European Commission

BEEF & VEAL MARKET SITUATION

CMO Committee

19 March 2015

Agriculture and Rural Development

LIVESTOCK

DECEMBER SURVEY

E.U. EVOLUTION

TOTAL BOVINE

European Commission

Dec 1000 Hd	TOTAL LIVESTOCK 2011	2012	2013	2014	%Var 2014 2013	BOVINE < 1 Year 2011	2012	2013	2014	%Var 2014 2013	BOVINE 1-2 Year 2011	2012	2013	2014	%Var 2014 2013	BOVINE > 2 Year 2011	2012	2013	2014	%Var 2014 2013
BE	2 472	2 438	2 441	2 477	+1.5%	678	733	718	745	+3.8%	494	484	490	490	+0.0%	1 299	1 222	1 234	1 243	+0.7%
BG	568	535	586	562	-4.0%	142	121	150	121	-19.6%	59	64	62	65	+5.9%	367	350	374	376	+0.6%
CZ	1 339	1 321	1 332	1 373	+3.1%	392	395	390	413	+5.7%	299	298	300	311	+3.9%	648	628	642	649	+1.1%
DK	1 612	1 607	1 583	1 553	-1.9%	548	545	528	534	+1.1%	306	314	319	307	-3.8%	758	748	736	713	-3.1%
DE	12 528	12 507	12 686	12 742	+0.4%	3 851	3 868	3 878	3 909	+0.8%	2 931	2 940	3 015	3 011	-0.1%	5 746	5 699	5 793	5 823	+0.5%
EE	238	246	261	265	+1.3%	63	66	71	73	+2.8%	47	50	54	55	+2.2%	128	131	137	137	+0.2%
IE	5 925	6 253	6 309	6 243	-1.0%	1 868	1 987	1 893	1 886	-0.4%	1 442	1 617	1 714	1 649	-3.8%	2 615	2 650	2 701	2 709	+0.3%
EL	681	685	653	652	-0.2%	191	202	167	165	-1.2%	125	131	129	130	+0.8%	365	351	357	357	idem
ES	5 923	5 813	5 697	6 068	+6.5%	2 078	2 122	2 057	2 297	+11.7%	775	714	732	744	+1.6%	3 070	2 977	2 908	3 028	+4.1%
FR	19 129	19 052	19 129	19 253	+0.6%	5 525	5 541	5 453	5 529	+1.4%	3 311	3 378	3 441	3 418	-0.7%	10 292	10 133	10 235	10 306	+0.7%
HR	447	452	442	404	-8.6%	146	143	145	125	-13.8%	90	101	92	85	-7.6%	210	208	205	194	-5.4%
IT	6 252	6 252	6 249	6 125	-2.0%	1 783	1 598	1 680	1 654	-1.6%	1 394	1 421	1 457	1 366	-6.2%	2 721	3 072	3 112	3 106	-0.2%
CY	57	57	57	60	+4.2%	21	21	21	22	+3.6%	10	10	9	10	+9.7%	26	26	27	28	+2.4%
LV	381	393	406	422	+3.8%	104	108	109	118	+8.3%	67	70	75	75	-0.6%	210	215	222	229	+3.1%
LT	752	729	714	737	+3.3%	201	193	187	192	+3.1%	144	145	144	149	+4.0%	408	391	383	395	+3.1%
LU	188	188	198	201	+1.5%	52	52	55	54	-1.4%	43	43	45	47	+2.8%	93	93	98	100	+2.5%
HU	697	760	782	802	+2.6%	188	213	212	219	+3.3%	137	159	179	176	-1.7%	372	389	393	407	+3.6%
MT	15	16	15	15	-2.2%	4	5	4	4	+4.2%	3	4	4	3	-15.7%	7	7	7	7	+1.1%
NL	3 912	3 985	4 090	4 169	+1.9%	1 581	1 623	1 653	1 676	+1.4%	591	603	627	657	+4.8%	1 740	1 760	1 810	1 836	+1.4%
AT	1 977	1 956	1 958	1 961	+0.1%	623	629	627	629	+0.4%	430	424	435	432	-0.5%	923	903	897	899	+0.3%
PL	5 501	5 520	5 590	5 660	+1.3%	1 362	1 388	1 409	1 450	+2.9%	1 256	1 324	1 372	1 445	+5.3%	2 883	2 809	2 809	2 765	-1.6%
PT	1 519	1 498	1 471	1 542	+4.9%	462	451	425	480	+12.9%	210	206	211	214	+1.2%	847	840	834	848	+1.7%
RO	1 989	2 009	2 022	2 063	+2.0%	452	458	454	462	+1.7%	220	235	238	243	+2.1%	1 317	1 316	1 331	1 358	+2.1%
SI	462	460	461	468	+1.6%	146	147	144	148	+2.6%	119	120	123	122	-0.5%	197	193	194	198	+2.3%
SK	463	471	468	465	-0.7%	133	136	133	130	-2.1%	91	95	98	92	-5.7%	239	240	238	243	+2.2%
FI	903	901	903	907	+0.4%	304	301	302	307	+1.7%	222	225	224	223	-0.5%	377	376	378	378	-0.0%
SE	1 450	1 444	1 444	1 436	-0.5%	480	475	469	473	+0.9%	330	338	342	334	-2.3%	640	630	632	629	-0.5%
UK	9 675	9 749	9 682	9 693	+0.1%	2 857	2 921	2 803	2 842	+1.4%	2 344	2 395	2 411	2 332	-3.3%	4 474	4 433	4 468	4 520	+1.2%
EU	87 054	87 297	87 629	88 320	+0.8%	26 235	26 441	26 137	26 656	+2.0%	17 491	17 907	18 339	18 184	-0.8%	42 973	42 789	43 155	43 481	+0.8%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2013 AND 2014

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Agriculture and Rural Development

LIVESTOCK

DECEMBER SURVEY

European Commission

E.U. EVOLUTION COWS

Dec 1000 Hd	TOTAL COWS				%Var 2014 2013	DAIRY COWS				%Var 2014 2013	OTHER COWS				%Var 2014 2013
	2011	2012	2013	2014		2011	2012	2013	2014		2011	2012	2013	2014	
BE	999	945	945	956	+1.1%	511	504	516	519	+0.6%	489	441	429	436	+1.7%
BG	336	323	353	351	-0.6%	313	294	313	302	-3.7%	23	29	40	49	+23.8%
CZ	557	543	553	566	+2.4%	374	367	375	372	-0.8%	183	175	178	194	+9.2%
DK	681	678	664	643	-3.2%	579	579	567	547	-3.5%	102	100	97	96	-1.0%
DE	4 874	4 863	4 941	4 969	+0.6%	4 190	4 190	4 268	4 296	+0.7%	684	672	673	674	+0.1%
EE	111	112	118	118	+0.2%	96	97	98	95	-2.9%	15	15	20	23	+15.2%
IE	2 119	2 188	2 168	2 169	+0.1%	1 036	1 060	1 082	1 128	+4.2%	1 083	1 128	1 085	1 041	-4.0%
EL	290	278	289	299	+3.5%	130	132	130	133	+2.3%	160	146	159	166	+4.4%
ES	2 619	2 608	2 628	2 747	+4.5%	798	827	857	862	+0.6%	1 821	1 780	1 771	1 884	+6.4%
FR	7 812	7 757	7 804	7 835	+0.4%	3 664	3 644	3 697	3 697	idem	4 148	4 114	4 106	4 138	+0.8%
HR	196	195	181	179	-1.1%	185	181	168	158	-6.0%	11	14	13	20	+53.8%
IT	2 145	2 391	2 410	2 398	-0.5%	1 755	2 009	2 075	2 069	-0.2%	390	382	335	329	-1.9%
CY	24	24	25	25	+3.2%	24	24	25	25	+3.1%	0	0	0	0	idem
LV	186	190	194	200	+3.0%	164	165	165	166	+0.5%	22	26	29	34	+17.3%
LT	368	352	345	351	+1.6%	350	331	316	314	-0.5%	18	21	29	37	+24.6%
LU	75	74	78	75	-3.6%	44	45	48	47	-3.1%	30	29	30	29	-4.5%
HU	329	339	345	359	+4.1%	252	255	250	255	+2.0%	77	83	96	104	+8.3%
MT	6	6	6	7	+2.6%	6	6	6	7	+2.7%	0	0	1	0	-89.4%
NL	1 611	1 643	1 683	1 694	+0.7%	1 504	1 541	1 597	1 610	+0.8%	107	102	86	84	-2.3%
AT	784	772	766	768	+0.2%	527	523	530	538	+1.5%	257	248	237	230	-2.8%
PL	2 568	2 469	2 442	2 403	-1.6%	2 446	2 346	2 299	2 248	-2.2%	122	123	143	155	+8.6%
PT	683	678	677	697	+2.8%	242	237	231	233	+1.1%	441	442	446	463	+3.7%
RO	1 189	1 180	1 187	1 211	+2.0%	1 170	1 163	1 169	1 192	+2.0%	19	17	18	18	+2.8%
SI	171	168	166	168	+1.5%	109	111	110	108	-1.6%	62	57	56	60	+7.6%
SK	201	203	199	201	+1.1%	154	150	145	143	-1.6%	47	53	54	59	+8.4%
FI	337	336	338	340	+0.6%	282	280	282	283	+0.3%	56	56	56	57	+1.9%
SE	530	524	522	517	-0.8%	348	346	346	344	-0.6%	182	178	175	173	-1.3%
UK	3 442	3 388	3 371	3 419	+1.4%	1 800	1 786	1 817	1 883	+3.6%	1 642	1 603	1 554	1 536	-1.2%
EU	35 243	35 225	35 396	35 664	+0.8%	23 053	23 193	23 481	23 574	+0.4%	12 190	12 034	11 916	12 089	+1.5%

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Source : EStat Newcronos

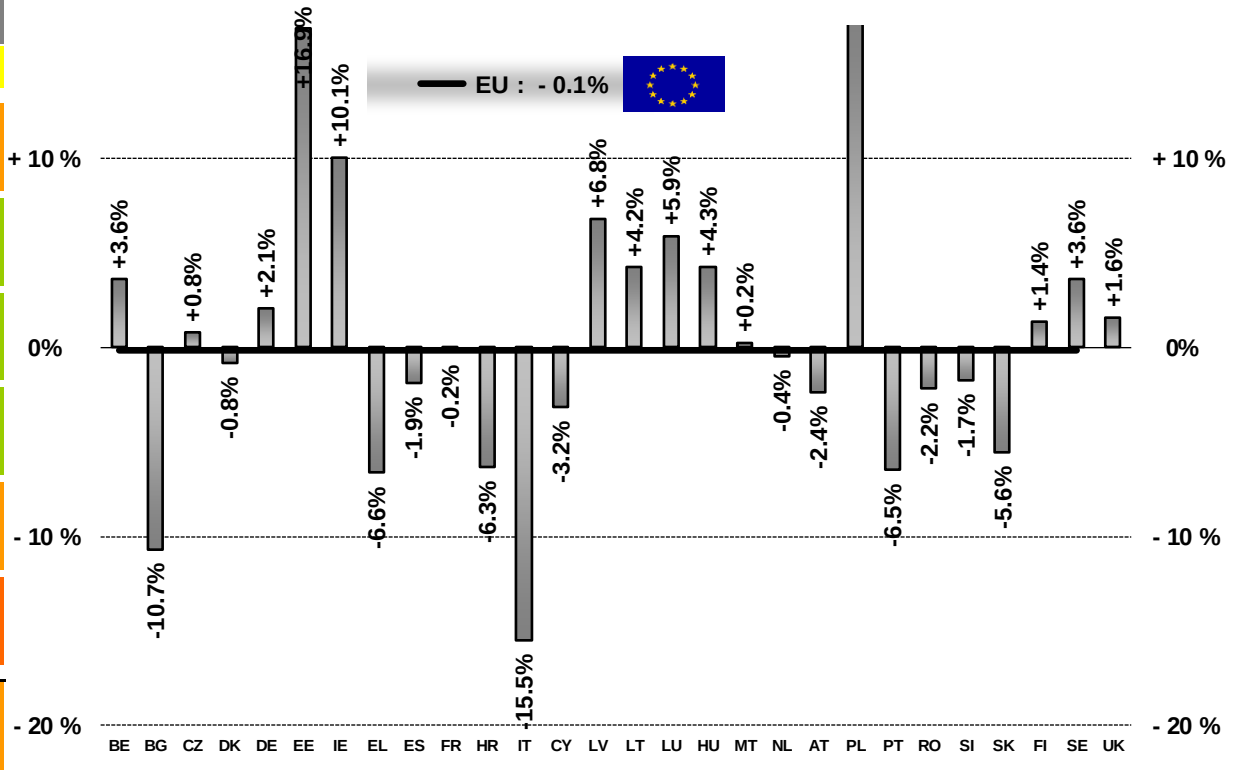
Agriculture and Rural Development

EU %Var is calculated considering only countries available in 2013 AND 2014

PRODUCTION % EVOLUTION HEADS

European Commission

HEADS	Jan-Dec 13/14	
	EU15	EU28
Bull	-5.1%	-2.3%
Bullock	+8.8%	+8.7%
Cow	+1.2%	+2.5%
Heifer	+0.3%	+1.4%
Calve	-1.3%	-2.0%
Young cattle	-8.5%	-8.6%
Meat of bovine animals	-1.2%	-0.1%



Estimates for last month of period : HR

Source : EStat - Newcronos

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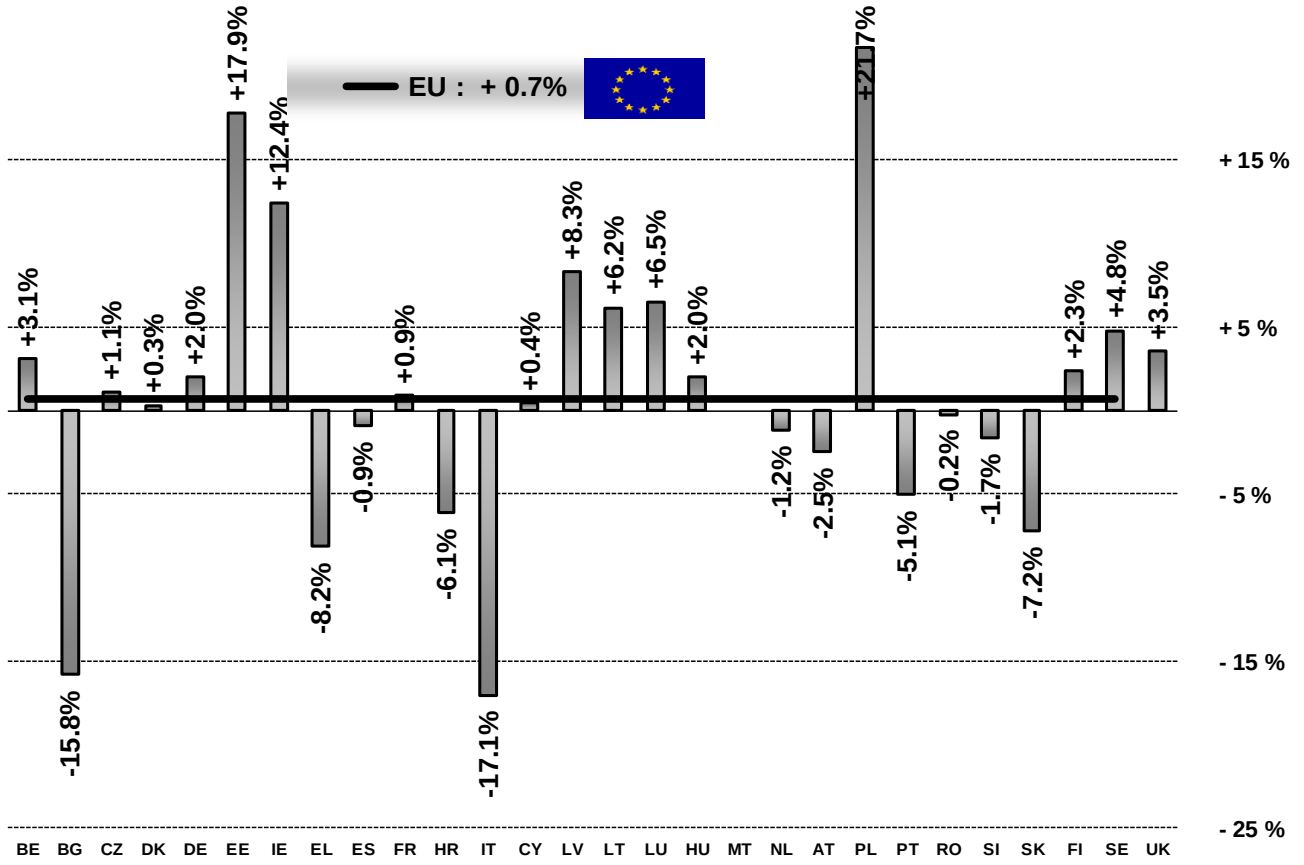
PRODUCTION

% EVOLUTION TONNES

European Commission

TONNES	Jan-Dec 13/14	
	EU15	EU28
Bull	-4.6%	-2.3%
Bullock	+9.9%	+9.9%
Cow	+2.0%	+3.1%
Heifer	+2.0%	+2.8%
Calve	-1.3%	-1.8%
Young cattle	-8.6%	-8.6%
Meat of bovine animals	-0.4%	+0.7%



Estimates for last month of period : HR

Source : EStat - Newcronos

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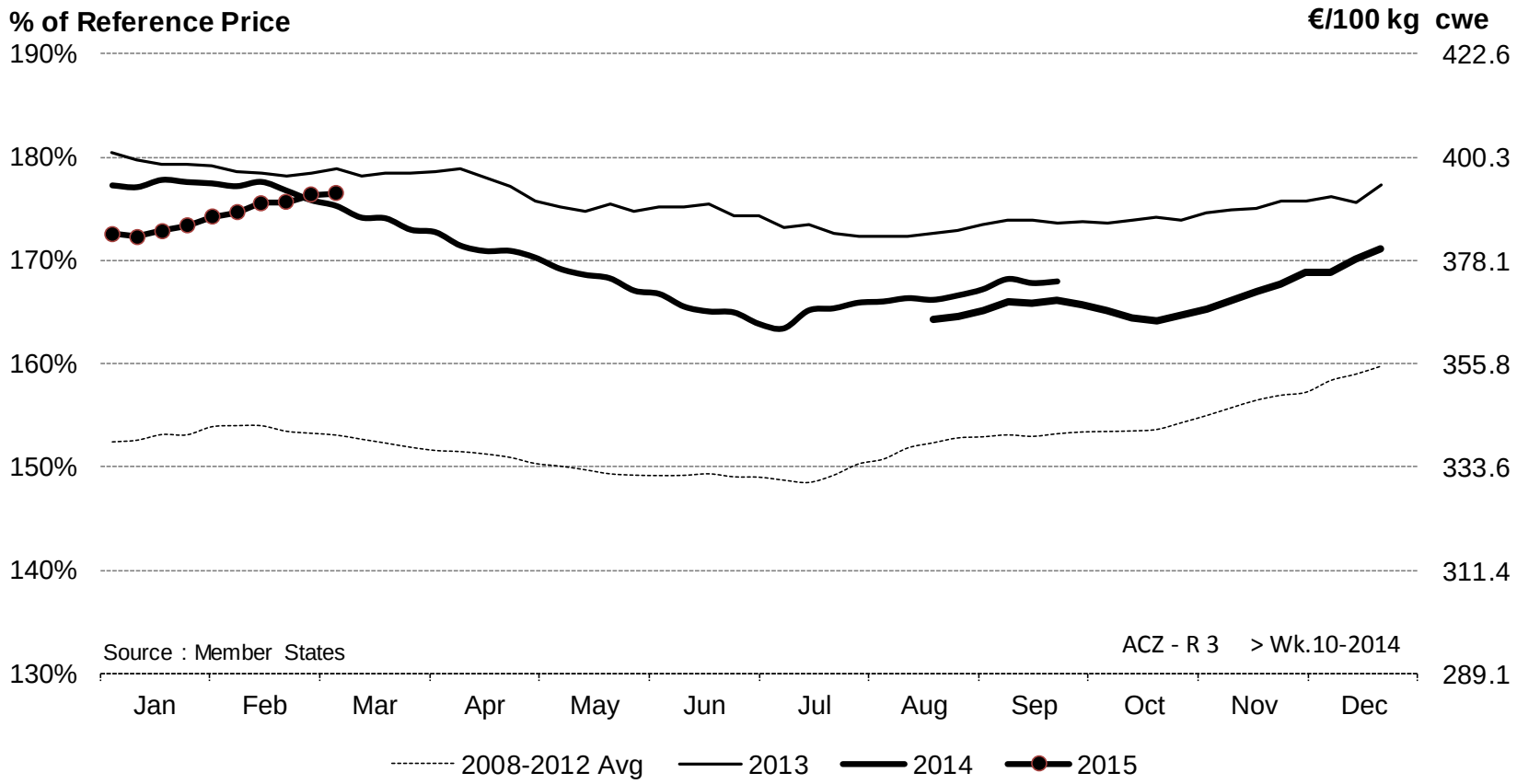
PRICES CARCASSES

E.U. EVOLUTION A/C/Z.R3

European Commission

ACZ - R 3 > Wk.10-2014



Price in week 10 :	**392.47**	Average price in February 2015 :	**390.11**
% change y/y :	**+ 0.7%**	% change y/y :	**- 0.9%**
% Ref. Price in wk 10 :	**176.5%**		

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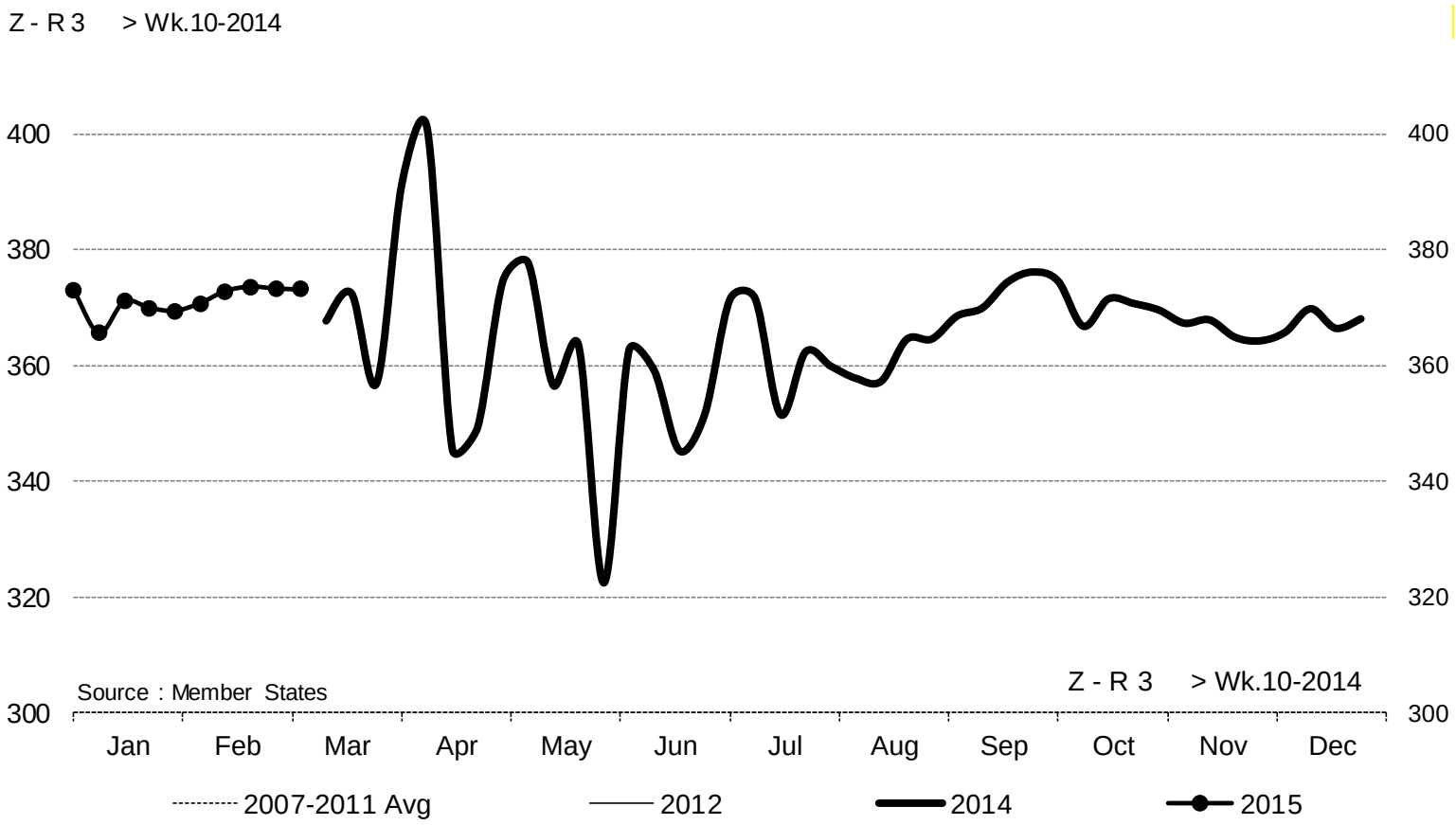
PRICES CARCASSES

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



Price in week 10 : **373.18**

Average price in February 2015 : **372.40**

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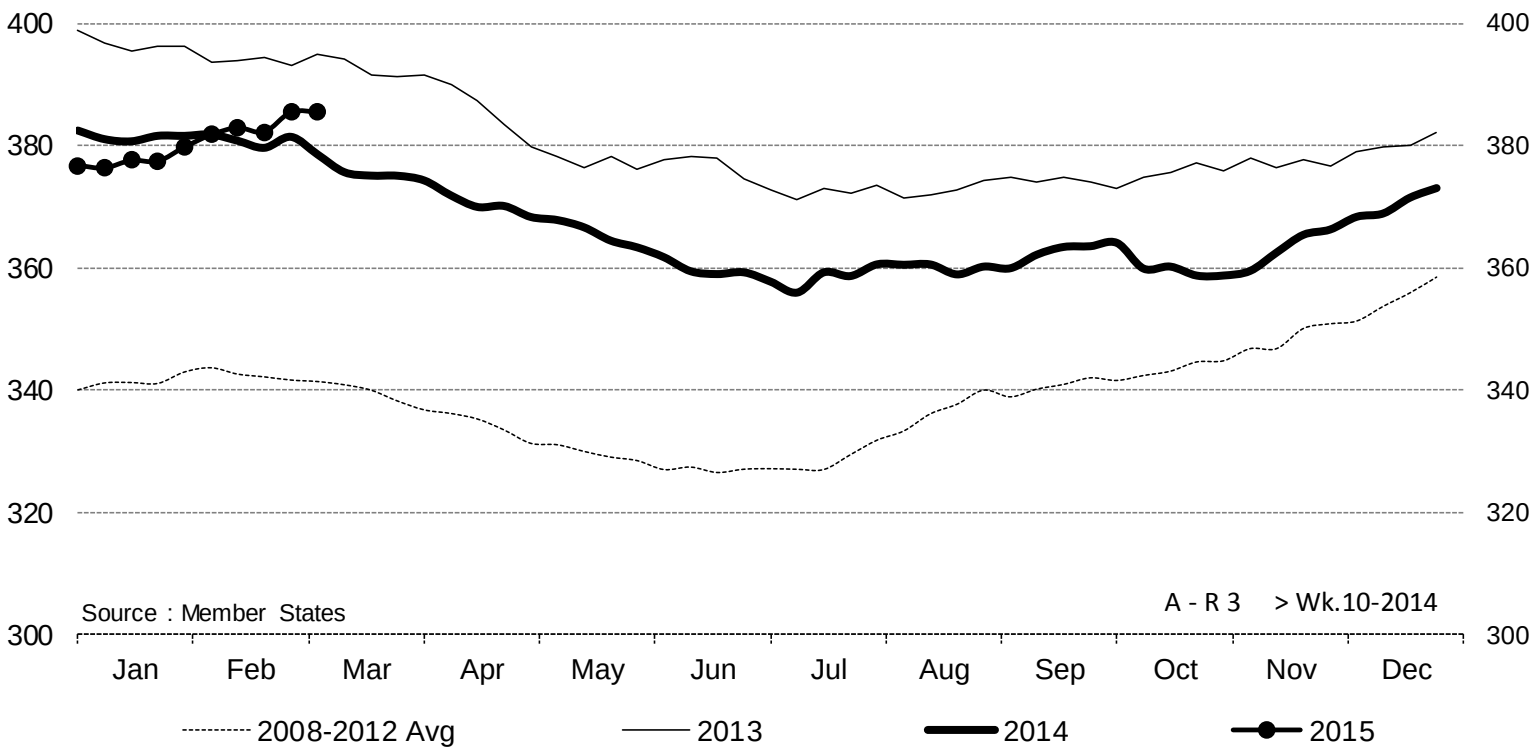
PRICES CARCASSES

E.U. EVOLUTION YOUNG BULL – A.R3

European Commission

A - R 3 > Wk.10-2014



Price in week 10 :	**385.52**	Average price in February 2015 :	**382.74**
% change y/y :	**+ 1.8%**	% change y/y :	**+ 0.5%**

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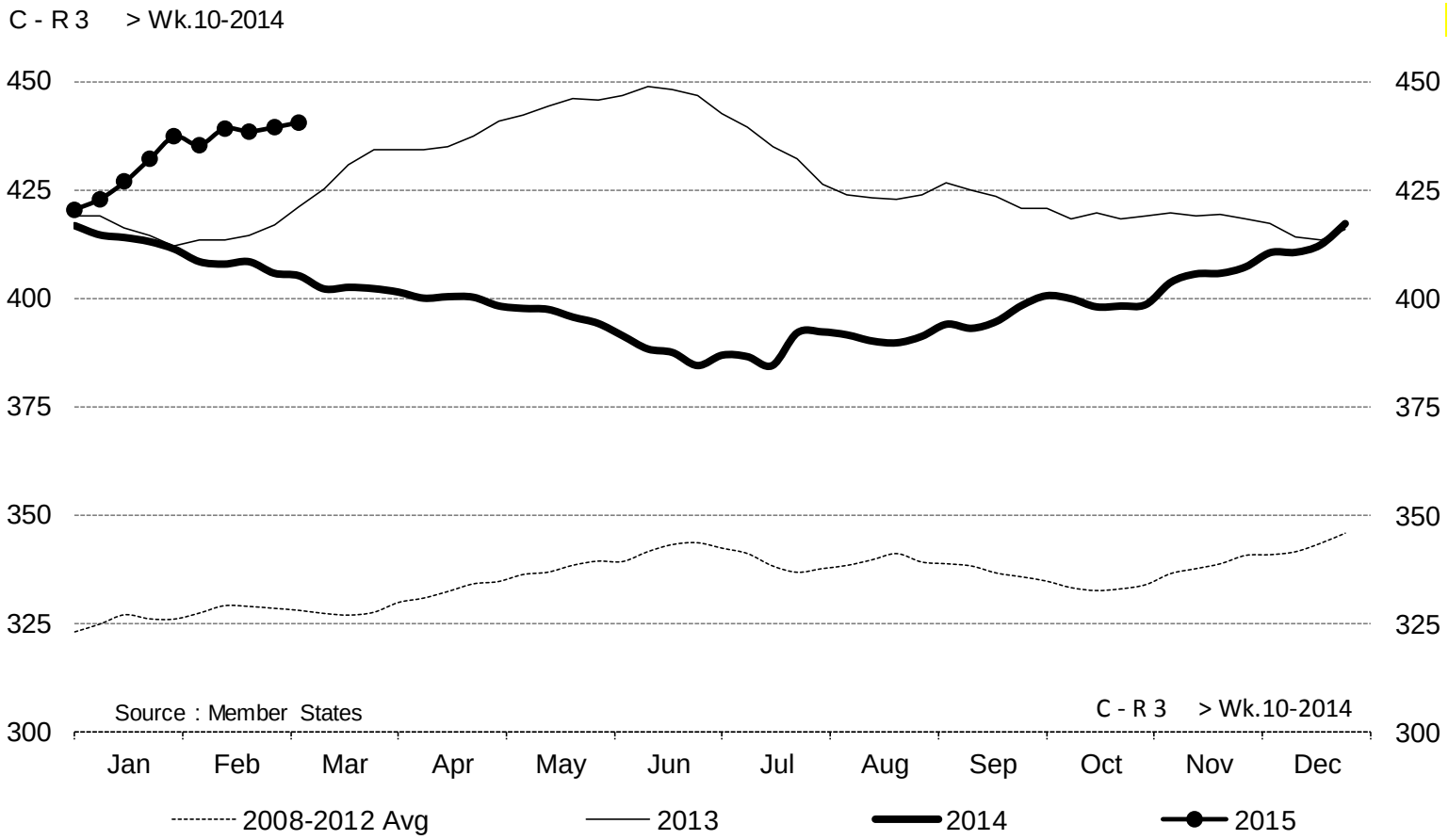
PRICES CARCASSES

E.U. EVOLUTION STEER – C.R3



Price in week 10 :	**440.54**	Average price in February 2015 :	**437.90**
% change y/y :	**+ 8.7%**	% change y/y :	**+ 7.3%**

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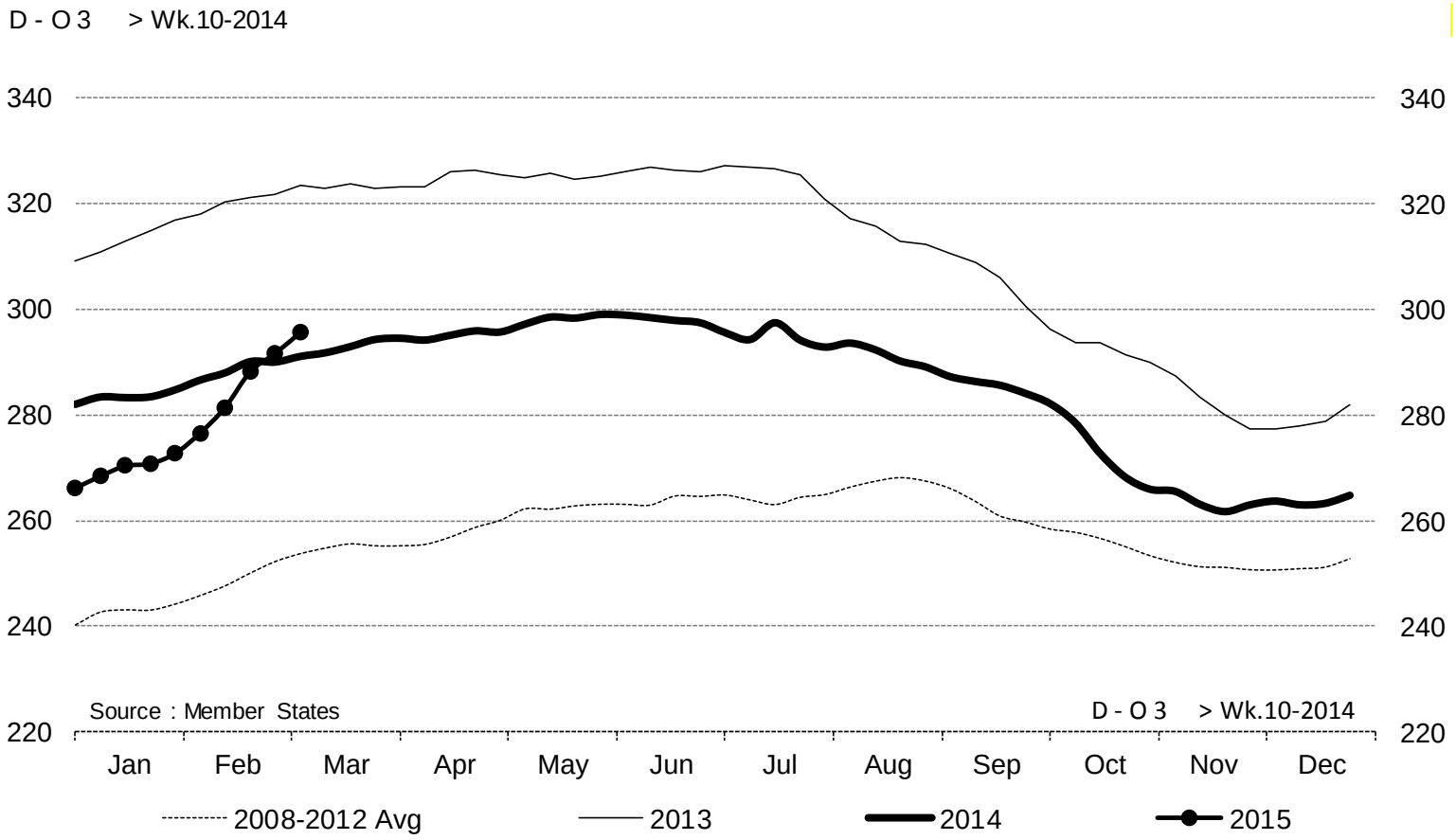
PRICES CARCASSES

E.U. EVOLUTION COW – D.O3



Price in week 10 :	**295.63**	Average price in February 2015 :	**283.14**
% change y/y :	**+ 1.6%**	% change y/y :	**- 1.8%**

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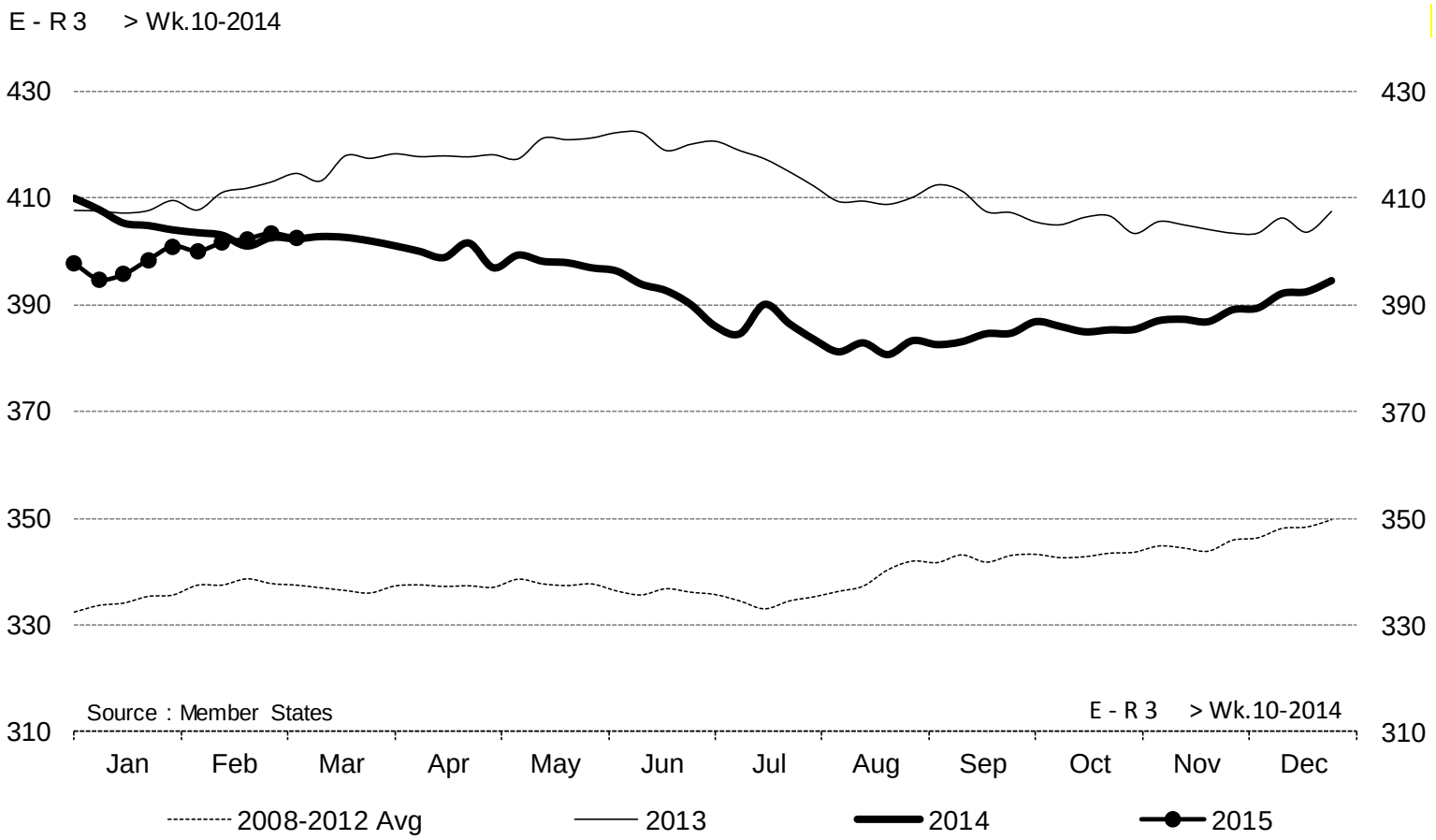
PRICES CARCASSES

E.U. EVOLUTION HEIFER – E.R3



Price in week 10 :	**402.55**	Average price in February 2015 :	**401.72**
% change y/y :	**+ 0.0%**	% change y/y :	**- 0.2%**

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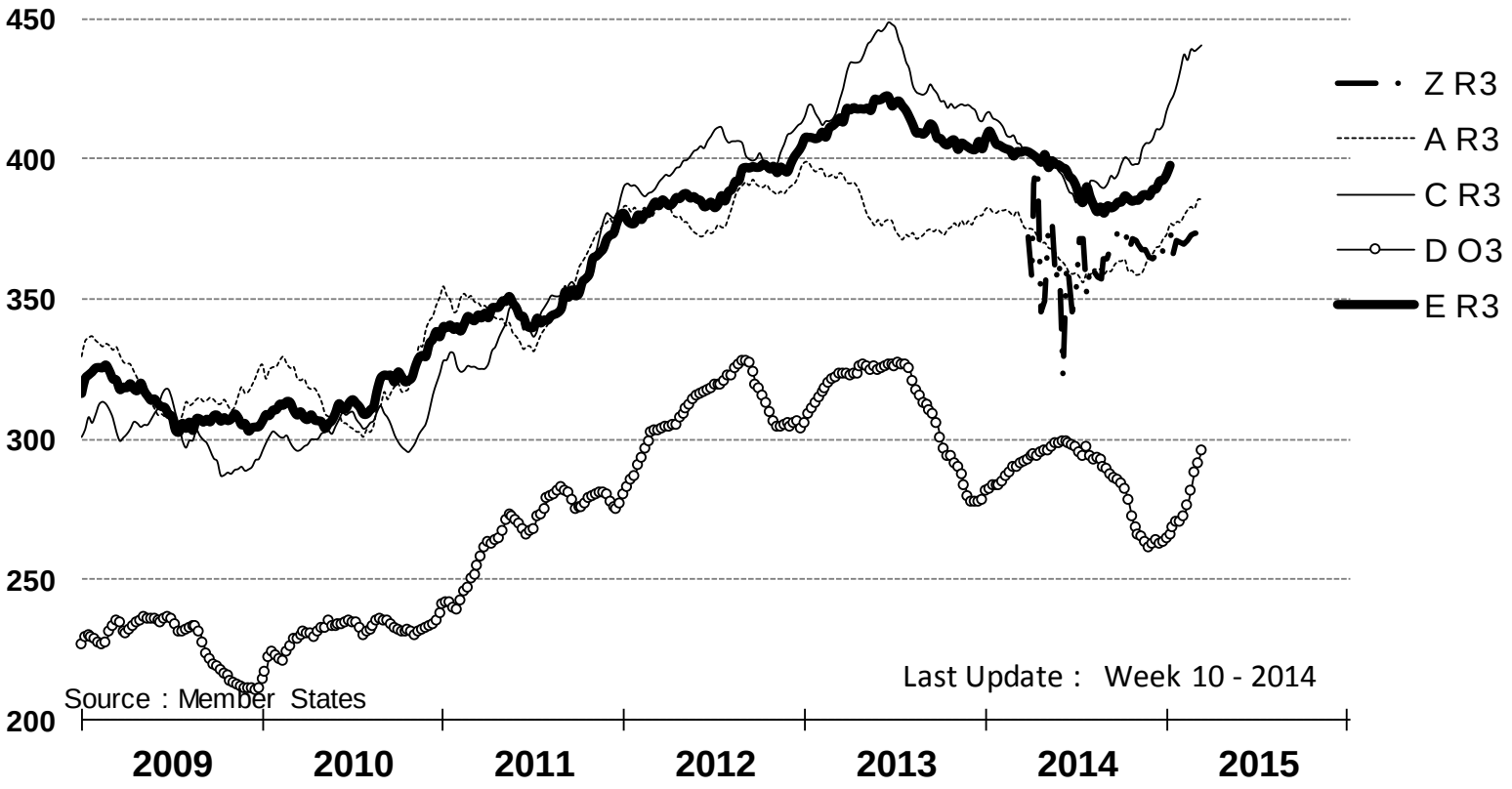
Agriculture and Rural Development

PRICES CARCASSES

E.U. EVOLUTION All CAT GLOBAL VIEW



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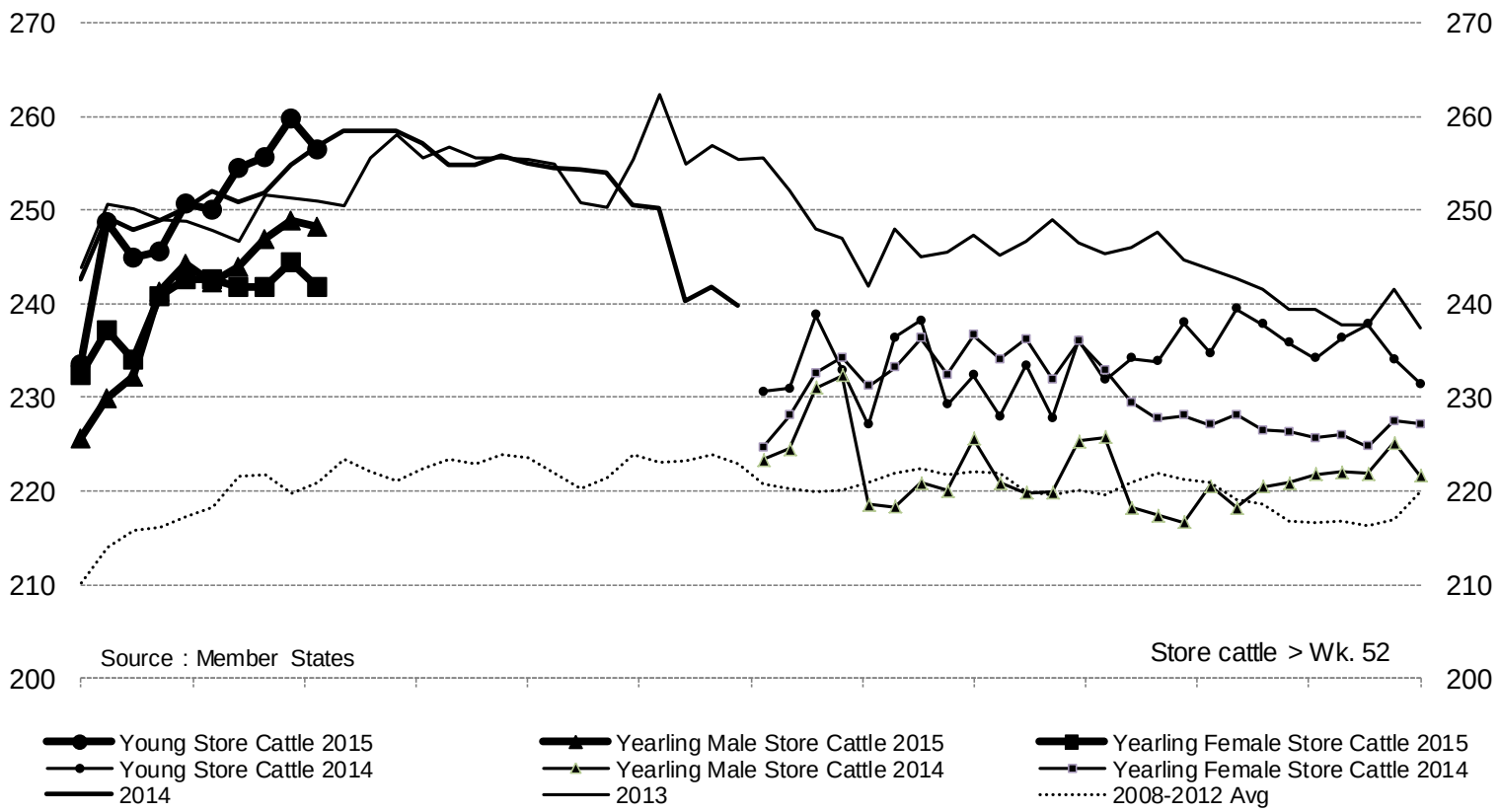
PRICES
LIVE BOVINES

European Commission

E.U. EVOLUTION
MALE STORE CATTLE

Store cattle (€/100 kg live weight)



Young Store Cattle Price in	**Week 10**	**2.56**	**Yearling Male Store Cattle Price in**	**Week 10**	**2.48**
Yearling Female Store Cattle Price in	**Week 10**	**2.42**			€/kg live weight

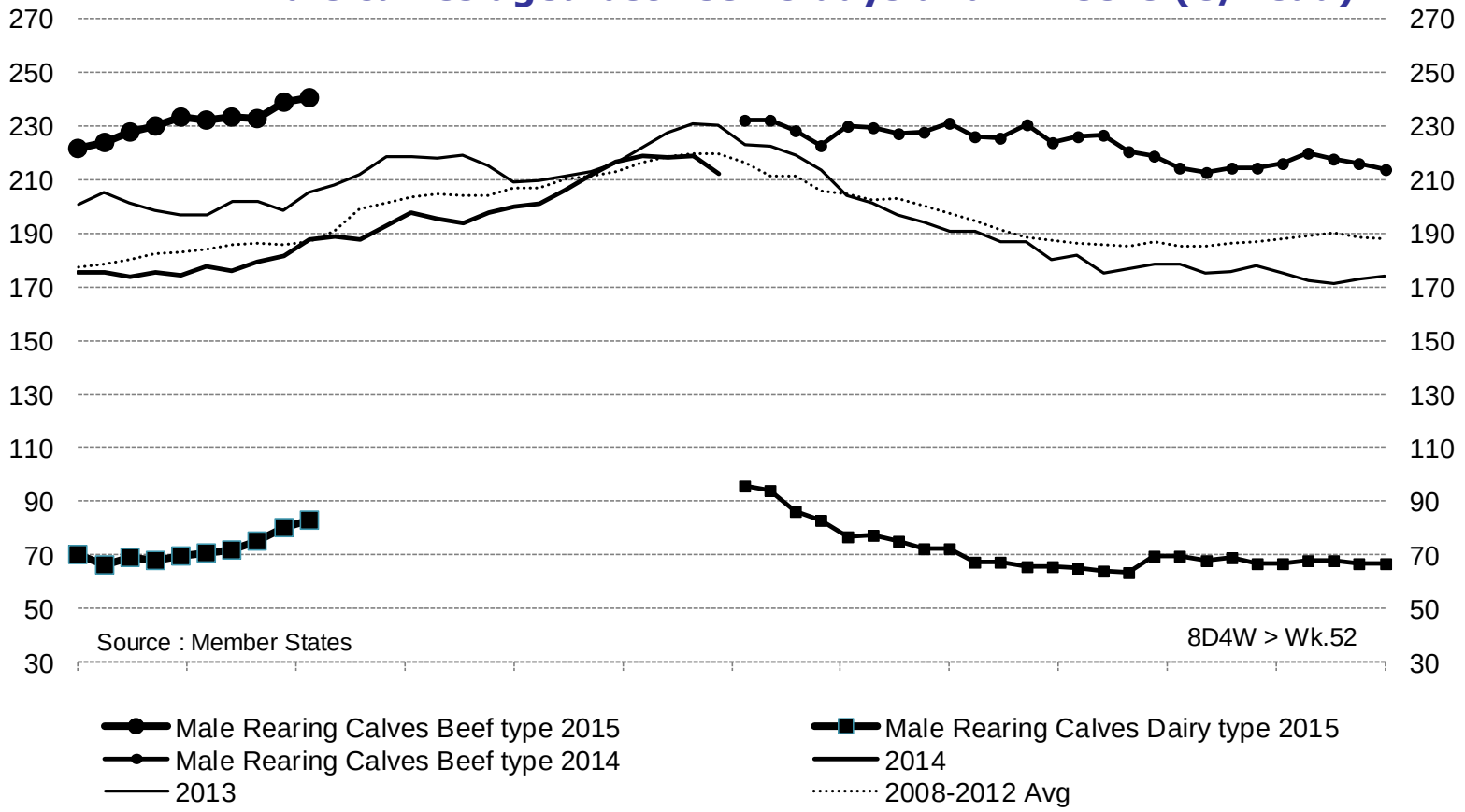
Agriculture and Rural Development

PRICES
LIVE BOVINES

European Commission

E.U. EVOLUTION
Male Calves – 8D4W

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



Male Rearing Calves Beef type Price in	**Week 10**	**240.49**	**Male Rearing Calves Dairy type Price in**	**Week 10**	**83.22**

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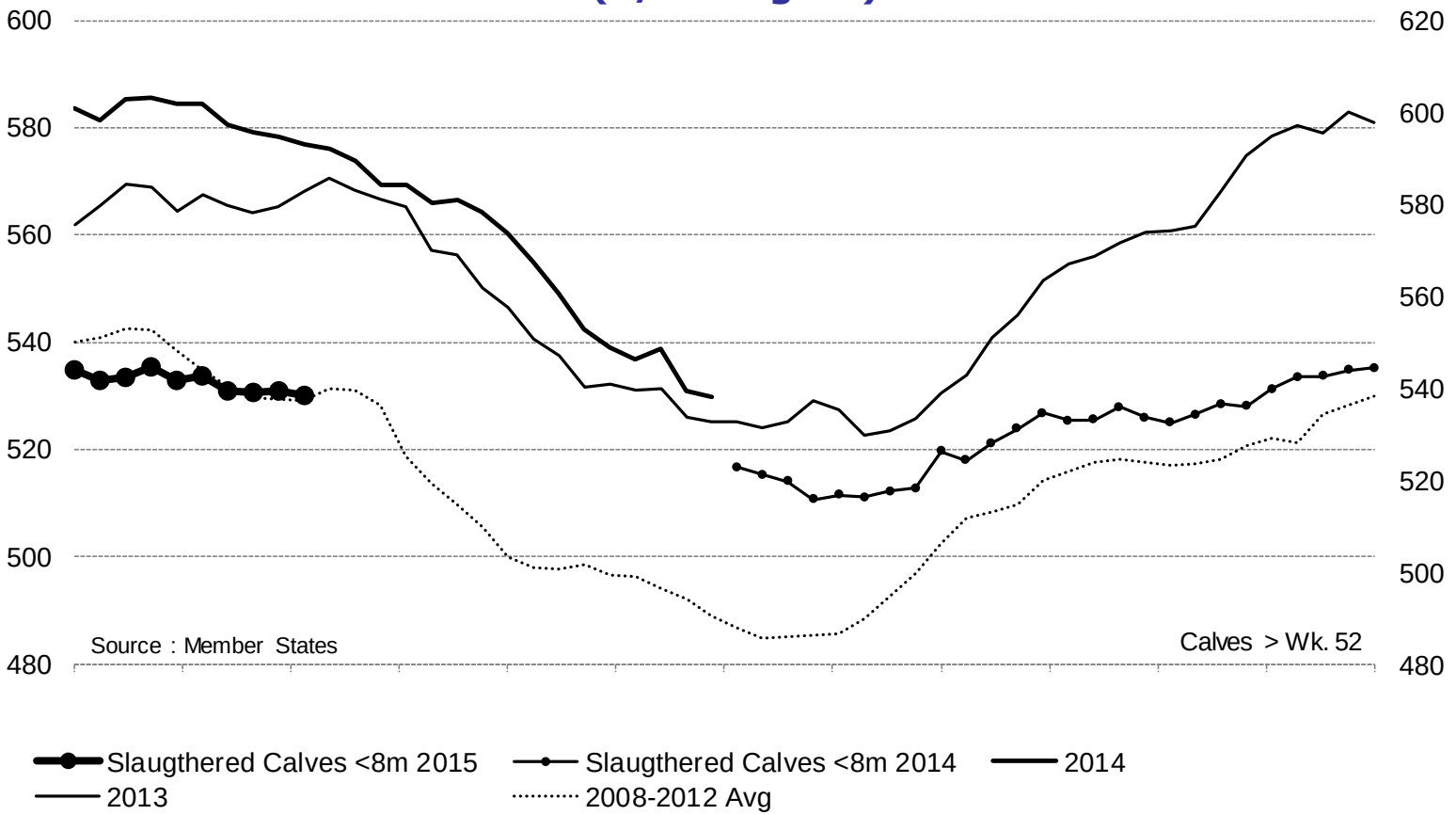
PRICES
LIVE BOVINES

E.U. EVOLUTION
Butcher Calves

European Commission

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



Price in Week 10 **538.45** € / 100 kg of carcasse weight

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Agriculture and Rural Development

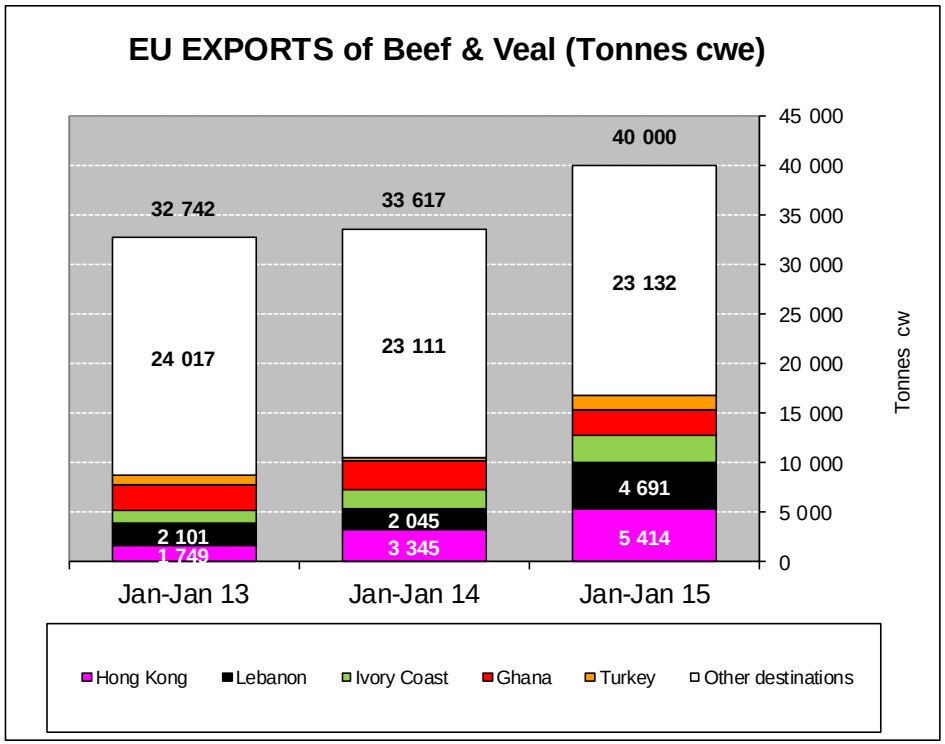
European Commission

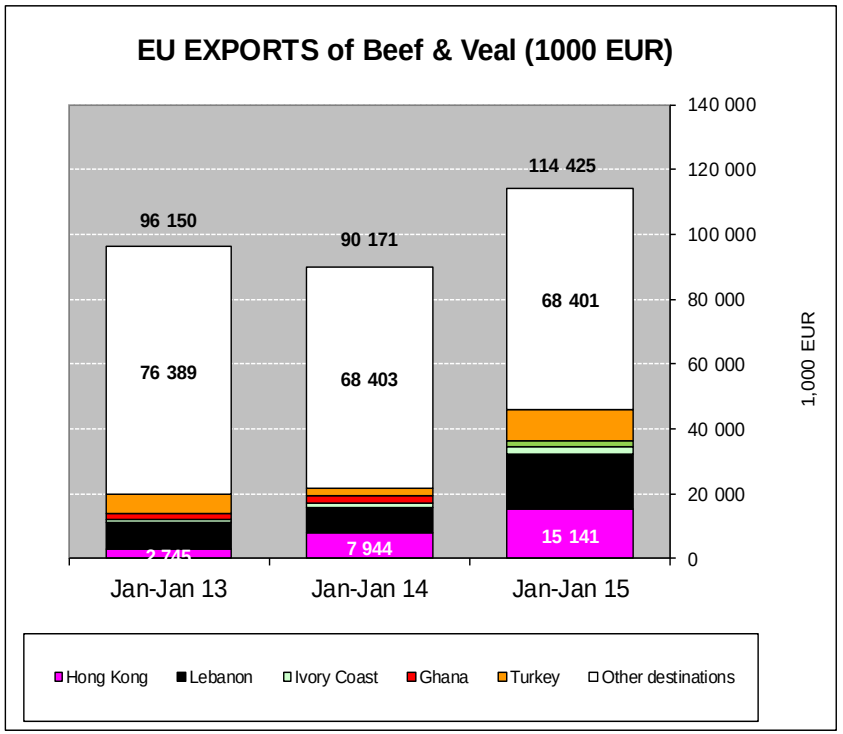
EU exports of beef and live animals (1):
Trade figures (COMEXT – tonnes cwe)

Destinations	2011		2012		2013		2014		Jan-Jan 15		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Jan 14
Hong Kong	19 449	3.1%	17 894	3.5%	28 540	6.3%	64 963	11.6%	5 414	13.5%	+ 61.8%
Lebanon	25 199	4.0%	27 473	5.4%	26 323	5.8%	37 977	6.8%	4 691	11.7%	+ 129.4%
Ivory Coast	18 177	2.9%	15 929	3.1%	21 619	4.8%	28 839	5.2%	2 646	6.6%	+ 40.4%
Ghana	21 979	3.5%	28 693	5.6%	40 878	9.0%	33 287	6.0%	2 558	6.4%	- 12.2%
Bosnia-Herz.	21 421	3.4%	19 714	3.9%	26 814	5.9%	34 135	6.1%	2 535	6.3%	+ 7.8%
Switzerland	26 718	4.3%	19 911	3.9%	26 526	5.8%	26 636	4.8%	1 946	4.9%	- 1.0%
Turkey	166 774	26.7%	101 475	20.0%	5 086	1.1%	8 118	1.5%	1 560	3.9%	+++
Norway	7 116	1.1%	14 620	2.9%	10 222	2.3%	7 899	1.4%	1 547	3.9%	+++
Algeria	17 971	2.9%	17 323	3.4%	25 930	5.7%	18 544	3.3%	1 367	3.4%	+ 107.8%
Philippines	2 902	0.5%	2 028	0.4%	2 730	0.6%	11 867	2.1%	1 090	2.7%	+++
Israel	8 719	1.4%	8 436	1.7%	9 378	2.1%	8 353	1.5%	972	2.4%	+ 37.1%
For.JRep.Mac	13 244	2.1%	11 446	2.3%	10 630	2.3%	11 373	2.0%	843	2.1%	+ 8.4%
Cuba	723	0.1%	1 098	0.2%	2 292	0.5%	4 455	0.8%	803	2.0%	+++
Angola	8 935	1.4%	8 258	1.6%	10 589	2.3%	14 587	2.6%	760	1.9%	- 13.5%
Kosovo	5 636	0.9%	4 068	0.8%	5 180	1.1%	7 936	1.4%	732	1.8%	+ 52.9%
China	3 808	0.6%	5 561	1.1%	7 531	1.7%	8 244	1.5%	667	1.7%	+ 0.1%
Other Destinations	255 340	40.9%	204 548	40.2%	193 436	42.6%	232 105	41.5%	9 870	24.7%	
EXTRA EU	624 111		508 473		453 705		559 321		40 000		
% change			- 19%		- 11%		+ 23%		+ 19.0%		

European Commission

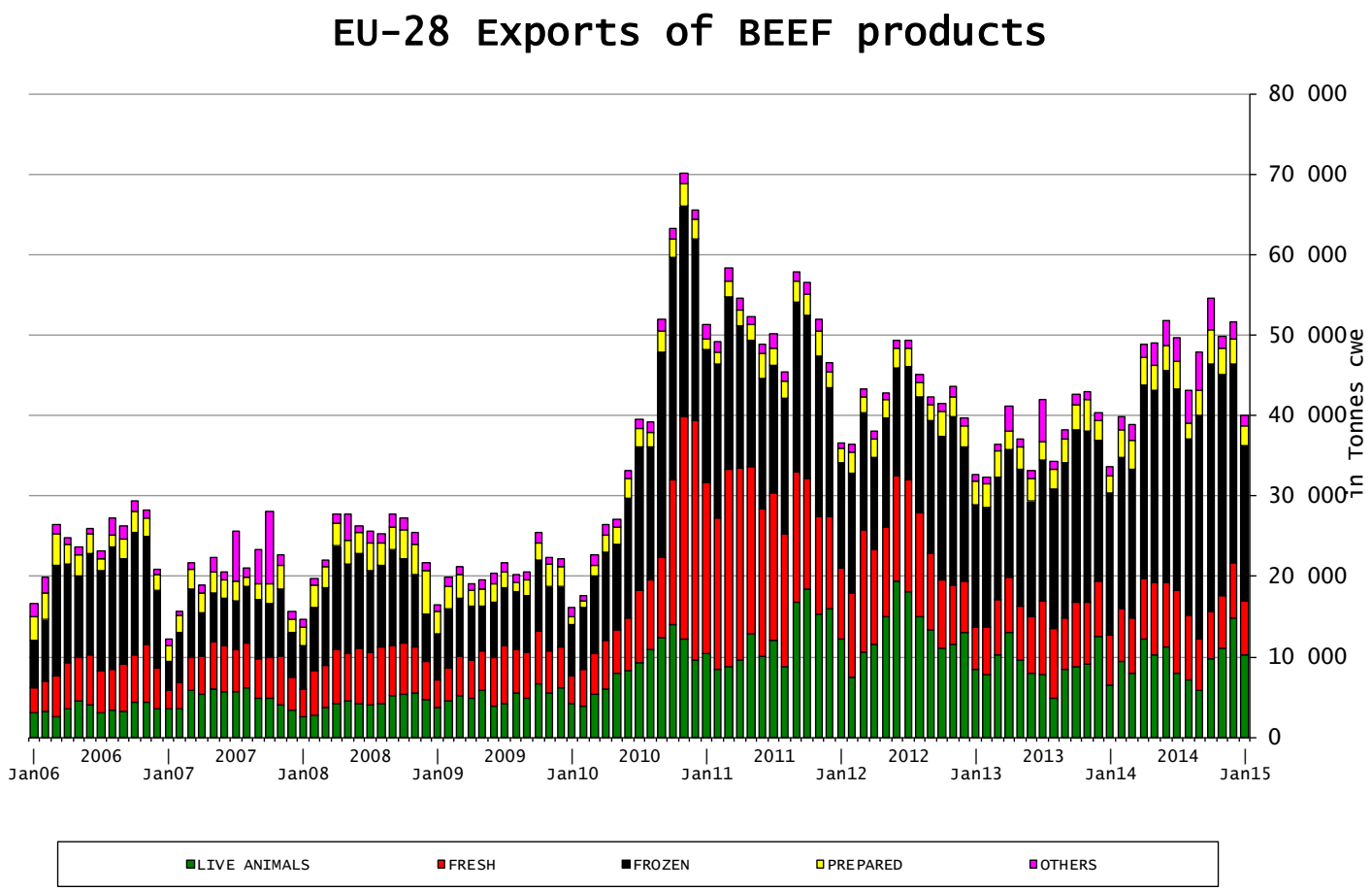
EU exports of beef and live animals:
Trade figures (COMEXT)





E.U. EXPORTS
Beef Products

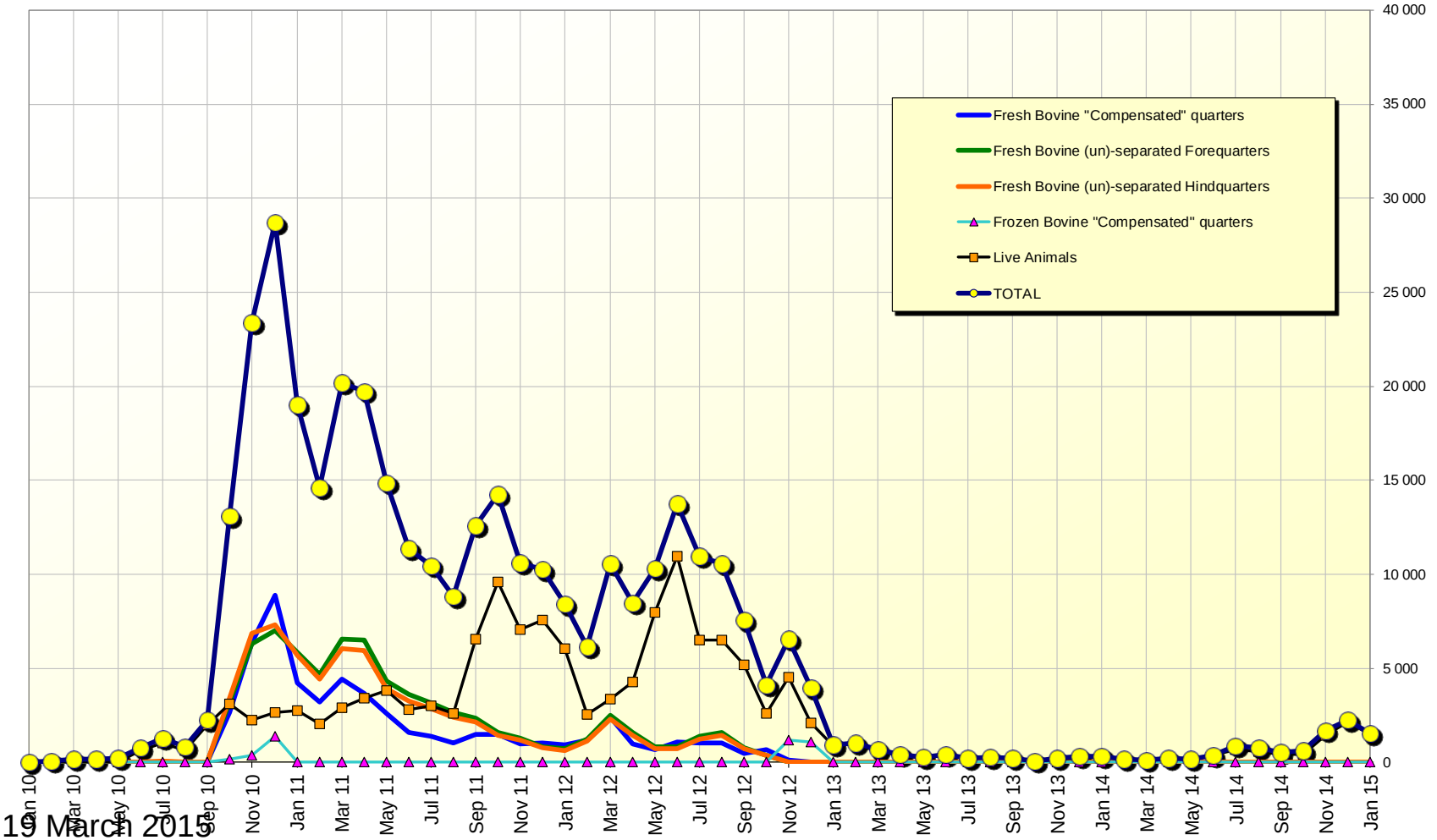
European Commission



19 March 2015

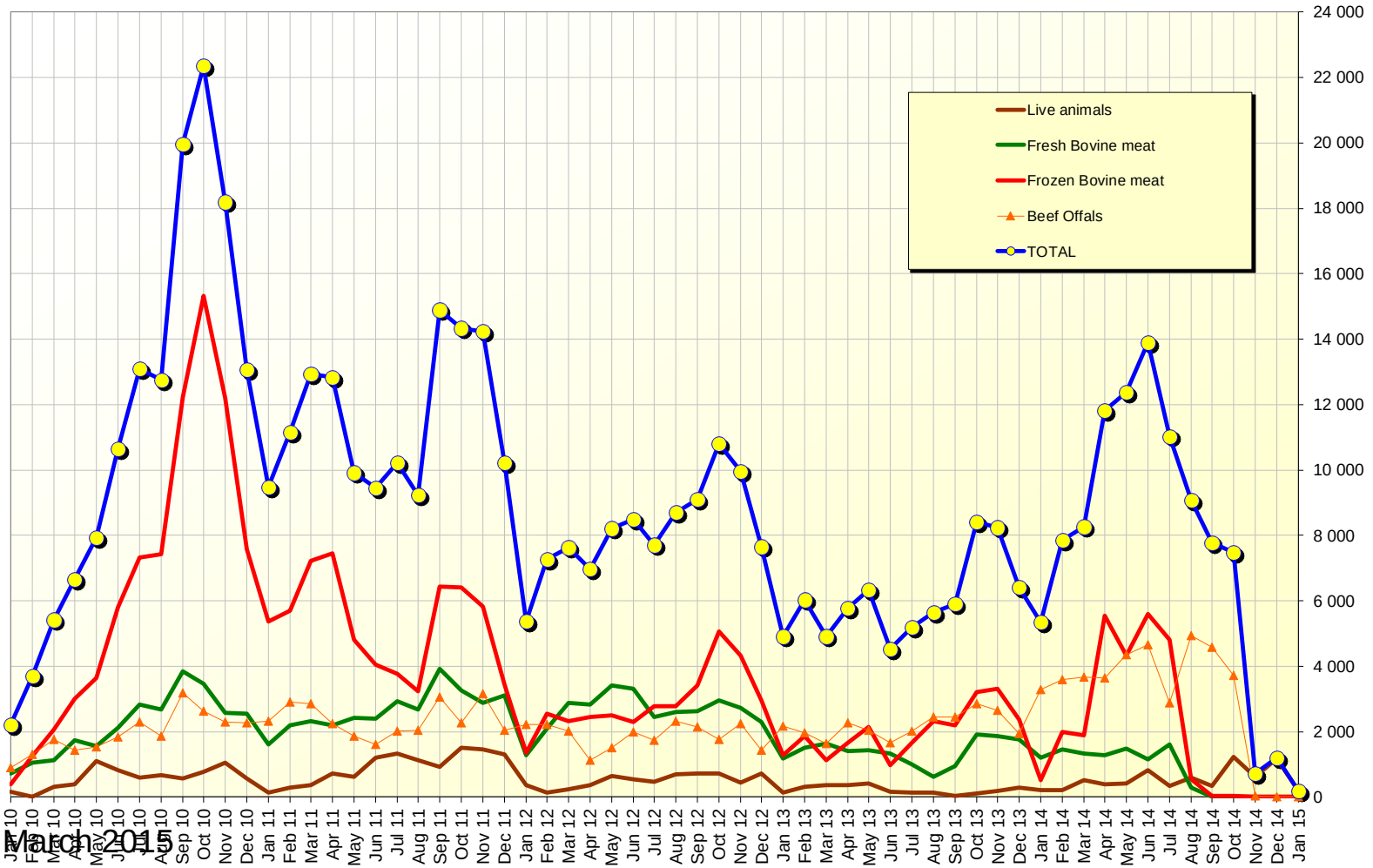
European Commission

EU beef Exports to TURKEY
Trade figures (COMEXT data) *tonnes cwe*



European Commission

EU beef Exports to RUSSIA
Trade figures (COMEXT data) *tonnes cwe*



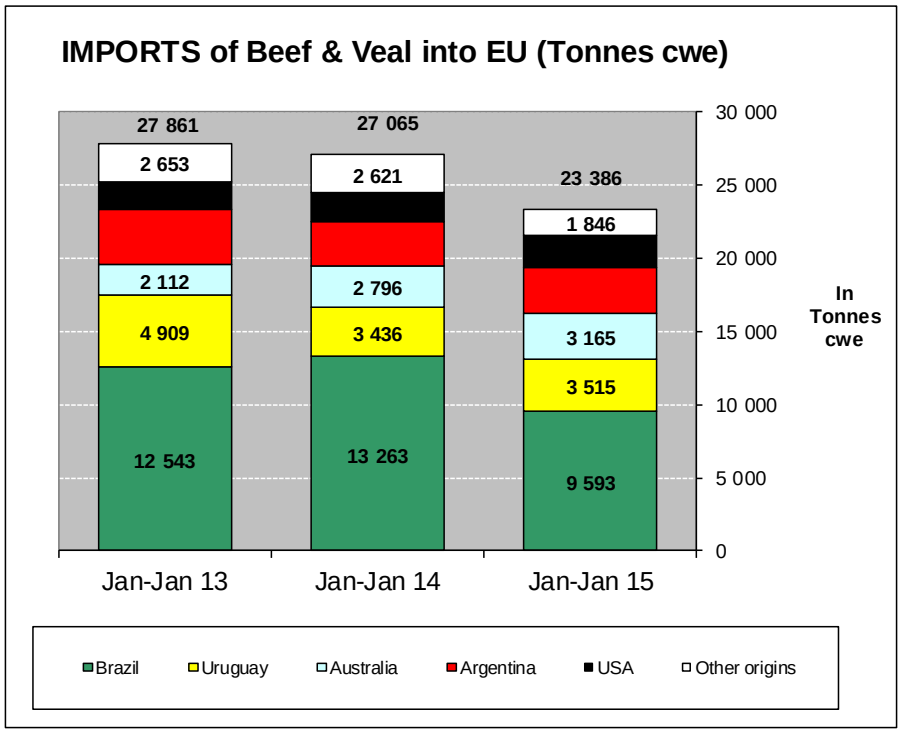
European Commission

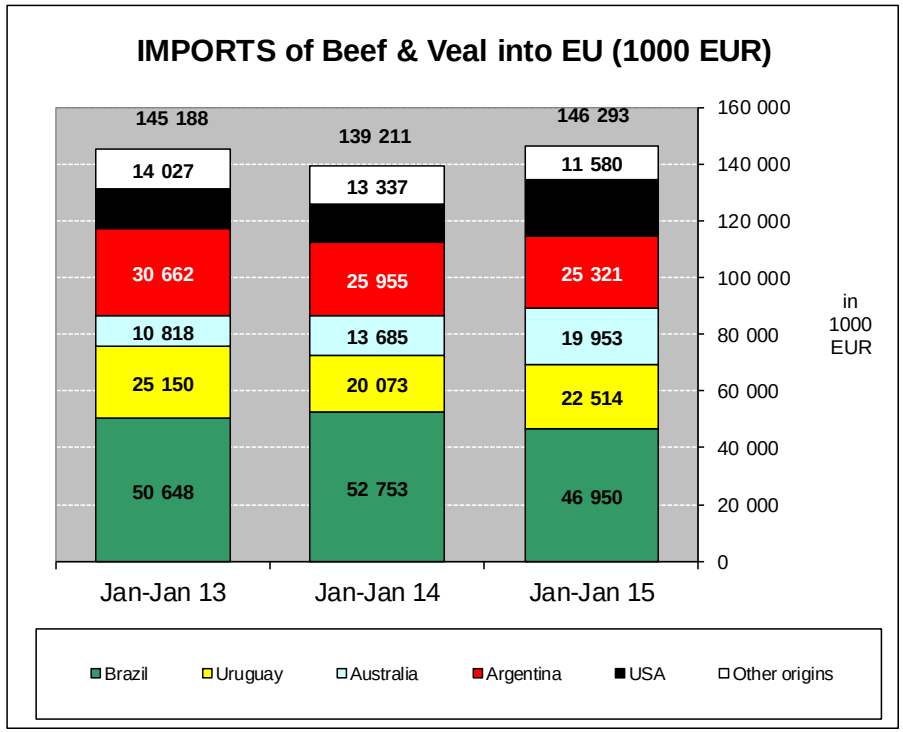
EU imports of beef and live animals (1):
Trade figures (COMEXT – tonnes cwe)

Origins	2011		2012		2013		2014		Jan-Jan 15		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Jan 14
Brazil	126 143	39.1%	126 926	41.3%	146 038	43.6%	143 976	43.4%	9 593	41.0%	- 27.7%
Uruguay	51 936	16.1%	52 580	17.1%	51 641	15.4%	48 719	14.7%	3 515	15.0%	+ 2.3%
Australia	18 277	5.7%	21 311	6.9%	28 106	8.4%	32 679	9.9%	3 165	13.5%	+ 13.2%
Argentina	62 704	19.4%	51 696	16.8%	47 977	14.3%	42 010	12.7%	3 143	13.4%	+ 2.8%
USA	23 000	7.1%	21 097	6.9%	22 300	6.7%	23 286	7.0%	2 124	9.1%	+ 12.2%
New Zealand	15 472	4.8%	15 376	5.0%	13 958	4.2%	14 382	4.3%	549	2.3%	- 54.4%
Switzerland	5 661	1.8%	4 949	1.6%	4 287	1.3%	5 456	1.6%	440	1.9%	- 13.7%
Botswana	980	0.3%	474	0.2%	6 280	1.9%	6 490	2.0%	352	1.5%	+ 49.6%
Namibia	9 004	2.8%	8 848	2.9%	11 113	3.3%	9 918	3.0%	351	1.5%	- 37.0%
Canada	917	0.3%	825	0.3%	965	0.3%	780	0.2%	53	0.2%	+ 4.9%
Serbia	793	0.2%	742	0.2%	619	0.2%	425	0.1%	34	0.1%	+ 4.8%
Norway	264	0.1%	151	0.0%	201	0.1%	347	0.1%	26	0.1%	+++
Chile	2 254	0.7%	1 711	0.6%	537	0.2%	875	0.3%	23	0.1%	+ 19.2%
Swaziland	51	0.0%	52	0.0%	66	0.0%	71	0.0%	10	0.0%	+++
Japan	0	0.0%	0	0.0%	3	0.0%	100	0.0%	7	0.0%	+++
Russia	100	0.0%	72	0.0%	150	0.0%	941	0.3%	0	0.0%	+ 0.0%
Mozambique									0	0.0%	+++
Other Origins	4 968	1.5%	578	0.2%	362	0.1%	1 123	0.3%	0	0.0%	
EXTRA EU	322 522		307 388		334 604		331 579		23 386		
% change			- 5%		+ 9%		- 1%		- 13.6%		

European Commission

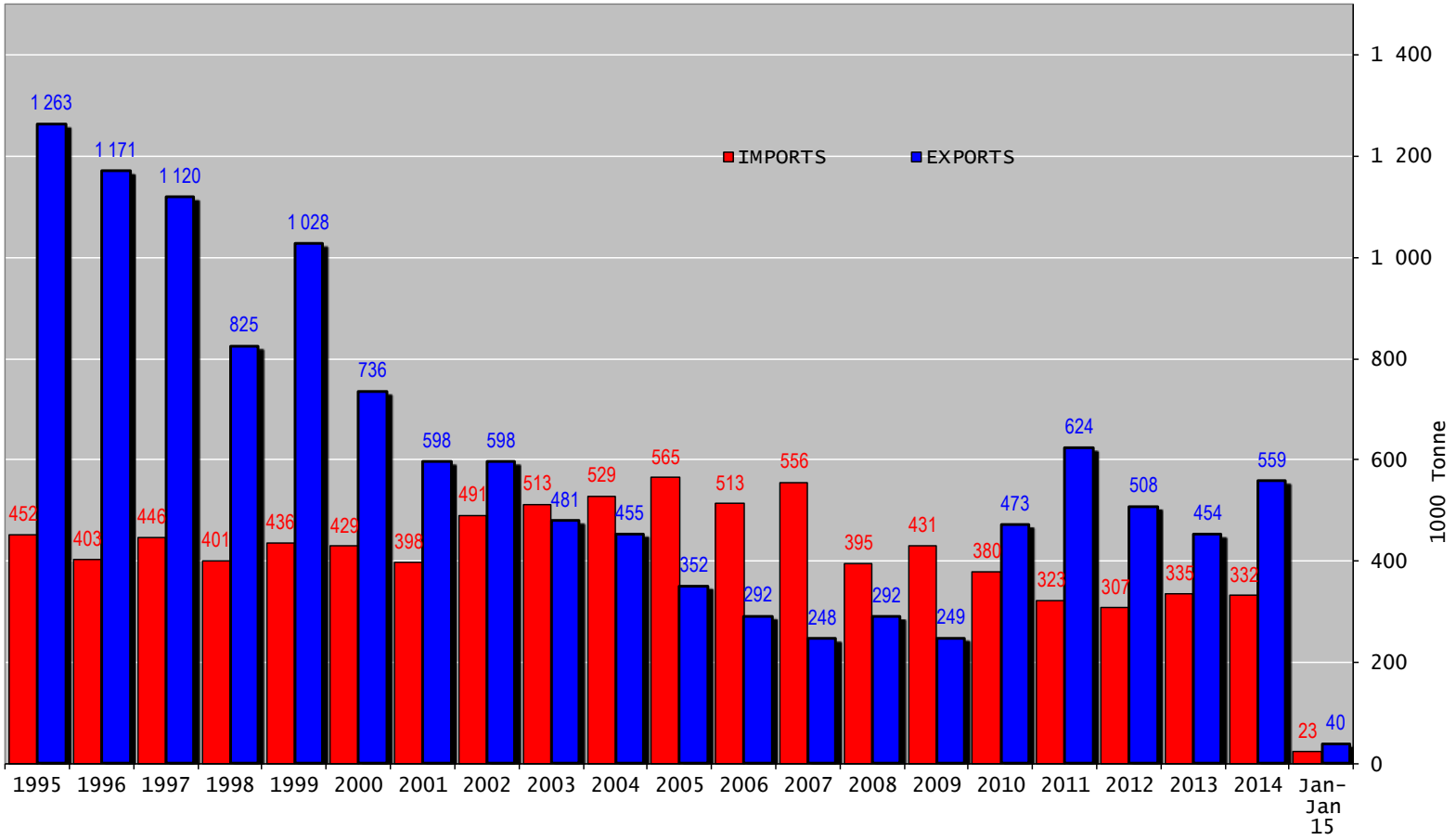
EU imports of beef and live animals (2): Trade figures (COMEXT)





European Commission

Trade balance of beef and live animals



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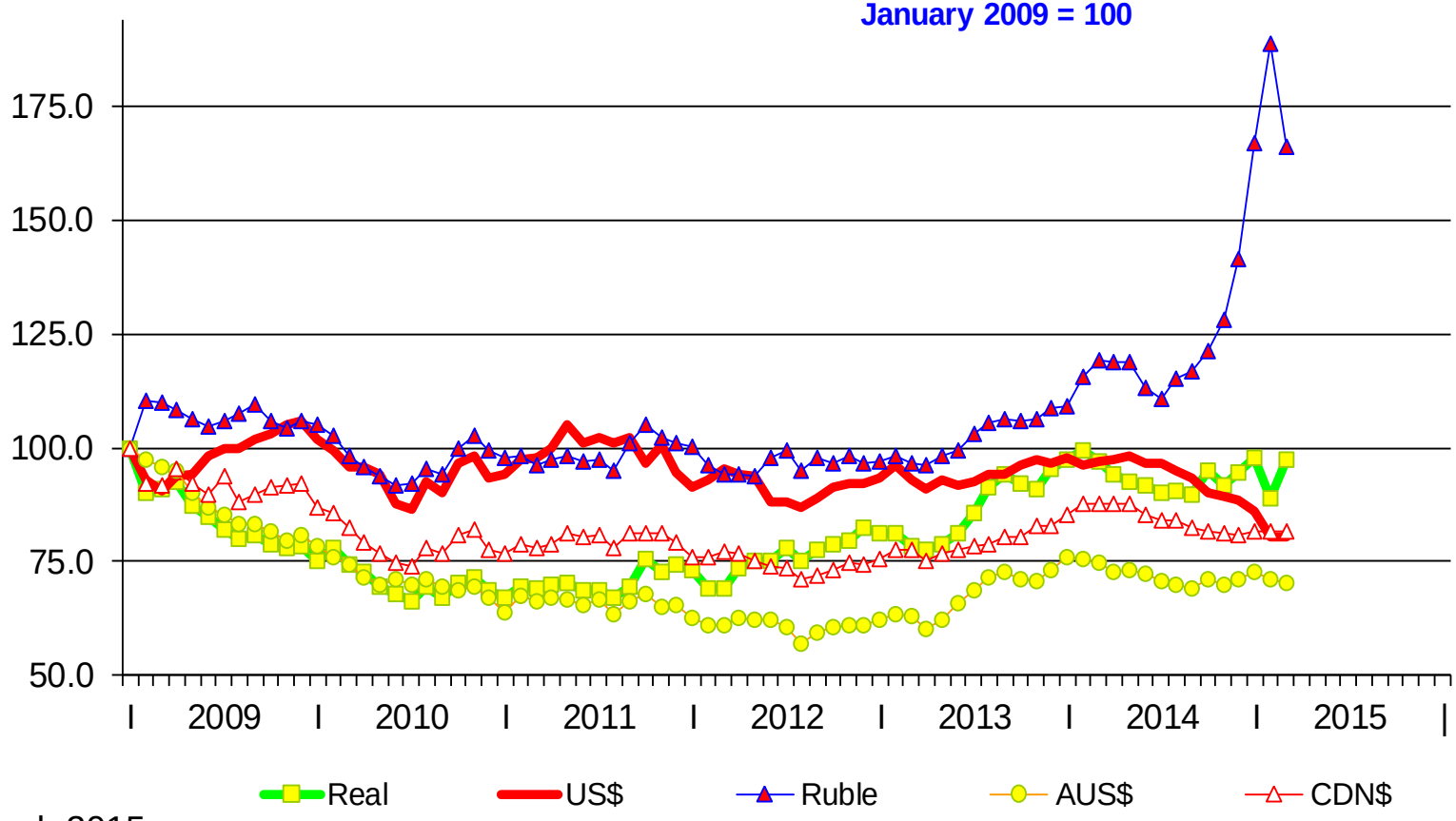
WORLD BEEF MARKET

EXCHANGE RATE INDEX / Euro
Main Trading Partners

European Commission

Index of monthly exchange rates of the main trading partners compared to the €uro

notification on the 1st of the month
January 2009 = 100



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Agriculture and Rural Development

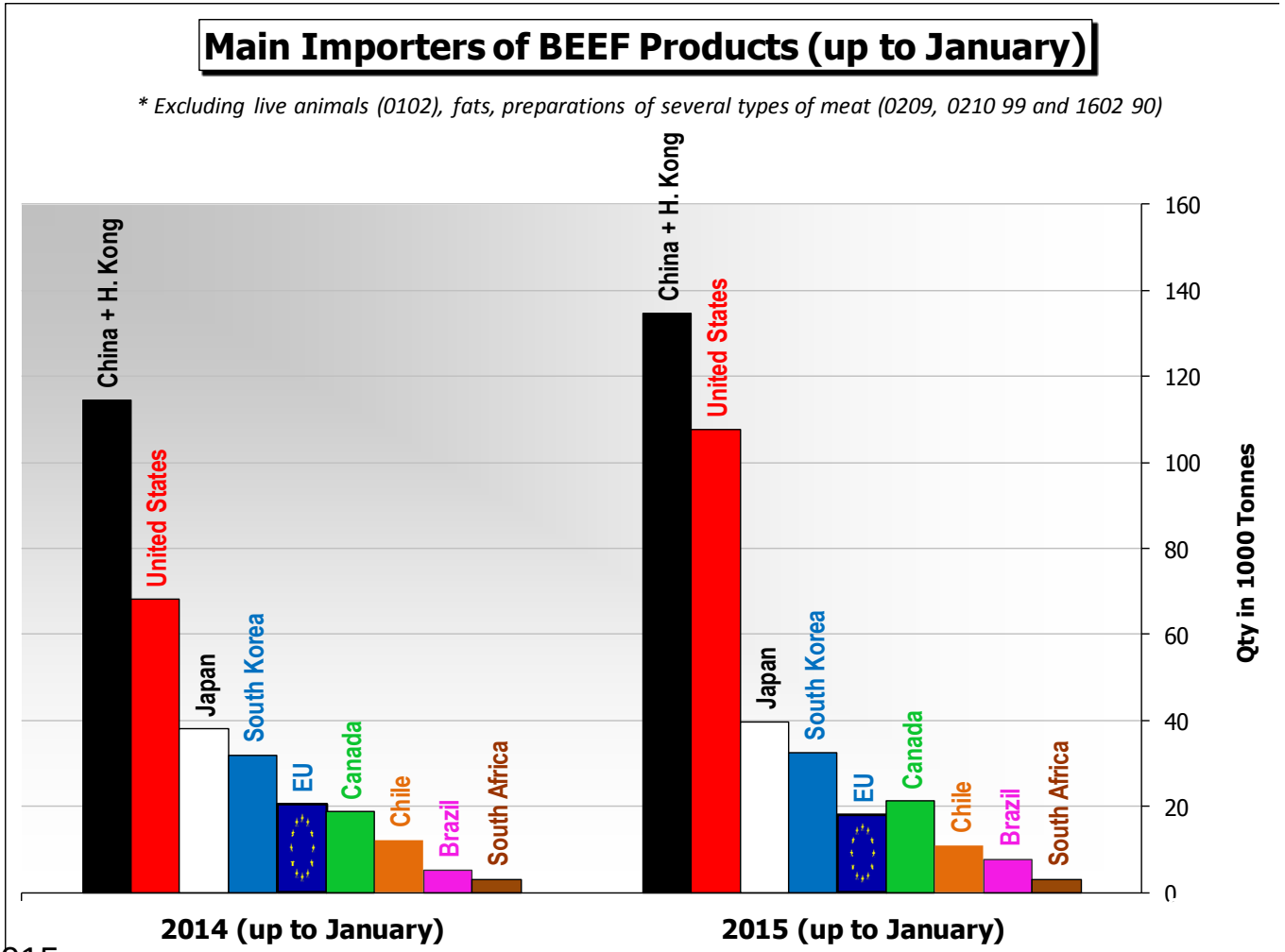
WORLD BEEF MARKET

E.U. IMPORTS BEEF MAIN IMPORTERS

European Commission

Source : GTA

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



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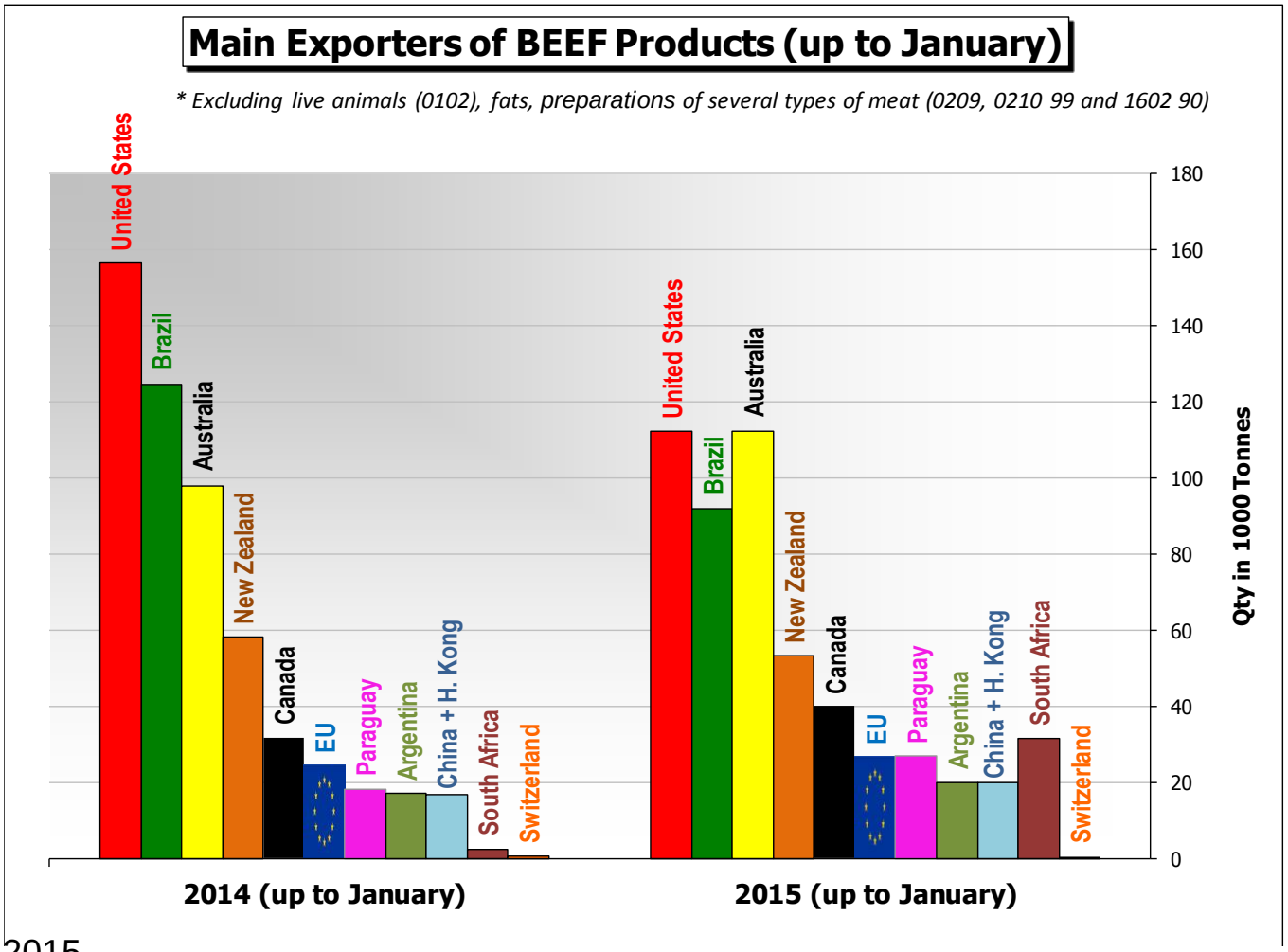
WORLD BEEF MARKET

E.U. EXPORTS BEEF MAIN EXPORTERS

European Commission

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



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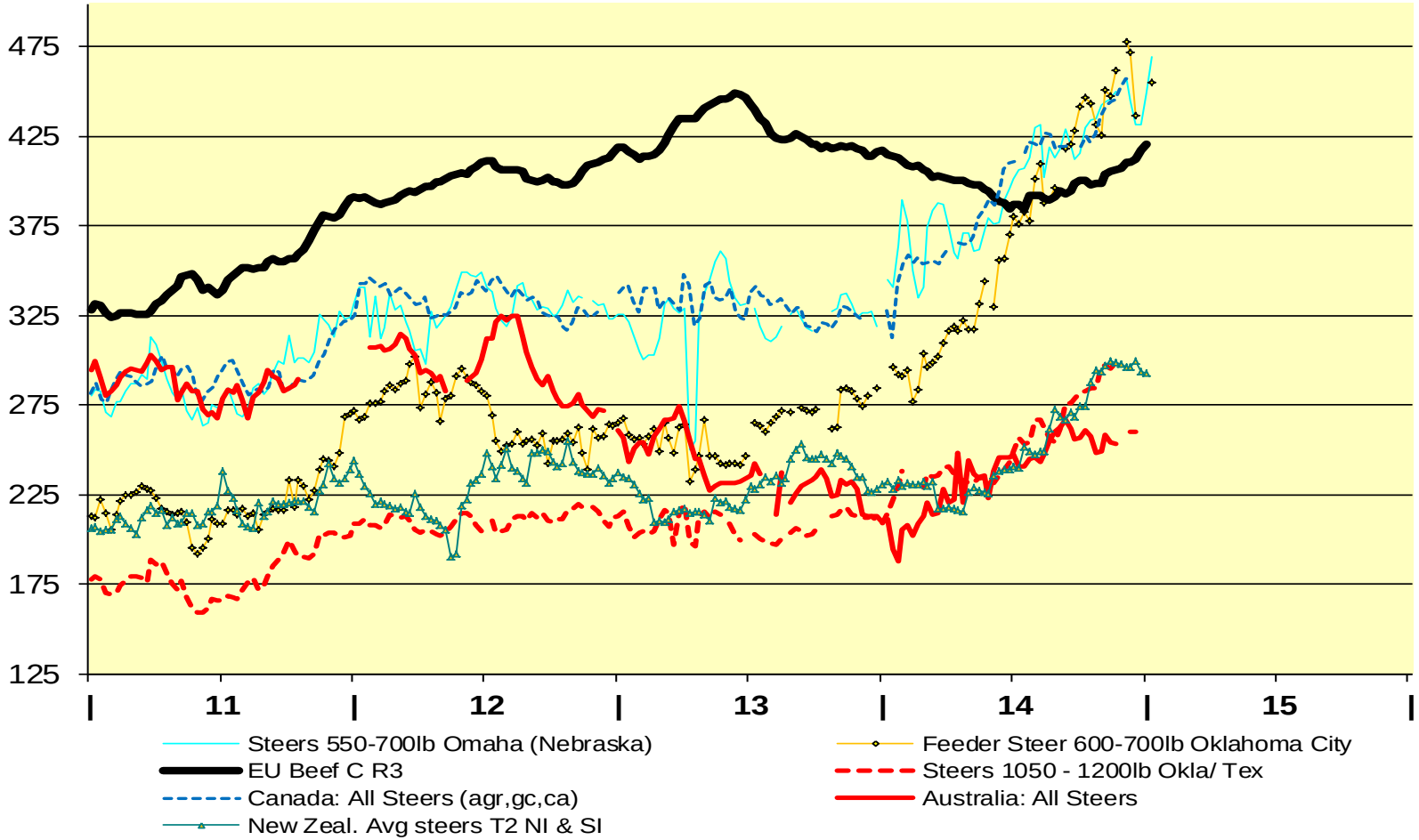
WORLD BEEF MARKET

STEER PRICES US & EU

European Commission

weekly US & EU Steer prices in €uro/100kg carcase



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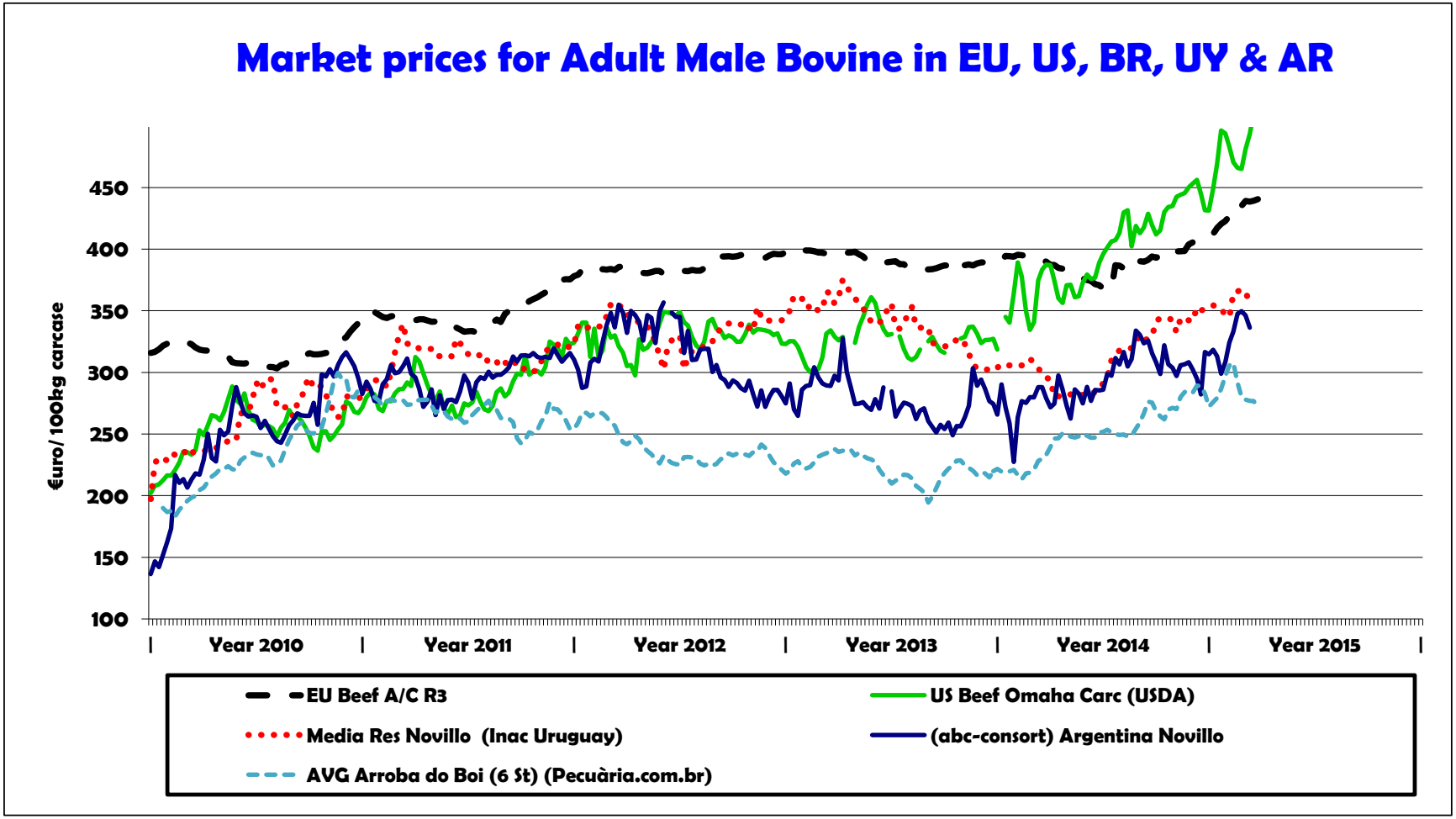
WORLD BEEF MARKET

ADULT MALE BOVINE PRICES

Brazil Argentina Uruguay EU

European Commission



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Agriculture and Rural Development

High Quality Beef Import Quota

European Commission

Hilton Quota **Regulation (EU) N° 593/2013**

		Quantity allocated (Tons)	2012/2013		2013/2014		2014/2015*	
			Use		Use		Use	
09.4001	Australia	2 250		*0.0%*		*0.0%*		*0.0%*
09.4004	Argentina	200	33.57	*16.8%*	15.71	*7.9%*	4.63	*2.3%*
09.4450	Argentina	30 000	24 336.10	*81.1%*	23 663.86	*78.9%*	15 865.79	*52.9%*
09.4451	Australia	7 150	6 441.07	*90.1%*	7 138.89	*99.8%*	4 913.88	*68.7%*
09.4452	Uruguay	6 300	6 289.20	*99.8%*	6 278.75	*99.7%*	4 129.18	*65.5%*
09.4453	Brazil	10 000	2 977.93	*29.8%*	4 078.92	*40.8%*	6 214.90	*62.1%*
09.4454	New Zealand	1 300	1 281.13	*98.5%*	1 299.61	*100.0%*	840.73	*64.7%*
09.4002	Canada/US	11 500	432.44	*3.8%*	431.80	*3.8%*	278.96	*2.4%*
09.4455	Paraguay	1 000		*0.0%*		*0.0%*		*0.0%*
Total Beef		67 250	41 757.87	*62.1%*	42 891.83	*63.8%*	32 243.44	*47.9%*
Total Buffalo		2 450	33.57	*1.4%*	15.71	*0.6%*	4.63	*0.2%*
Total		**69 700**	**41 791.44**	***60.0%***	**42 907.54**	***61.6%***	**32 248.07**	***46.3%***

*** up to 28/02/2015**

Agriculture and Rural Development

Import Quota

European Commission

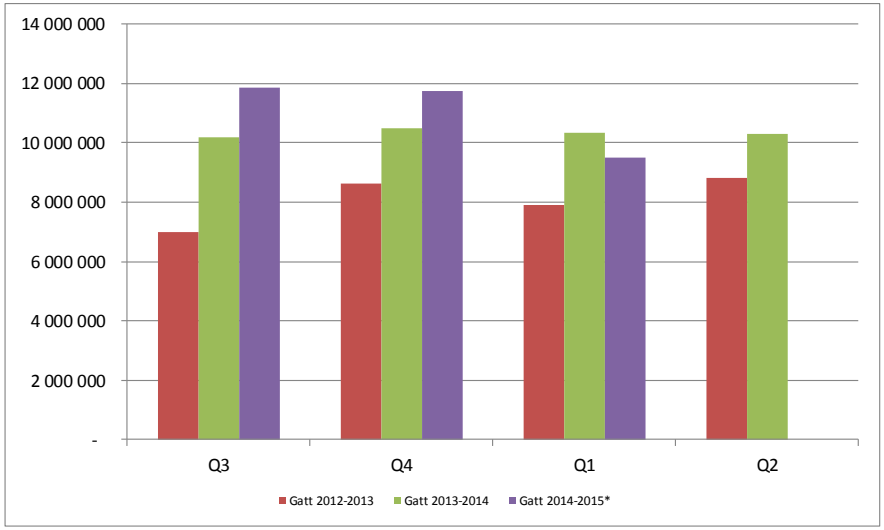
Quota ergaomnes **Regulation (EU) No 481/2012**

	2012-Q3	2012-Q4	2013-Q1	2013-Q2	TOTAL
Gatt 2012-2013	7 008 604	8 614 987	7 889 192	8 810 806	32 323 589
Available	9 825 000	12 050 000	12 050 000	12 050 000	45 975 000
Use	71.3%	71.5%	65.5%	73.1%	70.3%

	2013-Q3	2013-Q4	2014-Q1	2014-Q2	TOTAL
Gatt 2013-2014	10 190 908	10 493 437	10 349 842	10 304 157	41 338 344
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	84.6%	87.1%	85.9%	85.5%	85.8%

	2014-Q3	2014-Q4	2015-Q1	2015-Q2	TOTAL
Gatt 2014-2015*	11 840 303	11 747 695	9 480 542	-	33 068 540
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	98.3%	97.5%	78.7%	0.0%	68.6%

* Until 16/03/2015



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