

BEEF & VEAL MARKET SITUATION

22 May 2025

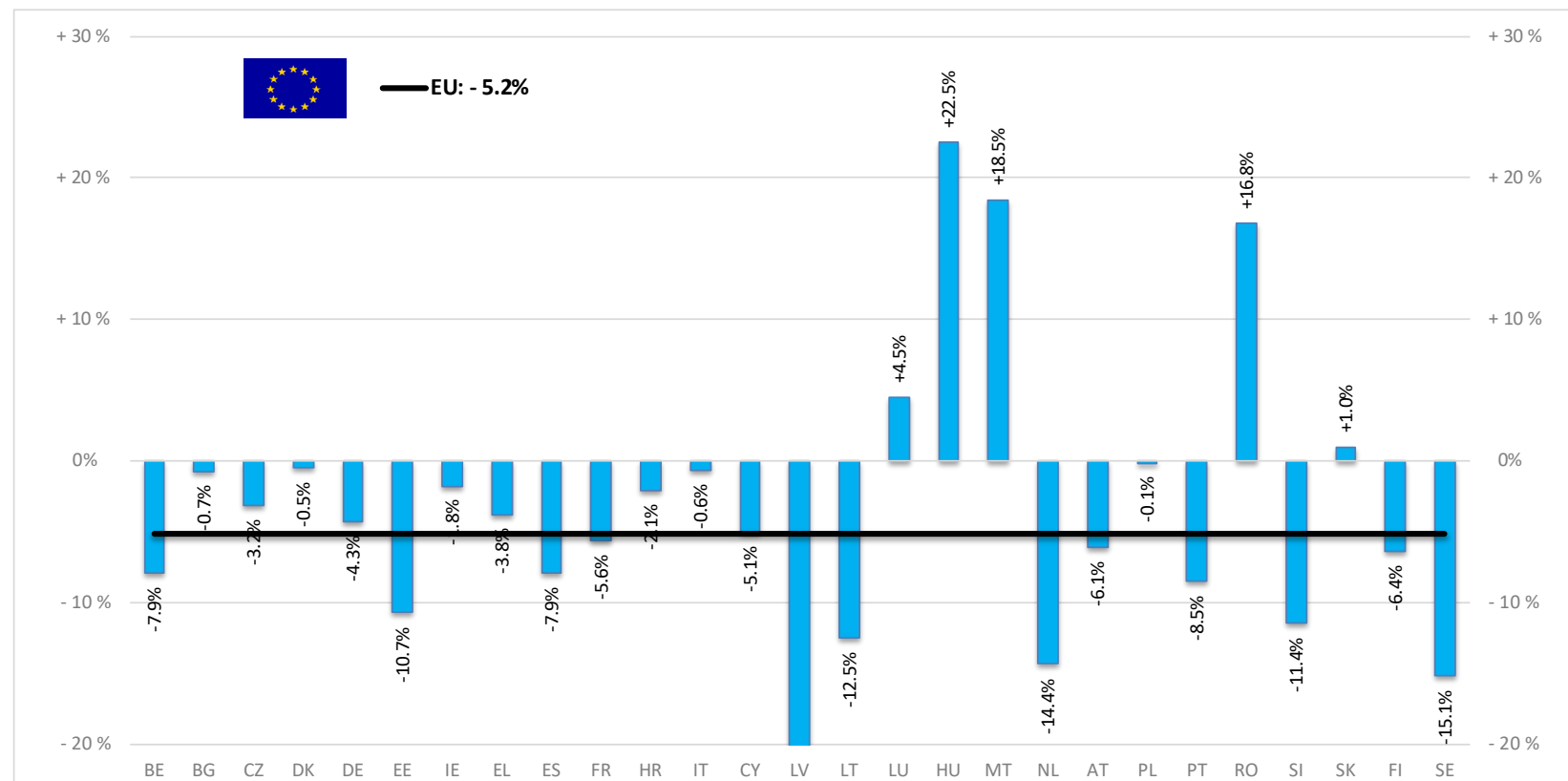


PRODUCTION

% EVOLUTION HEADS

HEADS	Jan-Feb 25/24
	EU
Bull	-2.4%
Bullock	-0.8%
Cow	-5.5%
Heifer	-2.9%
Calf	+4.0%
Young cattle	-51.3%
Bovine meat	-5.2%

Estimates for last month of period : IT



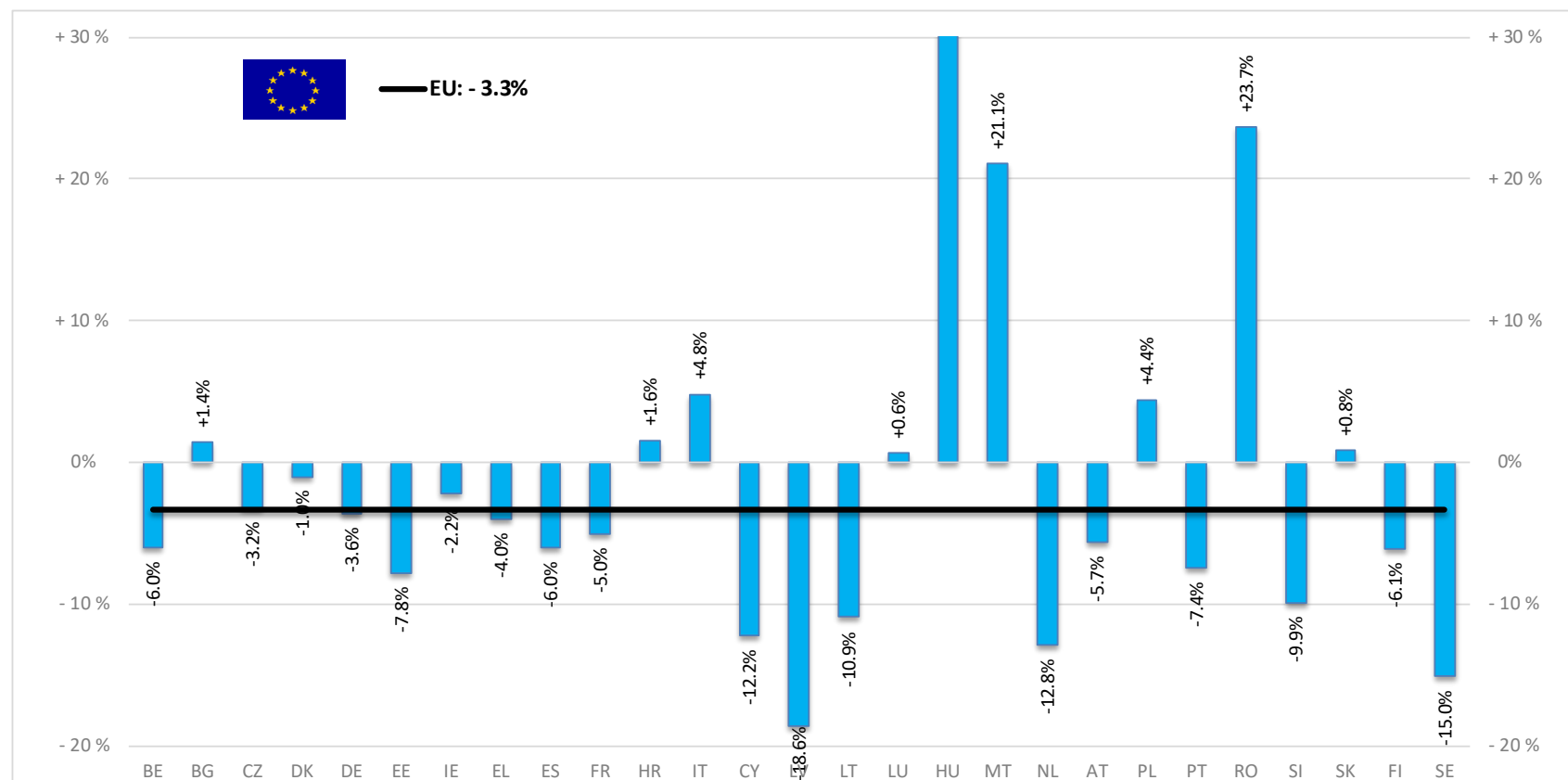
Source : Eurostat - Slaughtering in slaughterhouses - monthly data (apro_mt_pwgtn)

PRODUCTION

% EVOLUTION TONNES

TONS	Jan-Feb 25/24
	EU
Bull	-1.4%
Bullock	-1.7%
Cow	-4.2%
Heifer	-1.3%
Calf	+15.4%
Young cattle	-56.4%
Bovine meat	-3.3%

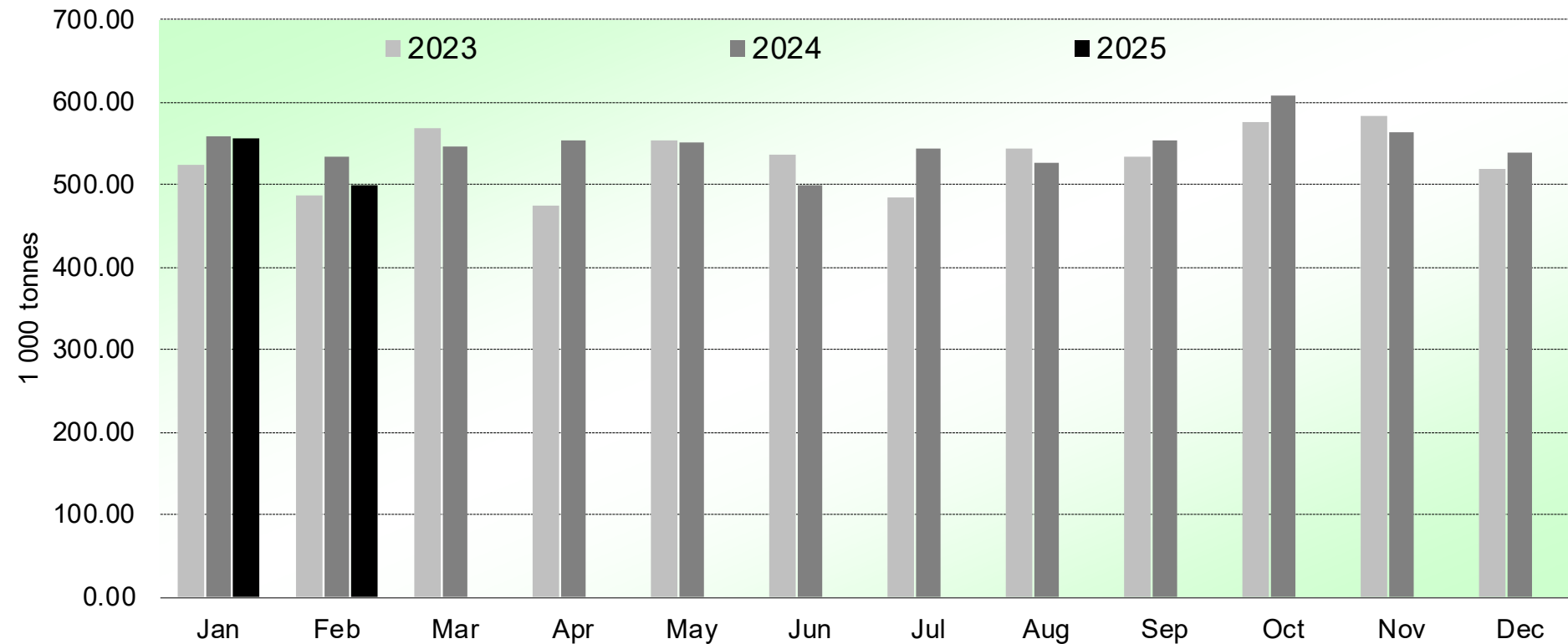
Estimates for last month of period : IT



PRODUCTION

HISTORIC
TONNES

Beef & Veal Production (EU Slaughtering) - Tonnes



PRICES CARCASSES

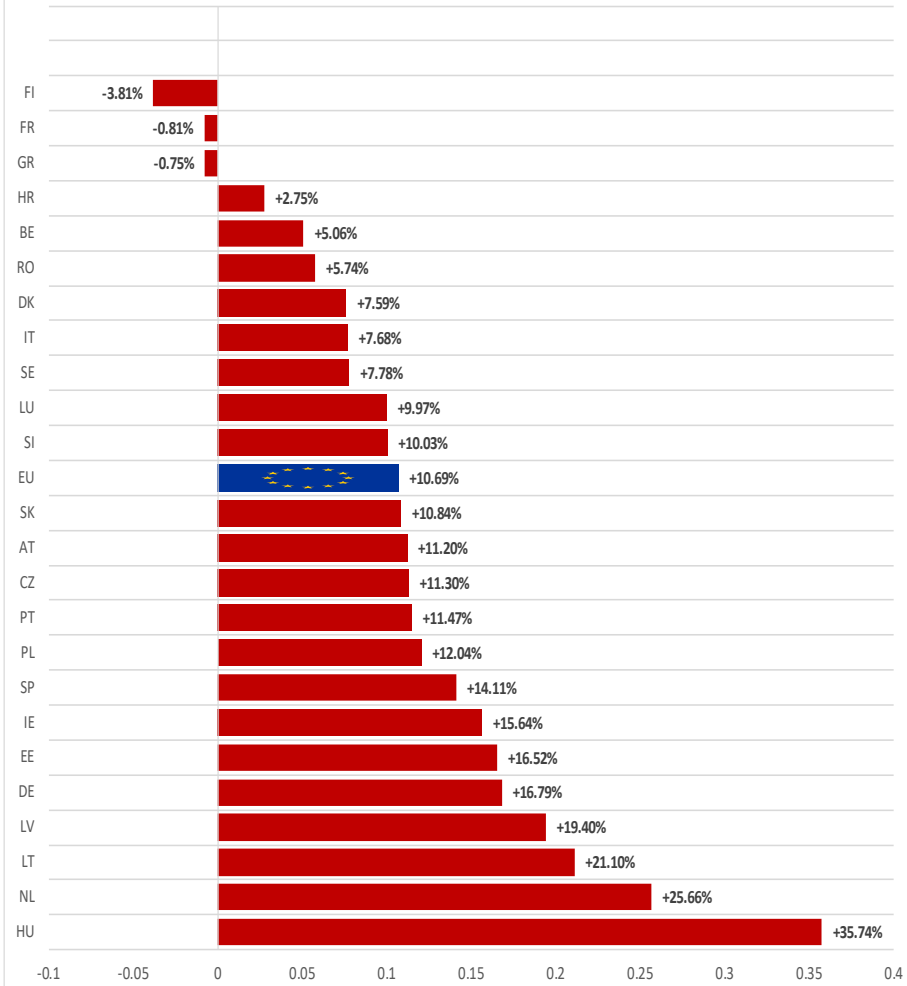
Dashboard

EU Prices week		19	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	645.1	€/100 kg	+ 0.7%	+ 2.0%	+ 28.3%
	Young Bovines (Z)	592.5		+ 0.3%	+ 0.2%	+ 16.7%
	Young Bulls (A)	639.6		+ 0.8%	+ 3.3%	+ 28.9%
	Steers (C)	755.1		+ 0.7%	- 1.6%	+ 42.0%
	Cows (D)	576.6		+ 1.0%	+ 4.5%	+ 37.2%
	Heifers (E)	652.2		+ 0.6%	+ 2.2%	+ 27.1%
	Calves slaughtered <8M	745.1		- 1.0%	- 3.8%	+ 21.5%
Live Animals	Male Calves Dairy Type	245.3	€/head	+ 1.6%	+ 6.2%	+ 82.1%
	Male Calves Beef Type	401.7		+ 2.2%	+ 6.2%	+ 51.8%
	Young Store Cattle	4.69	€/kg	+ 1.6%	+ 2.2%	+ 36.2%
	Yearling Male Store Cattle	6.11		+ 1.3%	+ 5.6%	+ 53.8%
	Yearling Female Store Cattle	4.43		+ 1.8%	+ 4.1%	+ 46.1%

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

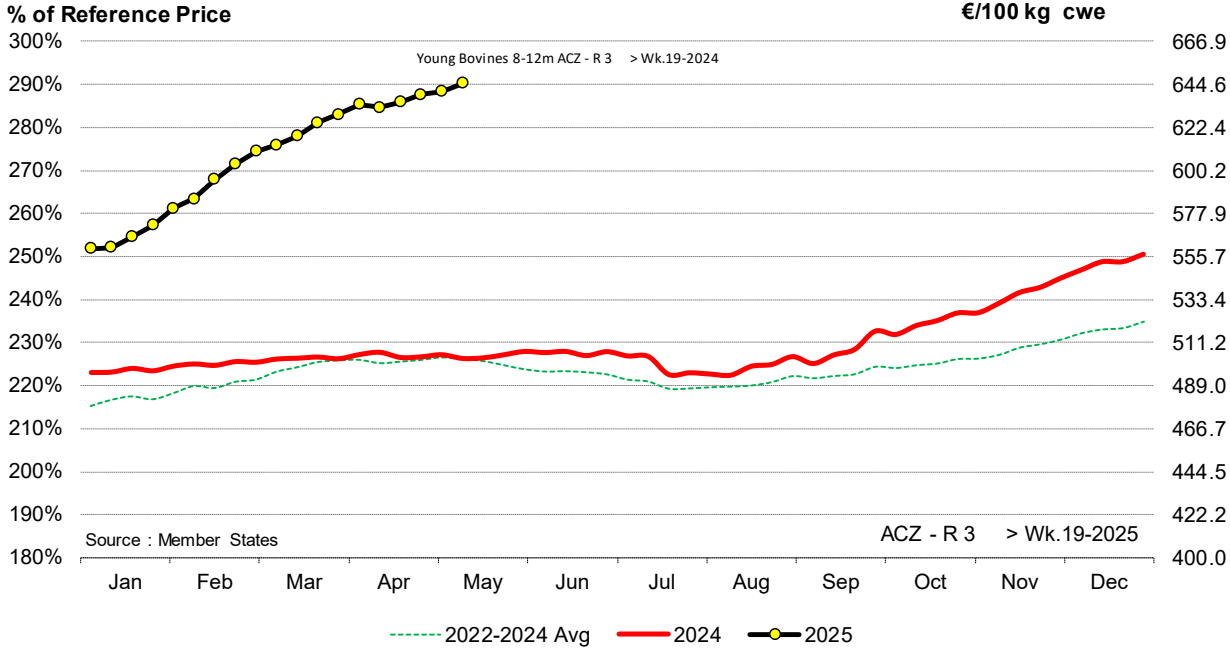
PRICES CARCASSES

EU ACZ R3 Price Comparison between average monthly price May 2024 - April 2025 compared to May 2023 - April 2024



EU EVOLUTION A/C/Z.R3

ACZ - R 3 > Wk.19-2025

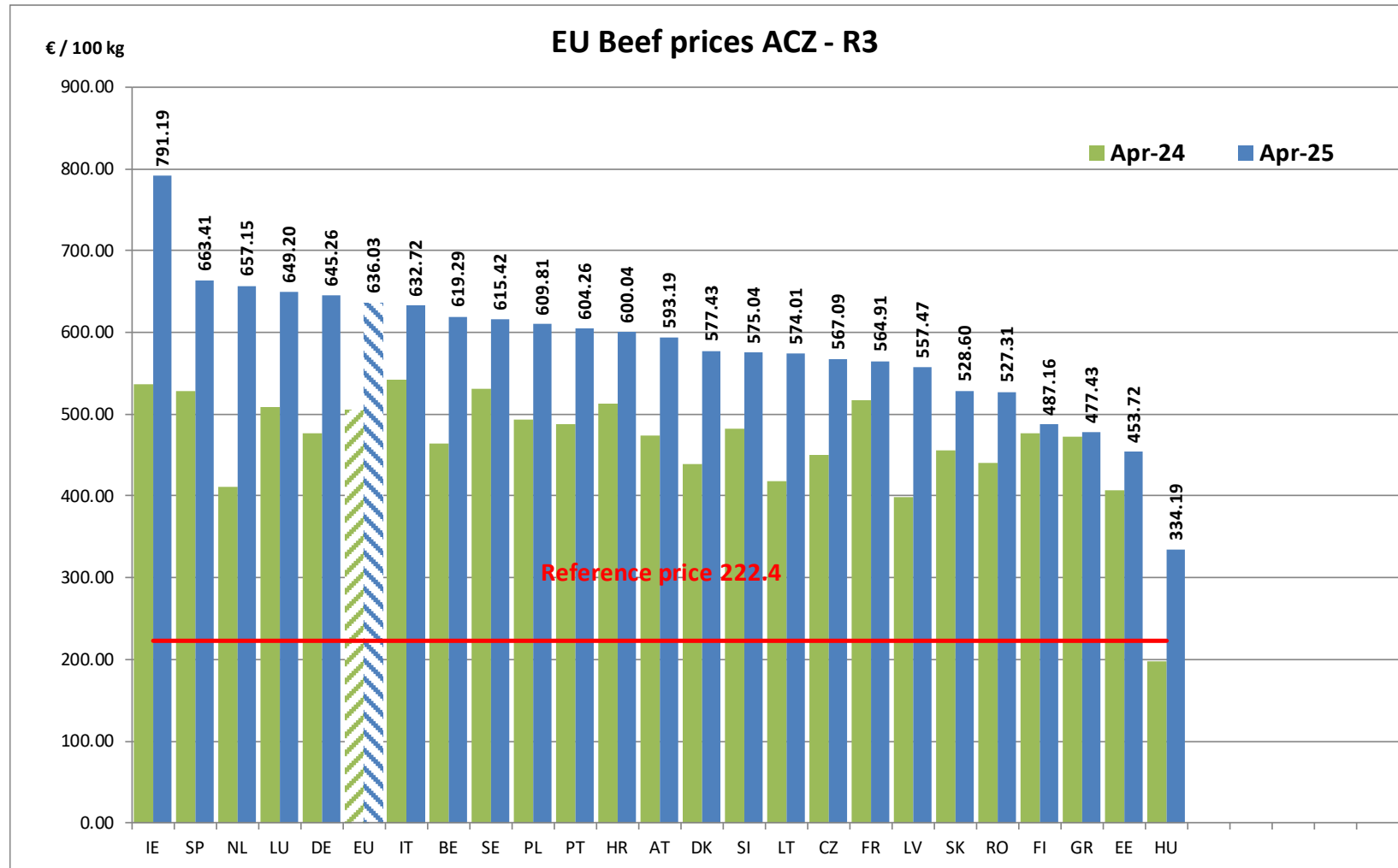


Price in week 19 : **645.14**
% change y/y : **+ 28.31%**
% Ref. Price in wk 19 : **290.1%**

Average price in April 2025 : **636.00**
% change y/y : **+ 26.07%**

PRICES CARCASSES

EU EVOLUTION
A/C/Z.R3

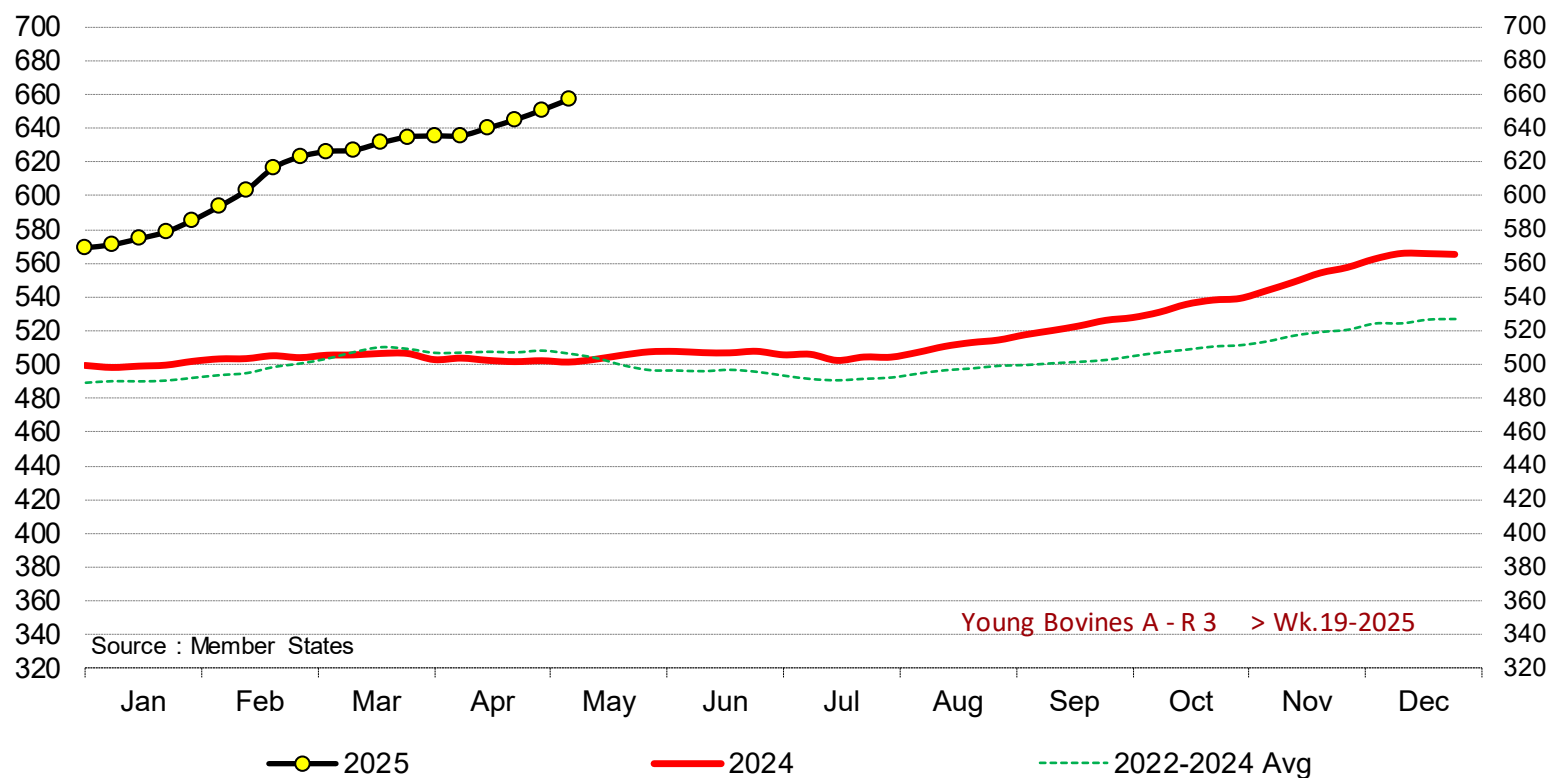


22 May 2025

PRICES CARCASSES

EU EVOLUTION YOUNG BULL – A.R3

Young Bovines A - R 3 > Wk.19-2025



Price in week 19 : **657.07**
% change y/y : **+ 31.0%**

Average price in April 2025 : **640.38**
% change y/y : **+ 27.4%**

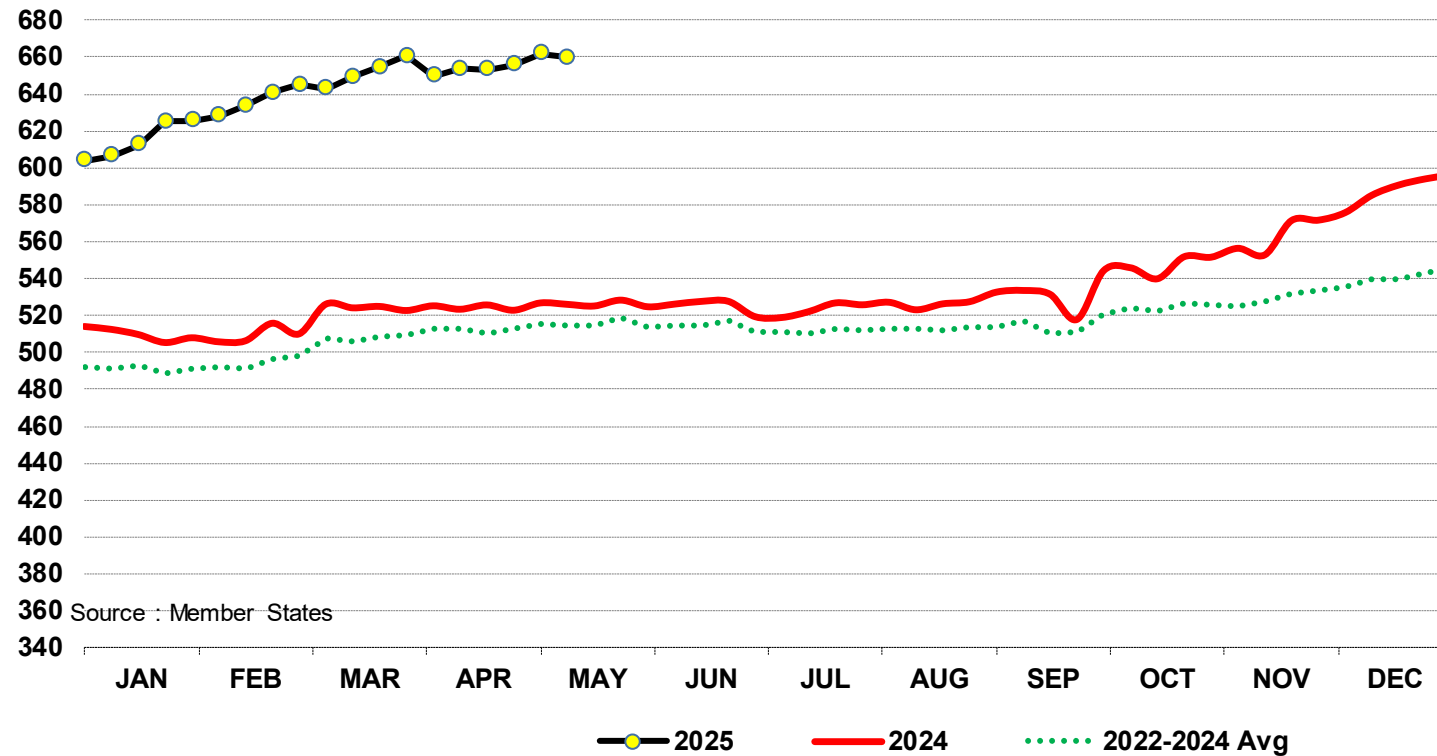
22 May 2025

PRICES CARCASSES

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

In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.19-2024



Price in week 19 : **659.55**

10/04/2025

Average price in April 2025 : **654.16**

% change y/y : **+ 25.3%**

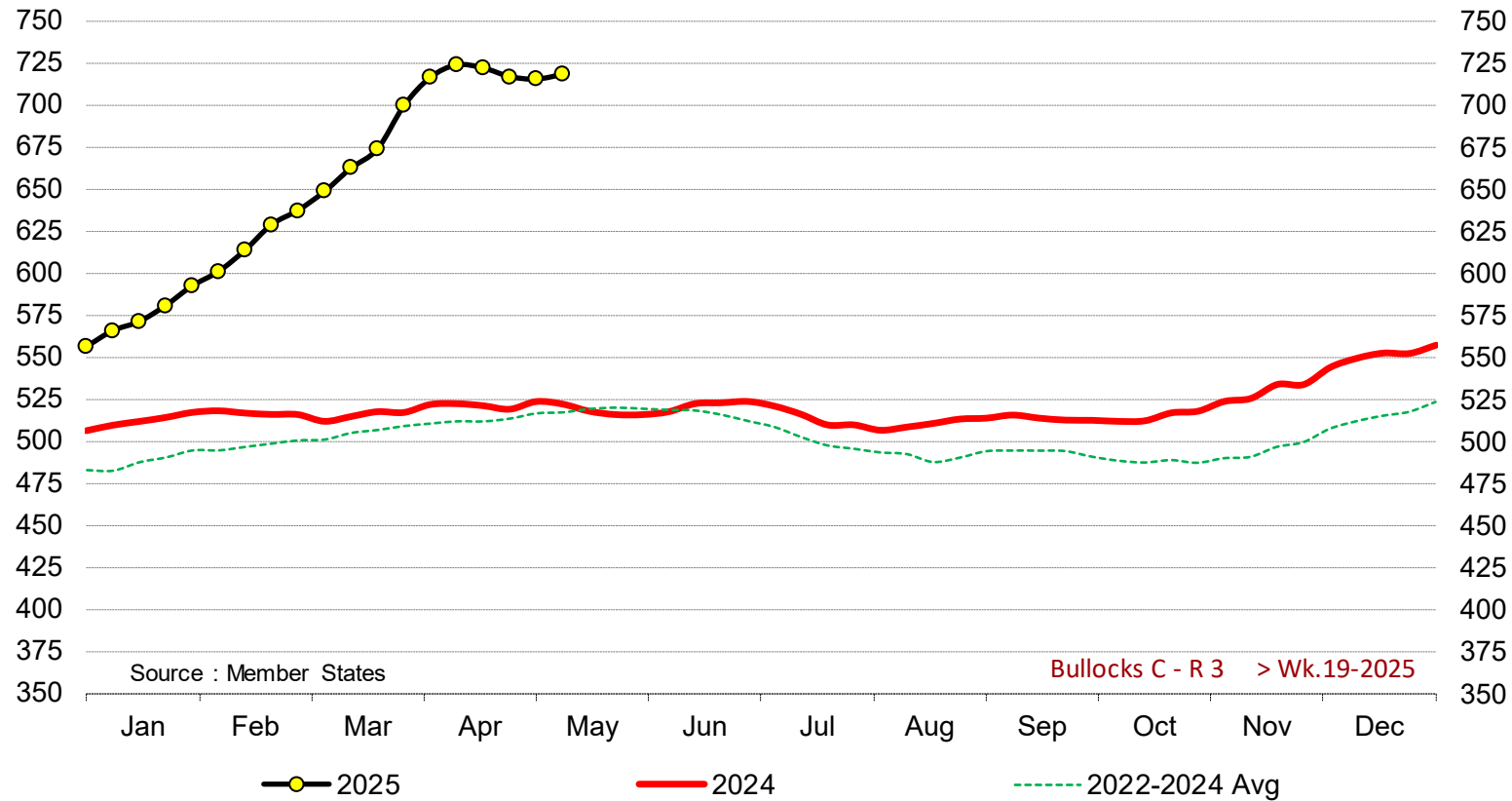
% change y/y : **+ 24.7%**

22 May 2025

PRICES CARCASSES

E.U. EVOLUTION STEER – C.R3

Bullocks C - R 3 > Wk.19-2025



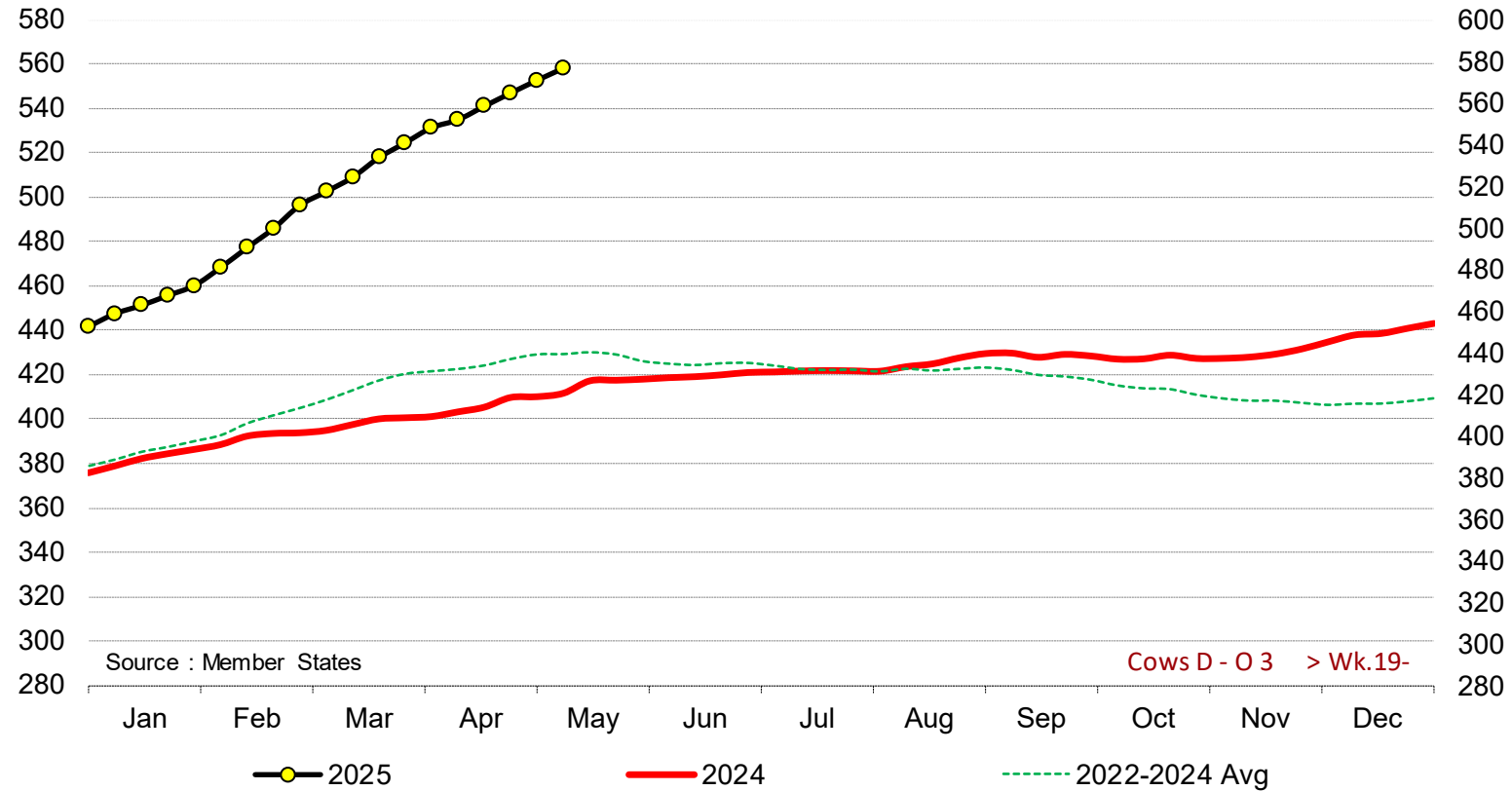
Price in week 19 : **718.04**
% change y/y : **+ 37.6%**

Average price in April 2025 : **719.26**
% change y/y : **+ 38.0%**

PRICES CARCASSES

E.U. EVOLUTION
COW – D.O3

Cows D - O 3 > Wk.19-2025



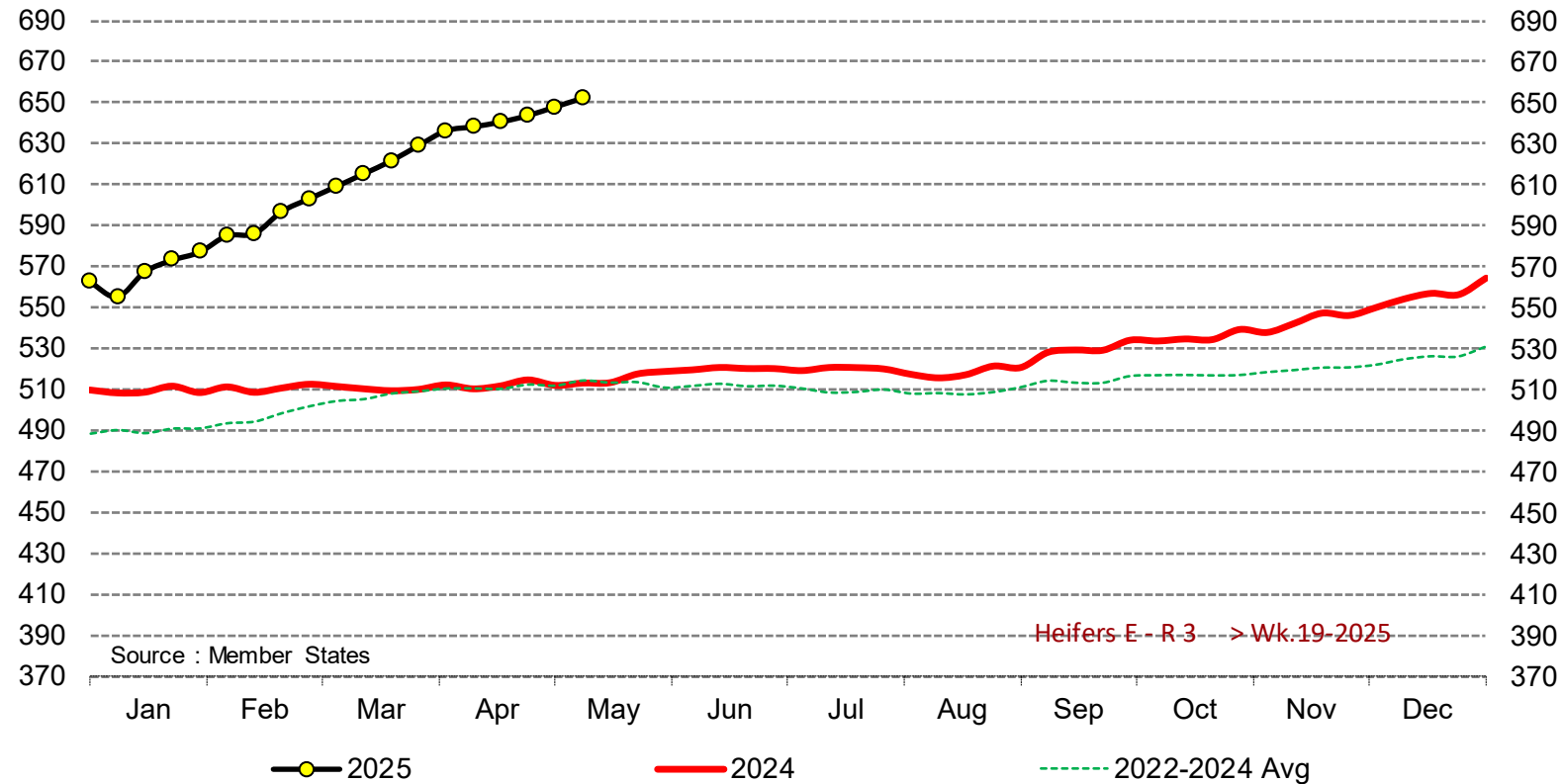
Price in week 19 : **576.62**
% change y/y : **+ 37.2%**

Average price in April 2025 : **557.51**
% change y/y : **+ 34.8%**

PRICES CARCASSES

EU EVOLUTION HEIFER – E.R3

Heifers E - R 3 > Wk.19-2025

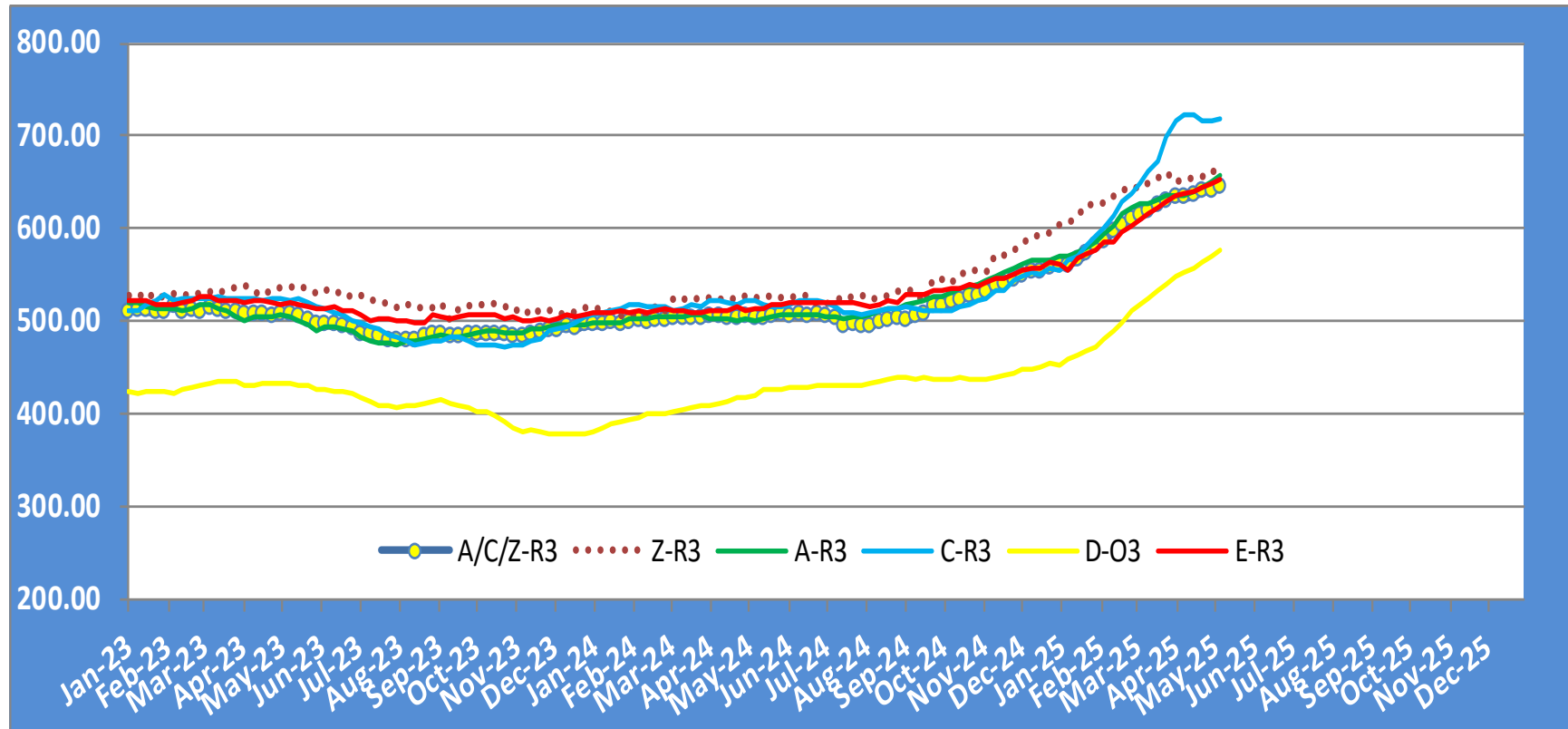


Price in week 19 : **652.20**
% change y/y : **+ 27.1%**

Average price in April 2025 : **640.64**
% change y/y : **+ 25.0%**

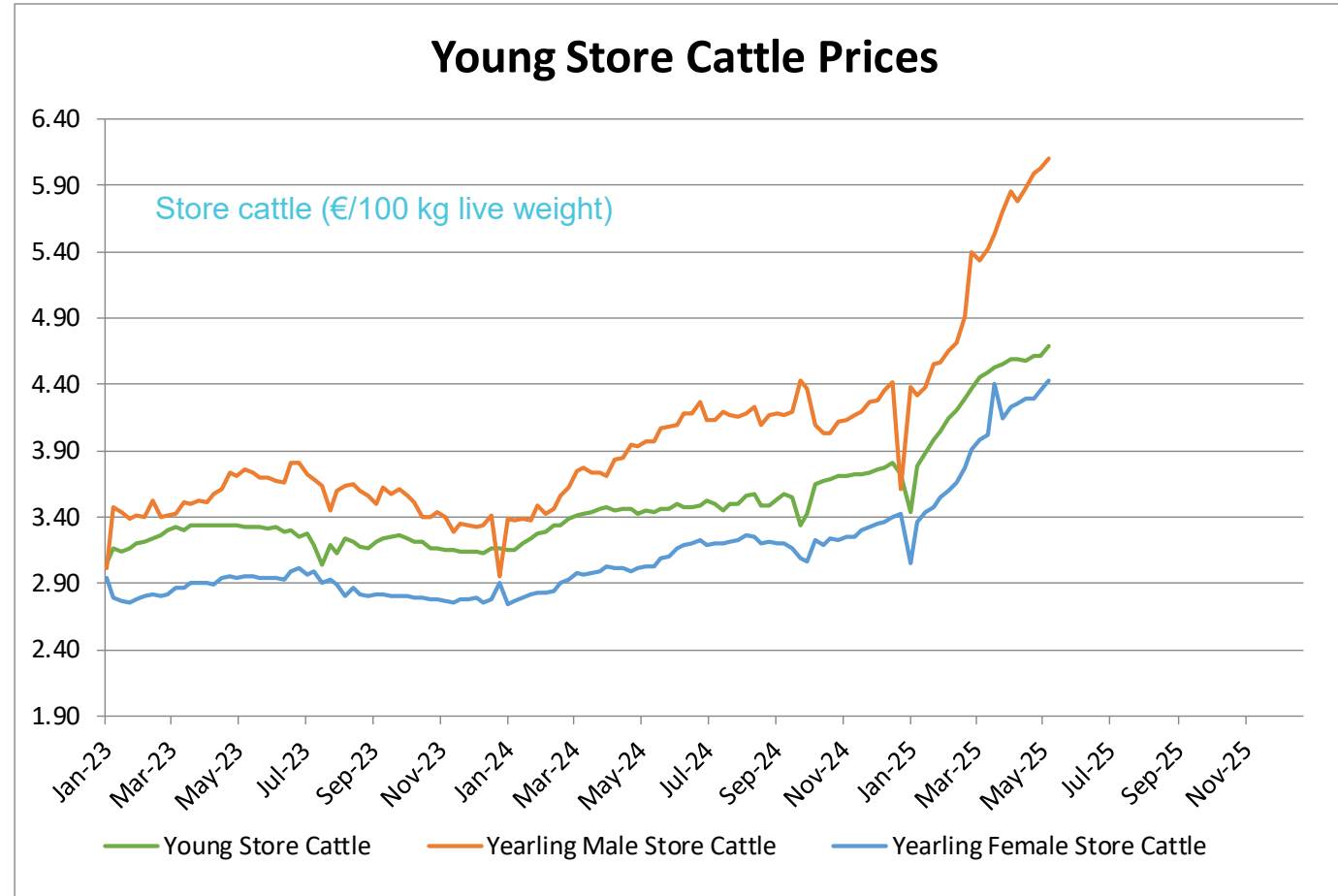
PRICES CARCASSES

EU EVOLUTION
All CAT GLOBAL VIEW



PRICES LIVE BOVINES

EU EVOLUTION STORE CATTLE



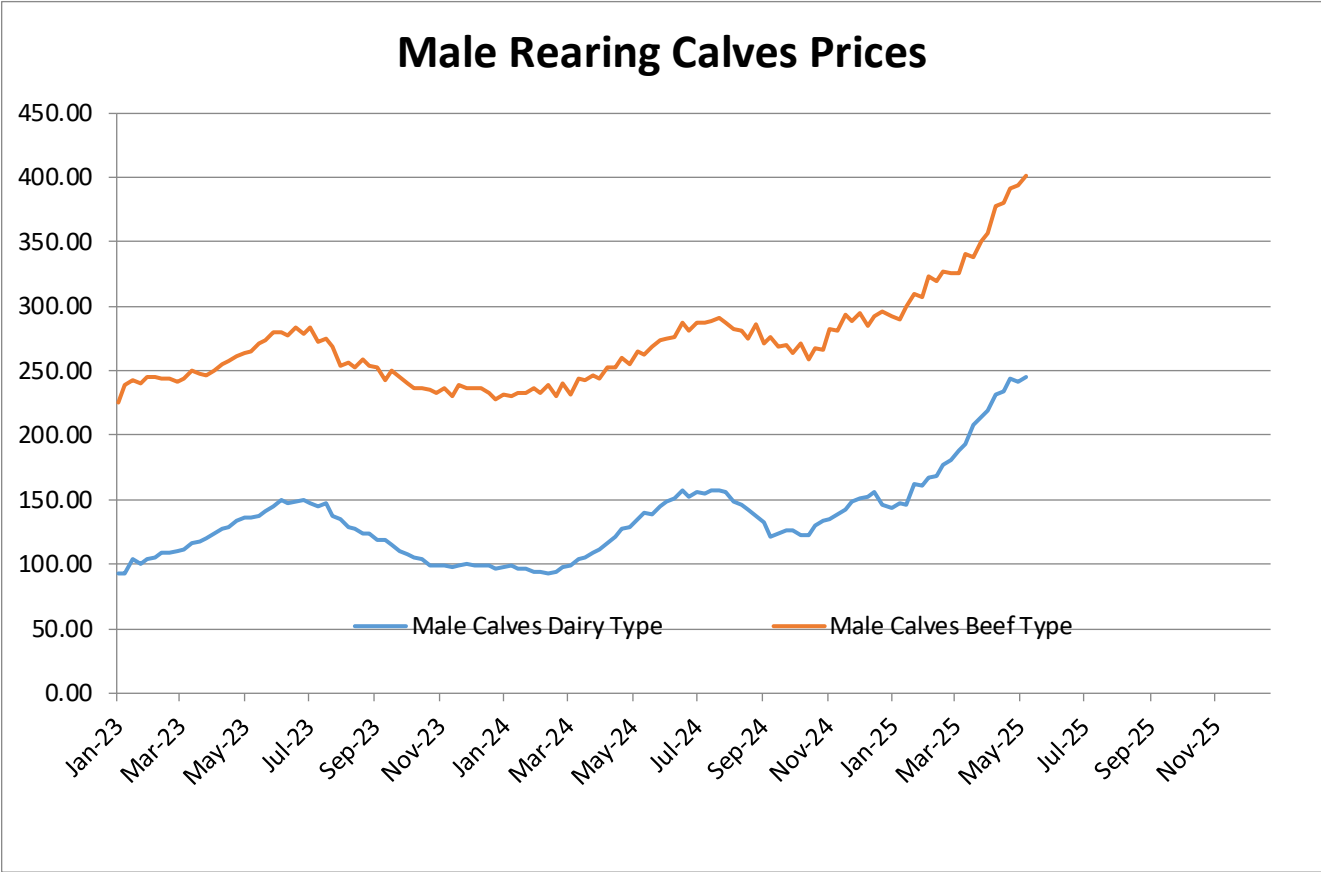
Young Store Cattle Price in	Week 19	4.69	Yearling Male Store Cattle Price	6.11
	Change y/y	+36.2%	Change y/y	+53.8%
Yearling Female Store Cattle Price		4.43		
	Change y/y	+46.1%		

22 May 2025

PRICES LIVE BOVINES

EU EVOLUTION Male Calves – 8D4W

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



Male Rearing Calves Beef type

Price in Week 19 **401.78**
Change y/y +51.8%

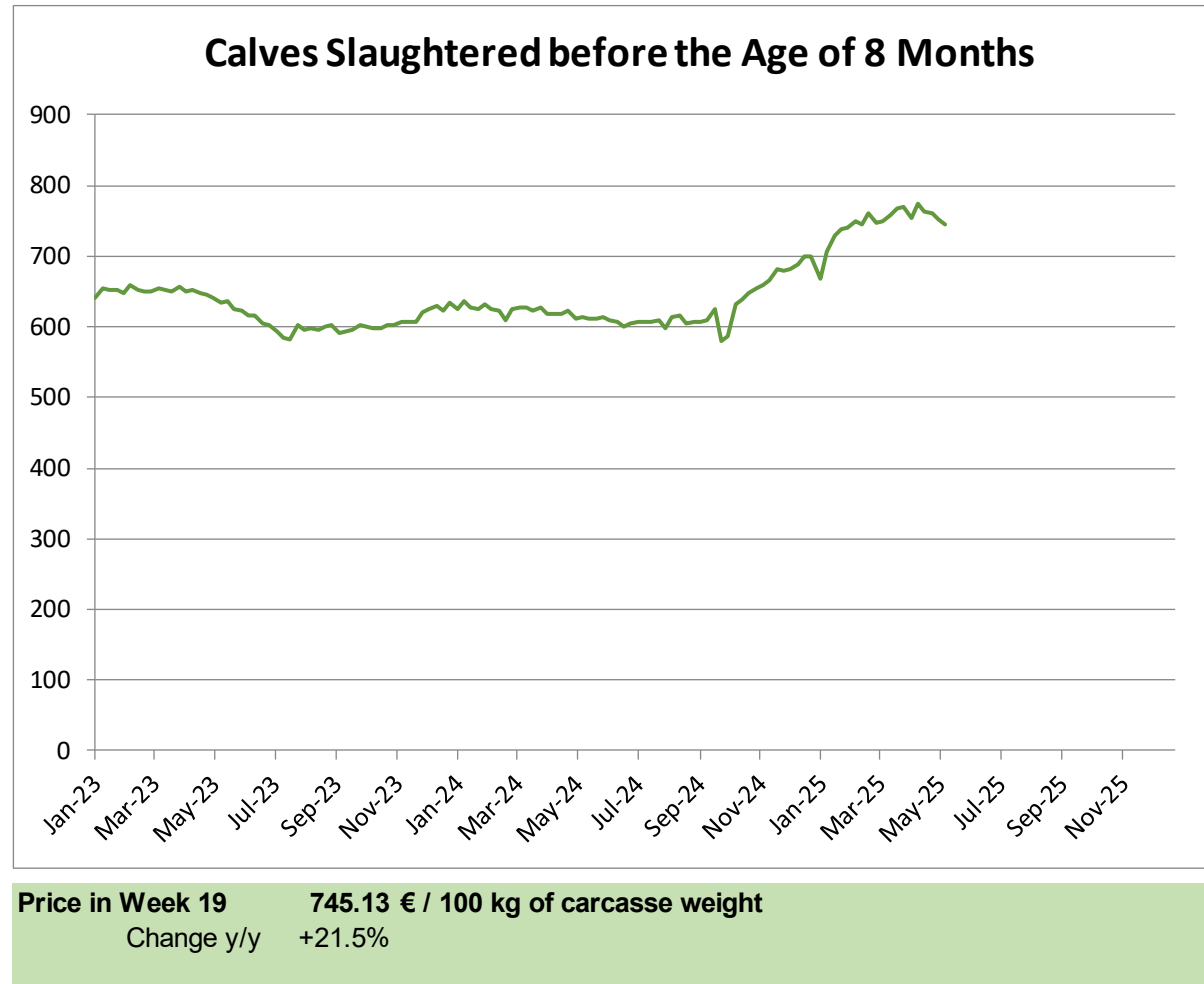
Male Rearing Calves Dairy type

Price in Week 19 **245.30**
Change y/y +82.1%

PRICES LIVE BOVINES

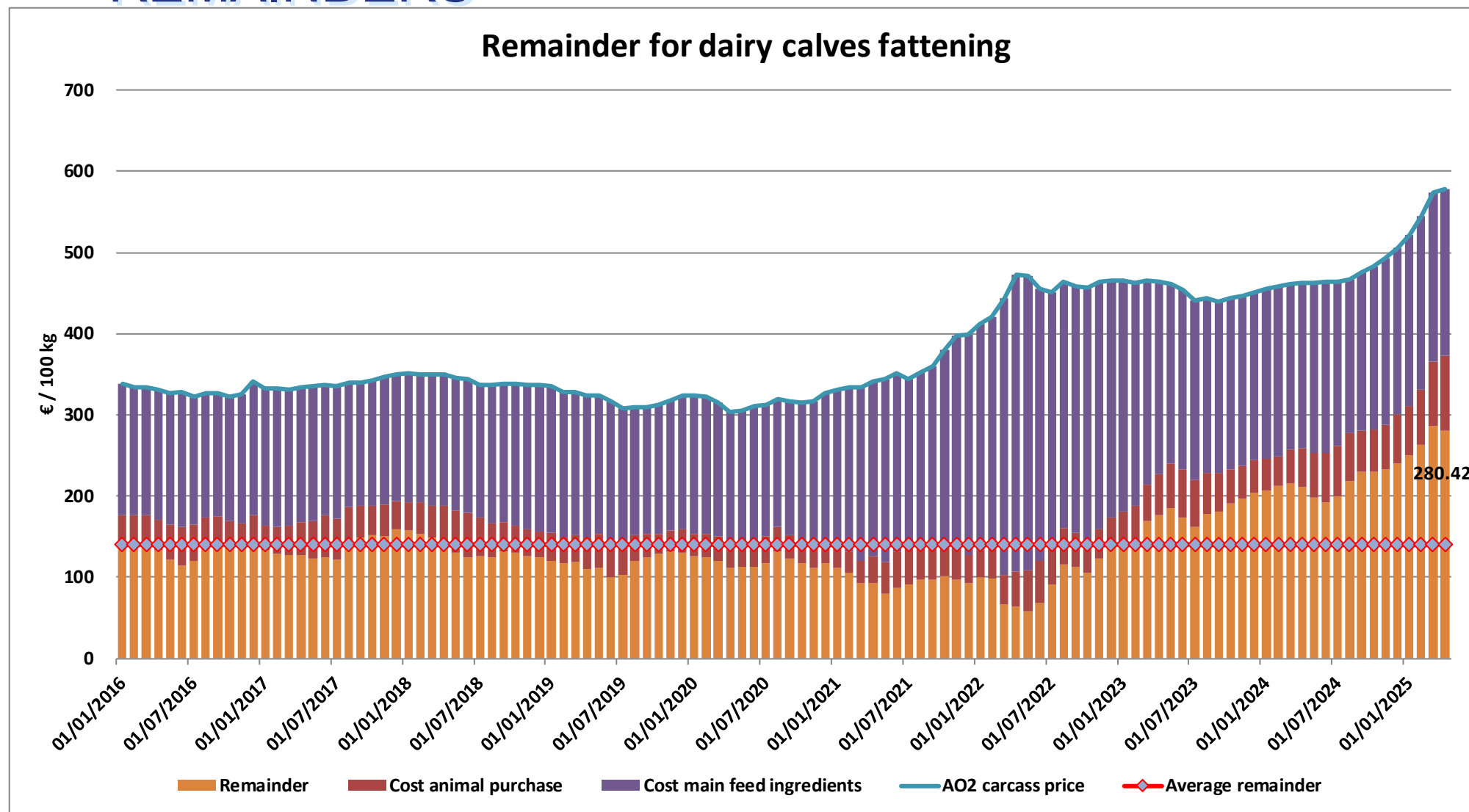
EU EVOLUTION Butcher Calves

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

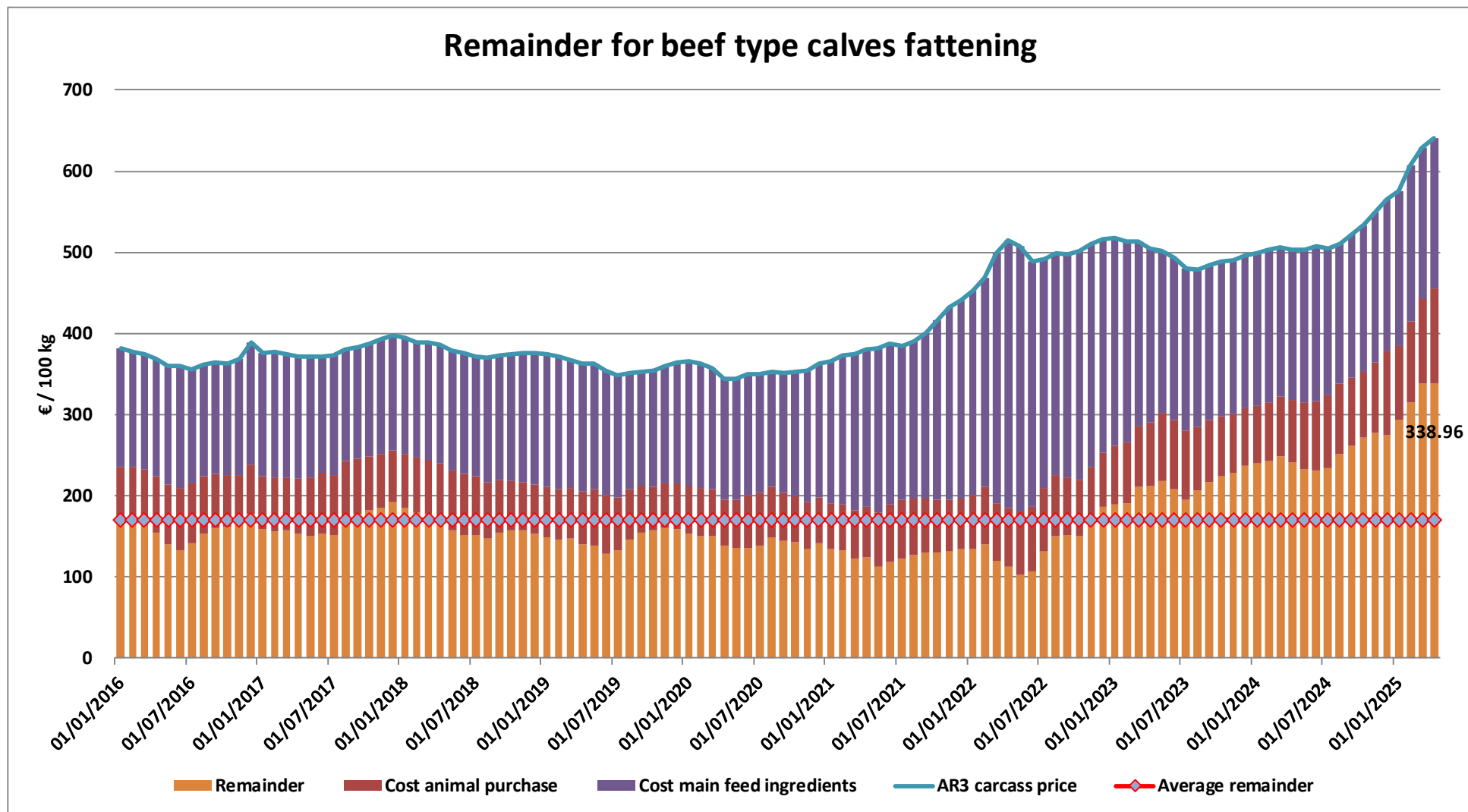


22 May 2025

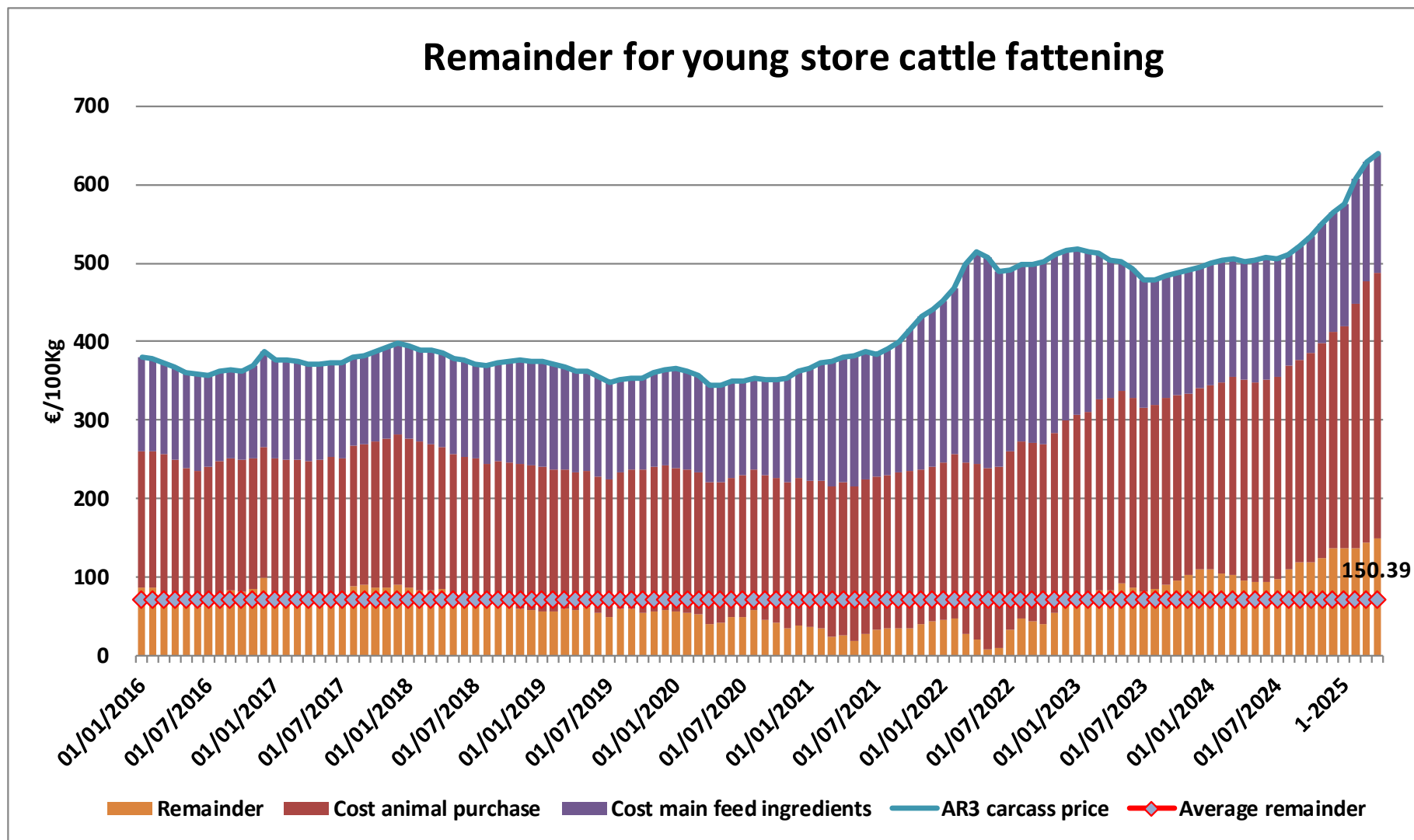
REMAINDERS



REMAINDERS



REMAINDERS



TRADE

EU EXPORTS

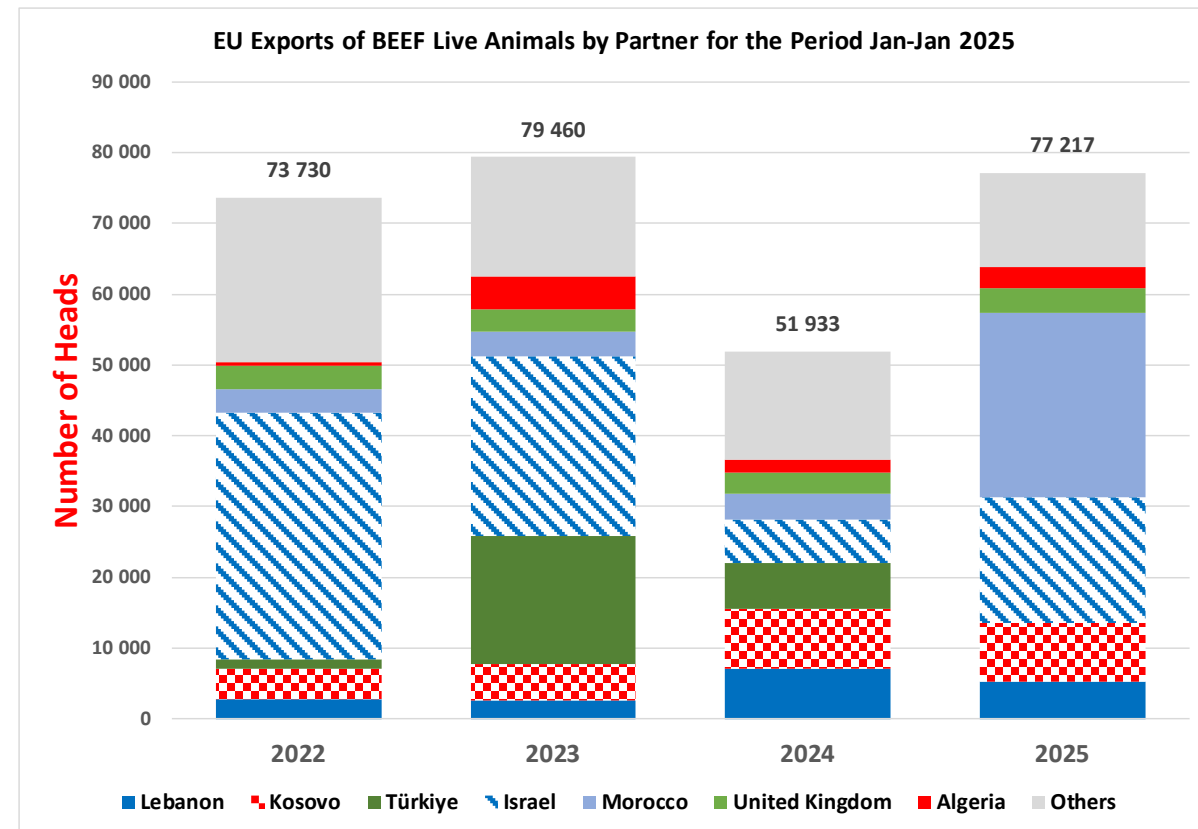
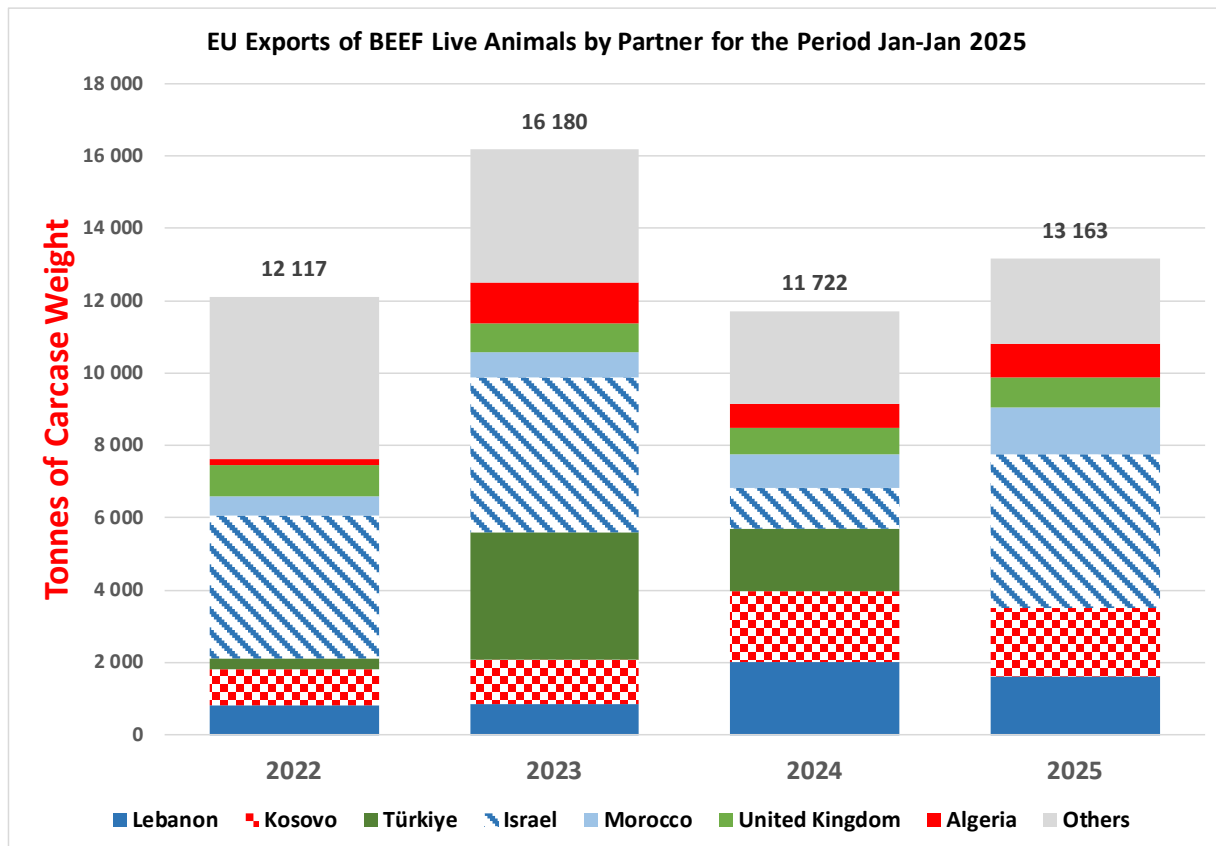
Beef & Live Animals

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

Destinations	2021		2022		2023		2024		Jan 25		Compared to Jan 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	344 633	33.4%	366 345	38.9%	368 961	38.4%	349 137	35.6%	26 180	35.9%	- 14.6%
Türkiye	14 953	1.5%	14 168	1.5%	90 933	9.5%	104 640	10.7%	5 415	7.4%	- 19.7%
Israel	66 022	6.4%	63 618	6.7%	45 133	4.7%	37 939	3.9%	5 085	7.0%	+ 127.2%
Algeria	24 111	2.3%	25 459	2.7%	11 905	1.2%	30 953	3.2%	4 296	5.9%	+++
Ghana	47 618	4.6%	32 171	3.4%	33 889	3.5%	35 124	3.6%	2 664	3.7%	- 7.7%
Ivory Coast	29 187	2.8%	29 882	3.2%	30 205	3.1%	28 129	2.9%	2 621	3.6%	+ 13.9%
Bosnia-Herz.	40 504	3.9%	38 796	4.1%	45 285	4.7%	41 926	4.3%	2 609	3.6%	- 7.1%
Switzerland	28 717	2.8%	24 958	2.6%	19 371	2.0%	23 612	2.4%	2 259	3.1%	+ 87.8%
Morocco	11 868	1.2%	8 273	0.9%	25 612	2.7%	33 796	3.4%	2 116	2.9%	+ 88.4%
Kosovo	16 478	1.6%	17 069	1.8%	22 694	2.4%	26 662	2.7%	2 016	2.8%	- 1.1%
Lebanon	19 527	1.9%	21 026	2.2%	21 627	2.2%	16 768	1.7%	1 655	2.3%	- 20.2%
Canada	20 670	2.0%	19 928	2.1%	15 907	1.7%	17 592	1.8%	1 472	2.0%	+ 31.6%
Philippines	34 671	3.4%	29 922	3.2%	18 333	1.9%	21 664	2.2%	1 132	1.6%	- 36.3%
Angola	7 600	0.7%	8 070	0.9%	8 417	0.9%	10 367	1.1%	908	1.2%	- 14.4%
Hong Kong	44 769	4.3%	10 570	1.1%	21 689	2.3%	17 357	1.8%	890	1.2%	- 48.6%
South Africa	1 731	0.2%	8 023	0.9%	2 491	0.3%	8 287	0.8%	748	1.0%	+ 20.0%
Other Destinations	277 918	27.0%	224 230	23.8%	178 779	18.6%	175 781	17.9%	10 923	15.0%	
Total	1 030 978		942 510		961 230		979 733		72 989		
% change			- 9%		+ 2%		+ 2%		- 2.6%		

TRADE

EU EXPORTS Live Animals



TRADE

EU IMPORTS Beef & Live Animals

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

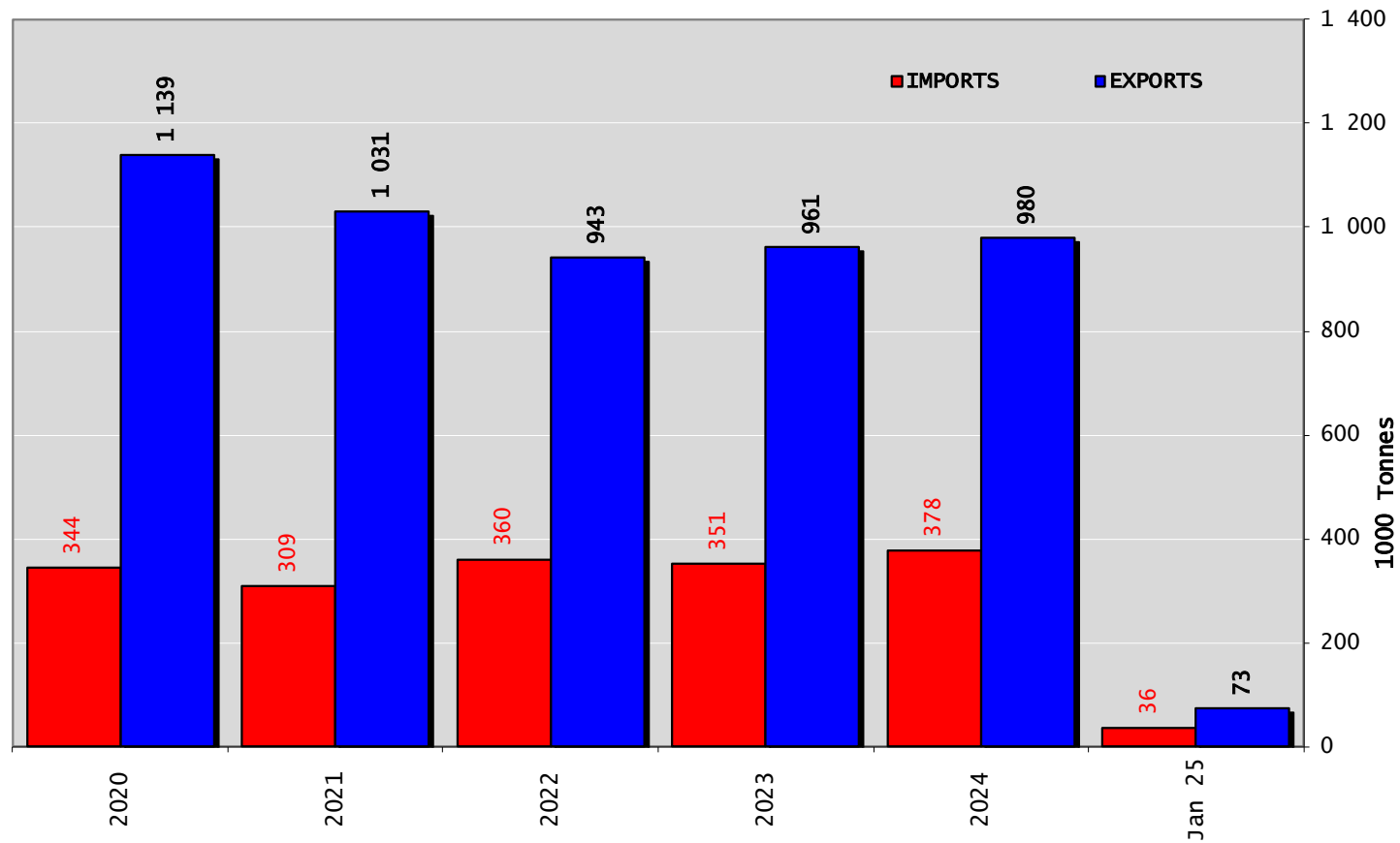
Origins	2021		2022		2023		2024		Jan 25		Compared to Jan 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Argentina	52 300	16.9%	62 584	17.4%	63 094	18.0%	68 748	18.2%	8 630	23.8%	+ 37.6%
United Kingdom	87 596	28.3%	118 759	33.0%	107 130	30.5%	110 627	29.2%	8 621	23.8%	- 5.6%
Brazil	81 737	26.4%	86 512	24.0%	86 934	24.7%	87 645	23.2%	7 474	20.6%	- 1.8%
Uruguay	42 669	13.8%	37 619	10.5%	41 544	11.8%	44 242	11.7%	5 936	16.4%	+ 9.2%
USA	14 910	4.8%	17 269	4.8%	18 275	5.2%	16 519	4.4%	1 417	3.9%	+ 0.2%
Australia	8 925	2.9%	8 385	2.3%	7 700	2.2%	8 287	2.2%	1 095	3.0%	+ 25.4%
Namibia	1 996	0.6%	5 168	1.4%	7 853	2.2%	15 364	4.1%	872	2.4%	+ 39.4%
New Zealand	4 380	1.4%	5 202	1.4%	4 532	1.3%	5 845	1.5%	512	1.4%	+ 48.4%
Botswana	331	0.1%	928	0.3%	1 606	0.5%	7 718	2.0%	463	1.3%	- 0.4%
Switzerland	4 714	1.5%	4 730	1.3%	3 627	1.0%	3 793	1.0%	457	1.3%	+ 33.2%
Paraguay	3 933	1.3%	5 404	1.5%	4 774	1.4%	5 303	1.4%	422	1.2%	- 29.0%
Canada	1 816	0.6%	2 172	0.6%	1 456	0.4%	1 103	0.3%	138	0.4%	+ 28.3%
Serbia	963	0.3%	1 058	0.3%	812	0.2%	637	0.2%	50	0.1%	+ 33.4%
Japan	1 478	0.5%	2 160	0.6%	834	0.2%	1 166	0.3%	50	0.1%	+ 1.0%
Chile	238	0.1%	378	0.1%	365	0.1%	346	0.1%	45	0.1%	+++
North Macedonia	61	0.0%	33	0.0%	29	0.0%	50	0.0%	34	0.1%	+++
Other Destinations	1 220	0.4%	1 633	0.5%	930	0.3%	967	0.3%	78	0.2%	
Total	309 267		359 994		351 496		378 358		36 296		
% change			+ 16%		- 2%		+ 8%		+ 8.7%		

TRADE

EUTRADE BALANCE

Beef & Live Animals

Trade Balance of Beef Products and Live Animals

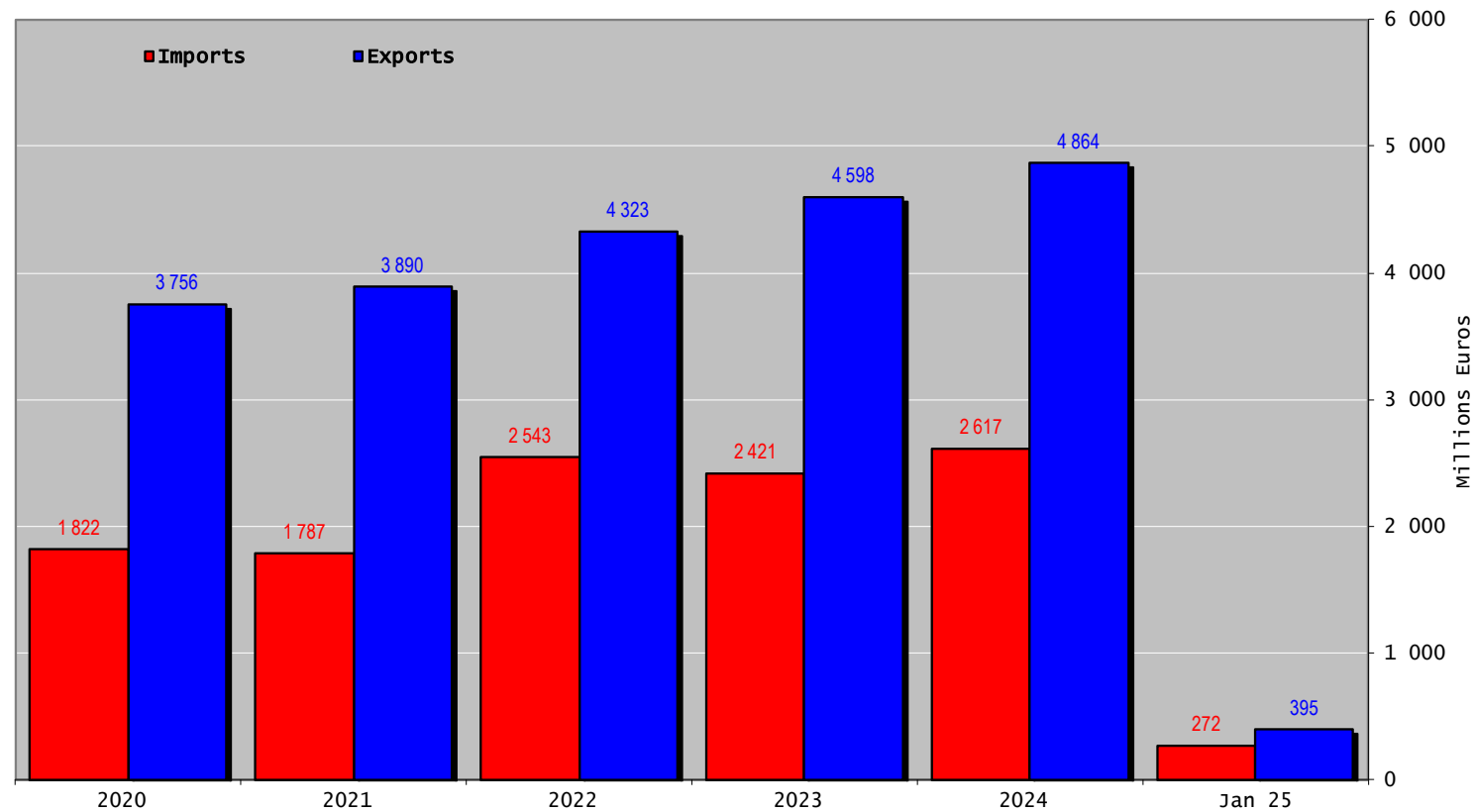


TRADE

EU TRADE BALANCE

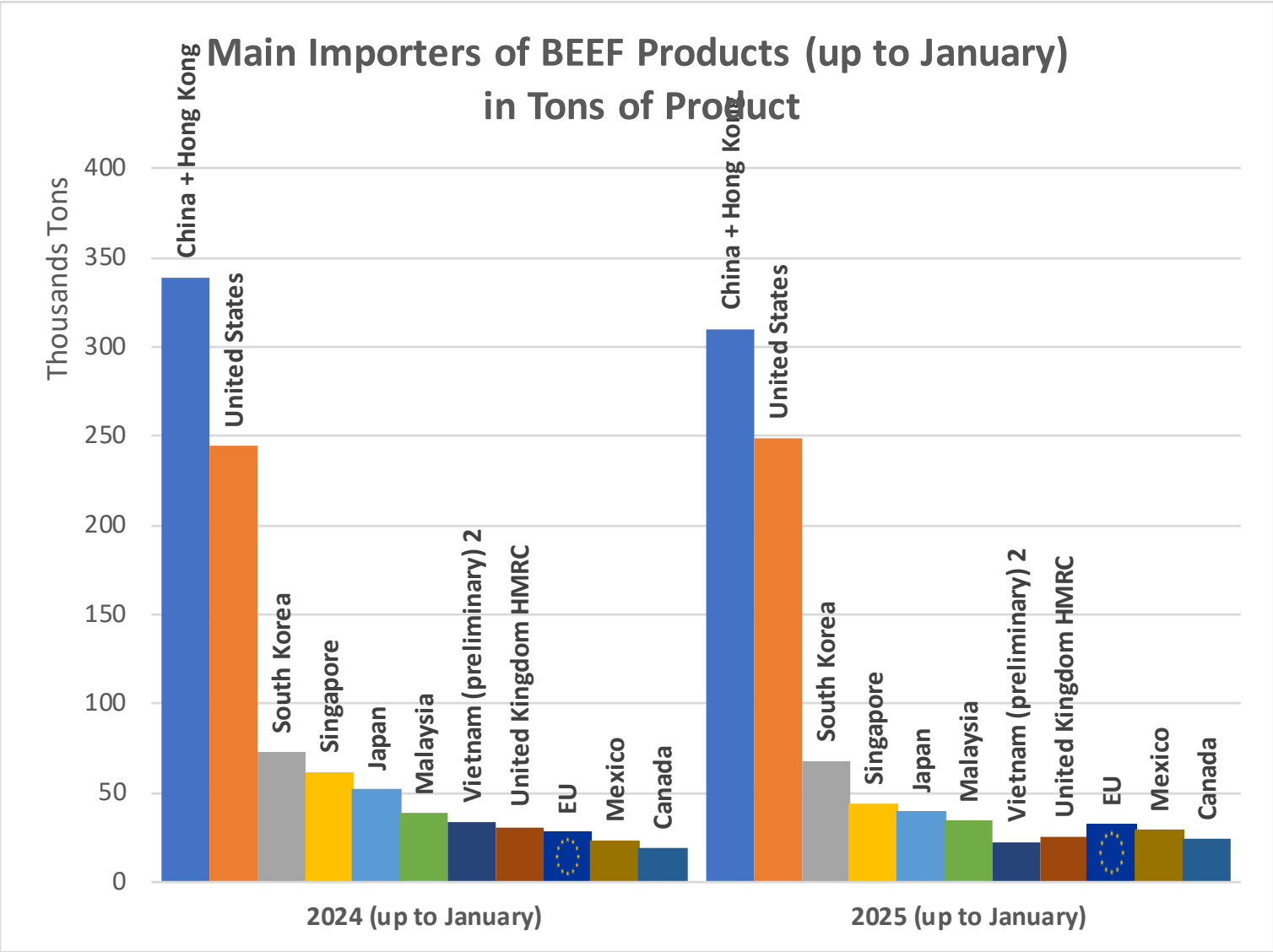
Beef & Live Animals

Trade Balance of Beef Products and Live Animals



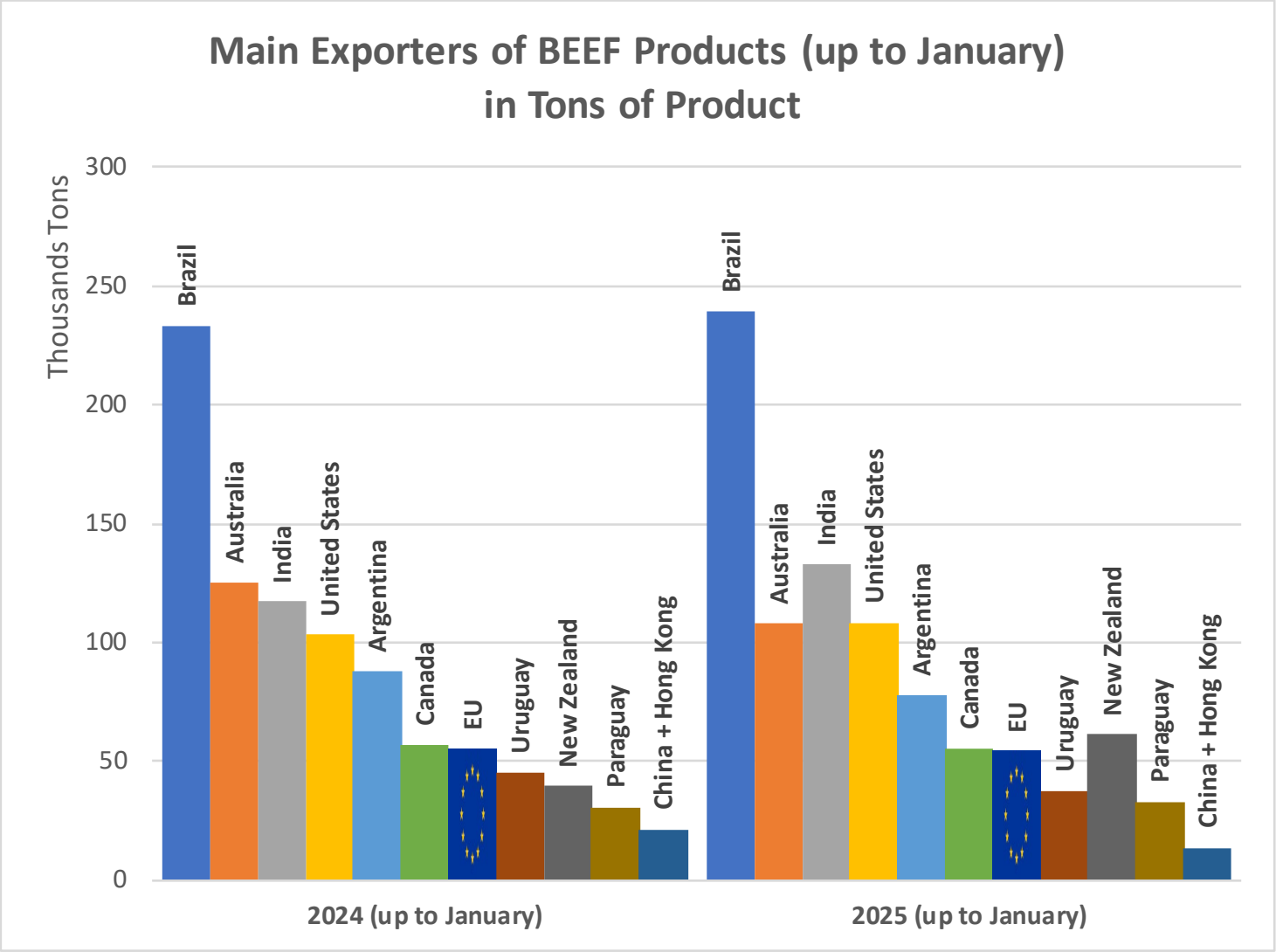
WORLD BEEF MARKET

BEEF MAIN IMPORTERS



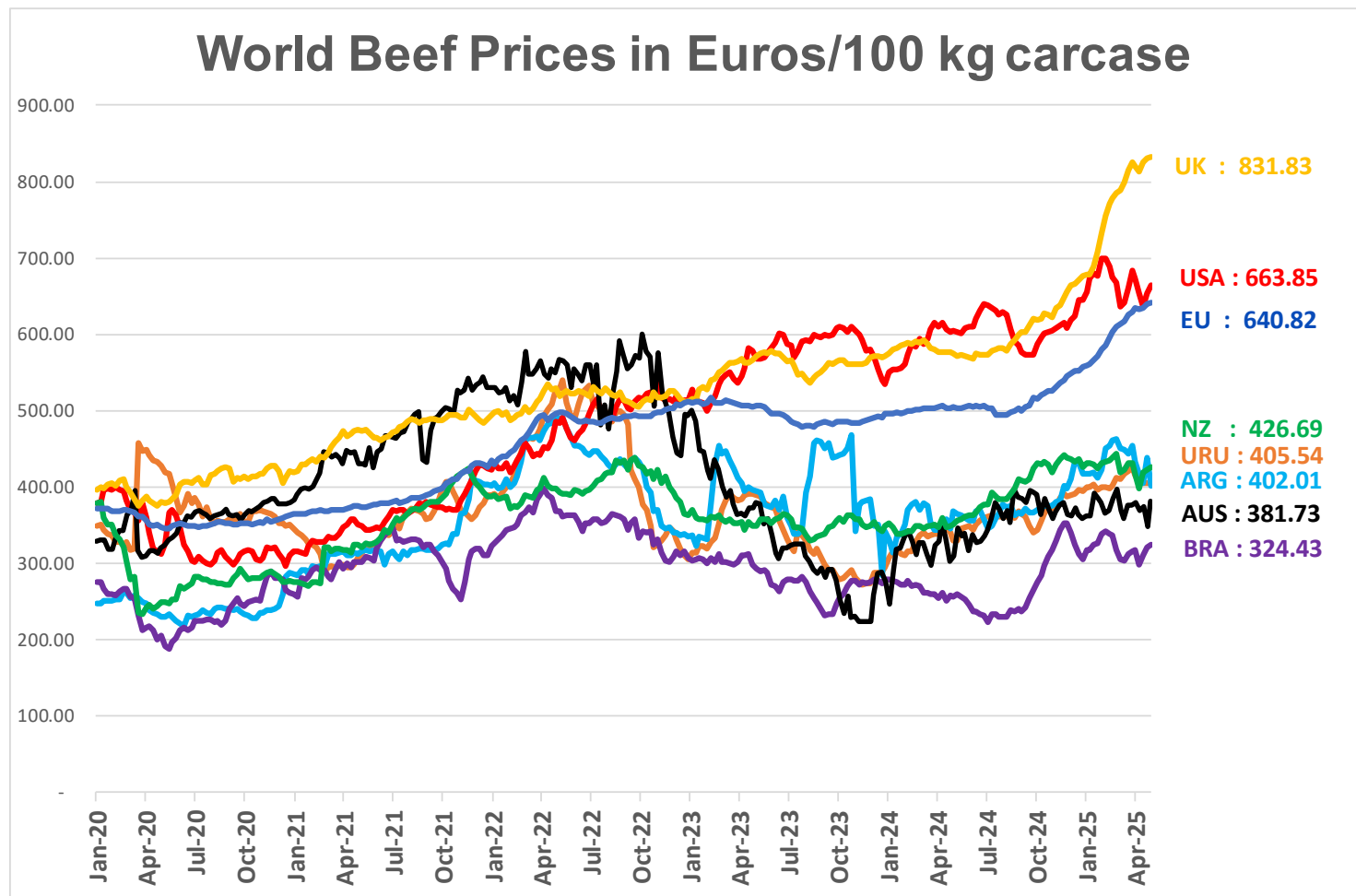
WORLD BEEF MARKET

BEEF MAIN EXPORTERS



WORLD BEEF MARKET

STEER PRICES
EU, US, AUS, NZ



USA, AUS, URU, ARG, NZ, BRA [World Beef Report](#)
GB <https://ahdb.org.uk/beef/gb-deadweight-cattle-prices-by-region>
EU [Member States Communication](#)

22 May 2025

THANK YOU VERY MUCH

More Information at:

EU Market Observatory

https://ec.europa.eu/agriculture/market-observatory/meat_en

And

Agri-FOOD data portal:

<http://agridata.ec.europa.eu/>