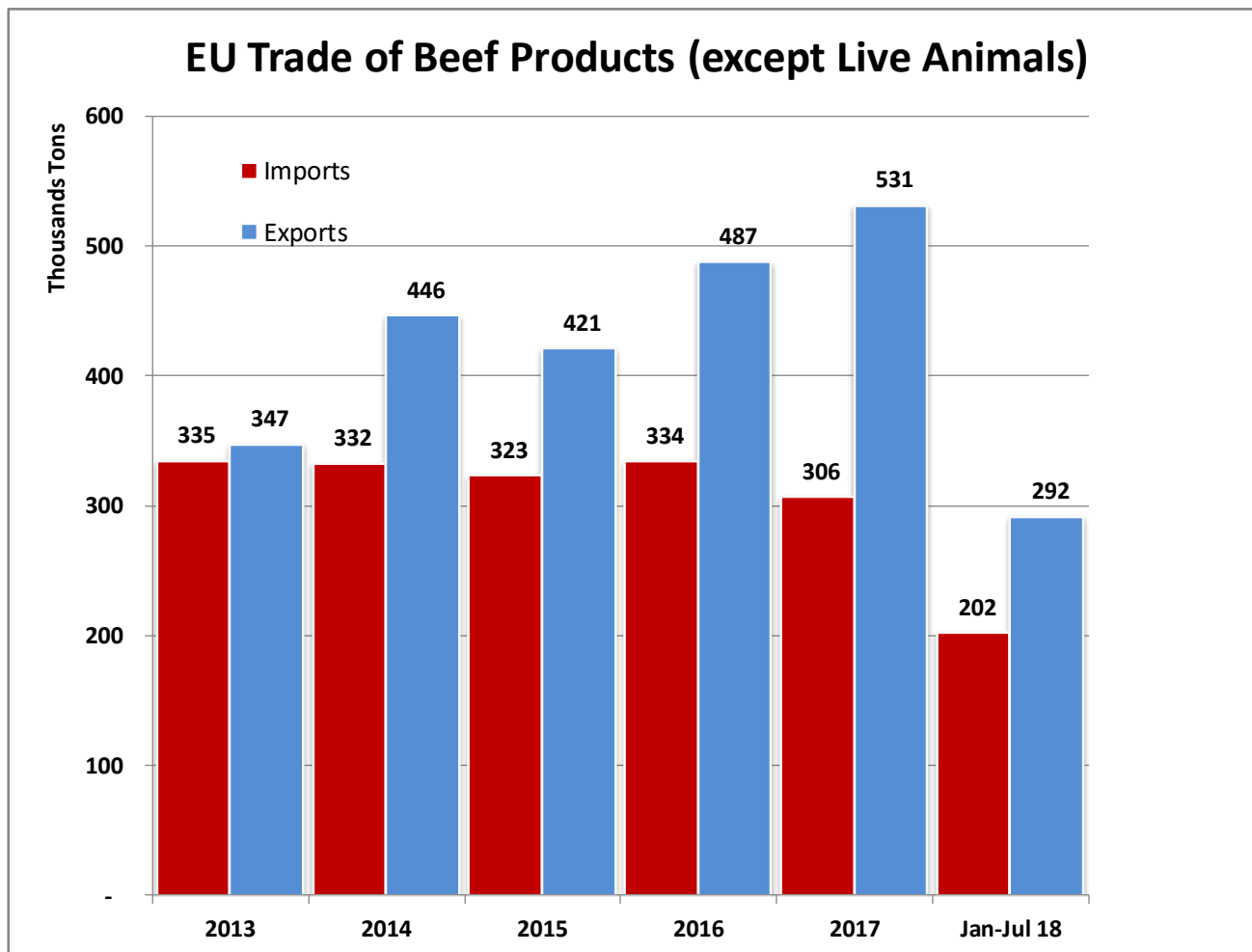
EU-28 Imports of BEEF products



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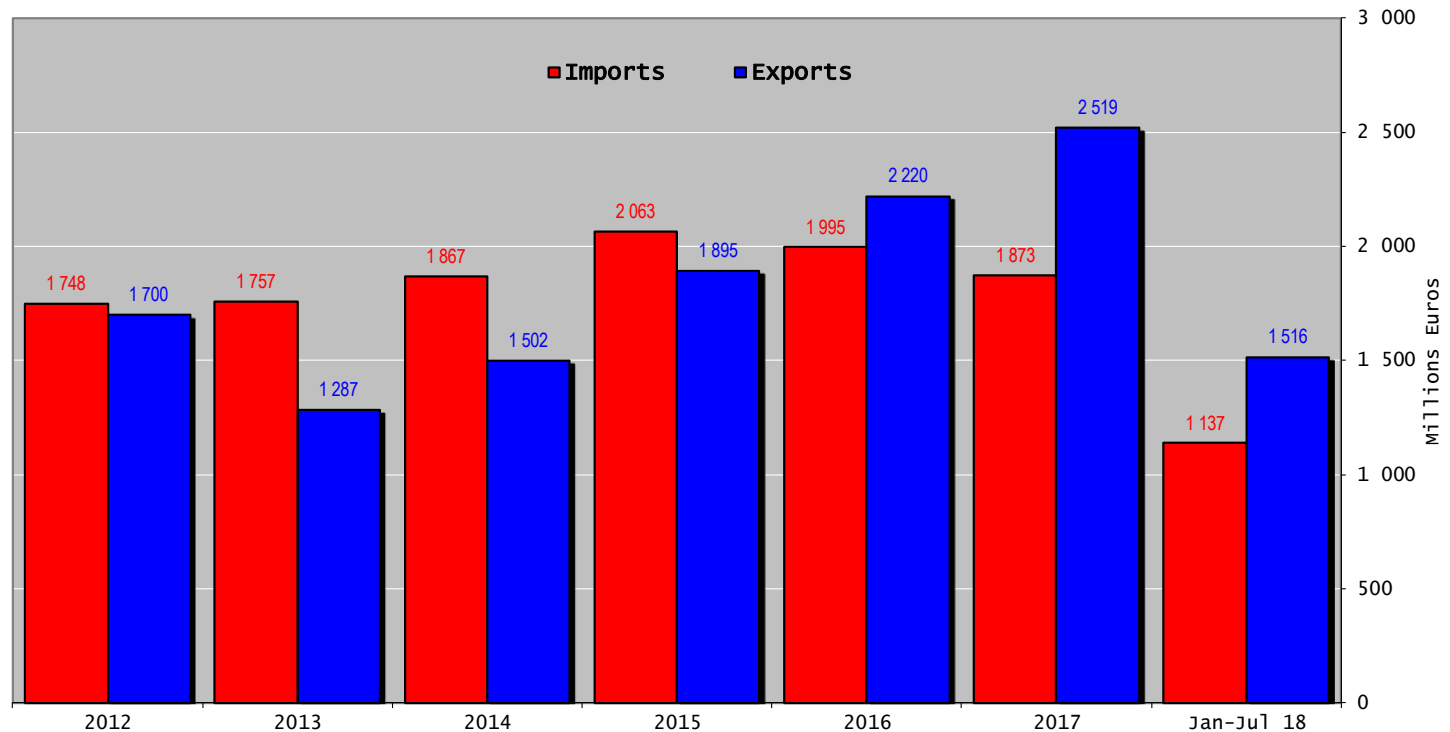
Trade balance of beef and live animals

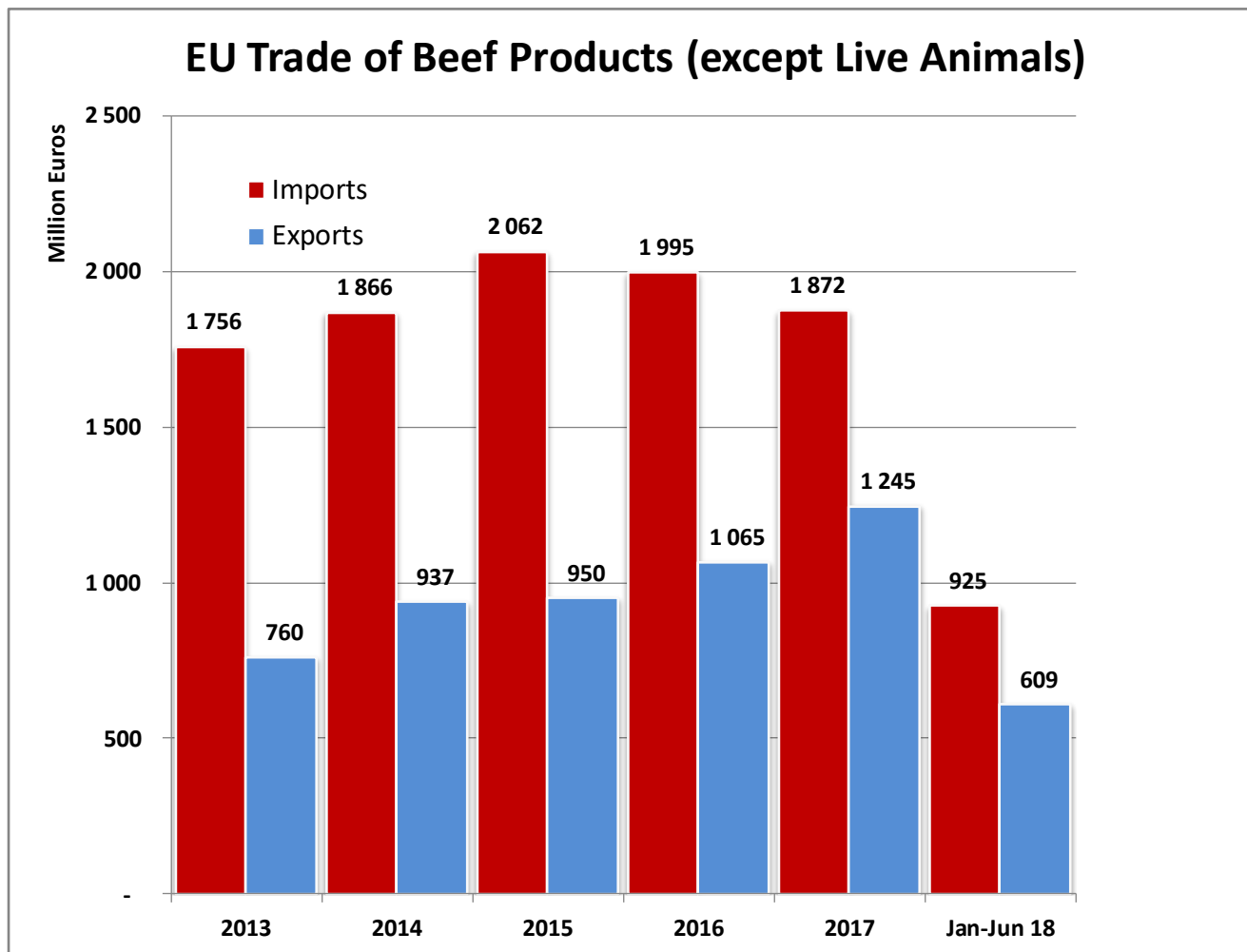




2 October 2018

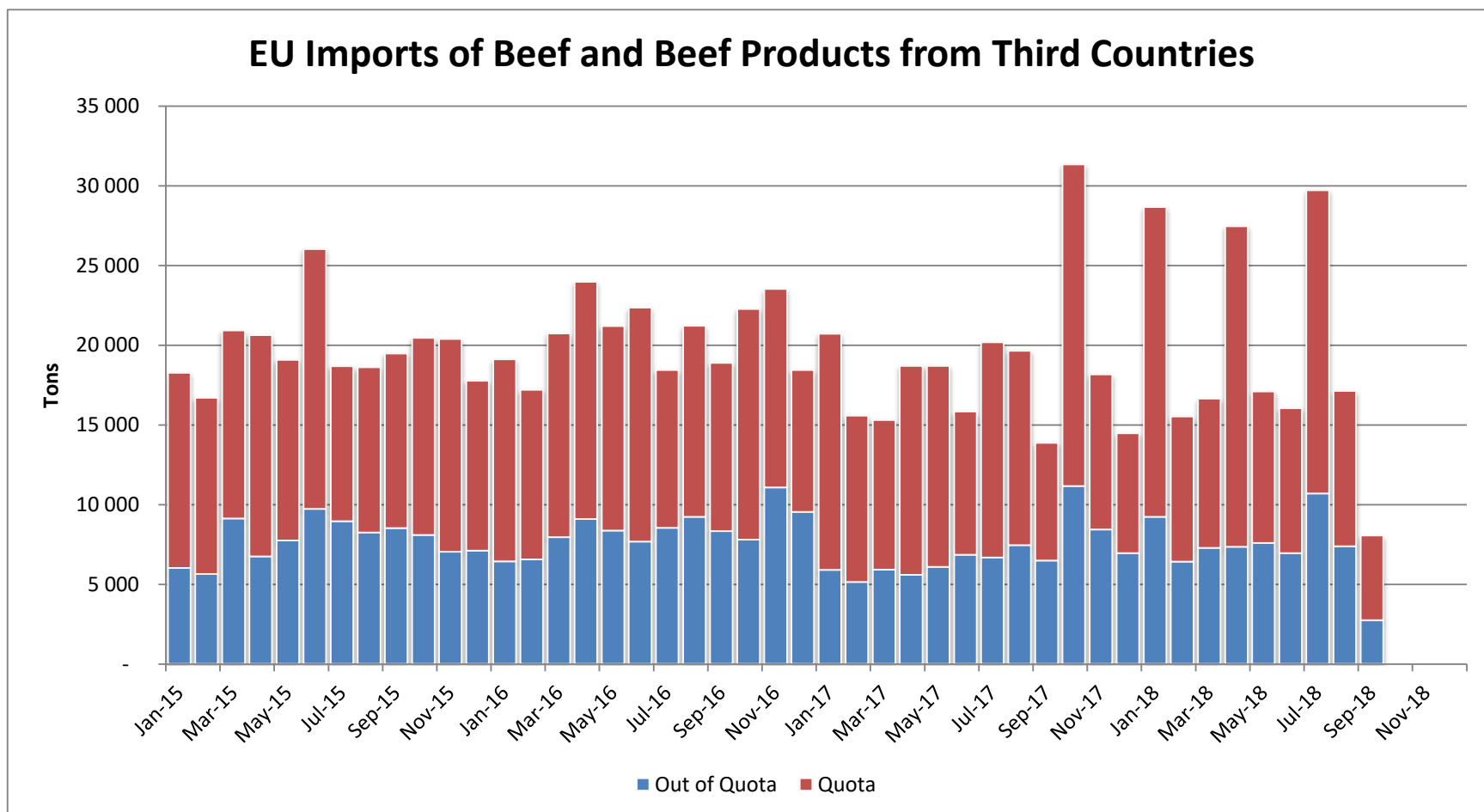
Trade balance of beef and live animals





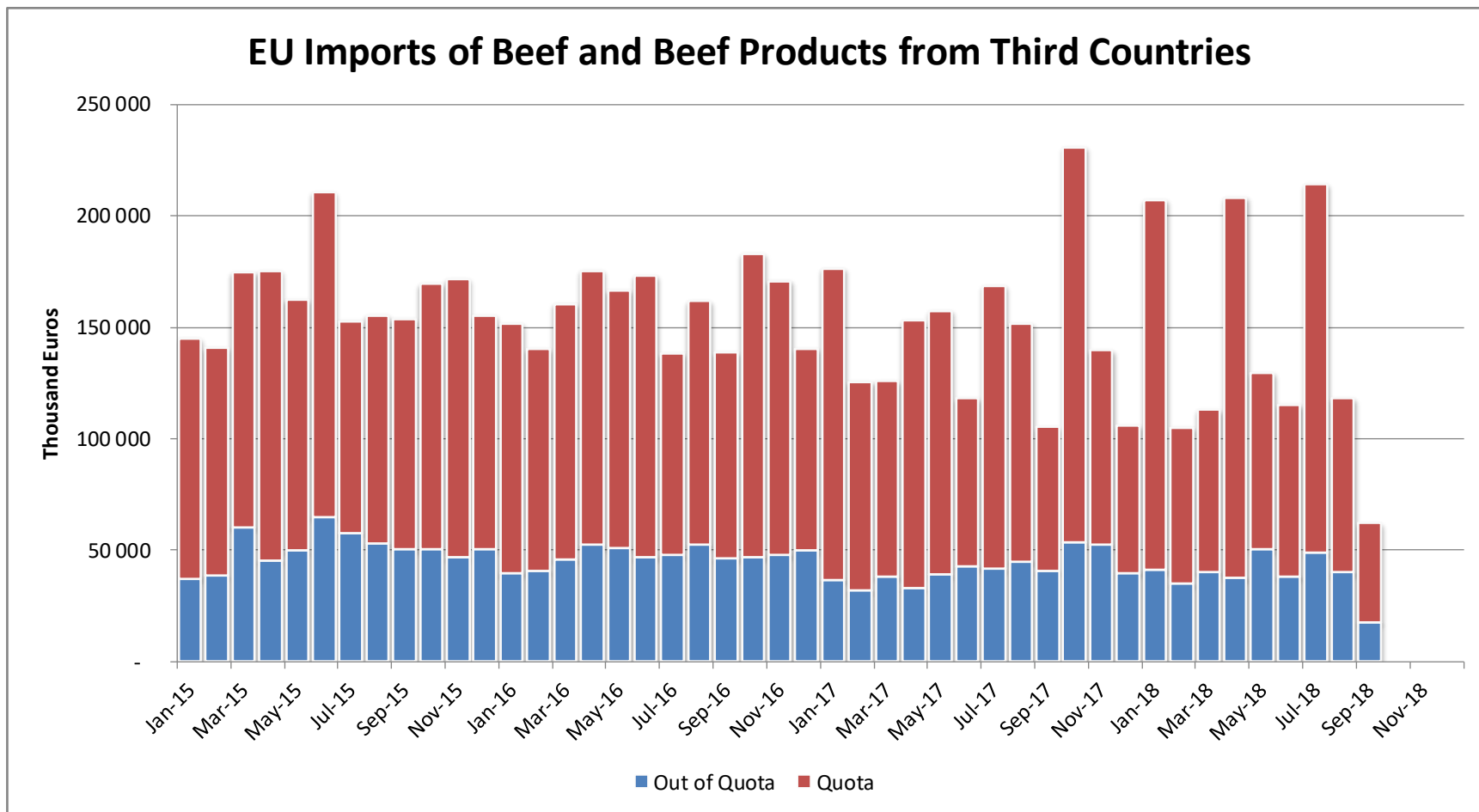
2 October 2018

Imports in and out TRQs



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Imports in and out TRQs



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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%	2.55	1.28%
09.4450	Argentina	29 500	23 111.89	78.35%	28 091.29	95.22%	3 576.20	12.12%
09.4451	Australia	7 150	4 051.04	56.66%	5 333.48	74.59%	1 375.57	19.24%
09.4452	Uruguay	6 376	6 365.55	99.84%	6 363.24	99.80%	723.91	11.35%
09.4453	Brazil	10 000	8 572.40	85.72%	5 057.27	50.57%	206.31	2.06%
09.4454	New Zealand	1 300	1 161.63	89.36%	1 122.25	86.33%	250.42	19.26%
09.4002	Canada/US	11 500	421.40	3.66%	2 351.37	20.45%	956.92	8.32%
09.4455	Paraguay	1 000	982.60	98.26%	962.21	96.22%	102.60	10.26%
Total Beef		66 826	44 666.51	66.84%	49 281.11	73.75%	7 191.93	10.76%
Total Buffalo		2 450	12.75	0.52%	14.67	0.60%	2.55	0.10%
Total		69 276	44 679.26	64.49%	49 295.78	71.16%	7 194.48	10.39%

* up to 31/07/2018

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%	

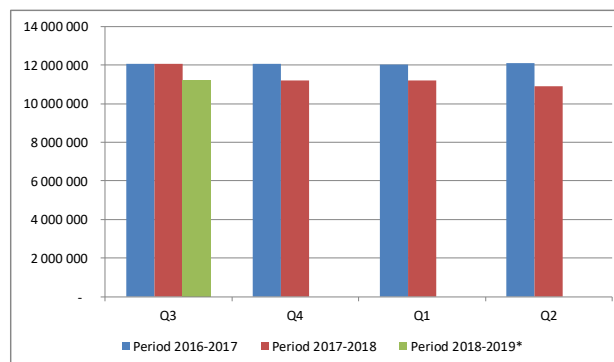
	2015-Q3	2015-Q4	2016-Q1	2016-Q2	TOTAL
Period 2015-2016	11 952 185	11 851 187	11 535 011	12 664 673	48 003 056
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	99.19%	98.35%	95.73%	105.10%	99.59%
Available after transfer	12 050 000	12 147 815	12 346 627	12 861 617	
	99.19%	97.56%	93.43%	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	11 195 874	11 183 552	10 897 594	45 328 835
Available	12 050 000	11 161 000	11 250 000	11 250 000	45 711 000
Use	100.00%	100.00%	99.41%	96.87%	99.16%
Available after transfer	12 050 000	11 159 185	11 215 126	11 316 448	
	100.00%	100.00%	99.72%	96.30%	

	2018-Q3	2018-Q4	2019-Q1	2019-Q2	TOTAL
Period 2018-2019*	11 216 758	-	-	-	11 216 758
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.70%				24.93%
Available after transfer	11 250 000				
	99.70%				

* Until 17.09.2018

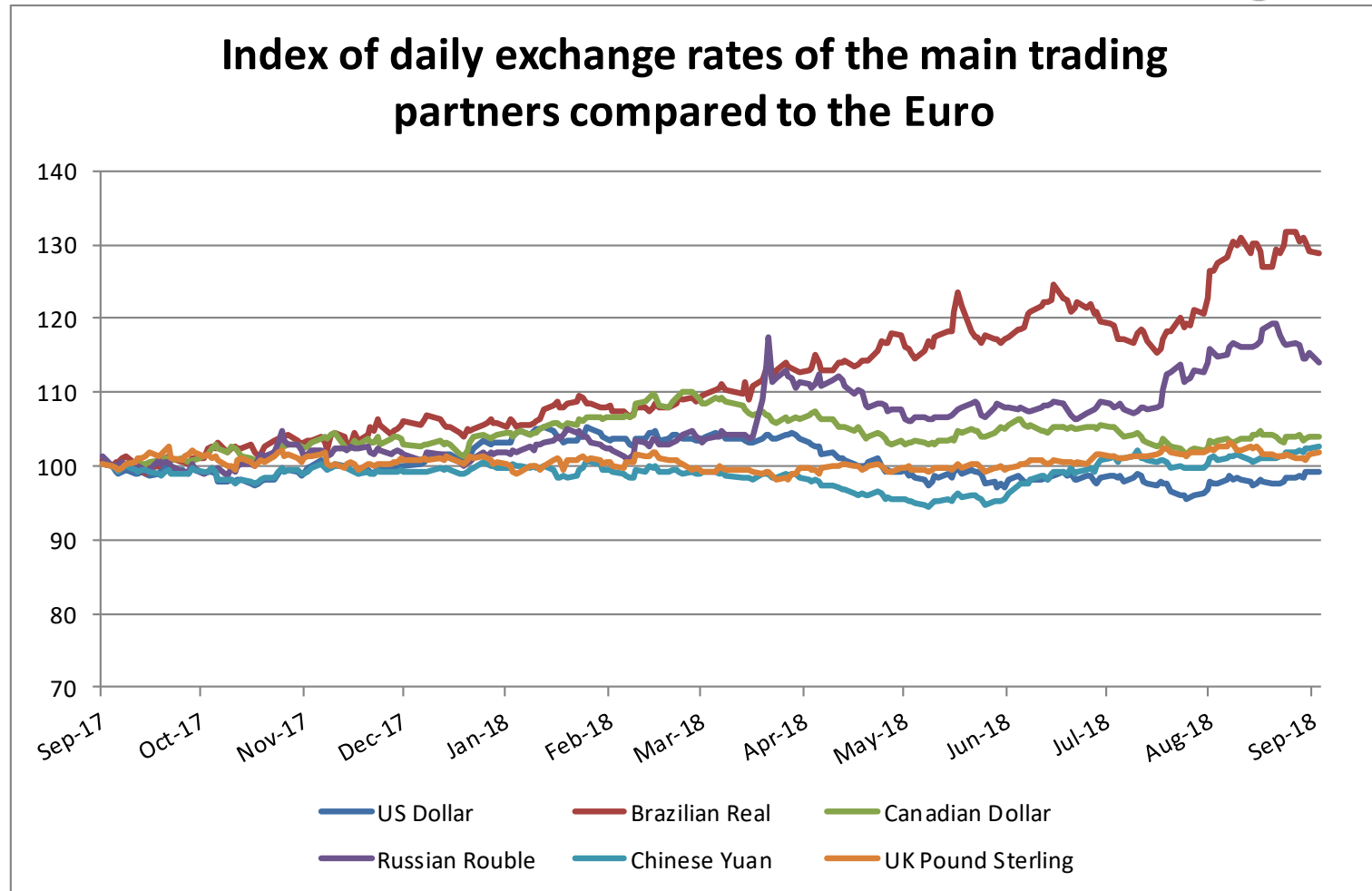


2 October 2018

WORLD BEEF MARKET

EXCHANGE RATE INDEX / Euro

Main Trading Partners



Source : ECB

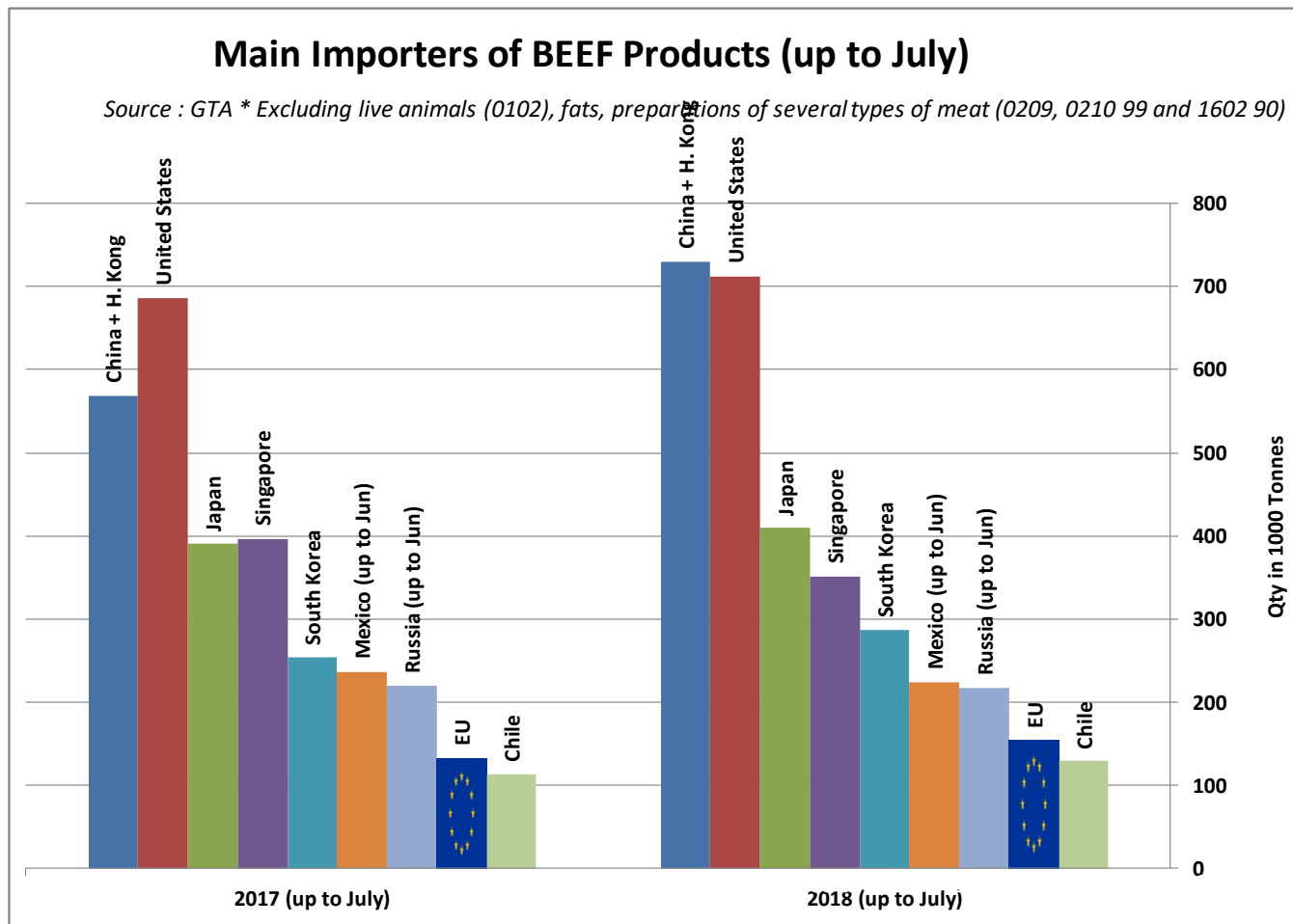
2 October 2018

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)



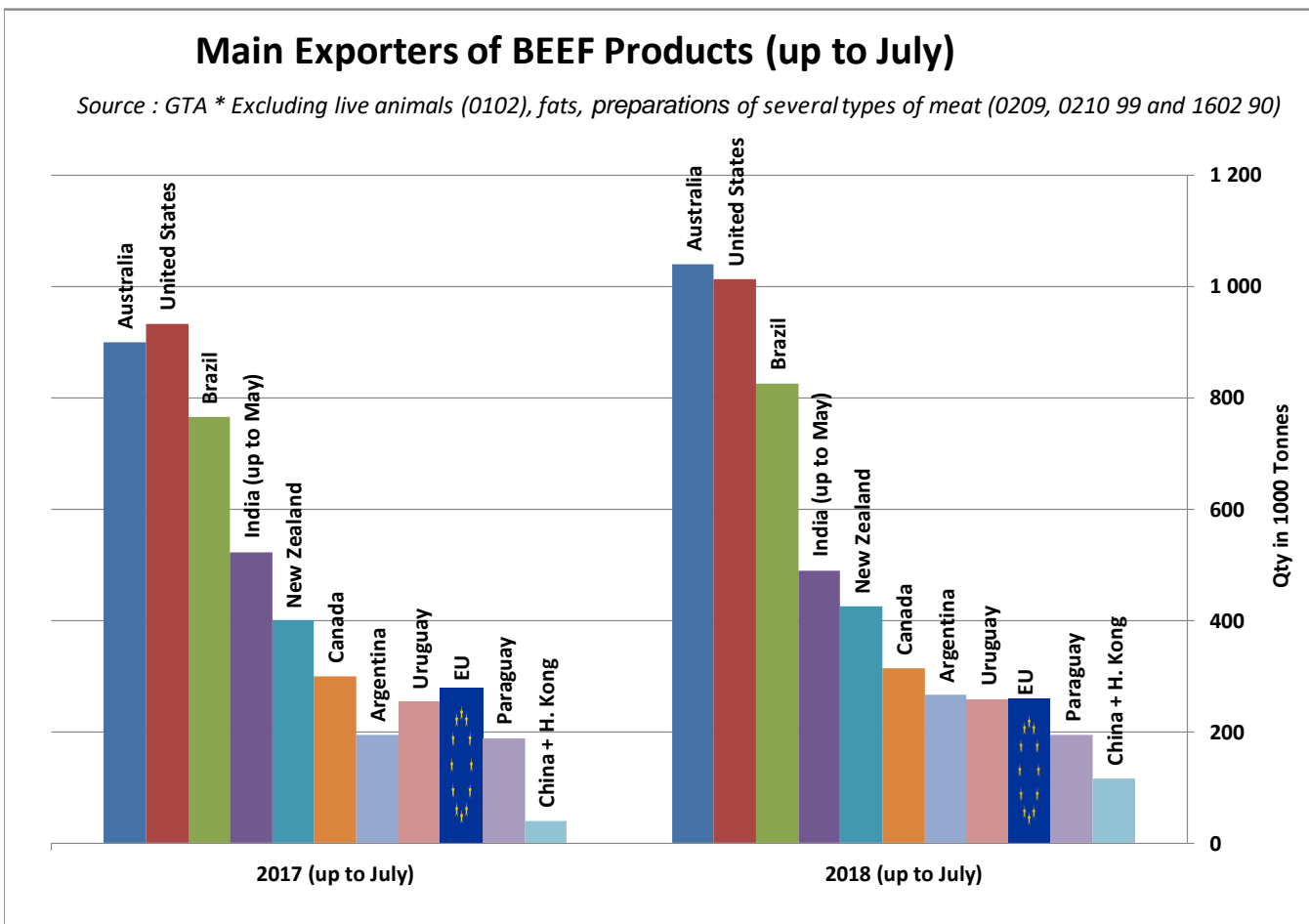
2 October 2018

WORLD BEEF MARKET

E.U. EXPORTS BEEF MAIN EXPORTERS

Source : GTA

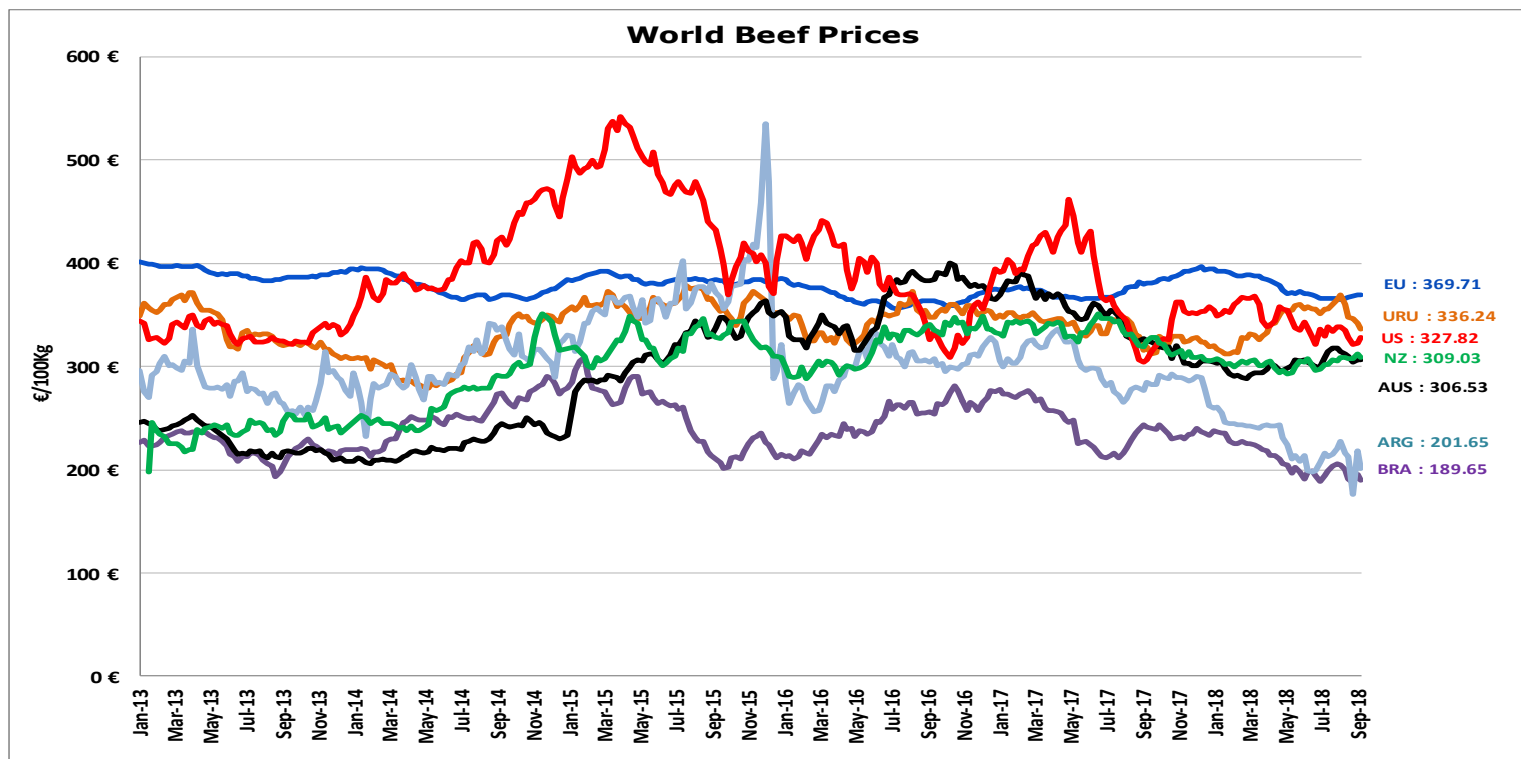
* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



2 October 2018

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>
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2 October 2018