



BEEF & VEAL MARKET SITUATION



CMO Committee
20 November 2014

Agriculture
and Rural
Development

LIVESTOCK

JUNE SURVEY



E.U. EVOLUTION TOTAL BOVINE

May/Jun 1000 Hd	TOT LIVESTOCK				%Var 2014 2013	BOVINE < 1 Year				%Var 2014 2013	BOVINE 1-2 Year				%Var 2014 2013	BOVINE > 2 Year				%Var 2014 2013
	2011	2012	2013	2014		2011	2012	2013	2014		2011	2012	2013	2014		2011	2012	2013	2014	
BE	2 560	2 484	2 433	2 521	+3.6%	759	701	689	734	+6.5%	495	498	495	506	+2.1%	1 306	1 284	1 248	1 282	+2.7%
BG																				
CZ																				
DK	1 645	1 629	1 603	1 585	-1.1%	550	544	523	528	+1.0%	328	322	328	318	-3.0%	766	763	752	739	-1.7%
DE	12 563	12 477	12 587	12 702	+0.9%	3 800	3 850	3 849	3 874	+0.7%	2 993	2 912	3 011	3 004	-0.2%	5 771	5 715	5 727	5 824	+1.7%
EE																				
IE	6 493	6 754	6 903	6 926	+0.3%	1 845	2 036	1 968	1 878	-4.6%	1 528	1 660	1 811	1 767	-2.4%	3 119	3 058	3 123	3 280	+5.0%
EL																				
ES	6 048	6 003	5 822	6 008	+3.2%	1 994	2 084	2 026	2 172	+7.2%	963	862	801	795	-0.8%	3 091	3 057	2 995	3 041	+1.5%
FR	19 714	19 282	19 179	19 286	+0.6%	5 701	5 602	5 497	5 530	+0.6%	3 502	3 452	3 529	3 476	-1.5%	10 512	10 227	10 153	10 280	+1.3%
IT	6 151	5 914	6 053	6 197	+2.4%	1 693	1 455	1 587	1 703	+7.3%	1 424	1 316	1 480	1 445	-2.3%	2 673	2 756	2 986	3 049	+2.1%
CY																				
LV																				
LT																				
LU																				
HU																				
MT																				
NL	3 868	3 879	4 000	4 067	+1.7%	1 551	1 569	1 616	1 642	+1.6%	623	614	624	634	+1.6%	1 695	1 696	1 759	1 791	+1.8%
AT	1 982	1 957	1 939	1 937	-0.1%	614	614	604	613	+1.4%	437	428	435	424	-2.6%	931	915	900	901	+0.1%
PL	5 762	5 777	5 860	5 920	+1.0%	1 481	1 469	1 586	1 609	+1.4%	1 300	1 344	1 422	1 433	+0.8%	2 981	2 964	2 852	2 879	+1.0%
PT																				
RO	2 113		2 054	2 069	+0.7%	509	467	478	479	+0.3%	249	242	236	236	+0.1%	1 332	1 332	1 340	1 354	+1.0%
SI																				
SK																				
FI																				
SE	1 512	1 500	1 506	1 493	-0.8%	475	481	468	472	+0.9%	378	368	381	370	-2.8%	659	651	657	651	-1.0%
UK	9 933	9 900	9 843	9 829	-0.1%	2 847	2 905	2 808	2 798	-0.4%	2 420	2 419	2 474	2 393	-3.3%	4 667	4 576	4 561	4 638	+1.7%
EU	80 343	77 557	79 781	80 541	+1.0%	23 819	23 777	23 698	24 031	+1.4%	16 639	16 439	17 027	16 801	-1.3%	39 503	38 996	39 055	39 708	+1.7%

Source : EStat Newcronos

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

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LIVESTOCK

JUNE SURVEY



E.U. EVOLUTION TOTAL BOVINE

May/Jun 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	1 029	1 035	1 007	971	-3.5%	507	509	510	522	+2.5%	521	525	498	449	-9.7%
BG															
CZ															
DK	686	688	678	664	-2.1%	575	582	576	563	-2.3%	110	106	102	101	-1.0%
DE	4 884	4 865	4 896	4 981	+1.7%	4 185	4 191	4 223	4 311	+2.1%	699	673	673	670	-0.4%
EE															
IE	2 240	2 289	2 313	2 355	+1.8%	1 139	1 141	1 163	1 226	+5.4%	1 102	1 149	1 150	1 129	-1.8%
EL															
ES	2 734	2 638	2 595	2 716	+4.7%	851	836	823	876	+6.5%	1 882	1 803	1 772	1 840	+3.8%
FR	7 860	7 706	7 682	7 759	+1.0%	3 589	3 536	3 545	3 615	+2.0%	4 272	4 170	4 137	4 144	+0.2%
IT	2 106	2 168	2 381	2 382	+0.1%	1 718	1 800	1 989	2 053	+3.2%	388	367	392	329	-15.9%
CY															
LV															
LT															
LU															
HU															
MT															
NL	1 568	1 583	1 637	1 655	+1.1%	1 463	1 484	1 553	1 572	+1.2%	105	99	84	82	-2.4%
AT	792	782	769	770	+0.2%	532	529	524	534	+2.0%	260	253	245	236	-3.7%
PL	2 626	2 578	2 531	2 479	-2.0%	2 473	2 441	2 361	2 310	-2.1%	153	137	170	169	-0.7%
PT															
RO	1 195	1 205	1 222	1 224	+0.2%	1 181	1 188	1 208	1 207	-0.1%	14	18	13	17	+27.3%
SI															
SK															
FI															
SE	542	540	539	531	-1.6%	347	348	346	344	-0.6%	197	193	193	186	-3.5%
UK	3 489	3 469	3 393	3 406	+0.4%	1 814	1 812	1 782	1 828	+2.6%	1 675	1 657	1 611	1 578	-2.0%
EU	31 752	31 546	31 642	31 894	+0.8%	20 374	20 397	20 603	20 963	+1.7%	11 378	11 149	11 040	10 931	-1.0%

Source : EStat Newcronos

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

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LIVESTOCK

DECEMBER SURVEY



E.U. EVOLUTION TOTAL BOVINE

Dec	TOTAL LIVESTOCK				%Var 2013 2012	BOVINE < 1 Year				%Var 2013 2012	BOVINE 1-2 Year				%Var 2013 2012	BOVINE > 2 Year				%Var 2013 2012
1000 Hd	2010	2011	2012	2013		2010	2011	2012	2013		2010	2011	2012	2013		2010	2011	2012	2013	
BE	2 510	2 472	2 438	2 441	+0.1%	686	678	733	718	-2.1%	502	494	484	490	+1.3%	1 321	1 299	1 222	1 234	+1.0%
BG	554	568	535	586	+9.4%	141	142	121	150	+23.6%	53	59	64	62	-3.9%	359	367	350	374	+6.9%
CZ	1 319	1 339	1 321	1 332	+0.8%	388	392	395	390	-1.2%	303	299	298	300	+0.6%	629	648	628	642	+2.2%
DK	1 630	1 612	1 607	1 583	-1.5%	553	548	545	528	-3.1%	317	306	314	319	+1.6%	760	758	748	736	-1.6%
DE	12 706	12 528	12 507	12 686	+1.4%	3 868	3 851	3 868	3 878	+0.3%	3 016	2 931	2 940	3 015	+2.5%	5 823	5 746	5 699	5 793	+1.7%
EE	236	238	246	261	+6.3%	63	63	66	71	+7.9%	48	47	50	54	+8.3%	126	128	131	137	+4.7%
IE	5 918	5 925	6 253	6 309	+0.9%	1 695	1 868	1 987	1 893	-4.7%	1 520	1 442	1 617	1 714	+6.0%	2 703	2 615	2 650	2 701	+2.0%
EL	679	681	685	653	-4.7%	182	191	202	167	-17.3%	136	125	131	129	-1.5%	361	365	351	357	+1.7%
ES	6 075	5 923	5 813	5 697	-2.0%	2 121	2 078	2 122	2 057	-3.1%	696	775	714	732	+2.5%	3 258	3 070	2 977	2 908	-2.3%
FR	19 599	19 129	19 052	19 129	+0.4%	5 589	5 525	5 541	5 453	-1.6%	3 378	3 311	3 378	3 441	+1.9%	10 631	10 292	10 133	10 235	+1.0%
HR	444	447	452	442	-2.2%	130	146	143	145	+1.4%	84	90	101	92	-8.9%	230	210	208	205	-1.4%
IT	5 832	6 252		6 249		1 736	1 783	1 598	1 680	+5.1%	1 392	1 394	1 421	1 457	+2.5%	2 704	2 721	3 072	3 112	+1.3%
CY	55	57	57	57	+0.3%	20	21	21	21	+2.0%	10	10	10	9	-8.4%	25	26	26	27	+2.2%
LV	379	381	393	406	+3.4%	106	104	108	109	+0.8%	68	67	70	75	+7.6%	206	210	215	222	+3.4%
LT	748	752	729	714	-2.2%	180	201	193	187	-3.5%	148	144	145	144	-0.9%	420	408	391	383	-2.0%
LU	194	188	188	198	+5.3%	52	52	52	55	+6.2%	44	43	43	45	+5.2%	98	93	93	98	+4.8%
HU	682	697	760	772	+1.6%	170	188	213	209	-1.9%	154	137	159	176	+10.7%	357	372	389	387	-0.5%
MT	15	15	16	15	-2.4%	4	4	5	4	-11.2%	3	3	4	4	+2.5%	7	7	7	7	+1.1%
NL	3 960	3 912	3 985	4 090	+2.6%	1 577	1 581	1 623	1 653	+1.8%	616	591	603	627	+4.0%	1 766	1 740	1 760	1 810	+2.8%
AT	2 013	1 977	1 956	1 958	+0.1%	634	623	629	627	-0.3%	444	430	424	435	+2.5%	936	923	903	897	-0.7%
PL	5 562	5 501	5 520	5 590	+1.3%	1 387	1 362	1 388	1 409	+1.5%	1 227	1 256	1 324	1 372	+3.6%	2 948	2 883	2 809	2 809	+0.0%
PT	1 503	1 519	1 498	1 471	-1.8%	437	462	451	425	-5.7%	204	210	206	211	+2.5%	862	847	840	834	-0.8%
RO	2 001	1 989	2 009	2 022	+0.7%	420	452	458	454	-0.8%	215	220	235	238	+1.0%	1 341	1 317	1 316	1 331	+1.1%
SI	470	462	460	461	+0.1%	147	146	147	144	-1.8%	122	119	120	123	+2.5%	201	197	193	194	+0.1%
SK	467	463	471	468	-0.7%	132	133	136	133	-2.4%	94	91	95	98	+2.5%	241	239	240	238	-1.0%
FI	909	903	901	903	+0.2%	303	304	301	302	+0.4%	226	222	225	224	-0.6%	380	377	376	378	+0.6%
SE	1 475	1 450	1 444	1 444	-0.0%	480	480	475	469	-1.3%	344	330	338	342	+1.2%	651	640	630	632	+0.3%
UK	9 896	9 675	9 749	9 682	-0.7%	2 861	2 857	2 921	2 803	-4.0%	2 383	2 344	2 395	2 411	+0.7%	4 652	4 474	4 433	4 468	+0.8%
EU	87 831	87 054	81 045	87 619	+0.4%	26 061	26 235	26 441	26 134	-1.2%	17 746	17 491	17 907	18 336	+2.4%	43 996	42 973	42 789	43 149	+0.8%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2012 AND 2013

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LIVESTOCK

DECEMBER SURVEY



E.U. EVOLUTION COWS

Dec	TOTAL COWS				%Var 2013 2012	DAIRY COWS				%Var 2013 2012	OTHER COWS				%Var 2013 2012
1000 Hd	2010	2011	2012	2013		2010	2011	2012	2013		2010	2011	2012	2013	
BE	1 013	999	945	945	+0.0%	518	511	504	516	+2.5%	495	489	441	429	-2.7%
BG	332	336	323	353	+9.2%	314	313	294	313	+6.4%	19	23	29	40	+38.9%
CZ	542	557	543	553	+1.9%	375	374	367	375	+2.3%	167	183	175	178	+1.2%
DK	679	681	678	664	-2.1%	573	579	579	567	-2.1%	106	102	100	97	-3.0%
DE	4 889	4 874	4 863	4 941	+1.6%	4 182	4 190	4 190	4 268	+1.8%	707	684	672	673	+0.1%
EE	109	111	112	118	+4.9%	97	96	97	98	+1.1%	12	15	15	20	+28.6%
IE	2 098	2 119	2 188	2 168	-0.9%	1 007	1 036	1 060	1 082	+2.1%	1 091	1 083	1 128	1 085	-3.8%
EL	308	290	278	289	+4.0%	144	130	132	130	-1.5%	164	160	146	159	+8.9%
ES	2 765	2 619	2 608	2 628	+0.8%	845	798	827	857	+3.6%	1 920	1 821	1 780	1 771	-0.5%
FR	7 938	7 812	7 757	7 803	+0.6%	3 718	3 664	3 644	3 697	+1.5%	4 220	4 148	4 114	4 106	-0.2%
HR	218	196	195	181	-7.2%	207	185	181	168	-7.2%	12	11	14	13	-7.1%
IT	2 118	2 145	2 391	2 410	+0.8%	1 746	1 755	2 009	2 075	+3.3%	372	390	382	335	-12.3%
CY	23	24	24	25	+1.4%	23	24	24	25	+1.4%	0	0	0	0	+20.0%
LV	183	186	190	194	+2.1%	164	164	165	165	+0.3%	19	22	26	29	+14.1%
LT	377	368	352	345	-2.0%	360	350	331	316	-4.6%	18	18	21	29	+38.9%
LU	78	75	74	78	+5.2%	46	44	45	48	+7.3%	32	30	29	30	+2.1%
HU	309	329	339	340	+0.3%	239	252	255	244	-4.3%	70	77	83	96	+15.7%
MT	6	6	6	6	+0.2%	6	6	6	6	+0.2%	0	0	0	1	+840.0%
NL	1 637	1 611	1 643	1 683	+2.4%	1 518	1 504	1 541	1 597	+3.6%	118	107	102	86	-15.7%
AT	794	784	772	766	-0.7%	533	527	523	530	+1.2%	261	257	248	237	-4.7%
PL	2 636	2 568	2 469	2 442	-1.1%	2 529	2 446	2 346	2 299	-2.0%	107	122	123	143	+16.6%
PT	686	683	678	677	-0.1%	243	242	237	231	-2.4%	442	441	442	446	+1.1%
RO	1 199	1 189	1 180	1 187	+0.6%	1 179	1 170	1 163	1 169	+0.5%	20	19	17	18	+4.7%
SI	173	171	168	166	-1.0%	109	109	111	110	-1.3%	64	62	57	56	-0.5%
SK	204	201	203	199	-1.7%	159	154	150	145	-3.3%	45	47	53	54	+2.6%
FI	340	337	336	338	+0.5%	284	282	280	282	+0.8%	55	56	56	56	-0.6%
SE	534	530	524	522	-0.4%	349	348	346	346	+0.2%	185	182	178	175	-1.6%
UK	3 507	3 442	3 388	3 371	-0.5%	1 847	1 800	1 786	1 817	+1.7%	1 660	1 642	1 603	1 554	-3.1%
EU	35 694	35 243	35 225	35 390	+0.5%	23 314	23 053	23 193	23 475	+1.2%	12 380	12 190	12 034	11 916	-1.0%

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Source : EStat Newcronos

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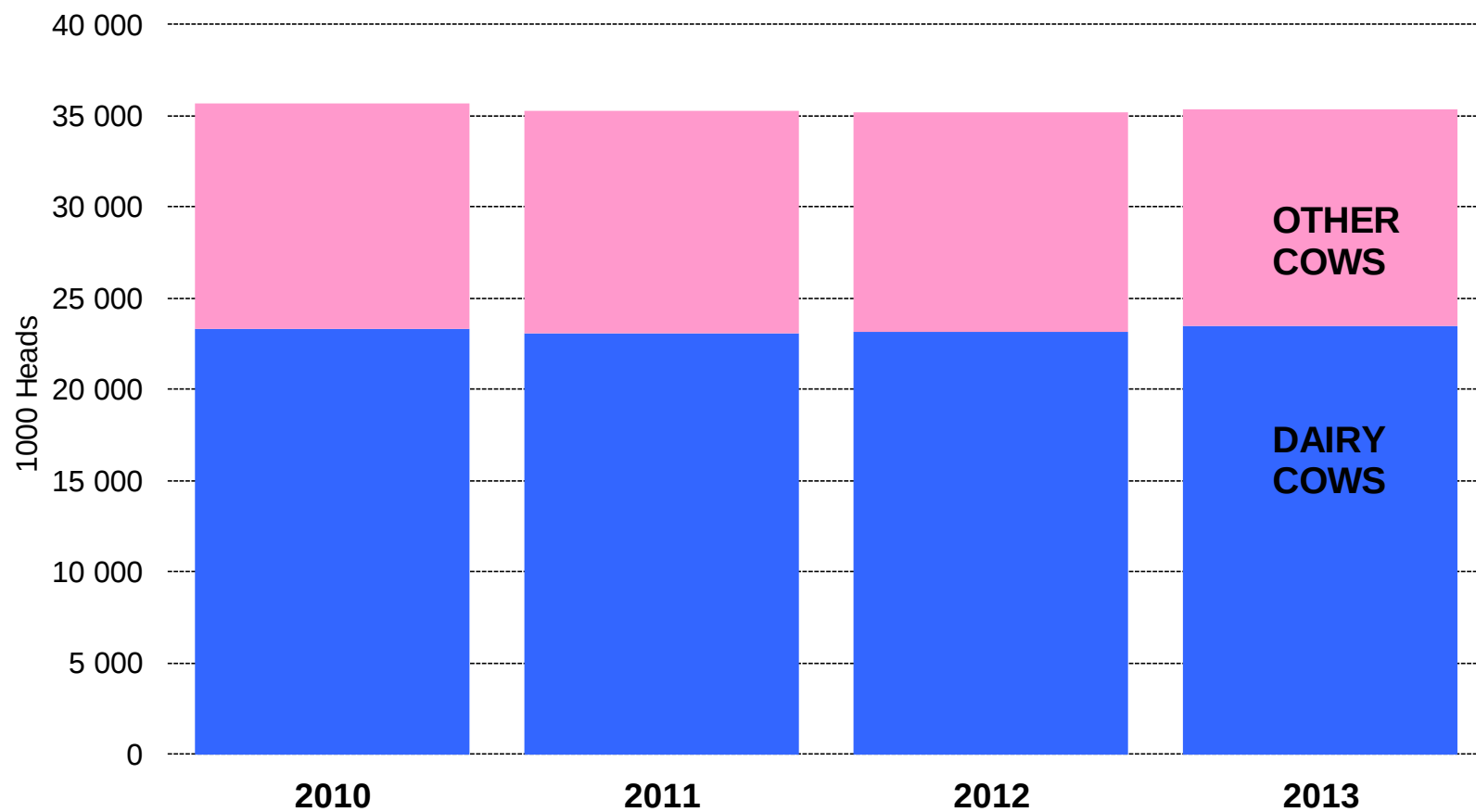
EU %Var is calculated considering only countries available in 2012 AND 2013

LIVESTOCK

May / June SURVEY



E.U. EVOLUTION TOTAL COWS



Source : EStat Newcronos

(December survey)

20 November 2014

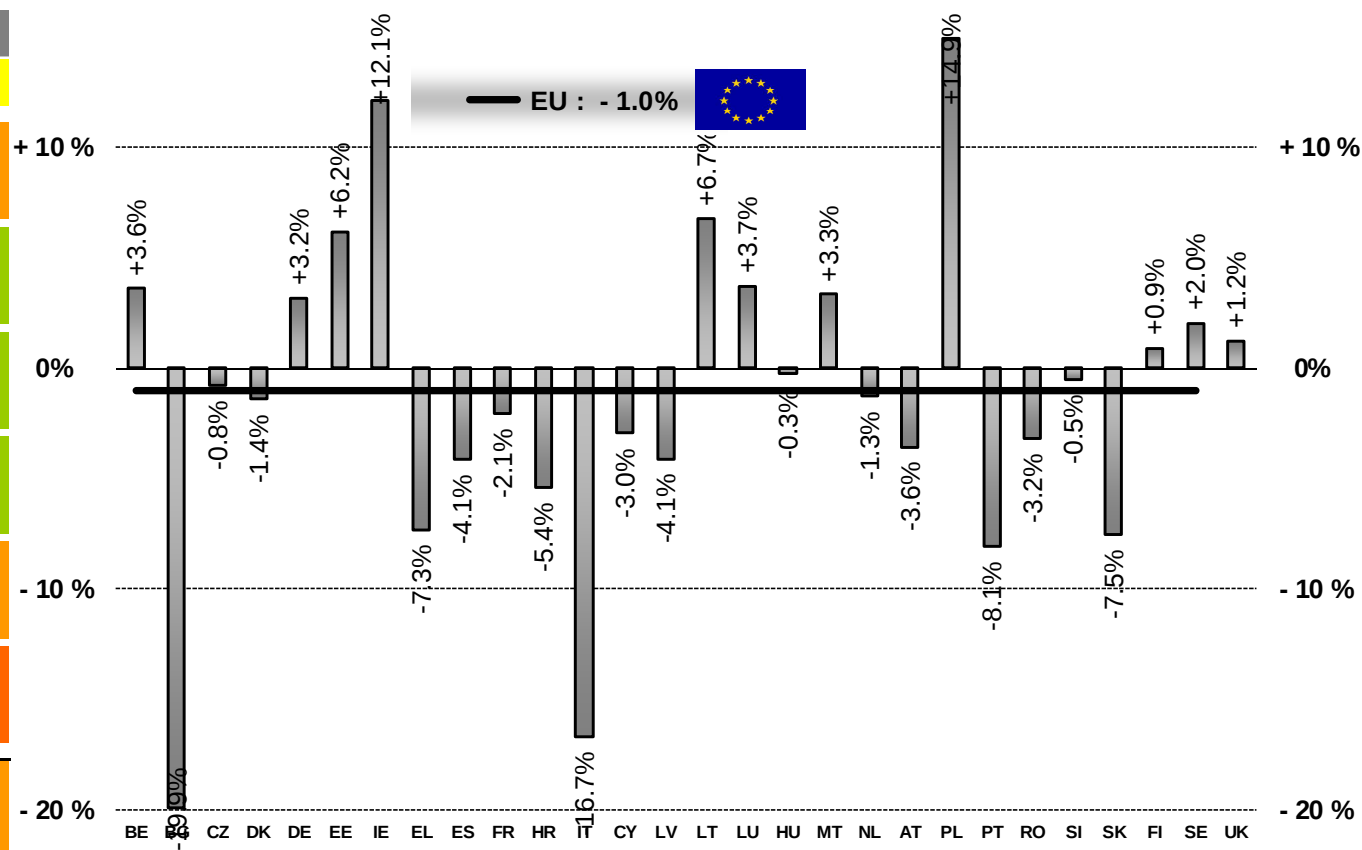
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PRODUCTION

% EVOLUTION HEADS



HEADS	Jan-Aug 13/14	
	EU15	EU28
Bull	-4.6%	-1.8%
Bullock	+7.8%	+7.8%
Cow	-0.4%	+0.4%
Heifer	-0.0%	+0.8%
Calve	-2.3%	-3.0%
Young cattle	-9.7%	-9.9%
Meat of bovine animals	-1.9%	-1.0%



Estimates for last month of period :

Source : EStat - Newcronos

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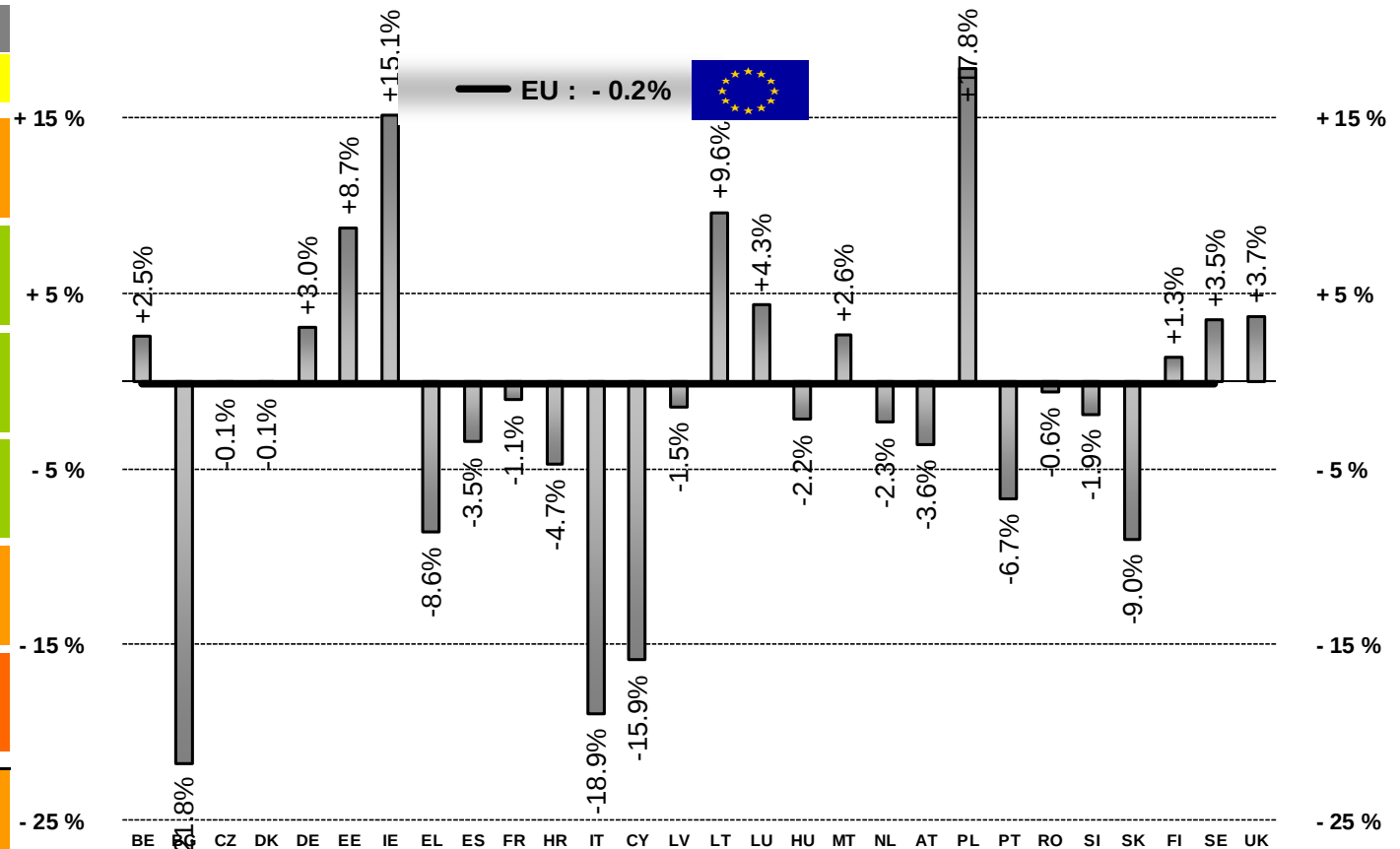
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PRODUCTION

% EVOLUTION TONNES



TONNES	Jan-Aug 13/14	
	EU15	EU28
Bull	-4.4%	-2.1%
Bullock	+9.1%	+9.1%
Cow	+0.7%	+1.3%
Heifer	+1.8%	+2.4%
Calve	-2.2%	-2.7%
Young cattle	-10.5%	-10.6%
Meat of bovine animals	-1.1%	-0.2%



Estimates for last month of period :

Source : EStat - Newcronos

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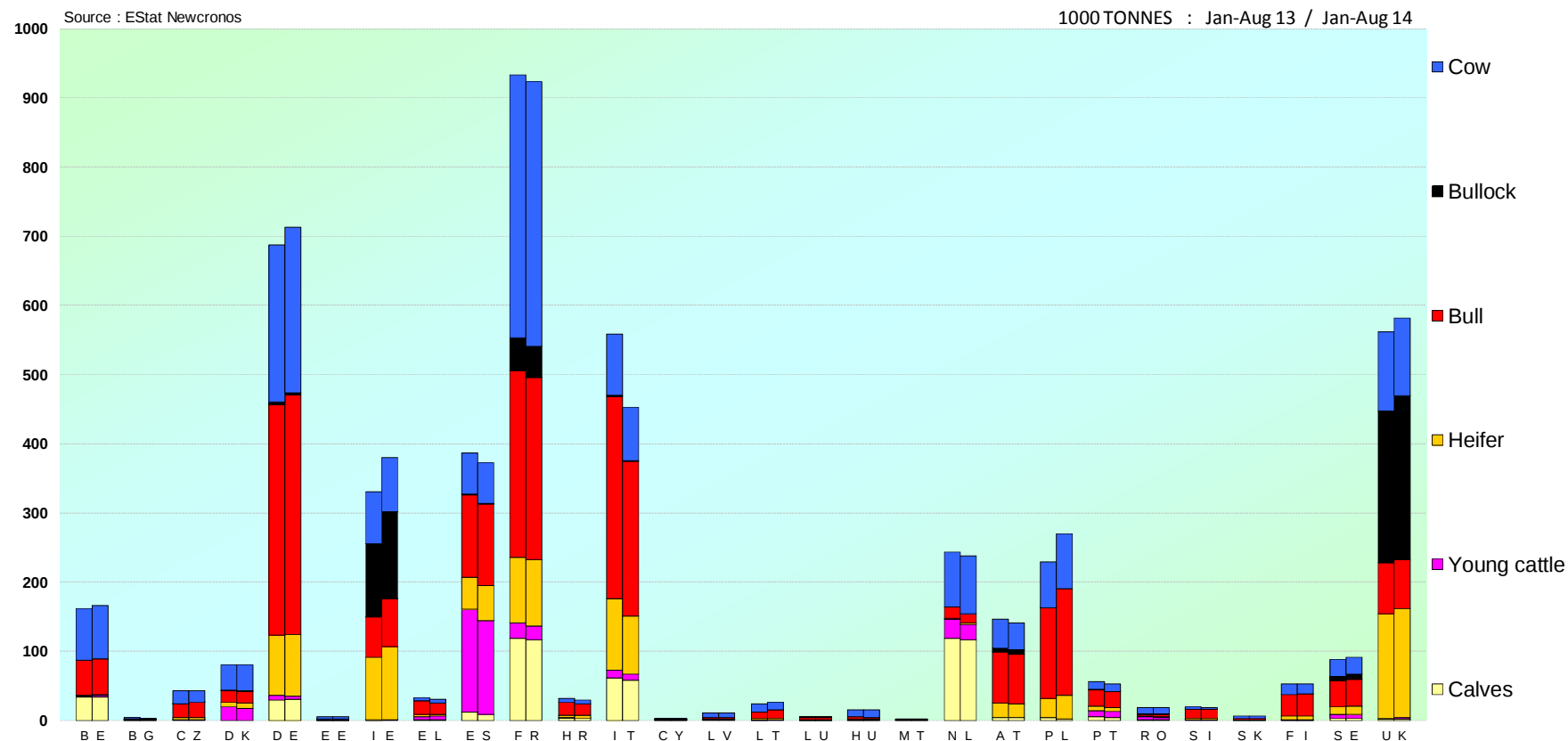
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PRODUCTION

Abs.Value

EVOLUTION

TONNES



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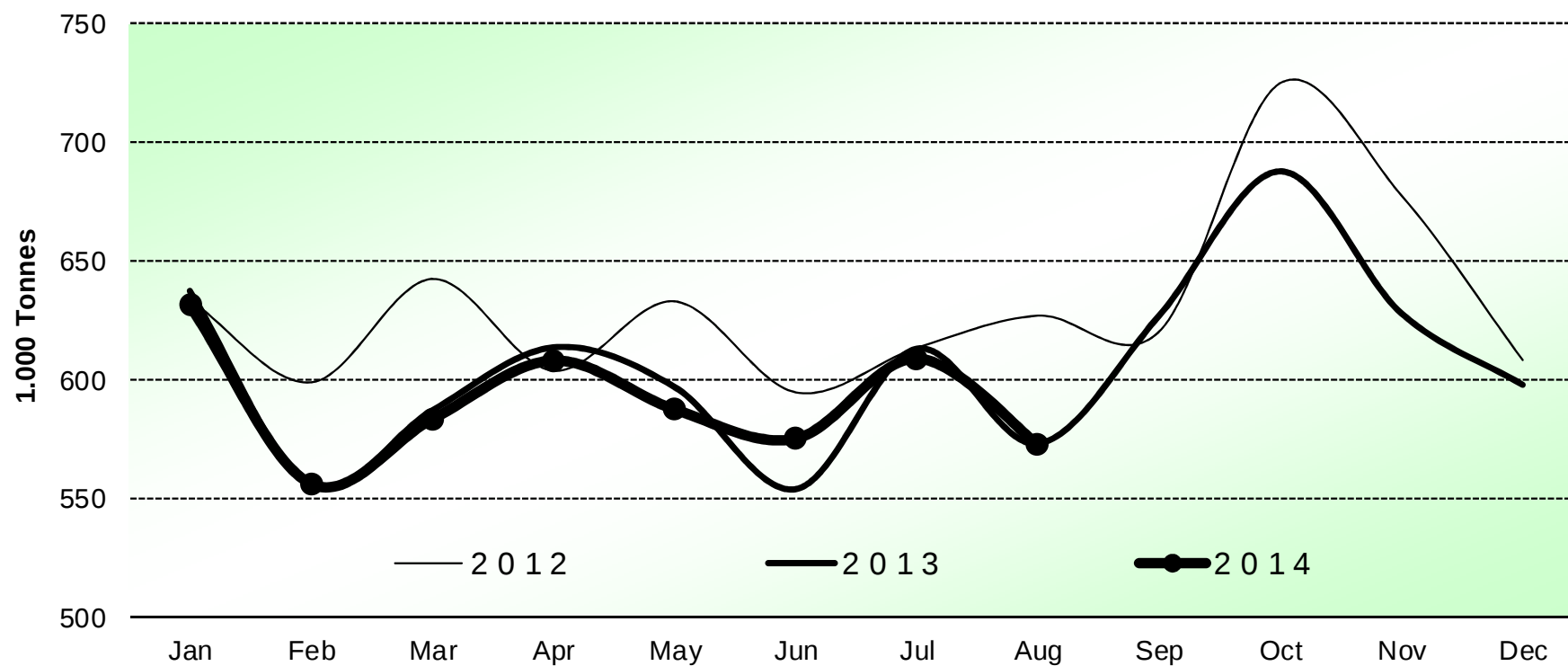
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PRODUCTION

HISTORIC TONNES



Beef & Veal Production (E28 Slaughtering) - Tonnes



Source : EStat-Newcronos

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PRODUCTION

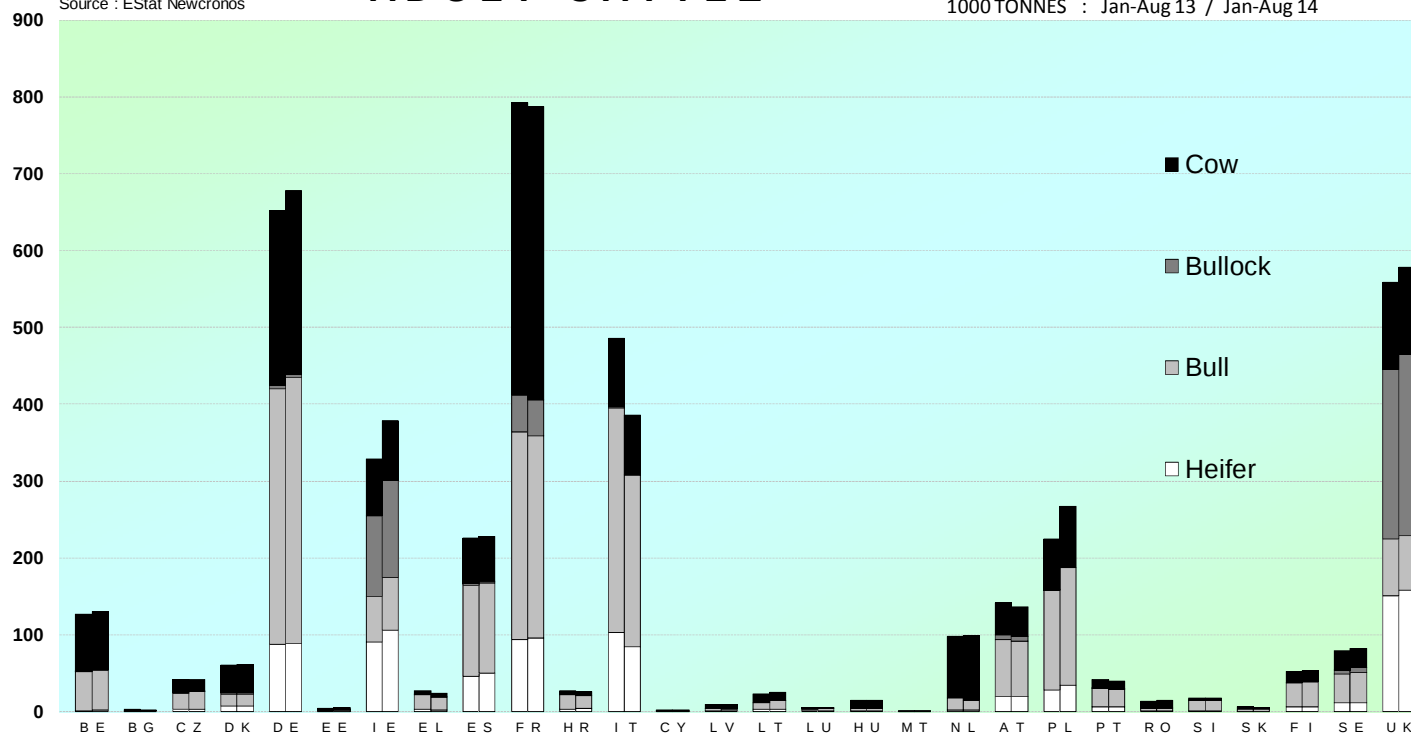
E.U. EVOLUTION ADULT CATTLE



ADULT CATTLE

Source : EStat Newcronos

1000 TONNES : Jan-Aug 13 / Jan-Aug 14



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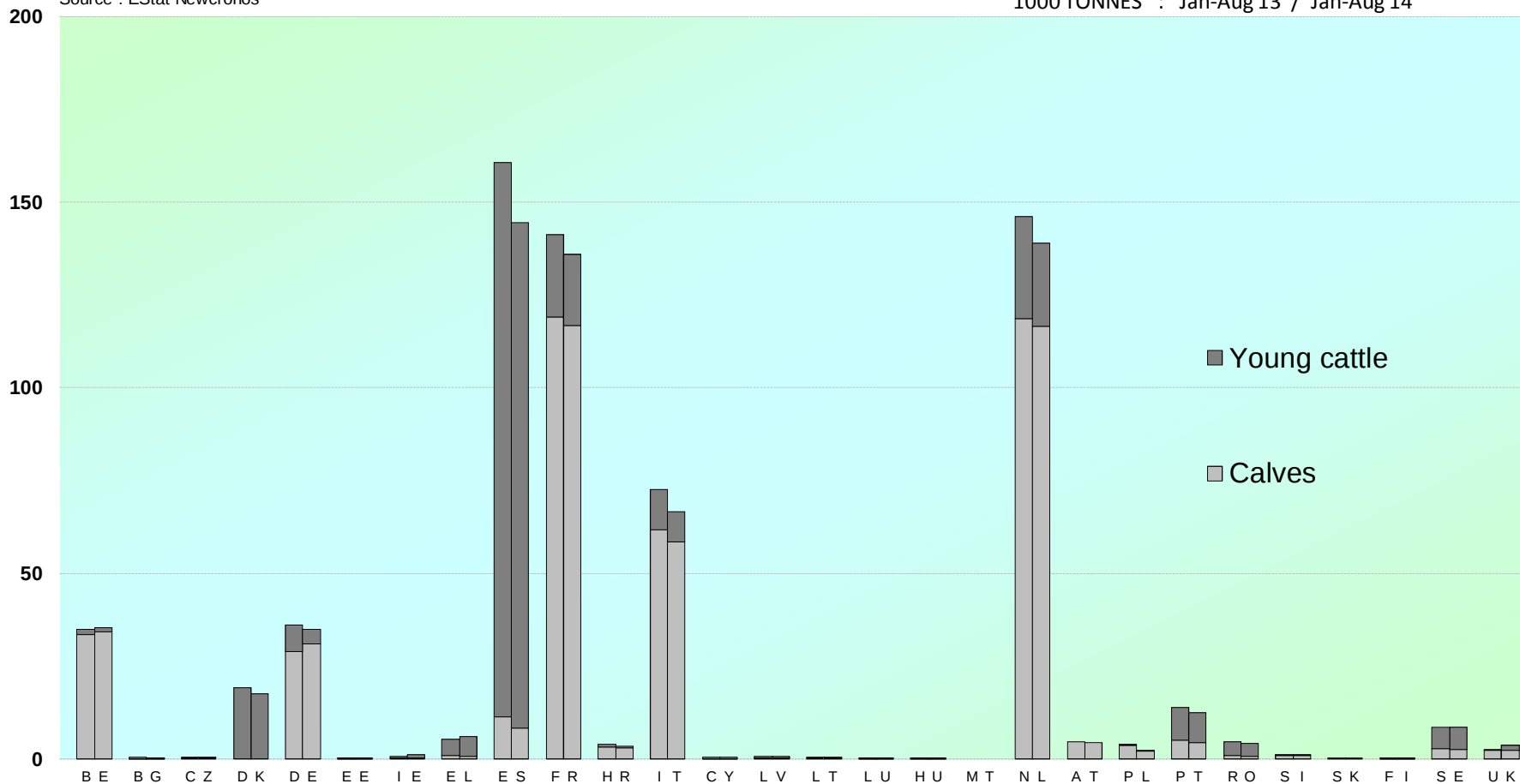
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YOUNG CATTLE & CALVES

Source : EStat Newcronos

1000 TONNES : Jan-Aug 13 / Jan-Aug 14



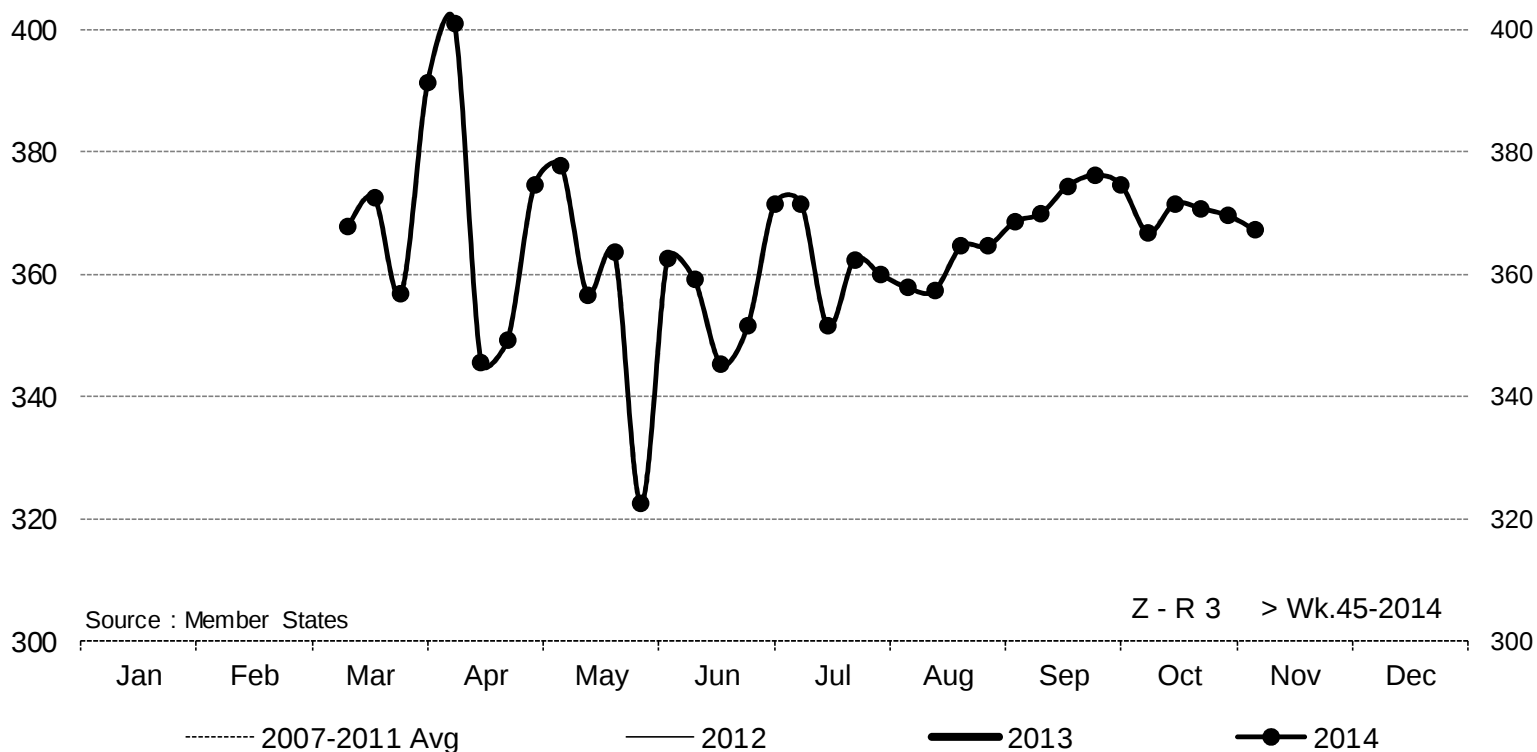
20 November 2014

PRICES CARCASSES



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

Z - R 3 > Wk.45-2014



Price in week 45 : **367.35**

Average price in October 2014 : **370.49**

20 November 2014

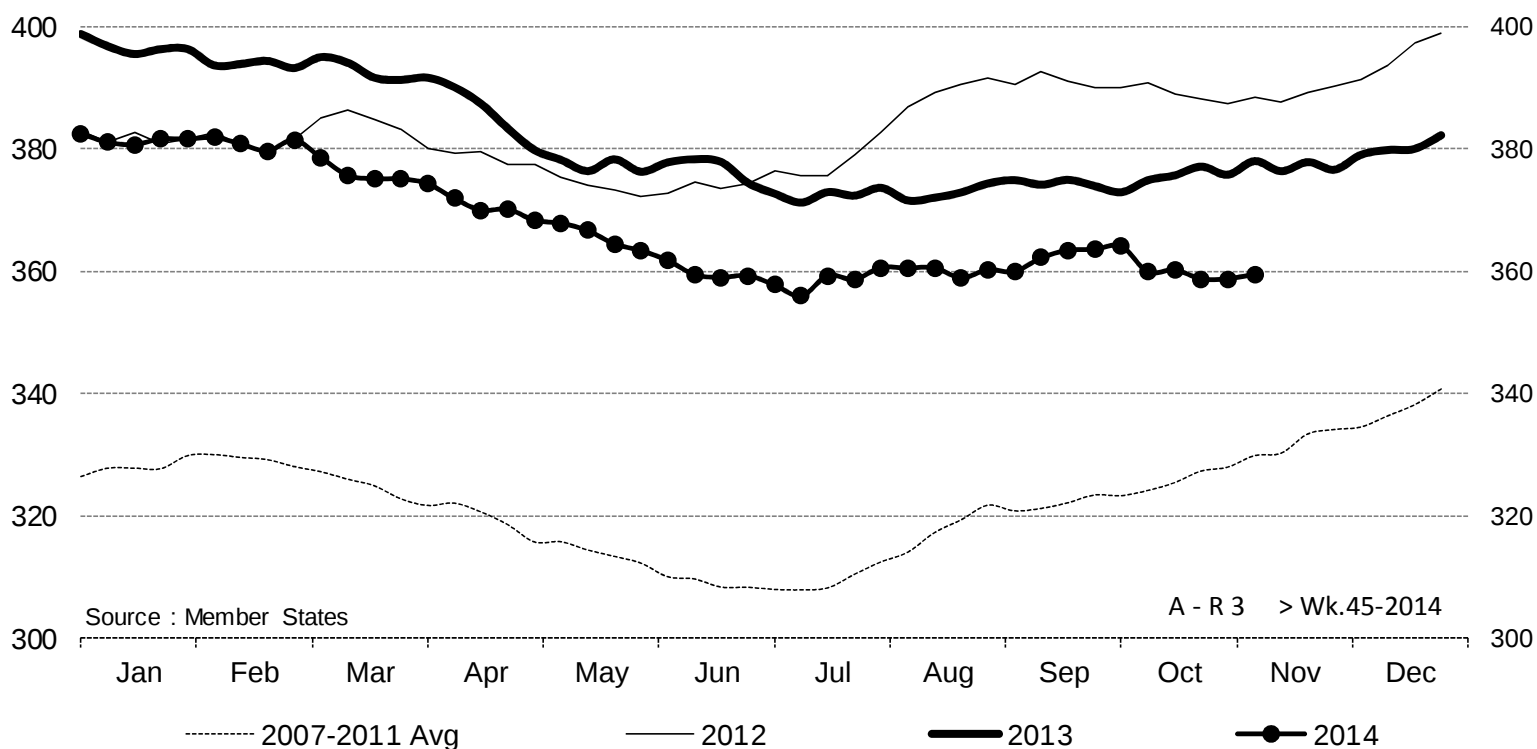
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PRICES CARCASSES



E.U. EVOLUTION YOUNG BULL – A.R3

A - R 3 > Wk.45-2014



Price in week 45 : **359.55**
% change y/y : **- 4.9%**

Average price in October 2014 : **360.24**
% change y/y : **- 4.0%**

20 November 2014

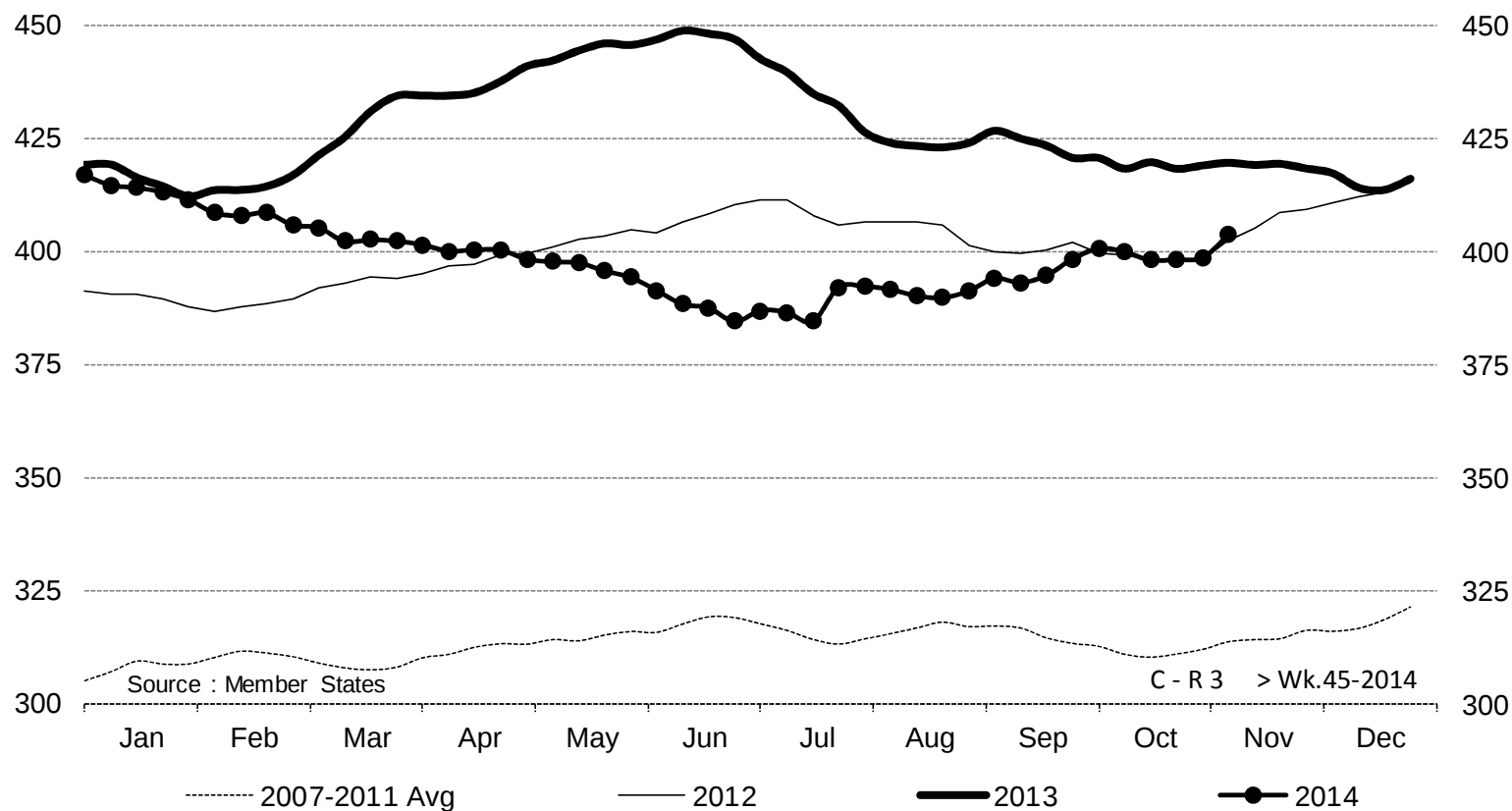
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PRICES CARCASSES



E.U. EVOLUTION STEER – C.R3

C - R 3 > Wk.45-2014



Price in week 45 : **403.65**
% change y/y : **- 3.8%**

Average price in October 2014 : **398.95**
% change y/y : **- 4.8%**

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PRICES CARCASSES

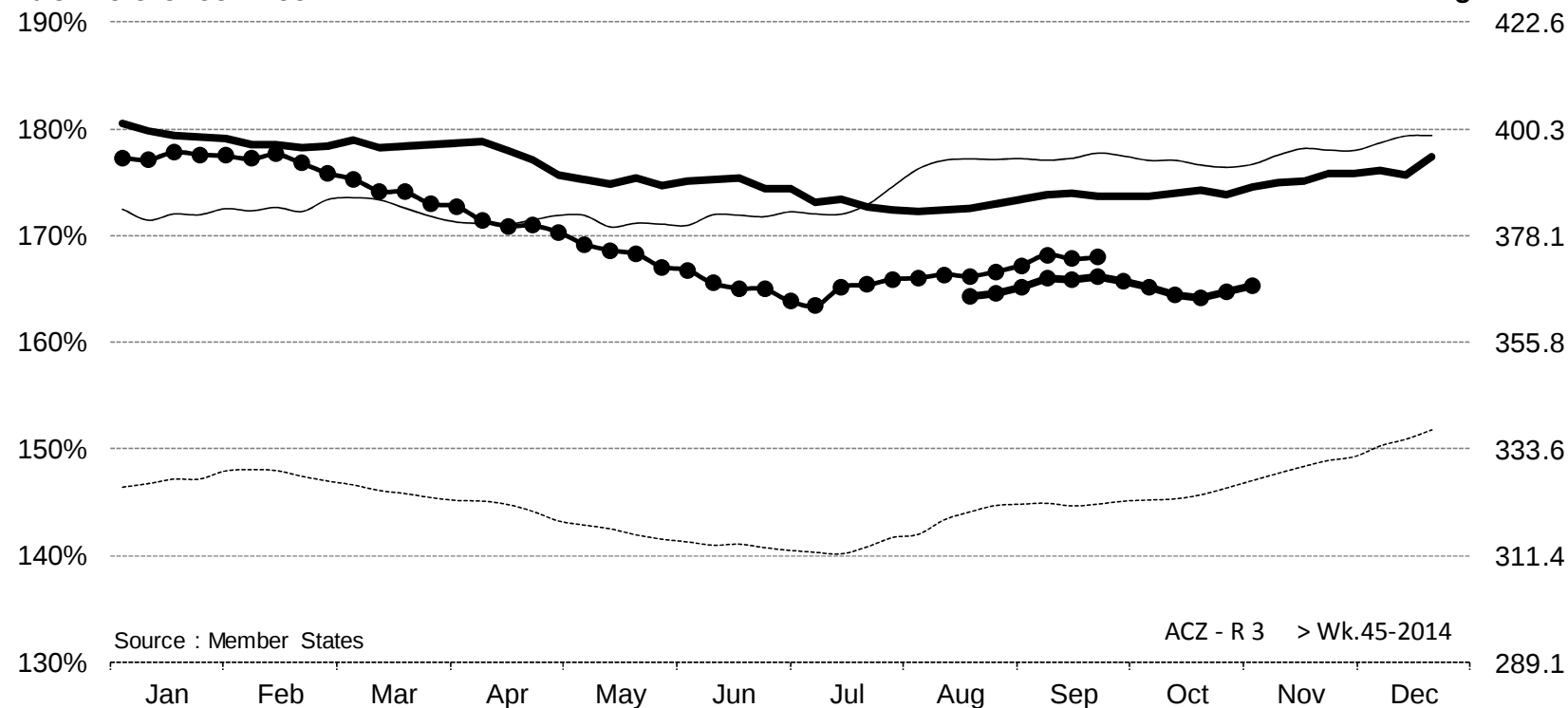
E.U. EVOLUTION
A/C/Z.R3



ACZ - R 3 > Wk.45-2014

% of Reference Price

€/100 kg cwe



Source : Member States

ACZ - R 3 > Wk.45-2014

----- 2007-2011 Avg

—— 2012

Price in week 45 : **367.45**

% change y/y : **- 5.4%**

% Ref. Price in wk 45 : **165.2%**

Average price in October 2014 : **366.51**

% change y/y : **- 5.2%**

20 November 2014

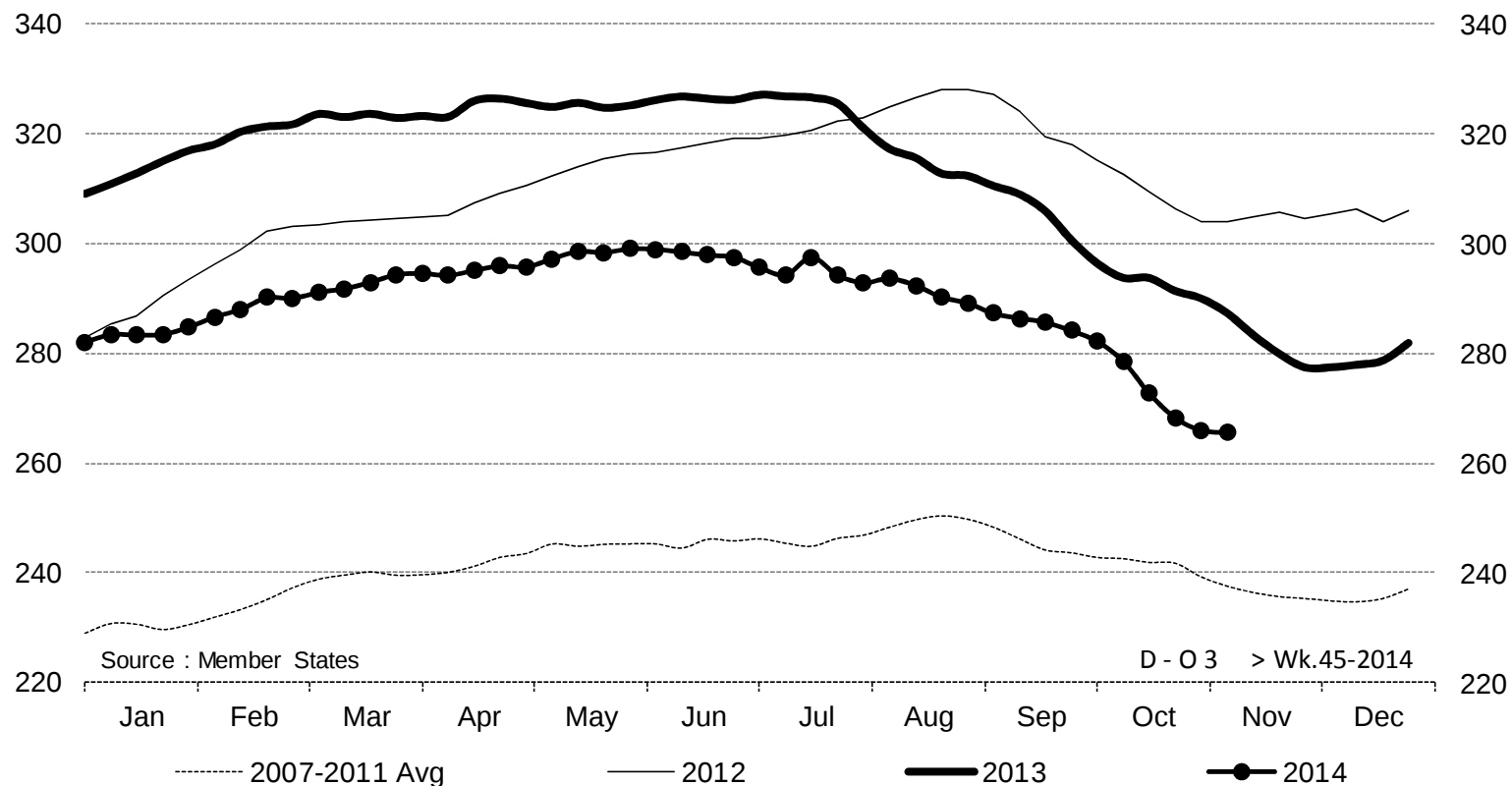
Agriculture
and Rural
Development

PRICES CARCASSES

E.U. EVOLUTION
COW – D.O3



D - O 3 > Wk.45-2014



Price in week 45 : **265.55**
% change y/y : **- 7.6%**

Average price in October 2014 : **273.48**
% change y/y : **- 6.7%**

20 November 2014

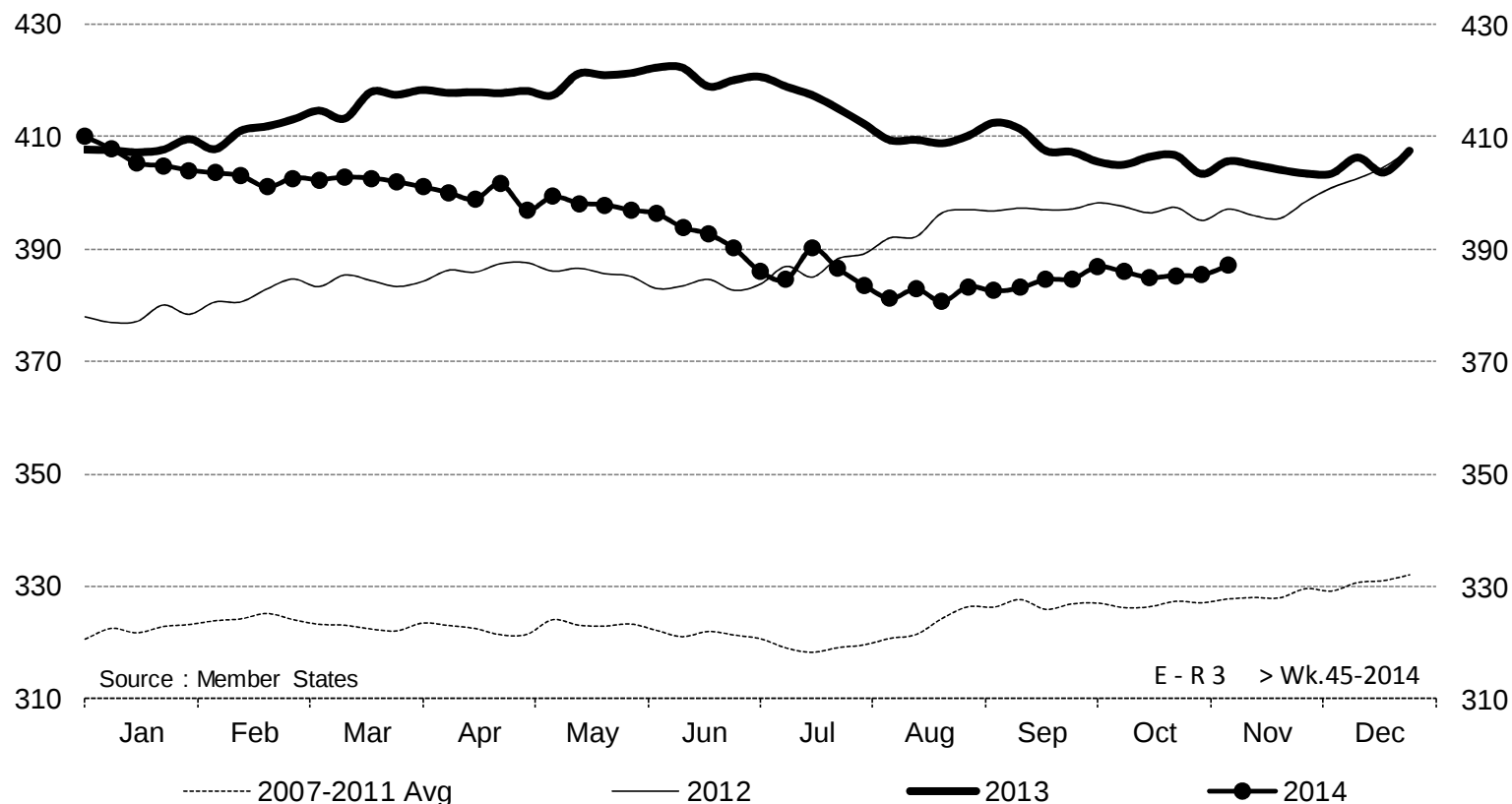
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and Rural
Development

PRICES CARCASSES



E.U. EVOLUTION HEIFER - E.R3

E - R 3 > Wk.45-2014



Price in week 45 : **387.05**
% change y/y : **- 4.6%**

Average price in October 2014 : **385.64**
% change y/y : **- 4.9%**

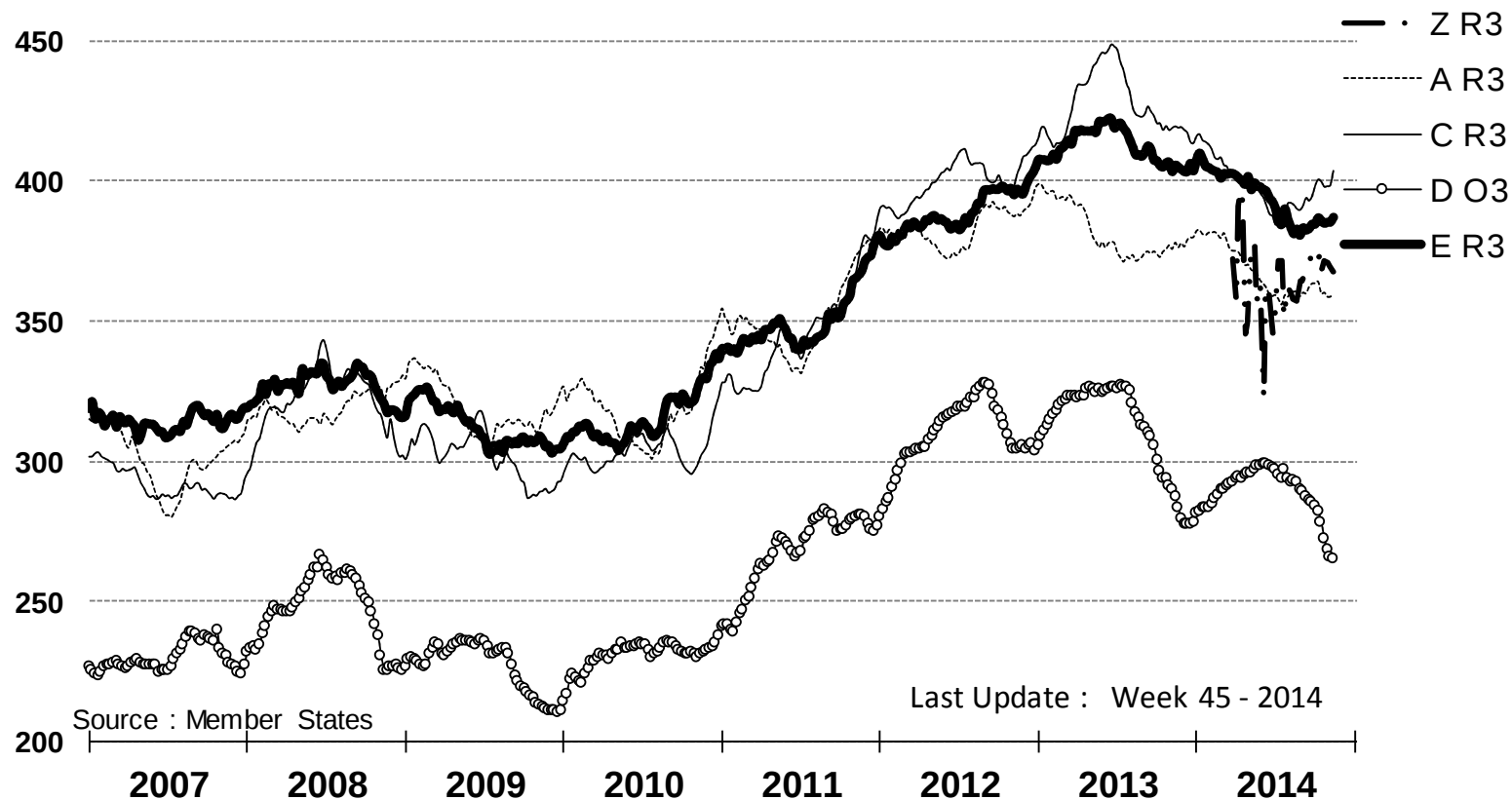
20 November 2014

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PRICES CARCASSES



E.U. EVOLUTION All CAT GLOBAL VIEW



20 November 2014

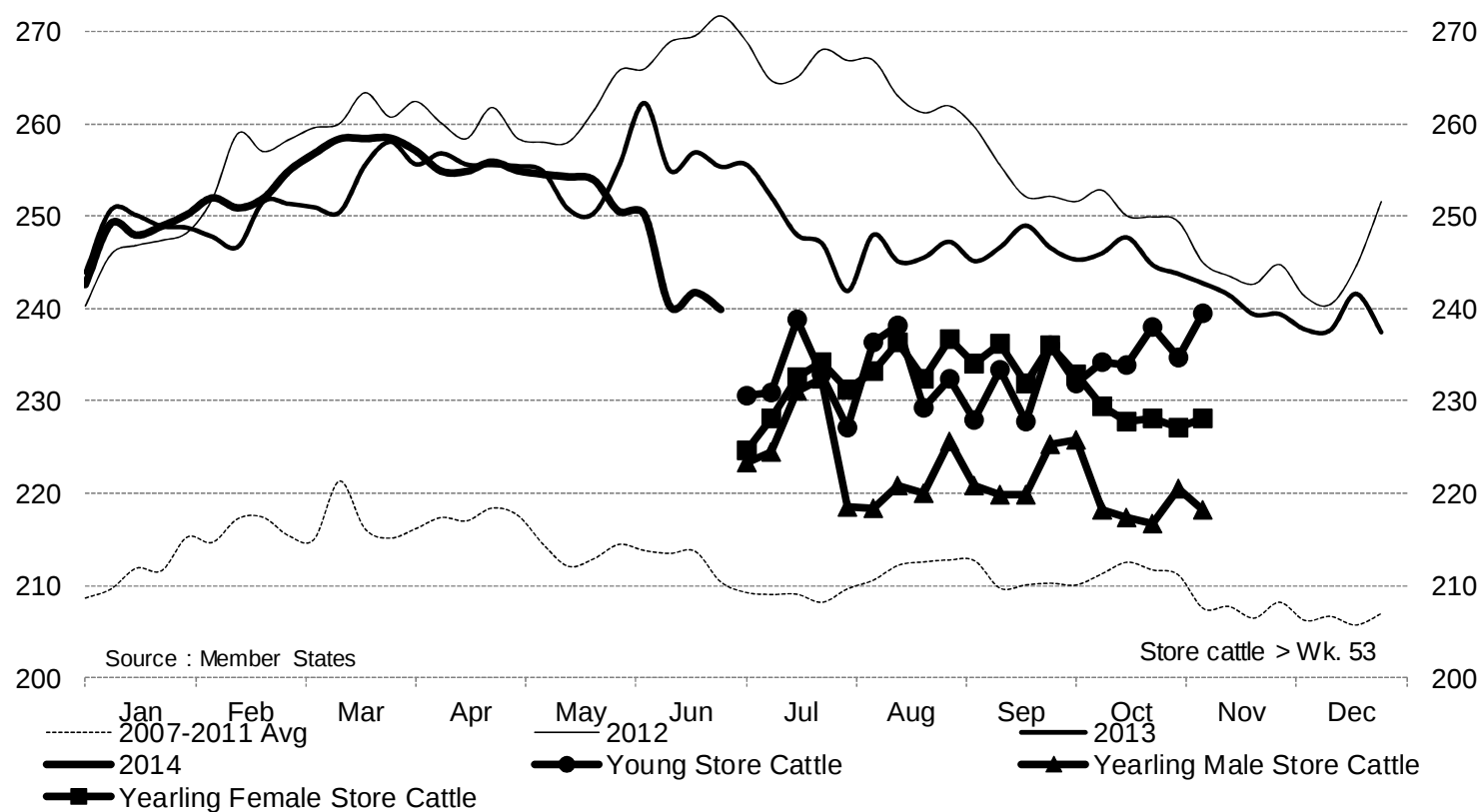
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Development

PRICES LIVE BOVINES



E.U. EVOLUTION MALE STORE CATTLE

Store cattle (€/100 kg live weight)



Young Store Cattle Price in	Week 45	2.39	Yearling Male Store Cattle Price in	Week 45	2.18
Yearling Female Store Cattle Price in	Week 45	2.28	€/kg live weight		

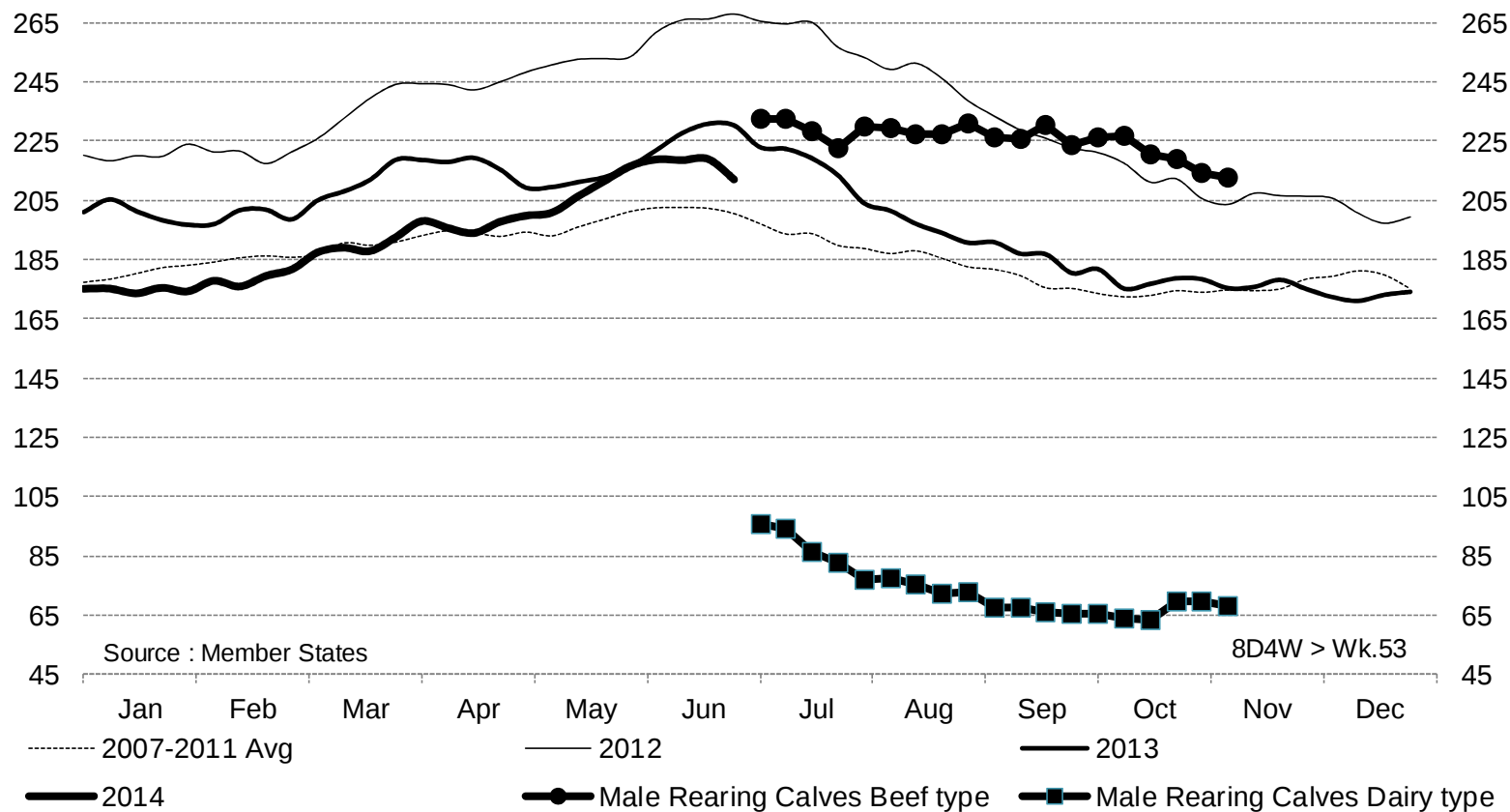
20 November 2014

PRICES LIVE BOVINES



E.U. EVOLUTION Male Calves – 8D4W

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



Male Rearing Calves Beef type Price in Week 45 212.70 Male Rearing Calves Dairy type Price in Week 45 67.91

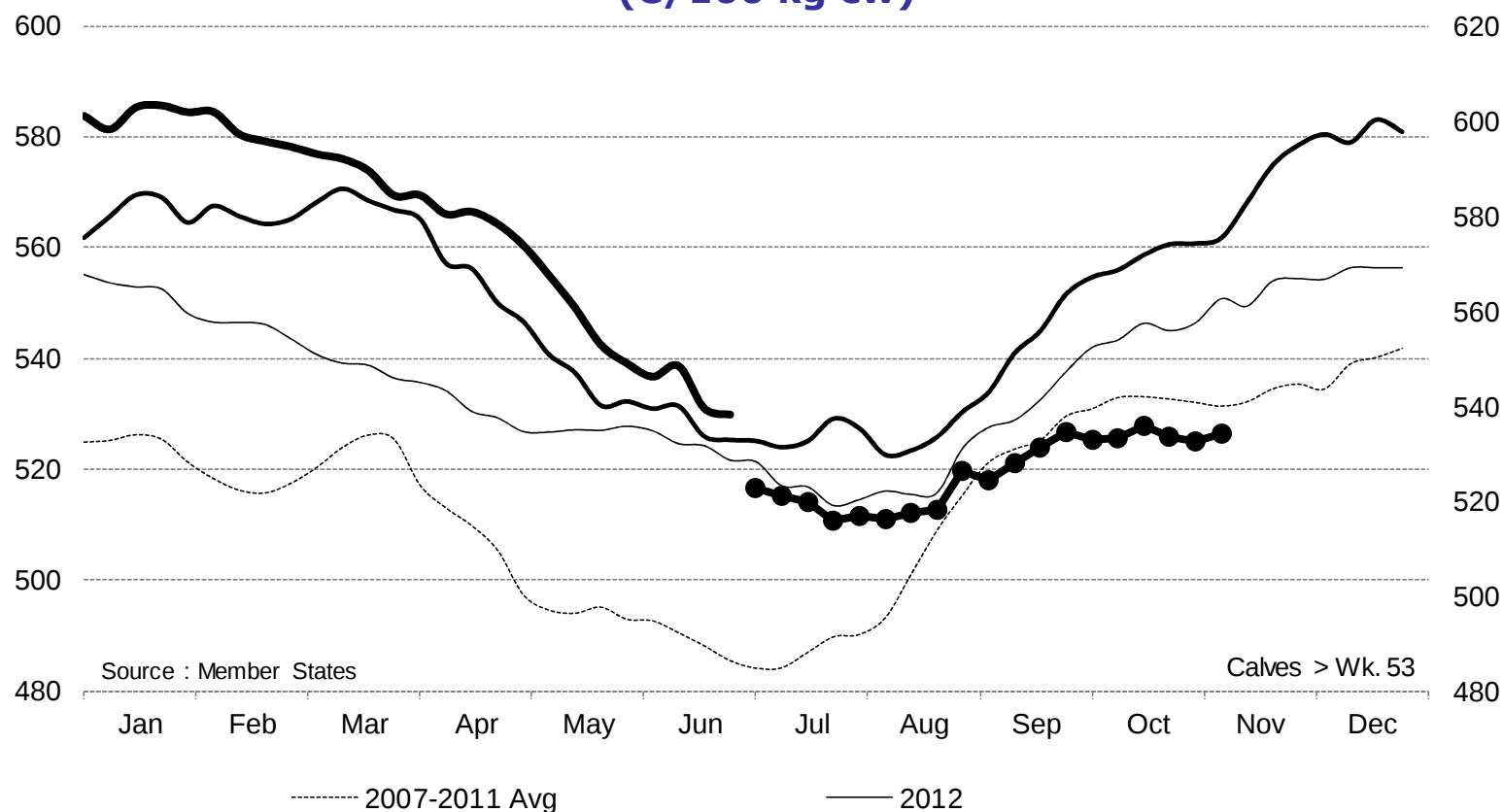
20 November 2014

PRICES LIVE BOVINES



E.U. EVOLUTION Butcher Calves

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



Price in Week 45 534.20 € / 100 kg of carcasse weight

20 November 2014

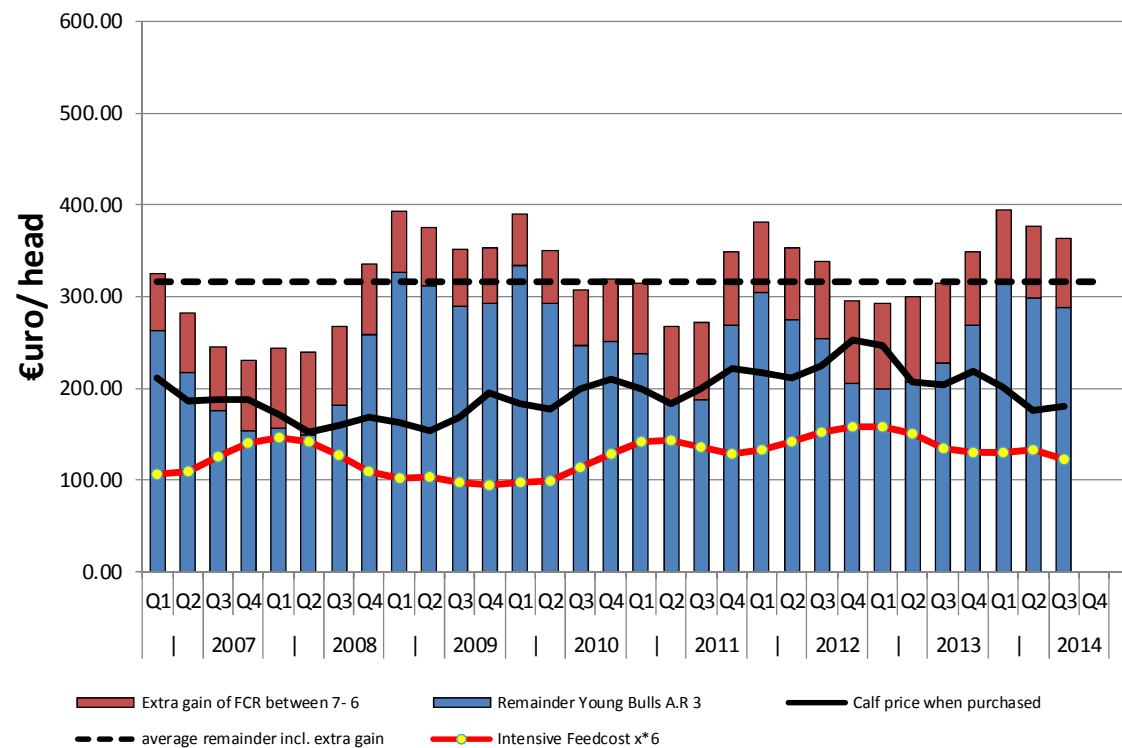
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MARGIN



E.U. EVOLUTION Animal + Feed Purchase COST

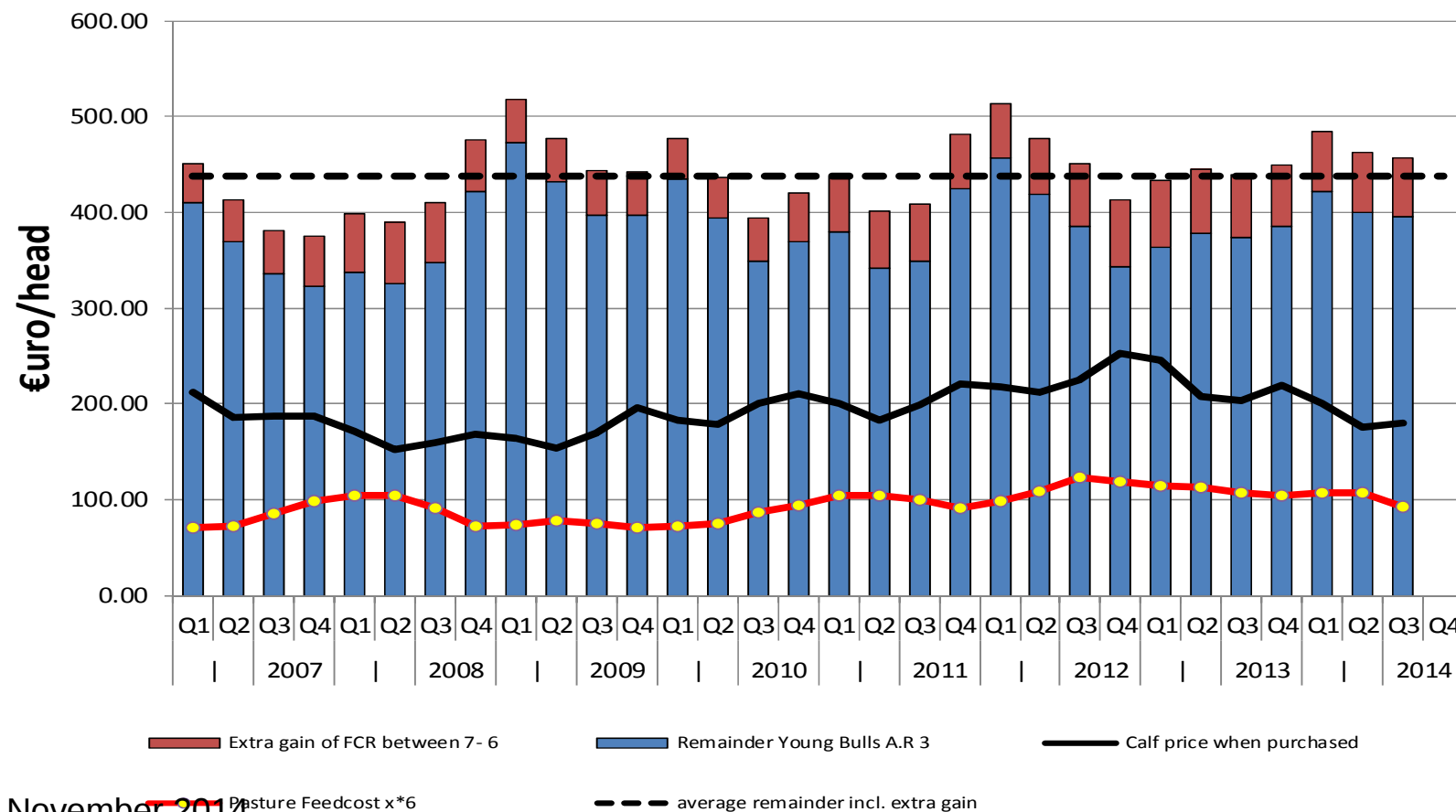
Remainder of: Selling price AR 3, minus costs for calf purchased and feedcost for grain fattening



20 November 2014



Remainder of: Selling price AR 3, minus costs for calf purchased and feedcost for grain/ grass fattening



20 November 2014



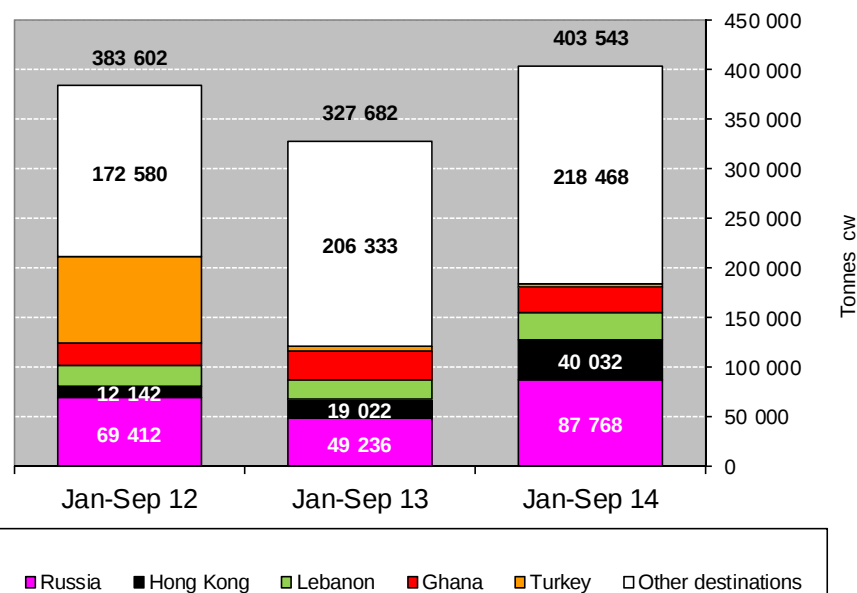
EU exports of beef and live animals (1): Trade figures (COMEXT – tonnes cwe)

Destinations	2010		2011		2012		2013		Jan-Sep 14		Compared to Jan-Sep 13
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Russia	135 991	28.7%	138 910	22.3%	97 829	19.2%	72 299	15.9%	87 768	21.7%	+ 78.3%
Hong Kong	12 292	2.6%	19 449	3.1%	17 895	3.5%	28 536	6.3%	40 032	9.9%	+ 110.5%
Lebanon	35 814	7.6%	25 200	4.0%	27 474	5.4%	26 367	5.8%	27 807	6.9%	+ 45.9%
Ghana	11 561	2.4%	21 979	3.5%	28 693	5.6%	40 793	9.0%	25 897	6.4%	- 12.5%
Bosnia-Herz.	17 082	3.6%	21 423	3.4%	19 715	3.9%	26 844	5.9%	24 809	6.1%	+ 37.6%
Switzerland	22 619	4.8%	26 720	4.3%	19 911	3.9%	26 574	5.9%	21 284	5.3%	+ 4.9%
Ivory Coast	14 831	3.1%	18 177	2.9%	15 929	3.1%	21 620	4.8%	20 498	5.1%	+ 37.2%
Algeria	16 259	3.4%	17 970	2.9%	17 324	3.4%	25 935	5.7%	12 252	3.0%	- 28.1%
Libya	2 551	0.5%	2 473	0.4%	11 974	2.4%	18 628	4.1%	11 348	2.8%	- 19.3%
Angola	5 228	1.1%	8 935	1.4%	8 258	1.6%	10 590	2.3%	8 755	2.2%	+ 27.8%
For.JRep.Mac	9 713	2.1%	13 244	2.1%	11 447	2.3%	10 630	2.3%	8 538	2.1%	+ 8.5%
Israel	9 234	2.0%	8 720	1.4%	8 435	1.7%	9 378	2.1%	6 349	1.6%	- 15.1%
Norway	1 636	0.3%	7 115	1.1%	14 621	2.9%	10 247	2.3%	6 219	1.5%	- 37.1%
Uzbekistan	419	0.1%	4 271	0.7%	4 196	0.8%	7 729	1.7%	5 972	1.5%	+ 1.5%
China	1 375	0.3%	3 808	0.6%	5 561	1.1%	7 532	1.7%	5 883	1.5%	+ 3.2%
Turkey	71 029	15.0%	166 776	26.7%	101 474	20.0%	5 151	1.1%	3 571	0.9%	- 19.6%
Other Destinations	105 494	22.3%	118 936	19.1%	97 736	19.2%	104 949	23.1%	86 561	21.5%	
EXTRA EU	473 128		624 104		508 473		453 803		403 543		
% change			+ 32%		- 19%		- 11%		+ 23.2%		

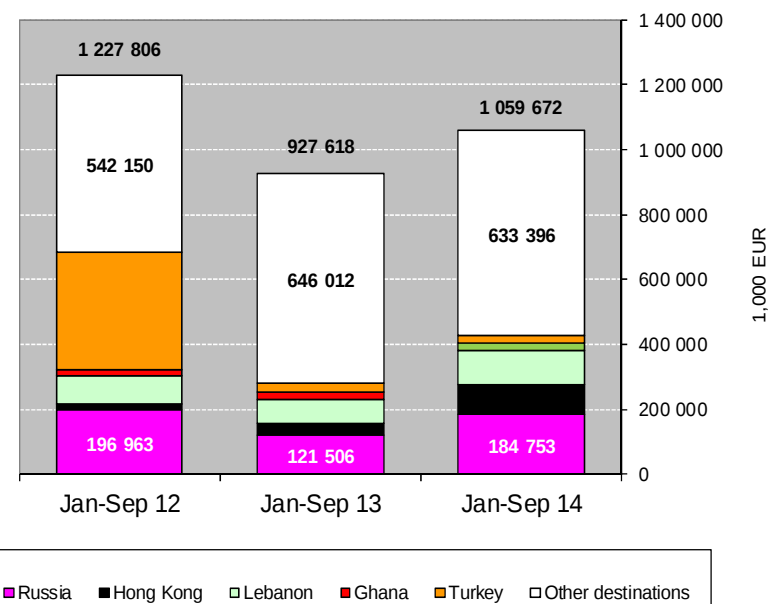
20 November 2014

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

EU EXPORTS of Beef & Veal (Tonnes cwe)

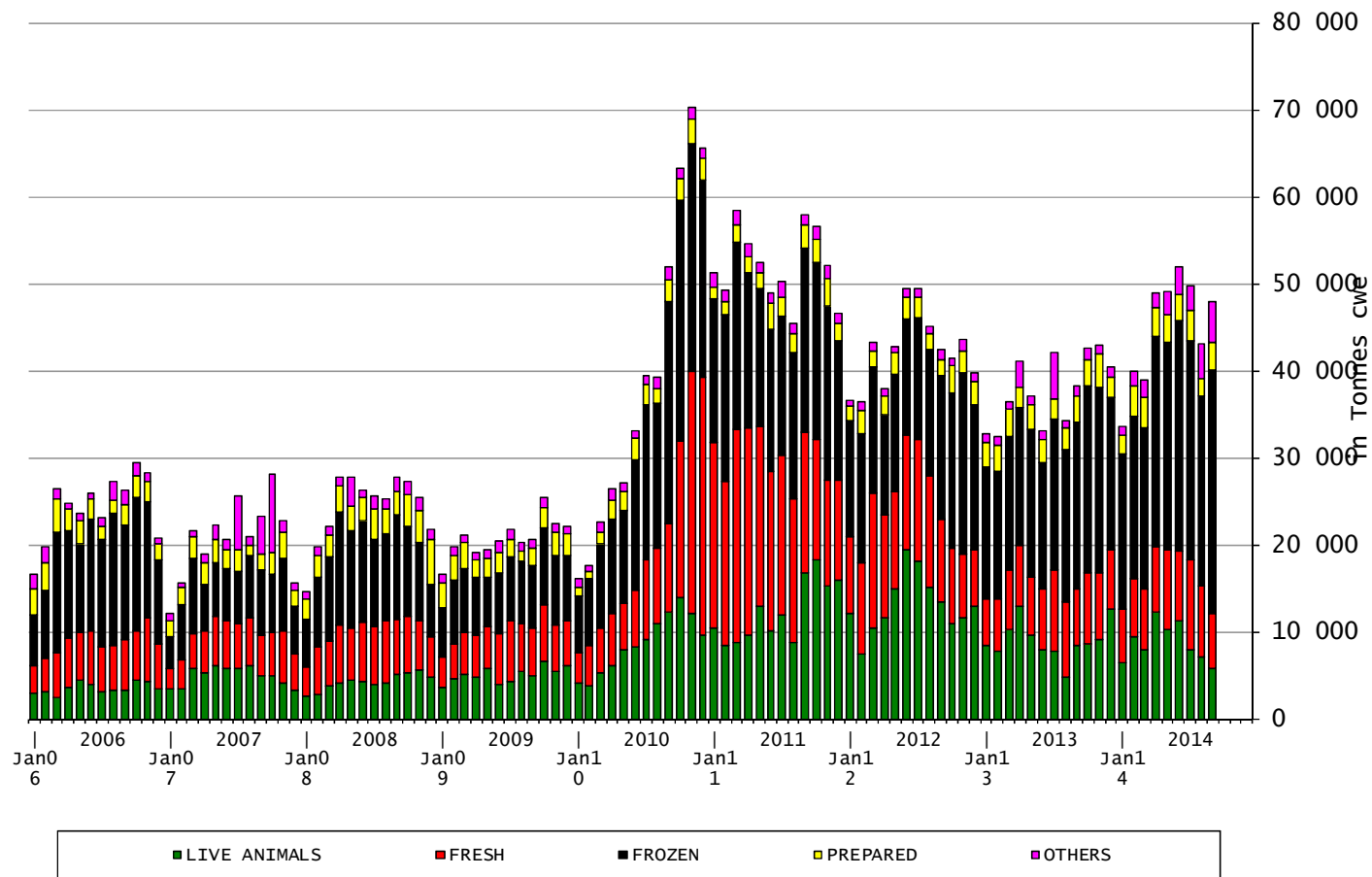


EU EXPORTS of Beef & Veal (1000 EUR)



20 November 2014

EU-28 Exports of BEEF products



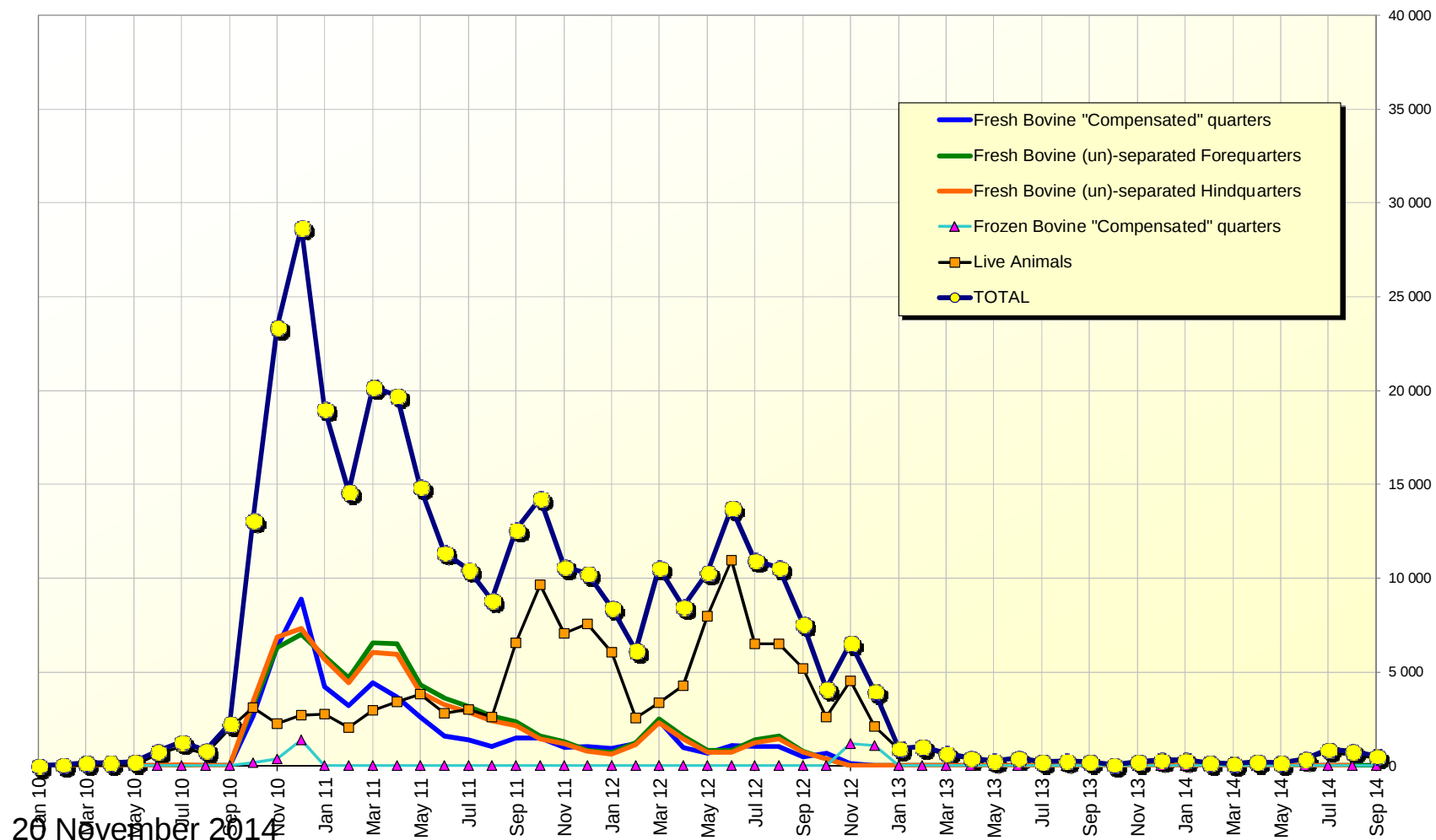
20 November 2014

TRADE

E.U. EXPORTS Beef to TURKEY



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

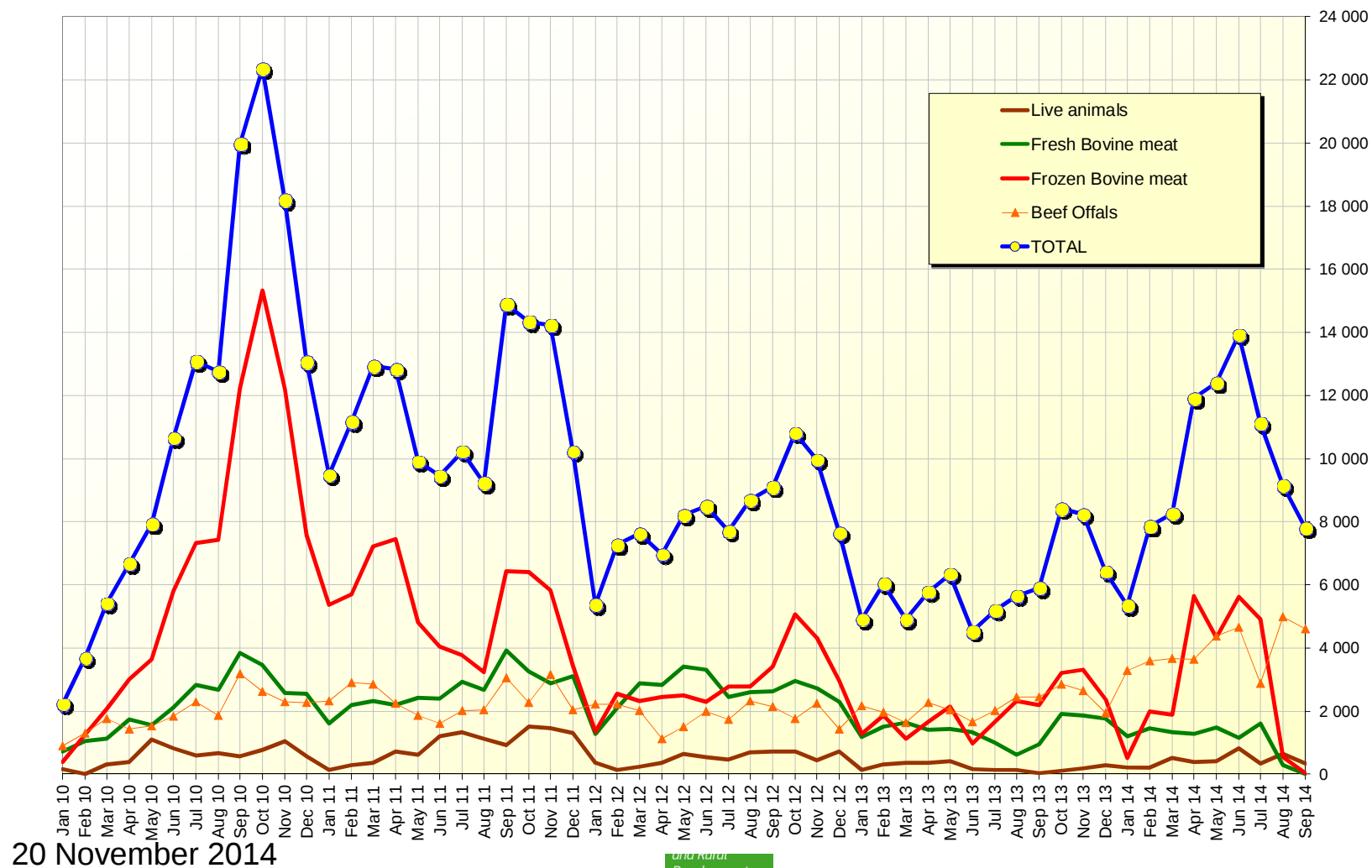


TRADE

E.U. EXPORTS Beef to RUSSIA

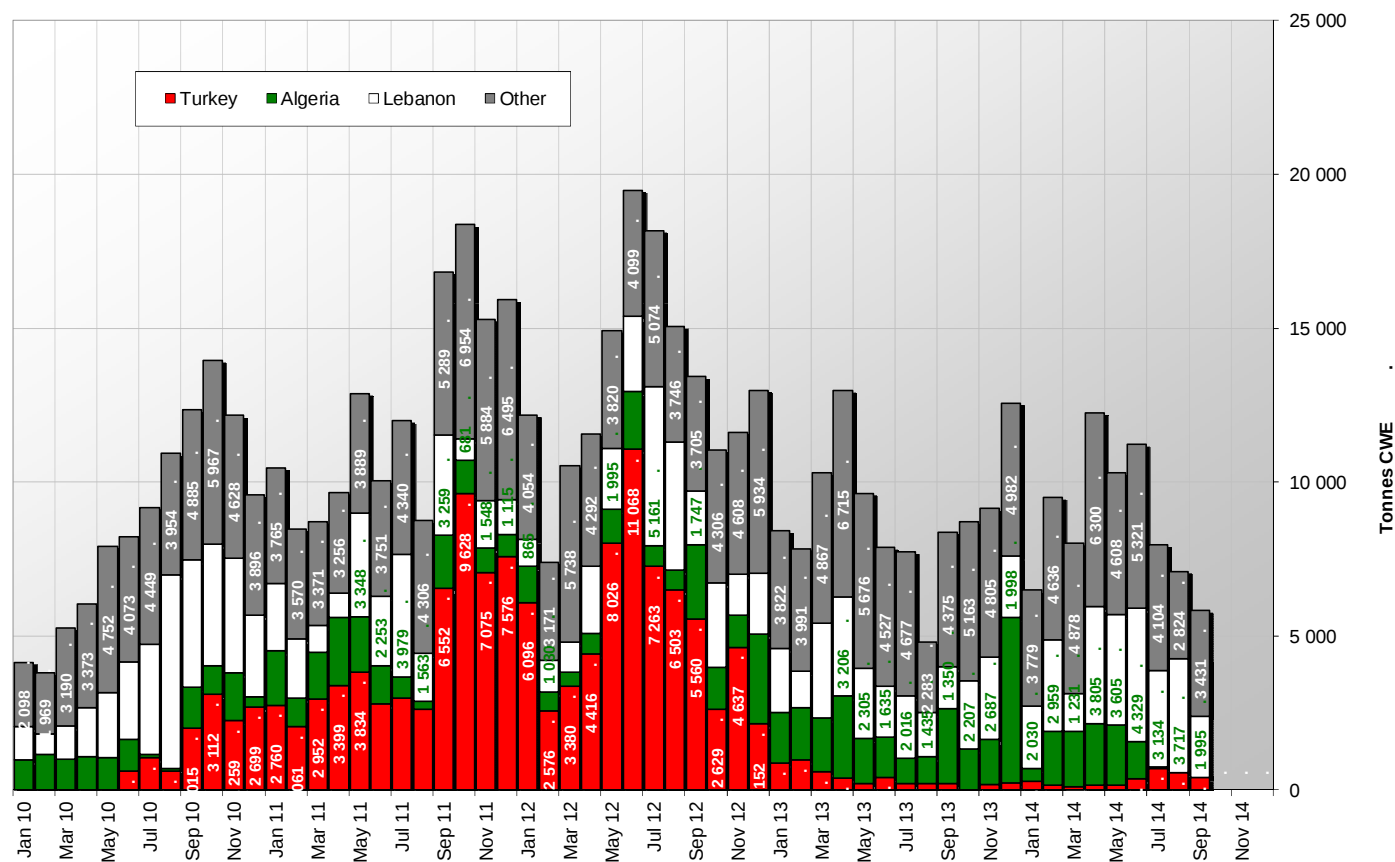


EU beef Exports to RUSSIA Trade figures (COMEXT data) tonnes cwe





EU-28 Exports of LIVE Bovine Animals (Source COMEXT - Tonnes cwe)



20 November 2014



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

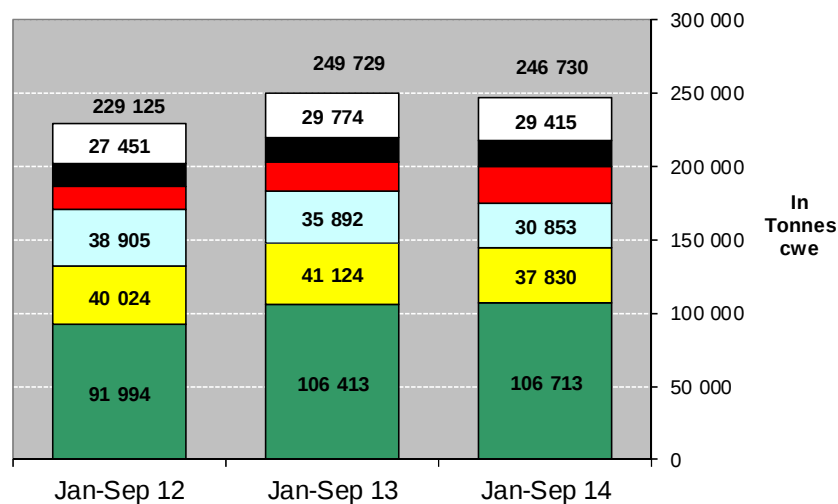
Origins	2010		2011		2012		2013		Jan-Sep 14		Compared to Jan-Sep 13
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	145 105	38.2%	126 142	39.1%	126 927	41.3%	145 969	43.6%	106 713	43.3%	+ 0.3%
Uruguay	67 160	17.7%	51 936	16.1%	52 579	17.1%	51 612	15.4%	37 830	15.3%	- 8.0%
Argentina	80 186	21.1%	62 705	19.4%	51 697	16.8%	47 935	14.3%	30 853	12.5%	- 14.0%
Australia	13 810	3.6%	18 278	5.7%	21 311	6.9%	28 108	8.4%	24 696	10.0%	+ 23.4%
USA	15 308	4.0%	22 999	7.1%	21 097	6.9%	22 298	6.7%	17 223	7.0%	+ 4.3%
New Zealand	13 712	3.6%	15 471	4.8%	15 377	5.0%	13 958	4.2%	11 868	4.8%	+ 1.6%
Namibia	13 571	3.6%	9 005	2.8%	8 848	2.9%	11 113	3.3%	7 140	2.9%	- 12.4%
Switzerland	4 461	1.2%	5 661	1.8%	4 948	1.6%	4 286	1.3%	4 032	1.6%	+ 35.0%
Botswana	15 763	4.1%	980	0.3%	474	0.2%	6 280	1.9%	3 125	1.3%	- 35.5%
Canada	716	0.2%	917	0.3%	826	0.3%	975	0.3%	651	0.3%	- 2.8%
Ukraine	0	0.0%	0	0.0%	0	0.0%	0	0.0%	570	0.2%	+++
Chile	2 441	0.6%	2 254	0.7%	1 710	0.6%	538	0.2%	558	0.2%	+ 21.1%
Russia	41	0.0%	100	0.0%	72	0.0%	150	0.0%	467	0.2%	+++
Serbia	1 127	0.3%	789	0.2%	742	0.2%	618	0.2%	328	0.1%	- 32.7%
Norway	293	0.1%	263	0.1%	150	0.0%	201	0.1%	232	0.1%	+ 103.7%
N.det.Extra	34	0.0%	5	0.0%	1	0.0%	0	0.0%	100	0.0%	+++
Iceland	203	0.1%	399	0.1%	241	0.1%	196	0.1%	89	0.0%	+ 2.1%
Other Origins	5 980	1.6%	4 617	1.4%	387	0.1%	234	0.1%	255	0.1%	
EXTRA EU	379 910		322 521		307 388		334 472		246 730		
% change			- 15%		- 5%		+ 9%		- 1.2%		

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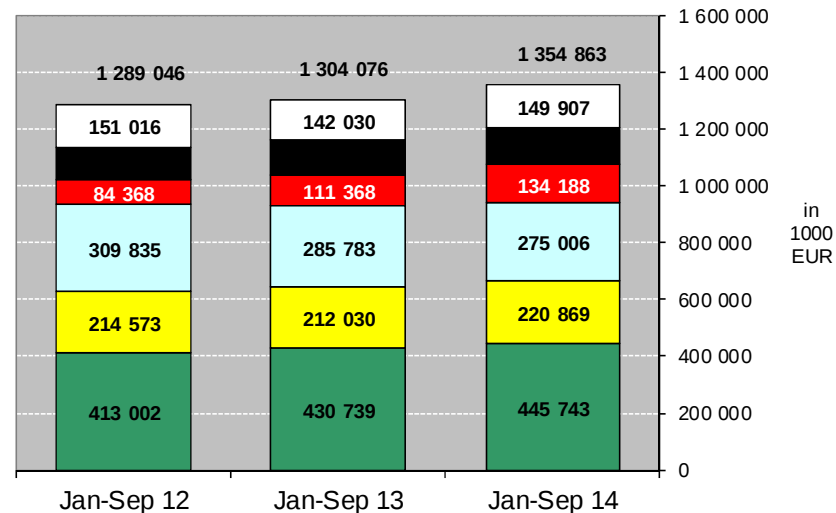
EU imports of beef and live animals (2): Trade figures (COMEXT)

IMPORTS of Beef & Veal into EU (Tonnes cwe)



■ Brazil ■ Uruguay □ Argentina ■ Australia ■ USA □ Other origins

IMPORTS of Beef & Veal into EU (1000 EUR)

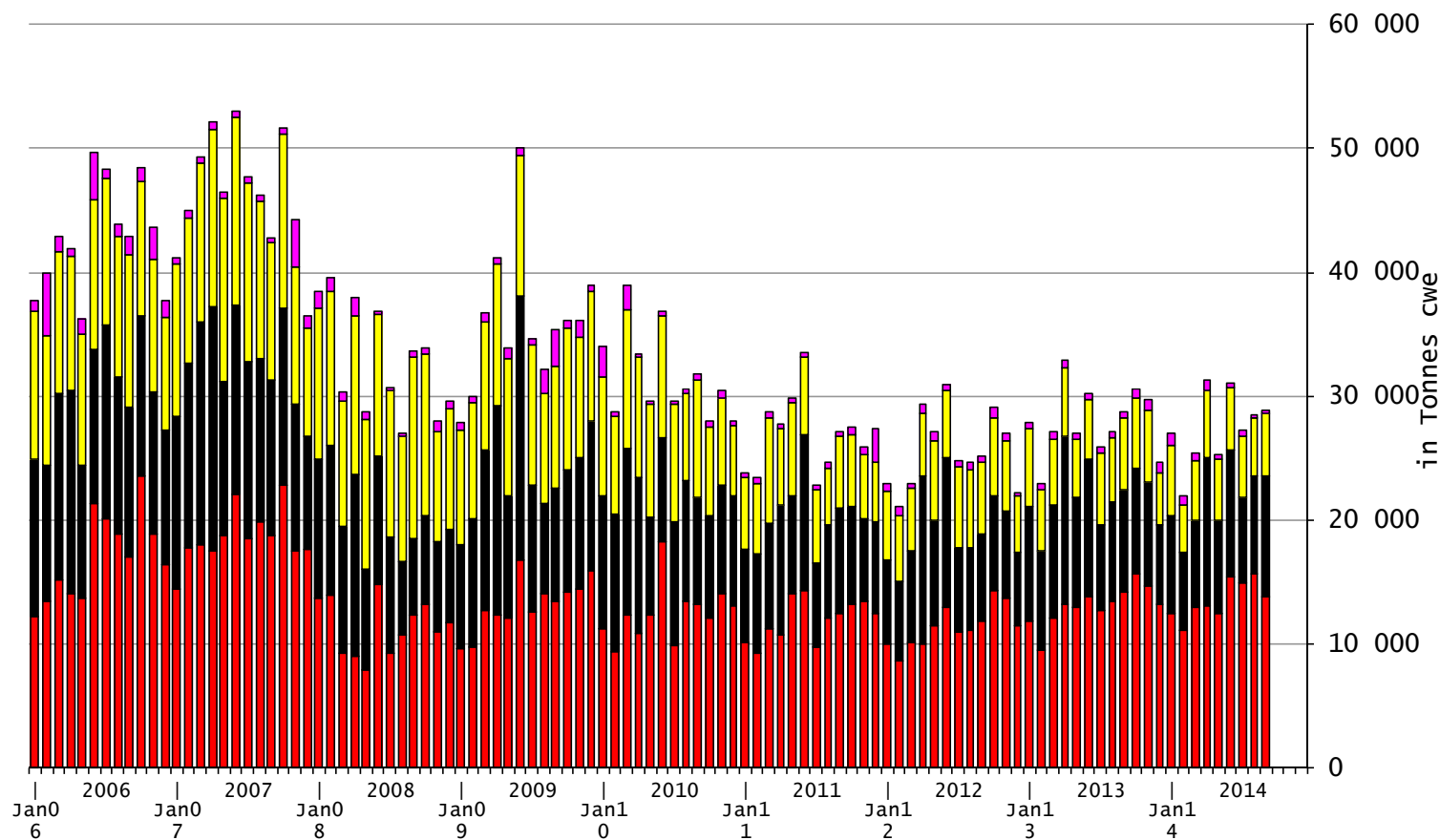


■ Brazil ■ Uruguay □ Argentina ■ Australia ■ USA □ Other origins

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EU-28 Imports of BEEF products



20 November 2014

FRESH

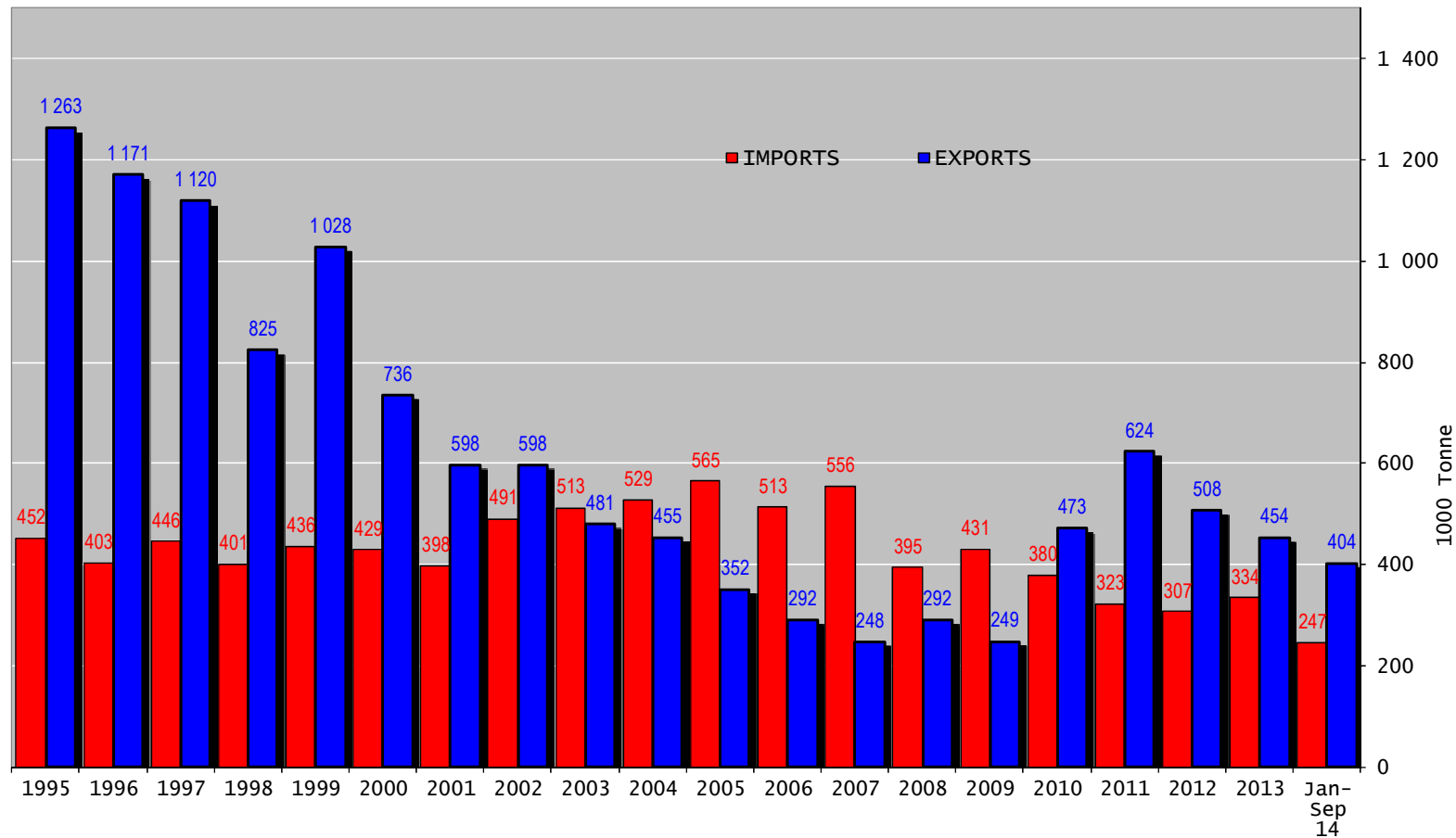
FROZEN

PREPARED

OTHERS



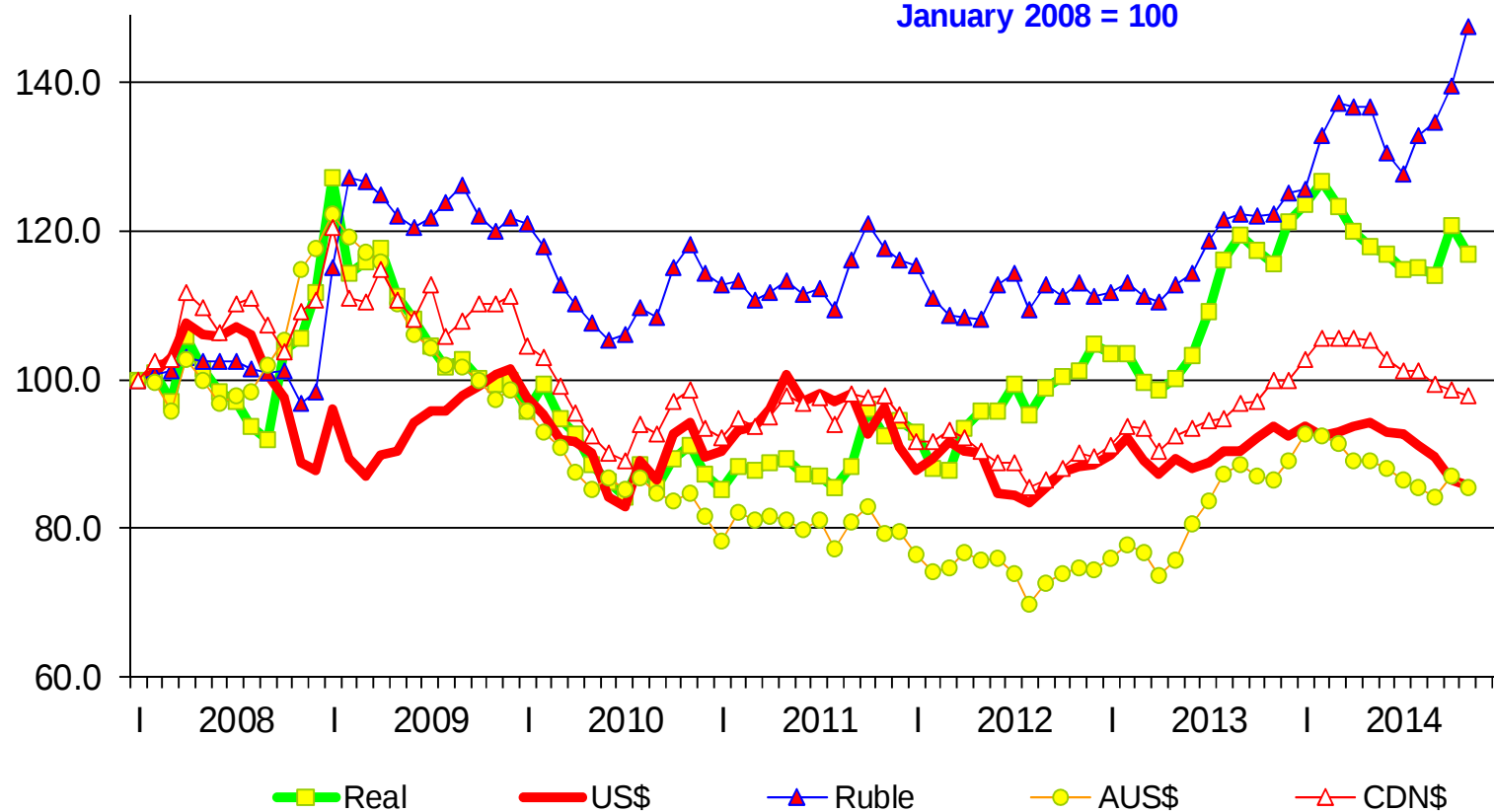
Trade balance of beef and live animals



20 November 2014

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

notification on the 1st of the month
January 2008 = 100



20 November 2014

WORLD BEEF MARKET



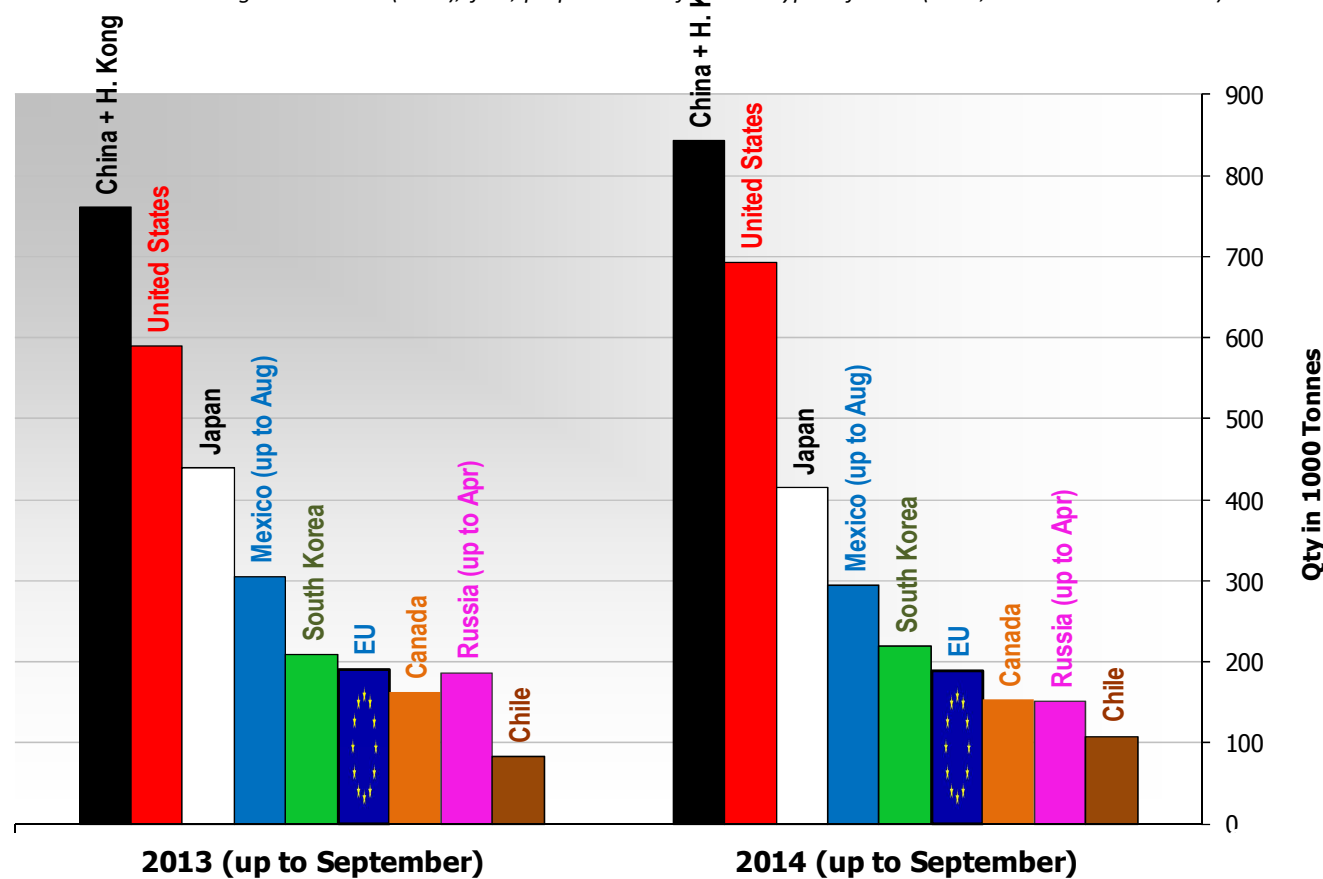
E.U. IMPORTS BEEF MAIN IMPORTERS

Source : GTA

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

Main Importers of BEEF Products (up to September)

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



20 November 2014

WORLD BEEF MARKET

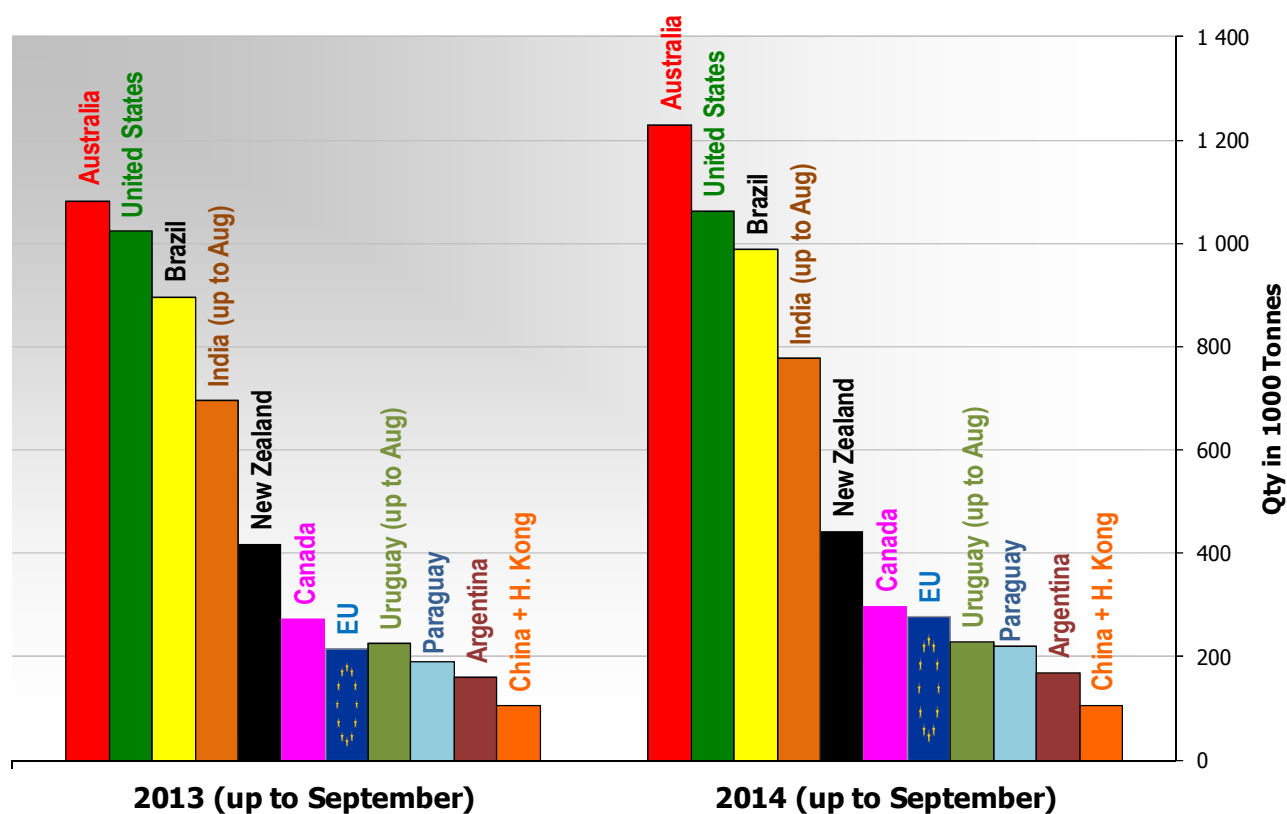


E.U. EXPORTS BEEF MAIN EXPORTERS

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 September)

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



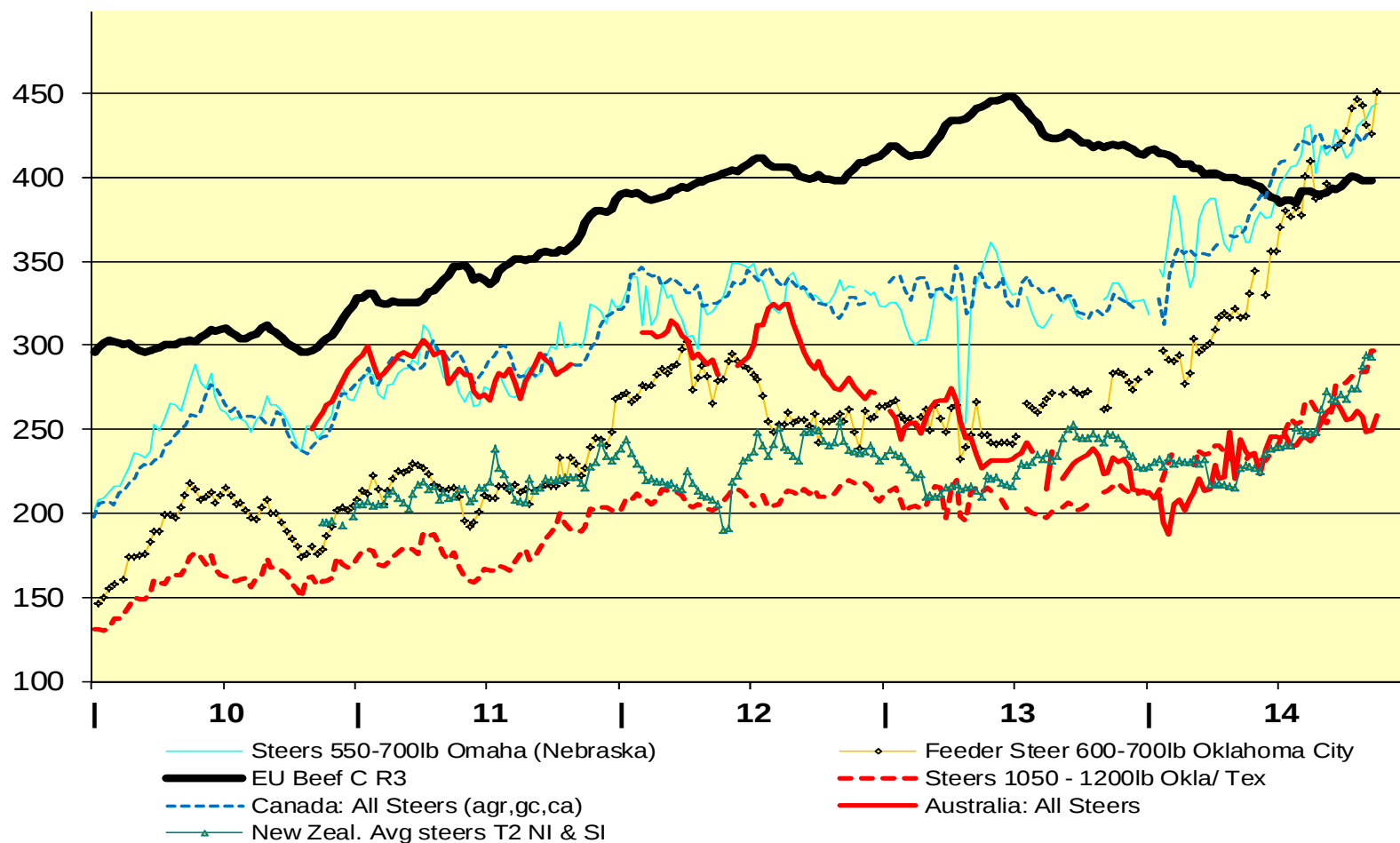
20 November 2014

WORLD BEEF MARKET



STEER PRICES US & EU

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



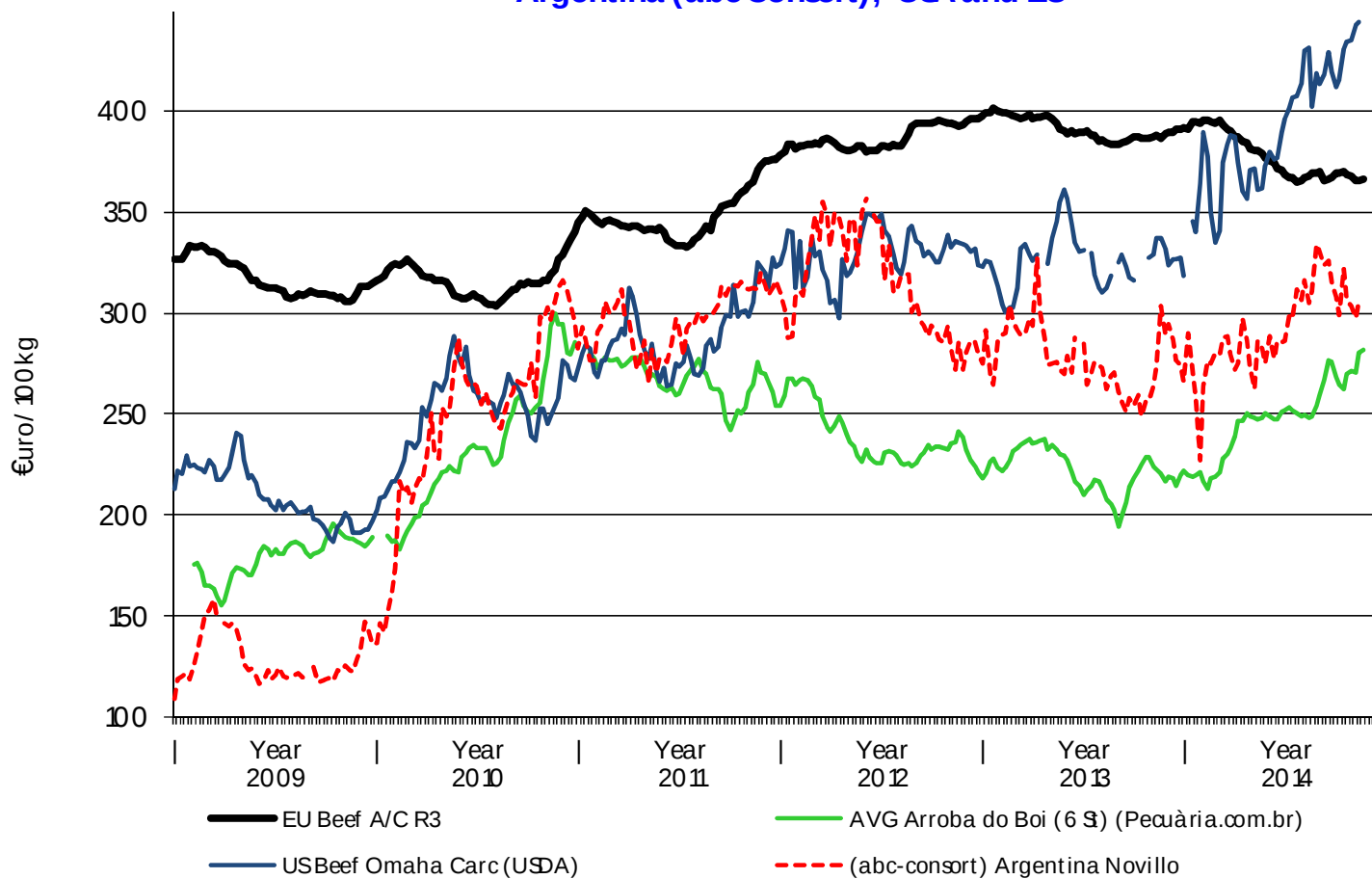
20 November 2014

WORLD BEEF MARKET



ADULT MALE BOVINE PRICES Brazil Argentina Uruguay EU

Market prices for Adult Male Bovine in Brazil (Pecuaria.com.br),
Argentina (abc Consort), USA and EU



20 November 2014

High Quality Beef Import Quotas



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%	2.24	1.1%
09.4450	Argentina	30 000	24 336.10	81.1%	23 663.86	78.9%	8 461.80	28.2%
09.4451	Australia	7 150	6 441.07	90.1%	7 138.89	99.8%	3 458.92	48.4%
09.4452	Uruguay	6 300	6 289.20	99.8%	6 278.75	99.7%	2 105.22	33.4%
09.4453	Brazil	10 000	2 977.93	29.8%	4 078.92	40.8%	3 281.65	32.8%
09.4454	New Zealand	1 300	1 281.13	98.5%	1 299.61	100.0%	379.47	29.2%
09.4002	Canada/US	11 500	432.44	3.8%	431.80	3.8%	212.96	1.9%
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%	17 900.02	26.6%
Total Buffalo		2 450	33.57	1.4%	15.71	0.6%	2.24	0.1%
Total		69 700	41 791.44	60.0%	42 907.54	61.6%	17 902.26	25.7%

* up to 31/10/2014

20 November 2014

High Quality Beef Import Quotas



Quota erga omnes

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*	11 811 589	6 350 248	-	-	18 161 836
Available	12 050 000	12 050 000	12 050 000	12 050 000	48 200 000
Use	98.0%	52.7%	0.0%	0.0%	37.7%

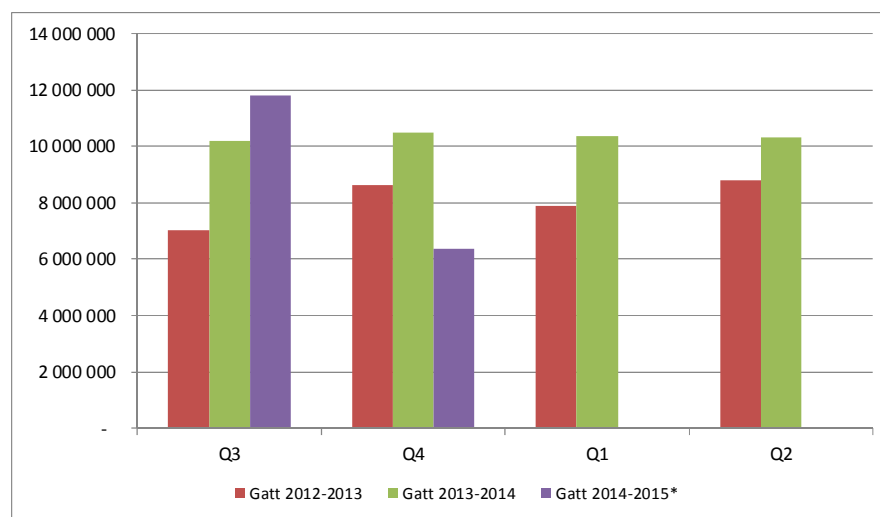
* Until 14/11/2014

Q3

Q4

Q1

Q2



20 November 2014

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Forecast Summary



	2012	2013	2014	2015
EU.15 PRODUCTION (1000T)	- 4.06% 6 923	- 3.87% 6 655	+ 3.53% 6 890	- 0.71% 6 841
EU.15 CONSUMPTION (1000T)	- 1.82% 7 263	- 2.39% 7 089	- 0.43% 7 059	- 0.66% 7 012
BALANCE	- 340	- 434	- 169	- 171

EU - CARCASS PRICES	2012	2013	2014	2015
ADULT MALE BOVINES (€/100 kg)	+ 10.8% 387.6	+ 2.13% 395.8	- 4.04% 379.8	+ 0.53% 381.9
COWS (€/100 kg)	+ 15.8% 311.6	+ 0.63% 313.6	- 6.59% 292.9	- 3.24% 283.4

Sources : EStat New Cronos, Member States

20 November 2014

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