



# BEEF & VEAL MARKET SITUATION



Beef CMO 21 October 2021

# LIVESTOCK

JUNE SURVEY

# EU EVOLUTION TOTAL BOVINE

| May/Jun<br>1000 Hd | TOT LIVESTOCK |        |        |        | %Var<br>2021<br>2020 | BOVINE < 1 Year |        |        |        | %Var<br>2021<br>2020 | BOVINE 1-2 Year |        |        |        | %Var<br>2021<br>2020 | BOVINE > 2 Year |        |        |        | %Var<br>2021<br>2020 |
|--------------------|---------------|--------|--------|--------|----------------------|-----------------|--------|--------|--------|----------------------|-----------------|--------|--------|--------|----------------------|-----------------|--------|--------|--------|----------------------|
|                    | 2018          | 2019   | 2020   | 2021   |                      | 2018            | 2019   | 2020   | 2021   |                      | 2018            | 2019   | 2020   | 2021   |                      | 2018            | 2019   | 2020   | 2021   |                      |
| BE                 | 2 450         | 2 406  | 2 388  | 2 342  | -1.9%                | 710             | 706    | 716    | 708    | -1.0%                | 492             | 475    | 471    | 471    | -0.1%                | 1 247           | 1 226  | 1 201  | 1 163  | -3.2%                |
| BG                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| CZ                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| DK                 | 1 560         | 1 512  | 1 517  | 1 503  | -0.9%                | 538             | 510    | 517    | 517    | idem                 | 294             | 292    | 291    | 287    | -1.4%                | 729             | 710    | 709    | 699    | -1.4%                |
| DE                 | 12 093        | 11 763 | 11 423 | 11 176 | -2.2%                | 3 618           | 3 502  | 3 410  | 3 398  | -0.4%                | 2 848           | 2 788  | 2 683  | 2 591  | -3.4%                | 5 627           | 5 473  | 5 330  | 5 188  | -2.7%                |
| EE                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| IE                 | 7 349         | 7 209  | 7 314  | 7 359  | +0.6%                | 2 078           | 2 008  | 2 117  | 2 146  | +1.4%                | 1 919           | 1 861  | 1 807  | 1 910  | +5.7%                | 3 351           | 3 340  | 3 390  | 3 303  | -2.6%                |
| EL                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| ES                 | 6 725         | 6 722  | 6 715  | 6 911  | +2.9%                | 2 504           | 2 507  | 2 488  | 2 626  | +5.6%                | 990             | 978    | 930    | 975    | +4.9%                | 3 230           | 3 237  | 3 297  | 3 310  | +0.4%                |
| FR                 | 18 737        | 18 470 | 18 200 | 17 863 | -1.9%                | 5 125           | 5 227  | 5 144  | 5 134  | -0.2%                | 3 417           | 3 229  | 3 249  | 3 158  | -2.8%                | 10 195          | 10 014 | 9 808  | 9 571  | -2.4%                |
| HR                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| IT                 | 6 170         | 6 016  | 6 116  | 6 174  | +0.9%                | 1 757           | 1 746  | 1 746  | 1 762  | +0.9%                | 1 466           | 1 409  | 1 458  | 1 476  | +1.2%                | 2 948           | 2 861  | 2 912  | 2 936  | +0.8%                |
| CY                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| LV                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| LT                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| LU                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| HU                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| MT                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| NL                 | 3 897         | 3 750  | 3 766  | 3 733  | -0.9%                | 1 560           | 1 536  | 1 558  | 1 523  | -2.2%                | 520             | 460    | 446    | 480    | +7.6%                | 1 817           | 1 754  | 1 762  | 1 730  | -1.8%                |
| AT                 | 1 907         | 1 873  | 1 844  | 1 846  | +0.1%                | 606             | 596    | 588    | 596    | +1.4%                | 433             | 425    | 416    | 413    | -0.7%                | 869             | 853    | 841    | 838    | -0.4%                |
| PL                 | 6 201         | 6 358  | 6 344  | 6 401  | +0.9%                | 1 686           | 1 771  | 1 729  | 1 789  | +3.5%                | 1 734           | 1 768  | 1 796  | 1 856  | +3.3%                | 2 781           | 2 820  | 2 819  | 2 756  | -2.2%                |
| PT                 | 1 722         | 1 712  | 1 751  | 1 723  | -1.5%                | 529             | 524    | 557    | 550    | -1.4%                | 274             | 267    | 264    | 252    | -4.7%                | 919             | 921    | 929    | 922    | -0.8%                |
| RO                 | 2 002         | 1 963  | 1 915  | 1 864  | -2.6%                | 444             | 428    | 418    | 386    | -7.7%                | 236             | 230    | 217    | 207    | -4.4%                | 1 322           | 1 305  | 1 280  | 1 271  | -0.7%                |
| SI                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| SK                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| FI                 |               |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |                 |        |        |        |                      |
| SE                 | 1 507         | 1 466  | 1 453  | 1 453  | -0.0%                | 475             | 451    | 462    | 465    | +0.6%                | 381             | 380    | 362    | 369    | +2.1%                | 651             | 636    | 629    | 618    | -1.7%                |
| EU                 | 72 320        | 71 220 | 70 747 | 70 348 | -0.6%                | 21 631          | 21 512 | 21 451 | 21 600 | +0.7%                | 15 003          | 14 559 | 14 389 | 14 444 | +0.4%                | 35 687          | 35 149 | 34 907 | 34 304 | -1.7%                |
| UK                 | 9 891         | 9 739  | 9 615  |        |                      | 2 908           | 2 857  | 2 878  |        |                      | 2 479           | 2 448  | 2 412  |        |                      | 4 504           | 4 434  | 4 324  |        |                      |

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2020 AND 2021

# LIVESTOCK

JUNE SURVEY

# EU EVOLUTION TOTAL BOVINE

| May/Jun<br>1000 Hd | TOTAL COWS |        |        |        | %Var<br>2021<br>2020 | DAIRY COWS |        |        |        | %Var<br>2021<br>2020 | OTHER COWS |       |       |       | %Var<br>2021<br>2020 |
|--------------------|------------|--------|--------|--------|----------------------|------------|--------|--------|--------|----------------------|------------|-------|-------|-------|----------------------|
|                    | 2018       | 2019   | 2020   | 2021   |                      | 2018       | 2019   | 2020   | 2021   |                      | 2018       | 2019  | 2020  | 2021  |                      |
| BE                 | 968        | 960    | 954    | 932    | -2.2%                | 532        | 536    | 544    | 536    | -1.5%                | 435        | 425   | 409   | 396   | -3.2%                |
| BG                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| CZ                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| DK                 | 667        | 654    | 653    | 647    | -0.9%                | 575        | 567    | 567    | 565    | -0.4%                | 91         | 87    | 86    | 82    | -4.7%                |
| DE                 | 4 830      | 4 720  | 4 609  | 4 517  | -2.0%                | 4 167      | 4 067  | 3 969  | 3 892  | -2.0%                | 663        | 653   | 640   | 626   | -2.3%                |
| EE                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| IE                 | 2 529      | 2 505  | 2 551  | 2 545  | -0.2%                | 1 481      | 1 505  | 1 568  | 1 605  | +2.4%                | 1 048      | 1 000 | 983   | 940   | -4.4%                |
| EL                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| ES                 | 2 865      | 2 854  | 2 927  | 2 954  | +0.9%                | 825        | 815    | 810    | 819    | +1.1%                | 2 040      | 2 039 | 2 117 | 2 135 | +0.9%                |
| FR                 | 7 652      | 7 546  | 7 442  | 7 315  | -1.7%                | 3 512      | 3 471  | 3 403  | 3 331  | -2.1%                | 4 141      | 4 075 | 4 039 | 3 984 | -1.4%                |
| HR                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| IT                 | 2 192      | 2 110  | 2 130  | 2 161  | +1.4%                | 1 904      | 1 840  | 1 844  | 1 852  | +0.4%                | 288        | 270   | 286   | 309   | +8.0%                |
| CY                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| LV                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| LT                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| LU                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| HU                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| MT                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| NL                 | 1 685      | 1 641  | 1 651  | 1 628  | -1.4%                | 1 622      | 1 578  | 1 593  | 1 572  | -1.3%                | 63         | 63    | 58    | 56    | -4.5%                |
| AT                 | 740        | 726    | 716    | 715    | -0.2%                | 538        | 525    | 523    | 531    | +1.6%                | 202        | 201   | 193   | 184   | -5.0%                |
| PL                 | 2 429      | 2 461  | 2 468  | 2 388  | -3.2%                | 2 233      | 2 221  | 2 218  | 2 113  | -4.7%                | 196        | 240   | 250   | 276   | +10.4%               |
| PT                 | 745        | 742    | 757    | 757    | +0.1%                | 244        | 238    | 239    | 236    | -1.2%                | 501        | 504   | 517   | 521   | +0.7%                |
| RO                 | 1 197      | 1 179  | 1 160  | 1 148  | -1.0%                | 1 184      | 1 162  | 1 145  | 1 133  | -1.0%                | 12         | 17    | 15    | 15    | idem                 |
| SI                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| SK                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| FI                 |            |        |        |        |                      |            |        |        |        |                      |            |       |       |       |                      |
| SE                 | 534        | 516    | 510    | 511    | +0.2%                | 319        | 306    | 303    | 300    | -1.1%                | 214        | 210   | 207   | 211   | +2.1%                |
| EU                 | 29 034     | 28 612 | 28 528 | 28 219 | -1.1%                | 19 137     | 18 831 | 18 727 | 18 485 | -1.3%                | 9 896      | 9 782 | 9 801 | 9 735 | -0.7%                |
| UK                 | 3 441      | 3 398  | 3 359  |        |                      | 1 883      | 1 871  | 1 850  |        |                      | 1 558      | 1 527 | 1 509 |       |                      |

Source : EStat Newcronos

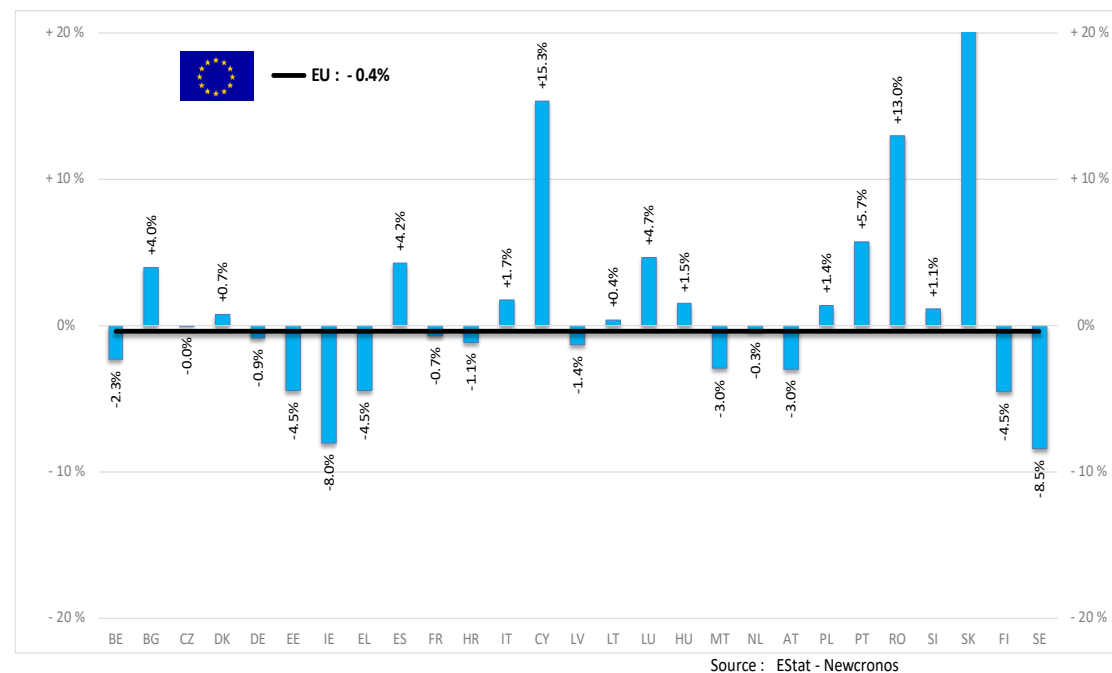
EU %Var is calculated considering only countries available in 2020 AND 2021

# PRODUCTION

# % EVOLUTION HEADS

| HEADS                  | Jan-Jul 21/20 |
|------------------------|---------------|
|                        | <b>EU</b>     |
| Bull                   | +0.9%         |
| Bullock                | -5.1%         |
| Cow                    | +0.8%         |
| Heifer                 | -0.7%         |
| Calve                  | -2.4%         |
| Young cattle           | -1.6%         |
| Meat of bovine animals | -0.4%         |

Estimates for last month of period :

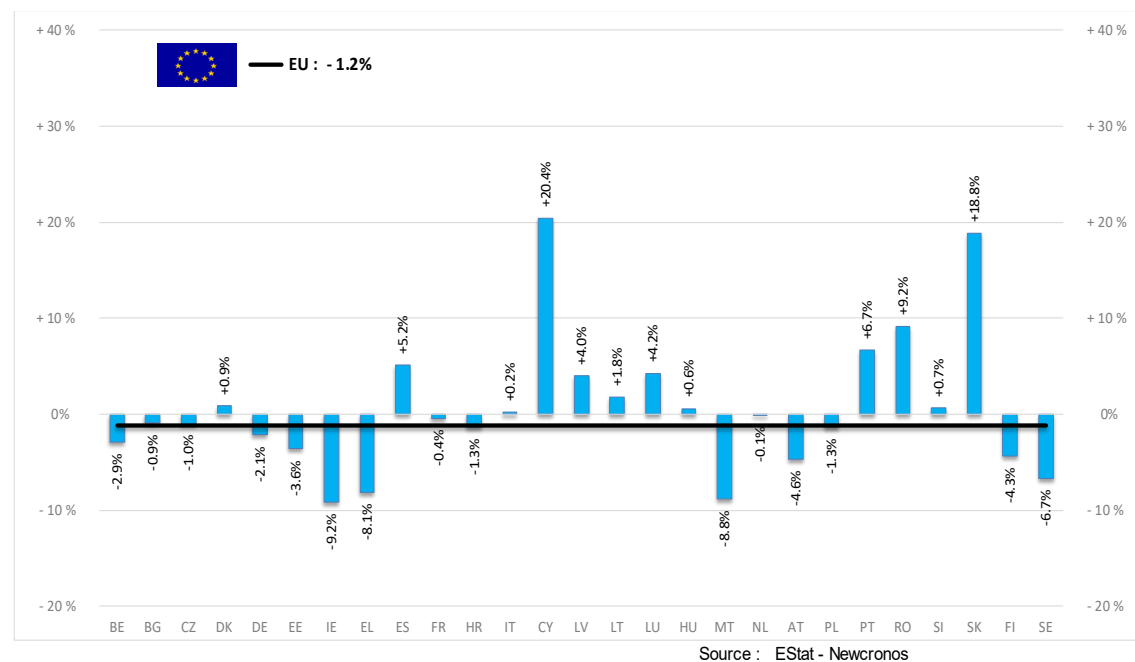


# PRODUCTION

# % EVOLUTION TONNES

| TONNES                 | Jan-Jul 21/20 |
|------------------------|---------------|
|                        | <b>EU</b>     |
| Bull                   | -1.1%         |
| Bullock                | -5.3%         |
| Cow                    | -0.5%         |
| Heifer                 | -1.1%         |
| Calve                  | -0.7%         |
| Young cattle           | -2.3%         |
| Meat of bovine animals | -1.2%         |

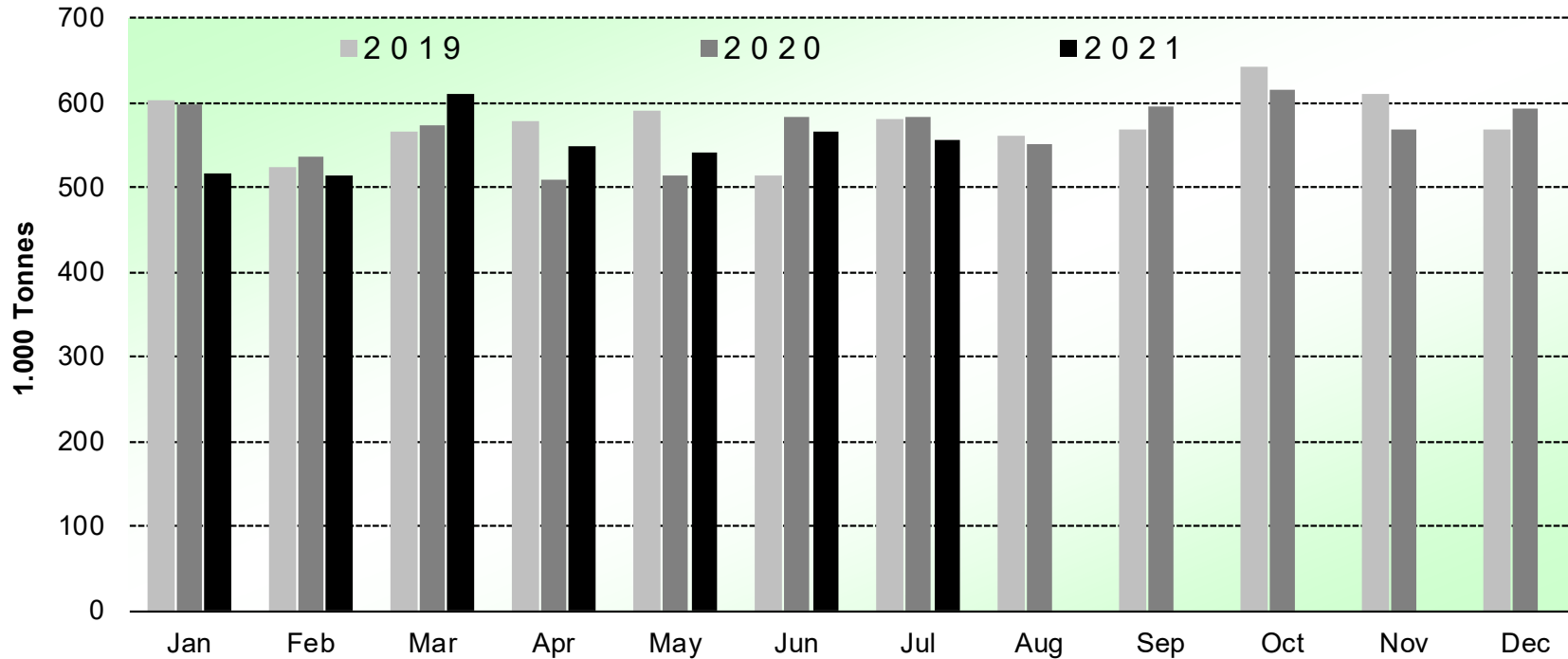
Estimates for last month of period :



# PRODUCTION

# HISTORIC TONNES

## Beef & Veal Production (EU Slaughtering) - Tonnes



Source : EStat-Newcronos

# PRICES CARCASSES

Dashboard

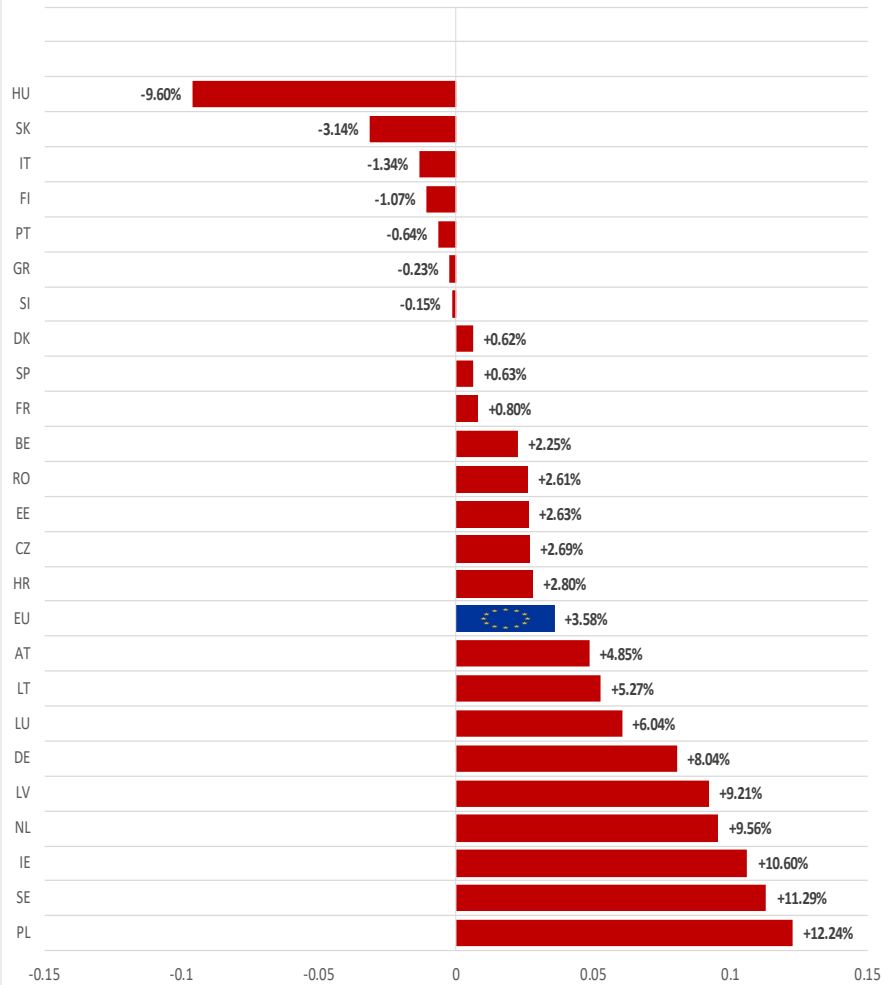
| EU Prices week |                              | 40    | Evolution since last week | Evolution since last month | Evolution since last year |
|----------------|------------------------------|-------|---------------------------|----------------------------|---------------------------|
| Carcasse       | Average A/C/Z-R3             | 403.3 | + 1.2%                    | + 2.9%                     | + 14.5%                   |
|                | Young Bovines (Z)            | 395.1 | + 1.7%                    | + 3.3%                     | + 1.7%                    |
|                | Young Bulls (A)              | 402.2 | + 1.3%                    | + 3.3%                     | + 14.6%                   |
|                | Steers (C)                   | 417.7 | + 0.7%                    | + 0.9%                     | + 14.7%                   |
|                | Cows (D)                     | 335.6 | + 0.3%                    | + 1.4%                     | + 22.6%                   |
|                | Heifers (E)                  | 416.5 | + 0.6%                    | + 3.0%                     | + 13.2%                   |
| Live Animals   | Male Calves Dairy Type       | 82.92 | - 6.3%                    | - 17.7%                    | + 17.1%                   |
|                | Male Calves Beef Type        | 215.6 | - 1.3%                    | - 2.9%                     | + 15.6%                   |
|                | Young Store Cattle           | 2.71  | - 0.3%                    | + 0.1%                     | + 5.5%                    |
|                | Yearling Male Store Cattle   | 3.32  | - 2.9%                    | + 1.1%                     | + 47.3%                   |
|                | Yearling Female Store Cattle | 2.56  | - 0.7%                    | - 1.7%                     | + 7.7%                    |
|                | Calves slaughtered <8M       | 536.4 | + 0.2%                    | + 2.0%                     | + 15.1%                   |

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

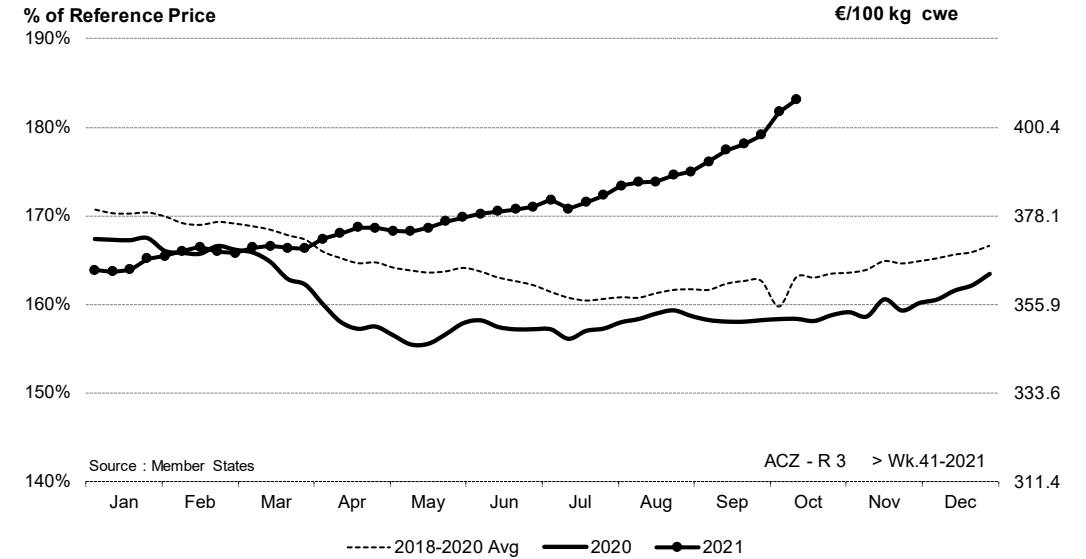
# PRICES CARCASSES

# EU EVOLUTION A/C/Z.R3

EU ACZ R3 Price Comparison between average monthly price October 2020 - September 2021 compared to October 2019 - September 2020



ACZ - R 3 > Wk.41-2021



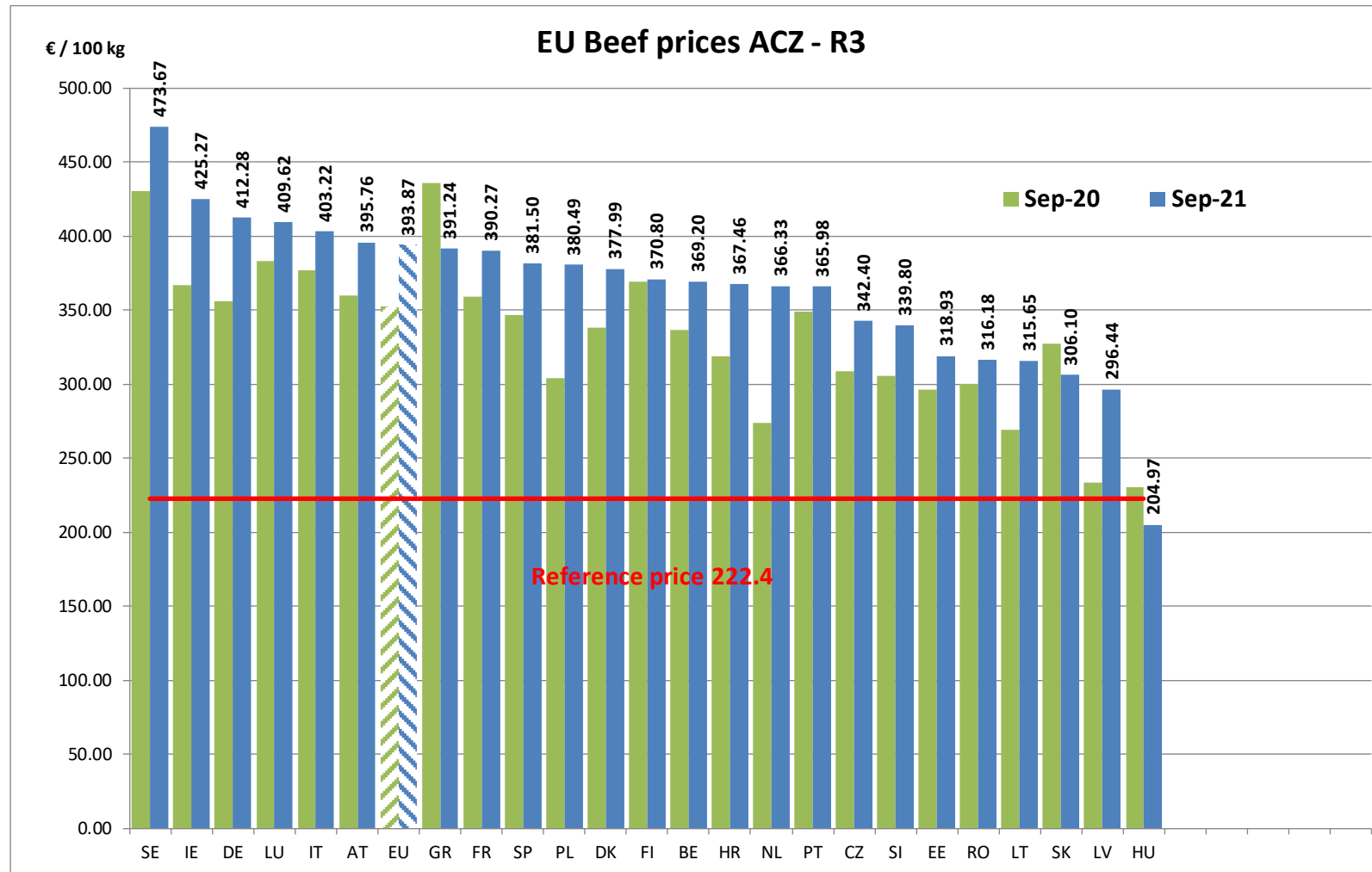
Price in week 41 : **407.19**  
 % change y/y : **+ 15.61%**  
 % Ref. Price in wk 41 : **183.1%**

Average price in September 2021 : **393.87**  
 % change y/y : **+ 11.98%**



# PRICES CARCASSES

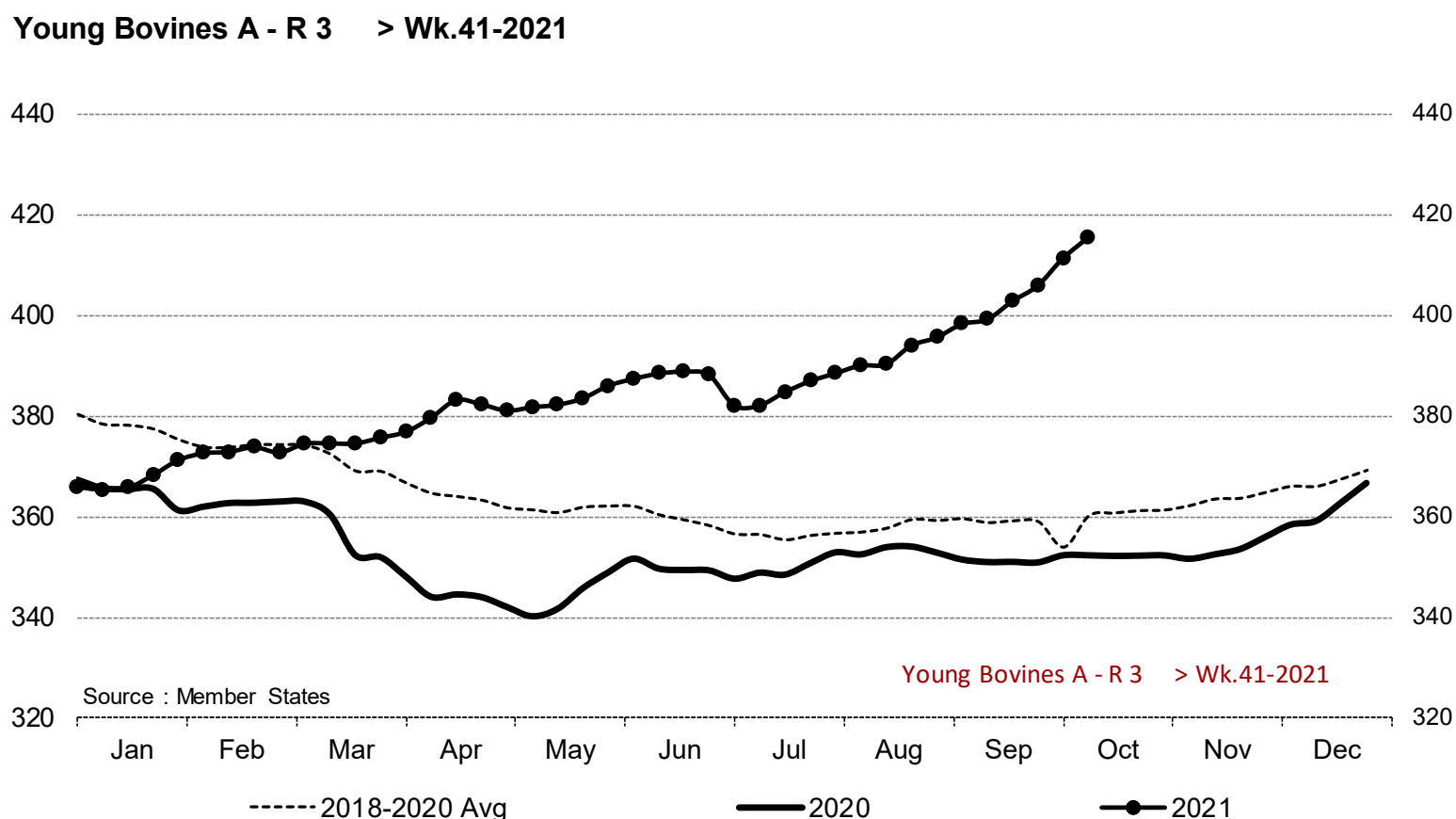
## EU EVOLUTION A/C/Z.R3



# PRICES CARCASSES

# EU EVOLUTION YOUNG BULL – A.R3

Young Bovines A - R 3 > Wk.41-2021

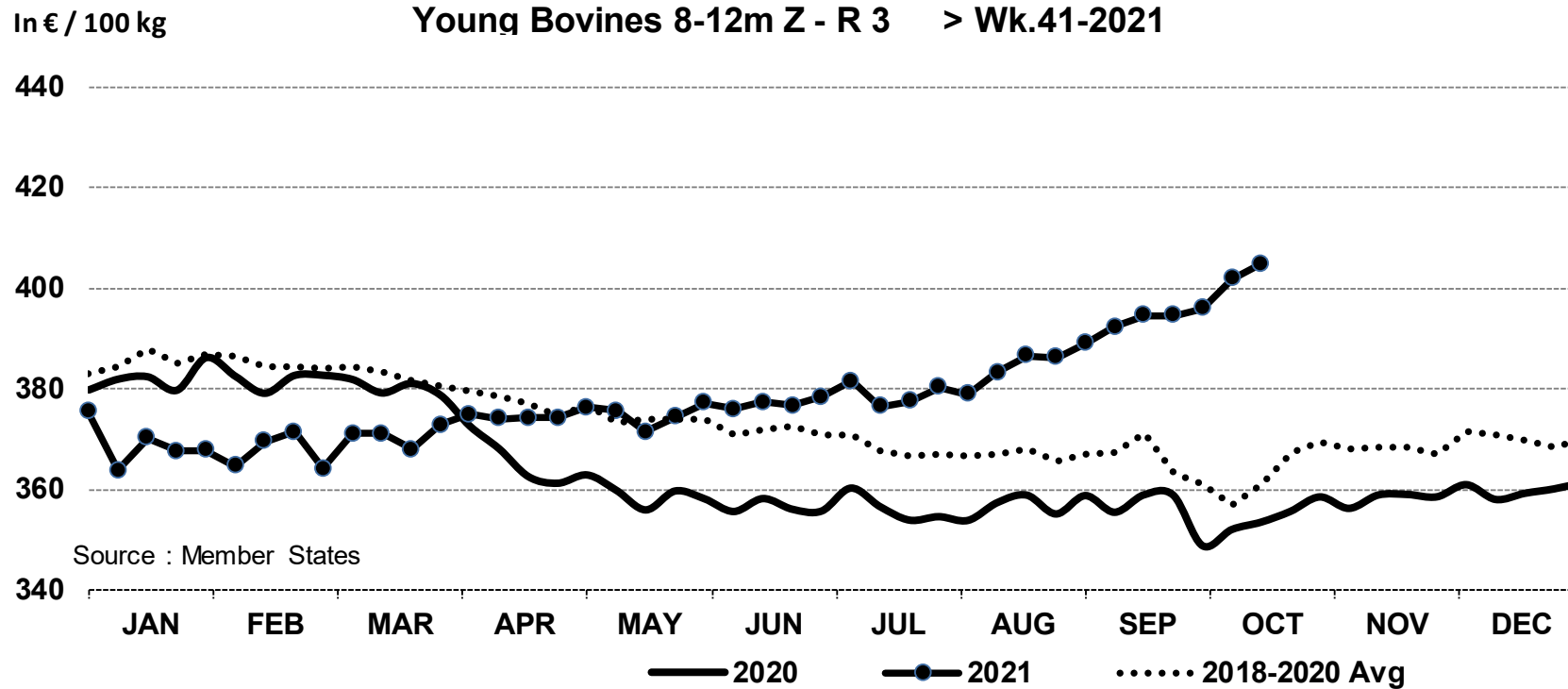


Price in week 41 : **415.44**  
% change y/y : **+ 17.9%**

Average price in September 2021 : **400.10**  
% change y/y : **+ 13.9%**

# PRICES CARCASSES

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



Price in week 41 : **404.80**  
% change y/y : **+ 14.5%**

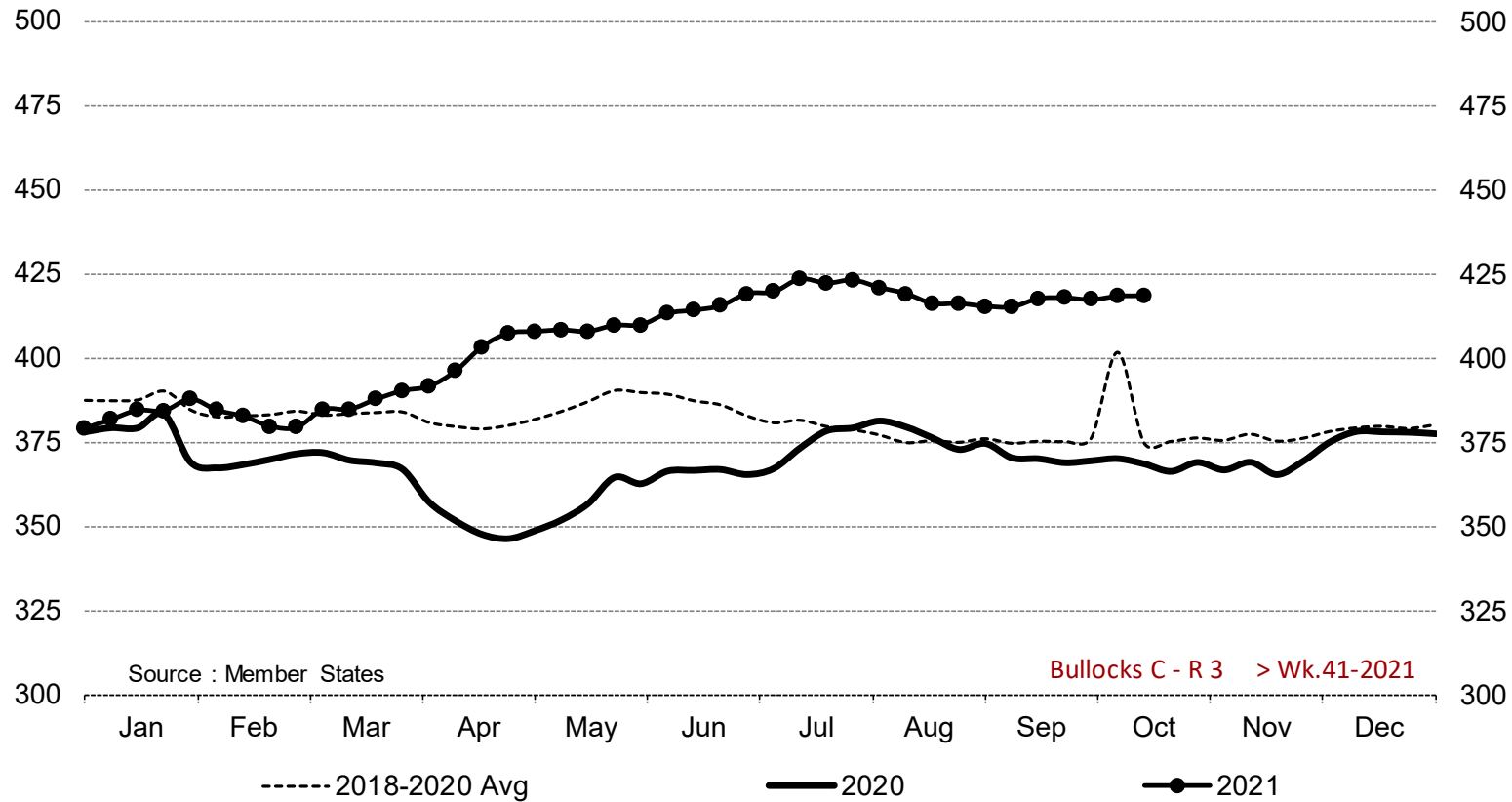
16/09/2021

Average price in September 2021 : **393.31**  
% change y/y : **+ 10.7%**

# PRICES CARCASSES

## E.U. EVOLUTION STEER – C.R3

Bullocks C - R 3 > Wk.41-2021



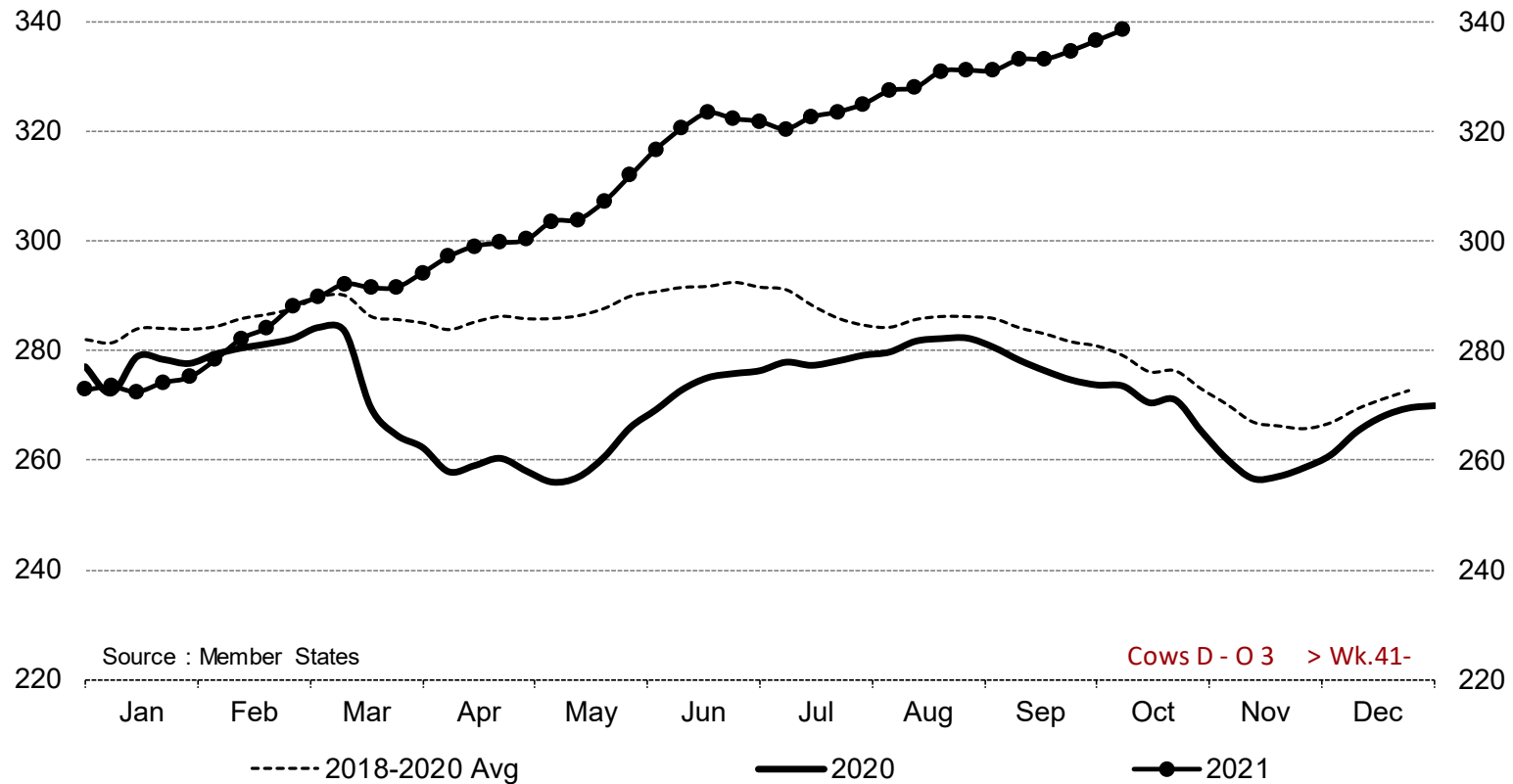
Price in week 41 : **418.37**  
% change y/y : **+ 13.5%**

Average price in September 2021 : **416.61**  
% change y/y : **+ 12.7%**

# PRICES CARCASSES

E.U. EVOLUTION  
COW – D.03

Cows D - O 3 > Wk.41-2021



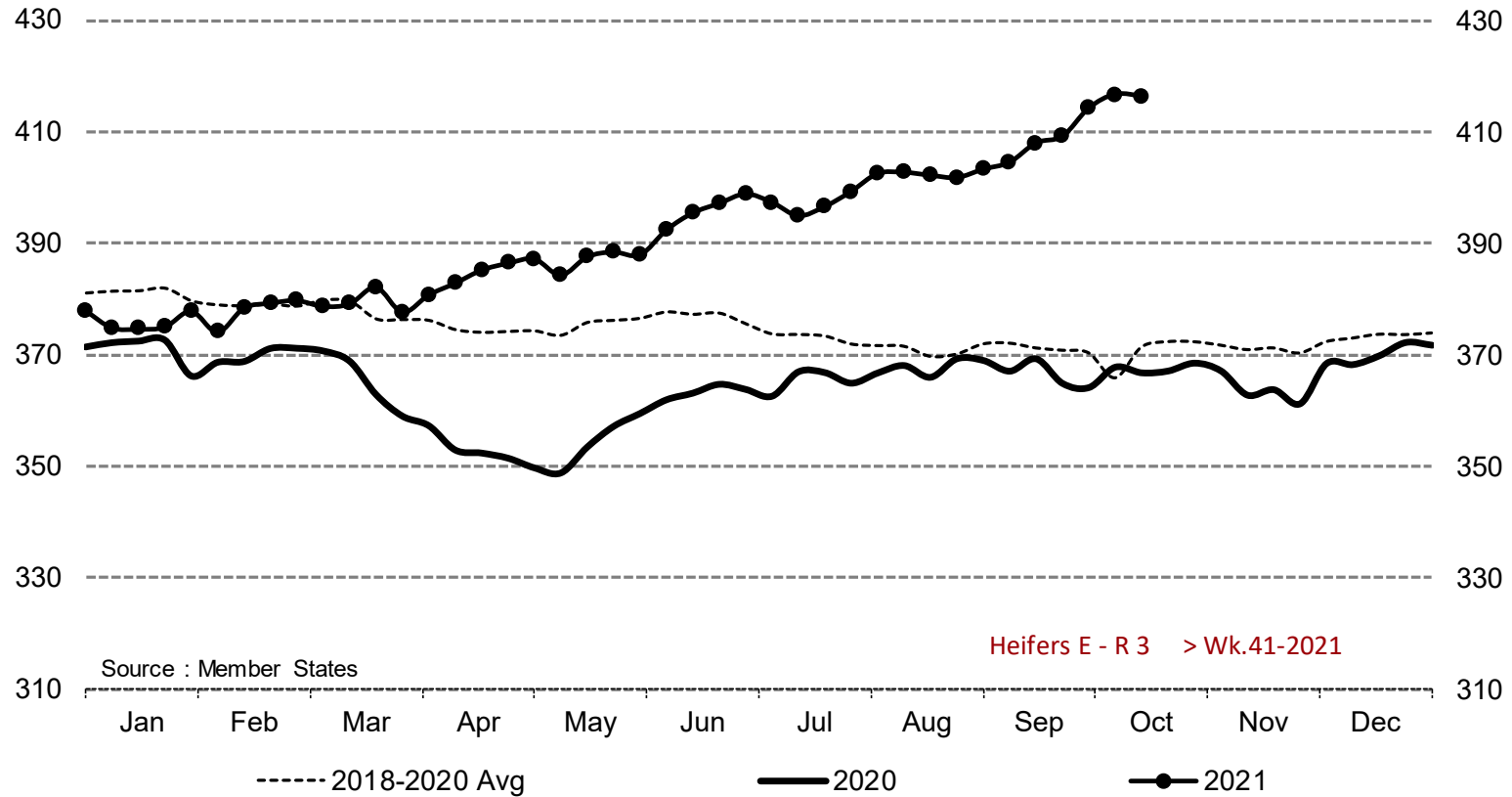
Price in week 41 : **338.37**  
% change y/y : **+ 23.7%**

Average price in September 2021 : **332.40**  
% change y/y : **+ 20.0%**

# PRICES CARCASSES

## EU EVOLUTION HEIFER - E.R3

Heifers E - R 3 > Wk.41-2021

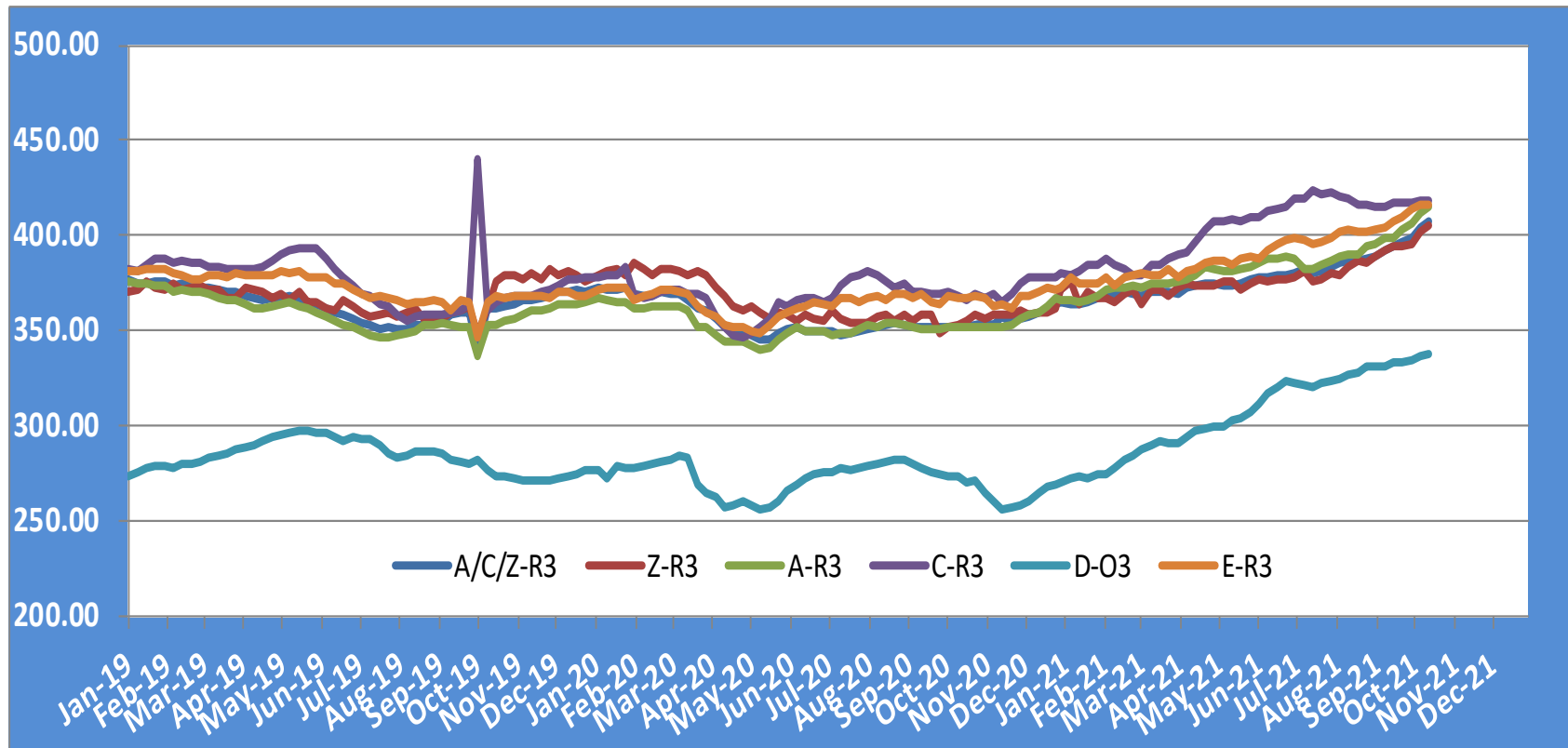


Price in week 41 : **416.34**  
% change y/y : **+ 13.5%**

Average price in September 2021 : **407.51**  
% change y/y : **+ 11.2%**

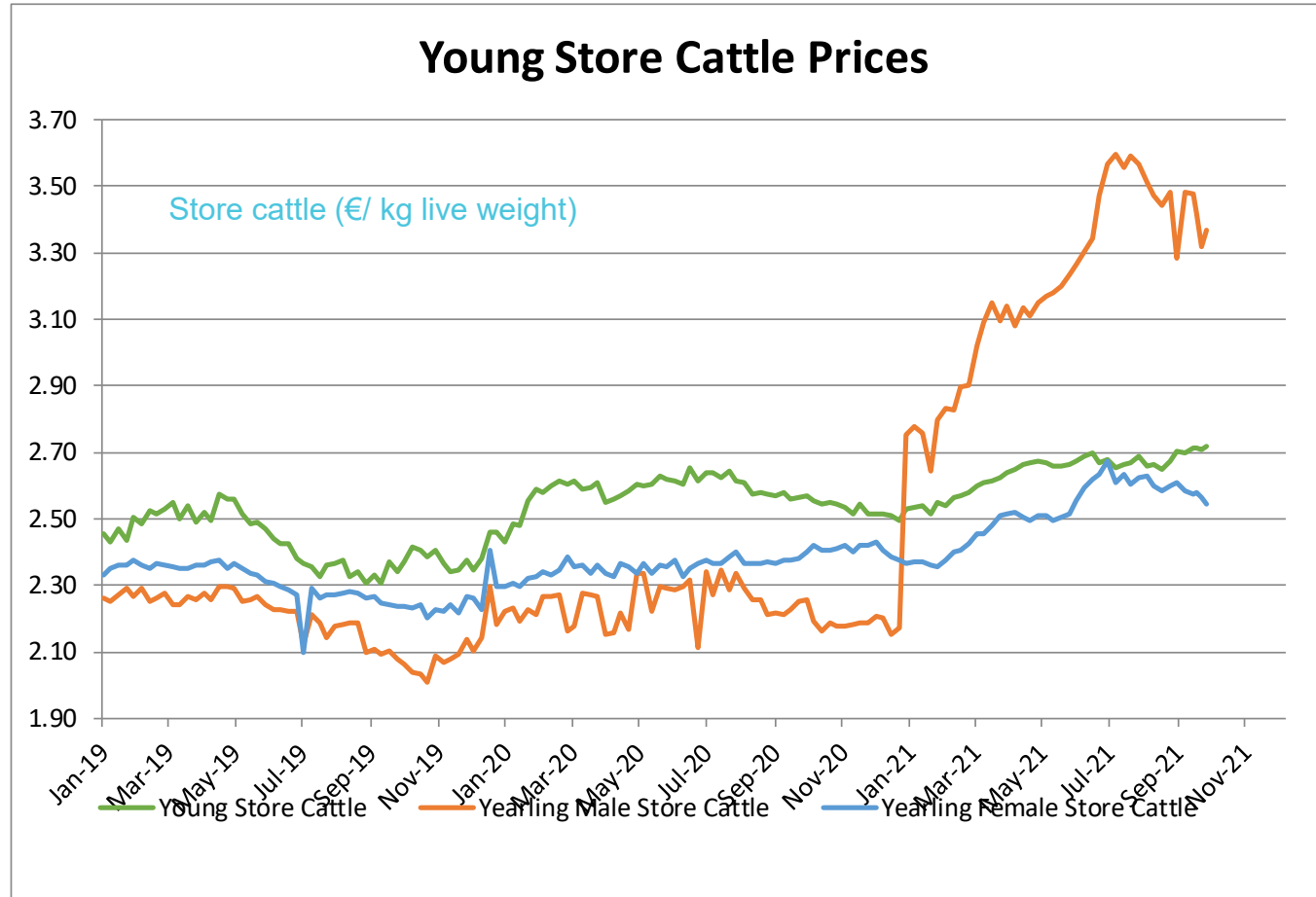
# PRICES CARCASSES

## EU EVOLUTION ALL CAT GLOBAL VIEW



# PRICES LIVE BOVINES

## EU EVOLUTION STORE CATTLE



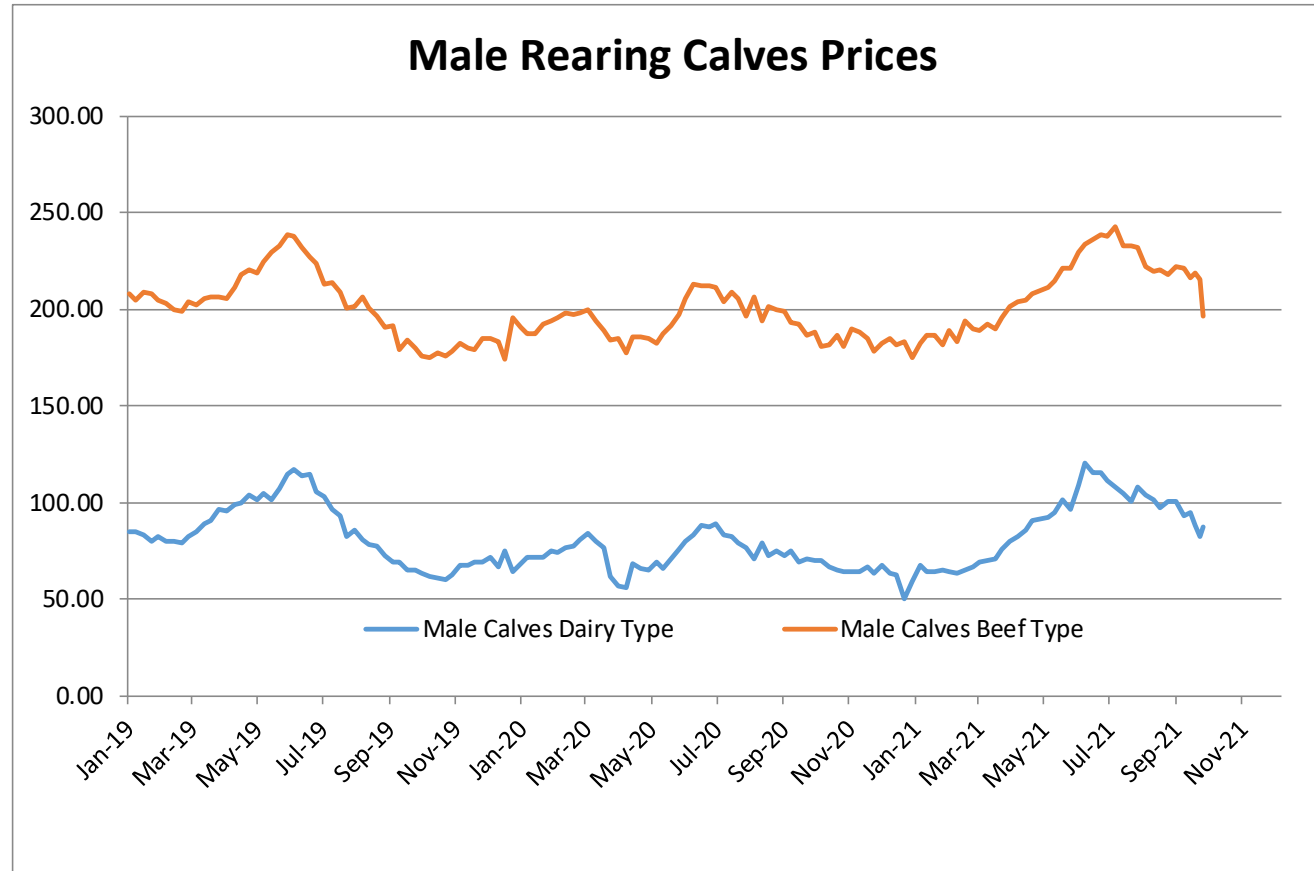
|   |                |             |   |             |
|---|----------------|-------------|---|-------------|
| <b>Young Store Cattle Price in</b>        | <b>Week 41</b> | <b>2.72</b> | <b>Yearling Male Store Cattle Price</b> | <b>3.37</b> |
|   | Change y/y     | +5.92%      | Change y/y                              | +49.16%     |
| <b>Yearling Female Store Cattle Price</b> |                | <b>2.55</b> |   |             |
|   | Change y/y     | +6.11%      |   |             |



# PRICES LIVE BOVINES

## EU EVOLUTION Male Calves – 8D4W

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



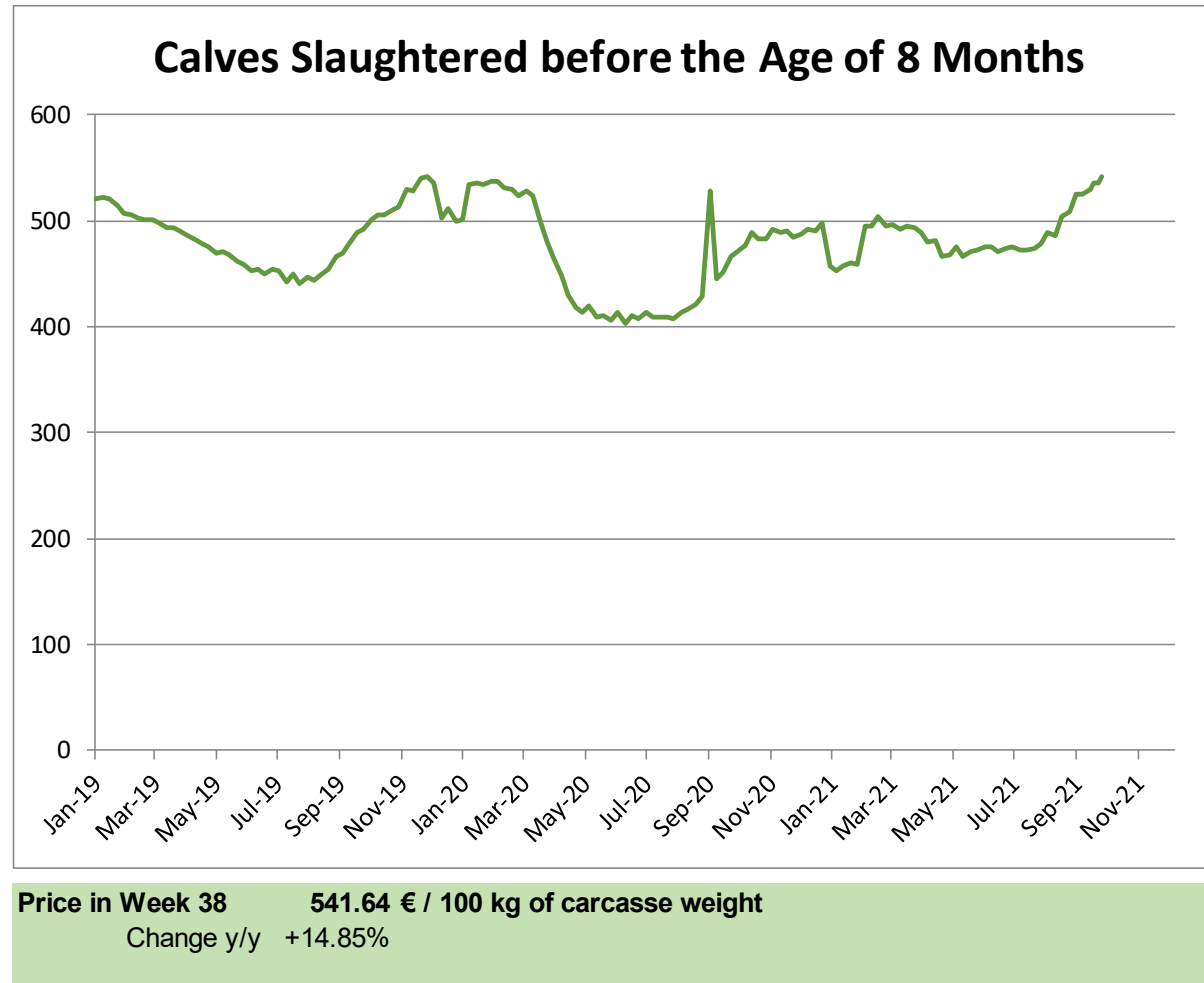
| Male Rearing Calves Beef type |        | Male Rearing Calves Dairy type |         |
|-------------------------------|--------|--------------------------------|---------|
| Price in Week 41              | 196.59 | Price in Week 41               | 87.83   |
| Change y/y                    | +4.28% | Change y/y                     | +25.66% |

21 October 2021

# PRICES LIVE BOVINES

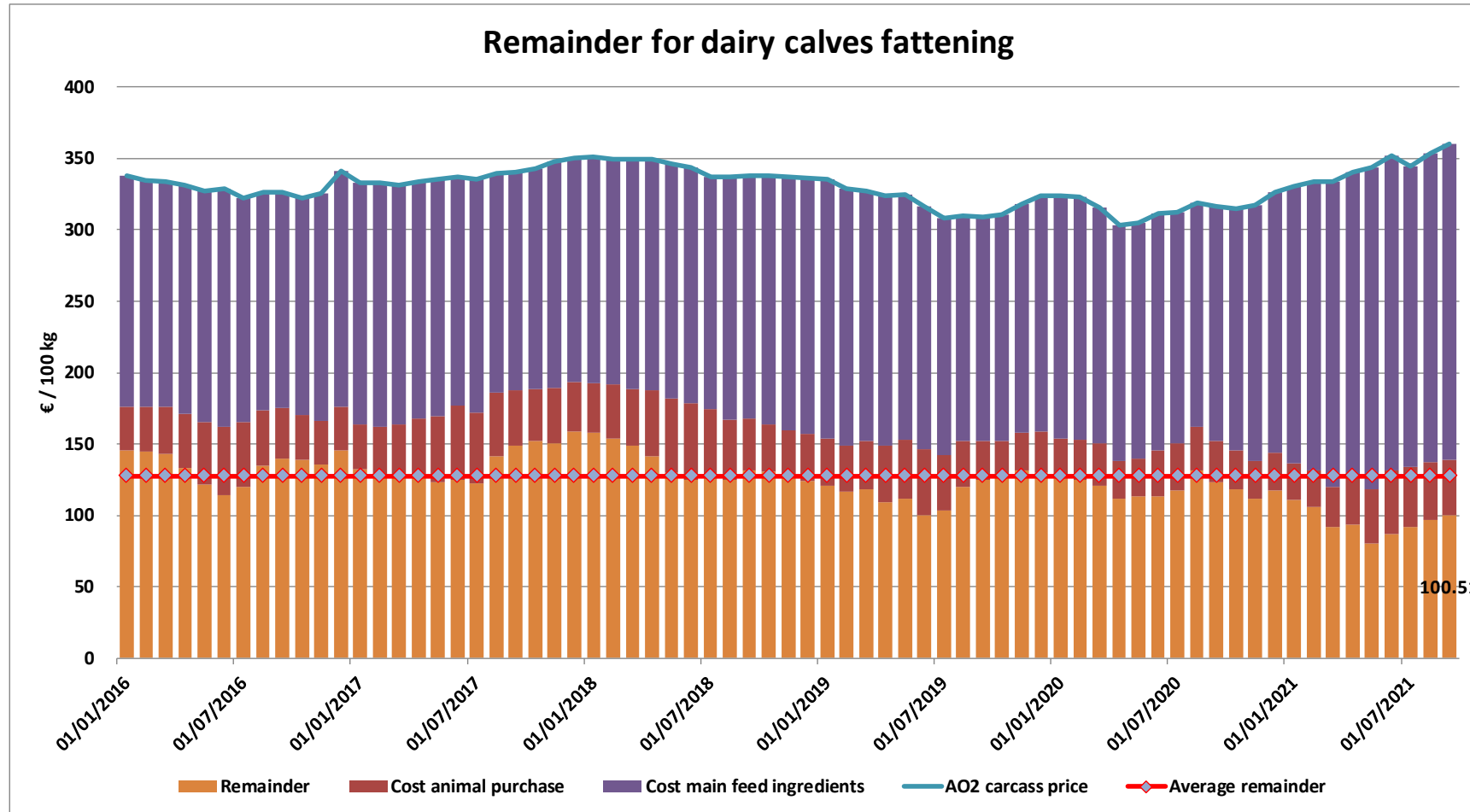
## EU EVOLUTION Butcher Calves

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

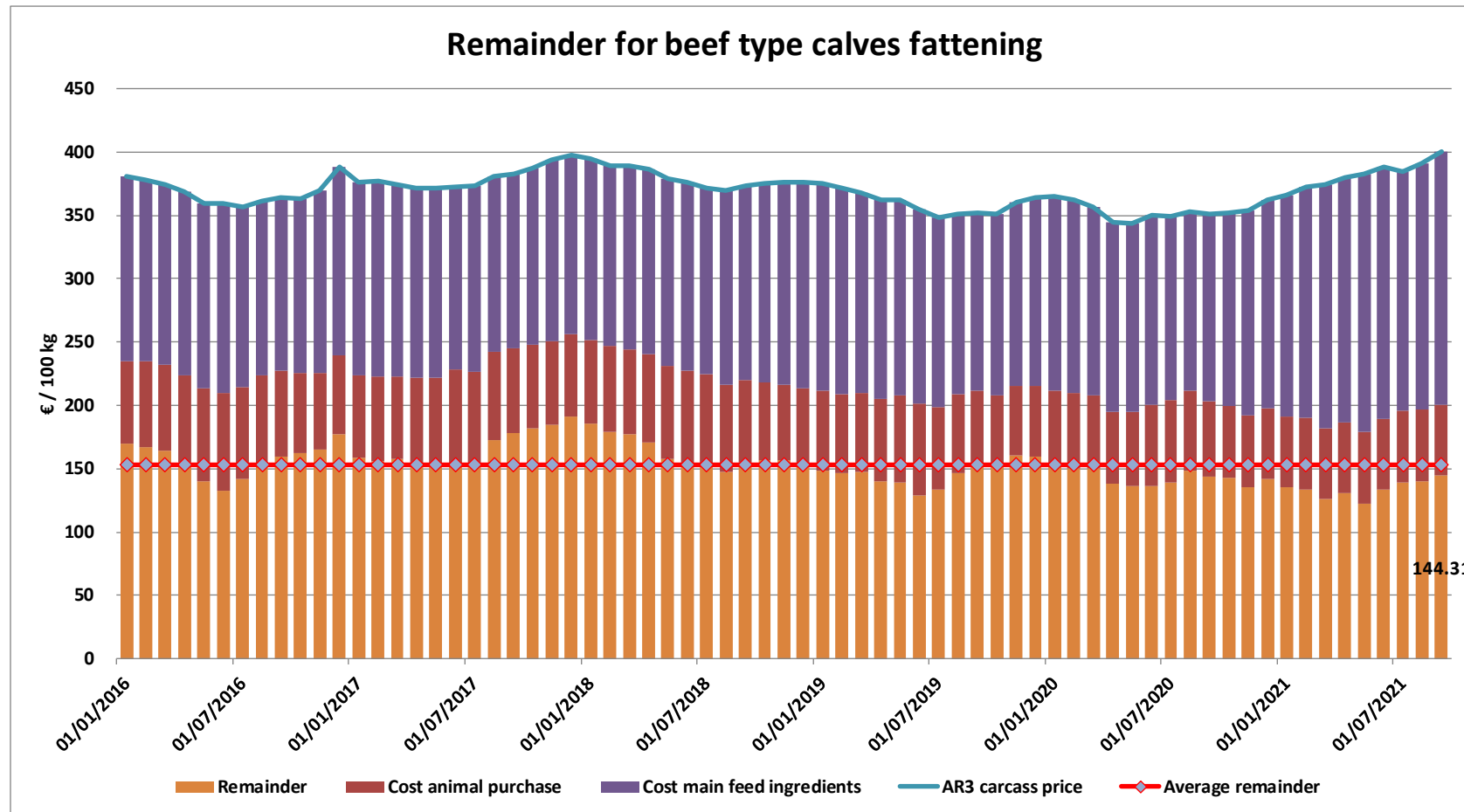


21 October 2021

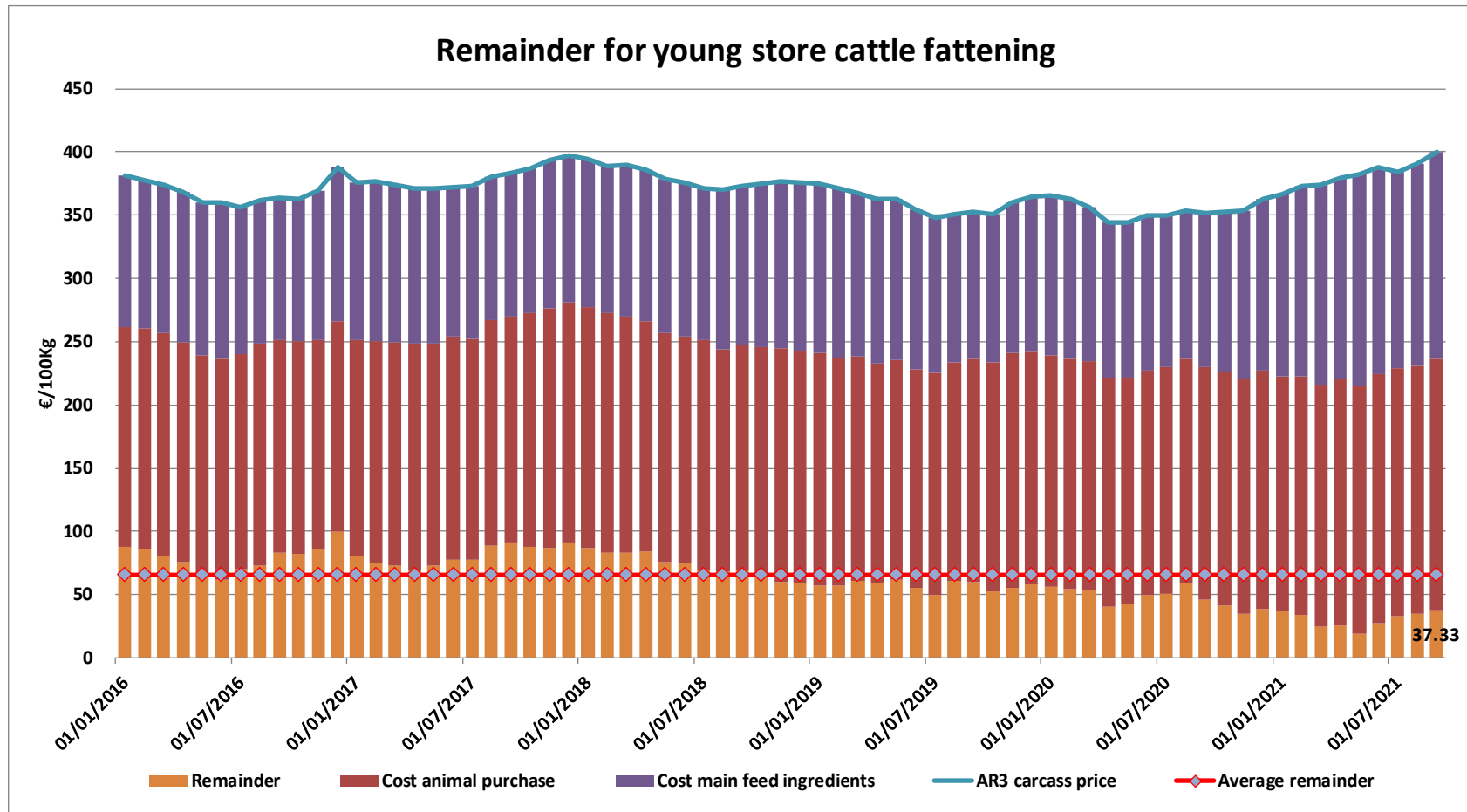
# REMAINDERS



# REMAINDERS



# REMAINDERS



# Forecast Summary

|                                   | 2019                 | 2020                 | 2021                 | 2022                 |
|-----------------------------------|----------------------|----------------------|----------------------|----------------------|
| <b>EU PRODUCTION</b><br>( 1000T ) | - 1.46% <b>6 908</b> | - 1.53% <b>6 822</b> | - 1.12% <b>6 783</b> | - 1.44% <b>6 690</b> |
| <b>CONSUMPTION</b><br>( 1000T )   | + 1.22% <b>6 650</b> | - 1.72% <b>6 543</b> | - 1.01% <b>6 496</b> | - 0.11% <b>6 497</b> |
| <b>BALANCE</b>                    | <b>258</b>           | <b>279</b>           | <b>286</b>           | <b>193</b>           |

## Provisional Results of Beef Forecast Working Group - October 2021

A. Production Figures before 2021 provided by Eurostat, All Other Figures provided by MS

### NET BEEF and VEAL PRODUCTION in EU

| ( 1000 T )  | BE    | BG     | CZ    | DK    | DE     | EE    | GR     | ES    | FR     | IE    | HR    | IT    | CY     | LV    | LT    | LU    | HU    | MT     | NL    | AT    | PL     | PT    | RO     | SI    | SK      | FI    | SE    | E<br>available |
|-------------|-------|--------|-------|-------|--------|-------|--------|-------|--------|-------|-------|-------|--------|-------|-------|-------|-------|--------|-------|-------|--------|-------|--------|-------|---------|-------|-------|----------------|
| <b>2017</b> | 281.5 | 7.4    | 67.7  | 124.0 | 1124.0 | 9.0   | 44.1   | 643.9 | 1442.2 | 617.0 | 42.2  | 756.4 | 8.3    | 16.8  | 40.9  | 9.5   | 27.2  | 1.1    | 438.9 | 226.1 | 558.6  | 91.1  | 59.1   | 35.8  | 7.8     | 85.4  | 132.1 | <b>6898</b>    |
| Var         | 3.2   | 0.8    | -4.2  | -5.4  | -24.0  | -0.4  | 3.9    | 6.9   | -22.0  | 28.7  | -2.2  | -53.2 | 1.3    | -0.9  | -1.4  | 0.1   | -0.9  | 0.0    | 22.8  | -1.3  | 57.1   | 0.0   | 1.6    | 0.1   | -0.5    | -1.0  | 0.8   |                |
| Var %       | +1.1% | +11.7% | -5.9% | -4.2% | -2.1%  | -4.6% | +9.8%  | +1.1% | -1.5%  | +4.9% | -5.0% | -6.6% | +18.0% | -5.4% | -3.3% | +1.3% | -3.1% | -2.6%  | +5.5% | -0.6% | +11.4% | -0.0% | +2.8%  | +0.4% | -6.0%   | -1.1% | +0.6% |                |
| <b>2018</b> | 277.3 | 7.2    | 71.6  | 129.2 | 1102.0 | 8.6   | 39.6   | 669.0 | 1460.0 | 622.5 | 43.8  | 809.2 | 5.3    | 15.9  | 40.3  | 9.9   | 29.2  | 1.1    | 459.2 | 233.5 | 564.7  | 93.8  | 49.9   | 34.9  | 8.1     | 86.5  | 136.9 | <b>7009</b>    |
| Var         | -4.2  | -0.2   | 3.9   | 5.2   | -22.0  | -0.4  | -4.5   | 25.2  | 17.8   | 5.5   | 1.6   | 52.8  | -3.0   | -0.9  | -0.6  | 0.3   | 1.9   | -0.1   | 20.3  | 7.4   | 6.1    | 2.7   | -9.2   | -0.9  | 0.3     | 1.1   | 4.8   |                |
| Var %       | -1.5% | -3.0%  | +6.7% | +4.2% | -2.0%  | -4.9% | -10.2% | +3.9% | +1.2%  | +0.9% | +3.7% | +7.0% | -36.5% | -5.3% | -1.5% | +3.5% | +7.1% | -4.5%  | +4.6% | +3.3% | +1.1%  | +3.0% | -15.6% | -2.6% | +4.1%   | +1.3% | +3.6% |                |
| <b>2019</b> | 263.8 | 5.5    | 72.9  | 124.6 | 1106.0 | 8.6   | 33.5   | 695.2 | 1428.5 | 619.8 | 45.4  | 779.8 | 5.6    | 14.8  | 42.5  | 10.2  | 29.7  | 1.0    | 424.3 | 229.6 | 560.5  | 92.0  | 43.5   | 35.7  | 8.3     | 87.2  | 139.7 | <b>6908</b>    |
| Var         | -13.6 | -1.7   | 1.3   | -4.6  | 4.0    | 0.0   | -6.2   | 26.2  | -31.5  | -2.7  | 1.7   | -29.4 | 0.3    | -1.1  | 2.2   | 0.3   | 0.6   | 0.0    | -34.9 | -3.8  | -4.3   | -1.8  | -6.4   | 0.9   | 0.2     | 0.7   | 2.8   |                |
| Var %       | -4.9% | -24.1% | +1.8% | -3.6% | +0.4%  | +0.1% | -15.6% | +3.9% | -2.2%  | -0.4% | +3.8% | -3.6% | +6.3%  | -6.9% | +5.4% | +3.0% | +2.0% | -3.7%  | -7.6% | -1.6% | -0.8%  | -1.9% | -12.8% | +2.5% | +2.0%   | +0.8% | +2.0% |                |
| <b>2020</b> | 254.5 | 6.2    | 72.5  | 121.2 | 1090.0 | 8.9   | 34.7   | 677.7 | 1434.6 | 633.4 | 43.4  | 732.3 | 4.6    | 14.5  | 41.7  | 10.3  | 28.1  | 1.1    | 432.8 | 218.4 | 559.4  | 97.8  | 32.2   | 36.5  | 7.9     | 86.5  | 141.0 | <b>6822</b>    |
| Var         | -9.2  | 0.8    | -0.4  | -3.4  | -16.0  | 0.3   | 1.3    | -17.4 | 6.1    | 13.6  | -2.1  | -47.5 | -1.0   | -0.3  | -0.7  | 0.1   | -1.7  | 0.1    | 8.5   | -11.3 | -1.1   | 5.8   | -11.4  | 0.8   | -0.3    | -0.7  | 1.3   |                |
| Var %       | -3.5% | +13.9% | -0.5% | -2.7% | -1.4%  | +3.7% | +3.8%  | -2.5% | +0.4%  | +2.2% | -4.5% | -6.1% | -17.3% | -1.8% | -1.7% | +0.8% | -5.6% | +10.7% | +2.0% | -4.9% | -0.2%  | +6.2% | -26.1% | +2.1% | -4.1%   | -0.7% | +1.0% |                |
| <b>2021</b> | 245.0 | 6.7    | 71.7  | 123.3 | 1094.0 |       | 43.2   | 680.0 | 1426.0 | 579.0 | 45.0  | 743.0 |        |       |       |       | 30.0  |        | 425.3 | 216.0 | 565.0  | 102.4 |        | 37.3  | 26.8    | 84.4  | 135.0 | <b>6679</b>    |
| Var         | -9.5  | 0.5    | -0.8  | 2.1   | 4.0    |       | 8.4    | 2.3   | -8.6   | -54.4 | 1.6   | 10.7  |        |       |       |       | 1.9   |        | -7.5  | -2.4  | 5.6    | 4.7   |        | 0.8   | 18.9    | -2.1  | -6.0  |                |
| Var %       | -3.7% | +7.4%  | -1.1% | +1.7% | +0.4%  |       | +24.2% | +0.3% | -0.6%  | -8.6% | +3.8% | +1.5% |        |       |       |       | +6.9% |        | -1.7% | -1.1% | +1.0%  | +4.8% |        | +2.2% | +238.0% | -2.5% | -4.3% |                |
| <b>2022</b> | 245.0 | 6.9    | 72.0  | 125.0 | 1039.0 |       |        | 670.0 | 1395.0 | 615.0 | 41.0  | 740.0 |        |       |       |       | 32.0  |        | 409.9 | 212.0 | 560.0  | 98.2  |        | 37.9  |         | 83.0  | 137.0 | <b>6519</b>    |
| Var         | 0.0   | 0.2    | 0.3   | 1.7   | -55.0  |       |        | -10.0 | -31.0  | 36.0  | -4.0  | -3.0  |        |       |       |       | 2.0   |        | -15.4 | -4.0  | -5.0   | -4.2  |        | 0.6   |         | -1.4  | 2.0   |                |
| Var %       | idem  | +3.0%  | +0.4% | +1.4% | -5.0%  |       |        | -1.5% | -2.2%  | +6.2% | -8.9% | -0.4% |        |       |       |       | +6.7% |        | -3.6% | -1.9% | -0.9%  | -4.1% |        | +1.6% |         | -1.7% | +1.5% |                |

Sources : 2012 & 2013 from Estat NewCronos, 2014 & 2015 from Member States

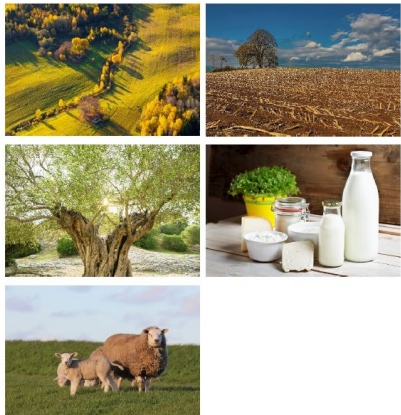
XX : Member States who have communicated figures

# Short term Outlook – Autumn 2021



## SHORT-TERM OUTLOOK

for EU agricultural markets  
in 2021



Agriculture  
and Rural  
Development

AUTUMN 2021

Edition N°31

- EU beef production is expected to decrease moderately in 2021
- Due to higher feed prices, additional slaughtering can be expected in the second half of 2021. Moreover, the gradually improving economic situation and the current favorable prices in the EU will limit further decline in beef production, at only -0.5% in 2021, before resuming its downward trend in 2022 (-0.9%)
- The declining development of apparent consumption may continue in 2021 (-0.6%), despite the expected recovery of demand in the second half of 2021

# TRADE

# EU EXPORTS

## Beef & Live Animals

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

| Destinations              | 2017           |              | 2018           |              | 2019           |              | 2020           |              | Jan-Aug 21     |              | Compared to |
|---------------------------|----------------|--------------|----------------|--------------|----------------|--------------|----------------|--------------|----------------|--------------|-------------|
|                           | tonnes         | %            | tonnes         | %            | tonnes         | %            | tonnes         | %            | tonnes         | %            |             |
| Israel                    | 44 196         | 6.1%         | 47 774         | 6.8%         | 49 629         | 7.1%         | 56 974         | 8.1%         | 46 249         | 9.8%         | + 27.5%     |
| Hong Kong                 | 76 086         | 10.5%        | 55 537         | 7.9%         | 46 748         | 6.7%         | 56 860         | 8.1%         | 34 082         | 7.2%         | + 1.4%      |
| Ghana                     | 37 744         | 5.2%         | 36 766         | 5.2%         | 39 196         | 5.6%         | 47 408         | 6.7%         | 33 013         | 7.0%         | + 8.4%      |
| Philippines               | 37 102         | 5.1%         | 28 766         | 4.1%         | 34 158         | 4.9%         | 39 920         | 5.7%         | 31 087         | 6.6%         | + 16.9%     |
| Bosnia-Herz.              | 34 711         | 4.8%         | 38 762         | 5.5%         | 41 119         | 5.9%         | 35 758         | 5.1%         | 26 966         | 5.7%         | + 19.6%     |
| Switzerland               | 26 708         | 3.7%         | 23 761         | 3.4%         | 25 188         | 3.6%         | 29 996         | 4.3%         | 22 282         | 4.7%         | + 14.5%     |
| Ivory Coast               | 36 038         | 5.0%         | 36 064         | 5.1%         | 33 396         | 4.8%         | 32 460         | 4.6%         | 21 276         | 4.5%         | - 4.5%      |
| Algeria                   | 26 305         | 3.6%         | 35 410         | 5.0%         | 57 152         | 8.2%         | 39 416         | 5.6%         | 18 617         | 3.9%         | - 28.6%     |
| Lebanon                   | 38 322         | 5.3%         | 42 542         | 6.1%         | 36 393         | 5.2%         | 33 656         | 4.8%         | 15 151         | 3.2%         | - 18.9%     |
| Norway                    | 12 850         | 1.8%         | 7 925          | 1.1%         | 7 667          | 1.1%         | 12 936         | 1.8%         | 14 629         | 3.1%         | + 67.6%     |
| Japan                     | 4 281          | 0.6%         | 3 452          | 0.5%         | 8 007          | 1.1%         | 11 885         | 1.7%         | 13 614         | 2.9%         | + 57.8%     |
| Libya                     | 27 848         | 3.8%         | 27 878         | 4.0%         | 24 541         | 3.5%         | 22 188         | 3.1%         | 12 784         | 2.7%         | - 20.4%     |
| Canada                    | 2 424          | 0.3%         | 2 225          | 0.3%         | 6 806          | 1.0%         | 20 475         | 2.9%         | 11 694         | 2.5%         | - 17.7%     |
| Kosovo                    | 6 377          | 0.9%         | 6 693          | 1.0%         | 10 279         | 1.5%         | 10 912         | 1.5%         | 10 882         | 2.3%         | + 75.4%     |
| Ukraine                   | 7 331          | 1.0%         | 10 465         | 1.5%         | 13 836         | 2.0%         | 15 857         | 2.3%         | 9 823          | 2.1%         | + 2.0%      |
| North Macedonia           | 9 627          | 1.3%         | 10 191         | 1.5%         | 11 975         | 1.7%         | 10 686         | 1.5%         | 9 080          | 1.9%         | + 34.6%     |
| <i>Other Destinations</i> | <i>299 571</i> | <i>41.2%</i> | <i>287 670</i> | <i>41.0%</i> | <i>254 155</i> | <i>36.3%</i> | <i>227 209</i> | <i>32.2%</i> | <i>142 104</i> | <i>30.0%</i> |             |
| <b>Total (without UK)</b> | <b>727 522</b> |              | <b>701 882</b> |              | <b>700 245</b> |              | <b>704 596</b> |              | <b>473 333</b> |              |             |
| % change                  |                |              | - 4%           |              | - 0%           |              | + 1%           |              | + 4.9%         |              |             |



# TRADE

# EU EXPORTS

## Beef

### EU Exports of Beef: Trade figures (COMEXT – tonnes cwe)

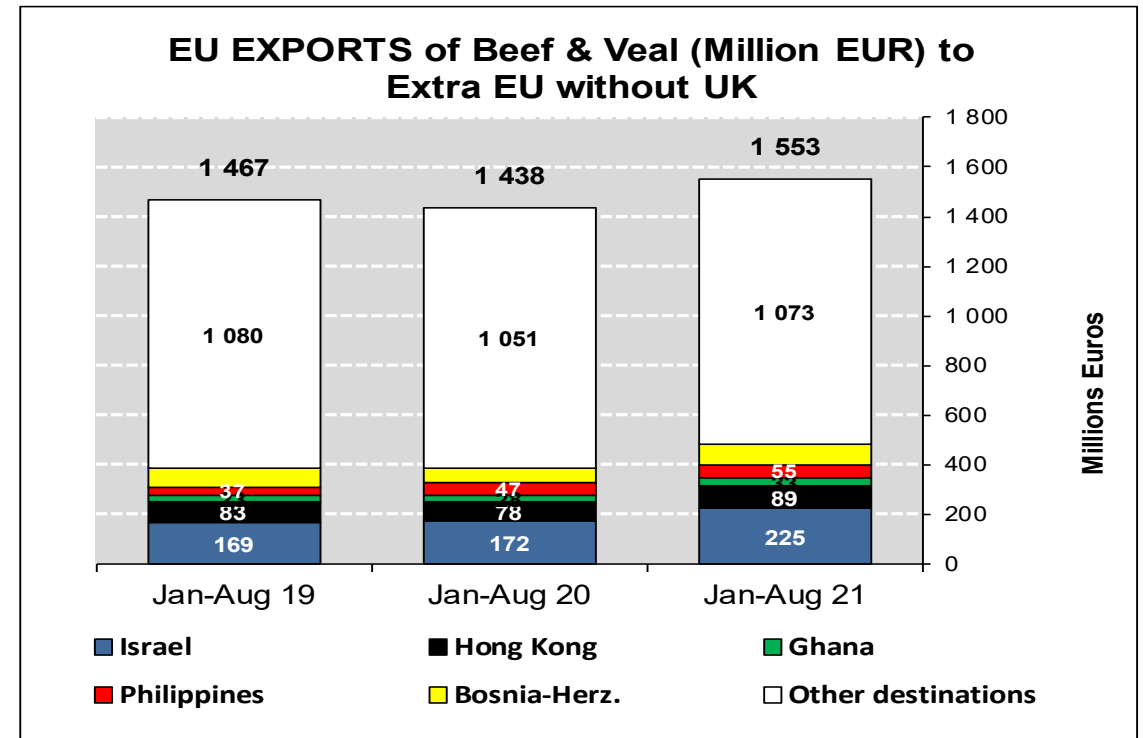
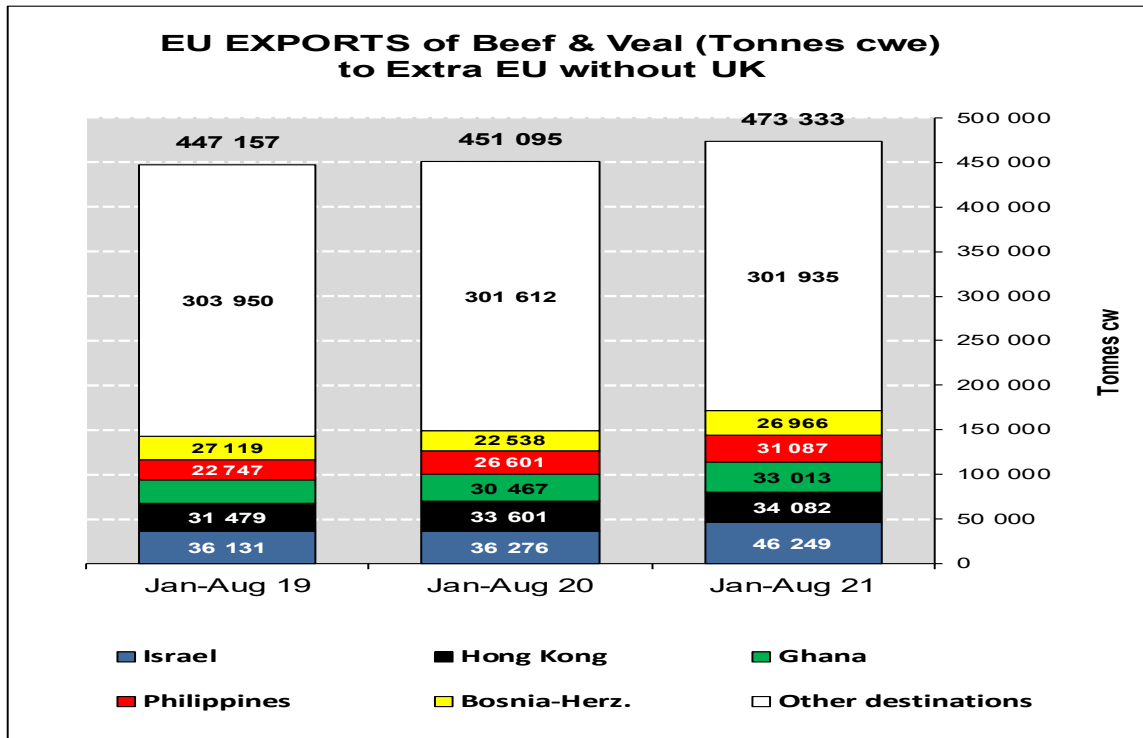
| Destinations              | 2017           |              | 2018           |              | 2019           |              | 2020           |              | Jan-Aug 21     |              | Compared to |
|---------------------------|----------------|--------------|----------------|--------------|----------------|--------------|----------------|--------------|----------------|--------------|-------------|
|                           | tonnes         | %            | tonnes         | %            | tonnes         | %            | tonnes         | %            | tonnes         | %            |             |
| Hong Kong                 | 76 086         | 15.5%        | 55 537         | 11.9%        | 46 748         | 9.8%         | 56 860         | 11.6%        | 34 082         | 10.0%        | + 1.4%      |
| Ghana                     | 37 744         | 7.7%         | 36 766         | 7.9%         | 39 196         | 8.2%         | 47 408         | 9.7%         | 33 013         | 9.7%         | + 8.4%      |
| Philippines               | 37 102         | 7.5%         | 28 766         | 6.2%         | 34 158         | 7.2%         | 39 920         | 8.1%         | 31 087         | 9.1%         | + 16.9%     |
| Bosnia-Herz.              | 32 181         | 6.5%         | 36 152         | 7.7%         | 38 806         | 8.2%         | 33 459         | 6.8%         | 25 249         | 7.4%         | + 18.7%     |
| Switzerland               | 25 570         | 5.2%         | 22 710         | 4.9%         | 24 110         | 5.1%         | 28 941         | 5.9%         | 21 333         | 6.3%         | + 14.1%     |
| Ivory Coast               | 36 028         | 7.3%         | 36 064         | 7.7%         | 33 396         | 7.0%         | 32 460         | 6.6%         | 21 276         | 6.2%         | - 4.5%      |
| Israel                    | 18 750         | 3.8%         | 22 163         | 4.7%         | 23 026         | 4.8%         | 21 967         | 4.5%         | 15 755         | 4.6%         | + 3.6%      |
| Norway                    | 12 849         | 2.6%         | 7 922          | 1.7%         | 7 667          | 1.6%         | 12 936         | 2.6%         | 14 629         | 4.3%         | + 67.6%     |
| Japan                     | 4 281          | 0.9%         | 3 452          | 0.7%         | 8 007          | 1.7%         | 11 885         | 2.4%         | 13 614         | 4.0%         | + 57.8%     |
| Canada                    | 2 424          | 0.5%         | 2 225          | 0.5%         | 6 806          | 1.4%         | 20 475         | 4.2%         | 11 694         | 3.4%         | - 17.7%     |
| Ukraine                   | 6 926          | 1.4%         | 9 887          | 2.1%         | 12 893         | 2.7%         | 14 861         | 3.0%         | 9 173          | 2.7%         | + 2.0%      |
| North Macedonia           | 11 285         | 2.3%         | 10 002         | 2.1%         | 11 395         | 2.4%         | 10 551         | 2.1%         | 8 995          | 2.6%         | + 36.1%     |
| USA                       | 3 756          | 0.8%         | 5 458          | 1.2%         | 7 867          | 1.7%         | 12 310         | 2.5%         | 8 152          | 2.4%         | + 8.0%      |
| South Africa              | 4 555          | 0.9%         | 7 214          | 1.5%         | 5 442          | 1.1%         | 7 743          | 1.6%         | 7 115          | 2.1%         | + 70.1%     |
| Vietnam                   | 12 146         | 2.5%         | 8 163          | 1.7%         | 10 014         | 2.1%         | 6 367          | 1.3%         | 4 990          | 1.5%         | + 20.9%     |
| Angola                    | 10 982         | 2.2%         | 11 470         | 2.5%         | 8 410          | 1.8%         | 9 391          | 1.9%         | 4 508          | 1.3%         | - 17.8%     |
| <i>Other Destinations</i> | <i>159 714</i> | <i>32.4%</i> | <i>162 871</i> | <i>34.9%</i> | <i>157 379</i> | <i>33.1%</i> | <i>123 328</i> | <i>25.1%</i> | <i>76 506</i>  | <i>22.4%</i> |             |
| <b>Total (without UK)</b> | <b>492 379</b> |              | <b>466 823</b> |              | <b>475 318</b> |              | <b>490 862</b> |              | <b>341 170</b> |              |             |
| % change                  |                |              | - 5%           |              | + 2%           |              | + 3%           |              | + 5.9%         |              |             |

# TRADE

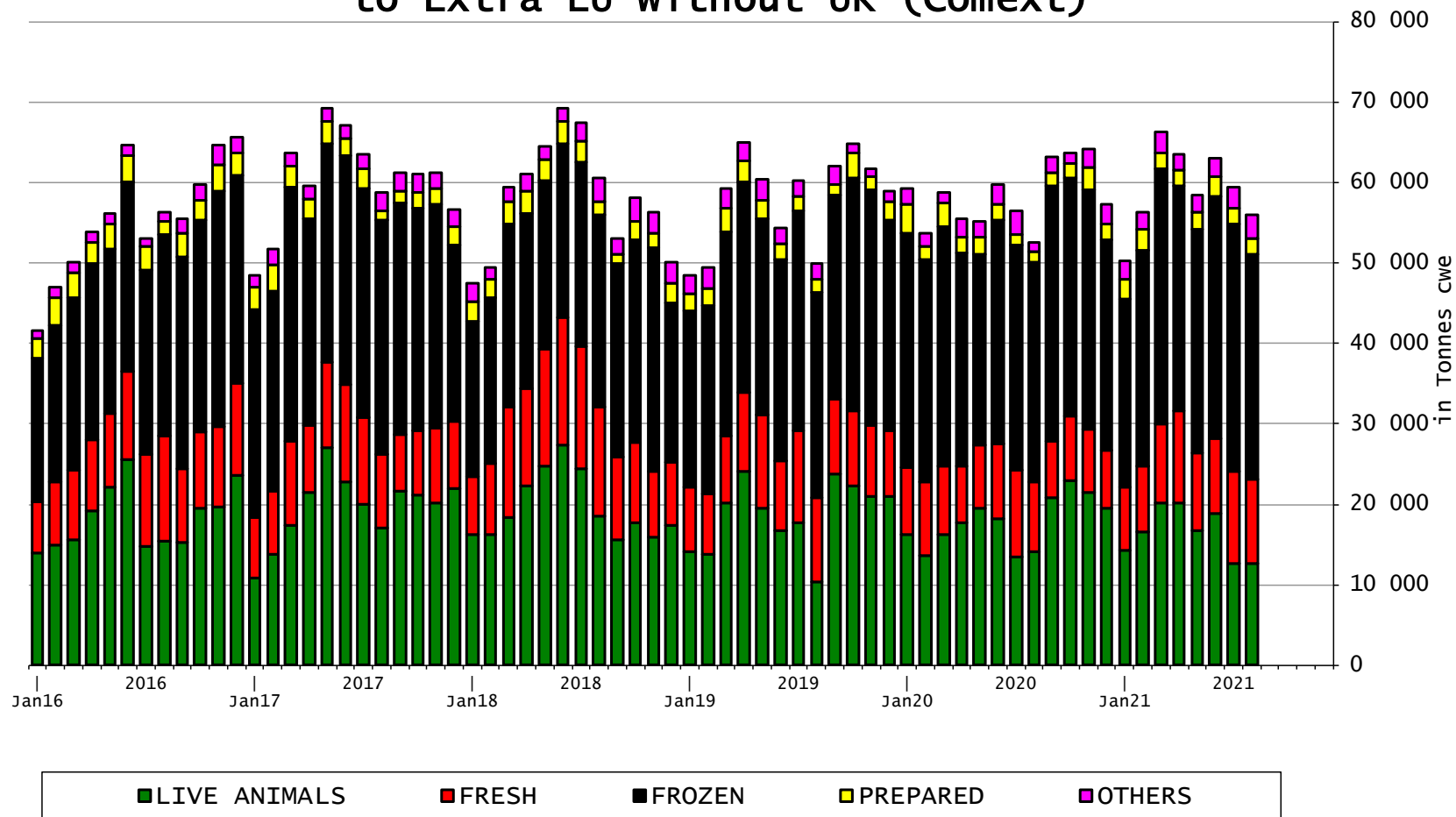
## EU Exports of Beef and Live Animals: Trade figures (COMEXT)

# EU EXPORTS

## Beef & Live Animals

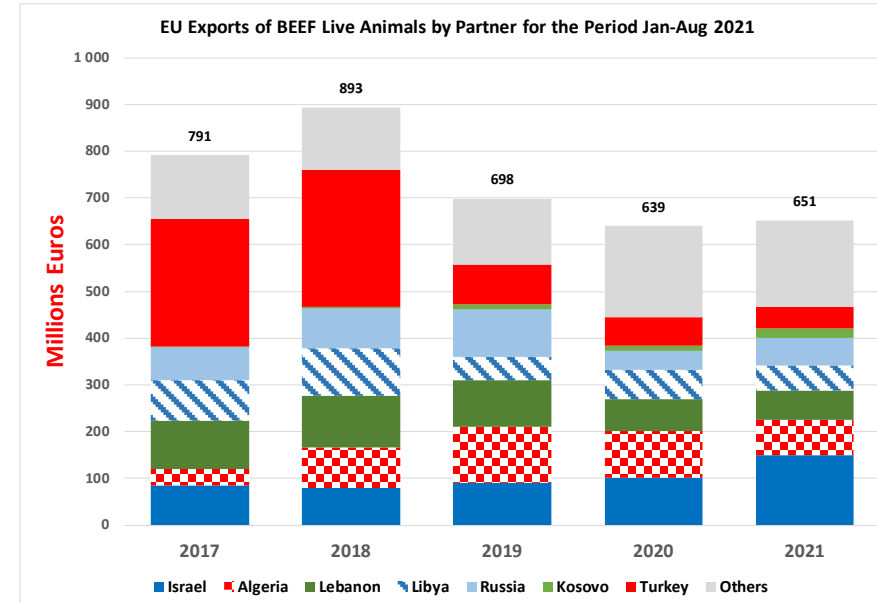
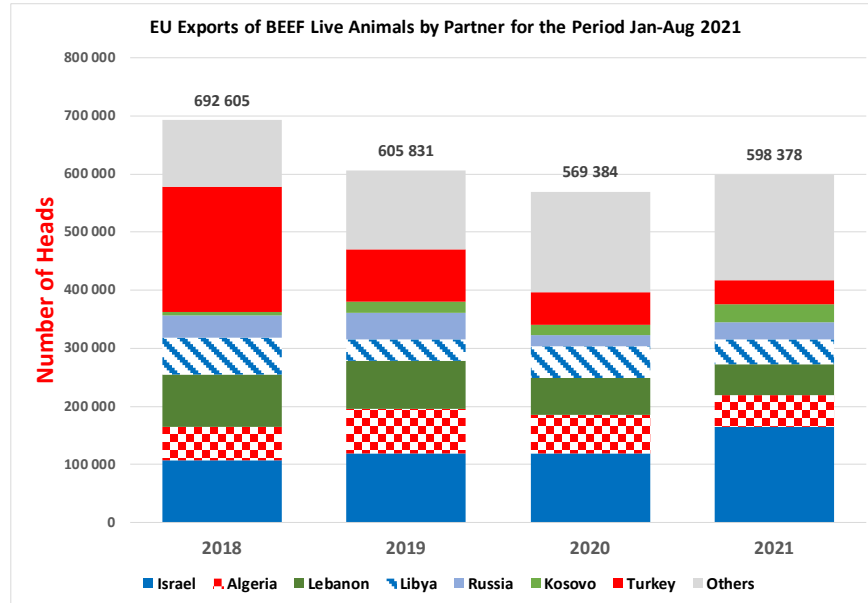


### EU Exports of BEEF products to Extra EU without UK (Comext)



# TRADE

# EU EXPORTS Live Animals



# TRADE

## EU IMPORTS Beef & Live Animals

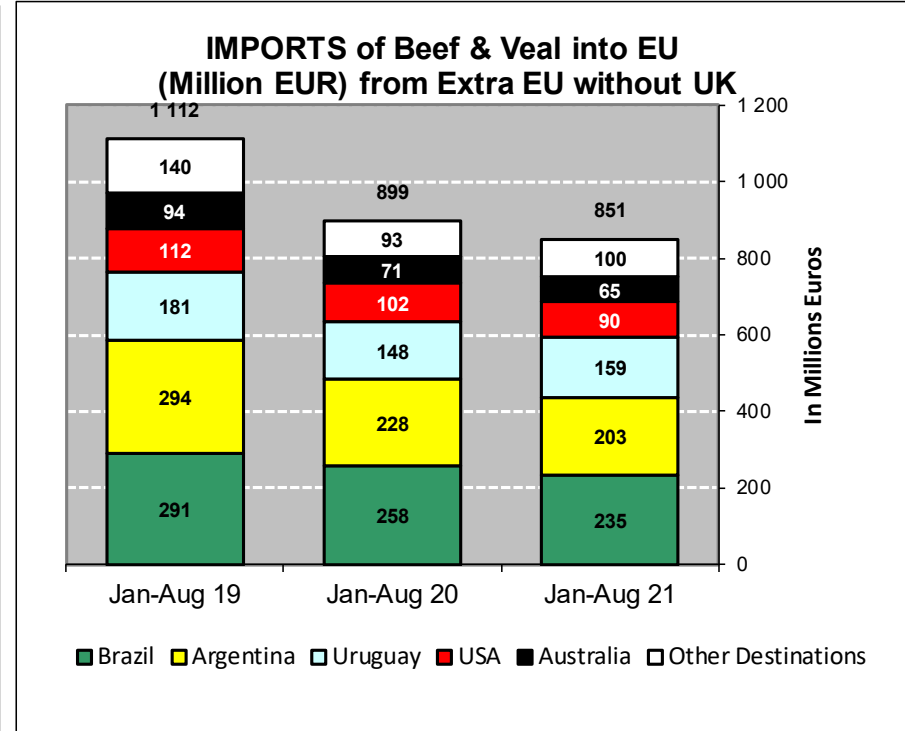
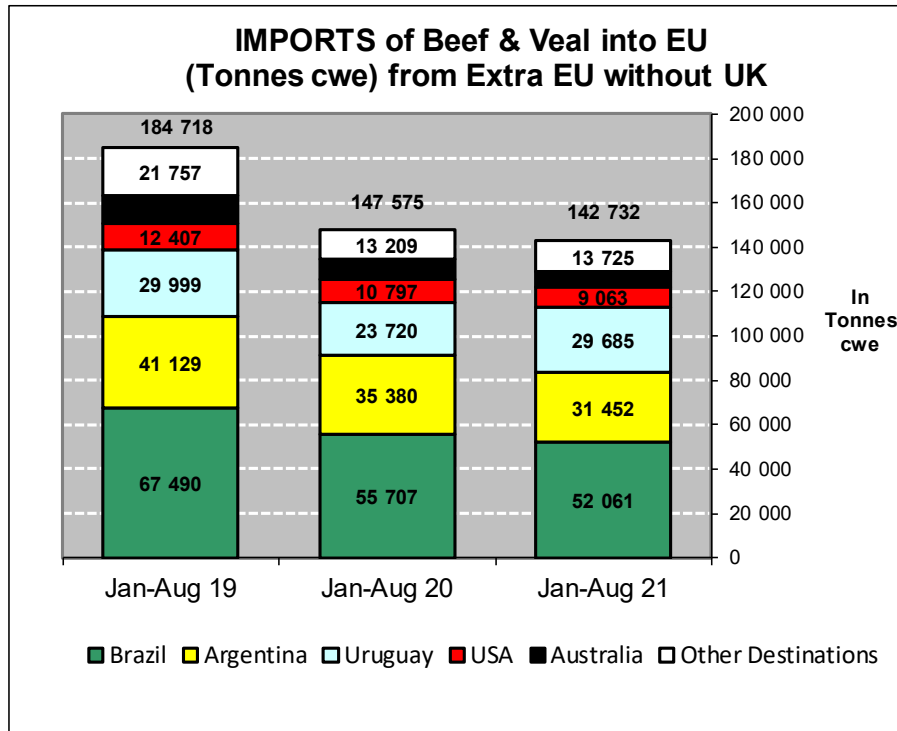
### EU Imports of Beef and Live Animals (1): Trade Figures (COMEXT – tonnes cwe)

| Origins                   | 2017           |             | 2018           |             | 2019           |             | 2020           |             | Jan-Aug 21     |             | Compared to |
|---------------------------|----------------|-------------|----------------|-------------|----------------|-------------|----------------|-------------|----------------|-------------|-------------|
|                           | tonnes         | %           | tonnes         | %           | tonnes         | %           | tonnes         | %           | tonnes         | %           |             |
| Brazil                    | 86 927         | 33.9%       | 103 979        | 37.3%       | 99 569         | 36.4%       | 84 172         | 37.6%       | 52 061         | 36.5%       | - 6.5%      |
| Argentina                 | 49 259         | 19.2%       | 61 400         | 22.0%       | 65 324         | 23.9%       | 56 421         | 25.2%       | 31 452         | 22.0%       | - 11.1%     |
| Uruguay                   | 52 078         | 20.3%       | 47 922         | 17.2%       | 40 483         | 14.8%       | 34 595         | 15.5%       | 29 685         | 20.8%       | + 25.1%     |
| USA                       | 21 624         | 8.4%        | 19 268         | 6.9%        | 16 852         | 6.2%        | 16 532         | 7.4%        | 9 063          | 6.3%        | - 16.1%     |
| Australia                 | 18 193         | 7.1%        | 17 368         | 6.2%        | 16 516         | 6.0%        | 11 058         | 4.9%        | 6 746          | 4.7%        | - 23.0%     |
| Switzerland               | 5 105          | 2.0%        | 5 413          | 1.9%        | 4 401          | 1.6%        | 4 197          | 1.9%        | 2 945          | 2.1%        | + 12.1%     |
| New Zealand               | 6 806          | 2.7%        | 7 165          | 2.6%        | 6 726          | 2.5%        | 6 145          | 2.7%        | 2 844          | 2.0%        | - 28.9%     |
| Paraguay                  | 5 922          | 2.3%        | 5 520          | 2.0%        | 5 203          | 1.9%        | 4 234          | 1.9%        | 2 419          | 1.7%        | - 14.2%     |
| N.det.Extra               | 72             | 0.0%        | 127            | 0.0%        | 196            | 0.1%        | 94             | 0.0%        | 1 339          | 0.9%        | +++         |
| Canada                    | 512            | 0.2%        | 1 343          | 0.5%        | 2 518          | 0.9%        | 1 550          | 0.7%        | 1 093          | 0.8%        | + 80.7%     |
| Japan                     | 645            | 0.3%        | 791            | 0.3%        | 997            | 0.4%        | 789            | 0.4%        | 807            | 0.6%        | + 86.1%     |
| Namibia                   | 5 043          | 2.0%        | 3 442          | 1.2%        | 7 706          | 2.8%        | 1 445          | 0.6%        | 675            | 0.5%        | - 36.4%     |
| Serbia                    | 565            | 0.2%        | 1 134          | 0.4%        | 1 062          | 0.4%        | 931            | 0.4%        | 607            | 0.4%        | + 0.6%      |
| Norway                    | 388            | 0.2%        | 153            | 0.1%        | 129            | 0.0%        | 336            | 0.2%        | 321            | 0.2%        | +++         |
| Botswana                  | 2 686          | 1.0%        | 3 119          | 1.1%        | 4 950          | 1.8%        | 788            | 0.4%        | 249            | 0.2%        | - 56.3%     |
| Chile                     | 319            | 0.1%        | 356            | 0.1%        | 392            | 0.1%        | 168            | 0.1%        | 125            | 0.1%        | + 10.8%     |
| <i>Other Destinations</i> | <i>579</i>     | <i>0.2%</i> | <i>318</i>     | <i>0.1%</i> | <i>287</i>     | <i>0.1%</i> | <i>298</i>     | <i>0.1%</i> | <i>302</i>     | <i>0.2%</i> |             |
| <b>Total (without UK)</b> | <b>256 724</b> |             | <b>278 818</b> |             | <b>273 312</b> |             | <b>223 752</b> |             | <b>142 732</b> |             |             |
| % change                  |                |             | + 9%           |             | - 2%           |             | - 18%          |             | - 3.3%         |             |             |

# TRADE

## EU Imports of Beef and Live Animals (2): Trade Figures (COMEXT)

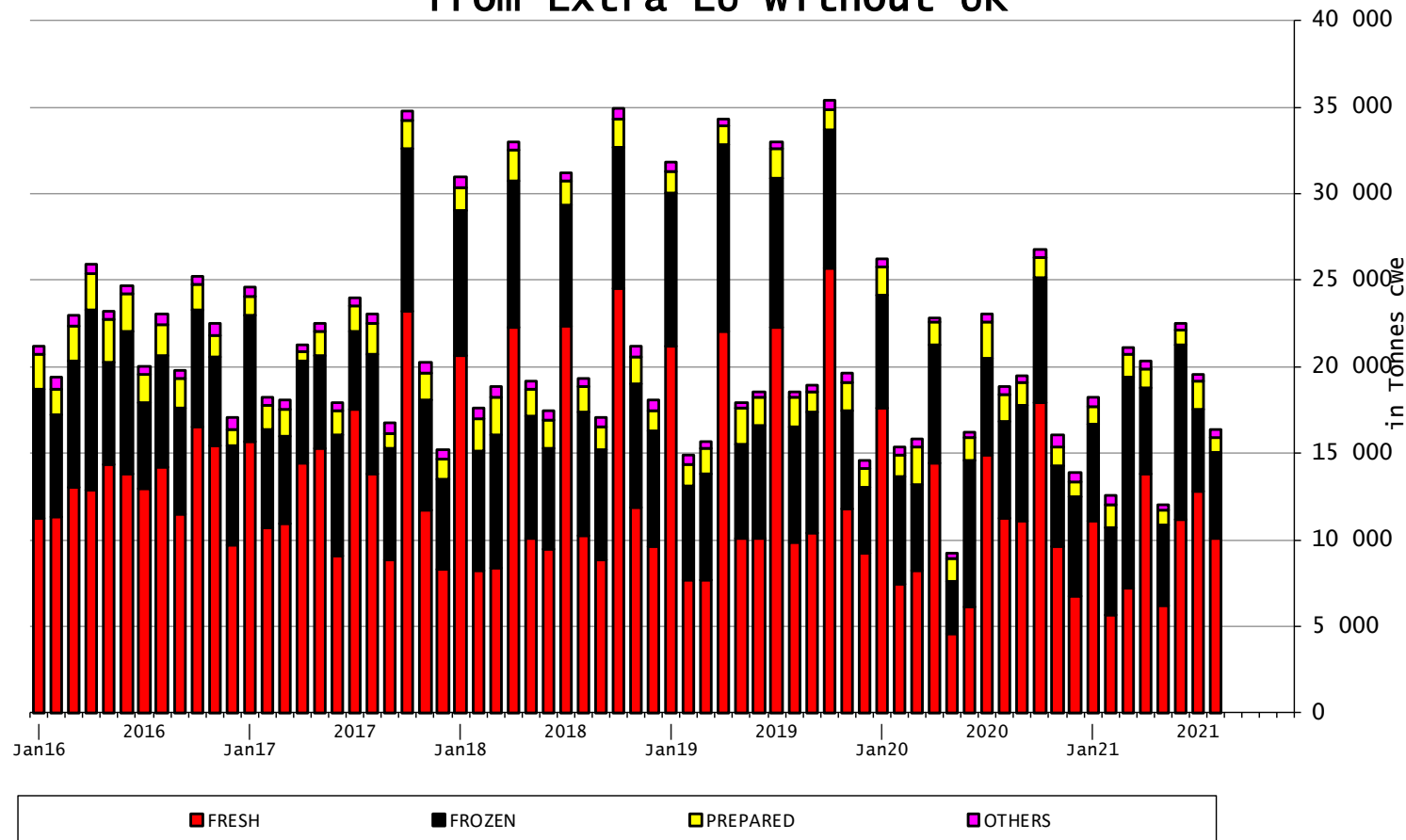
## EU IMPORTS Beef & Live Animals



# TRADE

## EU IMPORTS Beef Products

### EU Imports of BEEF products from Extra EU without UK



21 October 2021

# EU TRADE with UK

## EU EXPORTS Beef Products

### EU Export of BEEF to UK by Products from Jan to Jul

*In Tons of Carcase Weight*

|                     | 2019           |                |              | 2020           |                |              | 2021           |                |              | % 2021/2020    |              |
|---------------------|----------------|----------------|--------------|----------------|----------------|--------------|----------------|----------------|--------------|----------------|--------------|
|                     | United Kingdom | Extra-EU       | %            | United Kingdom | Extra-EU       | %            | United Kingdom | Extra-EU       | %            | United Kingdom | Extra-EU     |
| <b>Live Animals</b> | <b>6 106</b>   | <b>132 454</b> | <b>4.6%</b>  | <b>8 325</b>   | <b>123 240</b> | <b>6.8%</b>  | <b>7 665</b>   | <b>127 153</b> | <b>6.0%</b>  | <b>-7.9%</b>   | <b>+3.2%</b> |
| <b>Meats</b>        | <b>249 042</b> | <b>519 942</b> | <b>47.9%</b> | <b>221 779</b> | <b>505 379</b> | <b>43.9%</b> | <b>175 665</b> | <b>473 543</b> | <b>37.1%</b> | <b>-20.8%</b>  | <b>-6.3%</b> |
| Fresh               | 135 501        | 199 059        | 68.1%        | 127 062        | 186 426        | 68.2%        | 101 552        | 167 542        | 60.6%        | -20.1%         | -10.1%       |
| Frozen              | 35 690         | 114 706        | 31.1%        | 28 440         | 127 115        | 22.4%        | 38 832         | 144 495        | 26.9%        | +36.5%         | +13.7%       |
| Salted Meat         | 12 757         | 13 485         | 94.6%        | 12 103         | 12 978         | 93.3%        | 391            | 1 220          | 32.0%        | -96.8%         | -90.6%       |
| Prepared            | 26 446         | 41 994         | 63.0%        | 25 976         | 41 600         | 62.4%        | 21 257         | 36 712         | 57.9%        | -18.2%         | -11.7%       |
| Fresh Offals        | 12 663         | 14 360         | 88.2%        | 11 632         | 13 369         | 87.0%        | 2 926          | 4 443          | 65.8%        | -74.8%         | -66.8%       |
| Frozen Offals       | 9 524          | 104 240        | 9.1%         | 8 509          | 102 272        | 8.3%         | 6 845          | 99 762         | 6.9%         | -19.6%         | -2.5%        |
| Salted Offals       | 15 210         | 26 199         | 58.1%        | 7 292          | 14 509         | 50.3%        | 149            | 5 855          | 2.5%         | -98.0%         | -59.6%       |
| Prepared Offal      | 339            | 418            | 81.3%        | 261            | 367            | 71.1%        | 190            | 291            | 65.4%        | -27.2%         | -20.8%       |
| Fat                 | 911            | 5 480          | 16.6%        | 503            | 6 744          | 7.5%         | 3 523          | 13 223         | 26.6%        | +600.1%        | +96.1%       |
| <b>Total Beef</b>   | <b>255 149</b> | <b>652 396</b> | <b>39.1%</b> | <b>230 104</b> | <b>628 619</b> | <b>36.6%</b> | <b>183 330</b> | <b>600 695</b> | <b>30.5%</b> | <b>-20.3%</b>  | <b>-4.4%</b> |

Source : Comext

21 October 2021



# EU TRADE with UK

# EU IMPORTS Beef Products

## EU Import of BEEF from UK by Products from Jan to Jul

*In Tons of Carcase Weight*

|                     | 2019           |                |              | 2020           |                |              | 2021           |                |              | % 2021/2020    |               |
|---------------------|----------------|----------------|--------------|----------------|----------------|--------------|----------------|----------------|--------------|----------------|---------------|
|                     | United Kingdom | Extra-EU       | %            | United Kingdom | Extra-EU       | %            | United Kingdom | Extra-EU       | %            | United Kingdom | Extra-EU      |
| <b>Live Animals</b> | <b>1 664</b>   | <b>1 782</b>   | <b>93.4%</b> | <b>1 231</b>   | <b>1 280</b>   | <b>96.1%</b> | <b>534</b>     | <b>625</b>     | <b>85.5%</b> | <b>-56.6%</b>  | <b>-51.2%</b> |
| <b>Meats</b>        | <b>86 637</b>  | <b>252 692</b> | <b>34.3%</b> | <b>69 875</b>  | <b>198 543</b> | <b>35.2%</b> | <b>44 830</b>  | <b>171 101</b> | <b>26.2%</b> | <b>-35.8%</b>  | <b>-13.8%</b> |
| Fresh               | 59 899         | 160 889        | 37.2%        | 44 287         | 117 631        | 37.6%        | 28 130         | 96 050         | 29.3%        | -36.5%         | -18.3%        |
| Frozen              | 14 043         | 65 946         | 21.3%        | 12 492         | 54 001         | 23.1%        | 9 766          | 56 968         | 17.1%        | -21.8%         | +5.5%         |
| Salted Meat         | 522            | 1 962          | 26.6%        | 316            | 1 678          | 18.8%        | 135            | 1 817          | 7.4%         | -57.2%         | +8.3%         |
| Prepared            | 5 108          | 15 448         | 33.1%        | 5 135          | 16 255         | 31.6%        | 3 565          | 11 648         | 30.6%        | -30.6%         | -28.3%        |
| Fresh Offals        | 2 036          | 2 839          | 71.7%        | 2 170          | 2 930          | 74.0%        | 2 185          | 2 904          | 75.2%        | +0.7%          | -0.9%         |
| Frozen Offals       | 3 051          | 3 523          | 86.6%        | 3 458          | 3 968          | 87.2%        | 555            | 1 147          | 48.4%        | -83.9%         | -71.1%        |
| Salted Offals       | 1 044          | 1 045          | 99.9%        | 1 201          | 1 203          | 99.8%        | 15             | 16             | 91.8%        | -98.8%         | -98.7%        |
| Prepared Offal      | 77             | 90             | 85.9%        | 24             | 36             | 66.3%        | 6              | 14             | 42.9%        | -74.7%         | -60.9%        |
| Fat                 | 857            | 951            | 90.1%        | 793            | 840            | 94.3%        | 475            | 536            | 88.5%        | -40.1%         | -36.2%        |
| <b>Total Beef</b>   | <b>88 301</b>  | <b>254 474</b> | <b>34.7%</b> | <b>71 106</b>  | <b>199 823</b> | <b>35.6%</b> | <b>45 364</b>  | <b>171 725</b> | <b>26.4%</b> | <b>-36.2%</b>  | <b>-14.1%</b> |

Source : Estat - Comext

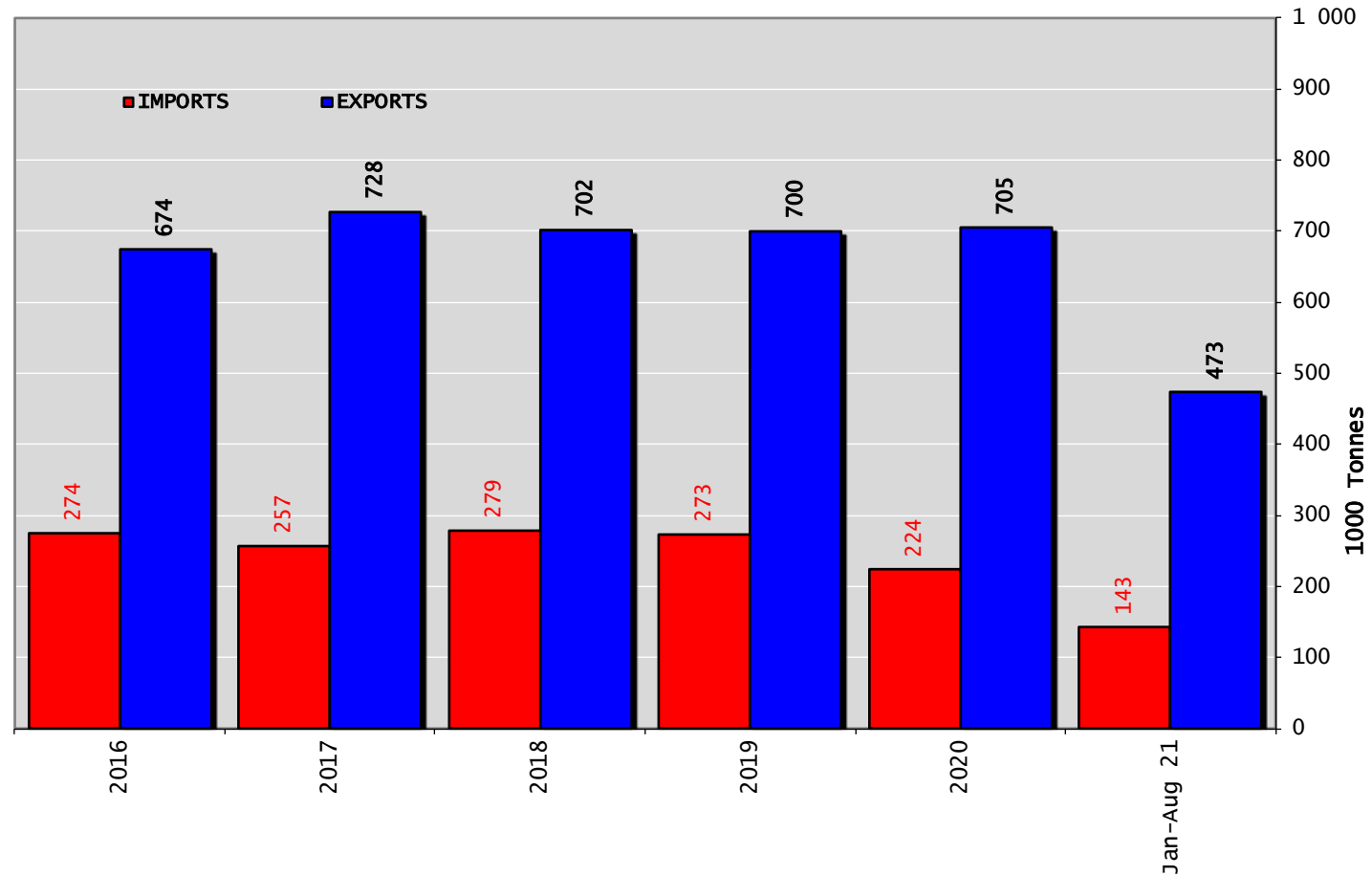
21 October 2021

# TRADE

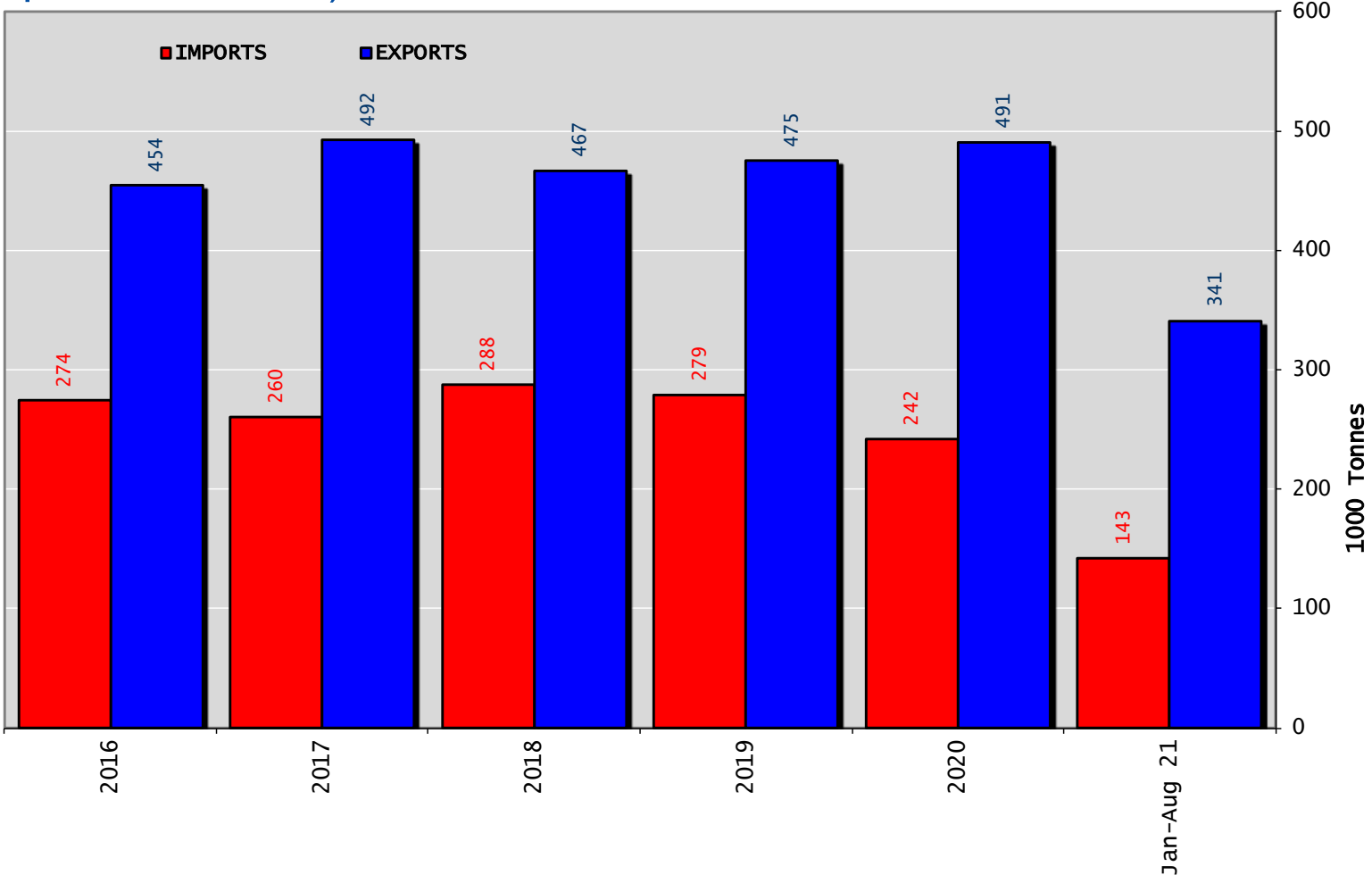
# EUTRADE BALANCE

## Beef & Live Animals

Trade Balance of Beef Products and Live Animals (without UK)



# Trade Balance of Beef Products (Except Live Animals) without UK

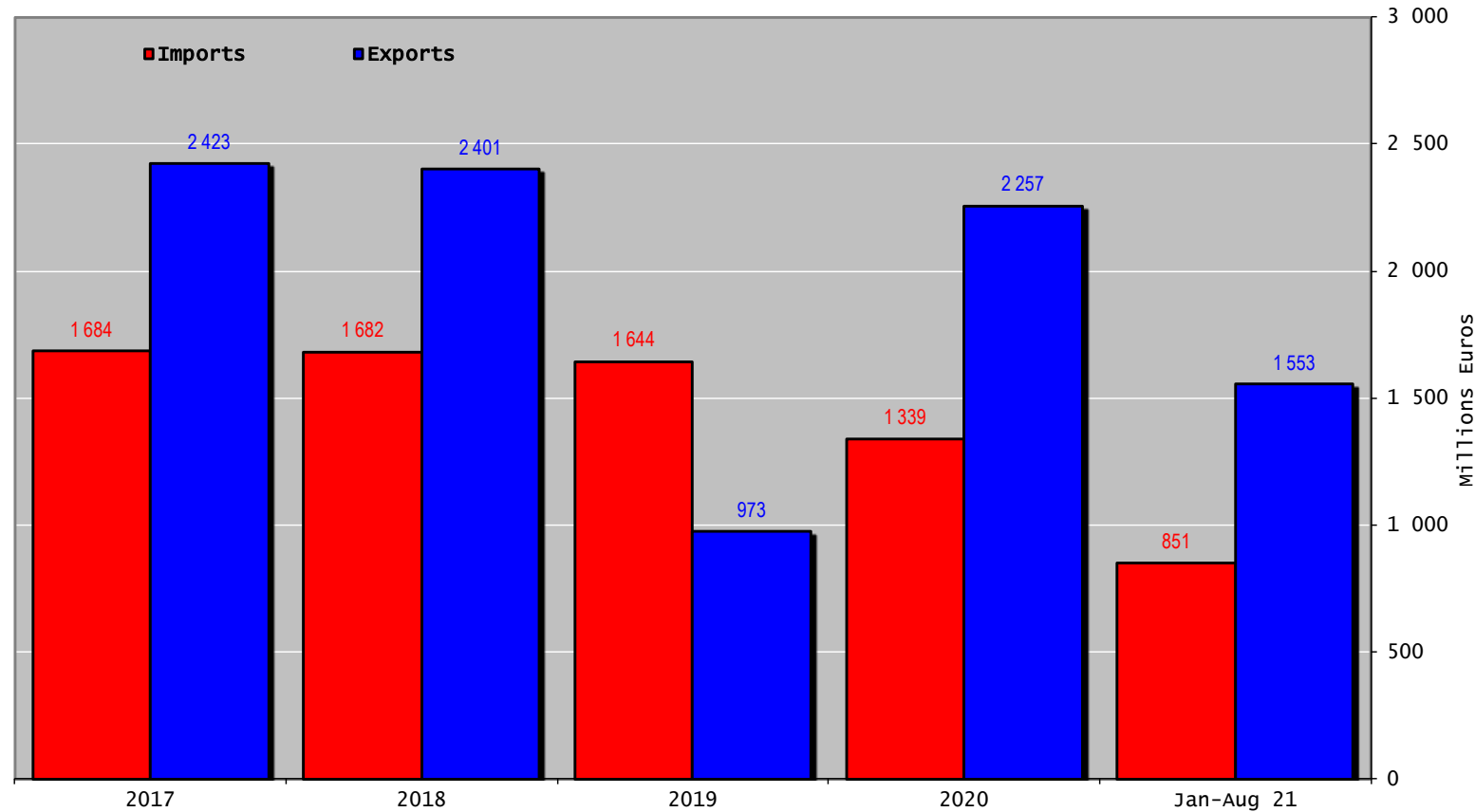


# TRADE

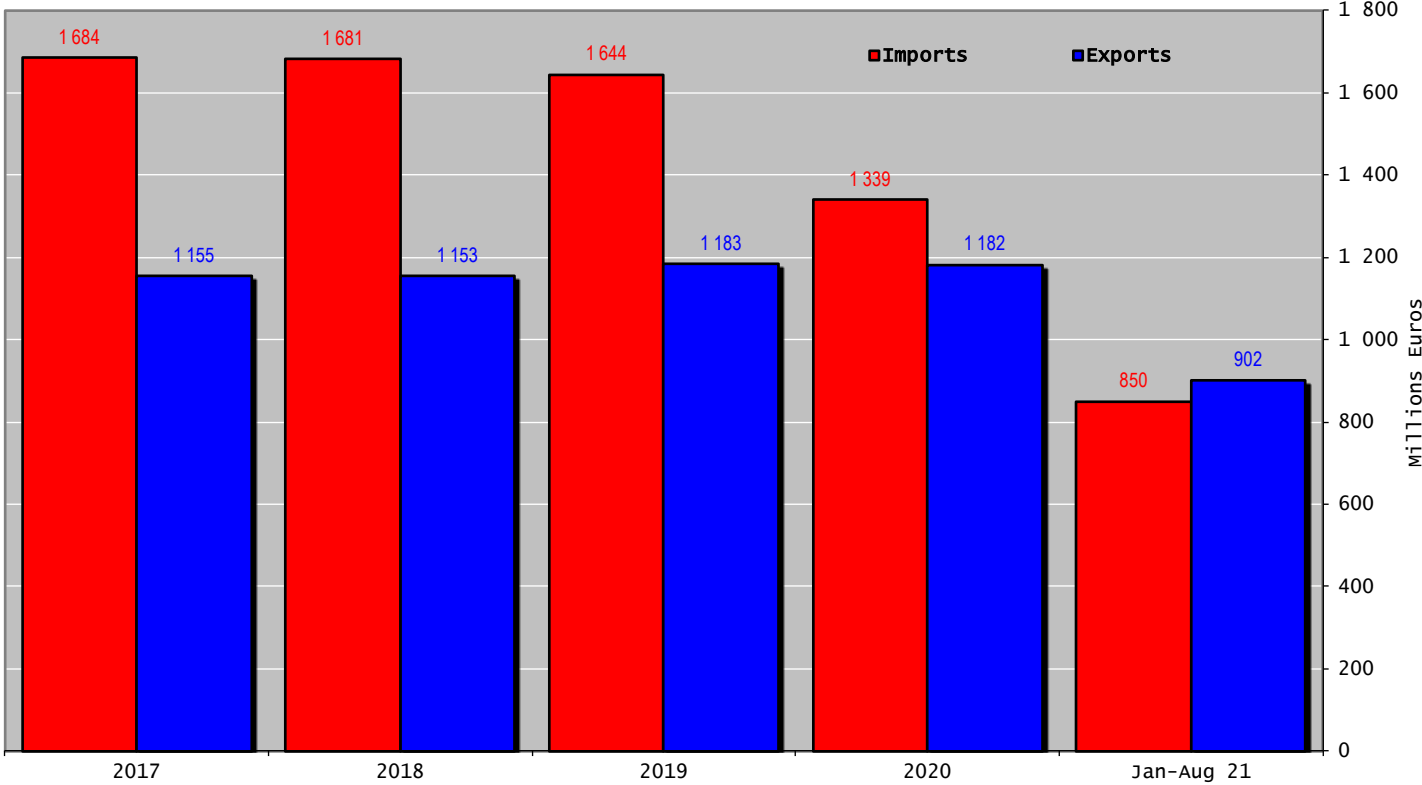
## EU TRADE BALANCE

### Beef & Live Animals

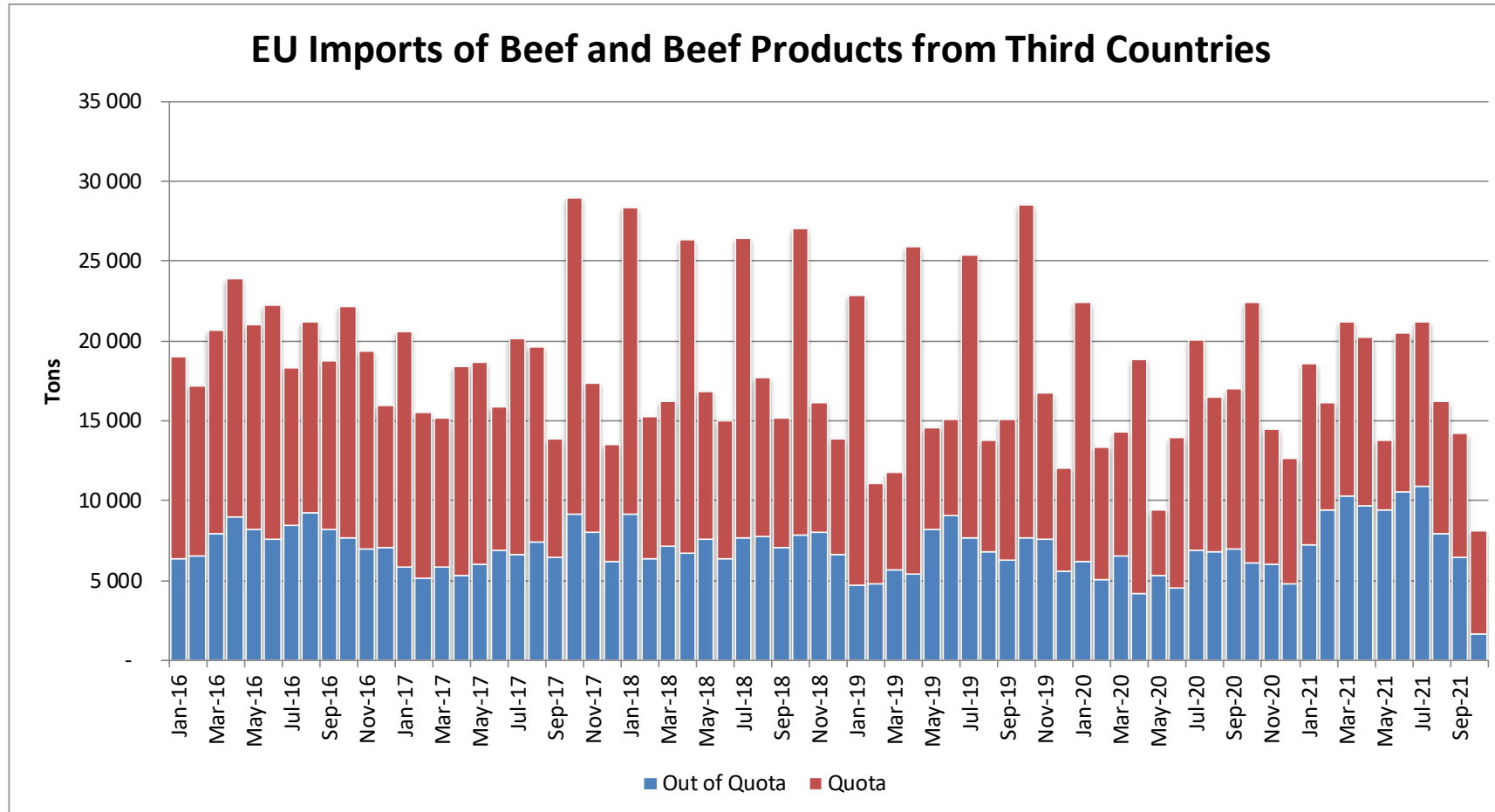
Trade Balance of Beef Products and Live Animals (without UK)



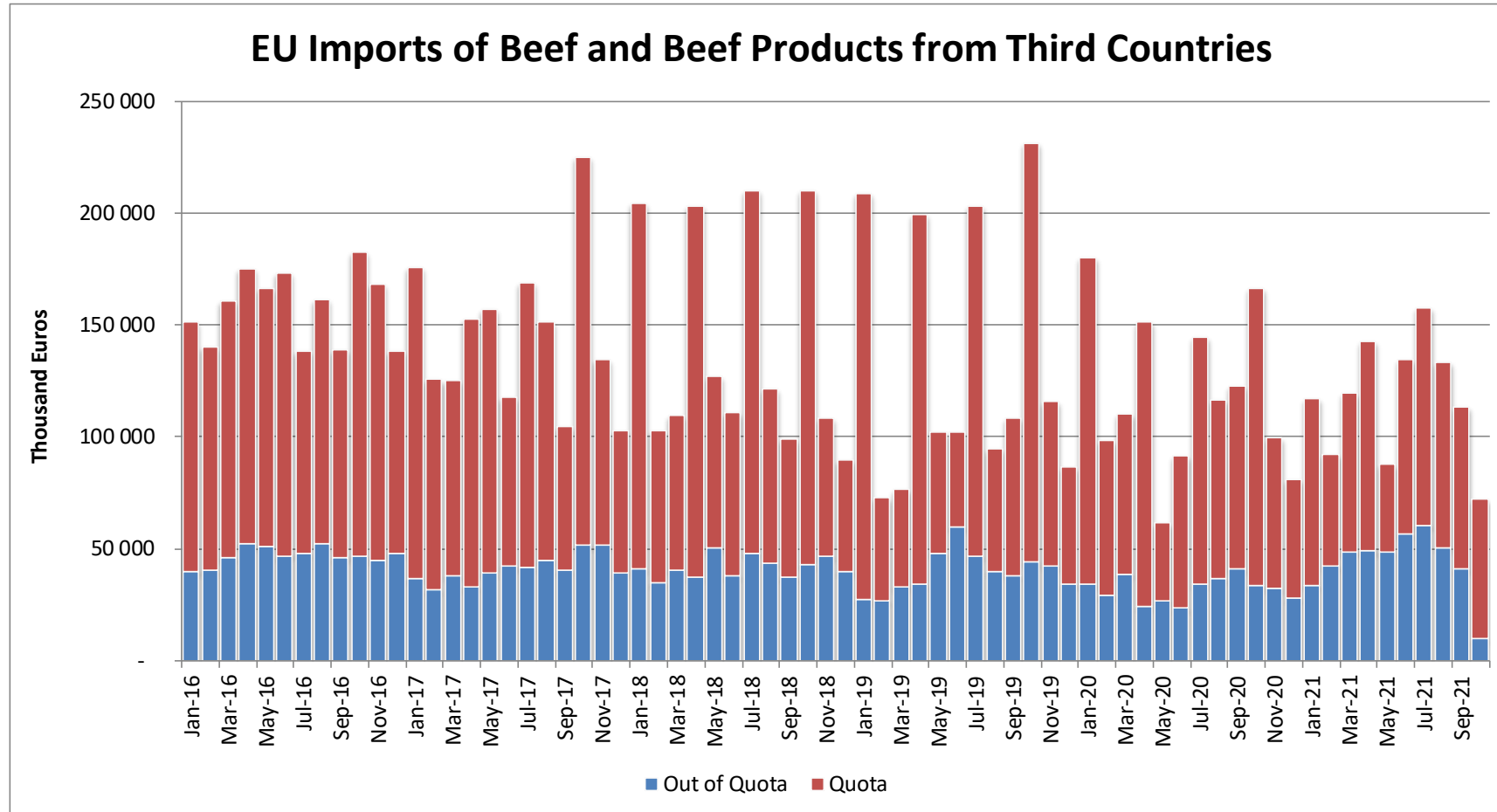
# Trade Balance of Beef Products (Except Live Animals) without UK



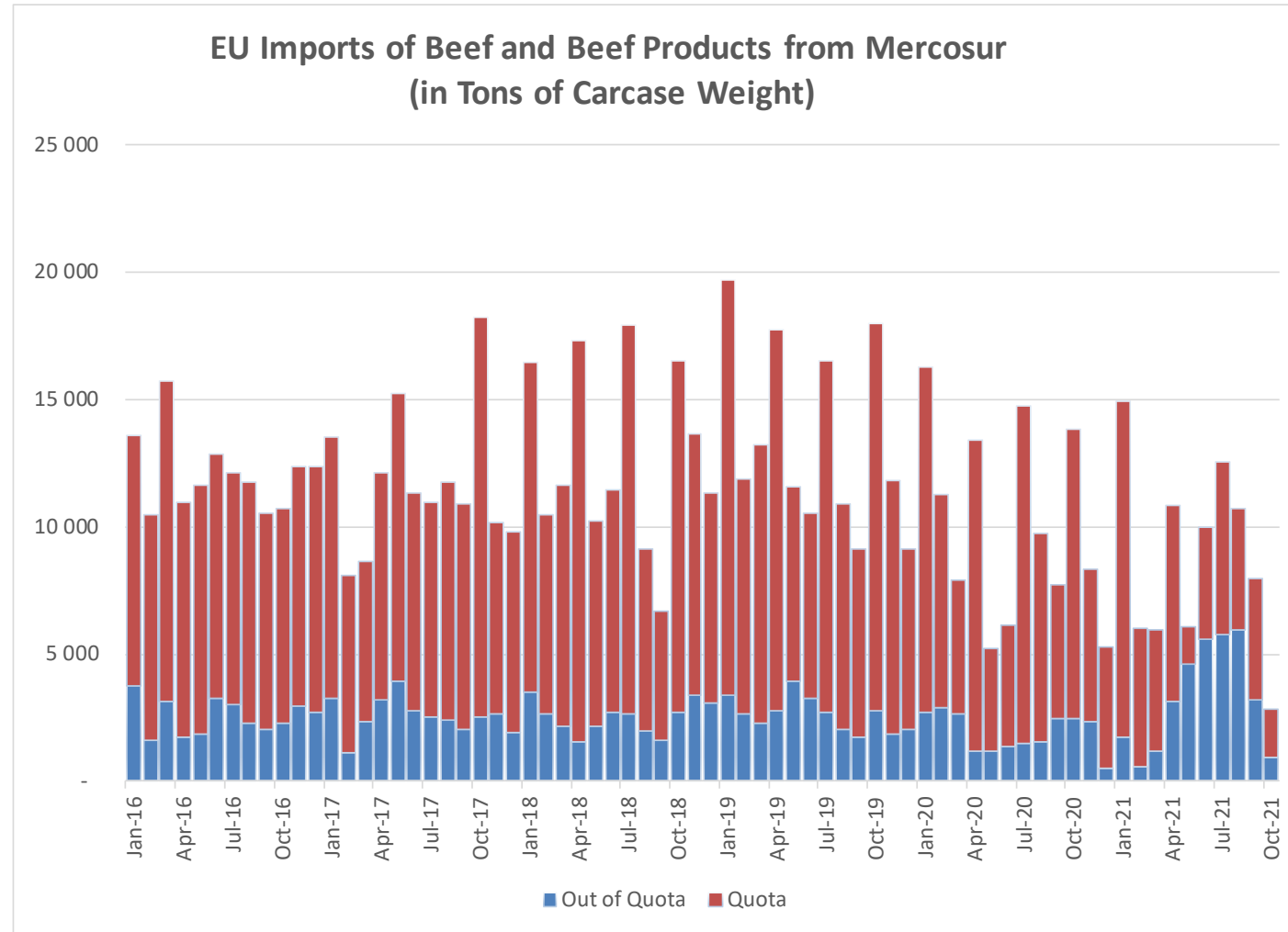
# Imports in and out of TRQs



# Imports in and out of TRQs

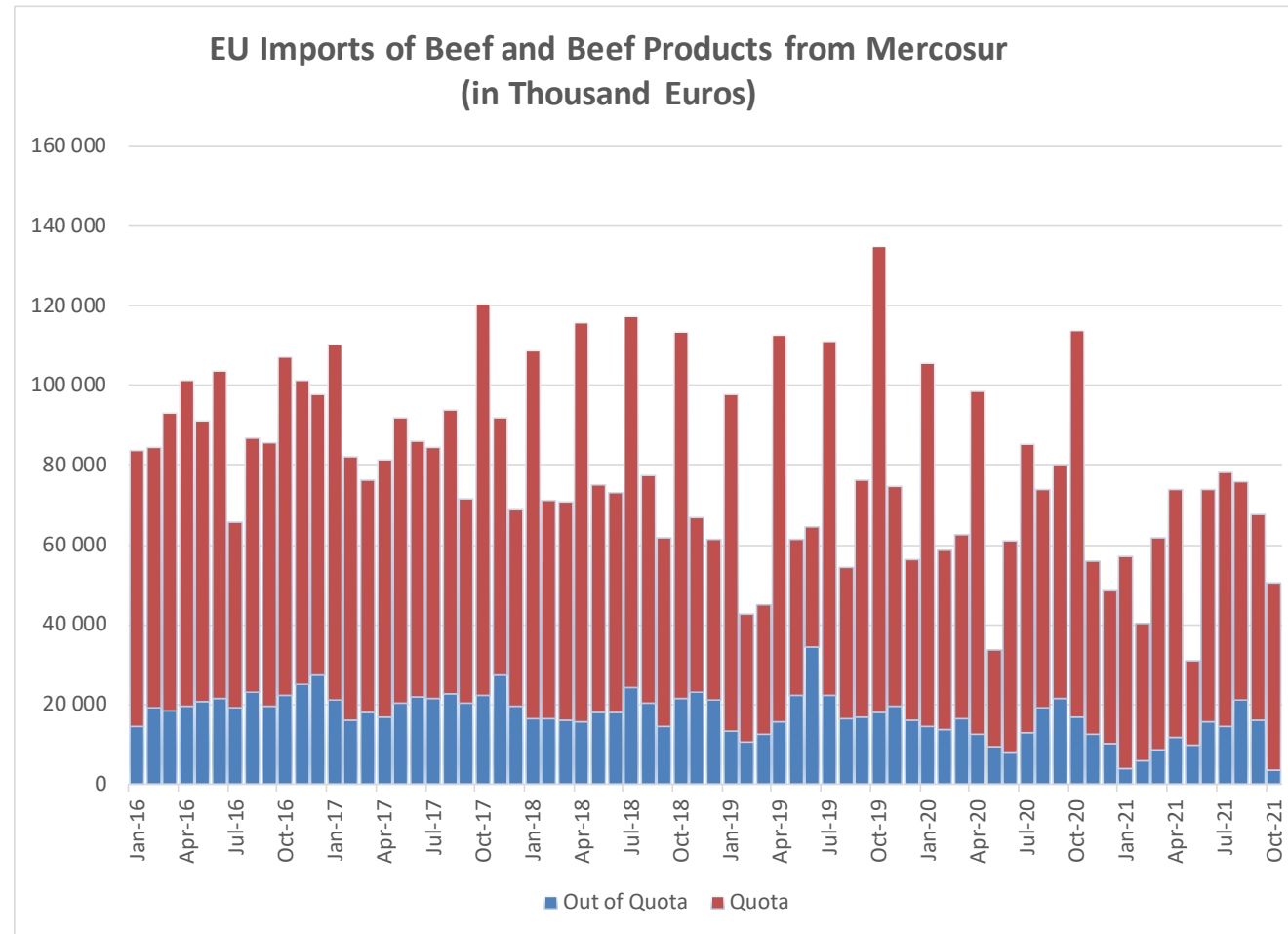


# Imports in and out of TRQs





# Imports in and out of TRQs



# High Quality Beef Import Quotas

Quota erga omnes

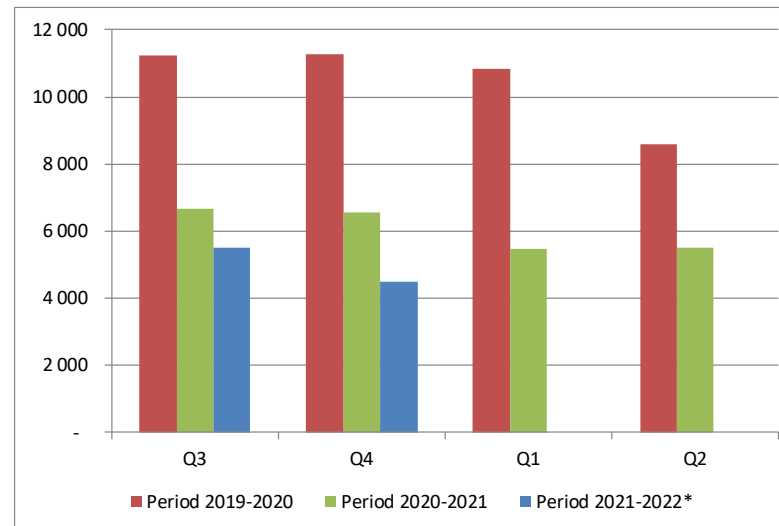
Regulation (EU) No 481/2012

|                          | 2019-Q3 | 2019-Q4 | 2020-Q1 | 2020-Q2 | TOTAL  |
|--------------------------|---------|---------|---------|---------|--------|
| Period 2019-2020         | 11 246  | 11 259  | 10 825  | 8 599   | 41 930 |
| Available                | 11 250  | 11 250  | 11 250  | 11 250  | 45 000 |
| Use                      | 99.97%  | 100.00% | 96.22%  | 76.44%  | 93.18% |
| Available after transfer | 11 250  | 11 254  | 11 241  | 11 675  |        |
|                          | 99.97%  | 100.00% | 96.30%  | 73.66%  |        |

|                          | 2020-Q3* | 2020-Q4 | 2021-Q1 | 2021-Q2 | TOTAL  |
|--------------------------|----------|---------|---------|---------|--------|
| Period 2020-2021         | 6 652    | 6 542   | 5 467   | 5 500   | 24 162 |
| Available                | 6 625    | 6 625   | 5 500   | 5 500   | 45 000 |
| Use                      | 100.00%  | 98.75%  | 99.41%  | 100.00% | 53.69% |
| Available after transfer | 11 250   | 6 598   | 5 583   | 5 533   |        |
|                          | 59.13%   | 99.16%  | 97.93%  | 99.41%  |        |

|                          | 2021-Q3* | 2021-Q4 | 2022-Q1 | 2022-Q2 | TOTAL  |
|--------------------------|----------|---------|---------|---------|--------|
| Period 2021-2022*        | 5 502    | 4 480   | -       | -       | 9 982  |
| Available                | 5 500    | 5 500   | 4 900   | 4 900   | 45 000 |
| Use                      | 100.00%  | 81.45%  | 0.00%   | 0.00%   | 22.18% |
| Available after transfer | 5 500    | 5 498   | 5 920   | 9 800   |        |
|                          | 100.00%  | 81.48%  | 0.00%   | 0.00%   |        |

\* Until 14.10.2021

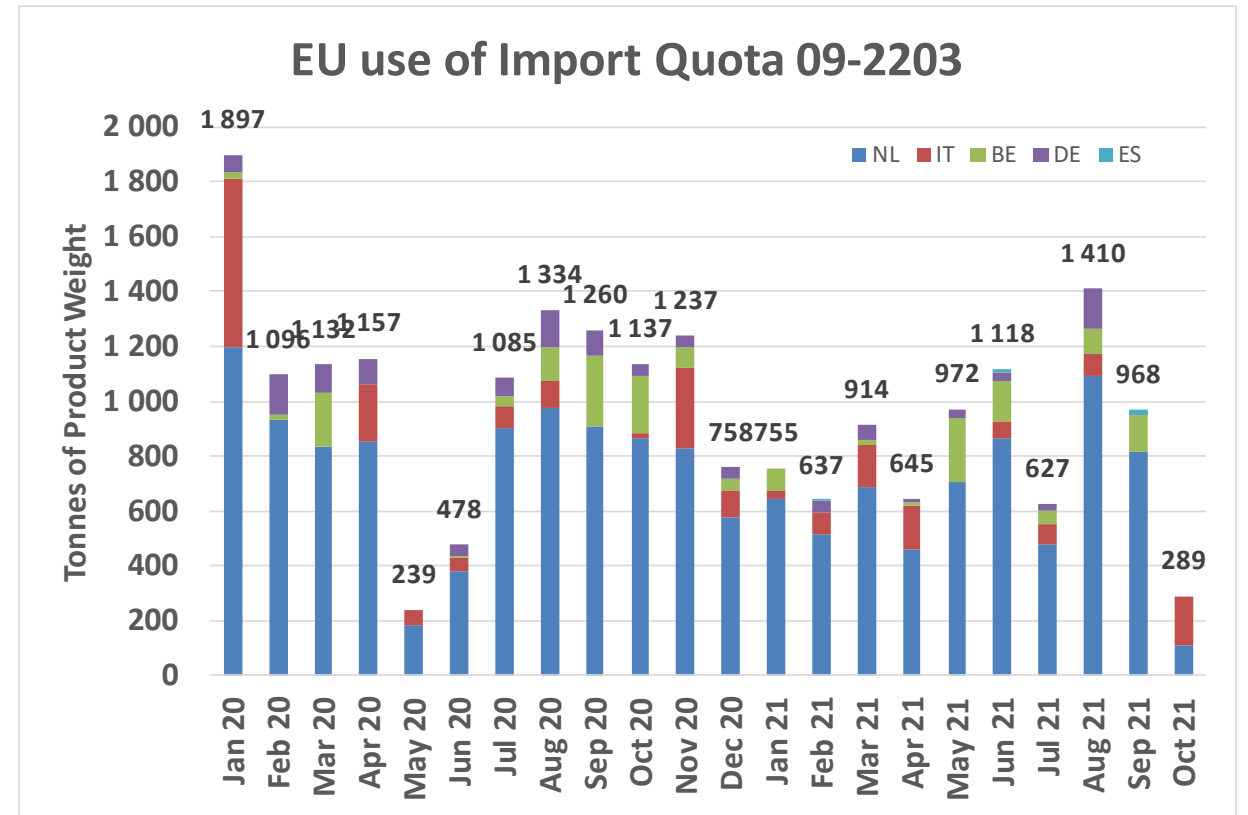


# High Quality Beef Import Quotas

| Origin                           | GATT 2020-2021 |              |              |              |               |
|----------------------------------|----------------|--------------|--------------|--------------|---------------|
|                                  | 2020-Q3        | 2020-Q4      | 2021-Q1      | 2021-Q2      | Total         |
| NL                               | 2 785          | 2 274        | 1 848        | 2 026        | 8 933         |
| IT                               | 174            | 404          | 263          | 228          | 1 069         |
| BE                               | 417            | 330          | 96           | 394          | 1 237         |
| DE                               | 305            | 124          | 98           | 72           | 598           |
| ES                               | -              | -            | 2            | 15           | 17            |
| <b>Total import within Quota</b> | <b>3 680</b>   | <b>3 132</b> | <b>2 306</b> | <b>2 735</b> | <b>11 853</b> |
| Available                        | 4 625          | 4 625        | 4 625        | 4 625        | 18 500        |
| Use                              | 79.57%         | 67.72%       | 49.87%       | 59.13%       | 64.07%        |
| After transfer                   | 4 625          | 5 570        | 6 118        | 6 944        |               |
| Use                              | 79.57%         | 56.23%       | 37.70%       | 39.39%       |               |

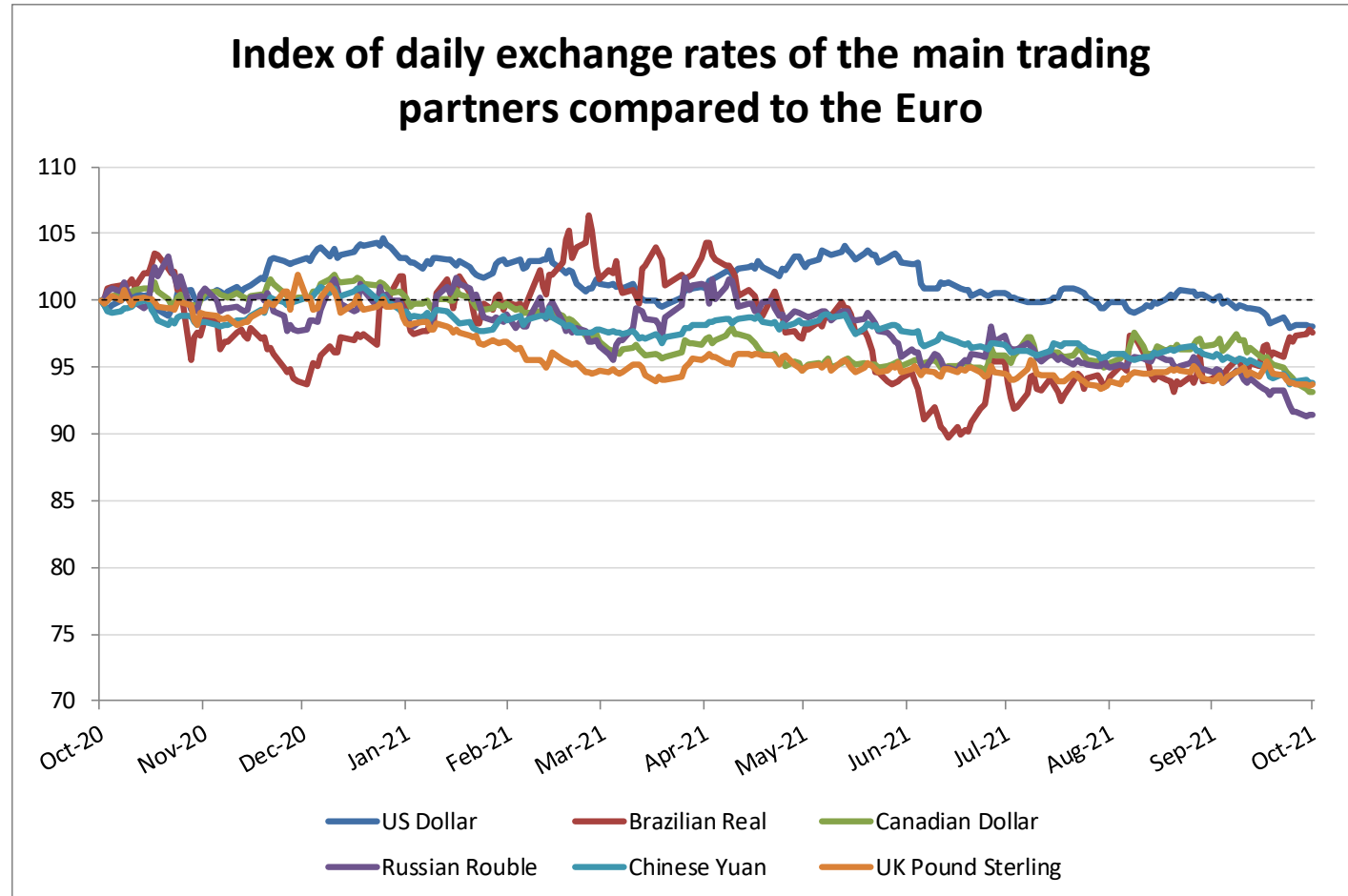
| Origin                           | GATT 2021-2022 |         |         |         |        |
|----------------------------------|----------------|---------|---------|---------|--------|
|                                  | 2021-Q3        | 2021-Q4 | 2022-Q1 | 2022-Q2 | Total  |
| NL                               | 2 384          |         |         |         |        |
| IT                               | 151            |         |         |         |        |
| BE                               | 282            |         |         |         |        |
| DE                               | 173            |         |         |         |        |
| ES                               | 15             |         |         |         |        |
| <b>Total import within Quota</b> | <b>3 005</b>   |         |         |         |        |
| Available                        | 5 750          | 5 750   | 6 350   | 6 350   | 24 200 |
| Use                              | 52.26%         |         |         |         |        |
| After transfer                   | 5 750          |         |         |         |        |
| Use                              | 52.26%         |         |         |         |        |



# WORLD BEEF MARKET

EXCHANGE RATE INDEX / Euro

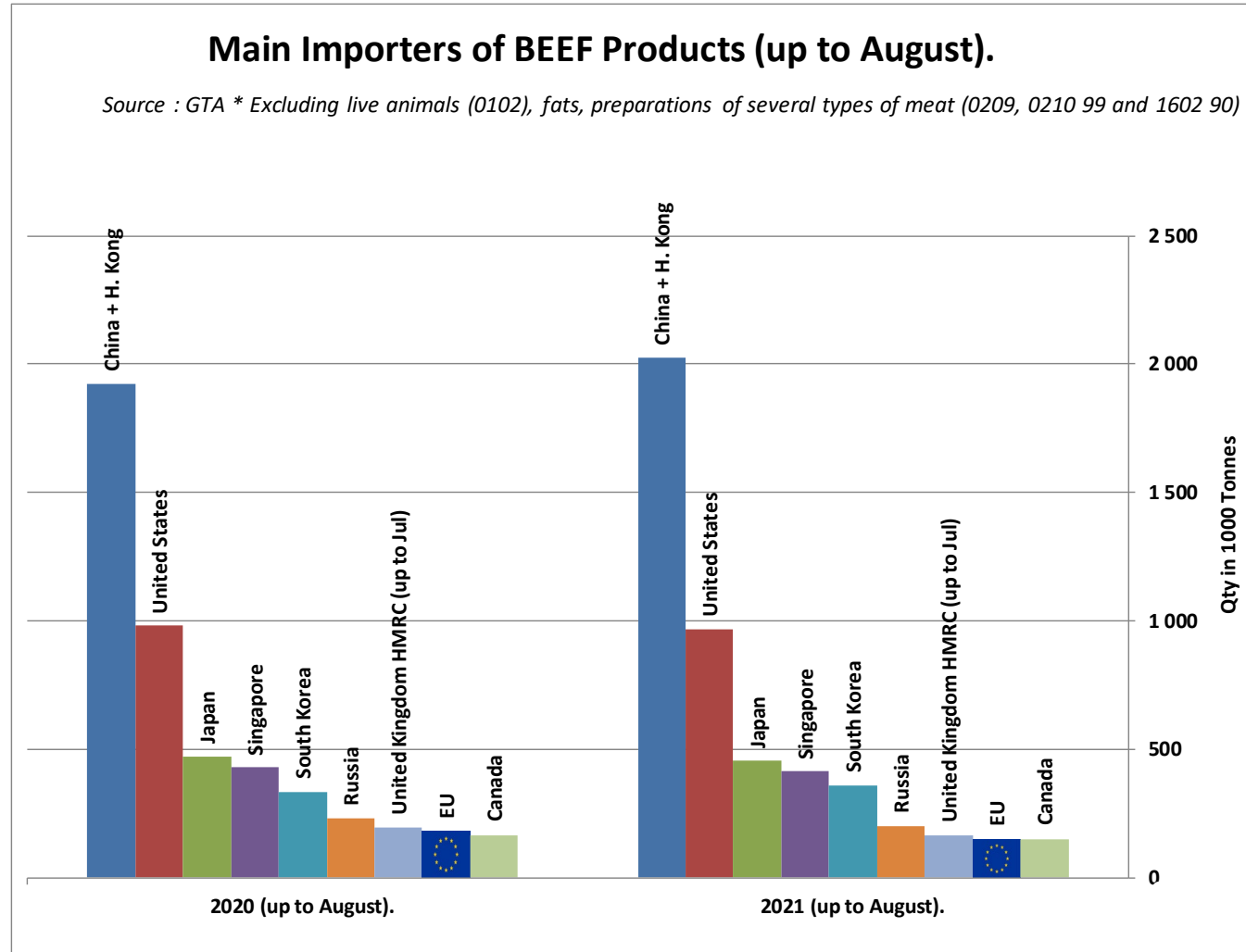
Main Trading Partners



Source : ECB

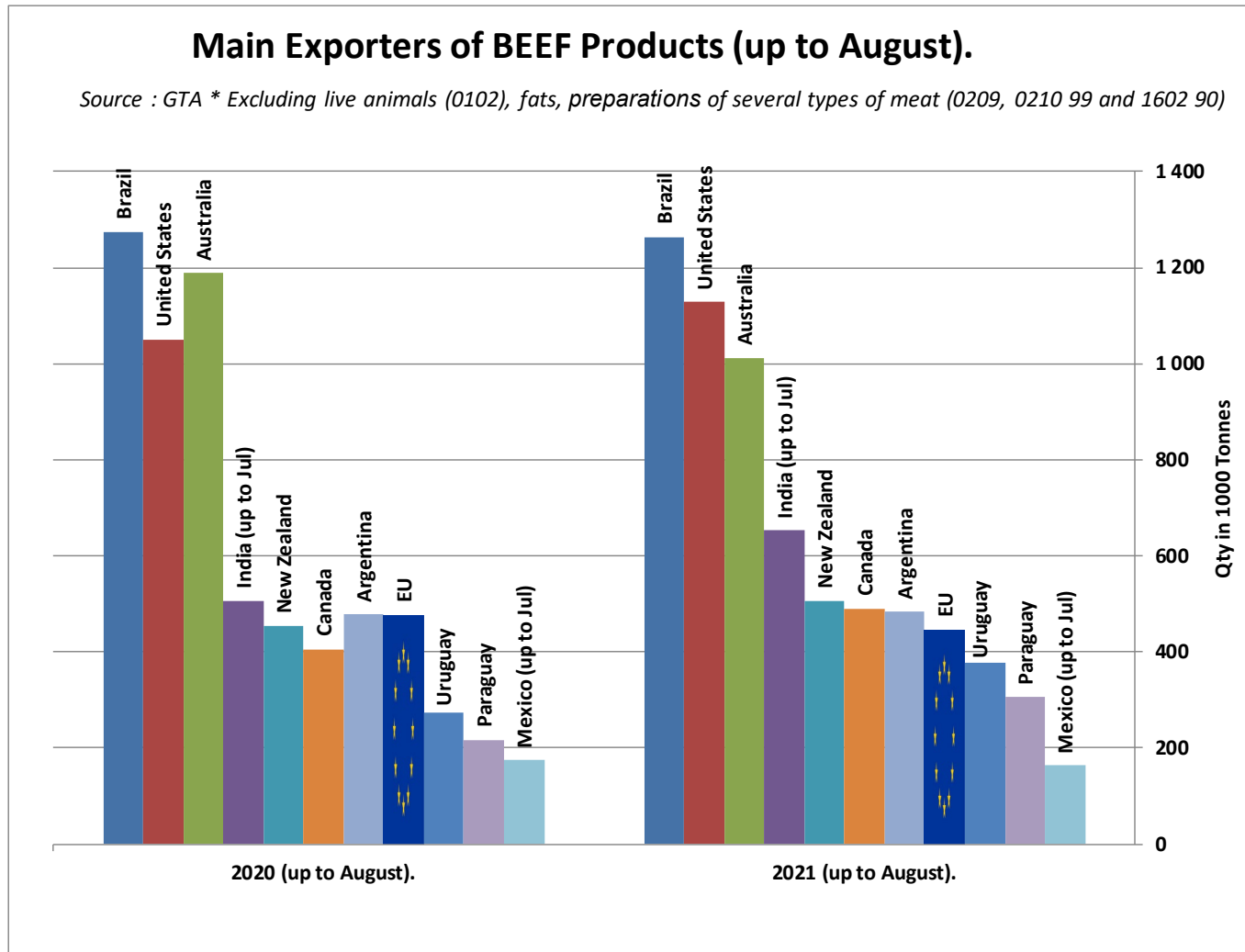
# WORLD BEEF MARKET

## E.U. + UK IMPORTS BEEF MAIN IMPORTERS



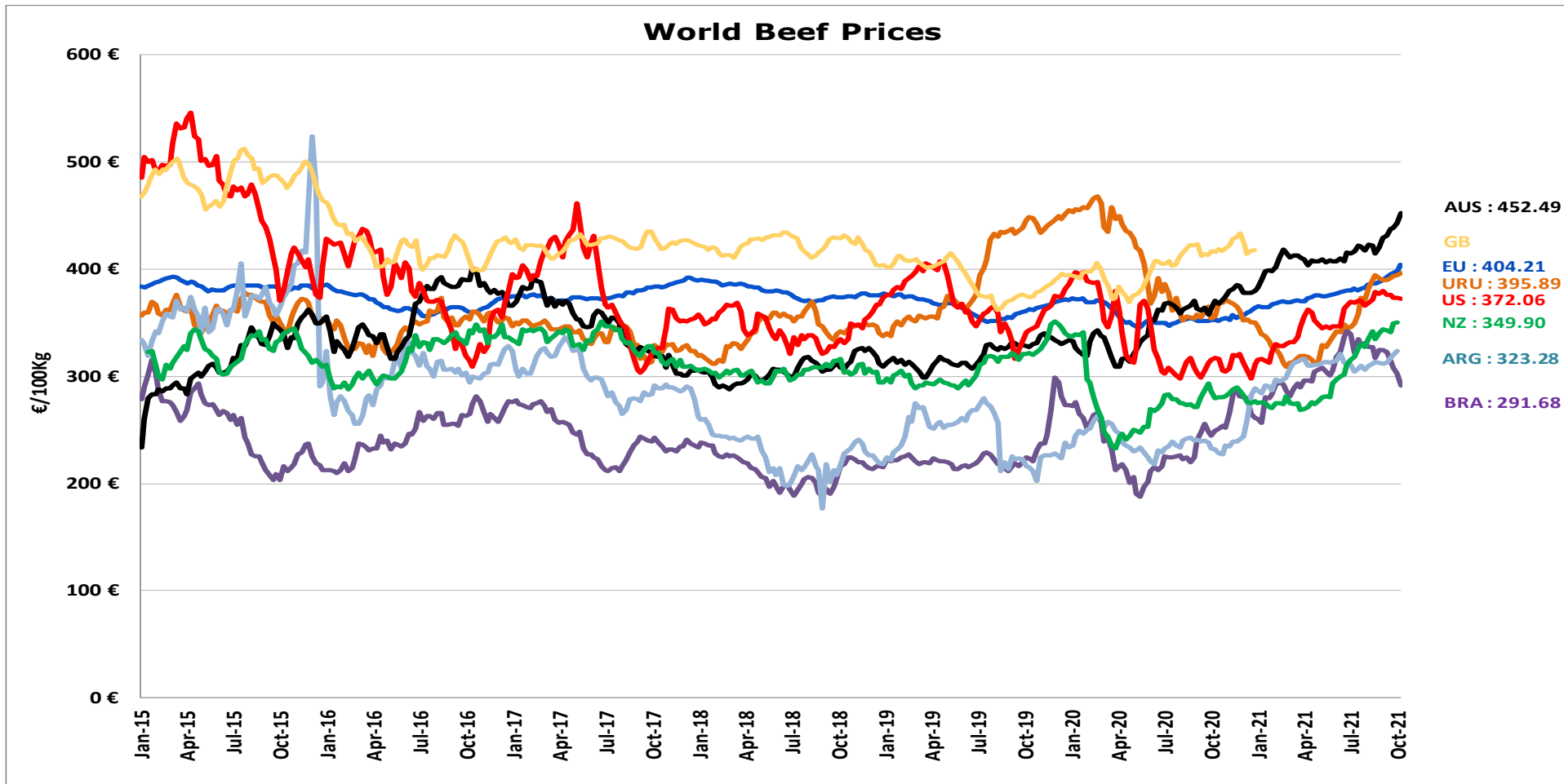
# WORLD BEEF MARKET

## 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](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](http://www.abc-consorcio.com.ar/Estadisticas/detalle/117/precios_comparativos_del_novillo.html)

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THANK YOU VERY MUCH

More Information at:

EU Market Observatory

[https://ec.europa.eu/agriculture/market-observatory/meat\\_en](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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