

# BEEF & VEAL MARKET SITUATION



Civil Dialog Group  
23 November 2018

# LIVESTOCK

# EU EVOLUTION TOTAL BOVINE

## JUNE SURVEY

May/Jun 1000 Hd	TOT LIVESTOCK				%Var 2018 2017	BOVINE < 1 Year				%Var 2018 2017	BOVINE 1-2 Year				%Var 2018 2017	BOVINE > 2 Year				%Var 2018 2017
	2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018	
BE	2 531	2 555	2 454	2 450	-0.2%	744	750	717	710	-0.9%	504	512	500	492	-1.6%	1 283	1 293	1 237	1 247	+0.8%
BG																				
CZ																				
DK	1 568	1 583	1 565	1 560	-0.3%	524	547	527	538	+2.1%	316	307	311	294	-5.5%	728	730	727	729	+0.3%
DE	12 653	12 563	12 366	12 093	-2.2%	3 846	3 805	3 723	3 618	-2.8%	3 002	2 983	2 948	2 848	-3.4%	5 805	5 775	5 694	5 627	-1.2%
EE																				
IE	6 964	7 221	7 364	7 349	-0.2%	2 042	2 126	2 131	2 078	-2.5%	1 705	1 853	1 914	1 919	+0.2%	3 216	3 242	3 319	3 351	+1.0%
EL																				
ES	6 234	6 451	6 588	6 725	+2.1%	2 281	2 413	2 480	2 504	+1.0%	898	896	927	990	+6.8%	3 055	3 141	3 181	3 230	+1.5%
FR	19 463	19 559	19 433	18 963	-2.4%	5 603	5 638	5 542	5 258	-5.1%	3 540	3 561	3 523	3 446	-2.2%	10 319	10 362	10 367	10 258	-1.0%
HR																				
IT	6 146	6 183	6 118	6 170	+0.8%	1 670	1 702	1 723	1 757	+1.9%	1 370	1 502	1 472	1 466	-0.4%	3 107	2 979	2 923	2 948	+0.9%
CY																				
LV																				
LT																				
LU																				
HU																				
MT																				
NL	4 134	4 245	4 096	3 918	-4.4%	1 624	1 692	1 602	1 569	-2.1%	672	630	600	523	-12.9%	1 838	1 923	1 893	1 825	-3.6%
AT	1 950	1 933	1 938	1 907	-1.6%	622	605	620	606	-2.3%	437	441	431	433	+0.4%	891	887	888	869	-2.2%
PL	5 961	5 939	6 143	6 201	+0.9%	1 669	1 728	1 721	1 686	-2.0%	1 529	1 576	1 701	1 734	+1.9%	2 763	2 635	2 721	2 781	+2.2%
PT		1 664	1 722	1 722	+0.0%		521	537	529	-1.5%		264	281	274	-2.6%		879	904	919	+1.7%
RO	2 078	2 081	2 012	2 002	-0.5%	477	481	454	444	-2.2%	235	240	229	236	+2.8%	1 366	1 360	1 329	1 322	-0.5%
SI																				
SK																				
FI																				
SE	1 476	1 489	1 501	1 507	+0.4%	466	475	472	475	+0.6%	372	375	385	381	-1.1%	638	639	644	652	+1.1%
UK	9 919	10 033	10 004	9 891	-1.1%	2 912	2 989	2 940	2 908	-1.1%	2 380	2 474	2 516	2 479	-1.5%	4 626	4 569	4 548	4 504	-1.0%
EU	81 076	83 499	83 305	82 457	-1.0%	24 481	25 473	25 190	24 681	-2.0%	16 959	17 613	17 740	17 514	-1.3%	39 635	40 414	40 375	40 263	-0.3%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2017 AND 2018

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# LIVESTOCK

# EU EVOLUTION TOTAL BOVINE

## JUNE SURVEY

May/Jun 1000 Hd	TOTAL COWS				%Var 2018 2017	DAIRY COWS				%Var 2018 2017	OTHER COWS				%Var 2018 2017
	2015	2016	2017	2018		2015	2016	2017	2018		2015	2016	2017	2018	
BE	987	1 005	970	968	-0.3%	524	536	521	532	+2.1%	463	469	449	435	-3.0%
BG															
CZ															
DK	661	669	665	667	+0.3%	561	572	570	575	+0.9%	99	97	95	91	-4.2%
DE	4 969	4 957	4 885	4 830	-1.1%	4 287	4 272	4 214	4 167	-1.1%	682	685	670	663	-1.1%
EE															
IE	2 372	2 502	2 514	2 529	+0.6%	1 296	1 398	1 433	1 481	+3.4%	1 076	1 104	1 081	1 048	-3.1%
EL															
ES	2 678	2 801	2 832	2 865	+1.2%	853	827	825	825	+0.0%	1 825	1 973	2 007	2 040	+1.7%
FR	7 809	7 838	7 811	7 684	-1.6%	3 606	3 576	3 552	3 509	-1.2%	4 203	4 263	4 259	4 175	-2.0%
HR															
IT	2 375	2 245	2 187	2 192	+0.2%	2 061	1 948	1 907	1 904	-0.1%	314	297	280	288	+2.9%
CY															
LV															
LT															
LU															
HU															
MT															
NL	1 702	1 811	1 753	1 693	-3.4%	1 622	1 743	1 694	1 630	-3.8%	80	68	59	63	+7.0%
AT	762	755	755	740	-2.0%	540	536	540	538	-0.4%	222	218	215	202	-5.8%
PL	2 444	2 332	2 374	2 429	+2.3%	2 279	2 146	2 154	2 233	+3.7%	165	186	220	196	-10.9%
PT		736	747	745	-0.2%		246	244	244	+0.2%		490	504	501	-0.5%
RO	1 233	1 228	1 199	1 197	-0.2%	1 216	1 216	1 184	1 184	+0.1%	17	12	15	12	-19.5%
SI															
SK															
FI															
SE	523	524	530	534	+0.8%	338	331	322	319	-0.8%	184	194	208	215	+3.3%
UK	3 472	3 493	3 481	3 441	-1.1%	1 895	1 897	1 891	1 883	-0.4%	1 576	1 596	1 589	1 558	-2.0%
EU	31 987	32 895	32 702	32 514	-0.6%	21 078	21 243	21 050	21 025	-0.1%	10 907	11 652	11 651	11 488	-1.4%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2017 AND 2018

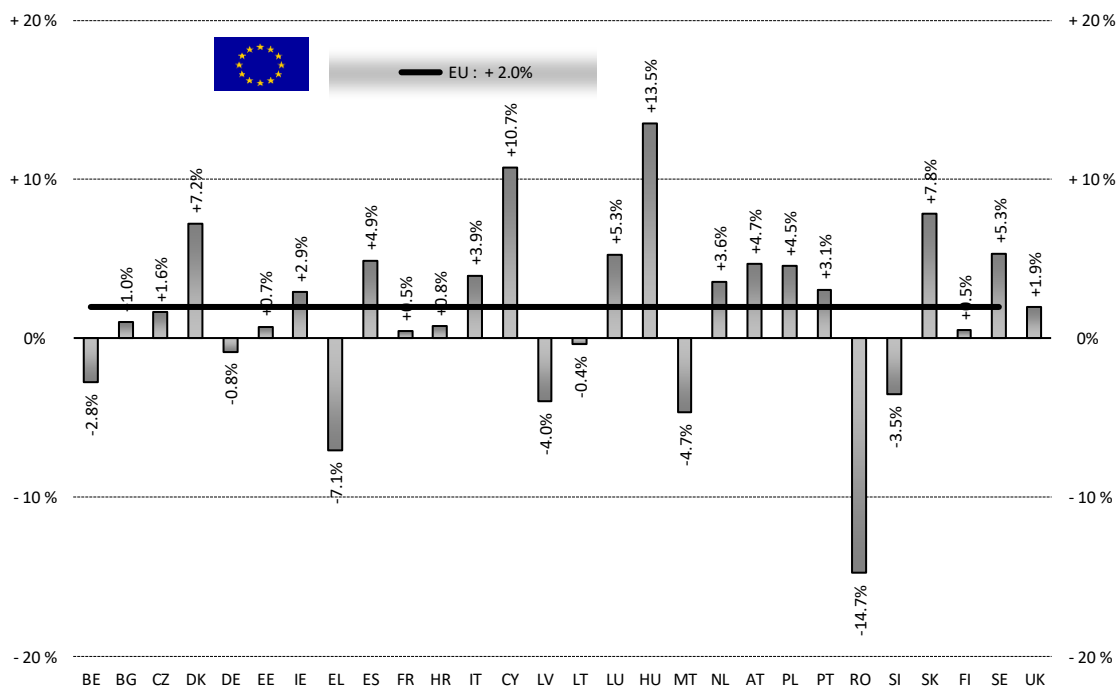
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# PRODUCTION

# % EVOLUTION HEADS

HEADS	Jan-Aug 18/17	
	EU15	EU28
Bull	+0.3%	+1.2%
Bullock	-1.2%	-1.2%
Cow	+3.2%	+2.6%
Heifer	+7.0%	+6.5%
Calve	+0.8%	+0.7%
Young cattle	-1.4%	-1.5%
Meat of bovine animals	+2.0%	+2.0%

Estimates for last month of period :



Source : EStat - Newcronos

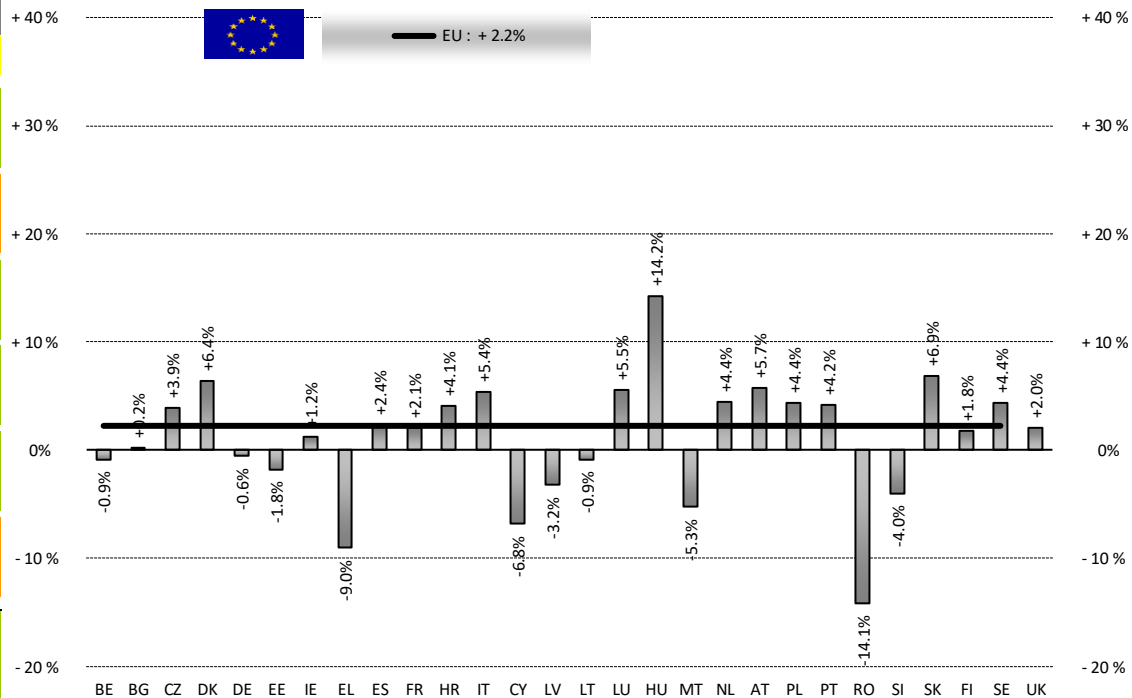
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# PRODUCTION

# % EVOLUTION TONNES

TONNES	Jan-Aug 18/17	
	EU15	EU28
Bull	-0.7%	+0.3%
Bullock	-1.6%	-1.6%
Cow	+4.6%	+3.9%
Heifer	+8.2%	+7.7%
Calve	+1.4%	+1.4%
Young cattle	-3.9%	-4.1%
Meat of bovine animals	+2.2%	+2.2%

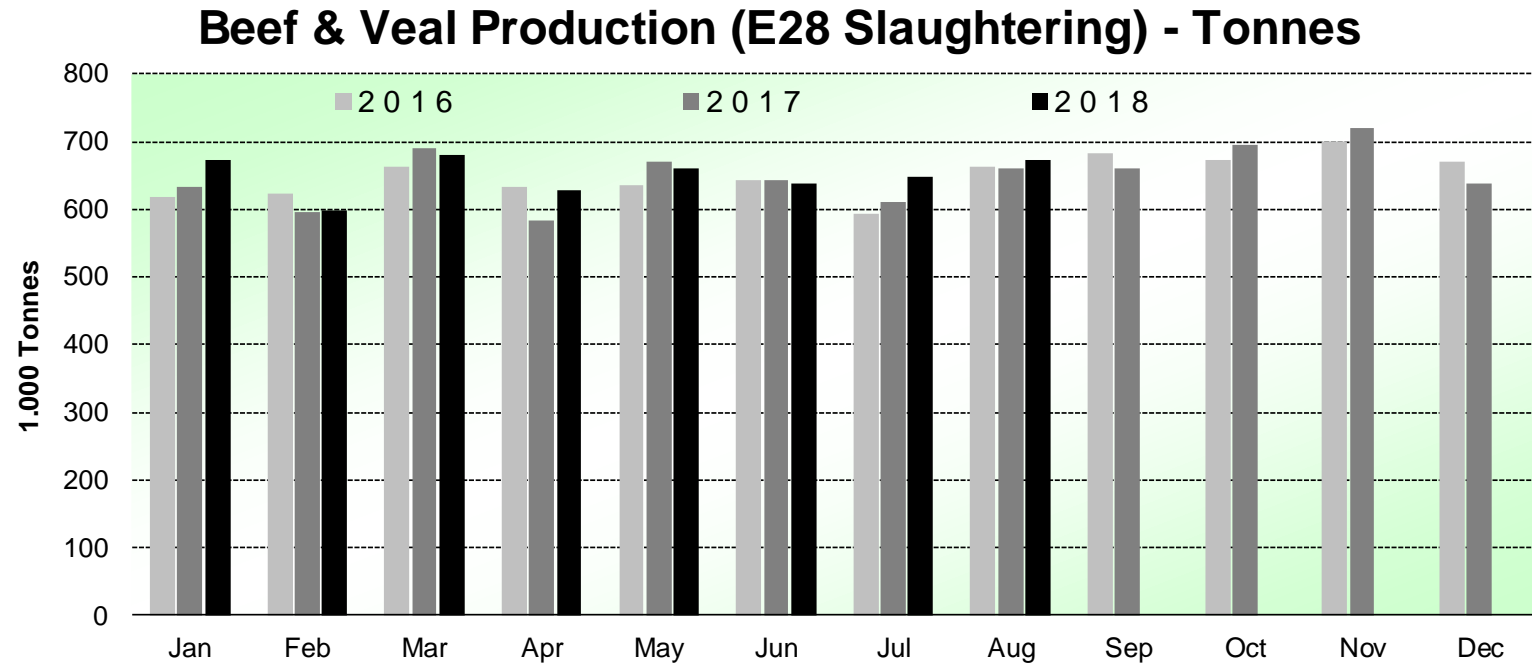
Estimates for last month of period :



Source : EStat - Newcronos

# PRODUCTION

# HISTORIC TONNES



Source : EStat-Newcronos

# PRICES CARCASSES

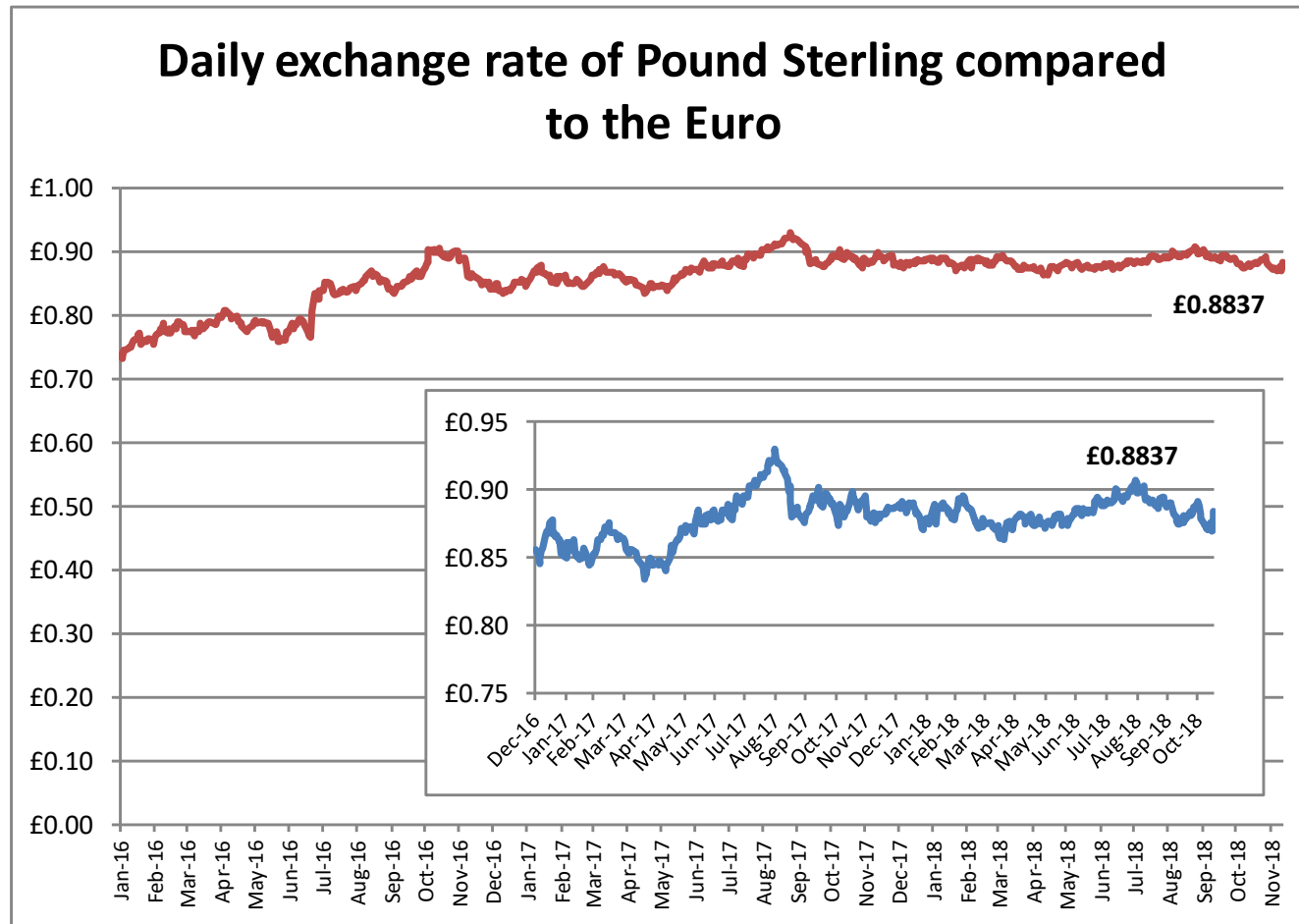
## Dashboard

EU Prices week		45	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	375.2	+ 0.3%	+ 0.3%	- 2.9%
	Young Bovines (Z)	368.8	- 0.0%	+ 0.0%	- 0.0%
	Young Bulls (A)	372.5	+ 0.3%	+ 0.7%	- 4.4%
	Steers (C)	398.2	+ 0.7%	- 0.4%	+ 0.1%
	Cows (D)	278.2	- 0.9%	- 2.8%	- 5.9%
	Heifers (E)	381.5	+ 0.3%	- 0.1%	- 1.6%
Live Animals	Male Calves Dairy Type	77.84	- 5.7%	- 3.2%	- 16.0%
	Male Calves Beef Type	193.2	+ 3.0%	- 4.0%	+ 3.0%
	Young Store Cattle	2.34	+ 0.5%	- 1.2%	- 1.9%
	Yearling Male Store Cattle	2.17	- 0.6%	- 3.4%	- 2.2%
	Yearling Female Store Cattle	2.27	+ 1.6%	- 1.0%	- 1.2%
	Calves slaughtered <8M	511.5	+ 1.4%	+ 1.8%	- 3.8%

Sources : MSs notifications (Regulation (EC) 1249/2008 and 807/2013)

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## EXCHANGE RATE INDEX / Euro

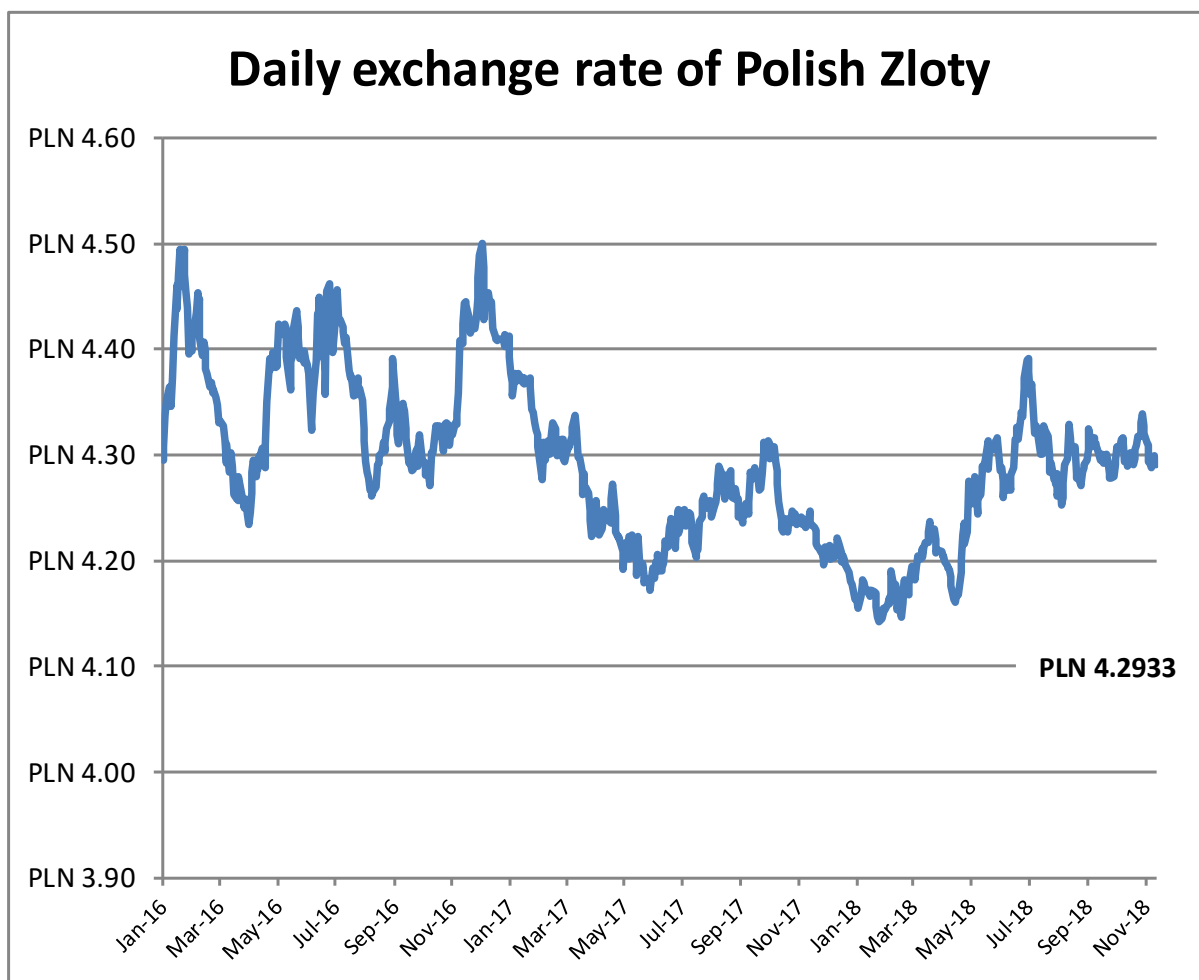


Source : ECB

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## EXCHANGE RATE INDEX / Euro



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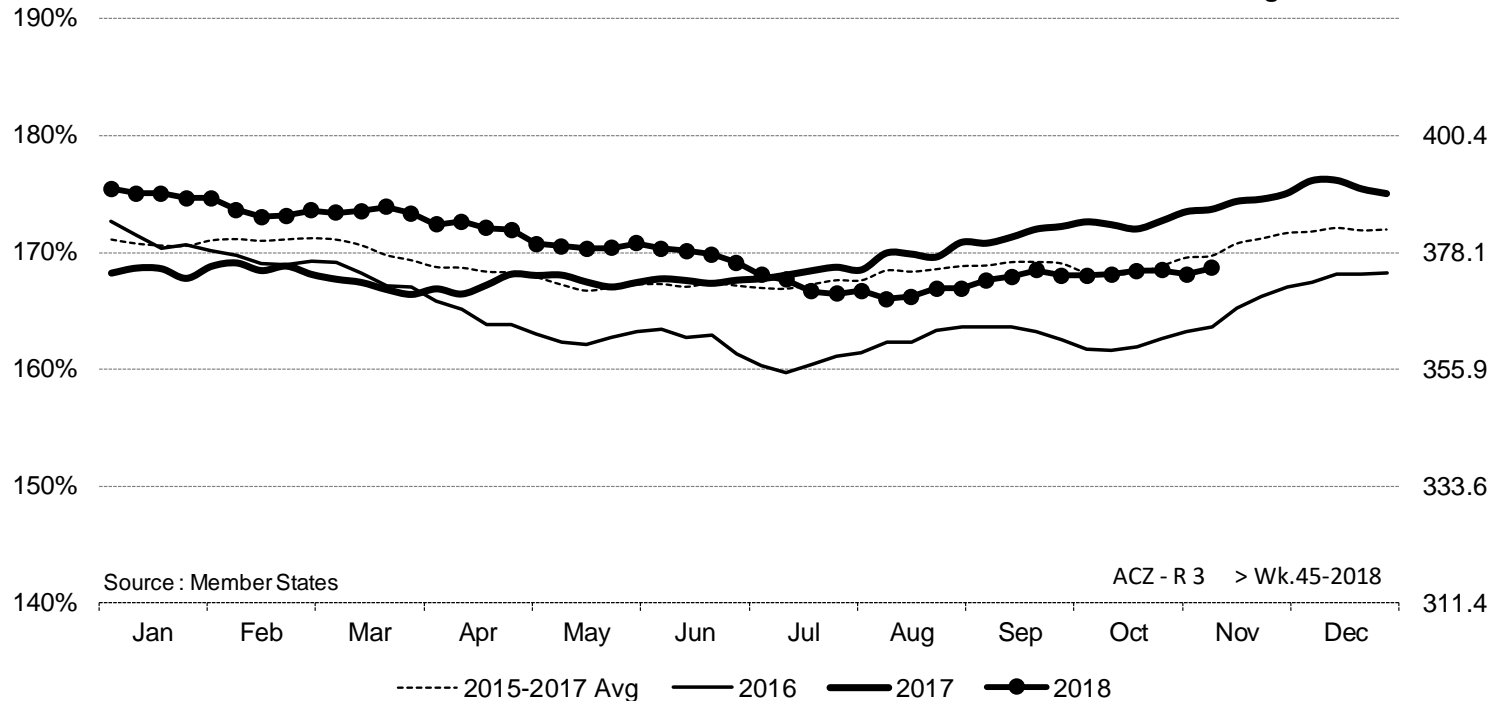
# PRICES CARCASSES

## EU EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.45-2018

% of Reference Price

€/100 kg cwe



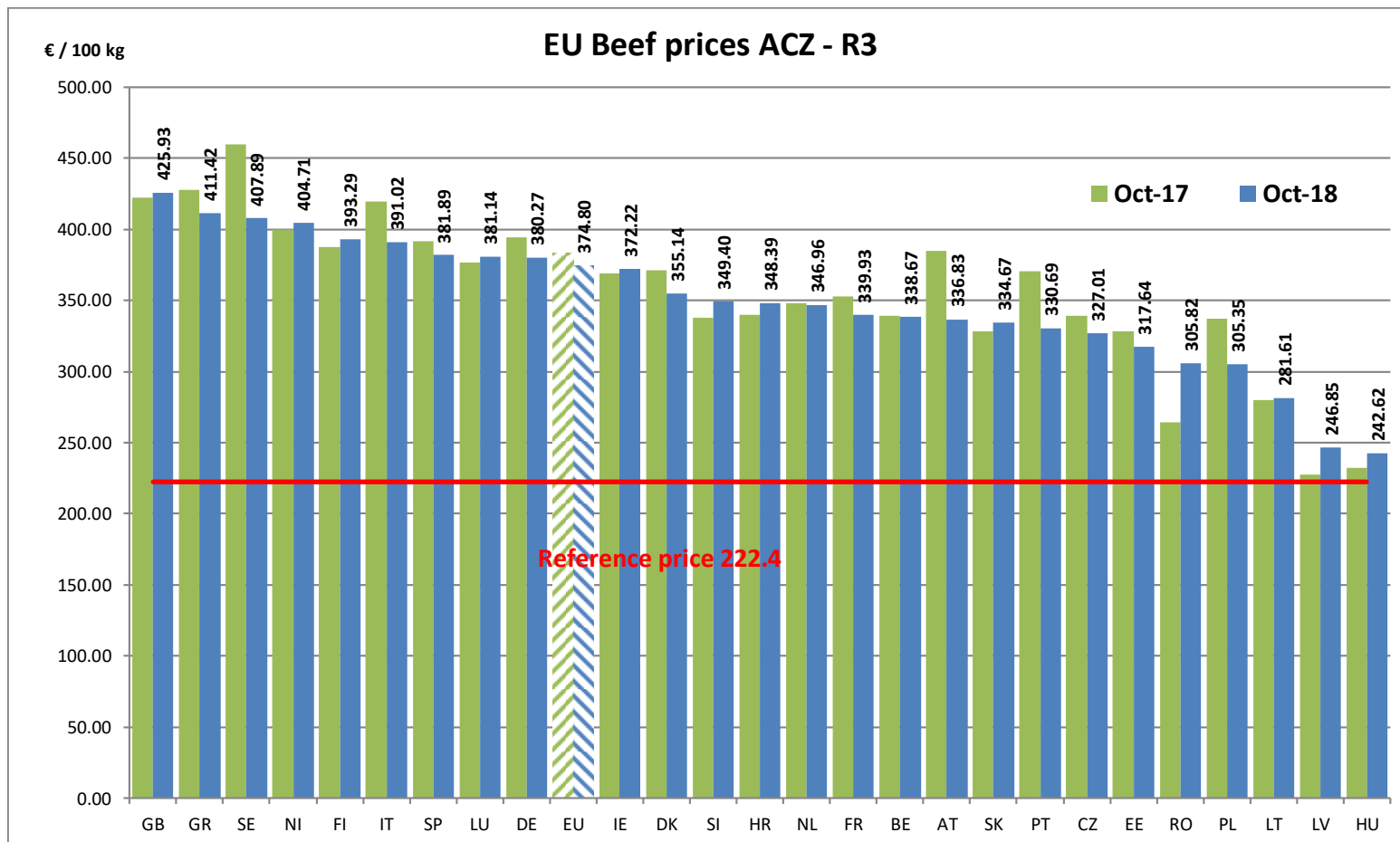
Price in week 45 : **375.18**  
 % change y/y : **- 2.9%**  
 % Ref. Price in wk 45 : **173.7%**

Average price in October 2018 : **374.19**  
 % change y/y : **- 2.5%**

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# PRICES CARCASSES

EU EVOLUTION  
A/C/Z.R3

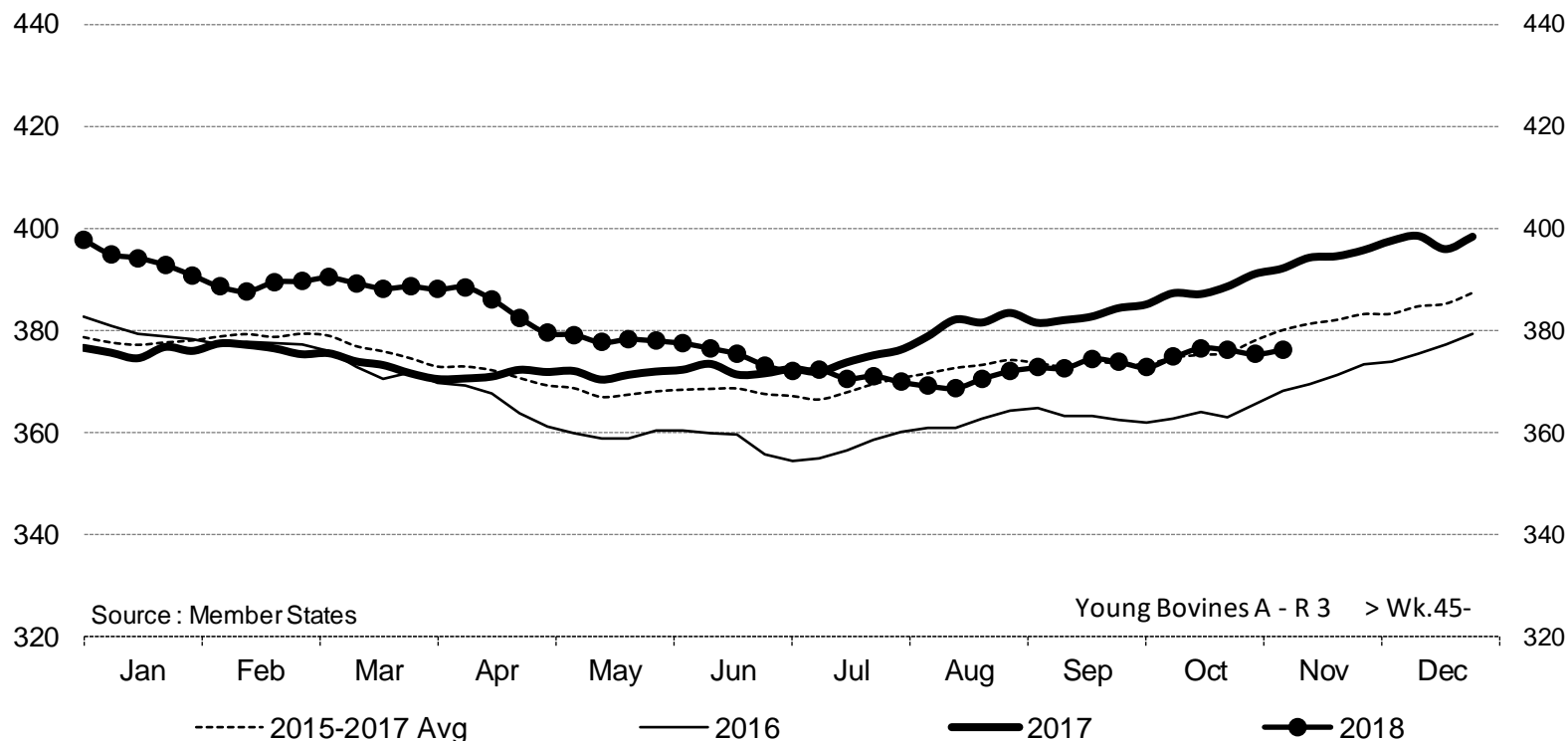


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# PRICES CARCASSES

# EU EVOLUTION YOUNG BULL - A.R3

Young Bovines A - R 3 > Wk.45-2018



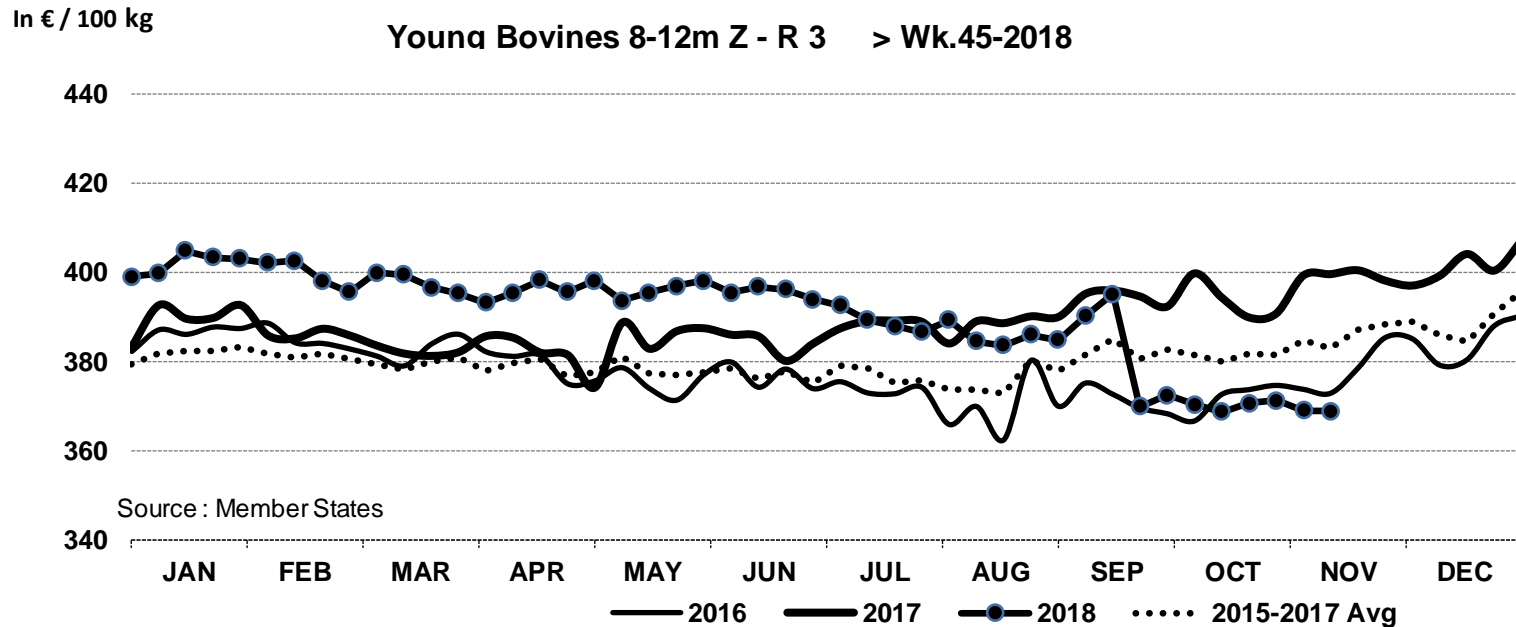
Price in week 45 : **376.28**  
% change y/y : **- 4.1%**

Average price in October 2018 : **375.13**  
% change y/y : **- 3.1%**

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# PRICES CARCASSES

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



Price in week 45 : **368.88**  
% change y/y : **- 7.7%**

15/10/2018

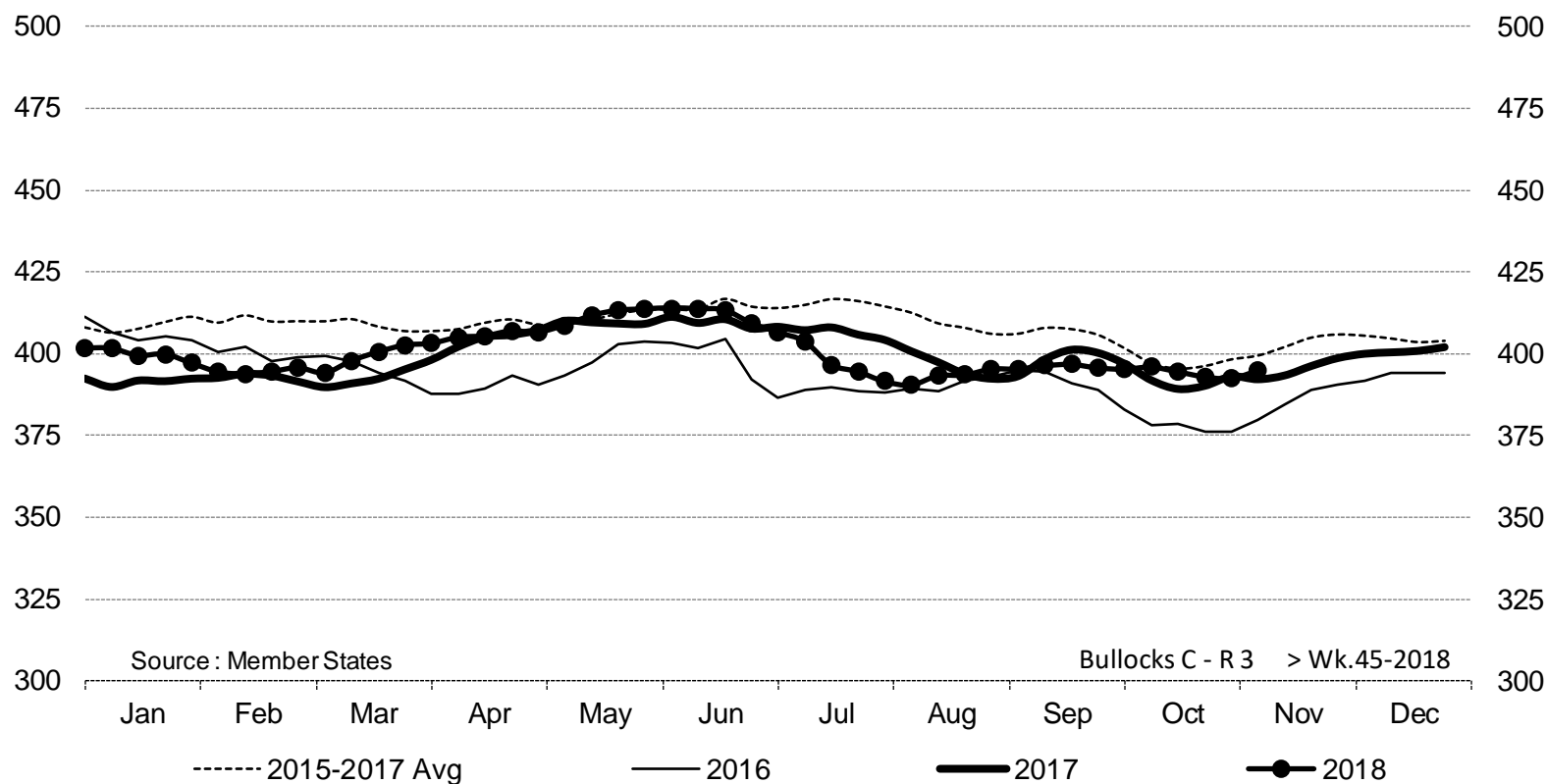
Average price in October 2018 : **370.09**  
% change y/y : **- 6.1%**

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# PRICES CARCASSES

# E.U. EVOLUTION STEER - C.R3

**Bullocks C - R 3 > Wk.45-2018**



Price in week 45 : **394.91**  
% change y/y : **+ 0.7%**

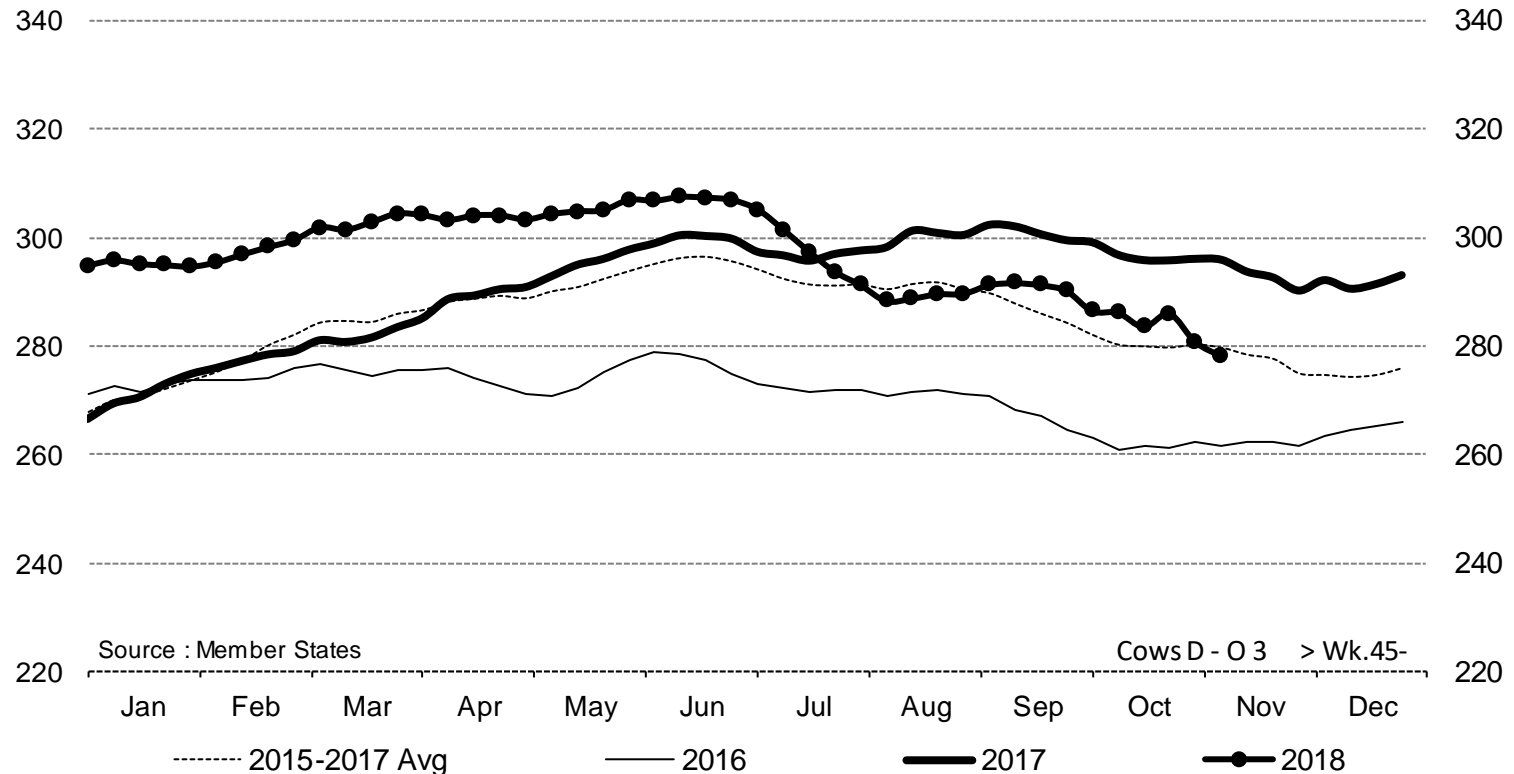
Average price in October 2018 : **394.48**  
% change y/y : **+ 0.5%**

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# PRICES CARCASSES

E.U. EVOLUTION  
COW – D.O3

Cows D - O 3 > Wk.45-2018



Price in week 45 : **278,27**  
% change y/y : **- 5,9%**

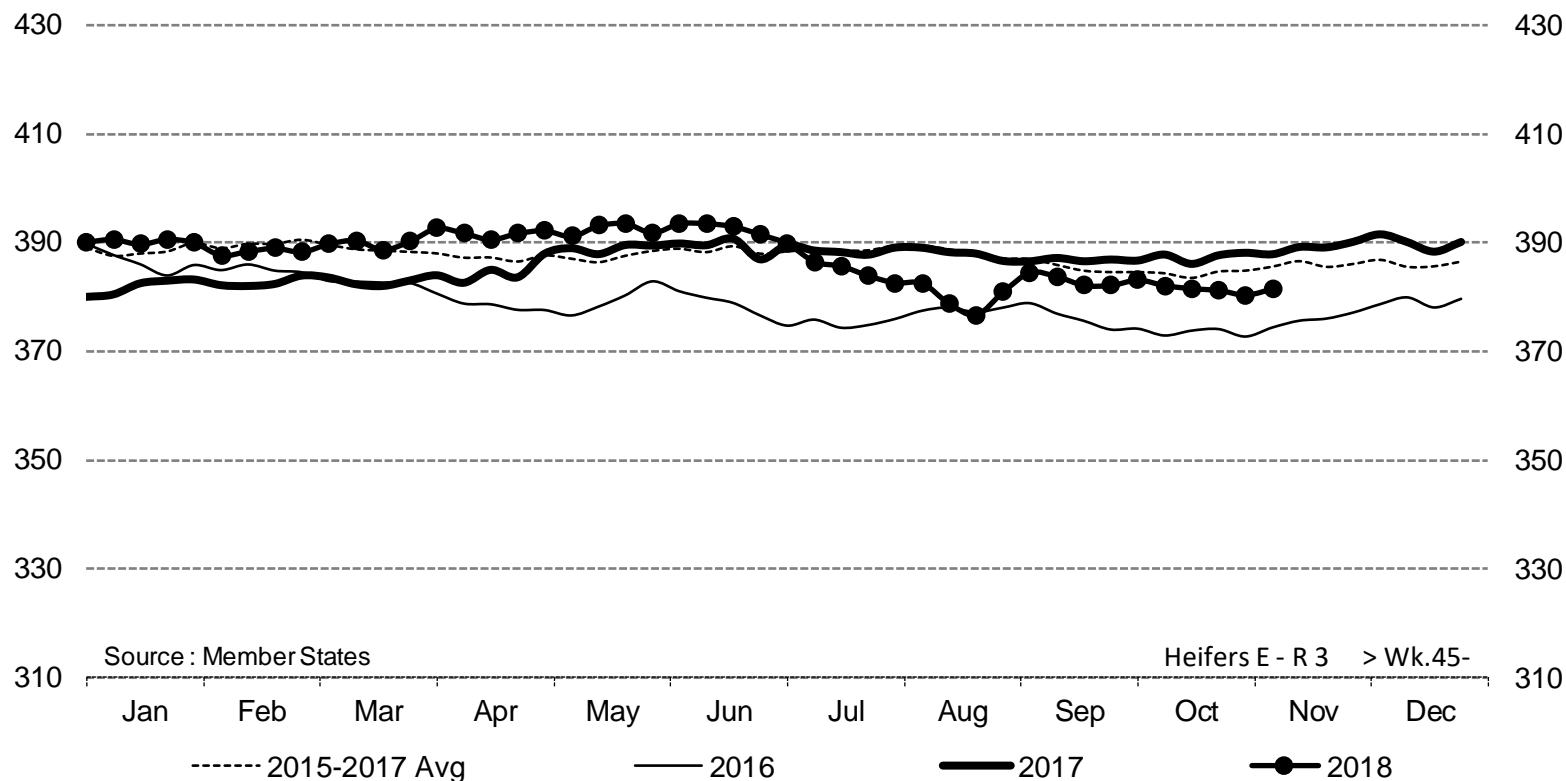
Average price in octobre 2018 : **285,12**  
% change y/y : **- 4,0%**

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# PRICES CARCASSES

## EU EVOLUTION HEIFER - E.R3

Heifers E - R 3 > Wk.45-2018



Price in week 45 : **381.52**

% change y/y : **- 1.6%**

Average price in October 2018 : **381.80**

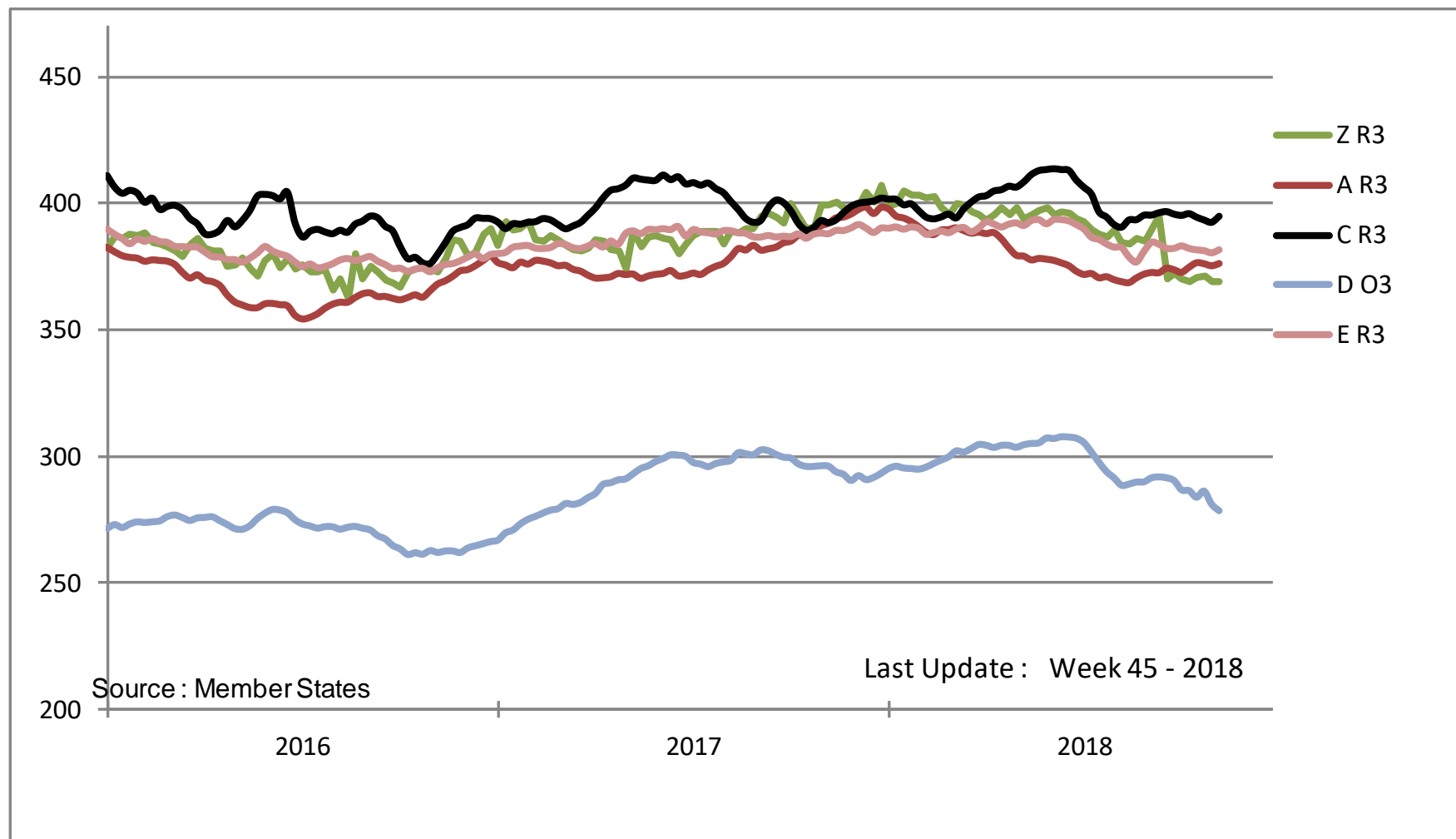
% change y/y : **- 1.4%**

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# PRICES CARCASSES

## EU EVOLUTION All CAT GLOBAL VIEW

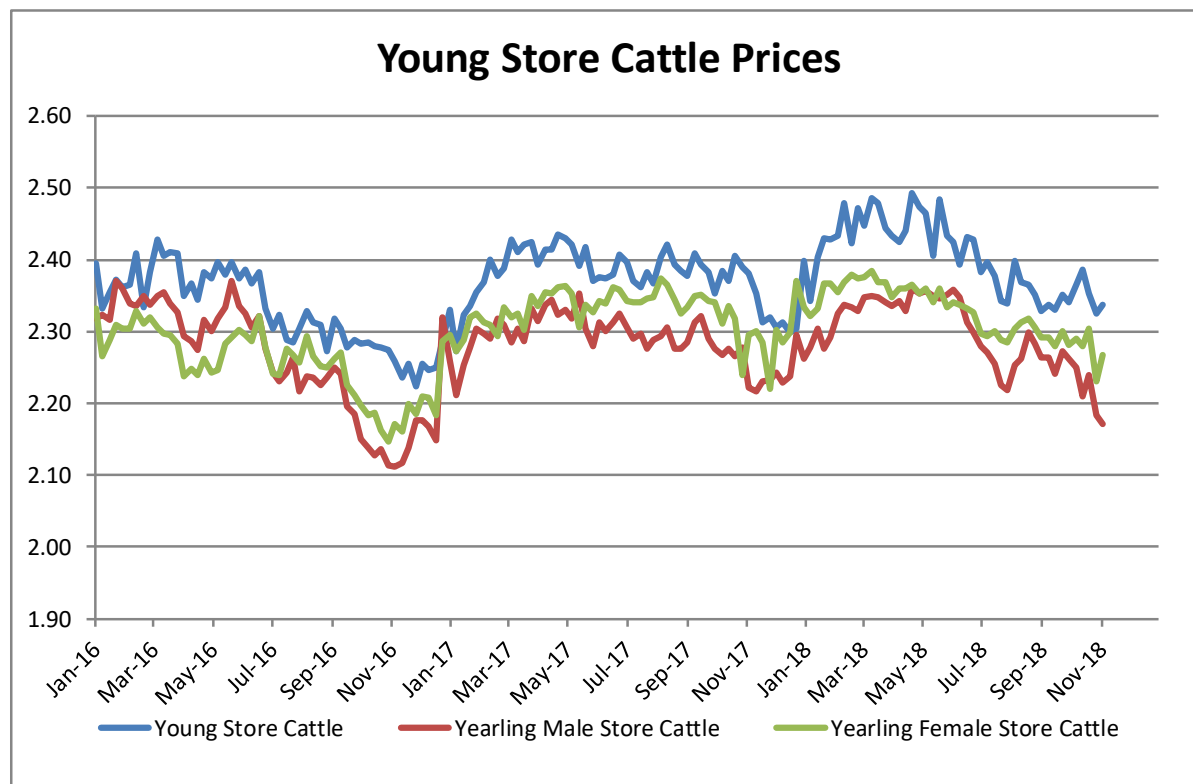


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# PRICES LIVE BOVINES

# EU EVOLUTION STORE CATTLE

Store cattle (€/100 kg live weight)



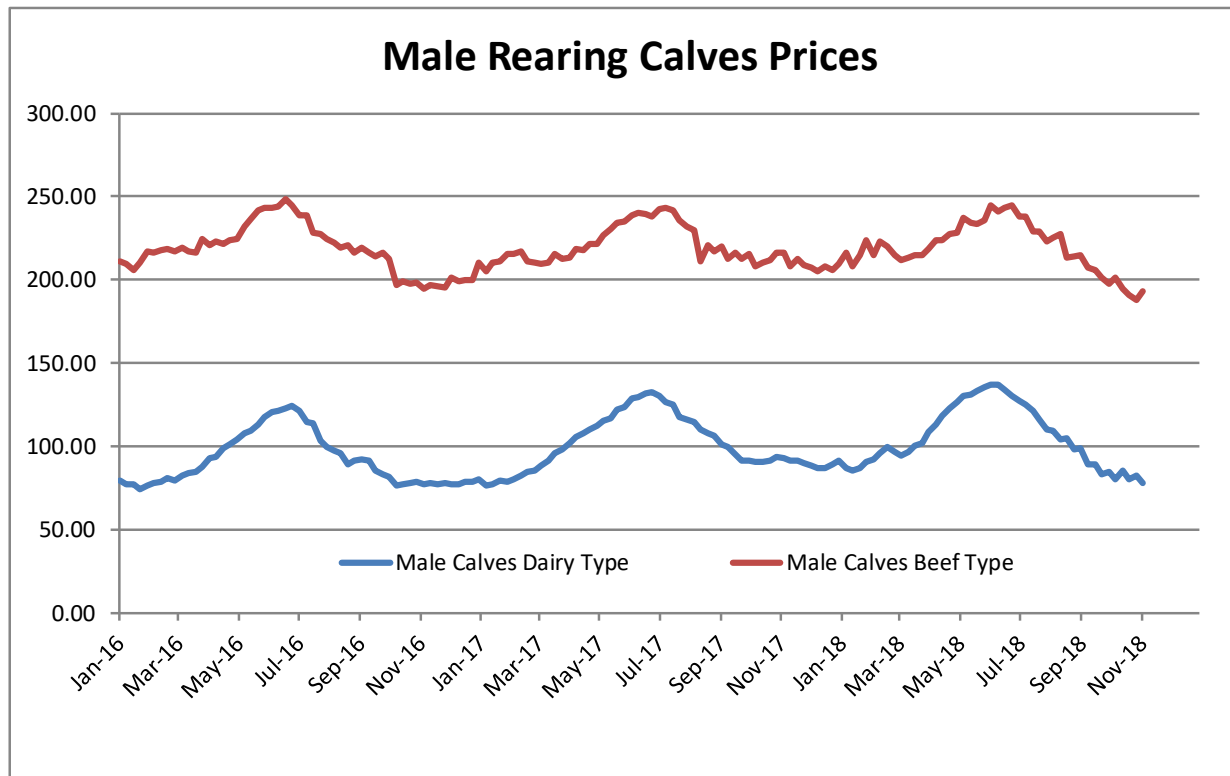
<b>Young Store Cattle Price in</b>	<b>Week 45</b>	<b>2.34</b>	<b>Yearling Male Store Cattle Price</b>	<b>2.17</b>
	Change y/y	-1.87%	Change y/y	-2.25%
<b>Yearling Female Store Cattle Price</b>		<b>2.27</b>		
	Change y/y	-1.20%		

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# 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 45 **193.23**  
Change y/y -10.69%

**Male Rearing Calves Dairy type**

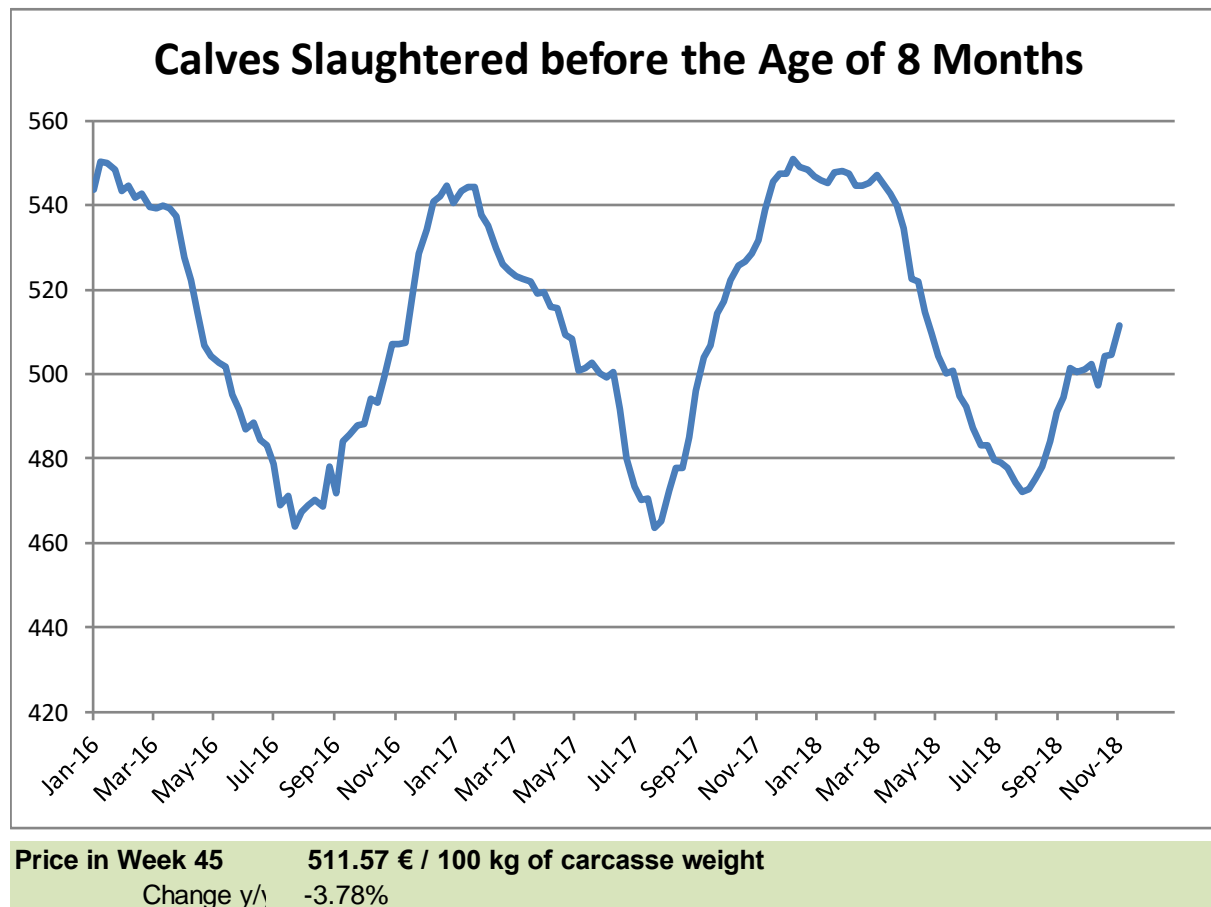
Price in Week 45 **77.84**  
Change y/y -16.03%

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# PRICES LIVE BOVINES

## EU EVOLUTION Butcher Calves

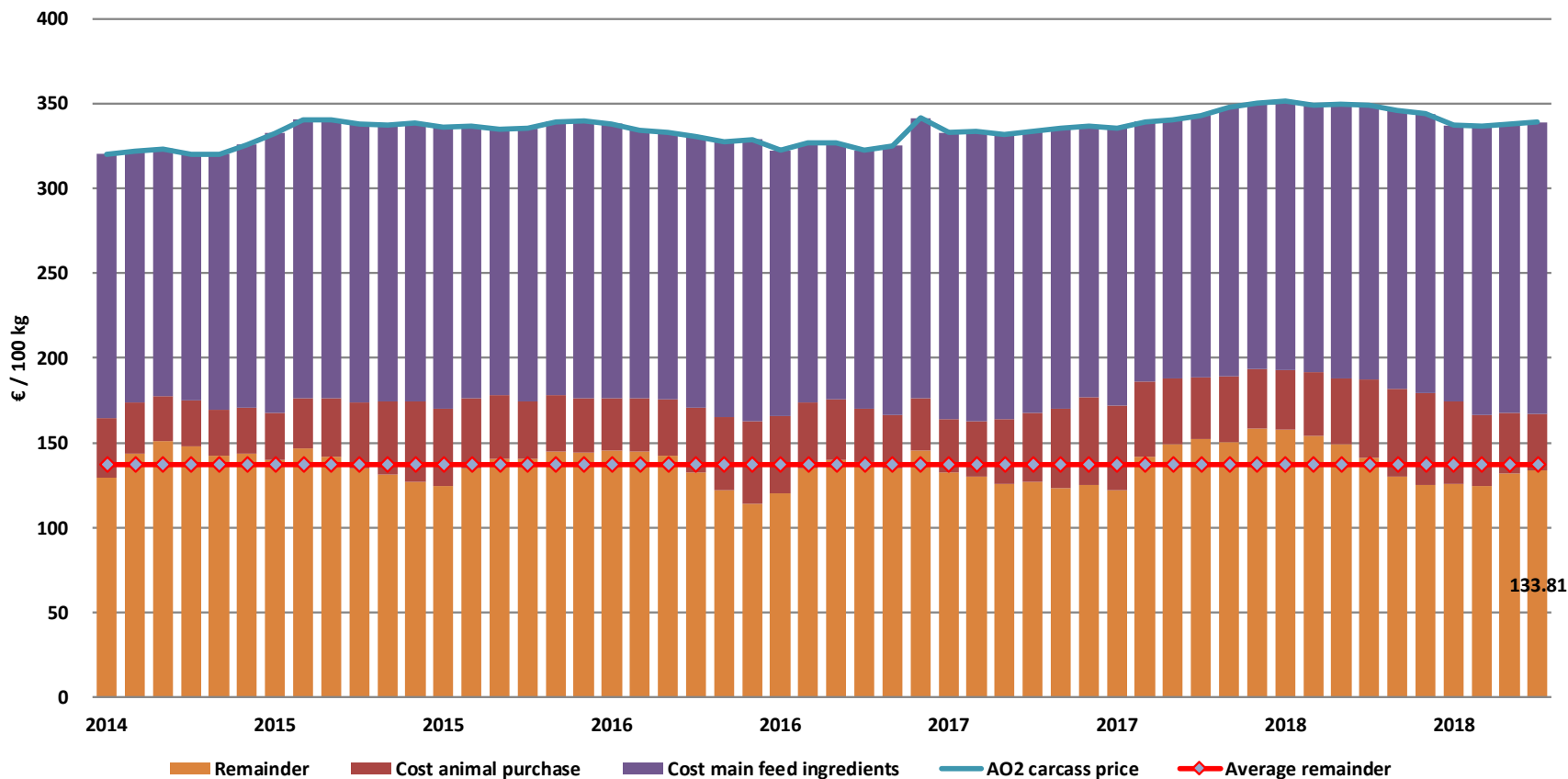
Calves slaughtered before the age of less than 8 months  
(€/100 kg cw)



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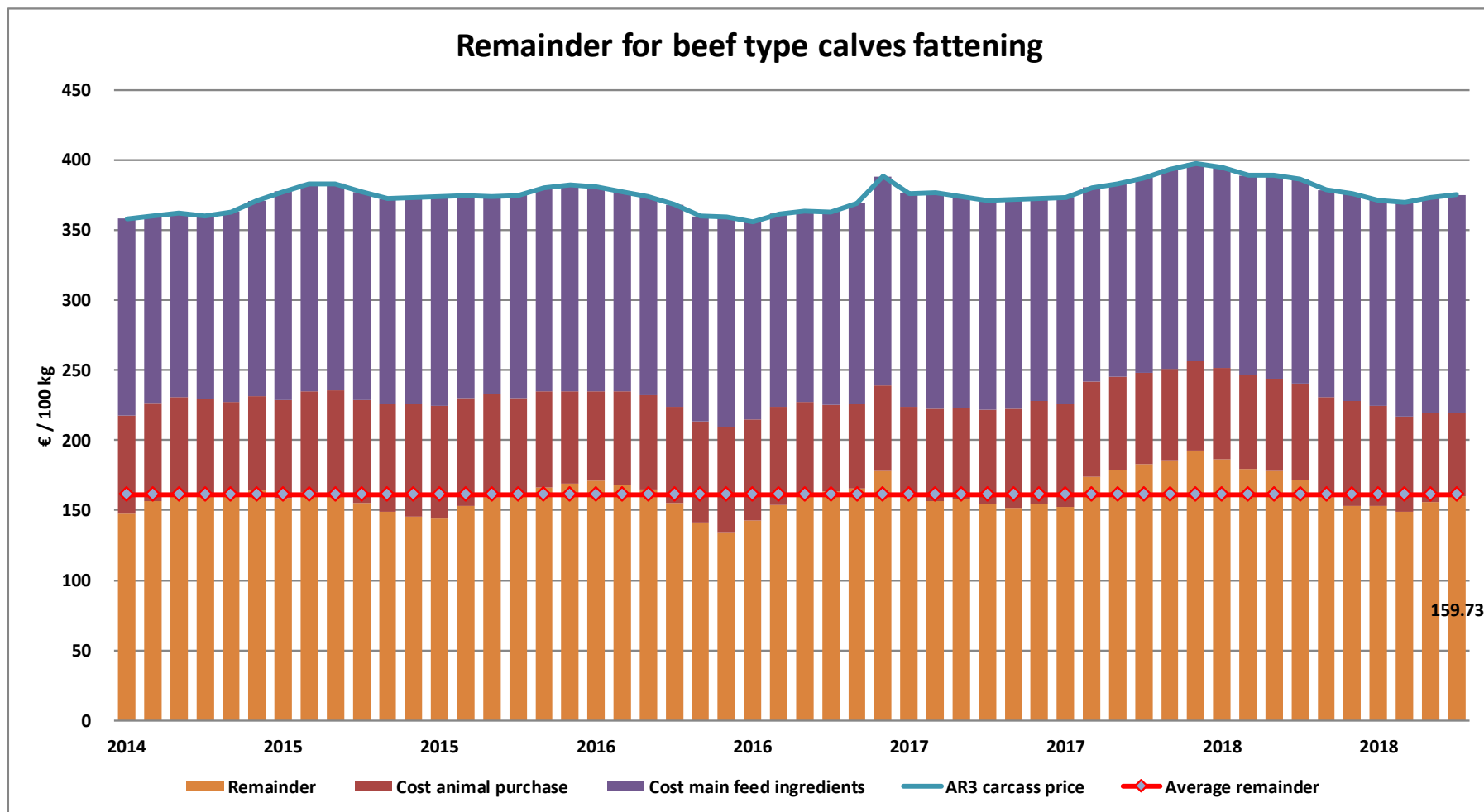
# REMAINDERS

Remainder for dairy calves fattening



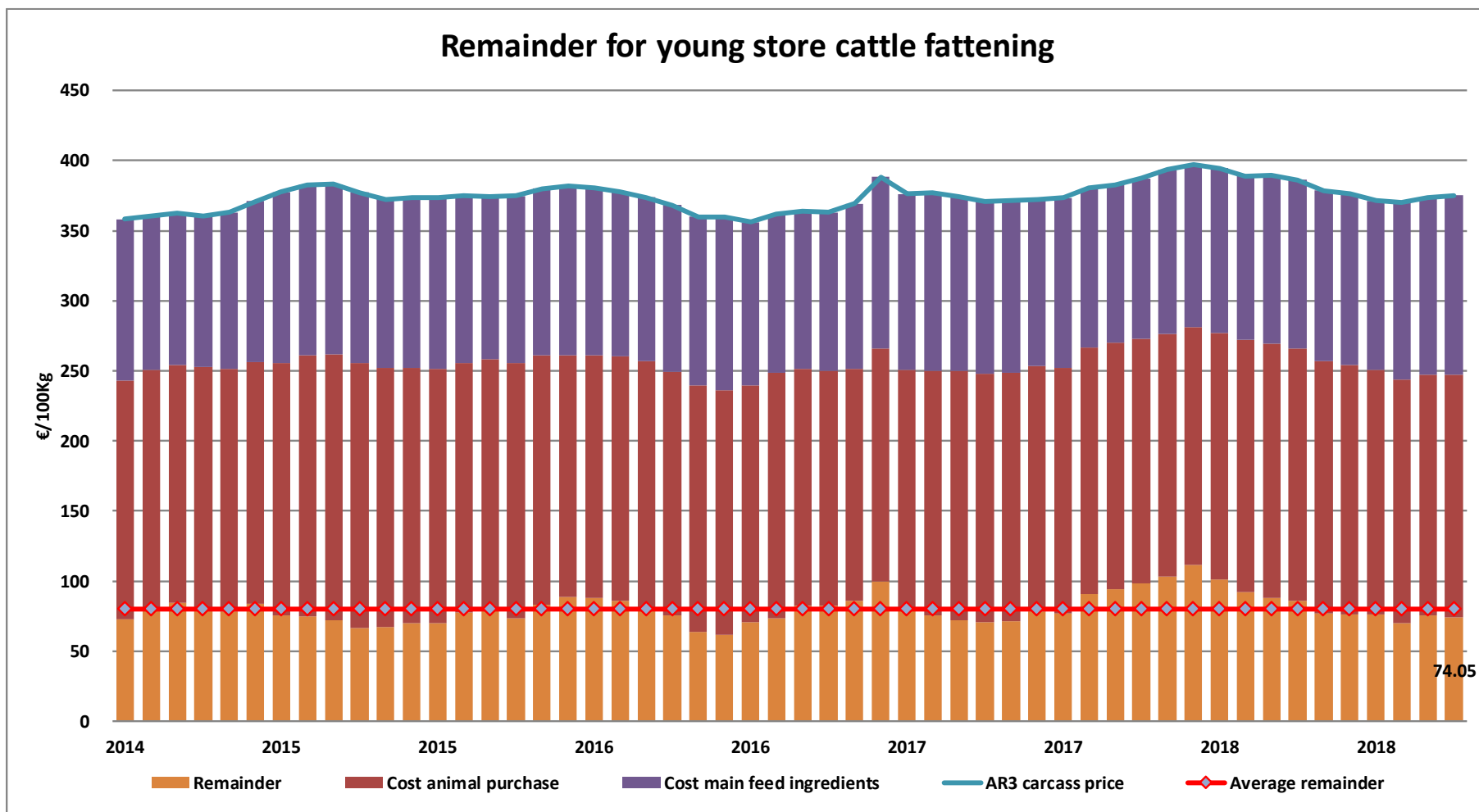
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# REMAINDERS



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# REMAINDERS



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# TRADE

# EU EXPORTS

## Beef & Live Animals

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

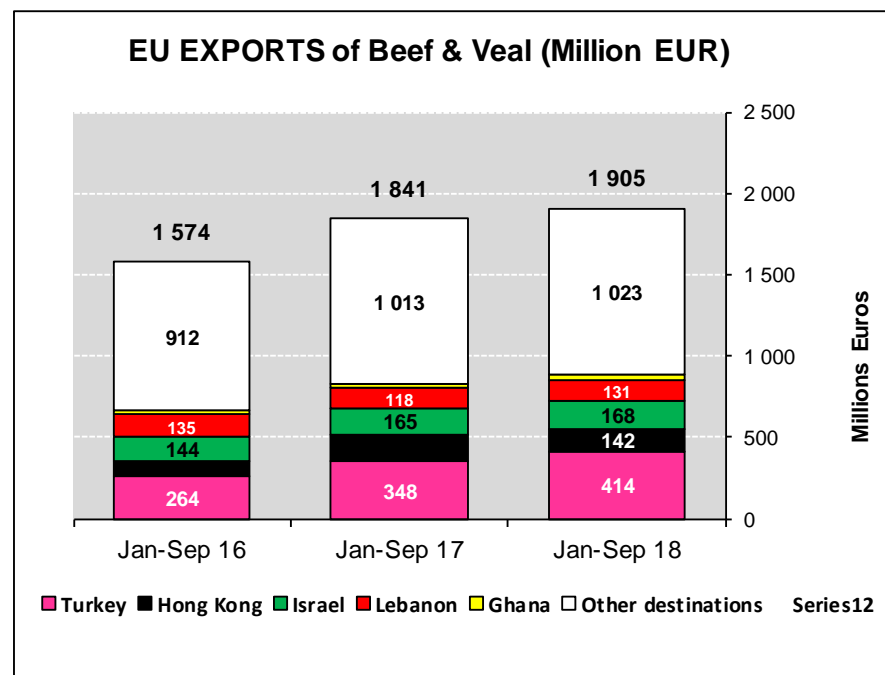
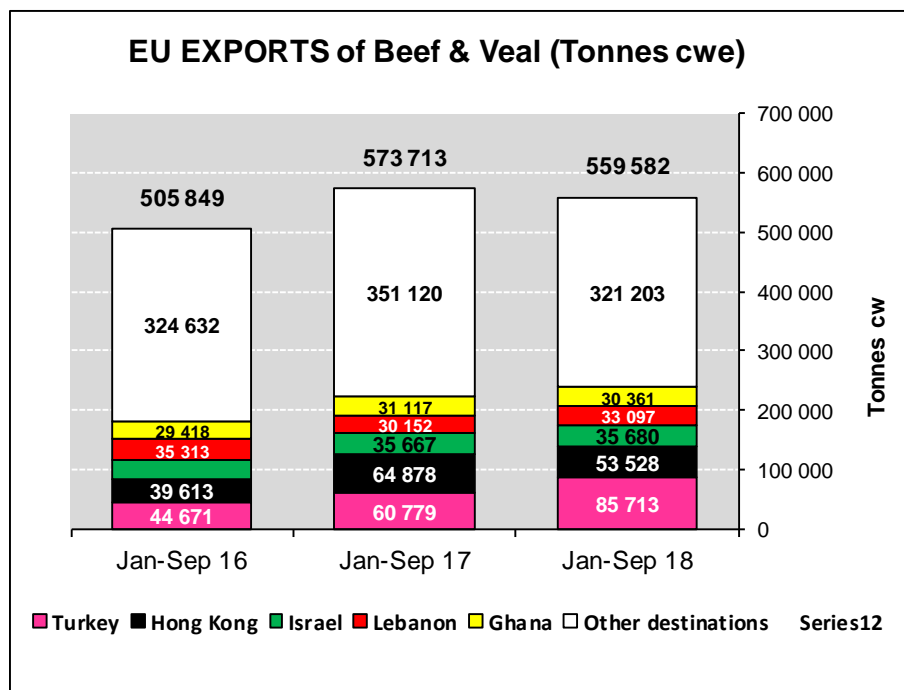
Destinations	2014		2015		2016		2017		Jan-Sep 18		Compared to Jan-Sep 17
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Turkey	8 098	1.4%	57 504	9.6%	71 030	10.0%	96 966	12.6%	85 713	15.3%	+ 41.0%
Hong Kong	65 222	11.6%	45 198	7.5%	58 499	8.3%	90 921	11.9%	53 528	9.6%	- 17.5%
Israel	8 353	1.5%	18 851	3.1%	41 535	5.9%	44 204	5.8%	35 680	6.4%	+ 0.0%
Lebanon	37 994	6.8%	50 263	8.4%	47 033	6.7%	40 256	5.2%	33 097	5.9%	+ 9.8%
Ghana	33 311	5.9%	39 225	6.6%	39 680	5.6%	41 308	5.4%	30 361	5.4%	- 2.4%
Bosnia-Herz.	34 104	6.1%	39 896	6.7%	38 935	5.5%	34 737	4.5%	27 974	5.0%	+ 5.5%
Ivory Coast	29 013	5.2%	36 018	6.0%	37 210	5.3%	38 890	5.1%	26 966	4.8%	- 6.6%
Algeria	18 499	3.3%	16 085	2.7%	25 004	3.5%	26 479	3.5%	26 705	4.8%	+ 29.1%
Libya	14 280	2.5%	19 691	3.3%	29 723	4.2%	26 489	3.5%	23 411	4.2%	+ 5.3%
Philippines	11 839	2.1%	13 052	2.2%	24 454	3.5%	38 679	5.0%	20 888	3.7%	- 30.4%
Switzerland	26 633	4.8%	26 019	4.3%	25 599	3.6%	27 375	3.6%	19 433	3.5%	- 6.2%
Russia	96 928	17.3%	13 546	2.3%	16 433	2.3%	23 136	3.0%	12 547	2.2%	- 23.1%
Chile	27	0.0%	50	0.0%	2 228	0.3%	8 961	1.2%	10 721	1.9%	+ 69.7%
South Africa	1 325	0.2%	7 508	1.3%	7 361	1.0%	7 569	1.0%	10 398	1.9%	+ 69.1%
Angola	14 587	2.6%	9 670	1.6%	13 550	1.9%	11 184	1.5%	10 108	1.8%	+ 13.3%
Morocco	7 652	1.4%	4 703	0.8%	7 517	1.1%	10 015	1.3%	7 931	1.4%	+ 16.0%
For.JRep.Mac	11 370	2.0%	12 561	2.1%	11 804	1.7%	11 563	1.5%	7 665	1.4%	- 13.2%
Other Destinations	140 779	25.1%	188 880	31.5%	209 387	29.6%	188 369	24.6%	116 455	20.8%	
Extra-EU	560 014		598 718		706 980		767 102		559 582		
% change			+ 7%		+ 18%		+ 9%		- 2.5%		



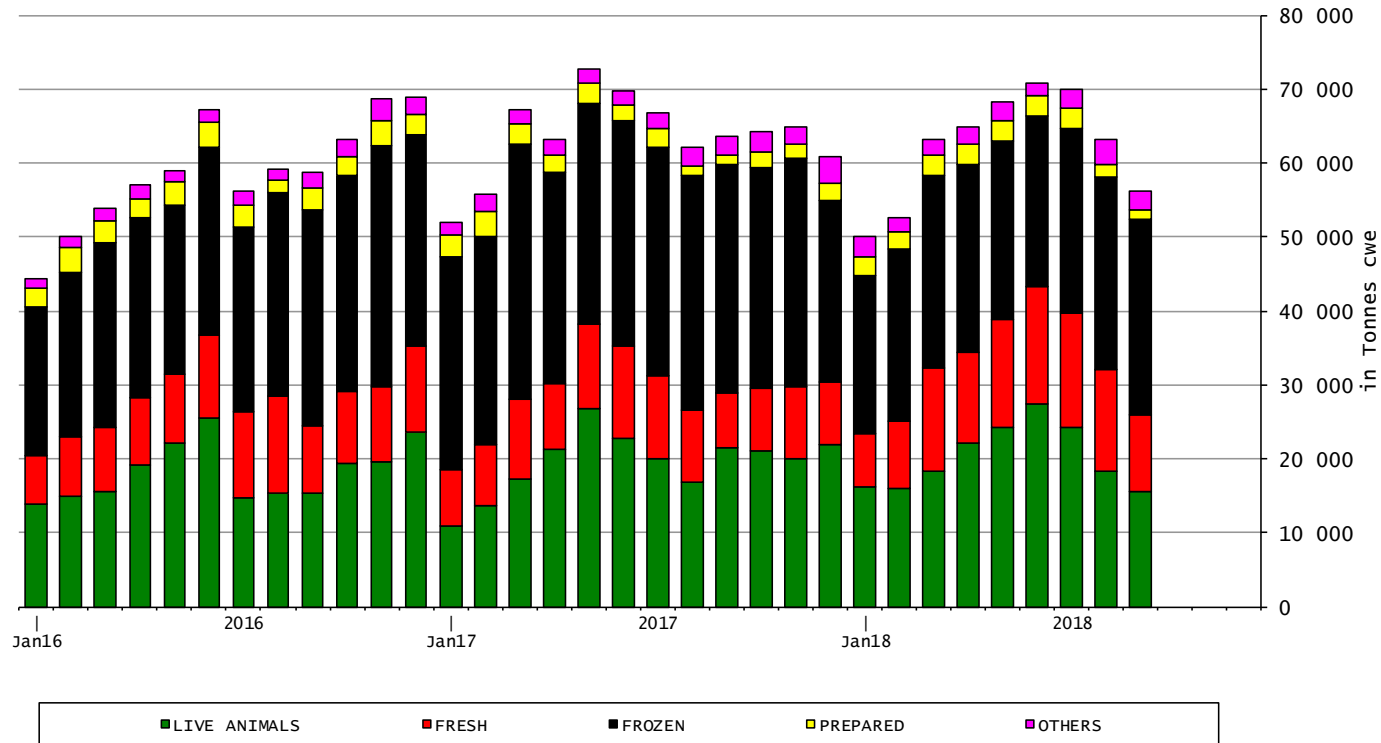
### EU exports of beef: Trade figures (COMEXT – tonnes cwe)

Destinations	2014		2015		2016		2017		Jan-Sep 18		Compared to Jan-Sep 17
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	28 573	8.2%	65 112	14.6%	45 198	10.8%	58 416	12.1%	53 528	14.2%	- 17.5%
Turkey	559	0.2%	1 280	0.3%	9 482	2.3%	10 751	2.2%	33 761	9.0%	+++
Ghana	40 878	11.8%	33 255	7.5%	37 364	8.9%	35 340	7.3%	30 361	8.1%	- 2.4%
Ivory Coast	21 619	6.2%	28 839	6.5%	35 740	8.5%	36 713	7.6%	26 966	7.2%	- 6.5%
Bosnia-Herz.	21 870	6.3%	31 821	7.1%	36 593	8.7%	36 850	7.6%	26 225	7.0%	+ 5.3%
Philippines	2 534	0.7%	11 630	2.6%	13 053	3.1%	24 247	5.0%	20 888	5.5%	- 30.4%
Switzerland	25 817	7.4%	25 730	5.8%	25 009	6.0%	24 435	5.1%	18 609	4.9%	- 6.1%
Israel	4 224	1.2%	3 855	0.9%	6 087	1.5%	15 137	3.1%	16 663	4.4%	+ 9.6%
Chile	1	0.0%	27	0.0%	50	0.0%	2 228	0.5%	10 721	2.8%	+ 69.7%
South Africa	3 339	1.0%	1 325	0.3%	7 481	1.8%	7 361	1.5%	10 398	2.8%	+ 69.1%
Angola	10 589	3.0%	14 587	3.3%	9 643	2.3%	13 549	2.8%	10 108	2.7%	+ 13.3%
Algeria	3 135	0.9%	4 227	0.9%	6 662	1.6%	10 726	2.2%	9 825	2.6%	- 17.3%
For.JRep.Mac	10 315	3.0%	10 994	2.5%	12 375	3.0%	11 451	2.4%	7 618	2.0%	- 12.6%
Norway	10 217	2.9%	7 872	1.8%	19 122	4.6%	18 315	3.8%	6 826	1.8%	- 43.8%
Ukraine	2 870	0.8%	2 498	0.6%	2 747	0.7%	7 094	1.5%	6 797	1.8%	+ 30.5%
Vietnam	3 175	0.9%	6 410	1.4%	11 627	2.8%	22 252	4.6%	6 055	1.6%	- 49.4%
China	7 228	2.1%	8 242	1.9%	6 027	1.4%	10 804	2.2%	4 857	1.3%	- 1.4%
Other Destinations	150 312	43.3%	187 568	42.1%	134 124	32.1%	136 176	28.3%	76 567	20.3%	
Extra-EU	347 252		445 272		418 383		481 846		376 773		
% change			+ 28%		- 6%		+ 15%		- 6.3%		

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



EU-28 Exports of BEEF products

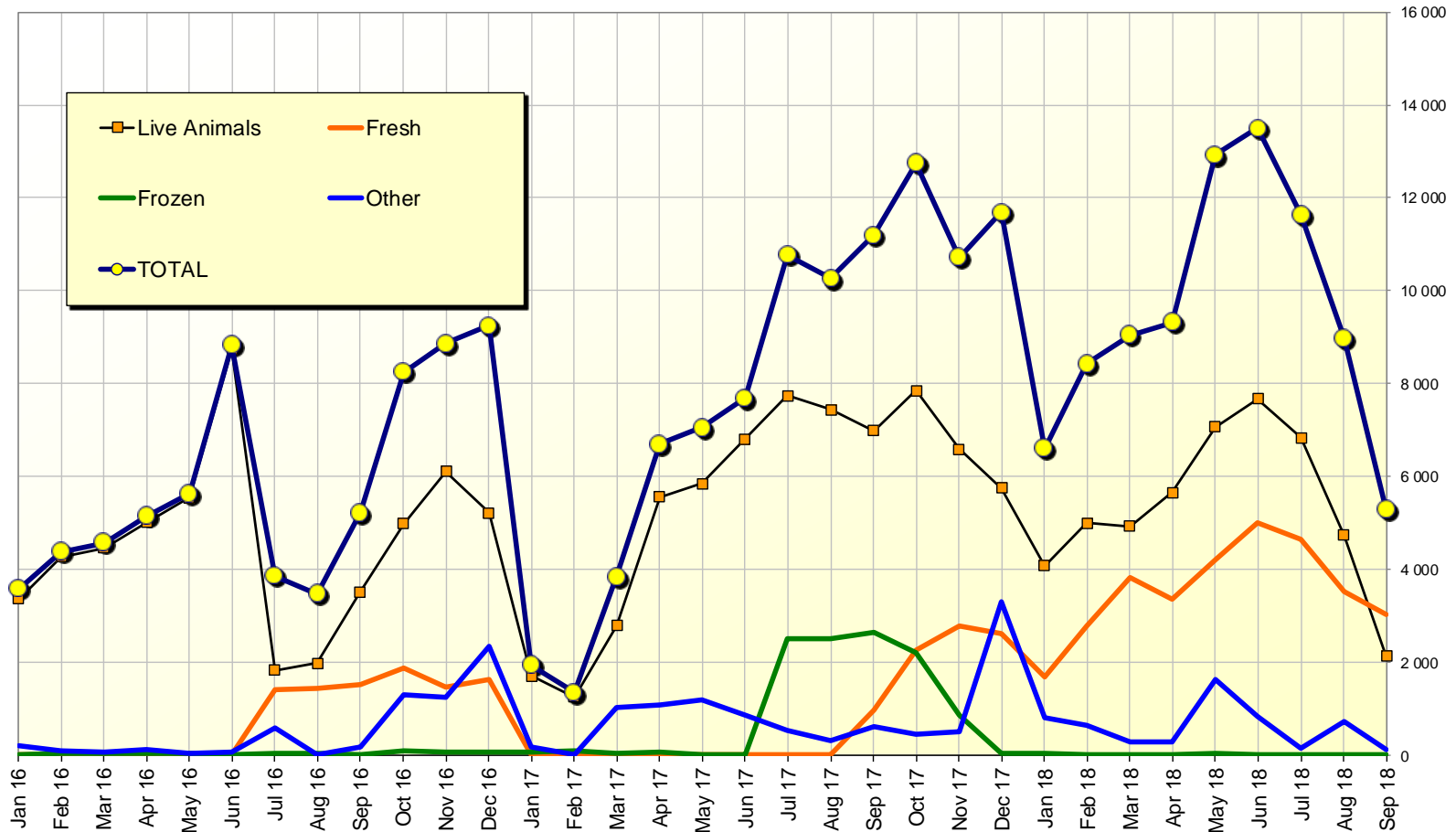


# TRADE

# EU EXPORTS

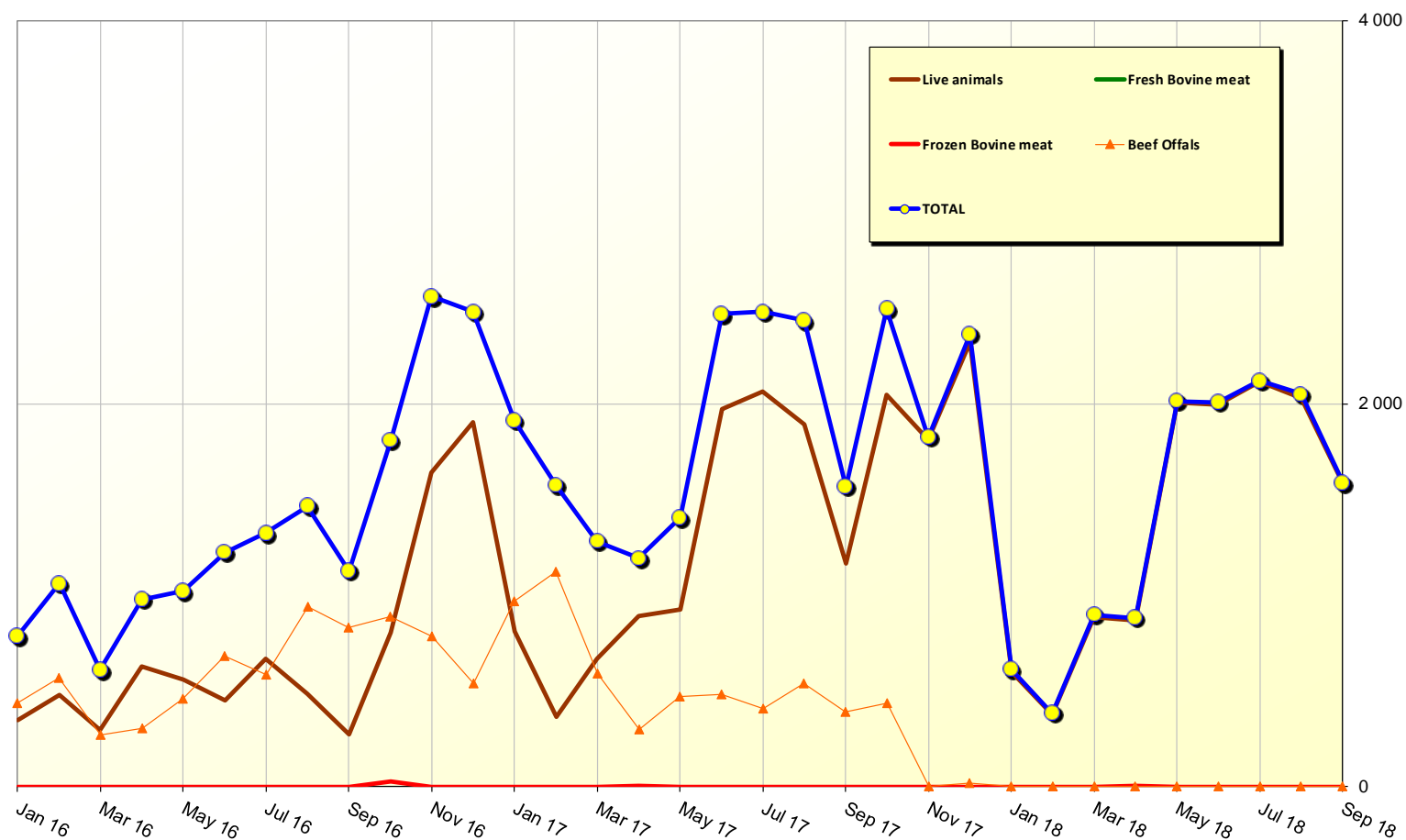
## Beef to TURKEY

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



23 November 2018

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

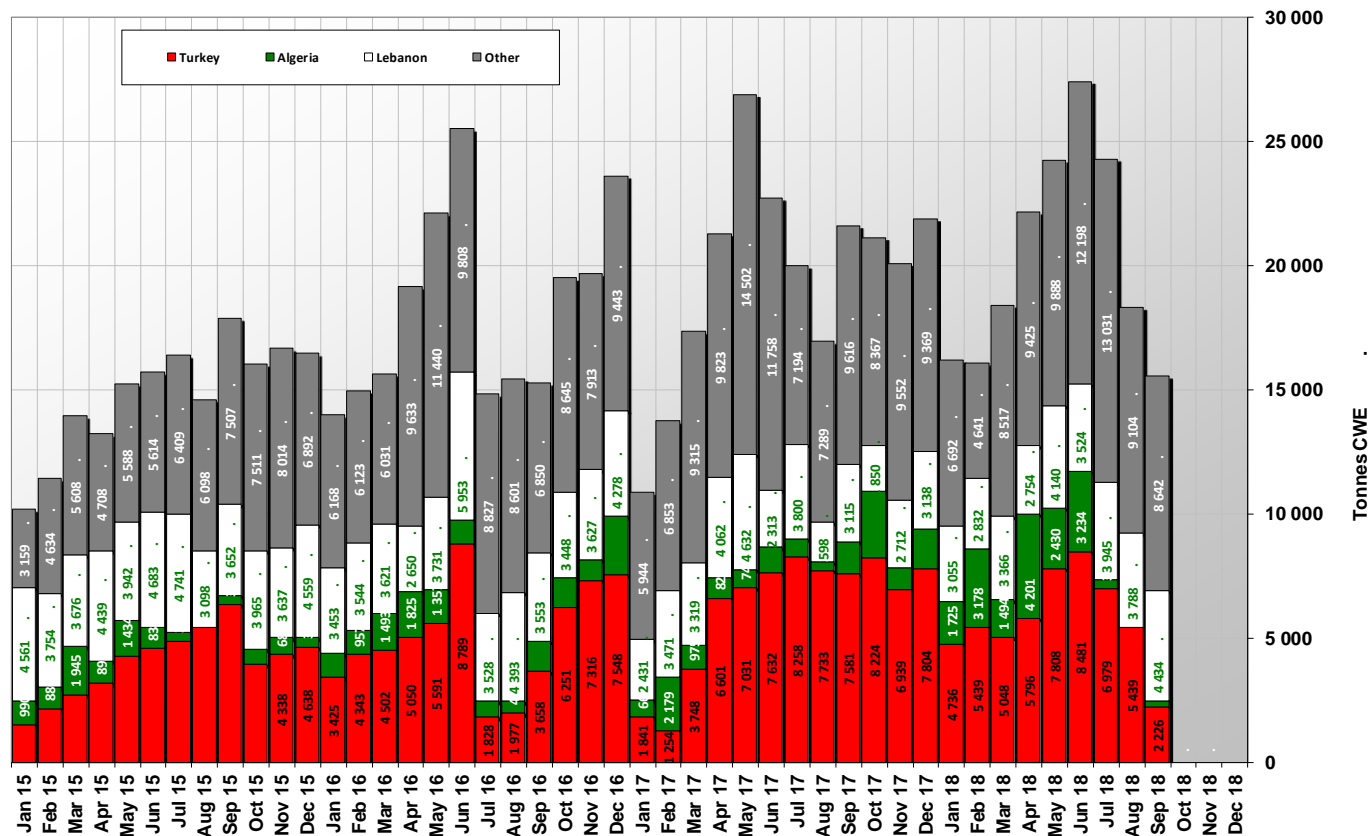


23 November 2018

# TRADE

# EU EXPORTS Live Animals

**EU-28 Exports of LIVE Bovine Animals**  
(Source COMEXT - Tonnes cwe)

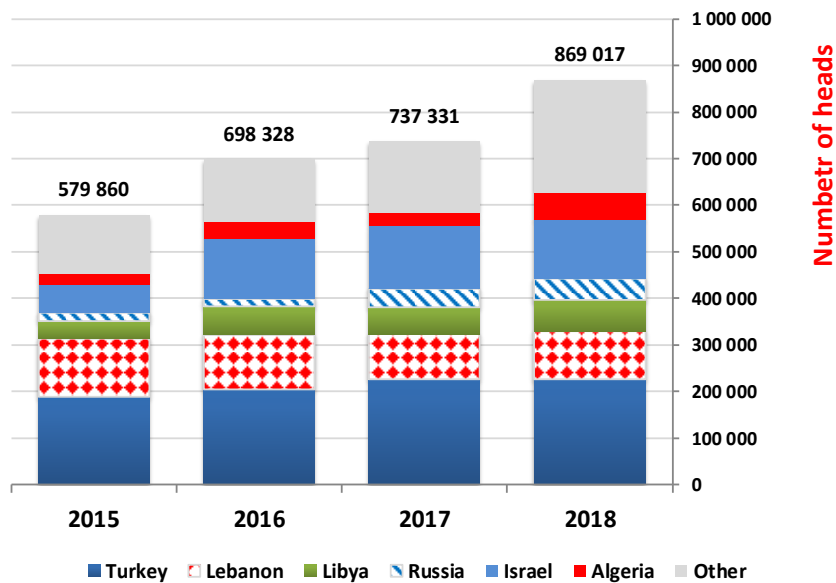


23 November 2018

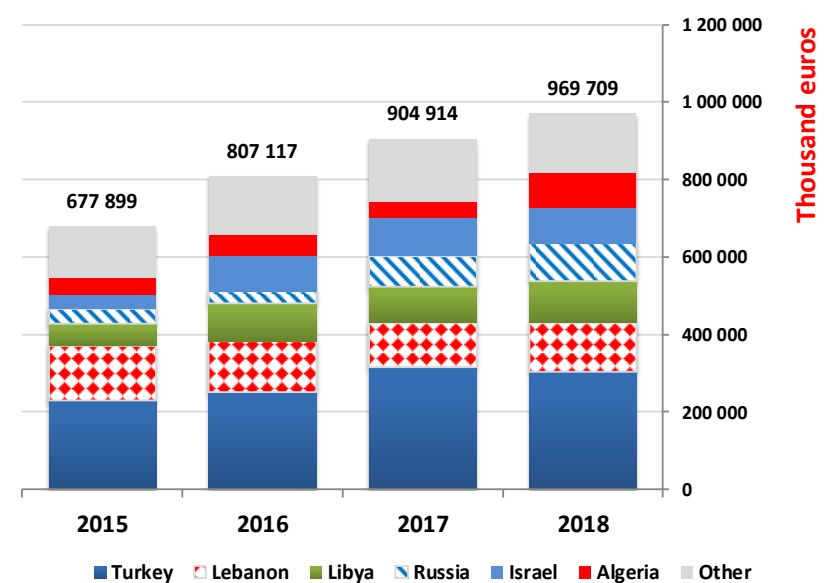
# TRADE

# EU EXPORTS Live Animals

EU Exports of BEEF live animals by partner for the period Jan-sep 2018



EU Exports of BEEF live animals by partner for the period Jan-sep 2018



# TRADE

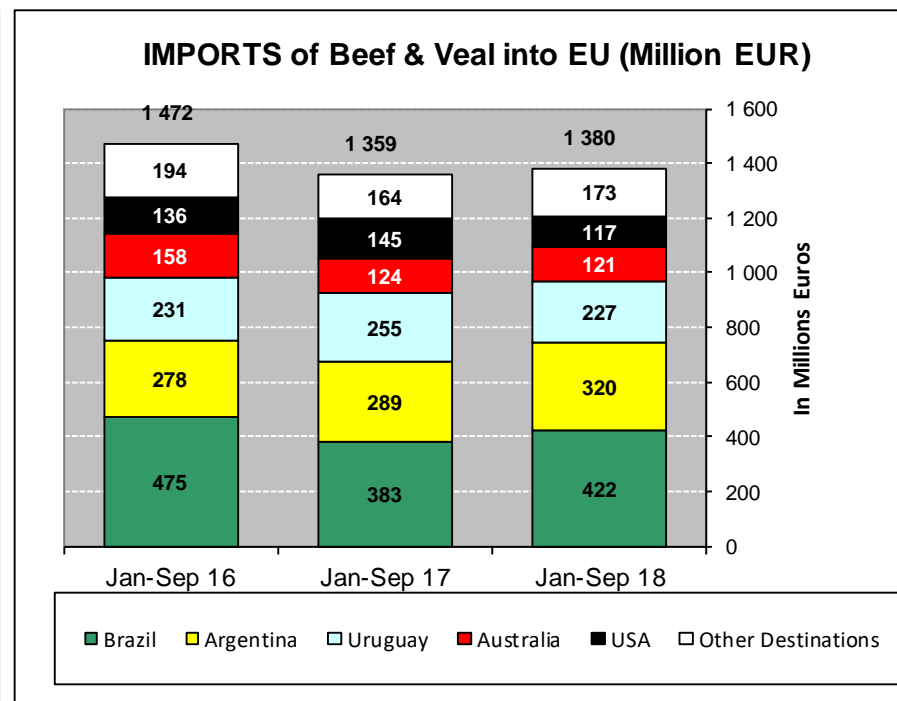
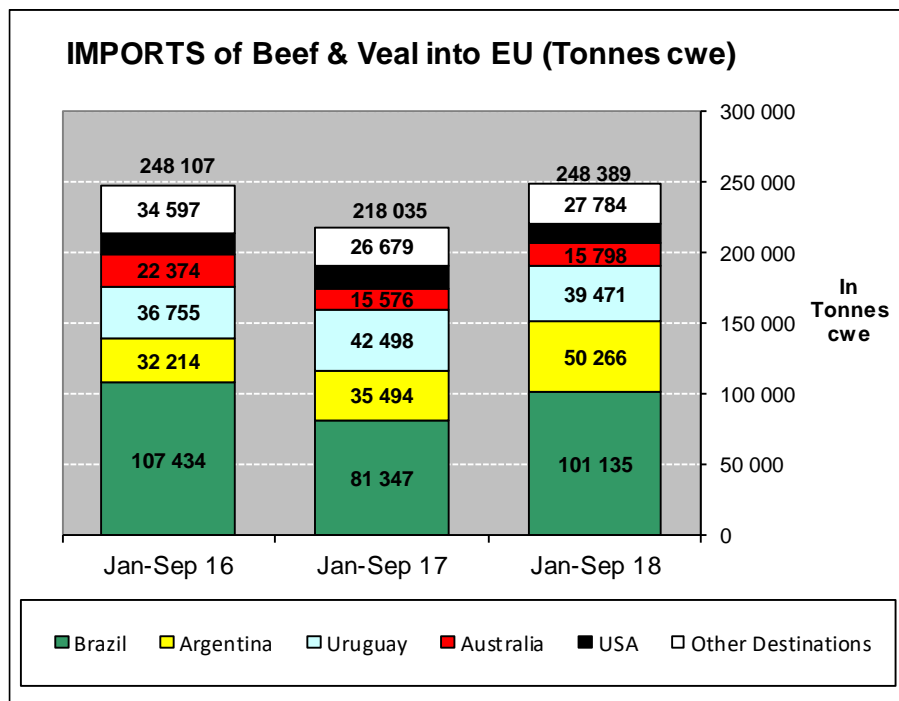
## EU IMPORTS Beef & Live Animals

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

Origins	2014		2015		2016		2017		Jan-Sep 18		Compared to Jan-Sep 17
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	144 259	43.4%	136 858	42.4%	140 306	42.0%	115 450	37.7%	101 135	40.7%	+ 24.3%
Argentina	42 074	12.7%	42 149	13.0%	43 558	13.0%	49 916	16.3%	50 266	20.2%	+ 41.6%
Uruguay	49 043	14.8%	46 287	14.3%	56 703	17.0%	58 111	19.0%	39 471	15.9%	- 7.1%
Australia	32 653	9.8%	30 884	9.6%	27 794	8.3%	21 989	7.2%	15 798	6.4%	+ 1.4%
USA	23 234	7.0%	24 132	7.5%	20 482	6.1%	21 591	7.0%	13 936	5.6%	- 15.2%
New Zealand	14 432	4.3%	11 380	3.5%	9 906	3.0%	8 099	2.6%	6 711	2.7%	+ 6.9%
Paraguay	0	0.0%	1 915	0.6%	5 947	1.8%	6 914	2.3%	4 826	1.9%	+ 1.6%
Botswana	6 424	1.9%	9 258	2.9%	9 382	2.8%	7 718	2.5%	4 605	1.9%	+ 16.6%
Namibia	9 994	3.0%	12 112	3.7%	10 685	3.2%	7 705	2.5%	4 511	1.8%	- 18.7%
Switzerland	5 456	1.6%	5 090	1.6%	5 500	1.6%	5 141	1.7%	3 876	1.6%	+ 7.0%
Serbia	425	0.1%	439	0.1%	557	0.2%	575	0.2%	948	0.4%	+++
Canada	780	0.2%	428	0.1%	421	0.1%	514	0.2%	621	0.2%	+ 67.6%
Japan	100	0.0%	359	0.1%	578	0.2%	698	0.2%	536	0.2%	+ 10.4%
Other Origins	3 488	1.0%	1 810	0.6%	2 063	0.6%	1 890	0.6%	1 150	0.5%	
Extra-EU	332 362		323 099		333 884		306 313		248 389		
% change			- 3%		+ 3%		- 8%		+ 13.9%		



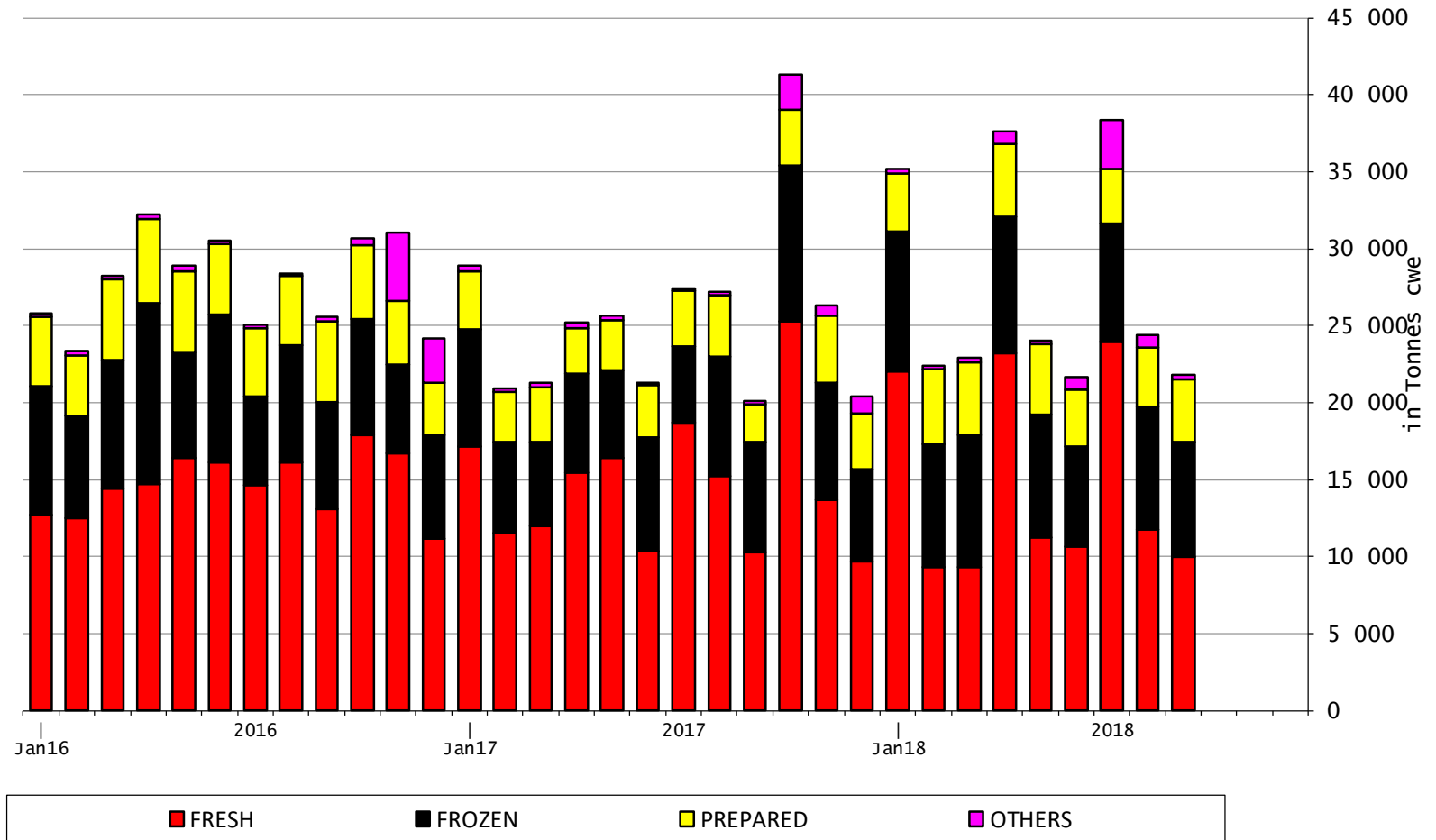
## EU imports of beef and live animals (2): Trade figures (COMEXT)



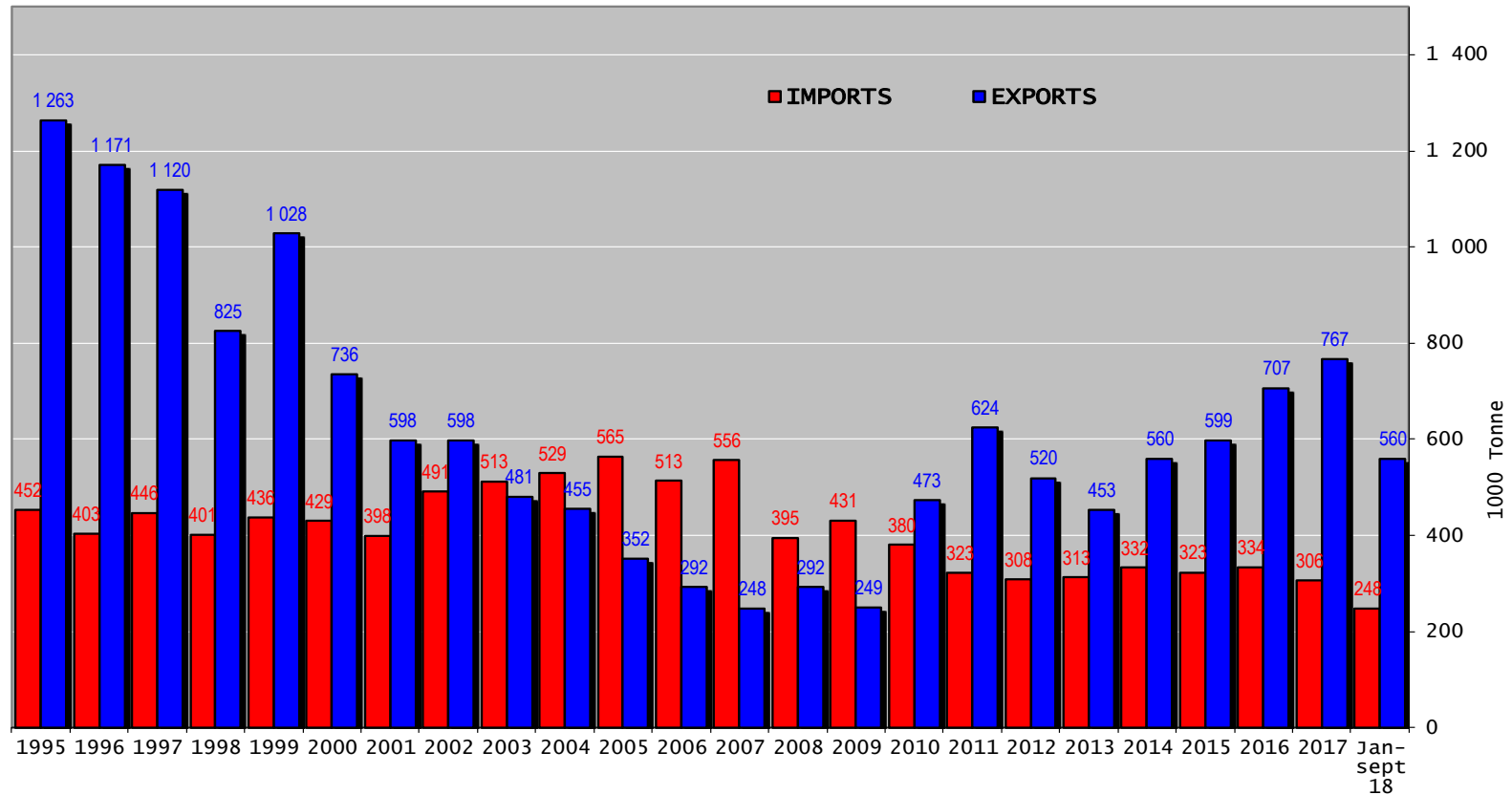
# TRADE

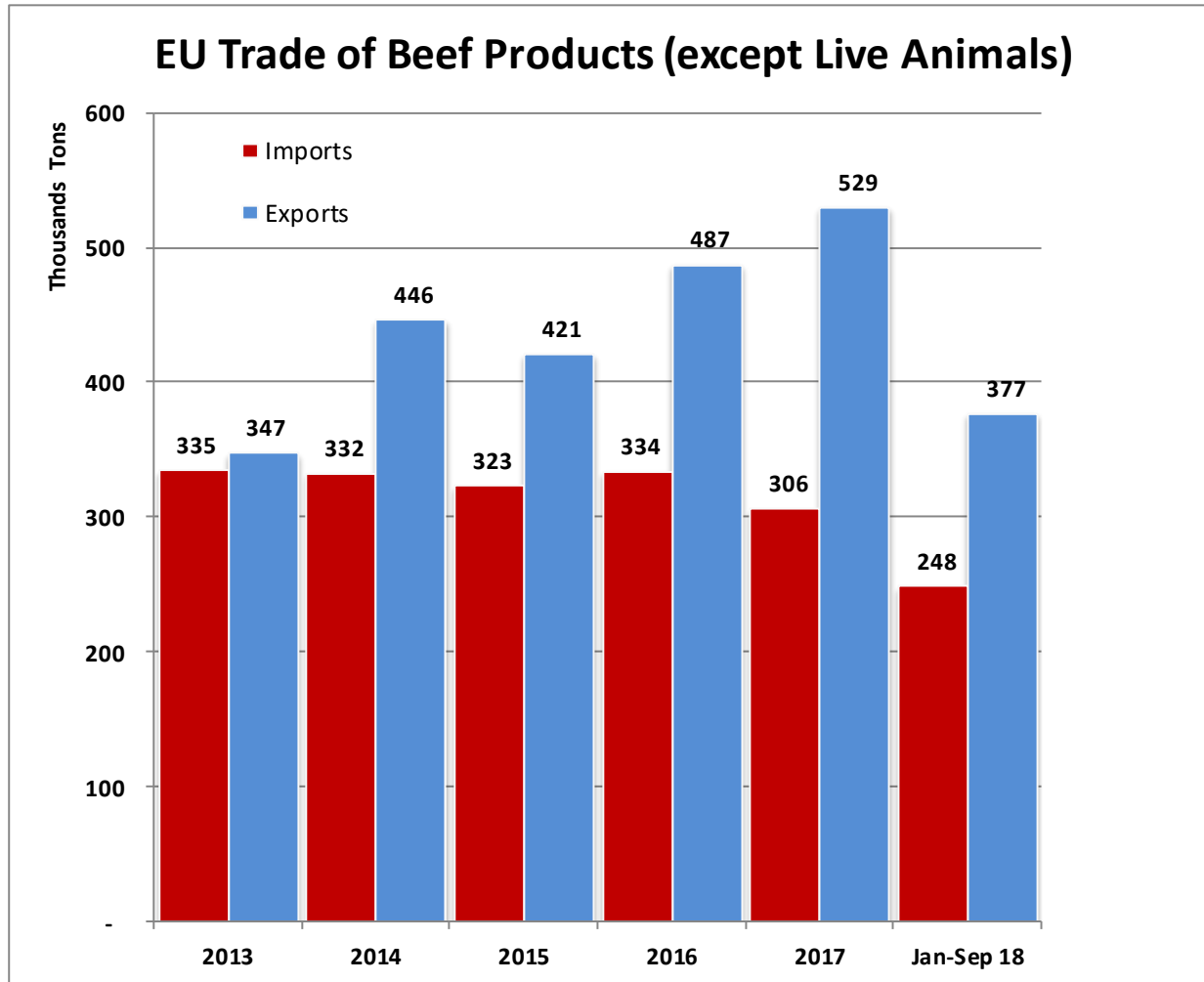
## EU IMPORTS Beef Products

### EU-28 Imports of BEEF products



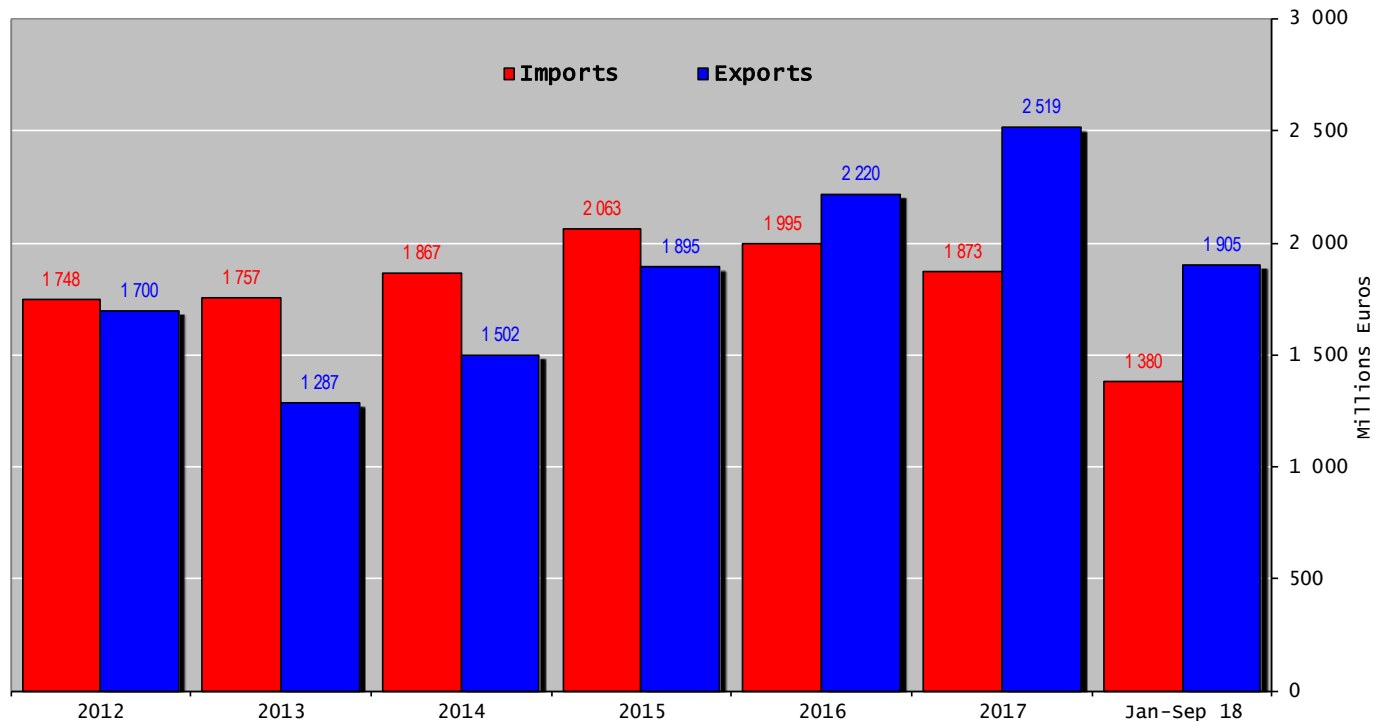
### Trade balance of beef and live animals

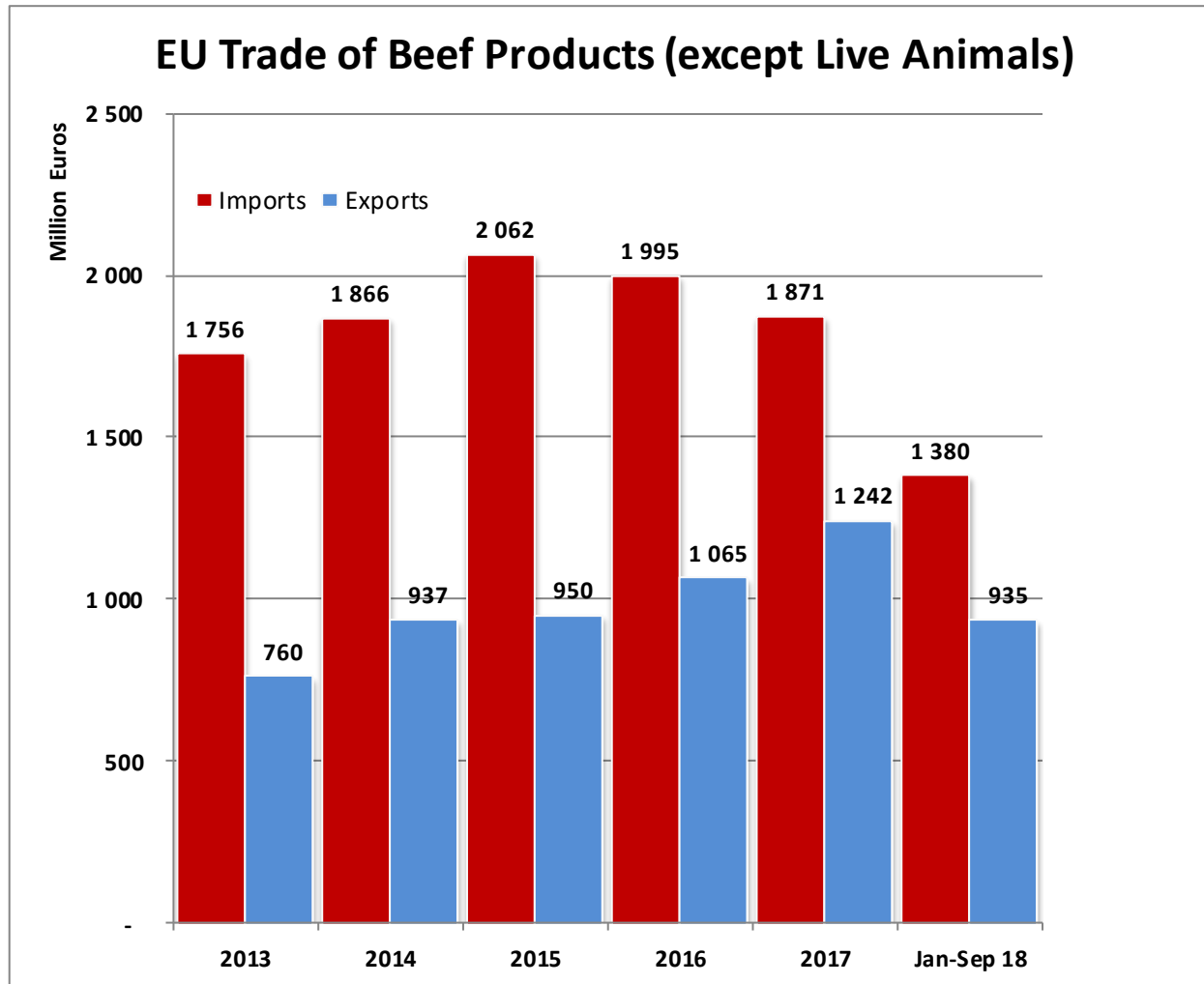




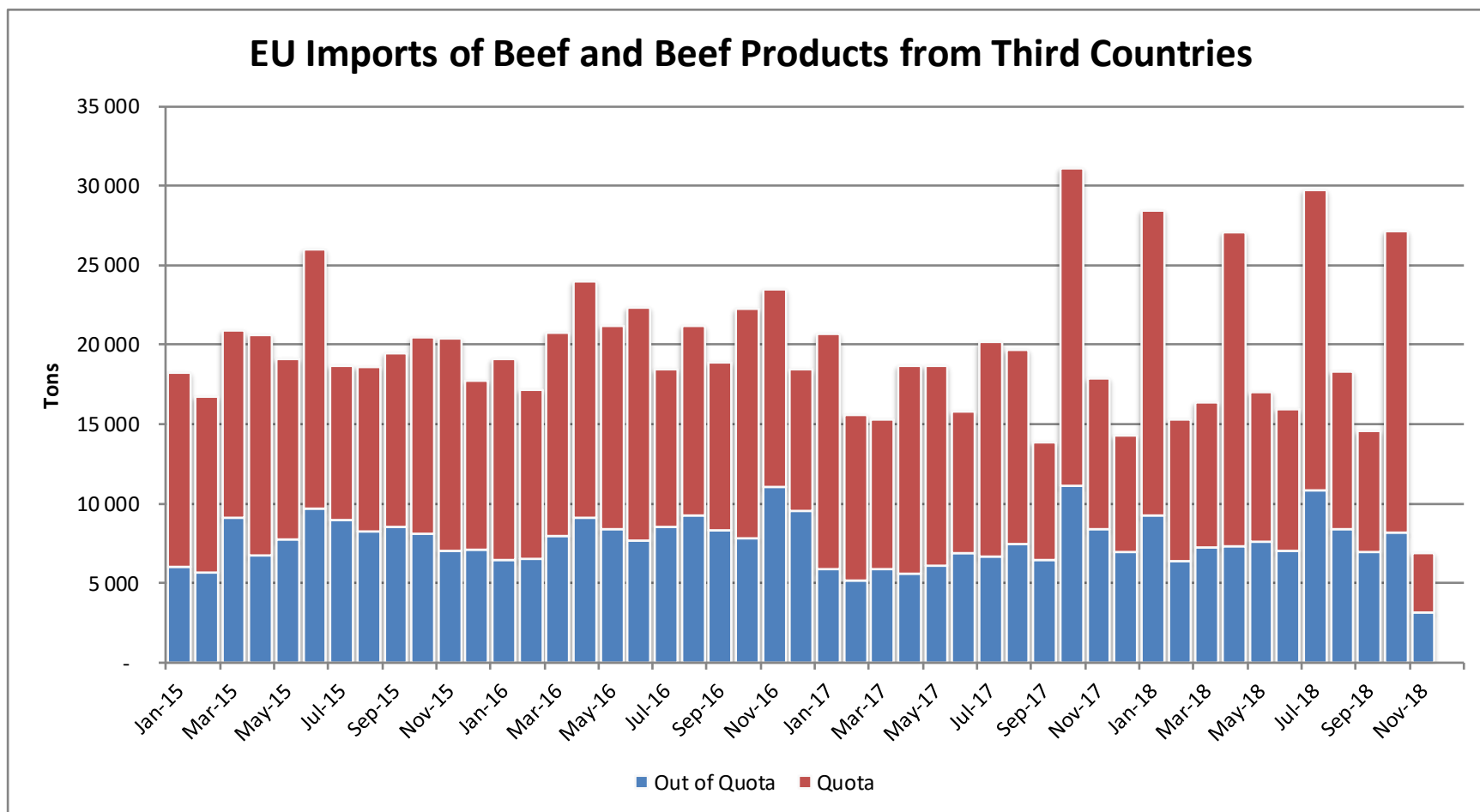
23 November 2018

#### Trade balance of beef and live animals



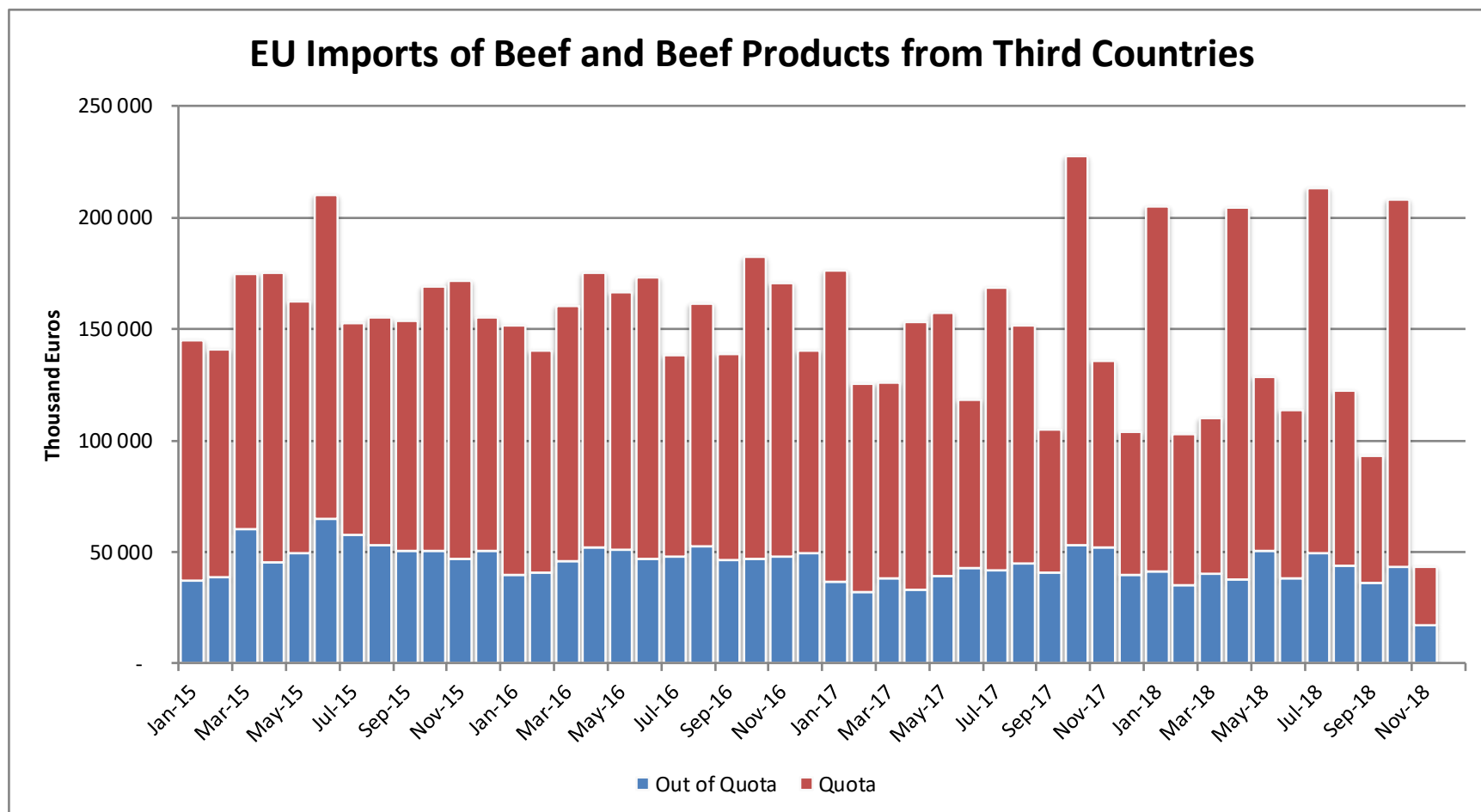


# Import in an out of TRQs



23 November 2018

# Import in an out of TRQs



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# 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%	4.90	2.45%
09.4450	Argentina	29 500	23 111.89	78.35%	28 091.29	95.22%	7 704.70	26.12%
09.4451	Australia	7 150	4 051.04	56.66%	5 333.48	74.59%	2 484.40	34.75%
09.4452	Uruguay	6 376	6 365.55	99.84%	6 363.24	99.80%	1 781.71	27.94%
09.4453	Brazil	10 000	8 572.40	85.72%	5 057.27	50.57%	1 360.19	13.60%
09.4454	New Zealand	1 300	1 161.63	89.36%	1 122.25	86.33%	348.71	26.82%
09.4002	Canada/US	11 500	421.40	3.66%	2 351.37	20.45%	2 002.72	17.41%
09.4455	Paraguay	1 000	982.60	98.26%	962.21	96.22%	244.05	24.41%
Total Beef		66 826	44 666.51	66.84%	49 281.11	73.75%	15 926.48	23.83%
Total Buffalo		2 450	12.75	0.52%	14.67	0.60%	4.90	0.20%
Total		69 276	44 679.26	64.49%	49 295.78	71.16%	15 931.38	23.00%

\* up to 30/09/2018

# High Quality Beef Import Quotas

Quota erga omnes

Regulation (EU) No 481/2012

	2013-Q3	2013-Q4	2014-Q1	2014-Q2	TOTAL
Period 2013-2014	10 198 942	10 493 437	10 191 527	10 282 860	41 166 765
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	84.64%	87.08%	84.58%	85.33%	85.41%

	2014-Q3	2014-Q4	2015-Q1	2015-Q2	TOTAL
Period 2014-2015	11 842 700	11 745 231	11 353 830	12 457 389	47 399 150
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	98.28%	97.47%	94.22%	103.38%	98.34%
Available after transfer	12 050 000	12 257 300	12 562 069	13 258 240	
	98.28%	95.82%	90.38%	93.96%	

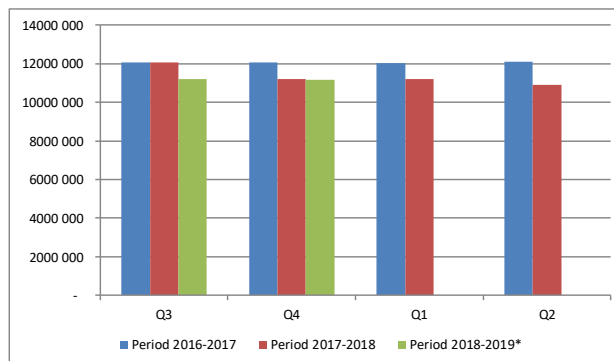
	2015-Q3	2015-Q4	2016-Q1	2016-Q2	TOTAL
Period 2015-2016	11 952 185	11 851 187	11 535 011	12 664 673	48 003 056
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	99.19%	98.35%	95.73%	105.10%	99.59%
Available after transfer	12 050 000	12 147 815	12 346 627	12 861 617	
	99.19%	97.56%	93.43%	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	11 195 874	11 200 881	10 897 594	45 346 164
Available	12 050 000	11 161 000	11 250 000	11 250 000	45 711 000
Use	100.00%	100.00%	99.56%	96.87%	99.20%
Available after transfer	12 050 000	11 159 185	11 215 126	11 299 119	
	100.00%	100.00%	99.87%	96.45%	

	2018-Q3	2018-Q4	2019-Q1	2019-Q2	TOTAL
Period 2018-2019*	11 216 739	11 173 531	-	-	22 390 270
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.70%				49.76%
Available after transfer	11 250 000	11 283 261			
	99.70%	99.03%			

\* Until 16.11.2018

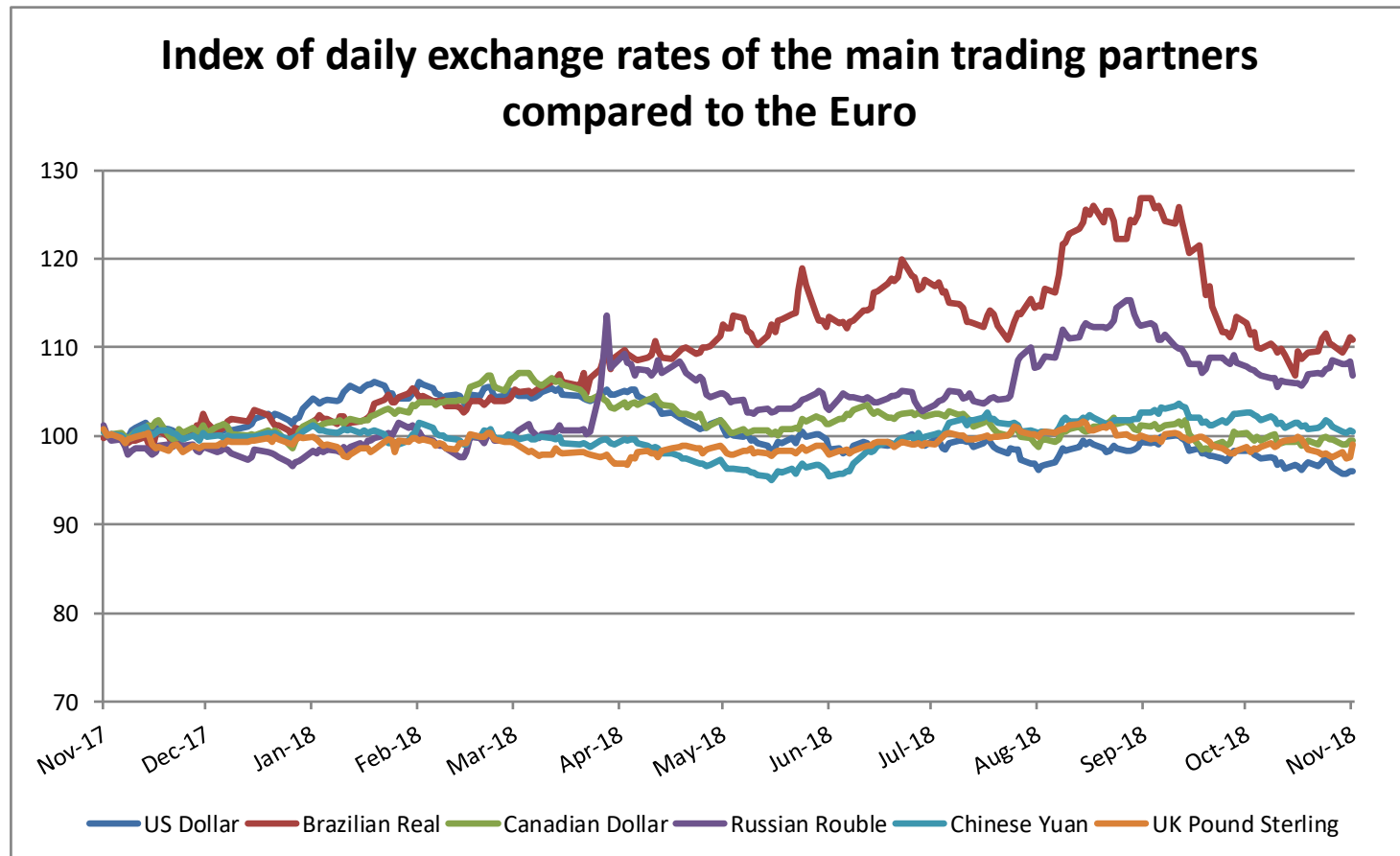


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# WORLD BEEF MARKET

EXCHANGE RATE INDEX / Euro

Main Trading Partners



Source : ECB

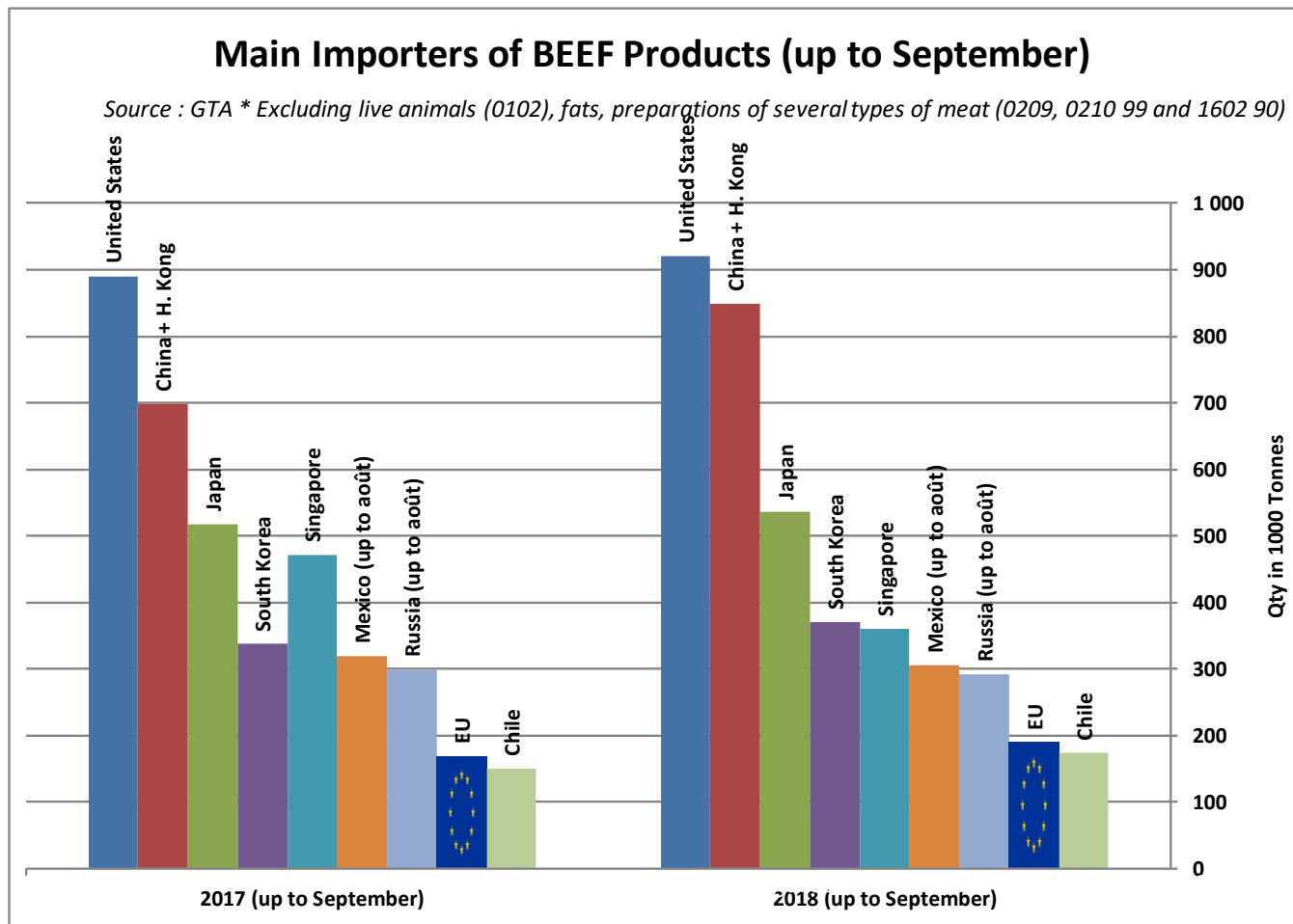
23 November 2018

# 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)



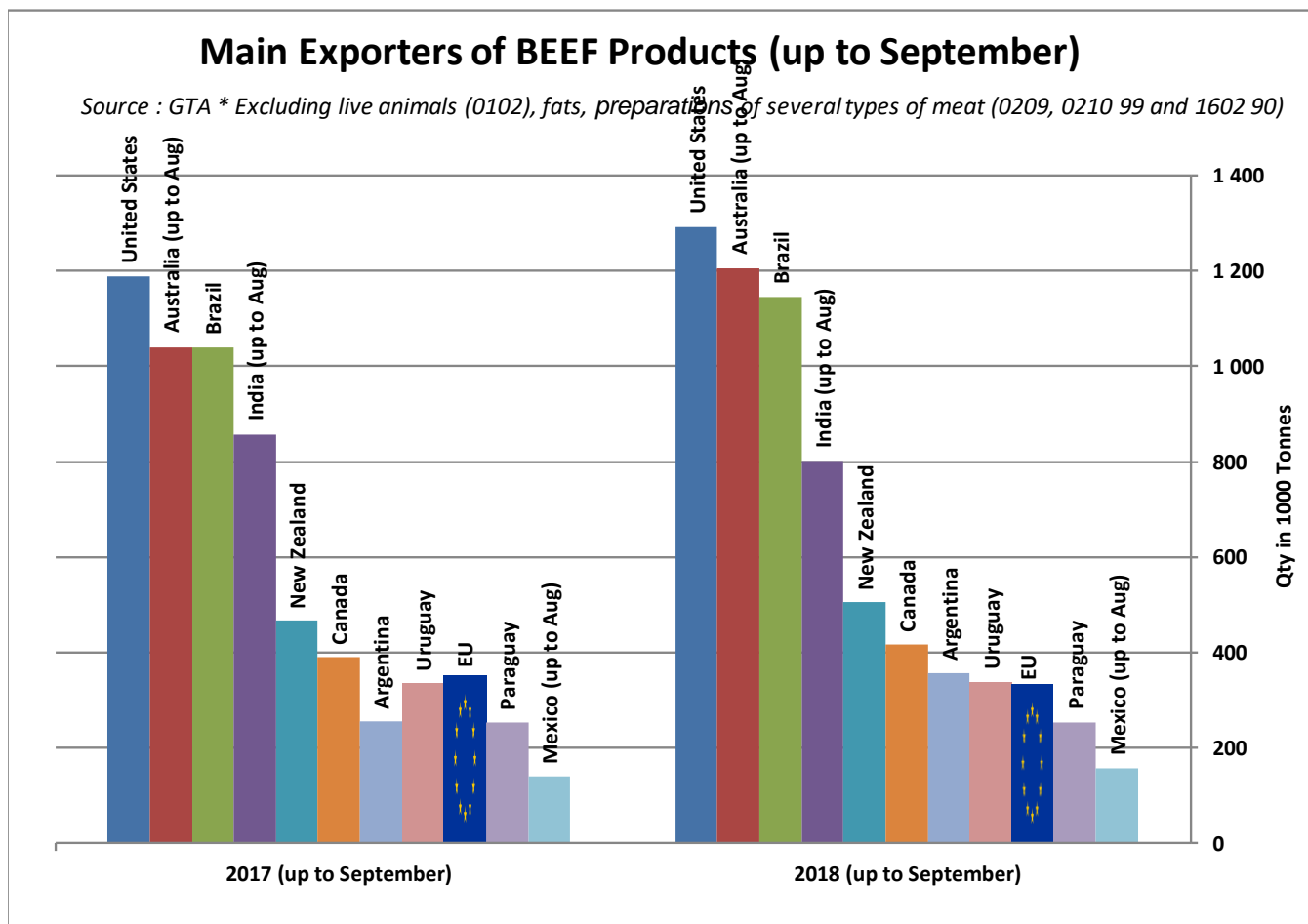
23 November 2018

# WORLD BEEF MARKET

# E.U. EXPORTS BEEF MAIN EXPORTERS

Source : GTA

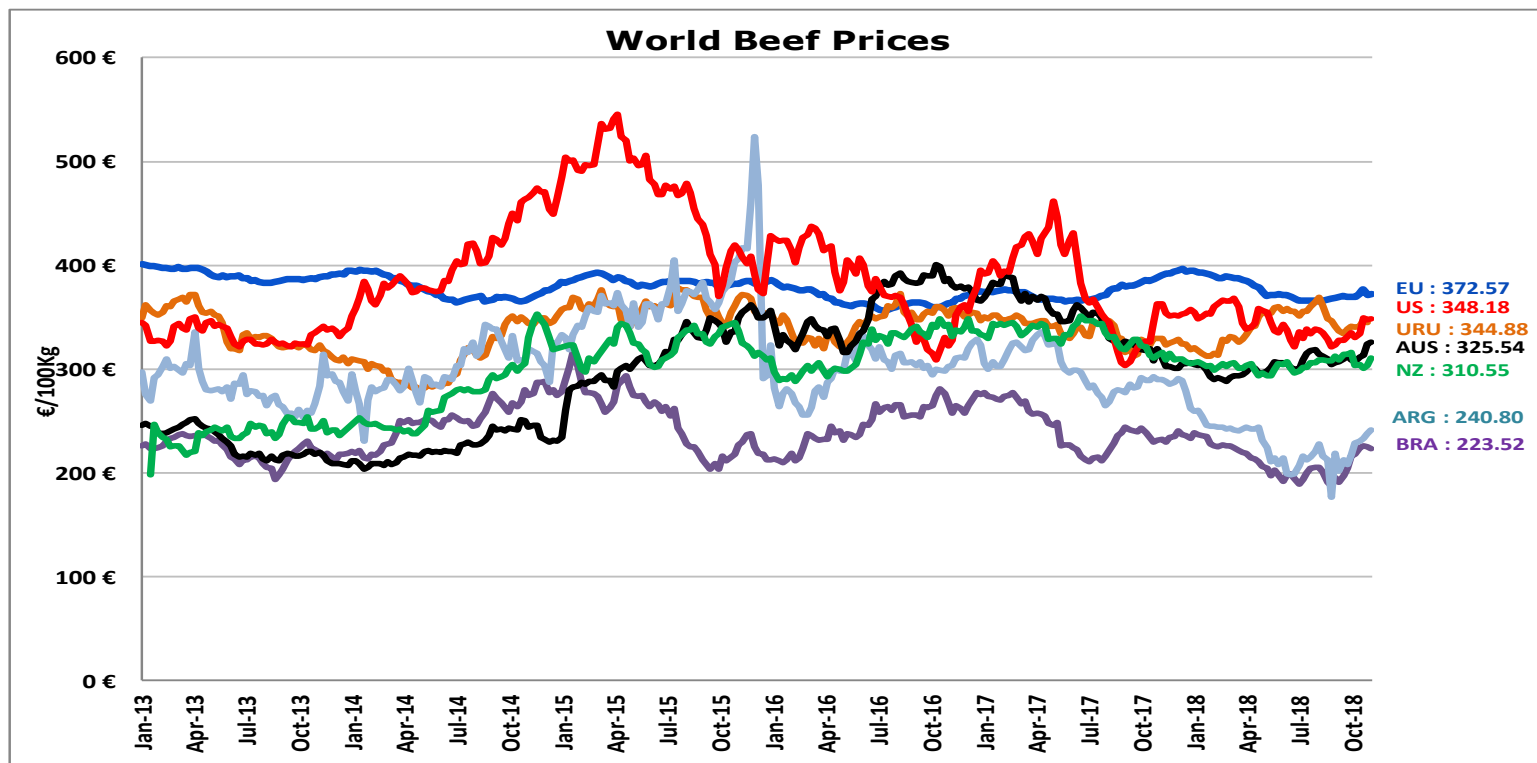
\* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



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# 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)

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*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/>*