

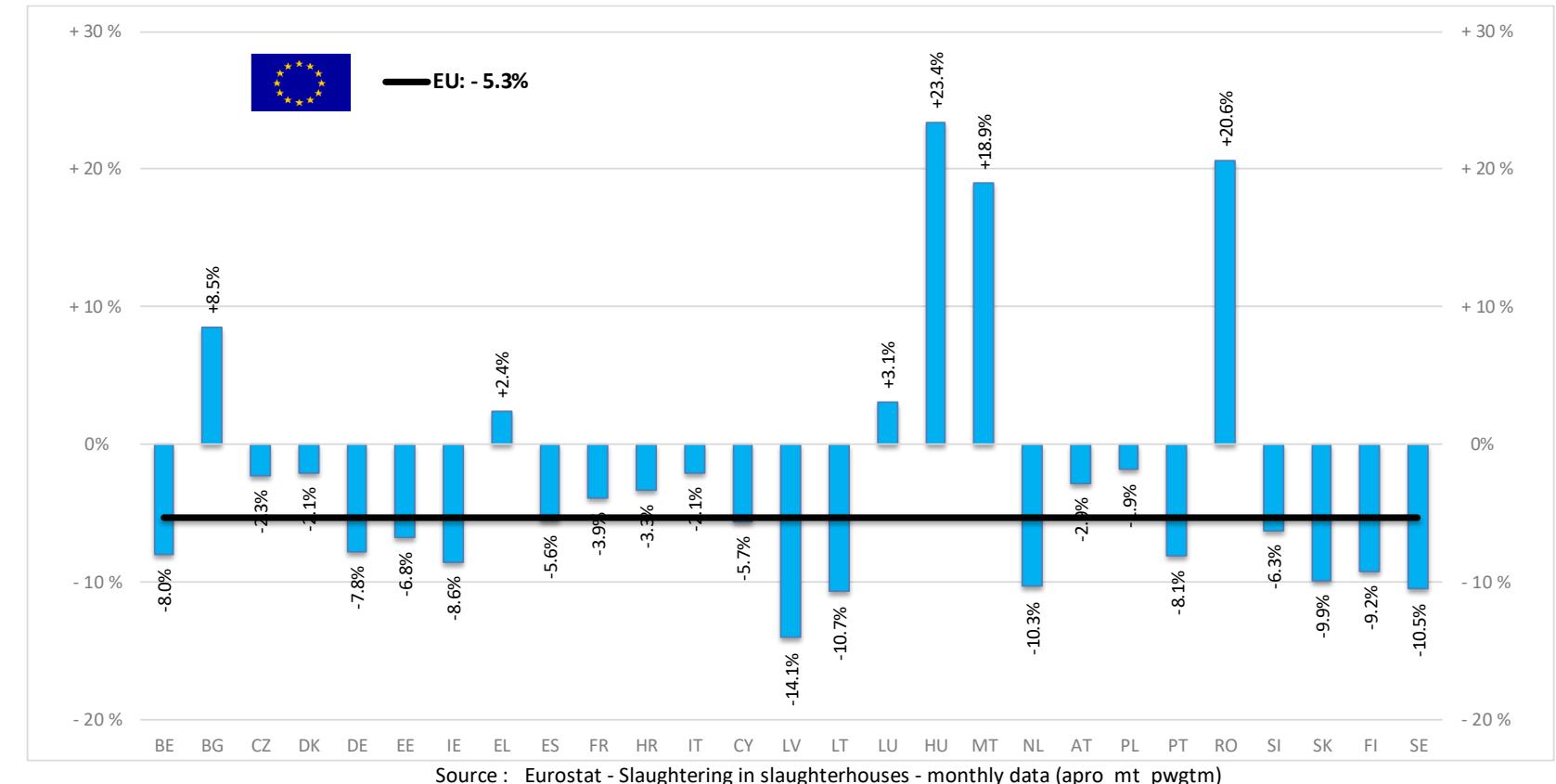
# BEEF & VEAL MARKET SITUATION

## 11 December 2025



# PRODUCTION % EVOLUTION HEADS

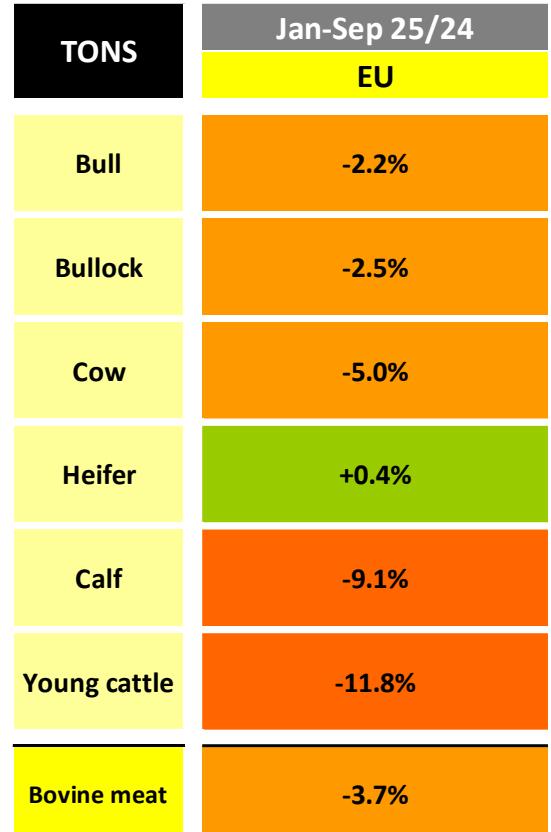
HEADS	Jan-Sep 25/24
EU	
Bull	-2.6%
Bullock	-3.0%
Cow	-6.3%
Heifer	-2.0%
Calf	-9.6%
Young cattle	-10.7%
Bovine meat	-5.3%



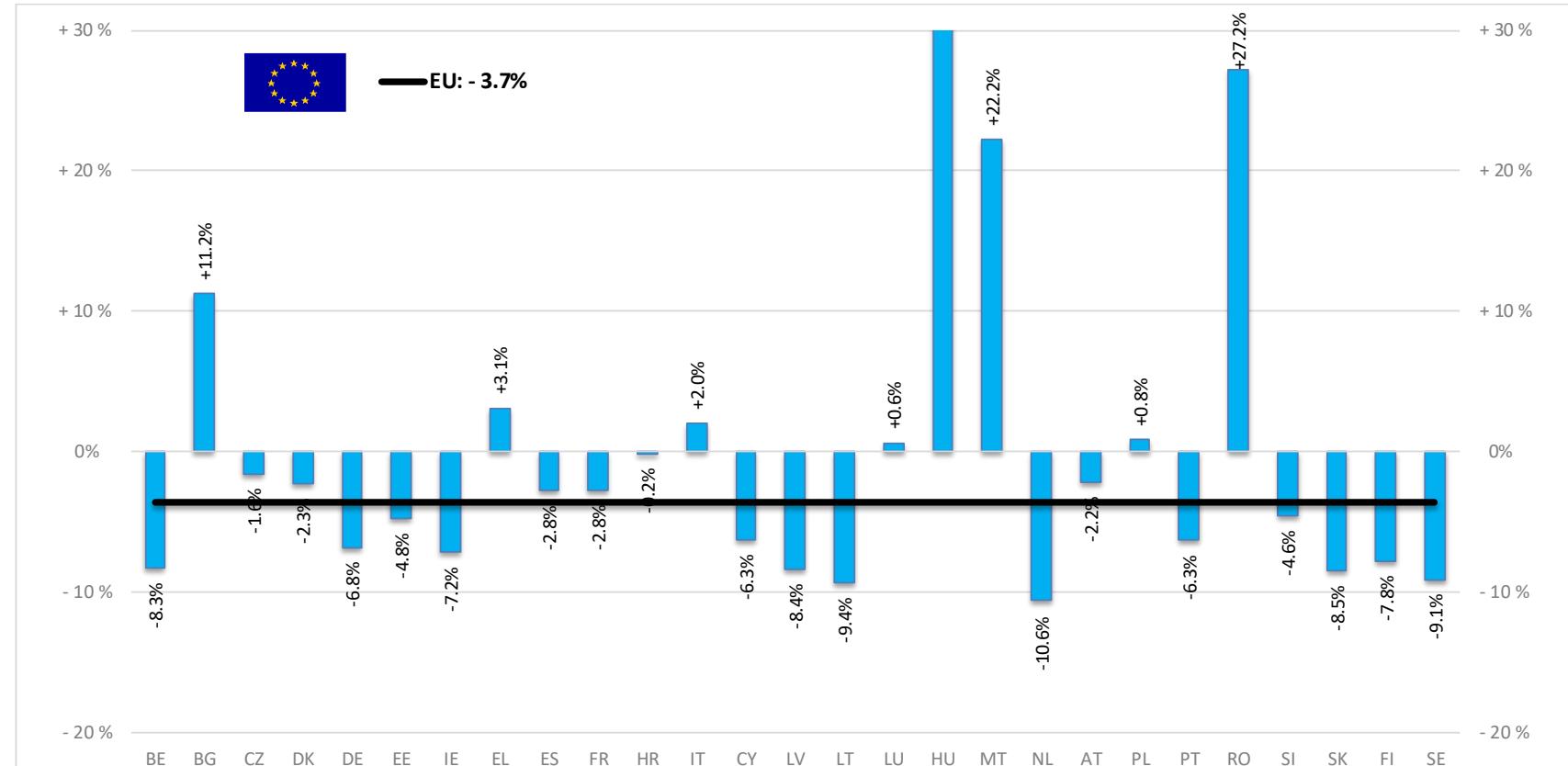
Estimates for last month of period : BG IT NL

# PRODUCTION

# % EVOLUTION TONNES



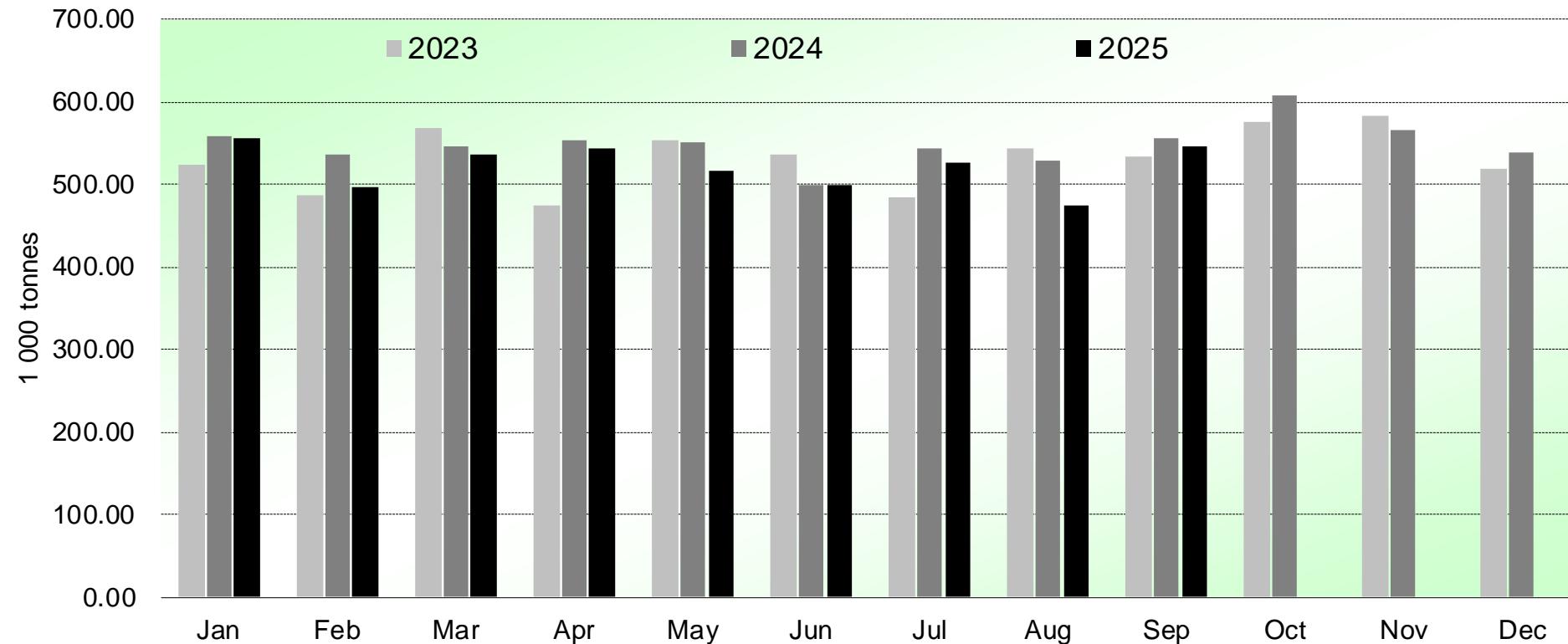
Estimates for last month of period : BG IT NL



# PRODUCTION

# HISTORIC TONNES

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



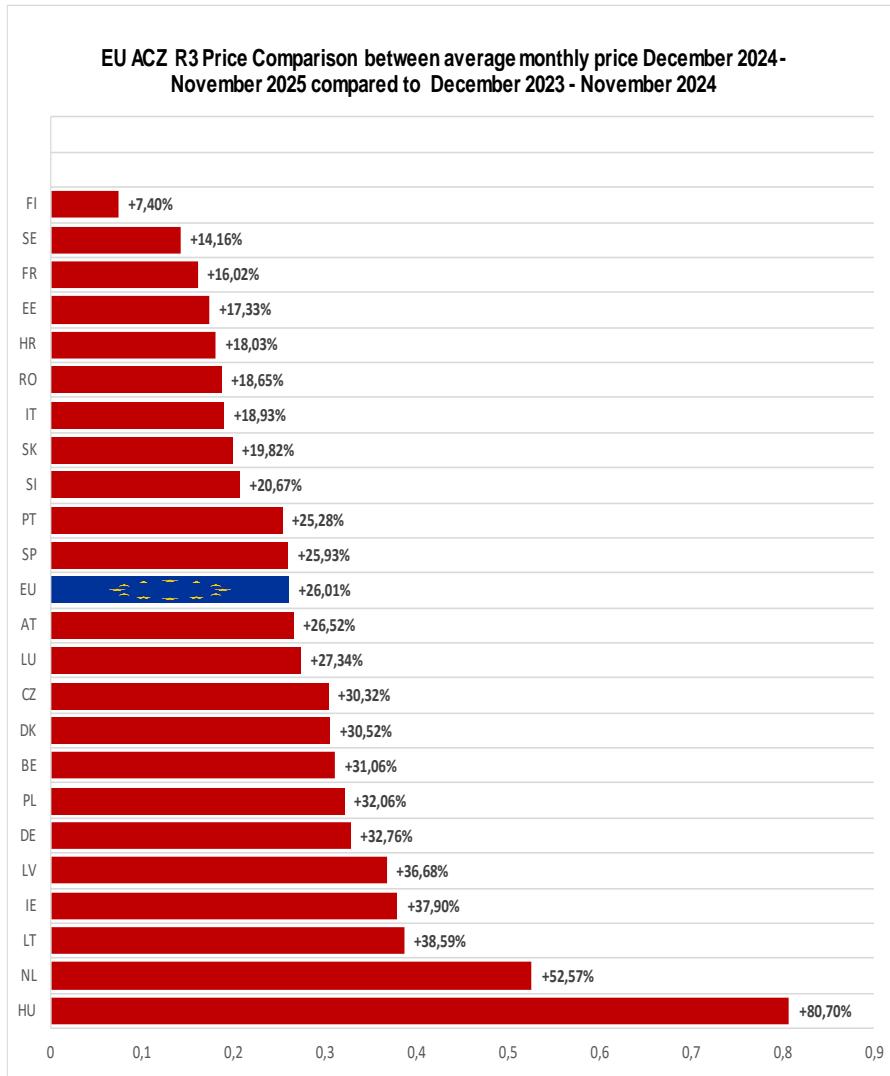
# PRICES CARCASSES

## Dashboard

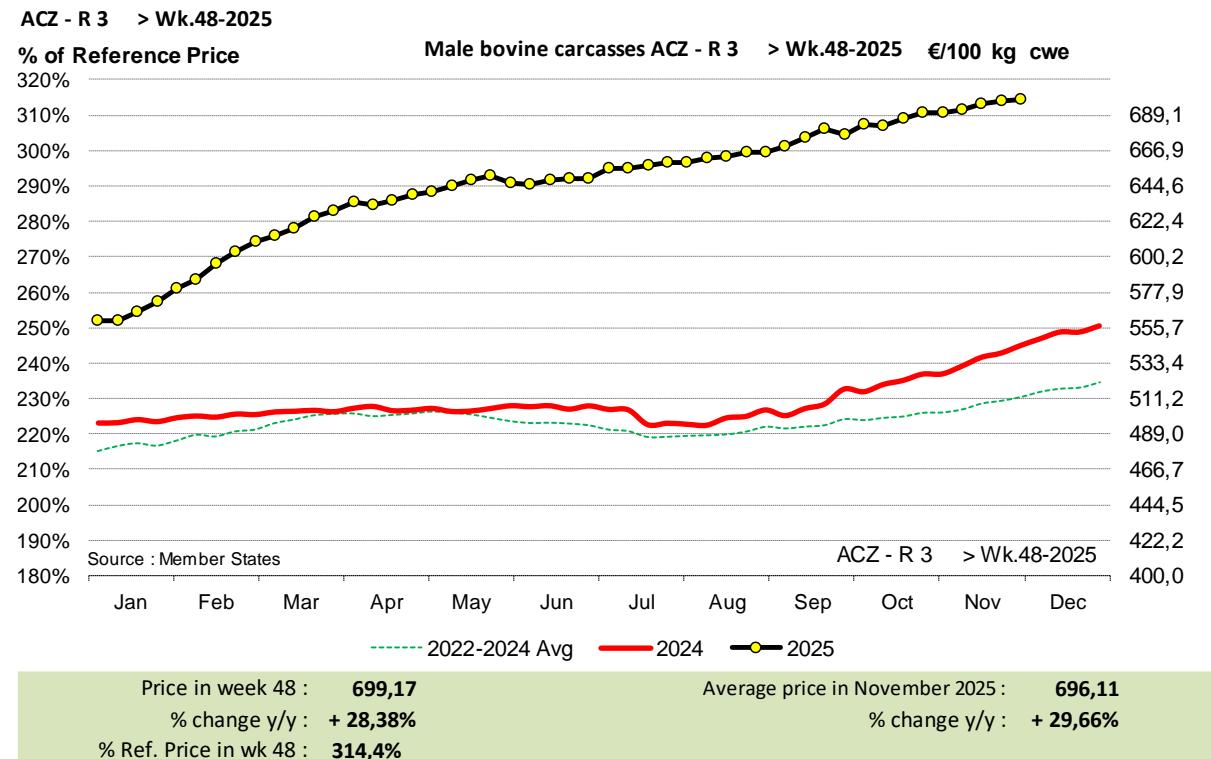
	EU Prices week	48	Evolution since last week	Evolution since last month	Evolution since last year
Average A/C/Z -R3	699.1	€/100 kg	+ 0.2%	+ 1.3%	+ 28.4%
Young Bovines (Z)	637.1		+ 0.9%	+ 1.7%	+ 21.5%
Young Bulls (A)	706.9		+ 0.2%	+ 1.8%	+ 28.6%
Steers (C)	752.9		- 0.8%	- 1.6%	+ 37.4%
Cows (D)	609.0		+ 0.4%	- 0.9%	+ 36.8%
Heifers (E)	728.0		+ 0.2%	+ 0.3%	+ 32.3%
Calves slaughtered <8M	836.2		+ 0.7%	+ 1.7%	+ 23.1%
Male Calves Dairy Type	245.0	€/head	- 0.7%	+ 0.5%	+ 65.1%
Male Calves Beef Type	431.8	€/head	- 0.4%	+ 0.8%	+ 50.0%
Young Store Cattle	5.48	€/kg	- 0.7%	- 1.8%	+ 47.0%
Yearling Male Store Cattle	5.88	€/kg	+ 1.1%	+ 2.9%	+ 37.7%
Yearling Female Store Cattle	5.08	€/kg	+ 1.0%	+ 2.1%	+ 52.5%

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

# PRICES CARCASES

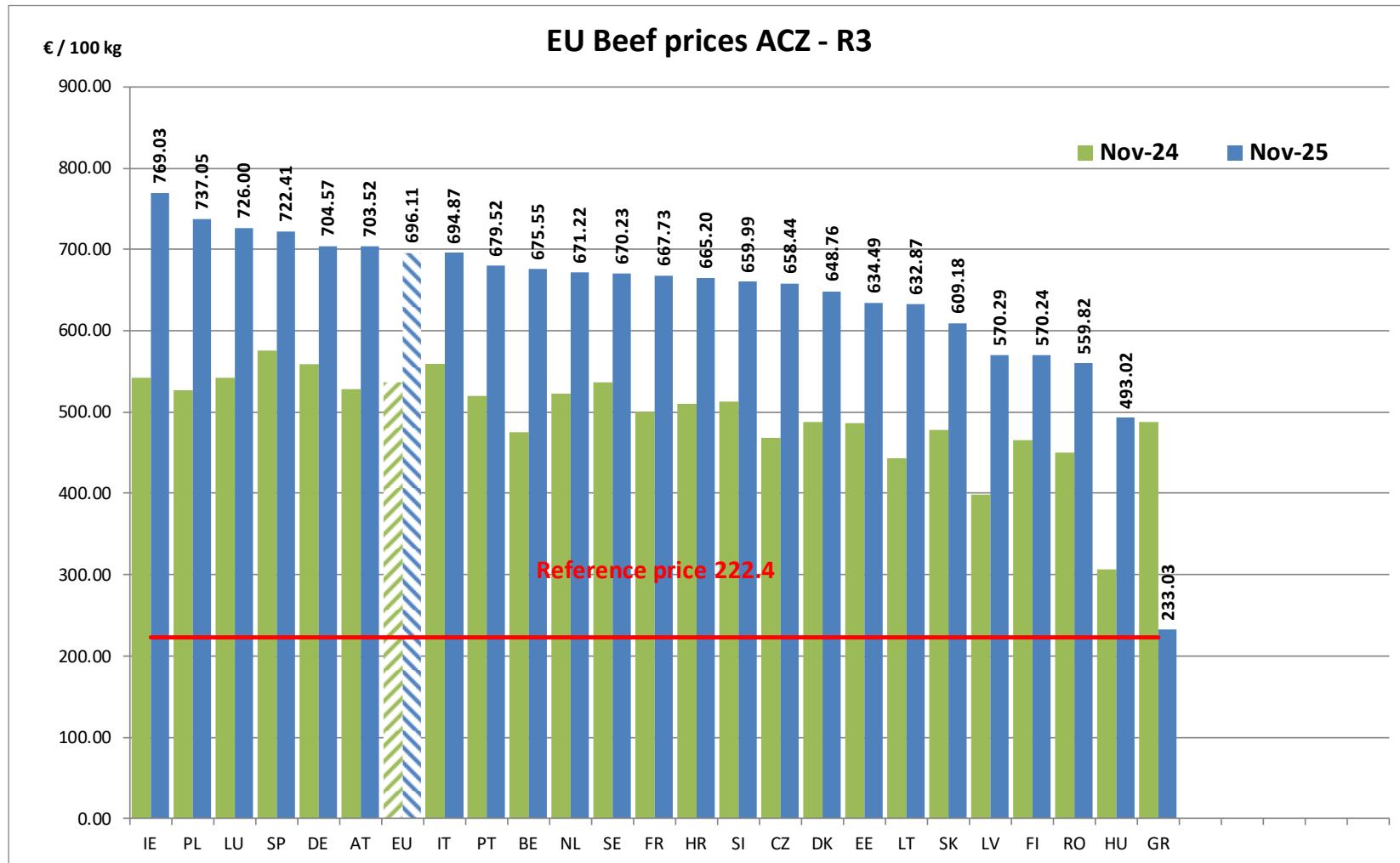


# EU EVOLUTION A/C/Z. R3



# PRICES CARCASES

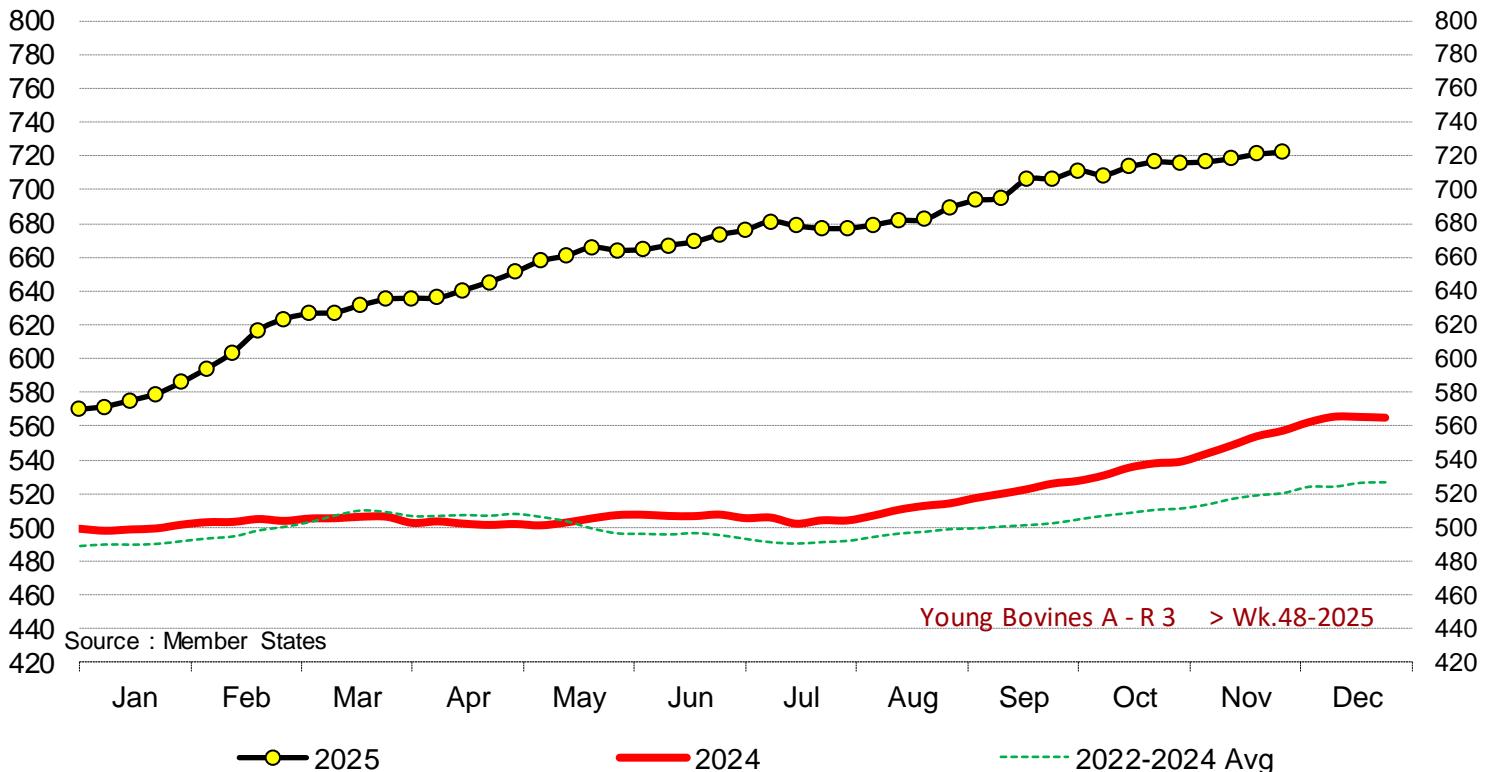
EU EVOLUTION  
A/C/Z. R3



# PRICES CARCASES

# EU EVOLUTION YOUNG BULL – A.R3

Young Bovines A - R 3 > Wk.48-2025



Price in week 48 : **721.91**  
 % change y/y : **+ 29.5%**

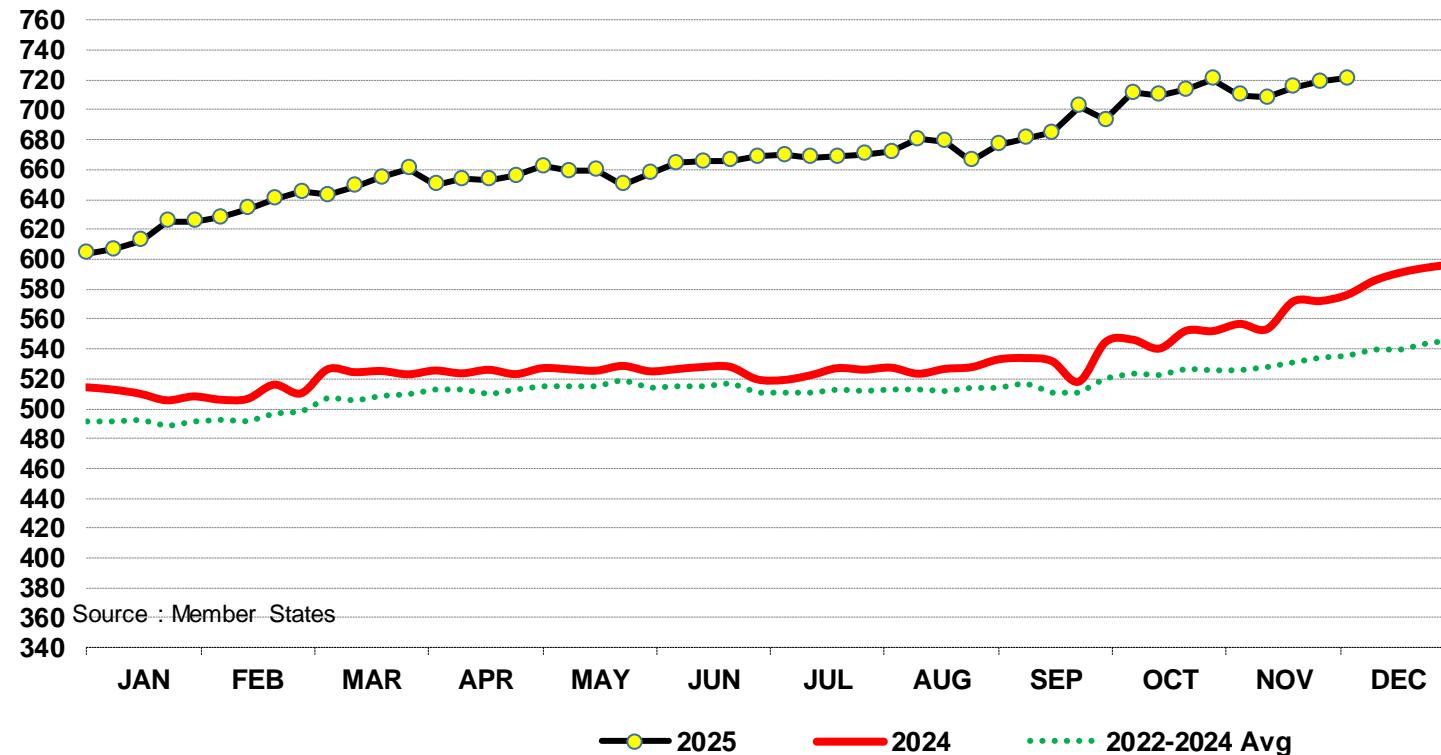
Average price in November 2025 : **719.03**  
 % change y/y : **+ 30.9%**

# PRICES CARCASSES

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

In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.48-2025



Price in week 48 : 721.30

31/10/2025

Average price in November 2025 : 715.61

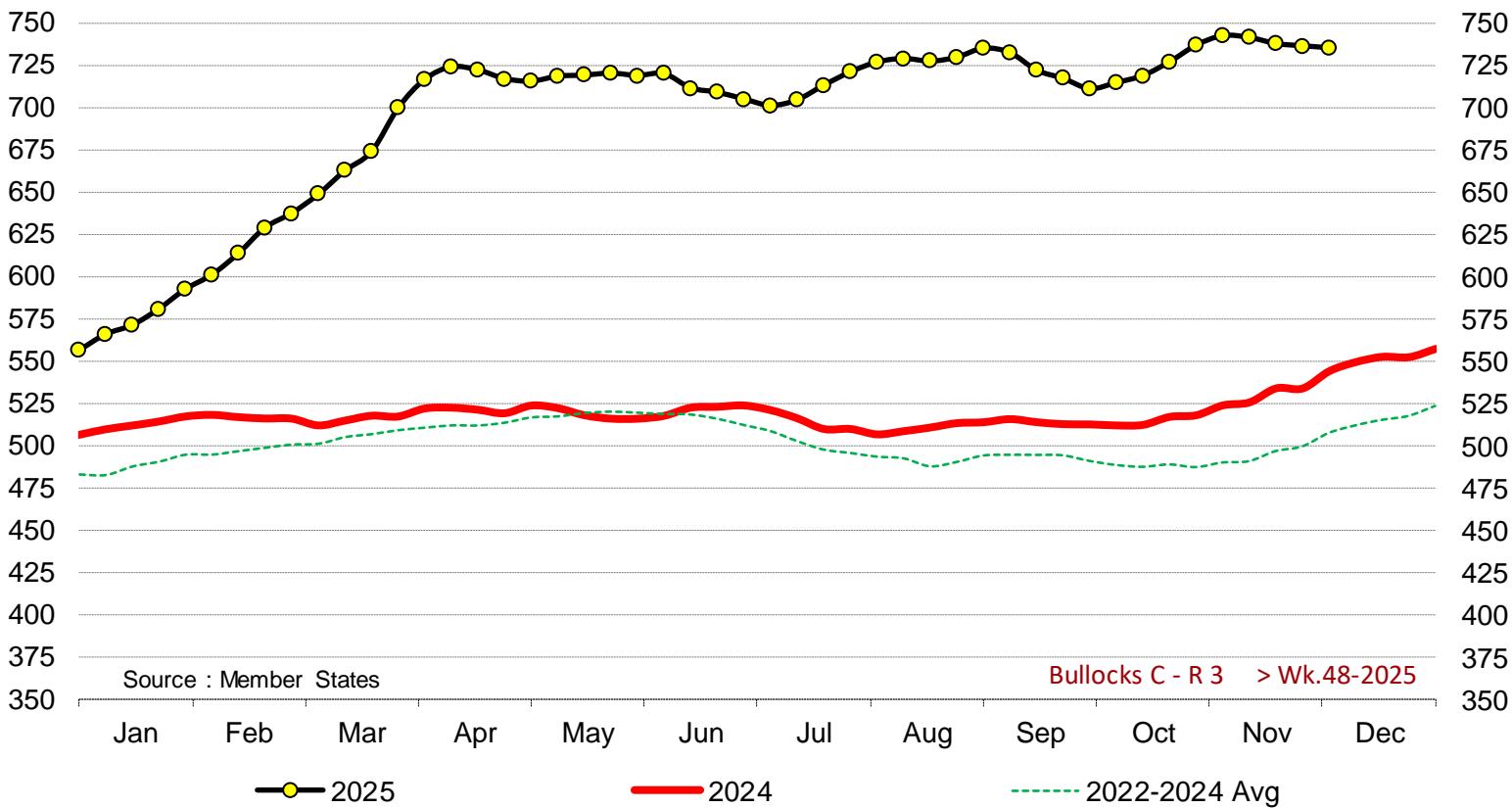
% change y/y : + 25.3%

% change y/y : + 26.3%

# PRICES CARCASES

# E.U. EVOLUTION STEER – C.R3

Bullocks C - R 3 > Wk.48-2025



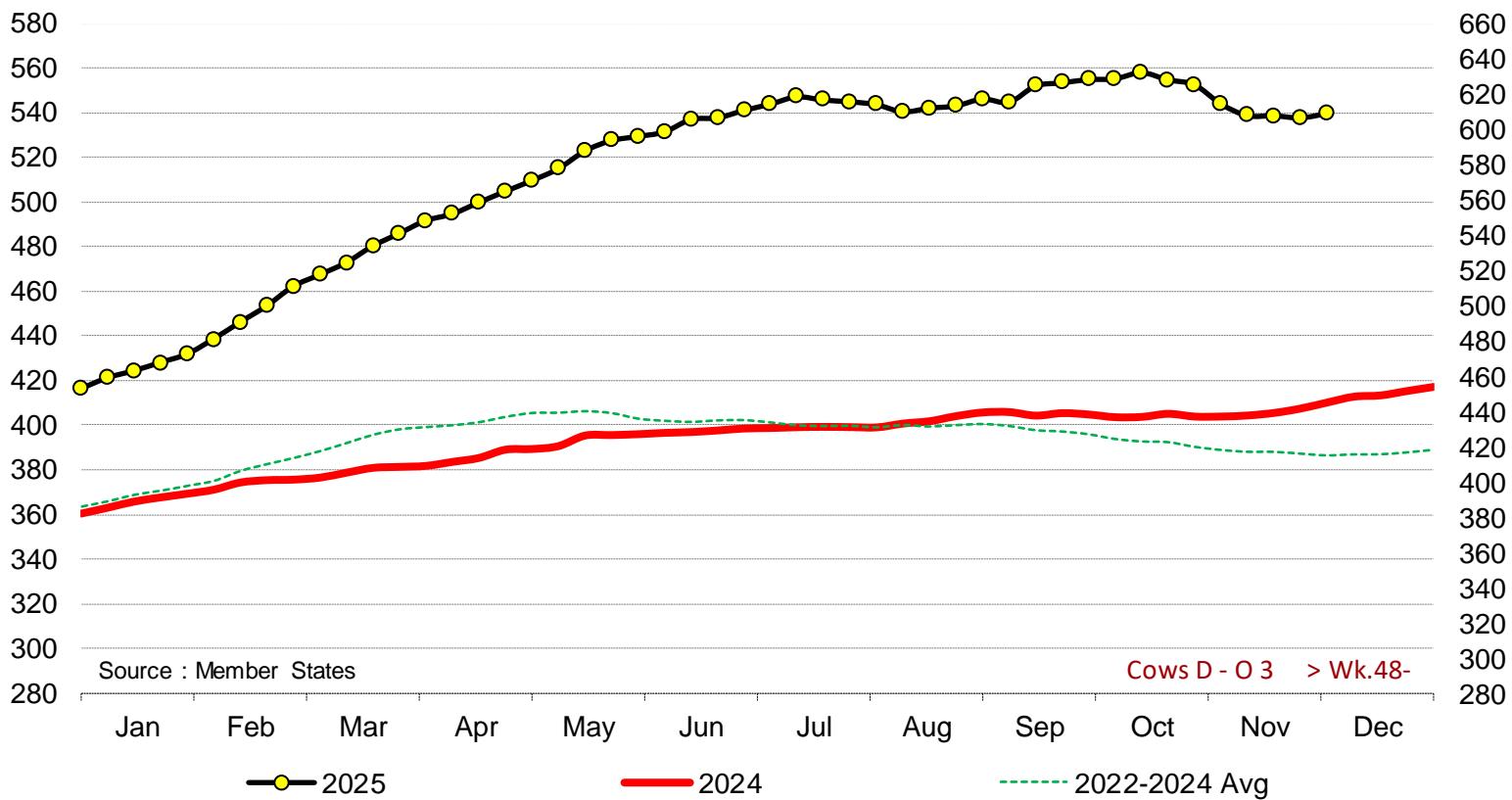
Price in week 48 : **734.92**  
 % change y/y : **+ 35.2%**

Average price in November 2025 : **737.65**  
 % change y/y : **+ 38.5%**

# PRICES CARCASSES

# E.U. EVOLUTION COW – D.03

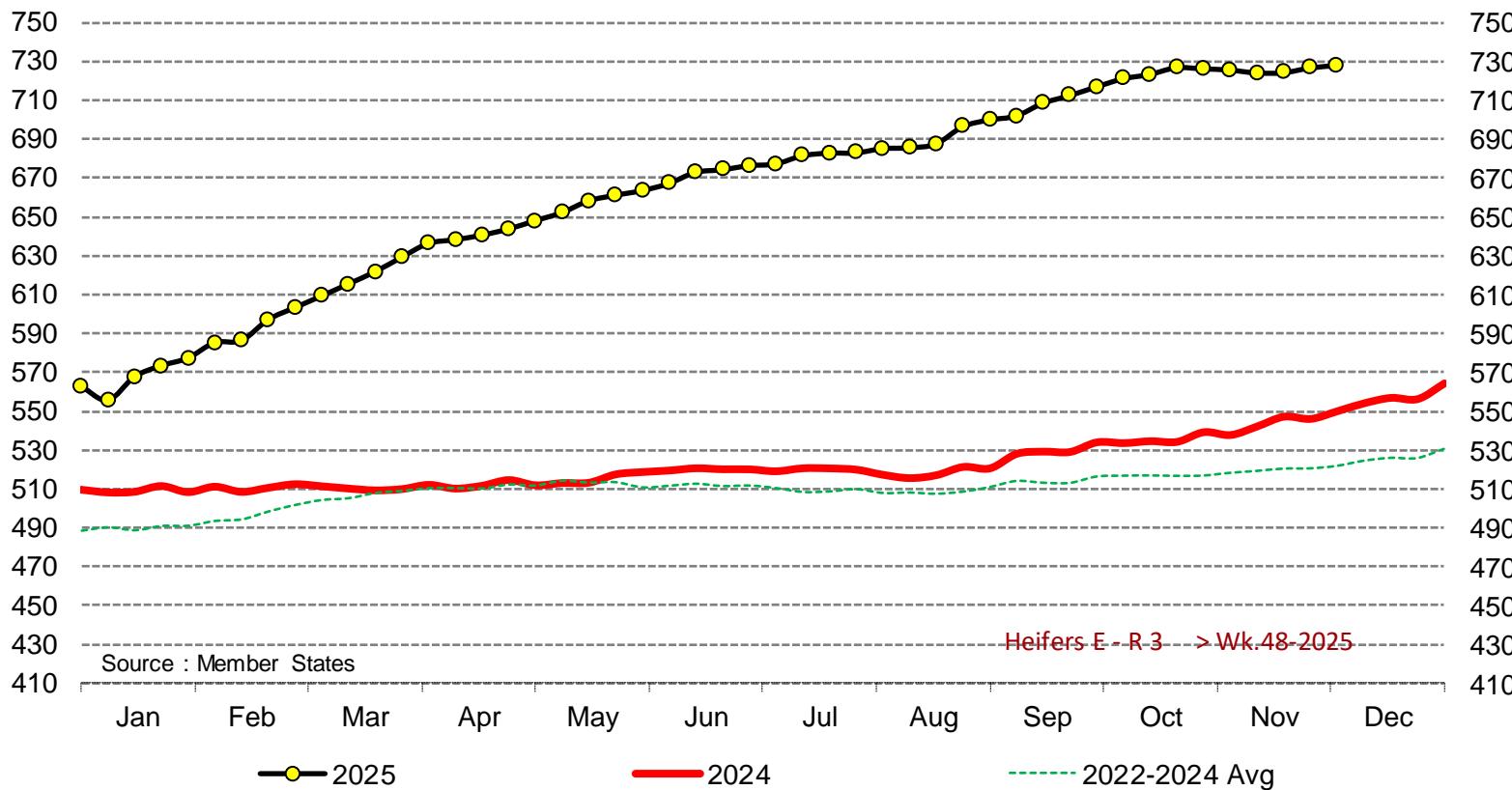
Cows D - O 3 > Wk.48-2025



# PRICES CARCASES

# EU EVOLUTION HEIFER – E.R3

Heifers E - R 3 > Wk.48-2025

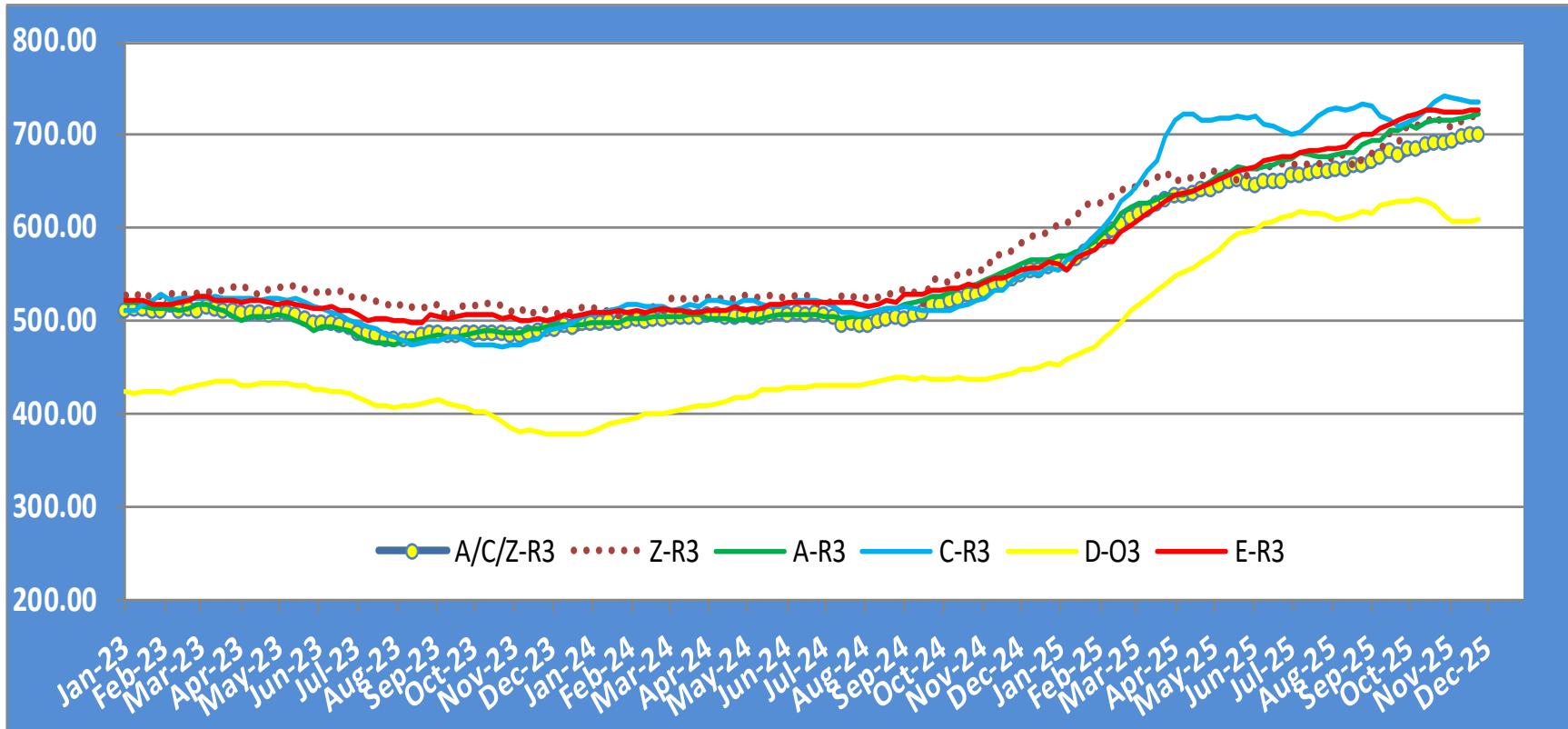


Price in week 48 : **728.04**  
% change y/y : **+ 32.3%**

Average price in November 2025 : **725.81**  
% change y/y : **+ 33.0%**

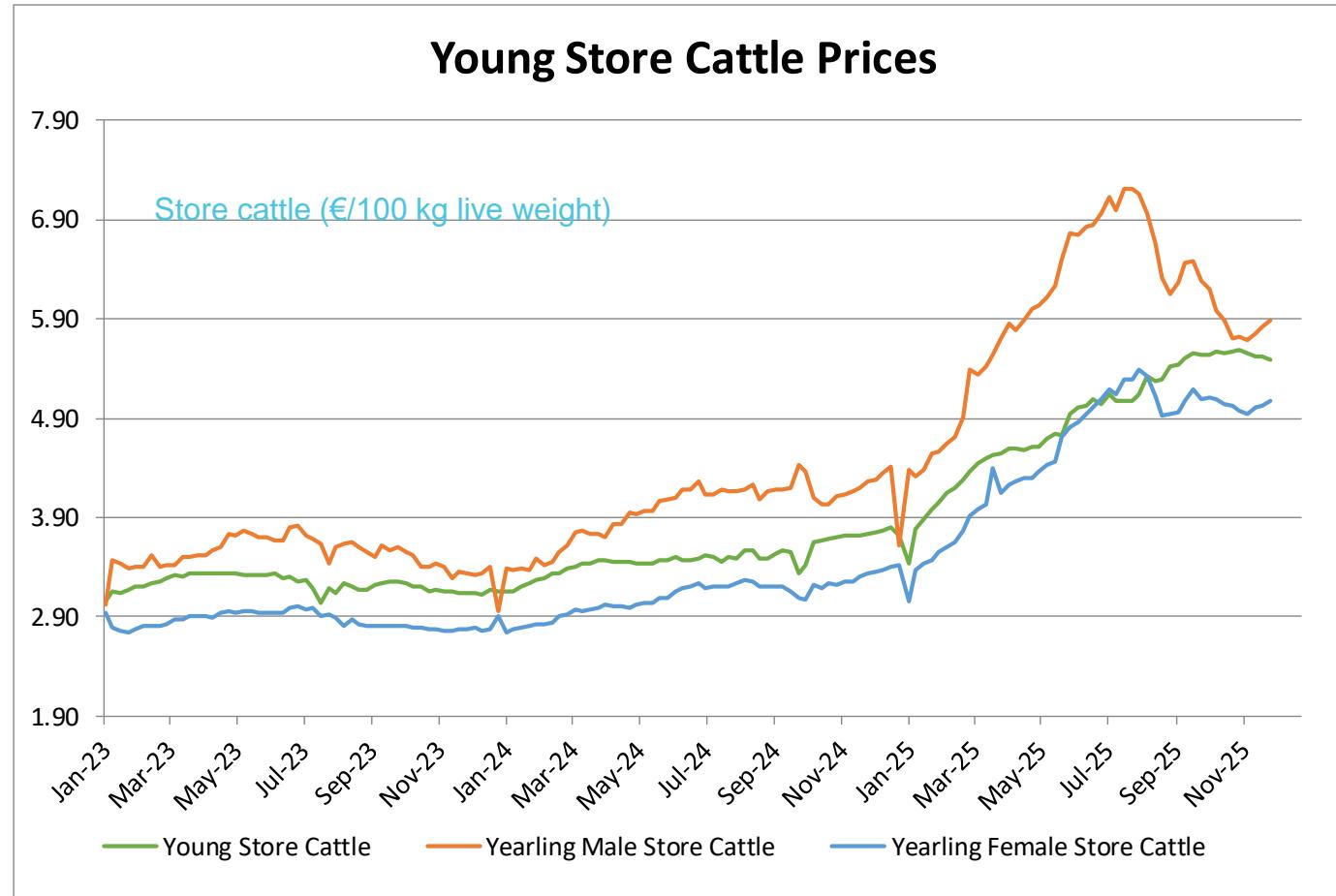
# PRICES CARCASES

EU EVOLUTION  
All CAT GLOBAL VIEW



# PRICES LIVE BOVINES

EU EVOLUTION  
STORE CATTLE

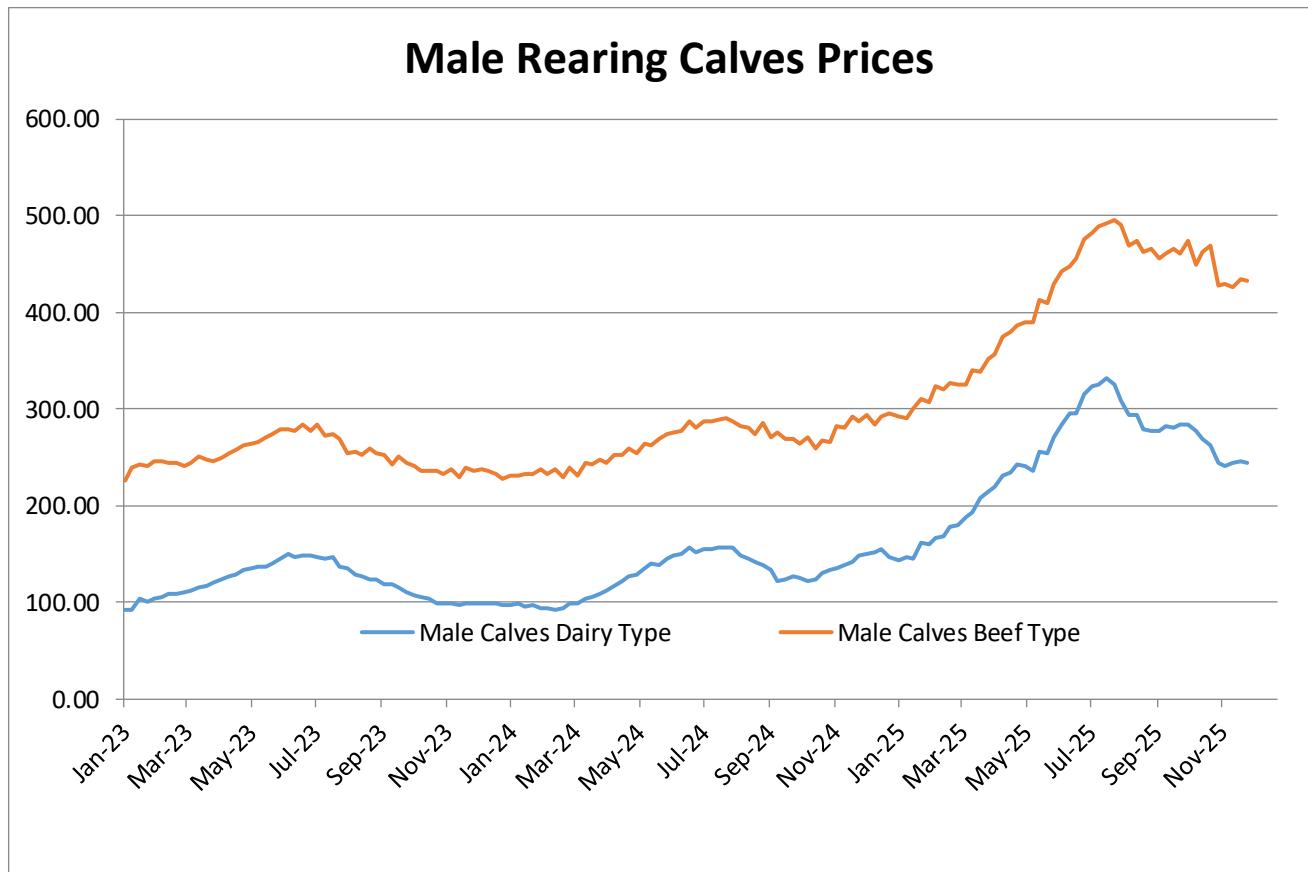


<b>Young Store Cattle Price in Week 48</b>	<b>5.48</b>	<b>Yearling Male Store Cattle Price</b>	<b>5.88</b>
Change y/y	+47.0%	Change y/y	+37.7%
<b>Yearling Female Store Cattle Price</b>	<b>5.08</b>		
Change y/y	+52.5%		

# 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 48  
Change y/y

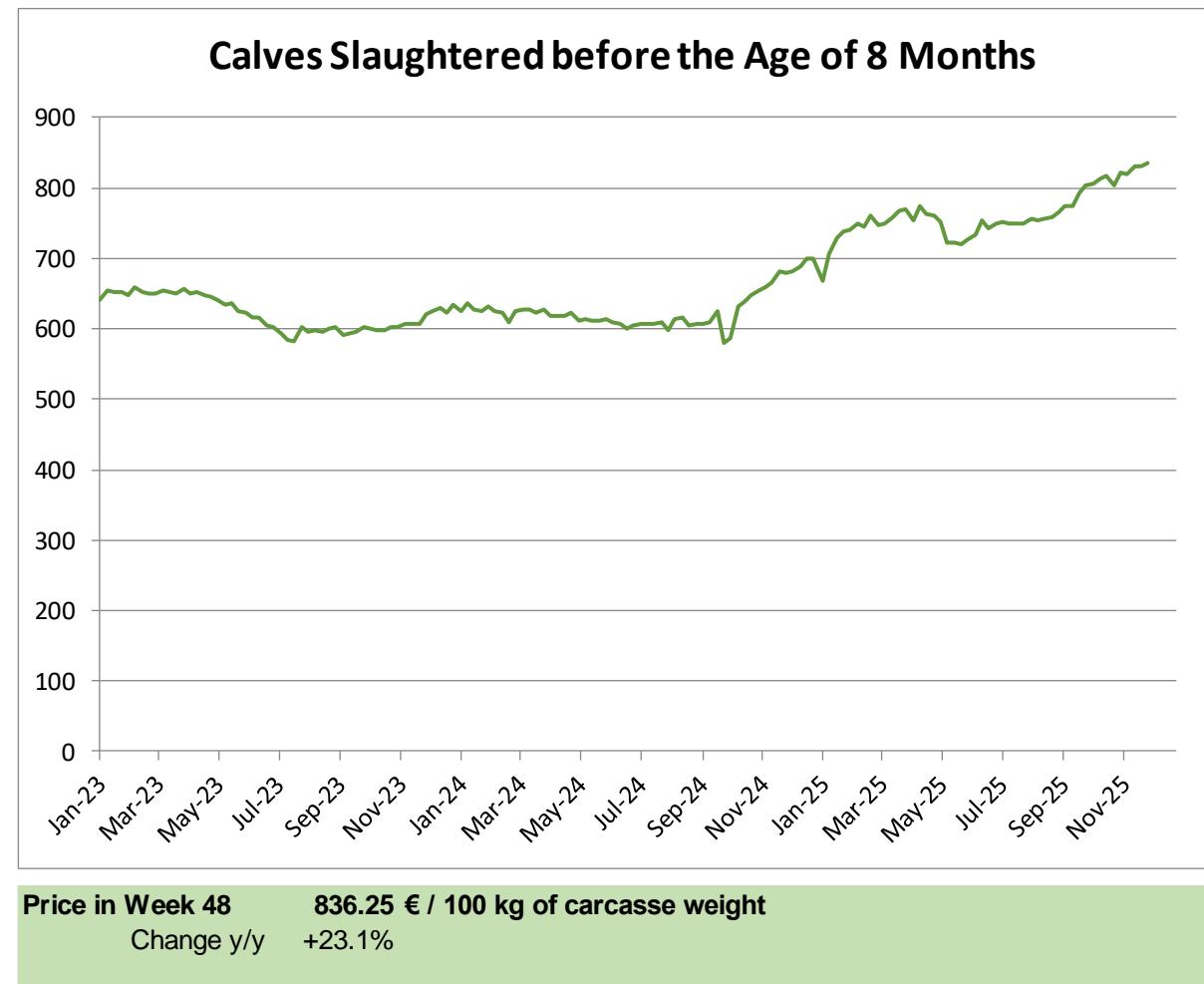
#### Male Rearing Calves Dairy type

Price in Week 48  
Change y/y

# PRICES LIVE BOVINES

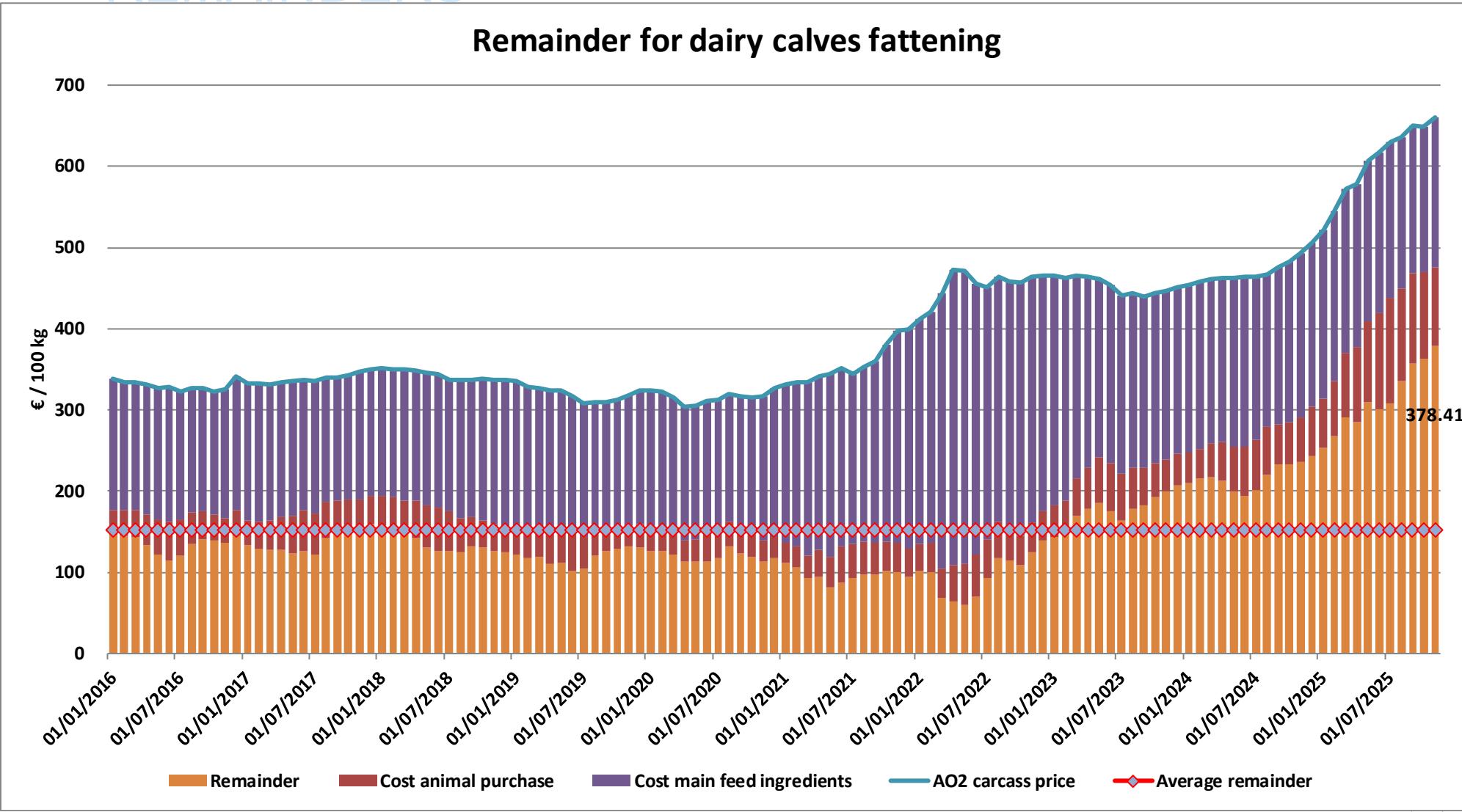
EU EVOLUTION  
Butcher Calves

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

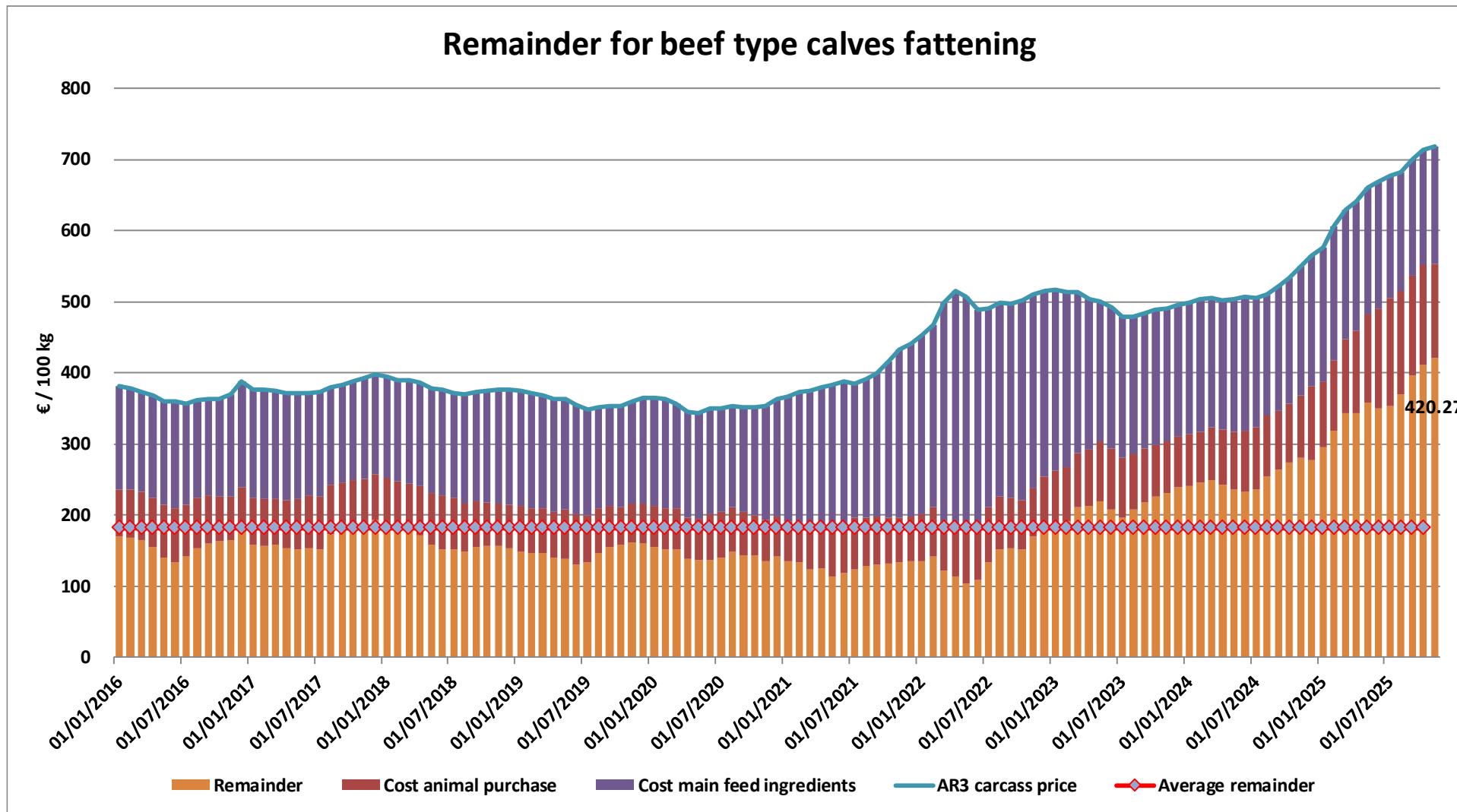


# REMAINDERS

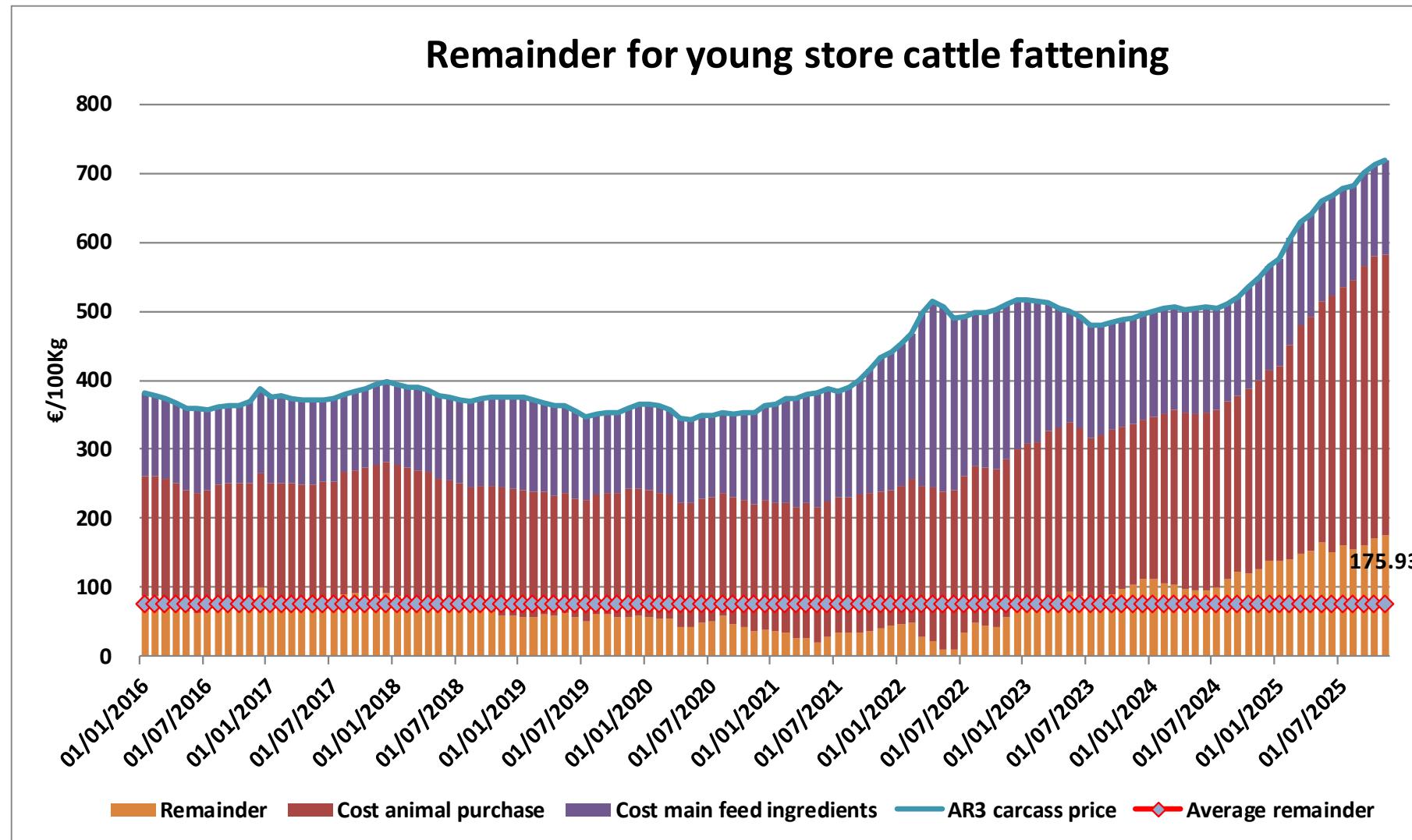
## Remainder for dairy calves fattening



# REMAINDERS



# REMAINDERS



# TRADE

# EU EXPORTS

## Beef & Live Animals

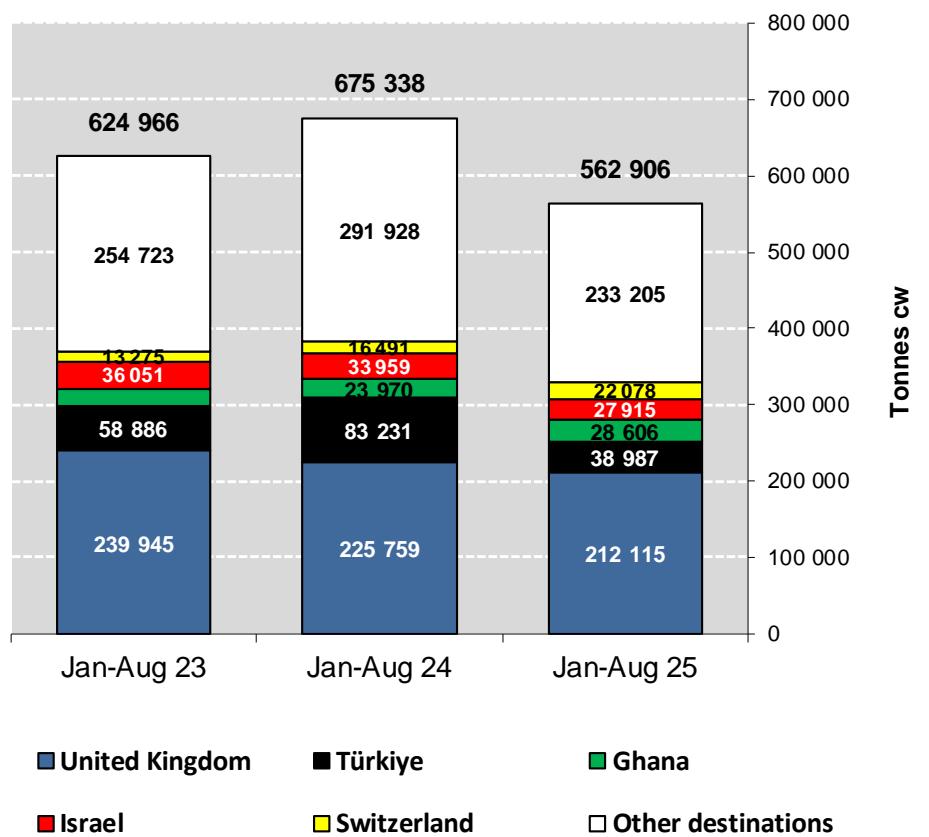
**EU Exports of Beef and Live Animals (excluding fats):  
Trade figures (COMEXT – tonnes cwe)**

Destinations	2021		2022		2023		2024		Jan-Aug 25		Compared to Jan-Aug 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	344 633	33.4%	366 345	38.9%	368 961	38.4%	343 706	34.6%	212 115	37.7%	- 6.0%
Türkiye	14 953	1.5%	14 168	1.5%	90 924	9.5%	109 068	11.0%	38 987	6.9%	- 53.2%
Ghana	47 618	4.6%	32 171	3.4%	33 889	3.5%	35 125	3.5%	28 606	5.1%	+ 19.3%
Israel	66 022	6.4%	63 618	6.7%	45 146	4.7%	50 633	5.1%	27 915	5.0%	- 17.8%
Switzerland	28 717	2.8%	24 958	2.6%	19 376	2.0%	23 563	2.4%	22 078	3.9%	+ 33.9%
Bosnia-Herz.	40 504	3.9%	38 796	4.1%	45 285	4.7%	42 007	4.2%	21 772	3.9%	- 22.0%
Algeria	24 111	2.3%	25 459	2.7%	11 905	1.2%	30 953	3.1%	21 228	3.8%	+ 11.3%
Ivory Coast	29 187	2.8%	29 882	3.2%	30 208	3.1%	28 129	2.8%	20 590	3.7%	+ 17.3%
Morocco	11 868	1.2%	8 273	0.9%	25 612	2.7%	31 347	3.2%	19 754	3.5%	+ 11.0%
Kosovo	16 478	1.6%	17 069	1.8%	22 694	2.4%	26 606	2.7%	13 188	2.3%	- 24.9%
Canada	20 670	2.0%	19 928	2.1%	15 907	1.7%	17 556	1.8%	9 790	1.7%	- 10.5%
Lebanon	19 527	1.9%	21 026	2.2%	21 627	2.2%	20 327	2.0%	9 333	1.7%	- 45.3%
Hong Kong	44 769	4.3%	10 570	1.1%	21 689	2.3%	17 330	1.7%	8 162	1.4%	- 37.7%
Norway	18 235	1.8%	12 903	1.4%	5 310	0.6%	4 200	0.4%	6 290	1.1%	+ 85.8%
Ukraine	15 078	1.5%	11 969	1.3%	10 088	1.0%	10 770	1.1%	6 182	1.1%	- 12.5%
North Macedonia	7 068	0.7%	9 934	1.1%	9 975	1.0%	11 412	1.1%	6 165	1.1%	- 20.7%
Other Destinations	281 539	27.3%	235 439	25.0%	182 676	19.0%	190 256	19.2%	90 752	16.1%	
<b>Total</b>	<b>1 030 978</b>		<b>942 510</b>		<b>961 274</b>		<b>992 988</b>		<b>562 906</b>		
% change				- 9%				+ 2%			- 16.6%

# TRADE

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

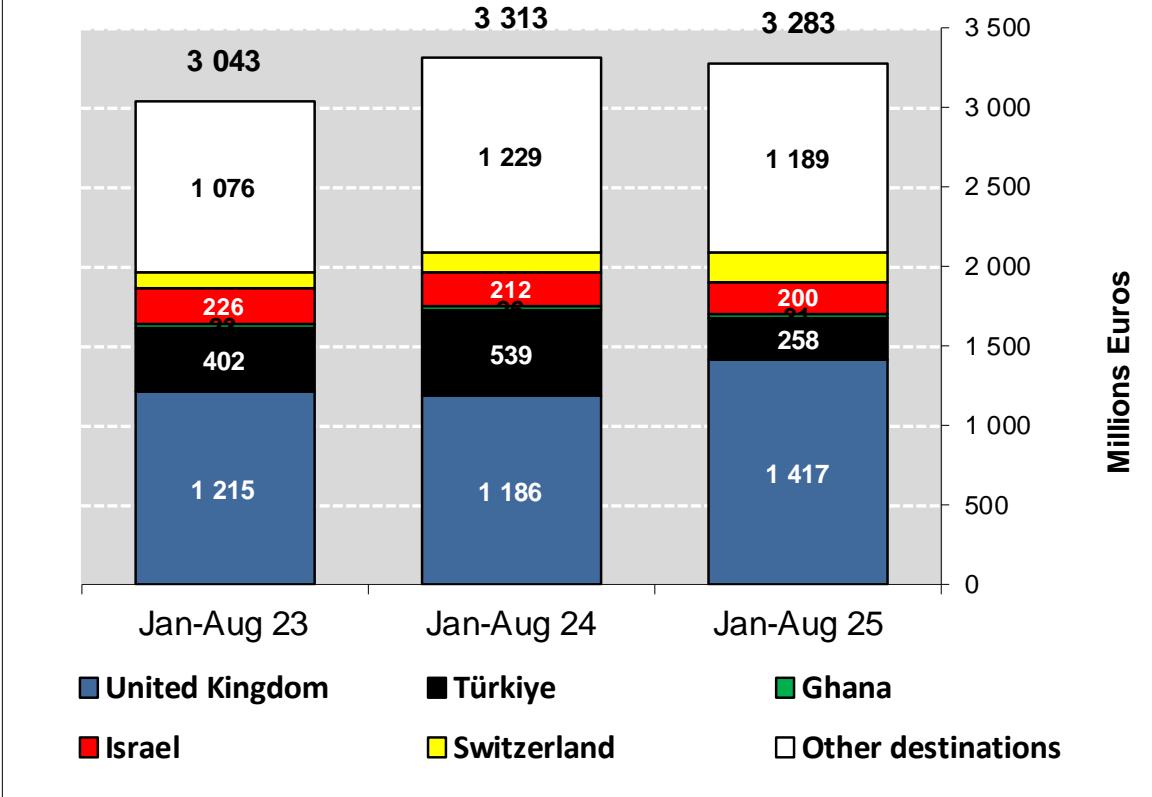
### EU EXPORTS of Beef & Veal (Tonnes cwe)



# EU EXPORTS

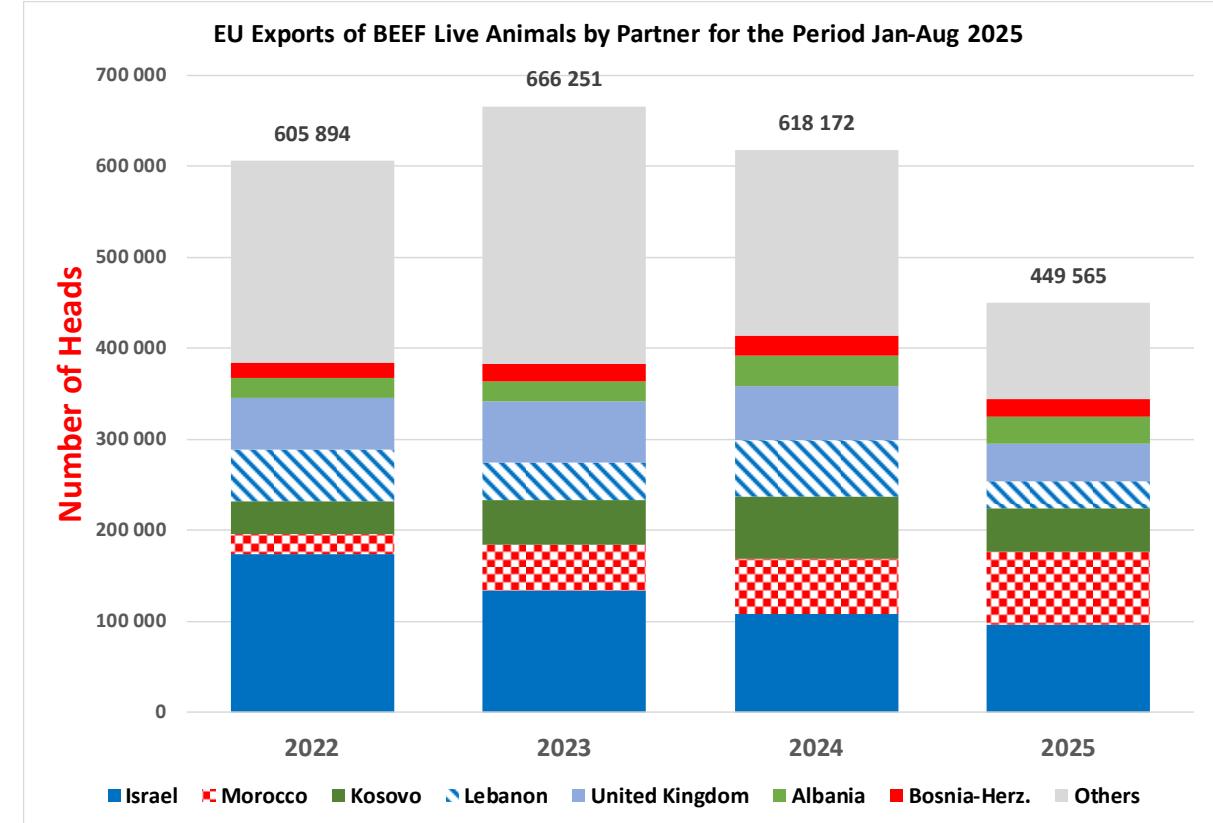
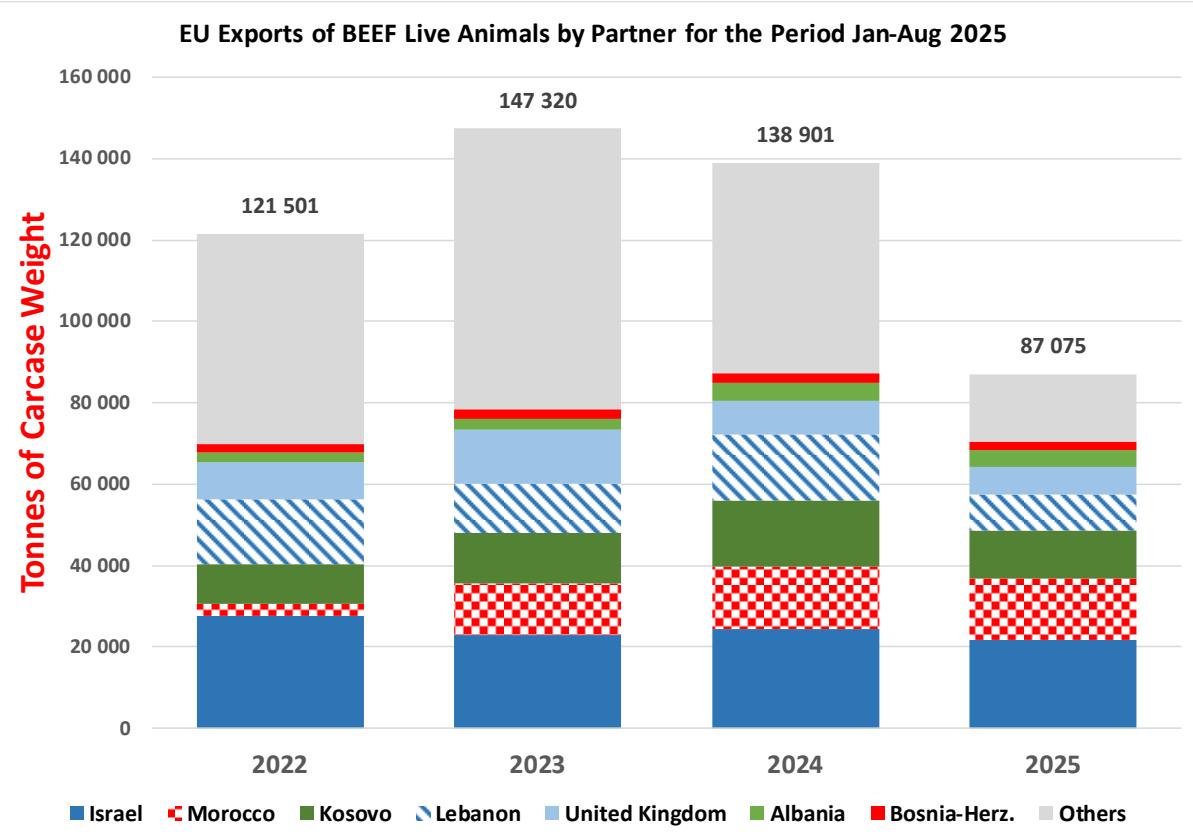
## Beef & Live Animals (Excl Fats)

### EU EXPORTS of Beef & Veal (Million EUR)



# TRADE

## EU EXPORTS Live Animals



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

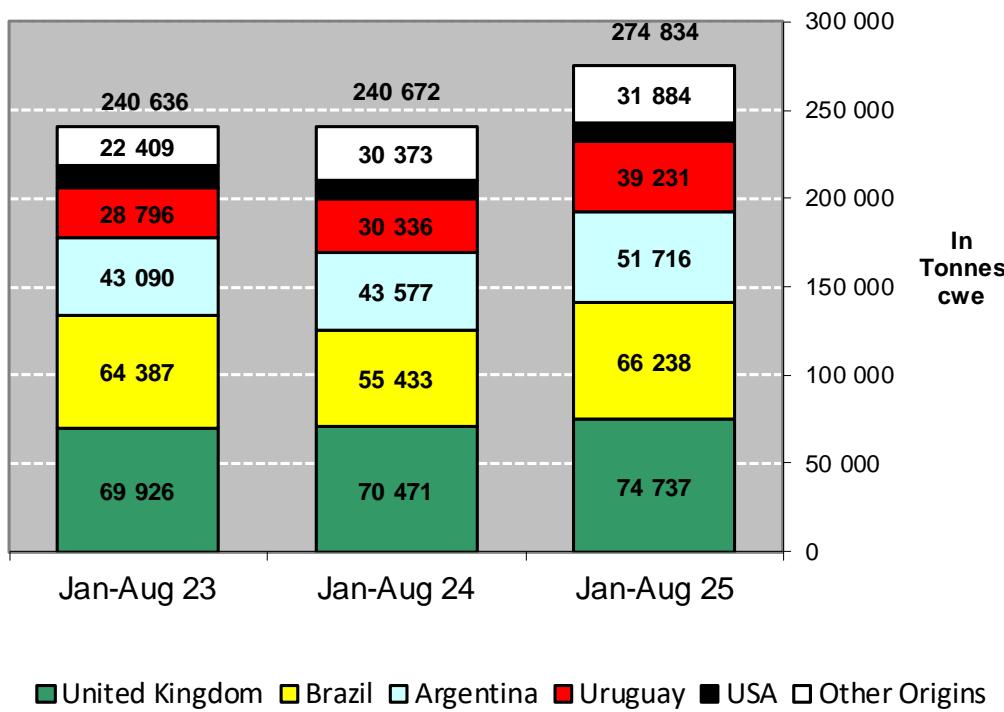
Origins	2021		2022		2023		2024		Jan-Aug 25		Compared to Jan-Aug 24
	tonnes	%									
United Kingdom	87 596	28.3%	118 759	33.0%	108 186	30.7%	111 409	29.4%	74 737	27.2%	+ 6.1%
Brazil	81 737	26.4%	86 512	24.0%	86 934	24.7%	87 607	23.1%	66 238	24.1%	+ 19.5%
Argentina	52 300	16.9%	62 584	17.4%	63 094	17.9%	68 730	18.1%	51 716	18.8%	+ 18.7%
Uruguay	42 669	13.8%	37 619	10.5%	41 544	11.8%	44 252	11.7%	39 231	14.3%	+ 29.3%
USA	14 910	4.8%	17 269	4.8%	18 345	5.2%	16 526	4.4%	11 029	4.0%	+ 5.2%
Namibia	1 996	0.6%	5 168	1.4%	7 903	2.2%	15 547	4.1%	7 374	2.7%	- 13.0%
Australia	8 925	2.9%	8 385	2.3%	7 700	2.2%	8 352	2.2%	6 465	2.4%	+ 4.5%
New Zealand	4 380	1.4%	5 202	1.4%	4 531	1.3%	5 847	1.5%	5 078	1.8%	+ 30.4%
Paraguay	3 933	1.3%	5 404	1.5%	4 774	1.4%	5 303	1.4%	4 101	1.5%	+ 24.6%
Botswana	331	0.1%	928	0.3%	1 606	0.5%	7 718	2.0%	2 647	1.0%	- 28.2%
Switzerland	4 714	1.5%	4 730	1.3%	3 627	1.0%	3 793	1.0%	2 327	0.8%	+ 2.7%
Canada	1 816	0.6%	2 172	0.6%	1 456	0.4%	1 102	0.3%	1 028	0.4%	+ 56.6%
Japan	1 478	0.5%	2 160	0.6%	836	0.2%	1 171	0.3%	892	0.3%	+ 38.3%
Serbia	963	0.3%	1 058	0.3%	812	0.2%	641	0.2%	498	0.2%	+ 21.2%
North Macedonia	61	0.0%	33	0.0%	29	0.0%	50	0.0%	420	0.2%	+++
Chile	238	0.1%	378	0.1%	365	0.1%	346	0.1%	399	0.1%	+ 56.0%
Other Destinations	1 220	0.4%	1 633	0.5%	928	0.3%	971	0.3%	654	0.2%	
<b>Total</b>	<b>309 267</b>		<b>359 994</b>		<b>352 669</b>		<b>379 364</b>		<b>274 834</b>		
% change			+ 16%		- 2%		+ 8%		+ 14.2%		

# TRADE

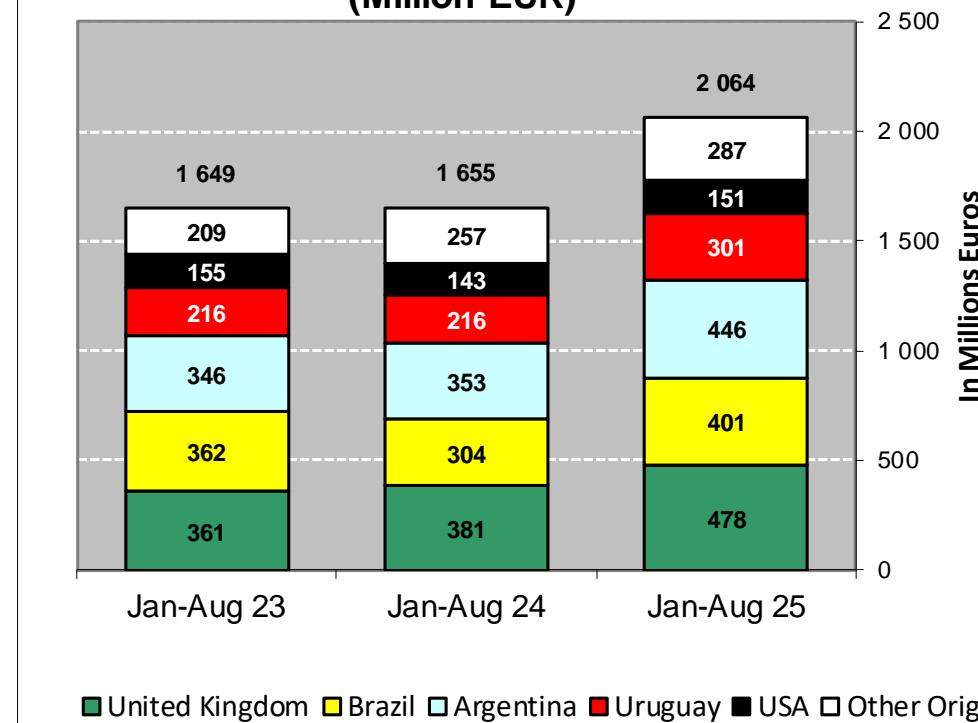
## EU Imports of Beef and Live Animals (Excl Fats) Trade Figures (COMEXT)

### EU IMPORTS

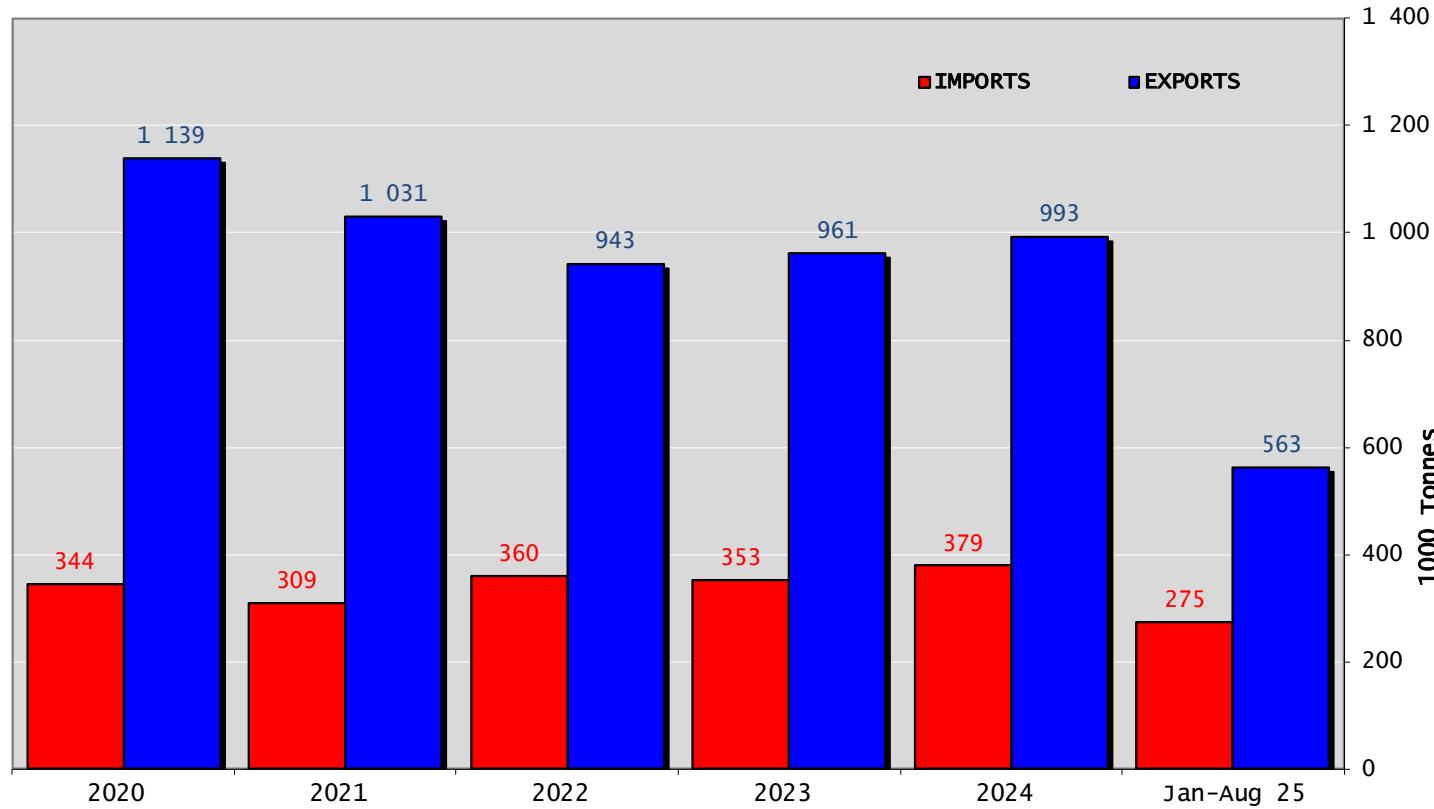
**IMPORTS of Beef & Veal into EU  
(Tonnes cwe)**



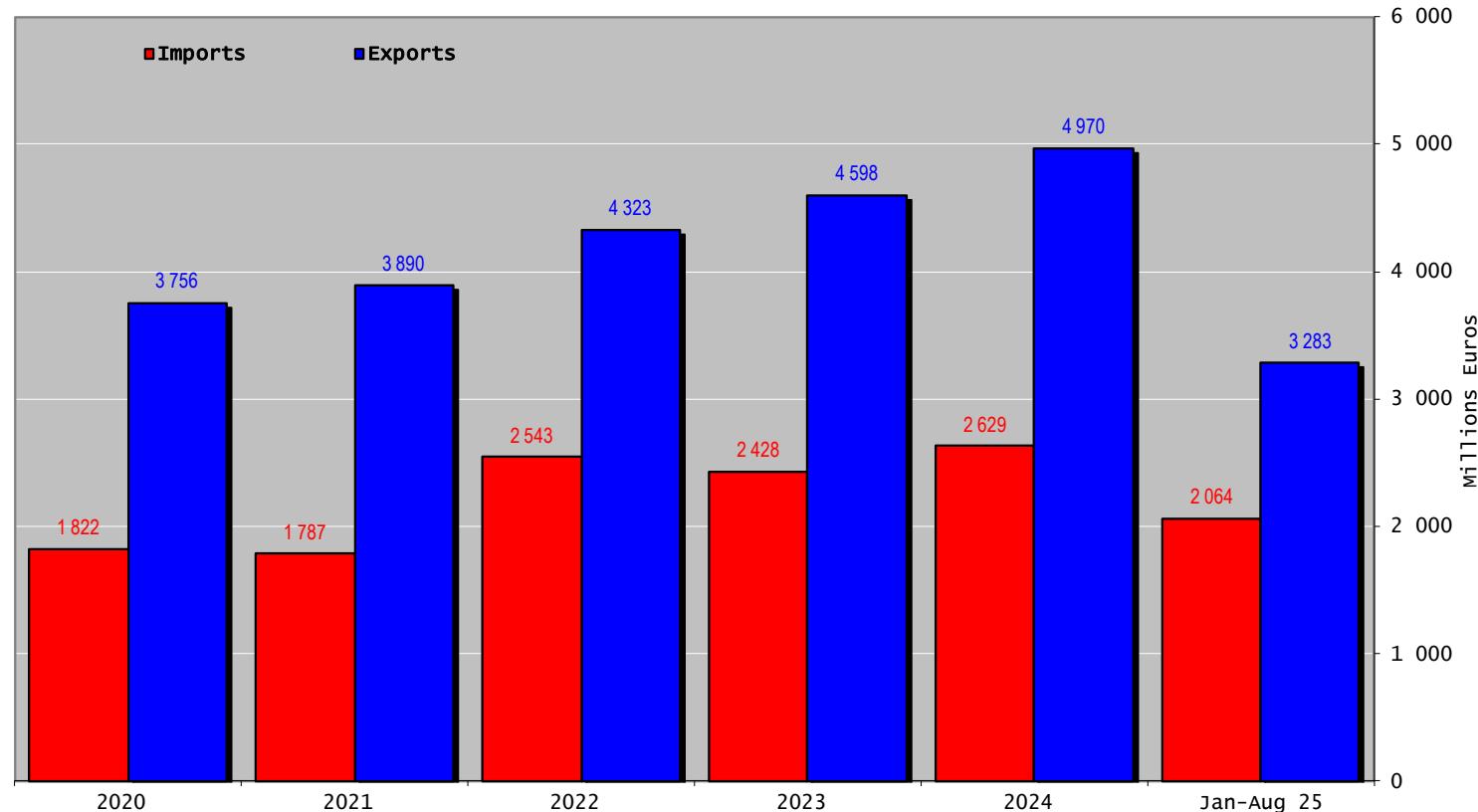
**IMPORTS of Beef & Veal into EU  
(Million EUR)**



## Trade Balance of Beef Products and Live Animals

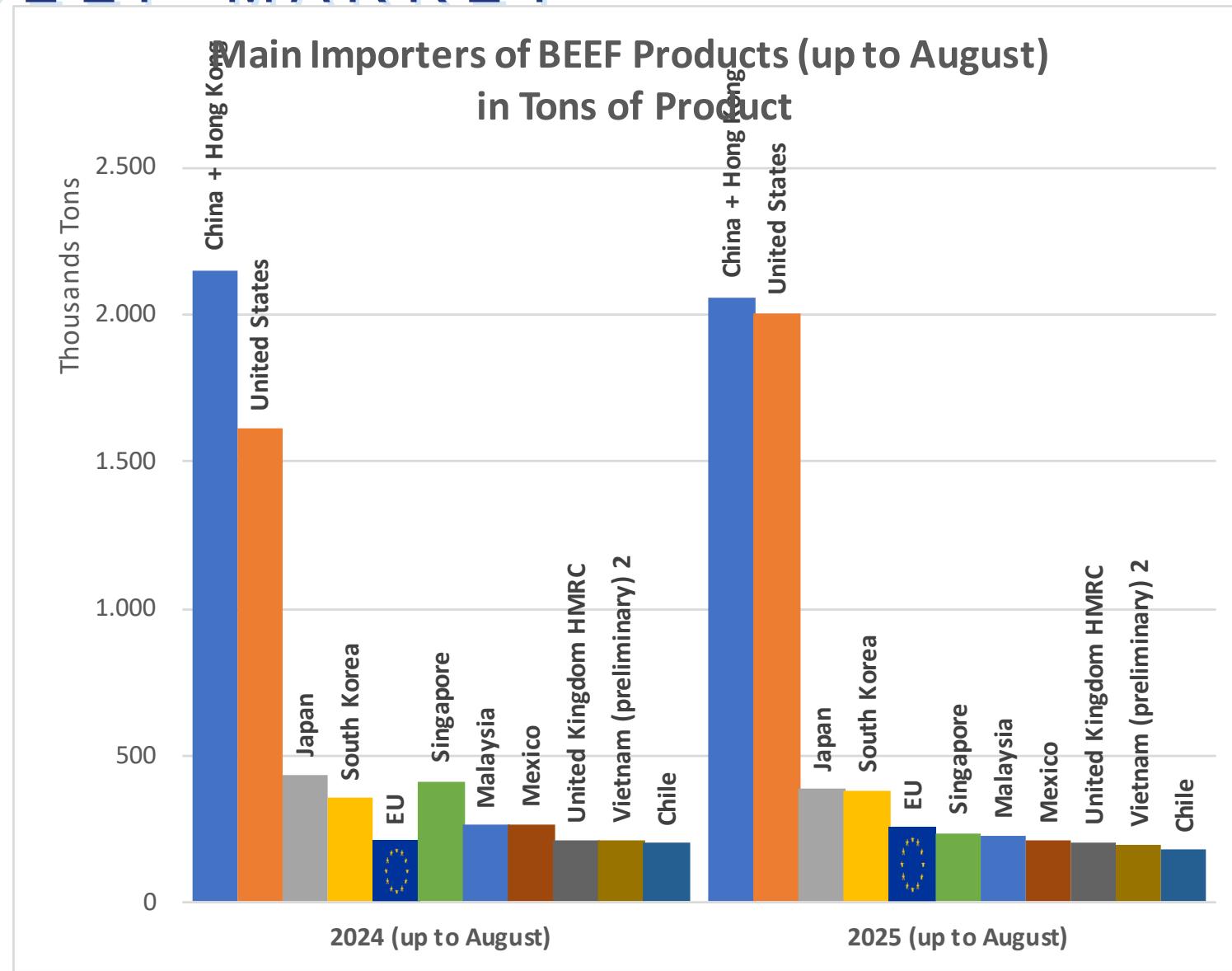


## Trade Balance of Beef Products and Live Animals



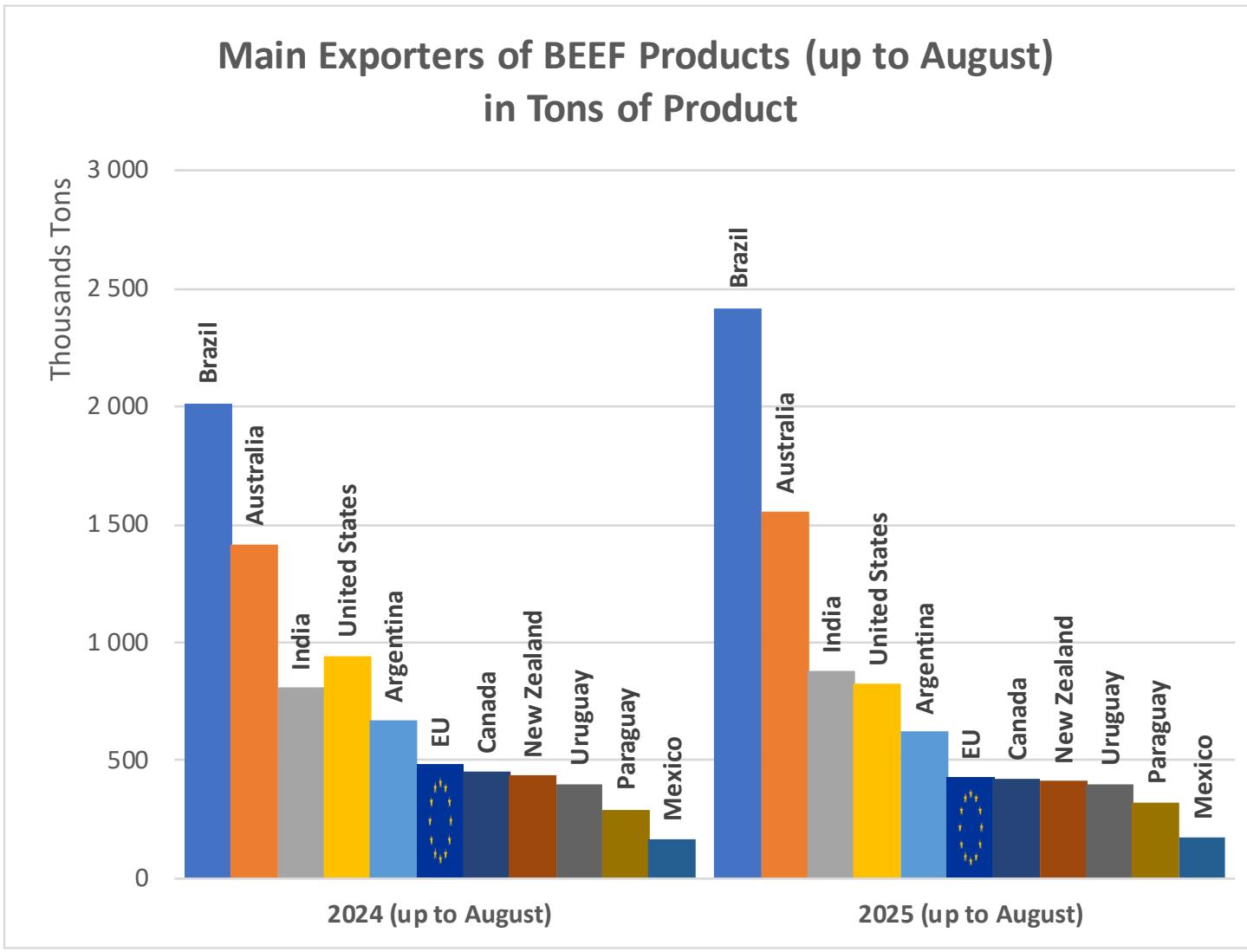
# WORLD BEEF MARKET

## BEEF MAIN IMPORTERS



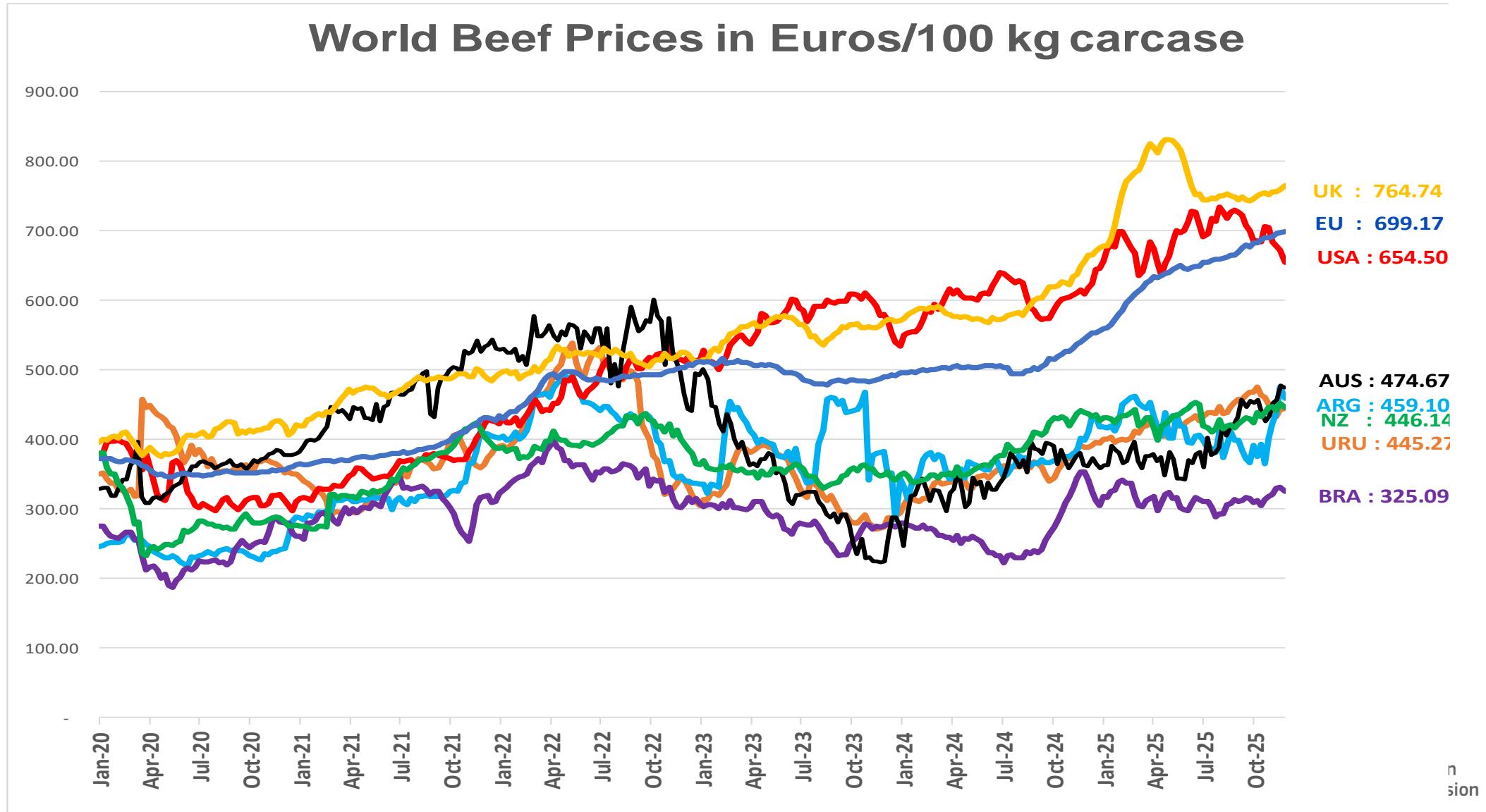
# WORLD BEEF MARKET

## BEEF MAIN EXPORTERS



# WORLD BEEF MARKET

STEER PRICES  
EU, US, AUS, NZ



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/>