



Civil Dialogue Group on Animal Products

Beef and Veal

16 April 2021

EU Bovine livestock evolution

(December survey)

1000 H	Total livestock	Bovine <1 y	Bovine 1-2 y	Bovine >2 y
EU	76 245	23 187	15 559	37 499
2020/2019	-1.2%	-1.0%	-1.3%	-1.2%



	Share	2020/2019
FR	23.1%	-3.2%
DE	14.8%	-2.9%
ES	8.7%	+0.5%
IE	8.6%	-0.5%
IT	8.4%	+0.4%
PL	8.2%	+0.3%

	Share	2020/2019
FR	37.0%	-0.4%
ES	19.4%	+1.5%
IE	8.5%	-3.6%
DE	5.8%	-2.1%
IT	3.4%	+2.8%
PL	2.5%	+10.9%



1000 H	Total cows	Dairy cows	Other cows
EU	31 344	20 545	10 796
2020/2019	-0.5%	-1.1%	+0.4%

PRODUCTION

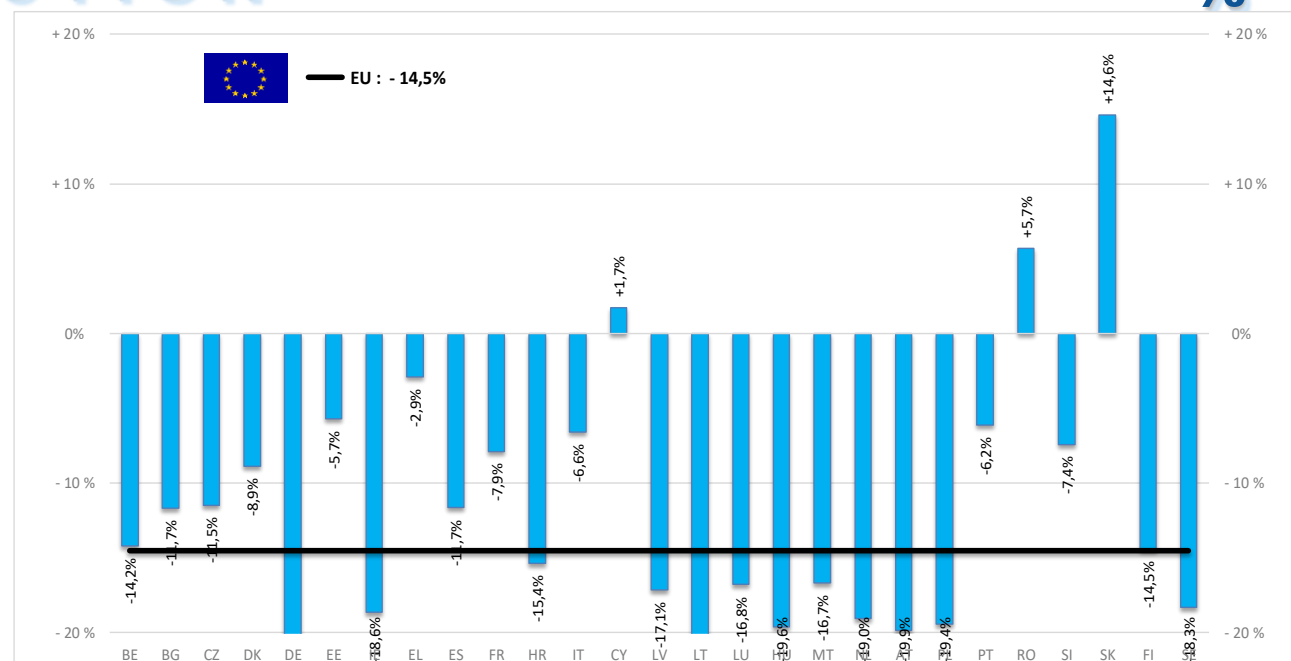
% EVOLUTION

HEADS	Jan-Jan 21/20
	EU
Bull	-13,3%
Bullock	-14,0%
Cow	-16,4%
Heifer	-12,3%
Calve	-14,1%
Young cattle	-17,3%
Meat of bovine animals	-14,5%

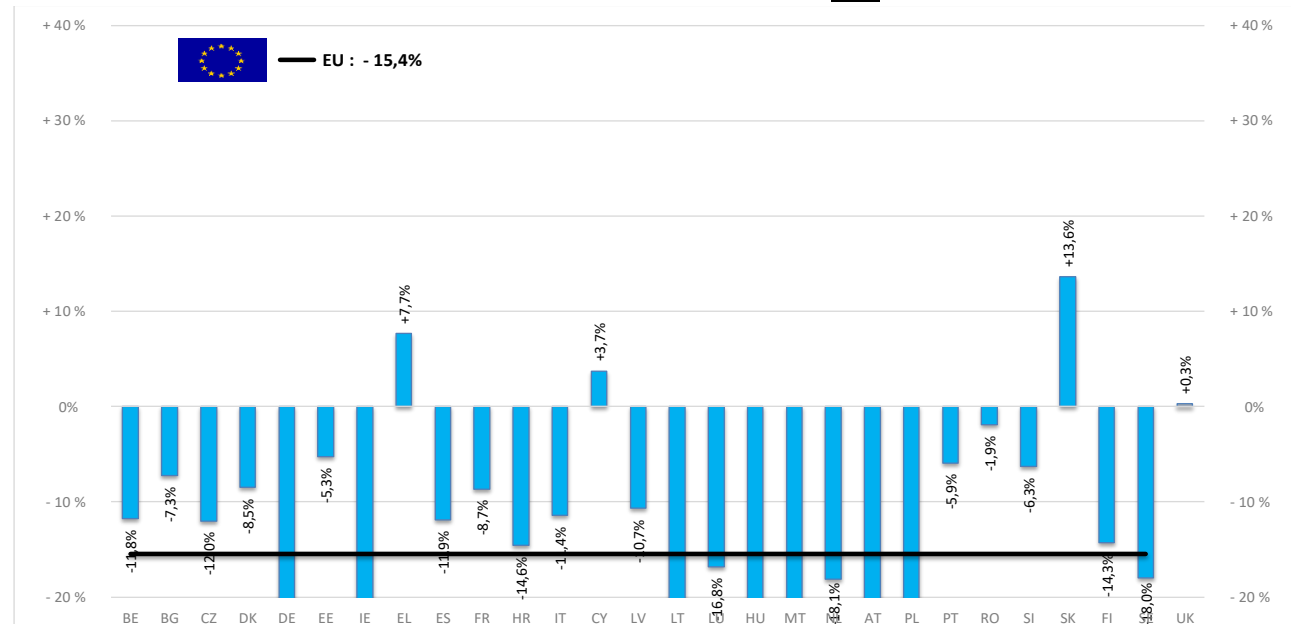
Estimates for last month of period :

TONNES	Jan-Jan 21/20
	EU
Bull	-14,7%
Bullock	-15,2%
Cow	-17,0%
Heifer	-14,2%
Calve	-14,9%
Young cattle	-18,0%
Meat of bovine animals	-15,4%

Estimates for last month of period :

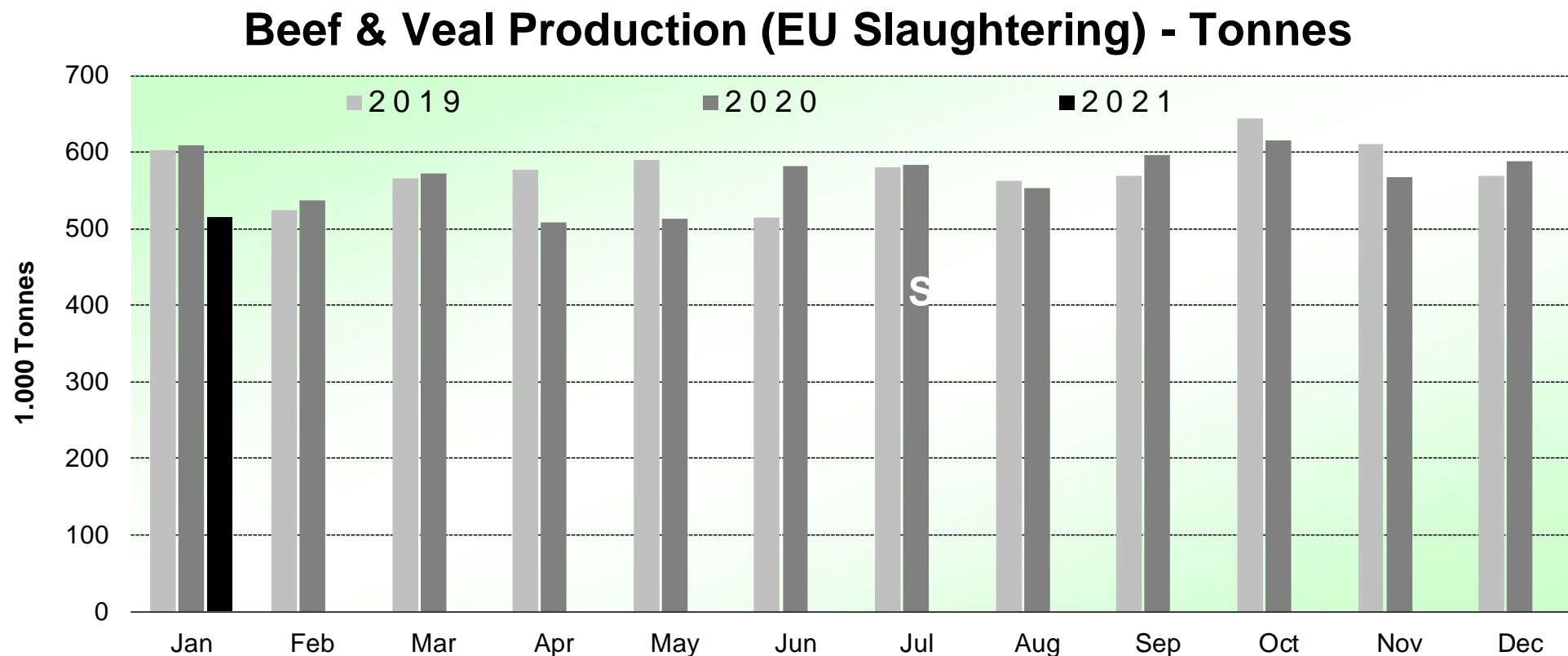


Source : EStat - Newcronos



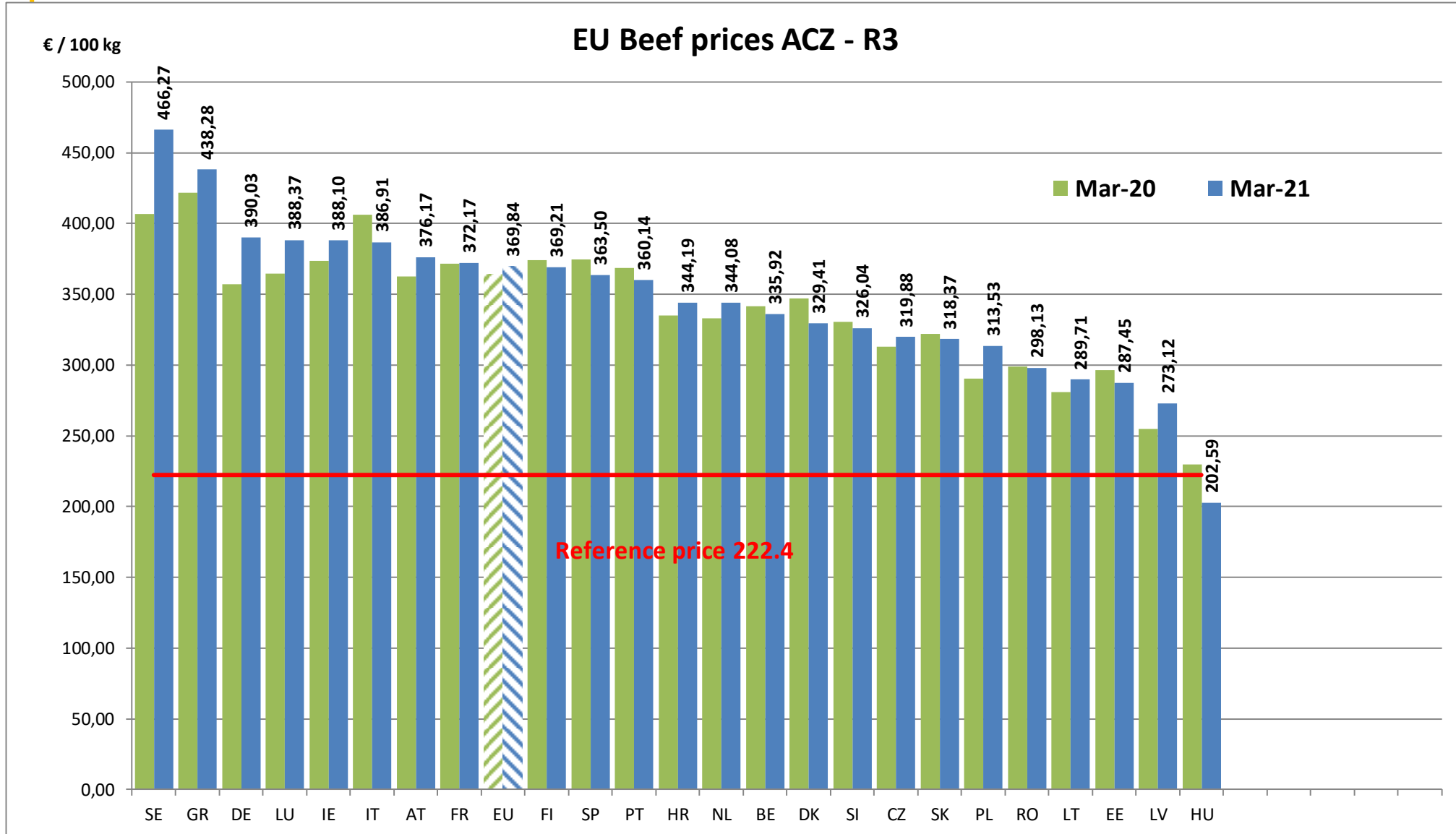
Source : EStat - Newcronos

EU Slaughterings (tonnes)



Source : EStat-Newcronos

March 2021 EU beef prices



PRICES CARCASSES

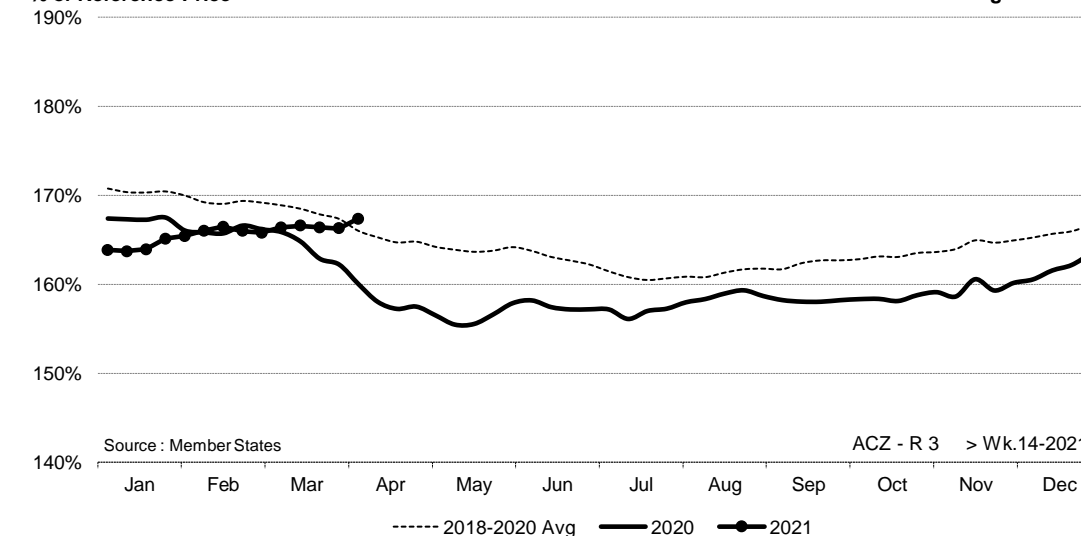
EU Prices week		14	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	372,2	€/100 kg	+ 0,7%	+ 0,6%	+ 4,6%
	Young Bovines (Z)	365,6		+ 0,5%	+ 0,3%	+ 0,5%
	Young Bulls (A)	371,3		+ 0,7%	+ 0,4%	+ 4,9%
	Steers (C)	386,8		+ 0,8%	+ 1,9%	+ 8,6%
	Cows (D)	294,0		+ 0,9%	+ 1,5%	+ 12,2%
	Heifers (E)	380,8		+ 0,8%	+ 0,5%	+ 6,6%
Live Animals	Male Calves Dairy Type	82,52	€/head	+ 6,0%	+ 21,3%	+ 12,9%
	Male Calves Beef Type	202,8		+ 2,9%	+ 6,8%	+ 8,1%
	Young Store Cattle	2,44	€/kg	+ 0,5%	+ 1,1%	+ 1,0%
	Yearling Male Store Cattle	2,31		+ 2,0%	+ 3,3%	+ 1,9%
	Yearling Female Store Cattle	2,52		+ 0,3%	+ 1,1%	+ 6,8%
	Calves slaughtered <8M	489,9	€/100	- 0,7%	- 1,6%	+ 2,1%

EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.14-2021

% of Reference Price

€/100 kg cwe



Price in week 14 : 372,27

% change y/y : + 4,60%

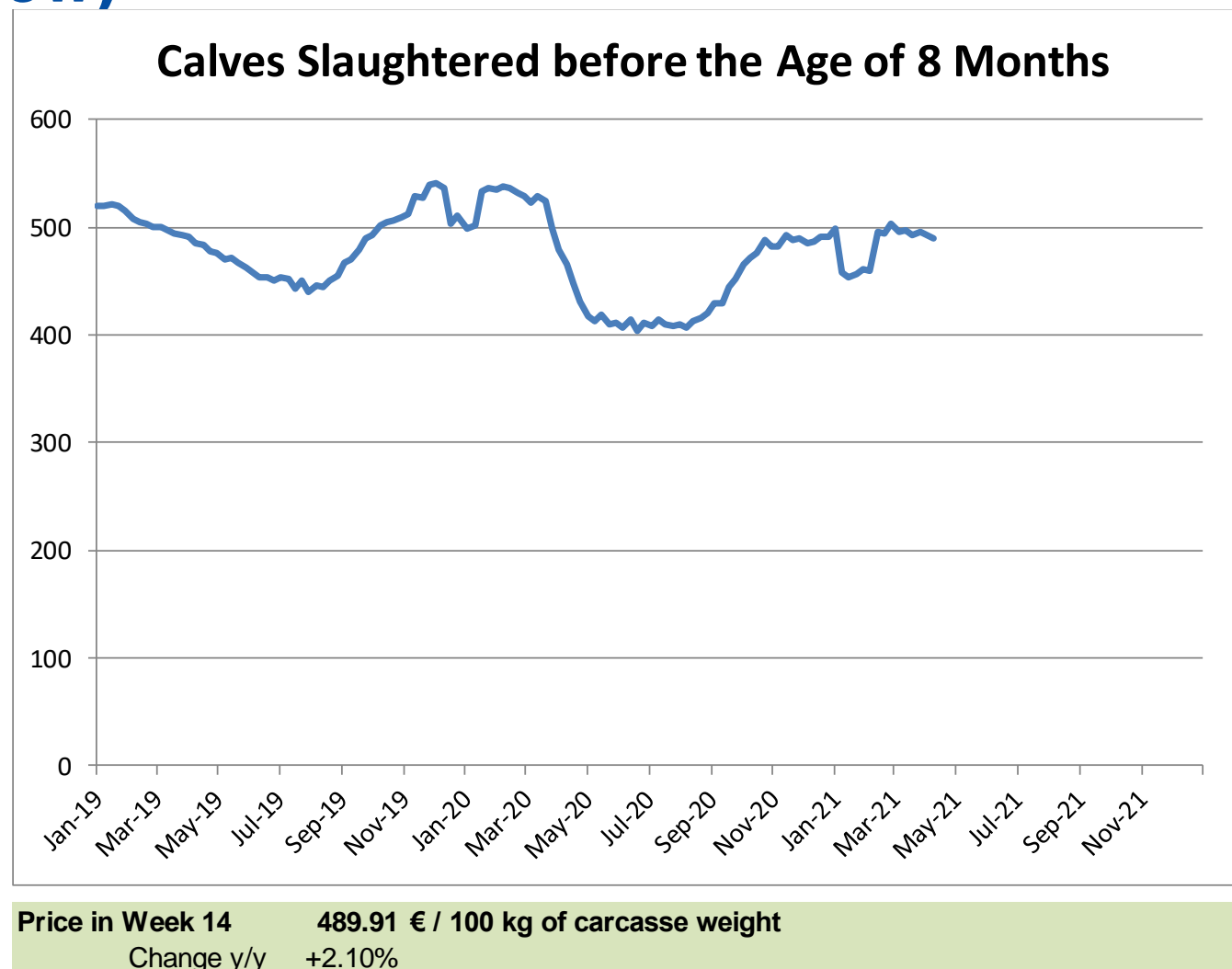
% Ref. Price in wk 14 : 167,4%

Average price in March 2021 : 369,83

% change y/y : + 1,55%

PRICES CARCASSES

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



EU exports

EU Exports of Beef and Live Animals

Trade figures (COMEXT – tonnes cwe)

Destinations	2017		2018		2019		2020		Jan-Feb 21		Compared to Jan-Feb 20
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Israel	44 196	6,1%	47 774	6,8%	49 629	7,1%	56 965	8,1%	7 563	7,0%	- 1,0%
Ghana	37 744	5,2%	36 766	5,2%	39 196	5,6%	47 408	6,7%	7 364	6,9%	- 9,7%
Philippines	37 102	5,1%	28 766	4,1%	34 158	4,9%	39 920	5,7%	7 020	6,5%	+ 4,8%
Hong Kong	76 086	10,4%	55 537	7,9%	46 748	6,7%	56 860	8,1%	6 838	6,4%	+ 12,2%
Bosnia-Herz.	34 711	4,8%	38 762	5,5%	41 119	5,9%	35 758	5,1%	5 517	5,1%	+ 7,8%
Ivory Coast	36 038	4,9%	36 064	5,1%	33 396	4,8%	32 460	4,6%	5 364	5,0%	- 11,8%
Algeria	26 305	3,6%	35 410	5,0%	57 152	8,2%	39 416	5,6%	5 071	4,7%	- 43,1%
Lebanon	38 322	5,3%	42 542	6,1%	36 393	5,2%	33 656	4,8%	5 046	4,7%	+ 6,6%
Norway	12 850	1,8%	7 925	1,1%	7 667	1,1%	12 931	1,8%	4 052	3,8%	+ 147,5%
Switzerland	26 708	3,7%	23 761	3,4%	25 188	3,6%	29 996	4,3%	4 013	3,7%	- 16,4%
Libya	27 848	3,8%	27 878	4,0%	24 541	3,5%	21 971	3,1%	3 230	3,0%	- 12,1%
Saudi Arabia	4 691	0,6%	2 521	0,4%	2 809	0,4%	9 707	1,4%	2 894	2,7%	+++
Canada	2 424	0,3%	2 225	0,3%	6 806	1,0%	20 475	2,9%	2 525	2,4%	- 27,6%
Ukraine	7 331	1,0%	10 465	1,5%	13 836	2,0%	15 857	2,3%	2 488	2,3%	- 4,8%
Turkey	96 413	13,2%	96 052	13,7%	34 555	4,9%	22 107	3,1%	2 423	2,3%	- 11,7%
Kosovo	1 699	0,2%	6 693	1,0%	10 279	1,5%	10 912	1,5%	2 342	2,2%	+ 37,8%
<i>Other Destinations</i>	<i>219 050</i>	<i>30,0%</i>	<i>203 099</i>	<i>28,9%</i>	<i>237 118</i>	<i>33,8%</i>	<i>218 234</i>	<i>31,0%</i>	<i>33 629</i>	<i>31,3%</i>	
Total (without UK)	729 519		702 242		700 590		704 633		107 379		
% change			- 4%		- 0%		+ 1%		- 5,4%		

EU exports

EU Exports of Beef

Trade figures (COMEXT – tonnes cwe)

Destinations	2017		2018		2019		2020		Jan-Feb 21		Compared to Jan-Feb 20
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Ghana	37 744	7,7%	36 766	7,9%	39 196	8,2%	47 408	9,7%	7 364	9,6%	- 9,7%
Philippines	37 102	7,5%	28 766	6,2%	34 158	7,2%	39 920	8,1%	7 020	9,1%	+ 4,8%
Hong Kong	76 086	15,4%	55 537	11,9%	46 748	9,8%	56 860	11,6%	6 838	8,9%	+ 12,2%
Ivory Coast	36 028	7,3%	36 064	7,7%	33 396	7,0%	32 460	6,6%	5 364	7,0%	- 11,8%
Bosnia-Herz.	32 181	6,5%	36 152	7,7%	38 806	8,2%	33 459	6,8%	5 123	6,7%	+ 7,2%
Norway	12 849	2,6%	7 922	1,7%	7 667	1,6%	12 931	2,6%	4 052	5,3%	+++
Switzerland	25 570	5,2%	22 711	4,9%	24 110	5,1%	28 941	5,9%	3 781	4,9%	- 17,0%
Israel	18 750	3,8%	22 163	4,7%	23 026	4,8%	21 967	4,5%	3 394	4,4%	- 14,4%
Canada	2 424	0,5%	2 225	0,5%	6 806	1,4%	20 475	4,2%	2 525	3,3%	- 27,6%
Ukraine	6 926	1,4%	9 887	2,1%	12 893	2,7%	14 861	3,0%	2 450	3,2%	- 5,9%
USA	3 756	0,8%	5 458	1,2%	7 867	1,7%	12 310	2,5%	2 148	2,8%	+ 10,6%
North Macedonia	11 285	2,3%	10 002	2,1%	11 395	2,4%	10 551	2,1%	1 938	2,5%	+ 5,6%
Japan	4 281	0,9%	3 452	0,7%	8 007	1,7%	11 885	2,4%	1 761	2,3%	- 43,0%
Cuba	2 040	0,4%	2 202	0,5%	1 702	0,4%	3 548	0,7%	1 724	2,2%	+ 66,3%
Angola	10 982	2,2%	11 470	2,5%	8 410	1,8%	9 410	1,9%	1 610	2,1%	- 28,8%
Chile	8 961	1,8%	16 410	3,5%	12 461	2,6%	8 664	1,8%	1 566	2,0%	+ 7,0%
Other Destinations	166 148	33,7%	159 996	34,2%	158 992	33,4%	125 401	25,5%	18 272	23,8%	
Total to Third Countries	493 112		467 183		475 639		491 052		76 931		
% change			- 5%		+ 2%		+ 3%		- 8,1%		

EU imports

Origins	2017		2018		2019		2020		Jan-Feb 21		Compared to Jan-Feb 20
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Uruguay	55 212	21,2%	48 712	16,9%	40 483	14,5%	50 864	20,8%	27 143	52,7%	+++
Brazil	87 157	33,5%	103 979	36,1%	99 569	35,6%	84 172	34,4%	11 211	21,8%	- 25,0%
Argentina	49 259	18,9%	69 011	24,0%	70 618	25,3%	60 613	24,8%	6 561	12,7%	- 43,3%
Australia	18 193	7,0%	17 368	6,0%	16 516	5,9%	11 007	4,5%	2 212	4,3%	- 22,4%
USA	21 624	8,3%	19 268	6,7%	16 852	6,0%	16 532	6,8%	1 799	3,5%	- 53,6%
Switzerland	5 138	2,0%	5 437	1,9%	4 433	1,6%	4 325	1,8%	987	1,9%	+ 17,8%
New Zealand	6 806	2,6%	7 165	2,5%	6 726	2,4%	6 101	2,5%	484	0,9%	- 56,2%
Canada	512	0,2%	1 343	0,5%	2 518	0,9%	1 550	0,6%	340	0,7%	+++
Namibia	5 043	1,9%	3 442	1,2%	7 706	2,8%	1 445	0,6%	187	0,4%	- 27,8%
N.det.Extra	72	0,0%	127	0,0%	196	0,1%	94	0,0%	120	0,2%	+++
Paraguay	5 922	2,3%	5 520	1,9%	5 203	1,9%	4 234	1,7%	115	0,2%	- 81,9%
Serbia	565	0,2%	1 134	0,4%	1 062	0,4%	949	0,4%	98	0,2%	- 61,5%
Norway	389	0,1%	153	0,1%	129	0,0%	395	0,2%	95	0,2%	+++
Japan	645	0,2%	791	0,3%	997	0,4%	789	0,3%	59	0,1%	- 52,2%
Botswana	2 686	1,0%	3 119	1,1%	4 950	1,8%	788	0,3%	31	0,1%	- 84,6%
Chile	319	0,1%	356	0,1%	392	0,1%	168	0,1%	18	0,0%	- 71,2%
Other Destinations	960	0,4%	890	0,3%	954	0,3%	706	0,3%	66	0,1%	
Total (without UK)	260 503		287 814		279 304		244 732		51 526		
% change			+ 10%		- 3%		- 12%		+ 19,0%		

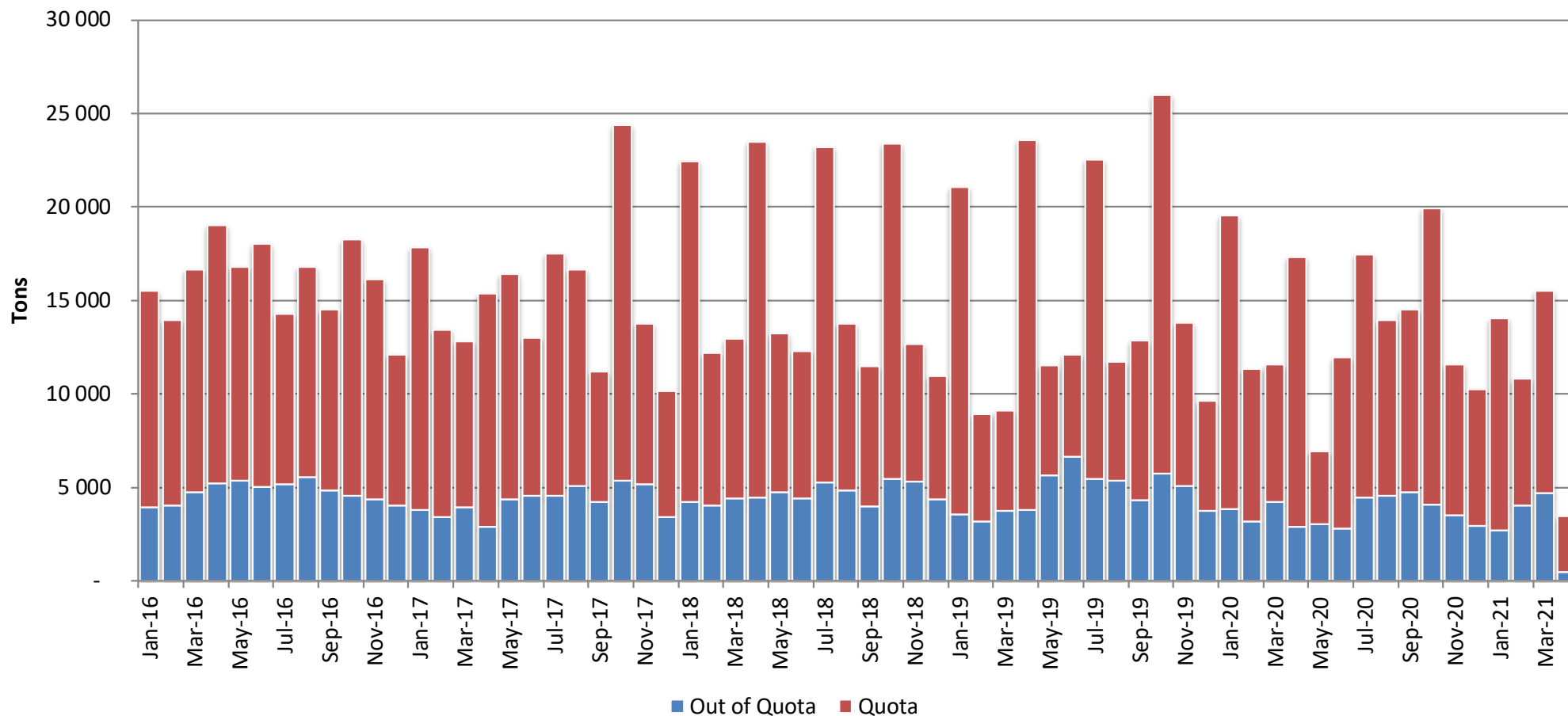
EU Exports/Import of Beef and Live Animals to/from UK in January 2021 (COMEXT)

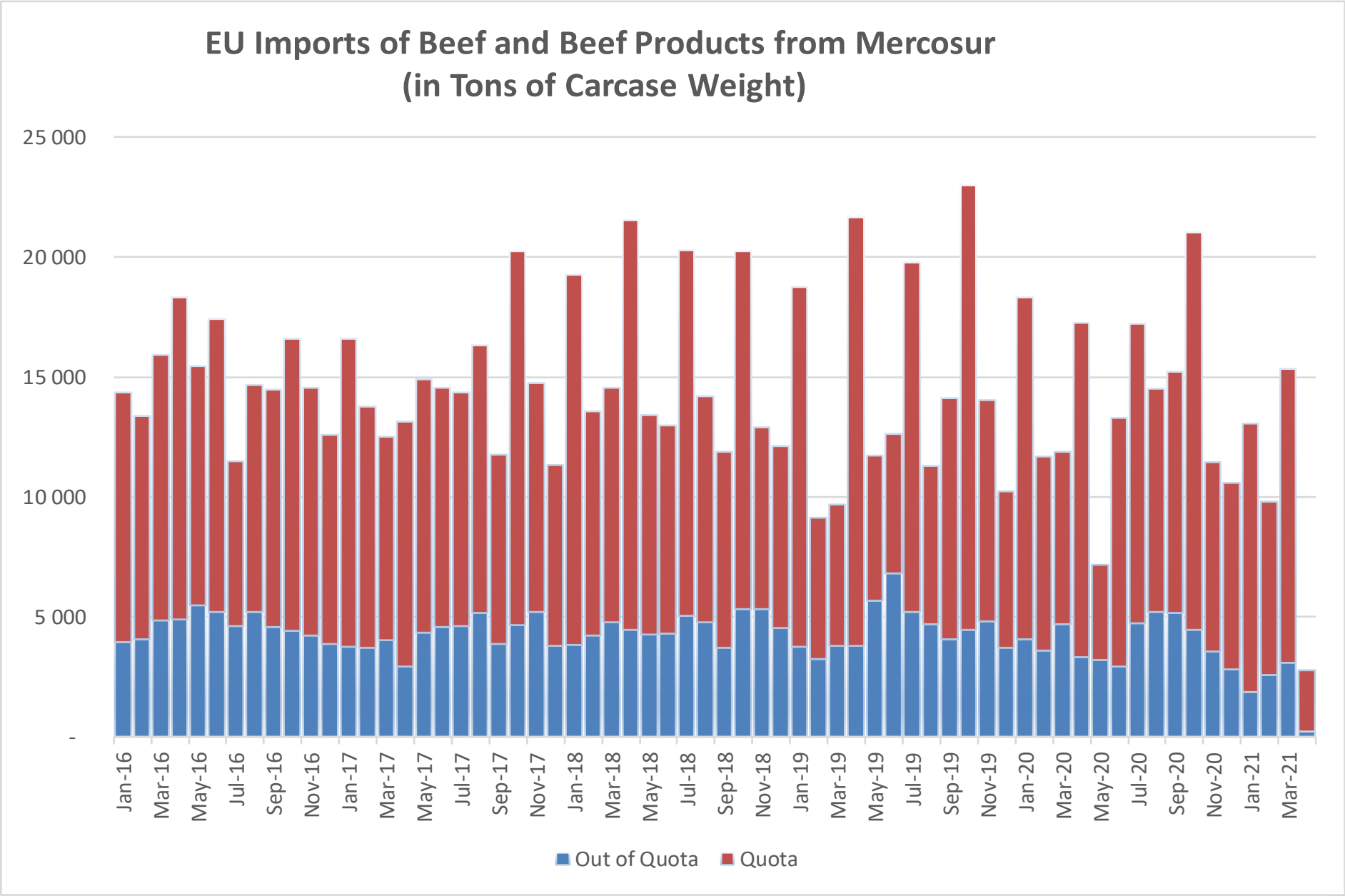
In Tons of Carcase Weight				
	2019	2020	2021	2021/2020
Exports	38 592	32 852	19 032	-42%
Live Animals	854	693	335	-52%
Meats	37 738	32 159	18 697	-42%
Imports	19 802	12 034	4 726	-61%
Live Animals	132	108	52	-52%
Meats	19 670	11 925	4 674	-61%
In Percentage of Total EU trade				2021/2020
Exports	44,05	35,57	27,22	- 8,35
Live Animals	5,72	4,10	2,31	- 1,80
Meats	51,93	42,62	33,77	- 8,84
Imports	37,39	31,36	13,29	- 18,07
Live Animals	87,46	97,75	71,87	- 25,88
Meats	37,25	31,16	13,17	- 18,00

In Thousand Euros				
	2019	2020	2021	2021/2020
Exports	129 765	112 244	77 825	-31%
Live Animals	4 795	3 582	3 436	-4%
Meats	124 970	108 662	74 390	-32%
Imports	51 643	46 243	14 971	-68%
Live Animals	581	425	157	-63%
Meats	51 062	45 818	14 814	-68%
In Percentage of Total EU trade				2021/2020
Exports	45,87	37,29	34,25	- 3,04
Live Animals	6,57	4,31	5,00	0,69
Meats	59,55	49,87	46,92	- 2,95
Imports	20,76	21,28	12,14	- 9,14
Live Animals	90,82	91,77	64,17	- 27,60
Meats	20,58	21,13	12,03	- 9,10

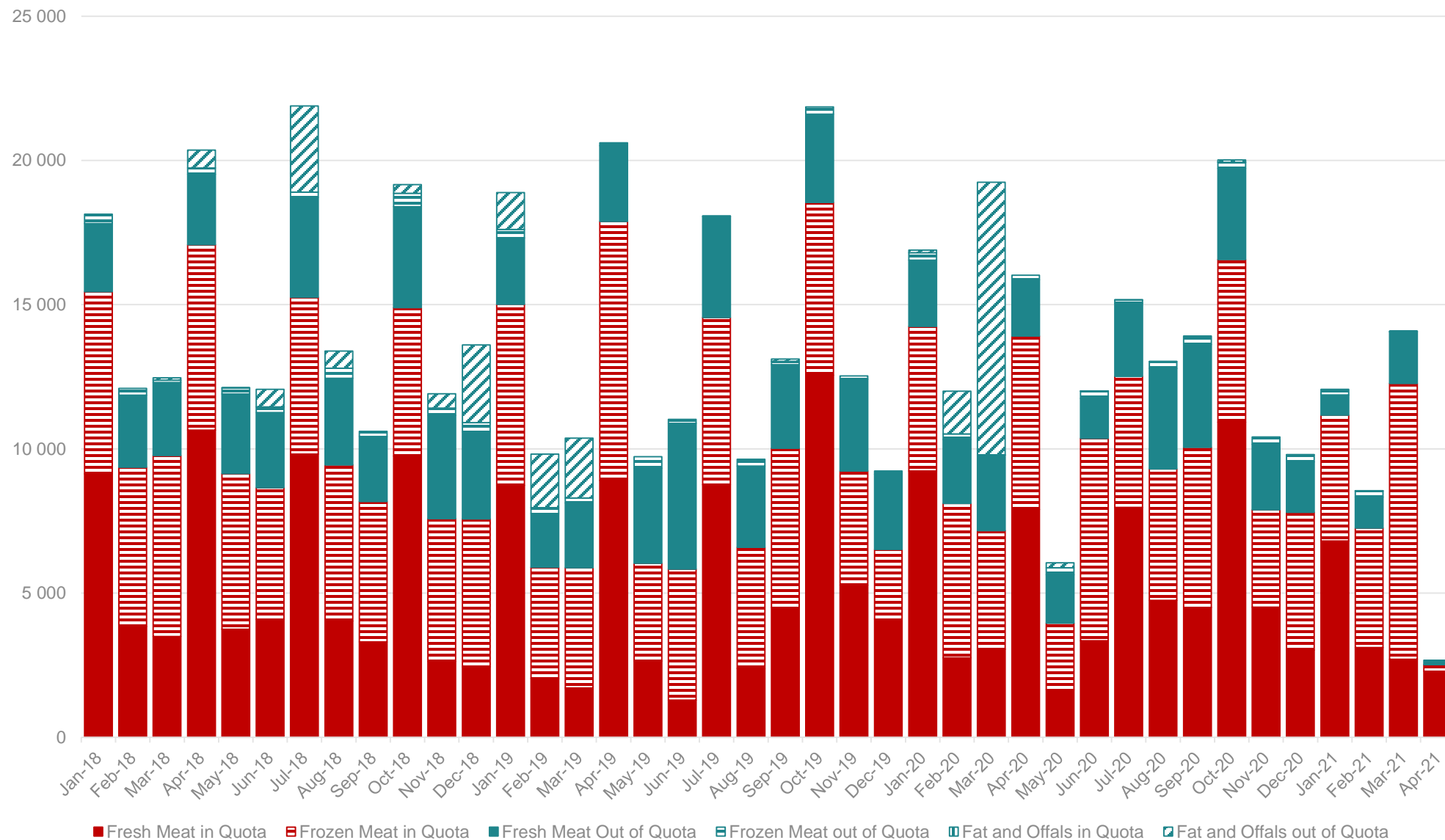
Imports in and out of TRQs

EU Imports of Beef and Beef Products from Third Countries

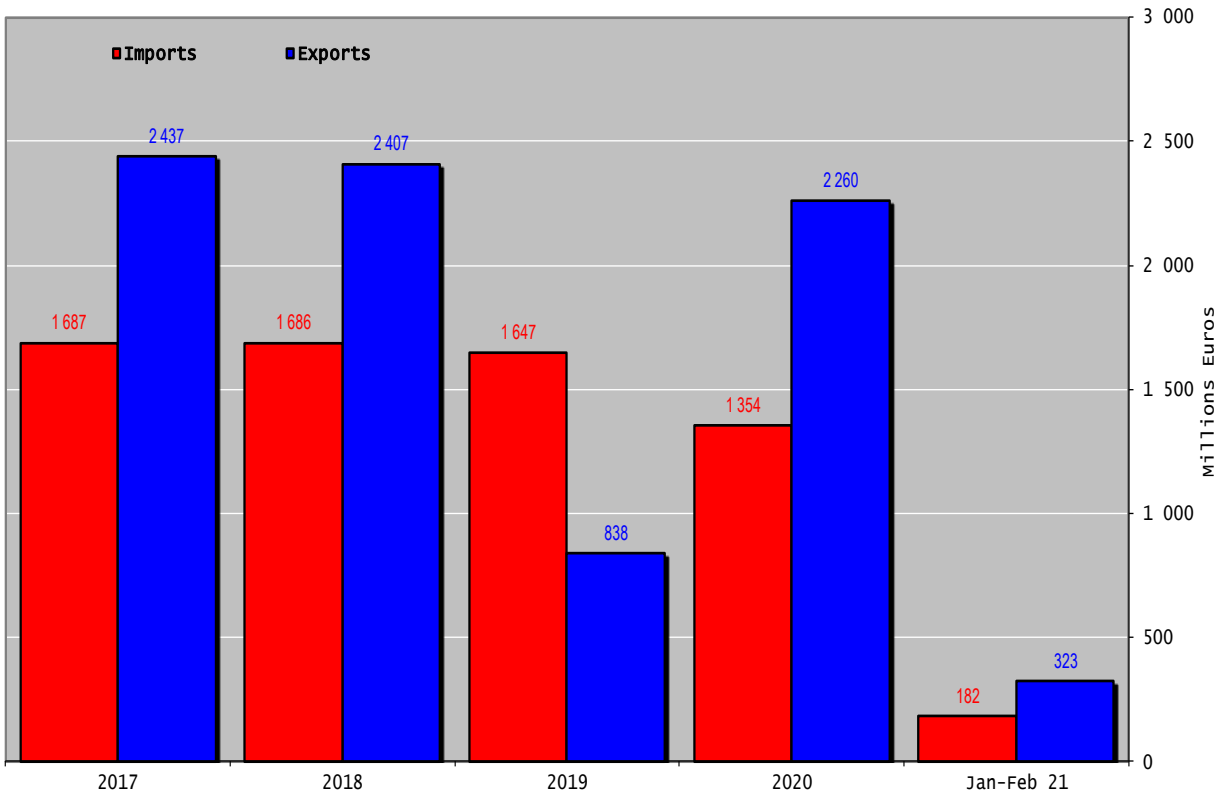
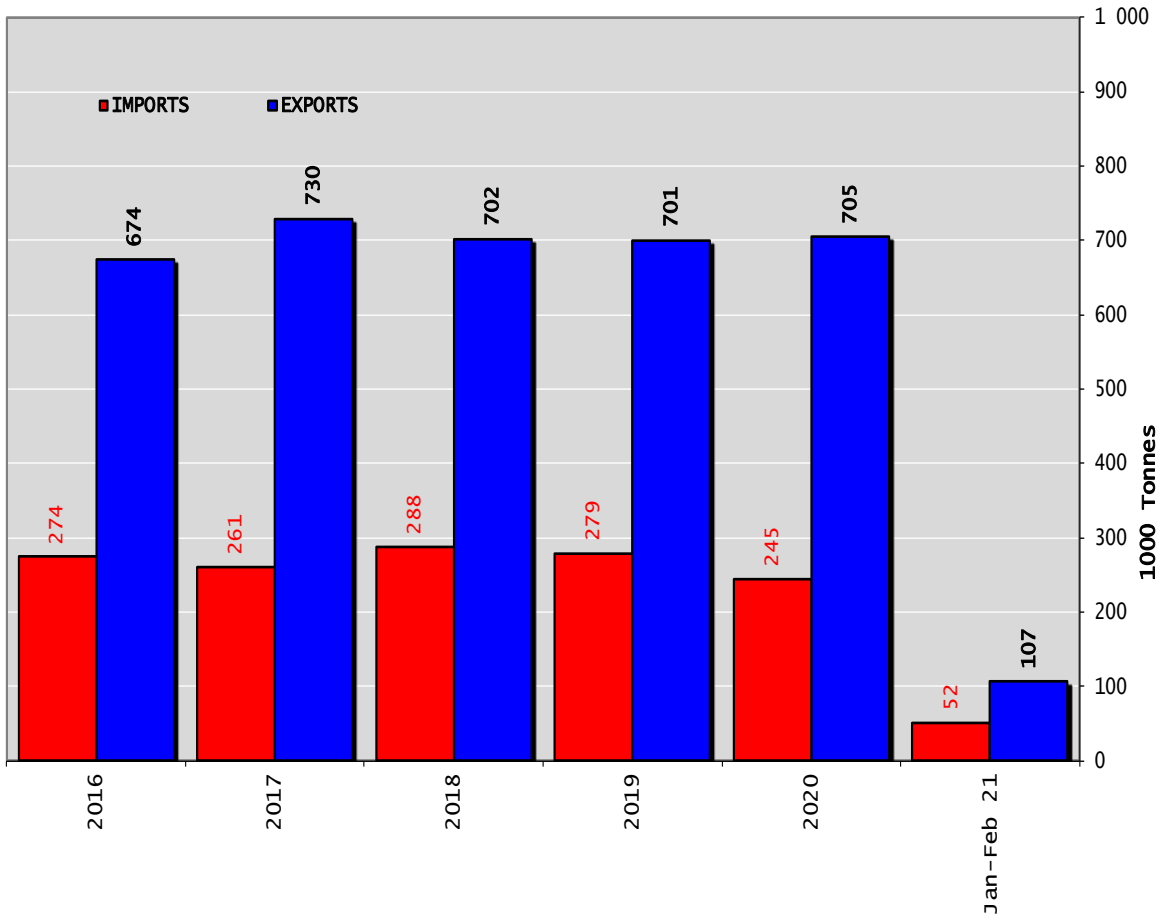




EU Imports of Beef and Beef Products from Mercosur (in Tons of Carcase Weight)



EU Trade Balance of beef and live animals



Thank you



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