

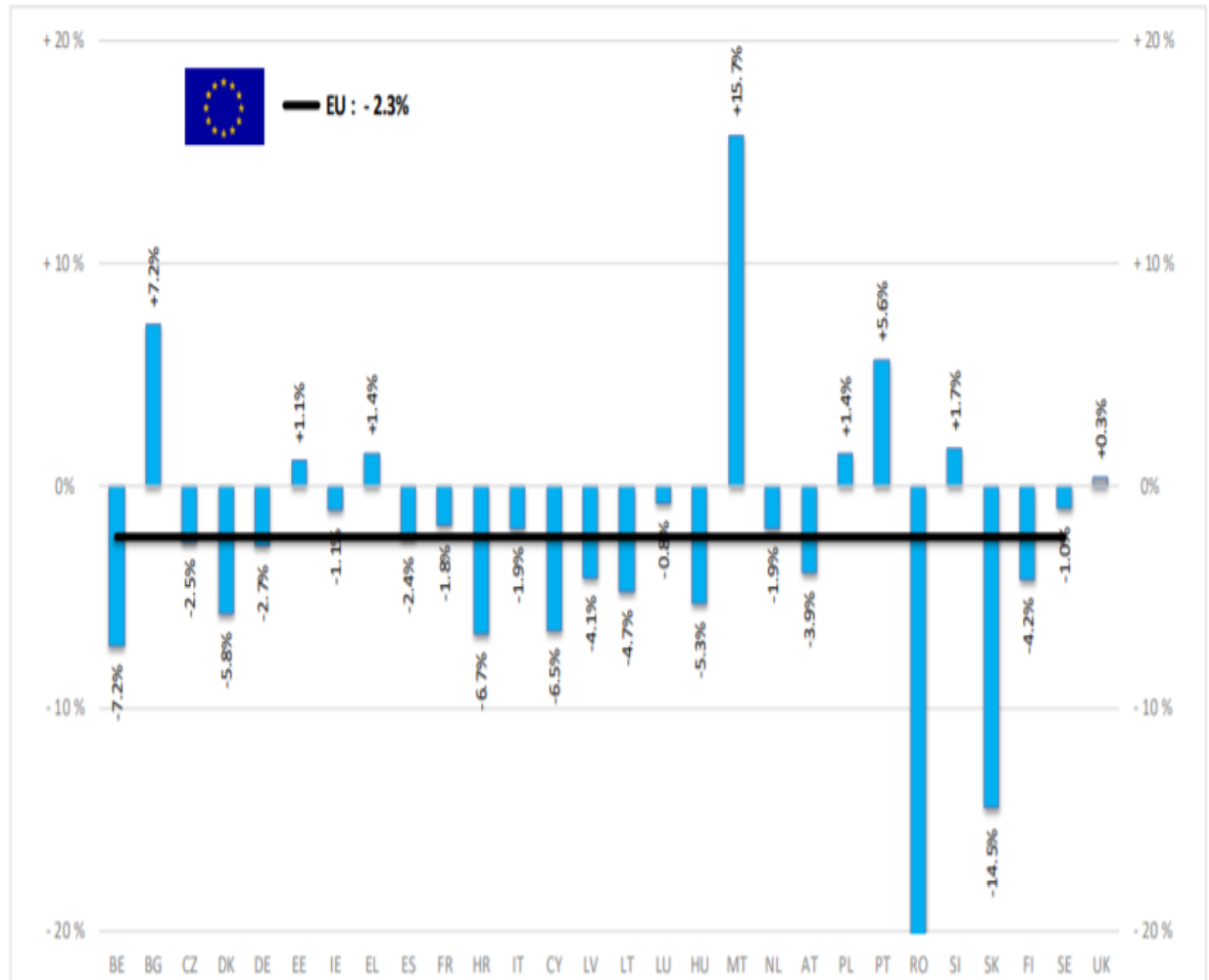


AB SIĞIR VE DANA ETİ PAZAR DURUMU

19 Kasım 2020

BAŞ	HEADS	Jan-Aug 20/19	
		EU	EU + UK
BOĞA	Bull	-2.5%	-2.5%
ÖKÜZ	Bullock	+7.0%	+3.7%
İNEK	Cow	-2.4%	-2.1%
DÜVE	Heifer	+1.3%	+2.0%
BUZAĞI	Calve	-6.5%	-7.3%
GENÇ SİĞİR	Young cattle	-2.9%	-3.0%
Büyükbaş Hayvan Eti	Meat of bovine animals	-2.3%	-2.0%

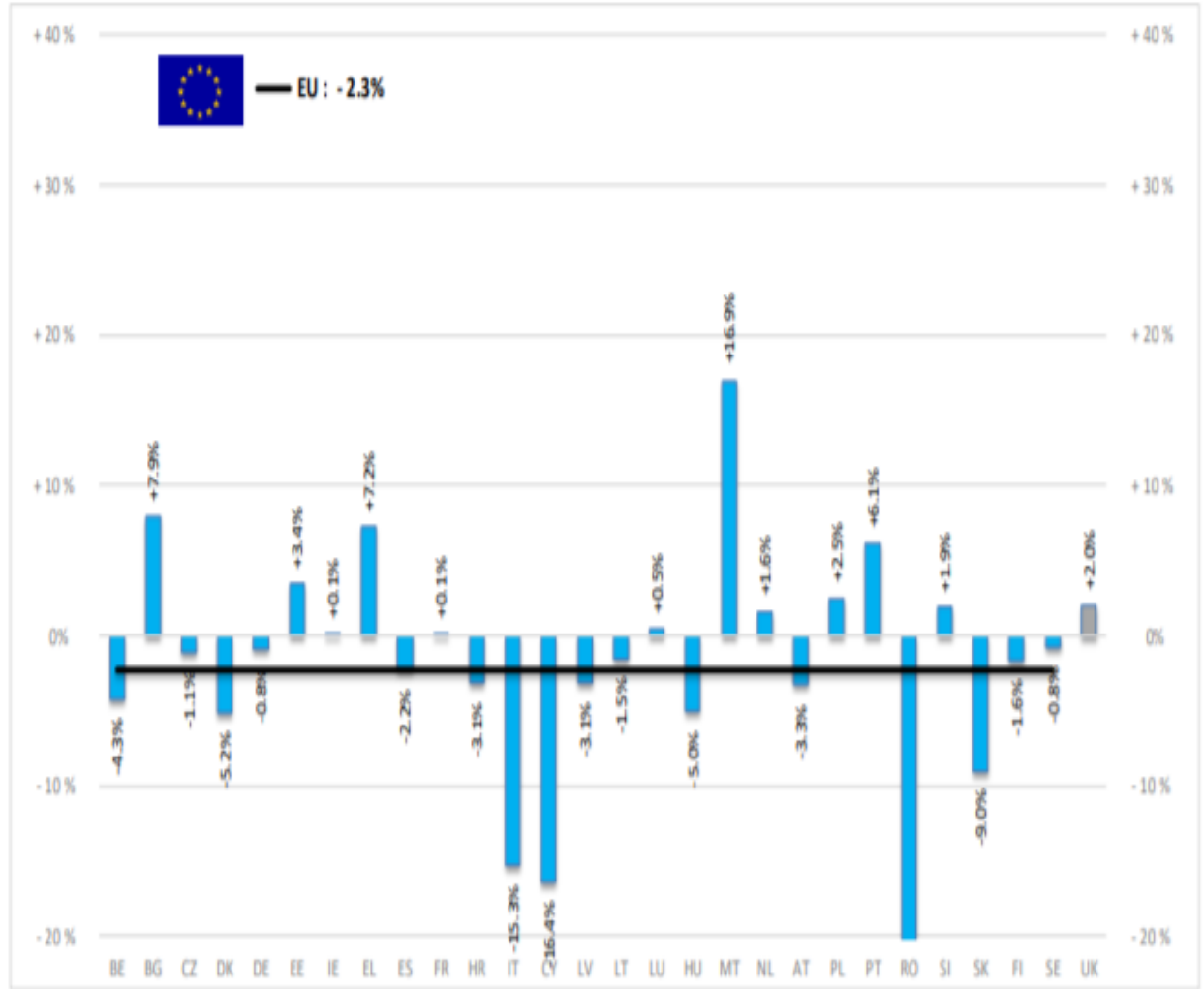
Estimates for last month of period :



Source: EStat - Newcronos

TON	TONNES	Jan-Aug 20/19	
		EU	EU + UK
BOĞA	Bull	-2.6%	-2.7%
ÖKÜZ	Bullock	+9.4%	+4.6%
İNEK	Cow	-2.7%	-2.3%
DÜVE	Heifer	-1.2%	+0.1%
BUZAĞI	Calve	-7.5%	-7.6%
GENÇ SIĞIR	Young cattle	-1.7%	-1.7%
Büyükbaş Hayvan Eti	Meat of bovine animals	-2.3%	-1.8%

Estimates for last month of period :

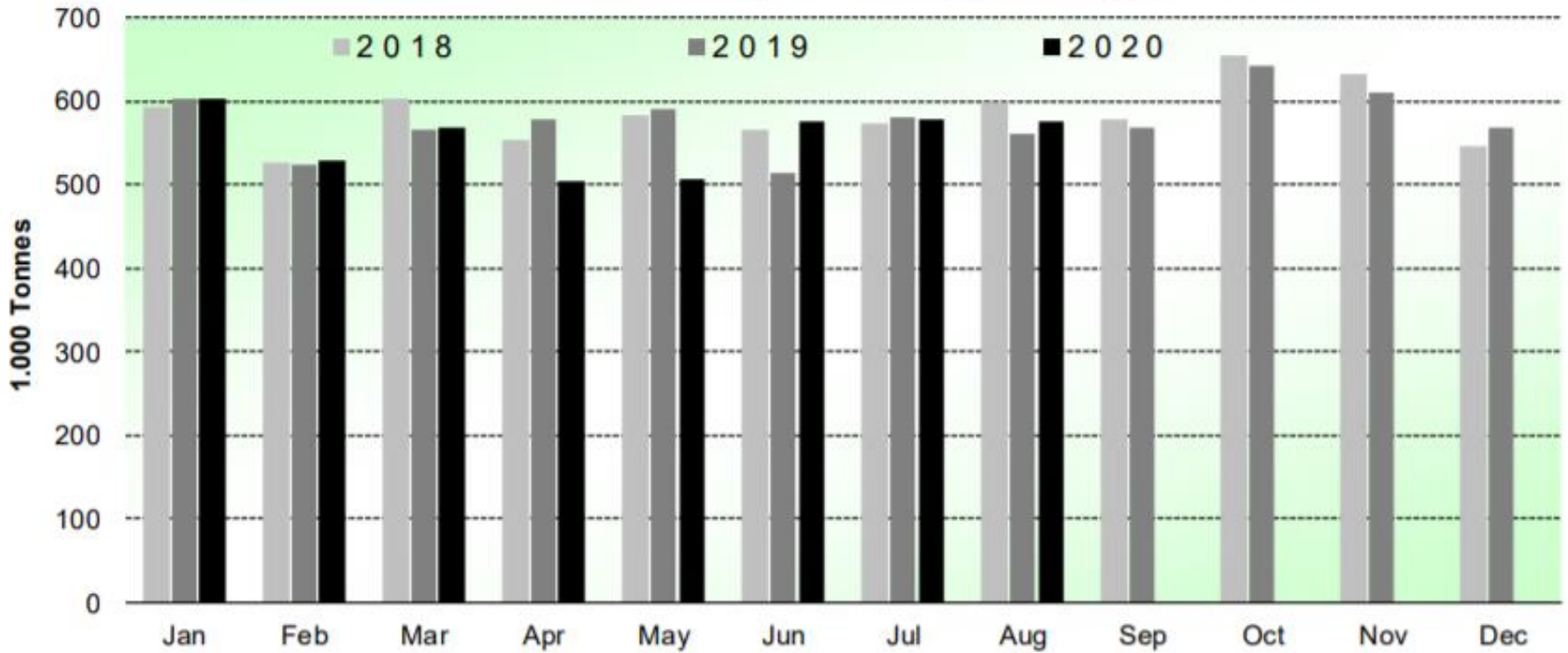


Source : EStat - Newcronos



SIĞIR VE DANA ETİ ÜRETİMİ (AB Kesimler – Ton)

Beef & Veal Production (EU Slaughtering) - Tonnes



Source : EStat-Newcronos



EU Prices week		45	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	352.8	- 0.3%	+ 0.2%	- 2.4%
	Young Bovines (Z)	351.5	+ 0.9%	+ 1.5%	+ 0.9%
	Young Bulls (A)	351.5	- 0.6%	- 0.0%	- 3.1%
	Steers (C)	361.7	- 0.1%	- 0.6%	- 2.2%
	Cows (D)	261.0	- 1.6%	- 4.5%	- 4.0%
	Heifers (E)	362.6	- 1.2%	- 1.1%	- 1.6%
Live Animals	Male Calves Dairy Type	62.47	- 3.8%	- 10.3%	- 6.4%
	Male Calves Beef Type	179.9	- 3.6%	- 4.6%	- 1.0%
	Young Store Cattle	2.39	- 0.2%	- 0.7%	+ 0.7%
	Yearling Male Store Cattle	2.18	- 0.5%	- 5.5%	- 1.6%
	Yearling Female Store Cattle	2.41	+ 0.0%	+ 0.3%	+ 4.2%
	Calves slaughtered <8M	482.6	- 0.1%	+ 2.3%	- 6.0%

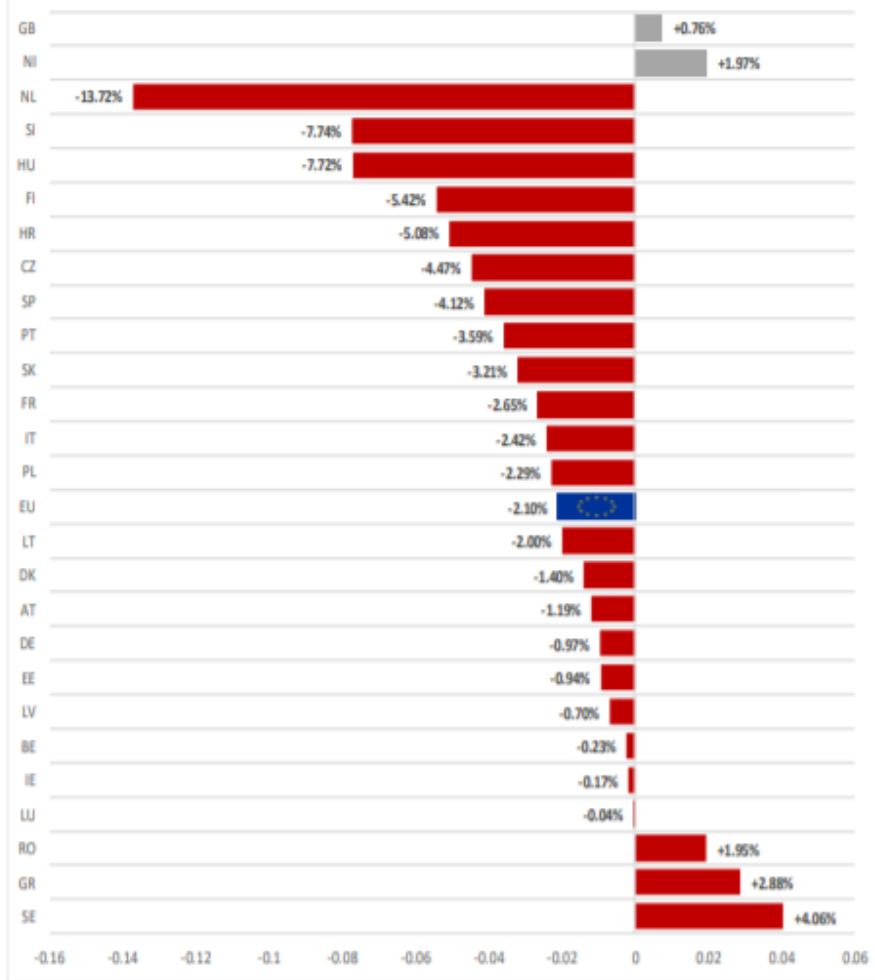
Sources : MSs notifications (Regulation (EU) 1182/2017 and 1184/2017)

KARKAS FİYATLARI

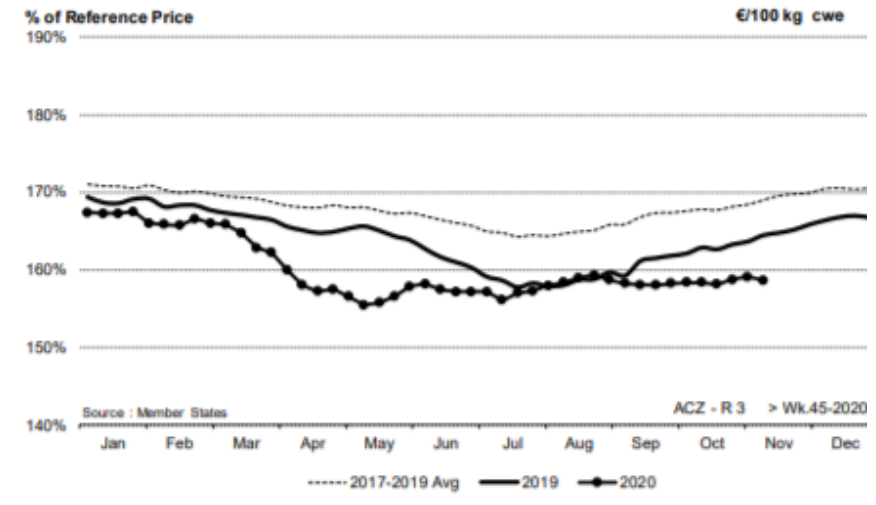
AB DEĞİŞİM A/C/Z. R3



EU ACZ R3 Price Comparison between average monthly price November 2019 - October 2020 compared to November 2018 - October 2019



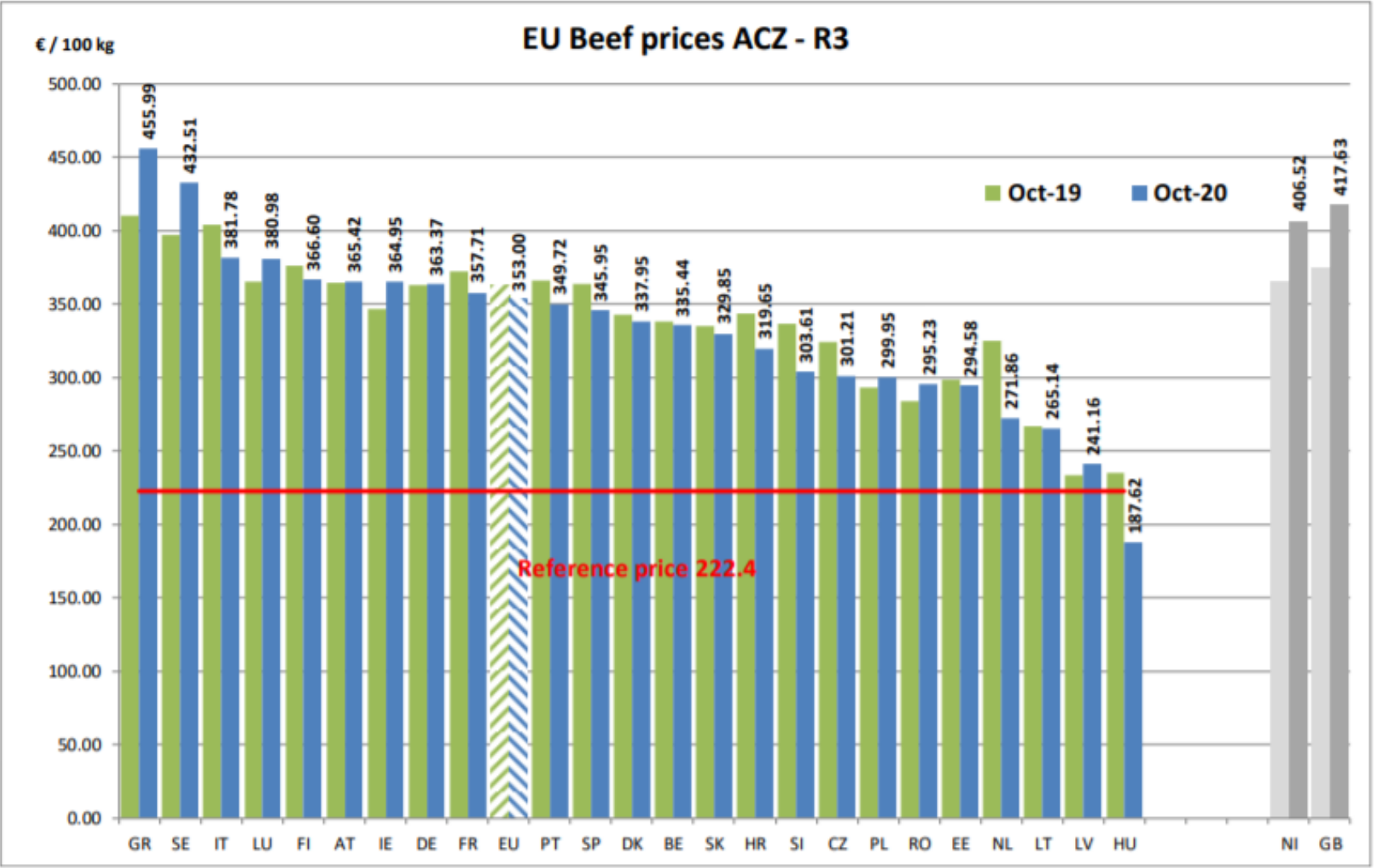
ACZ - R 3 > Wk.45-2020



Price in week 45 :	352.89	Average price in October 2020 :	362.19
% change y/y :	- 3.5%	% change y/y :	- 3.2%
% Ref. Price in wk 45 :	158.7%		

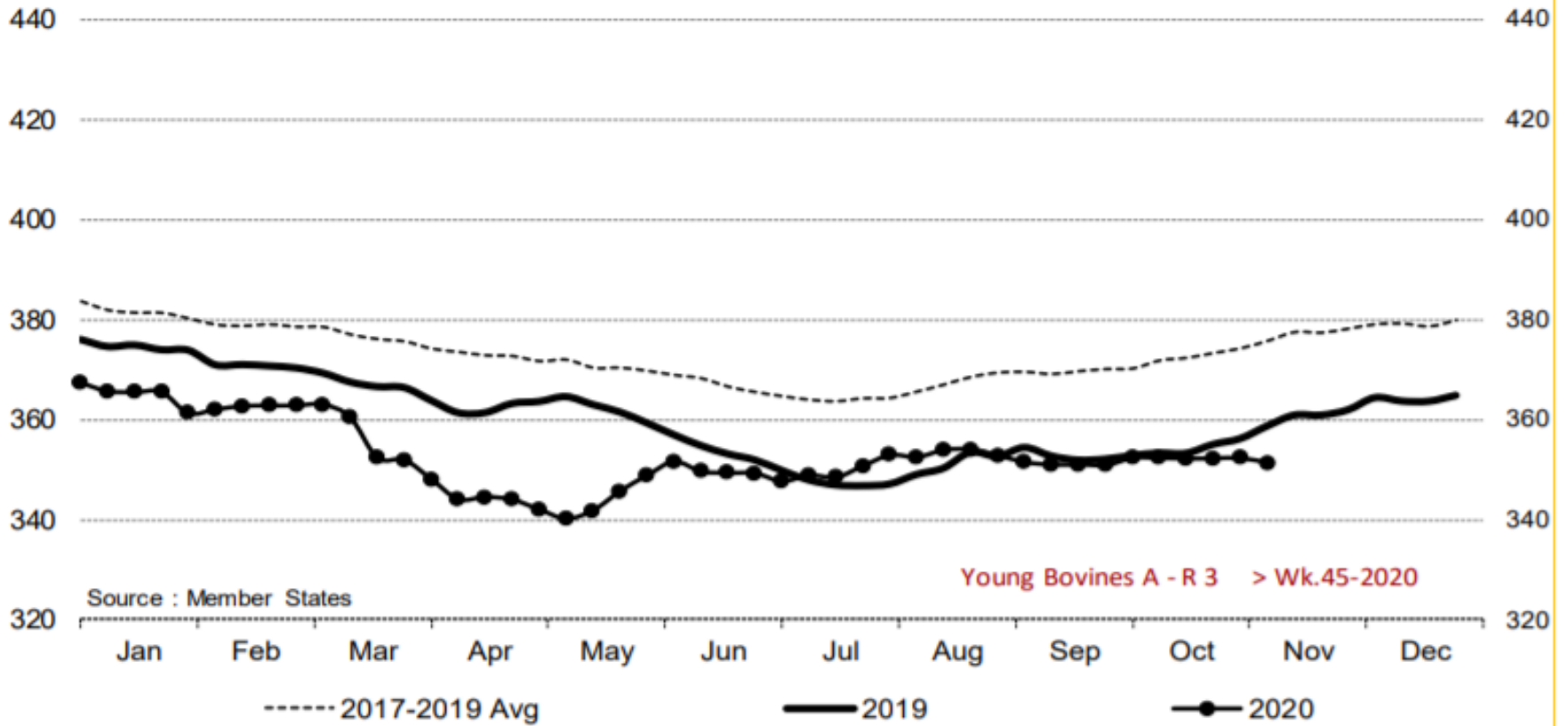
KARKAS FİYATLARI

AB DEĞİŞİM
A/C/Z. R3





Young Bovines A - R 3 > Wk.45-2020

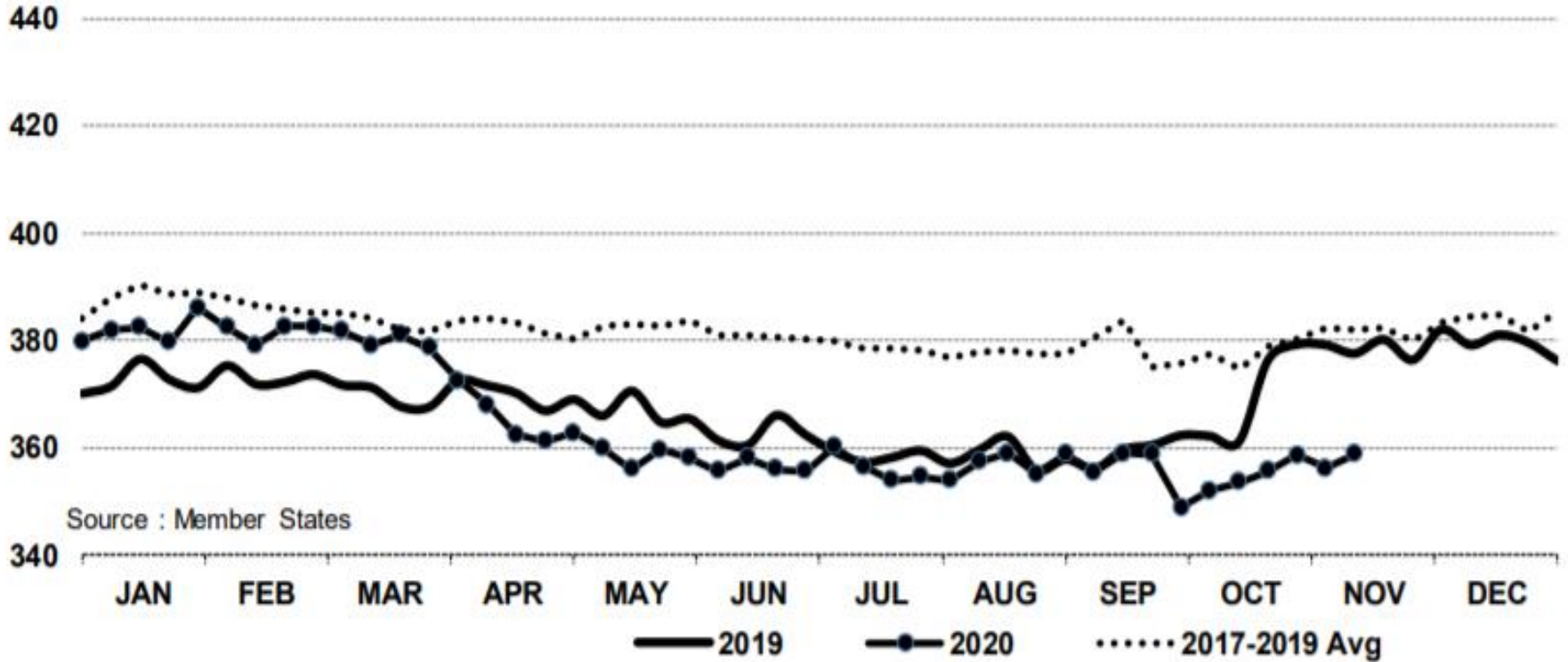


Price in week 45 : **351.30**
% change y/y : **- 2.1%**

Average price in October 2020 : **354.00**
% change y/y : **- 5.6%**

In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.45-2020



Price in week 45 : **358.69**

08/10/2020

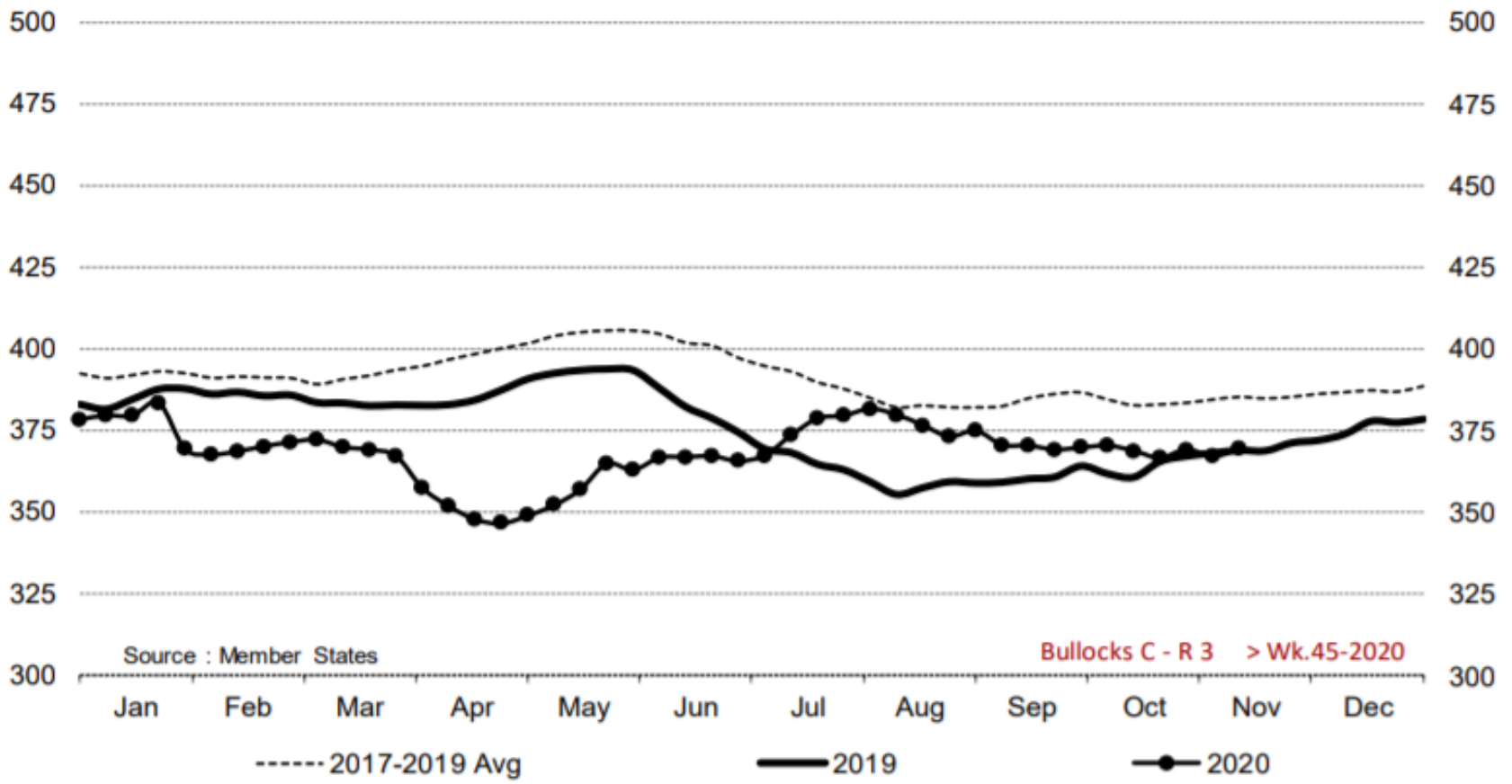
% change y/y : **- 5.0%**

Average price in October 2020 : **371.16**

% change y/y : **+ 0.3%**



Bullocks C - R 3 > Wk.45-2020



Source : Member States

Bullocks C - R 3 > Wk.45-2020

----- 2017-2019 Avg

— 2019

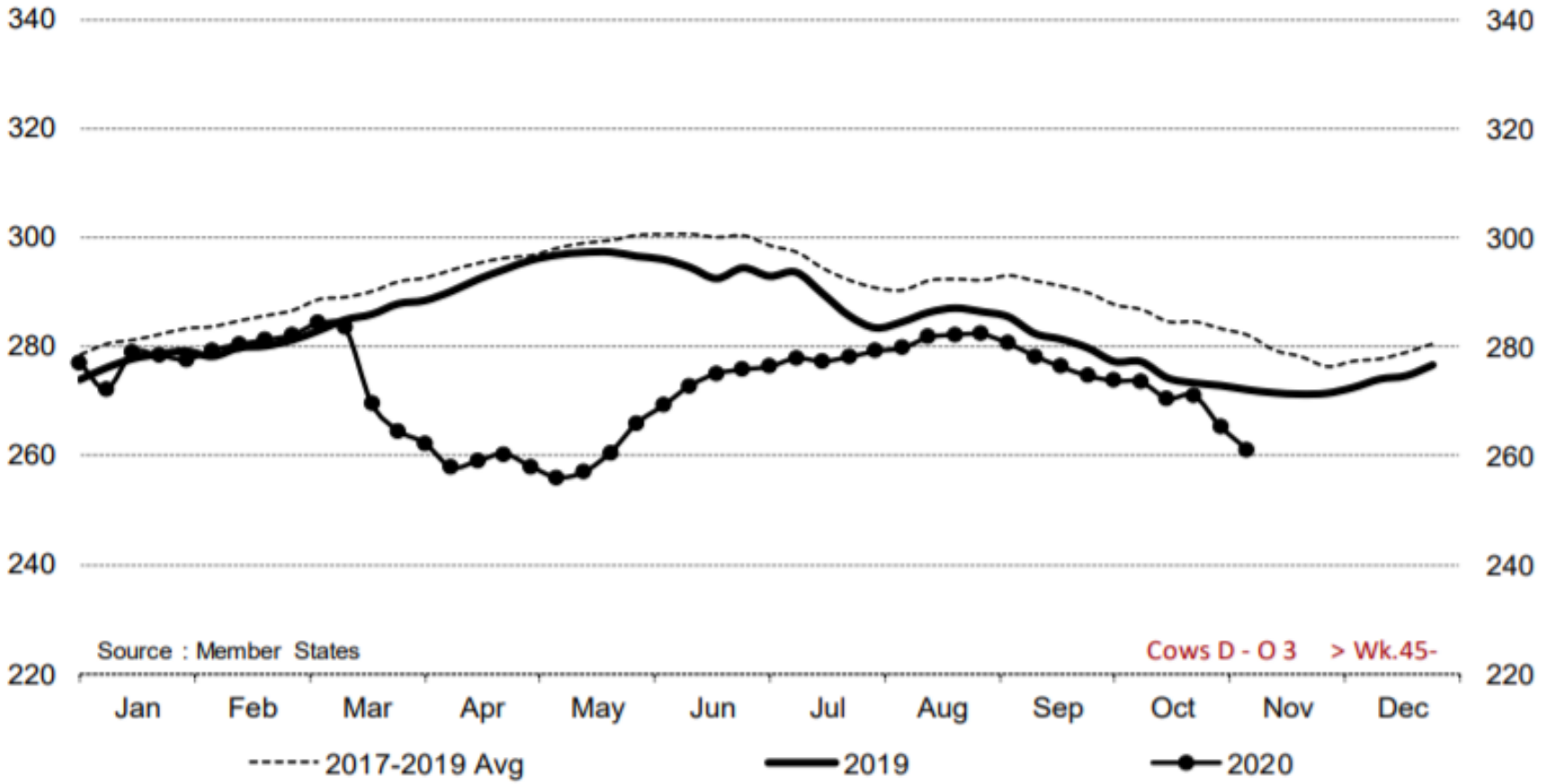
—●— 2020

Price in week 45 : **369.30**
% change y/y : **+ 0.2%**

Average price in October 2020 : **364.07**
% change y/y : **- 7.7%**



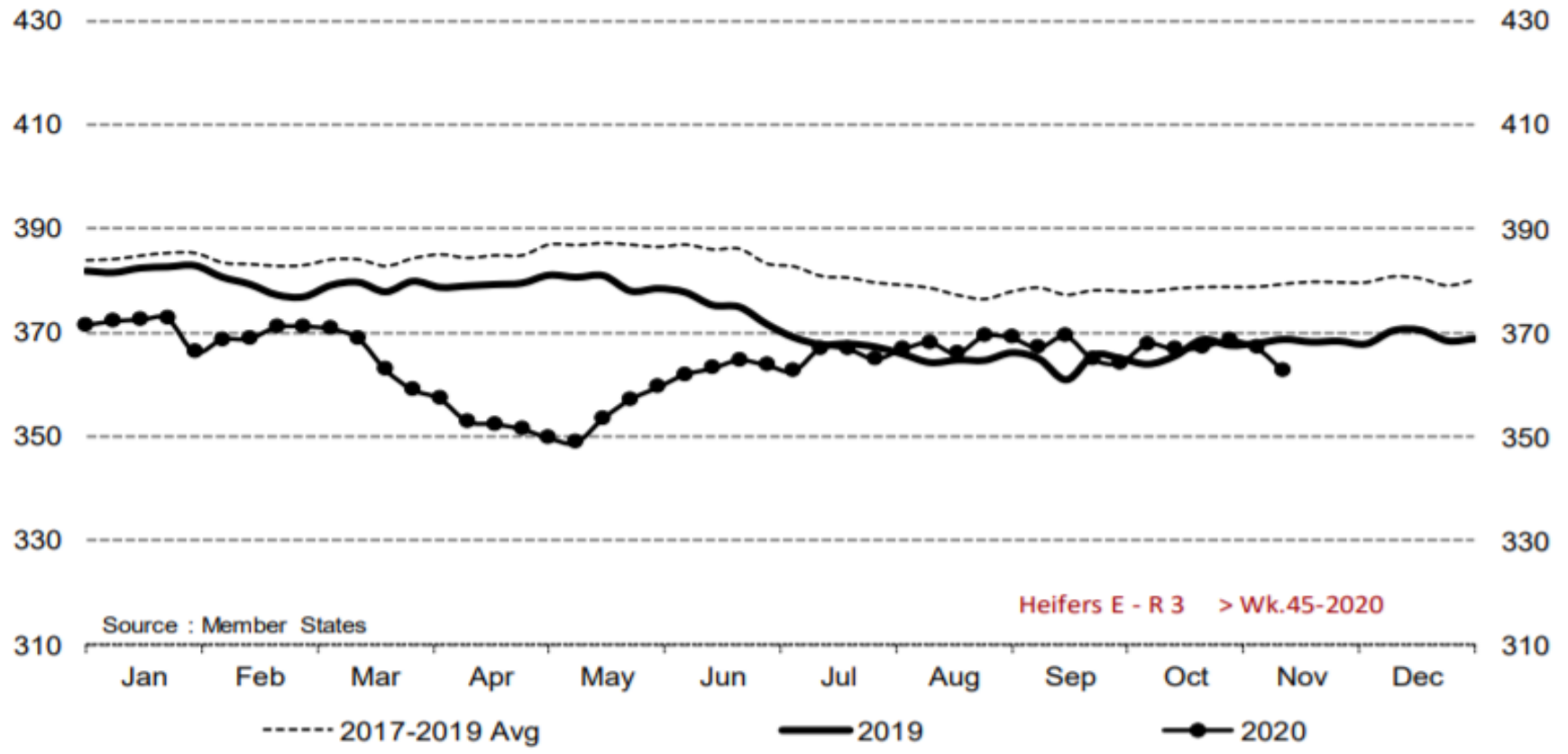
Cows D - O 3 > Wk.45-2020



Price in week 45 : 261.06	Average price in October 2020 : 274.99
% change y/y : - 4.0%	% change y/y : - 3.5%



Heifers E - R 3 > Wk.45-2020

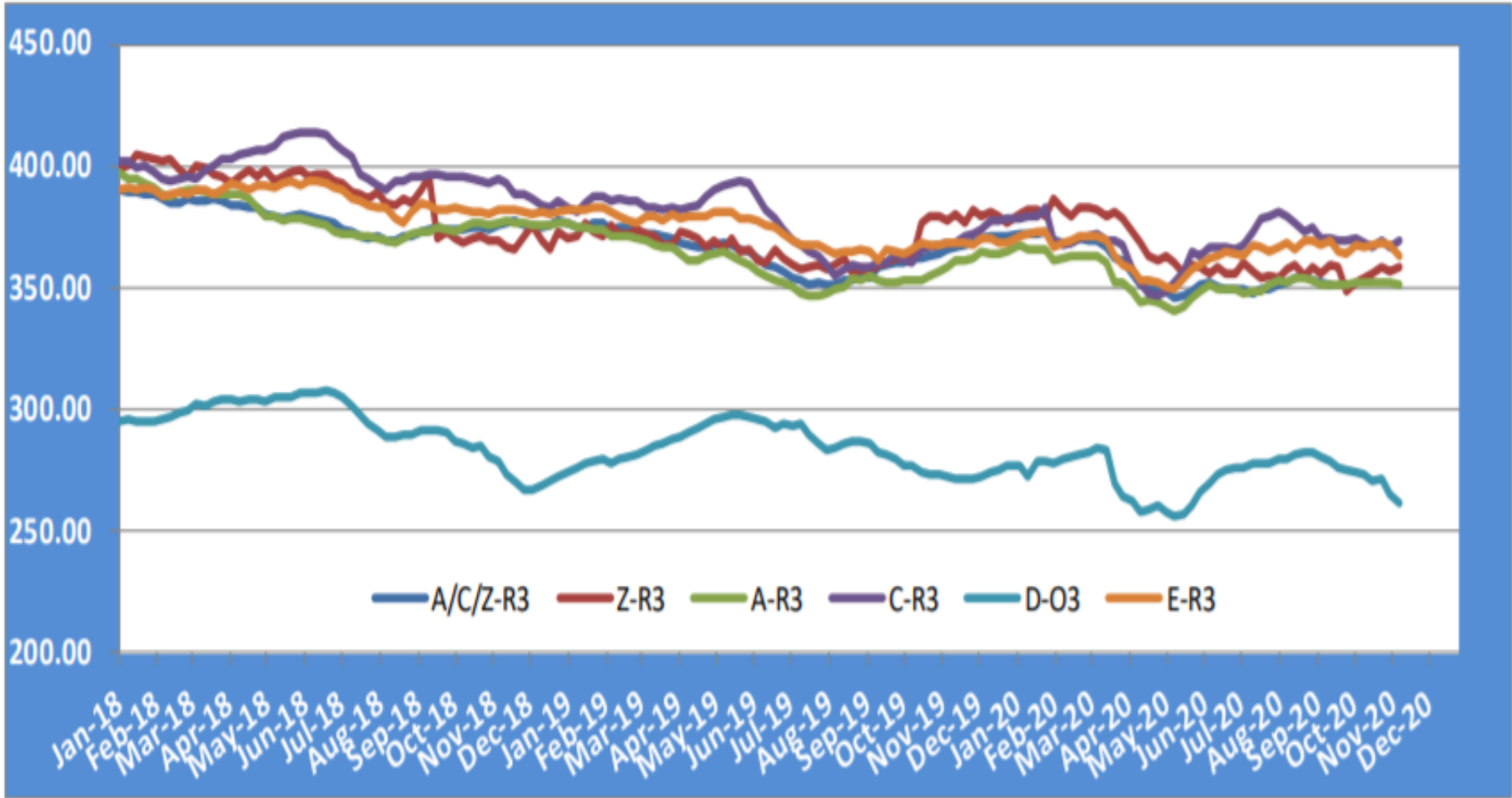


Price in week 45 : **362.67**
% change y/y : **- 1.6%**

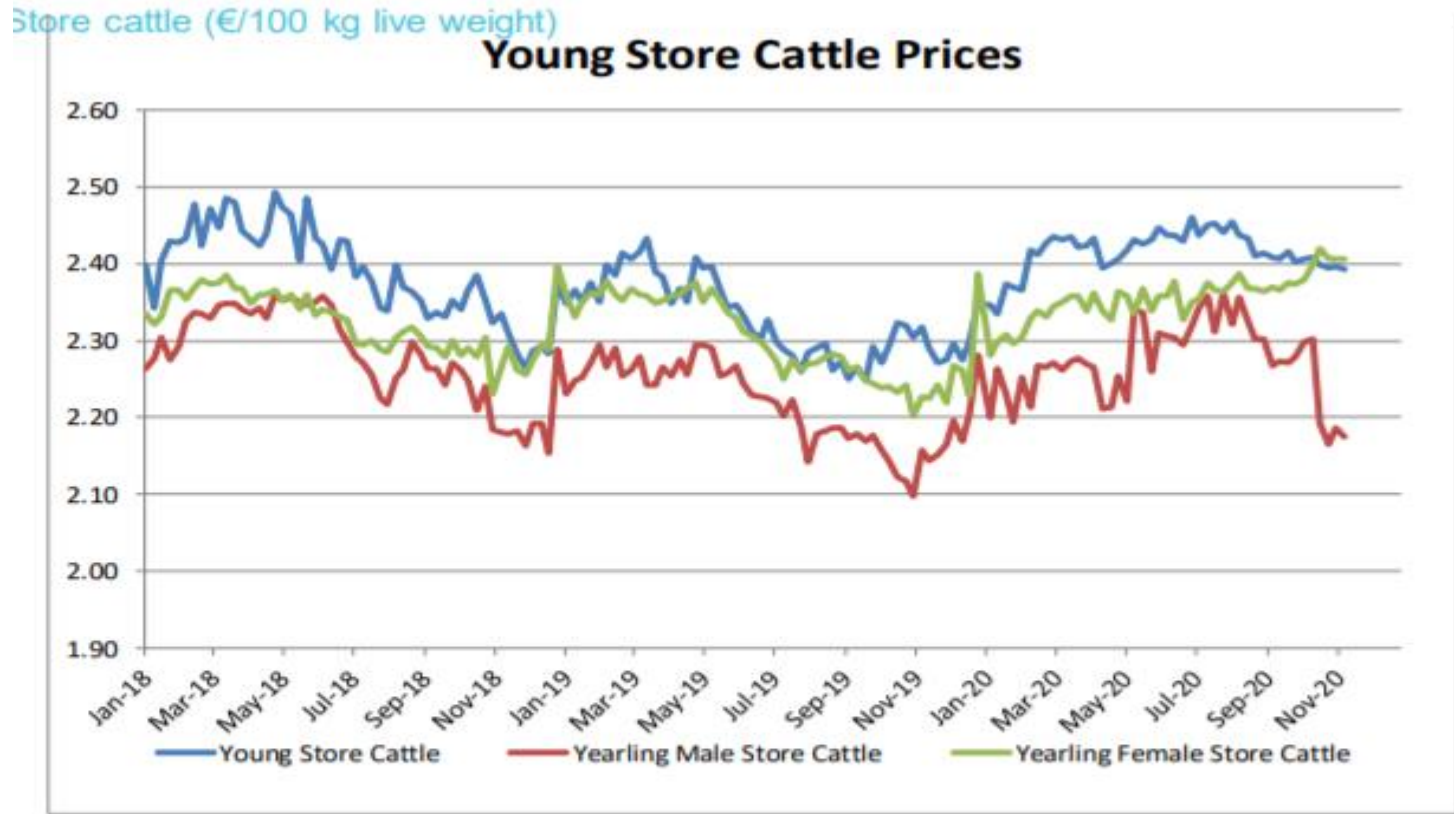
Average price in October 2020 : **366.62**
% change y/y : **- 4.0%**

KARKAS FİYATLARI

AB TÜM KATEGORİLERE GLOBAL BAKIŞ



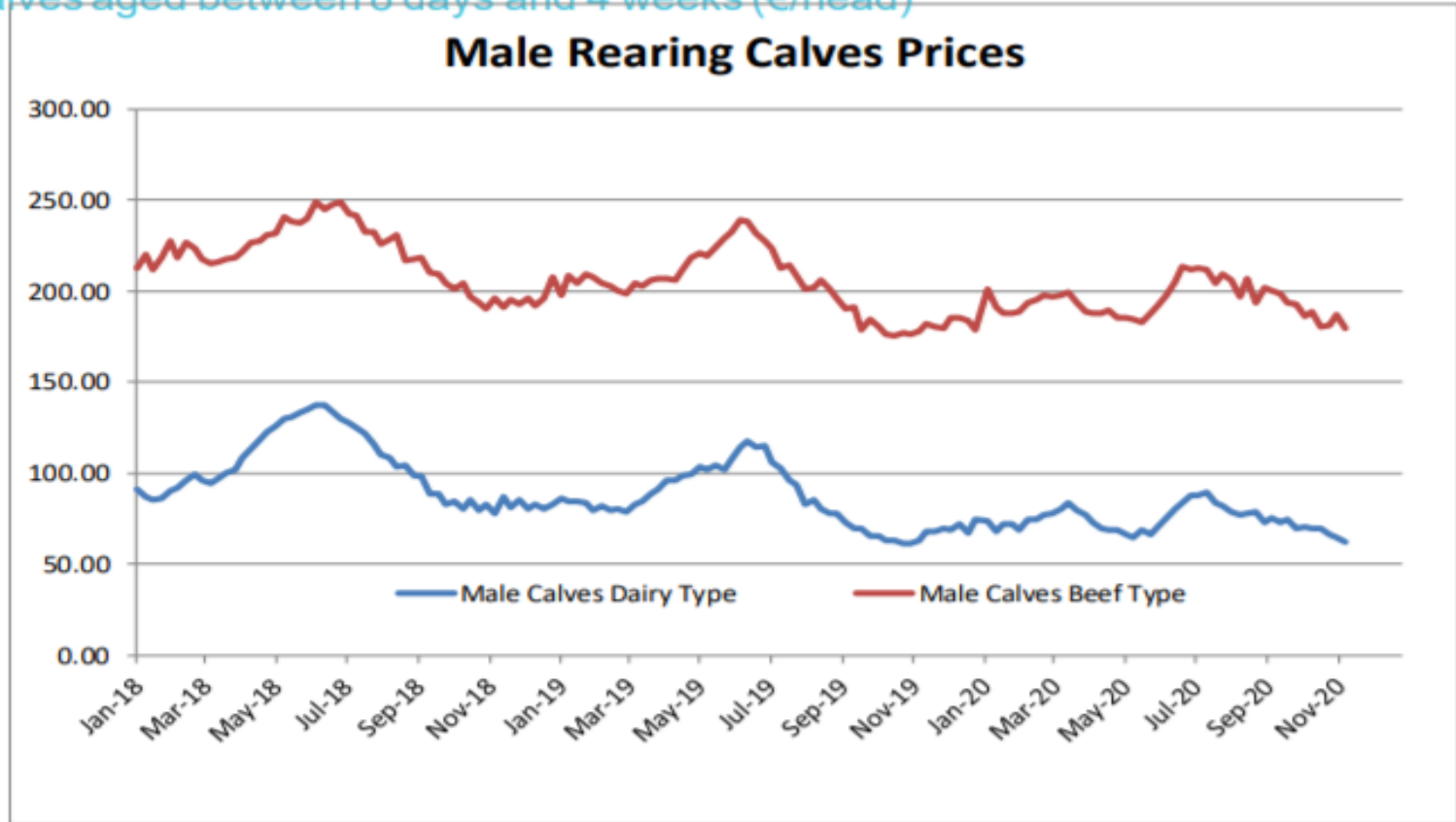
Besilik siğır (€ / 100 kg canlı ağırlık)



Young Store Cattle Price in	Week 45	2.39	Yearling Male Store Cattle Price	2.18
	Change y/y	+0.75%	Change y/y	+0.84%
Yearling Female Store Cattle Price		2.41		
	Change y/y	+4.21%		

8 gün ve 4 haftalık erkek buzağlar (€/baş)

Male calves aged between 8 days and 4 weeks (€/head)



Male Rearing Calves Beef type

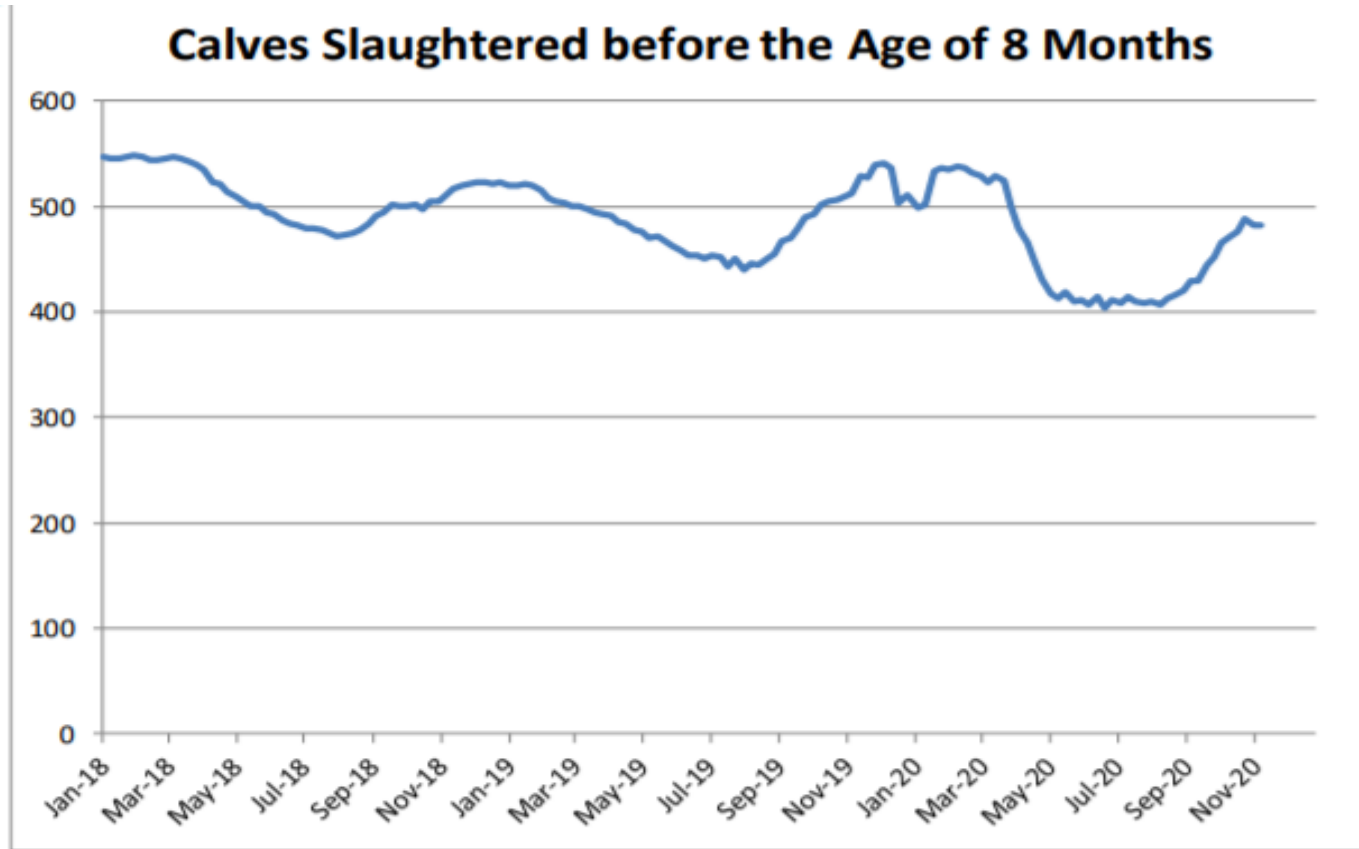
Price in Week 45 179.93
Change y/y -1.02%

Male Rearing Calves Dairy type

Price in Week 45 62.47
Change y/y -6.43%



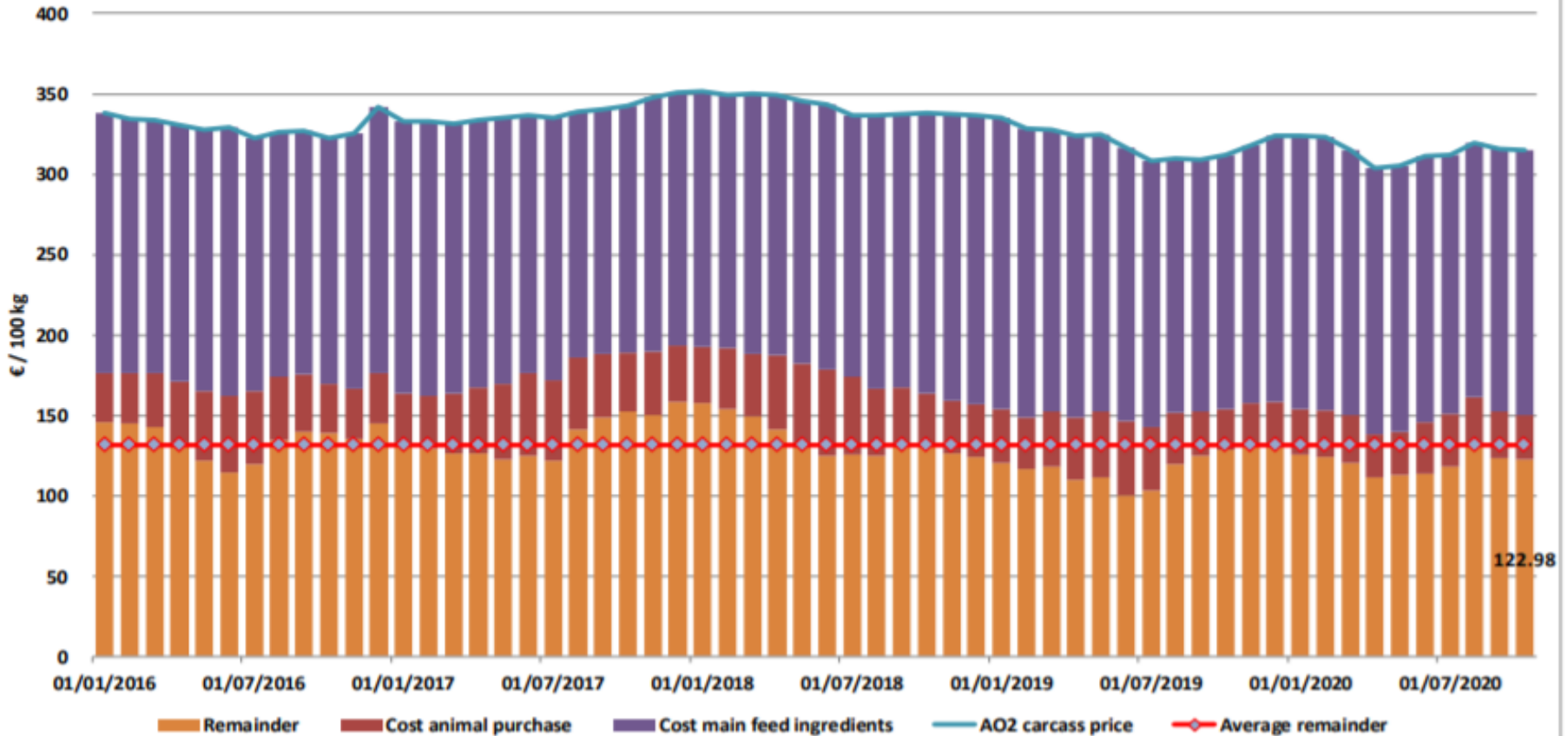
8 aylıktan küçük kesilen buzağular (€ / 100 kg canlı ağırlık)



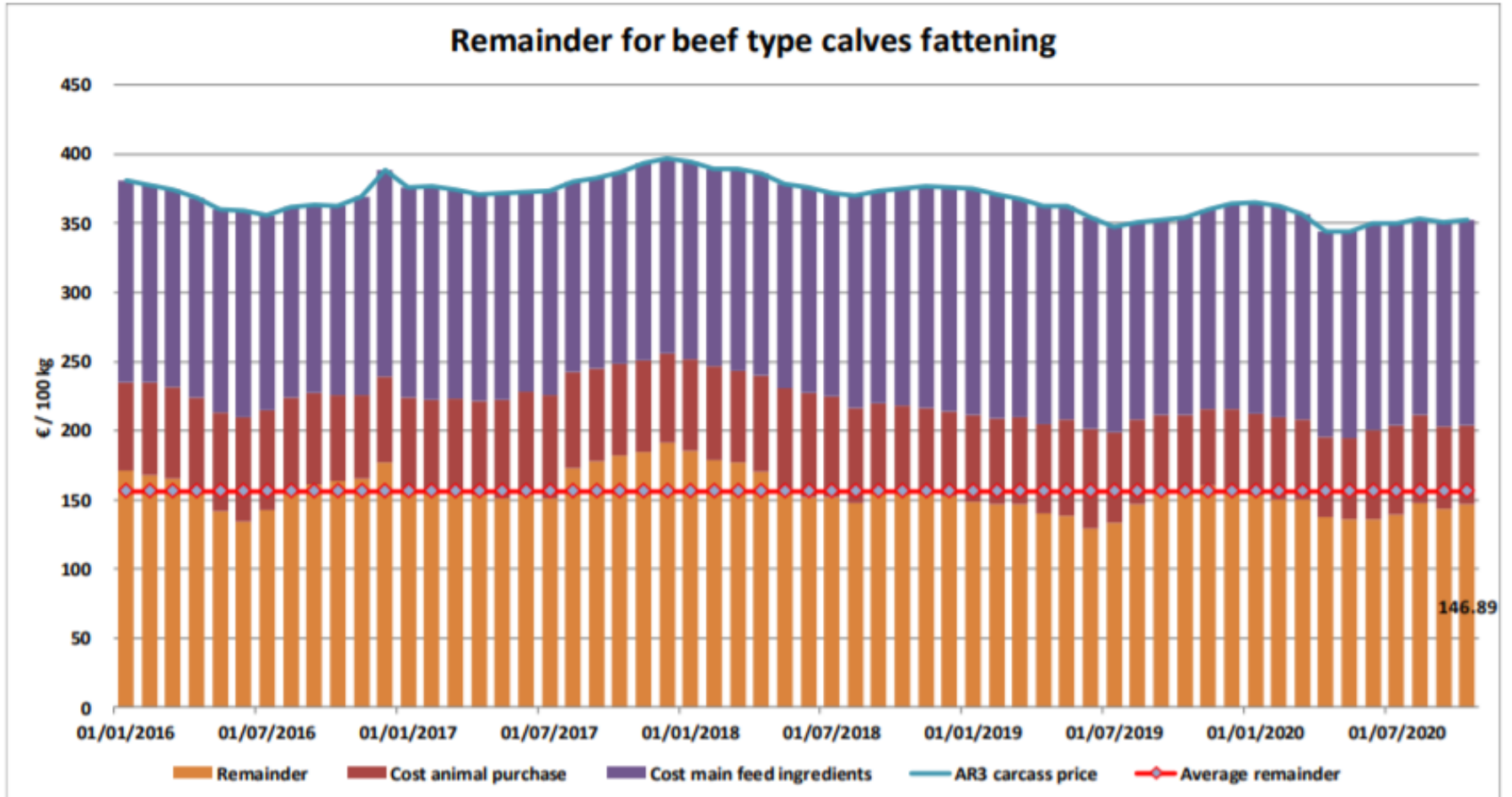
Price in Week 45 482.62 € / 100 kg of carcasse weight
Change y/y -5.96%

Süt Buzağları Besiciliği İçin Kalanlar

Remainder for dairy calves fattening



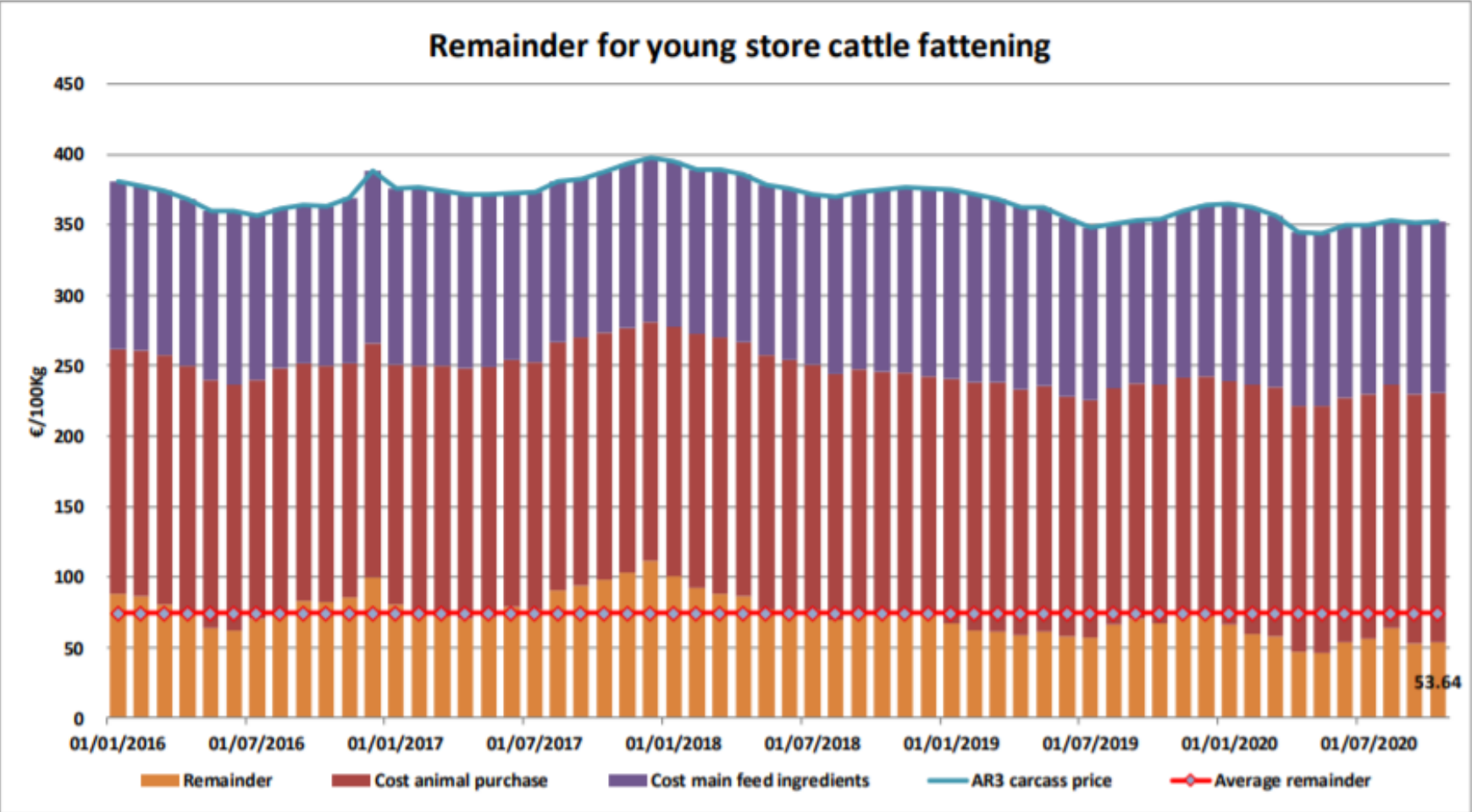
Sığır Tipi Buzağı Besiciliği İçin Kalanlar





Genç Besilik Sığır Besiciliği İçin Kalanlar

Remainder for young store cattle fattening



ÖNGÖRÜ ÖZETİ



	2018	2019	2020	2021
EU PRODUCTION (1000T)	+ 1.61% 7 009	- 1.15% 6 929	- 1.71% 6 875	- 1.76% 6 762
CONSUMPTION (1000T)	+ 1.34% 6 474	- 0.92% 6 502	- 0.80% 6 457	- 0.92% 6 411
BALANCE	535	427	418	351

EU - CARCASS PRICES	2018	2019	2020	2021
ADULT MALE BOVINES (€/100 kg)	+ 0.4% 372.9	- 3.98% 358.1	+ 3.74% 371.5	+ 0.79% 374.4
COWS (€/100 kg)	+ 2.5% 293.4	- 3.98% 282.0	+ 1.08% 285.1	+ 2.20% 291.4

Sources : EStat New Cronos, Member States

AB siğir eti ve canlı hayvan ihracatı (1): Pazar Rakamları (COMEXT – ton ca)

Destinations	2016		2017		2018		2019		Jan-Sep 20		Compared to Jan-Sep 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Israel	41 534	6.2%	44 196	6.1%	47 774	6.8%	49 676	7.1%	40 348	7.8%	- 2.3%
Hong Kong	47 532	7.1%	76 085	10.5%	55 538	7.9%	46 748	6.7%	39 839	7.7%	+ 13.3%
Ghana	37 490	5.6%	37 744	5.2%	36 766	5.2%	39 221	5.6%	35 083	6.8%	+ 21.3%
Philippines	24 116	3.6%	37 103	5.1%	28 766	4.1%	34 158	4.9%	30 742	5.9%	+ 20.3%
Algeria	25 003	3.7%	26 305	3.6%	35 410	5.0%	57 152	8.2%	29 509	5.7%	- 27.5%
Bosnia-Herz.	38 875	5.8%	34 710	4.8%	38 762	5.5%	41 145	5.9%	25 975	5.0%	- 15.5%
Ivory Coast	35 371	5.3%	36 038	5.0%	36 063	5.1%	33 403	4.8%	24 972	4.8%	+ 1.5%
Switzerland	24 872	3.7%	26 707	3.7%	23 762	3.4%	25 188	3.6%	23 120	4.5%	+ 23.7%
Lebanon	47 010	7.0%	38 323	5.3%	42 542	6.1%	36 393	5.2%	21 568	4.2%	- 26.4%
Libya	29 723	4.4%	27 848	3.8%	27 878	4.0%	24 541	3.5%	17 973	3.5%	+ 15.4%
Canada	862	0.1%	2 424	0.3%	2 225	0.3%	6 806	1.0%	16 114	3.1%	+++
Turkey	71 030	10.6%	96 414	13.3%	96 052	13.7%	34 518	4.9%	14 403	2.8%	- 30.9%
China	10 253	1.5%	5 738	0.8%	6 713	1.0%	22 317	3.2%	13 915	2.7%	+ 4.6%
Ukraine	7 875	1.2%	7 331	1.0%	10 466	1.5%	13 835	2.0%	11 525	2.2%	+ 22.6%
Norway	18 312	2.7%	12 849	1.8%	7 925	1.1%	7 667	1.1%	9 472	1.8%	+ 37.1%
Japan	3 254	0.5%	4 281	0.6%	3 453	0.5%	8 038	1.1%	9 323	1.8%	+ 72.2%
Other Destinations	209 917	31.2%	213 426	29.3%	201 789	28.7%	219 601	31.4%	153 887	29.7%	
Total (without UK)	673 028		727 522		701 882		700 409		517 766		
% change			+ 8%		- 4%		- 0%		+ 0.8%		
United Kingdom	477 394		493 227		486 480		439 929		297 054 up to Aug 20		#/NA

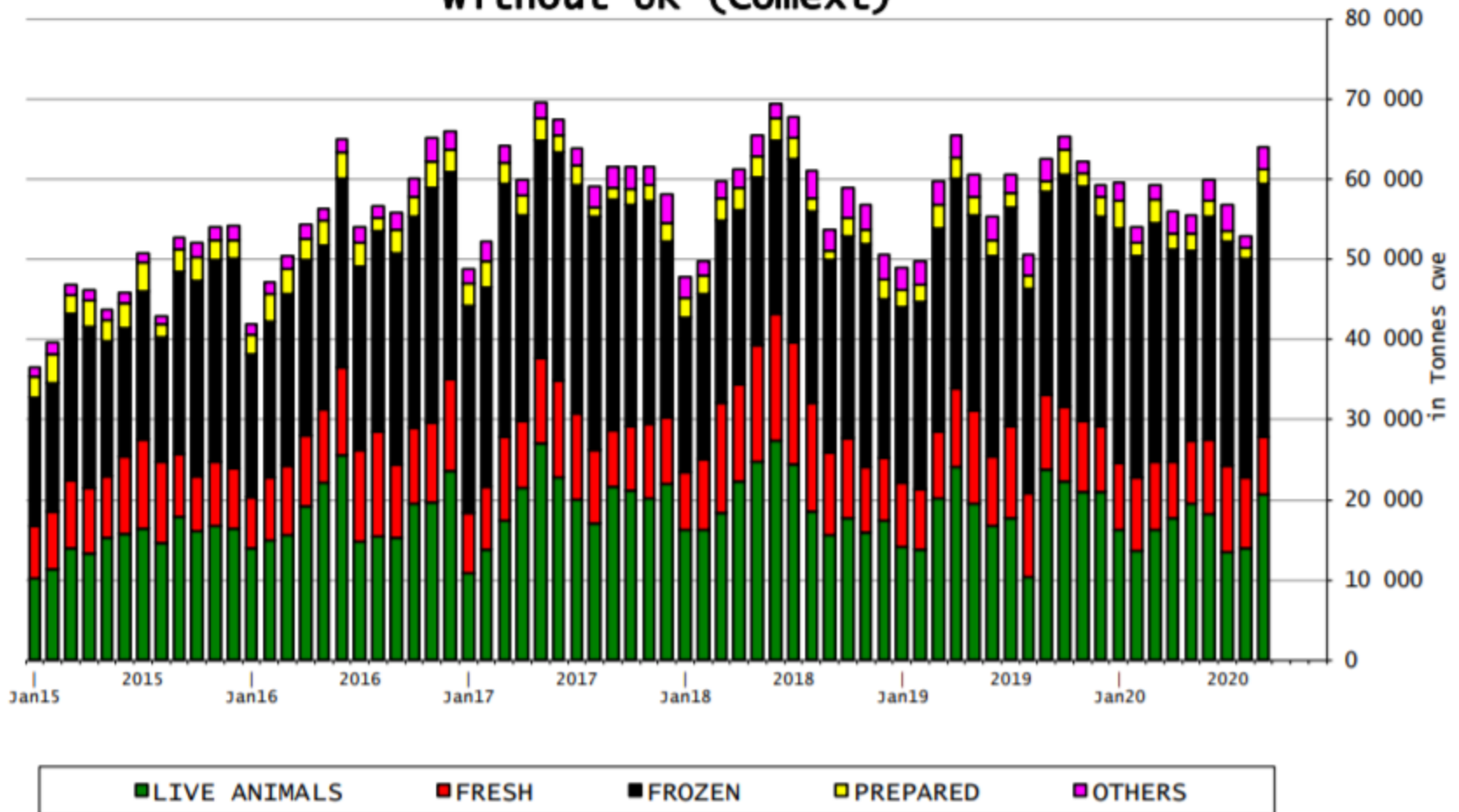


AB sığır eti ihracatı: Pazar Rakamları (COMEXT – ton ca)

Destinations	2016		2017		2018		2019		Jan-Sep 20		Compared to Jan-Sep 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	47 532	10.5%	76 085	15.5%	55 538	11.9%	46 748	9.8%	39 839	10.8%	+ 13.3%
Ghana	37 490	8.3%	37 744	7.7%	36 766	7.9%	39 221	8.2%	35 083	9.5%	+ 21.3%
Philippines	24 116	5.3%	37 103	7.5%	28 766	6.2%	34 158	7.2%	30 742	8.4%	+ 20.3%
Ivory Coast	35 371	7.8%	36 028	7.3%	36 063	7.7%	33 403	7.0%	24 972	6.8%	+ 1.5%
Bosnia-Herz.	36 790	8.1%	32 180	6.5%	36 151	7.7%	38 832	8.2%	24 407	6.6%	- 16.1%
Switzerland	23 704	5.2%	25 569	5.2%	22 712	4.9%	24 110	5.1%	22 263	6.0%	+ 24.4%
Israel	15 055	3.3%	18 749	3.8%	22 163	4.7%	23 073	4.9%	16 625	4.5%	- 15.3%
Canada	862	0.2%	2 424	0.5%	2 225	0.5%	6 806	1.4%	16 114	4.4%	+++
China	10 253	2.3%	5 738	1.2%	6 713	1.4%	22 317	4.7%	13 915	3.8%	+ 4.6%
Ukraine	7 094	1.6%	6 926	1.4%	9 887	2.1%	12 893	2.7%	10 639	2.9%	+ 19.6%
Norway	18 307	4.0%	12 848	2.6%	7 922	1.7%	7 667	1.6%	9 472	2.6%	+ 37.1%
Japan	3 254	0.7%	4 281	0.9%	3 453	0.7%	8 038	1.7%	9 323	2.5%	+ 72.2%
USA	3 137	0.7%	3 756	0.8%	5 458	1.2%	7 867	1.7%	8 859	2.4%	+ 55.2%
North Macedonia	11 413	2.5%	11 285	2.3%	10 002	2.1%	11 395	2.4%	7 641	2.1%	- 8.7%
Algeria	10 726	2.4%	12 304	2.5%	13 919	3.0%	19 142	4.0%	7 108	1.9%	- 46.3%
Chile	2 228	0.5%	8 961	1.8%	16 410	3.5%	12 461	2.6%	6 765	1.8%	- 42.4%
Other Destinations	165 886	36.6%	160 398	32.6%	152 677	32.7%	127 388	26.8%	84 394	22.9%	
Total (without UK)	453 217		492 379		466 824		475 519		368 160		
% change			+ 9%		- 5%		+ 2%		+ 4.3%		
United Kingdom	468 017	50.8%	482 057	49.5%	475 987	50.5%	429 552	47.5%	289 158 up to Aug 20		#N/A

AB siğir eti ürünleri ihracatı (COMEXT)

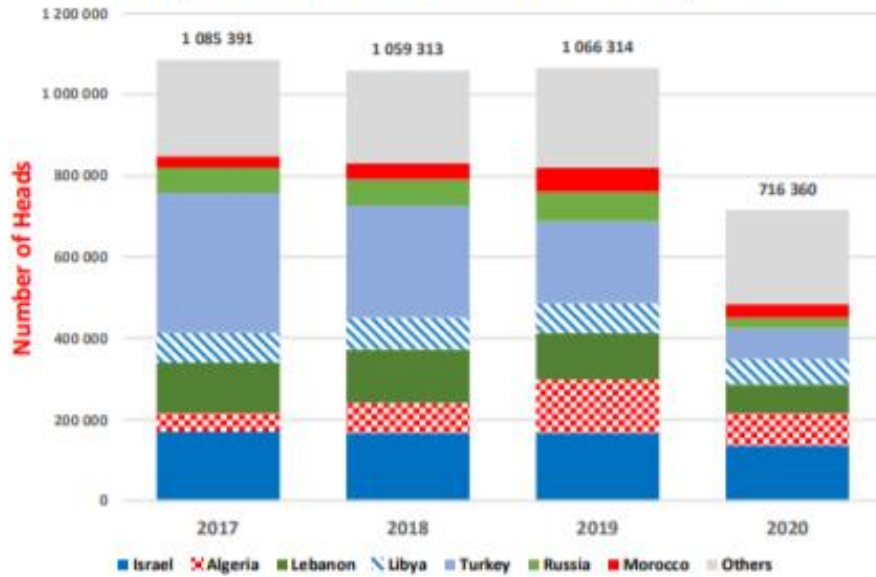
EU Exports of BEEF products without UK (Comext)



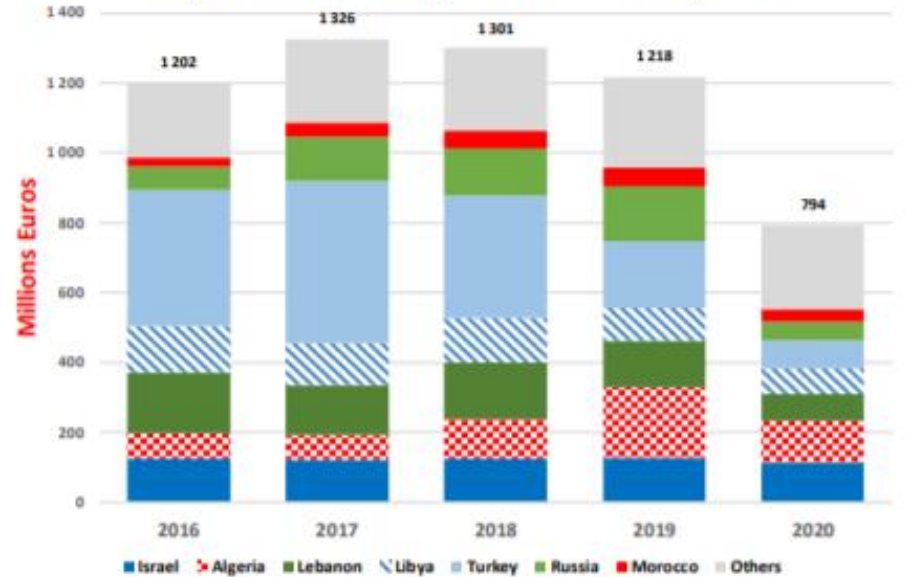


European
Commission

EU Exports of BEEF Live Animals by Partner for the Period Jan-Sep 2020



EU Exports of BEEF Live Animals by Partner for the Period Jan-Sep 2020





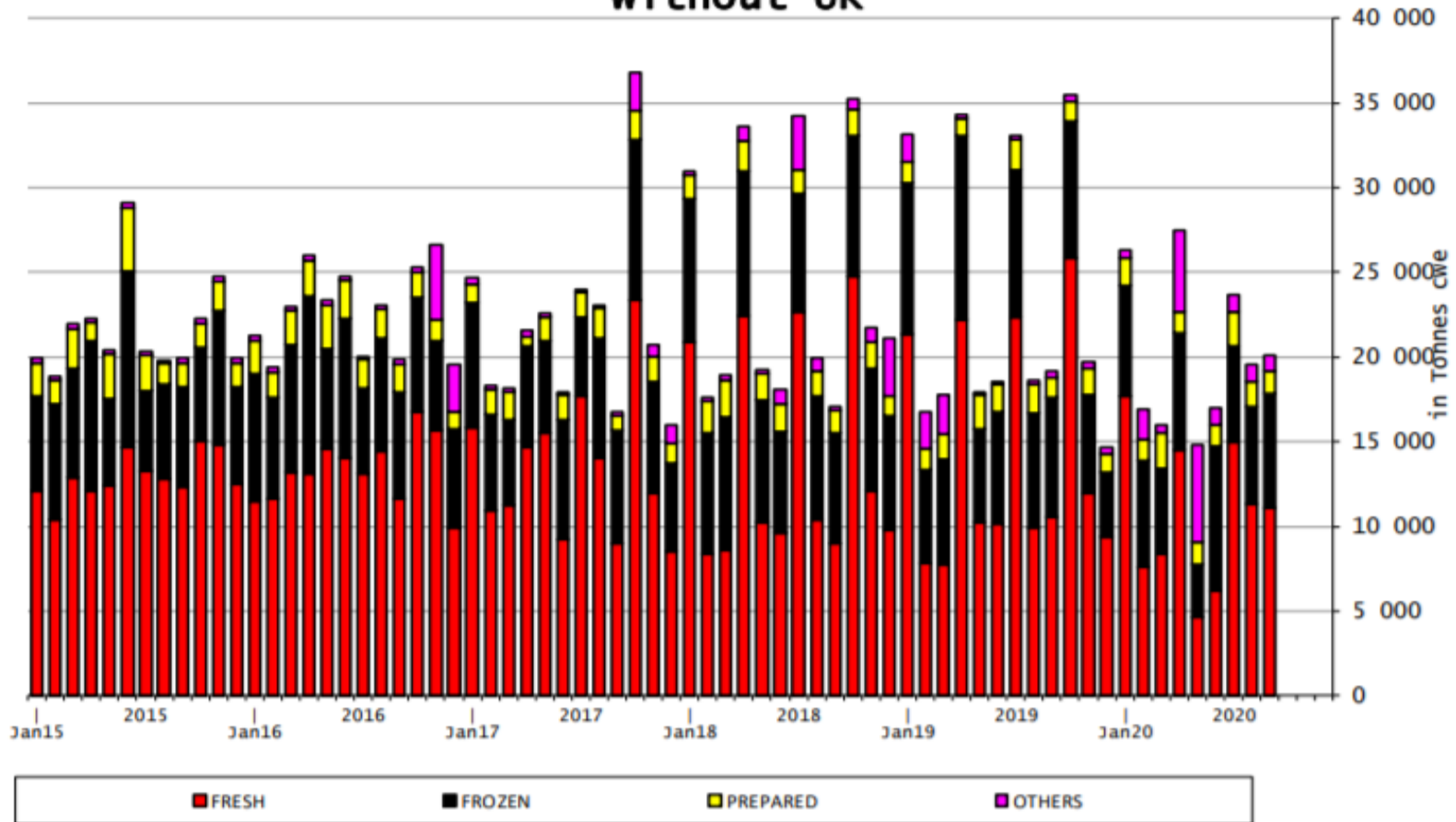
AB Sığır Eti ve Canlı Hayvan İthalatları (1): Ticaret Verileri (COMEXT – ton ca)

Origins	2016		2017		2018		2019		Jan-Sep 20		Compared to Jan-Sep 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	100 982	37.1%	87 156	33.5%	103 979	36.1%	99 568	35.7%	63 907	35.1%	- 16.4%
Argentina	43 111	15.8%	49 260	18.9%	69 011	24.0%	70 617	25.3%	55 644	30.6%	+ 6.8%
Uruguay	52 896	19.4%	55 212	21.2%	48 712	16.9%	40 483	14.5%	25 770	14.2%	- 17.9%
USA	20 290	7.5%	21 624	8.3%	19 268	6.7%	16 852	6.0%	12 482	6.9%	- 0.5%
Australia	21 909	8.1%	18 193	7.0%	17 368	6.0%	16 516	5.9%	8 907	4.9%	- 27.2%
New Zealand	8 274	3.0%	6 806	2.6%	7 164	2.5%	6 726	2.4%	4 445	2.4%	- 14.3%
Paraguay	5 309	2.0%	5 922	2.3%	5 520	1.9%	5 204	1.9%	3 110	1.7%	- 17.8%
Switzerland	5 496	2.0%	5 138	2.0%	5 437	1.9%	4 432	1.6%	2 962	1.6%	- 4.7%
Namibia	6 281	2.3%	5 043	1.9%	3 442	1.2%	7 734	2.8%	1 183	0.7%	- 77.9%
Canada	392	0.1%	512	0.2%	1 343	0.5%	2 518	0.9%	740	0.4%	- 55.4%
Serbia	557	0.2%	565	0.2%	1 134	0.4%	1 062	0.4%	734	0.4%	- 4.4%
Botswana	4 204	1.5%	2 686	1.0%	3 119	1.1%	4 950	1.8%	686	0.4%	- 78.0%
Japan	518	0.2%	646	0.2%	791	0.3%	998	0.4%	506	0.3%	- 22.6%
Norway	276	0.1%	388	0.1%	153	0.1%	128	0.0%	217	0.1%	+++
Ukraine	317	0.1%	374	0.1%	257	0.1%	410	0.1%	134	0.1%	- 56.1%
Chile	575	0.2%	319	0.1%	356	0.1%	392	0.1%	124	0.1%	- 59.9%
Other Destinations	705	0.3%	651	0.2%	735	0.3%	645	0.2%	328	0.2%	
Total (without UK)	272 093		260 496		287 788		279 235		181 880		
% change			- 4%		+ 10%		- 3%		- 13.2%		
United Kingdom	134 098		133 588		138 496		160 322		89 161 up to Aug 20		#N/A

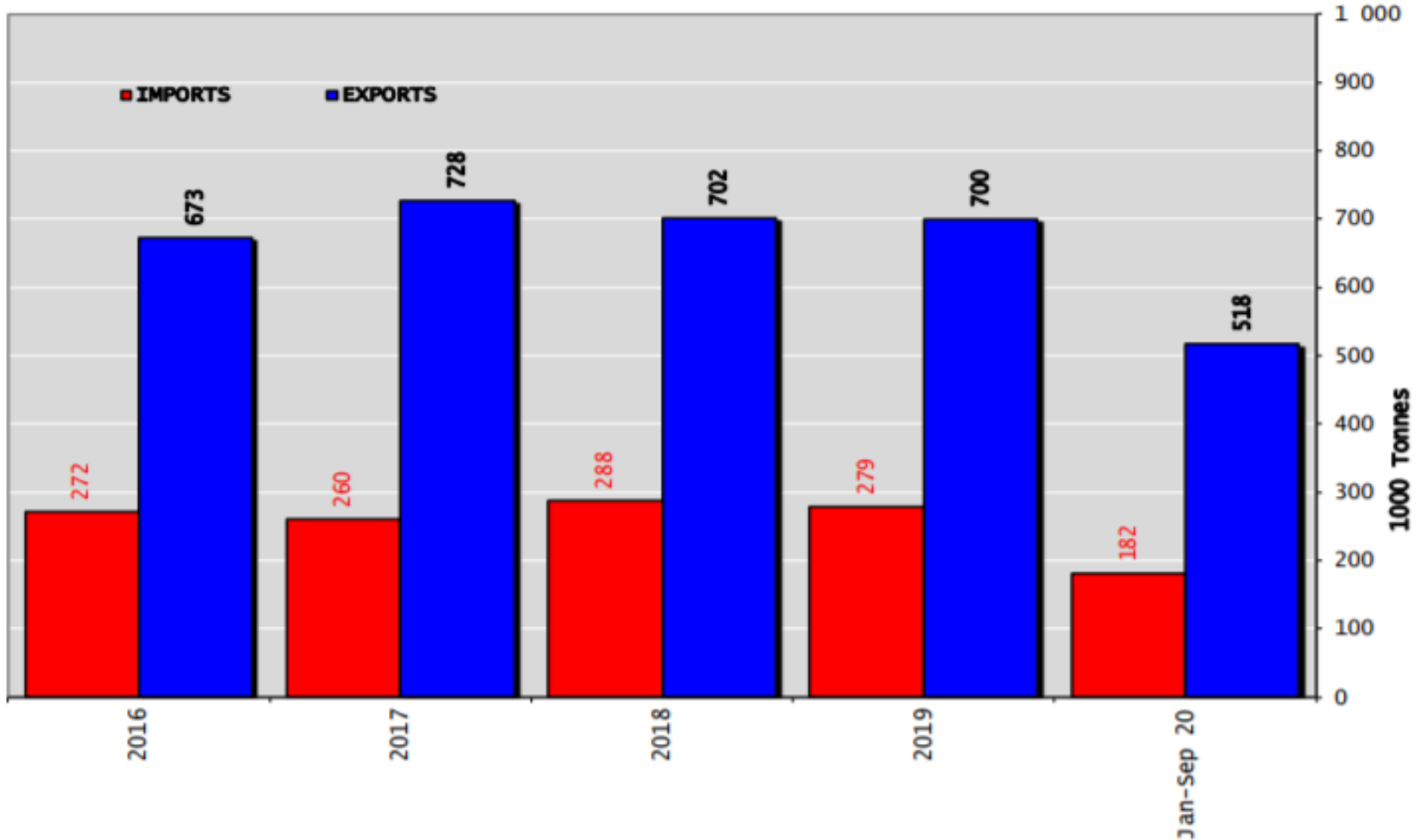


AB Sığır Eti İthalatları (Birleşik Krallık hariç)

EU Imports of BEEF products without UK



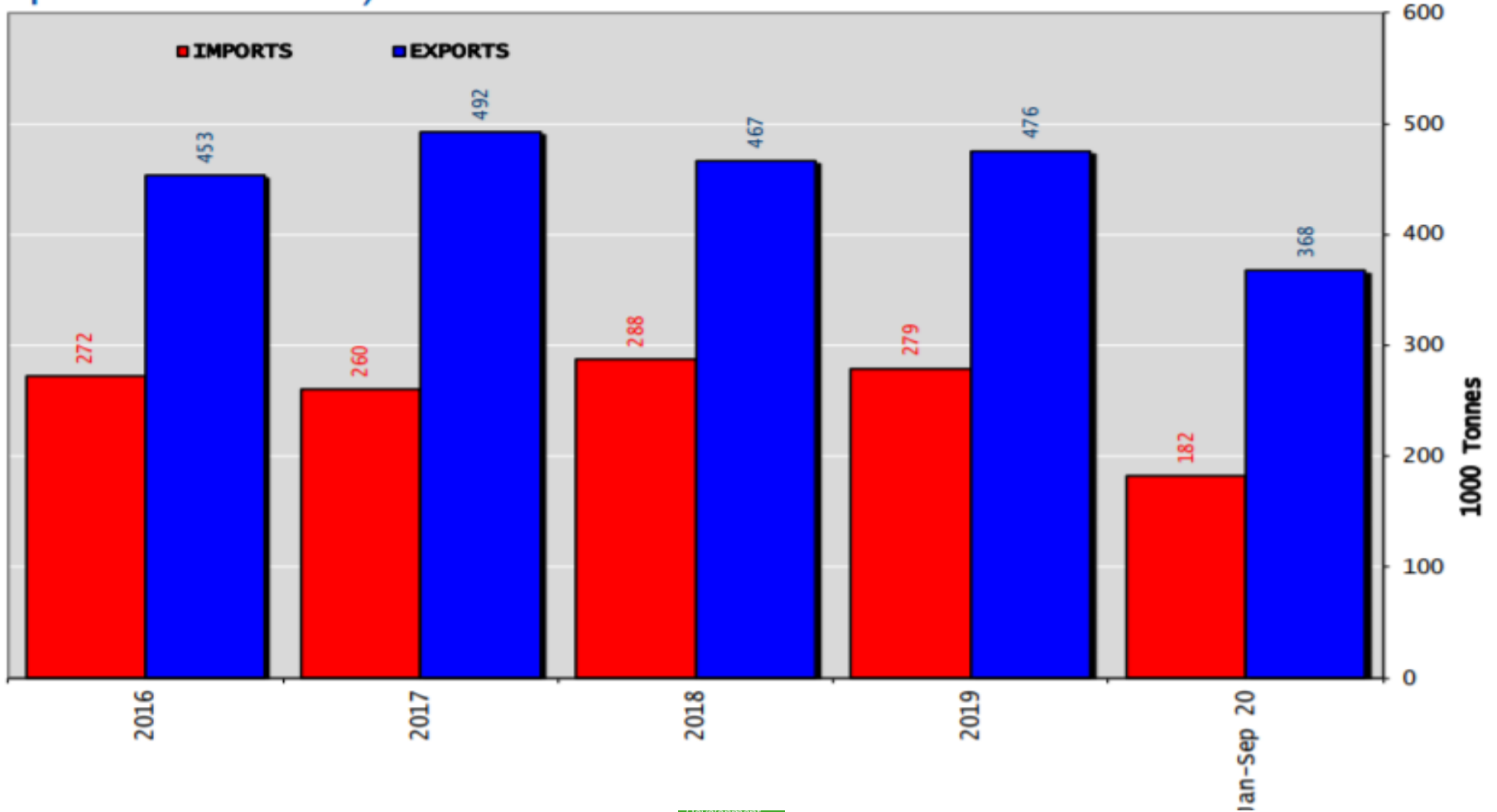
Sığır Eti Ürünleri ve Canlı Hayvan Ticaret Dengesi (Ton) (Birleşik Krallık Hariç)



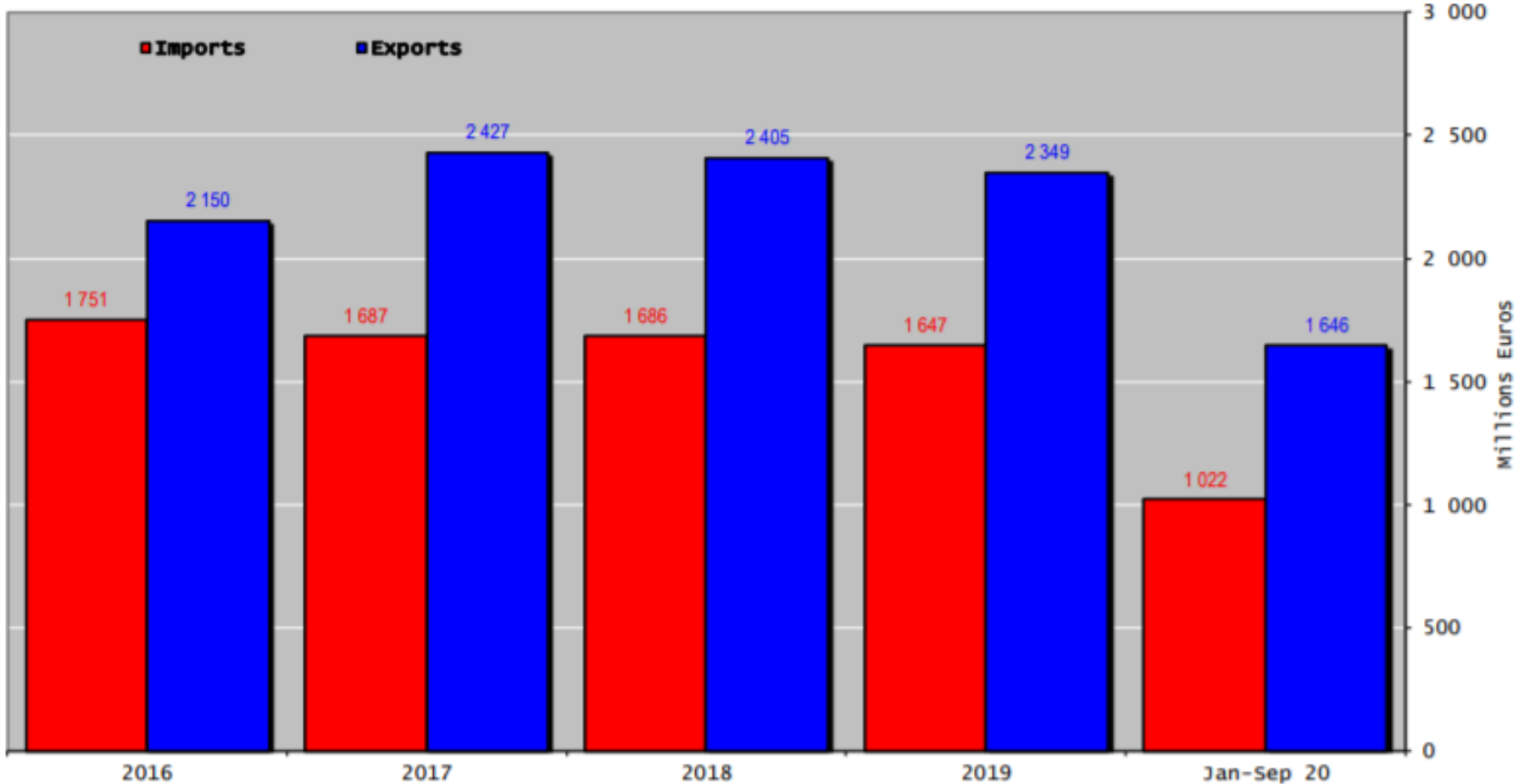


Sığır Eti Ürünleri Ticaret Dengesi (Canlı hayvanlar hariç) (Ton)

(Birleşik Krallık Hariç)

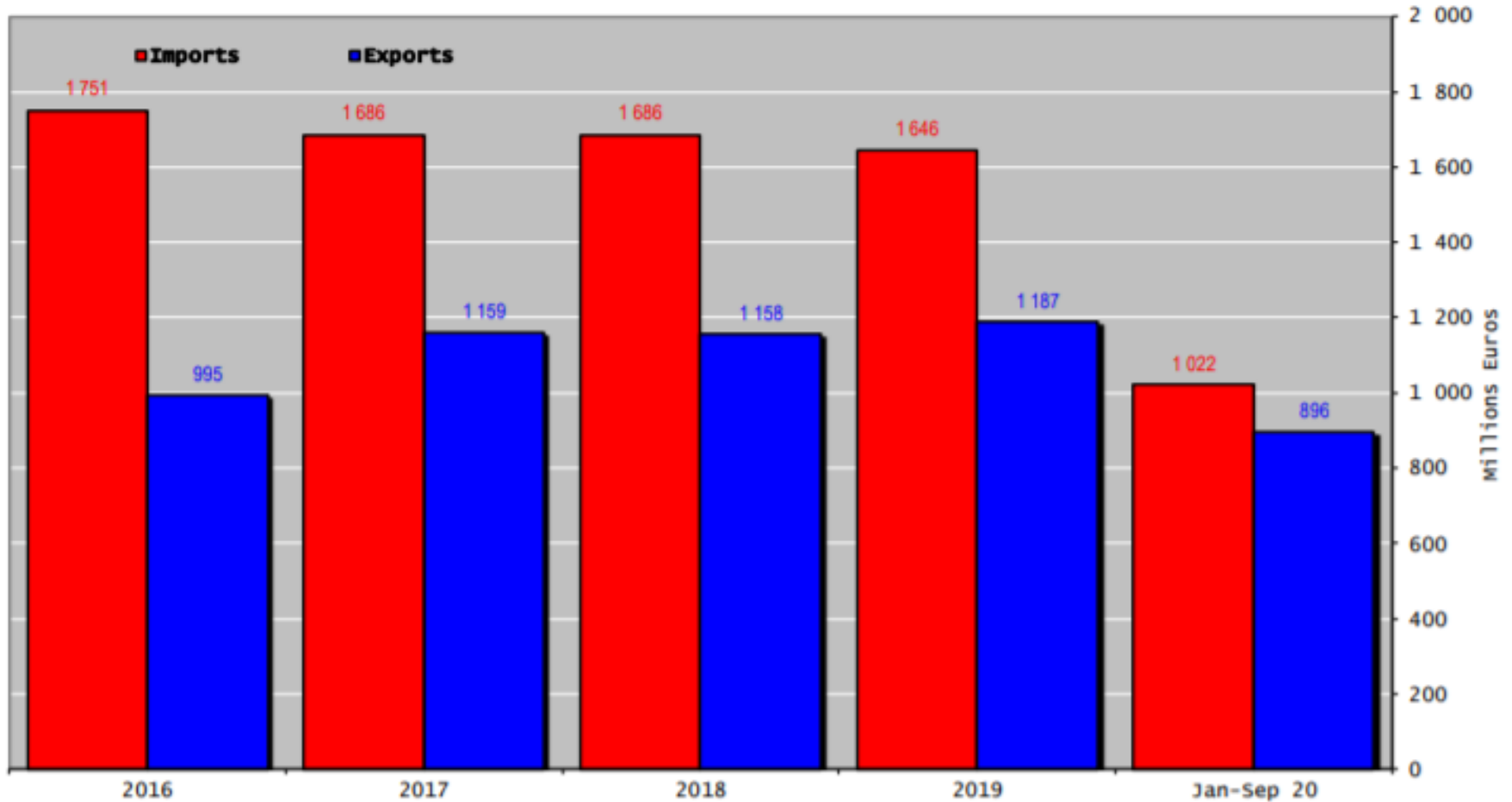


Sığır Eti Ürünleri ve Canlı Hayvan Ticaret Dengesi (Milyon Euro) (Birleşik Krallık Hariç)

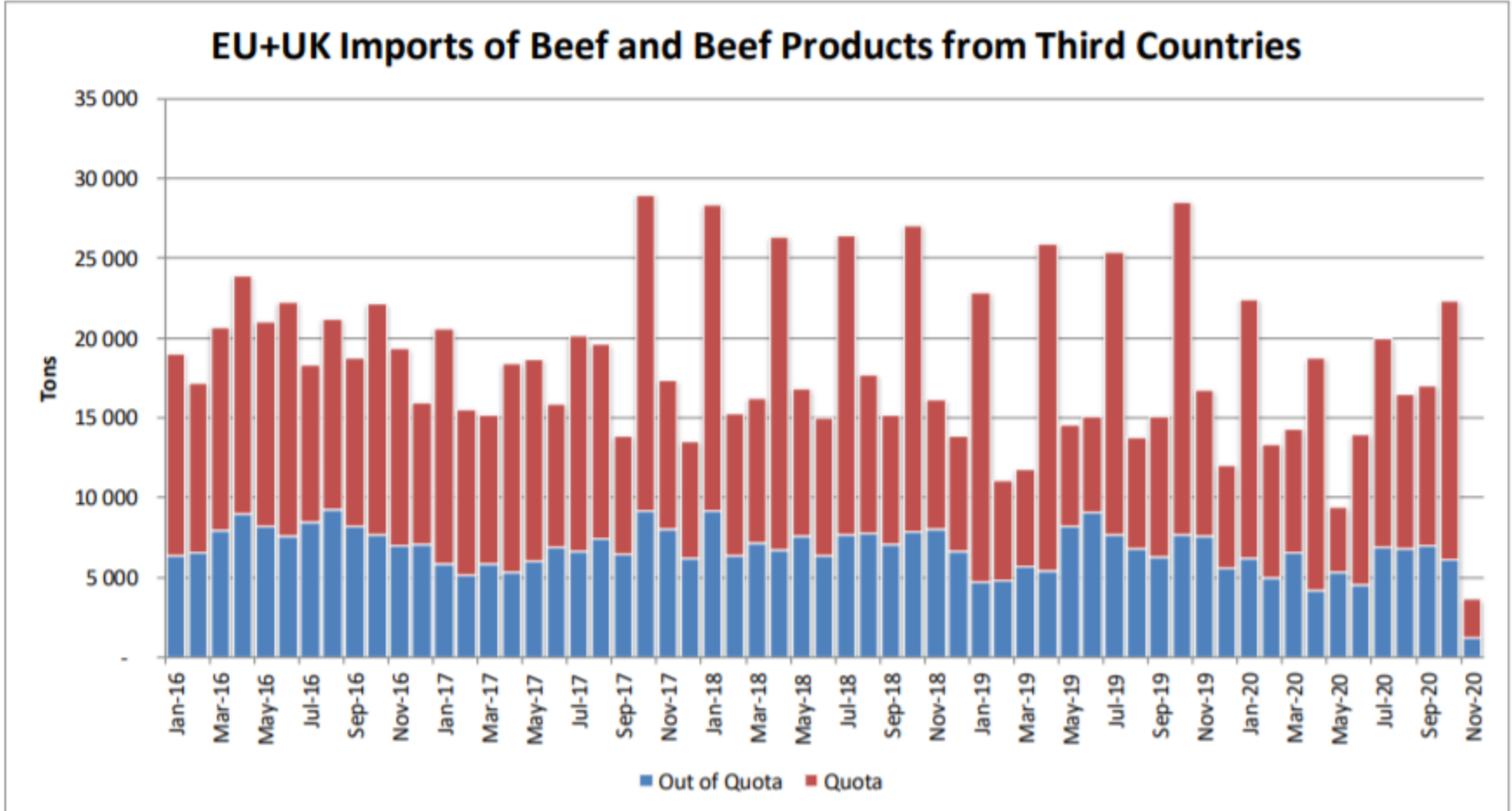




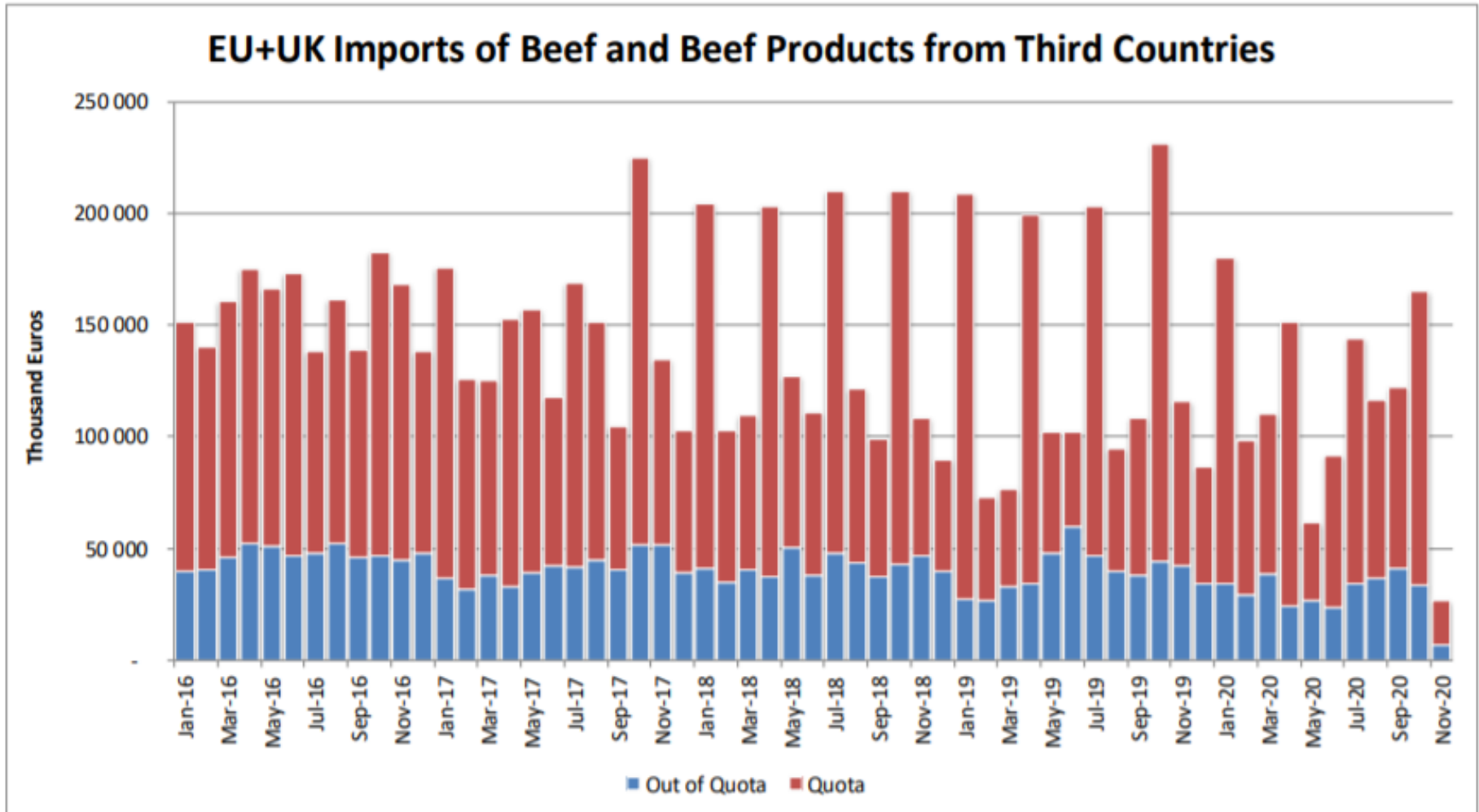
AB Sığır Eti Ürünleri Ticareti (Canlı Hayvanlar Hariç) (Milyon Euro) (Birleşik Krallık Hariç)



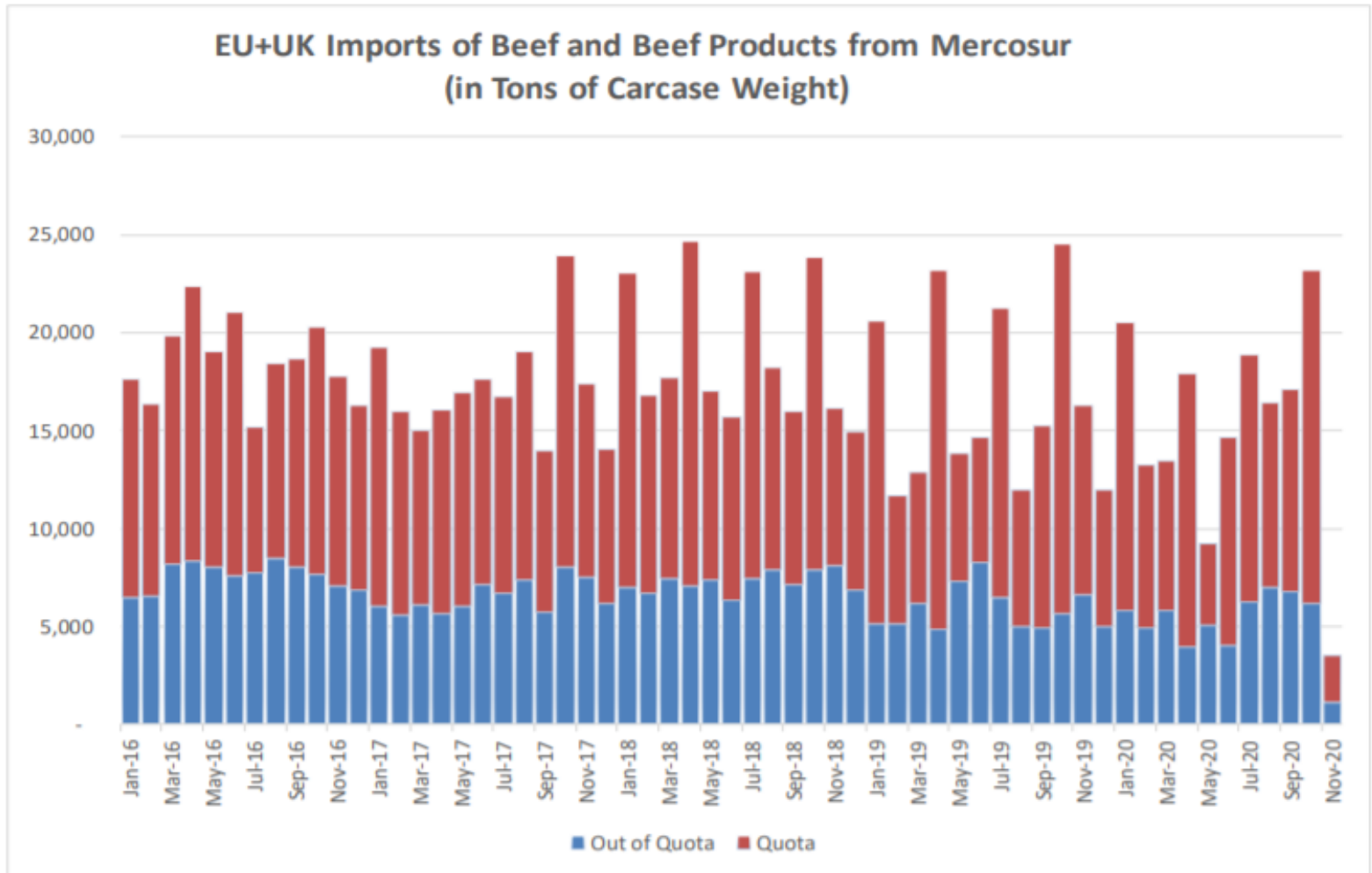
Üçüncü Ülkelerden AB ve Birleşik Krallık Sığır ve Sığır eti Ürünleri İthalatları (Ton)



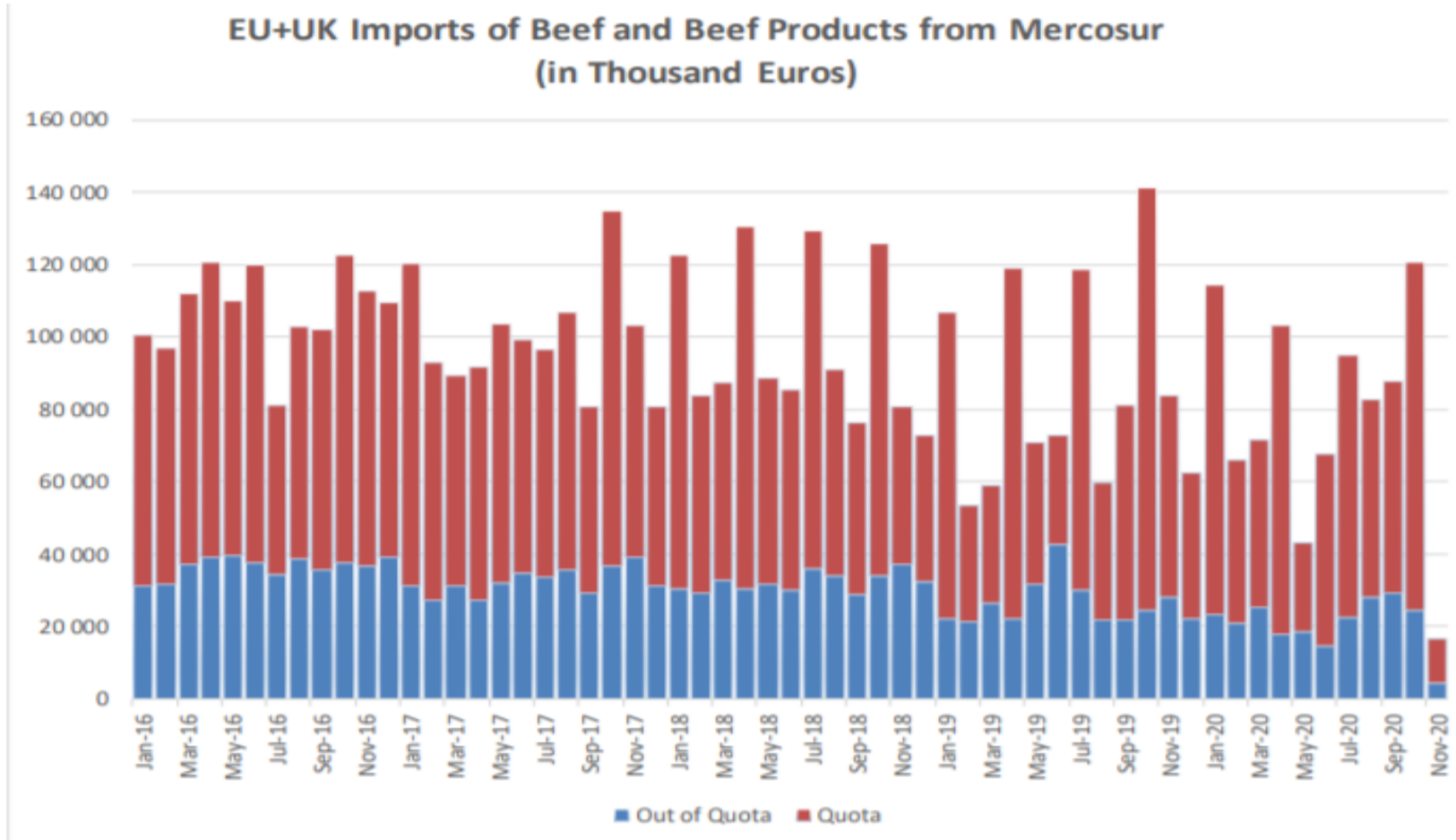
Üçüncü Ülkelerden AB ve Birleşik Krallık Sığır ve Sığır eti Ürünleri İthalatları (Bin Euro)



Mercosur Ülkelerinden Sığır ve Sığır Eti Ürünleri AB ve Birleşik Krallık İthalatları (Ton, Karkas Ağırlık)



Mercosur Ülkelerinden Sığır ve Sığır Eti Ürünleri AB ve Birleşik Krallık İthalatları (Bin Euro)



YÜKSEK KALİTE SIĞIR ETİ İTHALAT KOTALARI



European
Commission

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	200	11.05	5.53%	8.34	4.17%	-	0.00%
09.4450 Argentina	29 500	29 491.35	99.97%	26 649.20	90.34%	8 446.92	28.63%
09.4451 Australia	7 150	4 942.02	69.12%	3 000.01	41.96%	495.01	6.92%
09.4452 Uruguay	6 376	6 363.76	99.81%	4 520.57	70.90%	2 166.90	33.99%
09.4453 Brazil	10 000	4 147.19	41.47%	2 884.79	28.85%	979.18	9.79%
09.4454 New Zealand	1 300	980.60	75.43%	859.15	66.09%	304.97	23.46%
09.4002 Canada/US	11 500	3 883.04	33.77%	2 703.68	23.51%	570.35	4.96%
09.4455 Paraguay	1 000	935.41	93.54%	680.40	68.04%	246.08	24.61%
Total Beef	66 826	50 743.37	75.93%	41 297.80	61.80%	13 209.41	19.77%
Total Buffalo	2 450	11.05	0.45%	8.34	0.34%	-	0.00%
Total	69 276	50 754.42	73.26%	41 306.14	59.63%	13 209.41	19.07%

* up to 30/09/2020

YÜKSEK KALİTE SİĞİR ETİ İTHALAT KOTALARI



Quota erga omnes

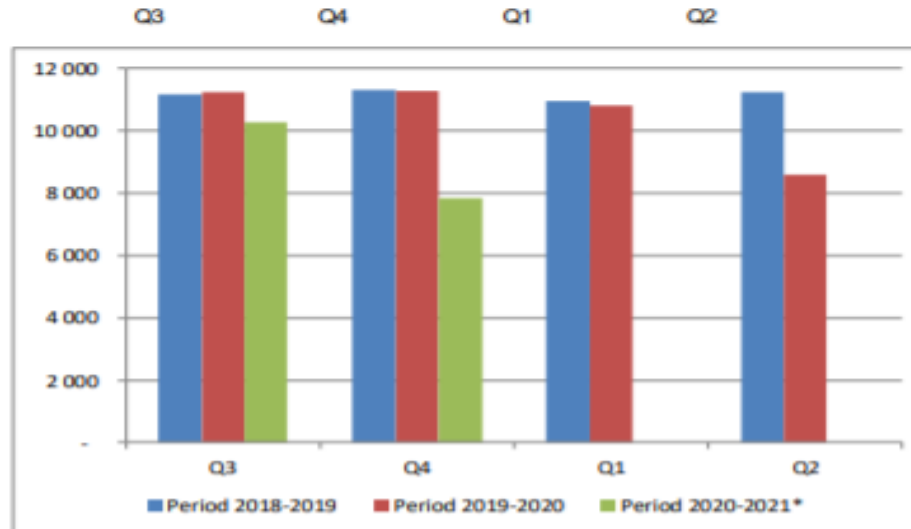
Regulation (EU) No 481/2012

	2018-Q3	2018-Q4	2019-Q1	2019-Q2	TOTAL
Period 2018-2019	11 165	11 319	10 973	11 256	44 712
Available	11 250	11 250	11 250	11 250	45 000
Use	99.24%	100.61%	97.53%	100.05%	99.36%
Available after transfer	11 250	11 335	11 181	11 527	
	99.24%	100.00%	97.53%	100.00%	

	2019-Q3	2019-Q4	2020-Q1	2020-Q2	TOTAL
Period 2019-2020	11 246	11 261	10 825	8 581	41 914
Available	11 250	11 250	11 250	11 250	45 000
Use	99.97%	100.10%	96.22%	76.28%	93.14%
Available after transfer	11 250	11 254	11 239	11 675	
	99.97%	100.00%	96.22%	76.28%	

	2020-Q3*	2020-Q4	2021-Q1	2021-Q2	TOTAL
Period 2020-2021*	10 266	7 848			18 114
Available	11 250	11 250			45 000
Use	91.25%	69.76%			40.25%
Available after transfer	11 250	12 234			
	91.25%	64.15%			

* Until 13.11.2020



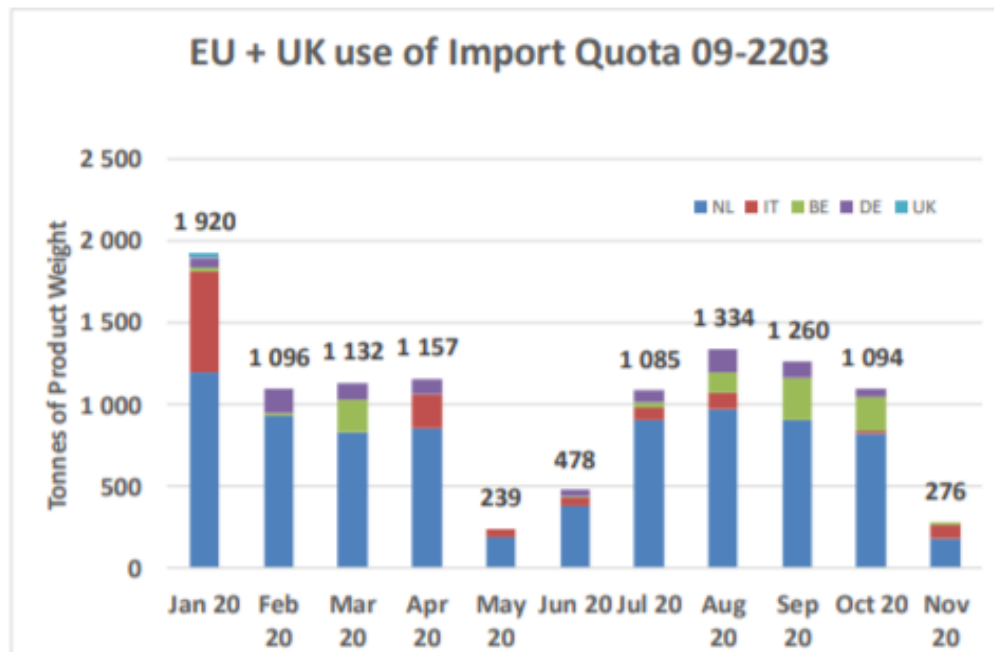
YÜKSEK KALİTE SİĞİR ETİ İTHALAT KOTALARI



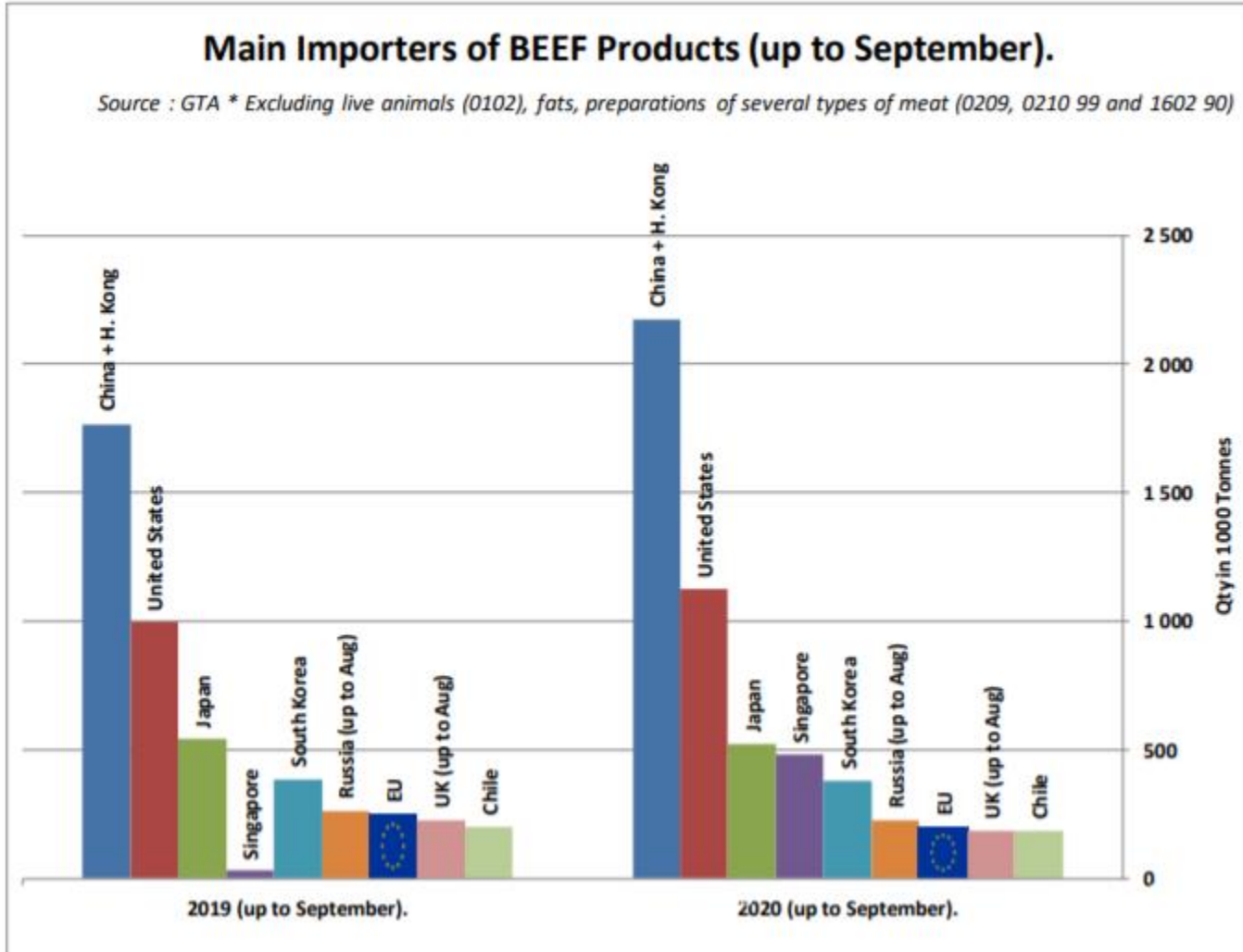
European Commission

Origin	GATT 2019-2020				Total
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	
NL			2 957	1 415	4 372
IT			614	314	929
BE			241	10	251
DE			313	133	446
UK			23	-	23
Total import within Quota			4 125	1 873	5 998
Available			4 625	4 625	9 250
Use			89.19%	40.50%	64.84%
After transfer			4 625	5 125	
Use			89.19%	36.55%	

Origin	GATT 2020-2021				Total
	2020-Q3	2020-Q4	2021-Q1	2021-Q2	
NL	2 785	1 007			3 791
IT	174	96			270
BE	417	223			639
DE	305	44			349
Total import within Quota	3 680	1 370			5 050
Available	4 625	4 625			9 250
Use	79.57%	29.61%			
After transfer	4 625	5 570			
Use	79.57%	24.59%			



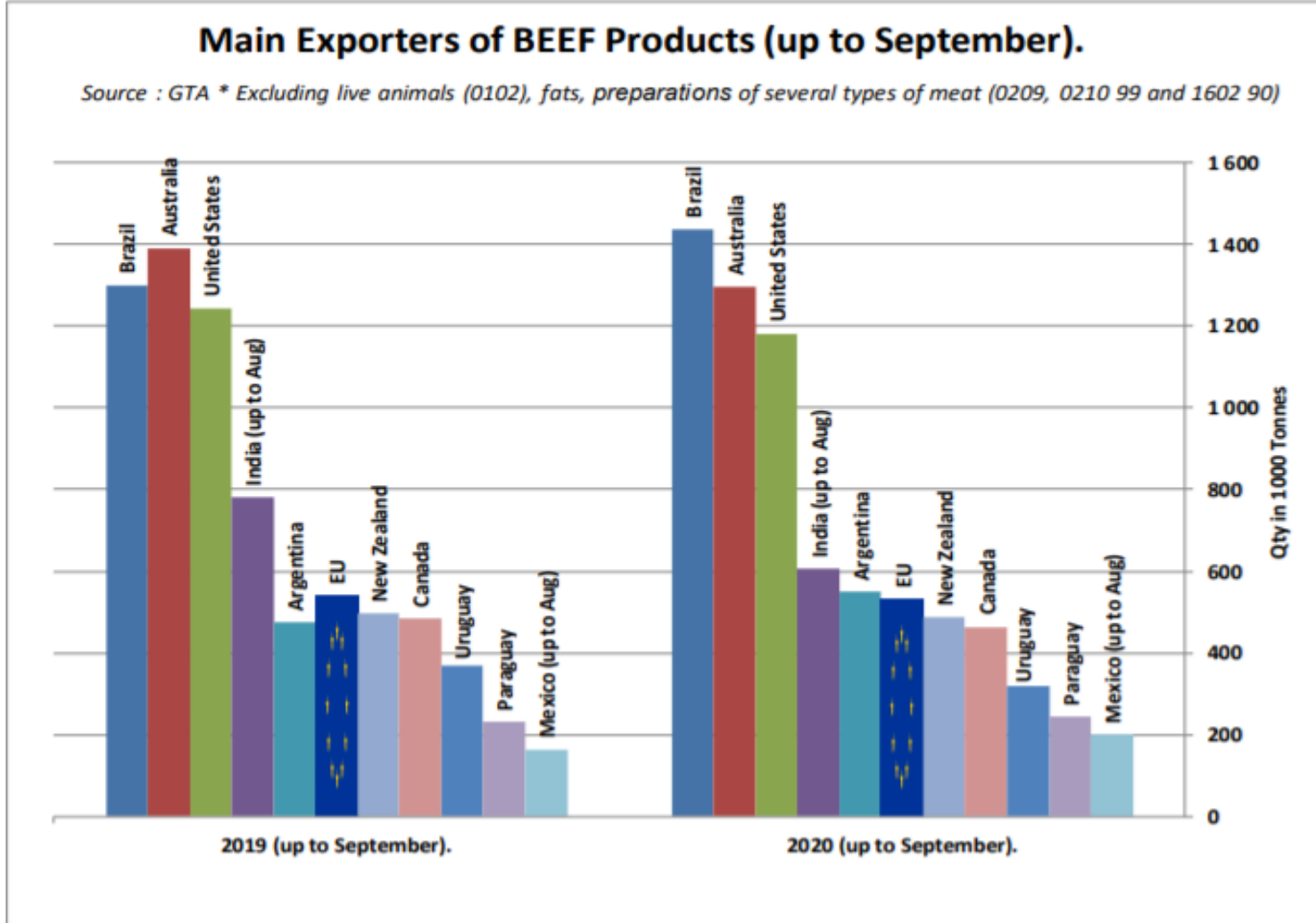
SIĞIR ETİ ÜRÜNLERİNİN NET İTHALATÇILARI (EYLÜL AYINA KADAR)





European
Commission

SIĞIR ETİ ÜRÜNLERİNİN NET İHRACATÇILARI (EYLÜL AYINA KADAR)

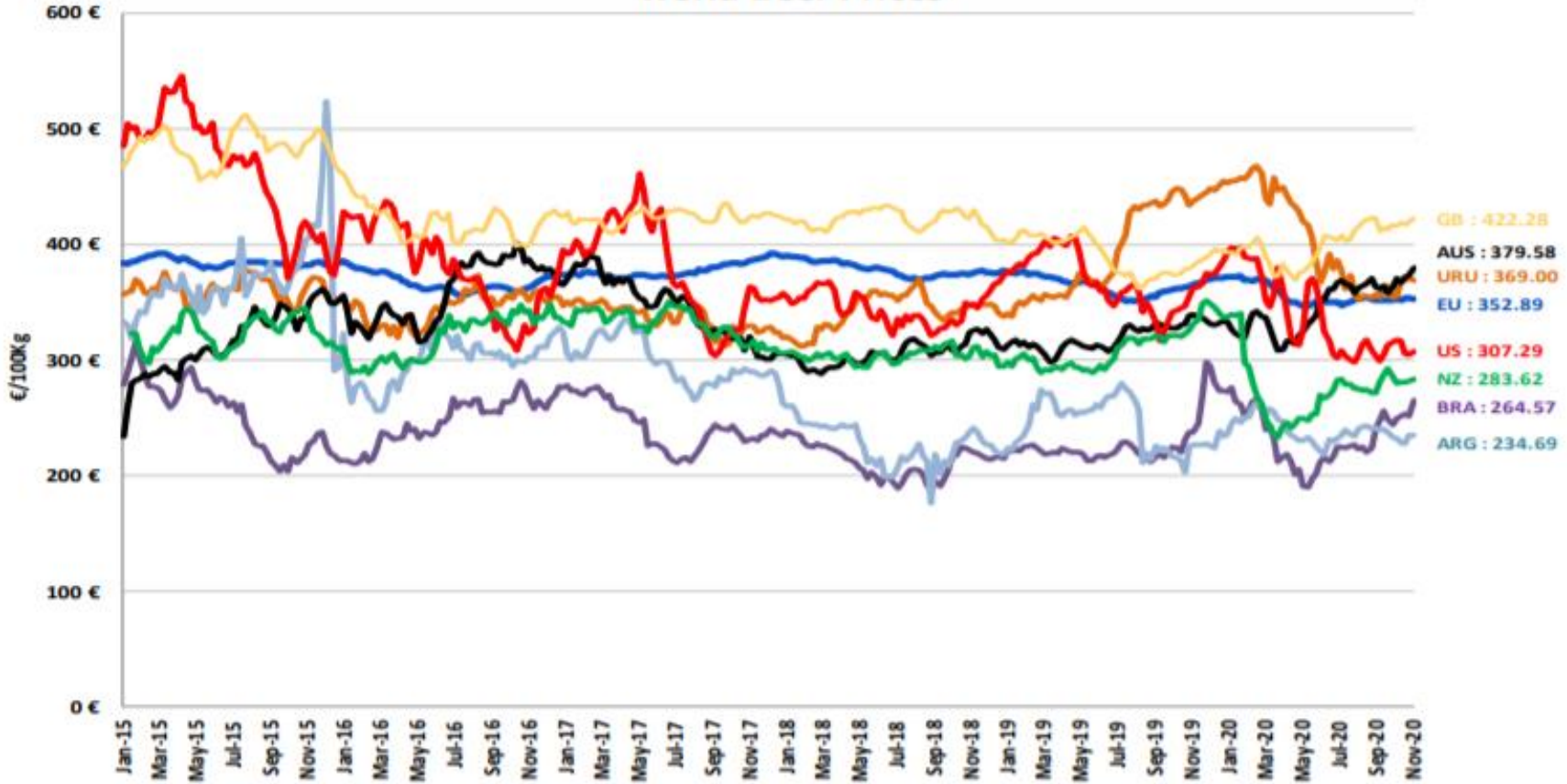


DÜNYA SIĞIR ETİ PAZARI



Dünya Sığır Fiyatları AB, ABD, AVUSTURYA, YENİ ZELANDA

World Beef Prices



EC
US
AU
UY
ARG
BR
NZ

http://www.inac.gub.uy/innovaportal/v/11034/10/innova_front/indicadores-y-precios
http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_de_l_novillo.html
<http://www.pecuaria.com.br/cotacoes.php>
http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_de_l_novillo.html



Daha fazla bilgi için:

https://ec.europa.eu/agriculture/market-observatory/meat_en

Ve Agri-FOOD Veri Portalı:

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