



BEEF & VEAL MARKET SITUATION*



Beef CMO 18 March 2021

* Trade excluded

LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION TOTAL BOVINE

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2020 2019	BOVINE < 1 Year				%Var 2020 2019	BOVINE 1-2 Year				%Var 2020 2019	BOVINE > 2 Year				%Var 2020 2019
	2017	2018	2019	2020		2017	2018	2019	2020		2017	2018	2019	2020		2017	2018	2019	2020	
BE	2 386	2 398	2 373	2 334	-1.6%	700	724	722	711	-1.5%	484	464	464	461	-0.6%	1 202	1 210	1 188	1 163	-2.1%
BG	553	542	527	589	+11.6%	110	108	100	112	+11.9%	57	59	58	71	+22.0%	386	375	369	406	+9.9%
CZ	1 366	1 365	1 367	1 340	-2.0%	407	404	411	405	-1.5%	299	304	299	295	-1.2%	660	657	657	640	-2.6%
DK	1 558	1 530	1 500	1 500	idem	541	534	522	524	+0.4%	294	284	280	279	-0.4%	723	712	698	697	-0.1%
DE	12 281	11 949	11 640	11 302	-2.9%	3 704	3 584	3 485	3 405	-2.3%	2 904	2 829	2 751	2 639	-4.1%	5 673	5 536	5 403	5 258	-2.7%
EE	251	252	254	253	-0.3%	70	71	71	72	+1.6%	49	49	50	50	-0.6%	132	132	133	132	-1.1%
IE	6 674	6 593	6 560	6 529	-0.5%	2 087	2 000	1 962	2 057	+4.8%	1 792	1 790	1 741	1 708	-1.9%	2 795	2 804	2 856	2 765	-3.2%
EL	556	542	530	539	+1.7%	151	141	157	154	-1.9%	101	96	91	90	-1.1%	303	305	283	295	+4.2%
ES	6 466	6 511	6 600	6 636	+0.5%	2 492	2 494	2 529	2 541	+0.5%	822	847	857	853	-0.5%	3 151	3 170	3 214	3 242	+0.9%
FR	18 954	18 613	18 173	17 591	-3.2%	5 271	5 304	5 125	4 865	-5.1%	3 381	3 180	3 183	3 064	-3.8%	10 301	10 129	9 865	9 663	-2.0%
HR	451	414	420	423	+0.7%	156	153	151	146	-3.3%	100	96	107	111	+3.7%	195	165	162	166	+2.5%
IT	6 350	6 311	6 377	6 400	+0.4%	1 738	1 703	1 759	1 774	+0.8%	1 501	1 538	1 588	1 595	+0.5%	3 111	3 071	3 030	3 031	+0.0%
CY	67	71	74	78	+4.8%	23	24	25	25	+3.5%	11	12	12	12	+2.8%	33	35	38	40	+6.2%
LV	406	395	395	399	+0.9%	108	106	108	112	+3.0%	70	65	65	65	+1.2%	228	225	222	222	-0.2%
LT	677	654	635	630	-0.8%	180	173	167	169	+1.2%	135	133	132	128	-2.5%	362	348	336	332	-1.1%
LU	198	194	192	191	-0.7%	50	50	50	50	+0.2%	44	42	41	41	-1.1%	103	103	101	100	-1.1%
HU	870	885	909	933	+2.6%	243	251	258	266	+3.1%	179	182	193	195	+1.0%	448	451	458	472	+3.1%
MT	14	14	14	14	+0.1%	4	4	4	4	+5.3%	3	3	3	3	-8.4%	7	7	7	7	+0.9%
NL	4 030	3 690	3 721	3 691	-0.8%	1 594	1 510	1 528	1 510	-1.2%	575	465	440	465	+5.7%	1 860	1 715	1 752	1 716	-2.1%
AT	1 943	1 913	1 880	1 855	-1.3%	624	618	605	599	-1.1%	439	428	426	414	-2.8%	881	866	848	842	-0.6%
PL	6 036	6 183	6 262	6 279	+0.3%	1 713	1 709	1 748	1 735	-0.7%	1 669	1 732	1 757	1 800	+2.5%	2 654	2 742	2 758	2 744	-0.5%
PT	1 670	1 632	1 675	1 691	+1.0%	515	497	531	526	-1.1%	256	236	240	257	+6.9%	900	899	903	909	+0.6%
RO	2 011	1 977	1 923	1 894	-1.5%	432	418	400	394	-1.7%	248	241	223	220	-1.3%	1 330	1 318	1 300	1 280	-1.5%
SI	480	477	483	485	+0.5%	153	153	151	153	+1.3%	128	128	136	133	-1.7%	198	196	197	199	+1.4%
SK	440	439	432	442	+2.2%	125	123	122	126	+3.0%	84	83	83	87	+4.1%	231	232	227	229	+1.0%
FI	875	859	841	835	-0.6%	299	296	287	292	+1.5%	213	210	205	199	-2.6%	363	354	349	344	-1.3%
SE	1 449	1 435	1 405	1 391	-1.0%	474	468	453	464	+2.5%	342	343	339	323	-4.6%	633	625	613	603	-1.6%
EU	79 010	77 840	77 161	76 245	-1.2%	23 964	23 619	23 431	23 187	-1.0%	16 182	15 838	15 764	15 559	-1.3%	38 863	38 382	37 966	37 499	-1.2%
UK	9 787	9 610	9 459			2 956	2 869	2 860			2 413	2 405	2 335			4 417	4 336	4 264		

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2019 AND 2020

LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION COWS

Dec 1000 Hd	TOTAL COWS				%Var 2020 2019	DAIRY COWS				%Var 2020 2019	OTHER COWS				%Var 2020 2019
	2017	2018	2019	2020		2017	2018	2019	2020		2017	2018	2019	2020	
BE	938	942	939	922	-1.8%	519	529	538	541	+0.6%	419	412	401	381	-5.0%
BG	357	351	343	381	+11.2%	261	244	227	242	+6.8%	97	107	116	139	+20.0%
CZ	571	570	570	560	-1.8%	365	359	361	357	-1.2%	206	212	209	203	-2.9%
DK	664	655	645	646	+0.2%	575	570	563	565	+0.4%	89	85	83	80	-3.6%
DE	4 859	4 751	4 651	4 548	-2.2%	4 199	4 101	4 012	3 921	-2.2%	660	650	640	626	-2.1%
EE	115	116	116	116	-0.4%	86	85	85	84	-0.8%	29	30	31	32	+0.6%
IE	2 362	2 351	2 383	2 379	-0.2%	1 343	1 369	1 426	1 456	+2.1%	1 018	982	957	923	-3.6%
EL	262	269	242	258	+6.6%	97	95	86	86	idem	165	174	156	171	+9.6%
ES	2 822	2 819	2 881	2 909	+1.0%	823	817	813	811	-0.3%	1 998	2 002	2 068	2 099	+1.5%
FR	7 751	7 650	7 505	7 432	-1.0%	3 597	3 554	3 491	3 434	-1.6%	4 154	4 095	4 014	3 998	-0.4%
HR	161	146	142	144	+1.4%	139	136	130	129	-0.8%	22	10	12	15	+25.0%
IT	2 338	2 263	2 237	2 243	+0.3%	2 040	1 939	1 876	1 871	-0.2%	298	324	362	372	+2.8%
CY	30	32	35	37	+4.8%	30	32	35	37	+4.8%	0	0	0	0	idem
LV	199	196	195	196	+0.6%	150	144	138	136	-1.7%	49	52	56	60	+6.5%
LT	323	312	299	295	-1.4%	273	256	241	233	-3.3%	50	56	58	62	+6.4%
LU	78	78	79	78	-1.2%	52	53	54	54	+0.1%	26	25	25	24	-4.1%
HU	395	403	412	414	+0.5%	244	239	243	226	-7.0%	151	164	169	188	+11.2%
MT	6	6	6	6	+1.1%	6	6	6	6	-1.0%	0	0	0	0	+100.0%
NL	1 723	1 594	1 633	1 612	-1.3%	1 665	1 552	1 590	1 569	-1.3%	58	42	43	43	idem
AT	750	733	720	715	-0.6%	543	533	524	525	+0.1%	207	200	195	191	-2.5%
PL	2 341	2 417	2 406	2 391	-0.6%	2 153	2 214	2 167	2 126	-1.9%	188	203	239	266	+10.9%
PT	728	723	731	739	+1.1%	239	235	234	233	-0.6%	490	487	497	507	+1.9%
RO	1 187	1 173	1 166	1 148	-1.5%	1 175	1 158	1 139	1 122	-1.5%	12	15	27	26	-3.0%
SI	169	166	166	167	+0.6%	109	103	101	99	-1.8%	60	64	65	68	+4.3%
SK	195	195	192	191	-0.3%	130	128	126	122	-3.2%	65	67	66	69	+5.3%
FI	329	322	318	316	-0.6%	271	264	259	256	-1.3%	58	58	59	61	+2.3%
SE	522	514	500	499	-0.2%	323	313	301	304	+1.0%	199	201	198	194	-2.1%
EU	32 176	31 749	31 513	31 344	-0.5%	21 409	21 029	20 766	20 545	-1.1%	10 767	10 719	10 748	10 796	+0.4%
UK	3 443	3 382	3 337			1 904	1 879	1 867			1 540	1 503	1 470		

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2019 AND 2020

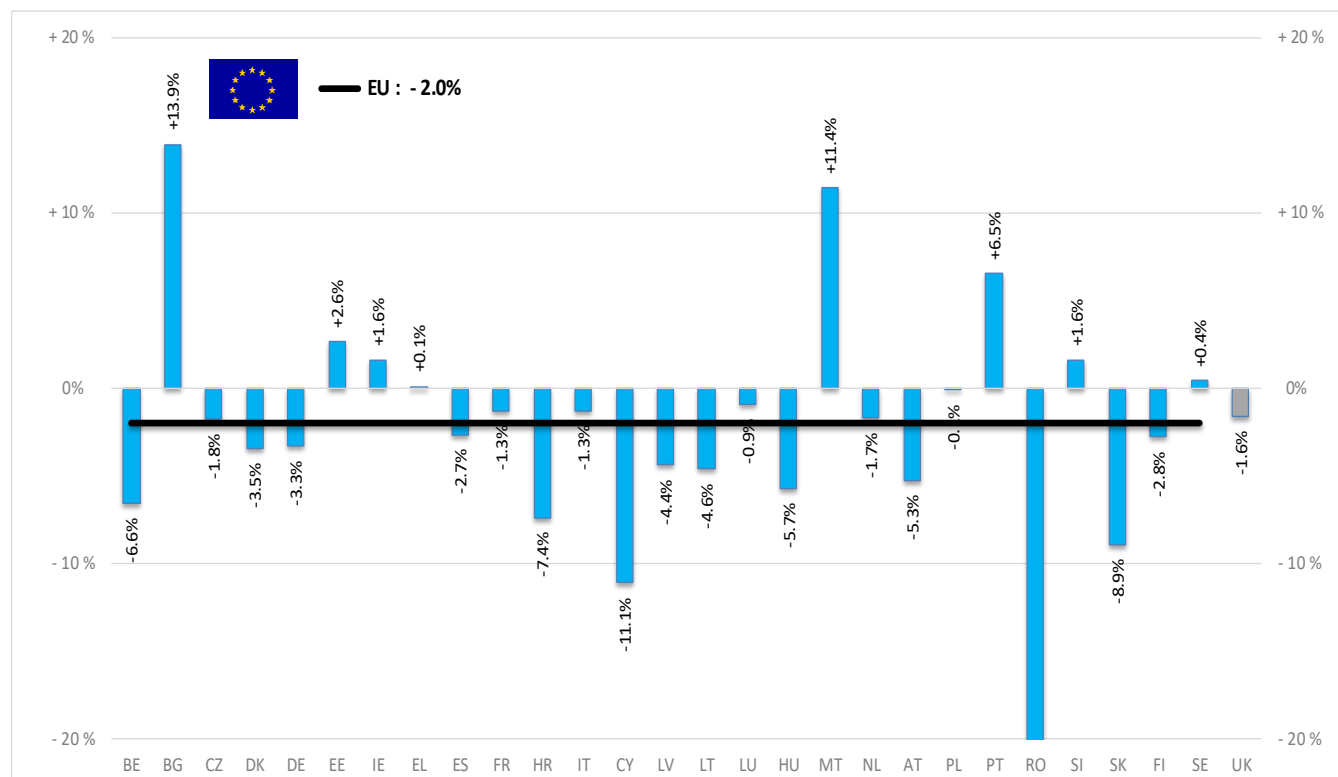
18 March 2021

PRODUCTION

% EVOLUTION HEADS

HEADS	Jan-Dec 20/19	
	EU	EU + UK
Bull	-1.7%	-1.8%
Bullock	+6.8%	+2.9%
Cow	-2.0%	-1.8%
Heifer	+0.7%	+1.1%
Calve	-6.1%	-7.0%
Young cattle	-3.4%	-3.5%
Meat of bovine animals	-2.0%	-2.0%

Estimates for last month of period :



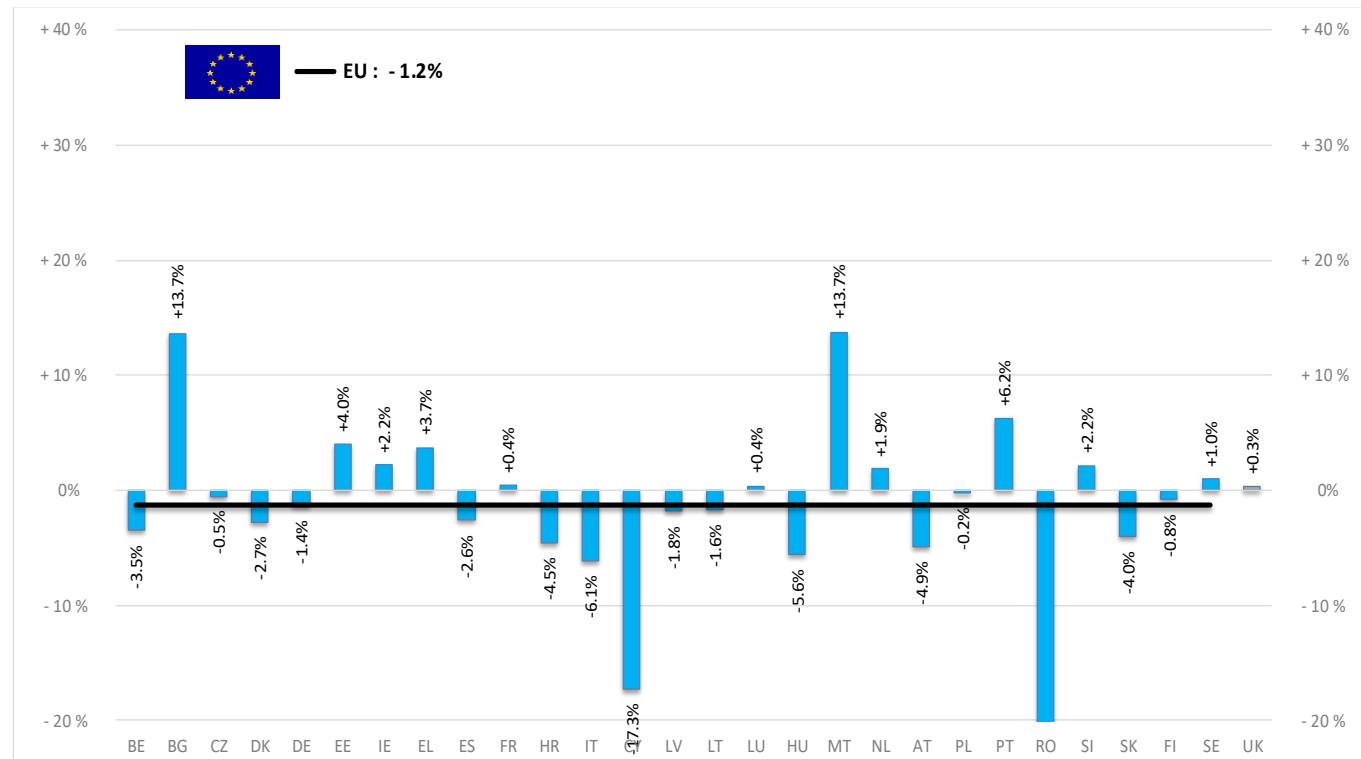
Source : EStat - Newcronos

PRODUCTION

% EVOLUTION TONNES

TONNES	Jan-Dec 20/19	
	EU	EU + UK
Bull	-1.5%	-1.6%
Bullock	+8.5%	+3.5%
Cow	-1.1%	-0.9%
Heifer	-0.2%	+0.5%
Calve	-6.6%	-6.7%
Young cattle	-3.2%	-3.2%
Meat of bovine animals	-1.2%	-1.1%

Estimates for last month of period :

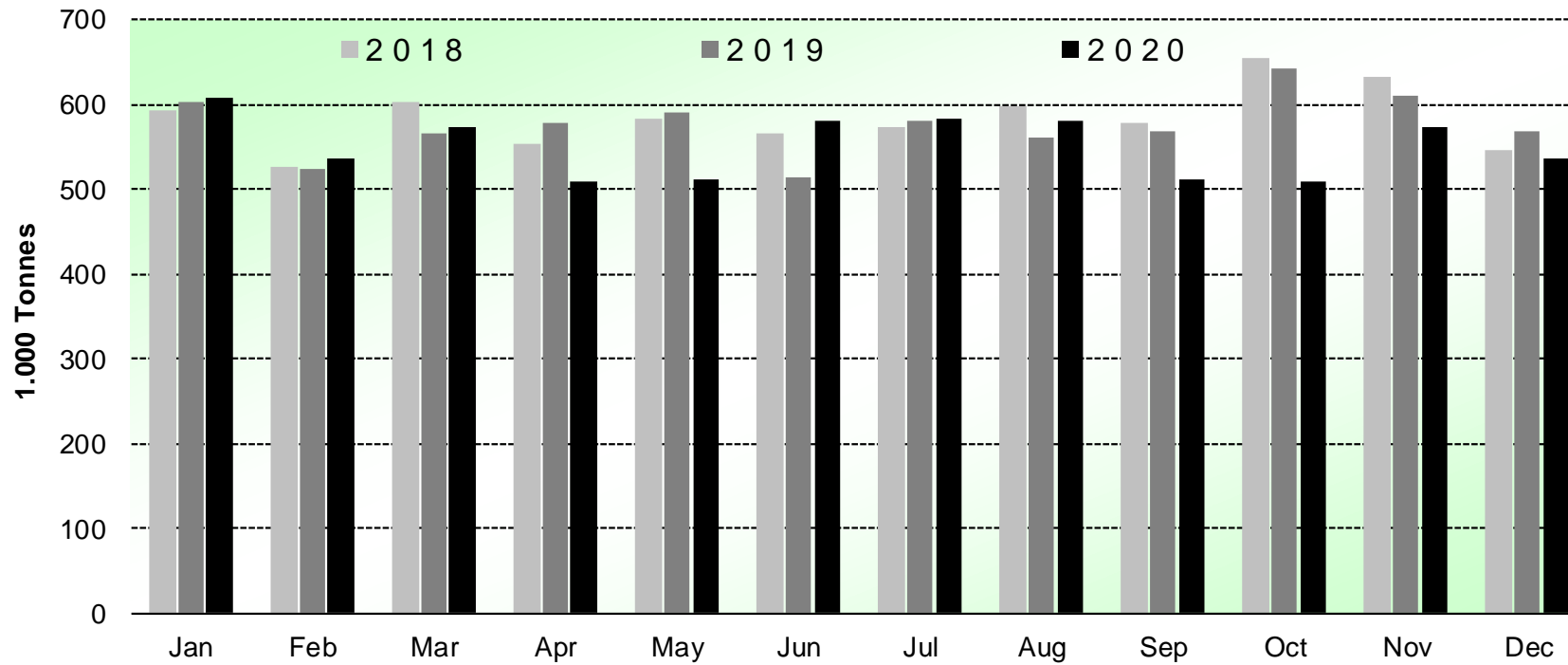


Source : EStat - Newcronos

PRODUCTION

HISTORIC
TONNES

Beef & Veal Production (EU Slaughtering) - Tonnes



Source: EStat-Newcronos

PRICES CARCASSES

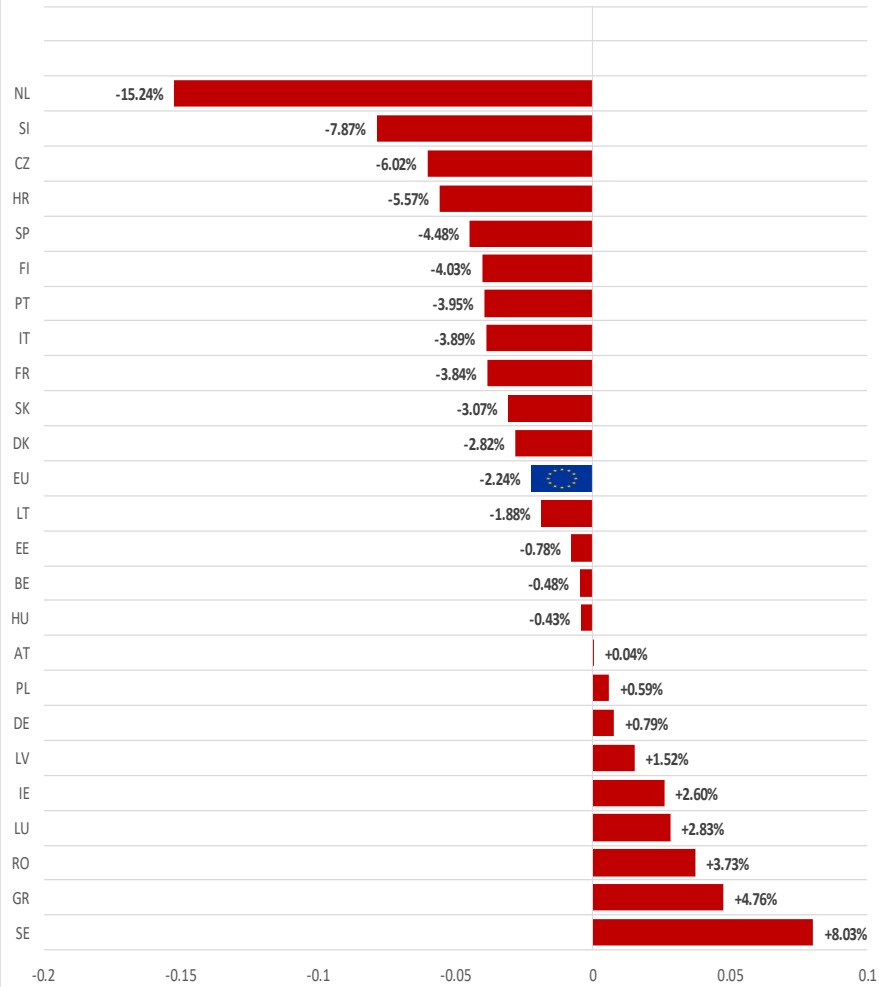
Dashboard

EU Prices week		9	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	368.7	- 0.1%	+ 0.2%	- 0.2%
	Young Bovines (Z)	358.6	- 1.1%	+ 0.2%	- 1.1%
	Young Bulls (A)	369.3	- 0.1%	+ 0.4%	+ 0.7%
	Steers (C)	378.0	+ 1.3%	- 1.4%	+ 2.1%
	Cows (D)	287.9	+ 1.4%	+ 4.7%	+ 2.1%
	Heifers (E)	379.6	+ 0.1%	+ 0.5%	+ 2.2%
Live Animals	Male Calves Dairy Type	66.50	+ 3.7%	+ 3.6%	- 14.7%
	Male Calves Beef Type	190.9	- 1.3%	+ 0.7%	- 3.2%
	Young Store Cattle	2.41	+ 0.3%	+ 0.8%	- 1.2%
	Yearling Male Store Cattle	2.27	- 0.1%	+ 2.7%	+ 0.0%
	Yearling Female Store Cattle	2.48	+ 0.6%	+ 1.9%	+ 5.9%
	Calves slaughtered <8M	495.3	- 1.7%	+ 7.8%	- 6.4%

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

PRICES CARCASSES

EU ACZ R3 Price Comparison between average monthly price March 2020 - February 2021 compared to March 2019 - February 2020

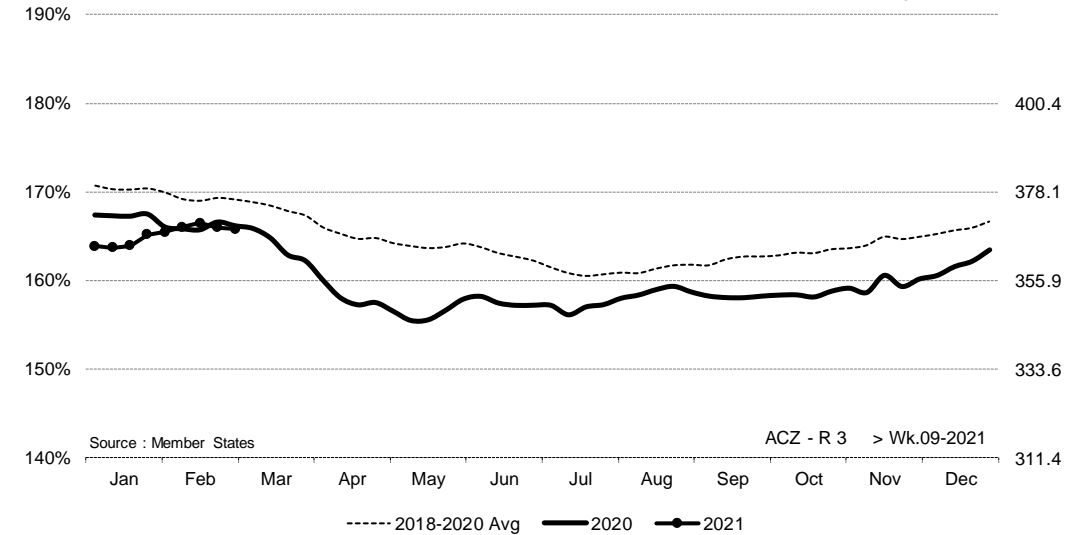


EU EVOLUTION A/C/Z . R3

ACZ - R 3 > Wk.09-2021

% of Reference Price

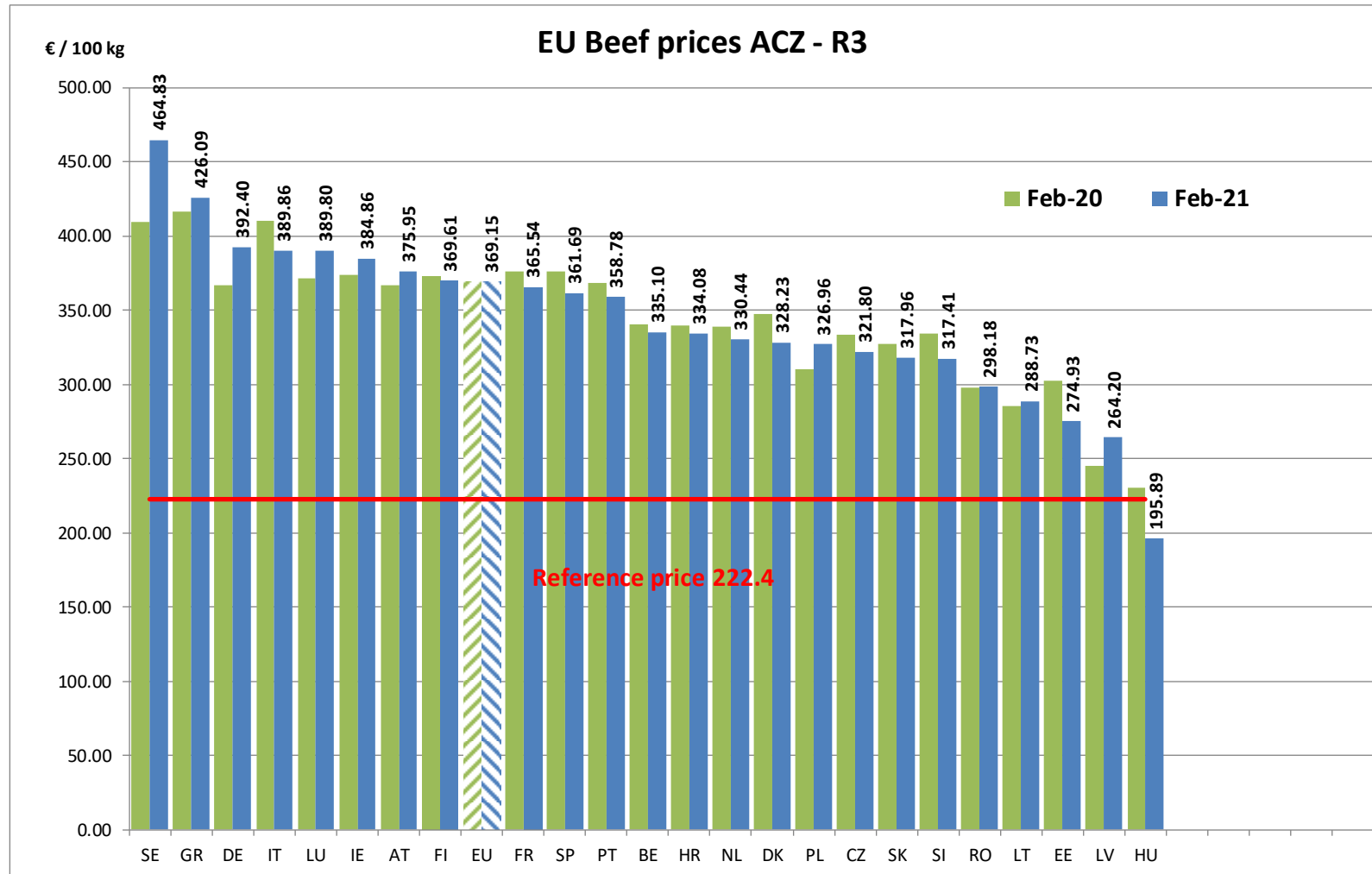
€/100 kg cwe



Price in week 09 :	368.73	Average price in February 2021 :	369.16
% change y/y :	- 0.22%	% change y/y :	- 0.05%
% Ref. Price in wk 9 :	165.8%		

PRICES CARCASSES

EU EVOLUTION A/C/Z.R3

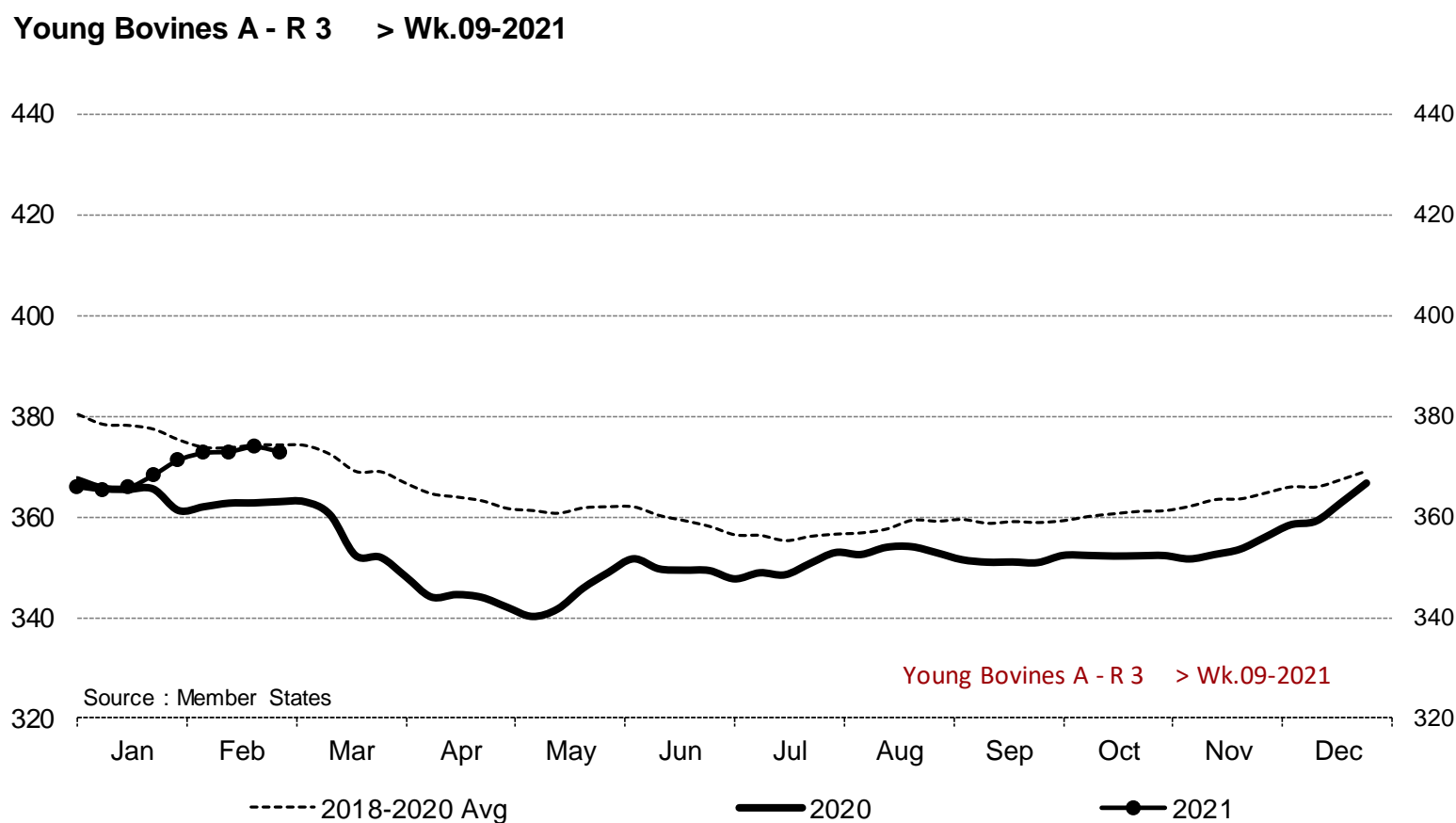


18 March 2021

PRICES CARCASSES

EU EVOLUTION YOUNG BULL – A.R3

Young Bovines A - R 3 > Wk.09-2021

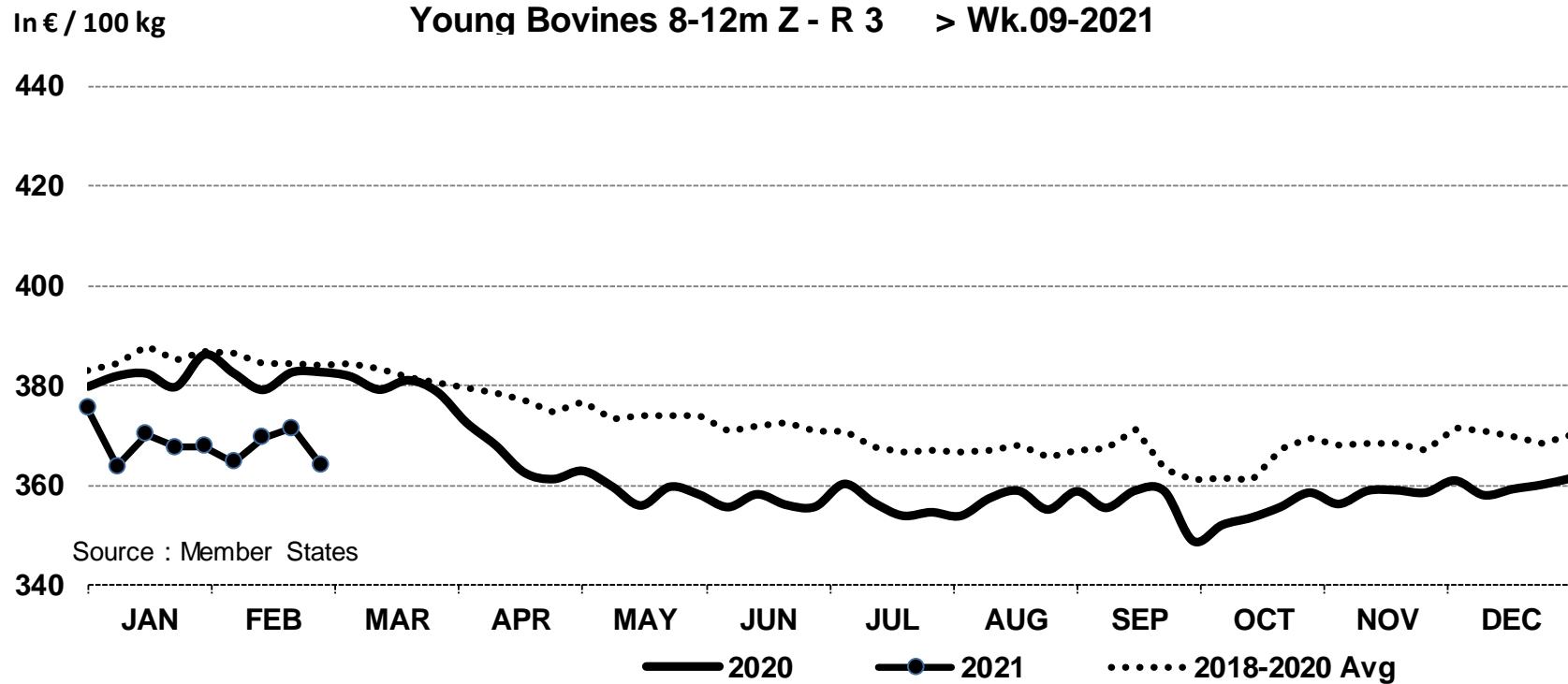


Price in week 09 : **372.75**
% change y/y : **+ 2.7%**

Average price in February 2021 : **372.61**
% change y/y : **+ 2.8%**

PRICES CARCASSES

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



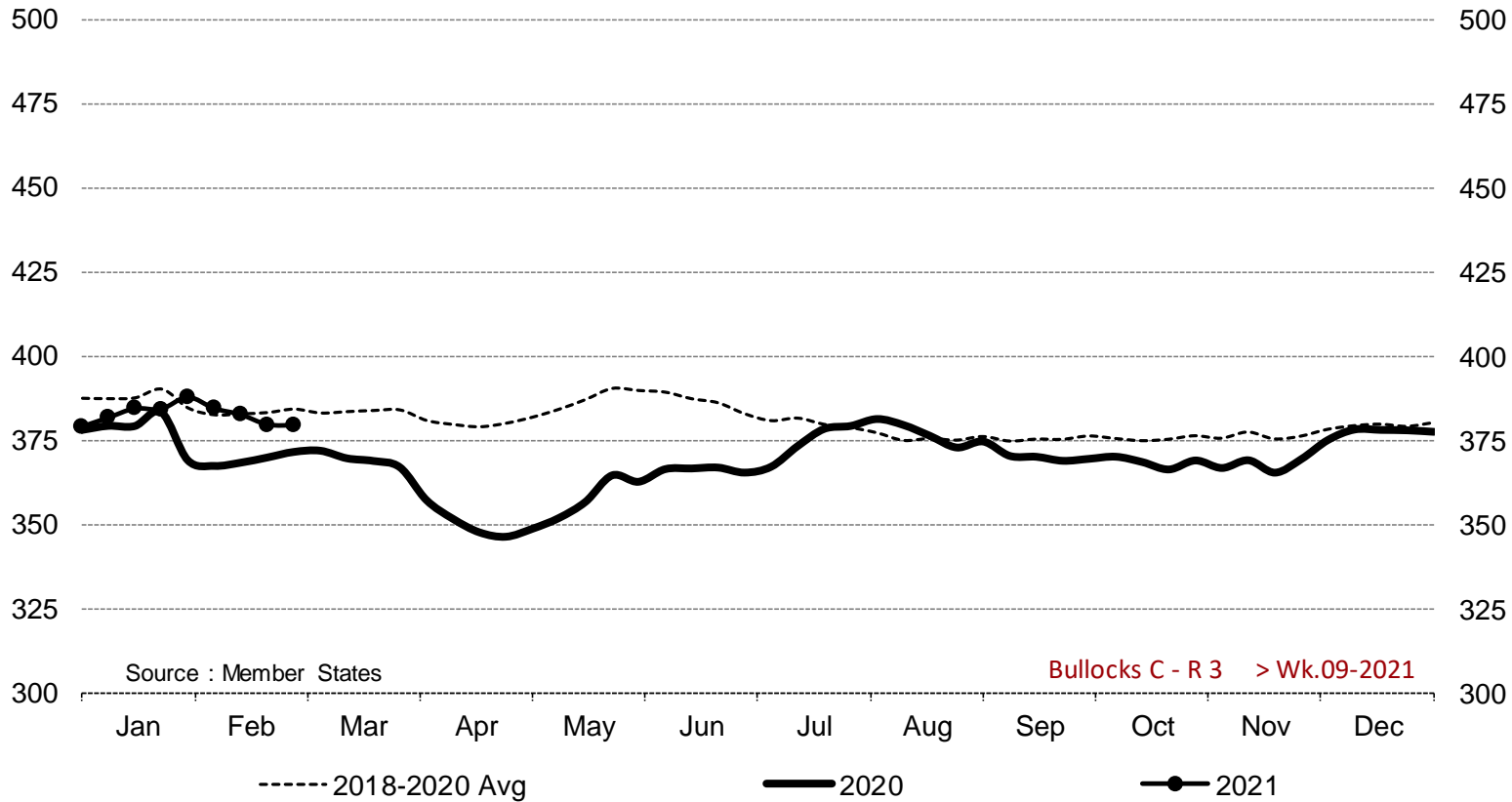
Price in week 09 : **364.13** 04/02/2021
 % change y/y : **- 4.8%**

Average price in February 2021 : **368.35**
 % change y/y : **- 3.6%**

PRICES CARCASSES

E.U. EVOLUTION STEER – C.R3

Bullocks C - R 3 > Wk.09-2021



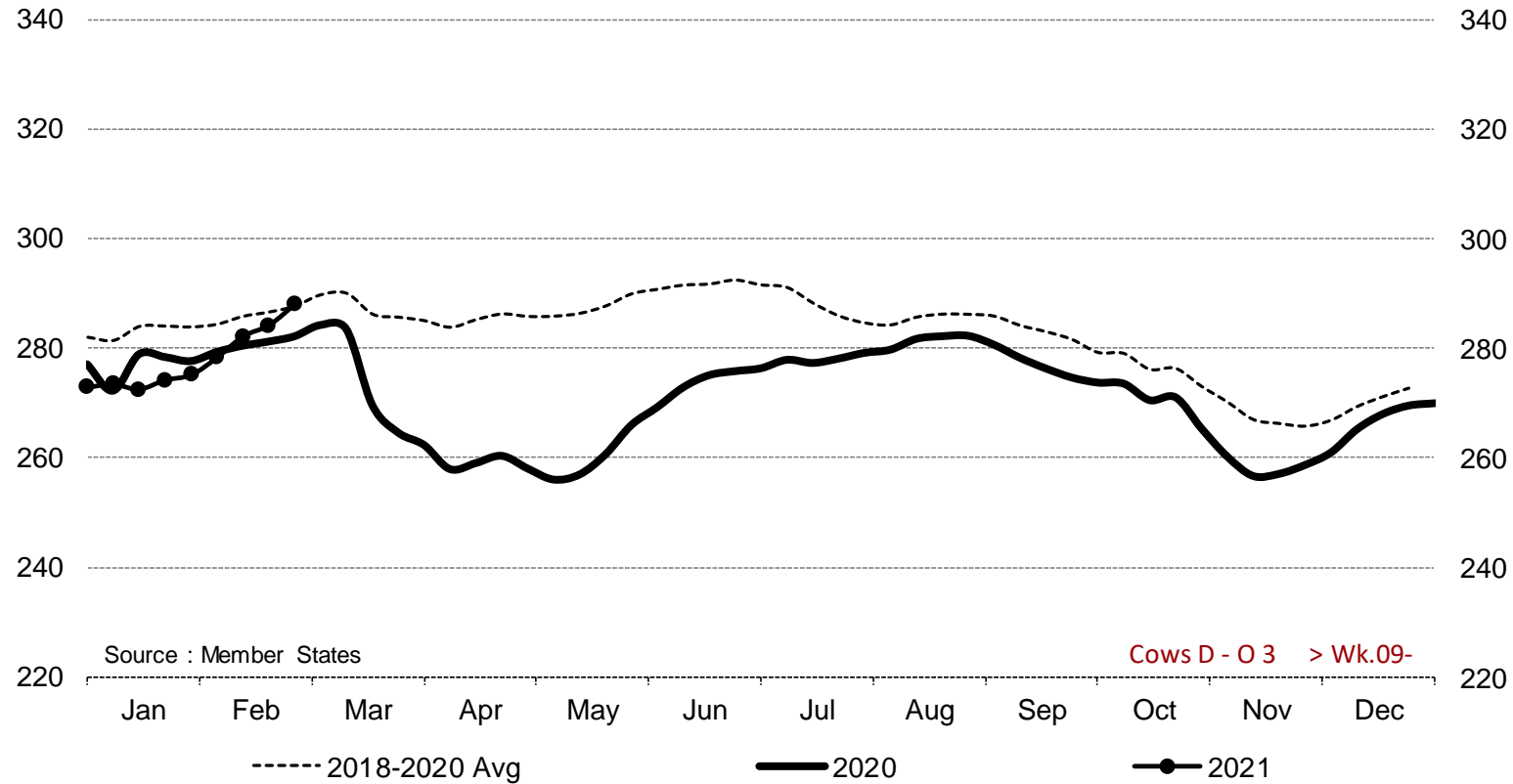
Price in week 09 : **379.47**
% change y/y : **+ 2.1%**

Average price in February 2021 : **383.62**
% change y/y : **+ 3.9%**

PRICES CARCASSES

E.U. EVOLUTION
COW – D.03

Cows D - O 3 > Wk.09-2021



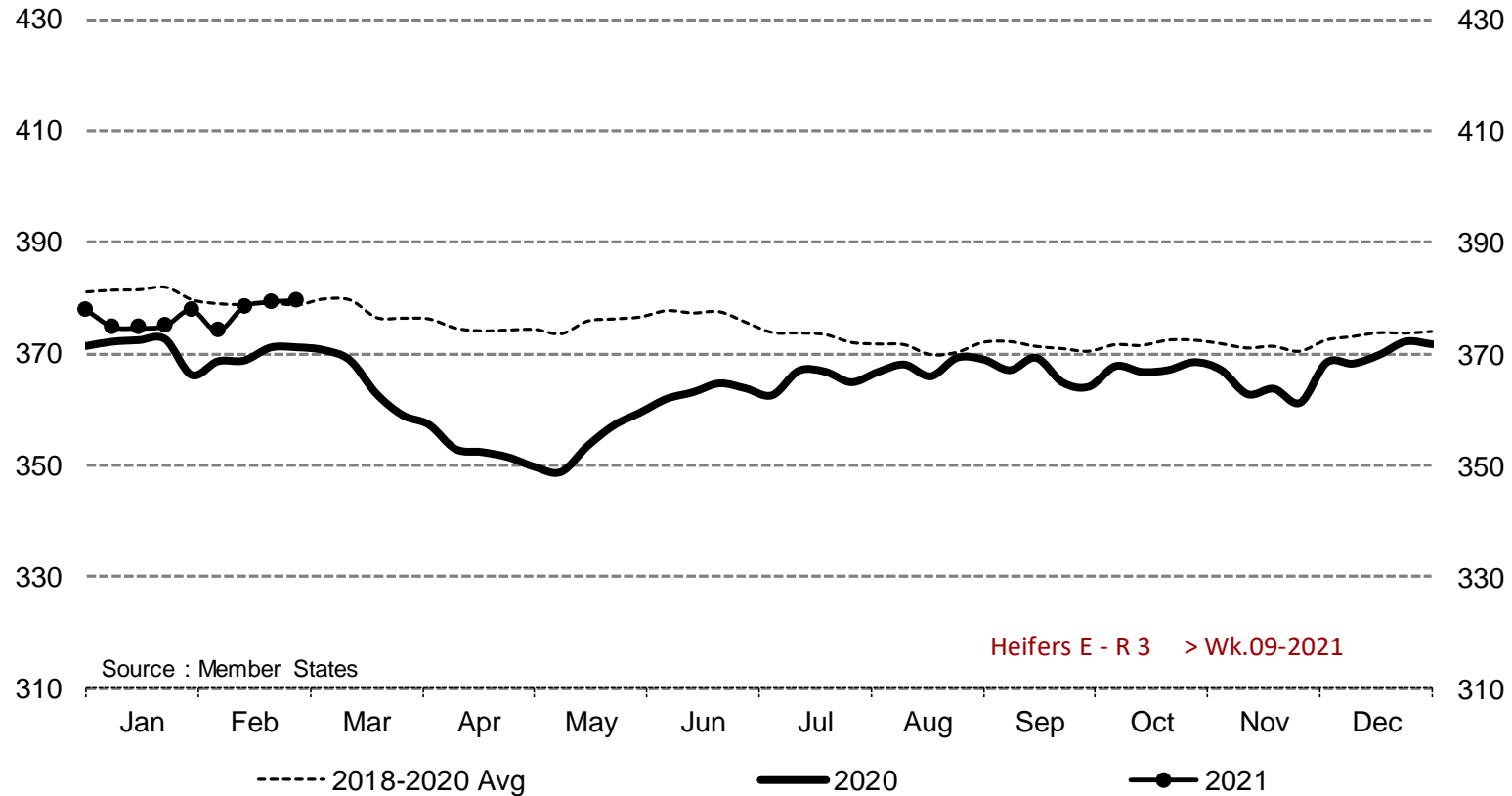
Price in week 09 : **287.99**
% change y/y : **+ 2.1%**

Average price in February 2021 : **279.91**
% change y/y : **- 0.2%**

PRICES CARCASSES

EU EVOLUTION HEIFER - E.R3

Heifers E - R 3 > Wk.09-2021

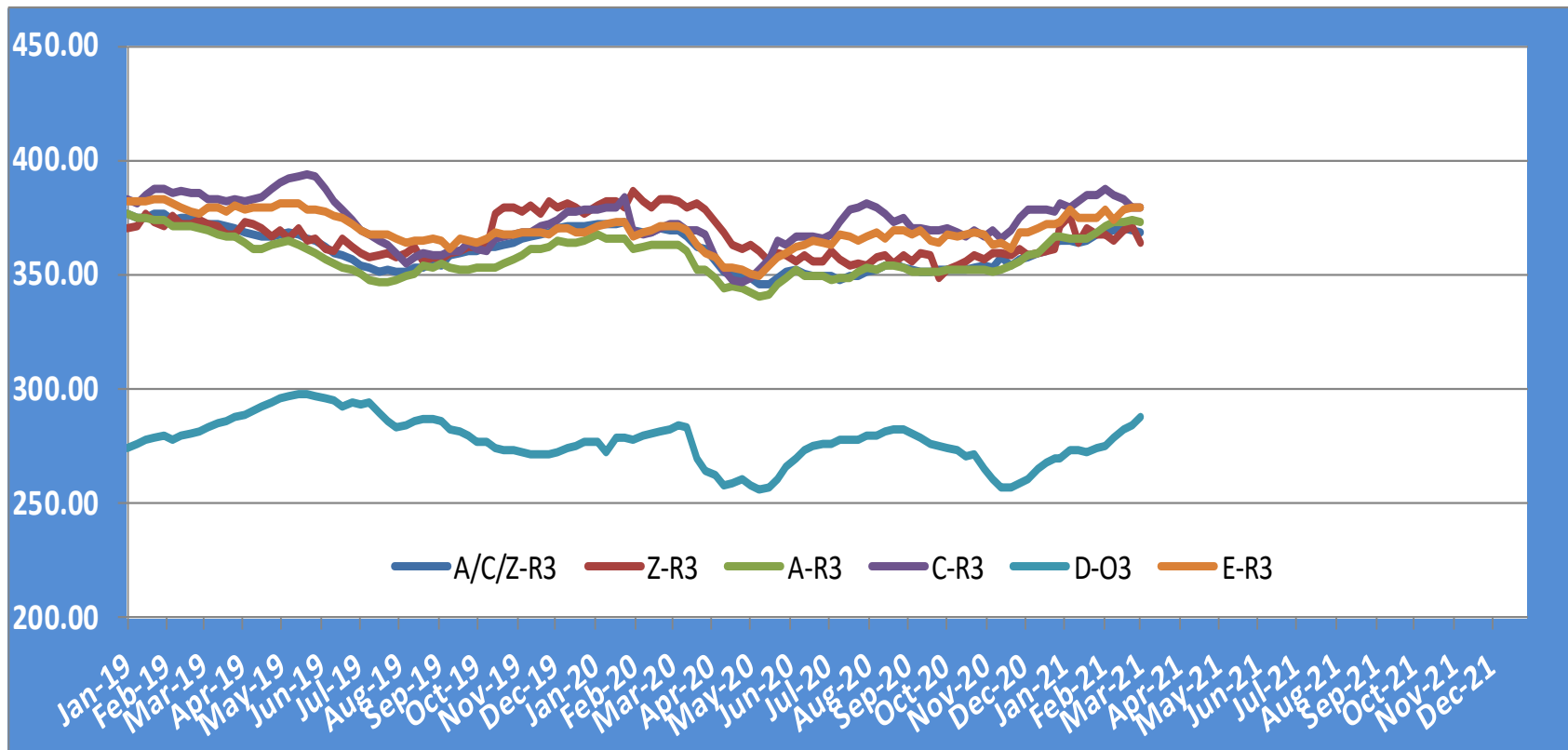


Price in week 09 : **379.63**
% change y/y : **+ 2.2%**

Average price in February 2021 : **377.48**
% change y/y : **+ 2.1%**

PRICES CARCASSES

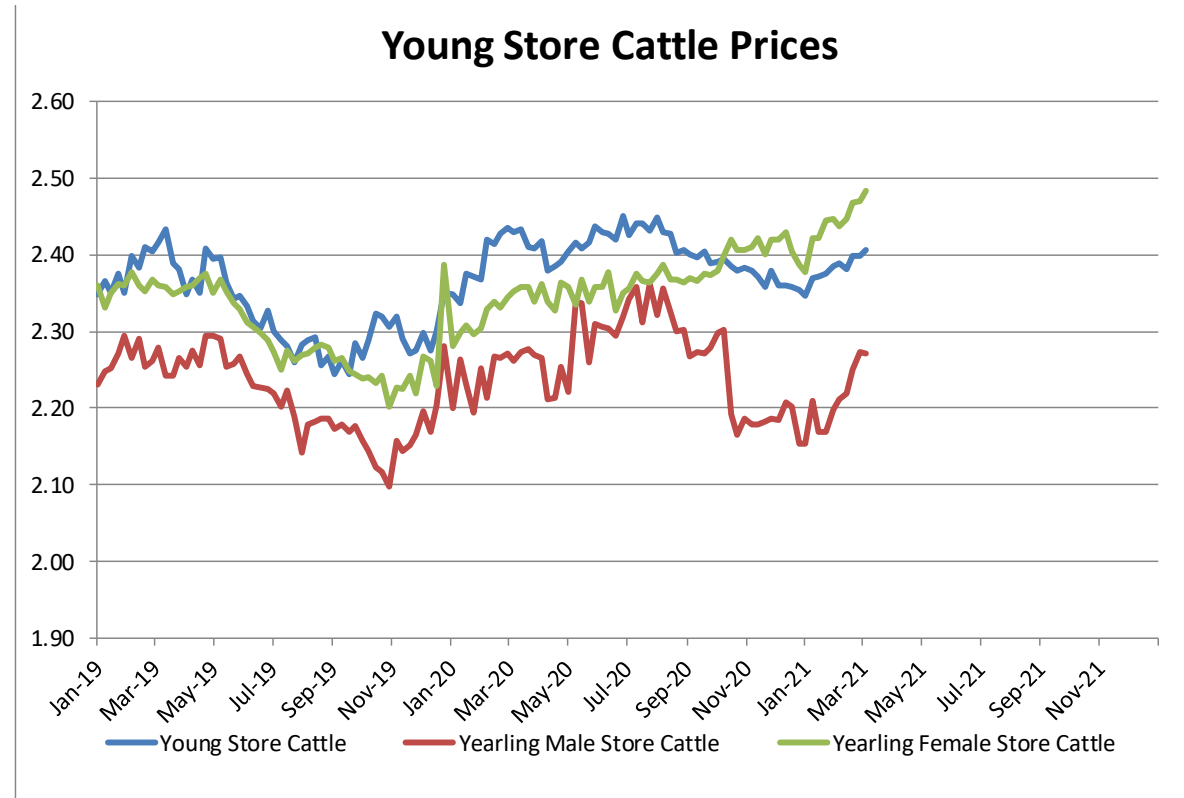
EU EVOLUTION ALL CAT GLOBAL VIEW



PRICES LIVE BOVINES

EU EVOLUTION STORE CATTLE

Store cattle (€/100 kg live weight)



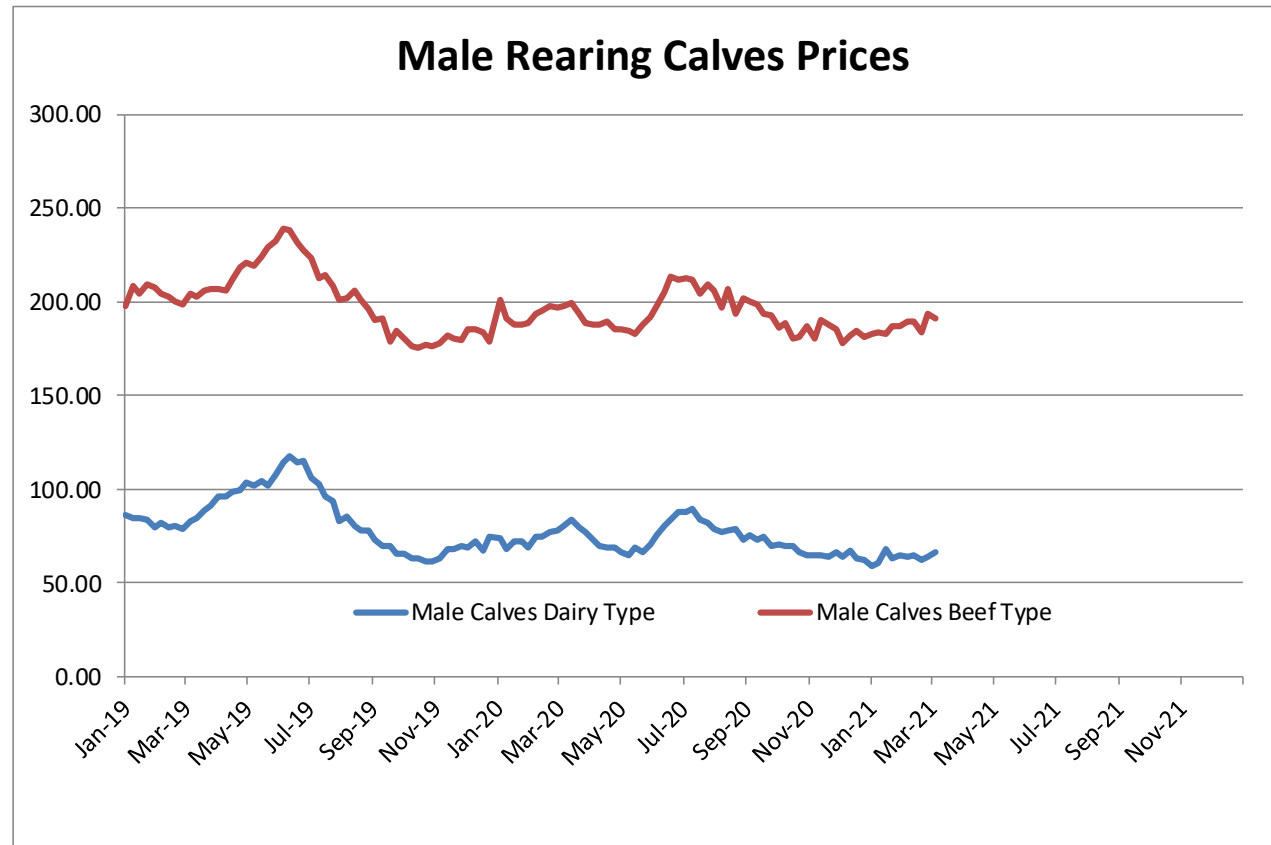
Young Store Cattle Price in	Week 9	2.41	Yearling Male Store Cattle Price	2.27
	Change y/y	-1.16%	Change y/y	+0.04%
Yearling Female Store Cattle Price		2.48		
	Change y/y	+5.94%		

18 March 2021

PRICES LIVE BOVINES

EU EVOLUTION Male Calves – 8D4W

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



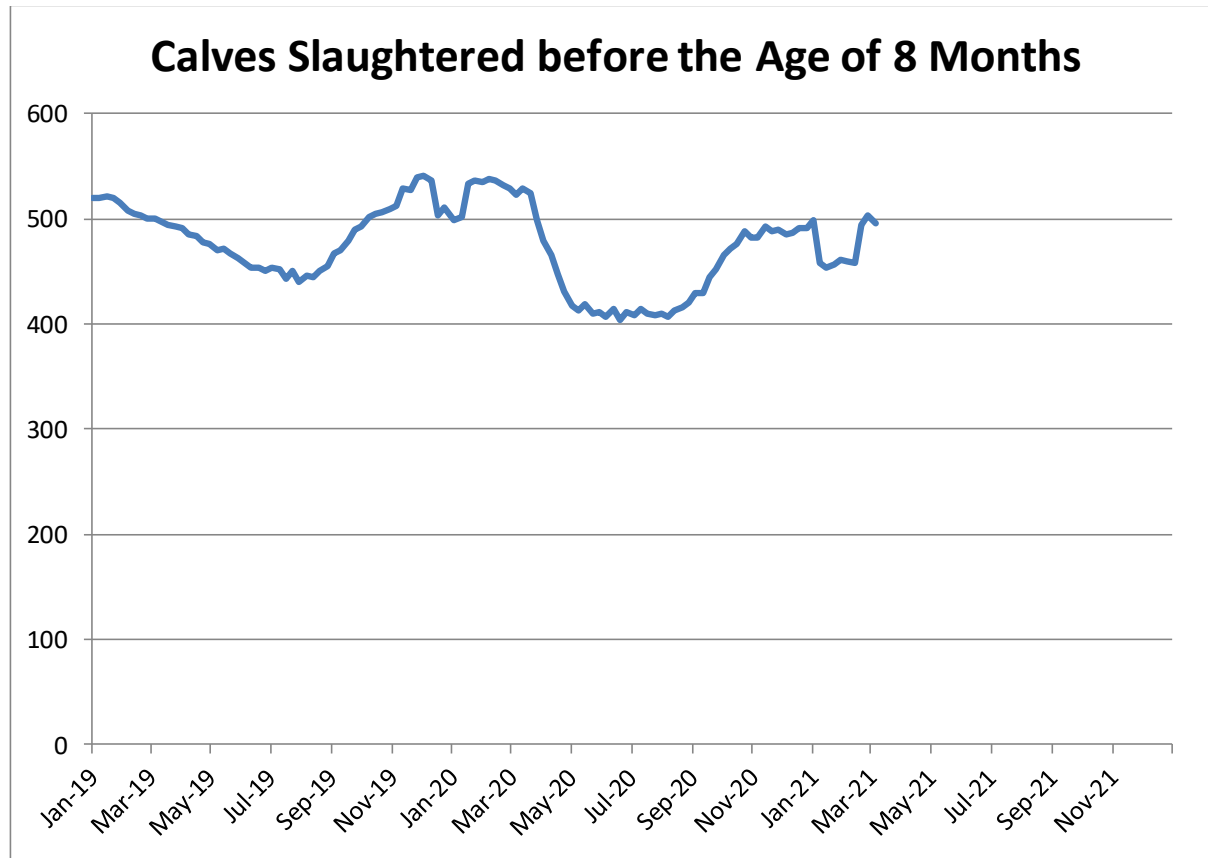
Male Rearing Calves Beef type		Male Rearing Calves Dairy type	
Price in Week 9	190.93	Price in Week 9	66.50
Change y/y	-3.21%	Change y/y	-14.66%

18 March 2021

PRICES LIVE BOVINES

EU EVOLUTION Butcher Calves

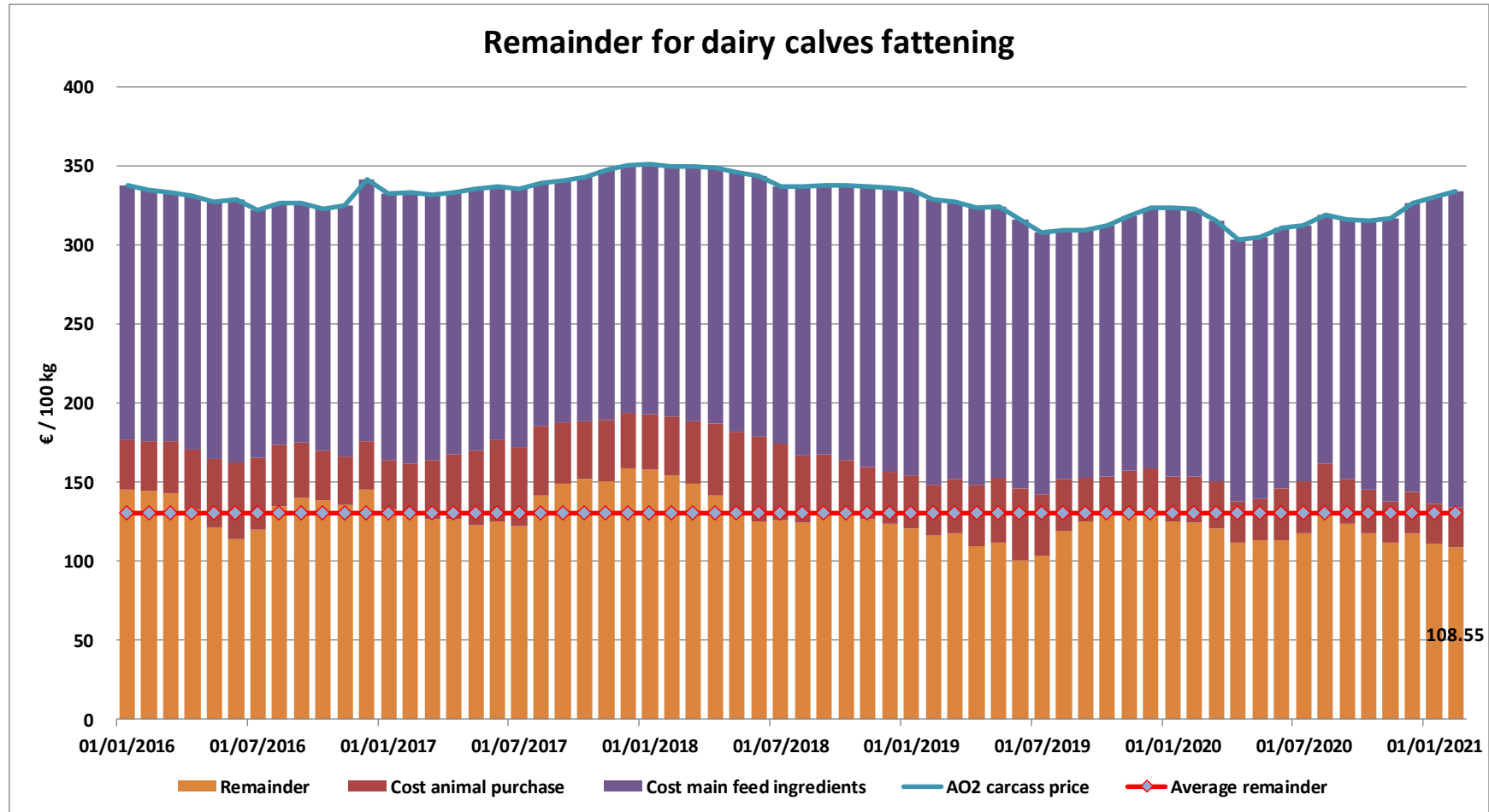
Calves slaughtered before the age of less than 8 months
(€/100 kg cw)



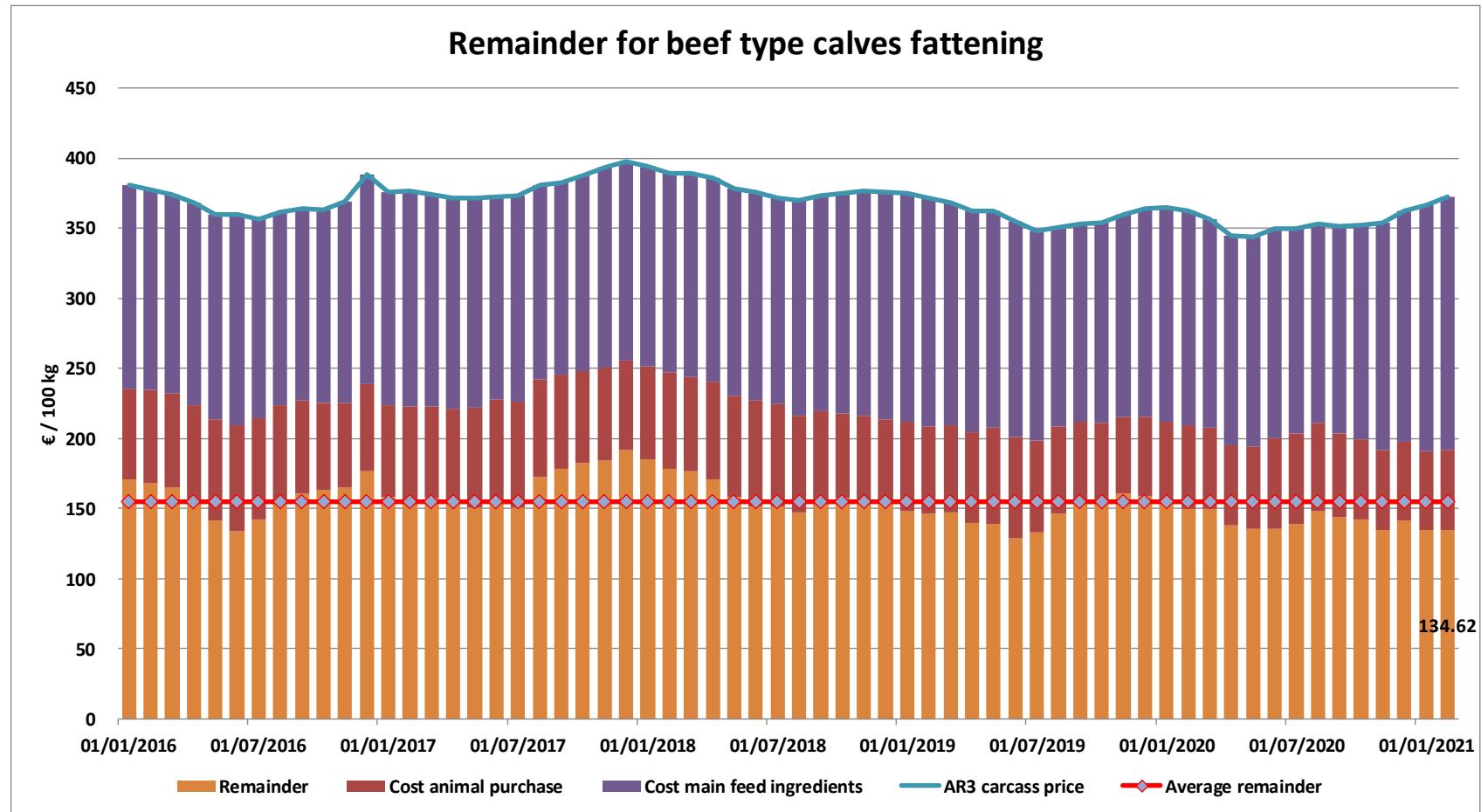
Price in Week 9 **495.34 € / 100 kg of carcasse weight**
Change y/y **-6.44%**

18 March 2021

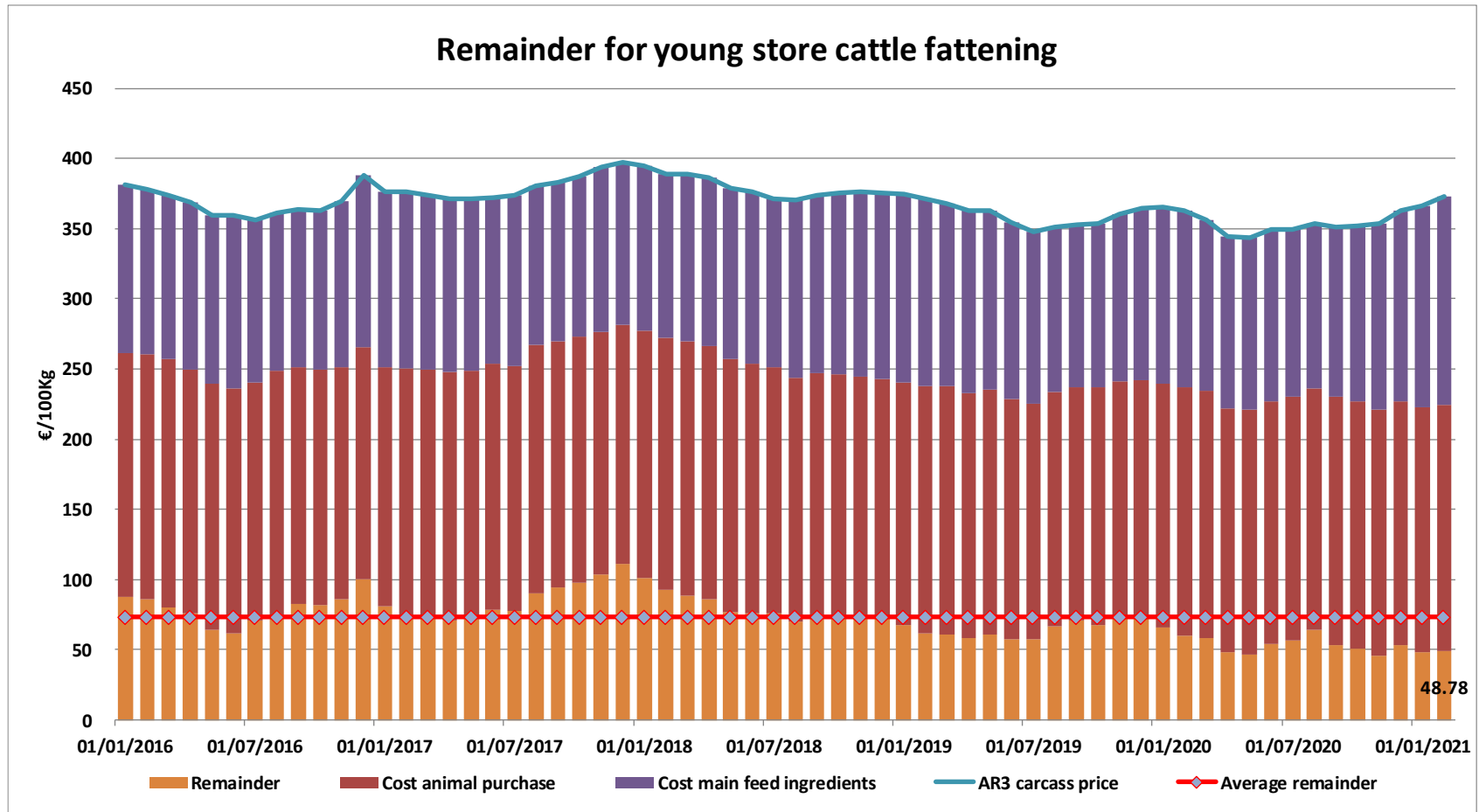
REMAINDERS



REMAINDERS



REMAINDERS



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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