



BEEF & VEAL MARKET SITUATION



Meat Market Observatory 30 May 2022

PRODUCTION

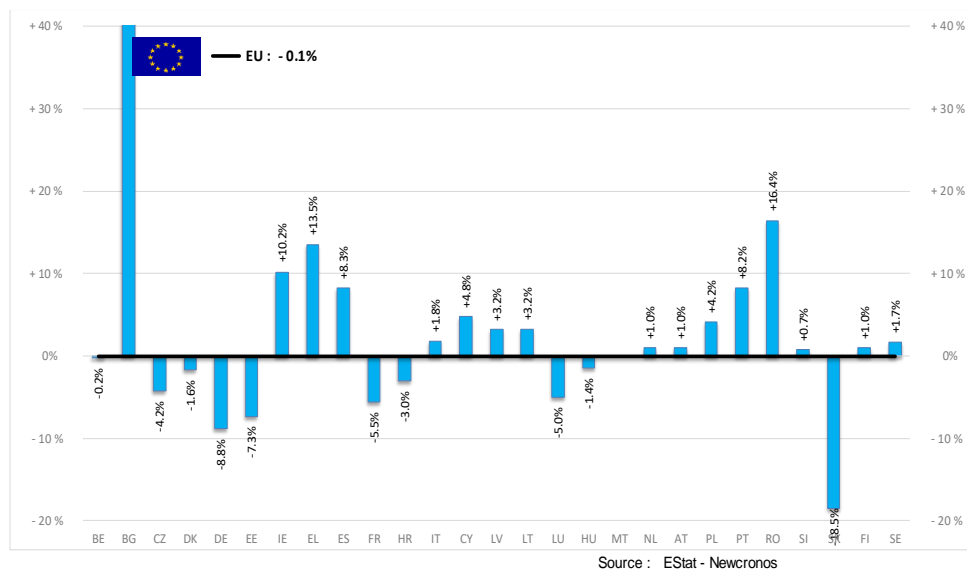
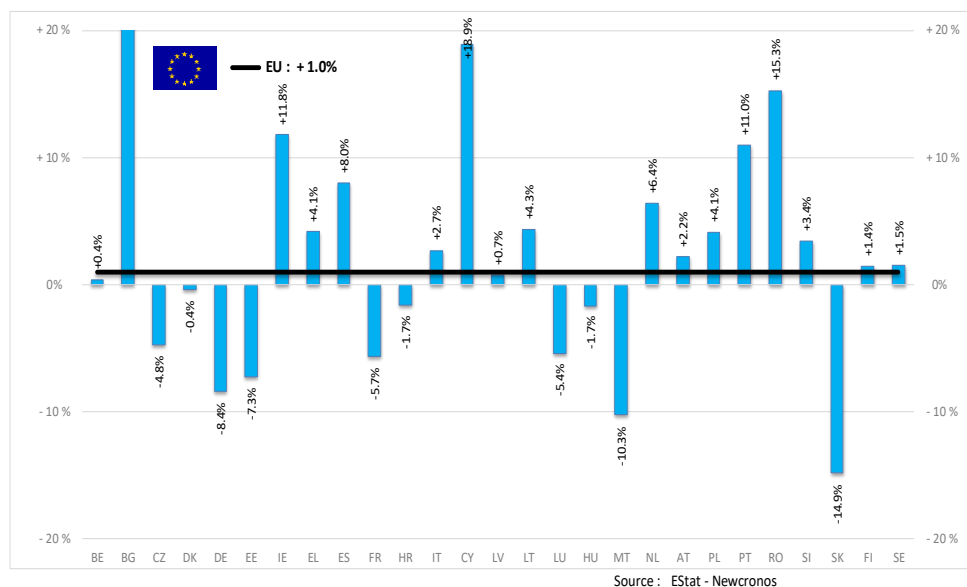
% EVOLUTION

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%

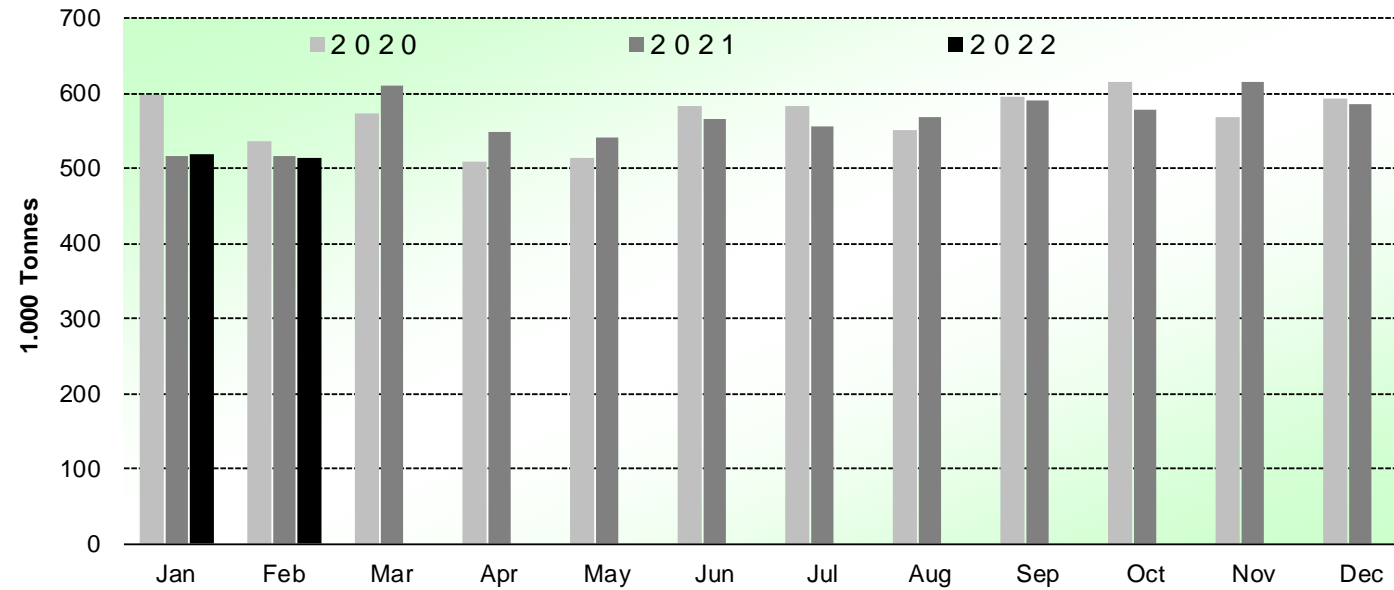
Estimates for last month of period :



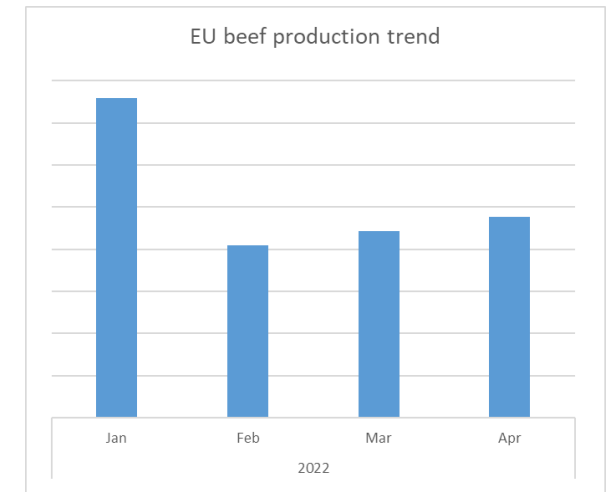
PRODUCTION

HISTORIC TONNES

Beef & Veal Production (EU Slaughtering) - Tonnes



Source : EStat-Newcronos



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

PRICES CARCASSES

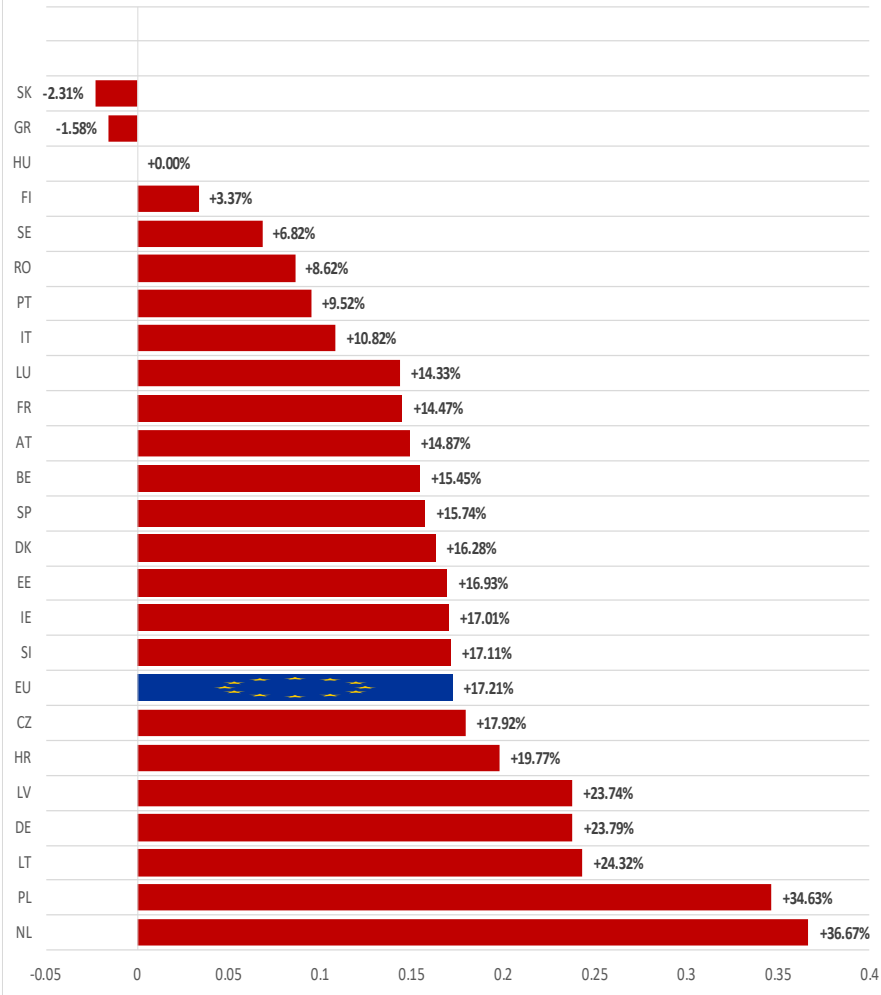
Dashboard

EU Prices week		19	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	498.0	€/100 kg	+ 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	€/head	+ 2.2%	+ 18.4%	+ 36.3%
	Male Calves Beef Type	249.0		+ 1.2%	+ 5.7%	+ 18.0%
	Young Store Cattle	3.13	€/kg	+ 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

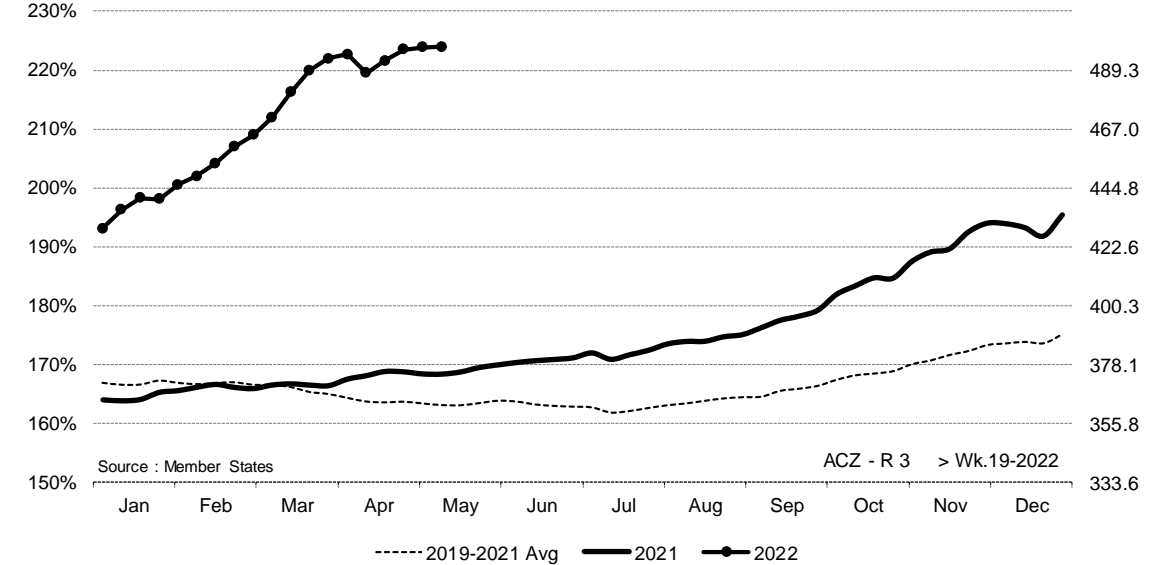


EU EVOLUTION A/C/Z . R3

ACZ - R 3 > Wk.19-2022

% of Reference Price

€/100 kg cwe



Price in week 19 : **498.03**

% change y/y : **+ 33.10%**

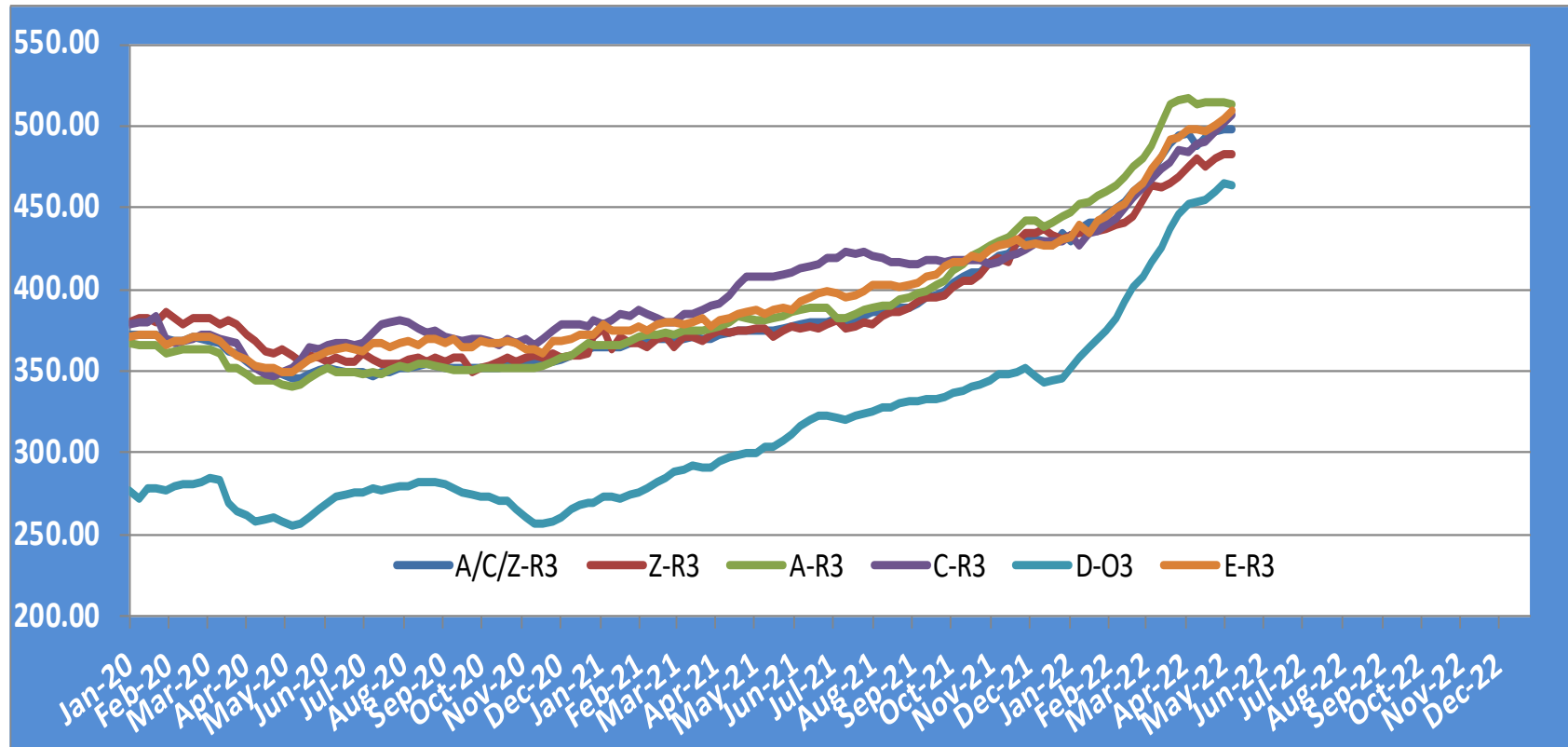
% Ref. Price in wk 0 : **223.9%**

Average price in April 2022 : **493.20**

% change y/y : **+ 32.08%**

PRICES CARCASSES

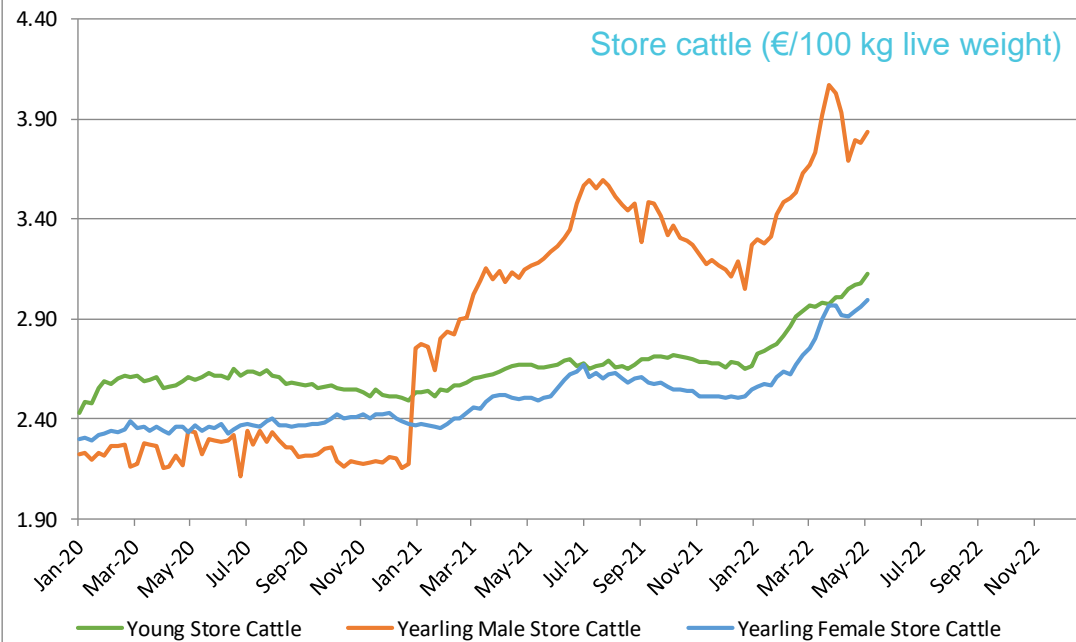
EU EVOLUTION
All CAT GLOBAL VIEW



PRICES LIVE BOVINES

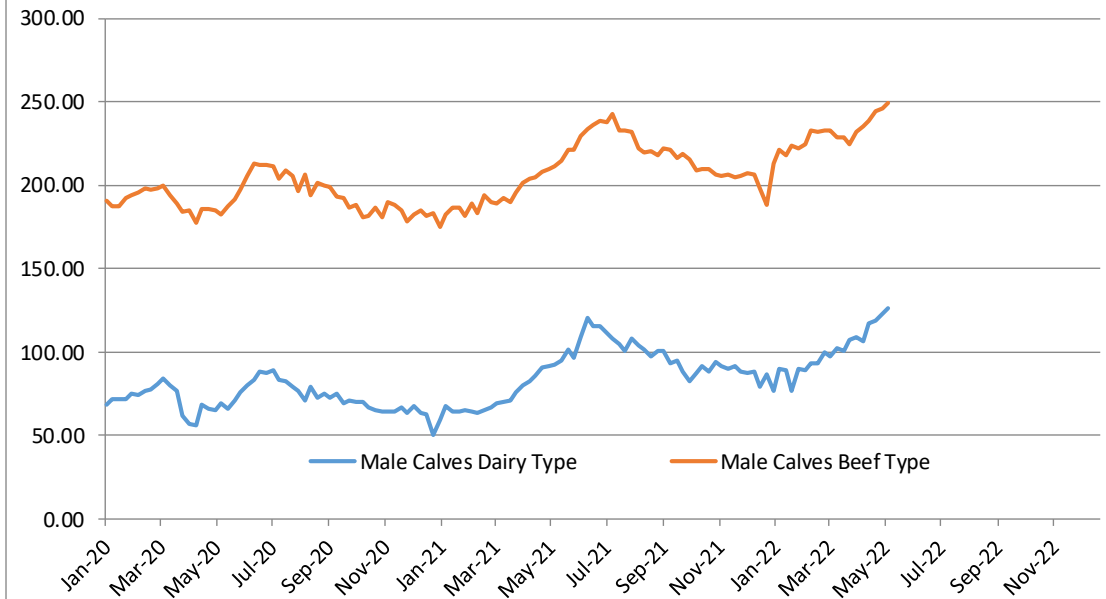
EU EVOLUTION STORE CATTLE

Young Store Cattle Prices



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 Prices

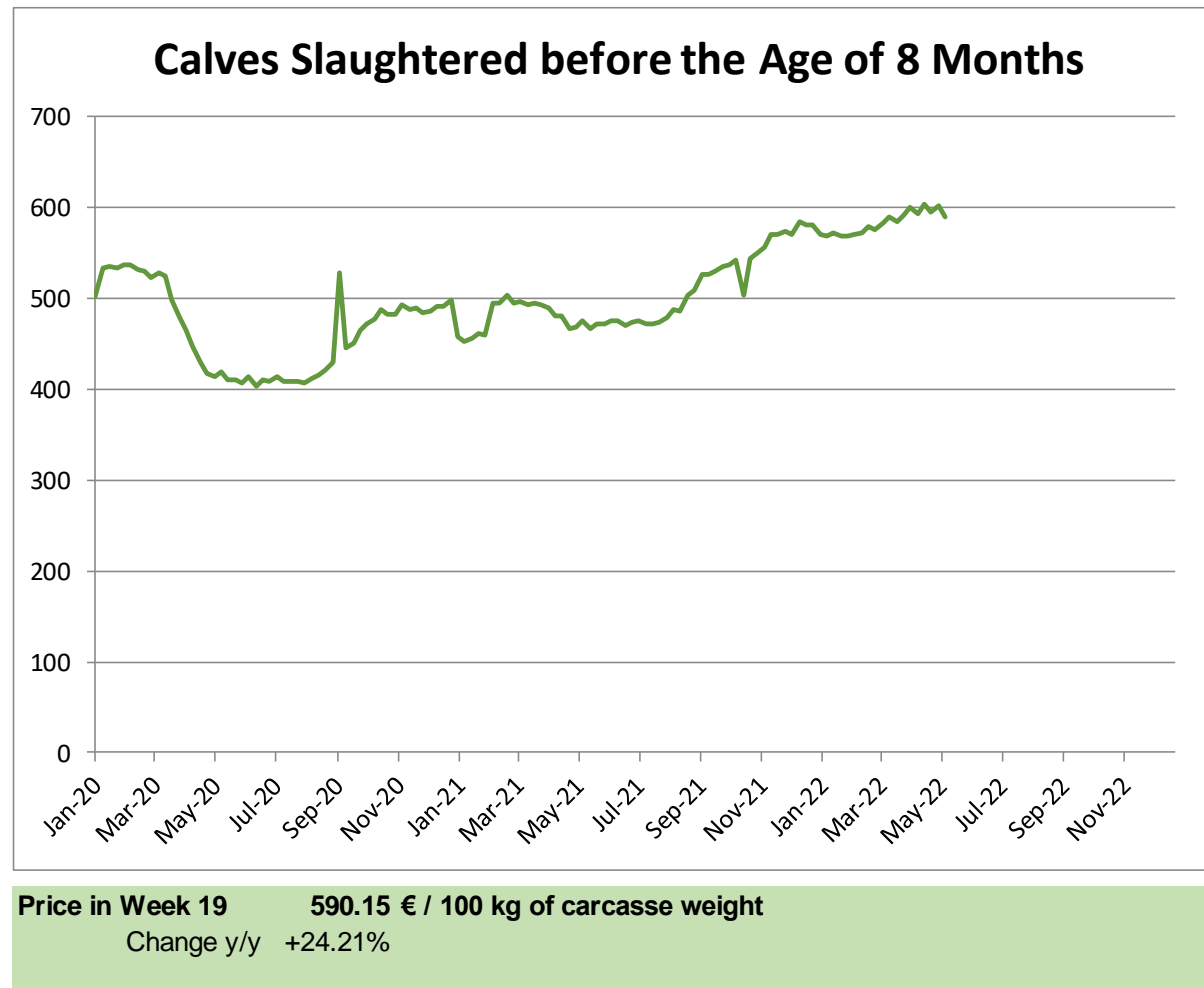


Male Rearing Calves Beef type			Male Rearing Calves Dairy type		
Price in	Week 19	249.07	Price in	Week 19	125.93
Change y/y	+18.05%		Change y/y	+36.27%	

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)

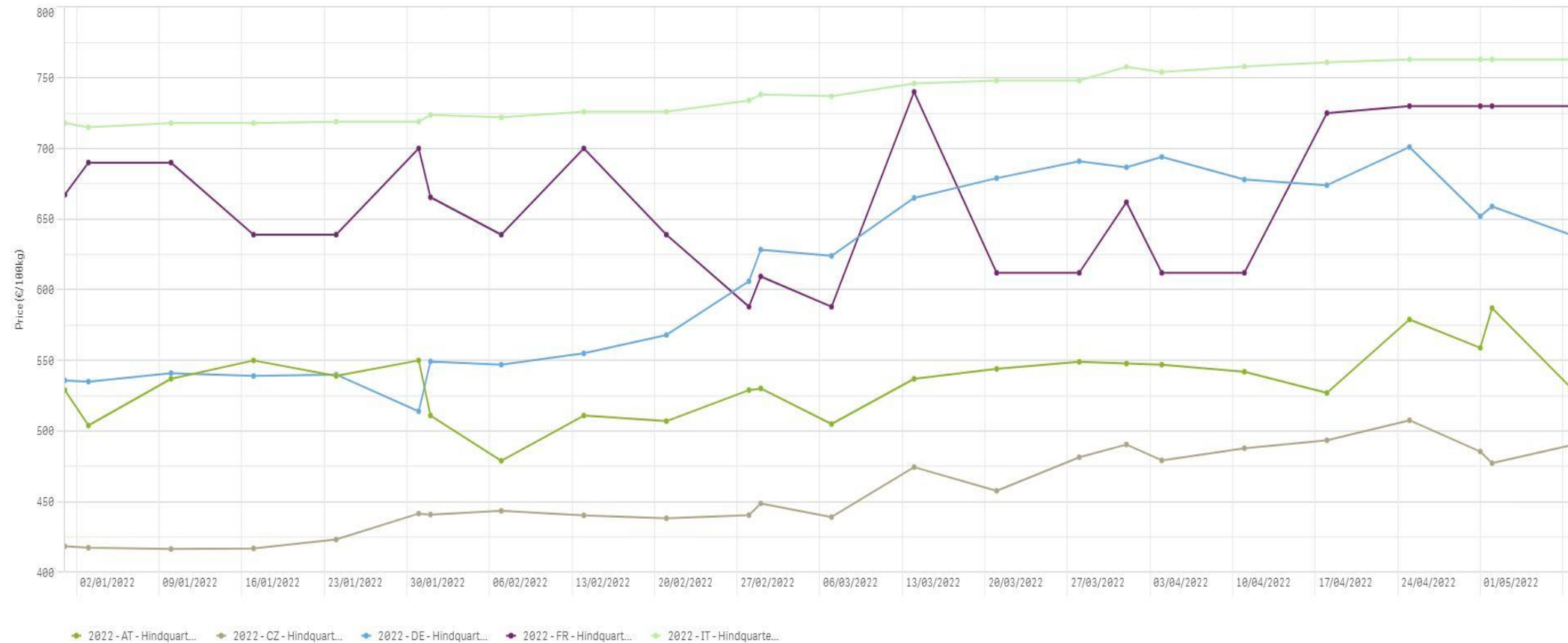


MS notifications – Reg. 2017/1185
Provisional data – subject to changes

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)

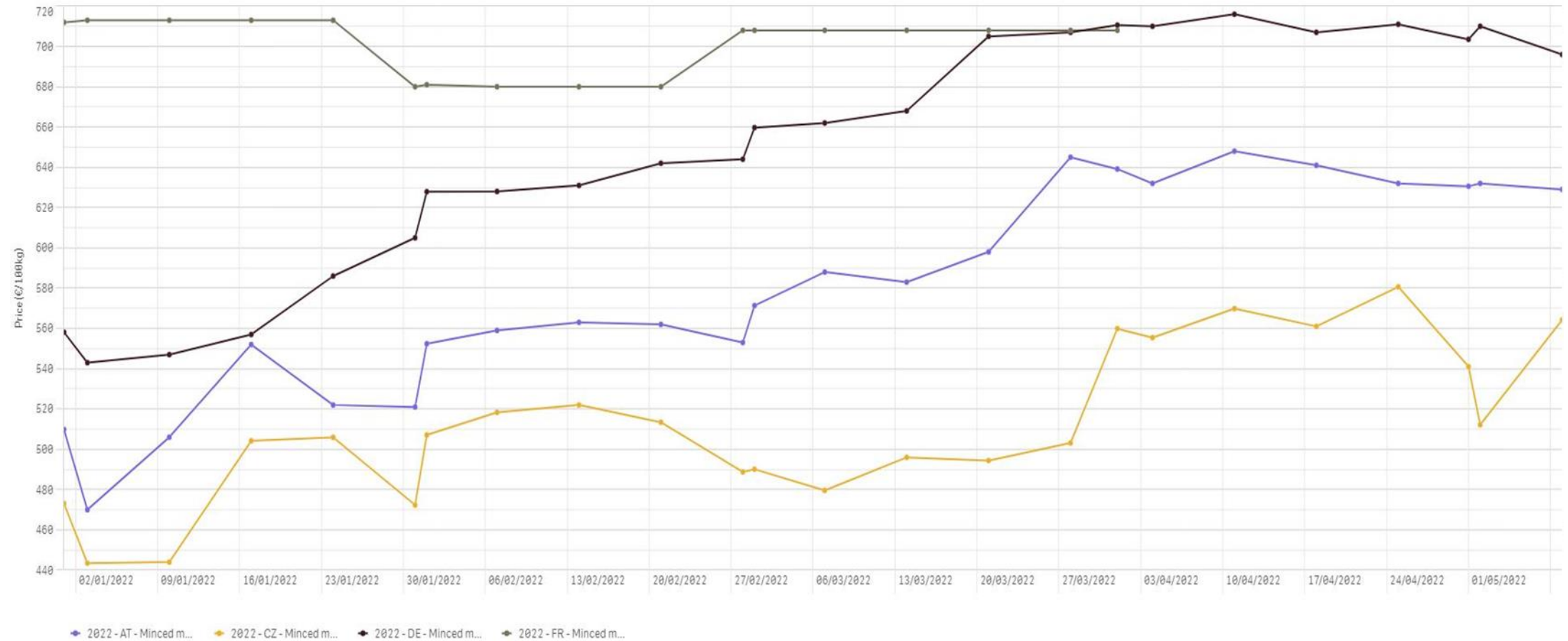


MS notifications – Reg. 2017/1185
Provisional data – subject to changes

BEEF MINCED MEAT SELLING P R I C E S

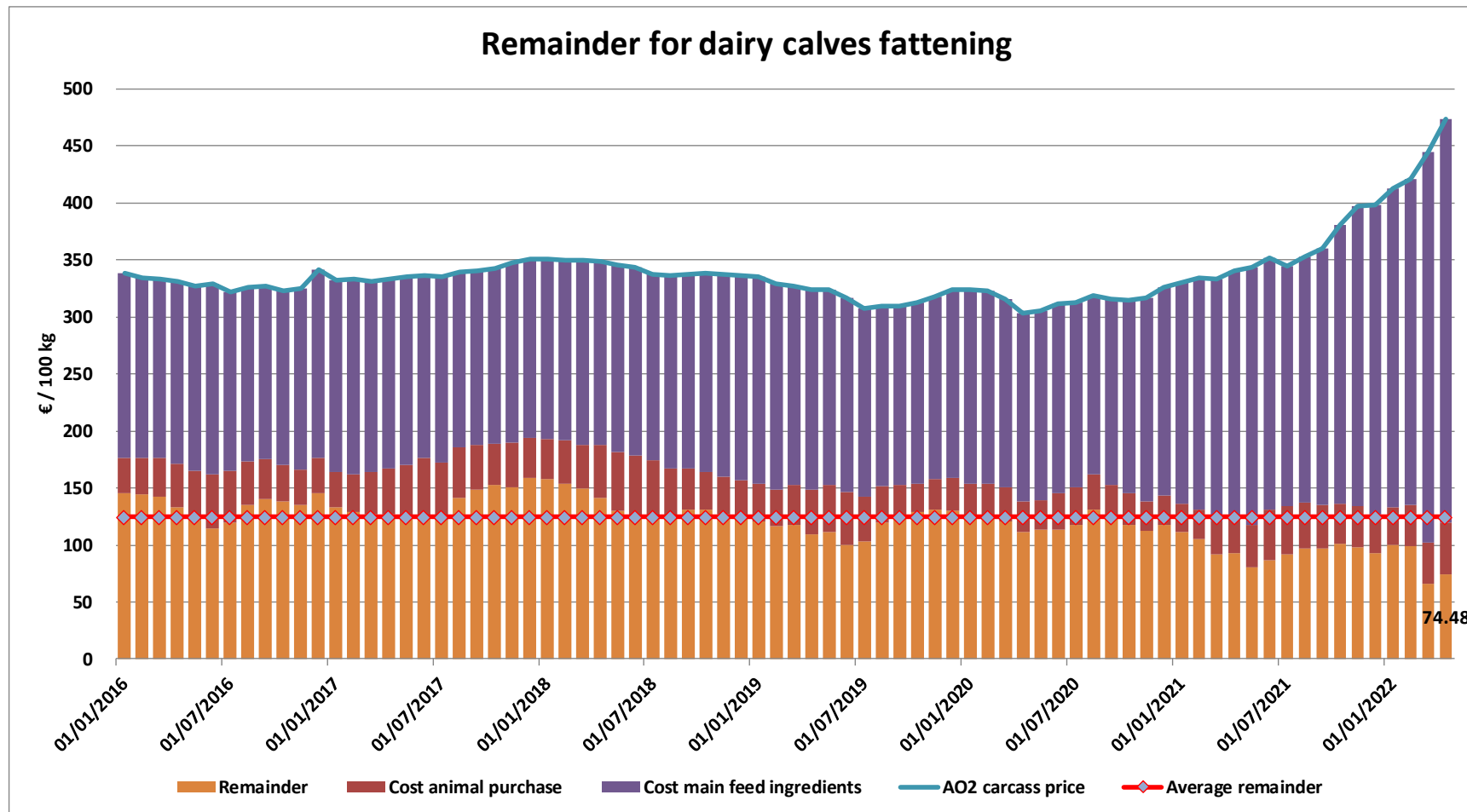
Beef Cuts Price Evolution for Austria, Czechia, France, Germany

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

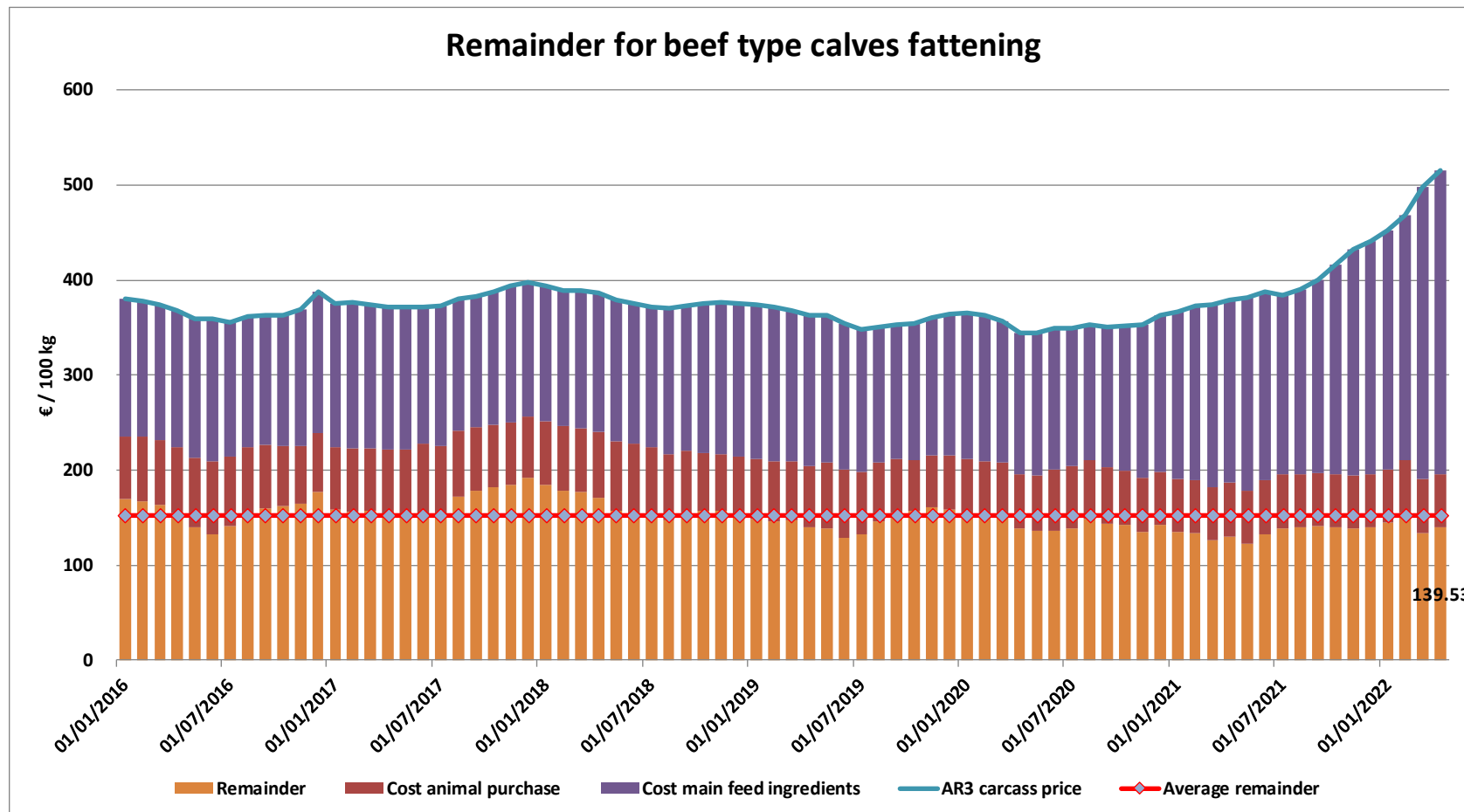


MS notifications – Reg. 2017/1185
Provisional data – subject to changes

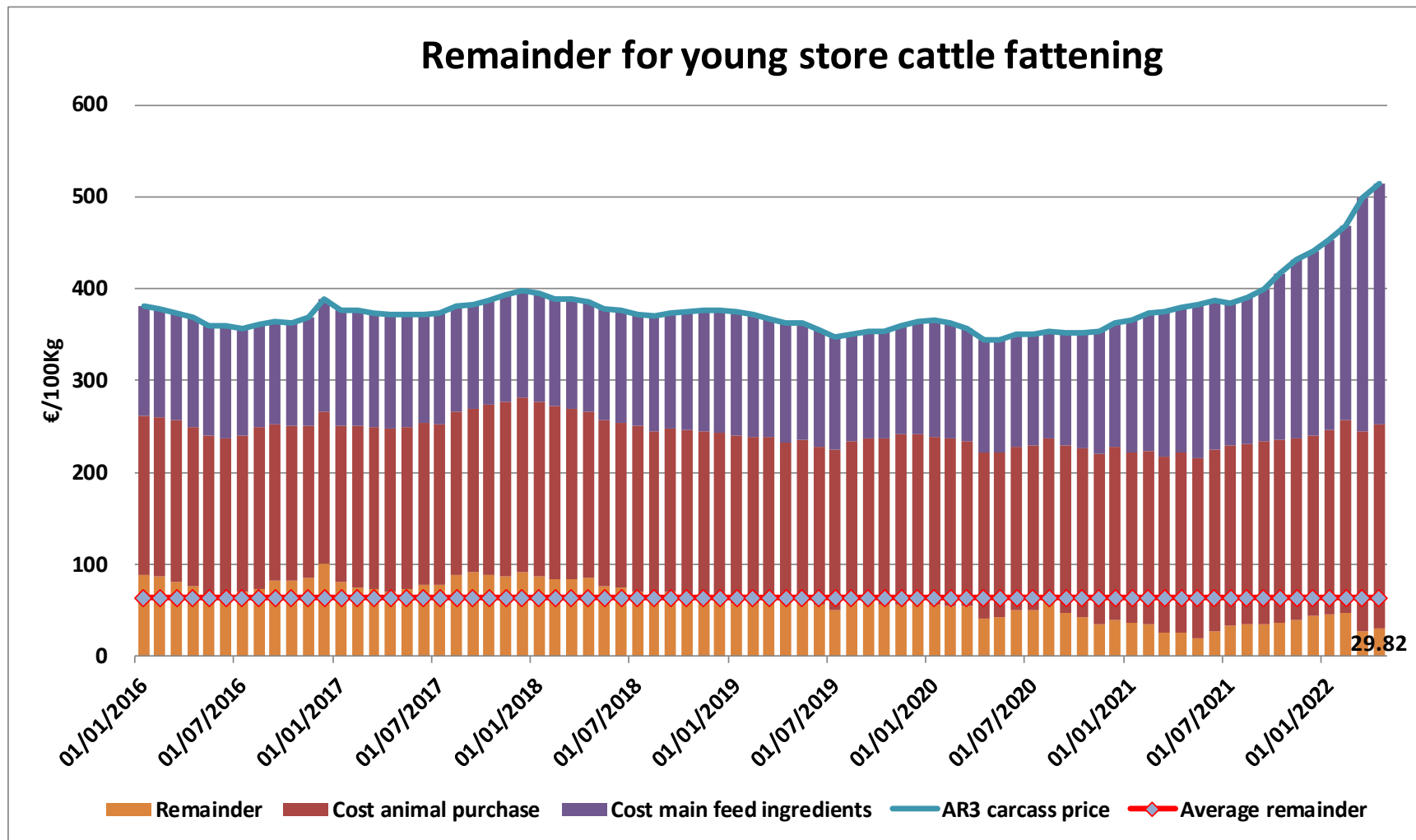
REMAINDERS



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

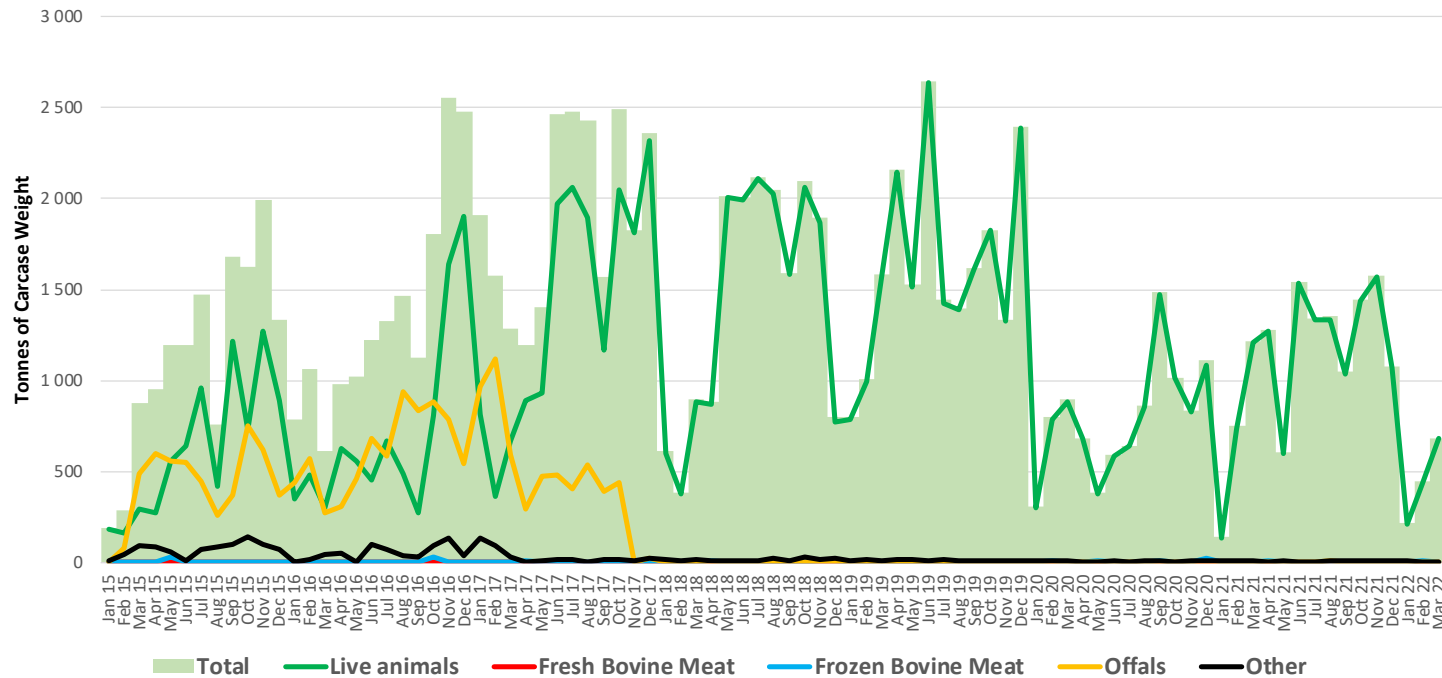
EU Exports of Beef and Live Animals (1): Trade figures (COMEXT – tonnes cwe)

Destinations	2018		2019		2020		2021		Jan-Mar 22		Compared to
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	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%
Other Destinations	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%		

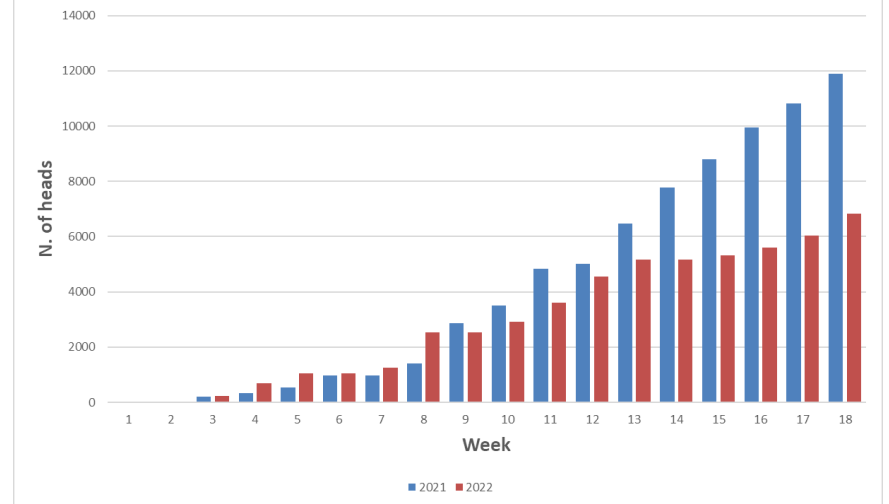
TRADE

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

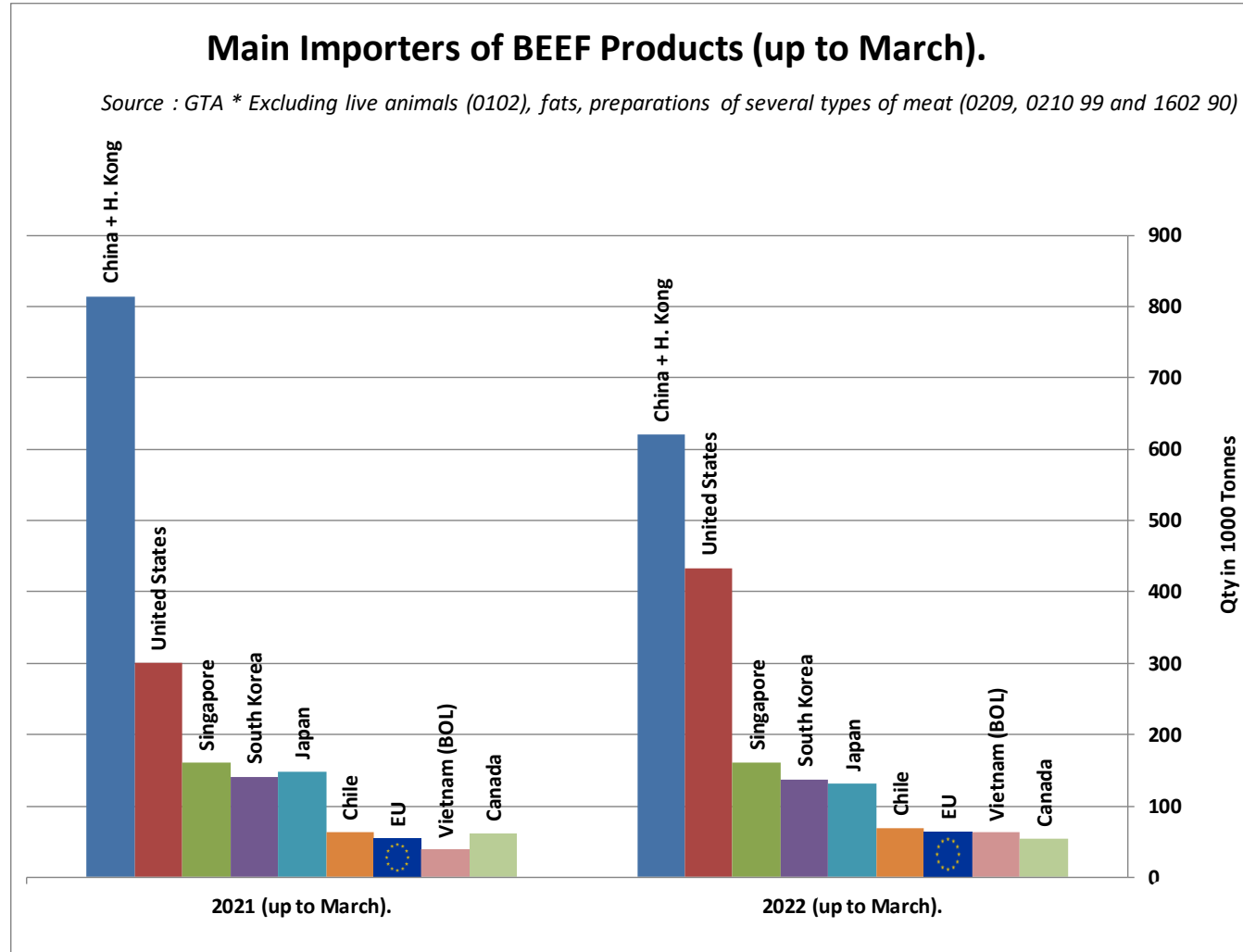
EU Imports of Beef (not including Fats): Trade Figures (COMEXT – tonnes cwe)

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%	+++
Other Destinations	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%		



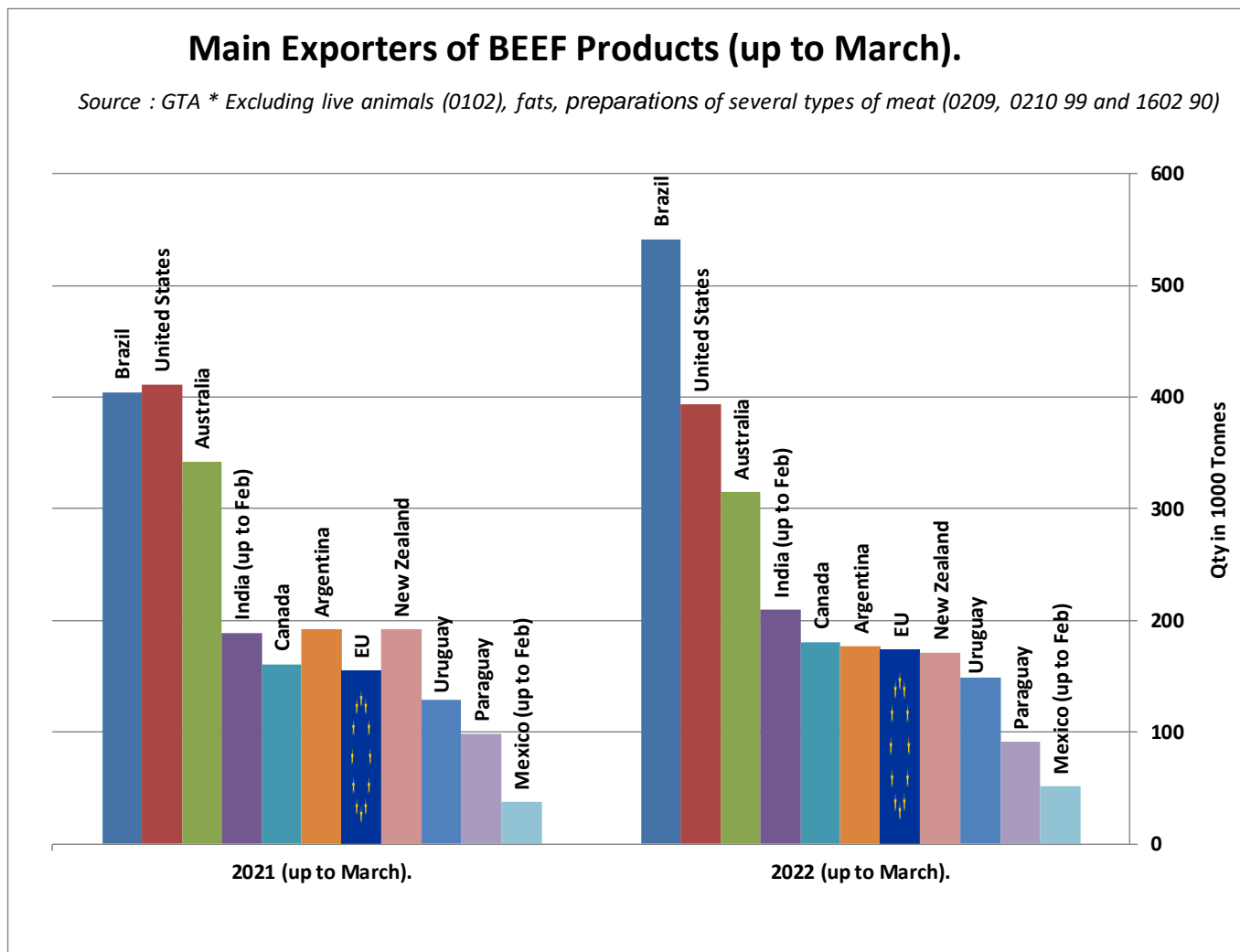
WORLD BEEF MARKET

E.U. + UK IMPORTS BEEF MAIN IMPORTERS



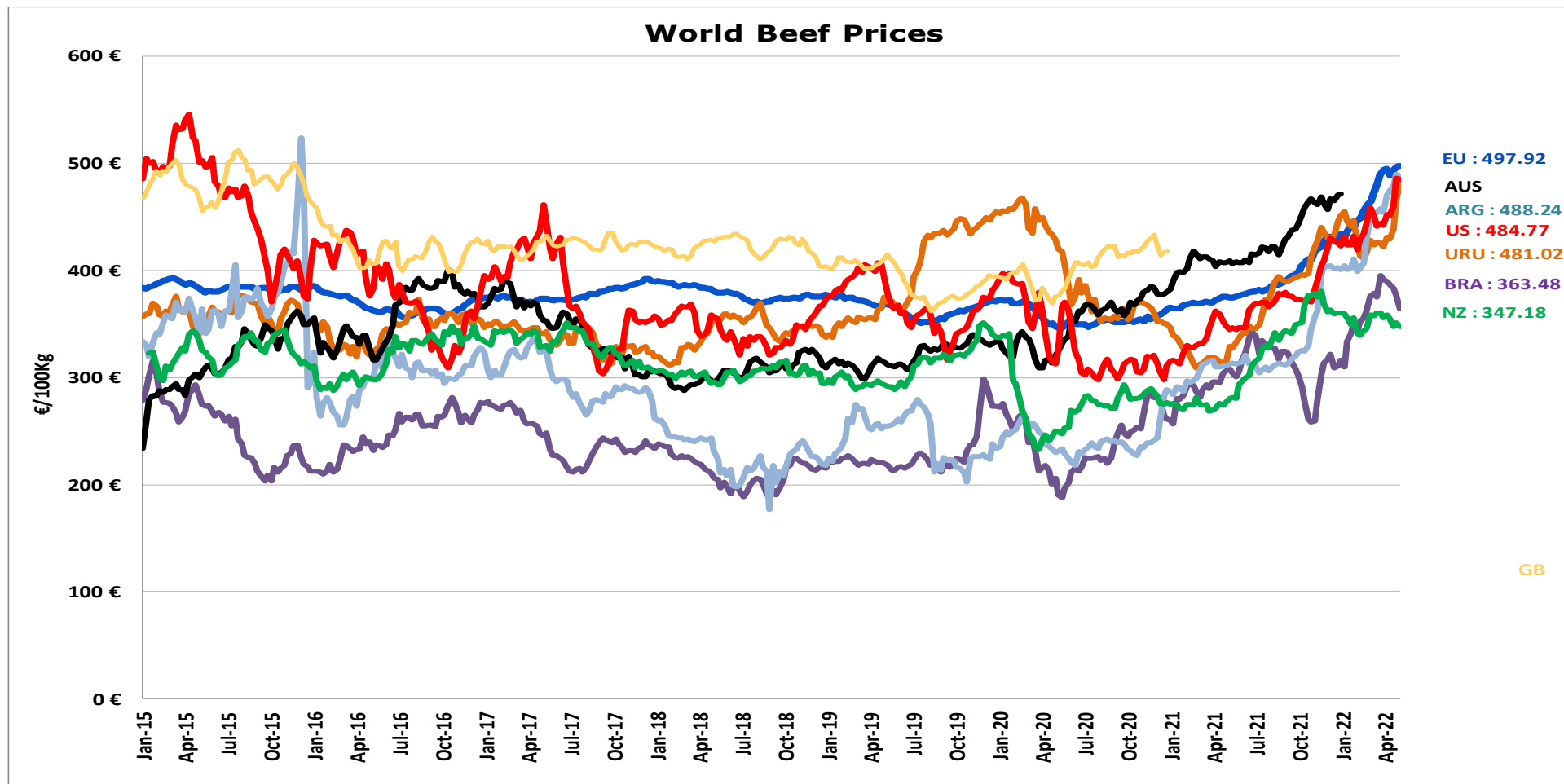
WORLD BEEF MARKET

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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