



European  
Commission

# BEEF & VEAL MARKET SITUATION

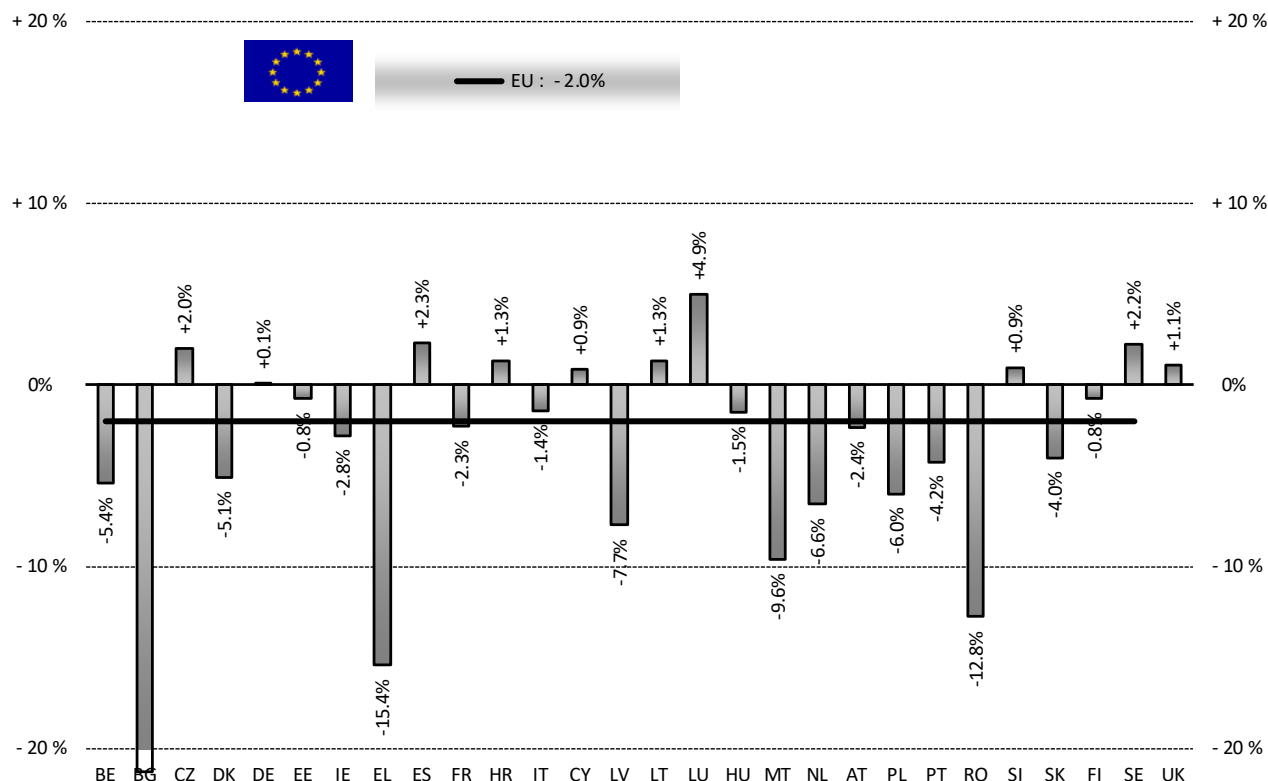


CMO Committee 23 January

# PRODUCTION

# % EVOLUTION HEADS

HEADS	Jan-Oct 19/18	
	EU15	EU28
Bull	+0.6%	+0.0%
Bullock	-3.2%	-3.1%
Cow	-5.7%	-6.2%
Heifer	+3.1%	+2.7%
Calve	+0.1%	-0.2%
Young cattle	-6.5%	-6.5%
Meat of bovine animals	-1.6%	-2.0%



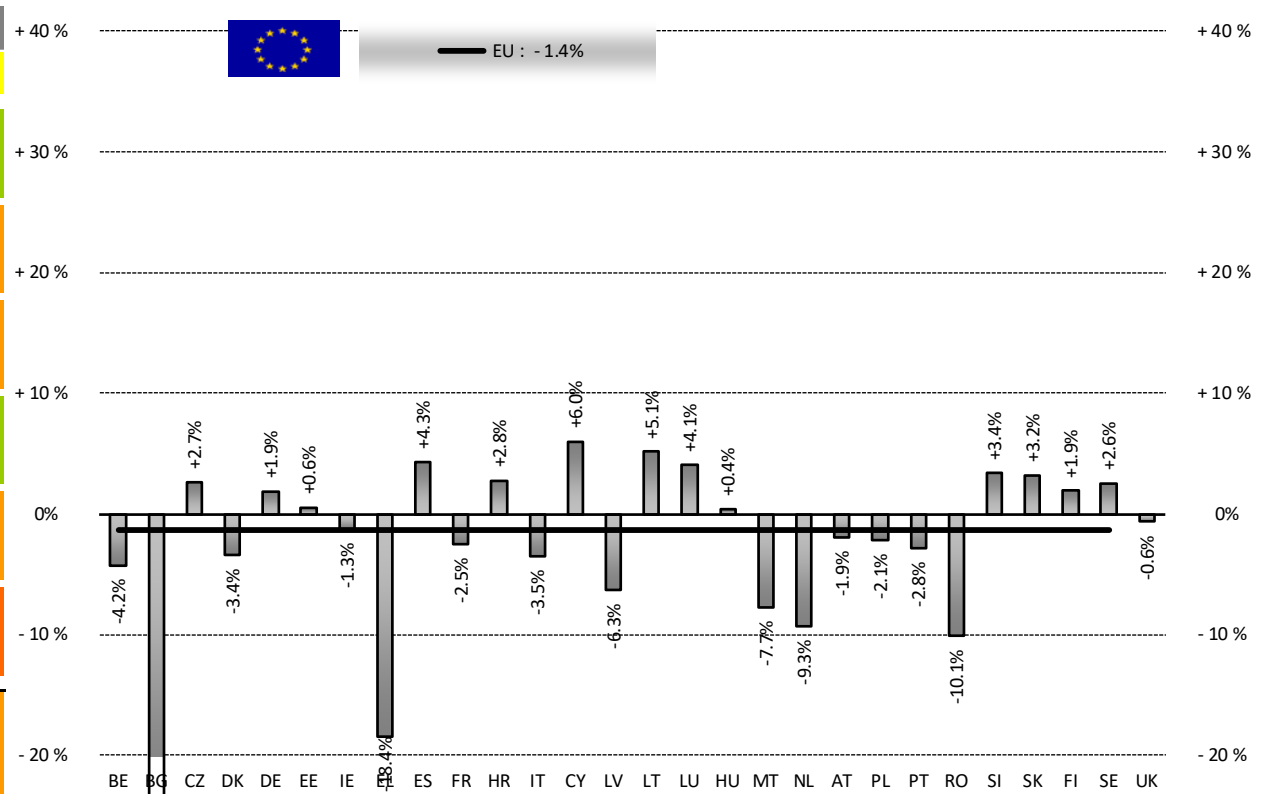
Estimates for last month of period :

Source : EStat - Newcronos

# PRODUCTION

# % EVOLUTION TONNES

TONNES	Jan-Oct 19/18	
	EU15	EU28
Bull	+0.4%	+0.5%
Bullock	-3.5%	-3.5%
Cow	-4.4%	-4.7%
Heifer	+3.0%	+2.9%
Calve	-0.5%	-0.6%
Young cattle	-6.4%	-6.3%
Meat of bovine animals	-1.4%	-1.4%



Estimates for last month of period :

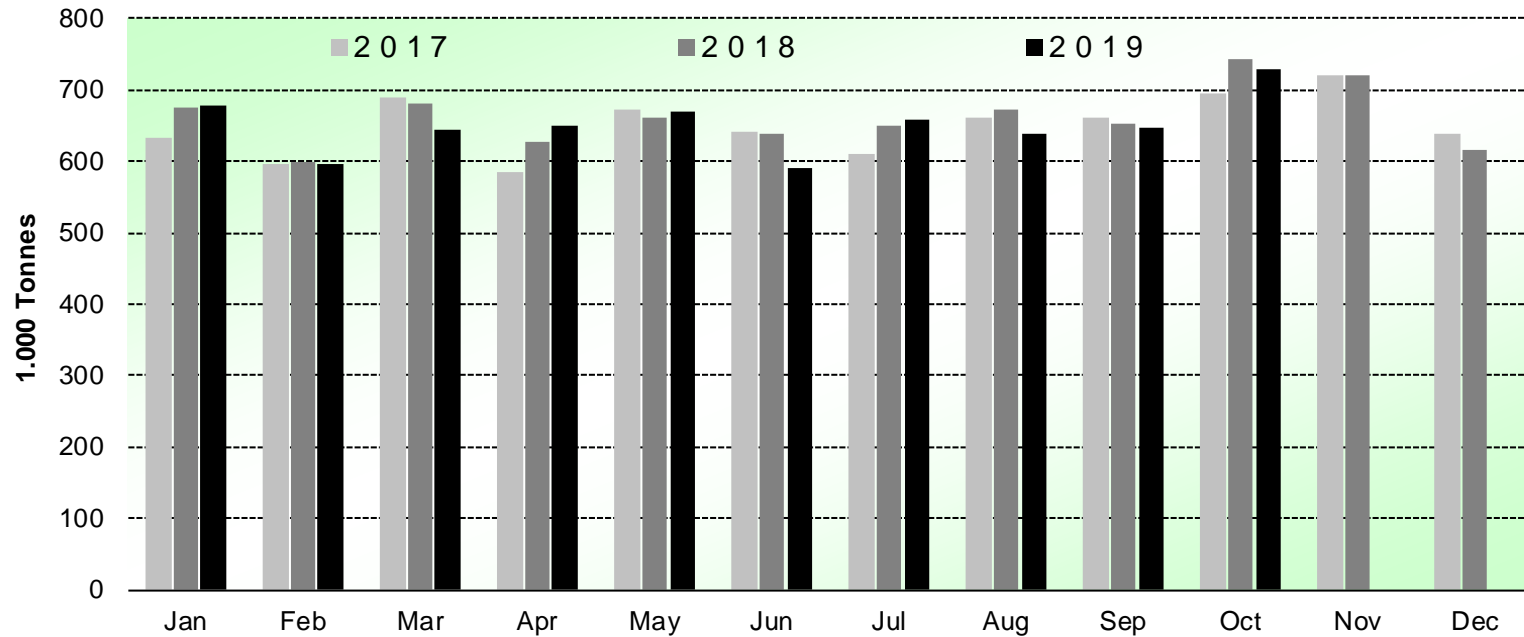
Source : EStat - Newcronos

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# PRODUCTION

# HISTORIC TONNES

## Beef & Veal Production (E28 Slaughtering) - Tonnes



Source : EStat-Newcronos

# PRICES CARCASSES

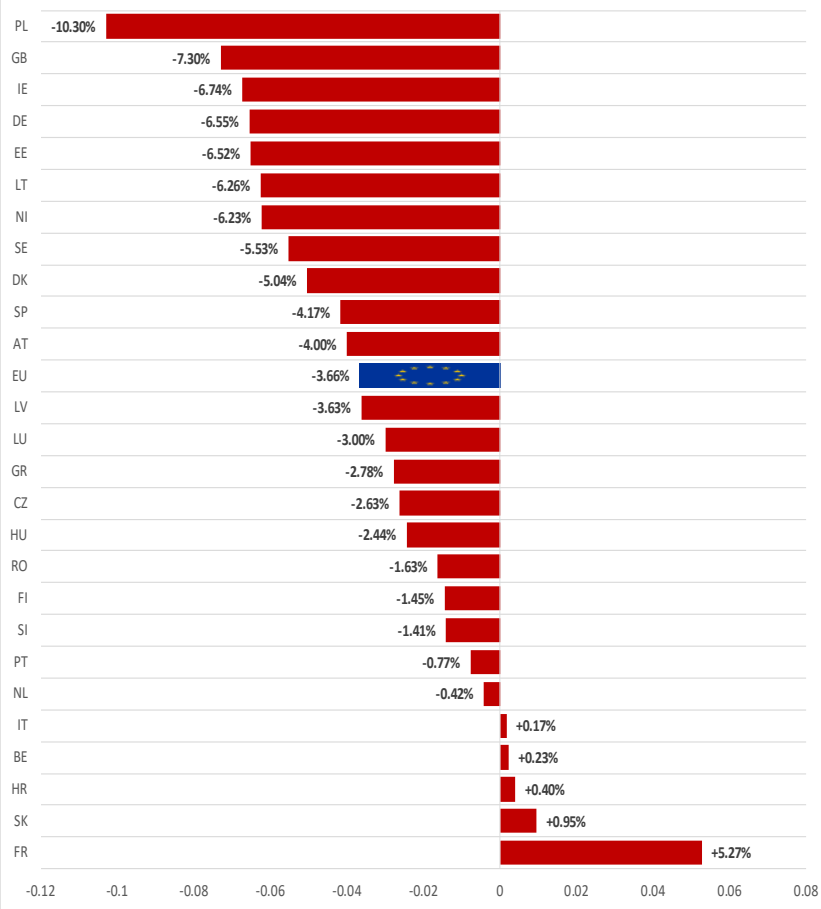
EU Prices week		3	Evolution since last week	Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z-R3	371.9	- 0.0%	+ 0.2%	- 0.8%
	Young Bovines (Z)	373.0	+ 0.4%	+ 0.6%	+ 0.4%
	Young Bulls (A)	367.3	- 0.2%	- 0.3%	- 2.0%
	Steers (C)	382.8	- 0.1%	+ 0.7%	- 1.1%
	Cows (D)	278.9	+ 2.5%	+ 1.6%	+ 0.5%
	Heifers (E)	372.5	+ 0.1%	+ 1.1%	- 2.6%
Live Animals	Male Calves Dairy Type	72.44	+ 6.3%	- 9.5%	- 14.6%
	Male Calves Beef Type	185.0	- 1.7%	- 4.3%	- 8.3%
	Young Store Cattle	2.37	+ 1.7%	+ 4.0%	+ 1.1%
	Yearling Male Store Cattle	2.24	- 1.0%	+ 4.0%	- 0.6%
	Yearling Female Store Cattle	2.31	+ 0.5%	+ 1.0%	- 1.8%
	Calves slaughtered <8M	534.3	+ 6.5%	+ 2.4%	+ 2.4%

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

# PRICES CARCASSES

# EU EVOLUTION A/C/Z.R3

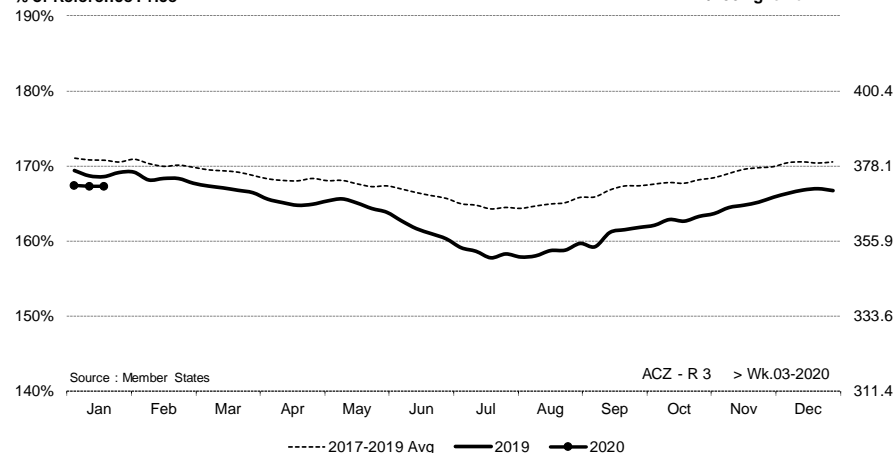
EU ACZ R3 Price Comparison between average monthly price January 2019 - December 2019 compared to January 2018 - December 2018



ACZ - R 3 > Wk.03-2020

% of Reference Price

€/100 kg cwe



Price in week 03 : **371.97**

Average price in December 2019 : **370.79**

% change y/y : **- 0.8%**

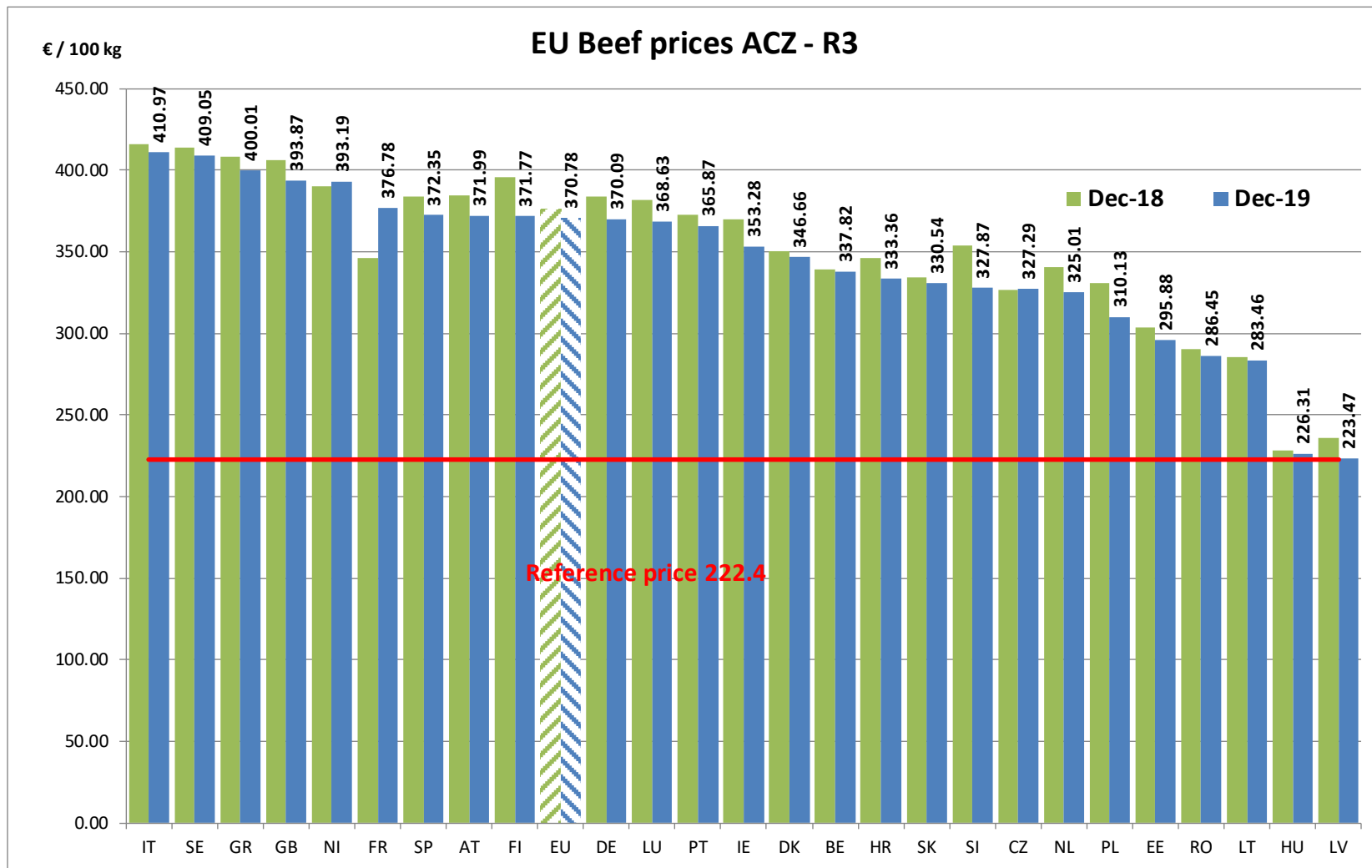
% change y/y : **- 1.3%**

% Ref. Price in wk 3 : **167.3%**

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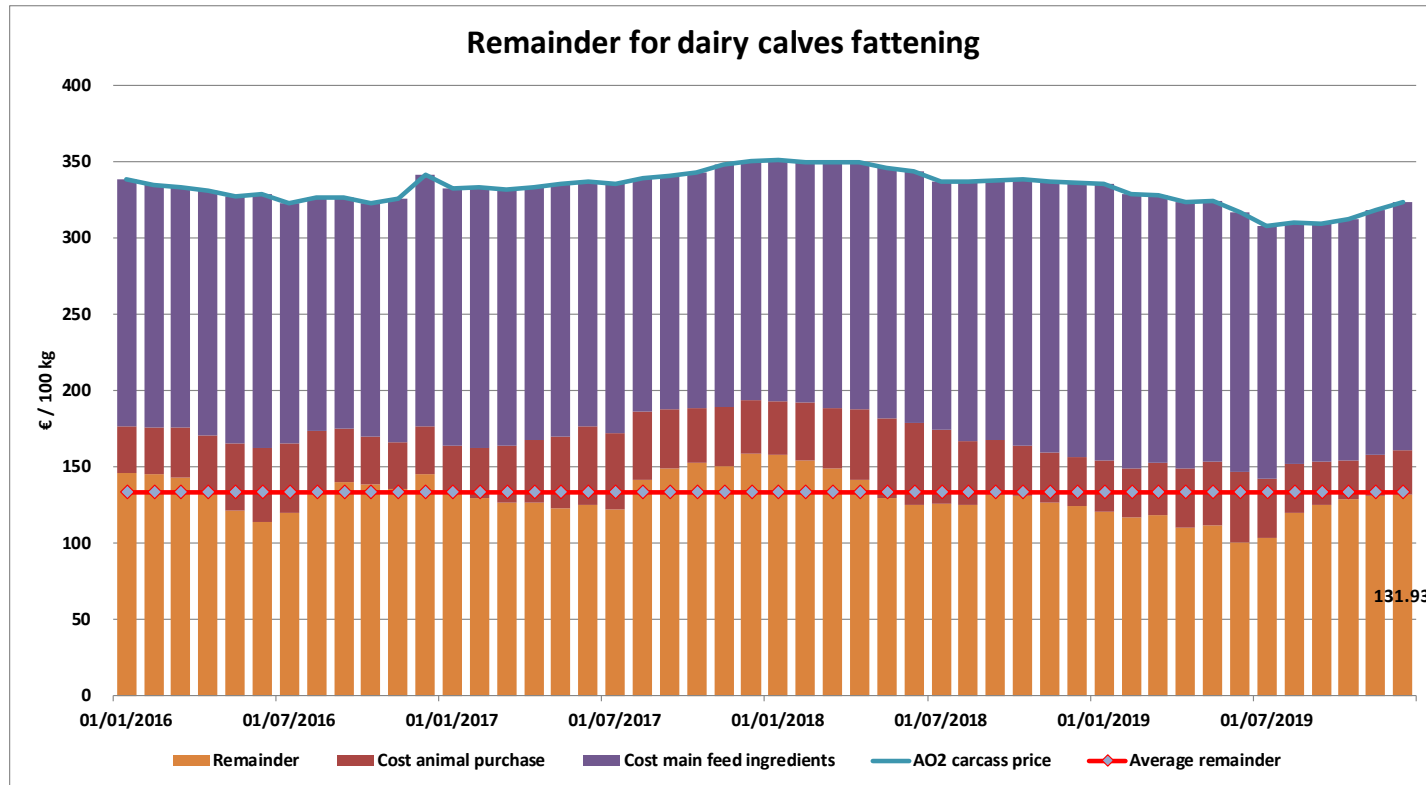
# PRICES CARCASSES

# EU EVOLUTION A/C/Z.R3



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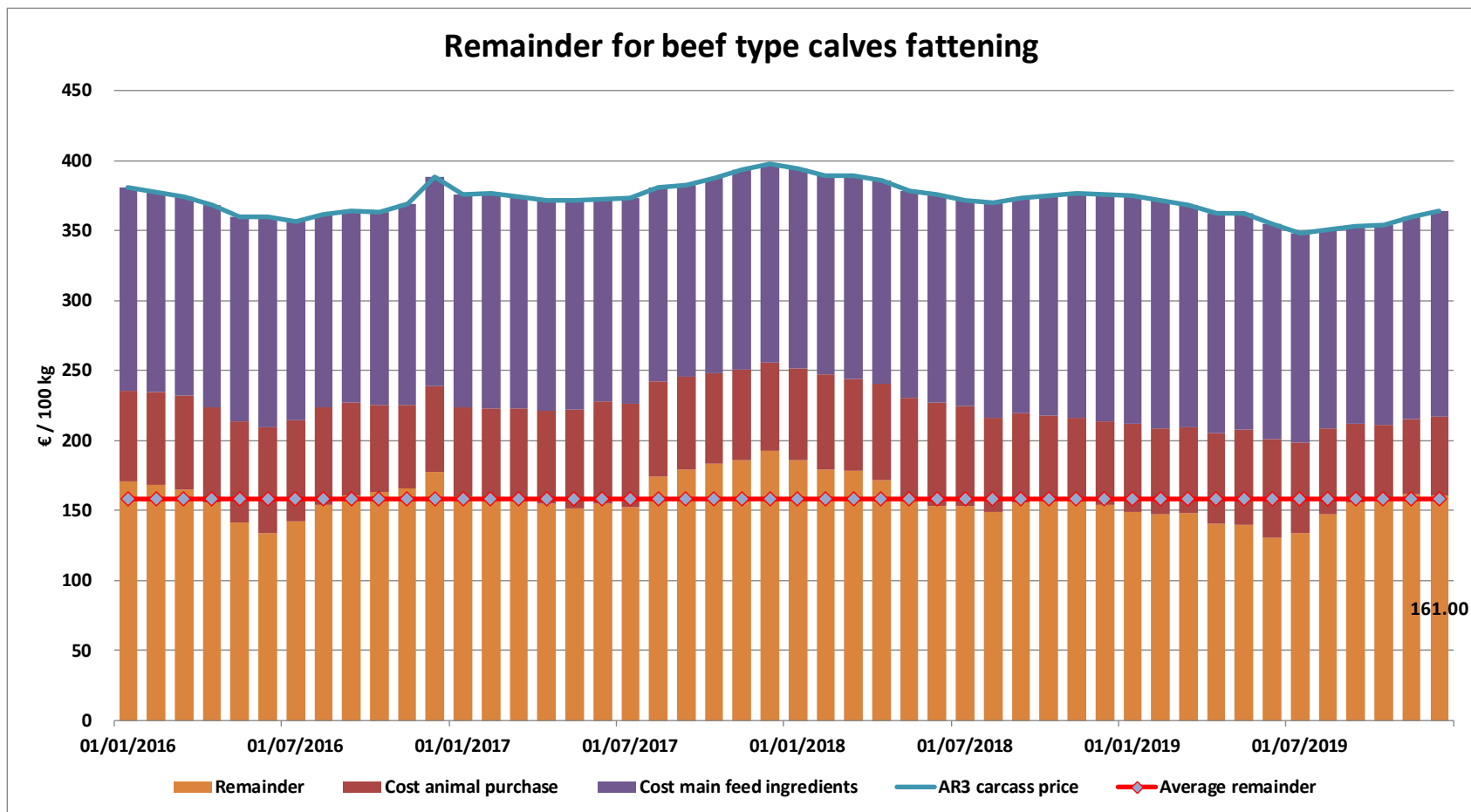
# REMAINDERS



23 January 2020

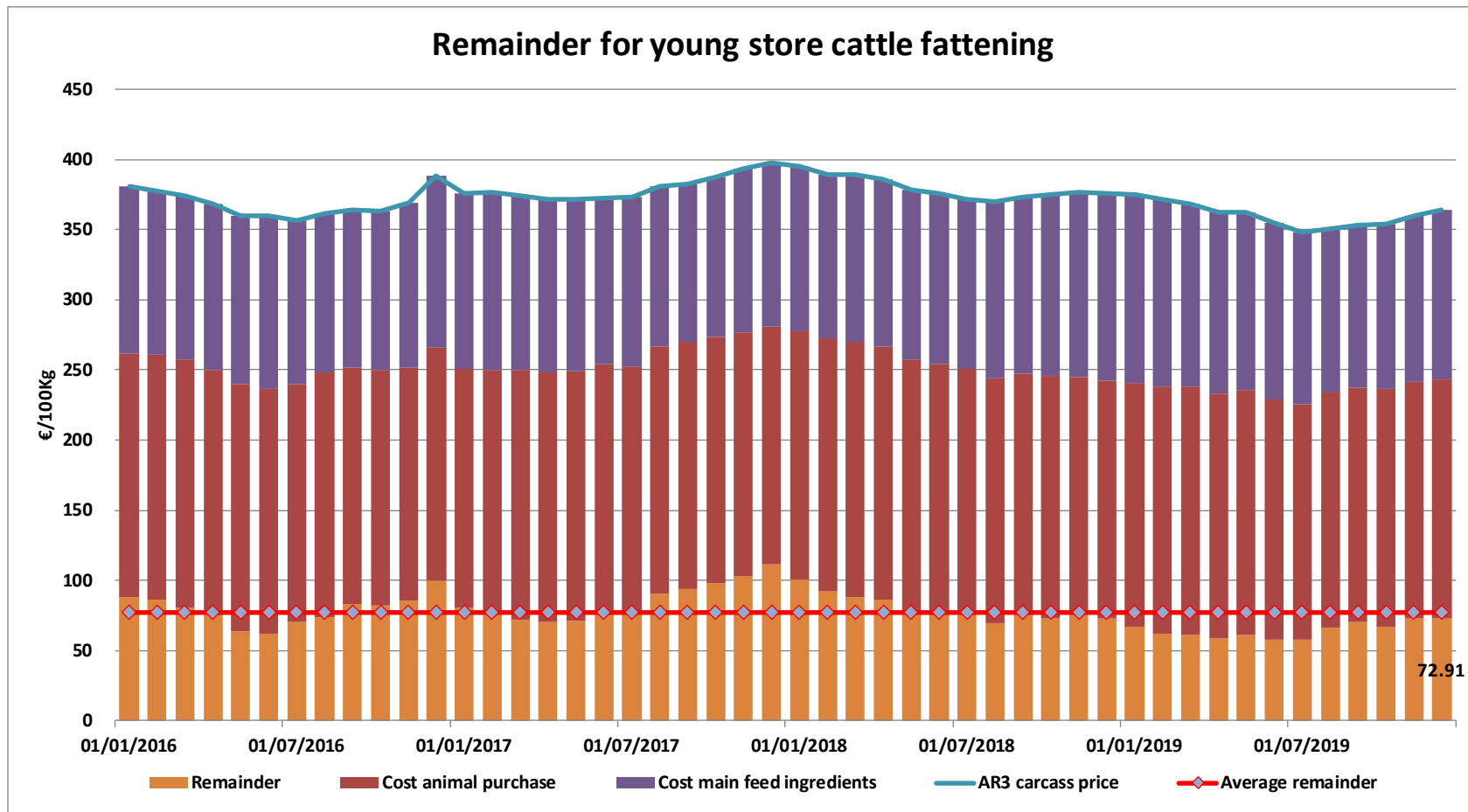


# REMAINDERS



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# REMAINDERS



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# TRADE

# EU EXPORTS

## Beef & Live Animals

### EU exports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Destinations	2015		2016		2017		2018		Jan-Nov 19		Compared to Jan-Nov 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Ghana	39 225	6.6%	39 680	5.6%	41 007	5.4%	39 906	5.4%	39 244	5.7%	+ 6.6%
Lebanon	50 263	8.4%	47 033	6.7%	38 554	5.0%	42 525	5.8%	33 949	5.0%	- 14.0%
Algeria	16 085	2.7%	25 004	3.5%	26 305	3.4%	35 361	4.8%	52 916	7.8%	+ 71.7%
Hong Kong	45 198	7.5%	58 383	8.3%	90 659	11.9%	69 897	9.5%	60 112	8.8%	- 10.0%
Switzerland	26 015	4.3%	25 599	3.6%	27 369	3.6%	24 416	3.3%	24 033	3.5%	+ 3.2%
Norway	19 123	3.2%	18 323	2.6%	12 859	1.7%	7 983	1.1%	7 380	1.1%	- 2.0%
Ivory Coast	36 018	6.0%	37 210	5.3%	38 582	5.0%	37 744	5.1%	32 484	4.8%	- 6.4%
Bosnia-Herz.	39 896	6.7%	38 875	5.5%	34 711	4.5%	38 763	5.3%	38 008	5.6%	+ 7.0%
Israel	18 851	3.1%	41 535	5.9%	44 196	5.8%	47 812	6.5%	45 369	6.6%	+ 4.8%
Morocco	4 703	0.8%	7 517	1.1%	10 005	1.3%	11 430	1.6%	11 429	1.7%	+ 14.7%
Turkey	57 504	9.6%	71 030	10.1%	96 414	12.6%	95 550	13.0%	31 491	4.6%	- 66.2%
Angola	9 670	1.6%	13 550	1.9%	11 159	1.5%	11 519	1.6%	7 710	1.1%	- 32.1%
China	6 027	1.0%	10 804	1.5%	6 229	0.8%	7 457	1.0%	22 952	3.4%	+++
Vietnam	11 881	2.0%	22 308	3.2%	14 205	1.9%	9 171	1.3%	10 377	1.5%	+ 23.3%
Libya	19 691	3.3%	29 723	4.2%	27 848	3.6%	27 832	3.8%	20 656	3.0%	- 22.4%
Liechtenstein	1 966	0.3%	2 202	0.3%	2 033	0.3%	2 072	0.3%	1 692	0.2%	- 12.7%
Ceuta	4 013	0.7%	3 984	0.6%	2 731	0.4%	2 821	0.4%	2 795	0.4%	+ 6.9%
Other Destinations	192 585	32.2%	213 947	30.3%	239 301	31.3%	221 257	30.2%	240 150	35.2%	
Extra-EU	598 715		706 705		764 166		733 516		682 747		
% change			+ 18%		+ 8%		- 4%		+ 4.9%		

### EU exports of beef: Trade figures (COMEXT – tonnes cwe)

Destinations	2015		2016		2017		2018		Jan-Nov 19		Compared to Jan-Nov 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	45 198	10.7%	58 383	12.0%	90 659	17.1%	69 897	14.0%	60 112	12.5%	- 10.0%
Ghana	39 225	9.3%	39 680	8.1%	41 007	7.8%	39 906	8.0%	39 244	8.2%	+ 6.6%
Bosnia-Herz.	36 593	8.7%	36 790	7.6%	32 181	6.1%	36 152	7.2%	35 873	7.5%	+ 8.6%
Philippines	13 052	3.1%	24 454	5.0%	38 271	7.2%	29 794	6.0%	34 862	7.3%	+ 29.8%
Ivory Coast	36 016	8.6%	37 210	7.6%	38 572	7.3%	37 744	7.6%	32 484	6.8%	- 6.4%
Switzerland	25 006	5.9%	24 425	5.0%	26 231	5.0%	23 364	4.7%	23 028	4.8%	+ 3.4%
China	6 027	1.4%	10 804	2.2%	6 229	1.2%	7 457	1.5%	22 952	4.8%	+++
Israel	6 087	1.4%	15 056	3.1%	18 749	3.5%	22 207	4.4%	20 740	4.3%	+ 3.6%
Algeria	6 662	1.6%	10 726	2.2%	12 304	2.3%	13 919	2.8%	17 646	3.7%	+ 39.4%
Chile	50	0.0%	2 228	0.5%	8 961	1.7%	16 410	3.3%	12 131	2.5%	- 16.3%
Ukraine	2 747	0.7%	7 094	1.5%	6 926	1.3%	9 887	2.0%	11 589	2.4%	+ 29.3%
North Macedonia	12 375	2.9%	11 479	2.4%	11 285	2.1%	10 002	2.0%	10 397	2.2%	+ 12.6%
Vietnam	11 881	2.8%	22 308	4.6%	14 205	2.7%	9 171	1.8%	10 377	2.2%	+ 23.3%
South Africa	7 508	1.8%	7 335	1.5%	7 569	1.4%	12 113	2.4%	9 171	1.9%	- 20.9%
USA	2 633	0.6%	3 855	0.8%	4 576	0.9%	5 830	1.2%	7 801	1.6%	+ 42.3%
Angola	9 670	2.3%	13 550	2.8%	11 159	2.1%	11 519	2.3%	7 710	1.6%	- 32.1%
Japan	2 225	0.5%	3 265	0.7%	4 293	0.8%	3 355	0.7%	7 648	1.6%	+++
Other Destinations	157 866	37.5%	158 249	32.5%	155 847	29.5%	140 353	28.1%	115 604	24.1%	
Extra-EU	420 822		486 889		529 023		499 079		479 369		
% change			+ 16%		+ 9%		- 6%		+ 3.4%		

# TRADE

# EU IMPORTS

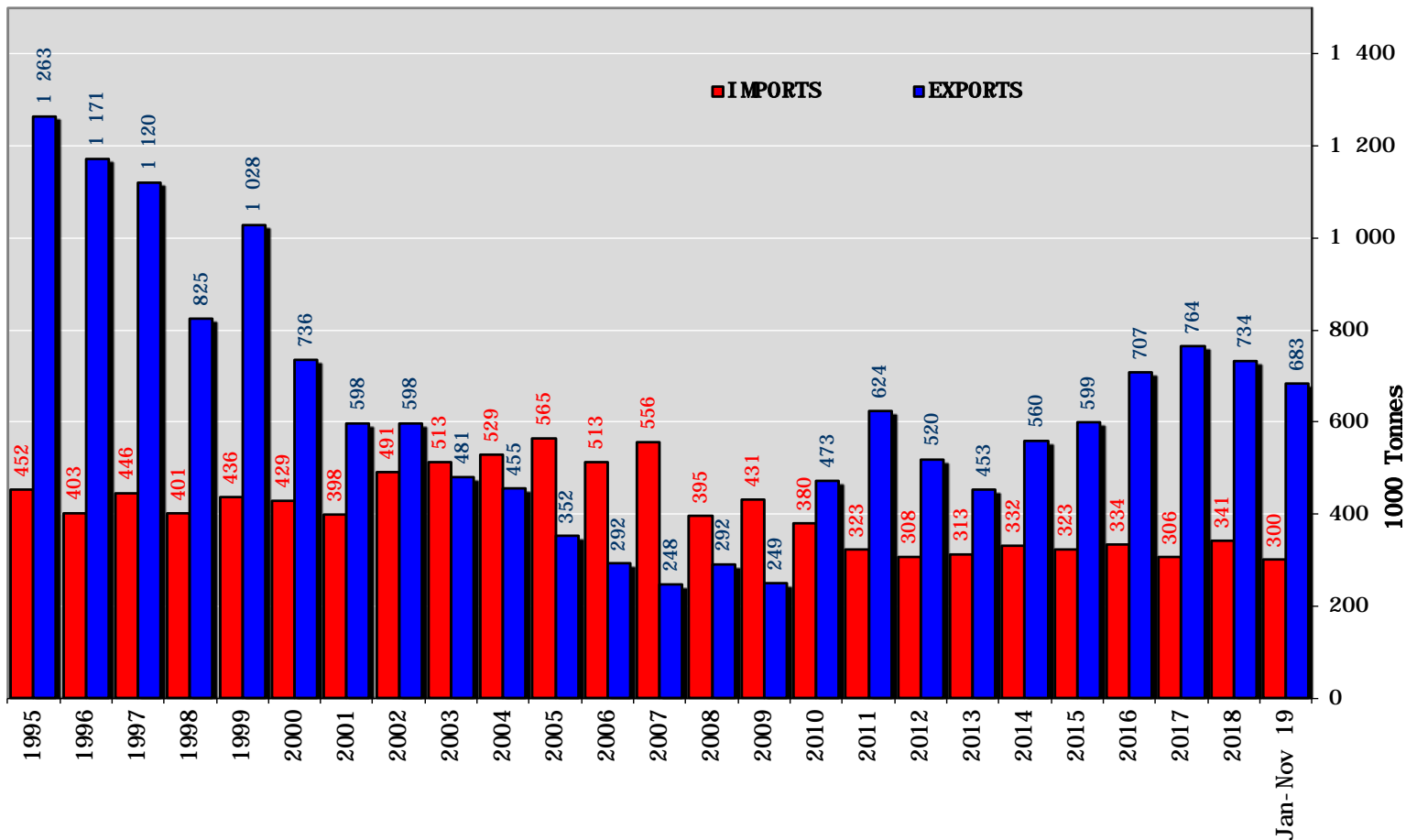
## Beef & Live Animals

### EU imports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

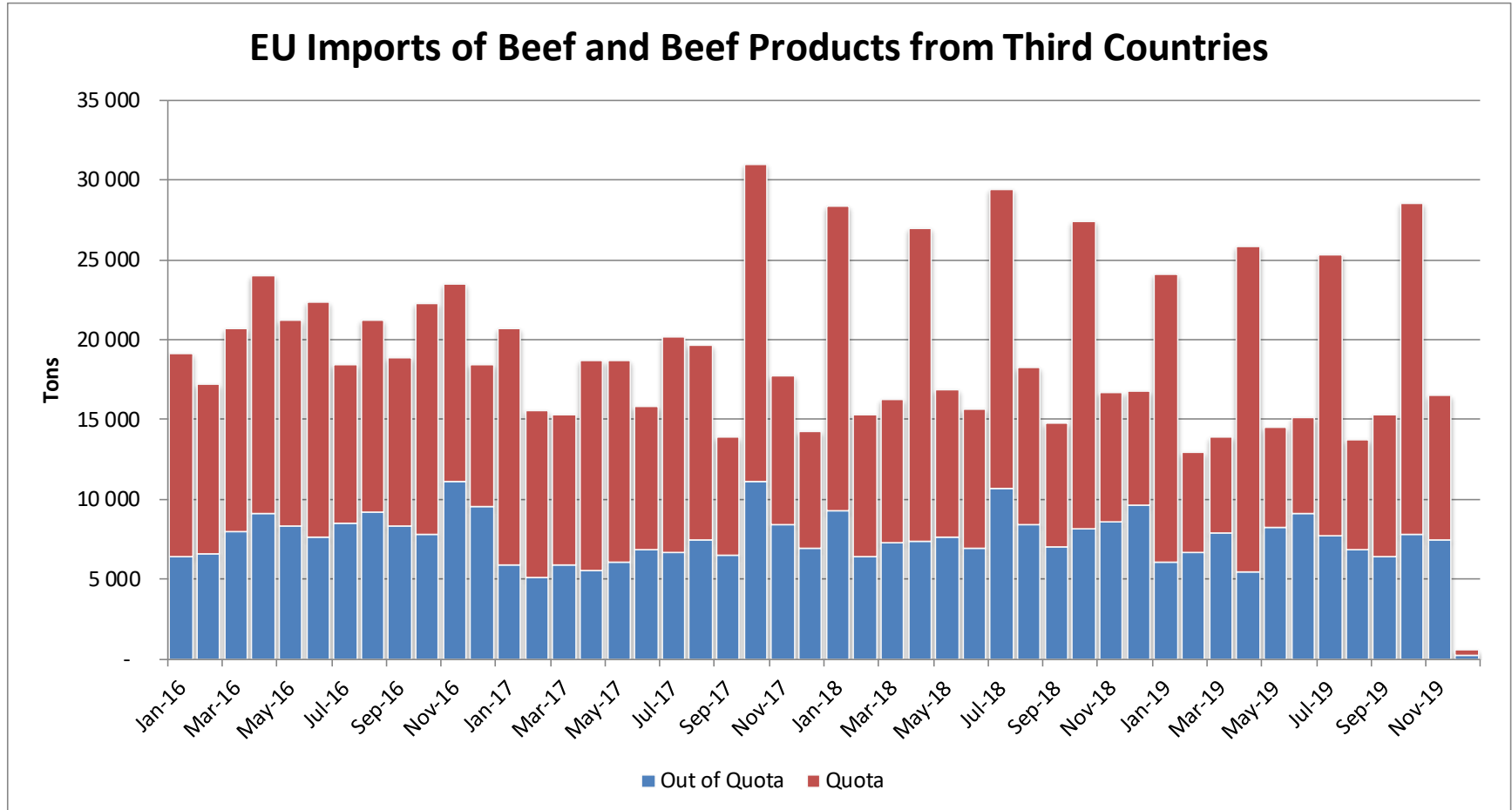
Origins	2015		2016		2017		2018		Jan-Nov 19		Compared to Jan-Nov 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	136 858	42.4%	140 319	42.0%	115 392	37.7%	140 243	41.1%	119 892	39.9%	- 6.8%
Argentina	42 149	13.0%	43 542	13.0%	49 890	16.3%	69 996	20.5%	66 798	22.2%	+ 4.5%
Uruguay	46 287	14.3%	56 747	17.0%	57 985	18.9%	52 462	15.4%	42 508	14.2%	- 13.7%
Australia	30 884	9.6%	27 850	8.3%	21 990	7.2%	20 868	6.1%	18 357	6.1%	- 10.0%
USA	24 132	7.5%	20 499	6.1%	21 624	7.1%	19 319	5.7%	16 634	5.5%	- 12.7%
Namibia	12 112	3.7%	10 686	3.2%	7 705	2.5%	5 585	1.6%	9 670	3.2%	+ 84.7%
New Zealand	11 380	3.5%	9 869	3.0%	8 093	2.6%	8 669	2.5%	7 086	2.4%	- 14.2%
Botswana	9 258	2.9%	9 382	2.8%	7 718	2.5%	7 025	2.1%	4 842	1.6%	- 23.8%
Paraguay	1 915	0.6%	5 979	1.8%	6 915	2.3%	6 287	1.8%	4 813	1.6%	- 16.5%
Switzerland	5 090	1.6%	5 500	1.6%	5 138	1.7%	5 437	1.6%	4 007	1.3%	- 18.3%
Canada	428	0.1%	421	0.1%	513	0.2%	1 343	0.4%	2 235	0.7%	+++
Serbia	439	0.1%	557	0.2%	565	0.2%	1 162	0.3%	950	0.3%	- 14.4%
Japan	359	0.1%	579	0.2%	693	0.2%	859	0.3%	947	0.3%	+ 18.6%
Other Origins	1 810	0.6%	2 022	0.6%	1 842	0.6%	1 797	0.5%	1 631	0.5%	
Extra-EU	323 099		333 952		306 064		341 053		300 370		
% change			+ 3%		- 8%		+ 11%		- 5.0%		

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### Trade balance of beef and live animals

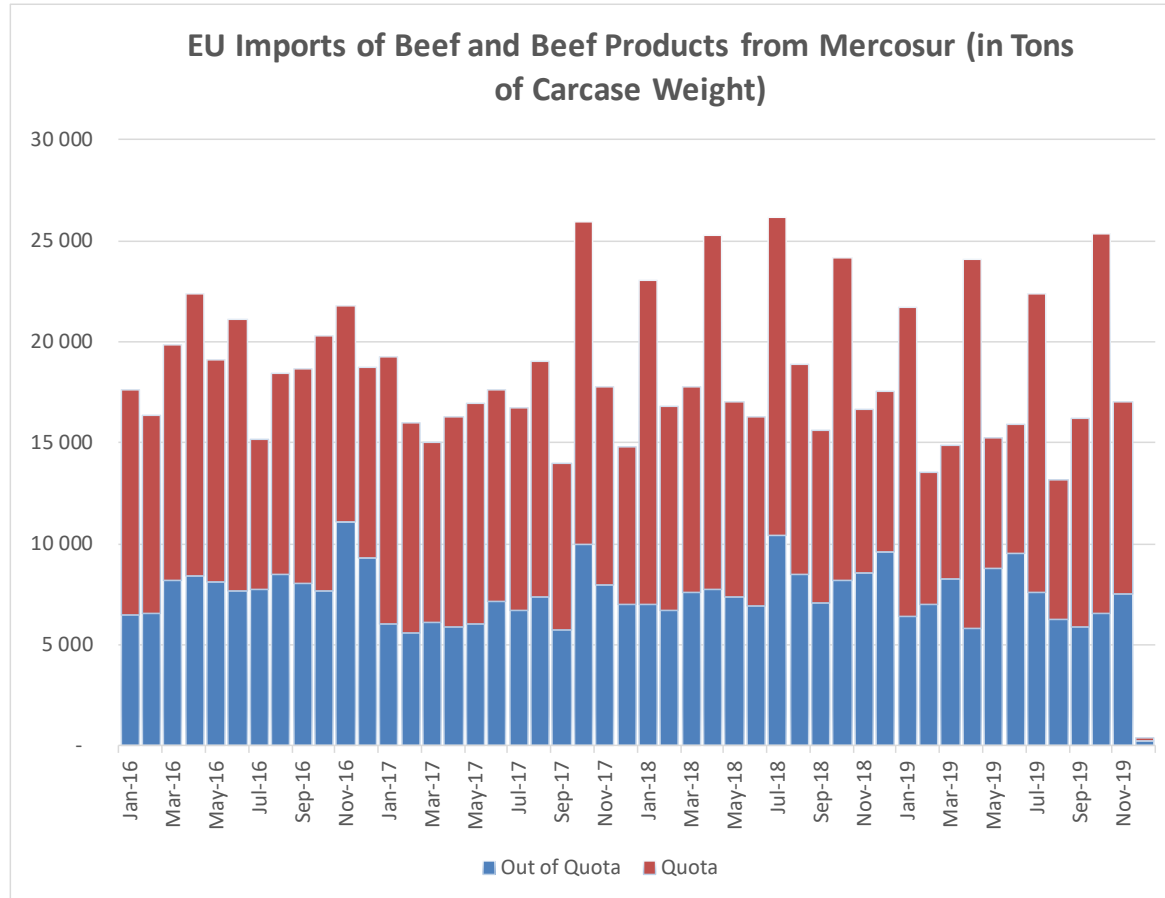


# Imports in and out of TRQs



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# Imports in and out of TRQs



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# High Quality Beef Import Quotas

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%		0.00%
09.4450	Argentina	29 500	28 091.29	95.22%	29 491.35	99.97%	14 334.94	48.59%
09.4451	Australia	7 150	5 333.48	74.59%	4 942.02	69.12%	2 080.44	29.10%
09.4452	Uruguay	6 376	6 363.24	99.80%	6 363.76	99.81%	2 217.37	34.78%
09.4453	Brazil	10 000	5 057.27	50.57%	4 147.19	41.47%	1 959.46	19.59%
09.4454	New Zealand	1 300	1 122.25	86.33%	980.60	75.43%	475.76	36.60%
09.4002	Canada/US	11 500	2 351.37	20.45%	3 883.04	33.77%	2 110.58	18.35%
09.4455	Paraguay	1 000	962.21	96.22%	935.41	93.54%	373.32	37.33%
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 30/11/2019

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# High Quality Beef Import Quotas

Quota erga omnes

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%	

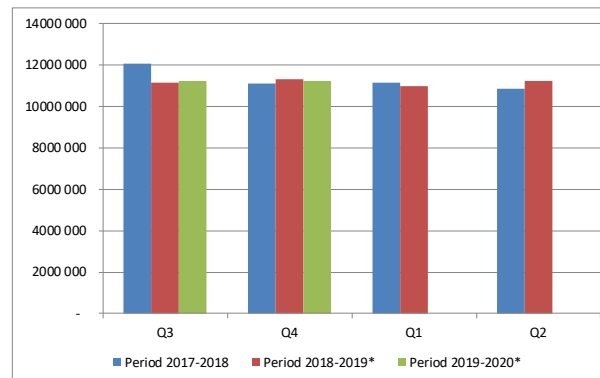
	2016-Q3	2016-Q4	2017-Q1	2017-Q2	TOTAL
Period 2016-2017	12 059 567	12 062 828	12 015 258	12 095 591	48 233 243
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	100.00%	100.00%	99.71%	100.00%	100.00%
Available after transfer	12 050 000	12 040 433	12 027 606	12 062 348	
	100.00%	100.00%	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	11 253 977	-	-	22 500 394
Available	11 250 000	11 250 000	11 250 000	11 250 000	45 000 000
Use	99.97%	100.00%			50.00%
Available after transfer	11 250 000	11 250 000			
	99.97%	100.00%			

\* Until 09.12.2019



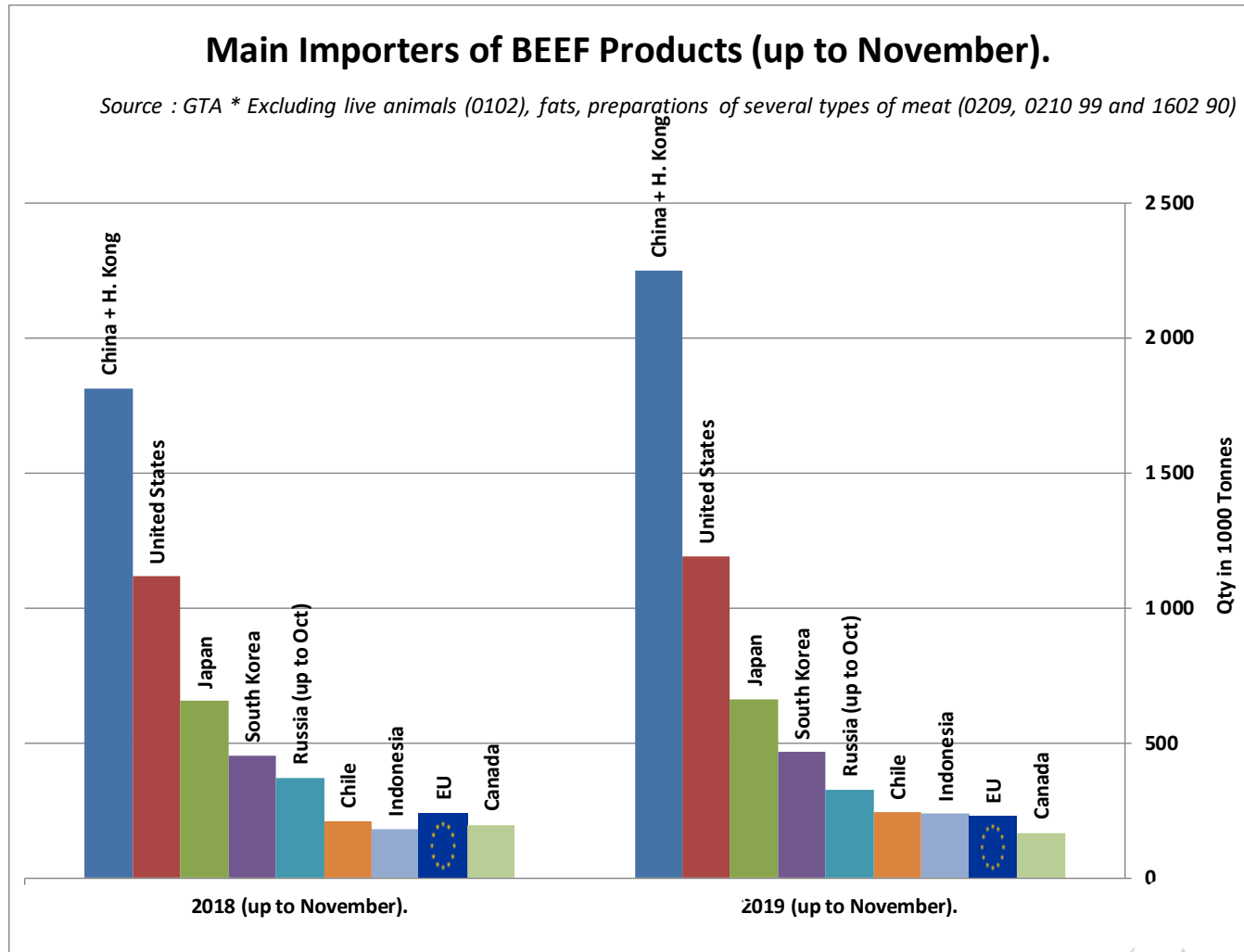
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# WORLD BEEF MARKET

# E.U. IMPORTS BEEF MAIN IMPORTERS

Source : GTA

\* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



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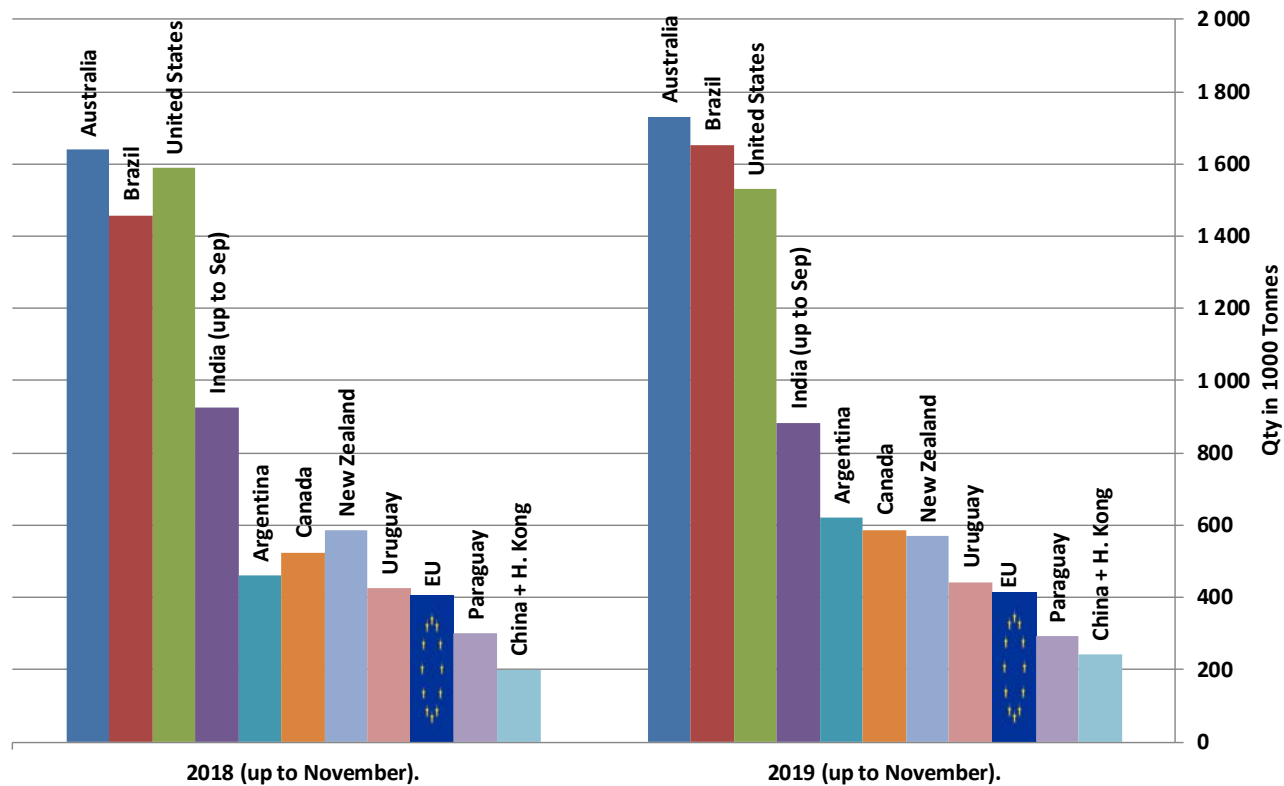
# WORLD BEEF MARKET

# E.U. EXPORTS BEEF MAIN EXPORTERS

Source : GTA \* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)

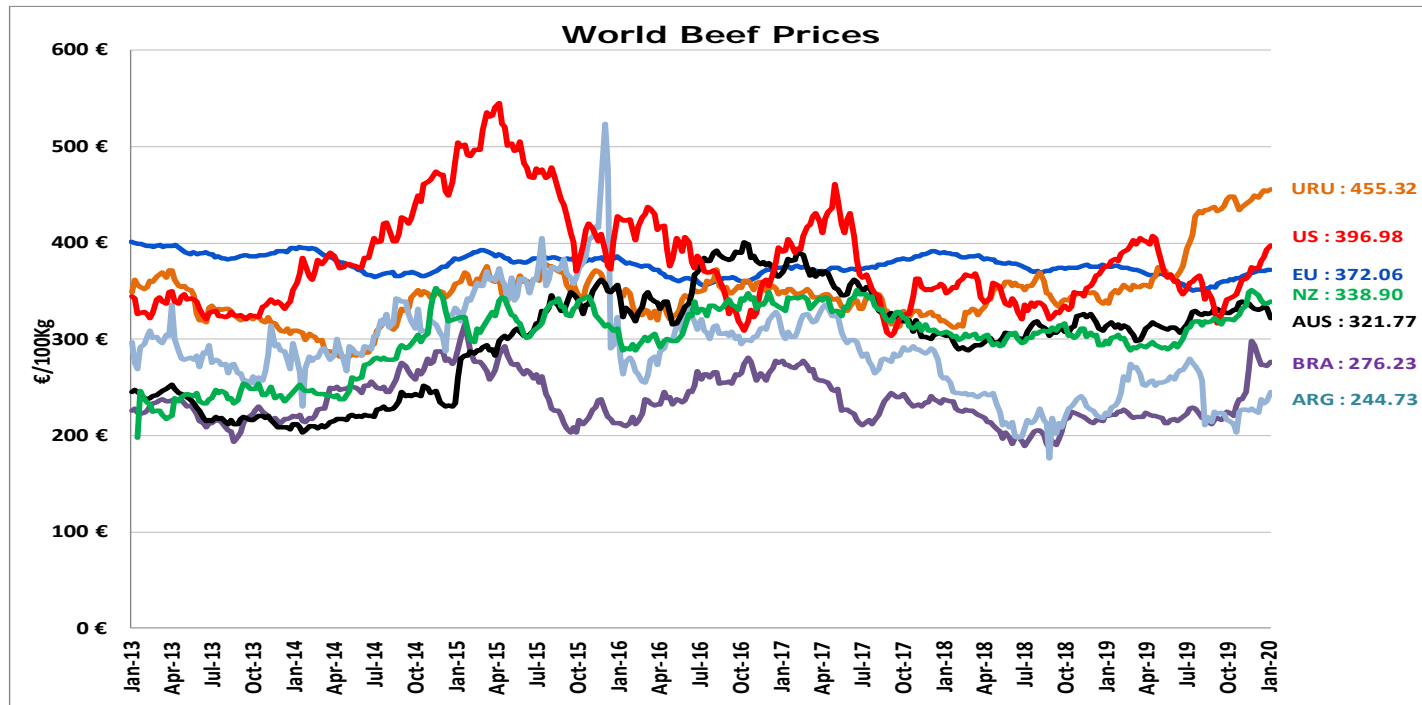
## Main Exporters of BEEF Products (up to November).

Source : GTA \* Excluding live animals (0102), fats, preparations of several types of meat (0209, 0210 99 and 1602 90)



# 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/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](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/>