

# BEEF & VEAL MARKET SITUATION



European Meat market Observatory  
11 October 2019

# LIVESTOCK

# EU EVOLUTION

# TOTAL BOVINE

## JUNE SURVEY

May/Jun 1000 Hd	TOT LIVESTOCK					%Var 2019 2018	BOVINE < 1 Year					%Var 2019 2018	BOVINE 1-2 Year					%Var 2019 2018	BOVINE > 2 Year					%Var 2019 2018
	2016	2017	2018	2019			2016	2017	2018	2019			2016	2017	2018	2019			2016	2017	2018	2019		
BE	2 555	2 454	2 450	2 405	-1.8%		750	717	710	705	-0.7%		512	500	492	474	-3.7%		1 293	1 237	1 247	1 225	-1.7%	
BG																								
CZ																								
DK	1 583	1 565	1 560	1 512	-3.1%		547	527	538	510	-5.2%		307	311	294	292	-0.7%		730	727	729	710	-2.6%	
DE	12 563	12 366	12 093	11 763	-2.7%		3 805	3 723	3 618	3 502	-3.2%		2 983	2 948	2 848	2 788	-2.1%		5 775	5 694	5 627	5 473	-2.7%	
EE																								
IE	7 221	7 364	7 349	7 209	-1.9%		2 126	2 131	2 078	2 008	-3.4%		1 853	1 914	1 919	1 861	-3.0%		3 242	3 319	3 351	3 340	-0.3%	
EL																								
ES	6 451	6 588	6 725				2 413	2 480	2 504				896	927	990				3 141	3 181	3 230			
FR	19 559	19 433	18 737	18 470	-1.4%		5 638	5 542	5 125	5 227	+2.0%		3 561	3 523	3 417	3 229	-5.5%		10 362	10 367	10 195	10 014	-1.8%	
HR																								
IT	6 183	6 118	6 170	6 016	-2.5%		1 702	1 723	1 757	1 746	-0.6%		1 502	1 472	1 466	1 409	-3.9%		2 979	2 923	2 948	2 861	-2.9%	
CY																								
LV																								
LT																								
LU																								
HU																								
MT																								
NL	4 245	4 096	3 897	3 776	-3.1%		1 692	1 602	1 560	1 547	-0.9%		630	600	520	463	-10.9%		1 923	1 893	1 817	1 766	-2.8%	
AT	1 933	1 938	1 907	1 873	-1.8%		605	620	606	596	-1.6%		441	431	433	425	-1.9%		887	888	869	853	-1.8%	
PL	5 939	6 143	6 201	6 297	+1.5%		1 728	1 721	1 686	1 710	+1.4%		1 576	1 701	1 734	1 768	+2.0%		2 635	2 721	2 781	2 820	+1.4%	
PT	1 664	1 722	1 722				521	537	529				264	281	274				879	904	919			
RO	2 081	2 012	2 002	1 963	-2.0%		481	454	444	428	-3.6%		240	229	236	230	-2.5%		1 360	1 329	1 322	1 305	-1.4%	
SI																								
SK																								
FI																								
SE	1 489	1 501	1 507	1 466	-2.7%		475	472	475	451	-5.1%		375	385	381	380	-0.2%		639	644	651	636	-2.4%	
UK	10 033	10 004	9 891	9 756	-1.4%		2 989	2 940	2 908	2 863	-1.5%		2 474	2 516	2 479	2 458	-0.8%		4 569	4 548	4 504	4 435	-1.5%	
EU	83 499	83 305	82 211	72 506	-1.7%		25 473	25 190	24 539	21 294	-1.0%		17 613	17 740	17 482	15 777	-2.7%		40 414	40 375	40 191	35 437	-1.7%	

Source : EStat New cronos

EU %Var is calculated considering only countries available in 2018 AND 2019

# LIVESTOCK

# EU EVOLUTION TOTAL BOVINE

## JUNE SURVEY

May/Jun 1000 Hd	TOTAL COWS					%Var 2019 2018	DAIRY COWS					%Var 2019 2018	OTHER COWS					%Var 2019 2018
	2016	2017	2018	2019		2016	2017	2018	2019		2016	2017	2018	2019				
BE	1 005	970	968	960	-0.8%	536	521	532	536	+0.6%	469	449	435	424	-2.6%			
BG																		
CZ																		
DK	669	665	667	654	-1.9%	572	570	575	567	-1.4%	97	95	91	87	-4.4%			
DE	4 957	4 885	4 830	4 720	-2.3%	4 272	4 214	4 167	4 067	-2.4%	685	670	663	653	-1.6%			
EE																		
IE	2 502	2 514	2 529	2 505	-1.0%	1 398	1 433	1 481	1 505	+1.6%	1 104	1 081	1 048	1 000	-4.6%			
EL																		
ES	2 801	2 832	2 865			827	825	825			1 973	2 007	2 040					
FR	7 838	7 811	7 652	7 546	-1.4%	3 576	3 552	3 512	3 471	-1.2%	4 263	4 259	4 141	4 075	-1.6%			
HR																		
IT	2 245	2 187	2 192	2 110	-3.8%	1 948	1 907	1 904	1 840	-3.4%	297	280	288	270	-6.3%			
CY																		
LV																		
LT																		
LU																		
HU																		
MT																		
NL	1 811	1 753	1 685	1 651	-2.0%	1 743	1 694	1 622	1 589	-2.1%	68	59	63	63	-0.6%			
AT	755	755	740	726	-1.9%	536	540	538	525	-2.4%	218	215	202	201	-0.8%			
PL	2 332	2 374	2 429	2 461	+1.3%	2 146	2 154	2 233	2 221	-0.5%	186	220	196	240	+22.4%			
PT	736	747	745			246	244	244			490	504	501					
RO	1 228	1 199	1 197	1 179	-1.5%	1 216	1 184	1 184	1 162	-1.9%	12	15	12	17	+34.7%			
SI																		
SK																		
FI																		
SE	524	530	534	516	-3.4%	331	322	319	303	-5.2%	194	208	214	213	-0.7%			
UK	3 493	3 481	3 441	3 404	-1.1%	1 897	1 891	1 883	1 869	-0.7%	1 596	1 589	1 558	1 536	-1.4%			
EU	32 895	32 702	32 475	28 430	-1.5%	21 243	21 050	21 020	19 654	-1.5%	11 652	11 651	11 454	8 777	-1.5%			

Source : EStat New cronos

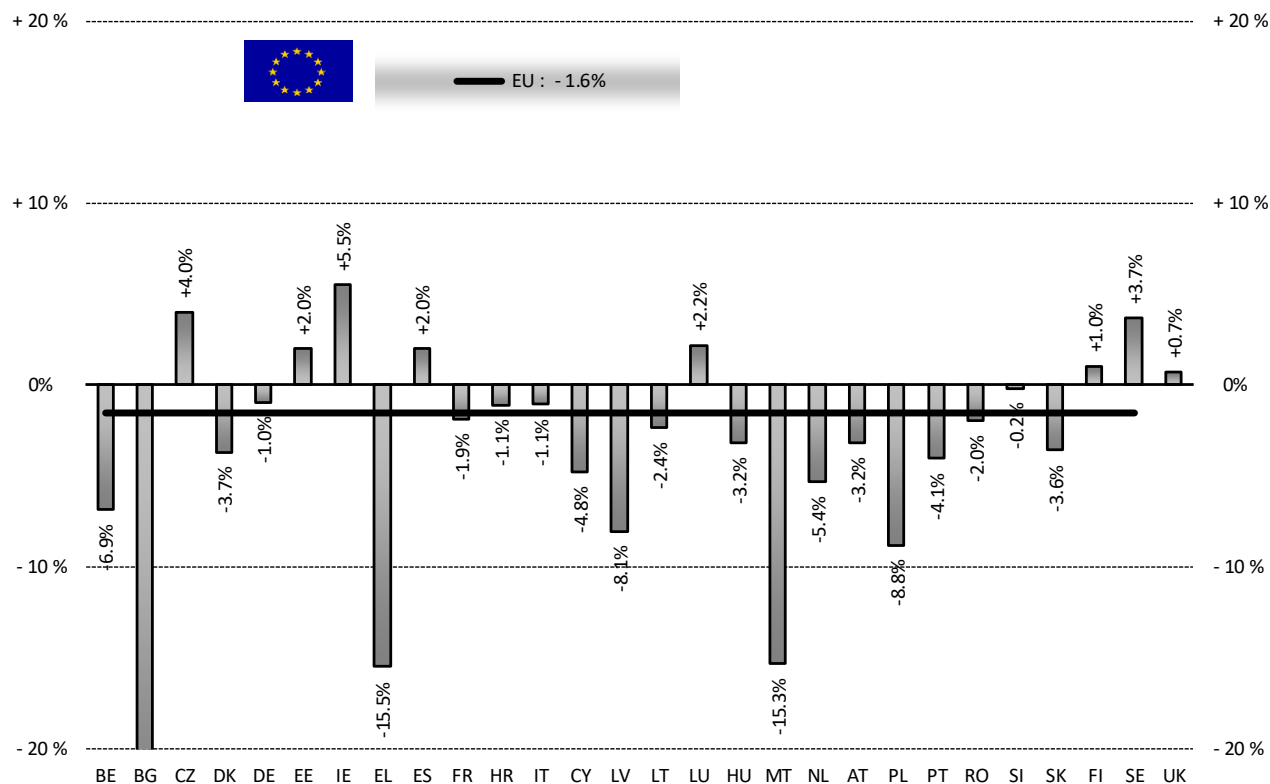
EU %Var is calculated considering only countries available in 2018 AND 2019

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# PRODUCTION

# % EVOLUTION HEADS

HEADS	Jan-Jun 19/18	
	EU15	EU28
Bull	+0.5%	-1.0%
Bullock	-1.9%	-1.8%
Cow	-5.0%	-5.4%
Heifer	+3.6%	+3.1%
Calve	+1.2%	+0.8%
Young cattle	-5.4%	-5.3%
Meat of bovine animals	-1.0%	-1.6%



Estimates for last month of period :

Source : EStat - Newcronos

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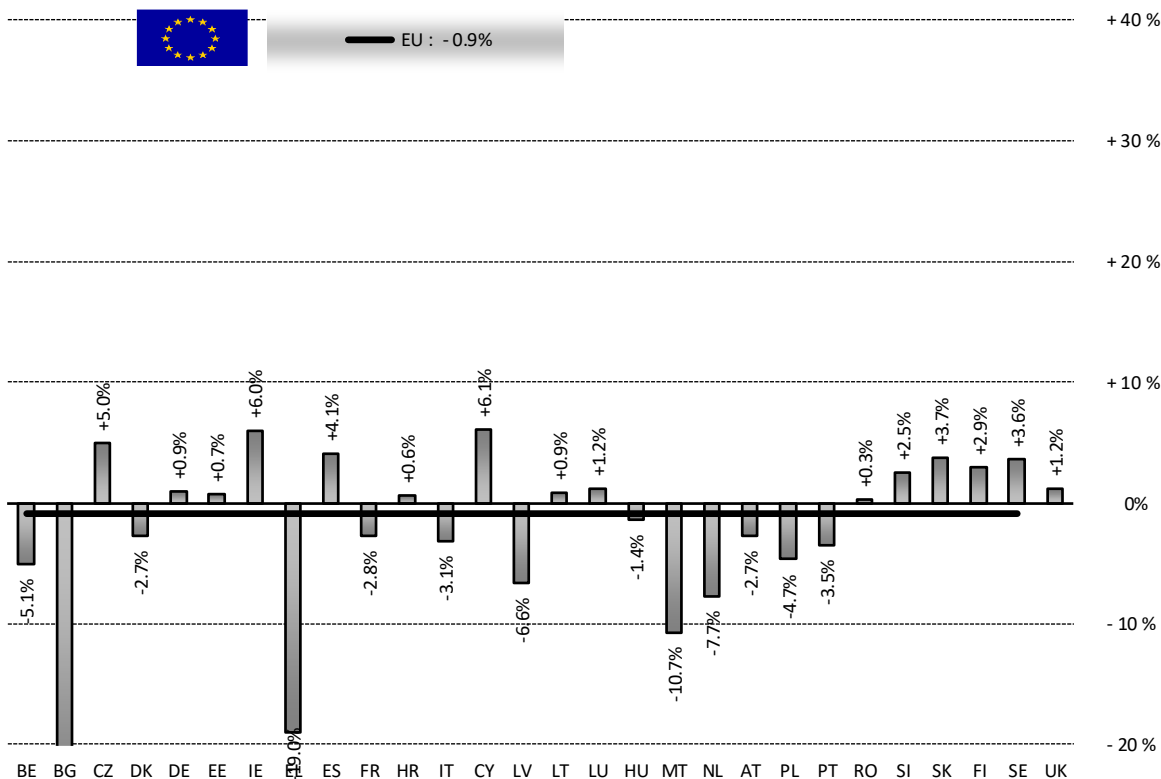
# PRODUCTION

# % EVOLUTION TONNES

TONNES	Jan-Jun 19/18	
	EU15	EU28
Bull	+0.9%	+0.1%
Bullock	-1.1%	-0.5%
Cow	-3.6%	-3.9%
Heifer	+2.9%	+2.8%
Calve	+0.6%	+0.5%
Young cattle	-5.6%	-5.3%
Meat of bovine animals	-0.6%	-0.9%



EU : -0.9%



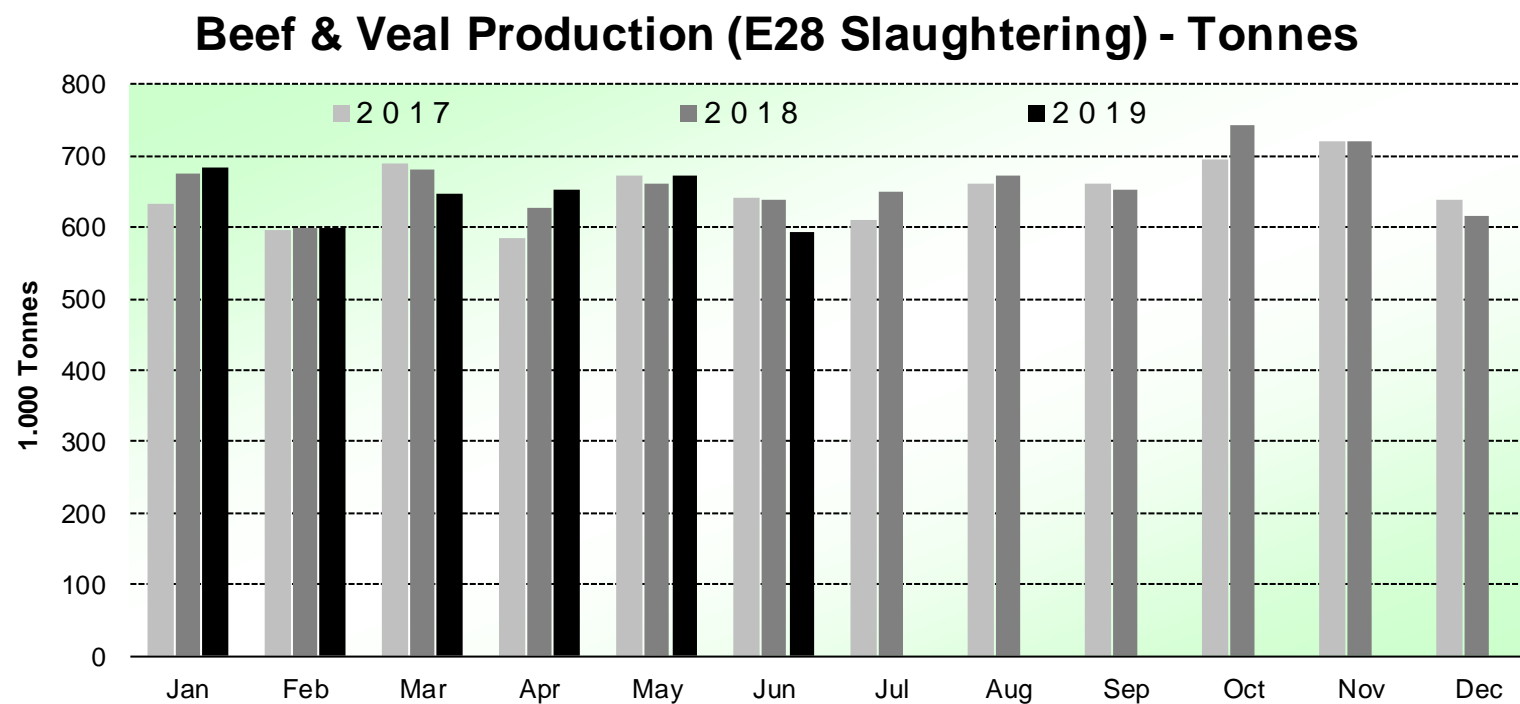
Estimates for last month of period :

Source : EStat - Newcronos

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# PRODUCTION

HISTORIC  
TONNES



Source: EStat-Newcronos

# PRICES CARCASSES

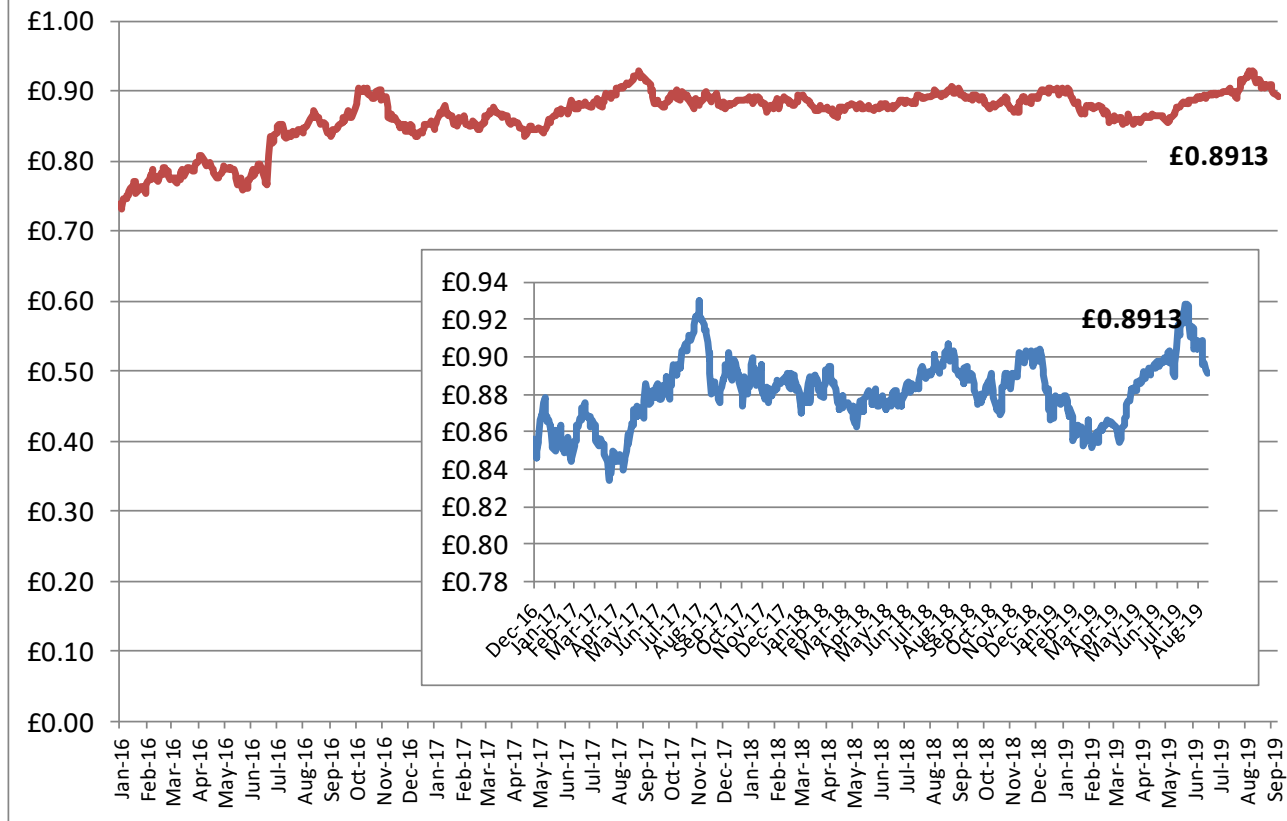
## Dashboard

EU Prices week		36	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	354.1	€/100 kg	- 0.3%	+ 0.8%	- 4.6%
	Young Bovines (Z)	356.1		- 0.5%	- 1.0%	- 0.5%
	Young Bulls (A)	356.7		- 0.4%	+ 1.1%	- 3.3%
	Steers (C)	359.3		- 0.1%	+ 0.8%	- 10.1%
	Cows (D)	285.4		- 0.3%	+ 0.3%	- 2.0%
	Heifers (E)	364.9		- 0.3%	+ 0.2%	- 5.1%
Live Animals	Male Calves Dairy Type	73.25	€/head	- 5.7%	- 32.8%	- 25.6%
	Male Calves Beef Type	187.1		- 3.4%	- 16.8%	- 3.4%
	Young Store Cattle	2.24	€/kg	- 1.2%	- 6.4%	- 3.6%
	Yearling Male Store Cattle	2.17		- 1.0%	- 3.7%	- 4.2%
	Yearling Female Store Cattle	2.25		- 1.1%	- 2.2%	- 1.6%
	Calves slaughtered <8M	467.1	€/100	+ 2.7%	- 1.2%	- 4.9%

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

## EXCHANGE RATE INDEX / Euro

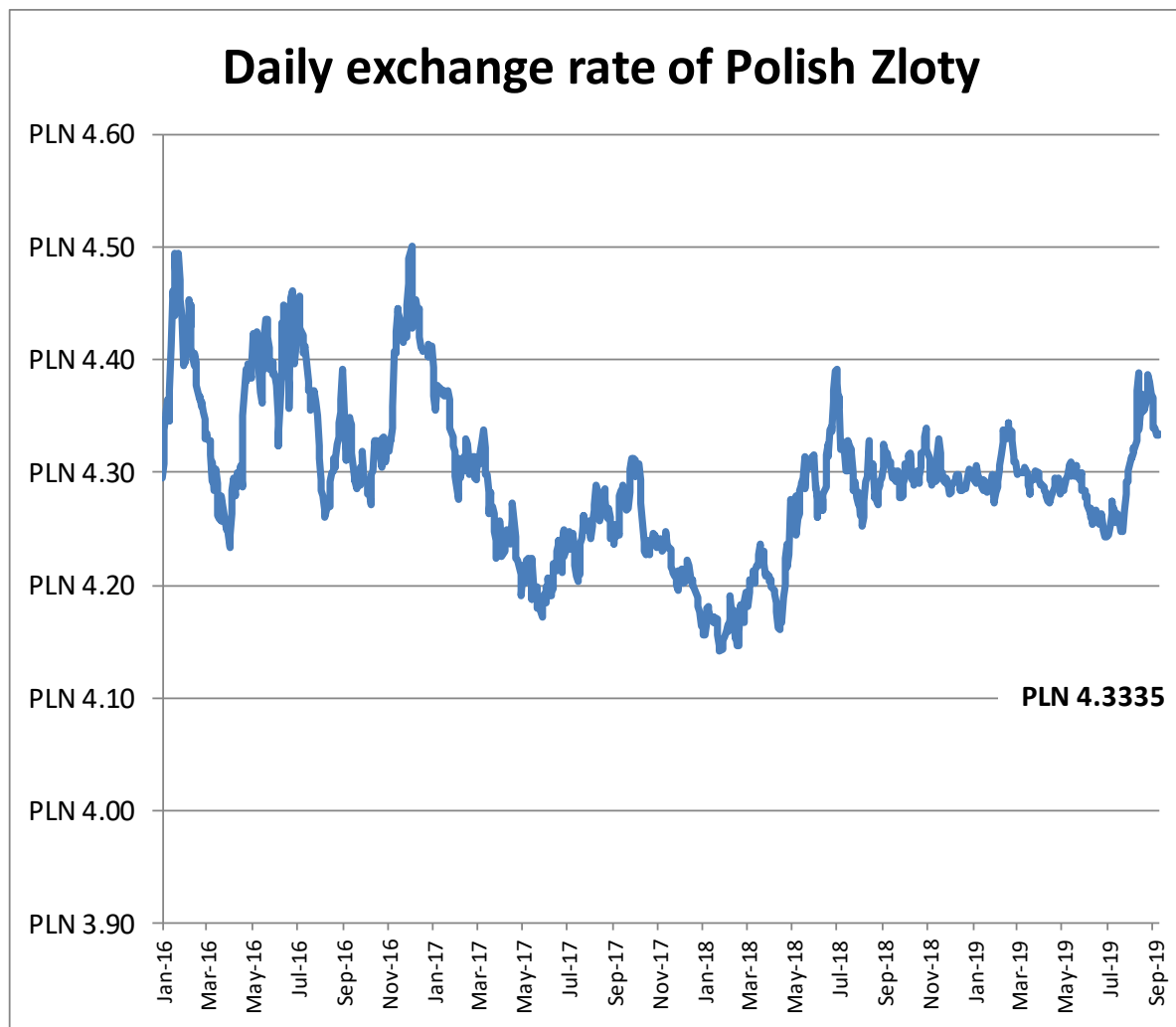
### Daily exchange rate of Pound Sterling compared to the Euro



Source : ECB



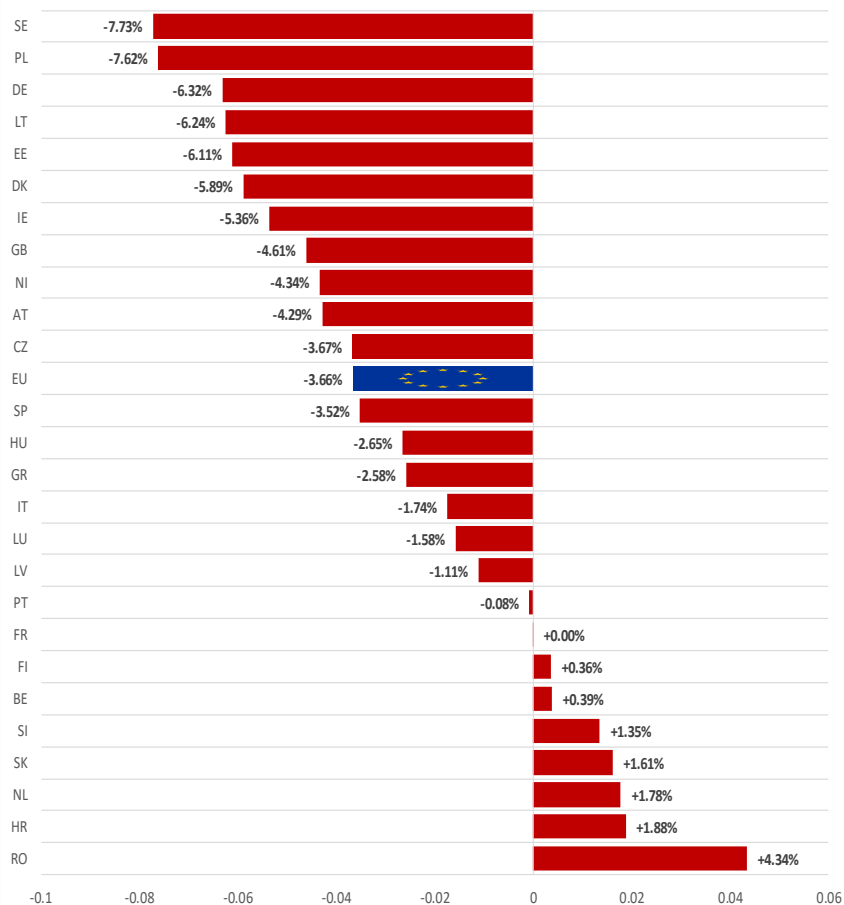
## EXCHANGE RATE INDEX / Euro



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# PRICES CARCASSES

EU ACZ R3 Price Comparison between average monthly price September 2018 - August 2019 compared to September 2017 - August 2018

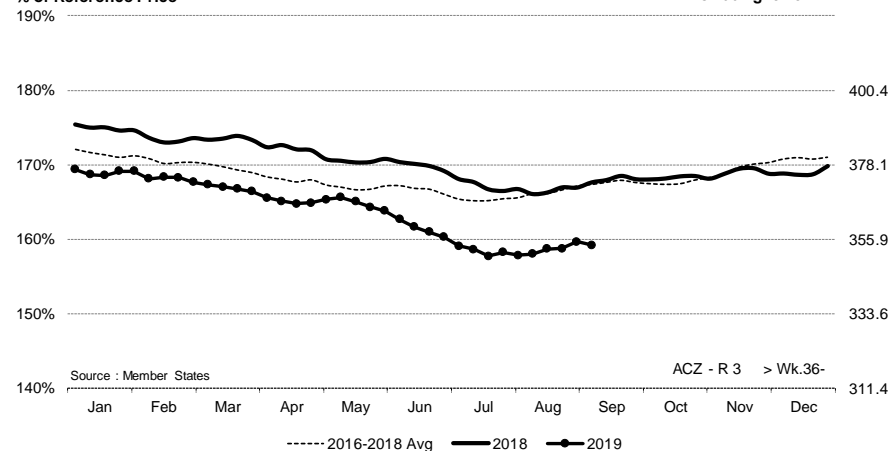


# EU EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.36-2019

% of Reference Price

€/100 kg cwe



Price in week 36 : **354.16**

% change y/y : **- 5.0%**

% Ref. Price in wk 36 : **159.2%**

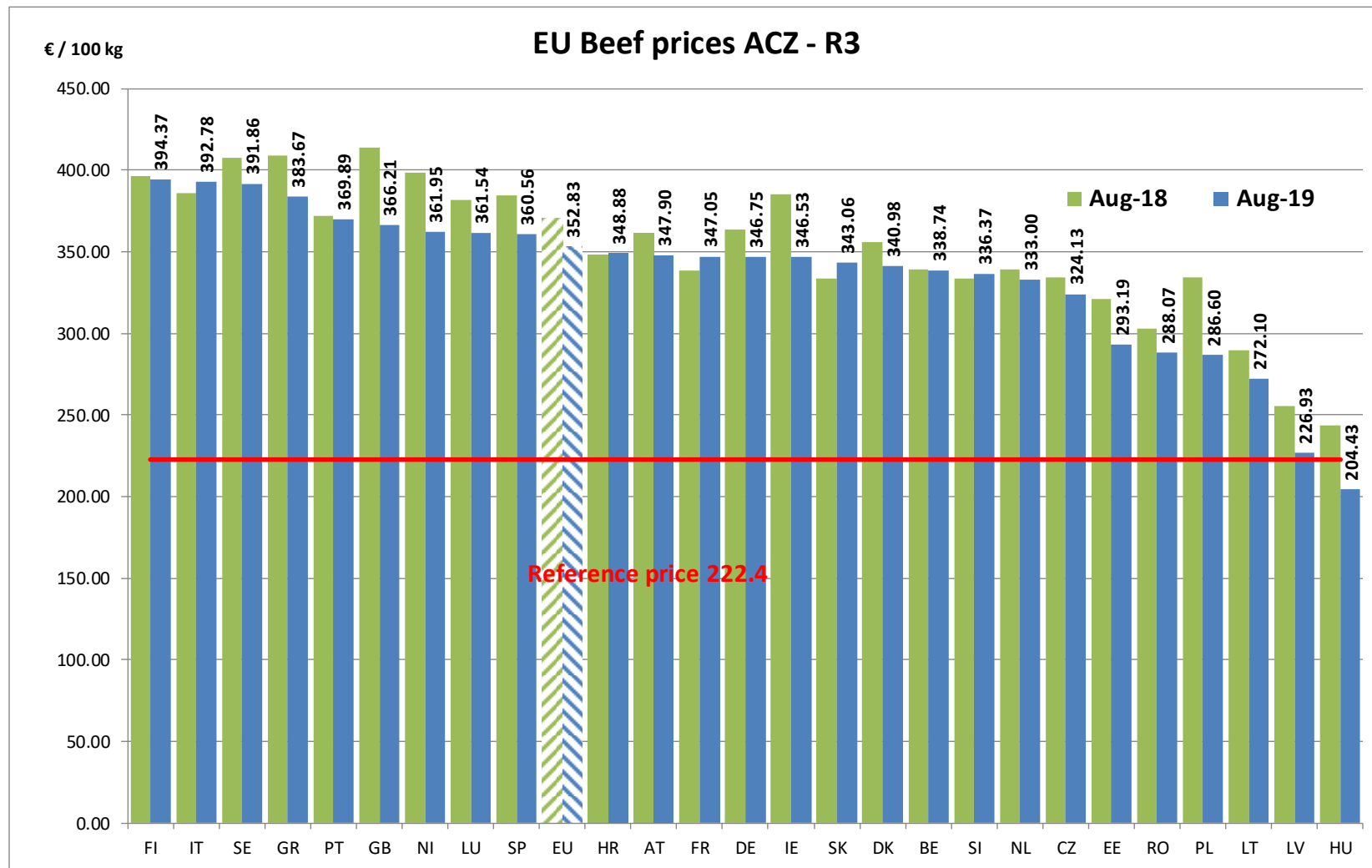
Average price in August 2019 : **352.83**

% change y/y : **- 4.7%**

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# PRICES CARCASSES

EU EVOLUTION  
A/C/Z.R3

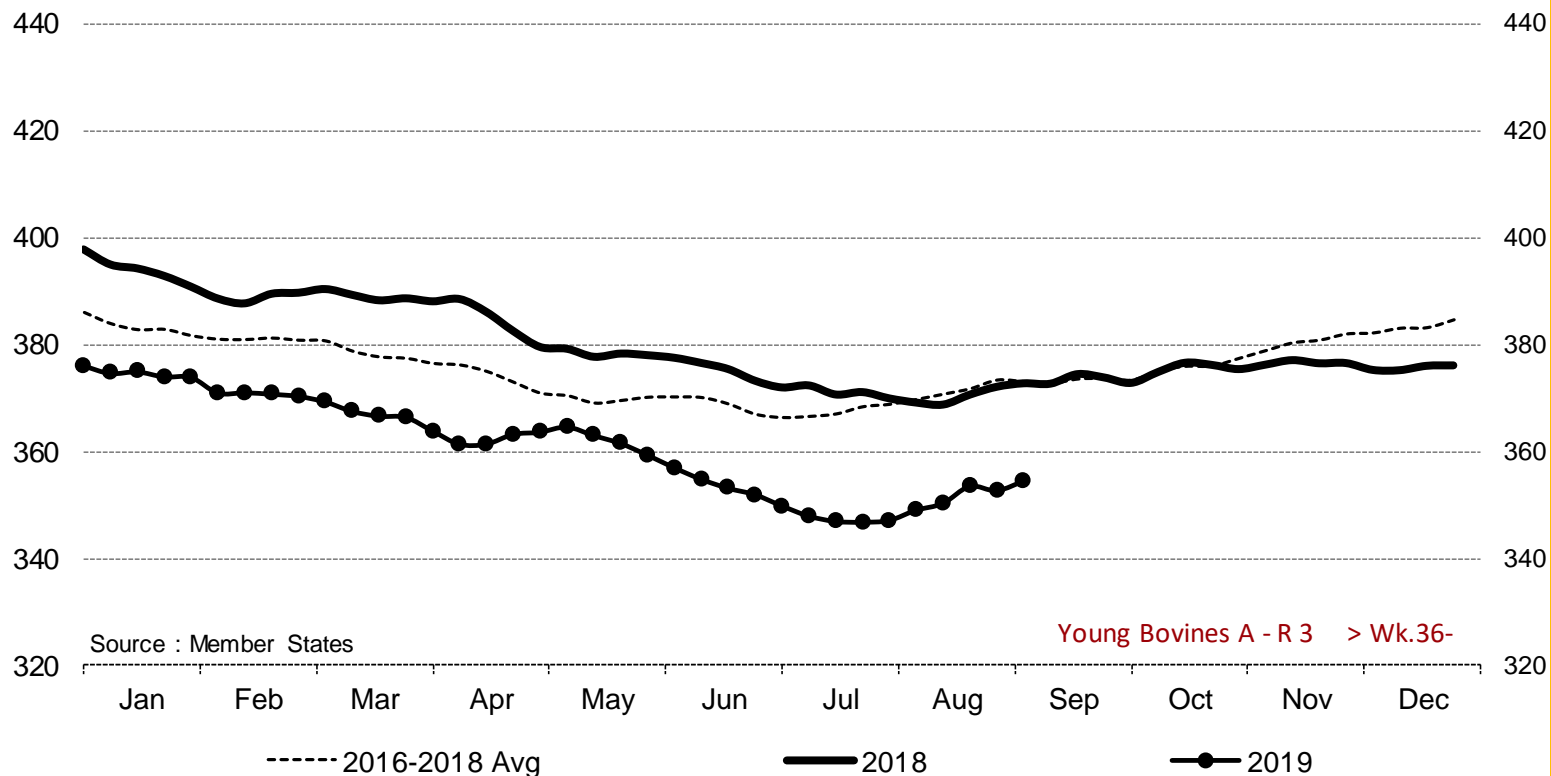


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# PRICES CARCASSES

# EU EVOLUTION YOUNG BULL - A.R3

Young Bovines A - R 3 > Wk.36-2019



Price in week 36 : **354.51**  
% change y/y : **- 4.9%**

Average price in August 2019 : **350.80**  
% change y/y : **- 5.2%**

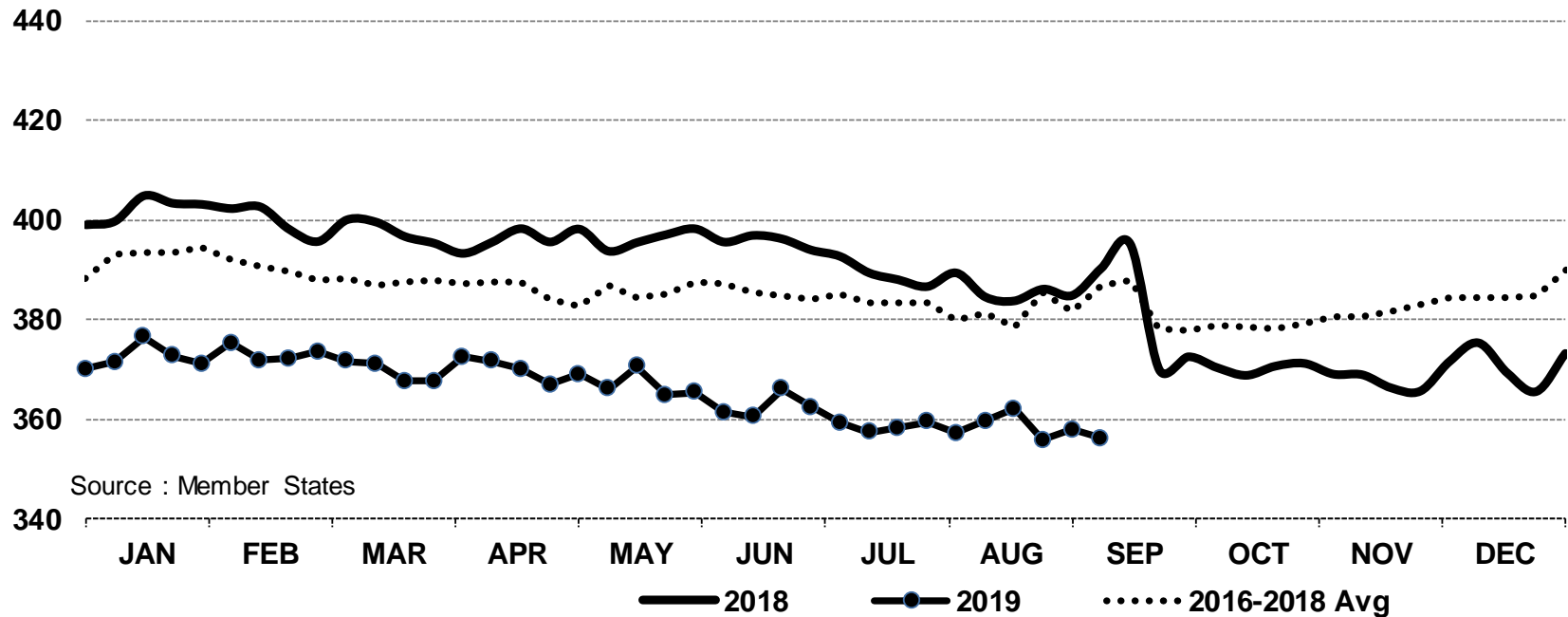
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# PRICES CARCASSES

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

In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.36-2019



Price in week 36 : **356.18**

08/08/2019

Average price in August 2019 : **358.70**

% change y/y : **- 8.7%**

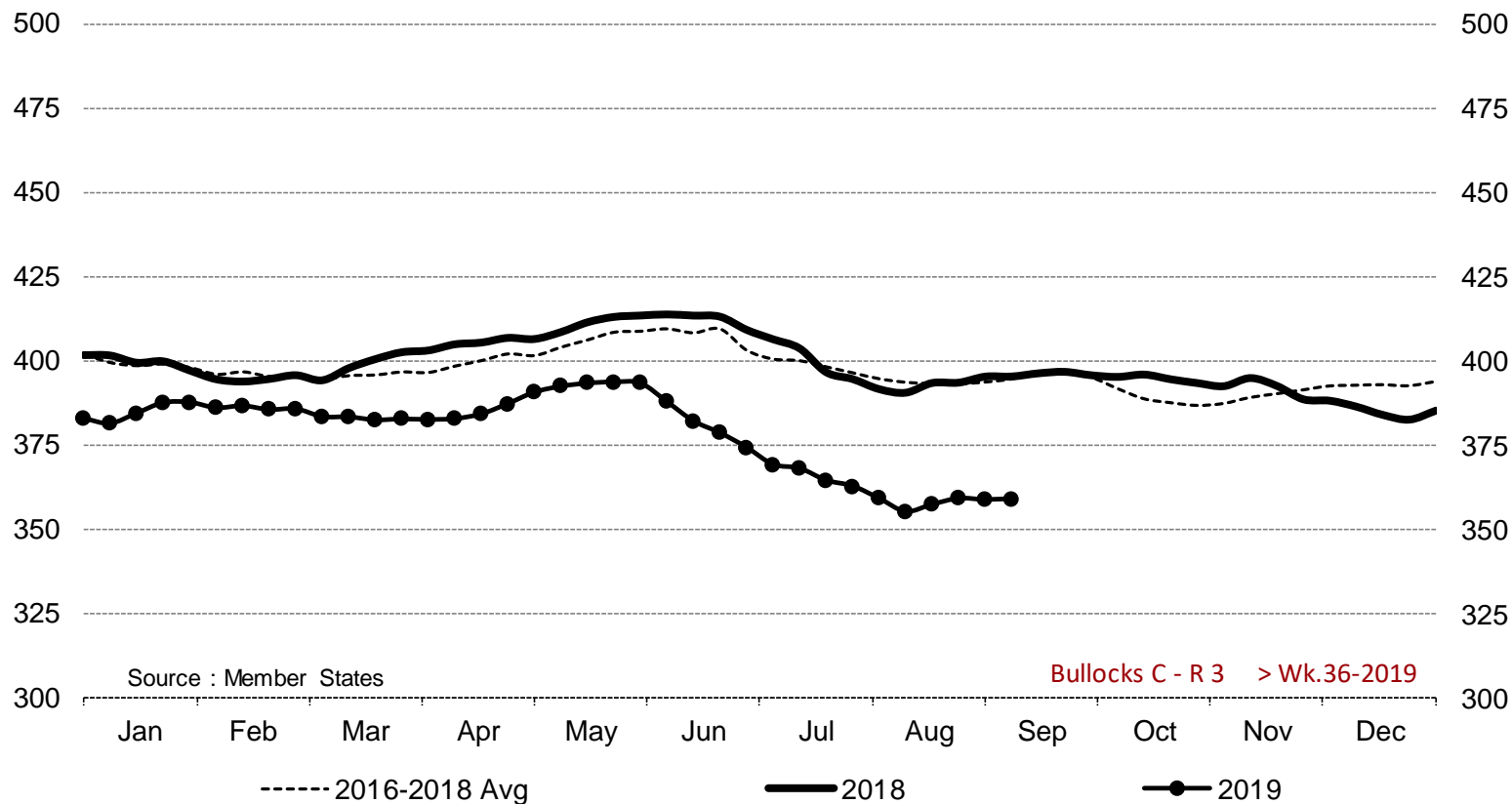
% change y/y : **- 7.0%**

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# PRICES CARCASSES

# E.U. EVOLUTION STEER - C.R3

Bullocks C - R 3 > Wk.36-2019



Price in week 36 : **358.88**  
% change y/y : **- 9.2%**

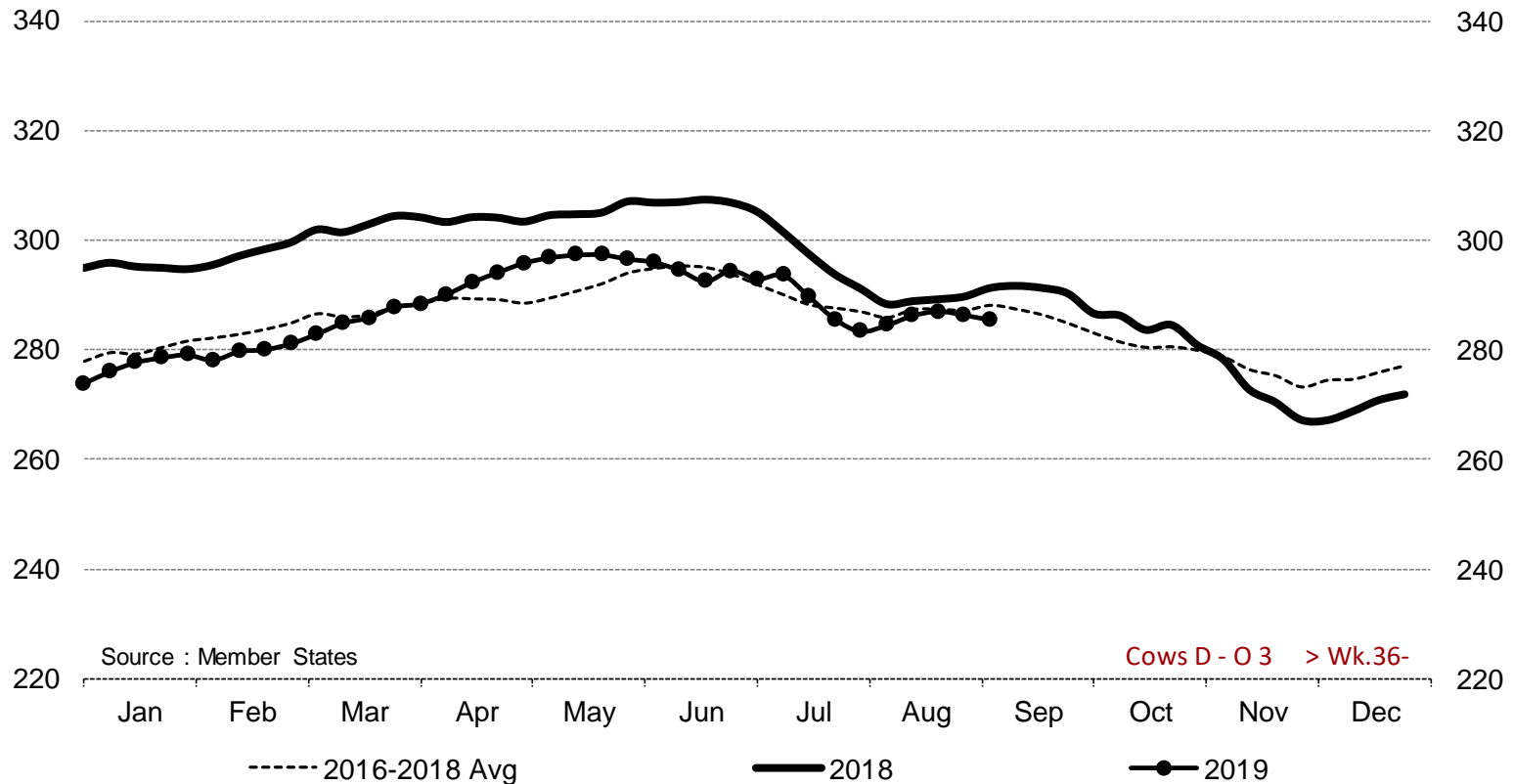
Average price in August 2019 : **357.58**  
% change y/y : **- 9.0%**

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# PRICES CARCASSES

# E.U. EVOLUTION COW - D.O3

Cows D - O 3 > Wk.36-2019



Price in week 36 : **285.42**  
% change y/y : **- 2.0%**

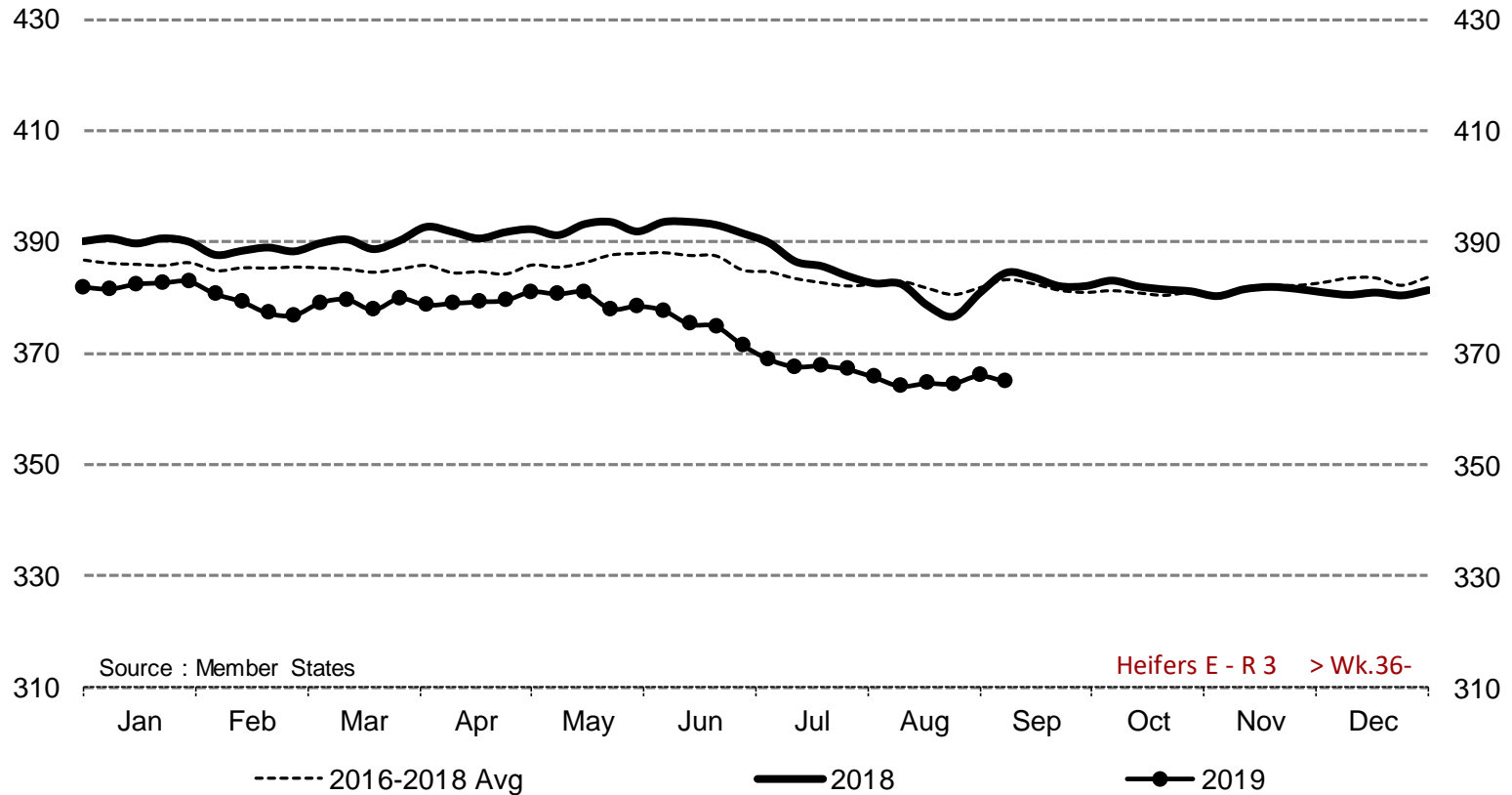
Average price in August 2019 : **285.66**  
% change y/y : **- 1.3%**

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# PRICES CARCASSES

# EU EVOLUTION HEIFER - E.R3

Heifers E - R 3 > Wk.36-2019



Price in week 36 : **364.92**  
% change y/y : **- 5.1%**

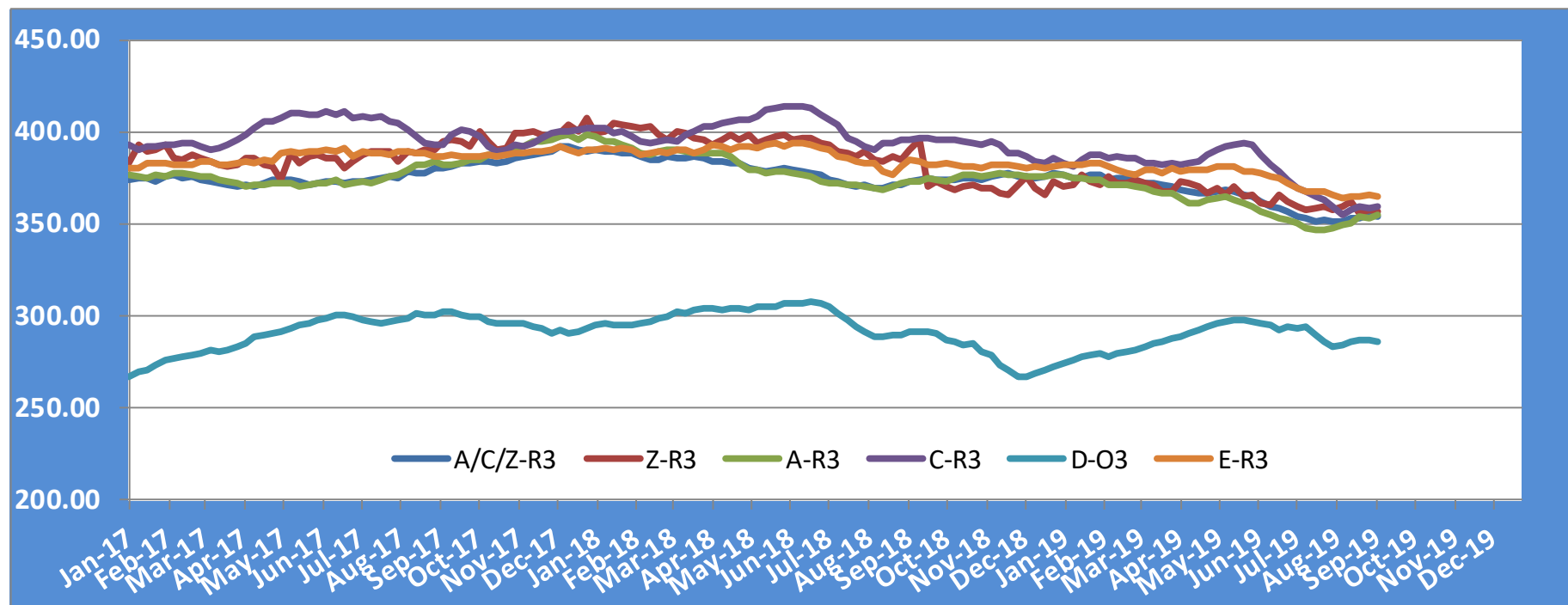
Average price in August 2019 : **364.92**  
% change y/y : **- 4.0%**

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# PRICES CARCASSES

## EU EVOLUTION All CAT GLOBAL VIEW

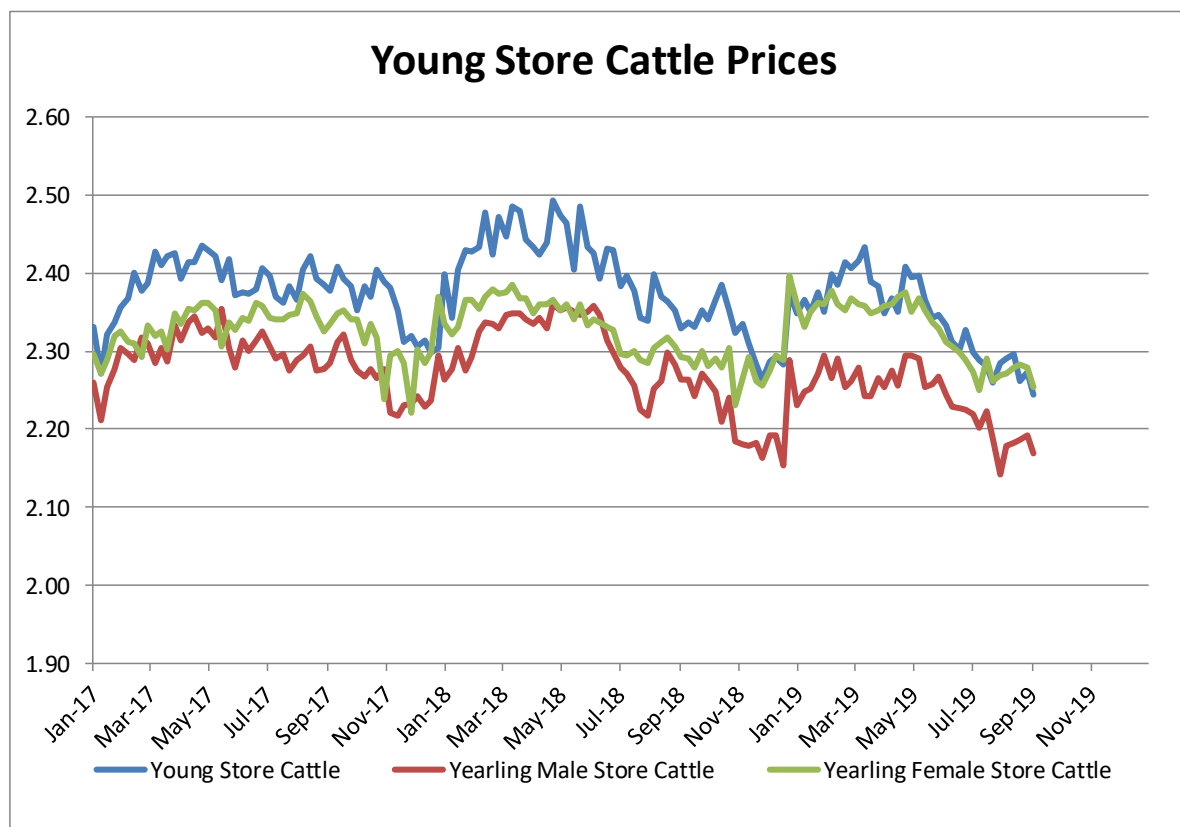


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# PRICES LIVE BOVINES

# EU EVOLUTION STORE CATTLE

Store cattle (€/100 kg live weight)

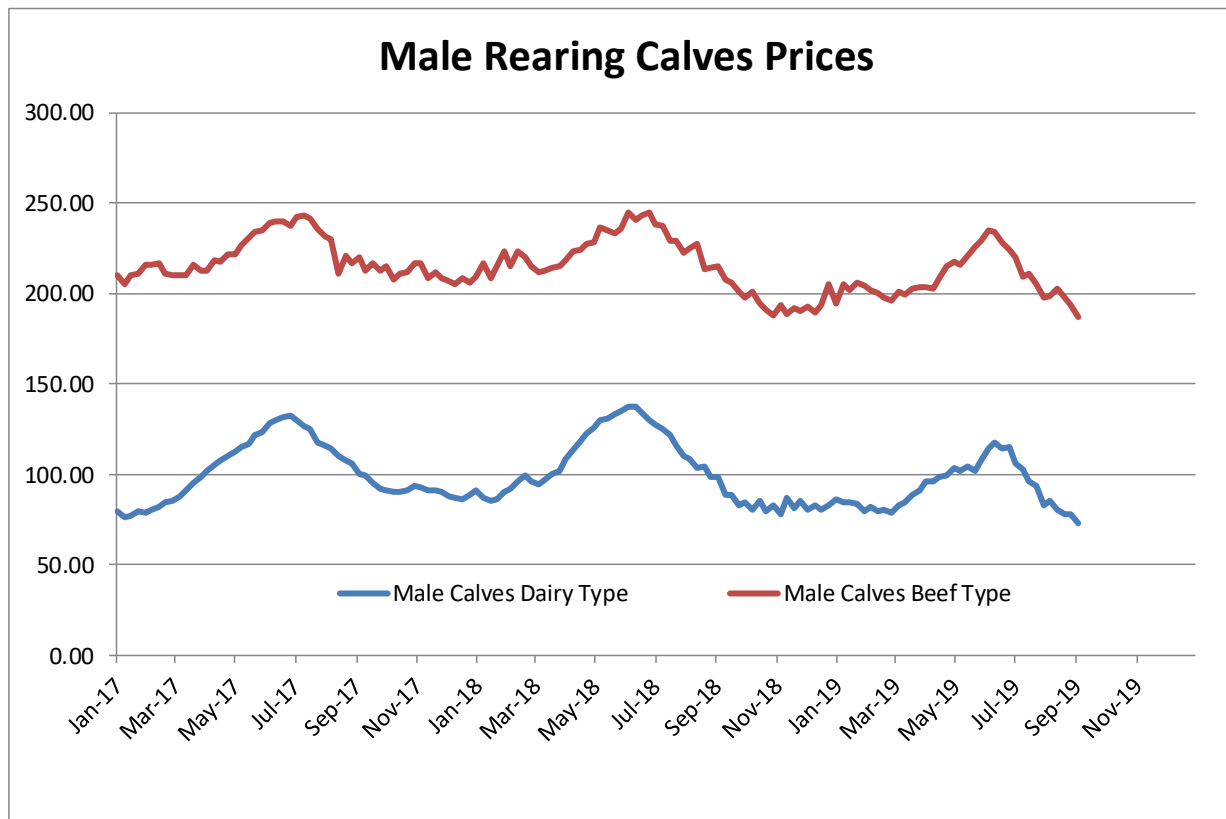


Young Store Cattle Price in	Week 36	2.24	Yearling Male Store Cattle Price	2.17
	Change y/y	-3.59%	Change y/y	-4.15%
Yearling Female Store Cattle Price		2.25		
	Change y/y	-1.64%		

# 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 36 187.18  
Change y/y -12.89%

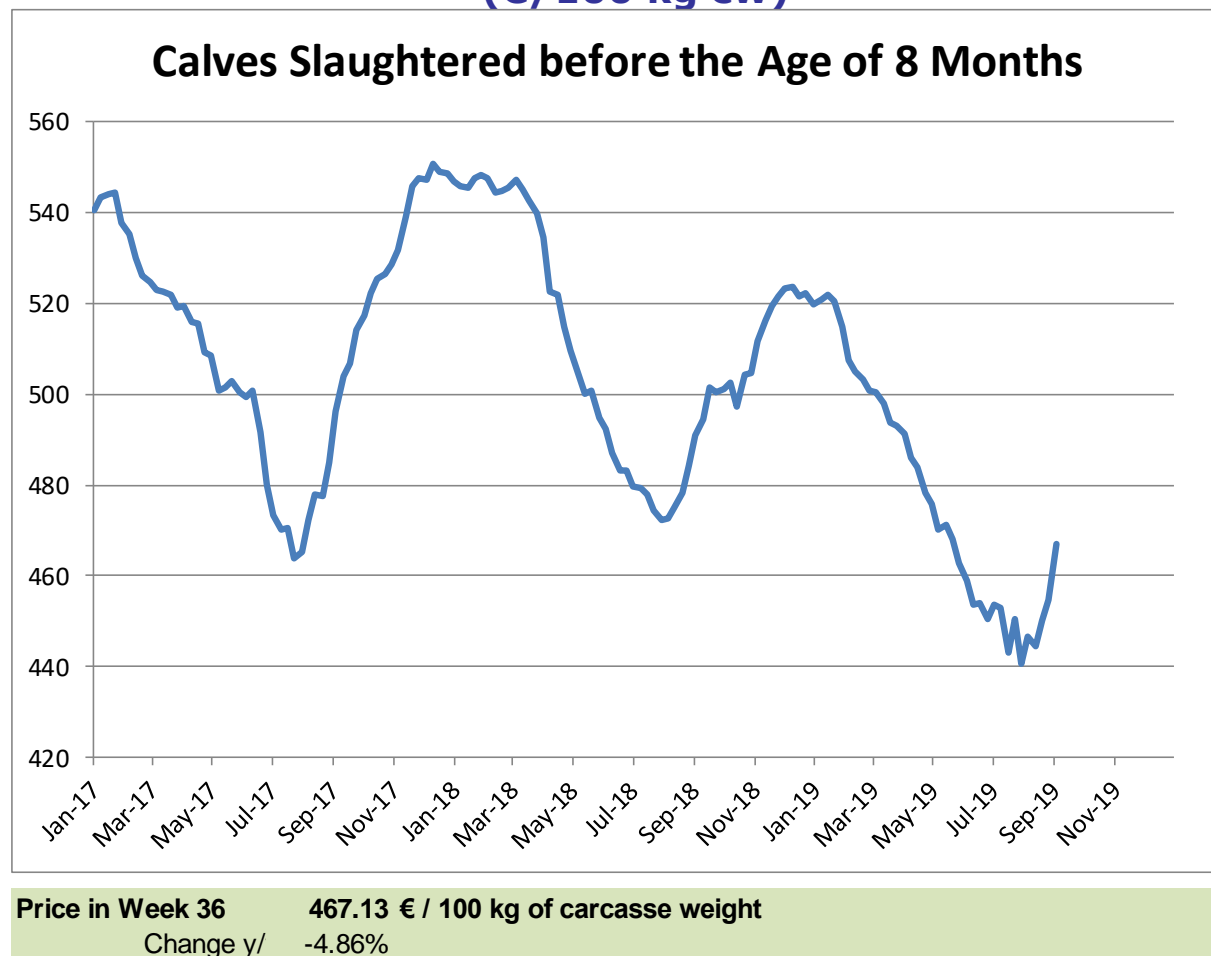
**Male Rearing Calves Dairy type**

Price in Week 36 73.25  
Change y/y -25.59%

# PRICES LIVE BOVINES

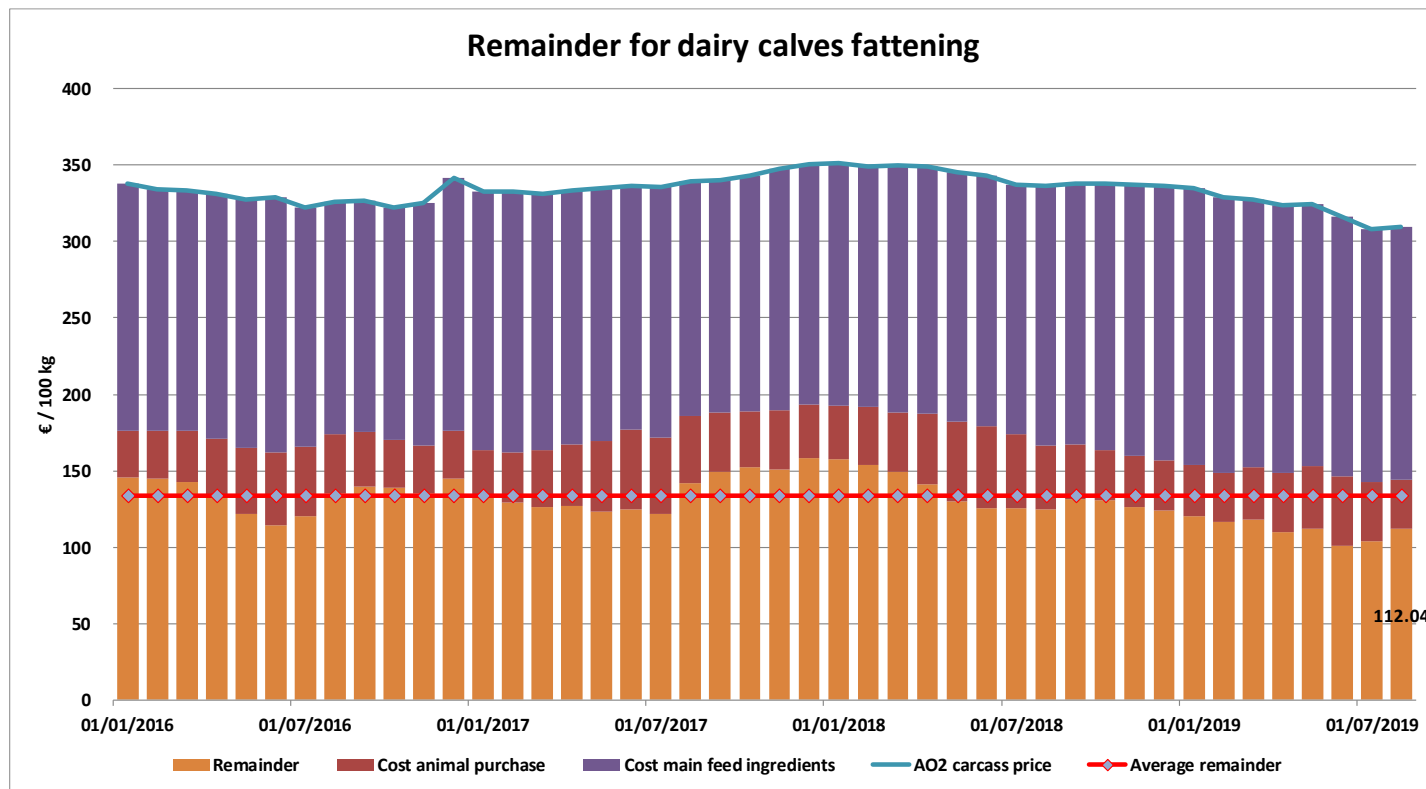
## EU EVOLUTION Butcher Calves

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



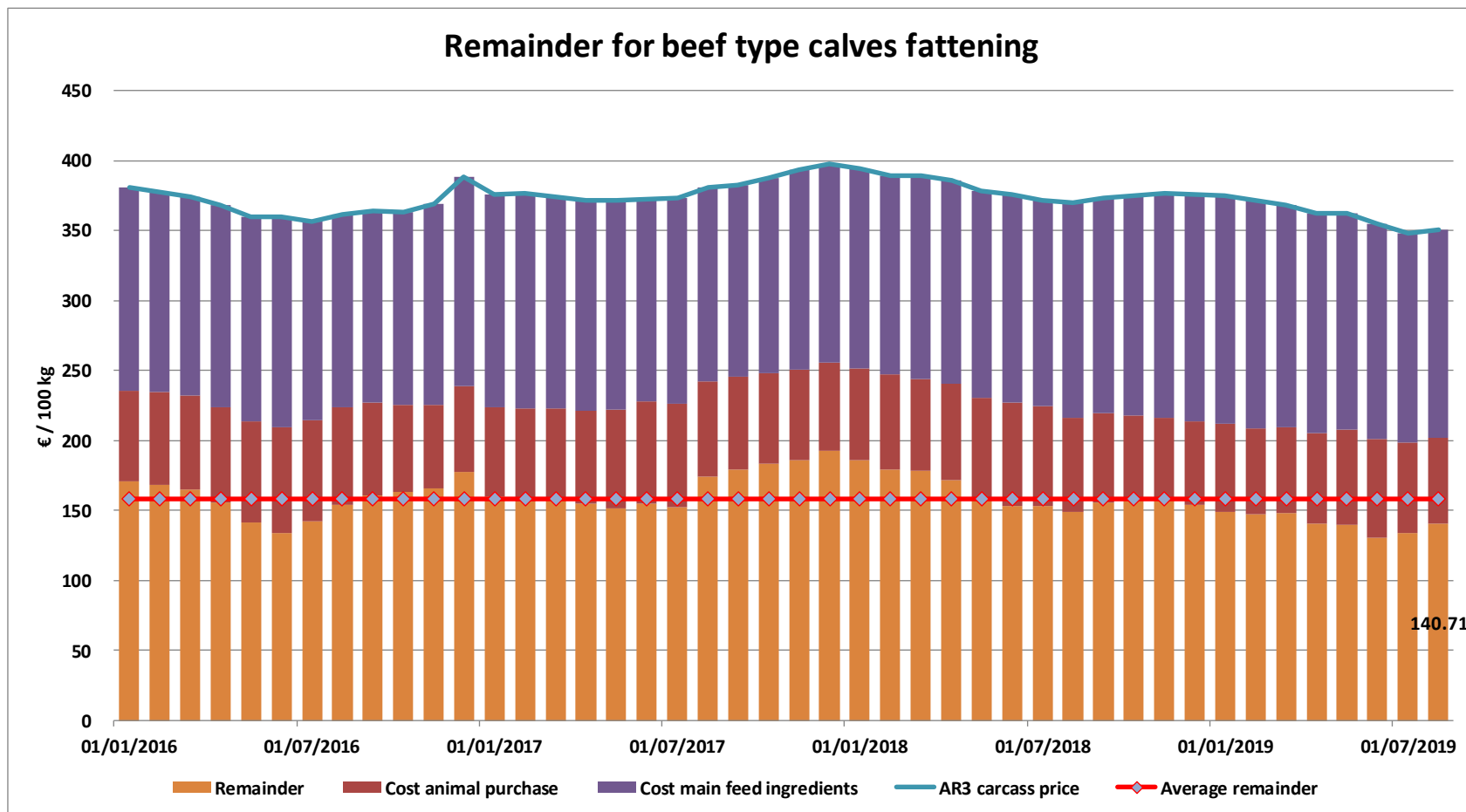
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# REMAINDERS



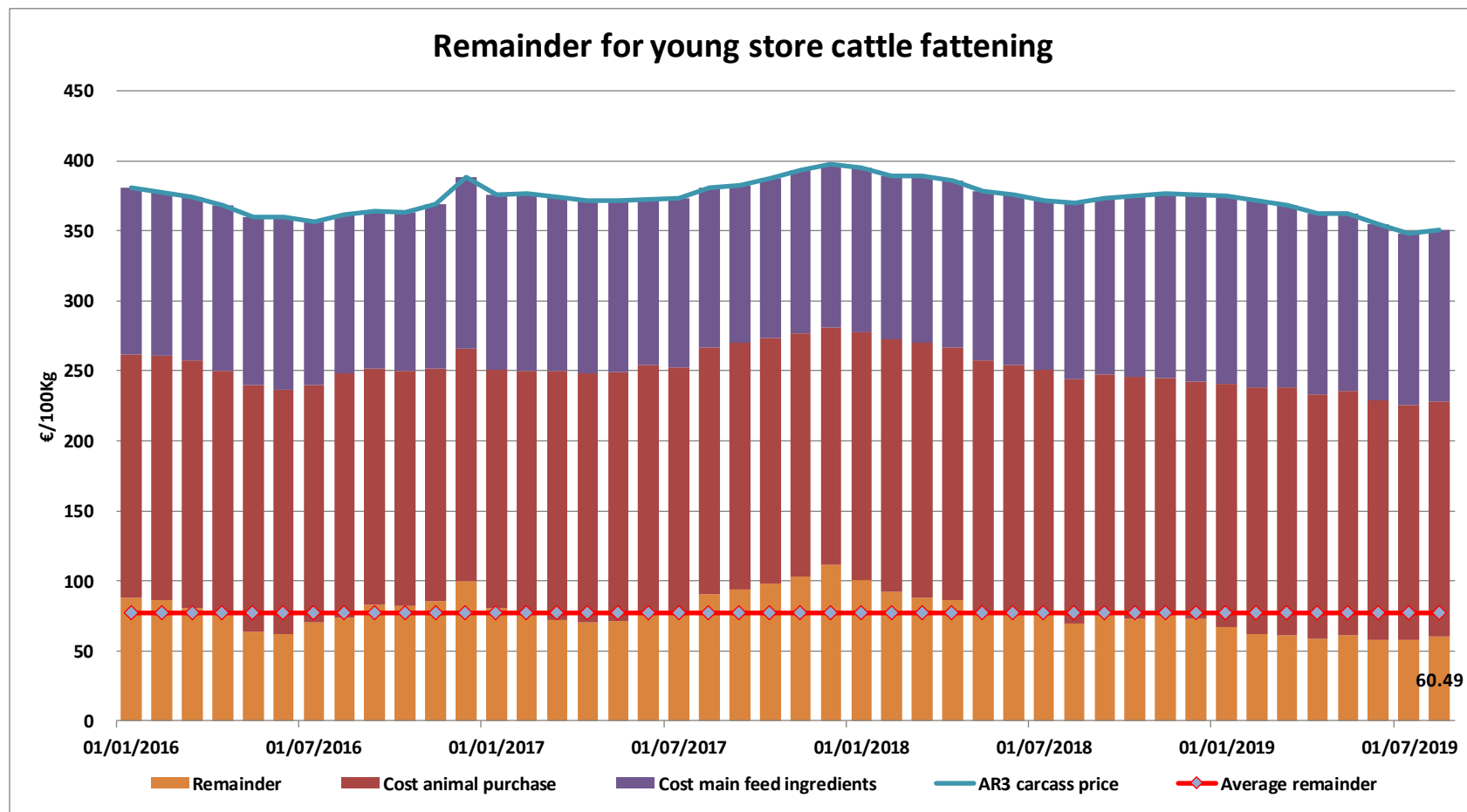
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# REMAINDERS



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# REMAINDERS



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# Forecast Summary\*

\*based on 15 MS

	2017	2018	2019	2020
<b>EU.15 PRODUCTION</b> ( 1000T )	+ 2.36% 6 921	- 0.68% 7 051	+ 1.88% 6 886	- 2.35% 6 767
<b>EU.15 CONSUMPTION</b> ( 1000T )	+ 5.55% 6 745	+ 0.59% 7 119	- 0.61% 7 161	- 0.93% 7 118
<b>BALANCE</b>	176	- 68	- 275	- 351
<b>EU.13 PRODUCTION</b> ( 1000T )	+ 6.05% 882	- 0.17% 880	+ 4.87% 923	+ 1.64% 938
<b>EU.13 CONSUMPTION</b> ( 1000T )	+ 7.52% 467	+ 6.31% 497	+ 0.46% 499	+ 0.53% 502
<b>BALANCE</b>	414	383	424	437
<b>EU.28 PRODUCTION</b> ( 1000T )	+ 0.04% 7 803	+ 1.65% 7 932	- 1.54% 7 809	- 1.33% 7 705
<b>EU.28 CONSUMPTION</b> ( 1000T )	+ 5.67% 7 587	+ 0.95% 7 658	- 0.54% 7 617	- 0.83% 7 553
<b>BALANCE</b>	216	273	192	152
<b>EU - CARCASS PRICES</b>	2017	2018	2019	2020
<b>ADULT MALE BOVINES</b> ( €/100 kg )	+ 1.7% 377.0	- 0.31% 375.9	- 0.33% 374.6	- 0.16% 374.0
<b>COWS</b> ( €/100 kg )	- 0.8% 266.9	+ 2.05% 272.4	- 0.93% 269.9	+ 1.34% 273.5

Sources : EStat New Cronos, Member States

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## SHORT-TERM OUTLOOK










FOR EU AGRICULTURAL MARKETS  
IN 2019 AND 2020

SUMMER 2019

Edition N°24

[https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/short-term-outlook-summer-2019\\_en.pdf](https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/short-term-outlook-summer-2019_en.pdf)

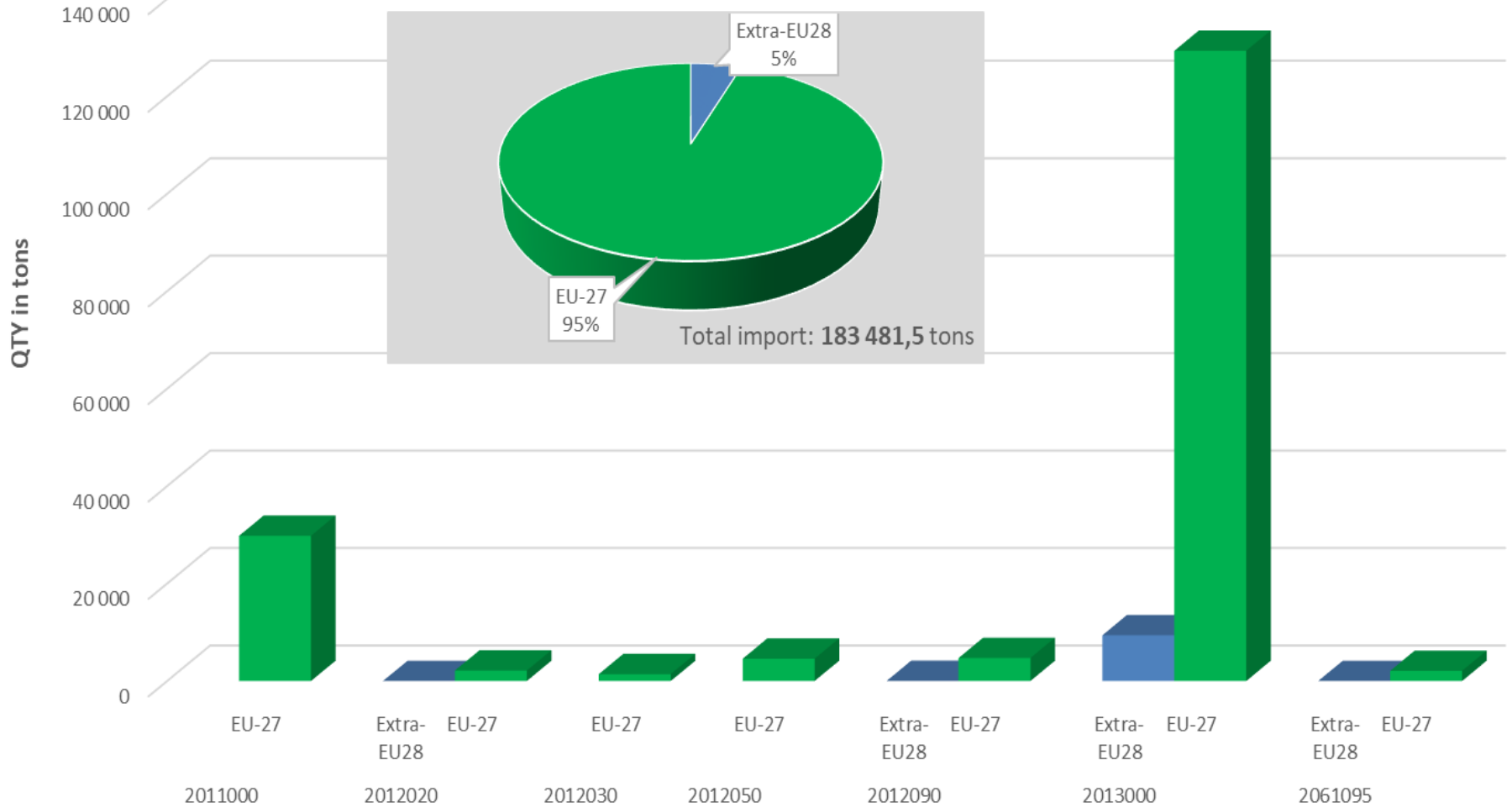
## Market developments in the EU

BEEF 	2018		2019	
Production		+1.8%		-1.1%
Exports		-7.3%		+15%
Imports		+9.5%		-2.0%
Consumption		+2.1%		-1.9%

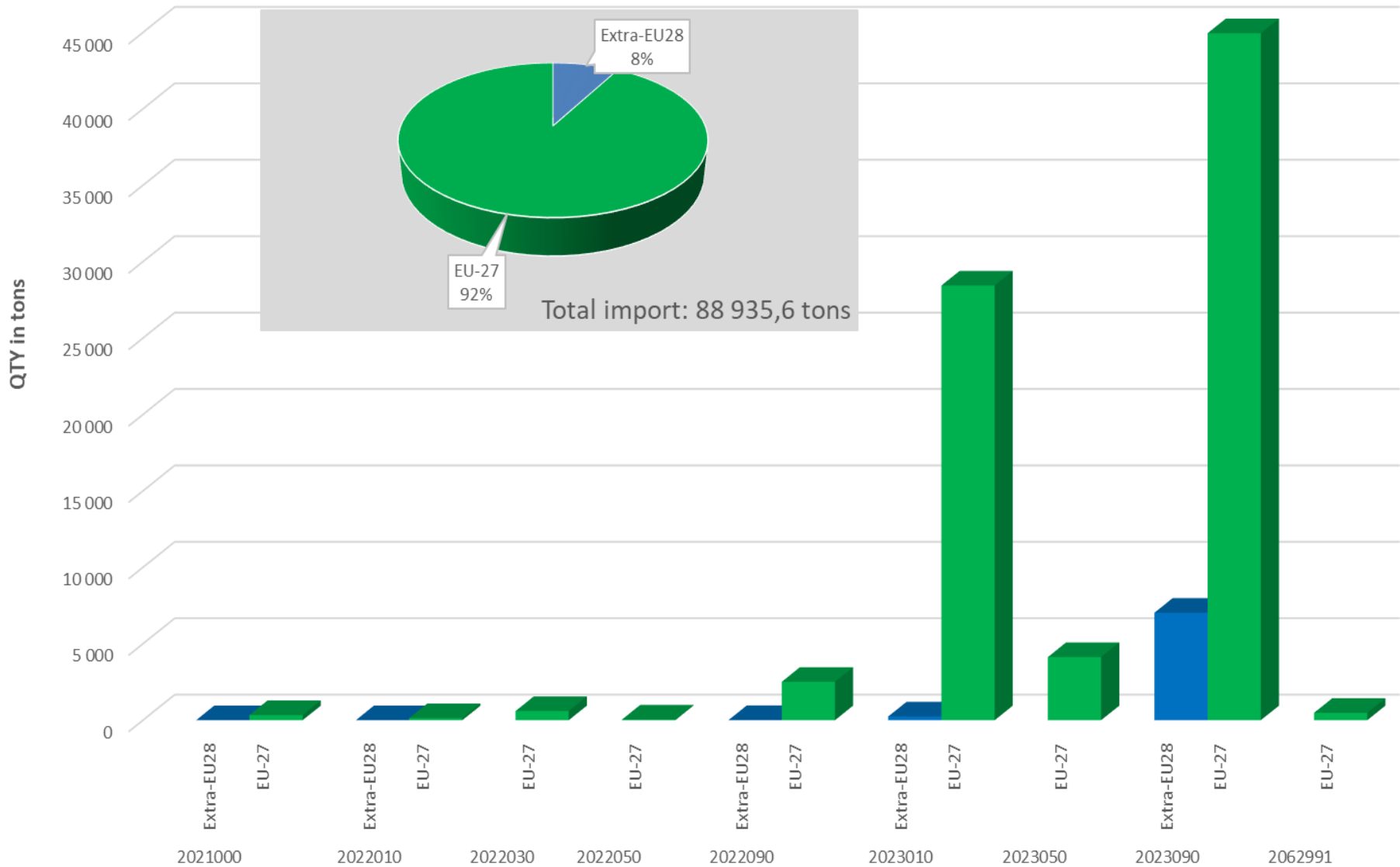


## Fresh bovine meat

UK TRQ: 124 401,5 tons

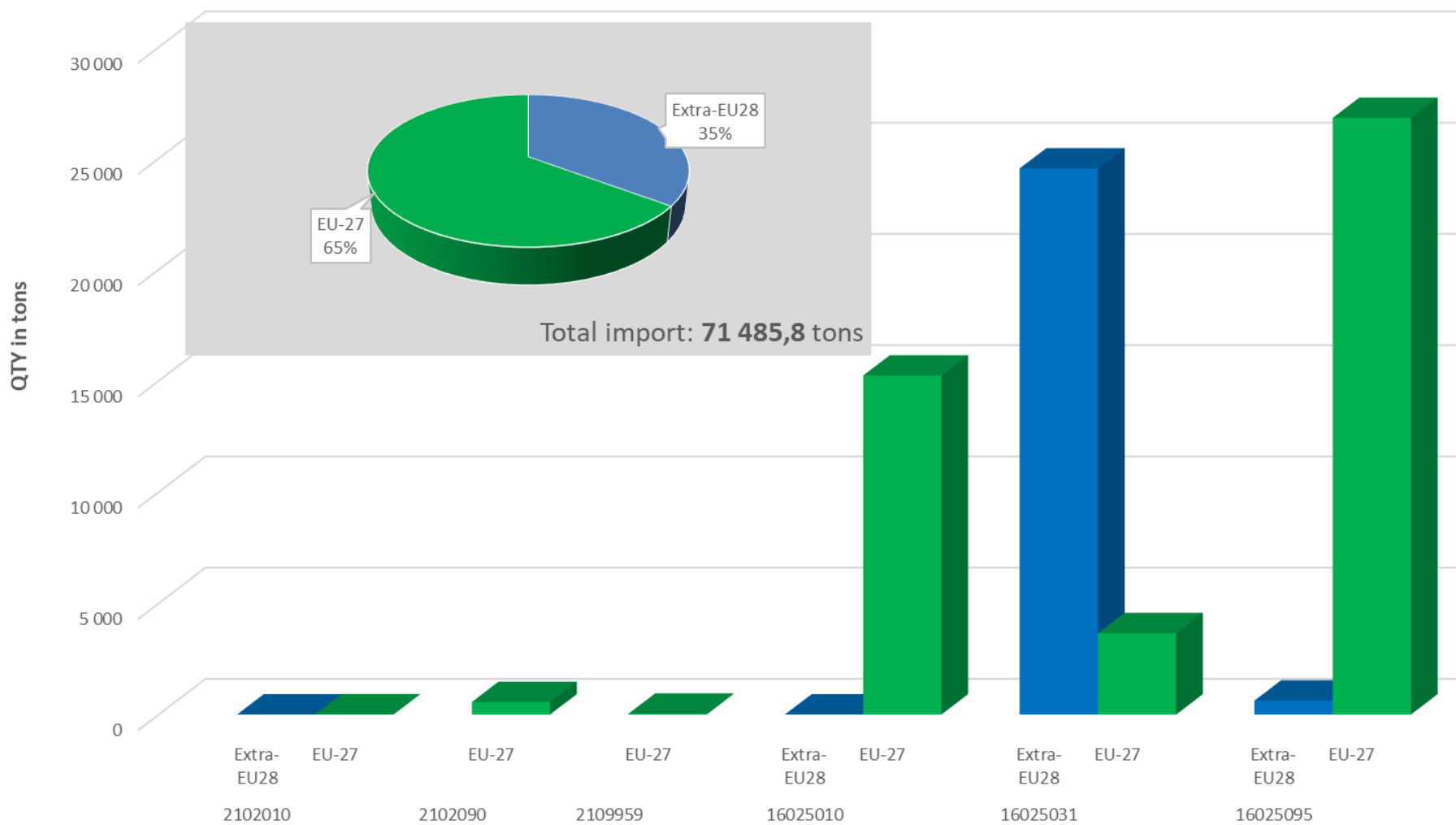


# Frozen bovine meat UK TRQ: 56 217,9 tons





# Processed bovine meat UK TRQ: 50 043,4 tons



# TRADE

# EU EXPORTS

## EU exports of beef and live animals (1): Beef & Live Animals

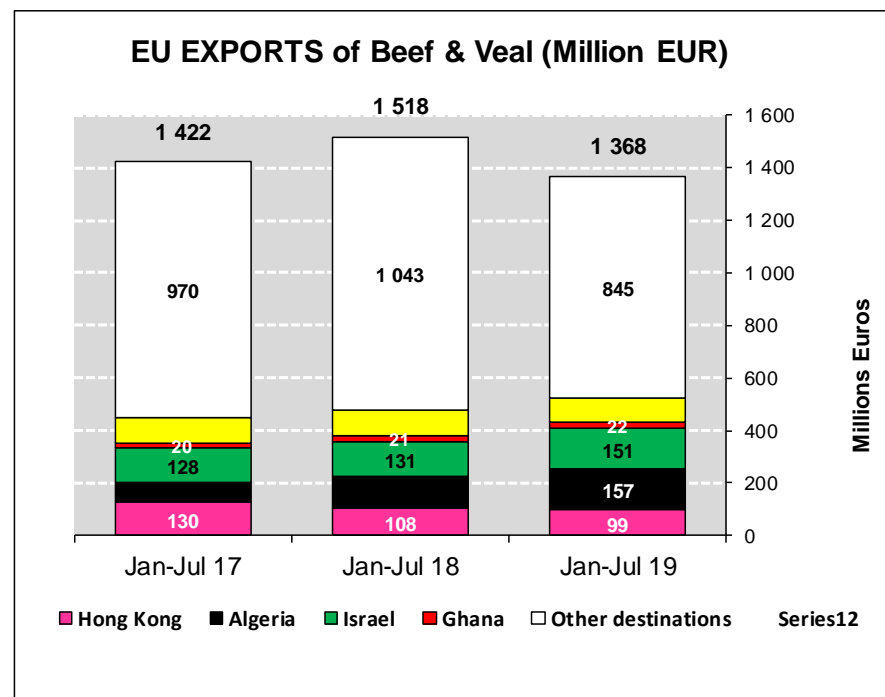
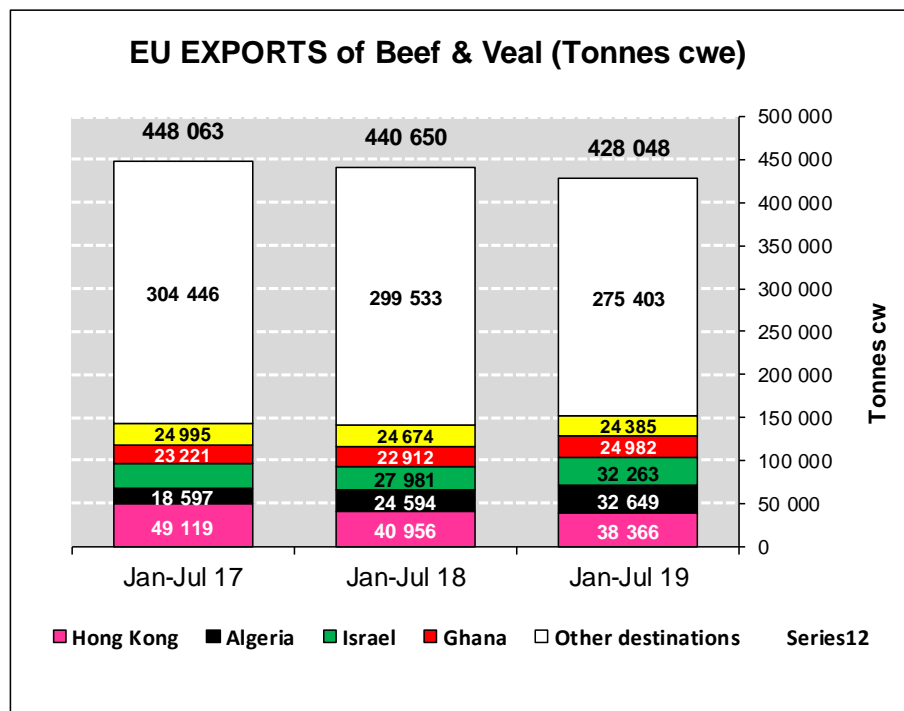
### Trade figures (COMEXT – tonnes cwe)

Destinations	2015		2016		2017		2018		Jan-Jul 19		Compared to Jan-Jul 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	45 198	7.5%	58 383	8.3%	90 659	11.9%	69 897	9.5%	38 366	9.0%	- 6.3%
Algeria	16 085	2.7%	25 004	3.5%	26 305	3.4%	35 361	4.8%	32 649	7.6%	+ 32.8%
Israel	18 851	3.1%	41 535	5.9%	44 196	5.8%	47 812	6.5%	32 263	7.5%	+ 15.3%
Ghana	39 225	6.6%	39 680	5.6%	41 007	5.4%	39 906	5.4%	24 982	5.8%	+ 9.0%
Lebanon	50 263	8.4%	47 033	6.7%	38 554	5.0%	42 525	5.8%	24 385	5.7%	- 1.2%
Bosnia-Herz.	39 896	6.7%	38 875	5.5%	34 711	4.5%	38 763	5.3%	23 714	5.5%	+ 17.5%
Philippines	13 052	2.2%	24 454	3.5%	38 271	5.0%	29 794	4.1%	21 559	5.0%	+ 35.8%
Ivory Coast	36 018	6.0%	37 210	5.3%	38 582	5.0%	37 744	5.1%	20 272	4.7%	- 6.6%
Switzerland	26 015	4.3%	25 599	3.6%	27 369	3.6%	24 416	3.3%	15 572	3.6%	+ 0.7%
Turkey	57 504	9.6%	71 030	10.1%	96 414	12.6%	95 550	13.0%	13 263	3.1%	- 81.6%
Libya	19 691	3.3%	29 723	4.2%	27 848	3.6%	27 832	3.8%	12 548	2.9%	- 36.4%
China	6 027	1.0%	10 804	1.5%	6 229	0.8%	7 457	1.0%	11 648	2.7%	+++
Russia	13 546	2.3%	16 433	2.3%	22 989	3.0%	17 336	2.4%	11 179	2.6%	+ 25.5%
Chile	50	0.0%	2 228	0.3%	8 961	1.2%	16 410	2.2%	9 504	2.2%	+ 22.6%
South Africa	7 508	1.3%	7 335	1.0%	7 569	1.0%	12 113	1.7%	7 785	1.8%	- 3.5%
Morocco	4 703	0.8%	7 517	1.1%	10 005	1.3%	11 430	1.6%	7 296	1.7%	+ 8.0%
Ukraine	2 859	0.5%	7 875	1.1%	7 331	1.0%	10 465	1.4%	7 246	1.7%	+ 36.1%
Other Destinations	202 225	33.8%	215 988	30.6%	197 167	25.8%	168 706	23.0%	113 817	26.6%	
Extra-EU	598 715		706 705		764 166		733 516		428 048		
% change			+ 18%		+ 8%		- 4%		- 2.9%		

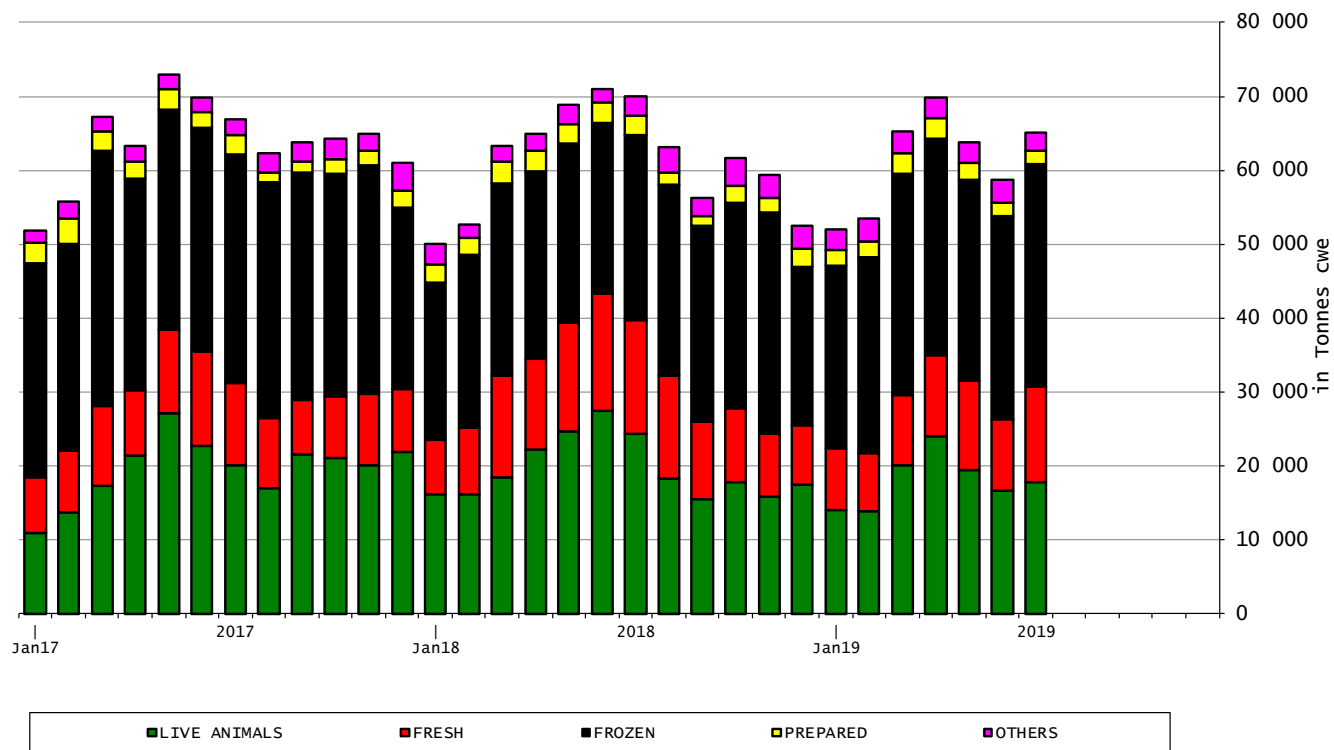
### EU exports of beef: Trade figures (COMEXT – tonnes cwe)

Destinations	2015		2016		2017		2018		Jan-Jul 19		Compared to Jan-Jul 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	45 198	10.7%	58 383	12.0%	90 659	17.1%	69 897	14.0%	38 366	12.7%	- 6.3%
Ghana	39 225	9.3%	39 680	8.1%	41 007	7.8%	39 906	8.0%	24 982	8.3%	+ 9.0%
Bosnia-Herz.	36 593	8.7%	36 790	7.6%	32 181	6.1%	36 152	7.2%	22 439	7.4%	+ 18.5%
Philippines	13 052	3.1%	24 454	5.0%	38 271	7.2%	29 794	6.0%	21 559	7.1%	+ 35.8%
Ivory Coast	36 016	8.6%	37 210	7.6%	38 572	7.3%	37 744	7.6%	20 272	6.7%	- 6.6%
Switzerland	25 006	5.9%	24 425	5.0%	26 231	5.0%	23 364	4.7%	14 927	4.9%	+ 1.1%
Israel	6 087	1.4%	15 056	3.1%	18 749	3.5%	22 207	4.4%	14 434	4.8%	+ 11.2%
China	6 027	1.4%	10 804	2.2%	6 229	1.2%	7 457	1.5%	11 648	3.9%	+++
Algeria	6 662	1.6%	10 726	2.2%	12 304	2.3%	13 919	2.8%	10 463	3.5%	+ 31.2%
Chile	50	0.0%	2 228	0.5%	8 961	1.7%	16 410	3.3%	9 504	3.1%	+ 22.6%
South Africa	7 508	1.8%	7 335	1.5%	7 569	1.4%	12 113	2.4%	7 785	2.6%	- 3.5%
Ukraine	2 747	0.7%	7 094	1.5%	6 926	1.3%	9 887	2.0%	7 012	2.3%	+ 41.3%
Vietnam	11 881	2.8%	22 308	4.6%	14 205	2.7%	9 171	1.8%	6 950	2.3%	+ 68.6%
North Macedonia	12 375	2.9%	11 479	2.4%	11 285	2.1%	10 002	2.0%	6 363	2.1%	+ 10.7%
Norway	19 122	4.5%	18 318	3.8%	12 858	2.4%	7 980	1.6%	4 844	1.6%	- 24.9%
USA	2 633	0.6%	3 855	0.8%	4 576	0.9%	5 830	1.2%	4 695	1.6%	+ 58.2%
Japan	2 225	0.5%	3 265	0.7%	4 293	0.8%	3 355	0.7%	4 437	1.5%	+++
Other Destinations	148 415	35.3%	153 480	31.5%	154 148	29.1%	143 893	28.8%	71 072	23.6%	
Extra-EU	420 822		486 889		529 023		499 079		301 751		
% change			+ 16%		+ 9%		- 6%		+ 3.6%		

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



EU-28 Exports of BEEF products



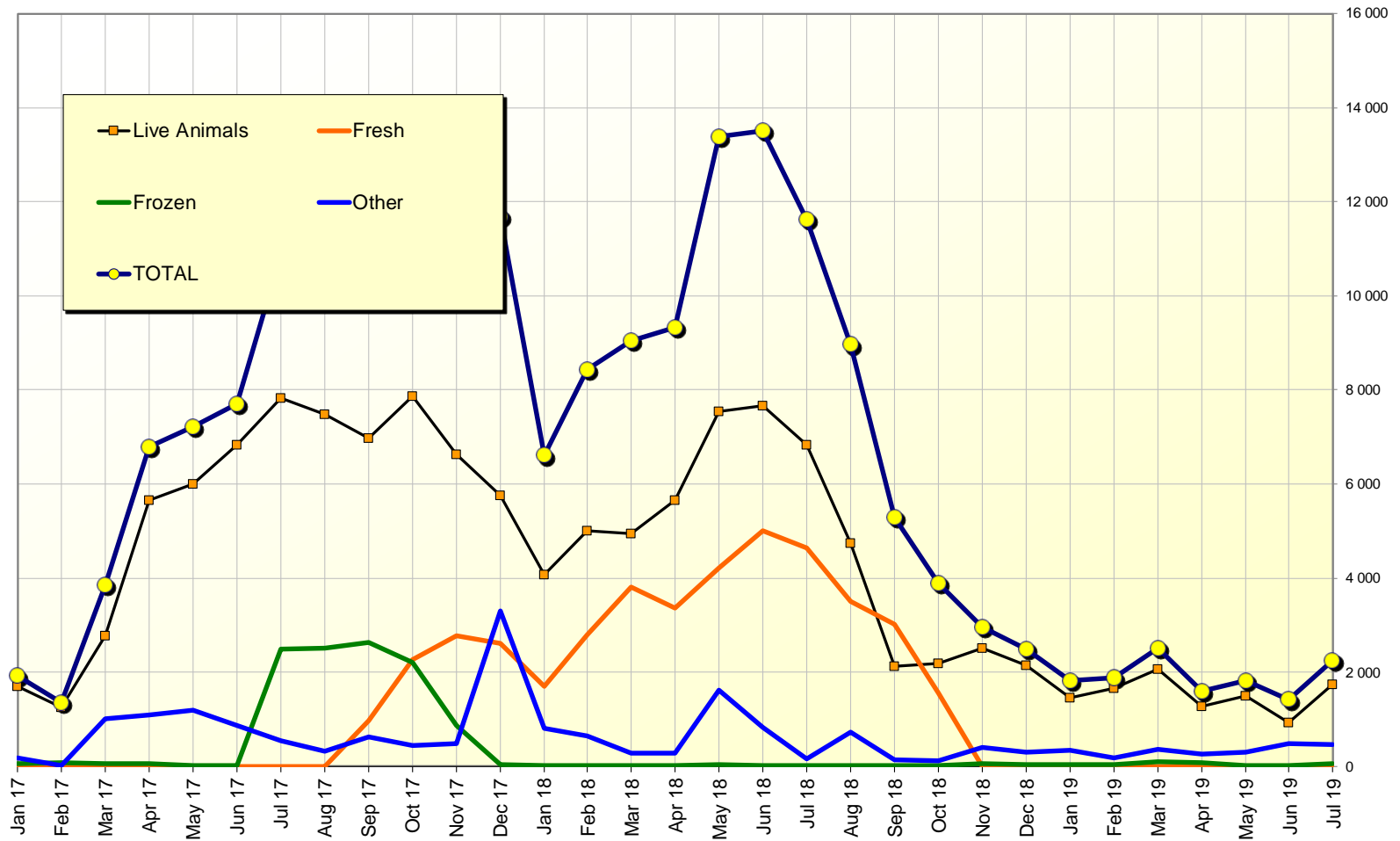


# TRADE

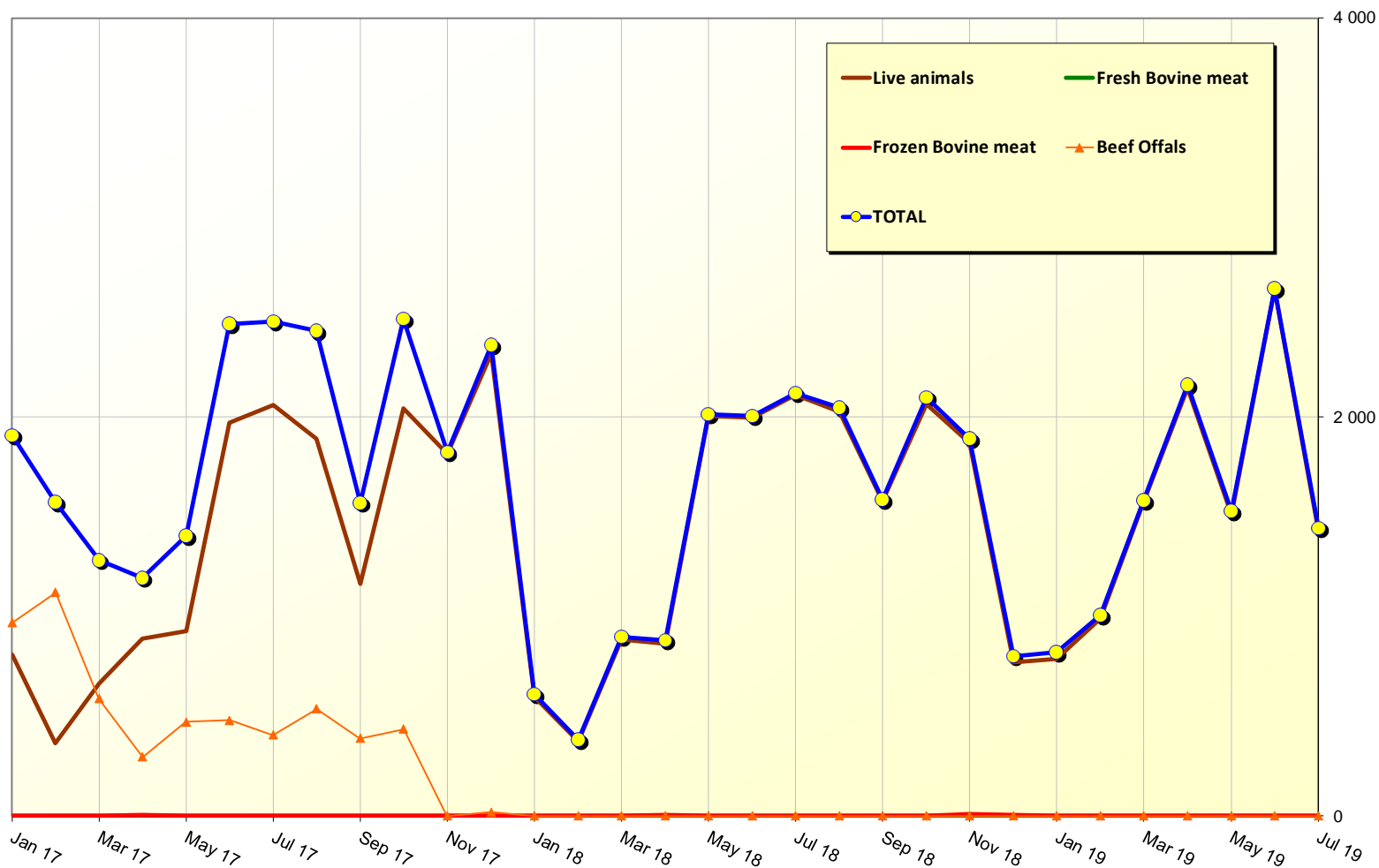
# EU EXPORTS

## Beef to TURKEY

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

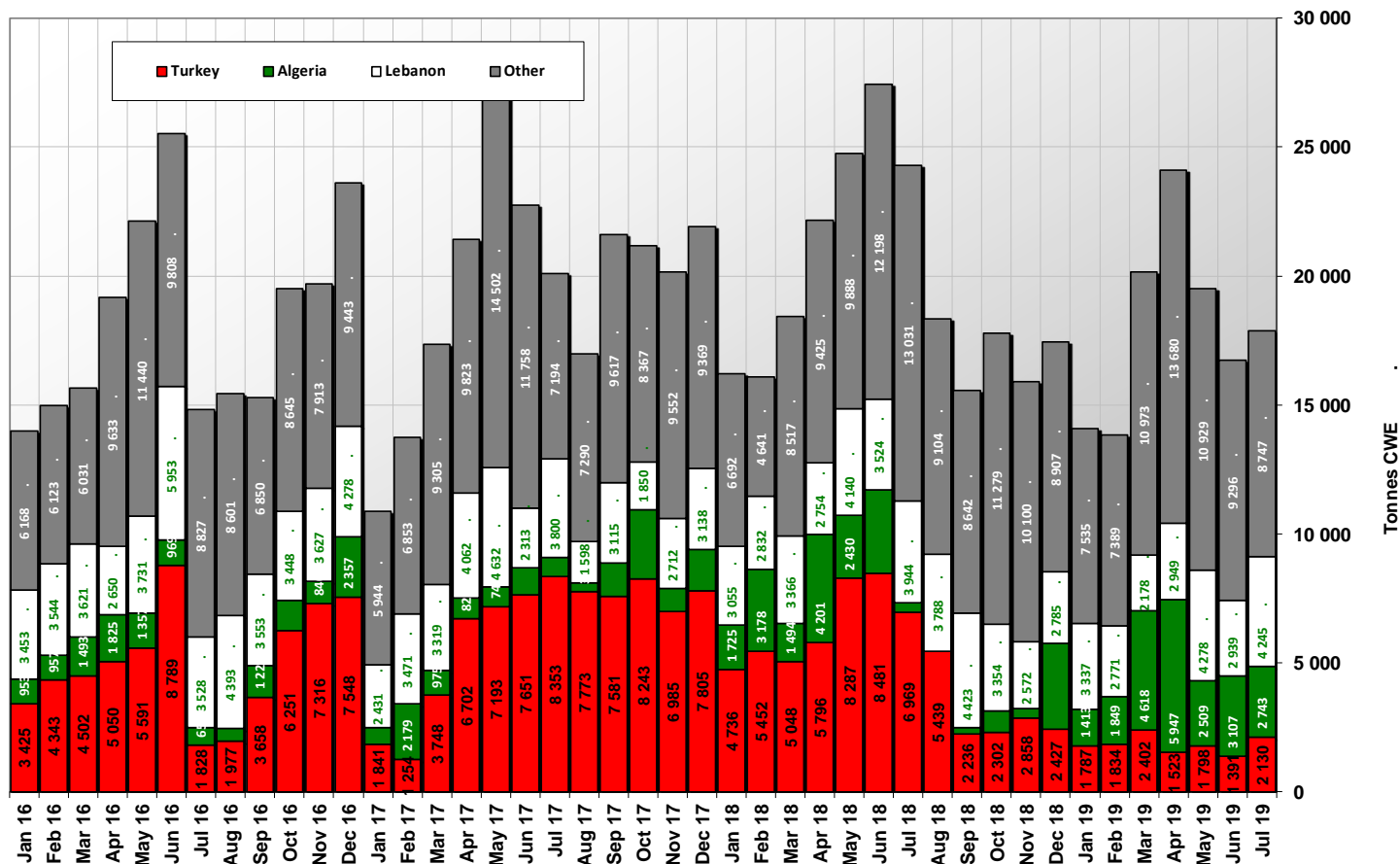


**EU beef Exports to RUSSIA**  
Trade figures (COMEXT data) *tonnes cwe*



## EU-28 Exports of LIVE Bovine Animals

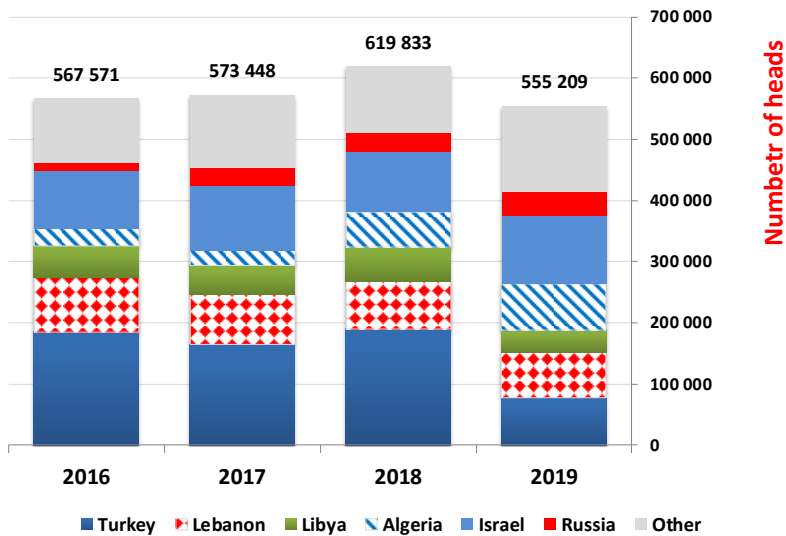
(Source COMEXT - Tonnes cwe)



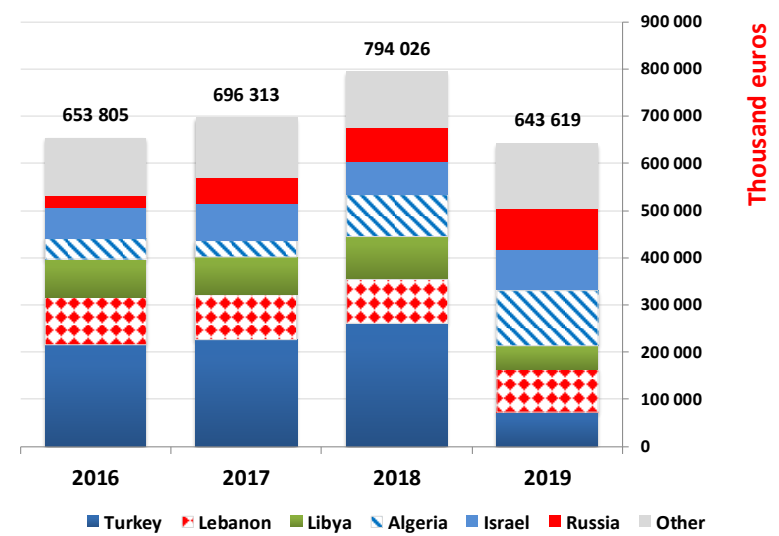
# TRADE

# EU EXPORTS Live Animals

EU Exports of BEEF live animals by partner for the period Jan-Jul 2019



EU Exports of BEEF live animals by partner for the period Jan-Jul 2019

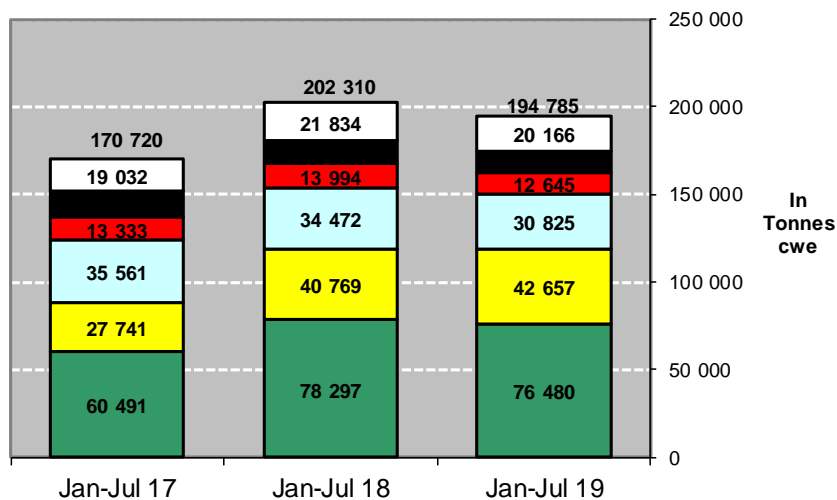


### EU imports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

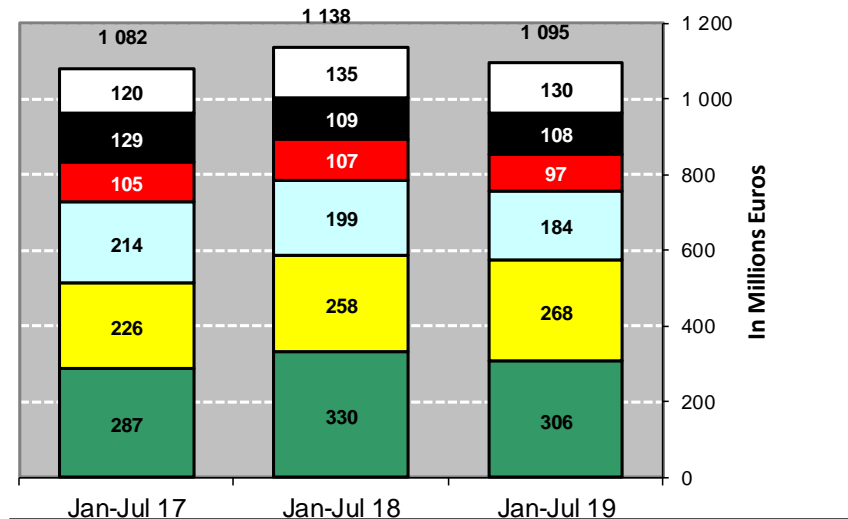
Origins	2015		2016		2017		2018		Jan-Jul 19		Compared to Jan-Jul 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	136 858	42.4%	140 319	42.0%	115 392	37.7%	140 243	41.1%	76 480	39.3%	- 2.3%
Argentina	42 149	13.0%	43 542	13.0%	49 890	16.3%	69 996	20.5%	42 657	21.9%	+ 4.6%
Uruguay	46 287	14.3%	56 747	17.0%	57 985	18.9%	52 462	15.4%	30 825	15.8%	- 10.6%
Australia	30 884	9.6%	27 850	8.3%	21 990	7.2%	20 868	6.1%	12 645	6.5%	- 9.6%
USA	24 132	7.5%	20 499	6.1%	21 624	7.1%	19 319	5.7%	12 012	6.2%	- 7.2%
New Zealand	11 380	3.5%	9 869	3.0%	8 093	2.6%	8 669	2.5%	4 756	2.4%	- 9.8%
Namibia	12 112	3.7%	10 686	3.2%	7 705	2.5%	5 585	1.6%	4 752	2.4%	+ 28.3%
Paraguay	1 915	0.6%	5 979	1.8%	6 915	2.3%	6 287	1.8%	2 955	1.5%	- 25.1%
Switzerland	5 090	1.6%	5 500	1.6%	5 138	1.7%	5 437	1.6%	2 410	1.2%	- 21.3%
Botswana	9 258	2.9%	9 382	2.8%	7 718	2.5%	7 025	2.1%	2 008	1.0%	- 40.6%
Canada	428	0.1%	421	0.1%	513	0.2%	1 343	0.4%	1 302	0.7%	+++
Serbia	439	0.1%	557	0.2%	565	0.2%	1 162	0.3%	595	0.3%	- 16.5%
Japan	359	0.1%	579	0.2%	693	0.2%	859	0.3%	545	0.3%	+ 20.9%
Other Origins	1 810	0.6%	2 022	0.6%	1 842	0.6%	1 797	0.5%	843	0.4%	
Extra-EU	323 099		333 952		306 064		341 053		194 785		
% change			+ 3%		- 8%		+ 11%		- 3.7%		

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

IMPORTS of Beef & Veal into EU (Tonnes cwe)



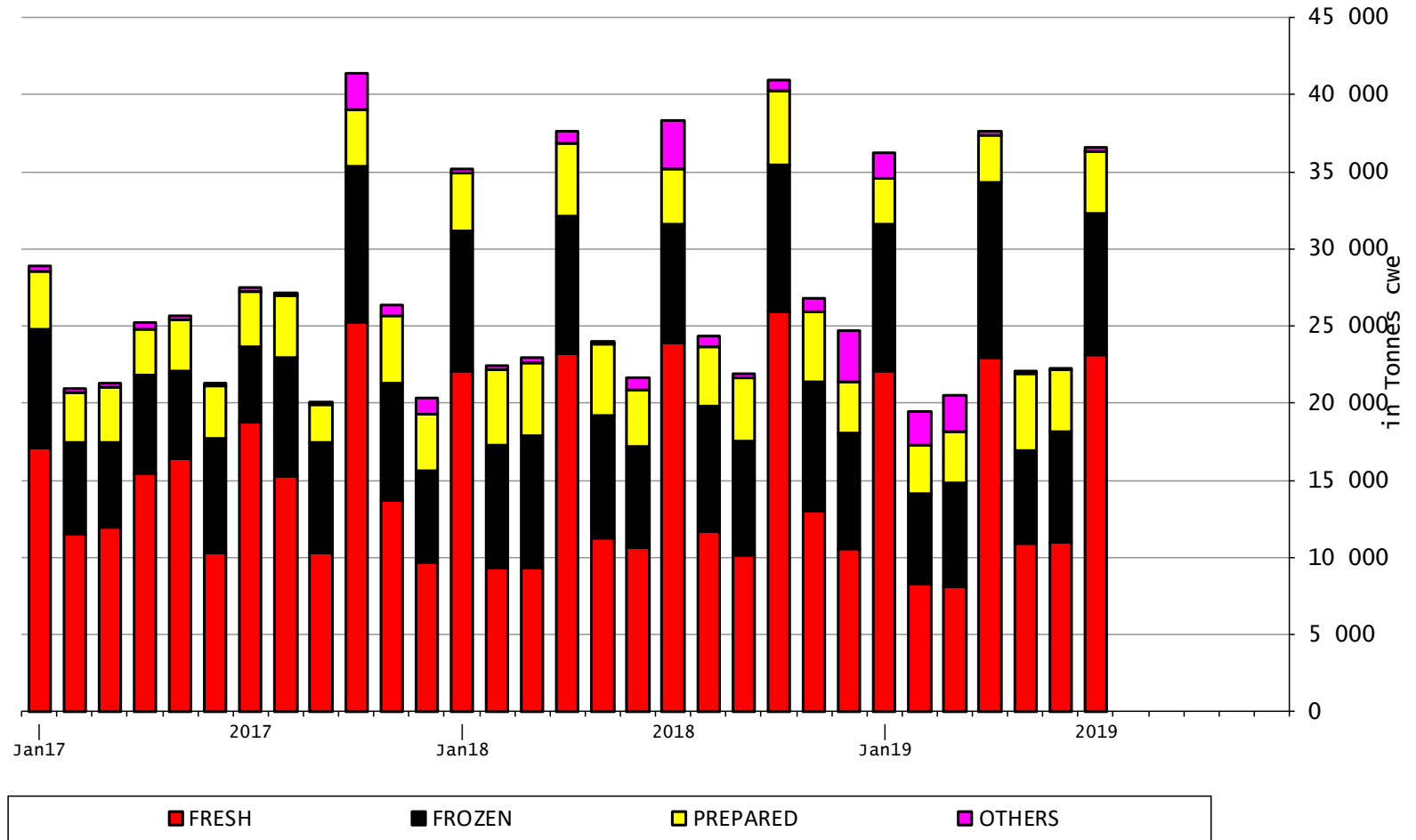
IMPORTS of Beef & Veal into EU (Million EUR)



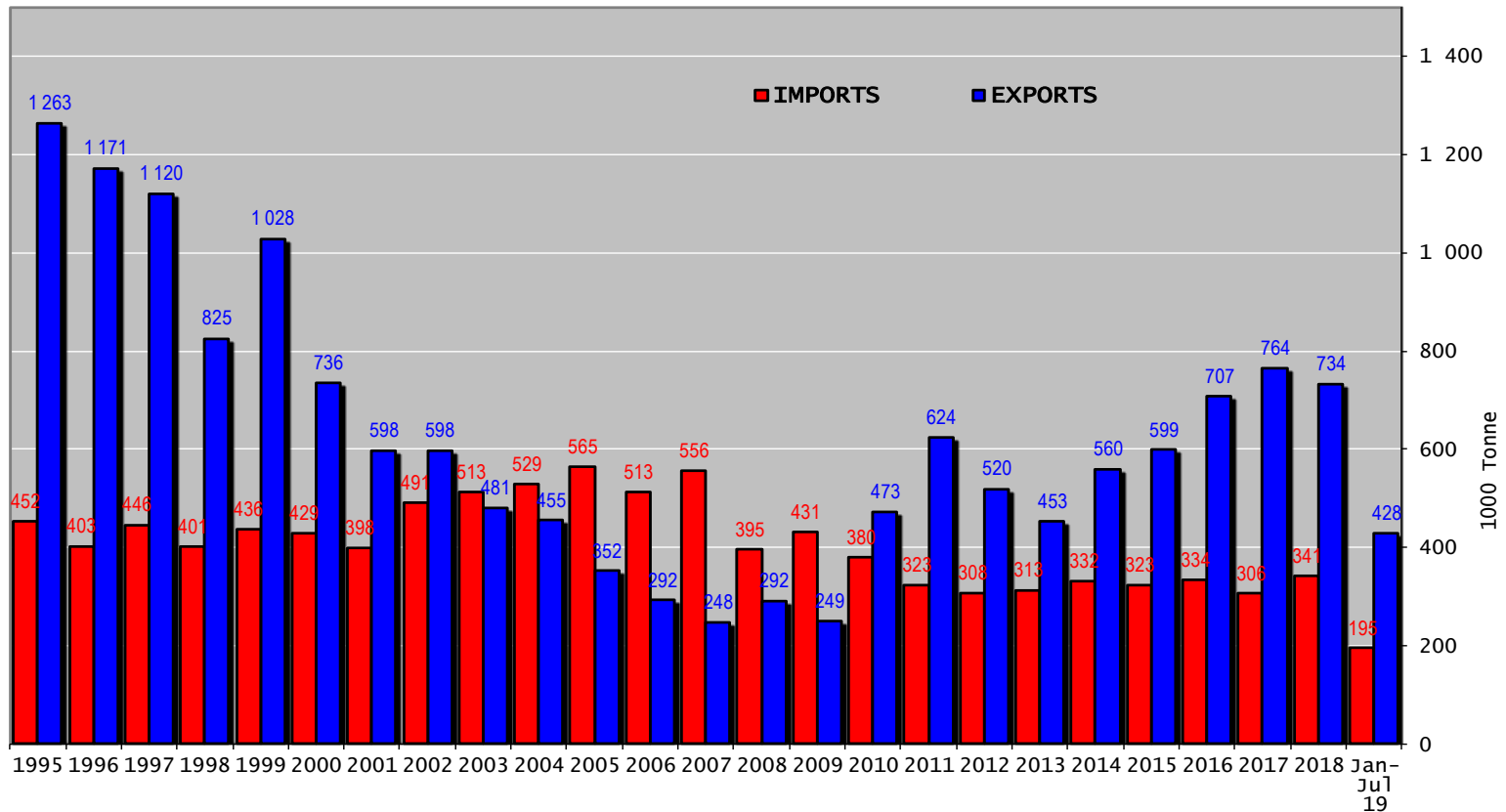
# TRADE

## EU IMPORTS Beef Products

### EU-28 Imports of BEEF products

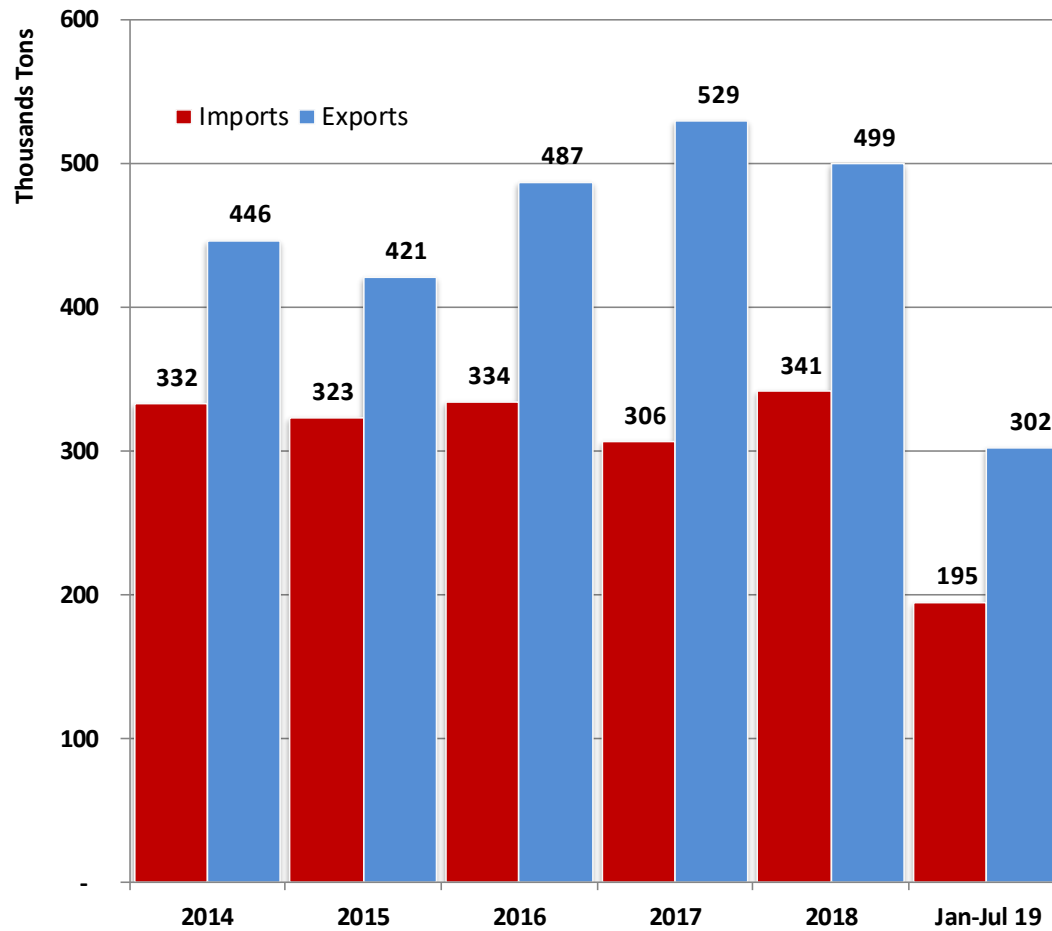


### Trade balance of beef and live animals

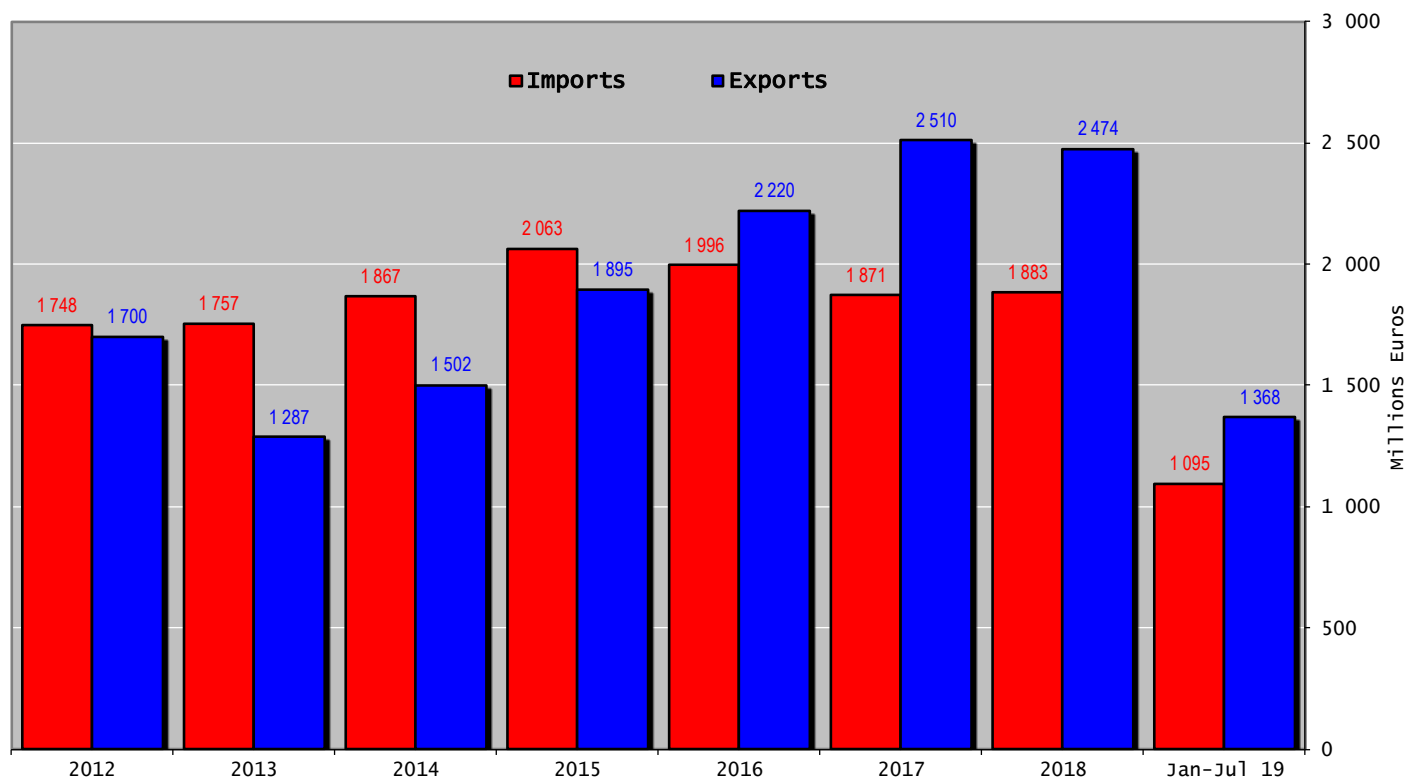




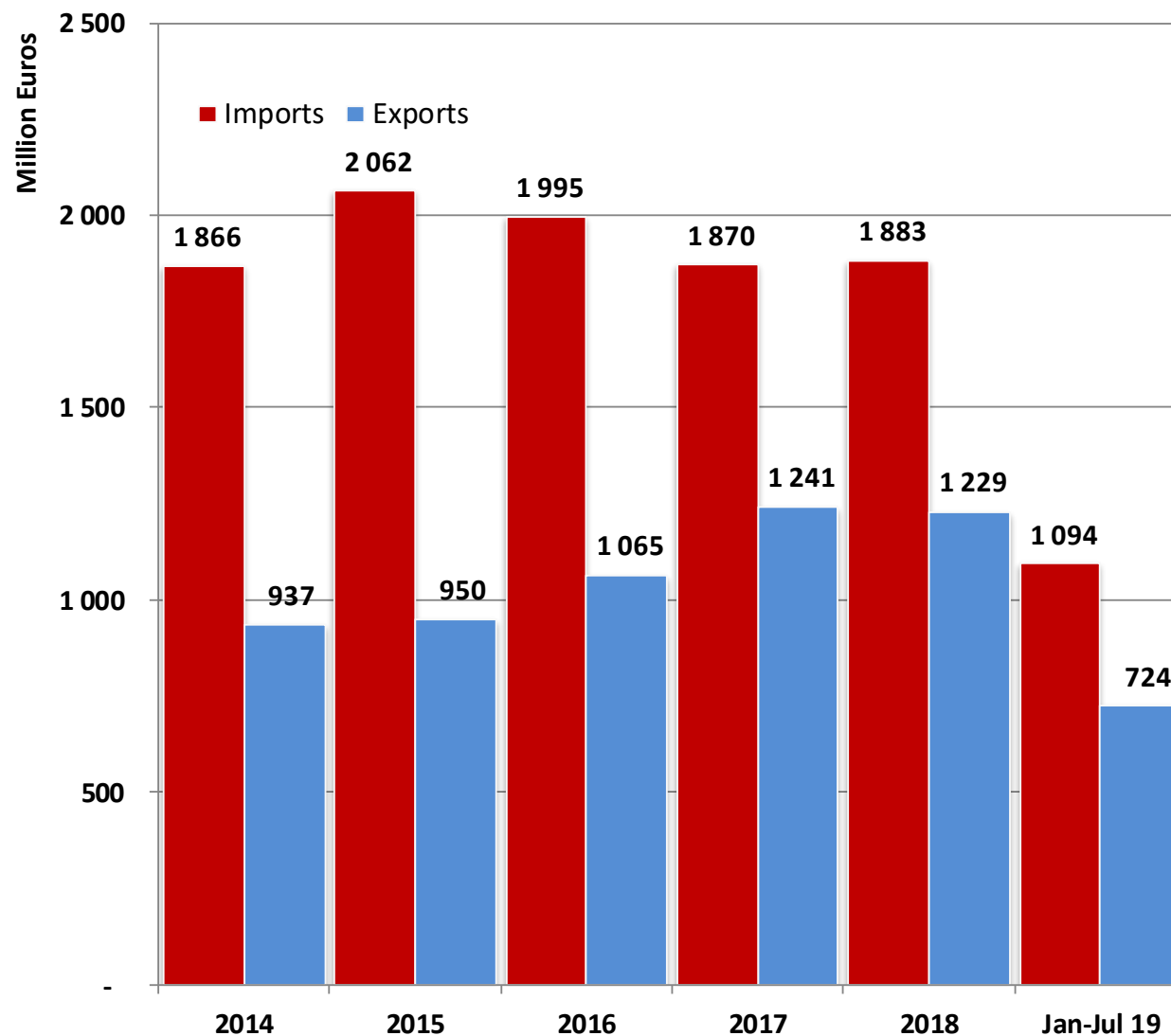
## EU Trade of Beef Products (except Live Animals)



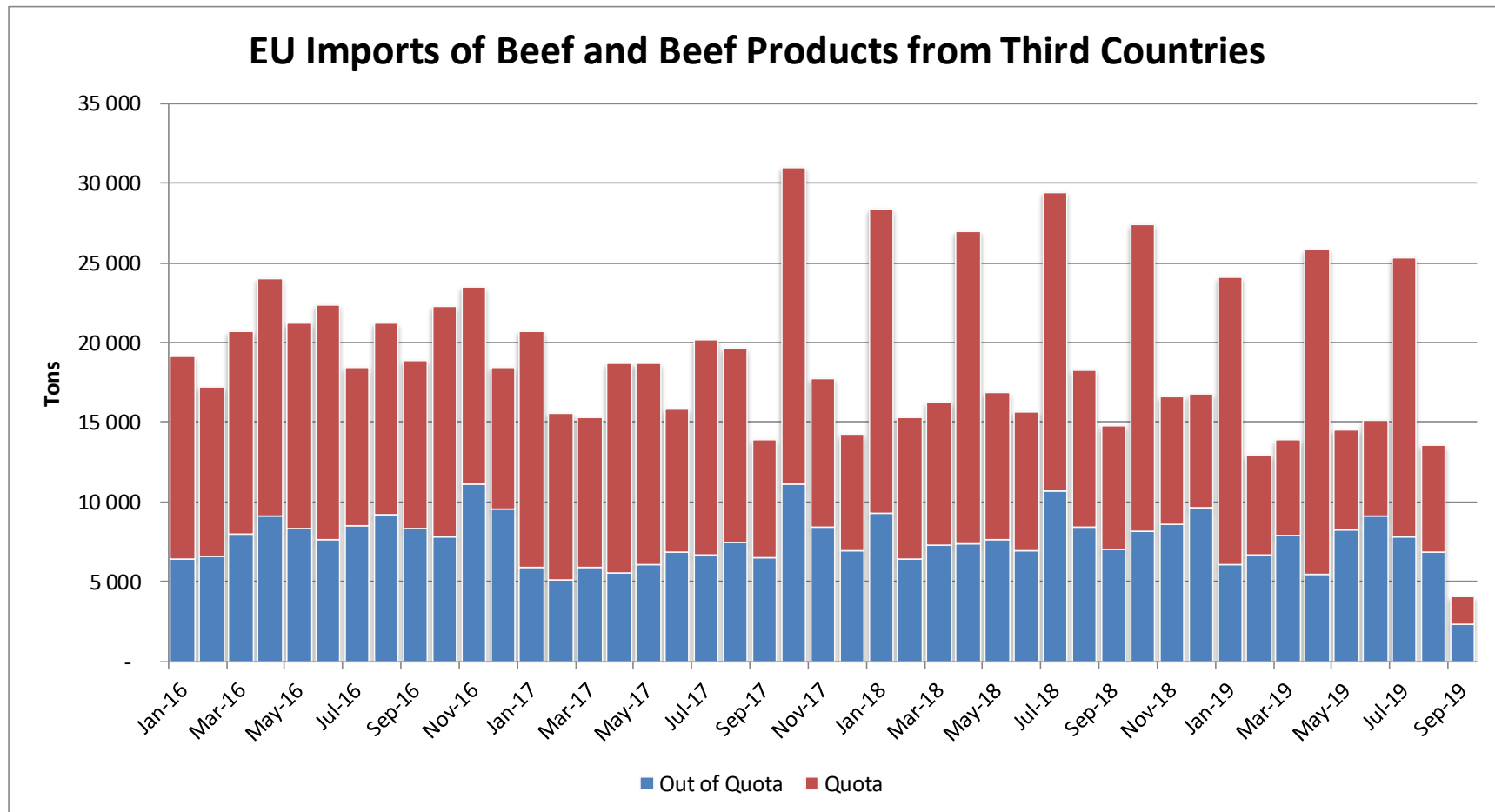
### Trade balance of beef and live animals



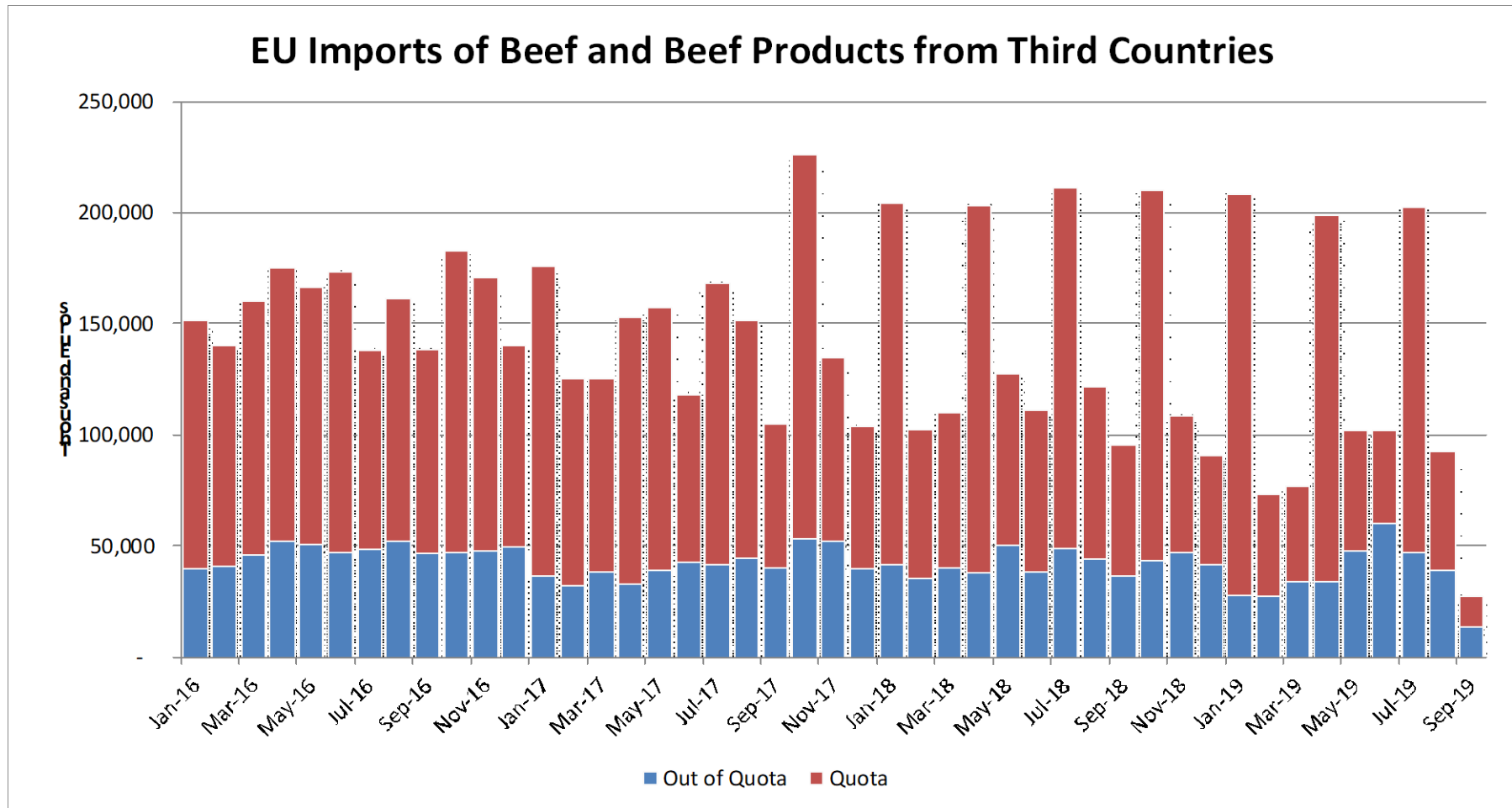
## EU Trade of Beef Products (except Live Animals)



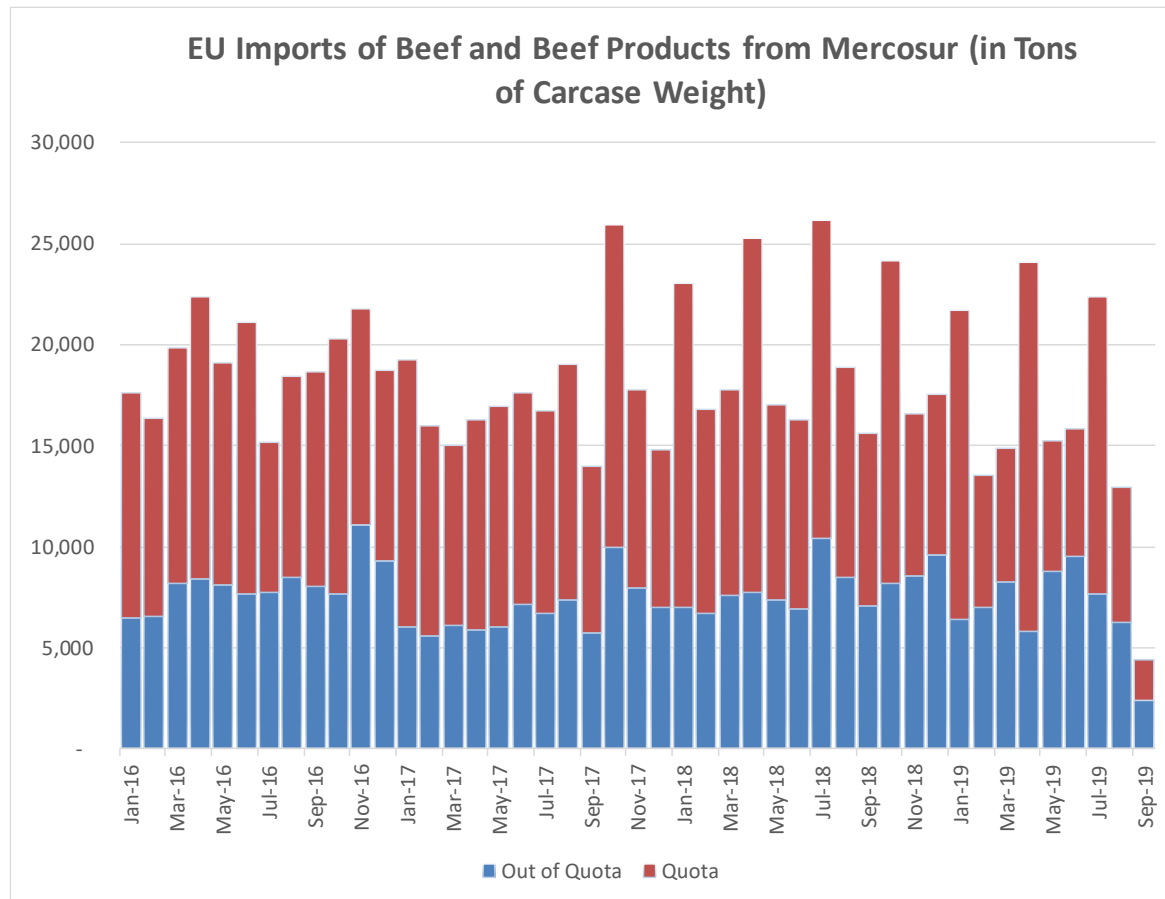
# Imports in and out of TRQs



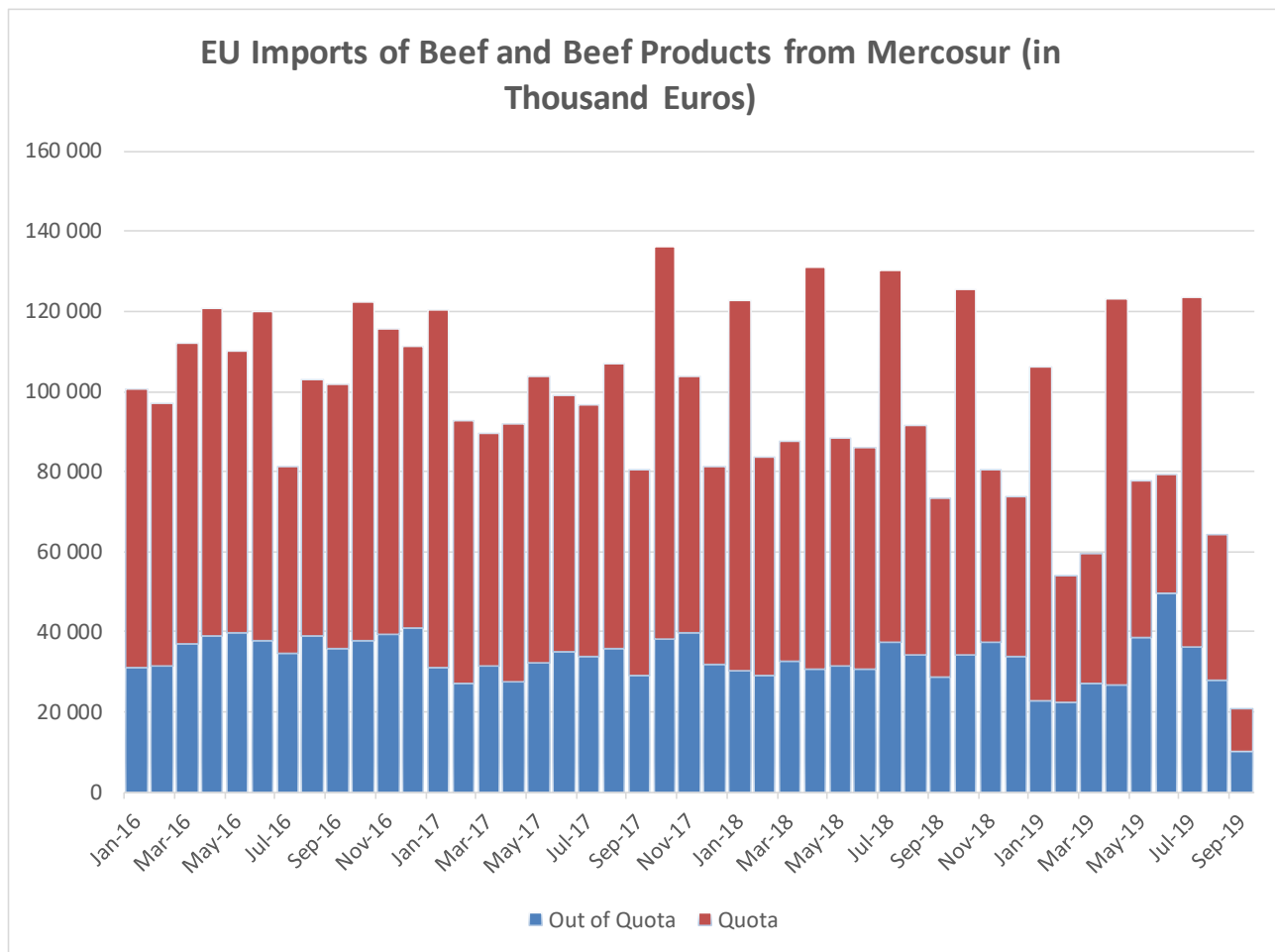
# Imports in and out of TRQs



# Imports in and out of TRQs



# Imports in and out of TRQs



# 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%	11.05	5.53%
09.4450	Argentina	29 500	23 111.89	78.35%	28 091.29	95.22%	29 491.35	99.97%
09.4451	Australia	7 150	4 051.04	56.66%	5 333.48	74.59%	4 942.02	69.12%
09.4452	Uruguay	6 376	6 365.55	99.84%	6 363.24	99.80%	6 363.76	99.81%
09.4453	Brazil	10 000	8 572.40	85.72%	5 057.27	50.57%	4 147.19	41.47%
09.4454	New Zealand	1 300	1 161.63	89.36%	1 122.25	86.33%	980.60	75.43%
09.4002	Canada/US	11 500	421.40	3.66%	2 351.37	20.45%	3 883.04	33.77%
09.4455	Paraguay	1 000	982.60	98.26%	962.21	96.22%	935.41	93.54%
Total Beef		66 826	44 666.51	66.84%	49 281.11	73.75%	50 743.37	75.93%
Total Buffalo		2 450	12.75	0.52%	14.67	0.60%	11.05	0.45%
Total		69 276	44 679.26	64.49%	49 295.78	71.16%	50 754.42	73.26%

\* up to 30/06/2019



# High Quality Beef Import Quotas

Quota erga omnes

Regulation (EU) No 481/2012

	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	11 102 282	11 161 480	10 859 149	45 174 725
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	11 308 718	11 338 520	
	100.00%	99.49%	98.70%	95.77%	

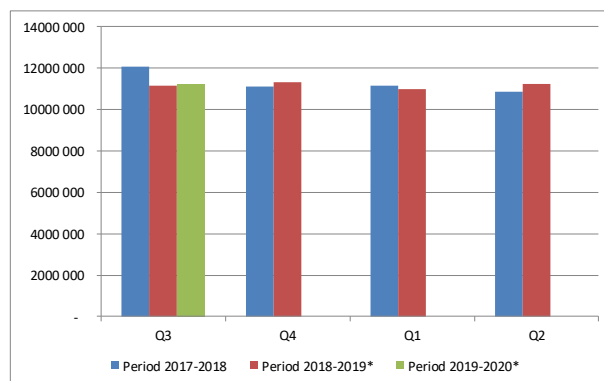
	2018-Q3	2018-Q4	2019-Q1	2019-Q2	TOTAL
Period 2018-2019*	11 164 832	11 319 134	10 972 635	11 255 802	44 712 403
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.24%	100.00%	97.53%	100.00%	99.36%

Available after transfer	11 250 000	11 335 168	11 180 866	11 527 365	
	99.24%	99.86%	98.14%	97.64%	

	2019-Q3	2019-Q4	2020-Q1	2020-Q2	TOTAL
Period 2019-2020*	11 247 566	-	-	-	11 247 566
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.98%				24.99%

Available after transfer	11 250 000				
	99.98%				

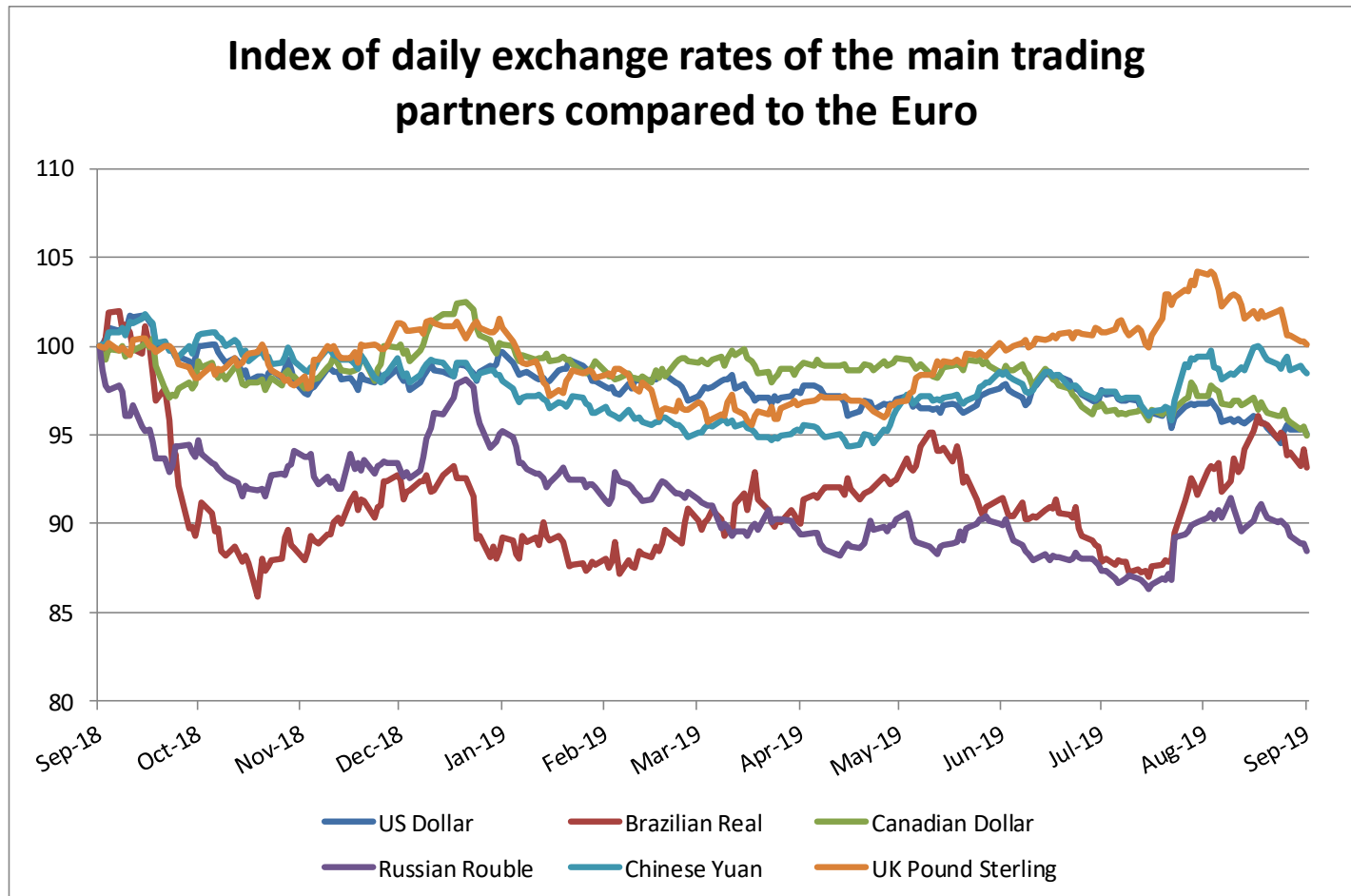
\* Until 12.09.2019



# WORLD BEEF MARKET

EXCHANGE RATE INDEX / Euro

Main Trading Partners



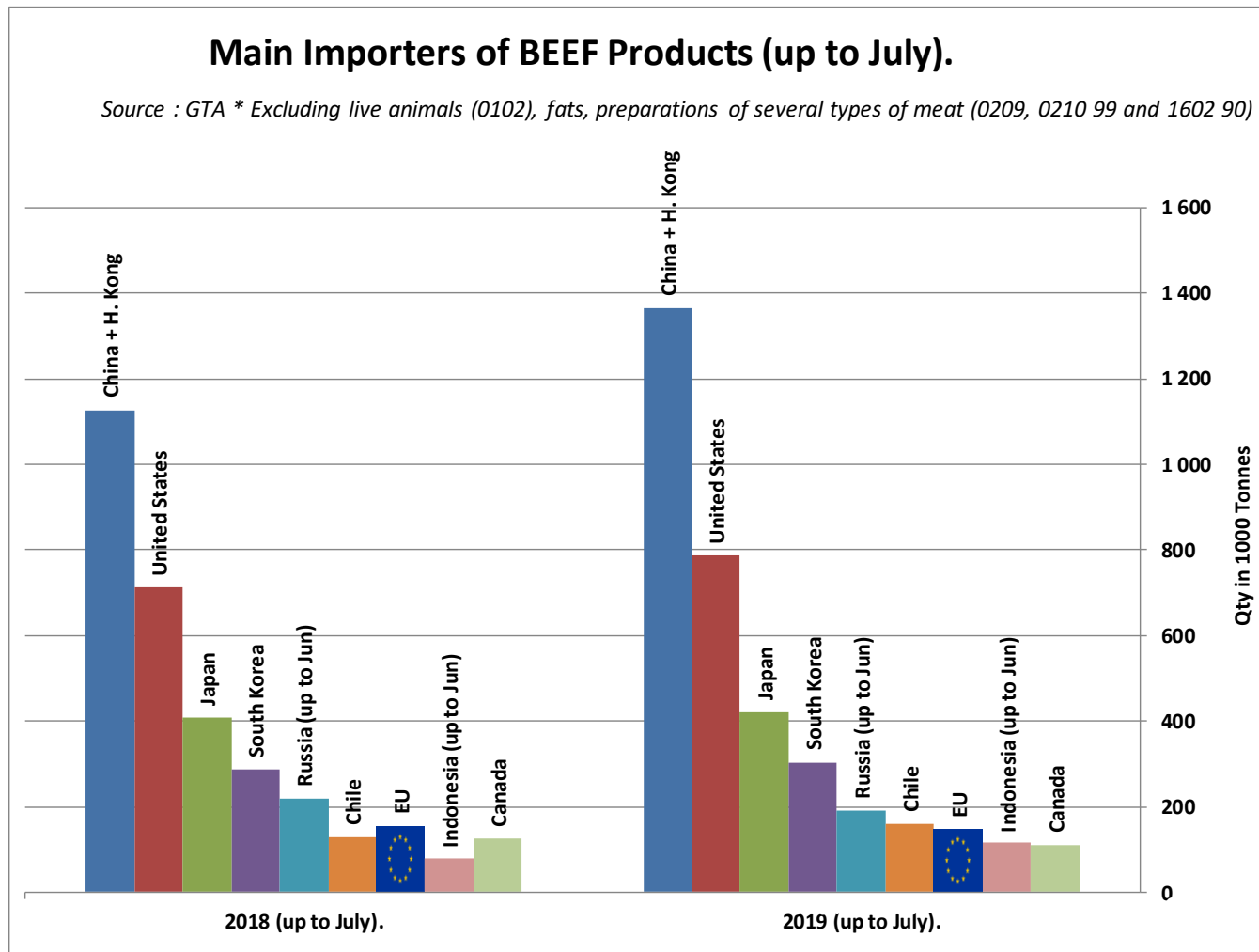
Source : ECB

# 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)



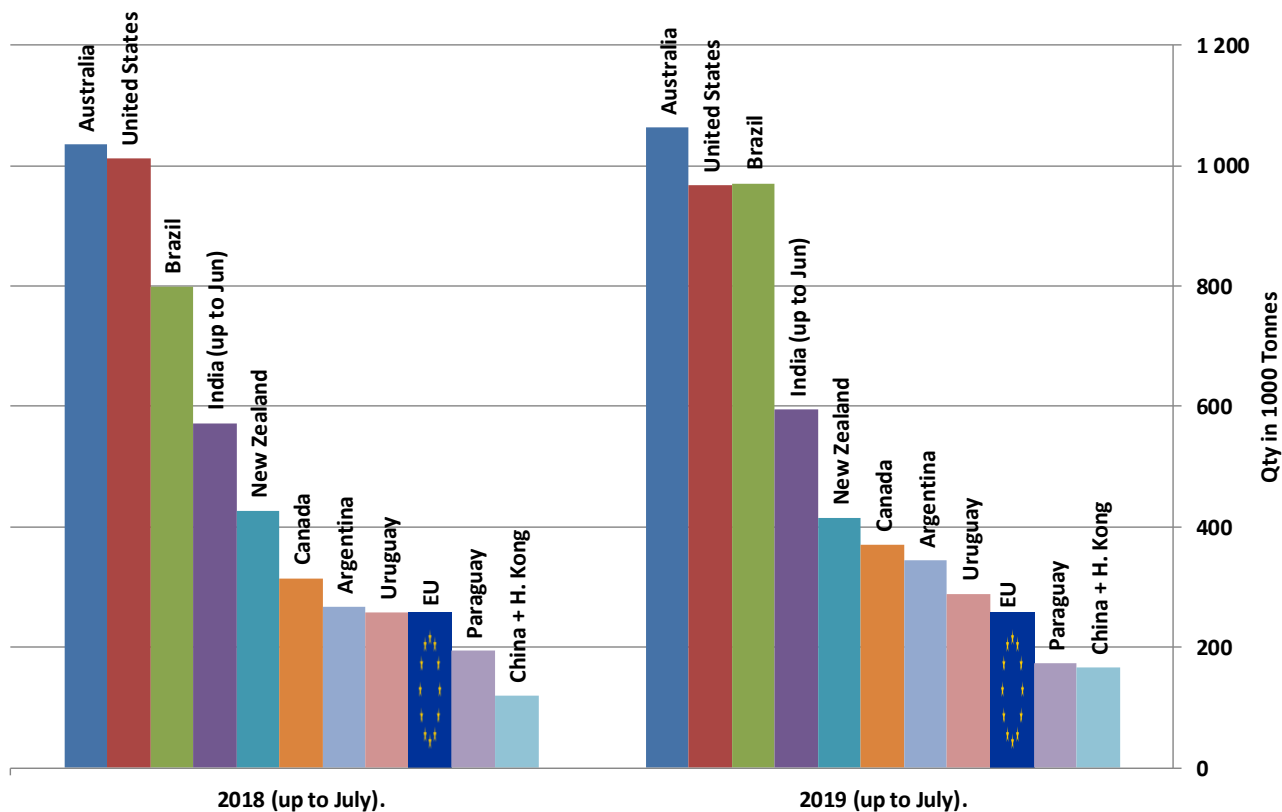
# WORLD BEEF MARKET

# 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)

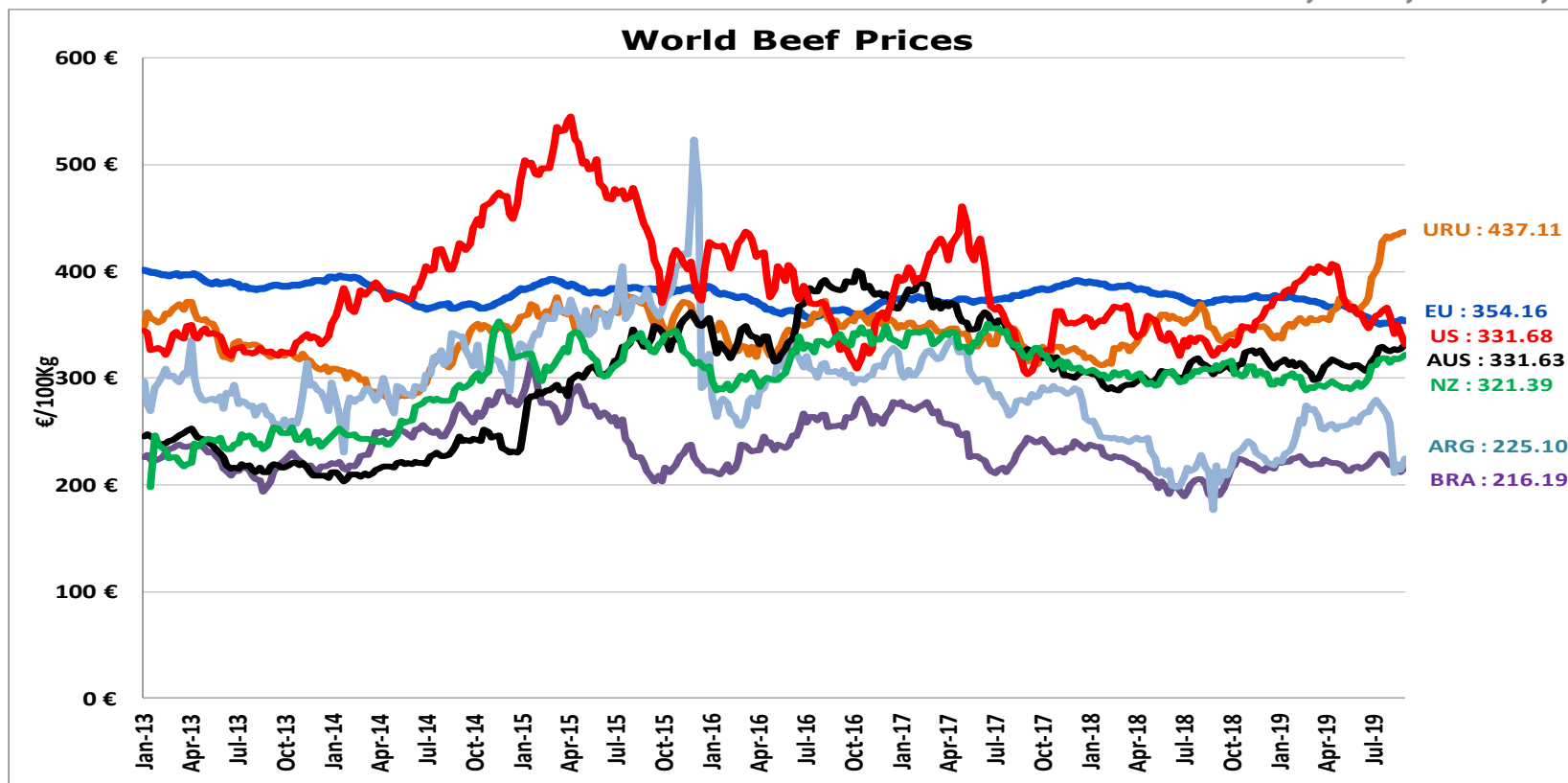
## Main Exporters of BEEF Products (up to July).

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



# 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](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](http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html)

*THANK YOU VERY MUCH*

*More Information at:*

*EU Market Observatory*

*[https://ec.europa.eu/agriculture/market-observatory/meat\\_en](https://ec.europa.eu/agriculture/market-observatory/meat_en)*

*And*

*Agri-FOOD data portal:*

*<http://agridata.ec.europa.eu/>*