



AB SIĞIR VE DANA ETİ PAZAR DURUMU

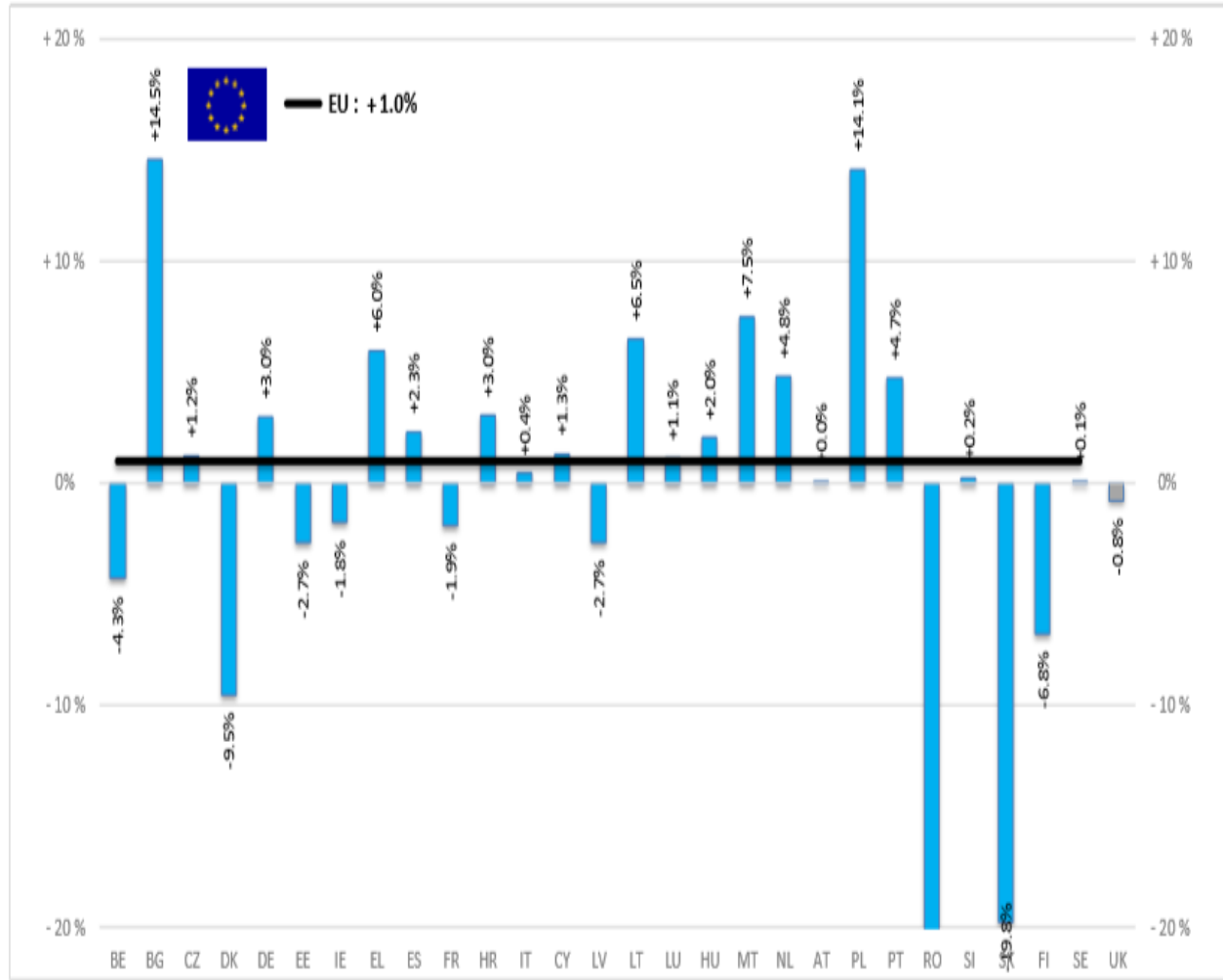
20 Mayıs 2020



European
Commission

BAŞ	HEADS	Jan-Feb 20/19	
		EU	EU + UK
BOĞA	Bull	+0.5%	+0.3%
ÖKÜZ	Bullock	+4.7%	+2.6%
İNEK	Cow	+1.5%	+1.2%
DÜVE	Heifer	+3.2%	+2.9%
BUZAĞI	Calve	-1.4%	-1.9%
GENÇ SİĞİR	Young cattle	+0.2%	+0.6%
Büyükbaş Hayvan Eti	Meat of bovine animals	+1.0%	+0.8%

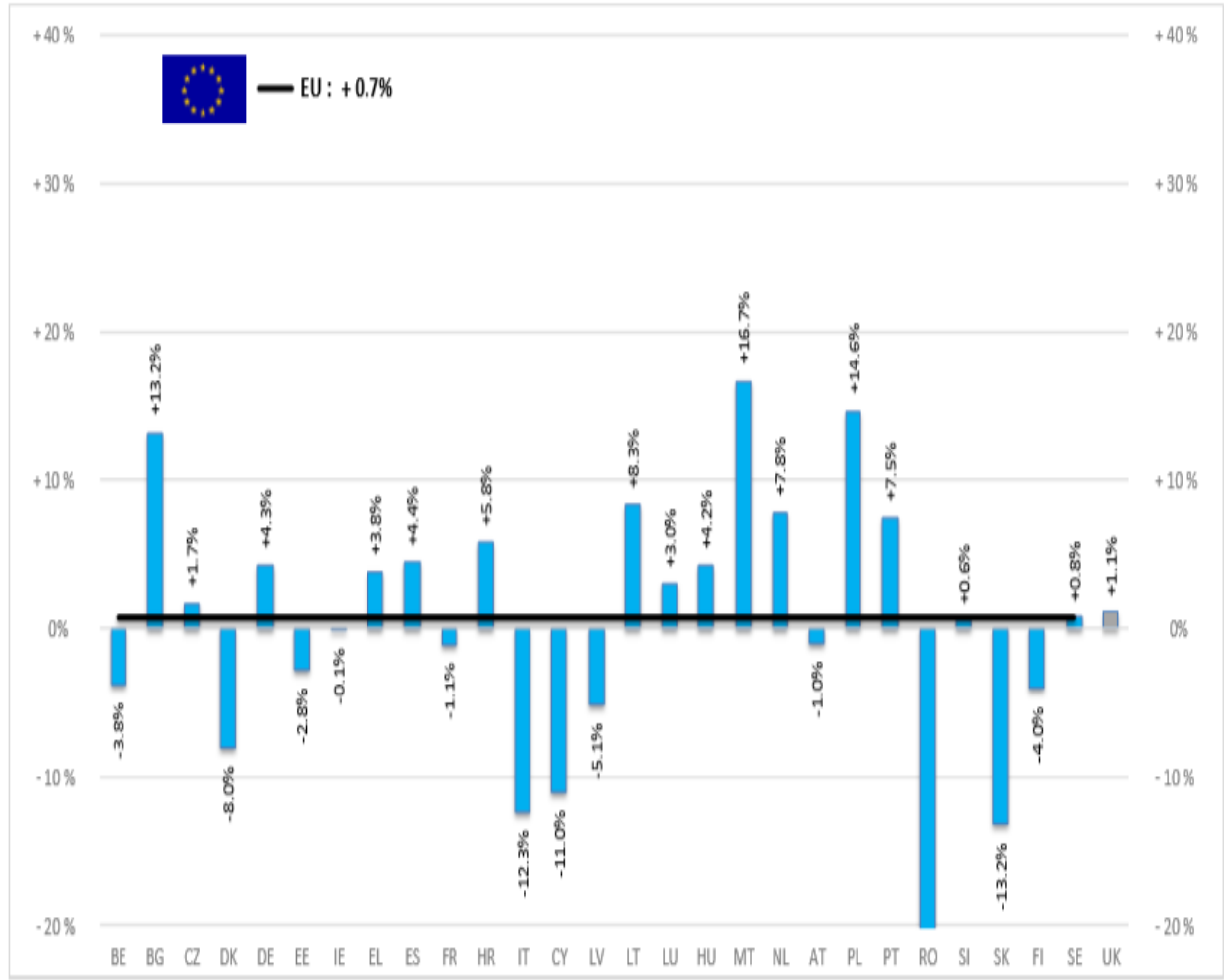
Estimates for last month of period :



Source : EStat - Newcronos

TON	TONNES	Jan-Feb 20/19	
		EU	EU + UK
BOĞA	Bull	+0.2%	+0.1%
	Bullock	+6.3%	+3.6%
İNİK	Cow	+0.8%	+0.7%
	Heifer	+0.4%	+0.9%
DÜVE	Calve	-3.3%	-3.4%
	Young cattle	+3.8%	+4.2%
GENÇ SIĞIR	Meat of bovine animals	+0.7%	+0.8%

Estimates for last month of period :

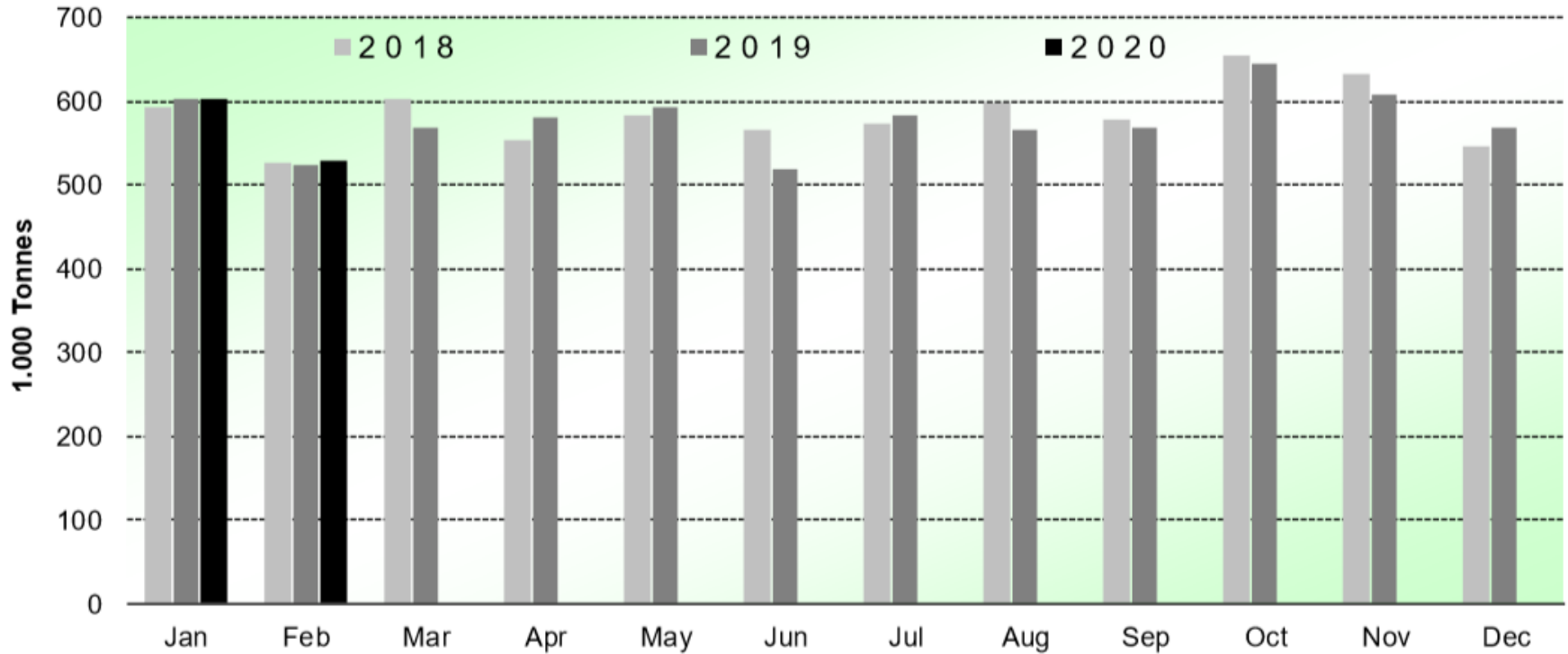


Source : EStat - Newcronos



SIĞIR VE DANA ETİ ÜRETİMİ (AB Kesimler – Ton)

Beef & Veal Production (EU Slaughtering) - Tonnes



Source : EStat-Newcronos



EU Prices week		19	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z-R3	345.8	- 0.7%	- 1.6%	- 5.7%
	Young Bovines (Z)	348.8	- 1.4%	- 1.9%	- 1.4%
	Young Bulls (A)	343.1	- 0.9%	- 2.1%	- 5.3%
	Steers (C)	350.3	+ 1.3%	+ 0.8%	- 11.6%
	Cows (D)	255.9	- 0.8%	- 0.7%	- 13.8%
	Heifers (E)	348.7	- 0.3%	- 1.2%	- 8.4%
Live Animals	Male Calves Dairy Type	64.67	- 1.8%	- 6.6%	- 39.7%
	Male Calves Beef Type	181.7	- 0.5%	- 1.8%	- 16.9%
	Young Store Cattle	2.43	+ 0.5%	+ 1.5%	+ 0.4%
	Yearling Male Store Cattle	2.34	+ 5.2%	+ 5.7%	+ 0.4%
	Yearling Female Store Cattle	2.33	- 1.1%	- 0.3%	- 4.1%
	Calves slaughtered <8M	413.5	- 1.1%	- 11.1%	- 12.0%

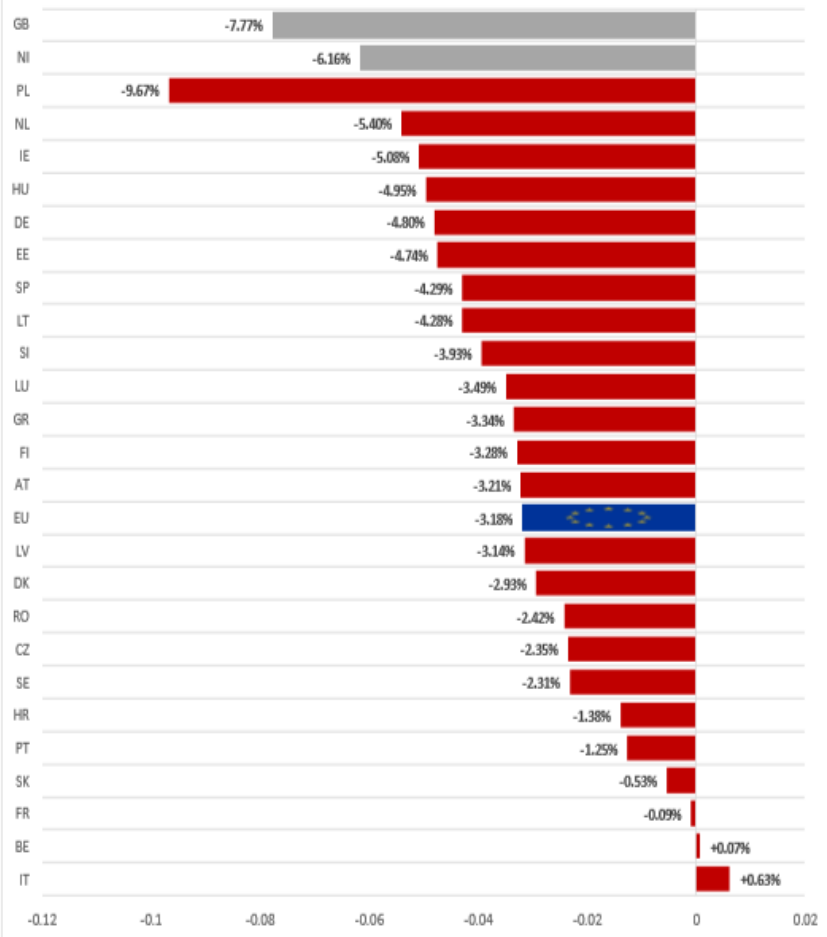
Sources : MSs notifications (Regulation (EU) 1182/2017 and 1184/2017)

KARKAS FİYATLARI

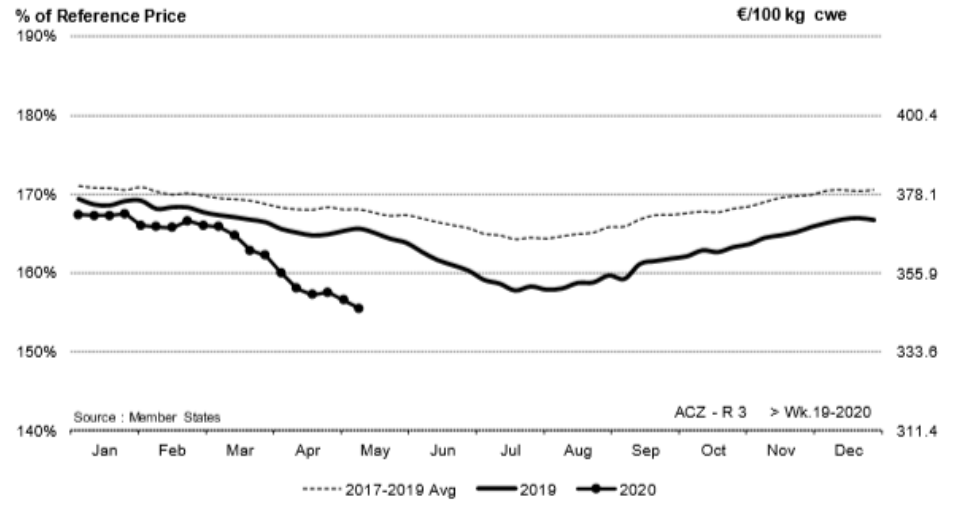
AB DEĞİŞİM A/C/Z. R3



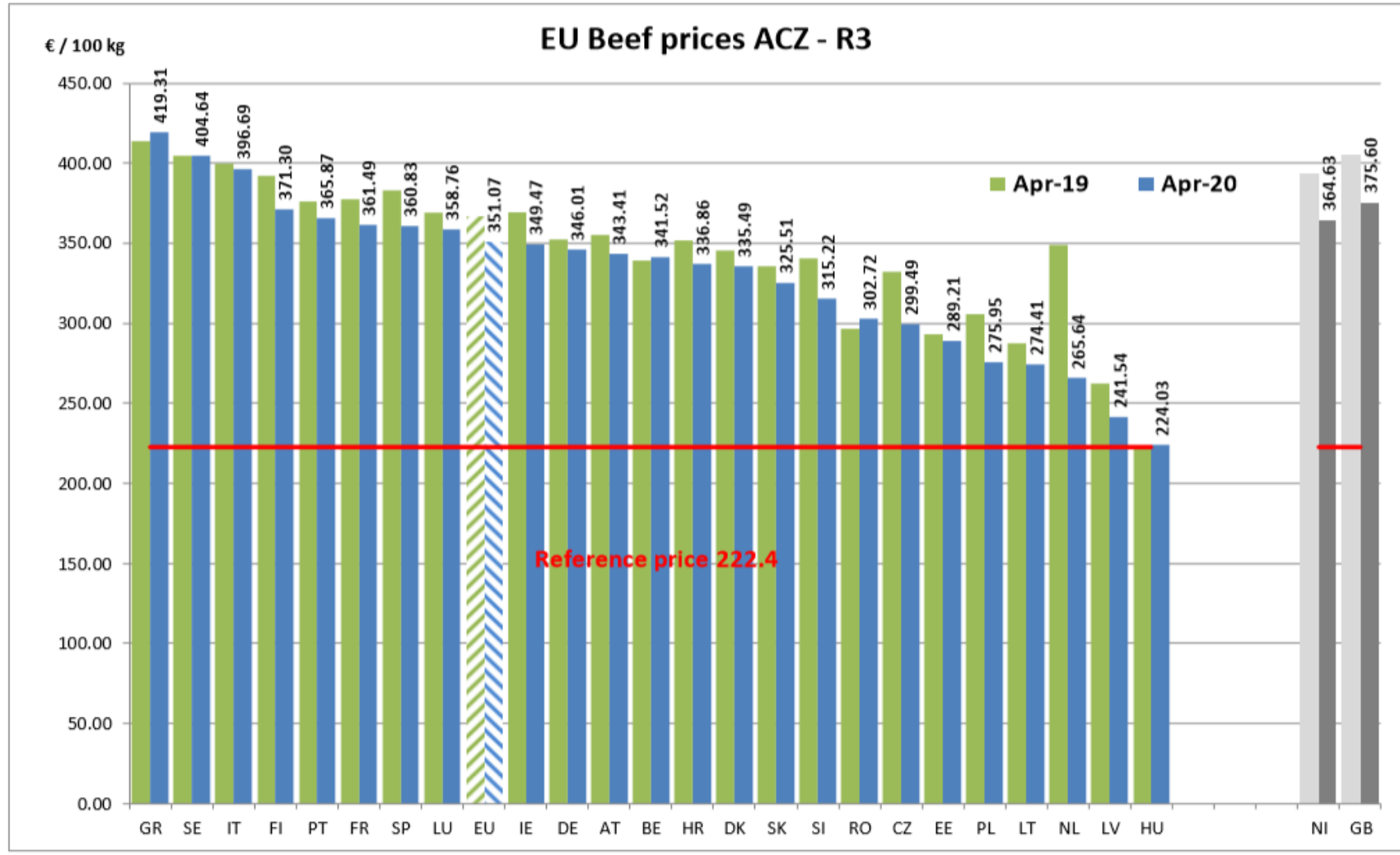
EU ACZ R3 Price Comparison between average monthly price May 2019 - April 2020 compared to May 2018 - April 2019



ACZ - R 3 > Wk.19-2020

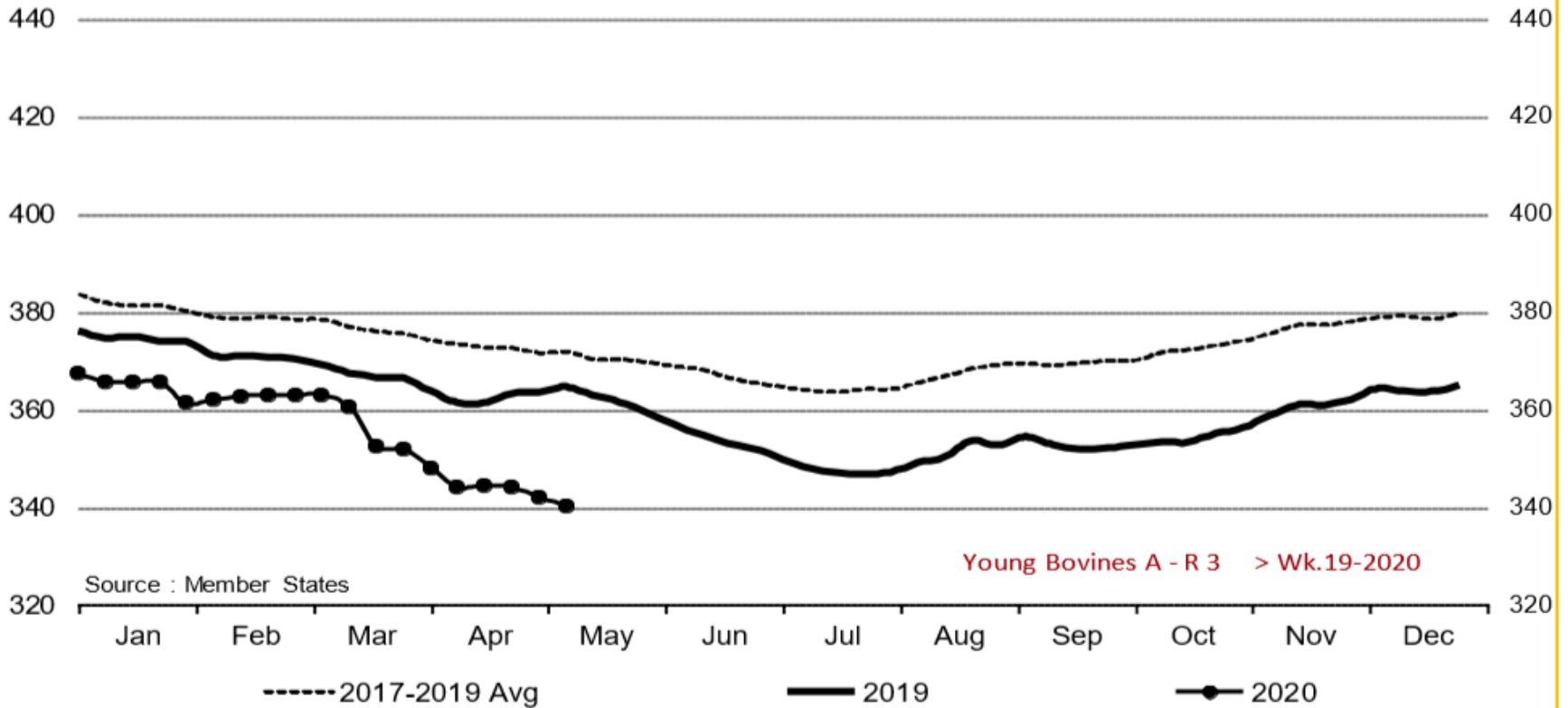


Price in week 19 :	345.81	Average price in April 2020 :	351.08
% change y/y :	- 6.1%	% change y/y :	- 4.4%
% Ref. Price in wk 19 :	155.5%		





Young Bovines A - R 3 > Wk.19-2020



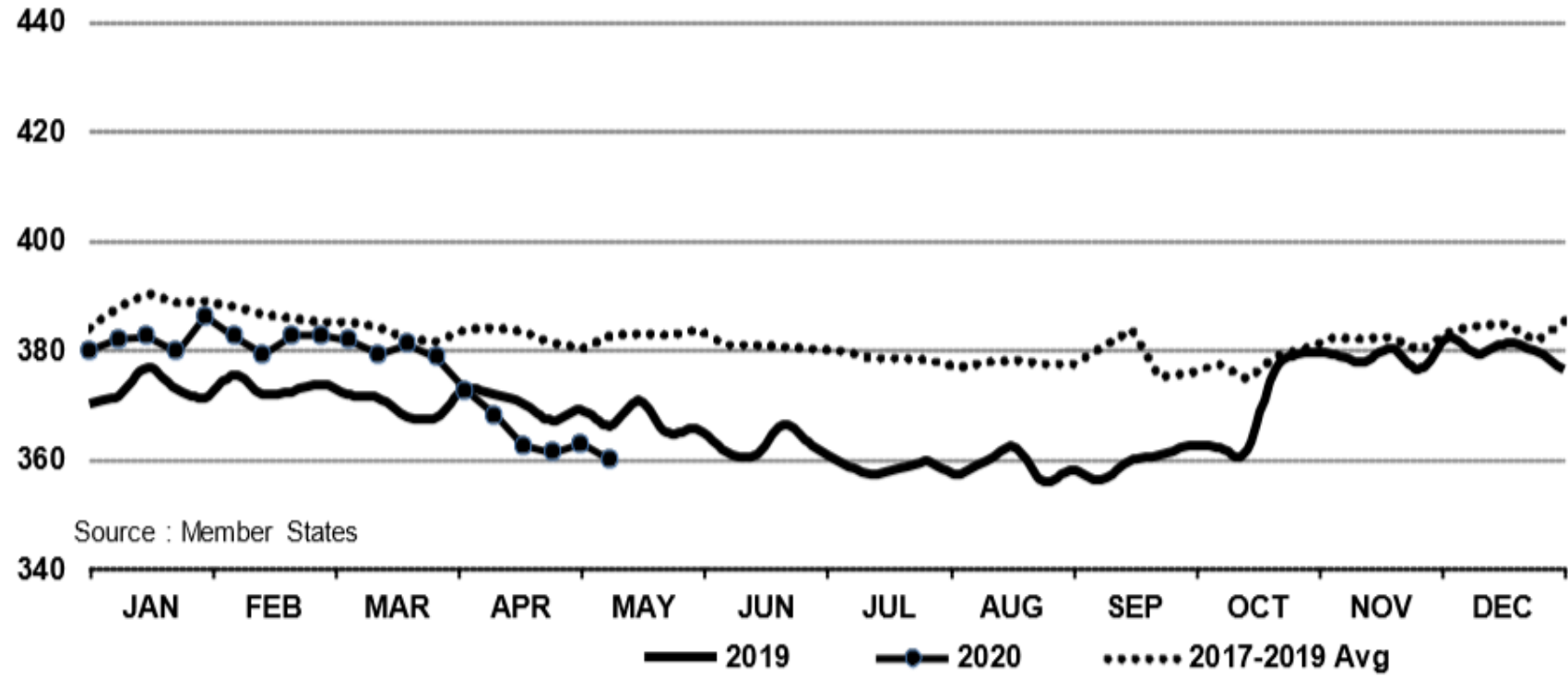
Price in week 19 : **340.13**
% change y/y : **- 6.7%**

Average price in April 2020 : **344.49**
% change y/y : **- 5.0%**



In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.19-2020

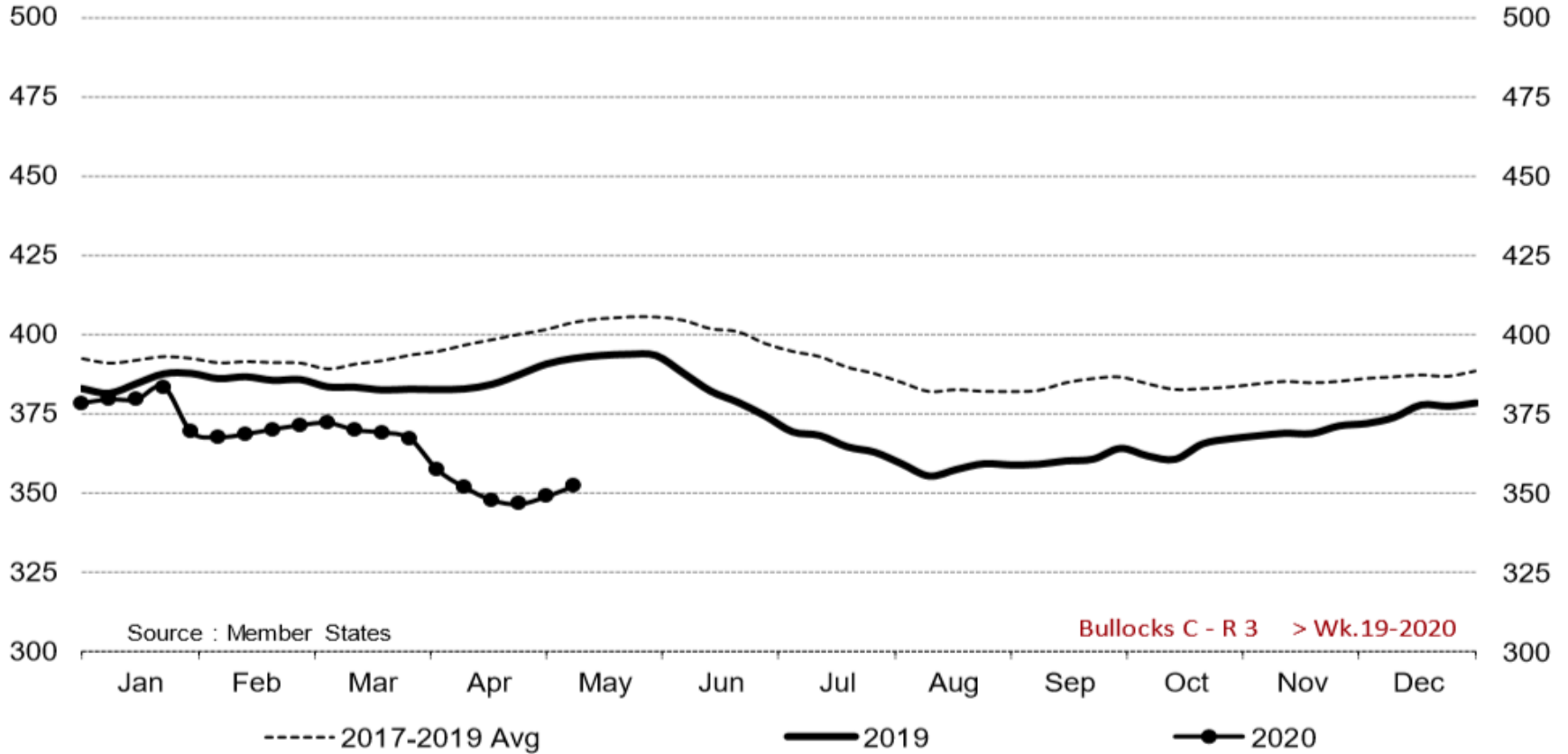


Source : Member States

Price in week 19 : **359.76** 09/04/2020 Average price in April 2020 : **365.19**
% change y/y : **- 1.7%** % change y/y : **- 1.4%**



Bullocks C - R 3 > Wk.19-2020

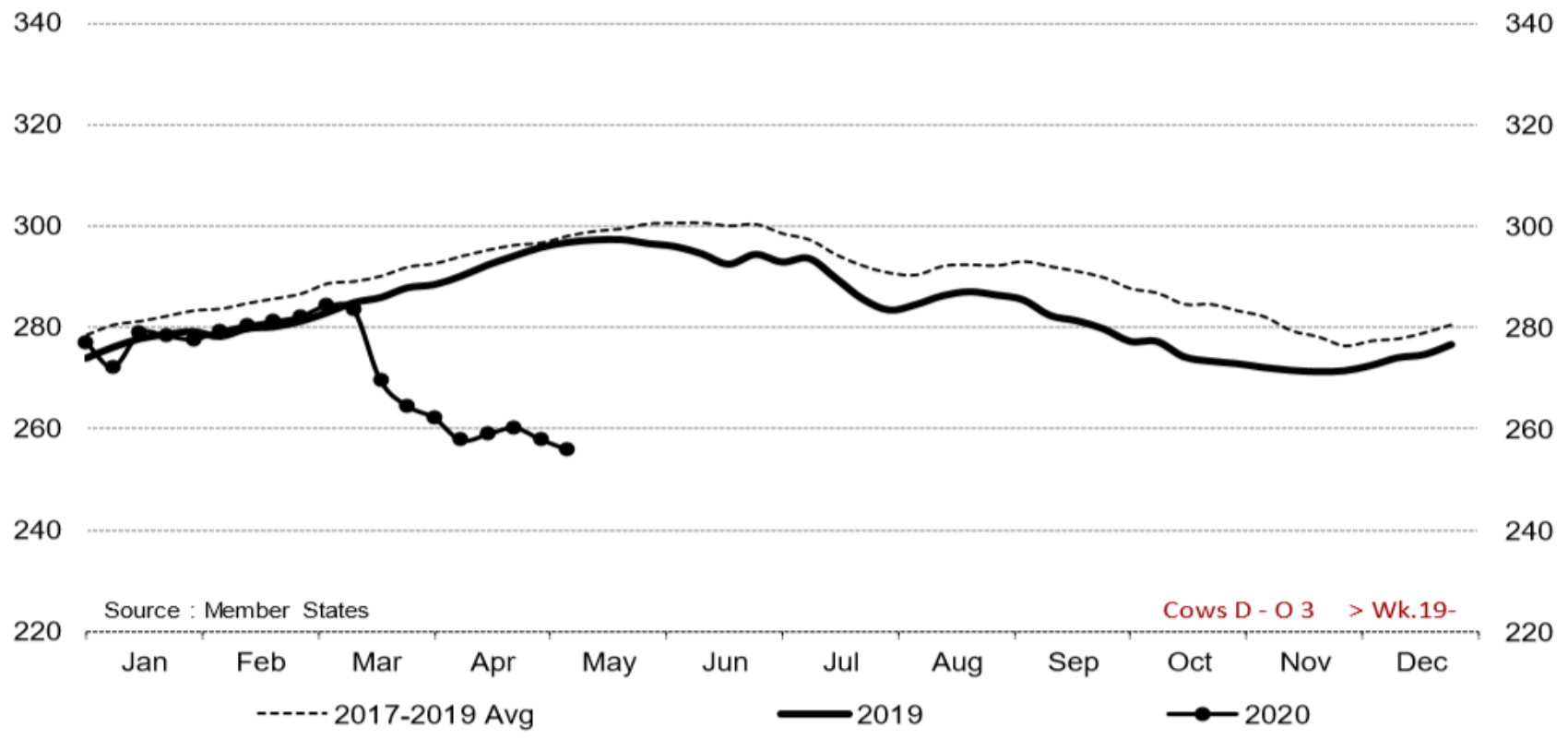


Price in week 19 : **352.12**
% change y/y : **- 10.2%**

Average price in April 2020 : **350.12**
% change y/y : **- 8.9%**



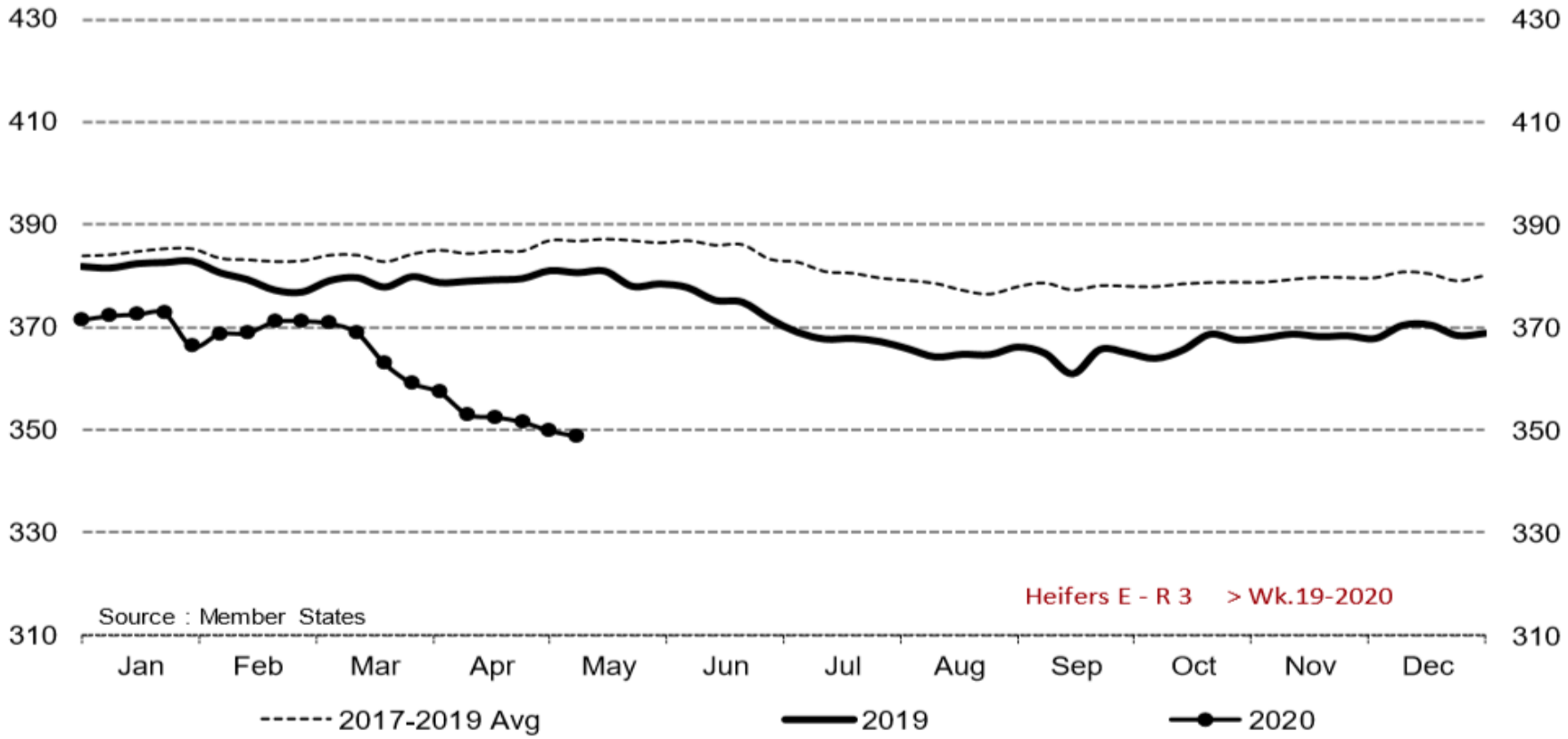
Cows D - O 3 > Wk.19-2020



Price in week 19 : 255.91	Average price in April 2020 : 259.37
% change y/y : - 13.8%	% change y/y : - 11.0%



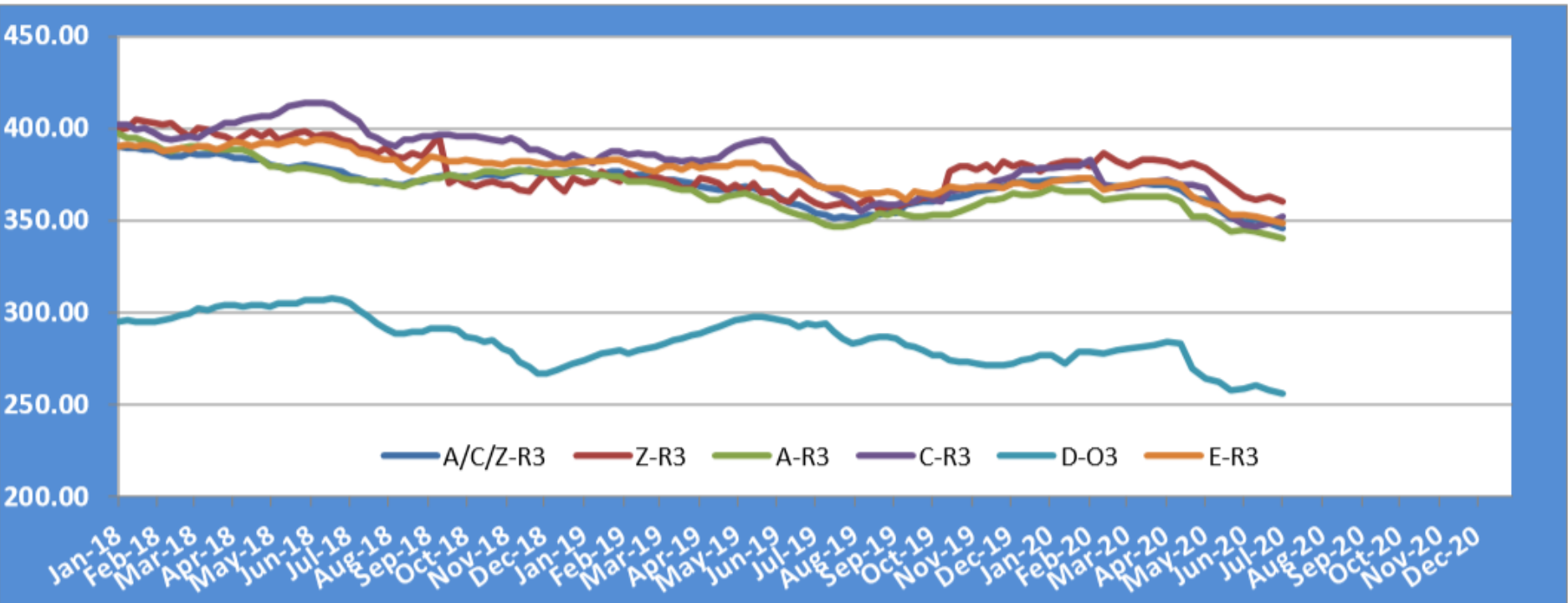
Heifers E - R 3 > Wk.19-2020



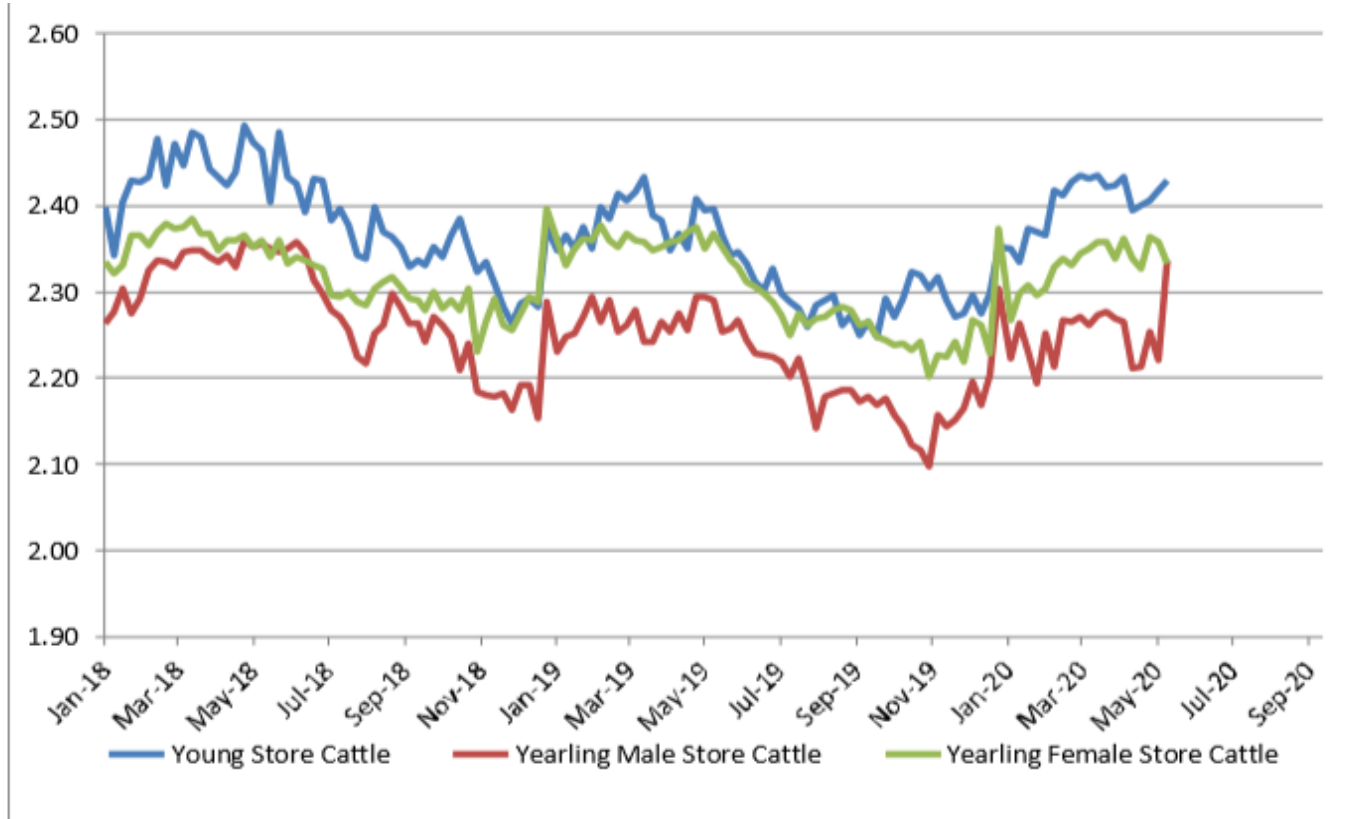
Price in week 19 : 348.79	Average price in April 2020 : 352.89
% change y/y : - 8.4%	% change y/y : - 6.9%

KARKAS FİYATLARI

AB TÜM KATEGORİLERE GLOBAL BAKIŞ



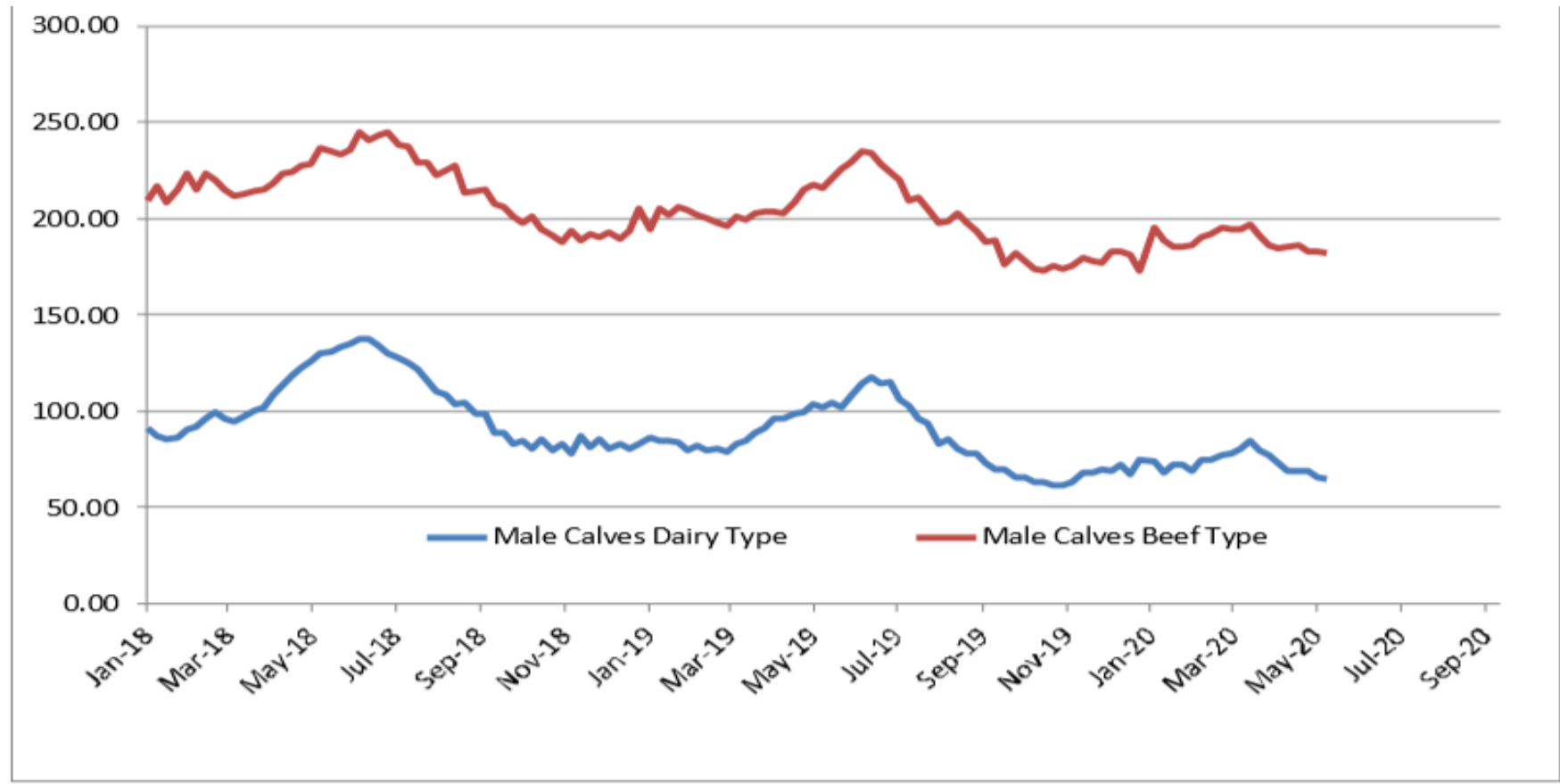
Besilik siğır (€ / 100 kg canlı ağırlık)



Young Store Cattle Price in	Week 19	2.43	Yearling Male Store Cattle Price	2.34
	Change y/y	+0.41%	Change y/y	+2.08%
Yearling Female Store Cattle Price		2.33		
	Change v/v	-4.06%		



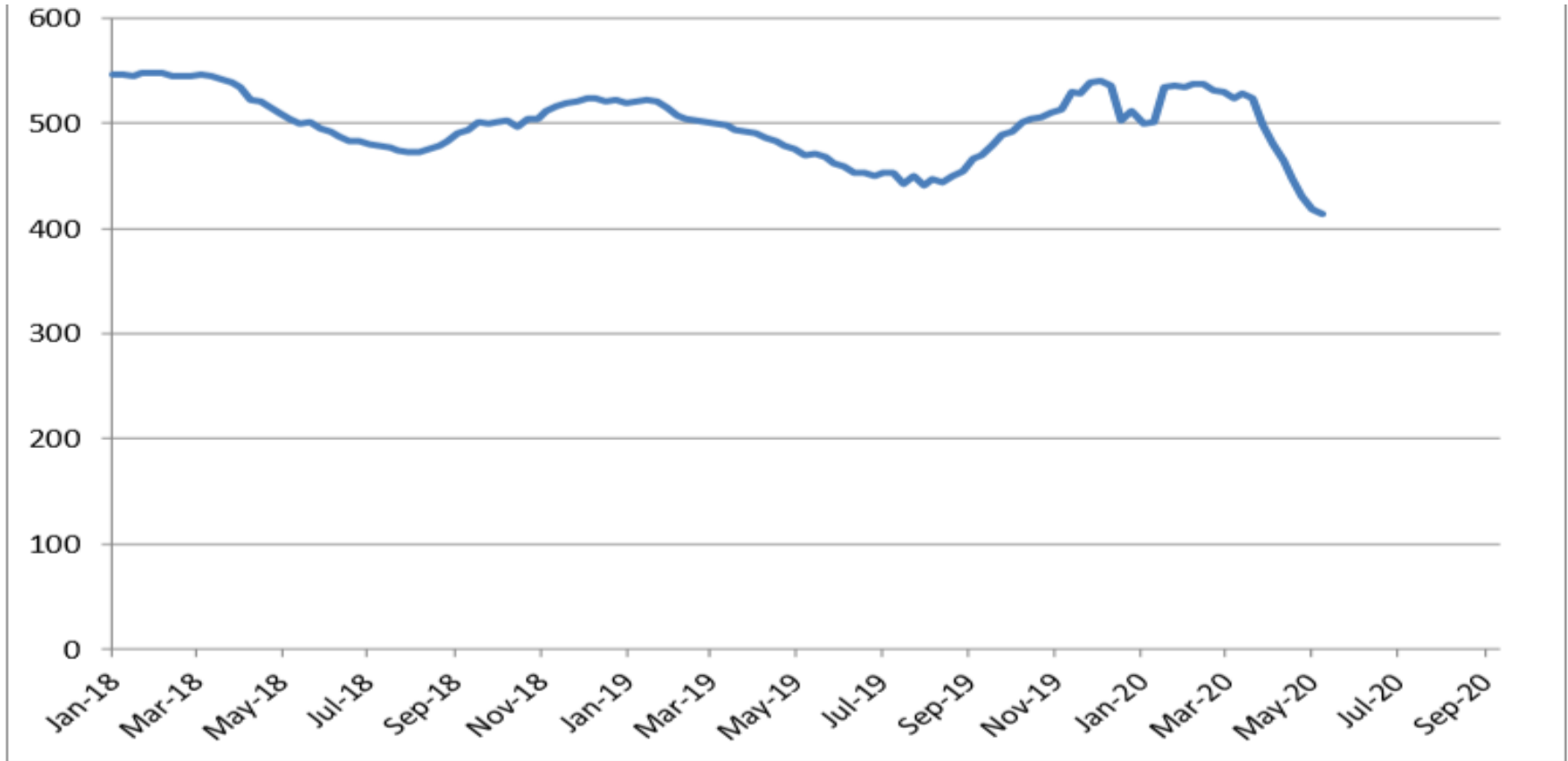
8 gün ve 4 haftalık erkek buzağılar (€ / baş)



Male Rearing Calves Beef type		Male Rearing Calves Dairy type	
Price in Week 19	181.77	Price in Week 19	64.67
Change y/y	-16.86%	Change y/y	-39.71%



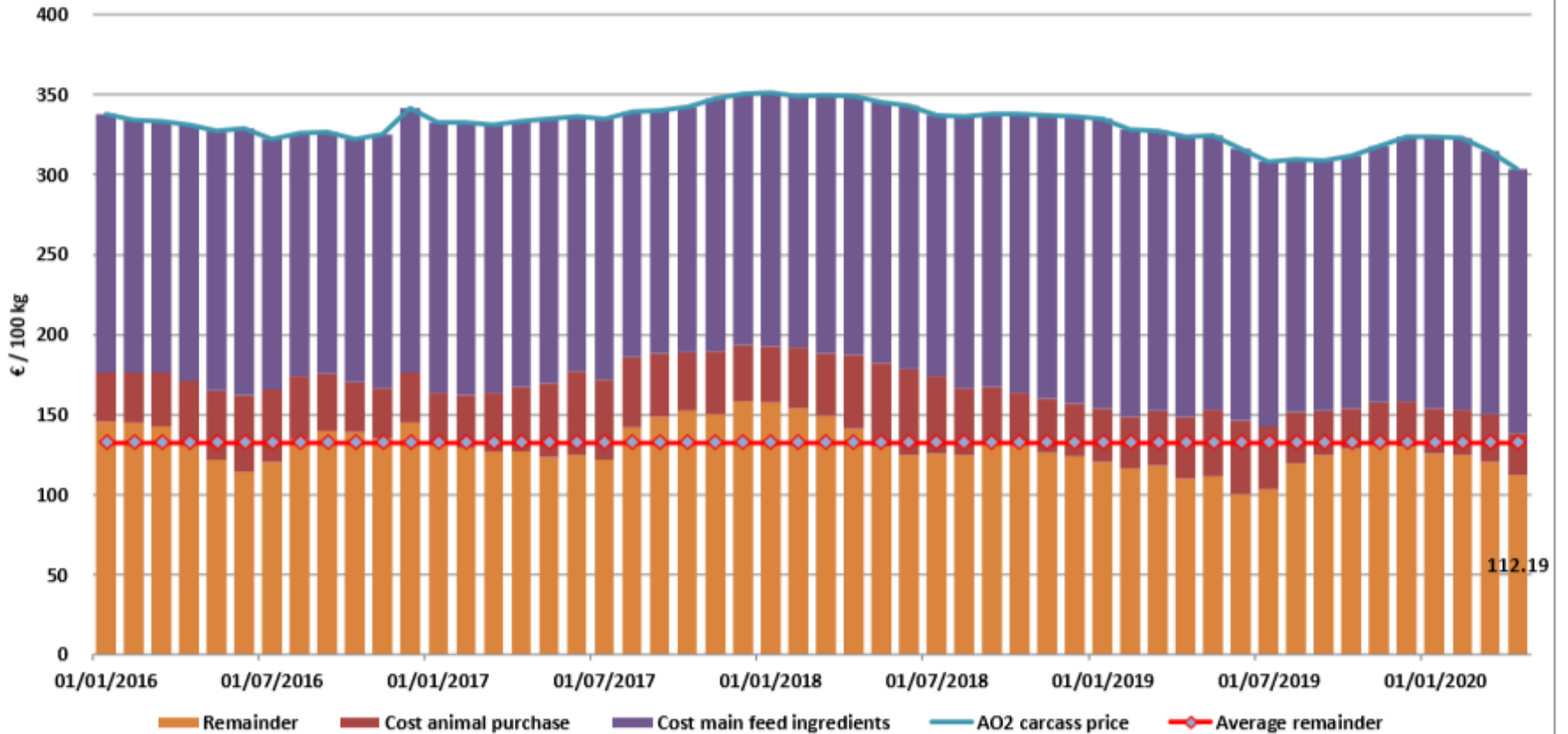
8 aylıktan küçük kesilen buzağlar (€ / 100 kg canlı ağırlık)



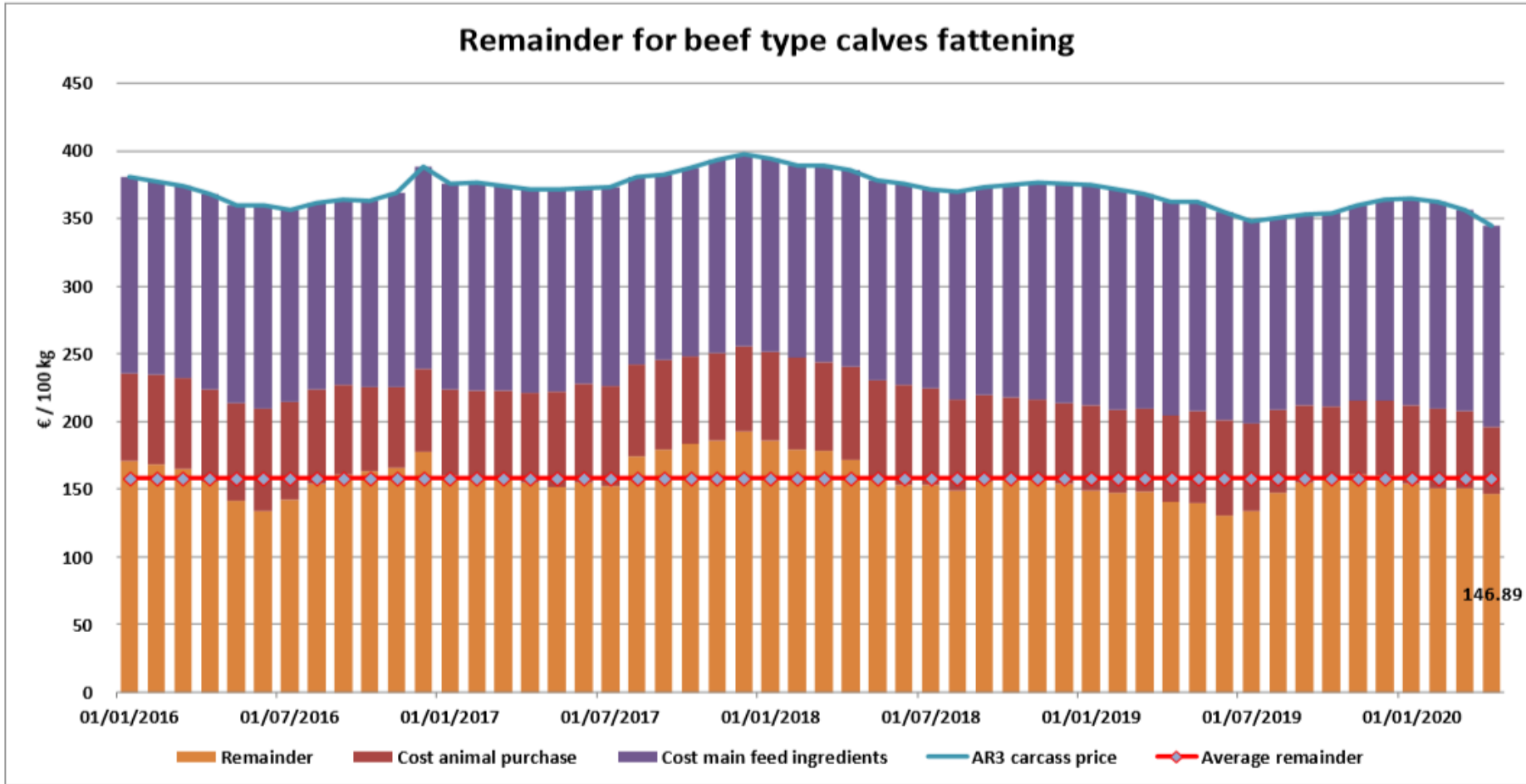
Price in Week 19 **413.59 € / 100 kg of carcasse weight**
Change y/ -12.05%

Süt Buzağları Besiciliği İçin Kalanlar

Remainder for dairy calves fattening

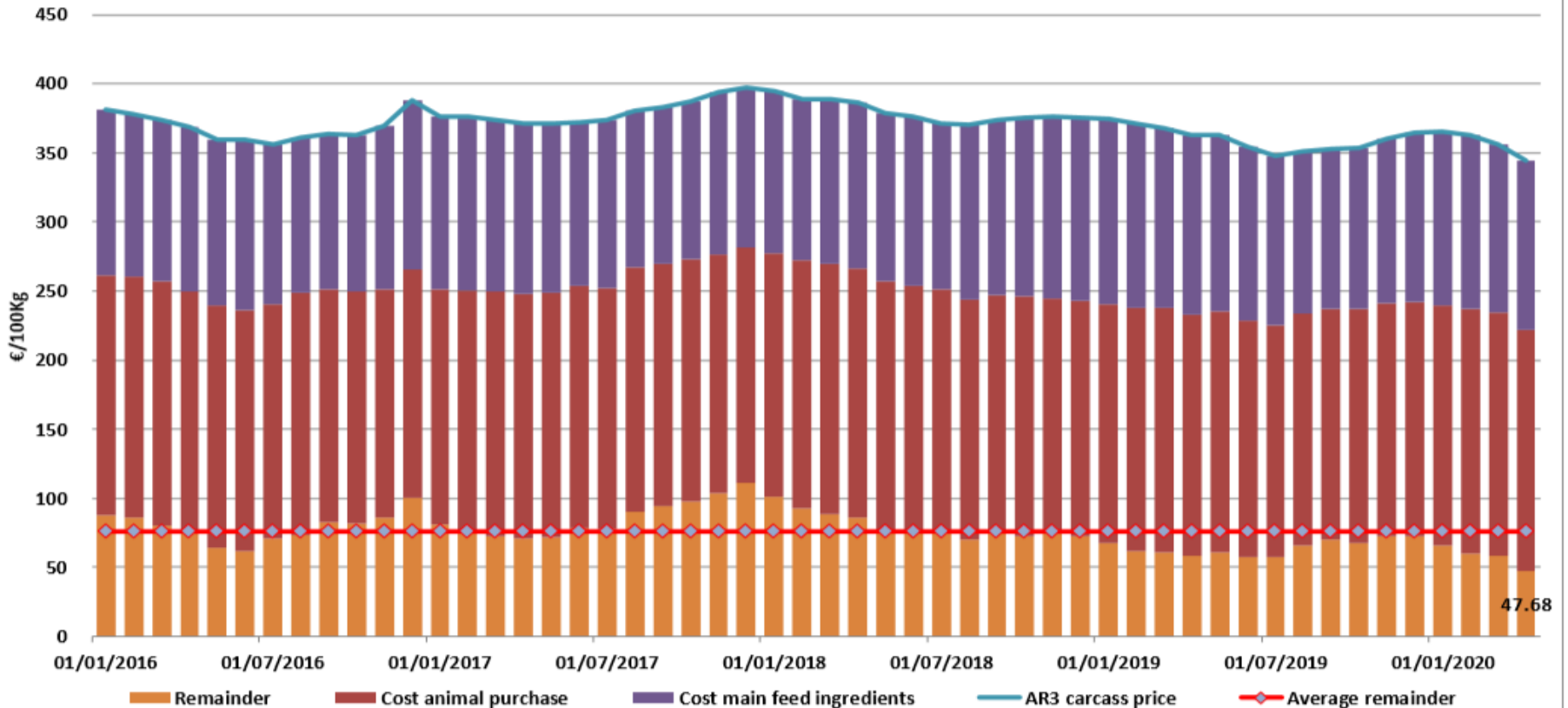


Sığır Tipi Buzağı Besiciliği İçin Kalanlar



Genç Besilik Sığır Besiciliği İçin Kalanlar

Remainder for young store cattle fattening



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

Destinations	2016		2017		2018		2019		Jan-Mar 20		Compared to Jan-Mar 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	477 394	41.5%	493 228	40.4%	486 487	40.9%	440 170	38.6%	90 434	34.3%	- 25.1%
Ghana	37 490	3.3%	37 744	3.1%	36 766	3.1%	39 224	3.4%	12 570	4.8%	+ 32.4%
Algeria	25 003	2.2%	26 305	2.2%	35 410	3.0%	57 152	5.0%	11 589	4.4%	+ 6.3%
Hong Kong	47 532	4.1%	76 085	6.2%	55 538	4.7%	46 748	4.1%	10 968	4.2%	- 18.2%
Israel	41 534	3.6%	44 196	3.6%	47 776	4.0%	49 684	4.4%	10 931	4.2%	- 25.7%
Philippines	24 116	2.1%	37 103	3.0%	28 766	2.4%	34 084	3.0%	9 517	3.6%	+ 29.5%
Ivory Coast	35 371	3.1%	36 038	3.0%	36 063	3.0%	33 450	2.9%	9 040	3.4%	+ 37.5%
Bosnia-Herz.	38 875	3.4%	34 710	2.8%	38 762	3.3%	41 145	3.6%	7 911	3.0%	- 9.8%
Switzerland	24 872	2.2%	26 707	2.2%	23 762	2.0%	25 188	2.2%	7 640	2.9%	+ 34.5%
Lebanon	47 010	4.1%	38 323	3.1%	42 542	3.6%	36 393	3.2%	7 616	2.9%	- 17.0%
China	10 253	0.9%	5 738	0.5%	6 713	0.6%	22 348	2.0%	6 803	2.6%	+ 113.5%
Libya	29 723	2.6%	27 848	2.3%	27 878	2.3%	24 541	2.2%	5 344	2.0%	+ 41.1%
Canada	862	0.1%	2 424	0.2%	2 225	0.2%	6 806	0.6%	4 572	1.7%	+++
Japan	3 254	0.3%	4 281	0.4%	3 453	0.3%	8 030	0.7%	4 283	1.6%	+++
Morocco	7 517	0.7%	10 005	0.8%	11 429	1.0%	12 982	1.1%	4 083	1.6%	+ 14.2%
Ukraine	7 875	0.7%	7 331	0.6%	10 466	0.9%	13 835	1.2%	4 036	1.5%	+ 15.7%
Turkey	71 030	6.2%	96 414	7.9%	96 072	8.1%	34 347	3.0%	3 977	1.5%	- 36.1%
Other Destinations	220 712	19.2%	216 270	17.7%	198 284	16.7%	214 370	18.8%	52 011	19.8%	
Extra-EU	1 150 422		1 220 750		1 188 392		1 140 499		263 324		
% change			+ 6%		- 3%		- 4%		- 5.7%		



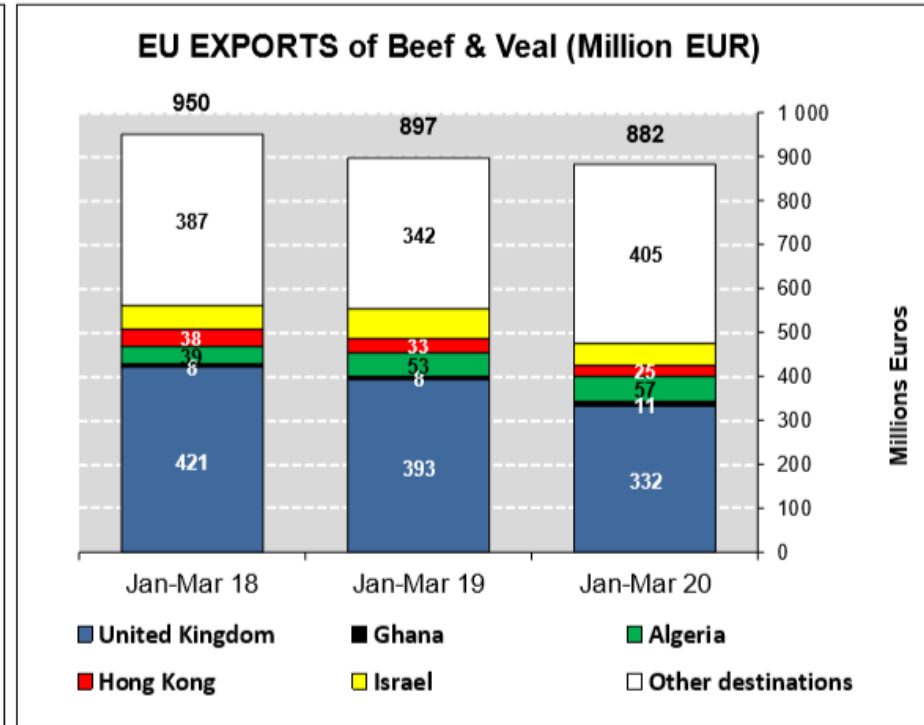
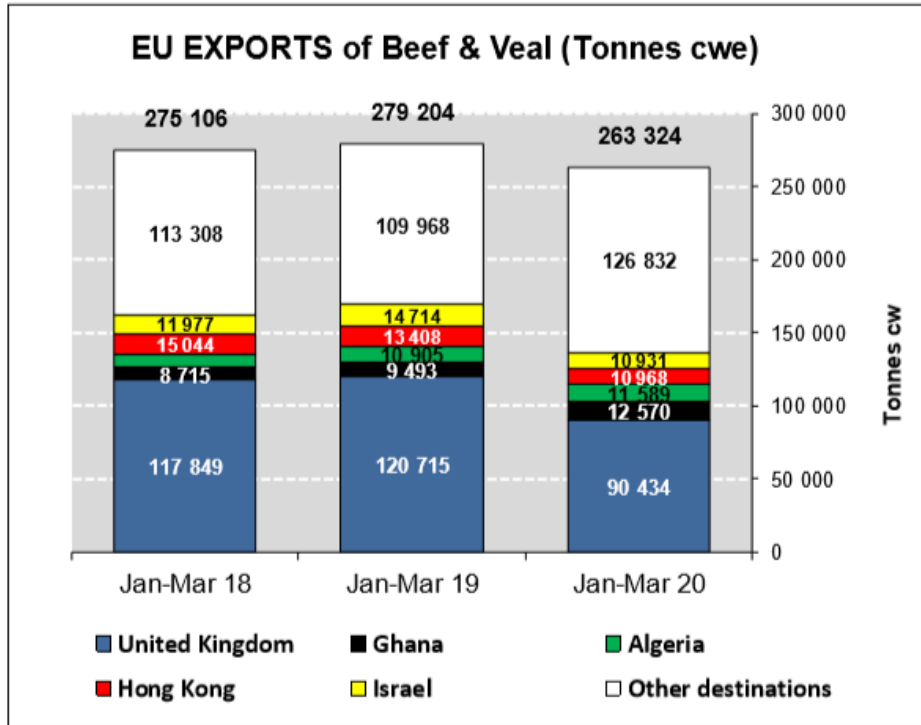
AB sığır eti ihracatı: Pazar Rakamları (COMEXT – ton ca)

Destinations	2016		2017		2018		2019		Jan-Mar 20		Compared to Jan-Mar 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	468 017	50.8%	482 057	49.5%	475 994	50.5%	430 080	47.5%	88 702	41.1%	- 24.9%
Ghana	37 490	4.1%	37 744	3.9%	36 766	3.9%	39 224	4.3%	12 570	5.8%	+ 32.4%
Hong Kong	47 532	5.2%	76 085	7.8%	55 538	5.9%	46 748	5.2%	10 968	5.1%	- 18.2%
Philippines	24 116	2.6%	37 103	3.8%	28 766	3.1%	34 084	3.8%	9 517	4.4%	+ 29.5%
Ivory Coast	35 371	3.8%	36 028	3.7%	36 063	3.8%	33 450	3.7%	9 040	4.2%	+ 37.5%
Bosnia-Herz.	36 790	4.0%	32 180	3.3%	36 151	3.8%	38 832	4.3%	7 408	3.4%	- 10.8%
Switzerland	23 704	2.6%	25 569	2.6%	22 712	2.4%	24 110	2.7%	7 298	3.4%	+ 35.2%
China	10 253	1.1%	5 738	0.6%	6 713	0.7%	22 348	2.5%	6 803	3.2%	+++
Israel	15 055	1.6%	18 749	1.9%	22 163	2.4%	23 073	2.5%	5 742	2.7%	- 19.7%
Canada	862	0.1%	2 424	0.2%	2 225	0.2%	6 806	0.8%	4 572	2.1%	+++
Algeria	10 726	1.2%	12 304	1.3%	13 919	1.5%	19 142	2.1%	4 469	2.1%	+ 47.7%
Japan	3 254	0.4%	4 281	0.4%	3 453	0.4%	8 030	0.9%	4 283	2.0%	+++
Ukraine	7 094	0.8%	6 926	0.7%	9 887	1.0%	12 893	1.4%	4 009	1.9%	+ 15.0%
Norway	18 307	2.0%	12 848	1.3%	7 922	0.8%	7 667	0.8%	2 892	1.3%	+ 36.8%
Angola	13 326	1.4%	10 982	1.1%	11 469	1.2%	8 454	0.9%	2 787	1.3%	+ 72.1%
USA	3 137	0.3%	3 756	0.4%	5 458	0.6%	7 867	0.9%	2 675	1.2%	+ 69.4%
North Macedonia	11 413	1.2%	11 285	1.2%	10 002	1.1%	11 395	1.3%	2 553	1.2%	+ 11.5%
Other Destinations	154 788	16.8%	158 376	16.3%	157 617	16.7%	131 509	14.5%	29 308	13.6%	
Extra-EU	921 234		974 437		942 818		905 712		215 597		
% change			+ 6%		- 3%		- 4%		- 5.7%		



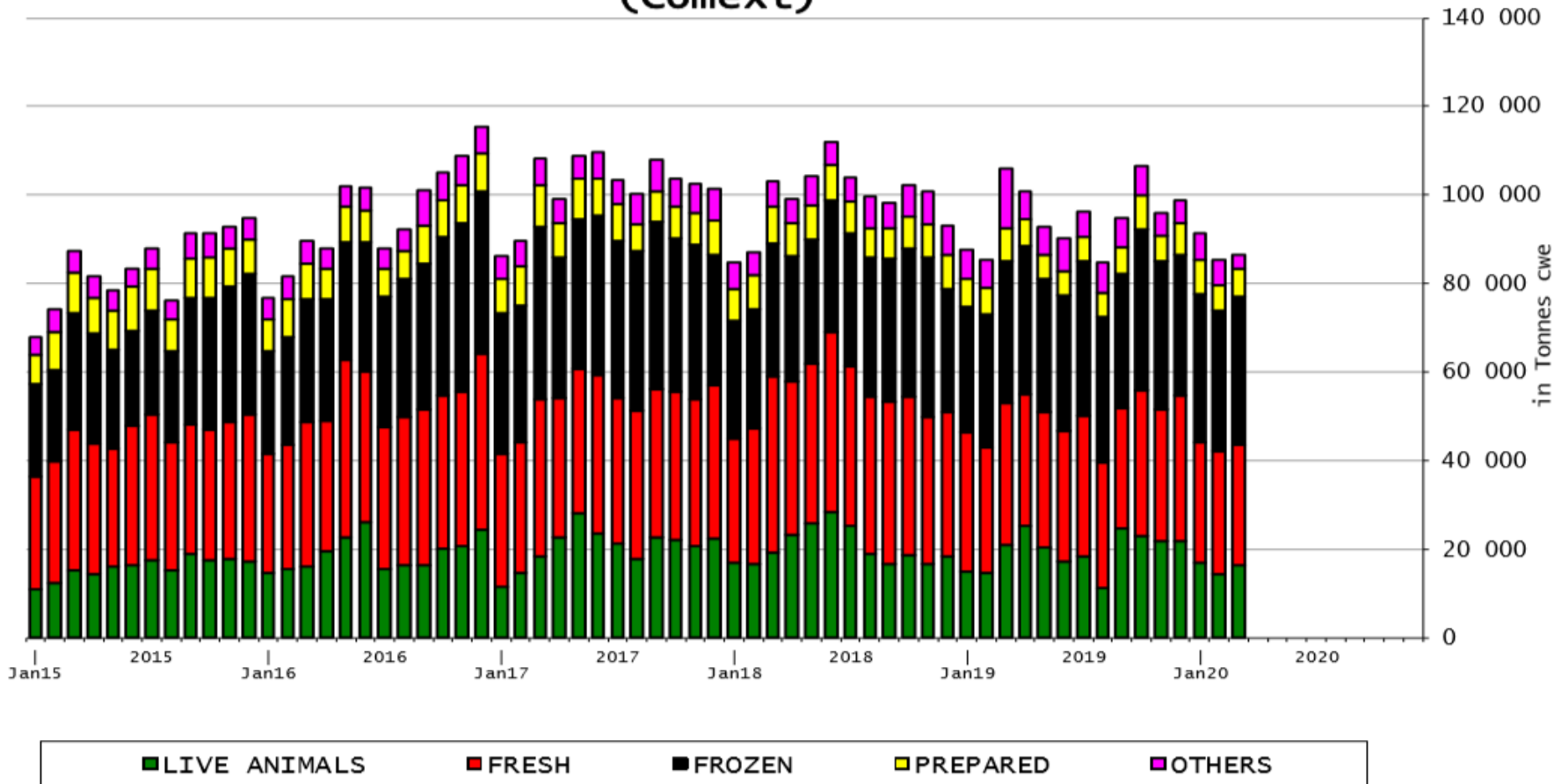
European Commission

AB Sığır Eti ve Canlı Hayvan İhracat Pazar Rakamları (COMEXT)



AB 28 – Sığır Eti Ürünleri İhracatları

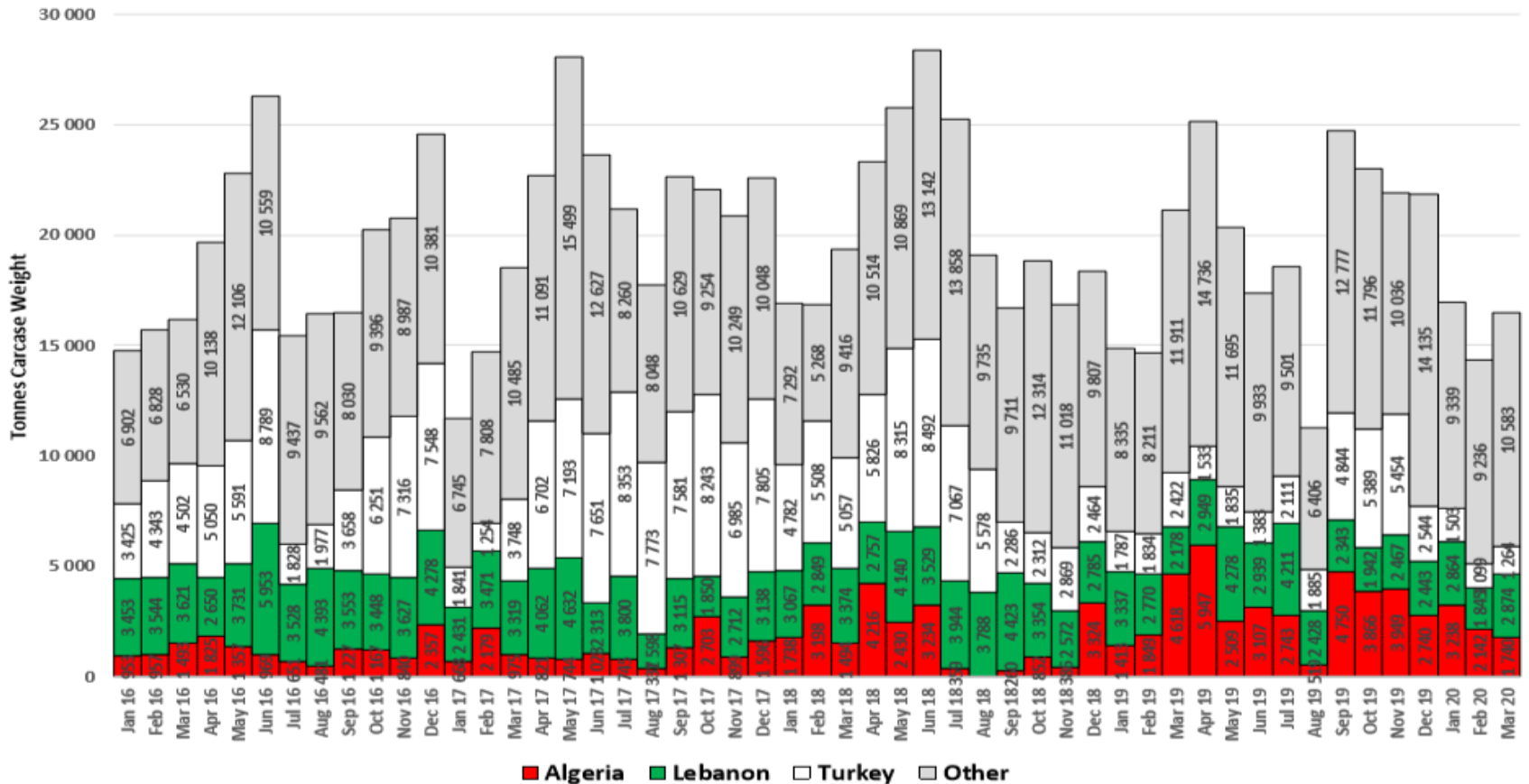
EU Exports of BEEF products
(Comext)





AB'nin Canlı Hayvan İhracatı - ton ca

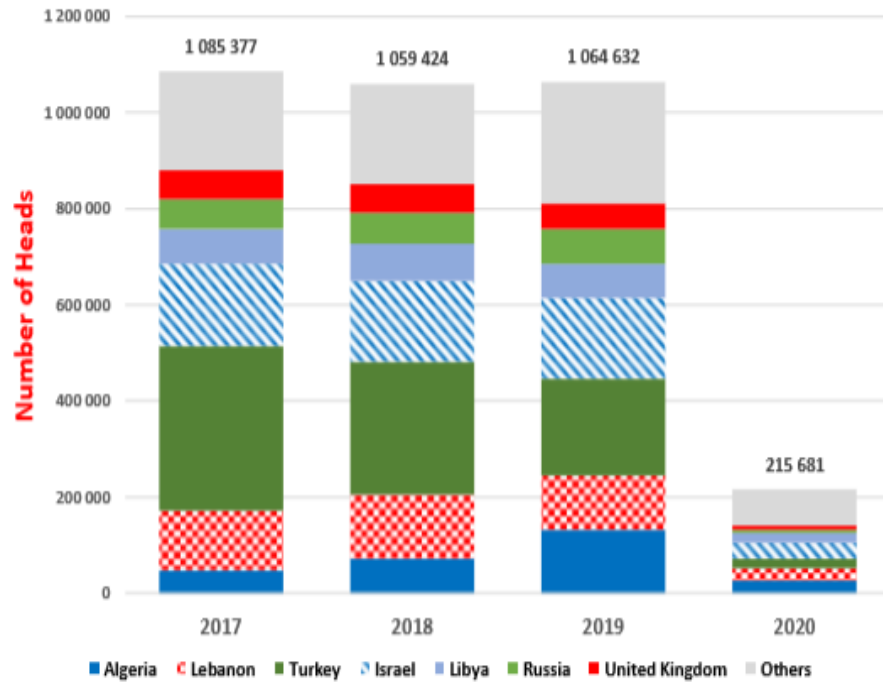
EU Exports of LIVE Bovine Animals
(source COMEXT - Tonnes cwe)



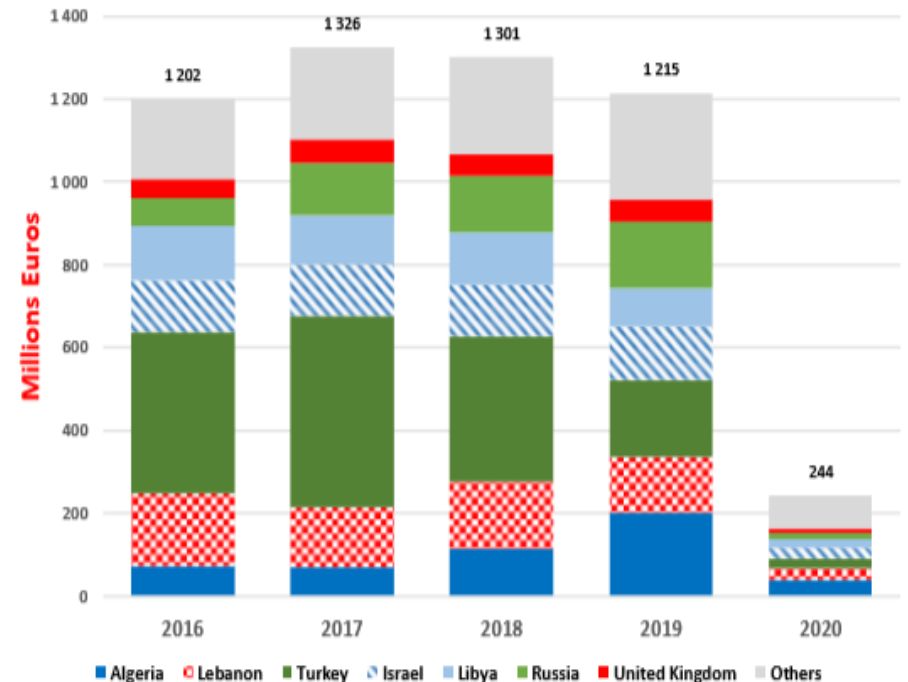


European
Commission

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



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



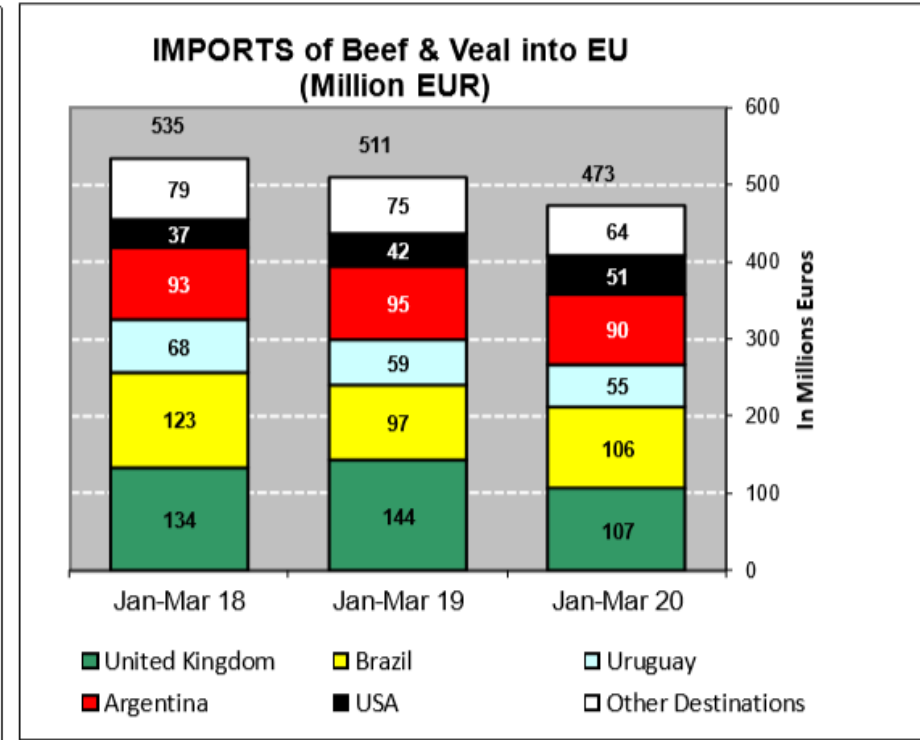
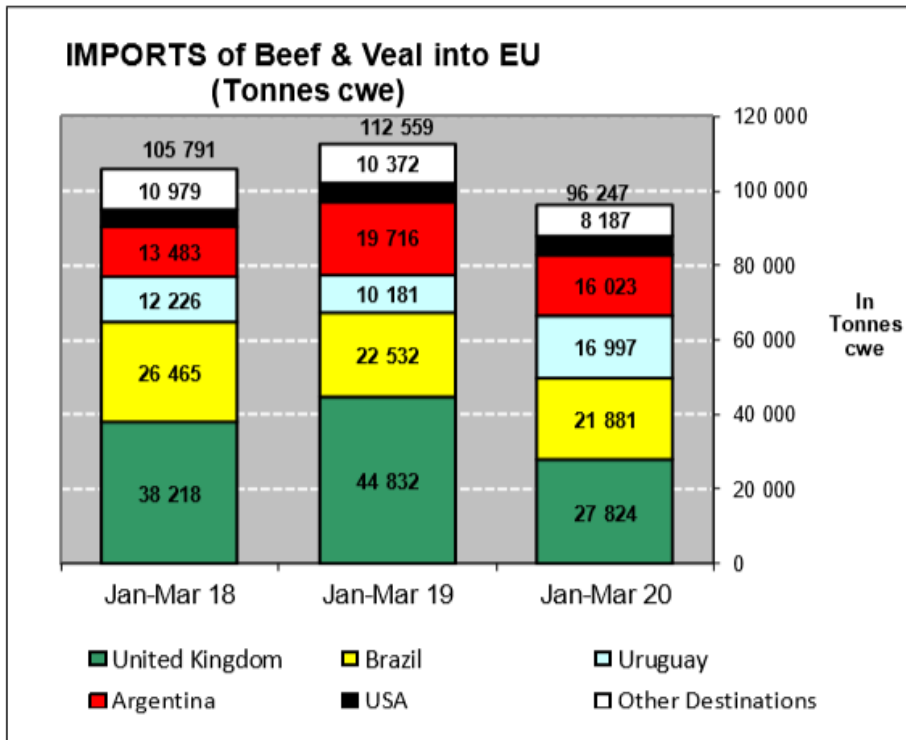


AB Sığır Eti ve Canlı Hayvan İthalatları (1): Ticaret Verileri (COMEXT – ton ca)

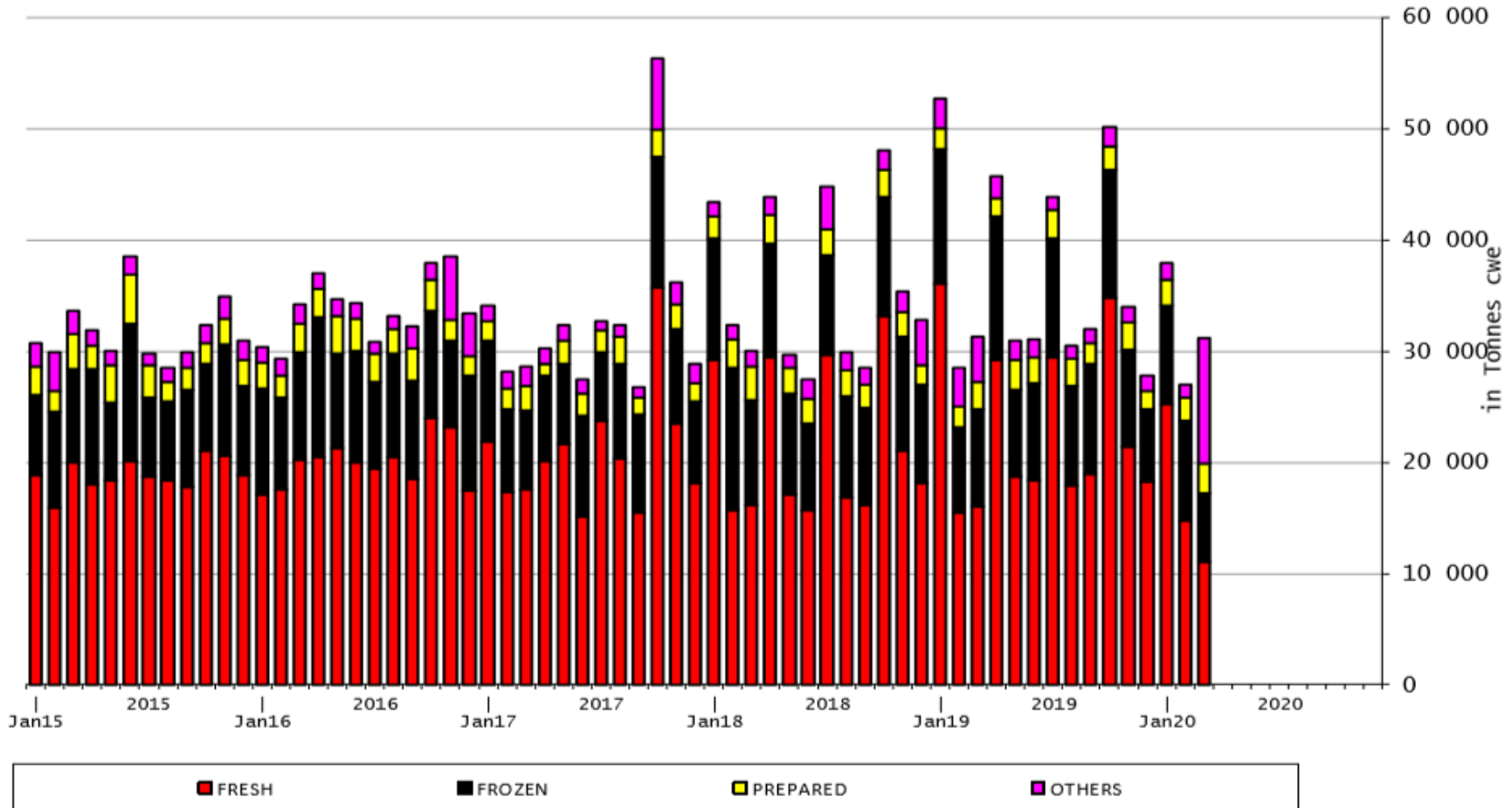
Origins	2016		2017		2018		2019		Jan-Mar 20		Compared to Jan-Mar 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	134 098	33.0%	133 588	33.9%	138 603	32.5%	159 683	36.4%	27 824	28.9%	- 37.9%
Brazil	100 982	24.9%	87 156	22.1%	103 979	24.4%	99 510	22.7%	21 881	22.7%	- 2.9%
Uruguay	52 896	13.0%	55 212	14.0%	48 712	11.4%	40 460	9.2%	16 997	17.7%	+ 66.9%
Argentina	43 111	10.6%	49 260	12.5%	69 011	16.2%	70 612	16.1%	16 023	16.6%	- 18.7%
USA	20 290	5.0%	21 624	5.5%	19 268	4.5%	16 852	3.8%	5 334	5.5%	+ 8.3%
Australia	21 909	5.4%	18 193	4.6%	17 368	4.1%	16 526	3.8%	2 940	3.1%	- 19.8%
New Zealand	8 274	2.0%	6 806	1.7%	7 164	1.7%	6 724	1.5%	1 649	1.7%	+ 15.4%
Switzerland	5 496	1.4%	5 138	1.3%	5 437	1.3%	4 432	1.0%	1 199	1.2%	- 3.6%
Paraguay	5 309	1.3%	5 922	1.5%	5 520	1.3%	5 204	1.2%	920	1.0%	- 30.0%
Serbia	557	0.1%	565	0.1%	1 134	0.3%	1 062	0.2%	337	0.4%	+ 41.8%
Namibia	6 281	1.5%	5 043	1.3%	3 442	0.8%	7 703	1.8%	313	0.3%	- 50.9%
Botswana	4 204	1.0%	2 686	0.7%	3 119	0.7%	4 950	1.1%	265	0.3%	- 62.8%
Canada	392	0.1%	512	0.1%	1 343	0.3%	2 518	0.6%	179	0.2%	- 71.3%
Ukraine	317	0.1%	374	0.1%	257	0.1%	410	0.1%	87	0.1%	- 17.8%
Chile	575	0.1%	319	0.1%	356	0.1%	392	0.1%	84	0.1%	+ 8.1%
Japan	518	0.1%	646	0.2%	791	0.2%	998	0.2%	73	0.1%	- 67.2%
Israel	0	0.0%	20	0.0%	0	0.0%	160	0.0%	44	0.0%	+++
Other Destinations	981	0.2%	1 020	0.3%	888	0.2%	612	0.1%	98	0.1%	
Extra-EU	406 191		394 085		426 391		438 807		96 247		
% change			- 3%		+ 8%		+ 3%		- 14.5%		



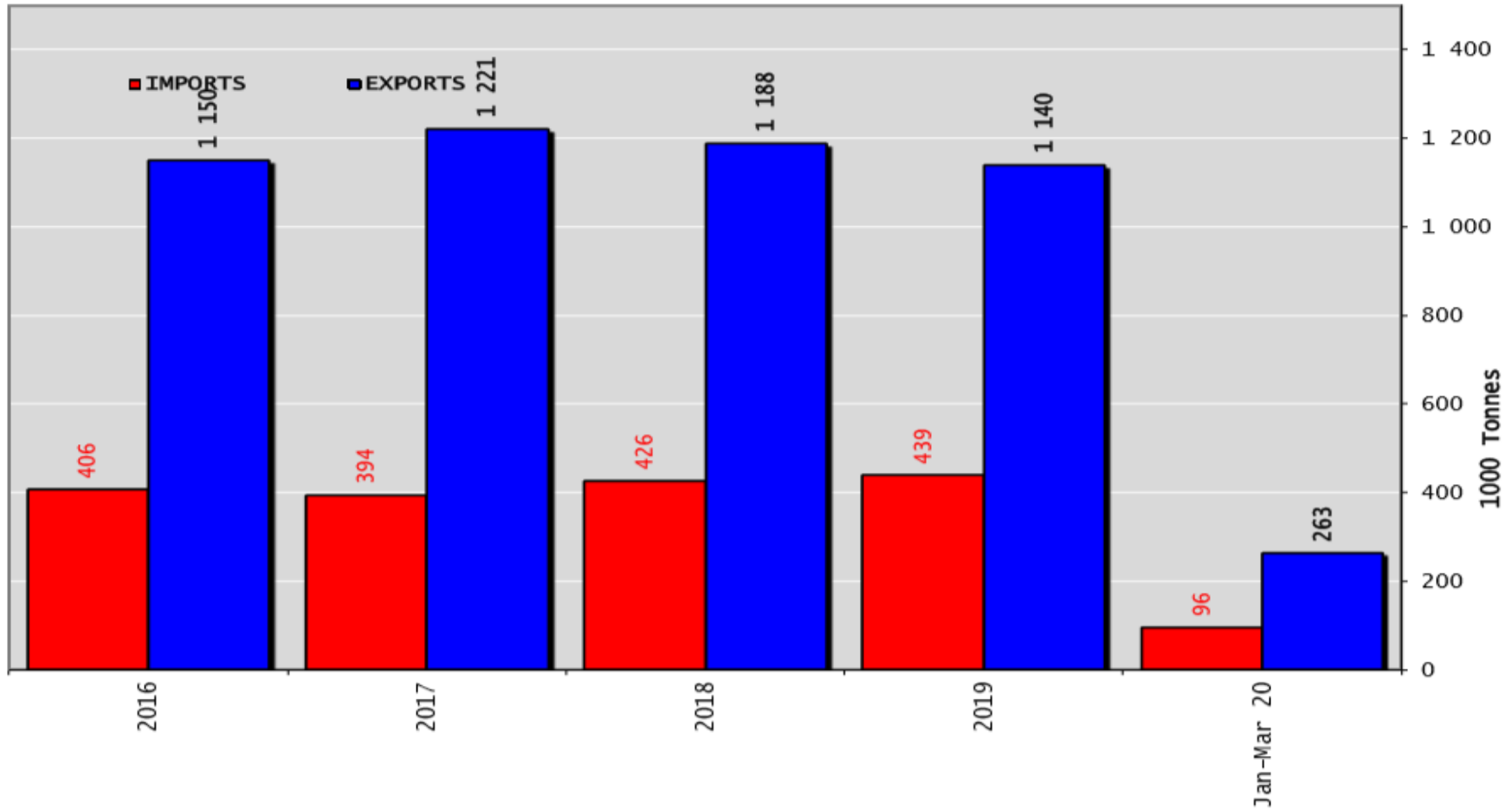
AB Sığır Eti ve Canlı Hayvan İthalatları (2): Ticaret Verileri (COMEXT)



AB Sığır Eti Ürünleri İthalatları

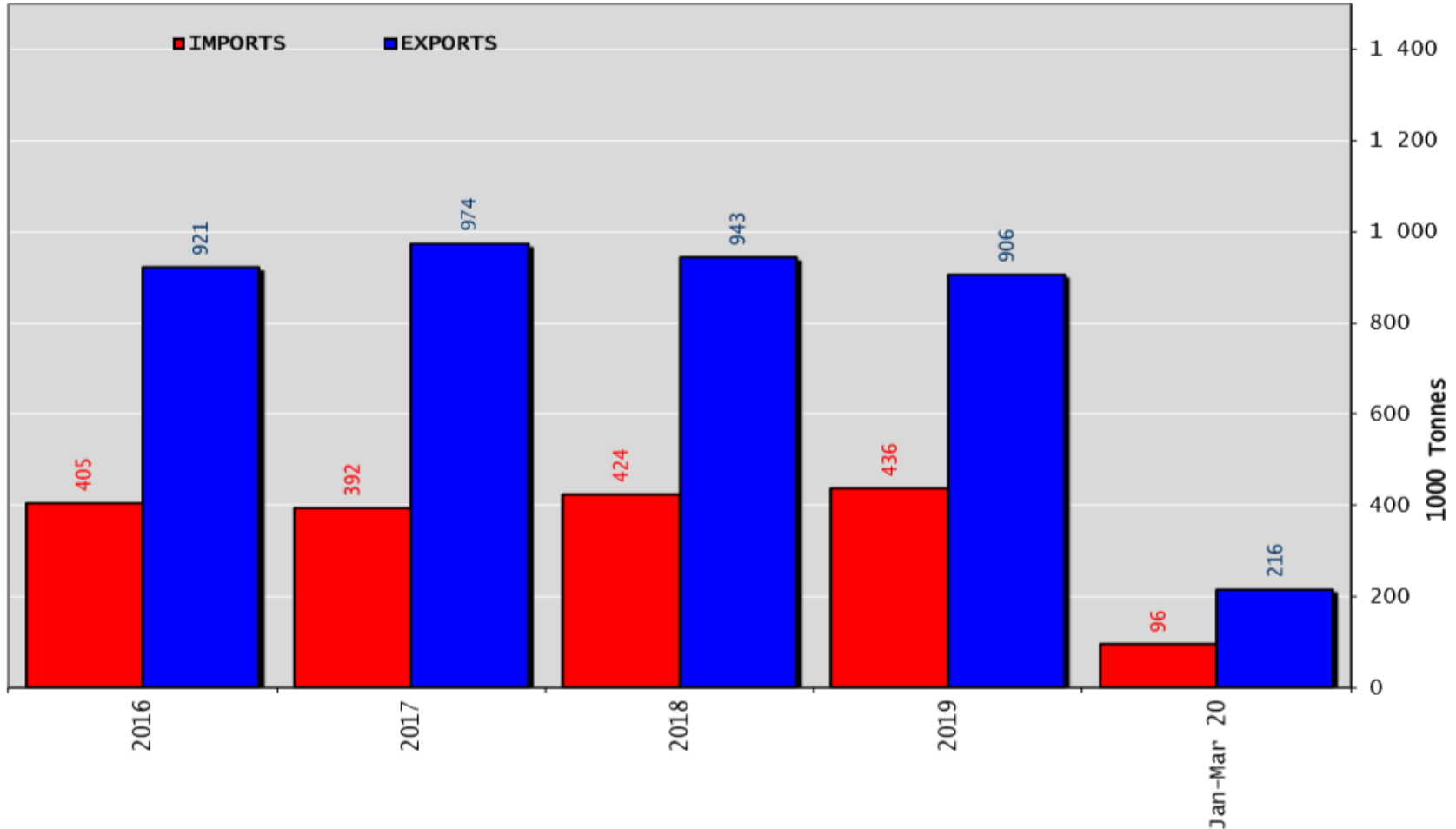


Siğır Eti Ürünleri ve Canlı Hayvan Ticaret Dengesi (Ton)

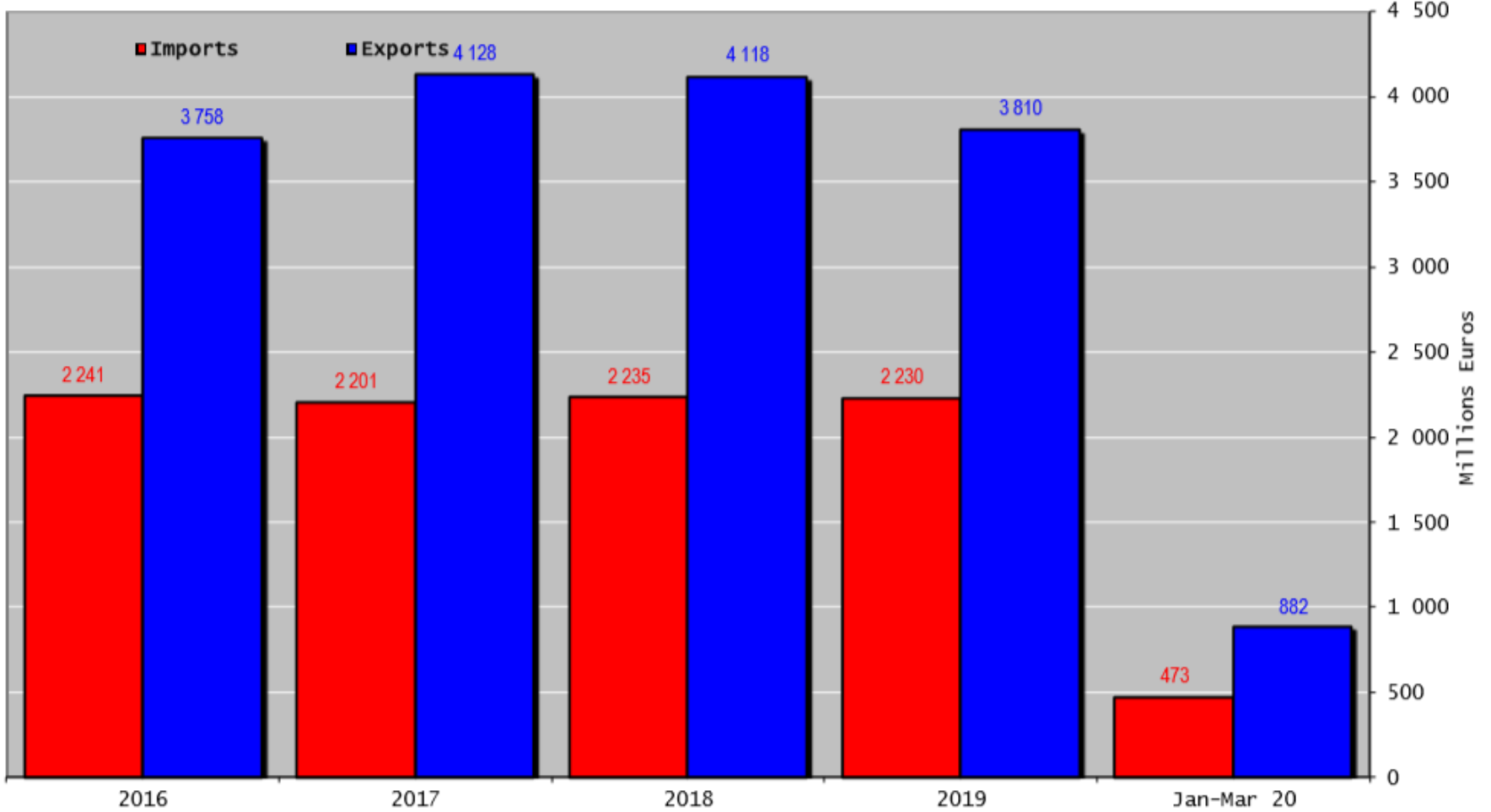




Siğır Eti Ürünleri Ticaret Dengesi (Canlı hayvanlar hariç) (Ton)

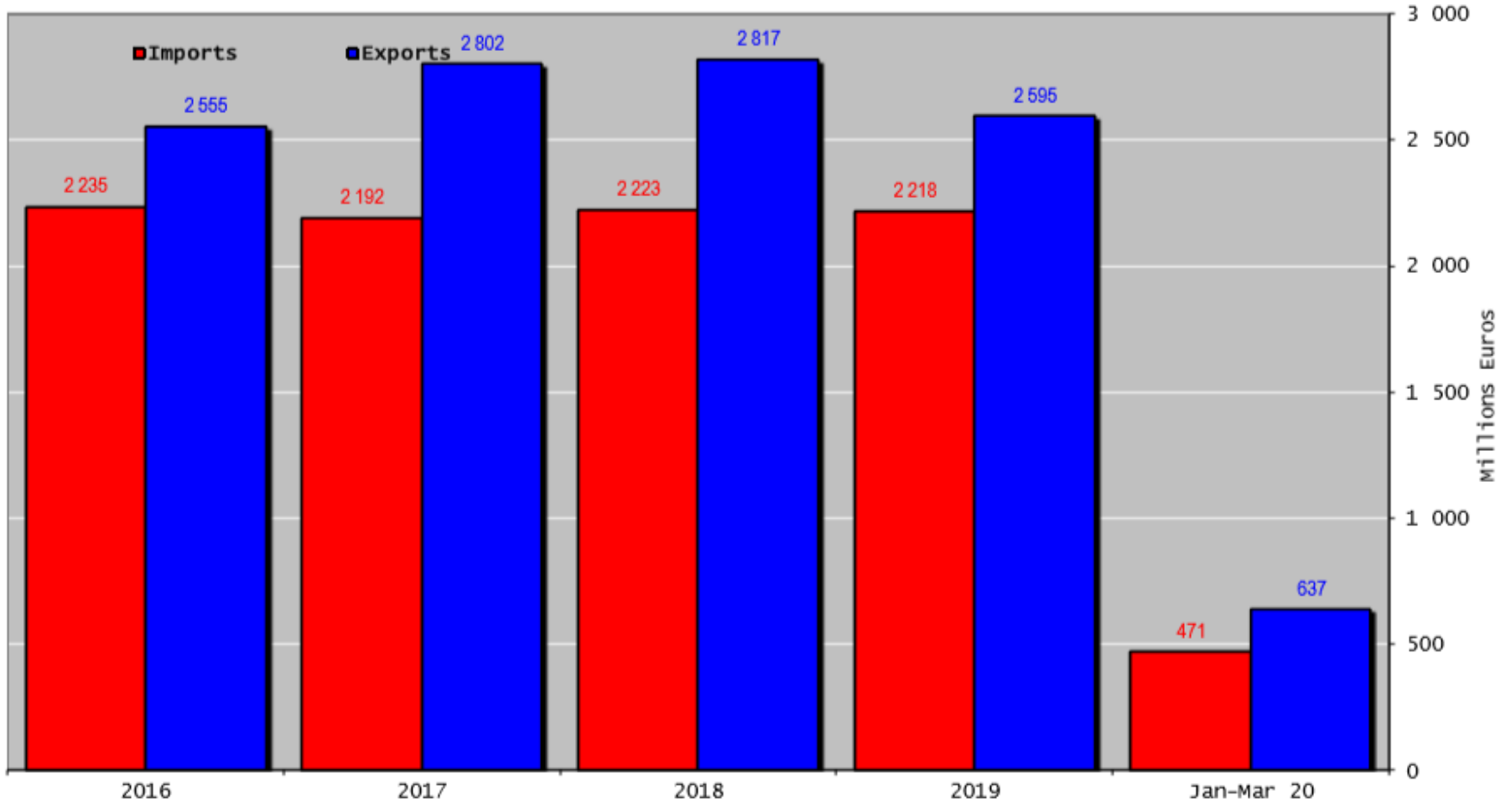


Siğir Eti Ürünleri ve Canlı Hayvan Ticaret Dengesi (Milyon Euro)

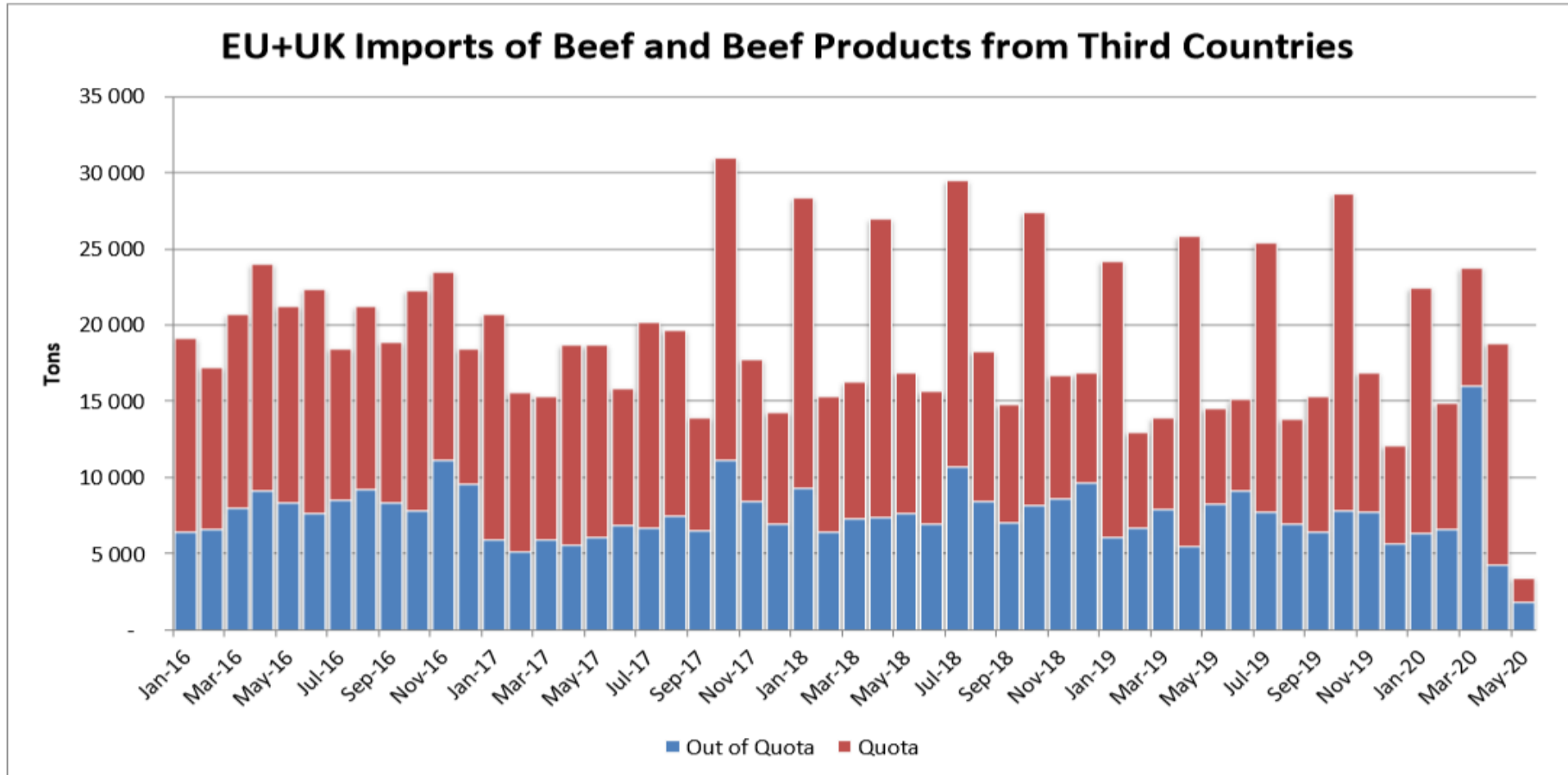




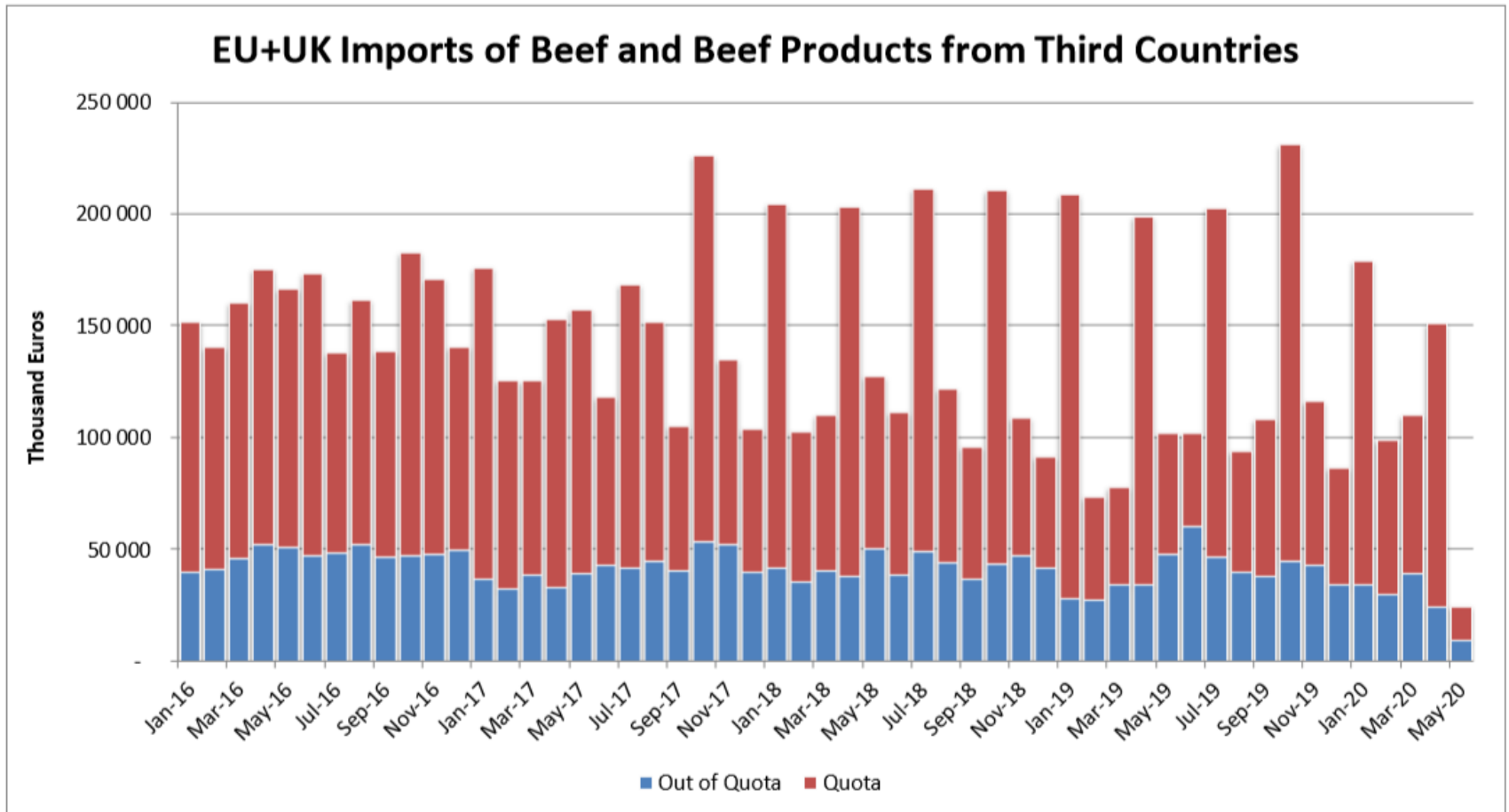
AB Sığır Eti Ürünleri Ticareti (Canlı Hayvanlar Hariç) (Milyon Euro)



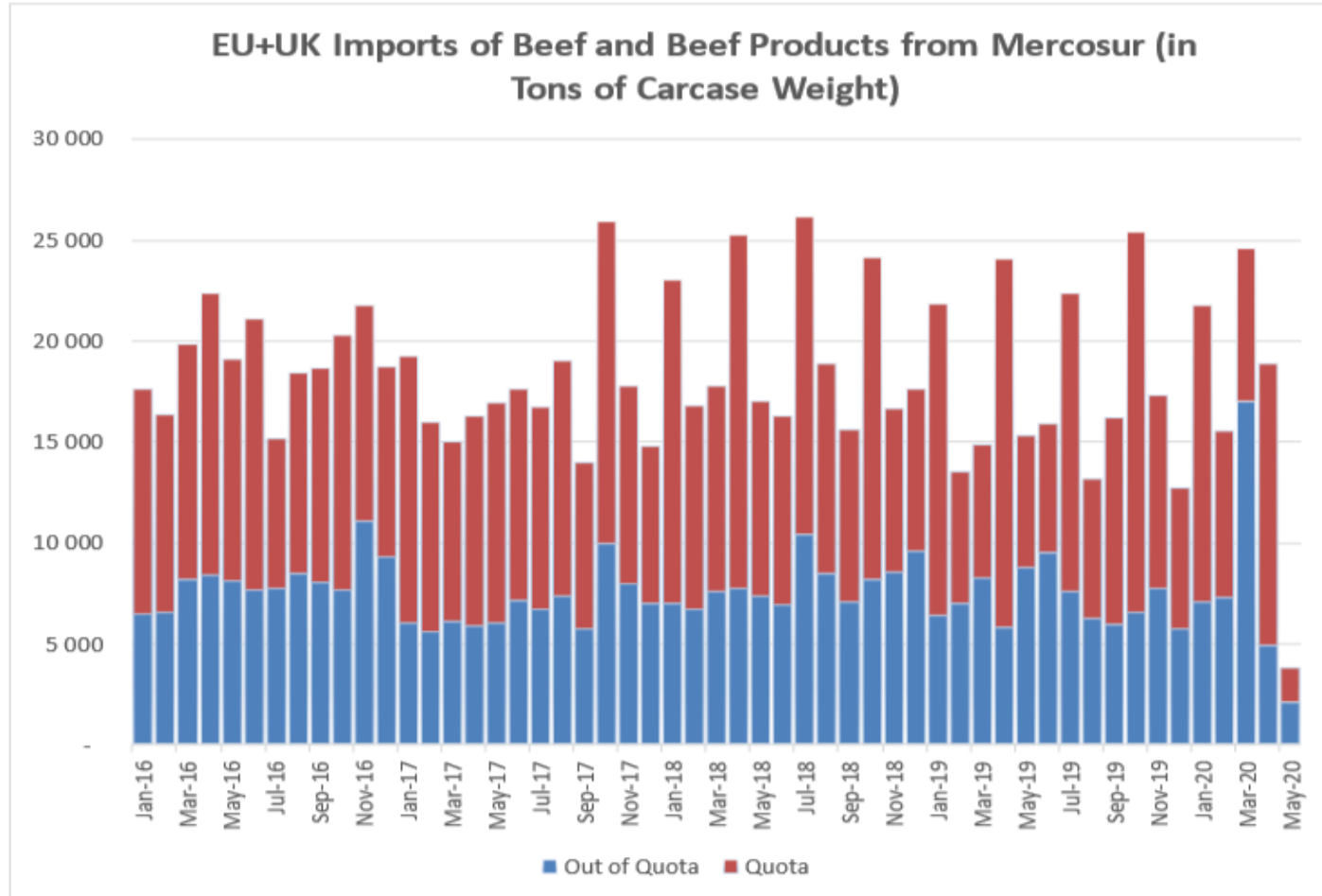
Üçüncü Ülkelerden AB ve Birleşik Krallık Sığır ve Sığır Eti Ürünleri İthalatı (Ton)



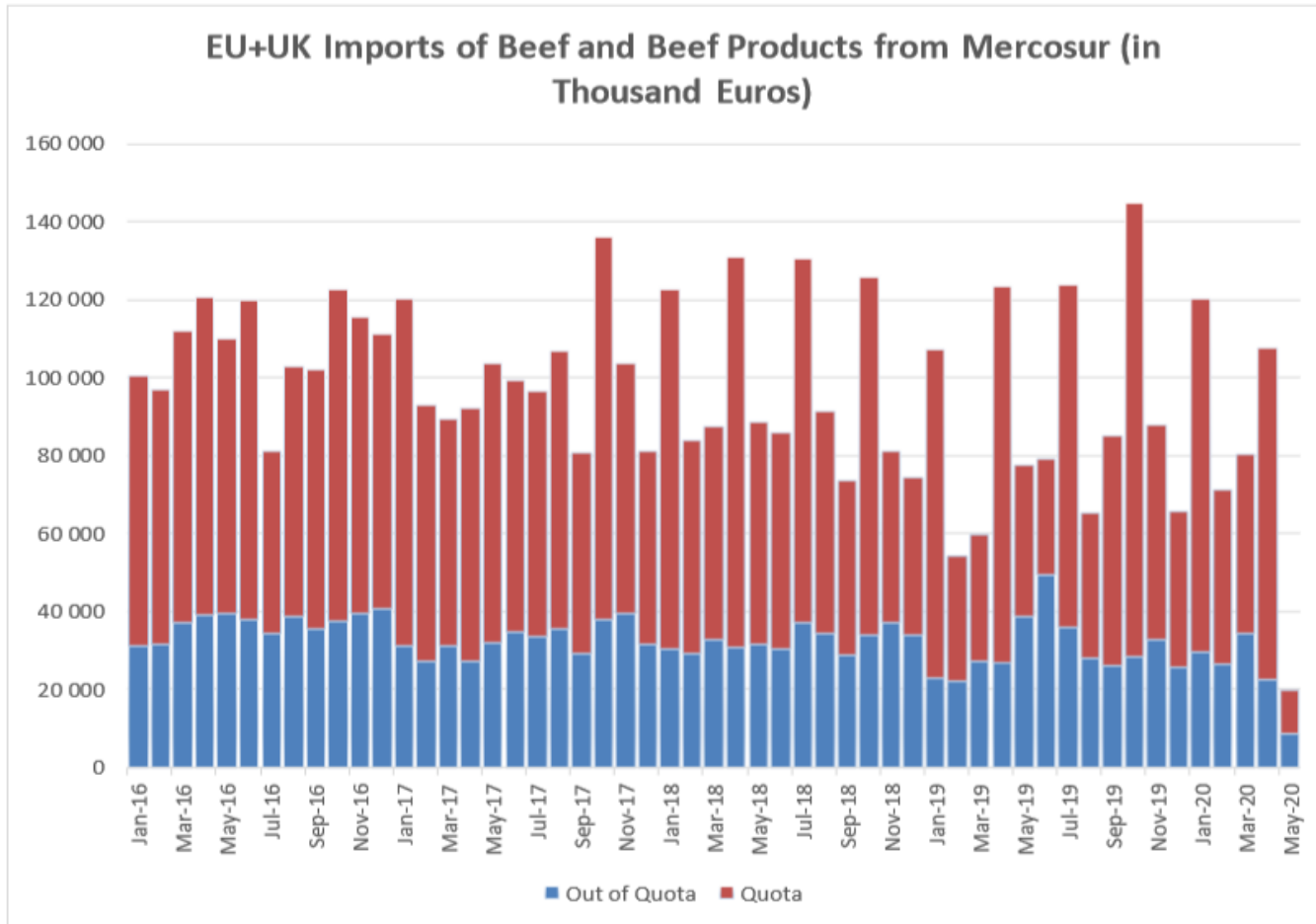
Üçüncü Ülkelerden AB ve Birleşik Krallık Sığır ve Sığır Eti Ürünleri İthalatı (Bin Euro)



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



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



YÜKSEK KALİTE SİĞİR ETİ İTHALAT KOTALARI



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Hilton Quota

Regulation (EU) N° 593/2013

	Quantity allocated (Tons)	2017/2018		2018/2019		2019/2020*	
		Use		Use		Use	
09.4001 Australia	2 250						
09.4004 Argentina	200	14.67	7.34%	11.05	5.53%	8.34	4.17%
09.4450 Argentina	29 500	28 091.29	95.22%	29 491.35	99.97%	25 572.28	86.69%
09.4451 Australia	7 150	5 333.48	74.59%	4 942.02	69.12%	2 934.48	41.04%
09.4452 Uruguay	6 376	6 363.24	99.80%	6 363.76	99.81%	4 299.24	67.43%
09.4453 Brazil	10 000	5 057.27	50.57%	4 147.19	41.47%	2 826.59	28.27%
09.4454 New Zealand	1 300	1 122.25	86.33%	980.60	75.43%	847.56	65.20%
09.4002 Canada/US	11 500	2 351.37	20.45%	3 883.04	33.77%	2 646.01	23.01%
09.4455 Paraguay	1 000	962.21	96.22%	935.41	93.54%	636.86	63.69%
Total Beef	66 826	49 281.11	73.75%	50 743.37	75.93%	10 810.50	16.18%
Total Buffalo	2 450	14.67	0.60%	11.05	0.45%	-	0.00%
Total	69 276	49 295.78	71.16%	50 754.42	73.26%	10 810.50	15.60%

* up to 30/04/2020

YÜKSEK KALİTE SİĞİR ETİ İTHALAT KOTALARI



Quota erga omnes

European Regulation (EU) No 481/2012

	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%	

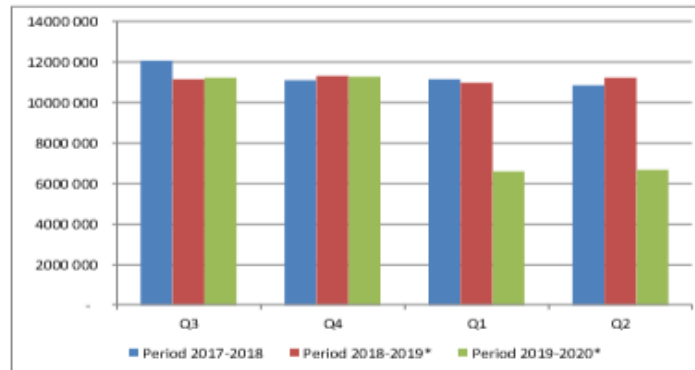
	2016-Q3	2016-Q4	2017-Q1	2017-Q2	TOTAL
Period 2016-2017	12 059 567	12 062 828	12 015 258	12 095 591	48 233 243
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	100.00%	100.00%	99.71%	100.00%	100.00%
Available after transfer	12 050 000	12 040 433	12 027 606	12 062 348	
	100.00%	100.00%	99.90%	100.00%	

	2017-Q3	2017-Q4	2018-Q1	2018-Q2	TOTAL
Period 2017-2018	12 051 815	11 102 282	11 161 480	10 859 149	45 174 725
Available	12 050 000	11 161 000	11 250 000	11 250 000	45 711 000
Use	100.00%	99.47%	99.21%	96.53%	98.83%
Available after transfer	12 050 000	11 159 185	11 308 718	11 338 520	
	100.00%	99.49%	98.70%	95.77%	

	2018-Q3	2018-Q4	2019-Q1	2019-Q2	TOTAL
Period 2018-2019*	11 164 832	11 319 134	10 972 635	11 255 802	44 712 403
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.24%	100.00%	97.53%	100.00%	99.36%
Available after transfer	11 250 000	11 335 168	11 180 866	11 527 365	
	99.24%	99.86%	98.14%	97.64%	

	2019-Q3	2019-Q4	2020-Q1	2020-Q2	TOTAL
Period 2019-2020*	11 246 417	11 261 455	6 595 247	6 686 892	35 790 012
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.97%	100.00%	58.62%	59.44%	79.53%
Available after transfer	11 250 000	11 250 000	11 250 000	11 250 000	
	99.97%	100.00%	58.62%	59.44%	

* Until 14.05.2020



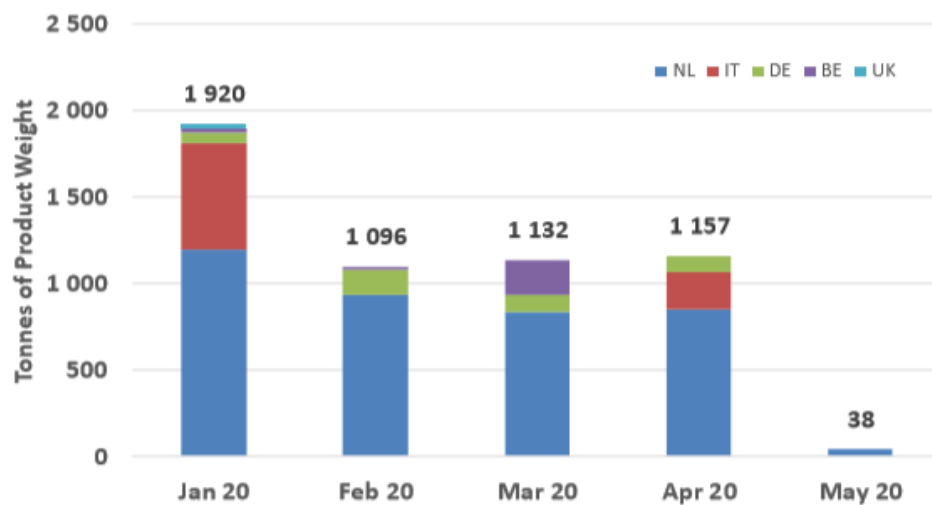
YÜKSEK KALİTE SİĞİR ETİ İTHALAT KOTALARI



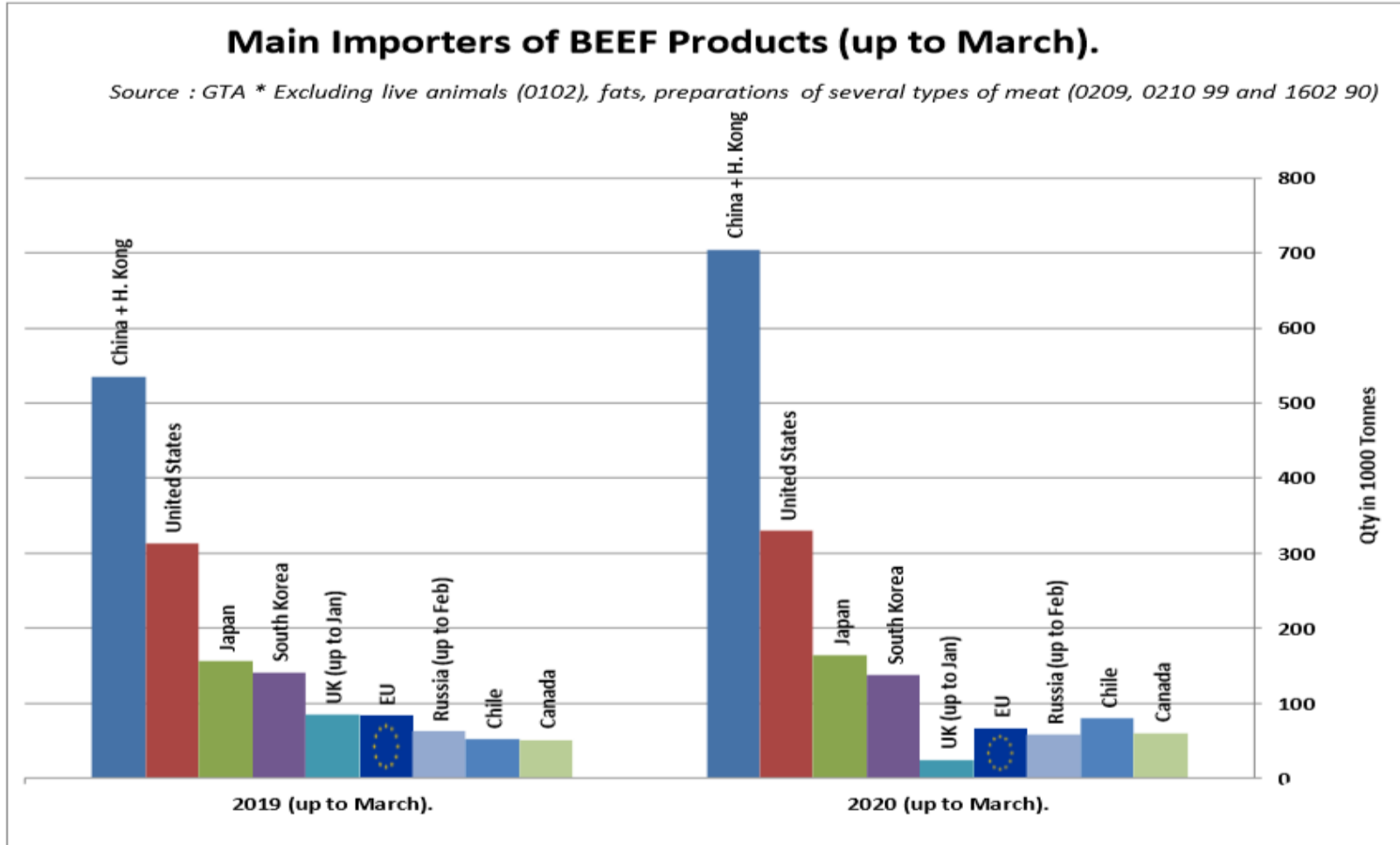
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Origin	GATT 2019-2020				Total
	2019-Q3	2019-Q4	2020-Q1	2020-Q2	
NL			2 957	717	3 674
IT			614	82	697
DE			313	29	342
BE			241	-	241
UK			23	-	23
Total import within Quota *			4 125	828	4 953
Available			4 625	4 625	9 250
Use			89.19%	17.90%	53.55%
After transfer			4 625	5 125	

EU + UK use of Import Quota 09-2203

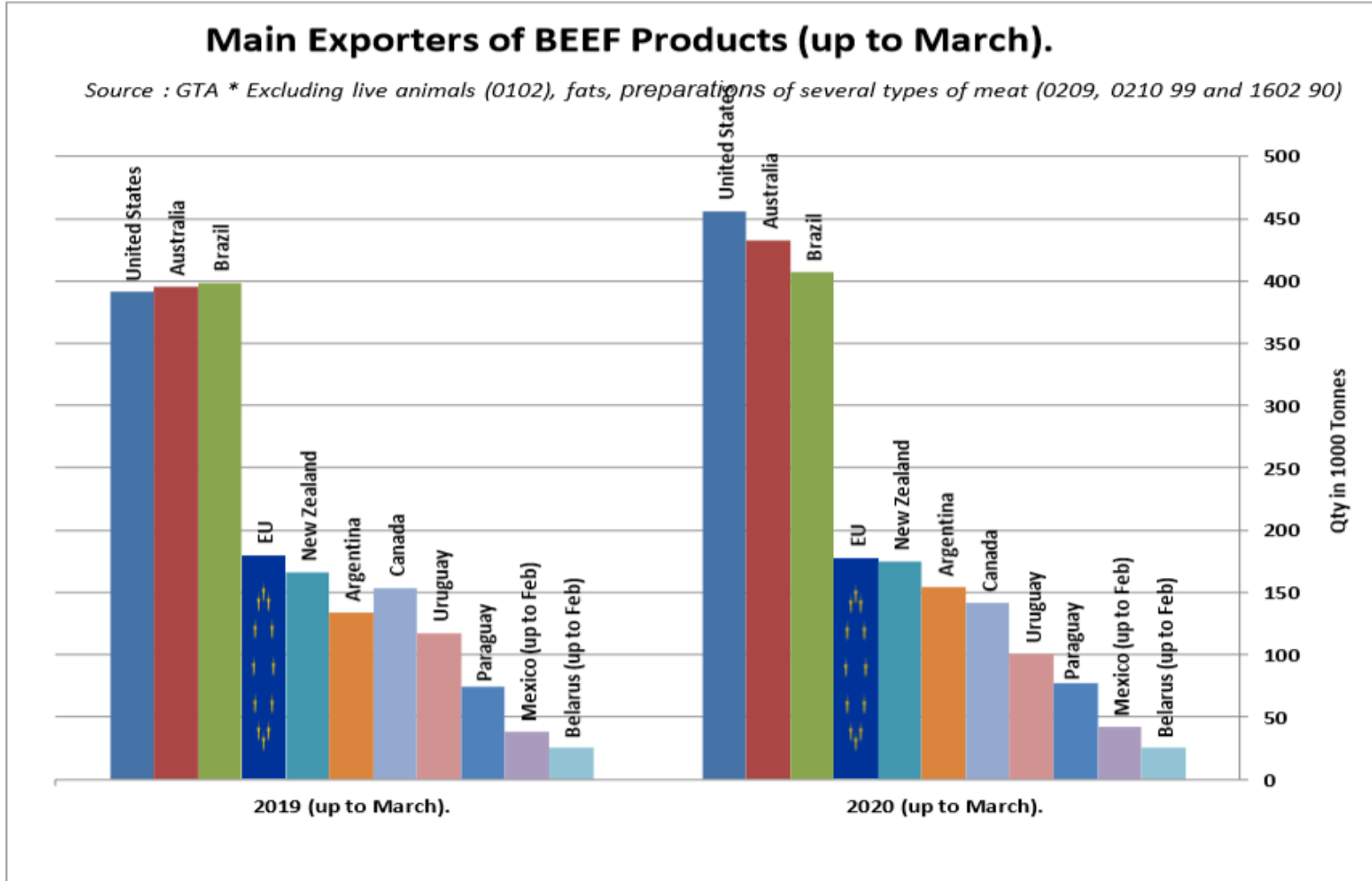


SIĞIR ETİ ÜRÜNLERİNİN NET İTHALATÇILARI (MART AYINA KADAR)





SIĞIR ETİ ÜRÜNLERİNİN NET İHRACATÇILARI (MART AYINA KADAR)

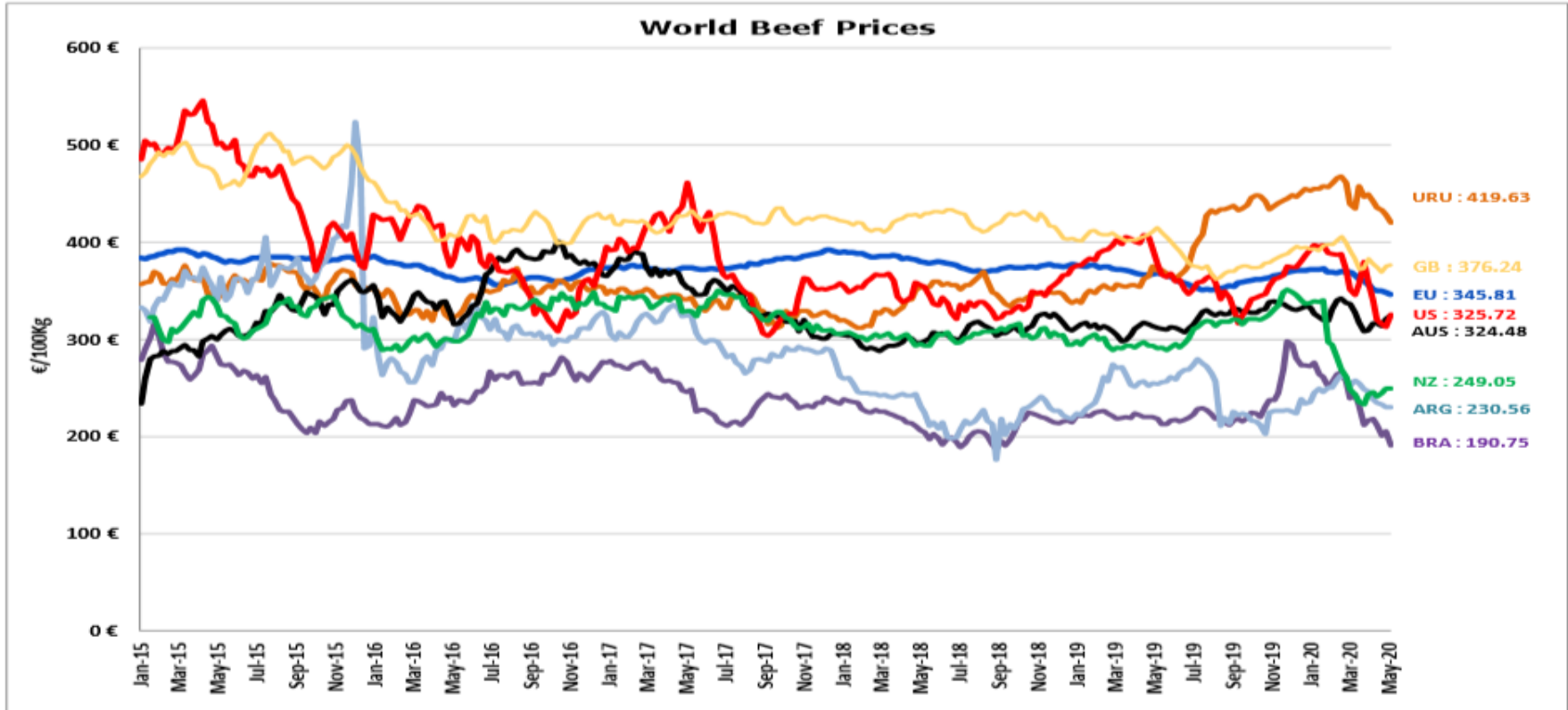


DÜNYA SIĞIR ETİ PAZARI



European
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Dünya Sığır Fiyatları AB, ABD, AVUSTURYA, YENİ ZELANDA



- 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
BR <http://www.pecuaria.com.br/cotacoes.php>
NZ http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_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>