



BEEF & VEAL MARKET SITUATION



CIVIL DIALOGUE GROUP
26 November 2024

LIVESTOCK

JUNE SURVEY

EU EVOLUTION TOTAL BOVINE

May/Jun 1000 Hd	TOT LIVESTOCK				%Var 2024 2023	BOVINE < 1 Year				%Var 2024 2023	BOVINE 1-2 Year				%Var 2024 2023	BOVINE > 2 Year				%Var 2024 2023
	2021	2022	2023	2024		2021	2022	2023	2024		2021	2022	2023	2024		2021	2022	2023	2024	
BE	2 353	2 241	2 281	2 235	-2.0%	712	656	677	662	-2.2%	473	463	456	446	-2.1%	1 169	1 121	1 148	1 126	-1.9%
BG																				
CZ																				
DK	1 503	1 484	1 454	1 423	-2.1%	517	510	498	490	-1.6%	287	290	281	273	-3.2%	699	684	674	661	-2.0%
DE	11 176	10 986	10 937	10 627	-2.8%	3 398	3 296	3 260	3 153	-3.3%	2 591	2 620	2 595	2 496	-3.8%	5 188	5 071	5 082	4 978	-2.0%
EE																				
IE	7 359	7 396	7 341	7 183	-2.2%	2 146	2 134	2 074	2 026	-2.3%	1 910	1 949	1 922	1 859	-3.3%	3 303	3 313	3 346	3 298	-1.4%
EL																				
ES	6 923	6 754	6 565	6 379	-2.8%	2 634	2 569	2 427	2 321	-4.4%	973	902	928	910	-1.9%	3 316	3 283	3 211	3 148	-2.0%
FR	17 863	17 416	17 039	16 794	-1.4%	5 134	4 949	4 838	4 736	-2.1%	3 158	3 144	3 077	3 041	-1.2%	9 571	9 323	9 125	9 017	-1.2%
HR																				
IT	6 174	6 087	5 975	5 892	-1.4%	1 762	1 725	1 663	1 645	-1.1%	1 476	1 475	1 439	1 376	-4.4%	2 936	2 887	2 873	2 871	-0.1%
CY																				
LV																				
LT																				
LU																				
HU																				
MT																				
NL	3 732	3 766	3 752	3 695	-1.5%	1 523	1 546	1 507	1 486	-1.4%	479	493	507	502	-0.9%	1 729	1 726	1 738	1 708	-1.7%
AT	1 846	1 842	1 826	1 804	-1.2%	596	592	574	566	-1.4%	413	422	426	415	-2.4%	838	828	826	823	-0.5%
PL	6 401	6 444	6 360	6 336	-0.4%	1 789	1 916	1 855	1 882	+1.4%	1 856	1 674	1 670	1 641	-1.8%	2 756	2 855	2 834	2 813	-0.7%
PT	1 723	1 680	1 608	1 534	-4.6%	550	554	511	487	-4.5%	252	229	229	221	-3.6%	922	897	868	825	-4.9%
RO	1 864	1 852	1 833	1 833	idem	386	379	370	358	-3.2%	207	220	224	221	-1.2%	1 271	1 254	1 239	1 254	+1.2%
SI																				
SK																				
FI																				
SE	1 453	1 449	1 444	1 410	-2.4%	465	458	458	444	-3.2%	369	374	371	368	-0.8%	619	617	615	598	-2.7%
EU	70 371	69 398	68 415	67 144	-1.9%	21 612	21 285	20 713	20 256	-2.2%	14 444	14 255	14 124	13 768	-2.5%	34 315	33 858	33 578	33 121	-1.4%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2023 AND 2024

21 November 2024

LIVESTOCK

JUNE SURVEY

EU EVOLUTION TOTAL BOVINE

May/Jun 1000 Hd	TOTAL COWS				%Var 2024 2023	DAIRY COWS				%Var 2024 2023	OTHER COWS				%Var 2024 2023
	2021	2022	2023	2024		2021	2022	2023	2024		2021	2022	2023	2024	
BE	937	902	918	900	-2.0%	539	527	541	534	-1.3%	399	375	377	366	-2.9%
BG															
CZ															
DK	647	634	625	614	-1.8%	565	557	553	547	-1.2%	82	77	72	67	-6.1%
DE	4 517	4 430	4 399	4 297	-2.3%	3 892	3 817	3 775	3 668	-2.8%	626	612	623	628	+0.8%
EE															
IE	2 545	2 541	2 519	2 449	-2.8%	1 605	1 627	1 647	1 624	-1.4%	940	913	872	825	-5.4%
EL															
ES	2 987	2 951	2 897	2 842	-1.9%	828	816	794	780	-1.7%	2 159	2 135	2 102	2 062	-1.9%
FR	7 315	7 159	6 960	6 845	-1.7%	3 331	3 266	3 167	3 103	-2.0%	3 984	3 893	3 793	3 742	-1.3%
HR															
IT	2 161	2 130	2 123	2 267	+6.8%	1 852	1 821	1 798	1 695	-5.7%	309	309	325	572	+76.0%
CY															
LV															
LT															
LU															
HU															
MT															
NL	1 627	1 623	1 629	1 596	-2.0%	1 571	1 571	1 577	1 545	-2.0%	56	53	52	51	-1.8%
AT	715	710	704	695	-1.3%	531	549	546	539	-1.2%	184	161	158	156	-1.4%
PL	2 388	2 208	2 338	2 336	-0.1%	2 113	2 072	2 192	2 190	-0.1%	276	136	145	146	+0.3%
PT	757	742	718	693	-3.6%	236	227	224	219	-2.4%	521	515	494	474	-4.1%
RO	1 148	1 135	1 111	1 122	+0.9%	1 133	1 119	1 091	1 093	+0.2%	15	16	20	29	+42.5%
SI															
SK															
FI															
SE	512	510	506	489	-3.3%	302	297	295	289	-1.9%	210	213	211	200	-5.2%
EU	28 256	27 674	27 446	27 144	-1.1%	18 497	18 266	18 201	17 826	-2.1%	9 760	9 409	9 245	9 318	+0.8%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2023 AND 2024

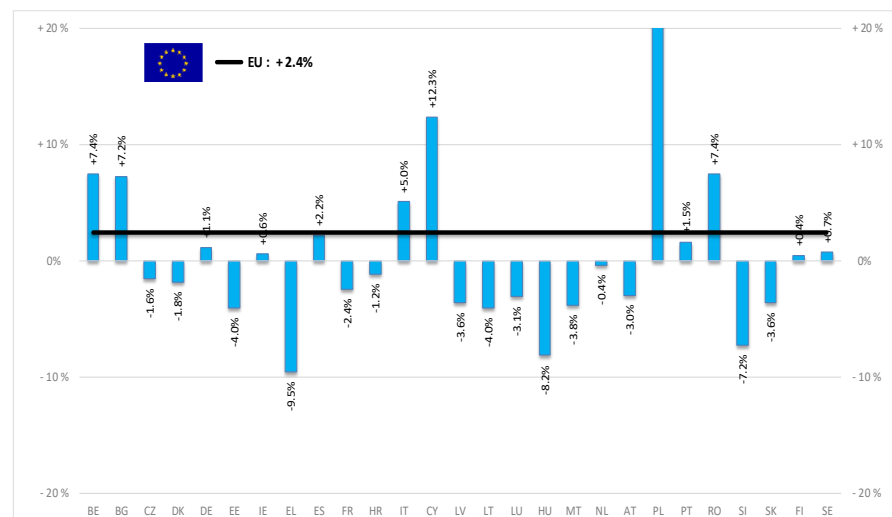
PRODUCTION

HEADS	Jan-Aug 24/23
EU	
Bull	+4.2%
Bullock	-0.7%
Cow	+2.5%
Heifer	+5.7%
Calve	+0.0%
Young cattle	-5.1%
Meat of bovine animals	+2.4%

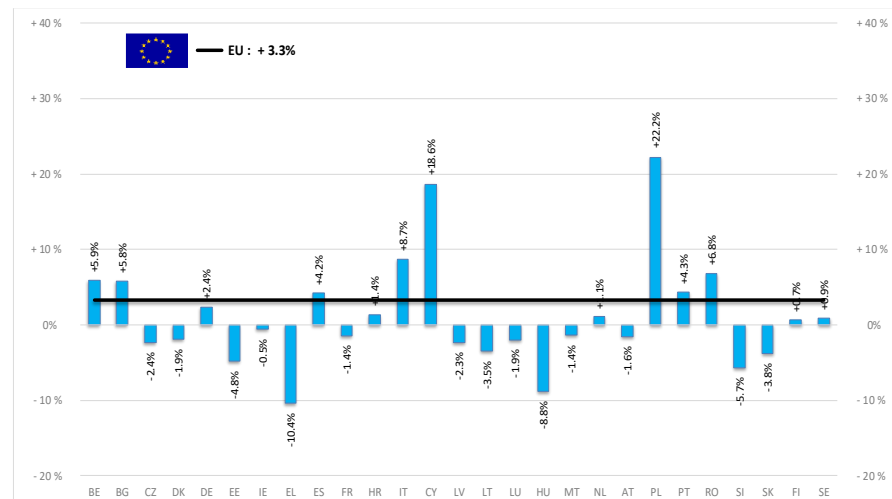
Estimates for last month of period :

TONNES	Jan-Aug 24/23
EU	
Bull	+4.5%
Bullock	-1.8%
Cow	+3.1%
Heifer	+6.1%
Calve	+1.2%
Young cattle	-4.1%
Meat of bovine animals	+3.3%

Estimates for last month of period :

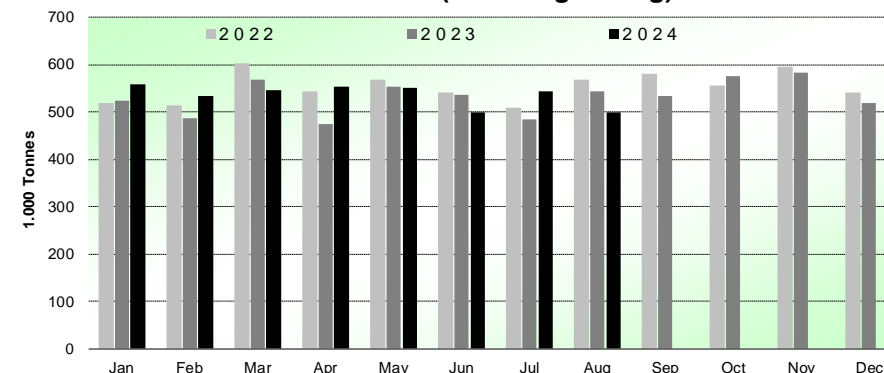


Source : EStat - Newcronos



Source : EStat - Newcronos

Beef & Veal Production (EU Slaughtering) - Tonnes

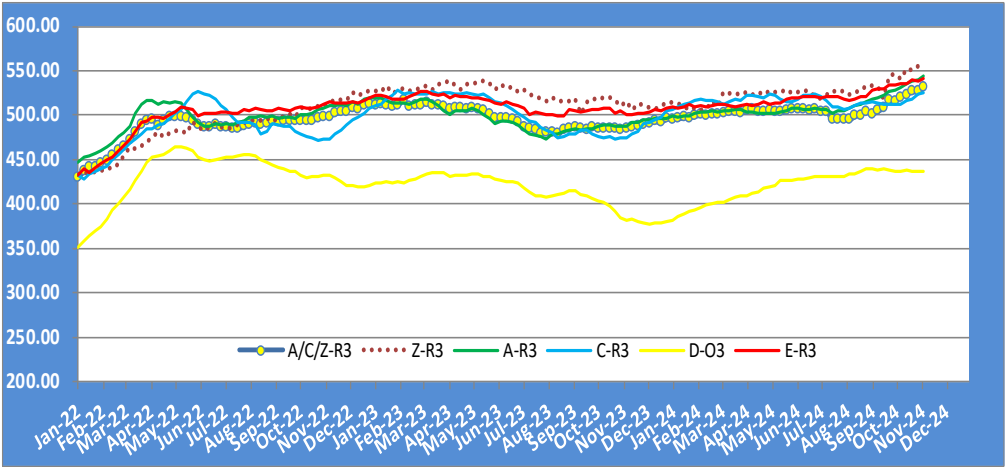
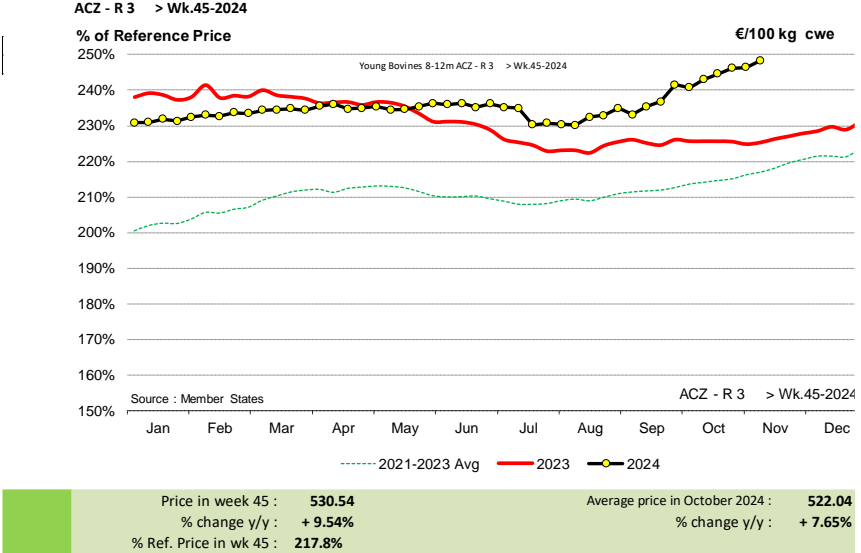


Source : EStat-Newcronos

PRICES

Carcasses

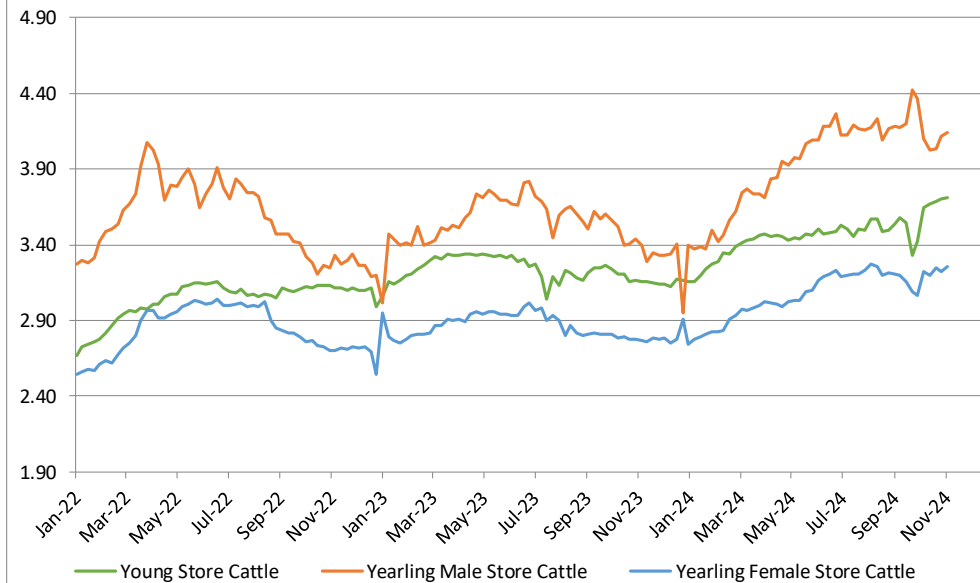
EU Prices week		45	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z-R3	530,5	+ 0,7%	+ 2,0%	+ 9,5%
	Young Bovines (Z)	506,6	+ 0,7%	+ 2,1%	+ 3,6%
	Young Bulls (A)	537,9	+ 0,7%	+ 1,9%	+ 11,0%
	Steers (C)	527,8	+ 0,9%	+ 2,5%	+ 11,0%
	Cows (D)	437,4	+ 0,2%	+ 0,1%	+ 14,7%
	Heifers (E)	541,9	+ 0,6%	+ 1,3%	+ 8,3%
Live Animals	Calves slaughtered <8M	645,9	- 0,0%	+ 2,2%	+ 6,6%
	Male Calves Dairy Type	132,6	+ 0,9%	+ 7,9%	+ 34,0%
	Male Calves Beef Type	280,1	+ 3,0%	+ 3,2%	+ 18,2%
	Young Store Cattle	3,71	+ 0,2%	+ 1,8%	+ 17,7%
	Yearling Male Store Cattle	4,14	+ 0,5%	+ 1,0%	+ 21,8%
	Yearling Female Store Cattle	3,26	+ 1,1%	+ 1,1%	+ 17,8%



PRICES

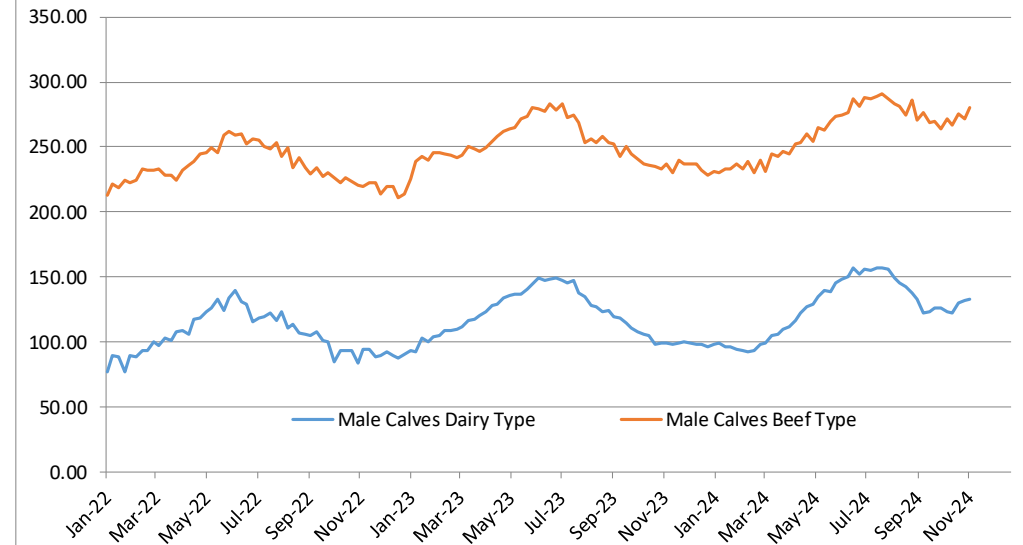
Live bovines

Young Store Cattle Prices



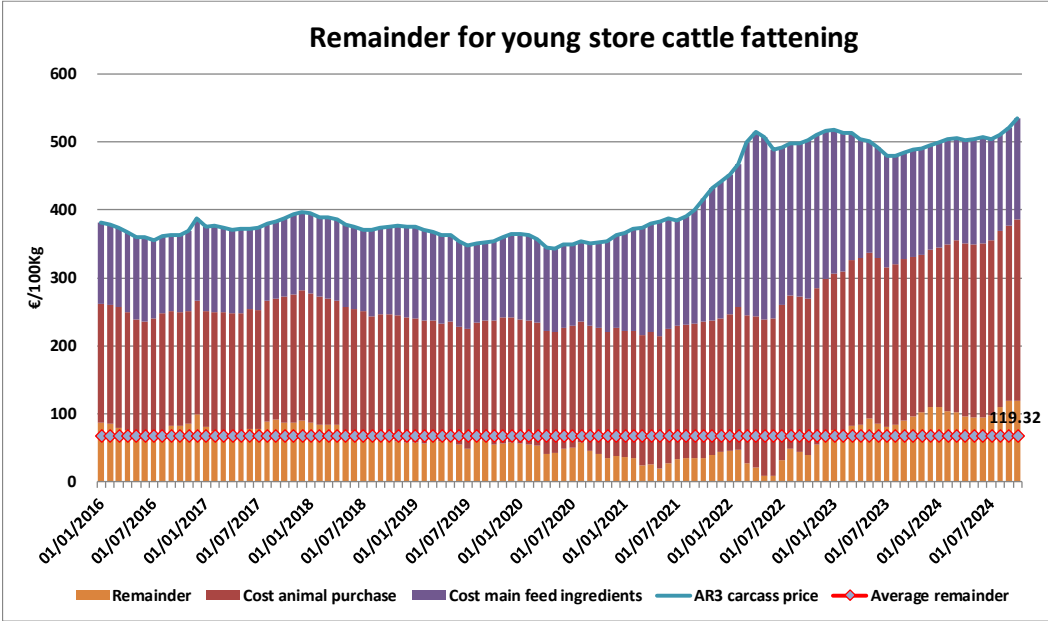
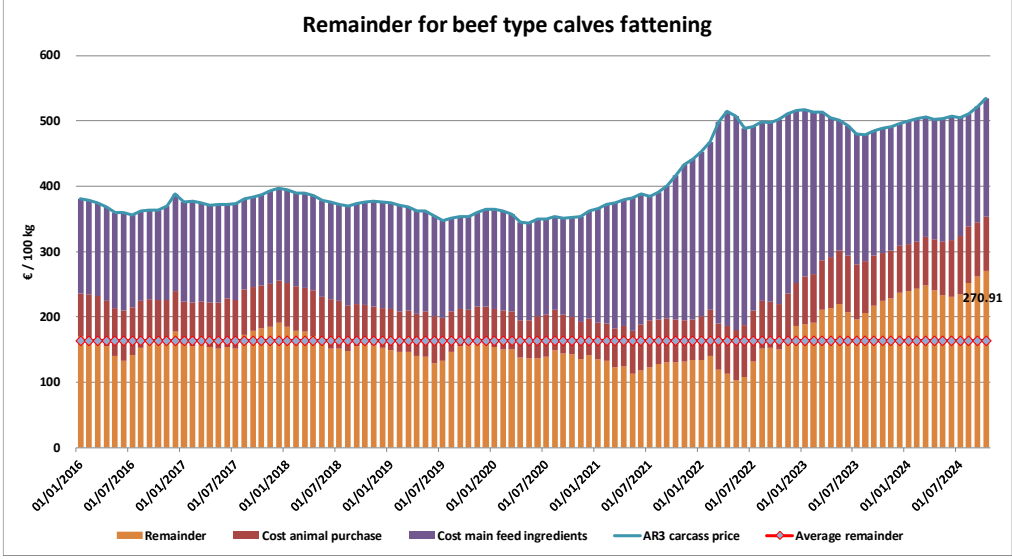
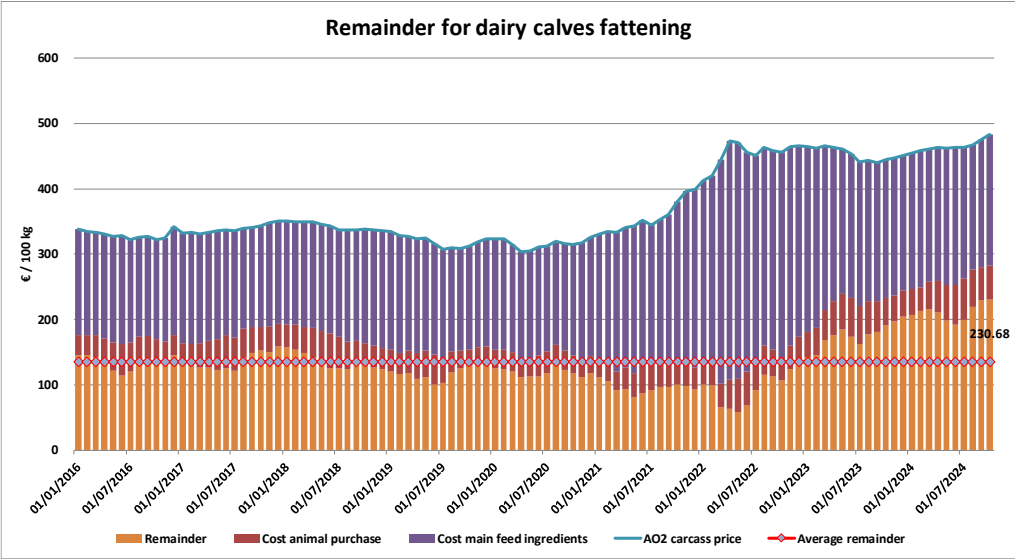
Young Store Cattle Price in	Week 45	3.71	Yearling Male Store Cattle Price	4.14
	Change y/y	+17.7%	Change y/y	+21.8%
Yearling Female Store Cattle Price		3.26		
	Change y/y	+17.8%		

Male Rearing Calves Prices



Male Rearing Calves Beef type			Male Rearing Calves Dairy type		
Price in	Week 45	280.18	Price in	Week 45	132.68
Change y/y		+18.2%	Change y/y		+34.0%

REMAINDERS



TRADE

EU EXPORTS

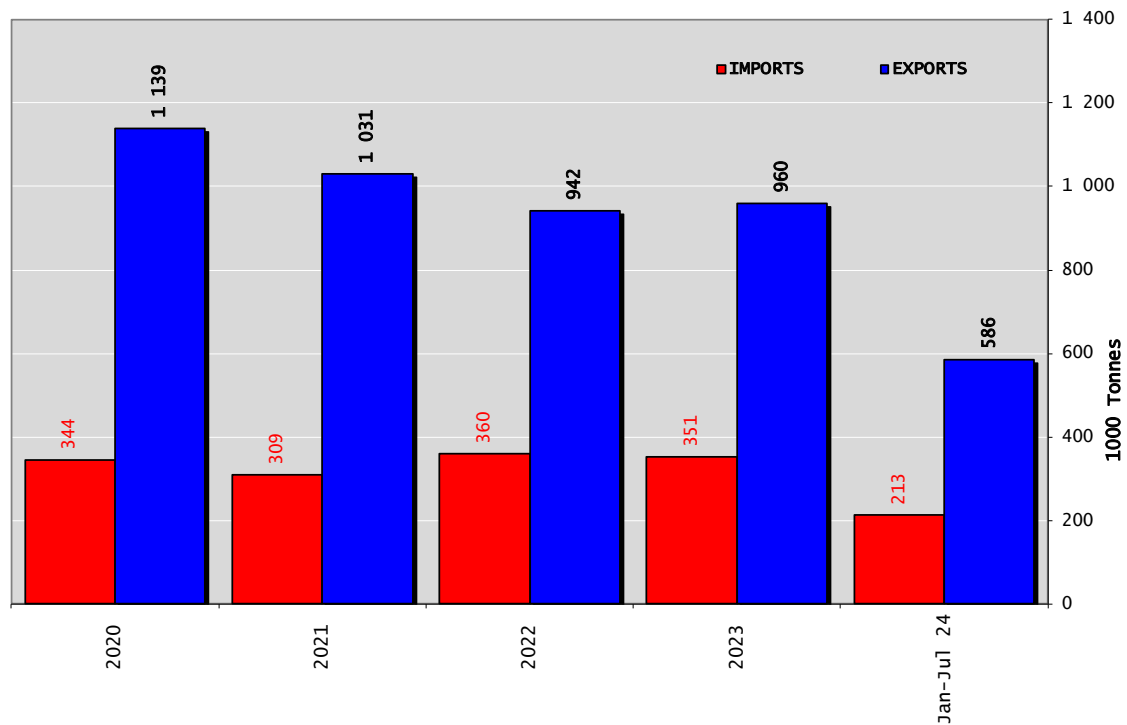
	2020		2021		2022		2023		Jan-Aug 24		Compared to Jan-Aug 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	450.514	39,5%	344.633	33,4%	366.332	38,9%	368.959	38,4%	229.254	34,6%	- 4,5%
Türkiye	22.338	2,0%	14.953	1,5%	14.168	1,5%	90.933	9,5%	78.823	11,9%	+ 33,8%
Bosnia-Herz.	34.896	3,1%	40.504	3,9%	38.796	4,1%	45.285	4,7%	27.825	4,2%	- 2,0%
Israel	56.139	4,9%	66.022	6,4%	63.618	6,7%	45.133	4,7%	26.146	3,9%	- 27,5%
Ghana	47.344	4,2%	47.618	4,6%	32.171	3,4%	33.889	3,5%	23.965	3,6%	+ 8,5%
Algeria	39.396	3,5%	24.111	2,3%	25.459	2,7%	11.905	1,2%	18.692	2,8%	+ 108,5%
Morocco	10.049	0,9%	11.868	1,2%	8.273	0,9%	25.612	2,7%	17.801	2,7%	+ 14,6%
Kosovo	10.391	0,9%	16.478	1,6%	17.069	1,8%	22.694	2,4%	17.588	2,7%	+ 31,6%
Ivory Coast	32.433	2,8%	29.187	2,8%	29.882	3,2%	30.205	3,1%	17.569	2,6%	- 8,3%
Sw itzerland	26.223	2,3%	28.717	2,8%	24.958	2,6%	19.371	2,0%	16.489	2,5%	+ 24,2%
Philippines	33.650	3,0%	34.671	3,4%	29.922	3,2%	18.333	1,9%	16.283	2,5%	+ 40,7%
Lebanon	33.709	3,0%	19.527	1,9%	21.026	2,2%	21.627	2,2%	14.317	2,2%	+ 13,9%
Hong Kong	56.713	5,0%	44.769	4,3%	10.570	1,1%	21.689	2,3%	13.108	2,0%	- 12,0%
Canada	20.450	1,8%	20.670	2,0%	19.928	2,1%	15.907	1,7%	10.934	1,6%	+ 9,6%
Japan	11.885	1,0%	21.888	2,1%	19.948	2,1%	12.677	1,3%	9.787	1,5%	+ 18,4%
North Macedonia	8.264	0,7%	12.935	1,3%	9.934	1,1%	9.975	1,0%	7.769	1,2%	+ 17,6%
Other Destinations	245.056	21,5%	252.427	24,5%	210.442	22,3%	167.034	17,4%	116.872	17,6%	
Total	1.139.450		1.030.978		942.496		961.229		663.222		
% change			- 10%		- 9%		+ 2%		+ 6,1%		

TRADE

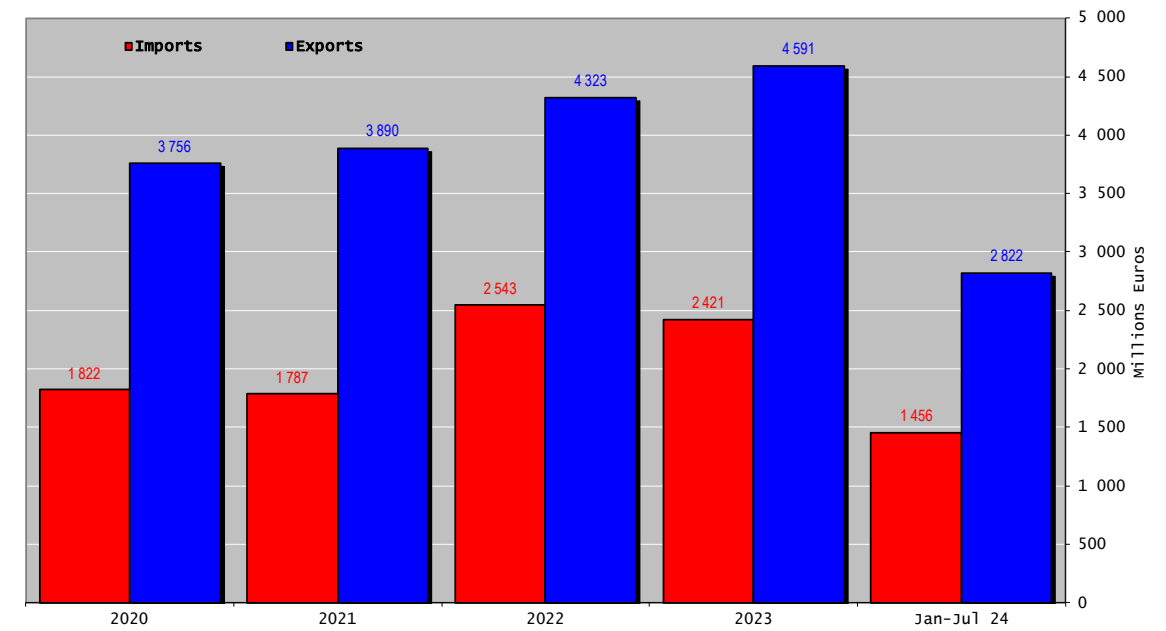
EU IMPORTS

	2020		2021		2022		2023		Jan-Aug 24		Compared to Jan-Aug 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	120.743	35,1%	87.596	28,3%	118.767	33,0%	107.130	30,5%	69.919	29,2%	+ 1,3%
Brazil	84.139	24,4%	81.737	26,4%	86.512	24,0%	86.862	24,7%	55.251	23,1%	- 14,1%
Argentina	56.421	16,4%	52.300	16,9%	62.584	17,4%	63.094	18,0%	43.494	18,2%	+ 0,9%
Uruguay	34.611	10,0%	42.669	13,8%	37.619	10,5%	41.544	11,8%	30.230	12,6%	+ 5,0%
USA	16.532	4,8%	14.910	4,8%	17.269	4,8%	18.275	5,2%	10.438	4,4%	- 13,2%
Namibia	1.445	0,4%	1.996	0,6%	5.168	1,4%	7.853	2,2%	8.091	3,4%	+ 80,1%
Australia	11.058	3,2%	8.925	2,9%	8.385	2,3%	7.700	2,2%	6.177	2,6%	+ 15,8%
New Zealand	6.116	1,8%	4.380	1,4%	5.202	1,4%	4.532	1,3%	3.879	1,6%	+ 26,1%
Botswana	788	0,2%	331	0,1%	928	0,3%	1.606	0,5%	3.685	1,5%	+++
Paraguay	4.234	1,2%	3.933	1,3%	5.404	1,5%	4.774	1,4%	3.293	1,4%	- 9,3%
Switzerland	4.187	1,2%	4.714	1,5%	4.730	1,3%	3.627	1,0%	2.266	0,9%	+ 5,9%
Canada	1.550	0,5%	1.816	0,6%	2.172	0,6%	1.456	0,4%	652	0,3%	- 37,8%
Japan	789	0,2%	1.478	0,5%	2.143	0,6%	834	0,2%	631	0,3%	+ 8,4%
Serbia	931	0,3%	963	0,3%	1.058	0,3%	812	0,2%	407	0,2%	- 34,7%
Norway	335	0,1%	571	0,2%	704	0,2%	637	0,2%	322	0,1%	- 27,0%
Chile	168	0,0%	238	0,1%	378	0,1%	365	0,1%	256	0,1%	- 3,5%
Other Destinations	357	0,1%	710	0,2%	961	0,3%	322	0,1%	237	0,1%	
Total	344.403		309.267		359.985		351.423		239.228		
% change			- 10%		+ 16%		- 2%		- 0,2%		

TRADE

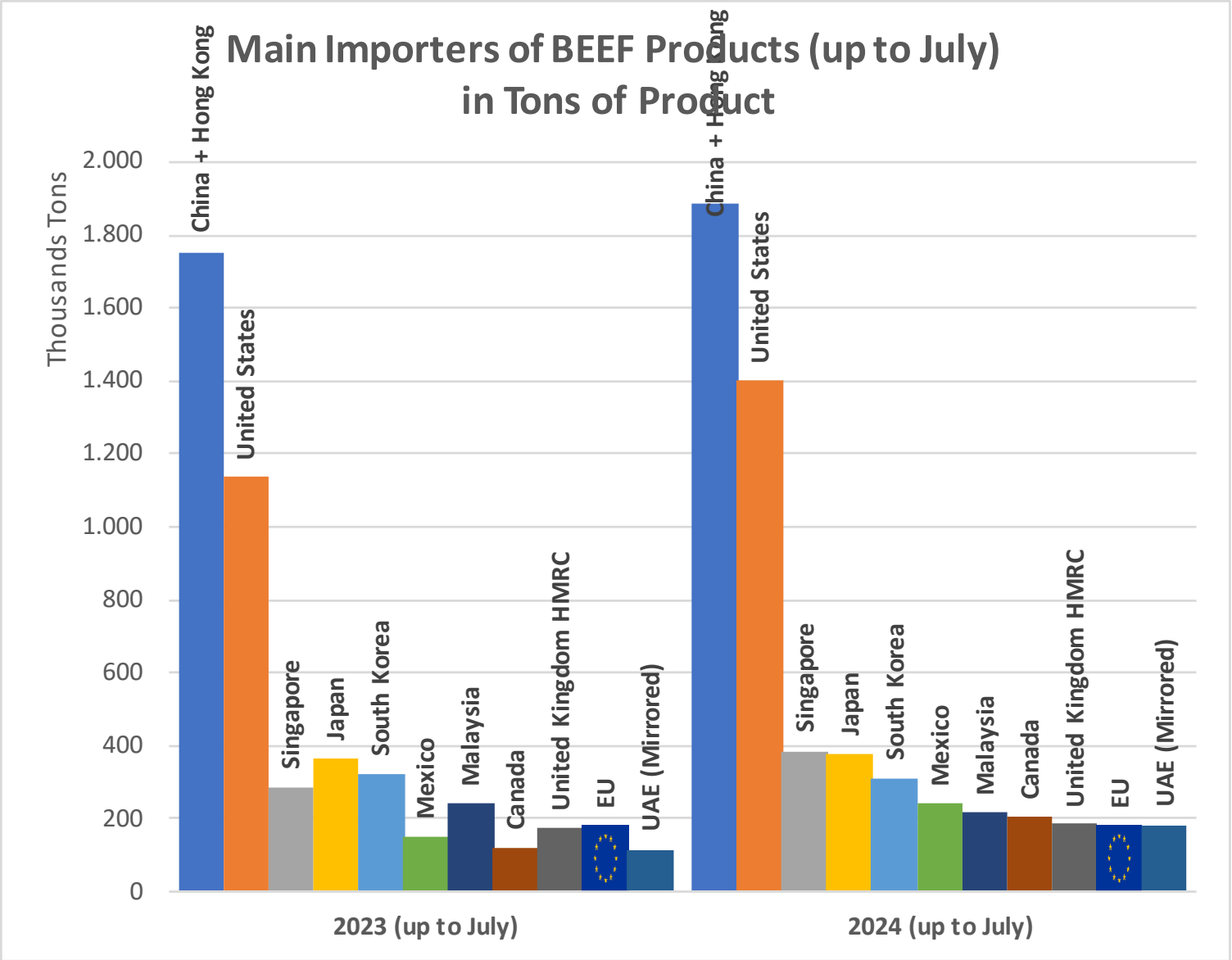


EU Trade balance



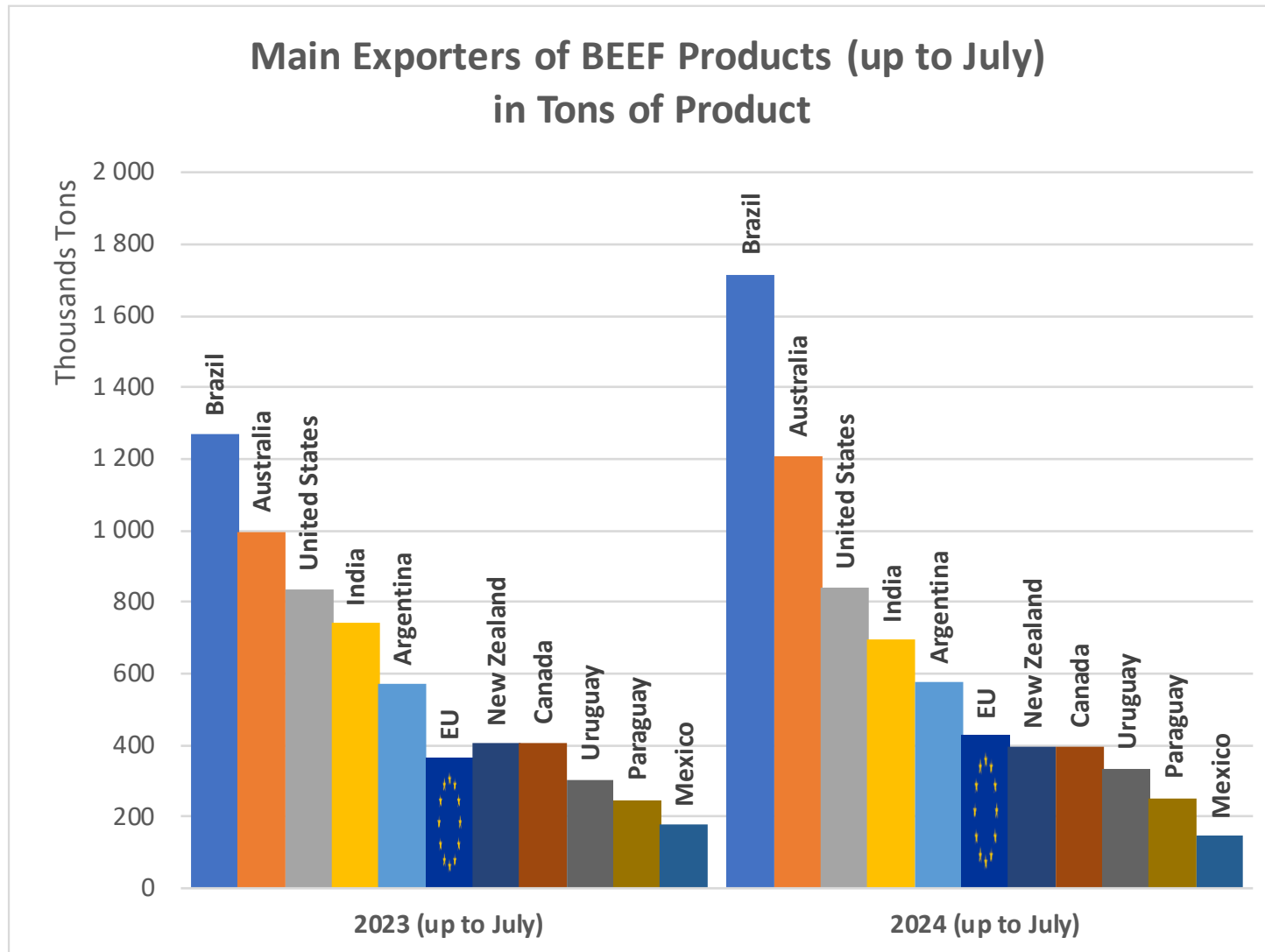
WORLD BEEF MARKET

Main importers



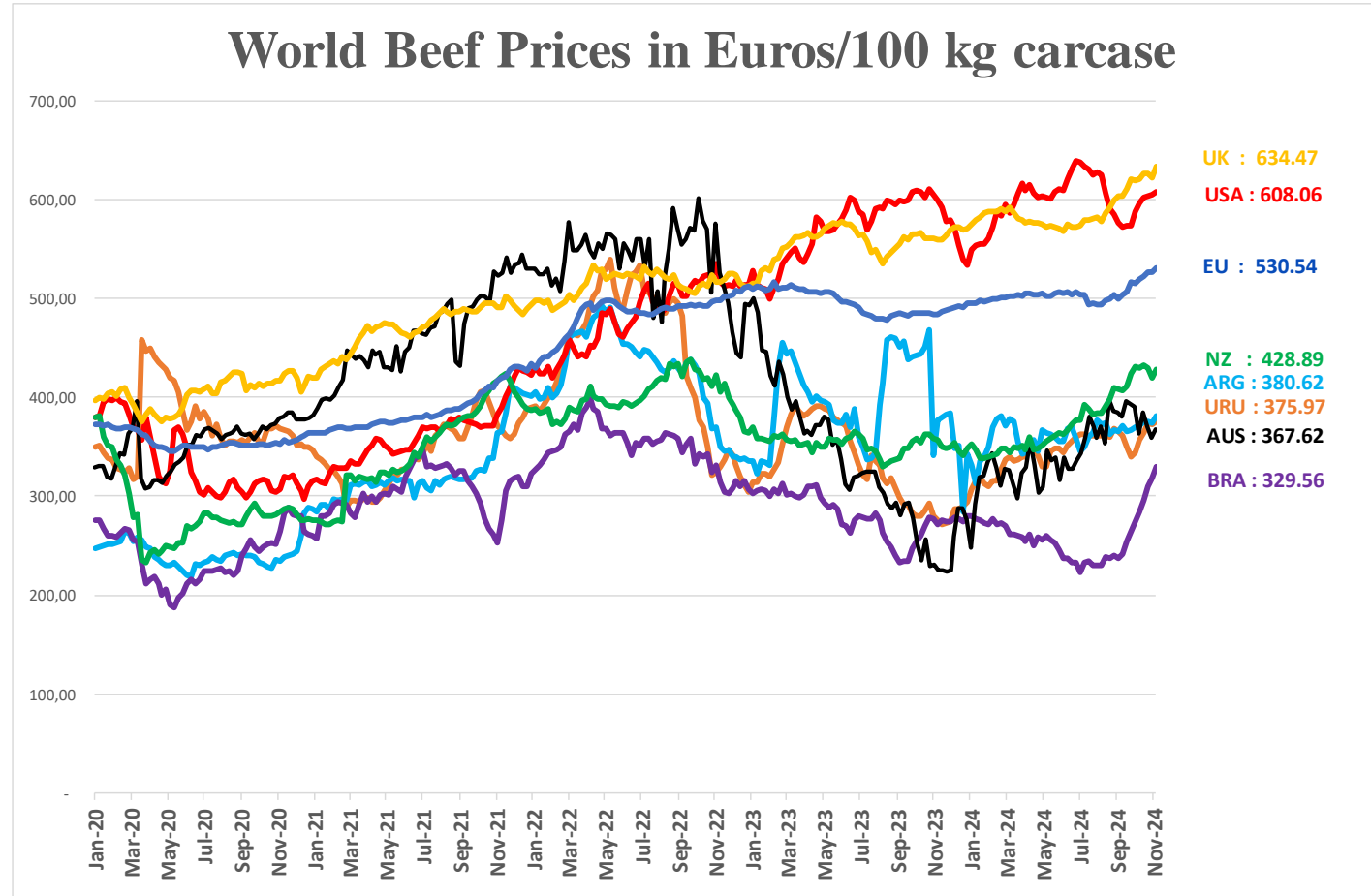
WORLD BEEF MARKET

Main exporters



WORLD BEEF MARKET

Prices



USA, AUS, URU, ARG, NZ, BRA [World Beef Report](#)
GB <https://ahdb.org.uk/beef/gb-deadweight-cattle-prices-by-region>
EU [Member States Communications](#)

26 November 2024

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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