



BEEF & VEAL MARKET SITUATION



Meat Market Observatory 30 May 2022

PRODUCTION

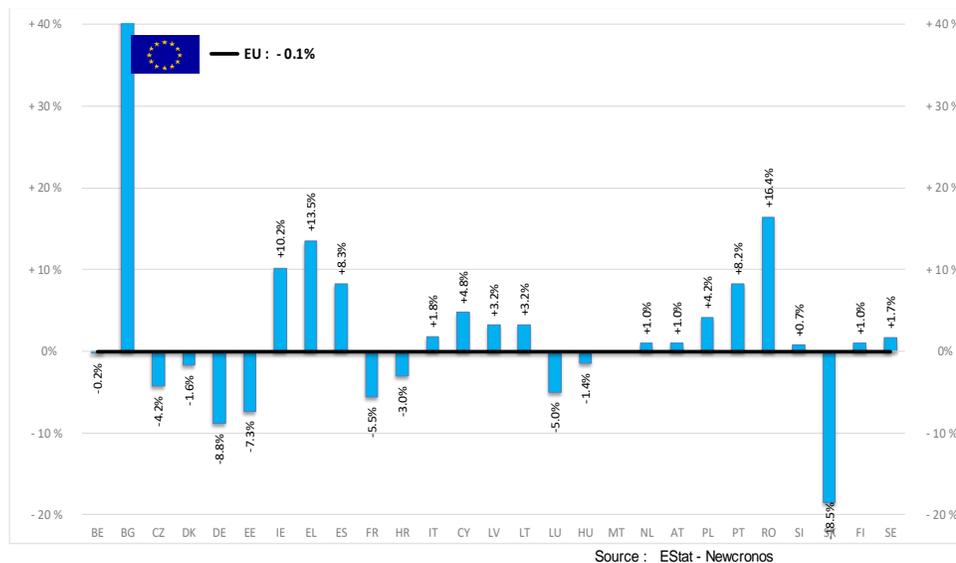
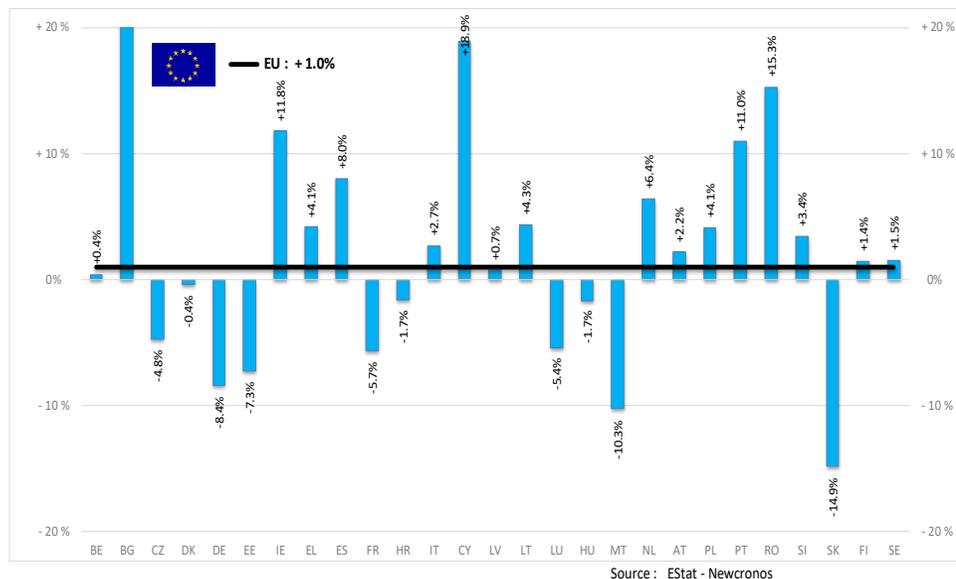
% EVOLUTION

HEADS	Jan-Feb 22/21
	EU
Bull	-2.0%
Bullock	+8.3%
Cow	-1.1%
Heifer	+4.2%
Calve	+1.8%
Young cattle	+7.5%
Meat of bovine animals	+1.0%

Estimates for last month of period :

TONNES	Jan-Feb 22/21
	EU
Bull	-2.2%
Bullock	+6.0%
Cow	-2.3%
Heifer	+2.4%
Calve	+0.5%
Young cattle	+11.2%
Meat of bovine animals	-0.1%

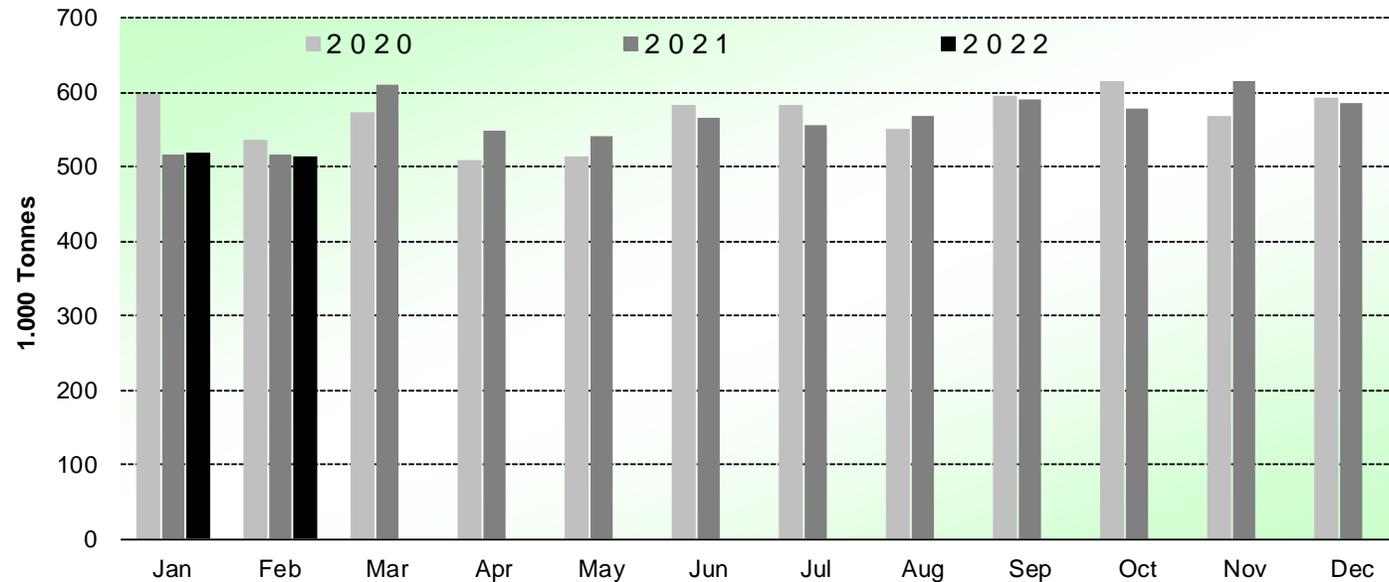
Estimates for last month of period :



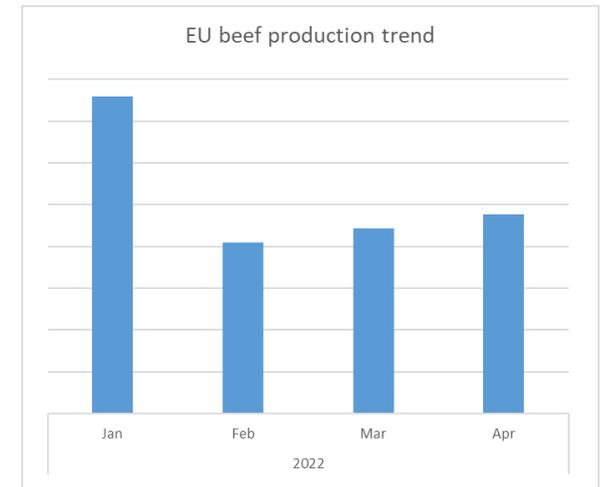
PRODUCTION

HISTORIC TONNES

Beef & Veal Production (EU Slaughtering) - Tonnes



Source : EStat-Newcronos



MS notifications – Reg. 2017/1185
Provisional data – subject to changes

PRICES CARCASSES

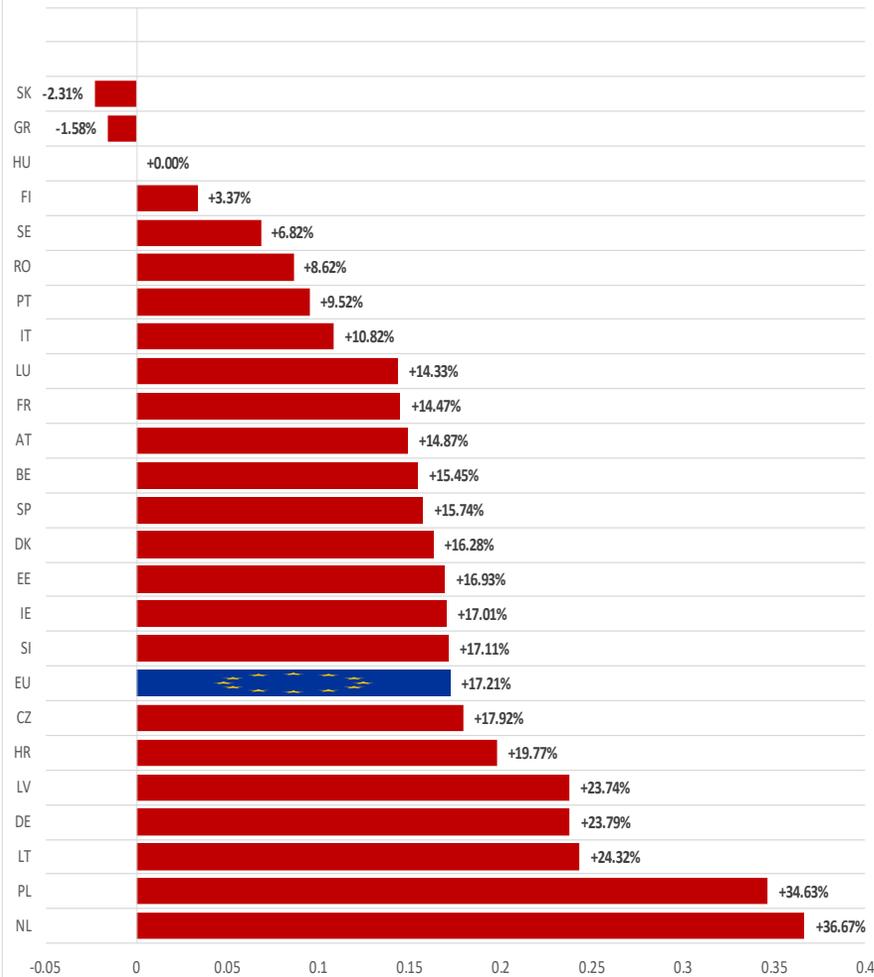
Dashboard

EU Prices week		19	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	498.0	+ 0.0%	+ 2.0%	+ 33.1%
	Young Bovines (Z)	477.5	+ 0.0%	+ 1.5%	+ 30.3%
	Young Bulls (A)	500.2	- 0.3%	+ 1.4%	+ 34.9%
	Steers (C)	515.5	+ 1.6%	+ 5.0%	+ 26.4%
	Cows (D)	464.1	- 0.1%	+ 2.4%	+ 52.9%
	Heifers (E)	508.7	+ 1.0%	+ 2.2%	+ 32.4%
	Calves slaughtered <8M	590.1	- 2.1%	- 0.4%	+ 24.2%
Live Animals	Male Calves Dairy Type	125.9	+ 2.2%	+ 18.4%	+ 36.3%
	Male Calves Beef Type	249.0	+ 1.2%	+ 5.7%	+ 18.0%
	Young Store Cattle	3.13	+ 1.6%	+ 4.0%	+ 17.2%
	Yearling Male Store Cattle	3.84	+ 1.5%	- 2.4%	+ 21.2%
	Yearling Female Store Cattle	2.99	+ 1.2%	+ 2.7%	+ 19.3%

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

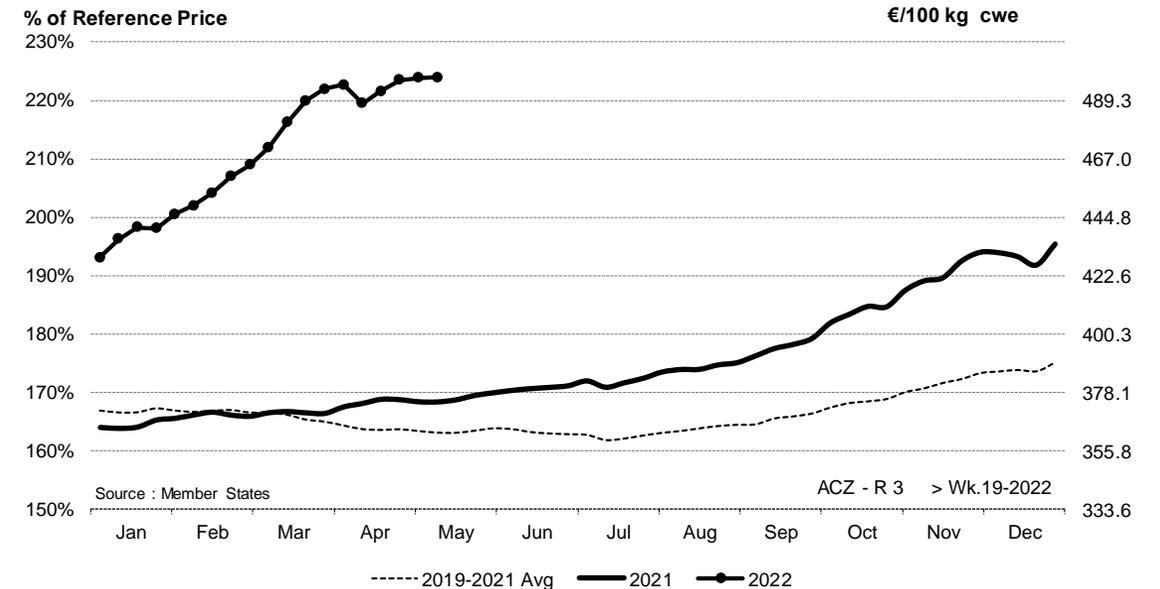
PRICES CARCASSES

EU ACZ R3 Price Comparison between average monthly price May 2021 - April 2022 compared to May 2020 - April 2021



EU EVOLUTION A/C/Z.R3

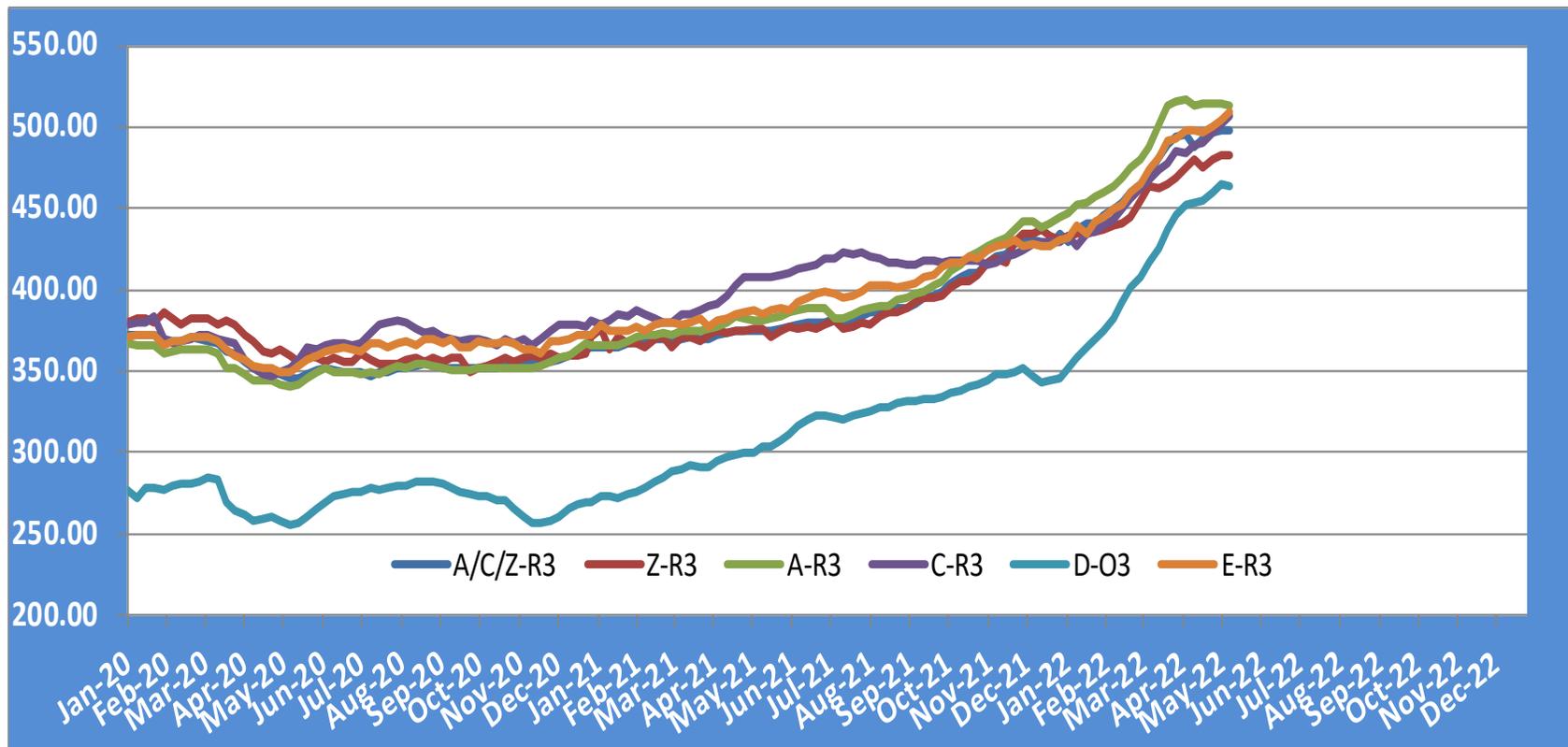
ACZ - R 3 > Wk.19-2022



Price in week 19 :	498.03	Average price in April 2022 :	493.20
% change y/y :	+ 33.10%	% change y/y :	+ 32.08%
% Ref. Price in wk 0 :	223.9%		

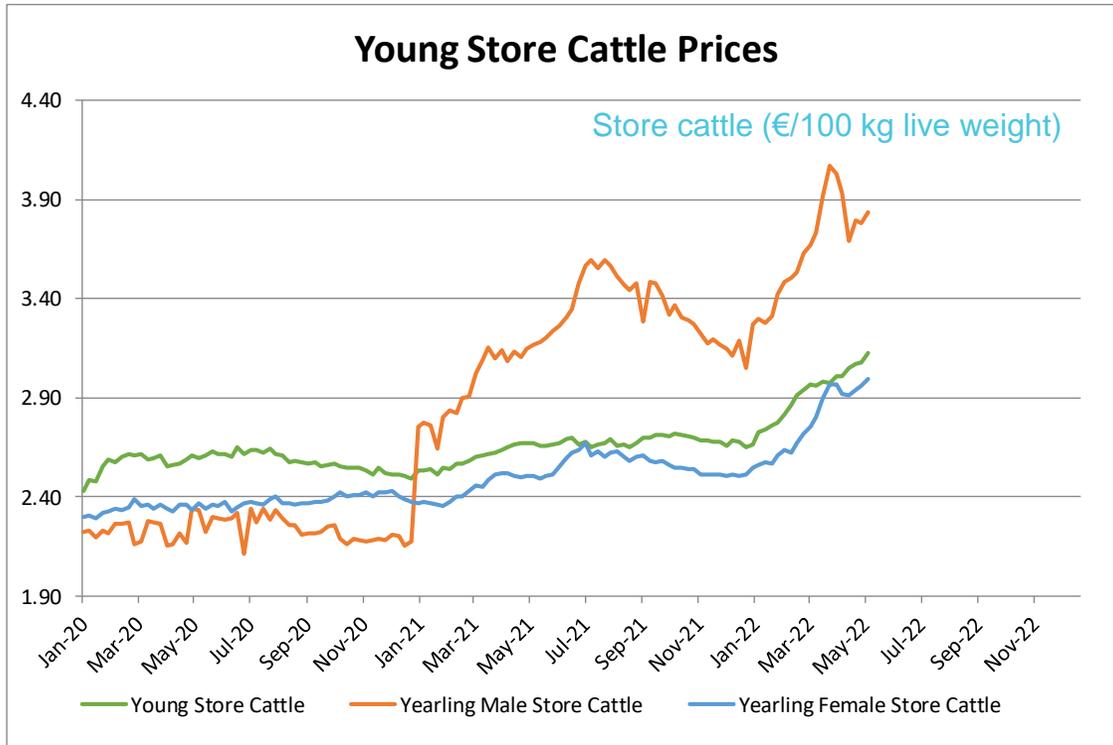
PRICES CARCASSES

EU EVOLUTION ALL CAT GLOBAL VIEW

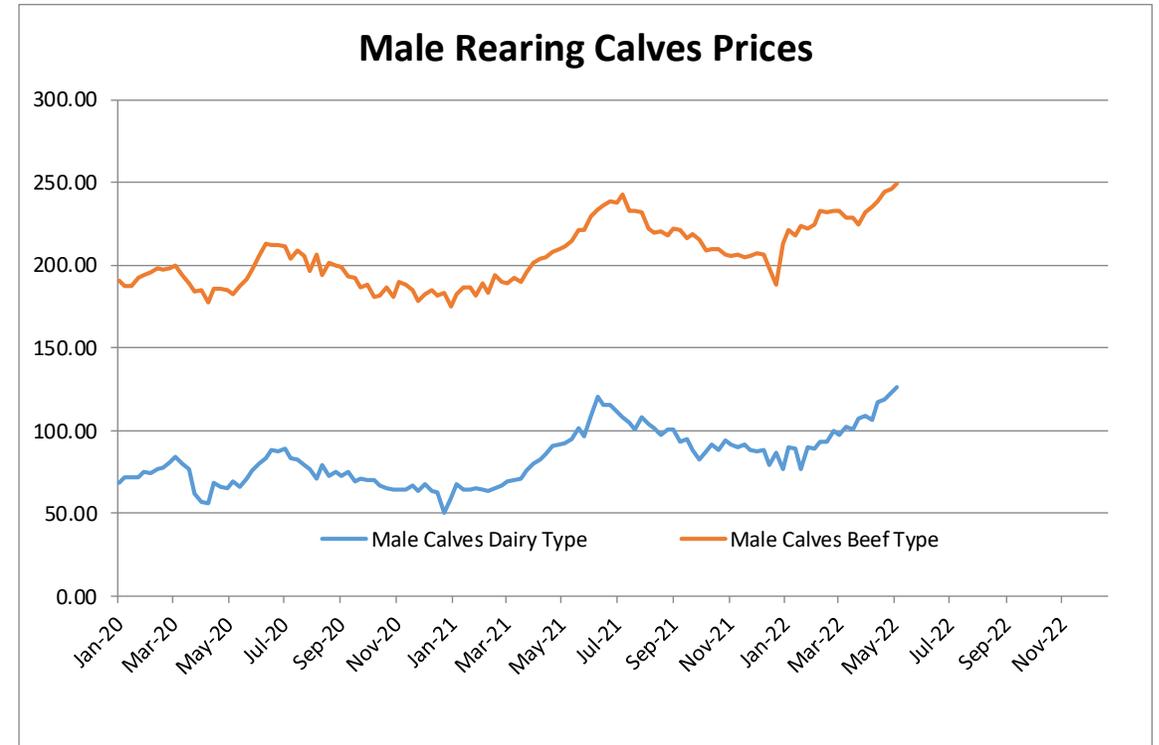


PRICES LIVE BOVINES

EU EVOLUTION STORE CATTLE



Young Store Cattle Price in	Week 19	3.13	Yearling Male Store Cattle Price	3.84
	Change y/y	+17.16%	Change y/y	+21.16%
Yearling Female Store Cattle Price		2.99		
	Change y/y	+19.30%		

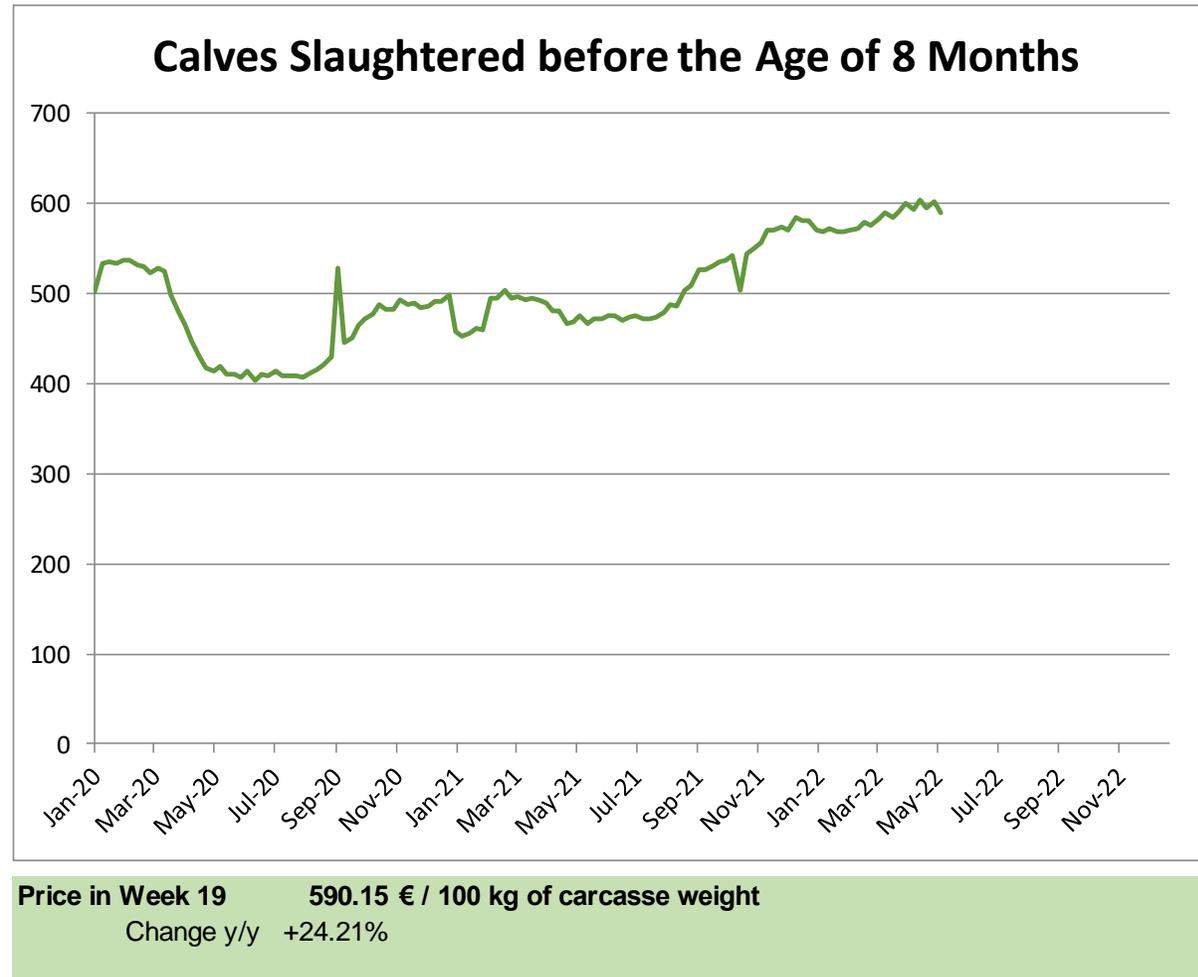


Male Rearing Calves Beef type	Male Rearing Calves Dairy type		
Price in Week 19	249.07	Price in Week 19	125.93
Change y/y	+18.05%	Change y/y	+36.27%

PRICES LIVE BOVINES

EU EVOLUTION Butcher Calves

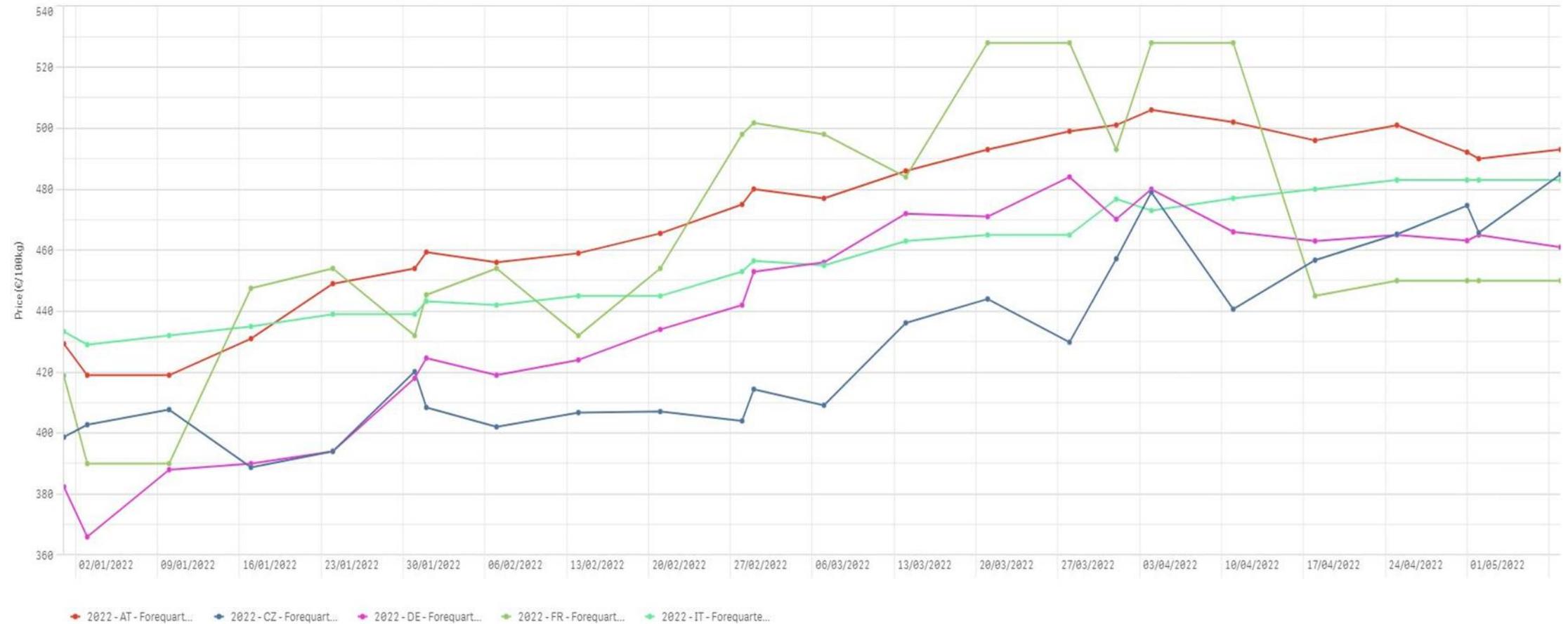
Calves slaughtered before the age of less than 8 months
(€/100 kg cw)



BEEF FOREQUARTERS P R I C E S

Beef Cuts Price Evolution for Austria, Czechia, France, Germany, Italy

Year Selection: 2022 | Category: Forequarter (Selling price)



MS notifications – Reg. 2017/1185
Provisional data – subject to changes

BEEF HINDQUARTERS P R I C E S

Beef Cuts Price Evolution for Austria, Czechia, France, Germany, Italy

Year Selection: 2022 | Category: Hindquarter (Selling price)

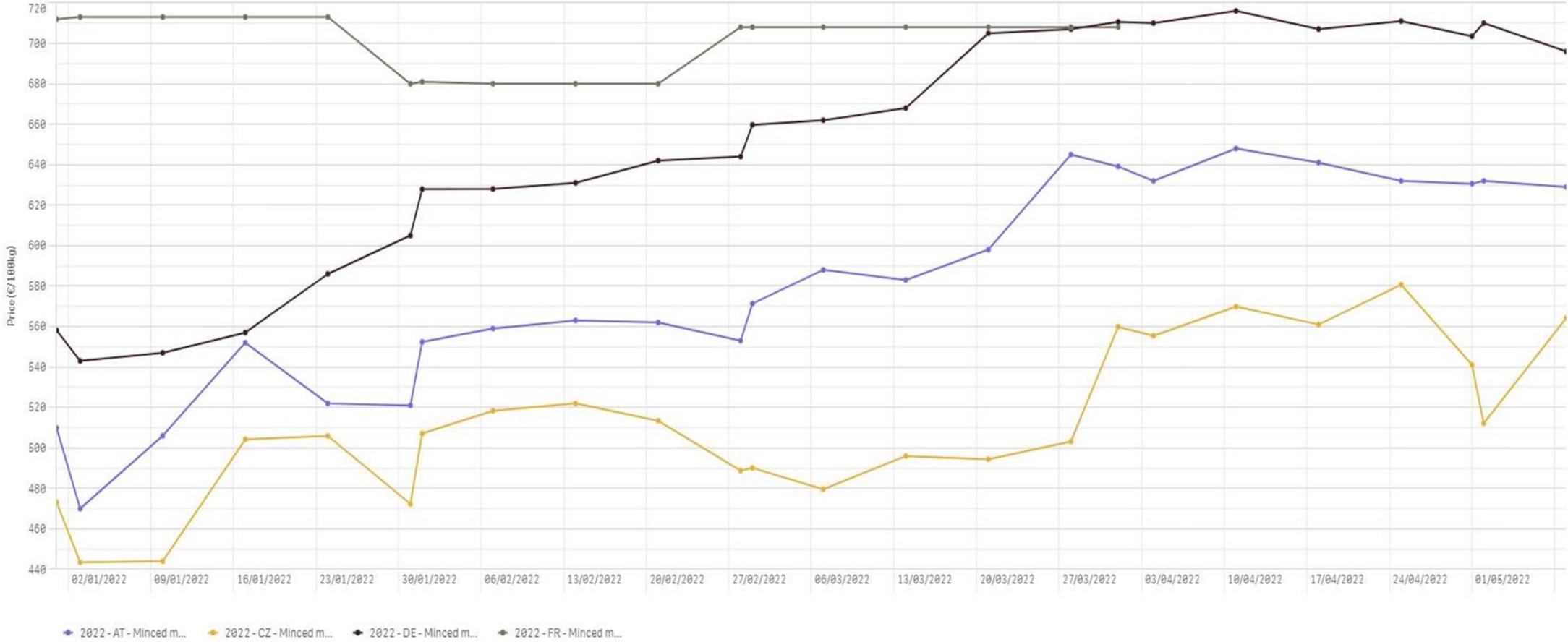


MS notifications – Reg. 2017/1185
Provisional data – subject to changes

BEEF MINCED MEAT SELLING PRICES

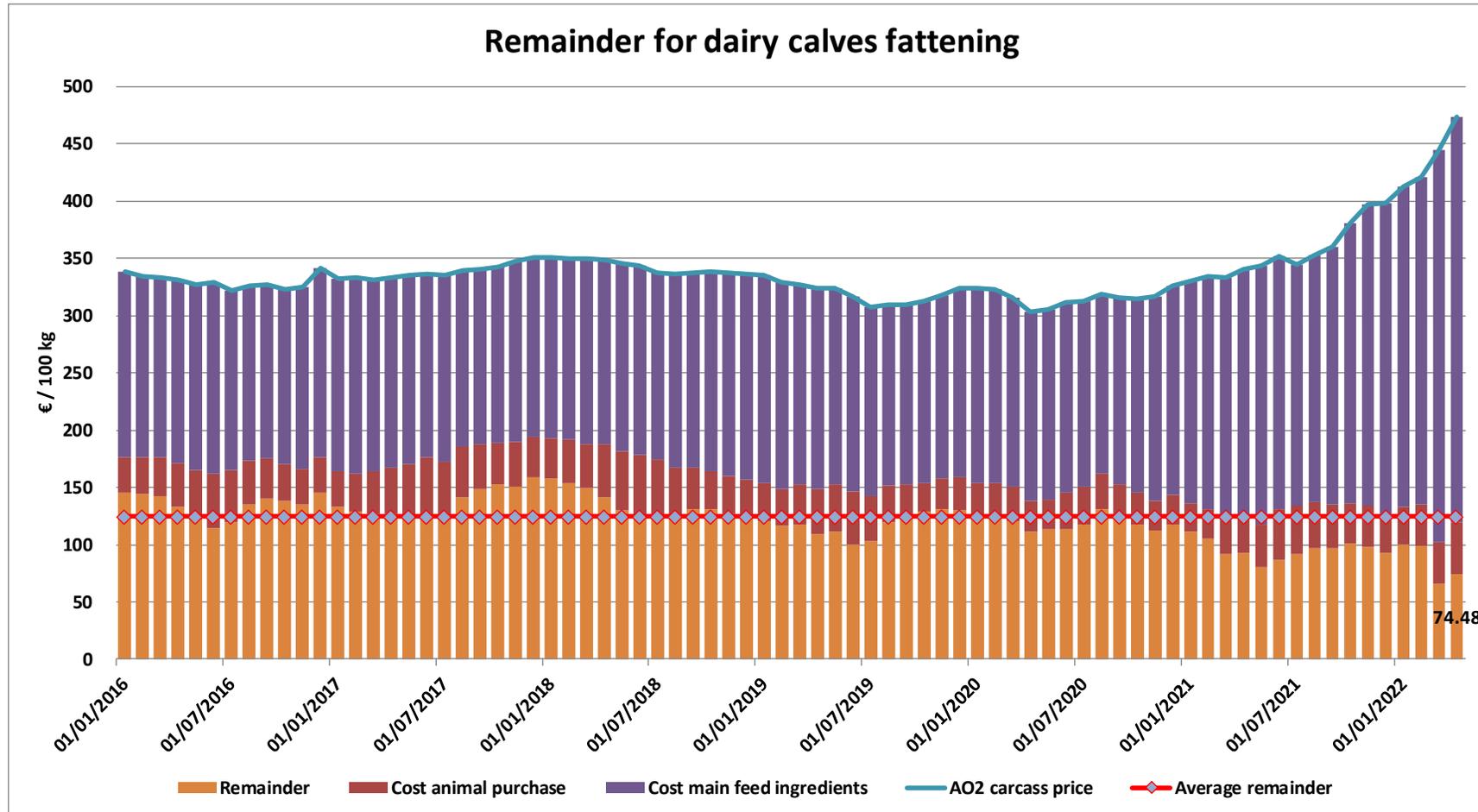
Beef Cuts Price Evolution for Austria, Czechia, France, Germany

Year Selection: 2022 | Category: Minced meat (Selling price)

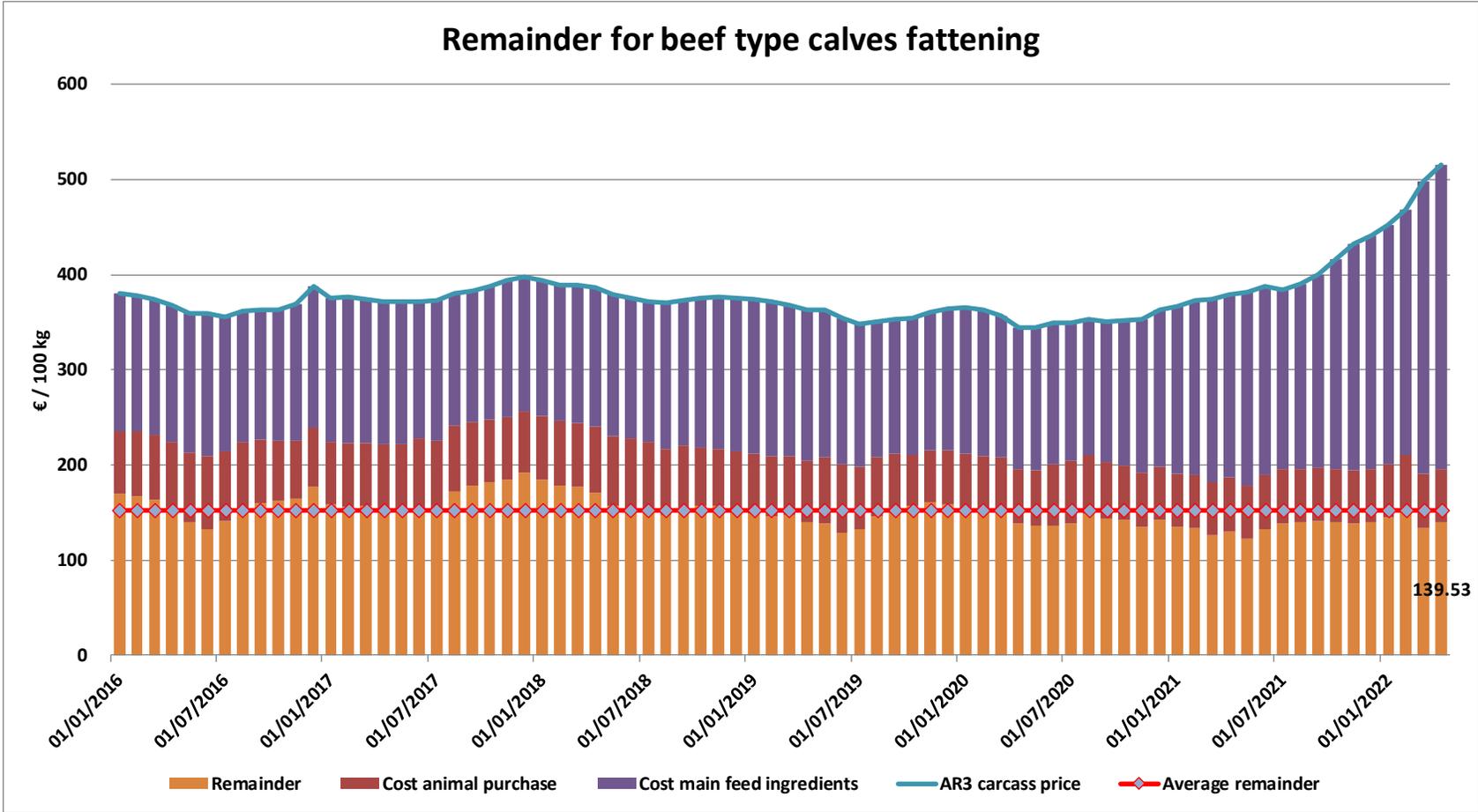


MS notifications – Reg. 2017/1185
 Provisional data – subject to changes

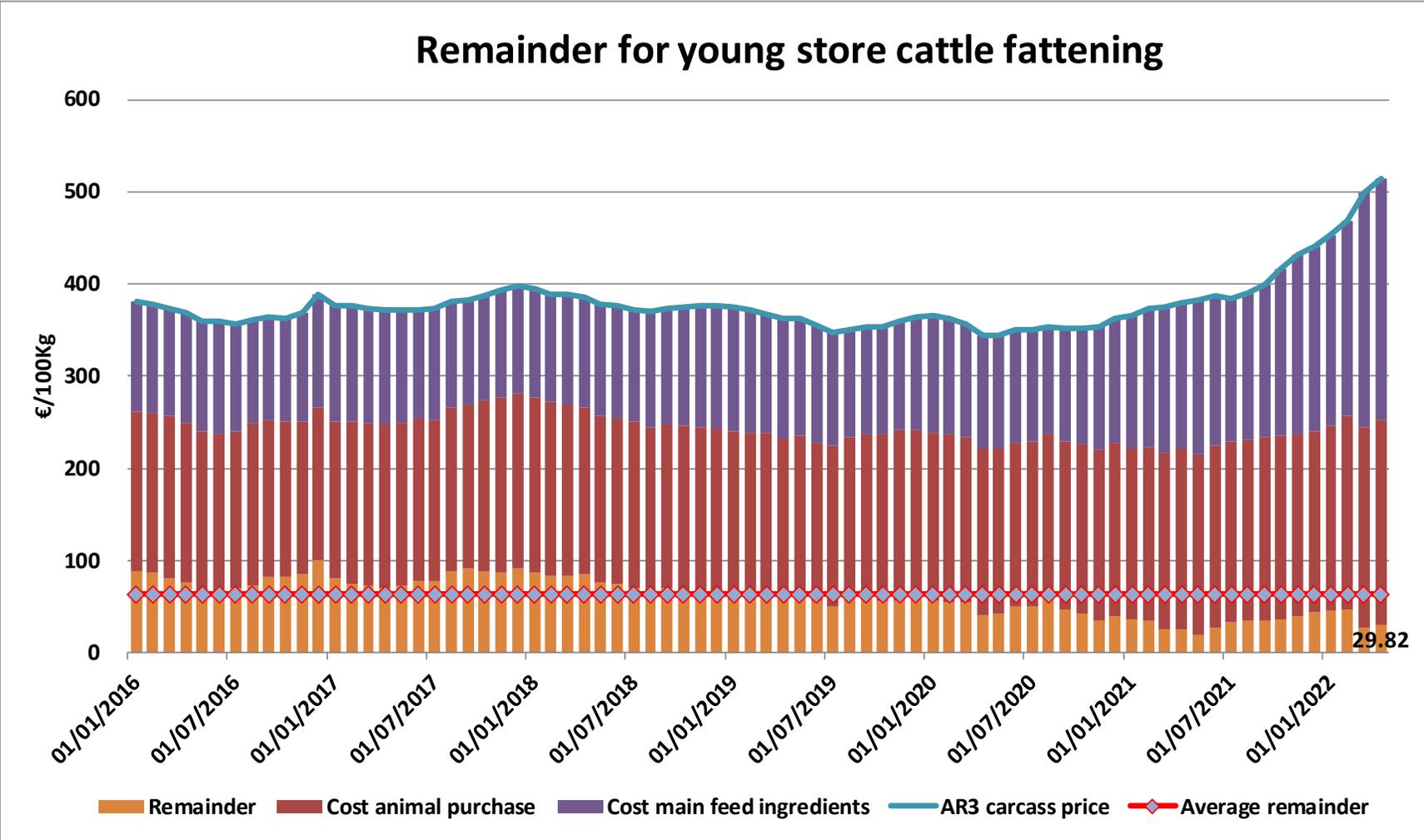
REMAINDERS



REMAINDERS



REMAINDERS



TRADE

EU EXPORTS

Beef & Live Animals

EU Exports of Beef and Live Animals (1): Trade figures (COMEXT – tonnes cwe)

In Tons of Carcase Weight

Destinations	2020		2021		Jan to Feb 2022		Compared to Jan to Feb 2021
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	456.999	39,3%	353.745	33,4%	57.654	38,2%	+43,7%
Israel	56.974	4,9%	66.593	6,3%	10.841	7,2%	+46,2%
Ghana	47.358	4,1%	47.641	4,5%	5.395	3,6%	-26,7%
Ivory Coast	32.433	2,8%	29.236	2,8%	5.205	3,4%	-2,6%
Bosnia-Herz.	35.744	3,1%	41.396	3,9%	4.875	3,2%	-9,5%
Philippines	39.844	3,4%	45.208	4,3%	4.354	2,9%	-25,1%
Switzerland	29.993	2,6%	33.916	3,2%	4.200	2,8%	+36,8%
Algeria	39.396	3,4%	24.127	2,3%	4.011	2,7%	-20,9%
Canada	20.450	1,8%	20.676	2,0%	3.656	2,4%	+44,8%
Japan	11.885	1,0%	21.888	2,1%	3.316	2,2%	+88,3%
Norway	12.936	1,1%	18.254	1,7%	3.249	2,2%	-19,8%
Other Destinations	377.557	32,5%	357.428	33,7%	44.330	29,3%	-22,0%
Extra-EU	1.161.570		1.060.106		151.086		+4,3%
% Change				-8,7%			

In Thousand Euros

Destinations	2020		2021		Jan to Feb 2022		Compared to Jan to Feb 2021
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	1.508.698	40,2%	1.487.590	38,5%	268.992	42,8%	+62,8%
Israel	266.074	7,1%	328.555	8,5%	57.897	9,2%	+67,1%
Ghana	43.585	1,2%	48.021	1,2%	5.993	1,0%	-9,9%
Ivory Coast	21.626	0,6%	25.684	0,7%	4.094	0,7%	+1,1%
Bosnia-Herz.	96.620	2,6%	126.247	3,3%	18.579	3,0%	+21,2%
Philippines	61.861	1,6%	73.028	1,9%	10.497	1,7%	+6,6%
Switzerland	142.125	3,8%	171.272	4,4%	27.653	4,4%	+54,7%
Algeria	193.457	5,2%	111.742	2,9%	23.834	3,8%	+4,1%
Canada	65.044	1,7%	73.398	1,9%	13.599	2,2%	+73,7%
Japan	43.177	1,1%	98.109	2,5%	18.558	3,0%	+++
Norway	46.748	1,2%	69.931	1,8%	14.152	2,3%	-2,4%
Other Destinations	1.267.120	33,7%	1.249.280	32,3%	163.985	26,1%	-9,6%
Extra-EU	3.756.134		3.862.857		627.832		+28,8%
% Change				+2,8%			

TRADE (no UK)

EU EXPORTS

Beef & Live Animals

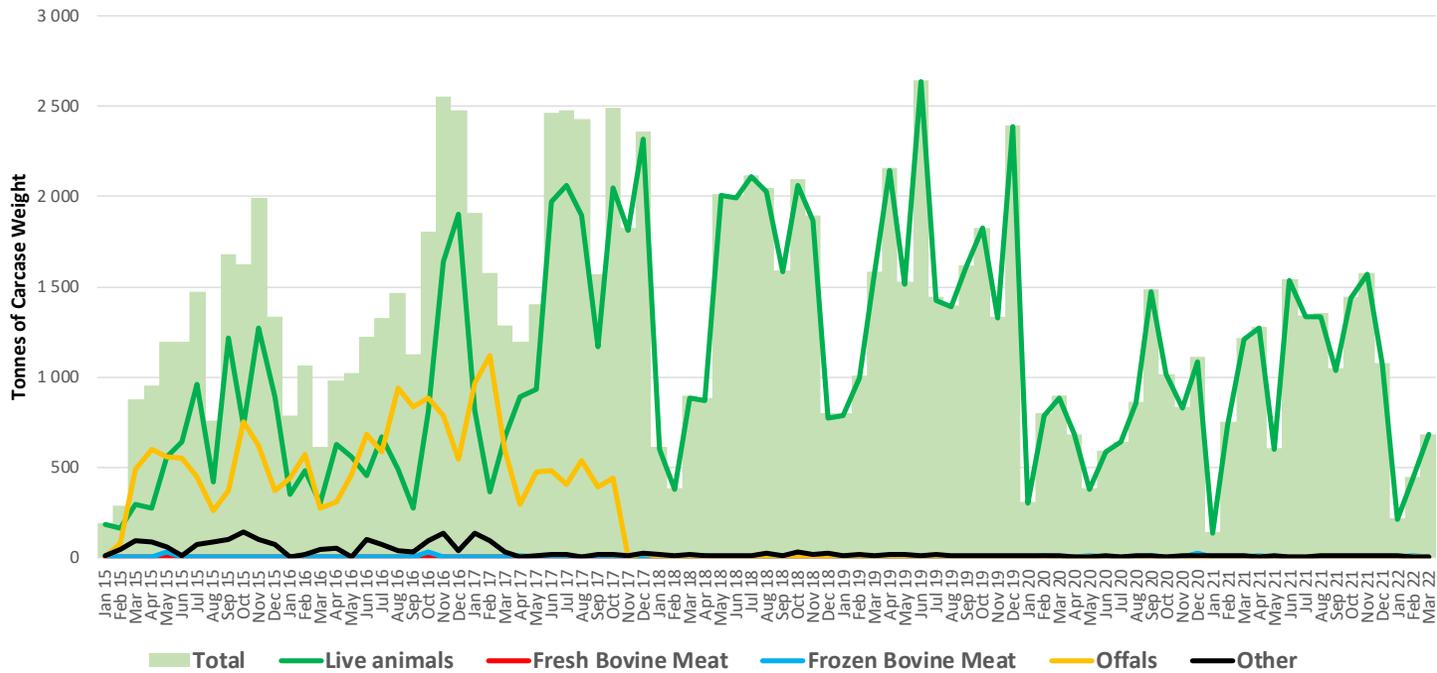
EU Exports of Beef and Live Animals (1): Trade figures (COMEXT – tonnes cwe)

Destinations	2018		2019		2020		2021		Jan-Mar 22		Compared to
	tonnes	%									
Israel	47 774	6.8%	49 629	7.1%	56 974	8.1%	66 593	9.4%	16 304	10.8%	+ 21.9%
Philippines	28 766	4.1%	34 158	4.9%	39 844	5.7%	45 208	6.4%	8 740	5.8%	- 30.3%
Ghana	36 766	5.2%	39 196	5.6%	47 358	6.7%	47 641	6.7%	8 212	5.4%	- 32.8%
Bosnia-Herz.	38 762	5.5%	41 119	5.9%	35 744	5.1%	41 396	5.9%	7 872	5.2%	- 11.7%
Switzerland	23 761	3.4%	25 188	3.6%	29 993	4.3%	33 916	4.8%	7 731	5.1%	+ 6.7%
Ivory Coast	36 064	5.1%	33 396	4.8%	32 433	4.6%	29 236	4.1%	7 199	4.8%	- 11.7%
Algeria	35 410	5.0%	57 152	8.2%	39 396	5.6%	24 127	3.4%	6 861	4.5%	- 15.6%
Lebanon	42 542	6.1%	36 393	5.2%	33 709	4.8%	20 013	2.8%	5 784	3.8%	- 24.7%
Norway	7 926	1.1%	7 667	1.1%	12 936	1.8%	18 254	2.6%	5 671	3.8%	- 16.4%
Canada	2 225	0.3%	6 806	1.0%	20 450	2.9%	20 676	2.9%	5 084	3.4%	+ 33.2%
Japan	3 452	0.5%	8 007	1.1%	11 885	1.7%	21 888	3.1%	4 876	3.2%	+ 56.6%
Egypt	6 297	0.9%	3 375	0.5%	7 961	1.1%	10 604	1.5%	3 983	2.6%	+ 141.1%
USA	5 458	0.8%	7 867	1.1%	12 310	1.7%	11 698	1.7%	3 873	2.6%	+ 20.3%
Libya	27 878	4.0%	24 541	3.5%	22 352	3.2%	19 986	2.8%	3 871	2.6%	- 21.7%
Hong Kong	55 537	7.9%	46 748	6.7%	56 860	8.1%	45 106	6.4%	3 555	2.4%	- 72.0%
Kosovo	12 691	1.8%	10 279	1.5%	10 902	1.5%	16 771	2.4%	3 416	2.3%	- 8.6%
<i>Other Destinations</i>	290 572	41.4%	268 720	38.4%	233 468	33.1%	233 251	33.0%	47 821	31.7%	
Total (without UK)	701 882		700 242		704 576		706 362		150 854		
% change			- 0%		+ 1%		+ 0%		- 13.5%		

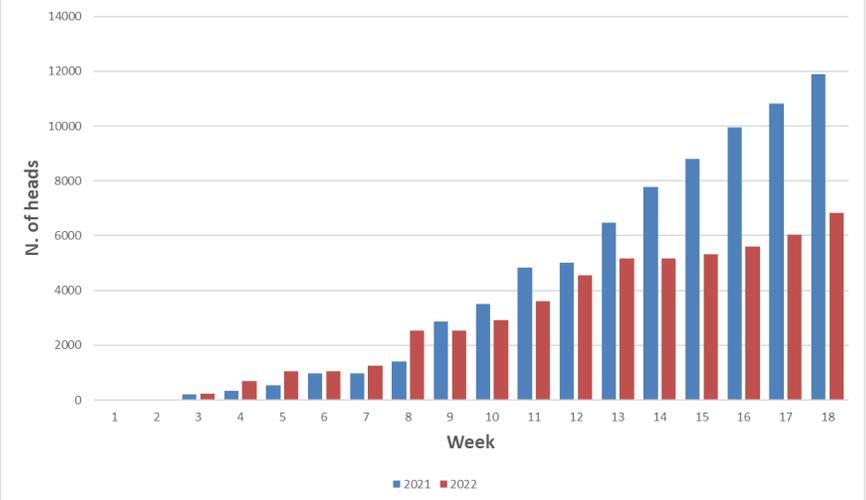
TRADE

EU EXPORTS Beef to RUSSIA

EU Beef Exports to Russia
Source : Comext in Tonnes of cwe



Cumulative export of live animals to Russia



Tax surveillance data

TRADE

EU IMPORTS

Beef & Live Animals

EU Imports of Beef and Live Animals (1): Trade figures (COMEXT – tonnes cwe)

In Tons of Carcase Weight

Destinations	2020		2021		Jan to Feb 2022		Compared to Jan to Feb 2021
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	130.961	36,8%	98.933	25,9%	20.707	36,3%	+++
Brazil	84.139	23,7%	81.558	21,3%	15.273	26,8%	+36,1%
Argentina	56.898	16,0%	75.606	19,8%	7.387	13,0%	+18,2%
Uruguay	34.612	9,7%	80.129	21,0%	6.415	11,2%	-4,8%
USA	16.532	4,6%	14.826	3,9%	1.834	3,2%	+2,0%
Australia	11.058	3,1%	8.937	2,3%	1.797	3,2%	-18,8%
Switzerland	4.325	1,2%	5.233	1,4%	785	1,4%	-16,4%
Paraguay	4.234	1,2%	3.933	1,0%	640	1,1%	+++
New Zealand	6.146	1,7%	4.392	1,1%	558	1,0%	+14,0%
Namibia	1.445	0,4%	1.996	0,5%	528	0,9%	+++
Japan	789	0,2%	1.479	0,4%	356	0,6%	+++
Other Destinations	4.466	1,3%	5.280	1,4%	754	1,3%	+5,4%
Extra-EU	355.604		382.301		57.038		+44,7%
% Change				+7,5%			

In Thousand Euros

Destinations	2020		2021		Jan to Feb 2022		Compared to Jan to Feb 2021
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	482.793	26,5%	358.117	20,1%	72.655	22,7%	+++
Brazil	377.626	20,7%	386.634	21,7%	81.530	25,4%	+75,8%
Argentina	358.357	19,7%	376.685	21,1%	51.871	16,2%	+71,9%
Uruguay	210.062	11,5%	247.020	13,9%	45.921	14,3%	+29,9%
USA	154.464	8,5%	155.926	8,7%	21.252	6,6%	+33,1%
Australia	91.489	5,0%	90.483	5,1%	19.653	6,1%	+3,1%
Switzerland	44.984	2,5%	53.395	3,0%	10.464	3,3%	-7,2%
Paraguay	20.834	1,1%	20.484	1,1%	3.442	1,1%	+++
New Zealand	41.143	2,3%	31.634	1,8%	4.348	1,4%	+51,5%
Namibia	5.725	0,3%	6.902	0,4%	1.681	0,5%	+++
Japan	10.314	0,6%	25.588	1,4%	3.498	1,1%	+++
Other Destinations	24.052	1,3%	30.273	1,7%	4.355	1,4%	+5,7%
Extra-EU	1.821.843		1.783.143		320.670		+59,5%
% Change				-2,1%			

EU Imports of all beef products – including fats

TRADE (no UK)

EU IMPORTS

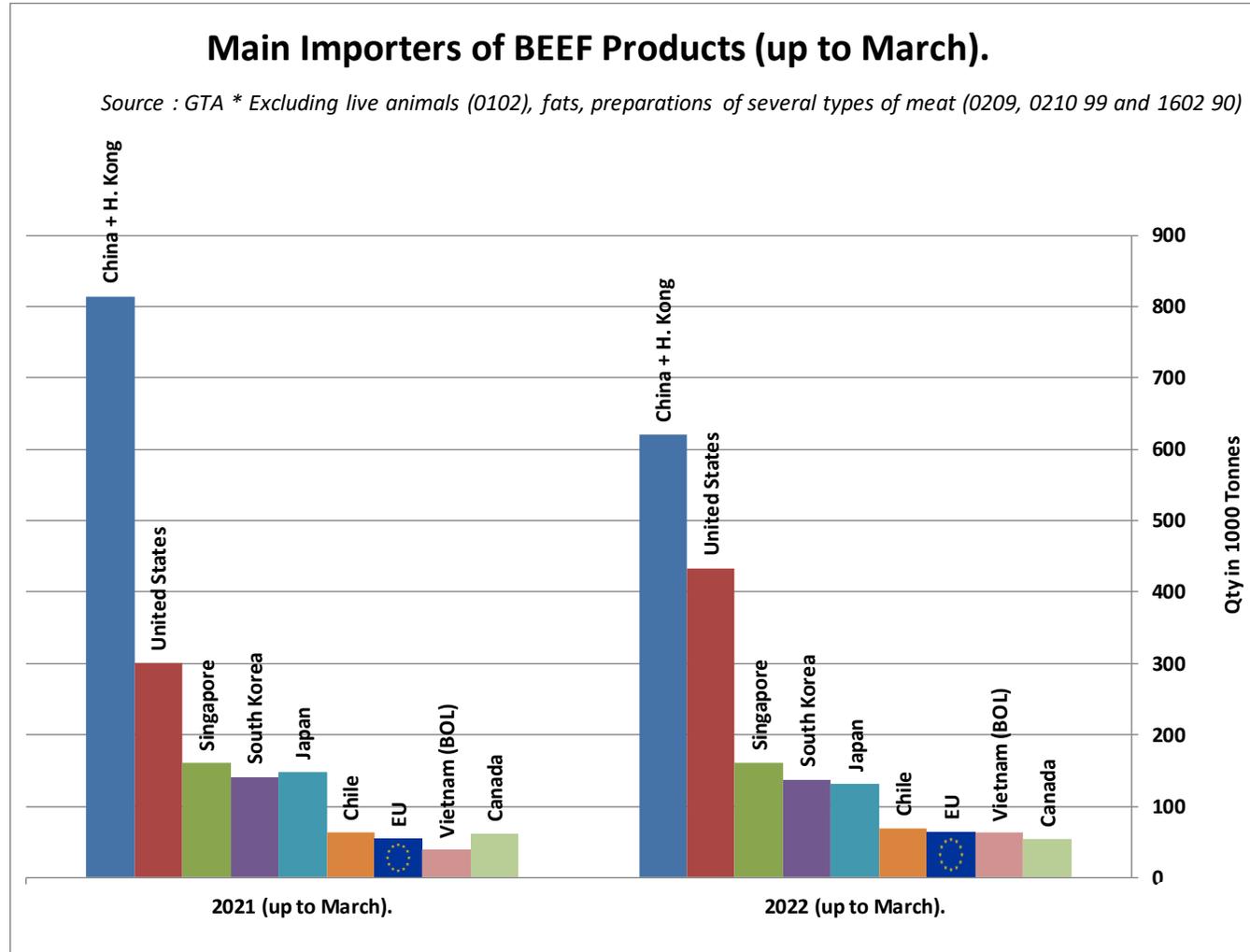
Beef

EU Imports of Beef (not including Fats): Trade Figures (COMEXT – tonnes cwe)

Origins	2018		2019		2020		2021		Jan-Mar 22		Compared to
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	103 979	37.3%	99 569	36.5%	84 139	37.6%	81 558	36.9%	25 146	45.6%	+ 16.8%
Argentina	61 400	22.0%	65 324	23.9%	56 421	25.2%	52 313	23.6%	10 922	19.8%	+ 10.1%
Uruguay	47 922	17.2%	40 483	14.8%	34 611	15.5%	42 660	19.3%	8 391	15.2%	- 25.4%
USA	19 268	6.9%	16 852	6.2%	16 532	7.4%	14 826	6.7%	3 202	5.8%	+ 6.5%
Australia	17 354	6.2%	16 432	6.0%	11 058	4.9%	8 925	4.0%	1 884	3.4%	- 20.4%
Switzerland	5 389	1.9%	4 353	1.6%	4 153	1.9%	4 680	2.1%	1 111	2.0%	- 12.3%
Paraguay	5 520	2.0%	5 203	1.9%	4 234	1.9%	3 933	1.8%	1 018	1.8%	+++
New Zealand	7 109	2.6%	6 712	2.5%	6 116	2.7%	4 378	2.0%	911	1.7%	+ 20.7%
Namibia	3 442	1.2%	7 706	2.8%	1 445	0.6%	1 996	0.9%	648	1.2%	+++
Japan	791	0.3%	997	0.4%	789	0.4%	1 478	0.7%	642	1.2%	+++
Canada	1 343	0.5%	2 518	0.9%	1 550	0.7%	1 816	0.8%	378	0.7%	- 18.7%
Serbia	1 134	0.4%	1 052	0.4%	931	0.4%	956	0.4%	344	0.6%	+++
Norway	153	0.1%	125	0.0%	335	0.1%	540	0.2%	135	0.2%	+ 89.1%
Hong Kong	70	0.0%	0	0.0%	25	0.0%	0	0.0%	101	0.2%	+++
China	30	0.0%	26	0.0%	0	0.0%	22	0.0%	97	0.2%	+++
Chile	356	0.1%	392	0.1%	168	0.1%	238	0.1%	90	0.2%	+++
<i>Other Destinations</i>	3 445	1.2%	5 329	2.0%	1 080	0.5%	985	0.4%	126	0.2%	
Total to Third Countries	278 704		273 073		223 586		221 304		55 147		
% change			- 2%		- 18%		- 1%		+ 6.3%		

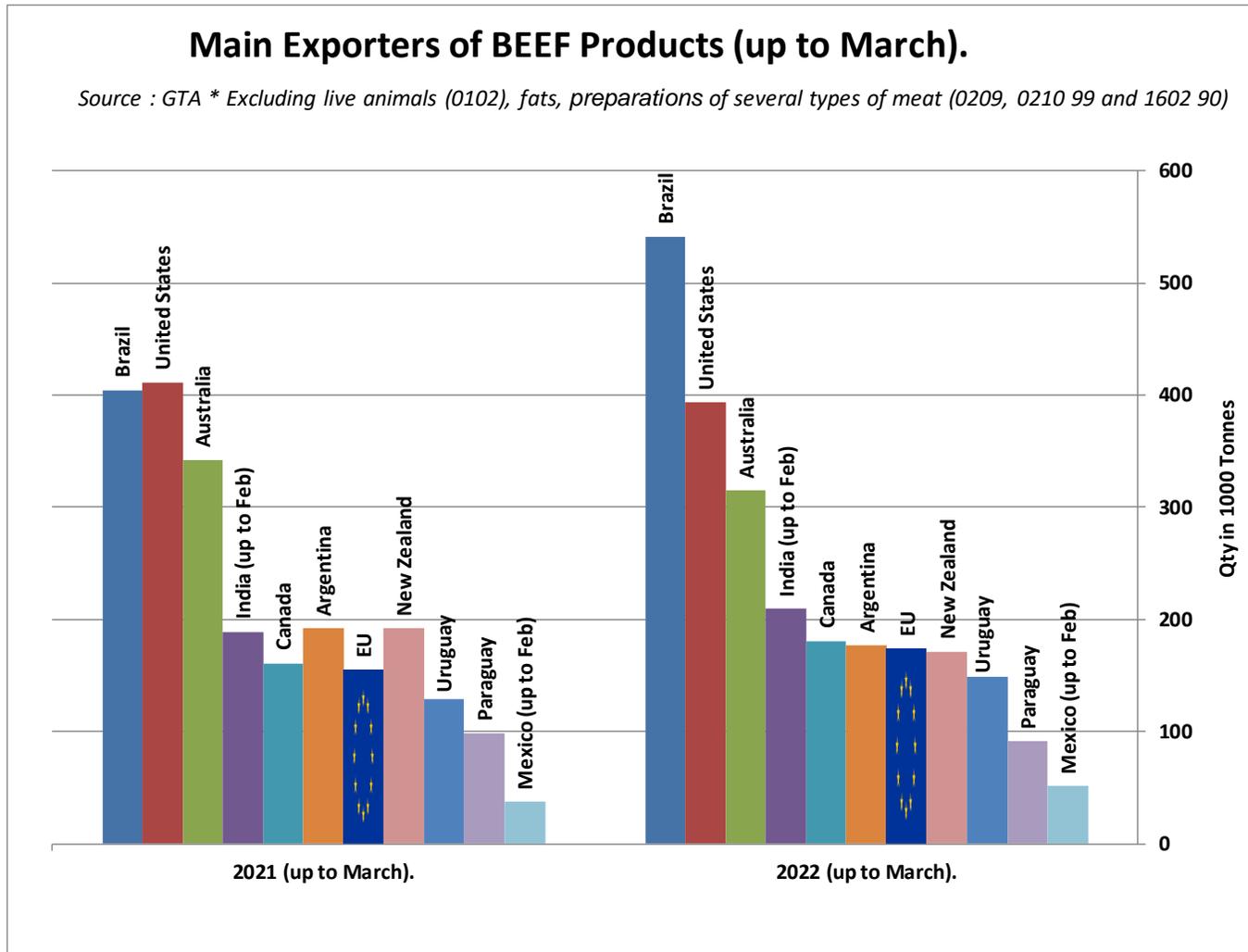
WORLD BEEF MARKET

E.U. + UK IMPORTS BEEF MAIN IMPORTERS



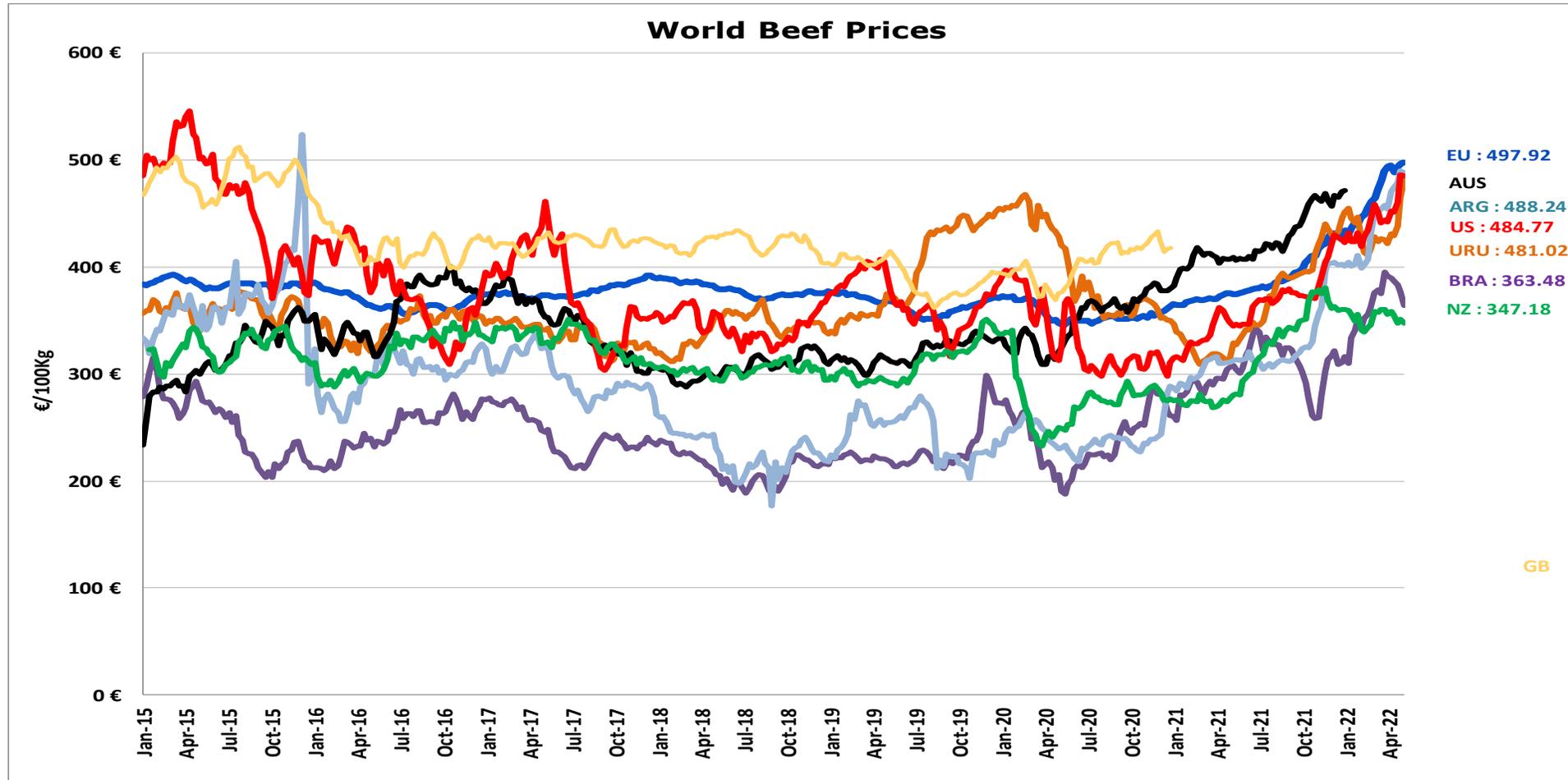
WORLD BEEF MARKET

E.U. + UK EXPORTS BEEF MAIN EXPORTERS



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/ls-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
- BR <http://www.pecuaria.com.br/cotacoes.php>
- NZ 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

And

Agri-FOOD data portal:

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

Thank you



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