



BEEF & VEAL MARKET SITUATION



Meat market observatory 4 June 2024

LIVESTOCK

DECEMBER SURVEY

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2023 2022	BOVINE < 1 Year				%Var 2023 2022	BOVINE 1-2 Year				%Var 2023 2022	BOVINE > 2 Year				%Var 2023 2022
	2020	2021	2022	2023		2020	2021	2022	2023		2020	2021	2022	2023		2020	2021	2022	2023	
BE	2 335	2 310	2 286	2 236	-2.2%	712	713	694	681	-1.8%	461	454	454	439	-3.3%	1 163	1 143	1 138	1 116	-2.0%
BG	589	611	580	574	-1.0%	112	121	108	109	+0.6%	71	67	70	67	-3.4%	406	423	402	398	-1.0%
CZ	1 340	1 359	1 390	1 370	-1.5%	405	408	407	408	+0.3%	295	296	314	304	-3.4%	640	655	669	658	-1.7%
DK	1 500	1 480	1 466	1 435	-2.1%	524	516	510	496	-2.8%	279	280	281	279	-0.8%	697	684	675	661	-2.1%
DE	11 302	11 040	10 997	10 836	-1.5%	3 405	3 355	3 308	3 225	-2.5%	2 639	2 569	2 600	2 572	-1.1%	5 258	5 116	5 089	5 039	-1.0%
EE	253	251	250	241	-3.3%	72	69	69	67	-3.3%	49	51	49	47	-4.3%	132	131	132	128	-2.9%
IE	6 529	6 649	6 552	6 526	-0.4%	2 057	2 108	1 995	1 974	-1.1%	1 708	1 775	1 810	1 805	-0.3%	2 765	2 766	2 746	2 748	+0.1%
EL	632	614	582	575	-1.2%	162	176	156	157	+0.8%	145	114	107	99	-7.3%	325	324	319	318	-0.2%
ES	6 636	6 576	6 455	6 295	-2.5%	2 541	2 319	2 489	2 336	-6.1%	853	1 016	785	834	+6.3%	3 242	3 240	3 181	3 124	-1.8%
FR	17 816	17 330	16 986	16 807	-1.1%	5 119	4 945	4 868	4 783	-1.7%	3 063	3 021	2 992	3 003	+0.4%	9 634	9 364	9 127	9 021	-1.2%
HR	423	428	422	415	-1.7%	146	156	149	145	-2.7%	111	107	112	115	+2.7%	166	165	161	155	-3.7%
IT	6 400	6 280	6 049	5 999	-0.8%	1 774	1 722	1 563	1 577	+0.9%	1 595	1 562	1 520	1 517	-0.2%	3 031	2 997	2 966	2 904	-2.1%
CY	83	85	81	82	+1.0%	27	27	25	25	-0.7%	14	15	15	14	-2.0%	42	43	42	43	+3.1%
LV	399	393	391	368	-6.0%	112	107	107	101	-6.2%	65	68	66	60	-9.0%	222	219	219	208	-4.9%
LT	630	629	642	624	-2.9%	169	166	173	165	-4.9%	129	135	130	131	+0.7%	332	328	339	328	-3.2%
LU	191	187	186	184	-1.4%	50	49	48	46	-4.3%	41	40	41	40	-2.0%	100	98	98	98	+0.3%
HU	933	910	894	870	-2.7%	266	269	258	260	+0.9%	195	153	159	150	-5.7%	472	487	477	460	-3.7%
MT	14	14	14	14	+0.2%	4	4	4	4	+0.9%	3	3	3	3	+6.1%	7	7	7	7	-2.8%
NL	3 691	3 705	3 751	3 723	-0.7%	1 510	1 519	1 536	1 511	-1.6%	465	482	496	508	+2.4%	1 716	1 704	1 719	1 704	-0.9%
AT	1 855	1 870	1 861	1 835	-1.4%	599	611	597	577	-3.3%	414	421	430	427	-0.8%	842	838	834	832	-0.3%
PL	6 279	6 379	6 448	6 436	-0.2%	1 735	1 802	1 929	1 920	-0.5%	1 800	1 915	1 699	1 666	-1.9%	2 744	2 662	2 821	2 850	+1.0%
PT	1 691	1 641	1 579	1 528	-3.3%	526	528	516	492	-4.7%	257	214	201	208	+3.7%	909	899	862	828	-4.0%
RO	1 875	1 827	1 834	1 816	-0.9%	369	347	347	343	-1.0%	225	222	228	225	-1.1%	1 281	1 258	1 259	1 248	-0.9%
SI	486	483	465	456	-1.9%	153	157	149	145	-3.0%	133	131	130	126	-3.3%	199	195	186	186	-0.0%
SK	442	434	433	430	-0.8%	126	125	124	119	-4.0%	87	82	83	85	+2.3%	229	228	225	225	-0.2%
FI	835	830	822	799	-2.8%	292	287	283	274	-3.2%	199	205	203	198	-2.6%	344	338	336	327	-2.6%
SE	1 391	1 390	1 391	1 369	-1.5%	464	460	461	452	-2.0%	323	334	333	332	-0.2%	603	596	597	585	-2.0%
EU	76 551	75 705	74 808	73 841	-1.3%	23 428	23 065	22 872	22 390	-2.1%	15 621	15 732	15 308	15 252	-0.4%	37 503	36 908	36 627	36 197	-1.2%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2022 AND 2023

LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION
TOTAL BOVINE

Dec 1000 Hd	TOTAL COWS				%Var 2023 2022	DAIRY COWS				%Var 2023 2022	OTHER COWS				%Var 2023 2022
	2020	2021	2022	2023		2020	2021	2022	2023		2020	2021	2022	2023	
BE	921	917	913	891	-2.5%	538	537	544	534	-1.7%	383	379	370	356	-3.6%
BG	382	397	376	371	-1.5%	242	230	213	201	-5.7%	140	166	163	170	+3.9%
CZ	560	574	579	568	-1.8%	357	362	357	358	+0.3%	203	212	223	211	-5.3%
DK	646	635	627	613	-2.2%	565	559	556	547	-1.6%	80	76	70	66	-5.5%
DE	4 548	4 445	4 420	4 338	-1.9%	3 921	3 833	3 810	3 713	-2.5%	626	612	610	625	+2.5%
EE	116	115	114	112	-2.1%	84	84	84	83	-0.5%	32	31	31	29	-6.6%
IE	2 379	2 395	2 372	2 329	-1.8%	1 456	1 505	1 510	1 511	+0.0%	923	890	862	819	-5.0%
EL	210	213	227	225	-0.9%	90	91	81	79	-1.7%	120	122	147	146	-0.5%
ES	2 909	2 900	2 888	2 841	-1.6%	811	809	810	786	-3.0%	2 099	2 091	2 078	2 055	-1.1%
FR	7 379	7 204	7 020	6 904	-1.7%	3 406	3 322	3 231	3 165	-2.1%	3 974	3 882	3 790	3 740	-1.3%
HR	144	142	138	131	-5.1%	110	102	79	71	-10.1%	34	40	59	60	+1.7%
IT	2 243	2 193	2 348	2 289	-2.5%	1 871	1 844	1 865	1 808	-3.1%	372	349	483	481	-0.4%
CY	40	40	38	39	+1.3%	39	39	38	39	+1.2%	0	1	0	0	+100.0%
LV	196	193	191	181	-5.1%	136	131	128	119	-6.8%	60	61	63	62	-1.6%
LT	295	290	291	281	-3.5%	233	225	224	212	-5.4%	62	65	67	69	+3.2%
LU	78	78	77	77	-0.6%	54	55	55	55	-0.2%	24	23	22	22	-1.6%
HU	414	423	421	406	-3.7%	247	281	278	266	-4.5%	167	142	143	140	-2.2%
MT	6	6	6	6	-2.9%	6	6	6	6	-3.1%	0	0	0	0	idem
NL	1 612	1 599	1 614	1 591	-1.4%	1 569	1 554	1 570	1 546	-1.5%	43	45	44	45	+2.3%
AT	715	712	708	700	-1.2%	525	526	551	543	-1.4%	191	186	158	157	-0.7%
PL	2 391	2 289	2 172	2 204	+1.5%	2 126	2 035	2 037	2 069	+1.5%	266	254	135	135	+0.5%
PT	739	739	715	690	-3.4%	233	230	222	219	-1.2%	507	509	493	471	-4.4%
RO	1 145	1 116	1 112	1 102	-0.9%	1 122	1 082	1 076	1 067	-0.8%	23	34	36	36	-1.9%
SI	167	165	158	155	-1.9%	99	101	93	95	+1.5%	68	65	64	60	-6.9%
SK	192	191	190	188	-0.9%	122	120	117	115	-1.7%	69	71	73	73	+0.4%
FI	316	311	306	299	-2.5%	256	249	243	236	-2.8%	61	62	63	62	-1.6%
SE	499	497	496	484	-2.5%	304	300	298	289	-2.9%	194	197	199	195	-1.9%
EU	31 241	30 778	30 519	30 014	-1.7%	20 522	20 213	20 074	19 729	-1.7%	10 718	10 565	10 445	10 285	-1.5%

Source : EStat Newcronos

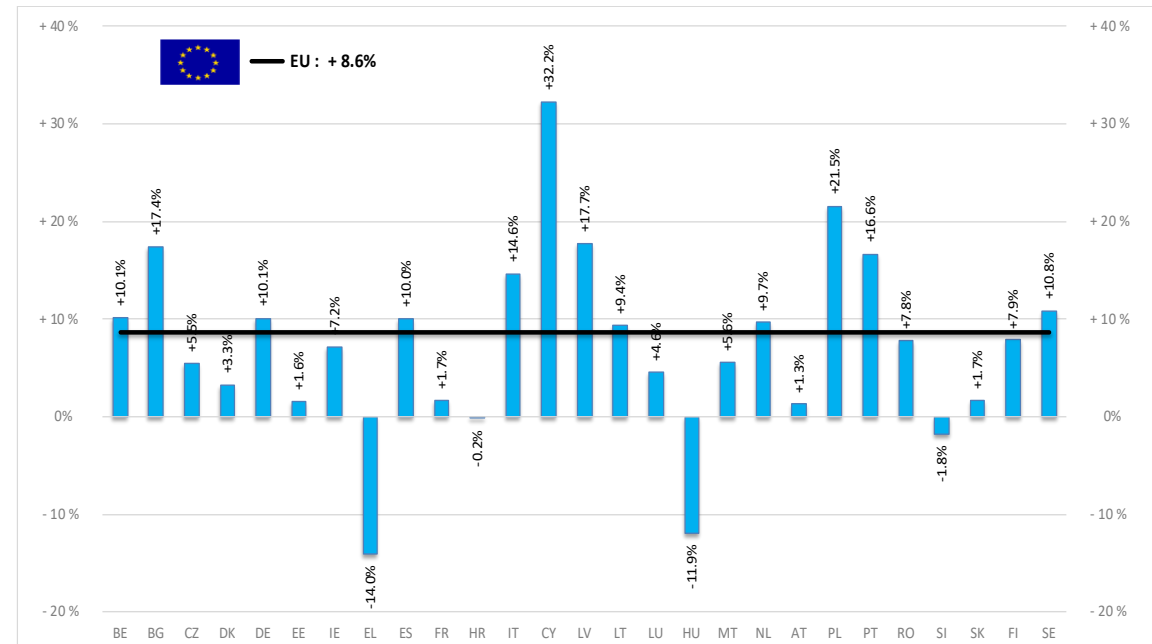
EU %Var is calculated considering only countries available in 2022 AND 2023

PRODUCTION % EVOLUTION

HEADS	Jan-Feb 24/23	TONNES	Jan-Feb 24/23
	EU		EU
Bull	+10,1%	Bull	+9.7%
Bullock	+8,2%	Bullock	+7.7%
Cow	+8,4%	Cow	+8.7%
Heifer	+11,3%	Heifer	+11.6%
Calve	+5,7%	Calve	+7.9%
Young cattle	-6,0%	Young cattle	-5.1%
Meat of bovine animals	+7,8%	Meat of bovine animals	+8.6%

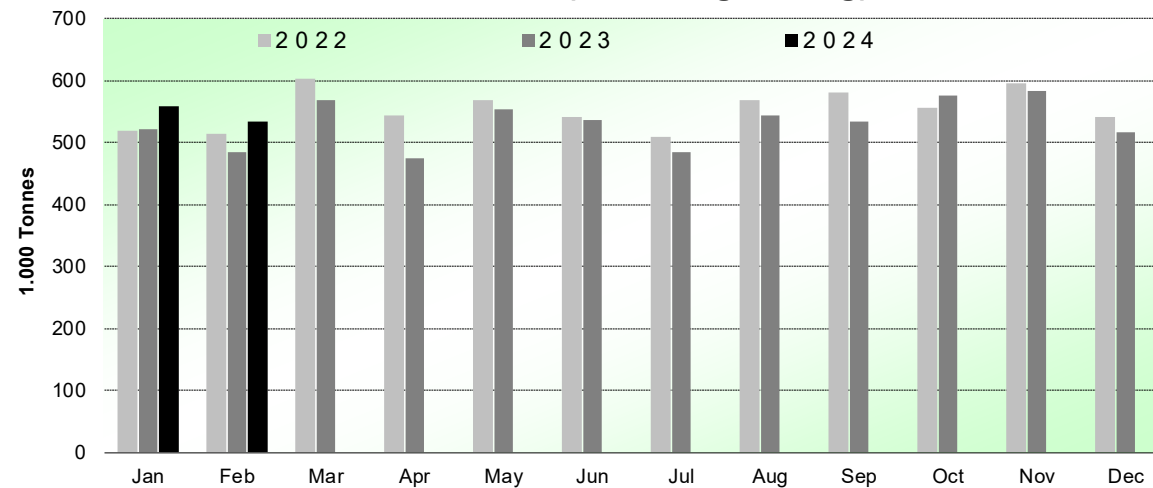
Estimates for last month of period

Estimates for last month of period :



Source : EStat - Newcronos

Beef & Veal Production (EU Slaughtering) - Tonnes



Source : EStat-Newcronos

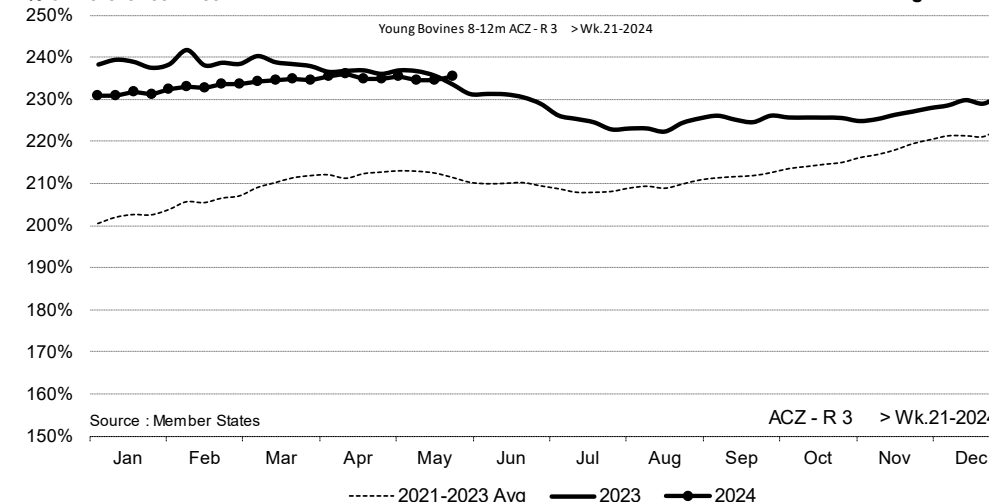
PRICES CARCASSES

EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.21-2024

% of Reference Price

€/100 kg cwe



Price in week 21 : **504,95**

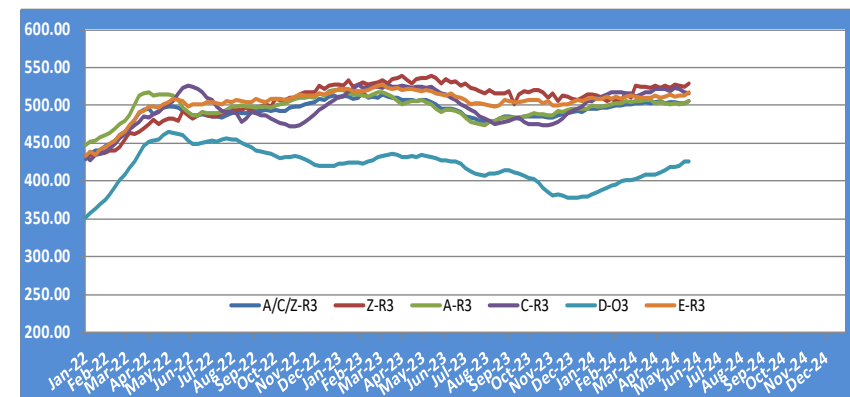
Average price in April 2024 : **504,47**

% change y/y : **+ 0,83%**

% change y/y : **- 0,48%**

% Ref. Price in wk 0 : **225,2%**

EU EVOLUTION ALL CAT GLOBAL VIEW

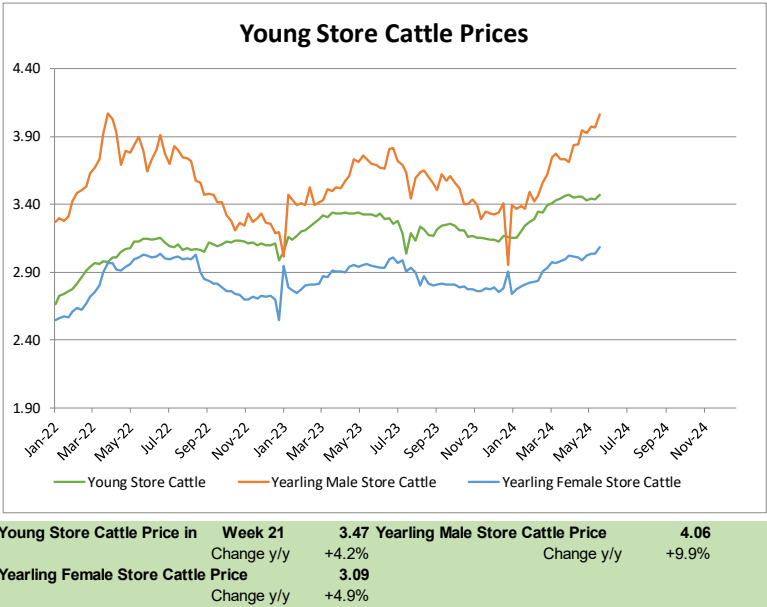


European
Commission

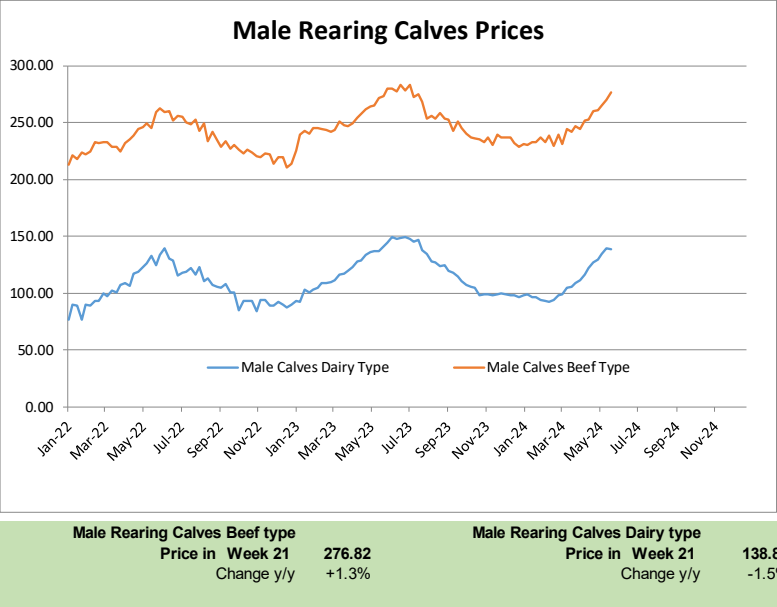
Sources : MSs notifications (Regulation (EU) 1182/2017 and 1184/2017)

PRICES LIVE BOVINES AND CALVES

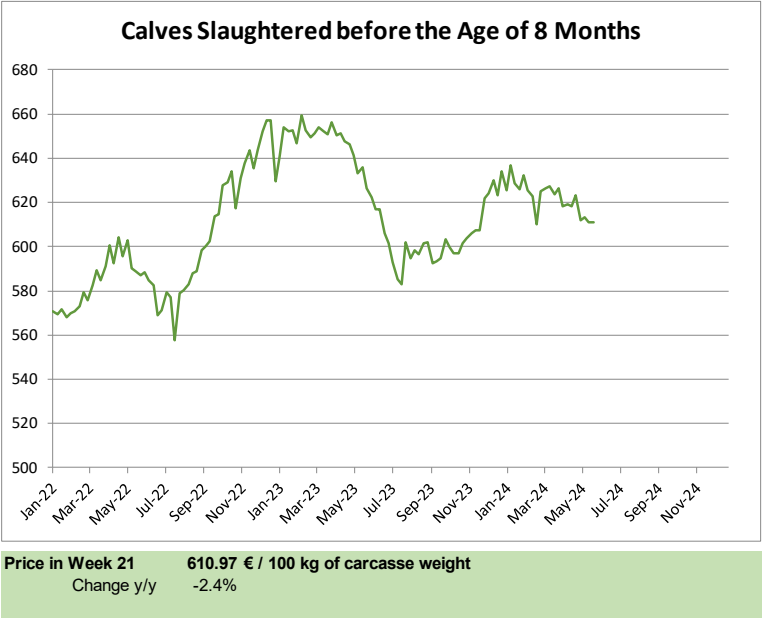
Store cattle (€/100 kg live weight)



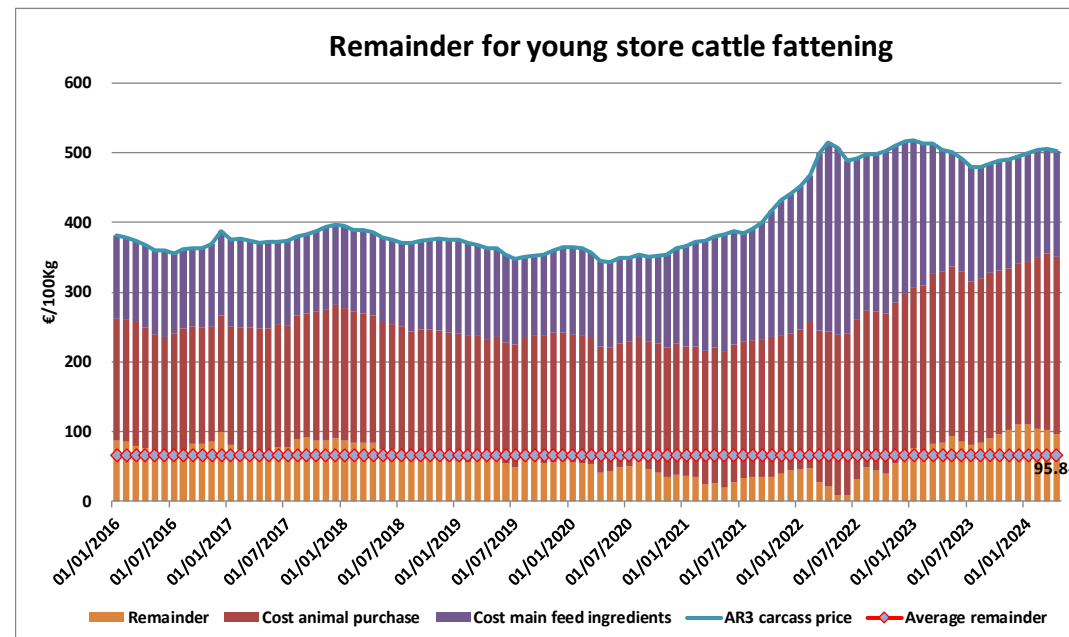
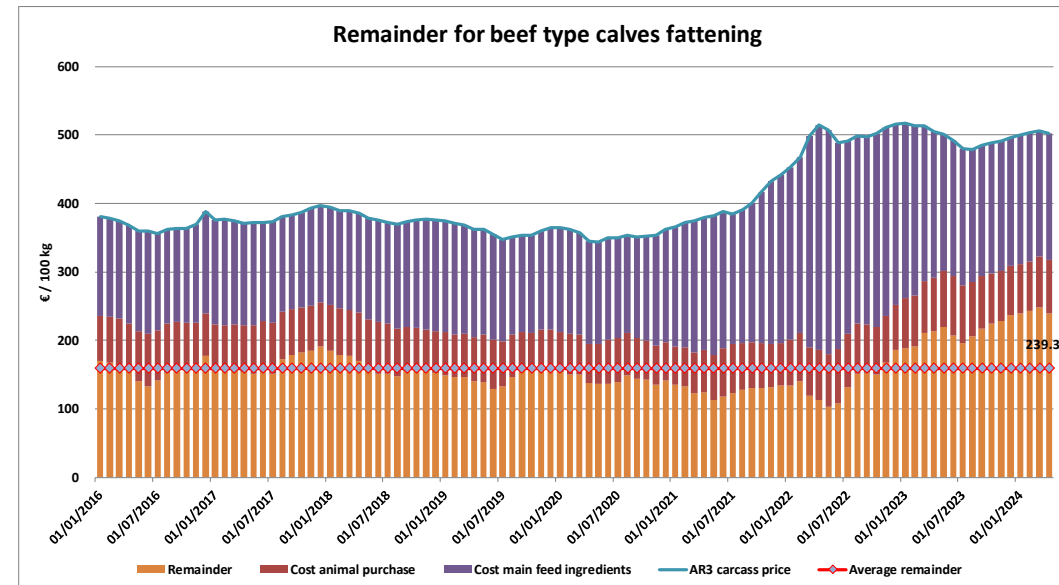
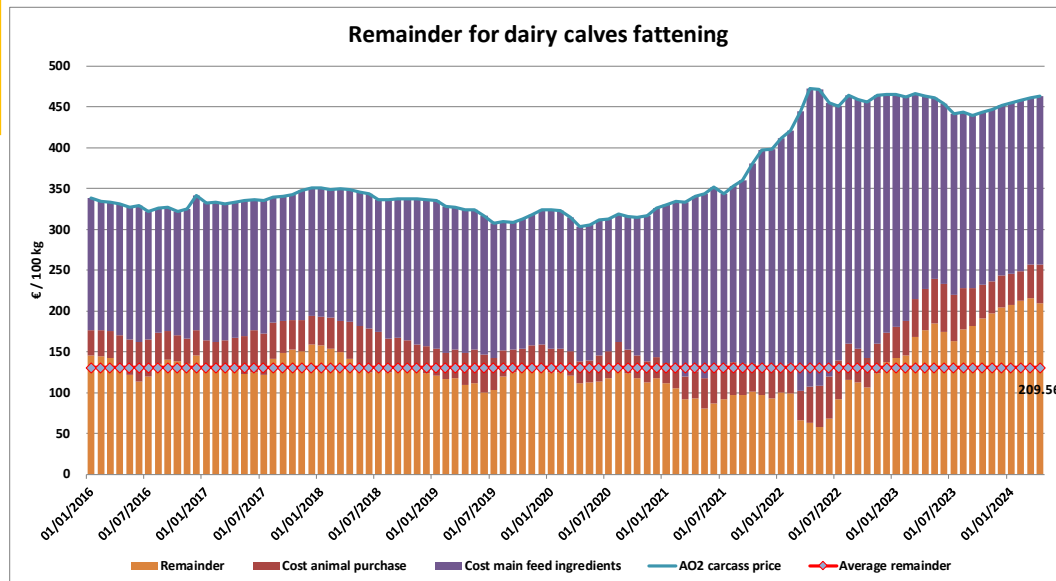
Male calves aged between 8 days and 4 weeks (€/head)



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



REMAINDERS



TRADE

EU EXPORTS Beef & Live Animals

EU Exports of Beef and Live Animals (excluding fats):

In Tons of Carcase Weight

	2022		2023		Jan to Feb 2024		Compared to Jan to Feb 2023
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	366.332	38,9%	363.711	38,1%	60.275	37,3%	-3,7%
Türkiye	14.168	1,5%	90.187	9,5%	15.802	9,8%	+++
Bosnia-Herz.	38.796	4,1%	45.196	4,7%	6.887	4,3%	+32,7%
Israel	63.618	6,7%	45.069	4,7%	6.526	4,0%	-43,6%
Ghana	32.171	3,4%	33.786	3,5%	5.989	3,7%	+27,0%
Lebanon	21.026	2,2%	21.402	2,2%	4.912	3,0%	+++
Ivory Coast	29.882	3,2%	30.141	3,2%	4.834	3,0%	-4,3%
Kosovo	17.069	1,8%	22.677	2,4%	4.084	2,5%	+67,4%
Hong Kong	10.570	1,1%	21.614	2,3%	4.072	2,5%	+12,7%
Philippines	29.922	3,2%	18.605	2,0%	3.587	2,2%	+89,0%
Switzerland	24.958	2,6%	19.359	2,0%	2.841	1,8%	-26,0%
Other Destinations	293.985	31,2%	241.984	25,4%	41.723	25,8%	+21,7%
Extra-EU	942.496		953.730		161.532		+12,2%
% Change				+1,2%			

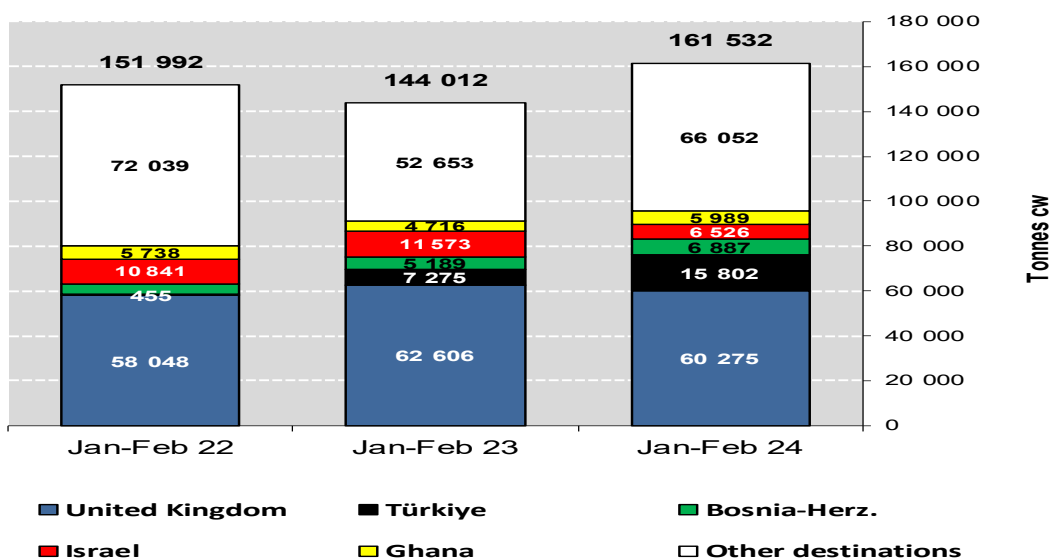
In Thousand Euros

	2022		2023		Jan to Feb 2024		Compared to Jan to Feb 2023
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	1.813.313	41,9%	1.844.299	40,2%	298.917	40,7%	-1,3%
Türkiye	101.973	2,4%	600.850	13,1%	96.155	13,1%	+78,5%
Bosnia-Herz.	161.208	3,7%	191.061	4,2%	29.365	4,0%	+32,4%
Israel	377.934	8,7%	280.427	6,1%	39.385	5,4%	-45,8%
Ghana	35.528	0,8%	35.140	0,8%	6.361	0,9%	+32,5%
Lebanon	110.119	2,5%	118.037	2,6%	27.923	3,8%	+++
Ivory Coast	25.506	0,6%	25.909	0,6%	4.036	0,6%	-6,3%
Kosovo	60.757	1,4%	93.111	2,0%	16.059	2,2%	+62,9%
Hong Kong	33.184	0,8%	45.354	1,0%	8.594	1,2%	+59,2%
Philippines	81.058	1,9%	47.814	1,0%	7.653	1,0%	+41,4%
Switzerland	188.944	4,4%	149.110	3,3%	22.600	3,1%	-14,4%
Other Destinations	1.333.796	30,9%	1.153.541	25,2%	176.546	24,1%	+10,4%
Extra-EU	4.323.321		4.584.654		733.594		+8,6%
% Change				+6,0%			

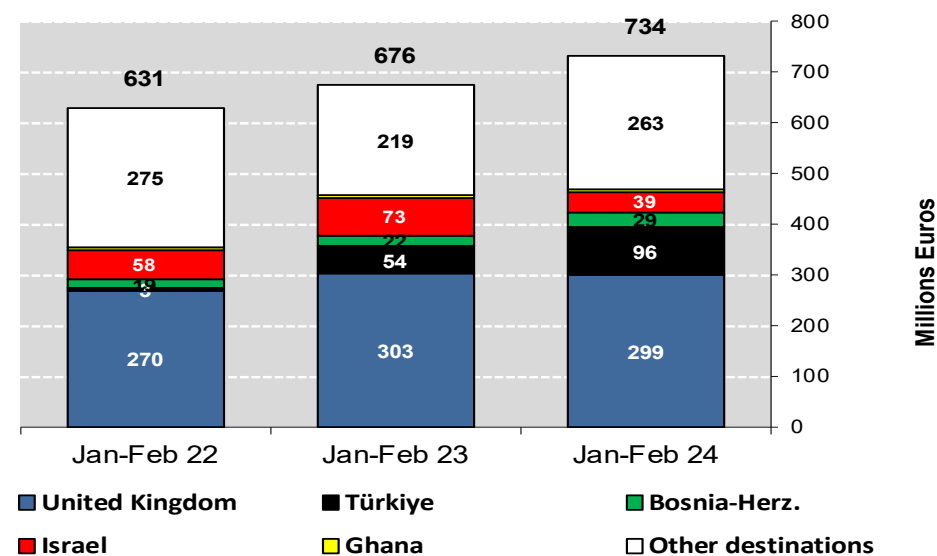
TRADE

EU EXPORTS Beef & Live Animals

EU EXPORTS of Beef & Veal (Tonnes cwe)

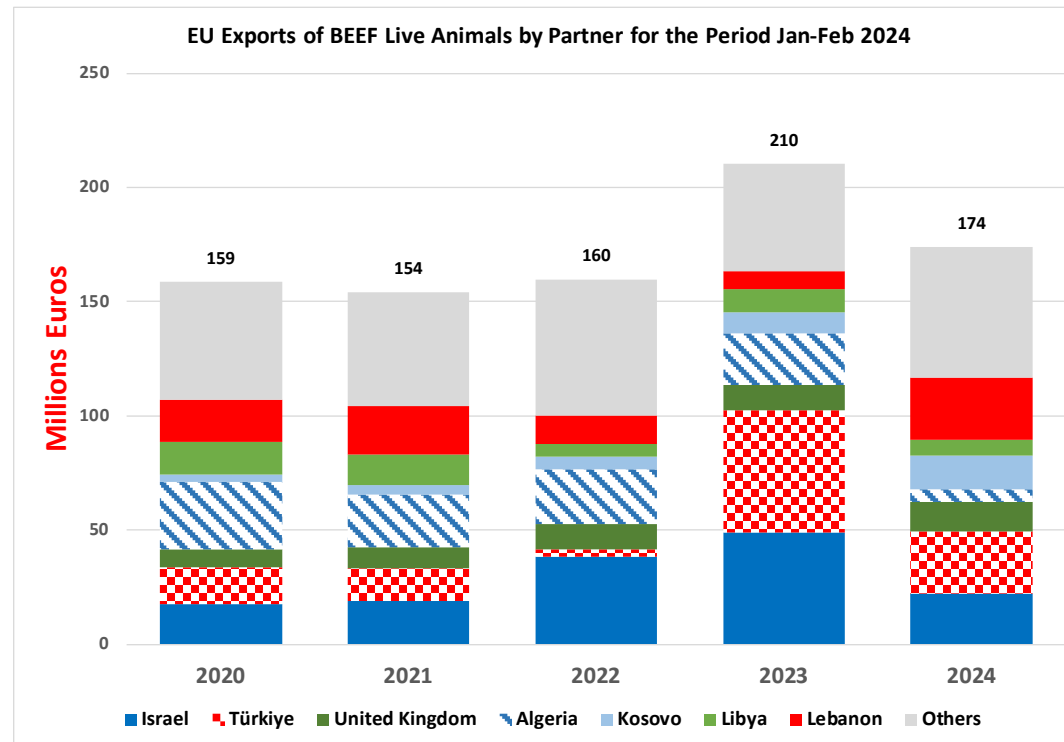
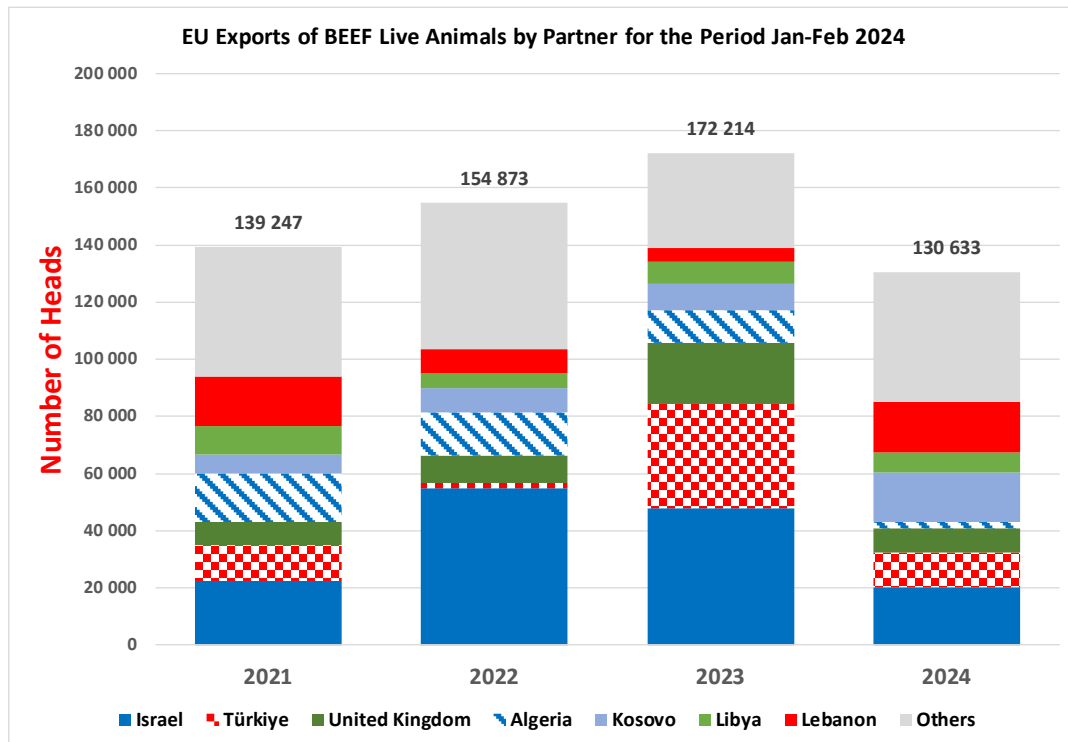


EU EXPORTS of Beef & Veal (Million EUR)



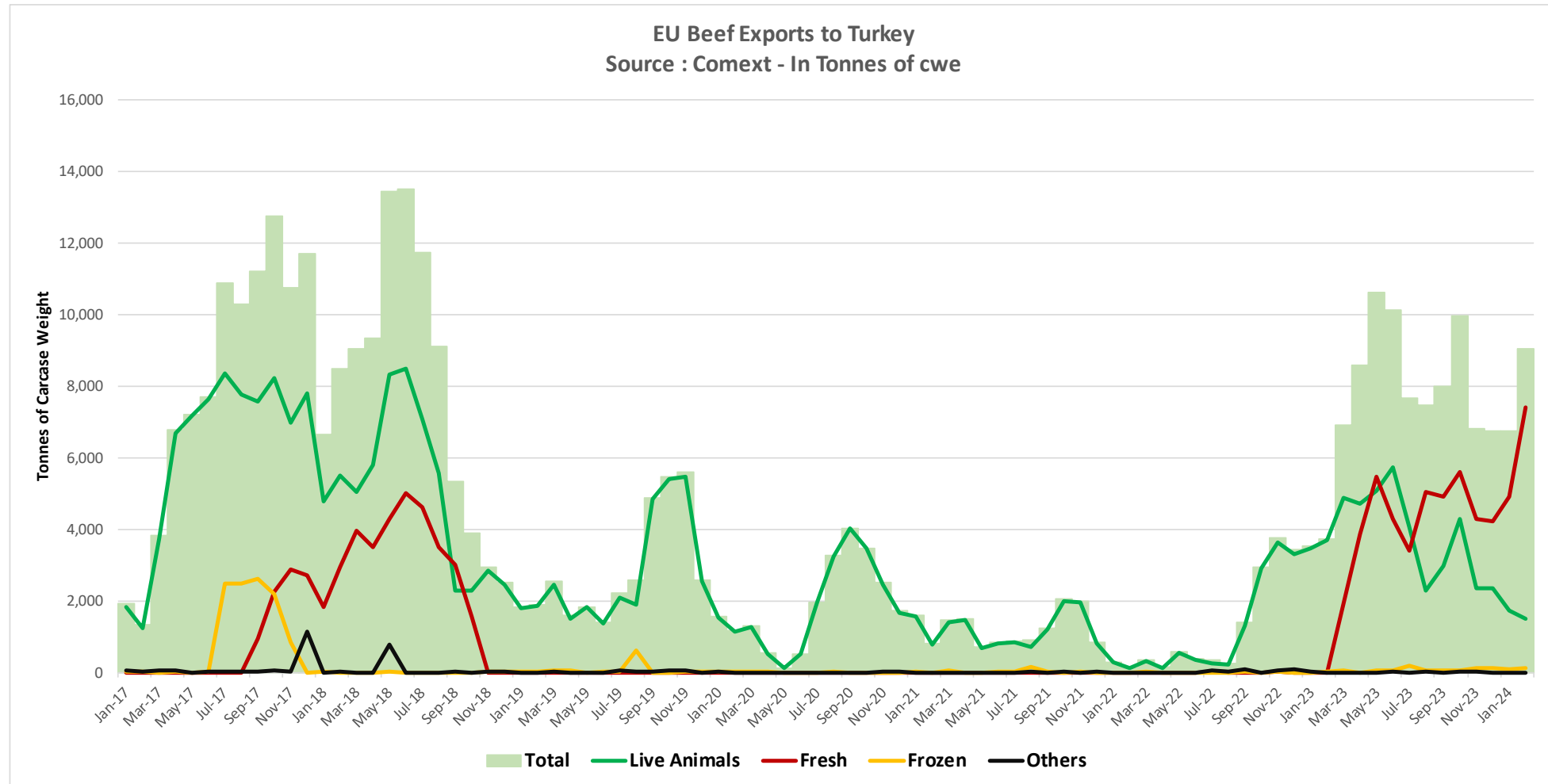
TRADE

EU EXPORTS Beef & Live Animals



TRADE

EU EXPORTS



23 May 2024

TRADE

EU Imports of Beef and Live Animals (Excl Fats):

EU IMPORTS Beef & Live Animals

In Tons of Carcase Weight

	2022		2023		Jan to Feb 2024		Compared to Jan to Feb 2023
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	118.767	33,0%	106.915	30,5%	17.412	30,4%	-1,8%
Brazil	86.512	24,0%	86.800	24,7%	13.115	22,9%	-10,0%
Argentina	62.584	17,4%	63.064	18,0%	10.943	19,1%	+4,9%
Uruguay	37.619	10,5%	41.565	11,8%	7.650	13,4%	+17,1%
USA	17.269	4,8%	18.281	5,2%	2.451	4,3%	-2,4%
Australia	8.385	2,3%	7.727	2,2%	1.173	2,0%	+5,6%
Namibia	5.168	1,4%	7.577	2,2%	1.021	1,8%	+13,5%
Paraguay	5.404	1,5%	4.768	1,4%	810	1,4%	+24,3%
Botswana	928	0,3%	1.610	0,5%	740	1,3%	+++
New Zealand	5.202	1,4%	4.518	1,3%	654	1,1%	+11,0%
Switzerland	4.730	1,3%	3.627	1,0%	652	1,1%	+9,7%
Other Destinations	7.417	2,1%	4.517	1,3%	621	1,1%	-15,3%
Extra-EU	359.985		350.968		57.243		+1,5%
% Change				-2,5%			

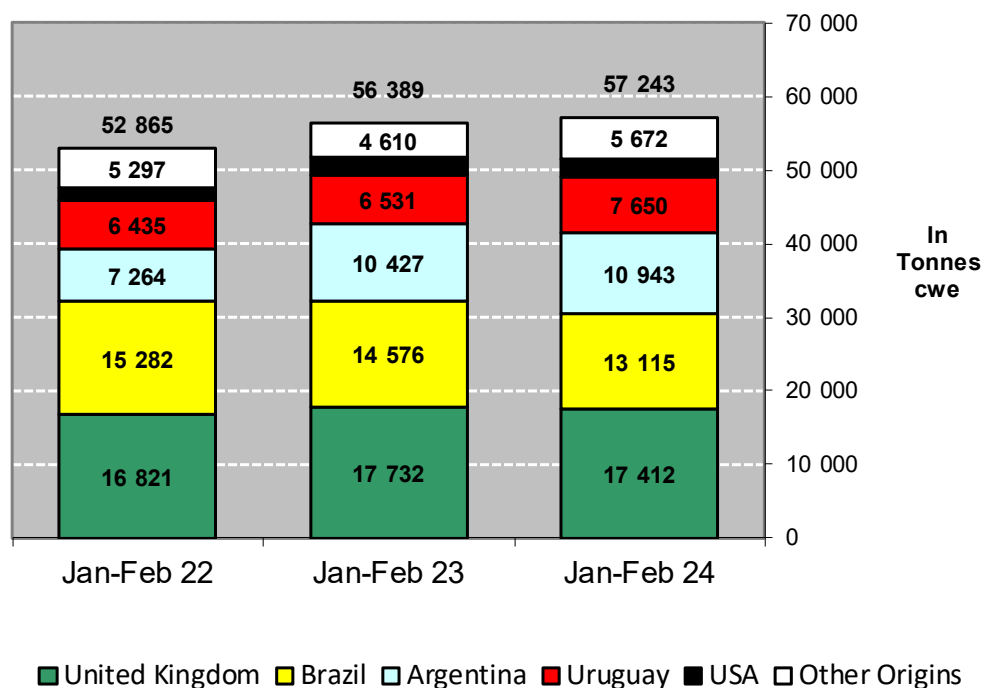
In Thousand Euros

	2022		2023		Jan to Feb 2024		Compared to Jan to Feb 2023
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	572.017	22,5%	549.283	22,7%	89.712	23,7%	+2,0%
Brazil	542.417	21,3%	487.137	20,1%	70.754	18,7%	-15,5%
Argentina	550.724	21,7%	511.887	21,2%	82.627	21,8%	+23,1%
Uruguay	321.251	12,6%	310.552	12,8%	51.803	13,7%	+9,2%
USA	214.746	8,4%	240.317	9,9%	32.733	8,7%	+3,1%
Australia	101.737	4,0%	90.673	3,7%	13.649	3,6%	-5,0%
Namibia	24.570	1,0%	40.343	1,7%	6.260	1,7%	+75,5%
Paraguay	35.579	1,4%	27.990	1,2%	3.796	1,0%	+21,6%
Botswana	3.405	0,1%	6.034	0,2%	2.568	0,7%	+++
New Zealand	50.277	2,0%	47.111	1,9%	6.671	1,8%	+18,5%
Switzerland	55.346	2,2%	41.517	1,7%	7.725	2,0%	+5,7%
Other Destinations	71.322	2,8%	66.730	2,8%	9.927	2,6%	+15,0%
Extra-EU	2.543.391		2.419.576		378.225		+4,9%
% Change				-4,9%			

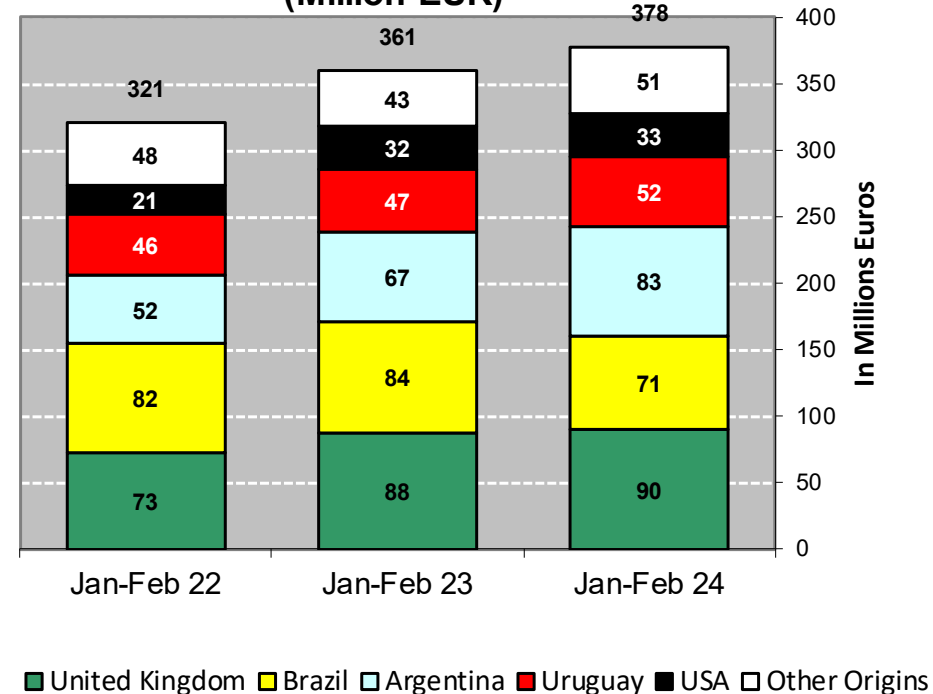
TRADE

EU IMPORTS Beef & Live Animals

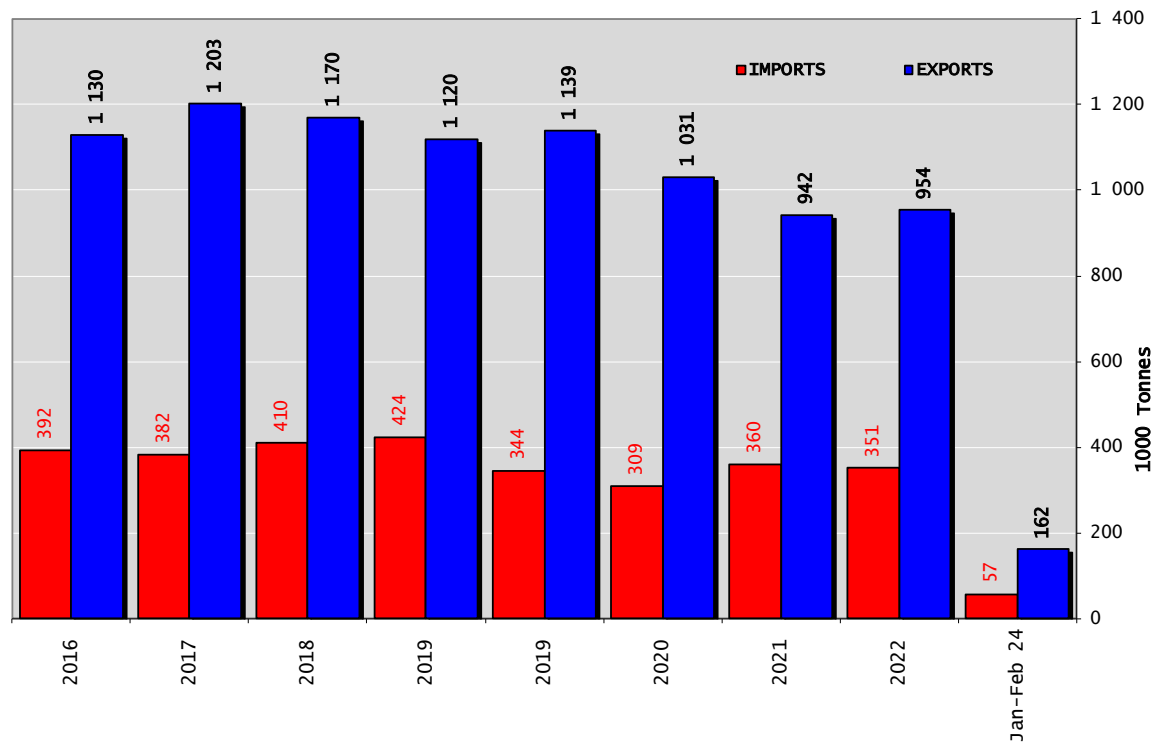
**IMPORTS of Beef & Veal into EU
(Tonnes cwe)**



**IMPORTS of Beef & Veal into EU
(Million EUR)**

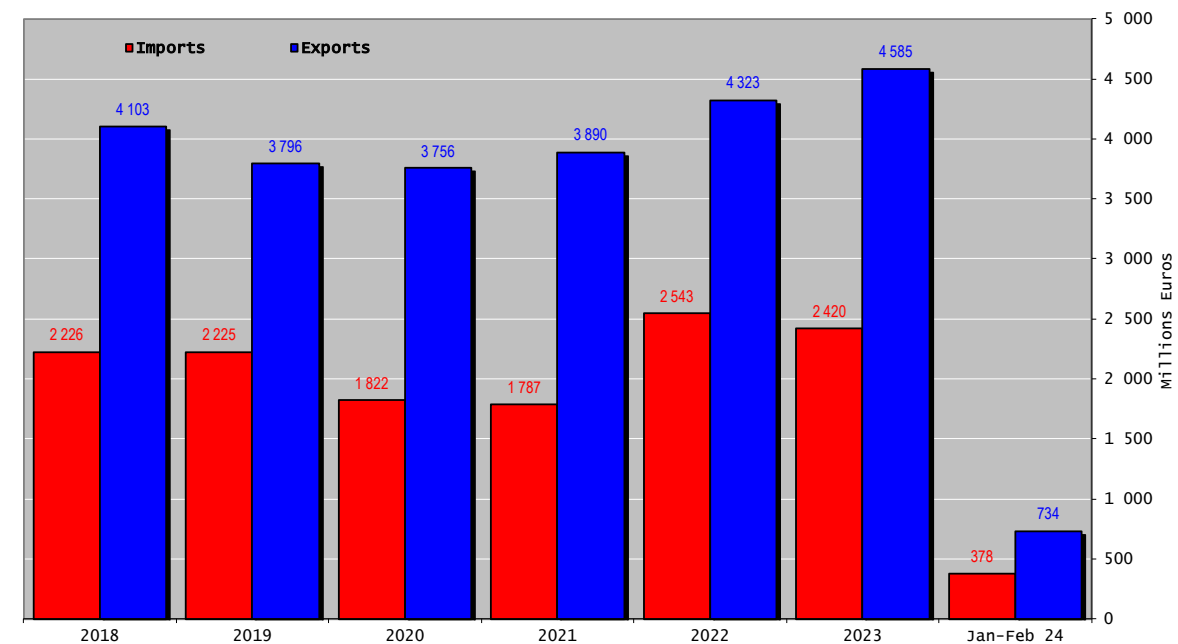


TRADE



EU TRADE BALANCE

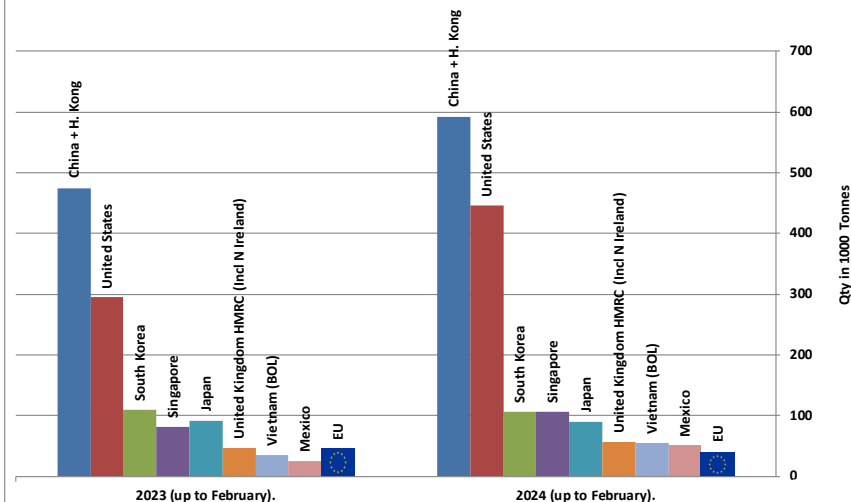
Beef & Live Animals



WORLD BEEF MARKET

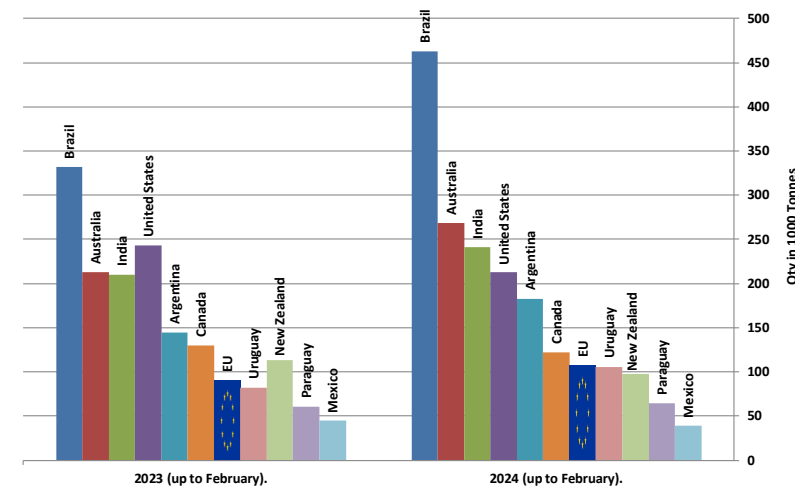
Main Importers of BEEF Products (up to February).

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

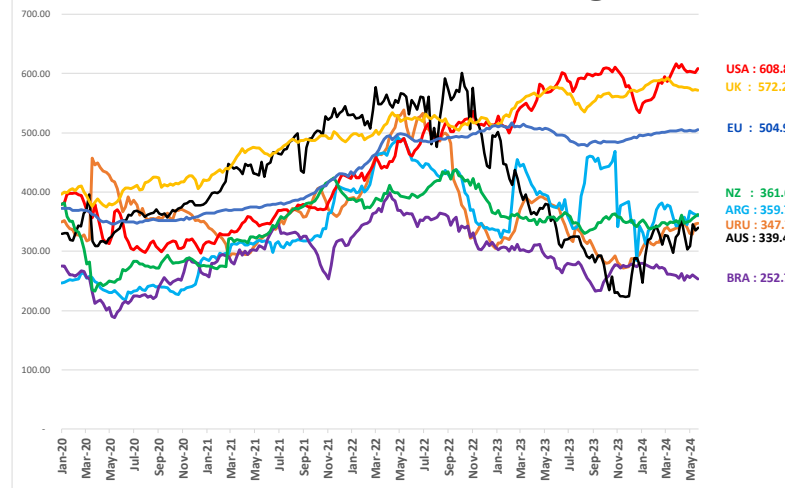


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World Beef Prices in Euros/100 kg carcase



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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