



European Meat Market Observatory

Beef and Veal market

21 June 2021

PRODUCTION

% EVOLUTION

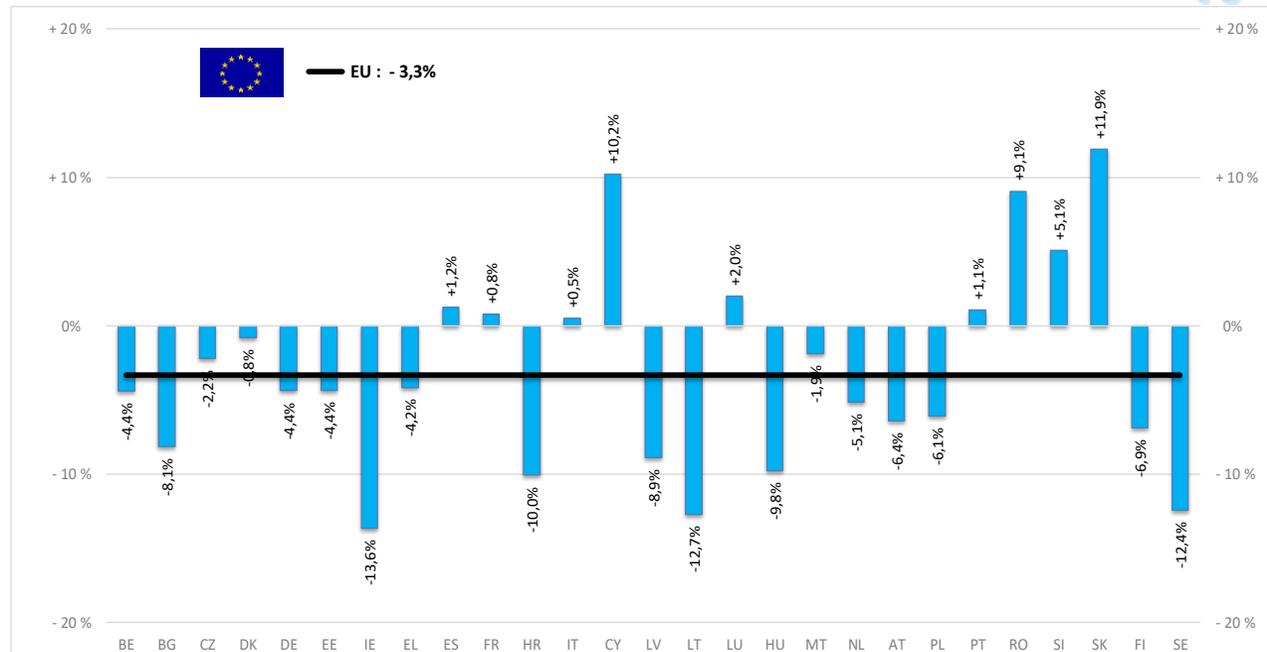
Market Situation: Beef & Veal

HEADS	Jan-Mar 21/20
EU	-3,3%
Bull	-4,1%
Bullock	-6,0%
Cow	-2,1%
Heifer	-3,4%
Calve	-3,7%
Young cattle	-2,4%
Meat of bovine animals	-3,3%

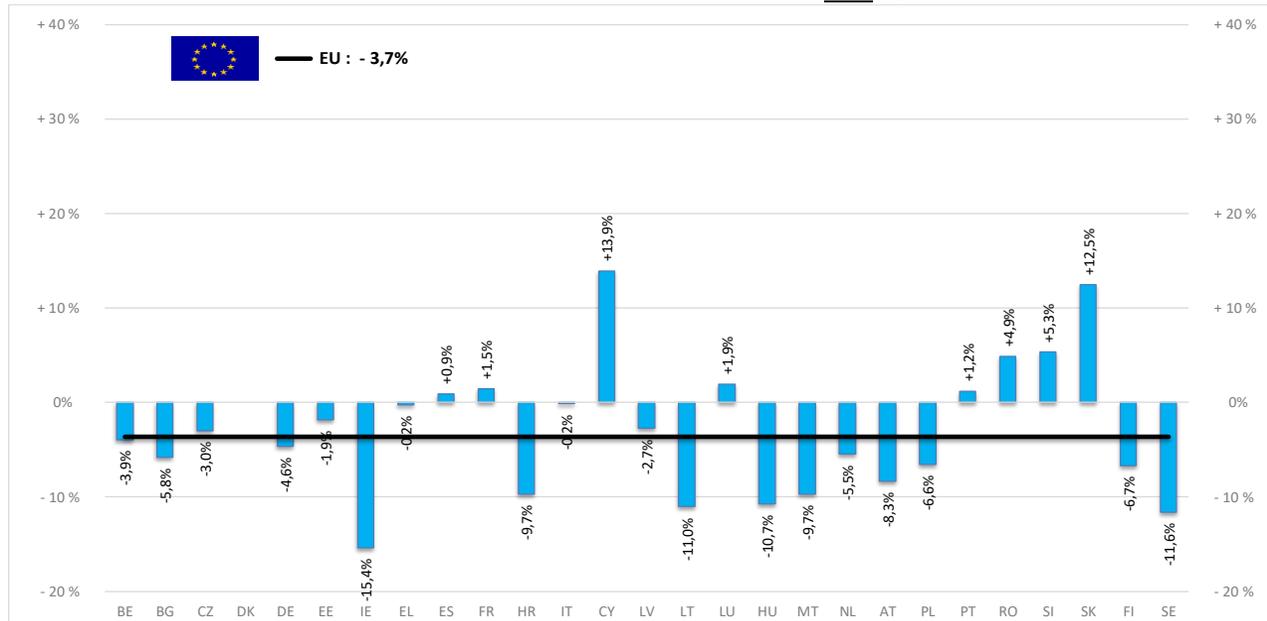
Estimates for last month of period :

TONNES	Jan-Mar 21/20
EU	-3,7%
Bull	-5,3%
Bullock	-6,5%
Cow	-2,8%
Heifer	-2,3%
Calve	-1,4%
Young cattle	-3,9%
Meat of bovine animals	-3,7%

Estimates for last month of period :

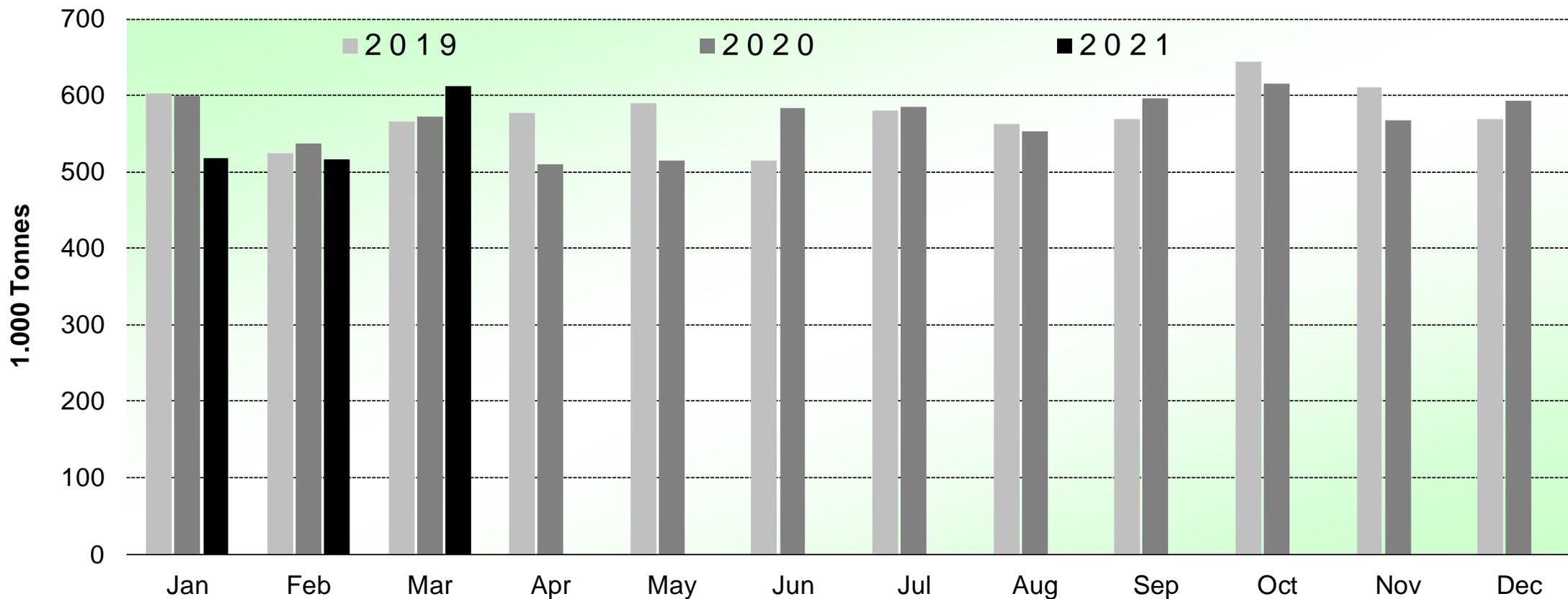


Source : EStat - Newcronos



Source : EStat - Newcronos

Beef & Veal Production (EU Slaughtering) - Tonnes



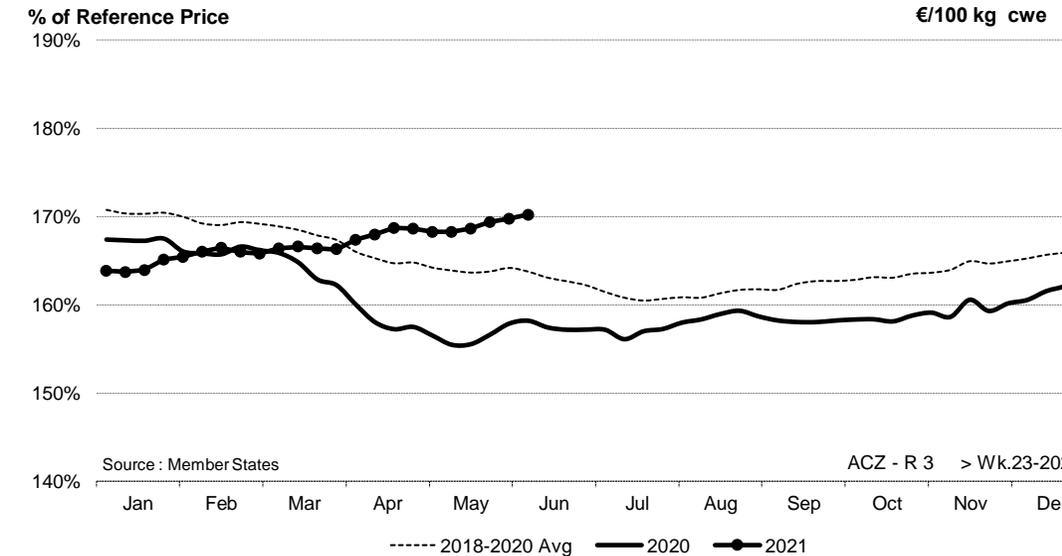
Source: EStat-Newcronos

PRICES CARCASSES

EU Prices week		23	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	378,6	+ 0,3%	+ 1,2%	+ 7,6%
	Young Bovines (Z)	366,2	+ 0,2%	- 0,0%	+ 0,2%
	Young Bulls (A)	376,5	+ 0,3%	+ 1,6%	+ 7,4%
	Steers (C)	412,7	+ 0,3%	+ 1,2%	+ 13,1%
	Cows (D)	316,5	+ 1,6%	+ 4,3%	+ 17,6%
	Heifers (E)	392,3	+ 1,1%	+ 2,1%	+ 8,4%
Live Animals	Male Calves Dairy Type	108,2	+ 4,4%	+ 17,0%	+ 43,3%
	Male Calves Beef Type	231,5	+ 4,0%	+ 8,9%	+ 17,2%
	Young Store Cattle	2,62	+ 0,3%	+ 0,3%	+ 7,8%
	Yearling Male Store Cattle	2,32	+ 0,6%	- 1,1%	+ 0,5%
	Yearling Female Store Cattle	2,50	+ 0,5%	+ 0,0%	+ 6,0%
	Calves slaughtered <8M	475,0	+ 0,7%	+ 0,1%	+ 16,8%

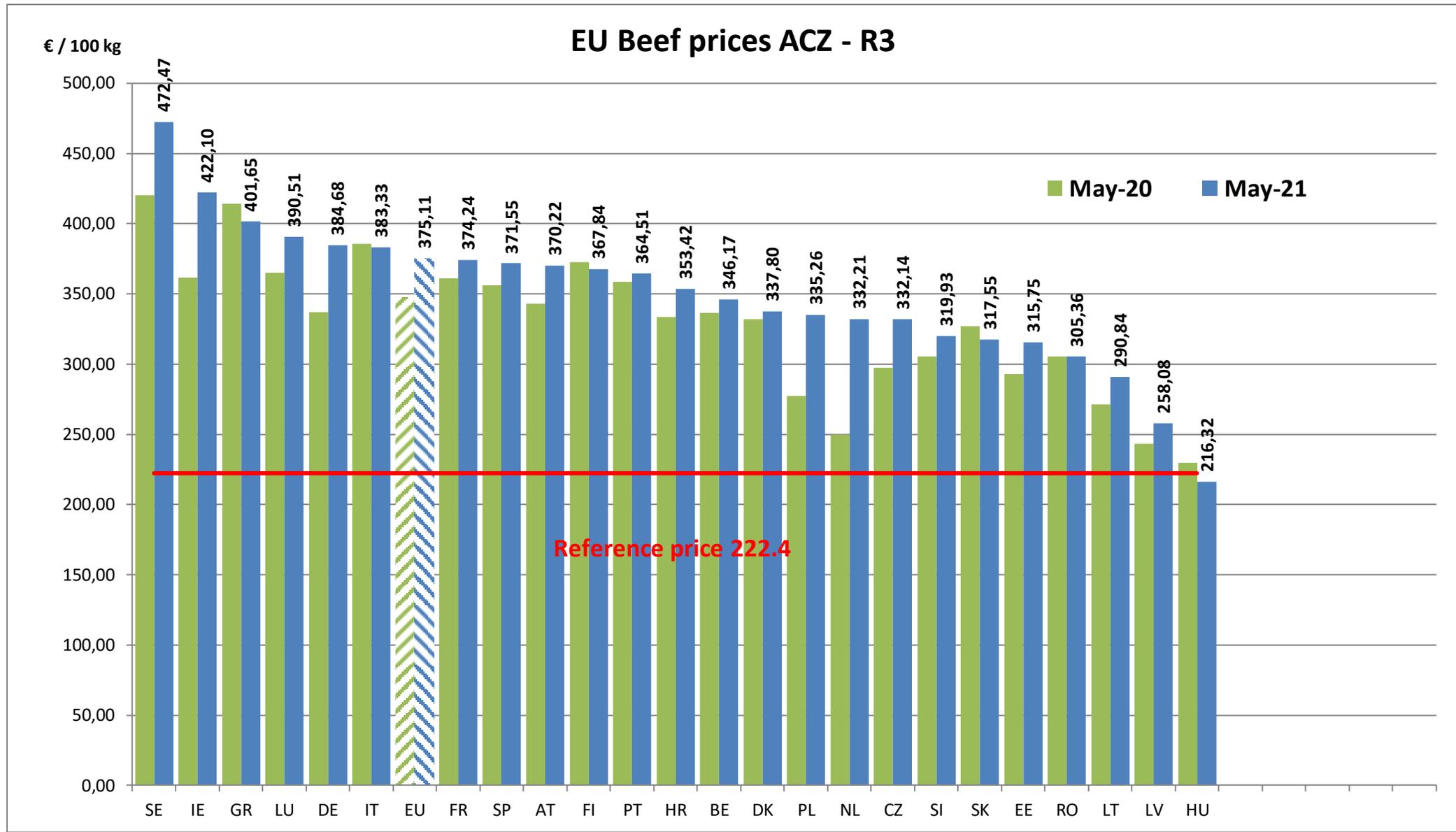
EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.23-2021

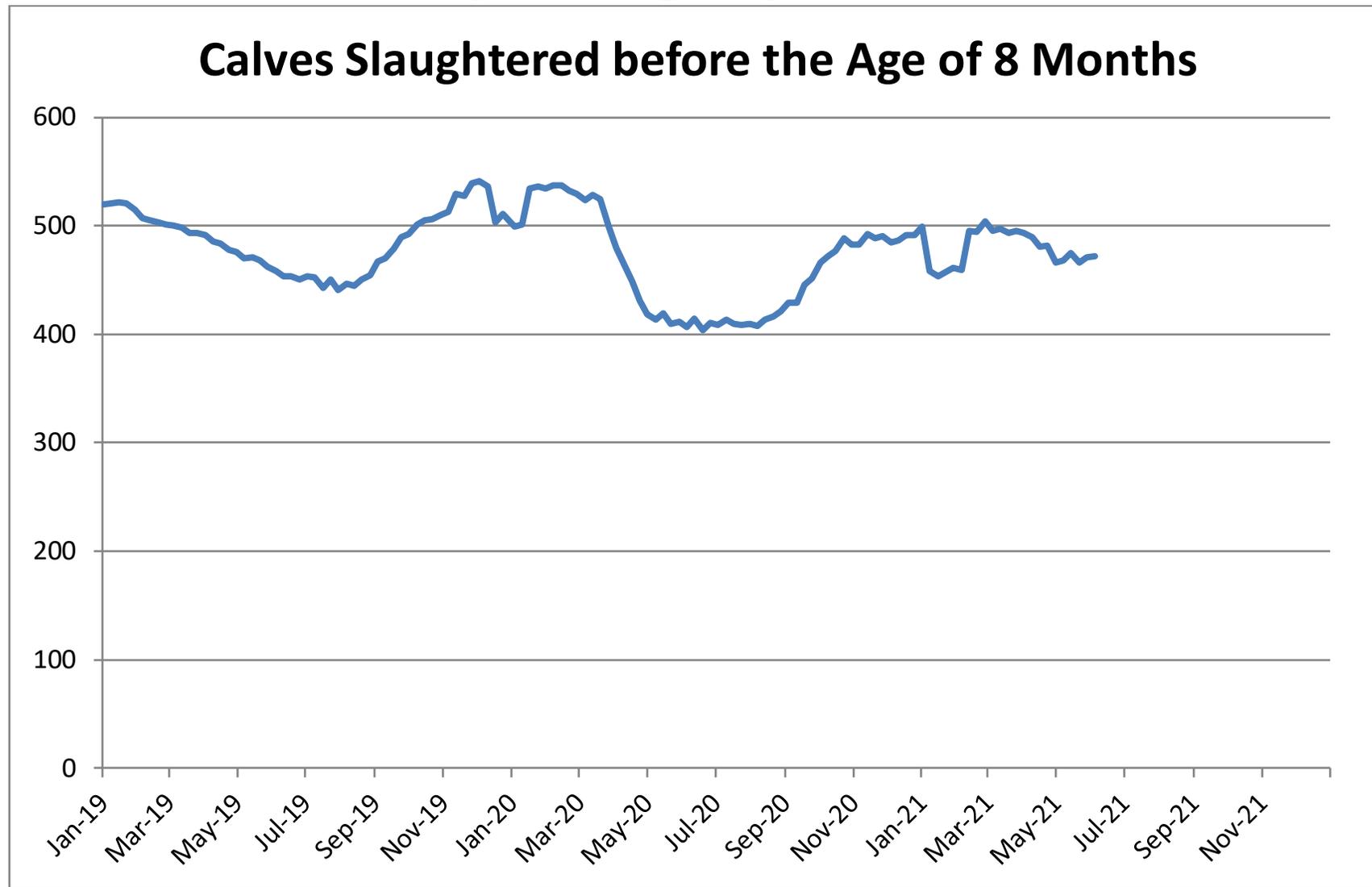


Price in week 23 : **378,61**
 % change y/y : **+ 7,61%**
 % Ref. Price in wk 23 : **170,2%**

Average price in May 2021 : **375,11**
 % change y/y : **+ 7,84%**



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



Price in Week 22 **471,83 € / 100 kg of carcasse weight**
 Change y/y +14,74%

Market transparency: Commission Implementing Regulation (EU) 2017/1185

WHO AND WHAT

Weekly notifications - Annex I

Requirements relating to weekly price notifications referred to in Article 11

6. Meat

Content of the notification: prices for beef, pig and sheep carcasses and **cuts** and certain live cattle, calves and piglets in accordance with Regulation (EU) No 1308/2013 and for carcasses according to the classification of beef, pig and sheep carcasses expressed per 100 kg of product.

Member States concerned: for carcasses and live animals, all Member States. **For cuts, Member States whose national production represents 2% or more of Union production.**

Other: where in the opinion of the competent authority of the Member State concerned there are insufficient numbers of carcasses or live animals to notify, the Member State concerned may decide for the period in question to suspend the recording of prices for such carcasses or live animals and shall notify the Commission of the reason for its decision. Concerning cuts, Member States concerned shall report prices for **beef hindquarter, beef forequarter, beef minced meat**, pig meat loin, pig meat belly, pig meat shoulder, pig minced meat and pig meat ham.

Buying prices

Content of the notification: retailers' and other food business operators' representative buying prices for pig and **beef minced meat**, expressed per 100 kg of product.

Market transparency: Commission Implementing Regulation (EU) 2017/1185

WHO AND WHAT

Monthly notifications - Annex II

Requirements relating to non-weekly price notifications referred to in point (a) of Article 12

9. Meat

Content of the notification: representative selling prices of **organic beef carcasses** according to the classification of beef carcasses as in the case of the notification foreseen in point (a) of point 6 of Annex I, expressed per 100 kg of product.

Period of notification: by the 25th each month in respect of the preceding month.

Market transparency: Commission Implementing Regulation (EU) 2017/1185

WHO AND WHAT

Market information- Annex III

Requirements relating to production and market information notifications as referred to in point (b) of Article 12

11. Meat

Content of the notification:

(a) beef: number and weight of classified carcasses per category and broken down by classes of conformation and fat cover;

(b) pig: number and weight of classified carcasses per classes of lean meat content;

(c) beef: number and weight of classified organic carcasses per category and broken down by classes of conformation and fat cover.

Period of notification: weekly for points (a) and (b), together with the price notification foreseen in Annex I paragraph 6, point (a); monthly for point (c), together with the price notification foreseen in Annex II paragraph 9.

Member States concerned: **all Member States.**

Market transparency: Commission Implementing Regulation (EU) 2017/1185

	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	
Weekly selling prices																												
Beef cuts form 821			√		√							√									√	√						
Beef minced meat form 821					√																							
Weekly buying-in prices																												
Beef minced meat form 821					√																							√
Monthly prices																												
Organic beef carcasses	√				√					√						√								√				√
Market information																												
Beef weekly production		√	√		√	√	√		√	√	√	√	√	√	√	√	√			√	√	√	√	√	√	√	√	√

Legend		Reporting obligation
	√	Notifying
	√	Voluntary notification

EU Exports of Beef and Live Animals (COMEXT – tonnes cwe)

Destinations	2017		2018		2019		2020		Jan-Apr 21		Compared to
	tonnes	%									
Israel	44 196	6,1%	47 774	6,8%	49 629	7,1%	56 965	8,1%	18 883	8,0%	+ 40,4%
Hong Kong	76 086	10,4%	55 537	7,9%	46 748	6,7%	56 860	8,1%	17 197	7,3%	- 1,8%
Philippines	37 102	5,1%	28 766	4,1%	34 158	4,9%	39 920	5,7%	16 700	7,1%	+ 45,5%
Ghana	37 744	5,2%	36 766	5,2%	39 196	5,6%	47 408	6,7%	15 818	6,7%	- 0,9%
Algeria	26 305	3,6%	35 410	5,0%	57 152	8,2%	39 416	5,6%	13 027	5,5%	- 16,6%
Bosnia-Herz.	34 711	4,8%	38 762	5,5%	41 119	5,9%	35 758	5,1%	12 278	5,2%	+ 20,6%
Ivory Coast	36 038	4,9%	36 064	5,1%	33 396	4,8%	32 460	4,6%	10 700	4,5%	- 5,5%
Lebanon	38 322	5,3%	42 542	6,1%	36 393	5,2%	33 656	4,8%	9 765	4,1%	- 12,8%
Switzerland	26 708	3,7%	23 761	3,4%	25 188	3,6%	29 996	4,3%	9 657	4,1%	+ 13,7%
Norway	12 850	1,8%	7 925	1,1%	7 667	1,1%	12 936	1,8%	9 418	4,0%	+ 152,7%
Libya	27 848	3,8%	27 878	4,0%	24 541	3,5%	21 971	3,1%	7 437	3,1%	+ 0,9%
Saudi Arabia	4 691	0,6%	2 521	0,4%	2 809	0,4%	9 707	1,4%	5 462	2,3%	+ 25,9%
Ukraine	7 331	1,0%	10 465	1,5%	13 836	2,0%	15 857	2,3%	5 317	2,2%	+ 10,0%
Kosovo	6 377	0,9%	6 693	1,0%	10 279	1,5%	10 912	1,5%	5 137	2,2%	+ 62,0%
Turkey	96 413	13,2%	96 052	13,7%	34 555	4,9%	22 137	3,1%	5 128	2,2%	+ 11,1%
Canada	4 617	0,6%	2 225	0,3%	6 806	1,0%	20 475	2,9%	4 943	2,1%	- 13,4%
<i>Other Destinations</i>	<i>212 178</i>	<i>29,1%</i>	<i>203 099</i>	<i>28,9%</i>	<i>237 118</i>	<i>33,8%</i>	<i>218 226</i>	<i>31,0%</i>	<i>69 965</i>	<i>29,5%</i>	
Total (without UK)	729 519		702 242		700 590		704 659		236 832		
% change			- 4%		- 0%		+ 1%		+ 4,2%		

EU Exports of Beef

(COMEXT – tonnes cwe)

Destinations	2017		2018		2019		2020		Jan-Apr 21		Compared to
	tonnes	%									
Hong Kong	76 086	15,4%	55 537	11,9%	46 748	9,8%	56 860	11,6%	17 197	10,4%	- 1,8%
Philippines	37 102	7,5%	28 766	6,2%	34 158	7,2%	39 920	8,1%	16 700	10,1%	+ 45,5%
Ghana	37 744	7,7%	36 766	7,9%	39 196	8,2%	47 408	9,7%	15 818	9,6%	- 0,9%
Bosnia-Herz.	32 181	6,5%	36 152	7,7%	38 806	8,2%	33 459	6,8%	11 337	6,8%	+ 19,2%
Ivory Coast	36 028	7,3%	36 064	7,7%	33 396	7,0%	32 460	6,6%	10 700	6,5%	- 5,5%
Norway	12 849	2,6%	7 922	1,7%	7 667	1,6%	12 936	2,6%	9 418	5,7%	+++
Switzerland	25 570	5,2%	22 711	4,9%	24 110	5,1%	28 941	5,9%	9 098	5,5%	+ 13,1%
Israel	18 750	3,8%	22 163	4,7%	23 026	4,8%	21 967	4,5%	5 442	3,3%	- 5,8%
Ukraine	6 926	1,4%	9 887	2,1%	12 893	2,7%	14 861	3,0%	5 068	3,1%	+ 6,4%
Canada	2 424	0,5%	2 225	0,5%	6 806	1,4%	20 475	4,2%	4 943	3,0%	- 13,4%
Japan	4 281	0,9%	3 452	0,7%	8 007	1,7%	11 885	2,4%	4 689	2,8%	- 13,4%
USA	3 756	0,8%	5 458	1,2%	7 867	1,7%	12 310	2,5%	4 186	2,5%	+ 39,8%
North Macedonia	11 285	2,3%	10 002	2,1%	11 395	2,4%	10 551	2,1%	4 158	2,5%	+ 23,8%
South Africa	4 555	0,9%	7 214	1,5%	5 442	1,1%	7 743	1,6%	3 305	2,0%	+++
Vietnam	12 146	2,5%	8 163	1,7%	10 014	2,1%	6 367	1,3%	2 970	1,8%	+ 57,5%
Angola	10 982	2,2%	11 470	2,5%	8 410	1,8%	9 410	1,9%	2 480	1,5%	- 22,4%
<i>Other Destinations</i>	<i>160 448</i>	<i>32,5%</i>	<i>163 231</i>	<i>34,9%</i>	<i>157 699</i>	<i>33,2%</i>	<i>123 503</i>	<i>25,2%</i>	<i>38 072</i>	<i>23,0%</i>	
Total (without UK)	493 112		467 183		475 639		491 056		165 582		
% change			- 5%		+ 2%		+ 3%		+ 1,3%		

EU Imports of Beef and Live Animals (COMEXT – tonnes cwe)

Origins	2017		2018		2019		2020		Jan-Apr 21		Compared to
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	86 927	33,9%	103 979	37,3%	99 569	36,4%	84 172	37,6%	26 863	37,2%	- 7,3%
Uruguay	52 078	20,3%	47 922	17,2%	40 483	14,8%	34 595	15,4%	16 641	23,0%	+ 22,1%
Argentina	49 259	19,2%	61 400	22,0%	65 324	23,9%	56 421	25,2%	15 006	20,8%	- 20,1%
Australia	18 193	7,1%	17 368	6,2%	16 516	6,0%	11 058	4,9%	4 242	5,9%	- 22,8%
USA	21 624	8,4%	19 268	6,9%	16 852	6,2%	16 532	7,4%	3 834	5,3%	- 43,8%
Switzerland	5 105	2,0%	5 413	1,9%	4 401	1,6%	4 197	1,9%	1 655	2,3%	+ 17,7%
New Zealand	6 806	2,7%	7 165	2,6%	6 726	2,5%	6 145	2,7%	1 221	1,7%	- 45,8%
Paraguay	5 922	2,3%	5 520	2,0%	5 203	1,9%	4 234	1,9%	659	0,9%	- 47,7%
Canada	512	0,2%	1 343	0,5%	2 518	0,9%	1 550	0,7%	628	0,9%	+++
N.det.Extra	72	0,0%	127	0,0%	196	0,1%	94	0,0%	303	0,4%	+++
Japan	645	0,3%	791	0,3%	997	0,4%	789	0,4%	260	0,4%	+ 13,3%
Namibia	5 043	2,0%	3 442	1,2%	7 706	2,8%	1 445	0,6%	241	0,3%	- 22,9%
Serbia	565	0,2%	1 134	0,4%	1 062	0,4%	931	0,4%	186	0,3%	- 50,4%
South Africa	42	0,0%	0	0,0%	74	0,0%	70	0,0%	103	0,1%	+++
Norway	388	0,2%	153	0,1%	129	0,0%	336	0,2%	101	0,1%	+++
Botswana	2 686	1,0%	3 119	1,1%	4 950	1,8%	788	0,4%	59	0,1%	- 77,6%
<i>Other Destinations</i>	863	0,3%	700	0,3%	701	0,3%	585	0,3%	207	0,3%	
Total (without UK)	256 731		278 843		273 408		223 942		72 209		
% change			+ 9%		- 2%		- 18%		- 10,0%		

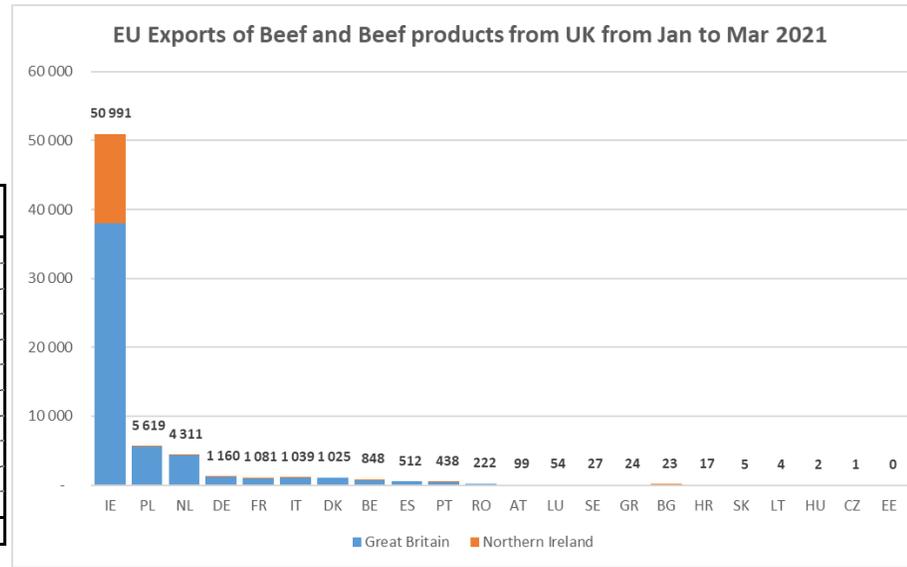
EU Exports/Import of Beef and Live Animals to/from UK in January-March 2021 (COMEXT)

EU Export of BEEF to UK by Products from Jan to Mar

In Tons of Carcase Weight

	2019			2020			2021			% 2021/2020	
	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU
Live Animals	2 656	50 854	5.2%	2 237	48 323	4.6%	2 437	53 458	4.6%	+8.9%	+10.6%
Meats	116 321	225 314	51.6%	100 724	226 414	44.5%	65 830	187 860	35.0%	-34.6%	-17.0%
Fresh	61 585	84 735	72.7%	57 761	83 086	69.5%	40 570	65 705	61.7%	-29.8%	-20.9%
Frozen	15 417	46 377	33.2%	11 743	56 024	21.0%	12 358	55 529	22.3%	+5.2%	-0.9%
Salted Meat	6 179	6 503	95.0%	6 557	7 029	93.3%	126	510	24.7%	-98.1%	-92.7%
Prepared	12 519	19 541	64.1%	12 257	20 324	60.3%	7 168	14 302	50.1%	-41.5%	-29.6%
Fresh Offals	6 317	6 913	91.4%	5 236	6 038	86.7%	1 339	1 932	69.3%	-74.4%	-68.0%
Frozen Offals	4 282	44 134	9.7%	3 539	45 777	7.7%	2 320	41 224	5.6%	-34.4%	-9.9%
Salted Offals	9 469	14 424	65.6%	3 360	5 907	56.9%	55	3 096	1.8%	-98.4%	-47.6%
Prepared Offal	166	194	85.4%	93	118	78.6%	69	95	72.2%	-26.2%	-19.6%
Fat	386	2 493	15.5%	177	2 110	8.4%	1 825	5 467	33.4%	+929.8%	+159.1%
Total Beef	118 977	276 167	43.1%	102 961	274 737	37.5%	68 267	241 318	28.3%	-33.7%	-12.2%

Source : Comext

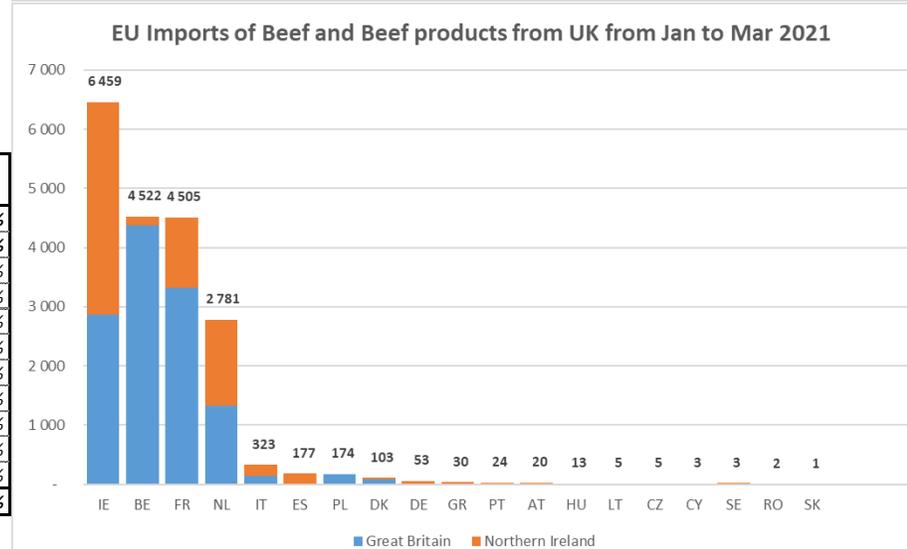


EU Import of BEEF from UK by Products from Jan to Mar

In Tons of Carcase Weight

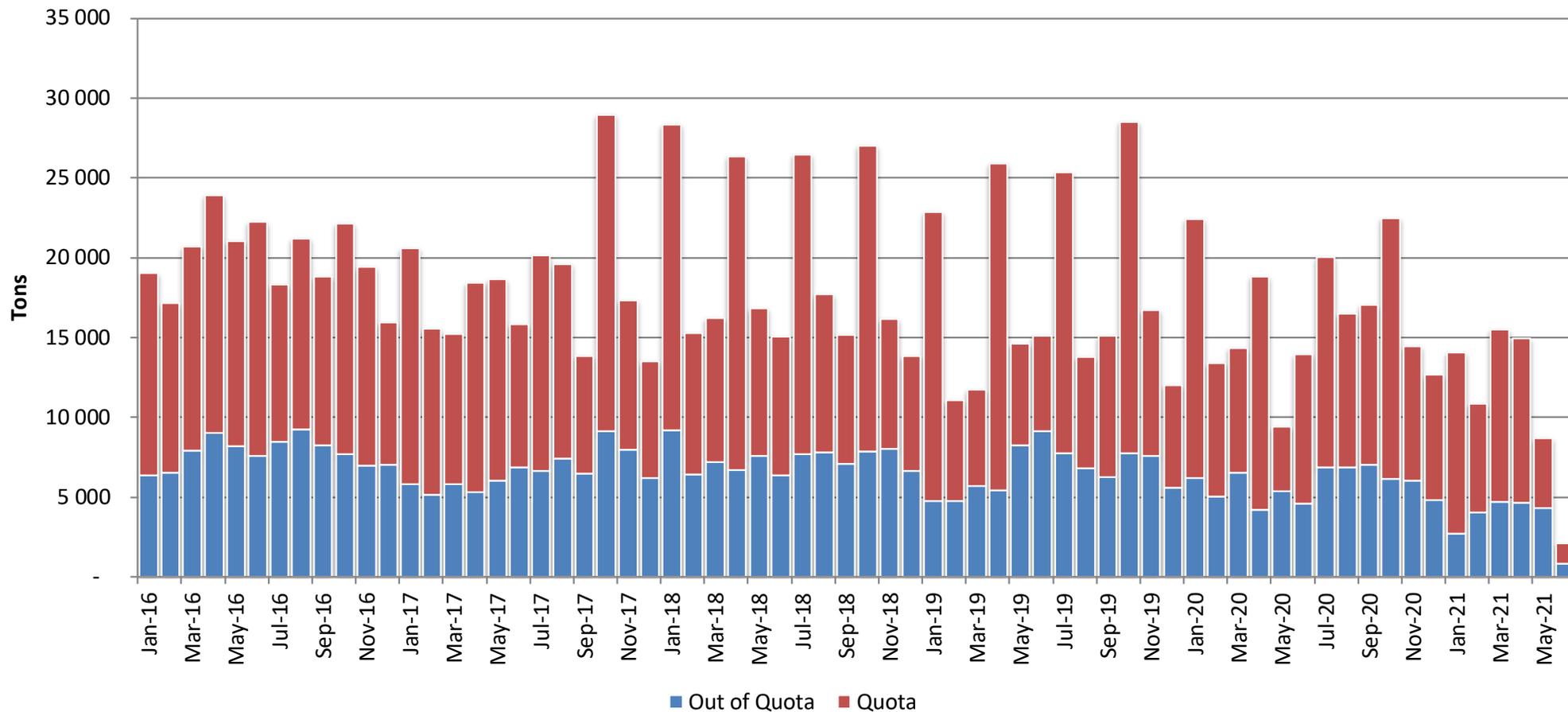
	2019			2020			2021			% 2021/2020	
	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU	%	United Kingdom	Extra-EU
Live Animals	673	719	93.6%	486	532	91.4%	189	233	81.1%	-61.2%	-56.3%
Meats	42 735	105 092	40.7%	33 629	90 982	37.0%	15 881	67 784	23.4%	-52.8%	-25.5%
Fresh	29 984	66 517	45.1%	21 756	55 108	39.5%	10 628	34 616	30.7%	-51.2%	-37.2%
Frozen	7 000	27 490	25.5%	5 816	23 453	24.8%	2 759	25 470	10.8%	-52.6%	+8.6%
Salted Meat	248	1 013	24.5%	226	983	23.0%	52	968	5.4%	-77.0%	-1.5%
Prepared	2 268	6 159	36.8%	2 368	7 397	32.0%	1 052	4 773	22.0%	-55.5%	-35.5%
Fresh Offals	1 043	1 398	74.6%	1 106	1 457	75.9%	1 083	1 374	78.8%	-2.1%	-5.7%
Frozen Offals	1 410	1 639	86.0%	1 542	1 757	87.8%	78	305	25.7%	-94.9%	-82.7%
Salted Offals	437	439	99.7%	403	404	99.7%	6	7	87.9%	-98.4%	-98.2%
Prepared Offal	40	40	100.0%	18	30	61.1%	1	3	26.6%	-95.0%	-88.4%
Fat	304	396	76.7%	394	394	100.0%	221	268	82.7%	-43.8%	-32.0%
Total Beef	43 408	105 811	41.0%	34 115	91 513	37.3%	16 069	68 016	23.6%	-52.9%	-25.7%

Source : Comext

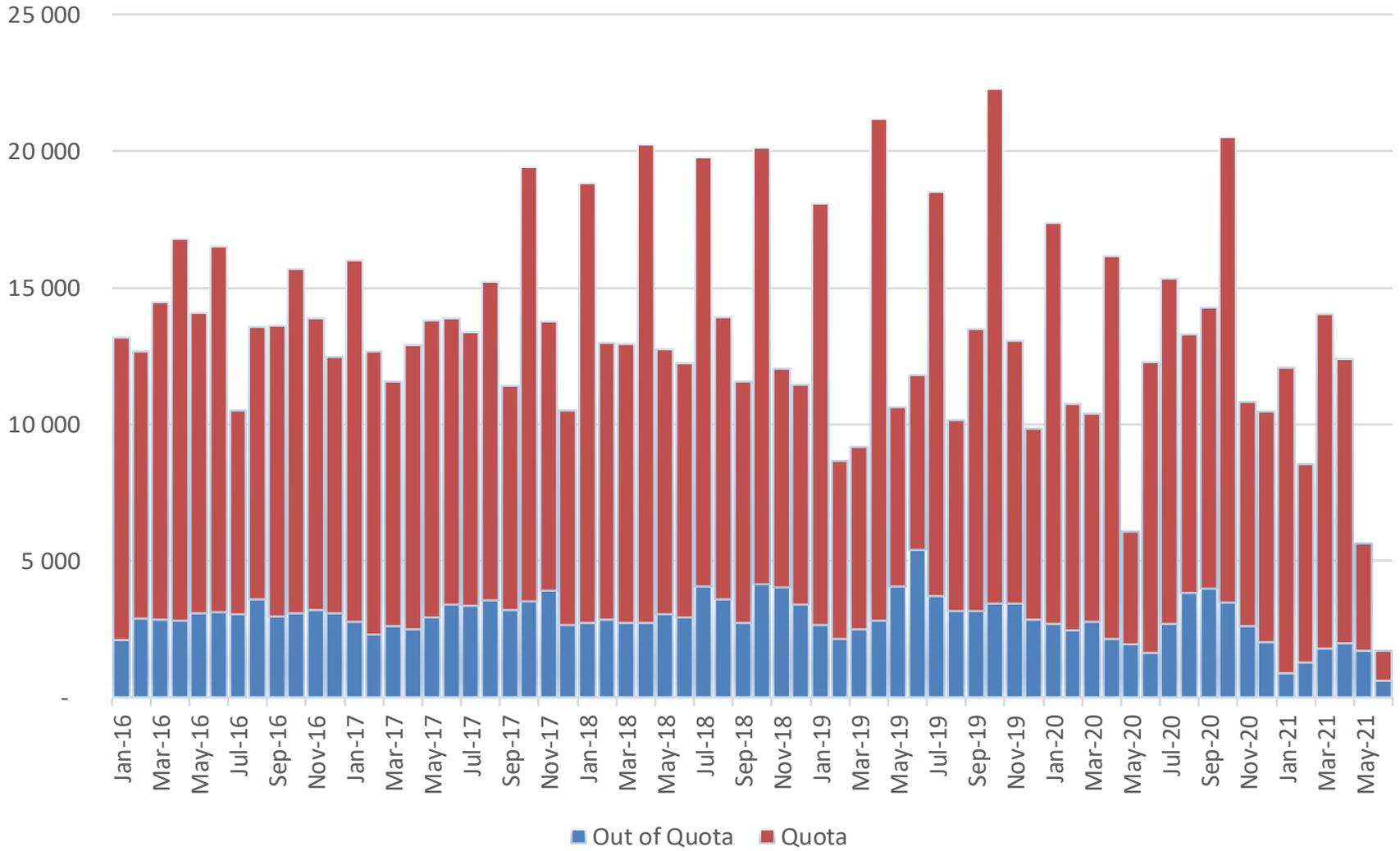


Imports in and out of TRQs

EU Imports of Beef and Beef Products from Third Countries



EU Imports of Beef and Beef Products from Mercosur (in Tons of Carcase Weight)



High quality beef import quotas

Quota erga omnes

Order n° 09.2202

Origin

Regulation (EU) No 481/2012

GATT 2018-2019

Hilton Quota

Regulation (EU) N° 593/2013

	Quantity allocated (Tons)	2018/2019		2019/2020		2020/2021*	
		Use		Use		Use	
09.4001 Australia	2 250						
09.4004 Argentina	199	11,05	5,53%	8,34	4,17%	1,80	0,91%
09.4450 Argentina	14 189	29 491,35	99,97%	26 649,20	90,34%	5 833,05	41,11%
09.4451 Australia	1 768	4 942,02	69,12%	3 000,01	41,96%	216,11	12,22%
09.4452 Uruguay	2 465	6 363,76	99,81%	4 520,57	70,90%	1 635,72	66,37%
09.4453 Brazil	7 304	4 147,19	41,47%	2 884,79	28,85%	553,61	7,58%
09.4454 New Zealand	447	980,60	75,43%	859,15	66,09%	114,16	25,54%
09.4002 Canada/US	11 500	3 883,04	33,77%	2 703,68	23,51%	1 025,25	8,92%
09.4455 Paraguay	346	935,41	93,54%	680,40	68,04%	163,81	47,39%
Total Beef	38 018	50 743,37	75,93%	41 297,80	61,80%	9 541,71	25,10%
Total Buffalo	2 449	11,05	0,45%	8,34	0,34%	1,80	0,07%
Total	40 467	50 754,42	73,26%	41 306,14	59,63%	9 543,51	23,58%

30.04.2021

Quota erga omnes Order n°09.2203

Regulation (EU) No 481/2012

Origin	GATT 2019-2020				
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	Total
United States			4 149	1 873	6 022
Available			4 625	4 625	9 250
Use			89,70%	40,50%	65,10%
After transfer				5 101	
Use				36,72%	

Origin	GATT 2019-2020				
	2020-Q3	2020-Q4	2021-Q1*	2021-Q2	Total
United States	3 680	3 132	2 293	1 847	10 952
Available	4 625	4 625	5 750	5 750	20 750
Use	79,57%	67,72%	39,88%	32,13%	52,78%
After transfer	4 625	5 570	8 188	11 645	
Use		56,23%	28,00%	15,86%	

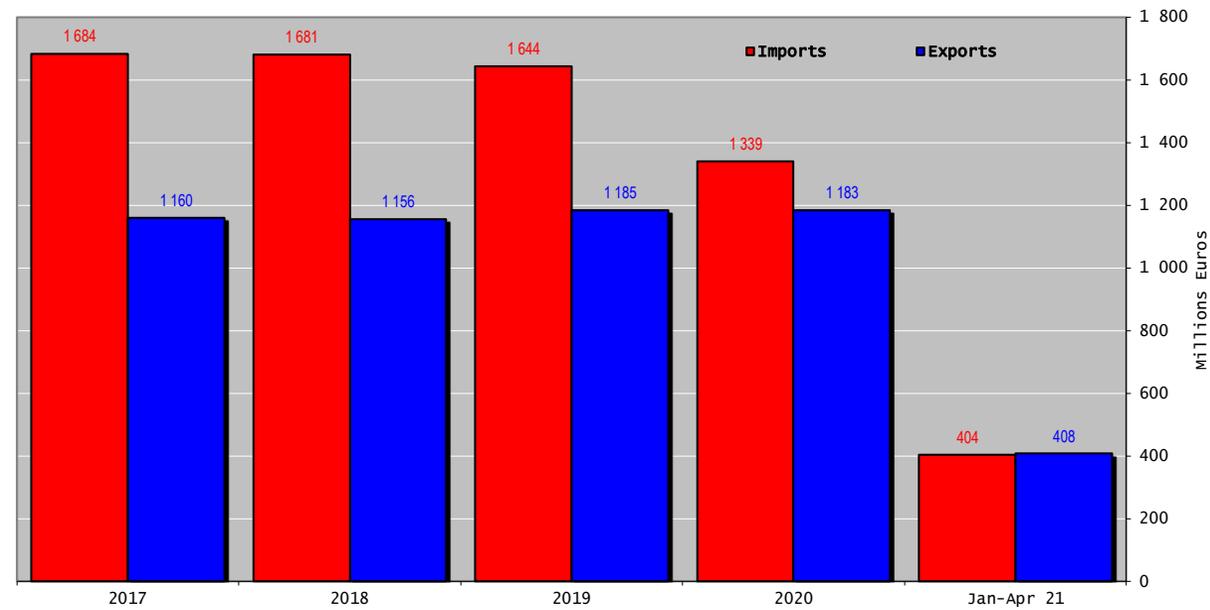
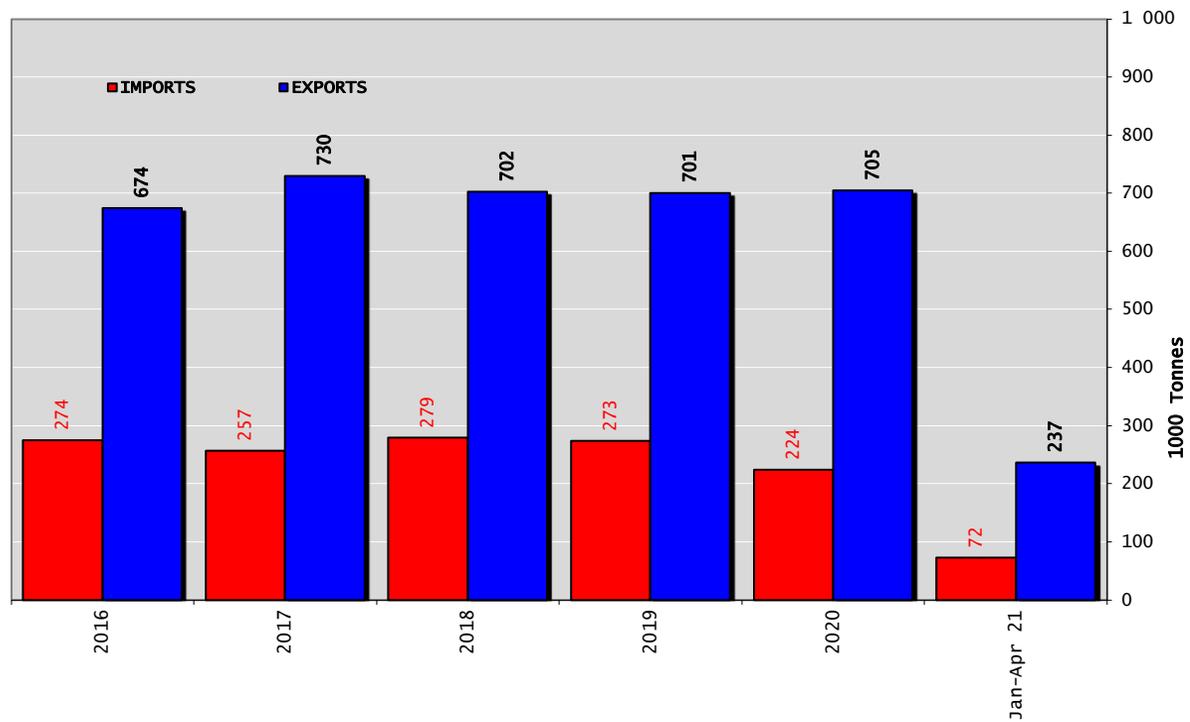
	2018-Q3	2018-Q4	2019-Q1	2019-Q2	Total
Australia	2 400	2 236	2 500	2 855	9 991
Canada	-	-	-	1	1
New Zealand	127	189	194	156	666
US	3 001	3 364	3 428	2 836	12 628
Uruguay	3 643	3 767	3 204	3 621	14 235
Argentina	1 994	1 744	1 647	1 788	7 173
Total import within Quota	11 165	11 300	10 973	11 256	44 693
Available	11 250	11 250	11 250	11 250	45 000
Use	99,24%	100,00%	97,53%	100,00%	99,32%
After transfer	11 250	11 335	11 285	11 562	
Use	99,24%	99,69%	97,23%	97,35%	

Origin	GATT 2019-2020				
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	Total
Australia	2 843	2 438	2 045	1 965	9 291
Canada	3	-	-	-	3
New Zealand	174	157	163	123	618
US	2 638	2 433	-	-	5 071
Uruguay	3 445	3 828	2 690	2 679	12 642
Argentina	2 143	2 403	1 778	1 959	8 284
Total import within Quota	11 246	11 259	6 677	6 726	35 909
Available	11 250	11 250	6 625	6 625	35 750
Use	99,97%	100,00%	100,00%	100,00%	100,00%
After transfer	11 250	11 254	6 619	6 568	
Use	99,97%	100,00%	100,00%	100,00%	

Origin	GATT 2020-2021				
	2020-Q3	2020-Q4	2021-Q1*	2021-Q2	Total
Australia	1 953	1 157	1 620	1 301	6 030
Canada	-	-	4	-	4
New Zealand	6	100	63	34	203
Uruguay	2 835	3 391	2 965	2 808	11 999
Argentina	1 859	1 895	816	1 186	5 756
Total import within Quota *	6 652	6 542	5 467	5 330	23 992
Available	6 625	6 625	5 500	5 500	24 250
Use	100,00%	98,75%	99,41%	96,91%	98,93%
After transfer	6 625	6 598	5 555	5 588	
Use	100,00%	99,16%	98,41%	95,38%	

* Until 12.05.2021

EU Trade Balance of beef and live animals



Thank you



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