

BEEF & VEAL MARKET SITUATION

19 March 2026



LIVESTOCK

DECEMBER SURVEY

Dec 1000 Hd	TOTAL LIVESTOCK				%Var 2025 2024	BOVINE < 1 Year				%Var 2025 2024
	2022	2023	2024	2025		2022	2023	2024	2025	
BE	2 286	2 246	2 153	2 127	-1.2%	694	685	641	641	-0.0%
BG	580	574	559	564	+0.9%	108	107	113	105	-6.7%
CZ	1 390	1 370	1 397	1 390	-0.6%	407	408	421	422	+0.3%
DK	1 466	1 435	1 414	1 400	-1.0%	510	496	491	491	+0.0%
DE	10 997	10 836	10 461	10 420	-0.4%	3 308	3 225	3 109	3 124	+0.5%
EE	250	241	232	234	+0.7%	69	67	63	65	+4.2%
IE	6 552	6 526	6 308	6 284	-0.4%	1 995	1 974	1 922	1 906	-0.9%
EL	582	639	595	567	-4.7%	156	141	150	143	-4.6%
ES	6 455	6 295	6 174	6 300	+2.0%	2 489	2 336	2 325	2 428	+4.4%
FR	16 986	16 807	16 478	16 232	-1.5%	4 868	4 783	4 592	4 570	-0.5%
HR	422	415	422	418	-0.9%	149	145	150	148	-1.3%
IT	6 049	5 999	5 765	5 738	-0.5%	1 563	1 577	1 799	1 640	-8.8%
CY	81	82	83	84	+2.2%	25	25	24	25	+3.3%
LV	391	368	352	350	-0.5%	107	101	96	98	+1.5%
LT	642	624	600	601	+0.2%	173	165	159	166	+4.2%
LU	186	184	181	187	+3.4%	48	46	45	47	+5.2%
HU	894	870	870	883	+1.5%	258	260	254	261	+2.6%
MT	14	14	14			4	4	4		
NL	3 751	3 739	3 562	3 549	-0.4%	1 536	1 518	1 402	1 418	+1.1%
AT	1 861	1 835	1 820	1 815	-0.3%	597	577	579	571	-1.4%
PL	6 448	6 267	6 191	6 142	-0.8%	1 929	1 863	1 849	1 901	+2.8%
PT	1 579	1 528	1 487	1 472	-1.0%	516	492	490	473	-3.4%
RO	1 834	1 815	1 809	1 801	-0.5%	347	336	329	329	+0.1%
SI	465	456	454	456	+0.4%	149	145	143	143	+0.0%
SK	433	430	417			124	119	111		
FI	822	799	764	752	-1.6%	283	274	263	262	-0.6%
SE	1 391	1 369	1 334	1 345	+0.8%	461	452	438	441	+0.7%
EU	74 808	73 761	71 896	71 110	-0.5%	22 872	22 320	21 963	21 818	-0.1%

EU EVOLUTION TOTAL BOVINE

Dec 1000 Hd	BOVINE 1-2 Year				%Var 2025 2024	BOVINE > 2 Year				%Var 2025 2024
	2022	2023	2024	2025		2022	2023	2024	2025	
BE	454	441	427	407	-4.7%	1 138	1 120	1 085	1 080	-0.5%
BG	70	68	70	70	+0.5%	402	399	376	388	+3.2%
CZ	314	304	309	307	-0.5%	669	658	668	660	-1.1%
DK	281	279	271	259	-4.6%	675	661	652	650	-0.3%
DE	2 600	2 572	2 449	2 395	-2.2%	5 089	5 039	4 904	4 902	-0.0%
EE	49	47	44	43	-3.7%	132	128	125	126	+0.6%
IE	1 810	1 805	1 701	1 684	-1.0%	2 746	2 748	2 684	2 695	+0.4%
EL	107	152	130	123	-4.9%	319	346	316	301	-4.7%
ES	785	834	782	836	+6.8%	3 181	3 124	3 067	3 037	-1.0%
FR	2 992	3 003	2 966	2 869	-3.3%	9 127	9 021	8 920	8 793	-1.4%
HR	112	115	114	114	idem	161	155	158	156	-1.3%
IT	1 520	1 517	1 175	1 294	+10.1%	2 966	2 904	2 791	2 804	+0.5%
CY	15	14	15	15	+0.9%	42	43	44	44	+1.9%
LV	66	60	56	55	-1.9%	219	208	200	198	-1.0%
LT	130	131	123	118	-4.1%	339	328	317	317	-0.2%
LU	41	40	38	38	+1.1%	98	98	98	101	+3.4%
HU	159	150	150	158	+5.1%	477	460	466	465	-0.3%
MT	3	3	3			7	7	7		
NL	496	510	477	459	-3.7%	1 719	1 711	1 682	1 671	-0.6%
AT	430	427	415	422	+1.8%	834	832	826	821	-0.5%
PL	1 699	1 518	1 627	1 585	-2.5%	2 821	2 886	2 715	2 656	-2.2%
PT	201	208	200	215	+7.7%	862	828	797	784	-1.7%
RO	228	225	217	217	+0.1%	1 259	1 254	1 264	1 255	-0.7%
SI	130	126	125	129	+3.3%	186	186	186	183	-1.2%
SK	83	85	81			225	225	224		
FI	203	198	186	183	-1.5%	336	327	315	307	-2.4%
SE	333	332	324	323	-0.4%	597	585	572	581	+1.5%
EU	15 308	15 162	14 475	14 319	-0.5%	36 627	36 279	35 458	34 973	-0.7%

Source : EStat Newcronos

EU %Var is calculated considering only countries available in 2024 AND 2025

19 March 2026

LIVESTOCK

DECEMBER SURVEY

EU EVOLUTION COWS

Dec	TOTAL COWS				%Var 2025 2024	DAIRY COWS				%Var 2025 2024	OTHER COWS				%Var 2025 2024
	1000 Hd	2022	2023	2024		2025	2022	2023	2024		2025	2022	2023	2024	
BE	913	894	862	853	-1.0%	544	536	518	523	+0.8%	370	358	343	331	-3.7%
BG	376	371	353	362	+2.5%	213	202	190	185	-2.6%	163	168	164	177	+8.4%
CZ	579	568	580	566	-2.3%	357	358	360	343	-4.8%	223	211	220	224	+1.9%
DK	627	613	606	607	+0.3%	556	547	543	548	+1.0%	70	66	63	59	-5.8%
DE	4 420	4 338	4 210	4 215	+0.1%	3 810	3 713	3 589	3 597	+0.2%	610	625	620	618	-0.4%
EE	114	112	110	112	+1.7%	84	83	83	85	+2.3%	31	29	27	27	-0.3%
IE	2 372	2 329	2 249	2 241	-0.4%	1 510	1 511	1 481	1 490	+0.6%	862	819	768	751	-2.2%
EL	227	254	232	221	-4.6%	81	88	80	76	-4.7%	147	166	152	145	-4.5%
ES	2 888	2 841	2 785	2 763	-0.8%	810	786	774	761	-1.6%	2 078	2 055	2 011	2 001	-0.5%
FR	7 020	6 904	6 755	6 615	-2.1%	3 231	3 165	3 075	2 984	-3.0%	3 790	3 740	3 679	3 631	-1.3%
HR	138	131	130	128	-1.5%	79	71	71	71	idem	59	60	59	57	-3.4%
IT	2 348	2 289	2 224	2 232	+0.4%	1 865	1 808	1 764	1 771	+0.4%	483	481	460	461	+0.2%
CY	38	39	40	41	+1.4%	38	39	39	40	+2.6%	0	0	1	1	-36.2%
LV	191	181	175	174	-0.5%	128	119	113	112	-1.3%	63	62	62	62	+1.0%
LT	291	281	268	267	-0.4%	224	212	201	198	-1.2%	67	69	67	69	+2.1%
LU	77	77	77	79	+3.3%	55	55	55	58	+5.2%	22	22	22	21	-1.5%
HU	421	406	410	409	-0.0%	278	266	268	267	-0.5%	143	140	141	142	+0.8%
MT	6	6	6			6	6	6			0	0	0		
NL	1 614	1 597	1 571	1 560	-0.7%	1 570	1 552	1 527	1 518	-0.6%	44	45	43	41	-3.6%
AT	708	700	690	686	-0.6%	551	543	536	536	+0.1%	158	157	155	150	-2.9%
PL	2 172	2 396	2 101	2 091	-0.5%	2 037	2 243	1 960	1 946	-0.7%	135	152	141	145	+3.0%
PT	715	690	675	664	-1.5%	222	219	214	211	-1.1%	493	471	461	453	-1.7%
RO	1 112	1 098	1 098	1 088	-0.9%	1 076	1 057	1 052	1 043	-0.9%	36	41	46	46	+0.2%
SI	158	155	153	151	-1.1%	93	95	92	89	-3.4%	64	60	61	62	+2.5%
SK	190	188	187			117	115	114			73	73	73		
FI	306	299	288	283	-1.6%	243	236	228	225	-1.5%	63	62	59	58	-2.1%
SE	496	484	472	480	+1.7%	298	289	289	294	+1.9%	199	195	184	186	+1.3%
EU	30 519	30 240	29 305	28 889	-0.8%	20 074	19 912	19 222	18 969	-0.7%	10 445	10 328	10 082	9 920	-0.9%

Source : EStat Newcronos

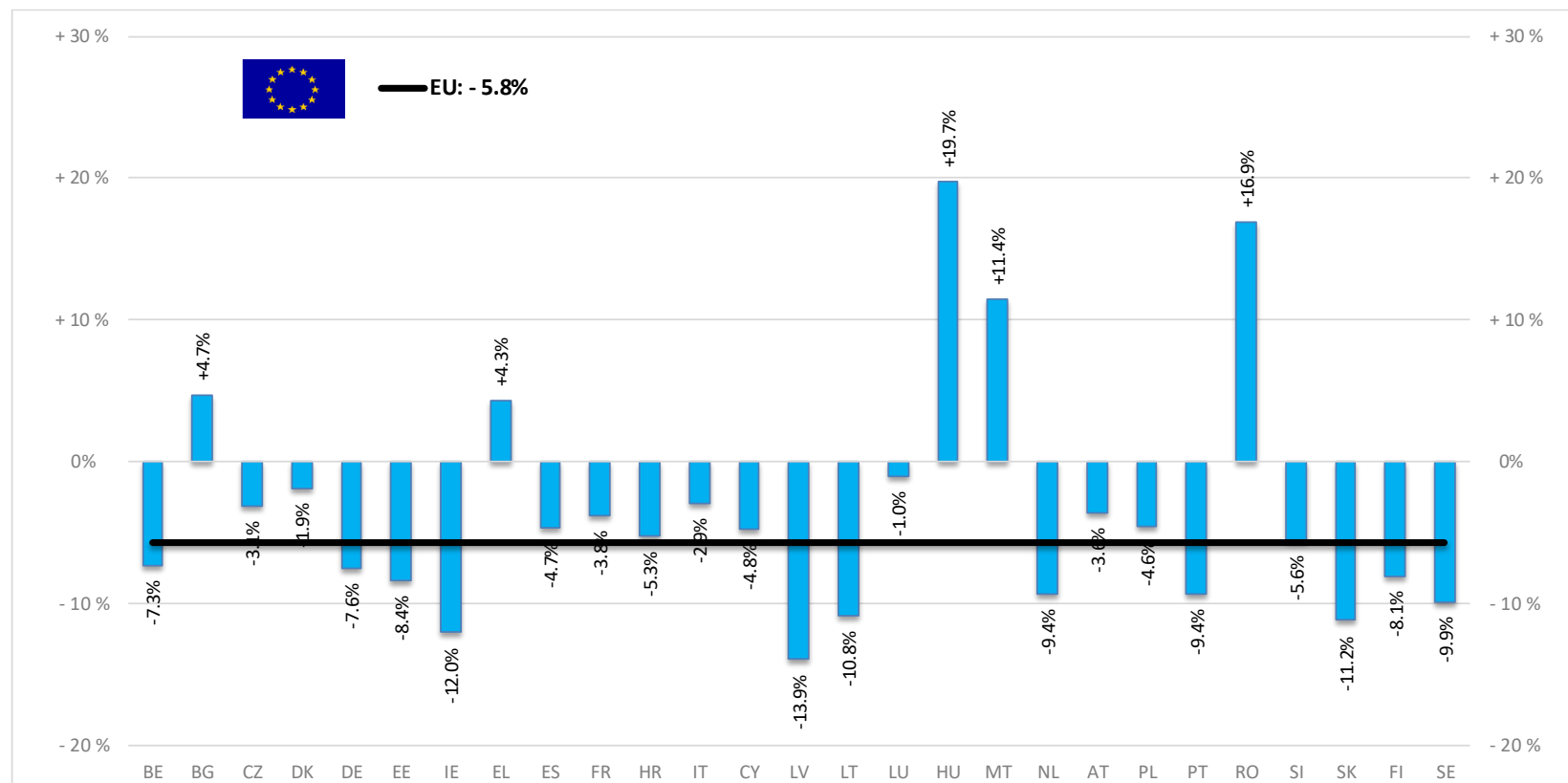
EU %Var is calculated considering only countries available in 2024 AND 2025

PRODUCTION

% EVOLUTION HEADS

HEADS	Jan-Dec 25/24
	EU
Bull	-3.0%
Bullock	-5.8%
Cow	-6.4%
Heifer	-3.3%
Calf	-9.5%
Young cattle	-10.5%
Bovine meat	-5.8%

Estimates for last month of period :



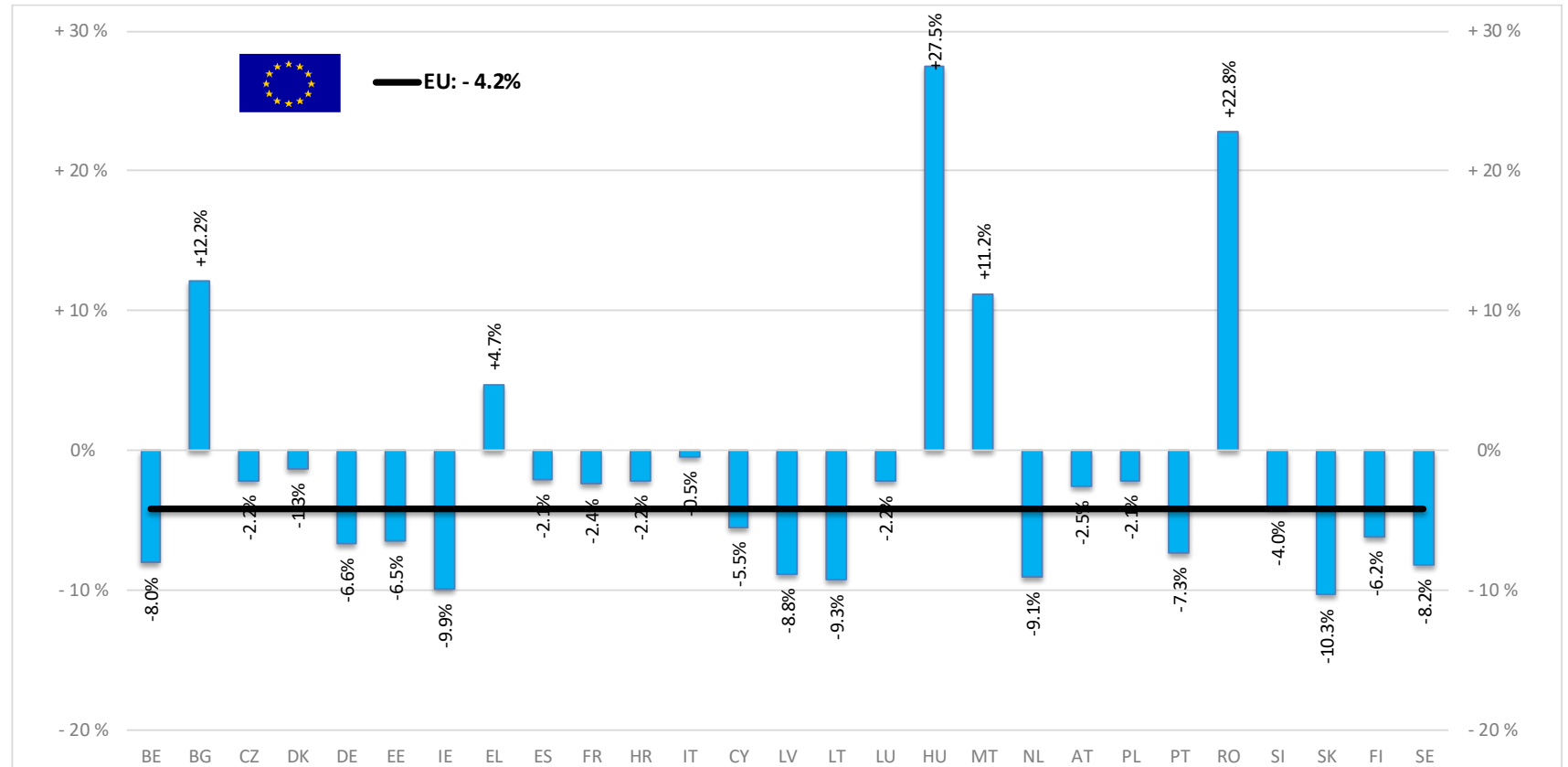
Source : Eurostat - Slaughtering in slaughterhouses - monthly data (apro_mt_pwgtm)

PRODUCTION

% EVOLUTION TONNES

TONS	Jan-Dec 25/24
	EU
Bull	-2.5%
Bullock	-4.1%
Cow	-5.1%
Heifer	-1.4%
Calf	-8.6%
Young cattle	-11.4%
Bovine meat	-4.2%

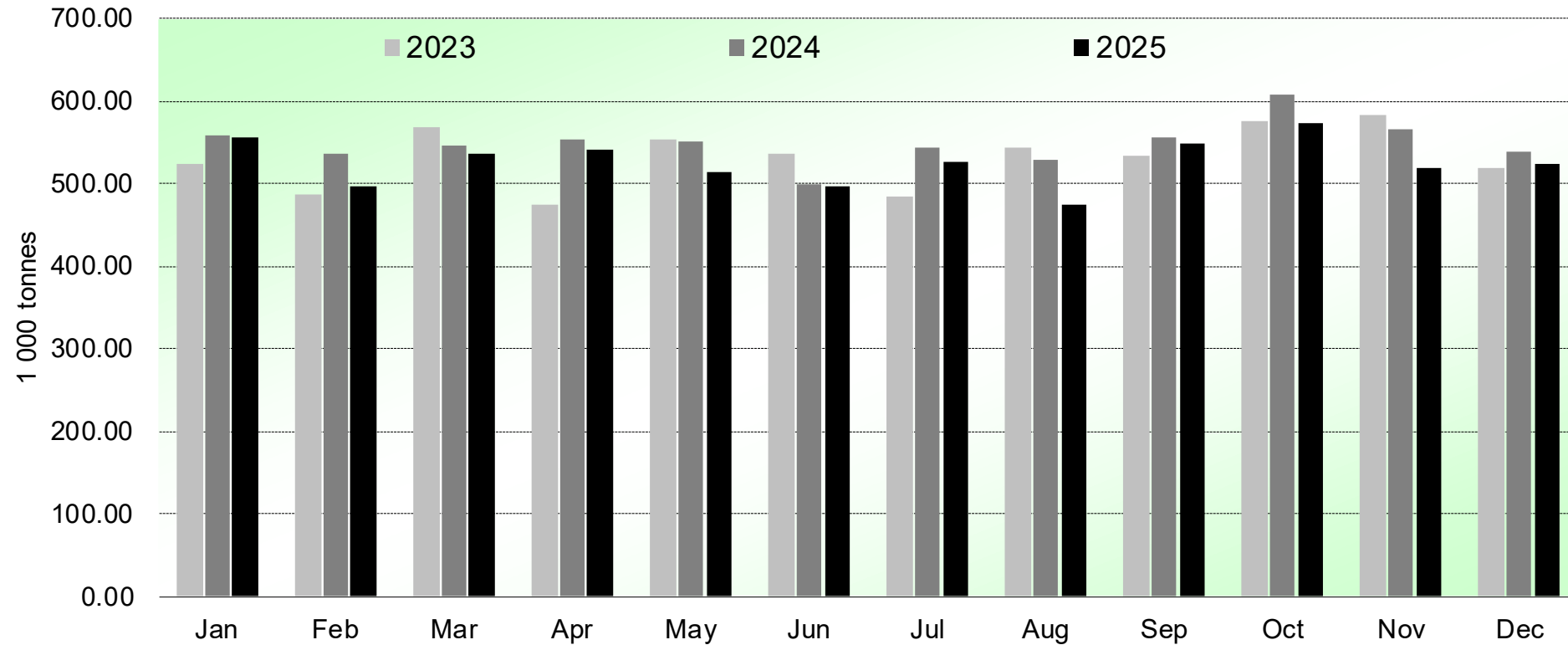
Estimates for last month of period :



PRODUCTION

HISTORIC
TONNES

Beef & Veal Production (EU Slaughtering) - Tonnes



PRICES CARCASSES

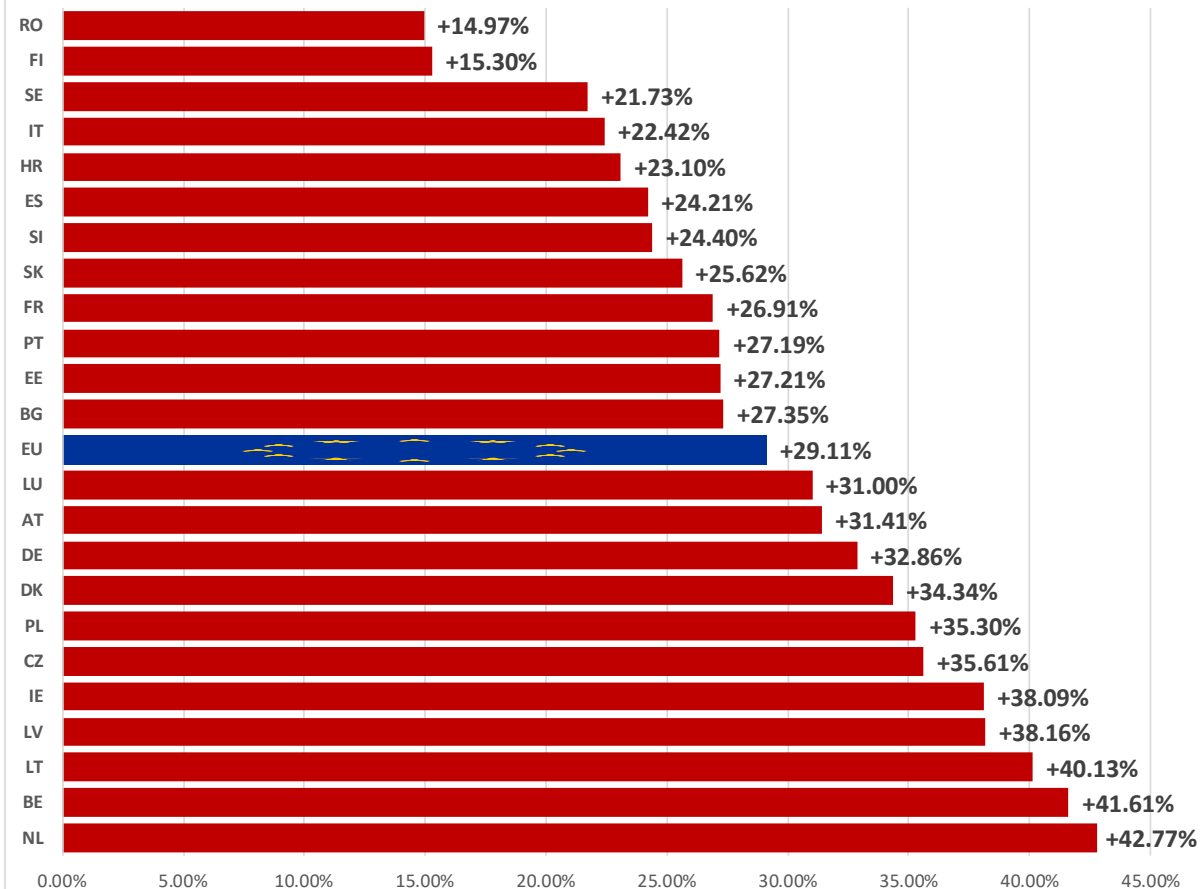
Dashboard

EU Prices week		10	Evolution since last week	Evolution since last month	Evolution since last year	
Carcasse	Average A/C/Z -R3	719.4	€/100 kg	- 0.2%	- 0.7%	+ 15.8%
	Young Bovines (Z)	715.1		+ 0.2%	+ 0.6%	+ 15.7%
	Young Bulls (A)	719.0		- 0.4%	- 1.1%	+ 17.5%
	Steers (C)	719.0		- 1.1%	- 1.5%	+ 6.3%
	Cows (D)	622.7		+ 0.3%	+ 0.9%	+ 20.4%
	Heifers (E)	737.0		+ 0.1%	+ 0.0%	+ 21.0%
	Calves slaughtered <8M	876.4		- 0.5%	+ 0.3%	+ 17.1%
Live Animals	Male Calves Dairy Type	283.4	€/head	+ 6.9%	+ 12.1%	+ 50.1%
	Male Calves Beef Type	474.5		+ 2.4%	+ 7.7%	+ 43.7%
	Young Store Cattle	5.60		+ 0.8%	+ 1.0%	+ 25.7%
	Yearling Male Store Cattle	6.44	€/kg	+ 2.6%	+ 2.9%	+ 20.8%
	Yearling Female Store Cattle	5.35		+ 1.4%	+ 1.3%	+ 34.4%

PRICES CARCASSES

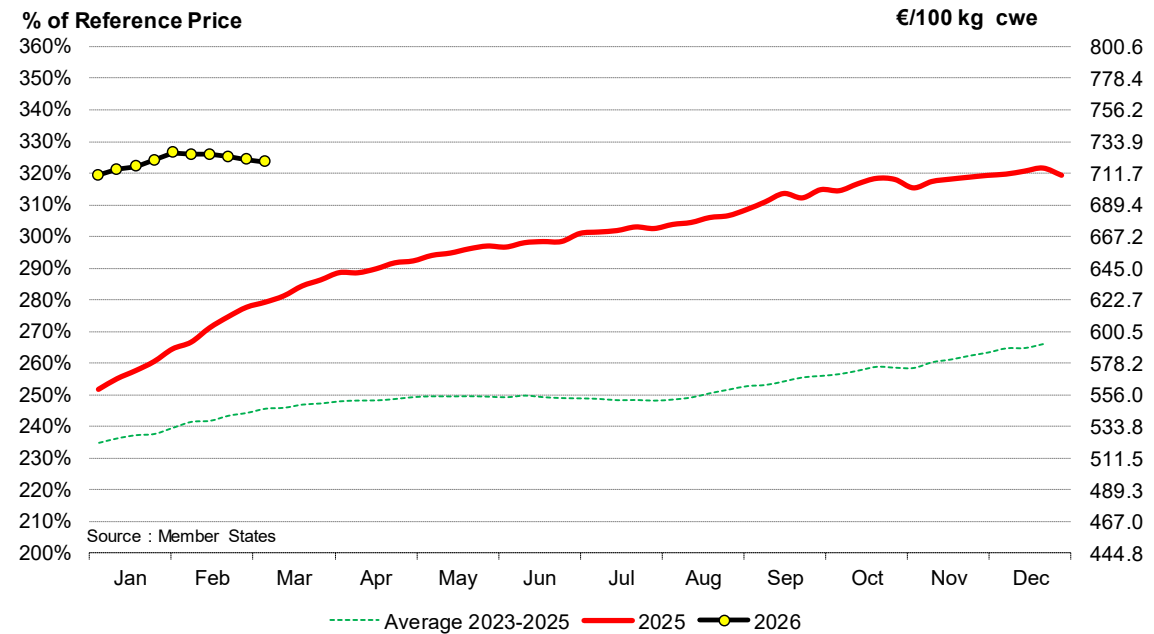
EU EVOLUTION A/C/Z.R3

EU ACZ R3 Price Comparison between average monthly price
March 2025 - February 2026 compared to March 2024 -
February 2025



ACZ - R 3 > Week 10 2026

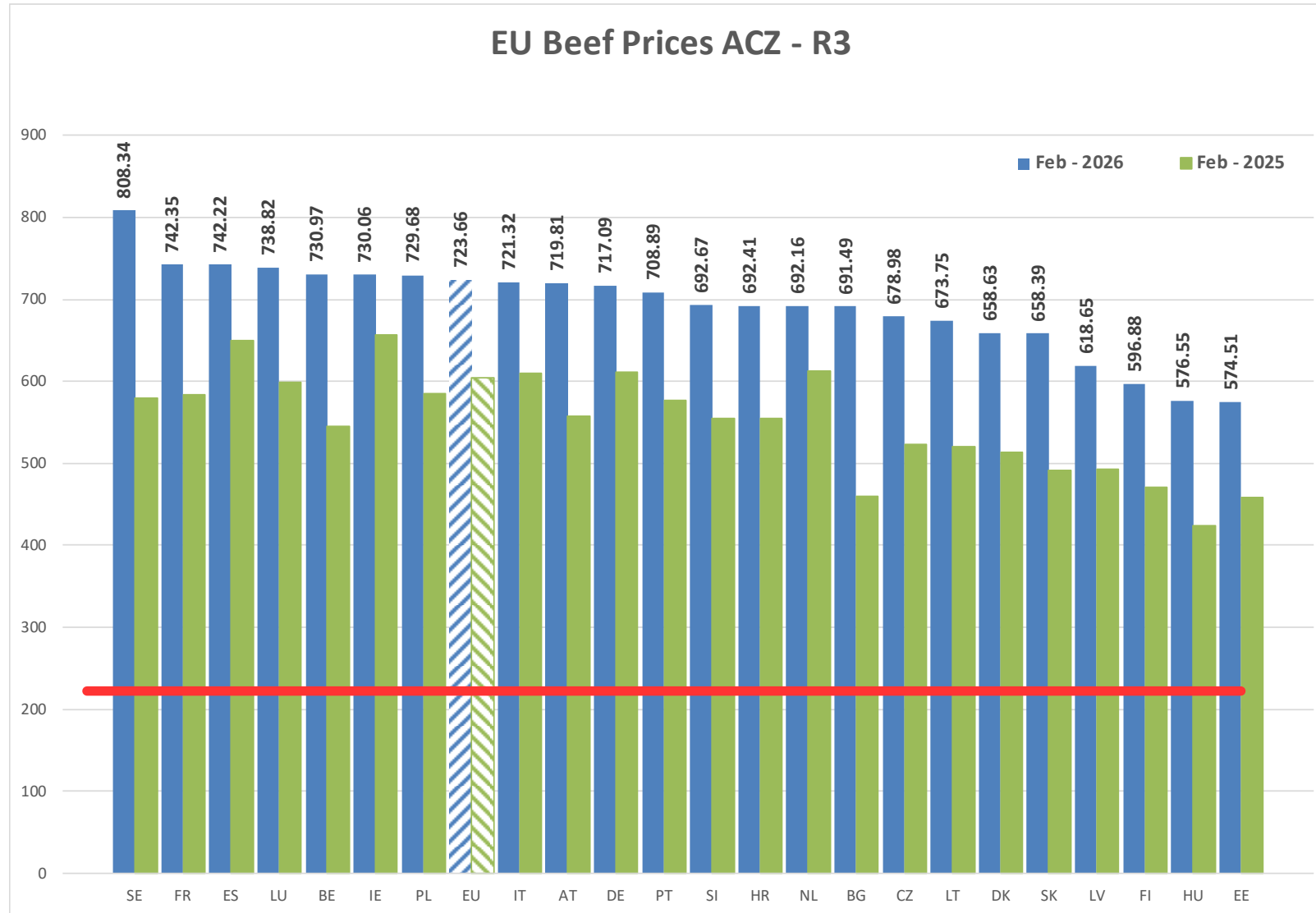
Male bovines carcasses ACZ - R 3 > Week 10 2026



Price in week 10	733.59	Average price in February 2026	723.66
% change y/y :	+ 15.3%	% change y/y :	+19.8%
% of ref. price in week 10	323.5%		

PRICES CARCASSES

EU EVOLUTION A/C/Z.R3



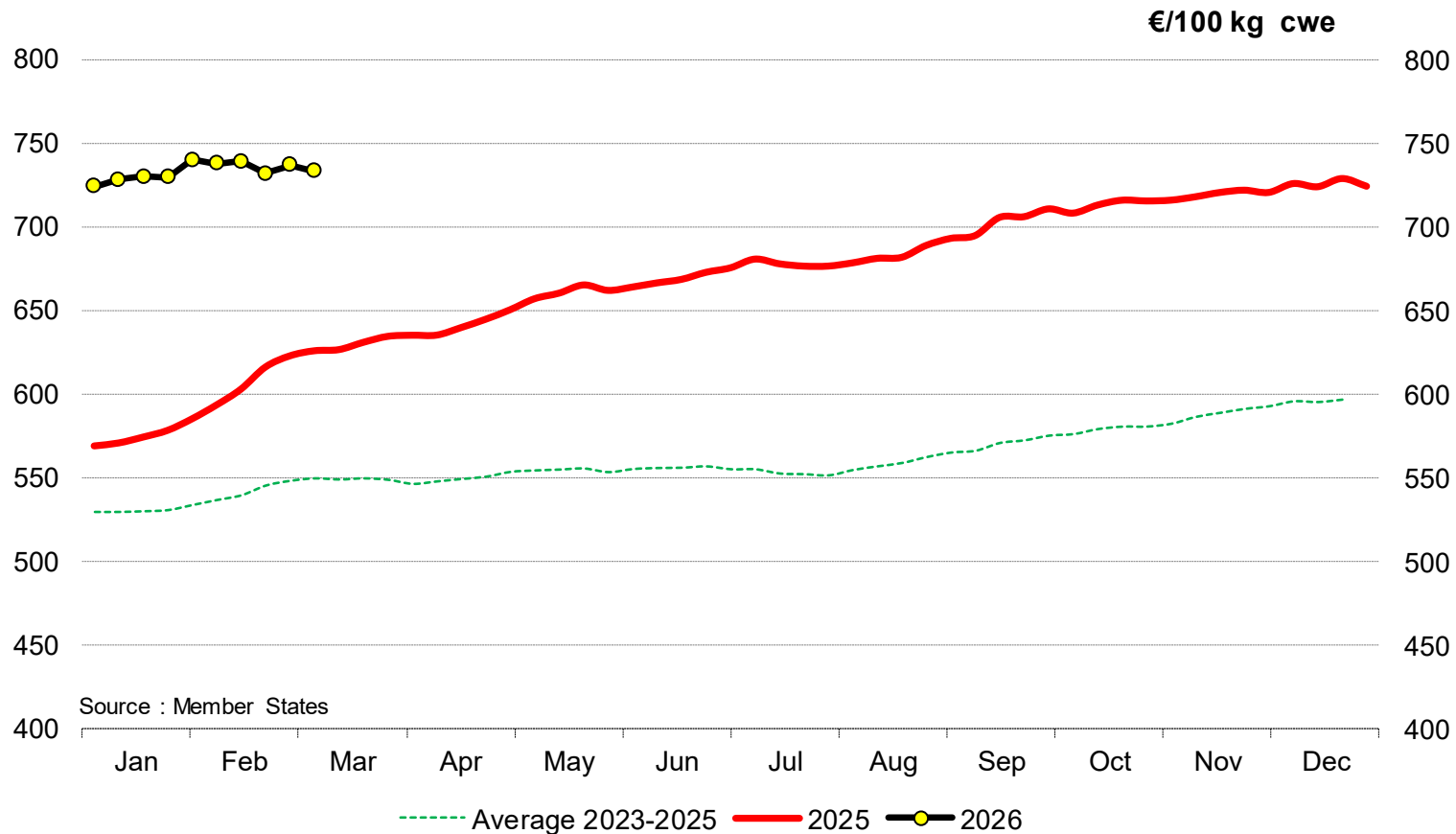
19 March 2026

PRICES CARCASSES

EU EVOLUTION YOUNG BULL – A.R3

A - R 3 > Week 10 2026

Young bovines A - R 3 > Week 10 2026



Price in week 10 **733.59**
% change y/y : **+14.6%**

Average price in February 2026 **736.66**
% change y/y : **+91.3%**

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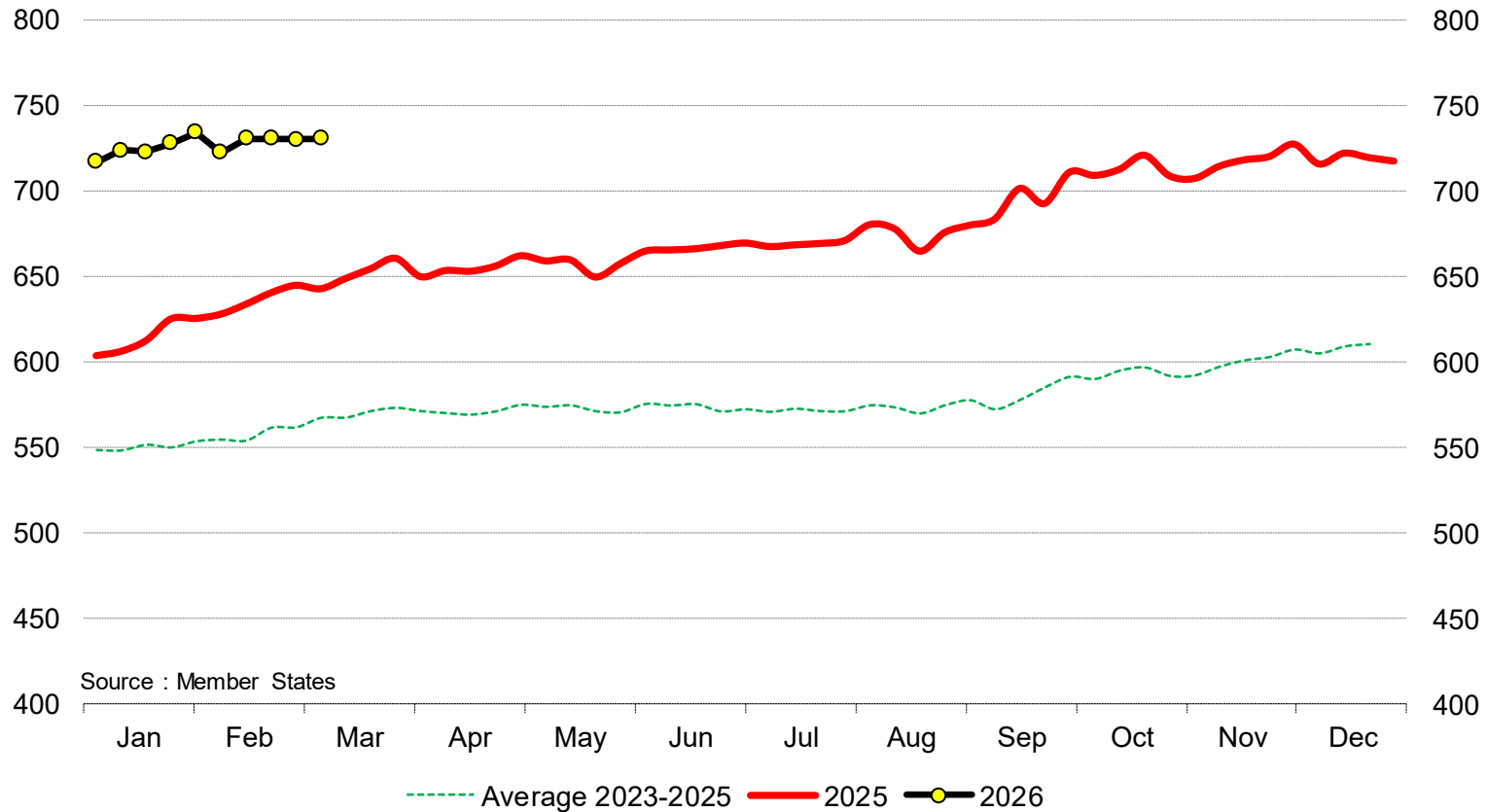
PRICES CARCASSES

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

Z - R 3 > Week 10 2026

Young bovines 8-12 months Z - R 3 > Week 10 2026

€/100 kg cwe



Source : Member States

Price in week 10 **730.84**

% change y/y : **+ 12.0%**

Average price in February 2026 **728.63**

% change y/y : **+14.6%**

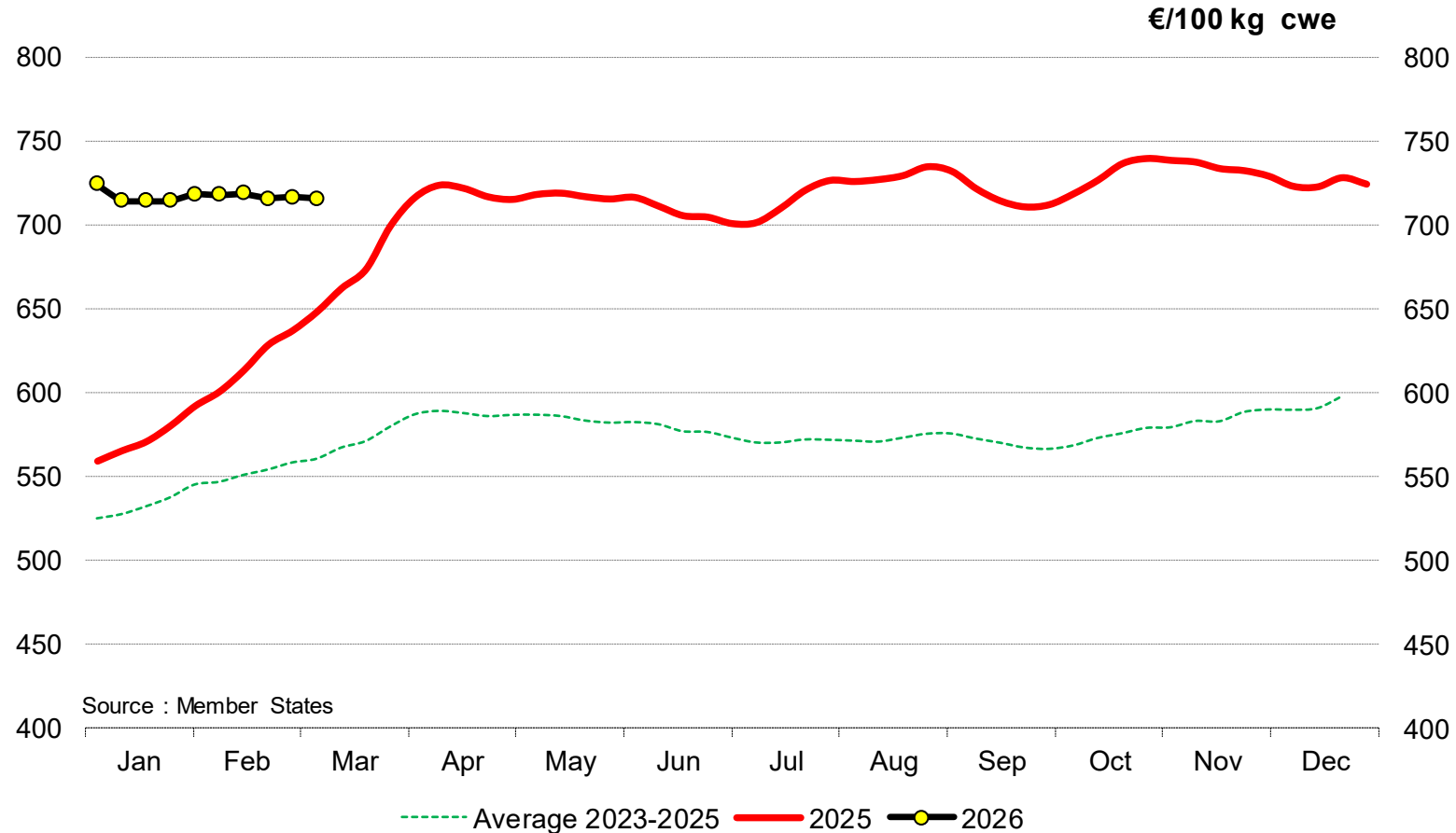
19 March 2026

PRICES CARCASSES

E.U. EVOLUTION STEER – C.R3

C - R 3 > Week 10 2026

Bullocks C - R 3 > Week 10 2026



Price in week 10 **715.66**
% change y/y : **+9.4%**

Average price in February 2026 **759.40**
% change y/y : **+48.3%**

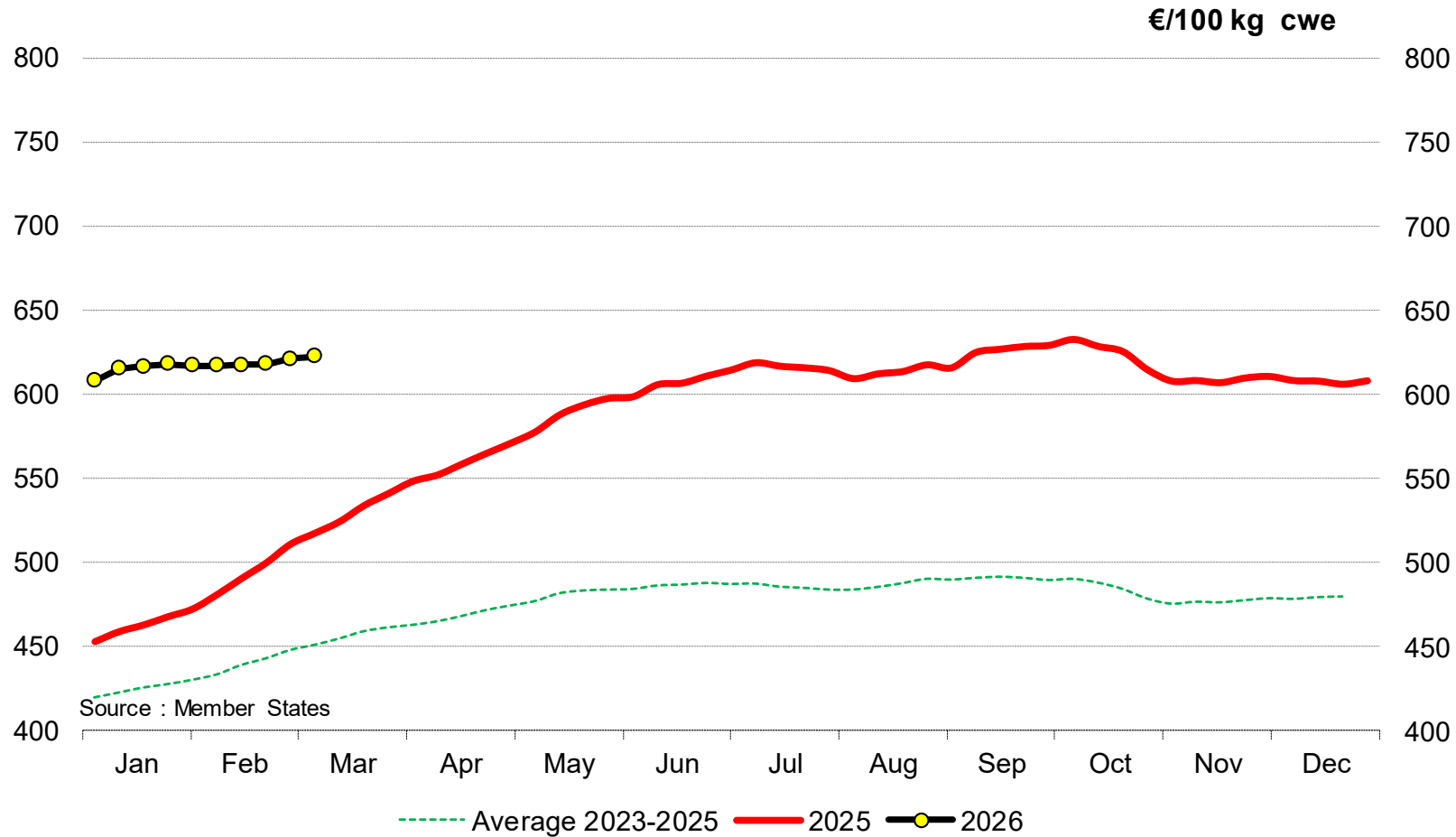
19 March 2026

PRICES CARCASSES

E.U. EVOLUTION COW – D.03

D - O 3 > Week 10 2026

Cows D - O 3 > Week 10 2026



Price in week 10 **622.70**

% change y/y : **+ 16.9%**

Average price in February 2026 **618.25**

% change y/y : **+44.0%**

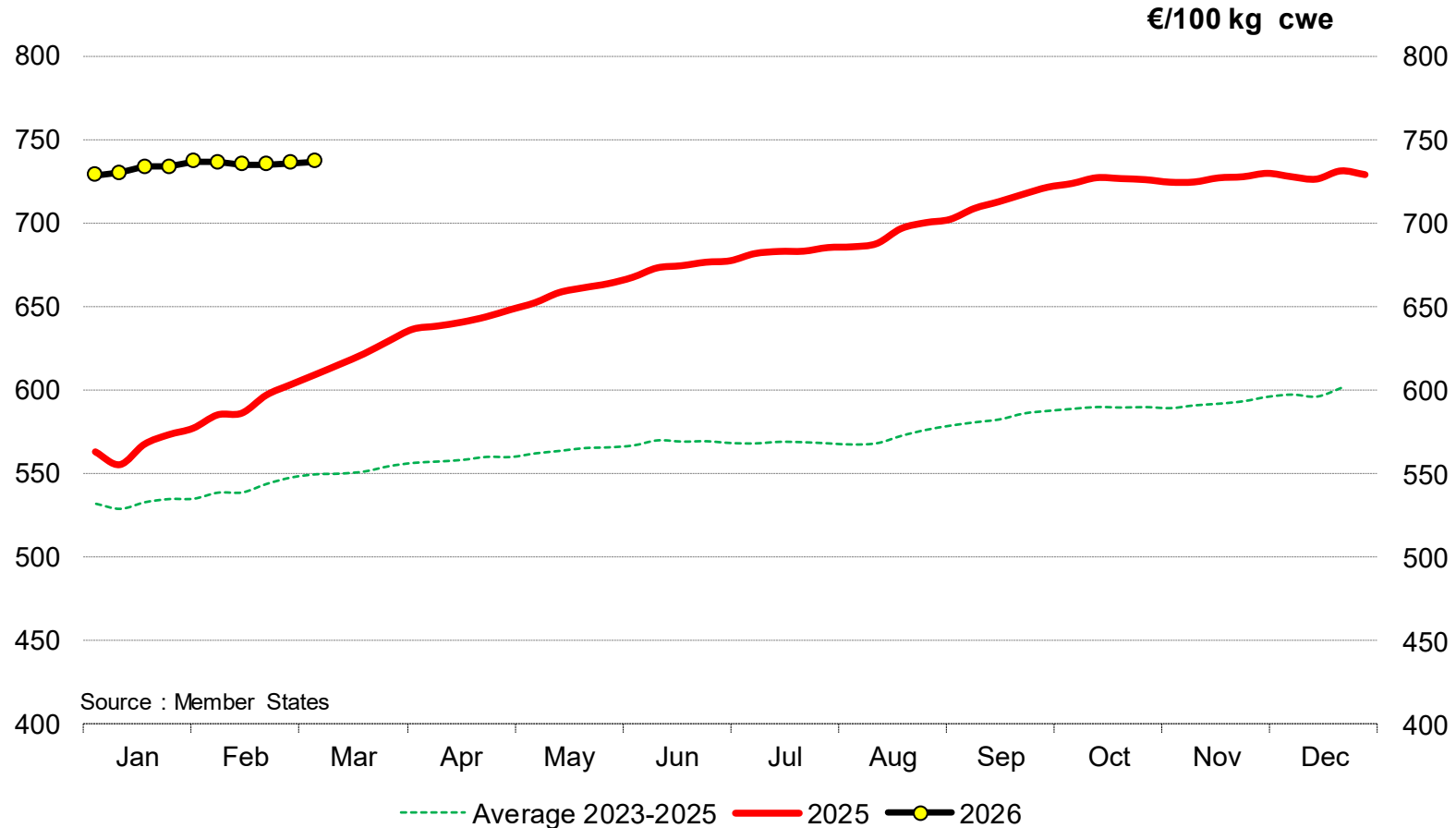
19 March 2026

PRICES CARCASSES

EU EVOLUTION HEIFER – E.R3

E - R 3 > Week 10 2026

Cows E - R 3 > Week 10 2026



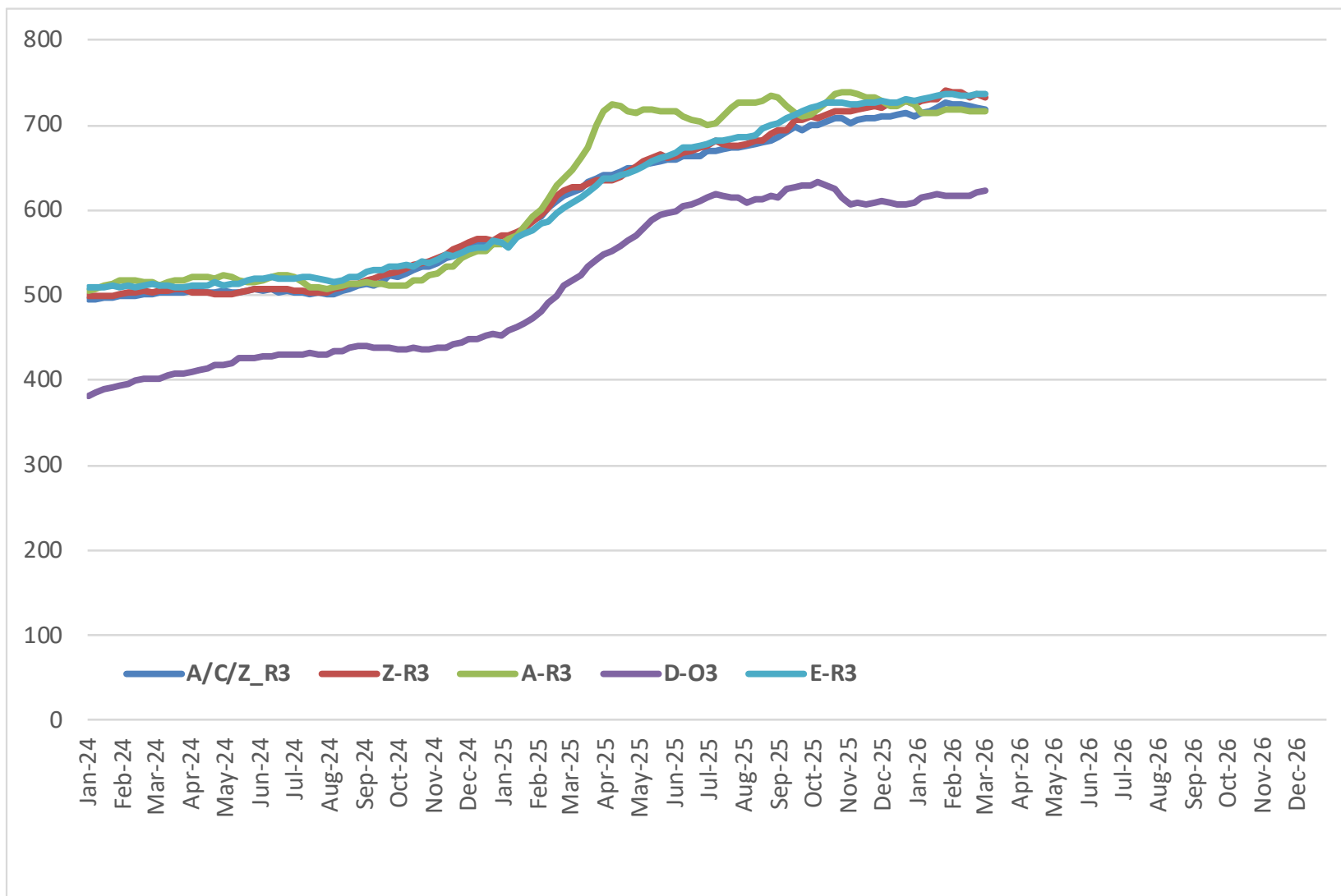
Price in week 10 **737.00**
% change y/y : **+ 17.3%**

Average price in February 2026 **740.38**
% change y/y : **+46.1%**

19 March 2026

PRICES CARCASSES

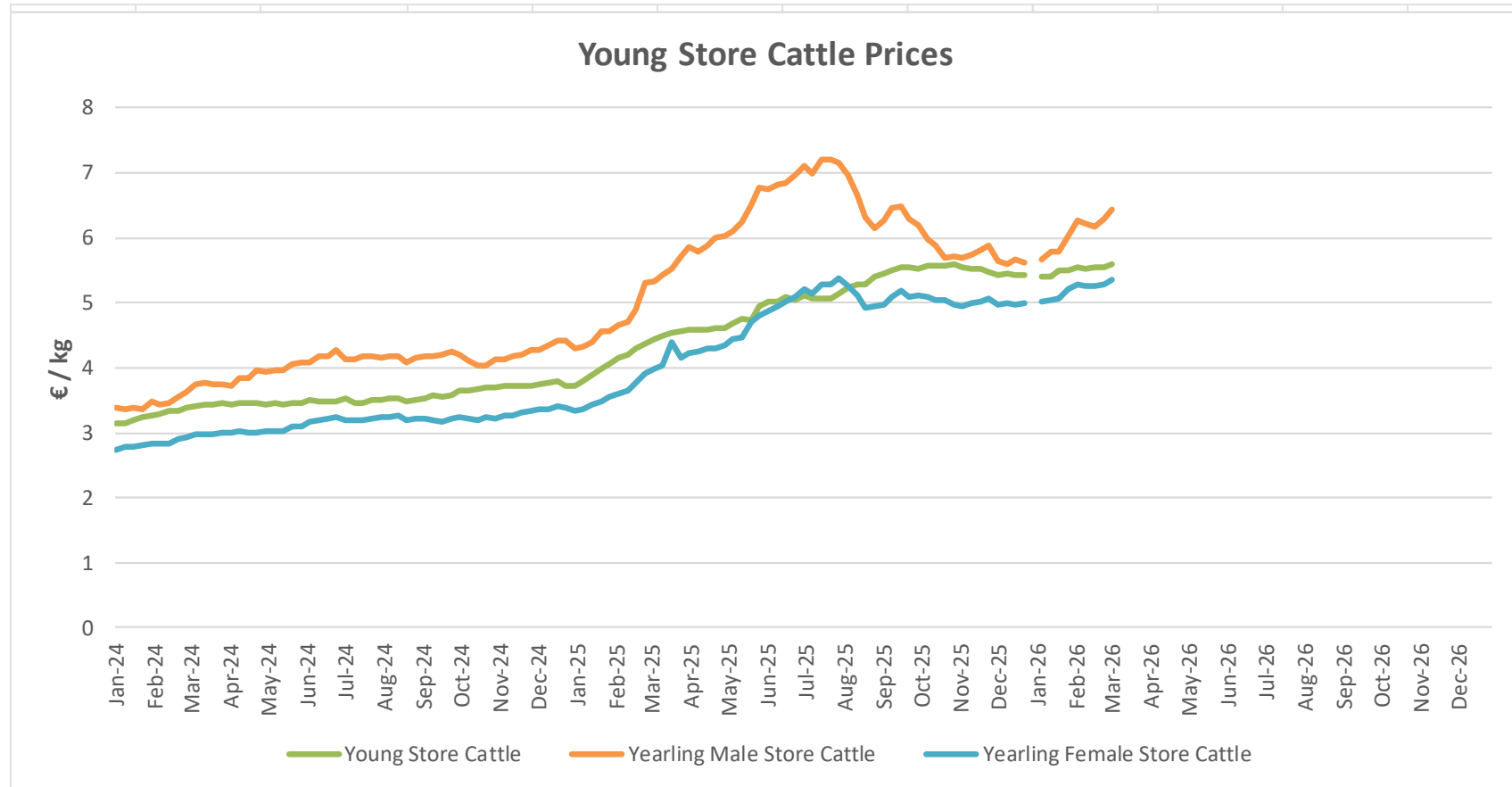
EU EVOLUTION ALL CAT GLOBAL VIEW



19 March 2026

PRICES LIVE BOVINES

EU EVOLUTION STORE CATTLE



Young Store Cattle

Price in week 10 **5.60**

% change y/y : +25.7%

Yearling Female Store Cattle

Price in week 10 **5.35**

% change y/y : +34.4%

Yearling Male Store Cattle

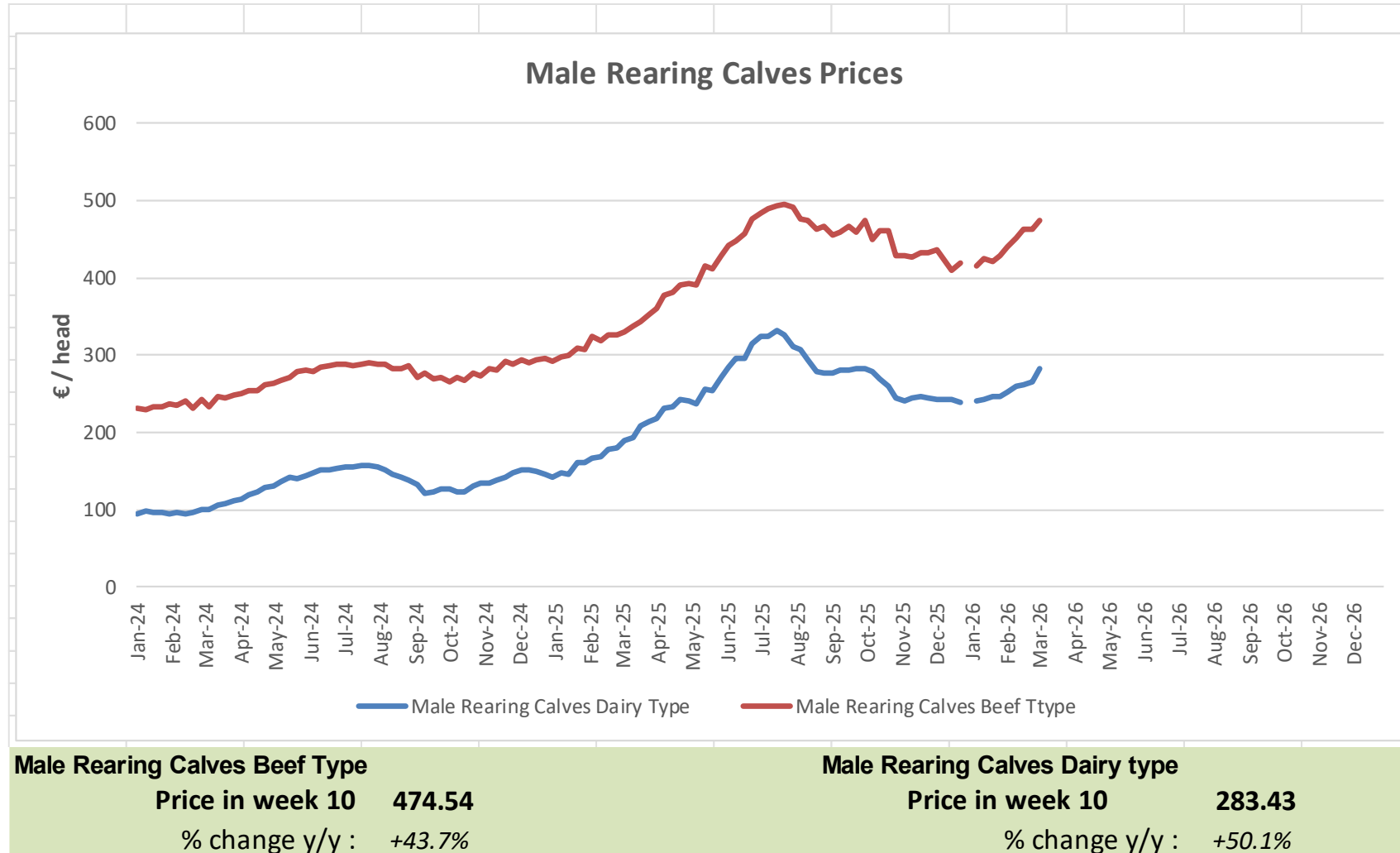
Price in week 10 **6.44**

% change y/y : +20.8%

19 March 2026

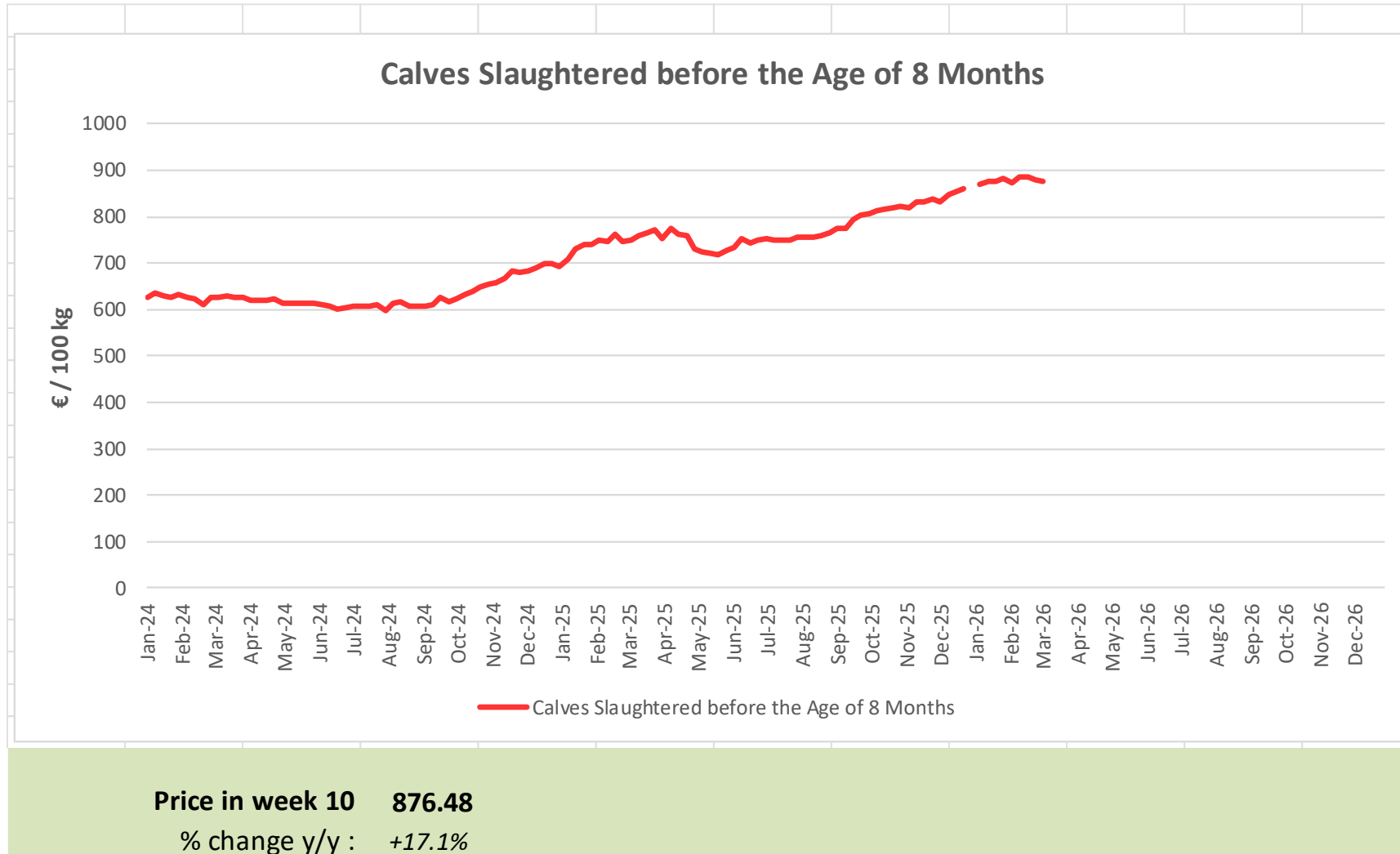
PRICES LIVE BOVINES

EU EVOLUTION Male Calves – 8D4W



PRICES LIVE BOVINES

EU EVOLUTION Butcher Calves



TRADE

EU EXPORTS

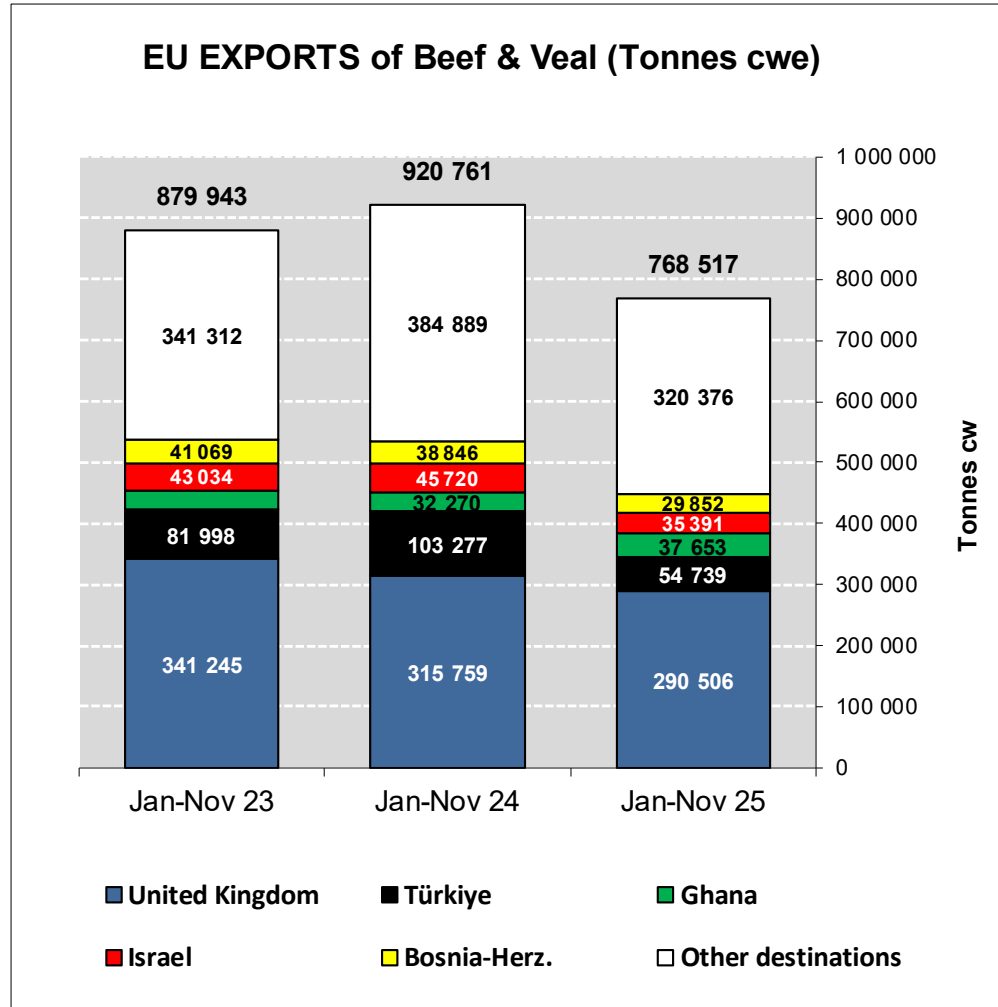
Beef & Live Animals

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

Destinations	2021		2022		2023		2024		Jan-Nov 25		Compared to Jan-Nov 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	344 633	33.4%	366 323	39.0%	368 953	38.6%	343 684	34.5%	290 506	37.8%	- 8.0%
Türkiye	14 953	1.5%	13 337	1.4%	88 657	9.3%	109 068	10.9%	54 739	7.1%	- 47.0%
Ghana	47 618	4.6%	32 171	3.4%	33 889	3.5%	35 125	3.5%	37 653	4.9%	+ 16.7%
Israel	66 022	6.4%	63 618	6.8%	45 146	4.7%	50 633	5.1%	35 391	4.6%	- 22.6%
Bosnia-Herz.	40 504	3.9%	38 796	4.1%	45 285	4.7%	42 007	4.2%	29 852	3.9%	- 23.2%
Ivory Coast	29 187	2.8%	29 882	3.2%	30 208	3.2%	28 129	2.8%	29 589	3.9%	+ 16.1%
Switzerland	28 717	2.8%	24 959	2.7%	19 376	2.0%	23 563	2.4%	29 209	3.8%	+ 32.1%
Algeria	24 111	2.3%	25 459	2.7%	11 905	1.2%	30 687	3.1%	28 842	3.8%	+ 2.5%
Morocco	11 868	1.2%	8 273	0.9%	25 612	2.7%	35 395	3.5%	24 045	3.1%	- 21.4%
Kosovo	16 478	1.6%	17 018	1.8%	22 684	2.4%	26 606	2.7%	18 279	2.4%	- 24.3%
Canada	20 670	2.0%	19 986	2.1%	15 907	1.7%	17 556	1.8%	13 505	1.8%	- 16.2%
Lebanon	19 527	1.9%	21 026	2.2%	21 627	2.3%	20 502	2.1%	11 509	1.5%	- 42.8%
Hong Kong	44 769	4.3%	10 570	1.1%	21 689	2.3%	17 330	1.7%	10 232	1.3%	- 37.0%
Norway	18 235	1.8%	12 903	1.4%	5 310	0.6%	4 199	0.4%	8 722	1.1%	+ 120.7%
Ukraine	15 078	1.5%	11 969	1.3%	10 064	1.1%	10 770	1.1%	8 707	1.1%	- 11.7%
Philippines	9 863	1.0%	29 924	3.2%	18 332	1.9%	21 585	2.2%	8 422	1.1%	- 59.3%
Other Destinations	278 744	27.0%	212 554	22.6%	172 324	18.0%	180 735	18.1%	129 316	16.8%	
Total	1 030 978		938 770		956 969		997 574		768 517		
% change			- 9%		+ 2%		+ 4%		- 16.5%		

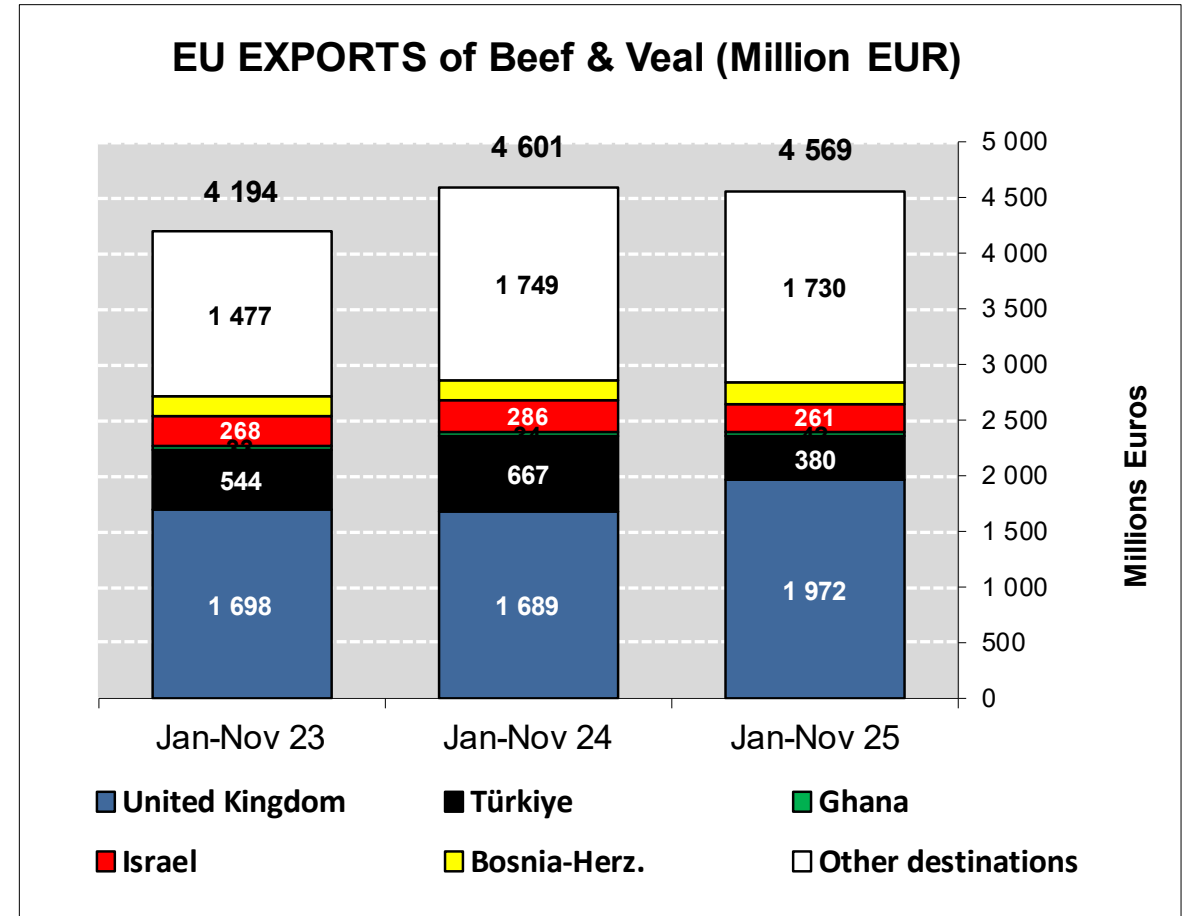
TRADE

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

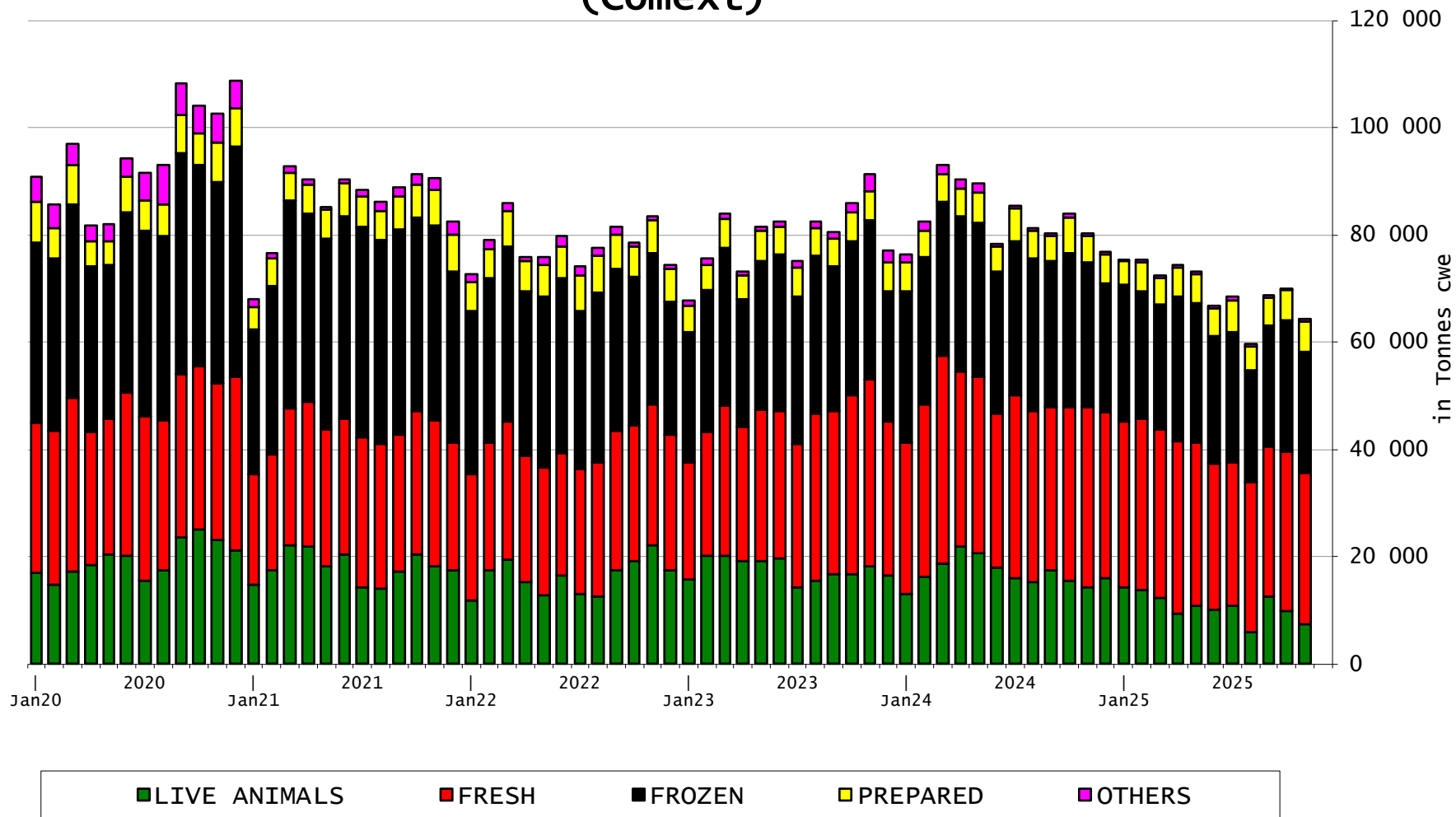


EU EXPORTS

Beef & Live Animals (Excl Fats)

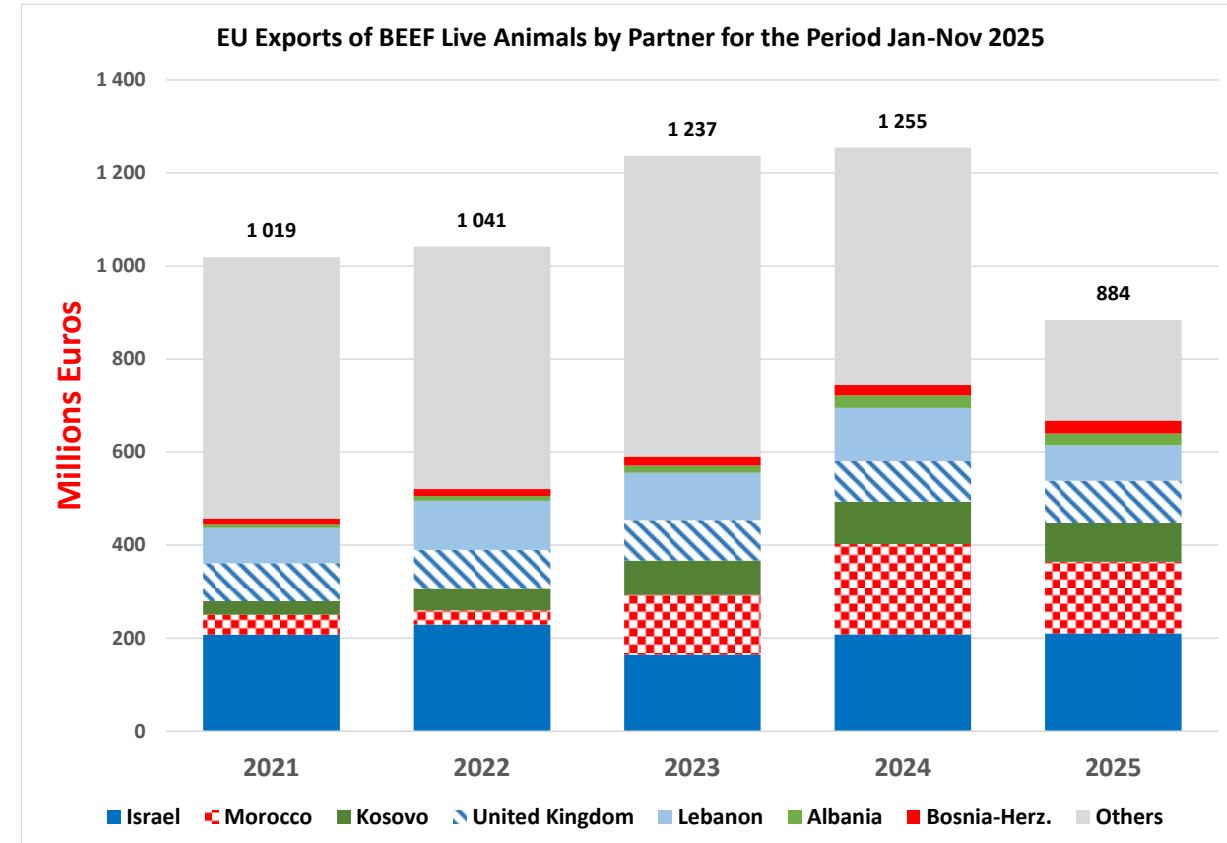
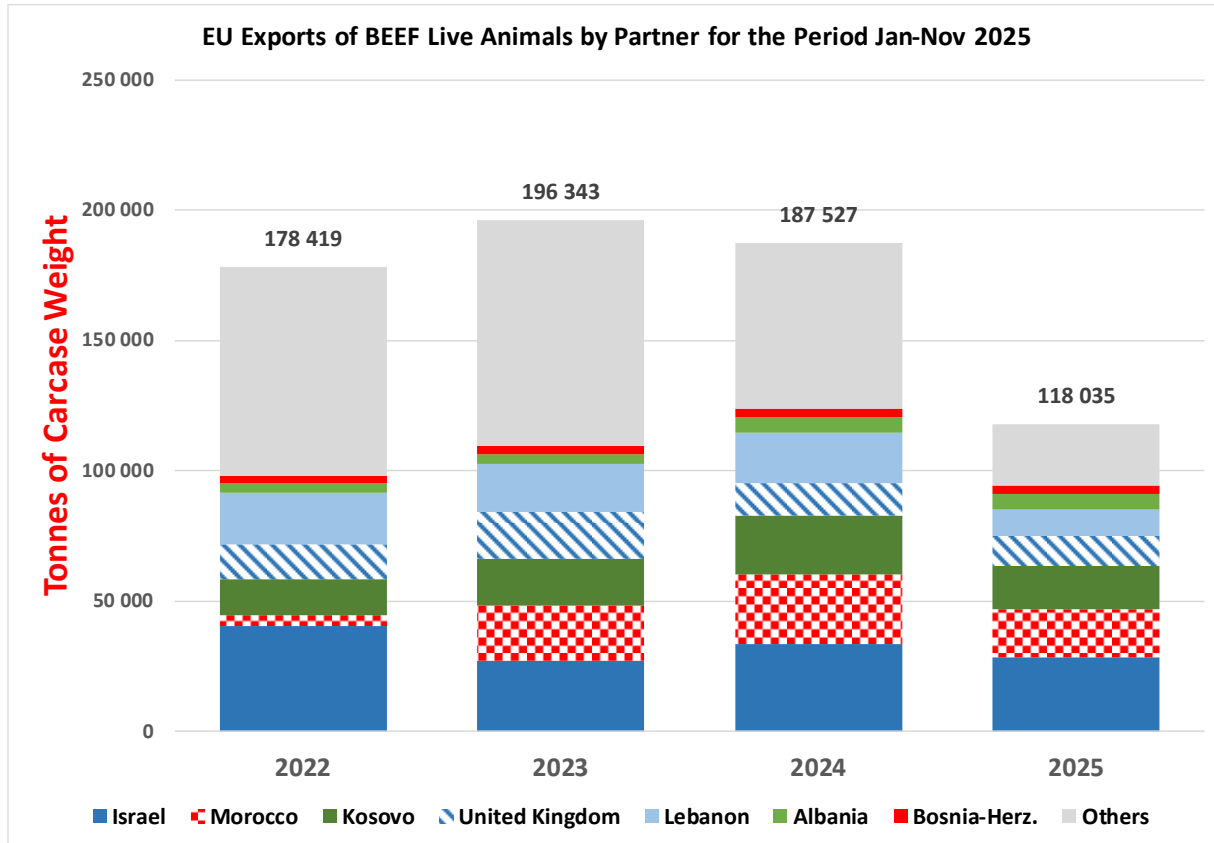


EU Exports of BEEF products (Comext)



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)

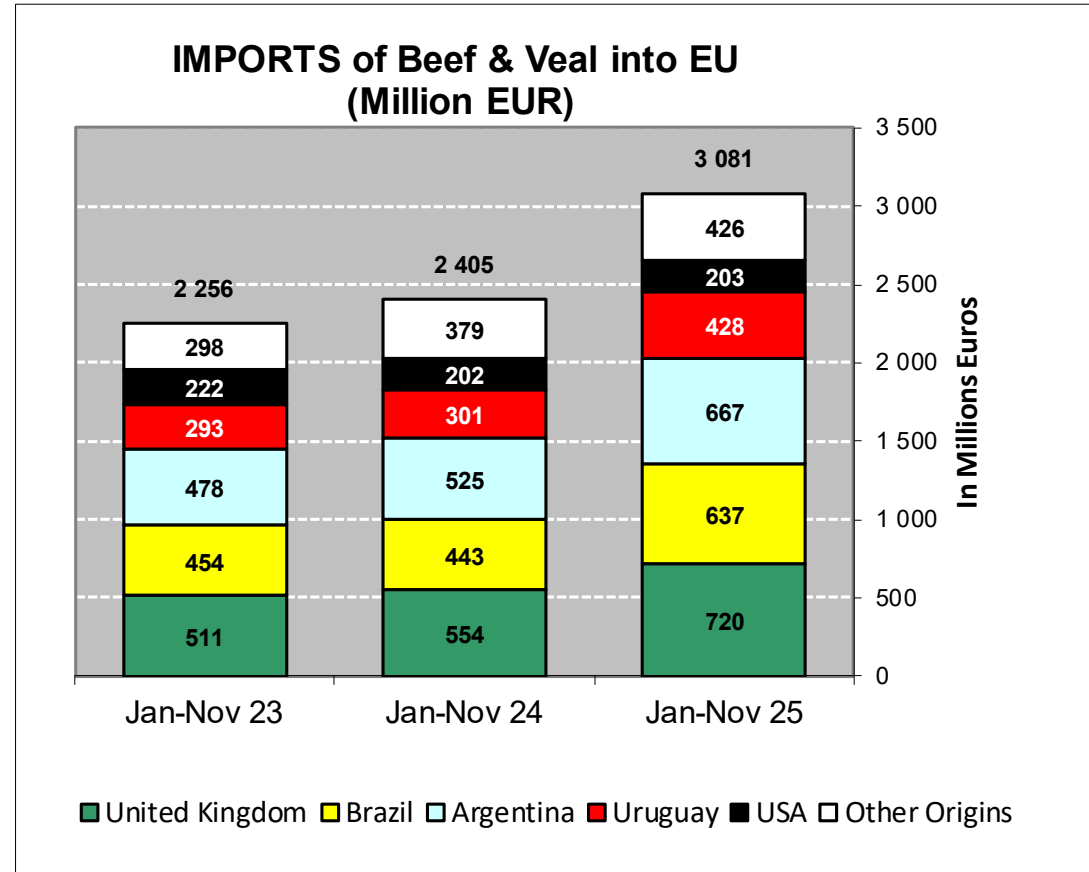
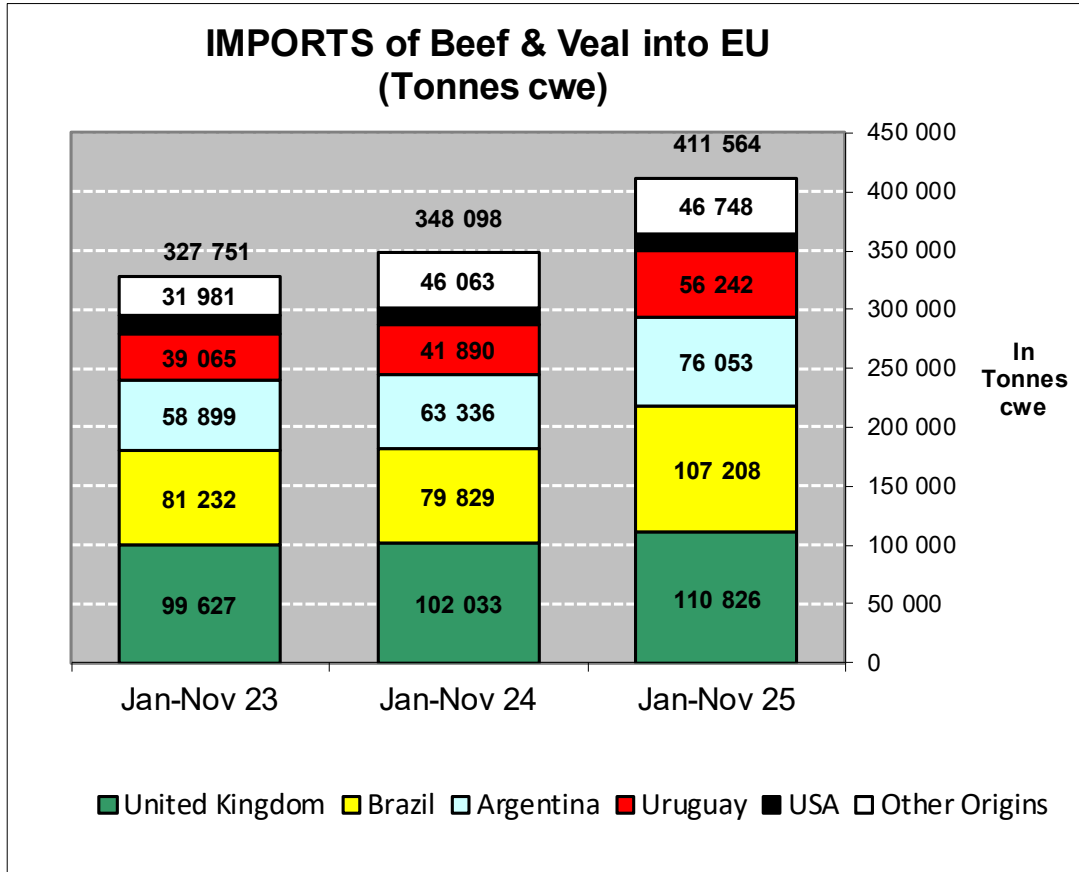
Origins	2021		2022		2023		2024		Jan-Nov 25		Compared to Jan-Nov 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	87 596	28.3%	118 759	33.0%	108 186	30.7%	111 326	29.4%	110 826	26.9%	+ 8.6%
Brazil	81 737	26.4%	86 512	24.0%	86 934	24.7%	87 603	23.1%	107 208	26.0%	+ 34.3%
Argentina	52 300	16.9%	62 584	17.4%	63 094	17.9%	68 730	18.1%	76 053	18.5%	+ 20.1%
Uruguay	42 669	13.8%	37 619	10.5%	41 544	11.8%	44 270	11.7%	56 242	13.7%	+ 34.3%
USA	14 910	4.8%	17 269	4.8%	18 345	5.2%	16 526	4.4%	14 488	3.5%	- 3.1%
Namibia	1 996	0.6%	5 168	1.4%	7 903	2.2%	15 547	4.1%	11 262	2.7%	- 16.7%
Australia	8 925	2.9%	8 385	2.3%	7 700	2.2%	8 352	2.2%	8 893	2.2%	+ 9.8%
New Zealand	4 380	1.4%	5 202	1.4%	4 531	1.3%	5 847	1.5%	7 096	1.7%	+ 29.8%
Paraguay	3 933	1.3%	5 404	1.5%	4 774	1.4%	5 303	1.4%	5 783	1.4%	+ 24.5%
Botswana	331	0.1%	928	0.3%	1 606	0.5%	7 718	2.0%	5 049	1.2%	- 27.3%
Switzerland	4 714	1.5%	4 730	1.3%	3 627	1.0%	3 793	1.0%	3 275	0.8%	- 5.0%
Canada	1 816	0.6%	2 172	0.6%	1 456	0.4%	1 102	0.3%	1 453	0.4%	+ 48.0%
Japan	1 478	0.5%	2 160	0.6%	836	0.2%	1 171	0.3%	1 284	0.3%	+ 18.9%
Serbia	963	0.3%	1 058	0.3%	812	0.2%	641	0.2%	690	0.2%	+ 17.1%
North Macedonia	61	0.0%	33	0.0%	29	0.0%	50	0.0%	642	0.2%	+++
Chile	238	0.1%	378	0.1%	365	0.1%	346	0.1%	509	0.1%	+ 54.4%
Other Destinations	1 220	0.4%	1 633	0.5%	928	0.3%	971	0.3%	812	0.2%	
Total	309 267		359 994		352 669		379 296		411 564		
% change			+ 16%		- 2%		+ 8%		+ 18.2%		

TRADE

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

EU IMPORTS

Beef & Live Animals (Excl Fats)

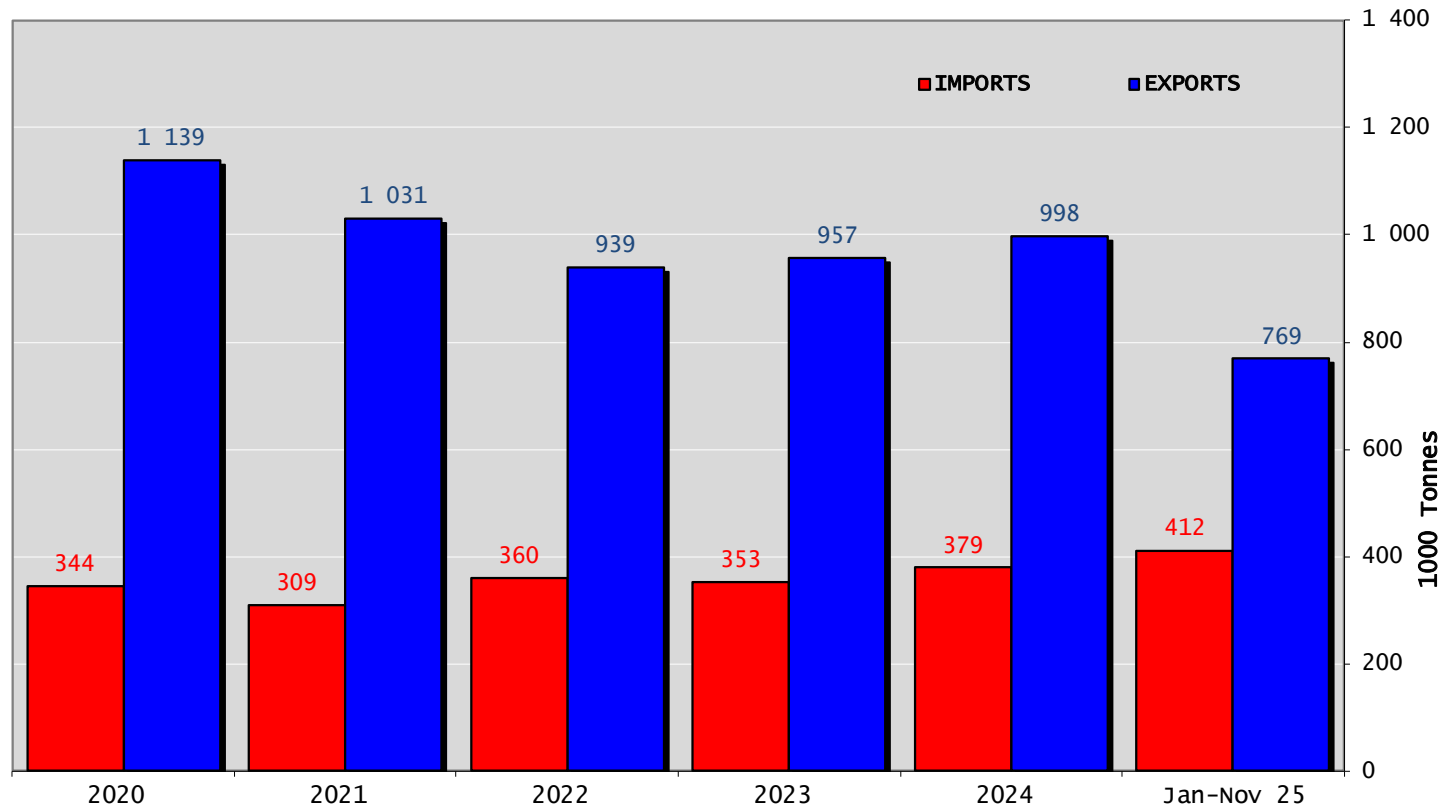


TRADE

EUTRADE BALANCE

Beef & Live Animals

Trade Balance of Beef Products and Live Animals

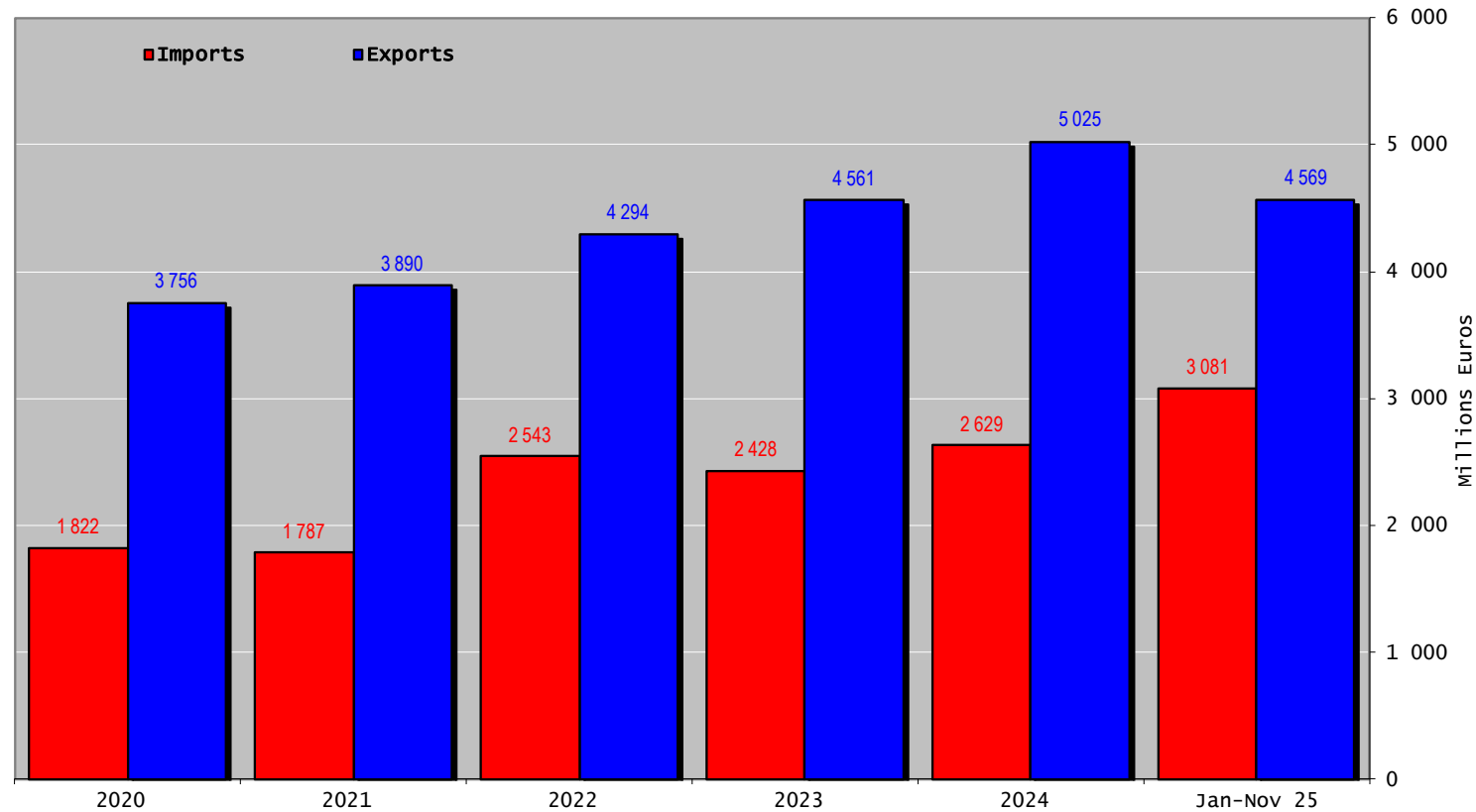


TRADE

EU TRADE BALANCE

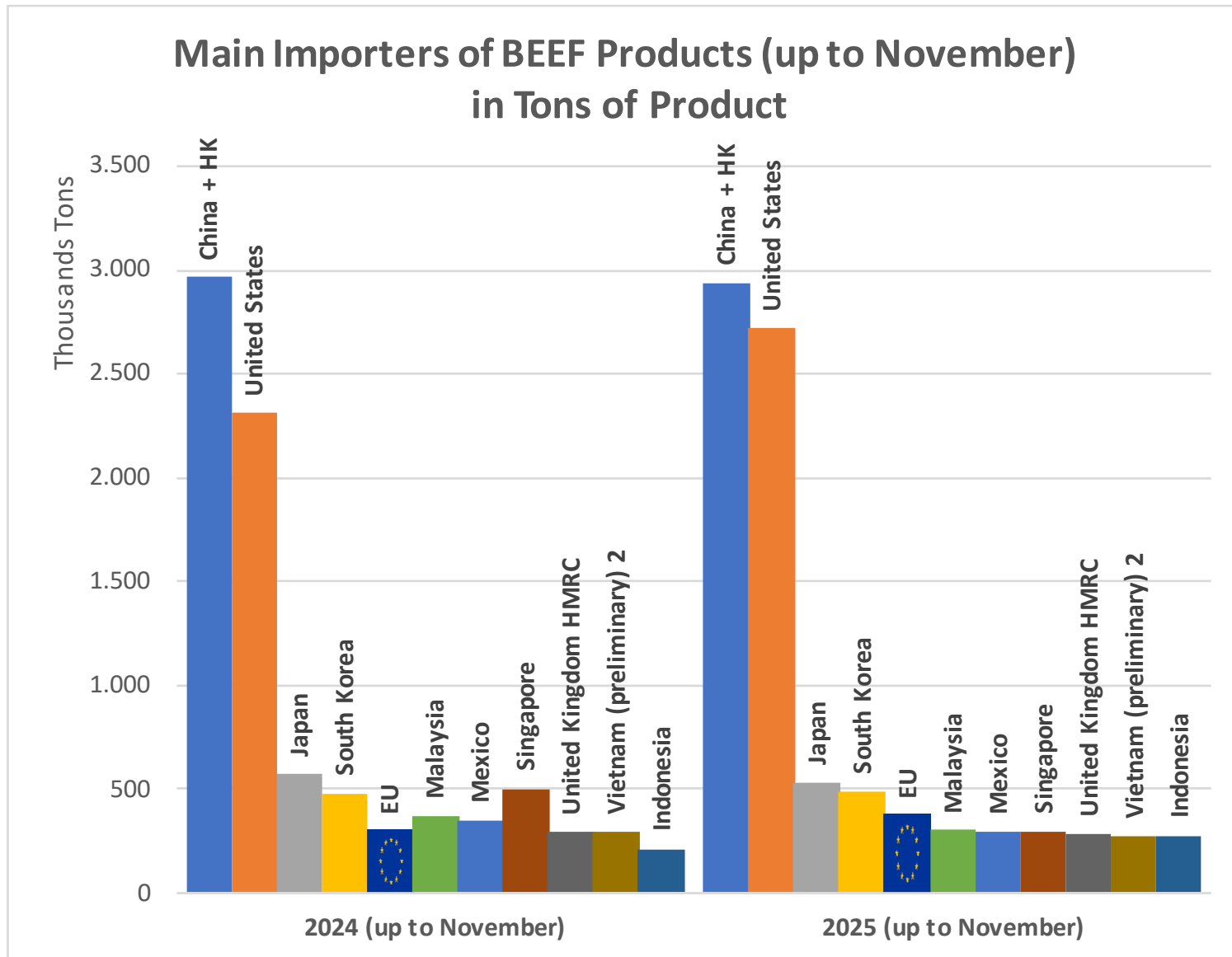
Beef & Live Animals

Trade Balance of Beef Products and Live Animals



WORLD BEEF MARKET

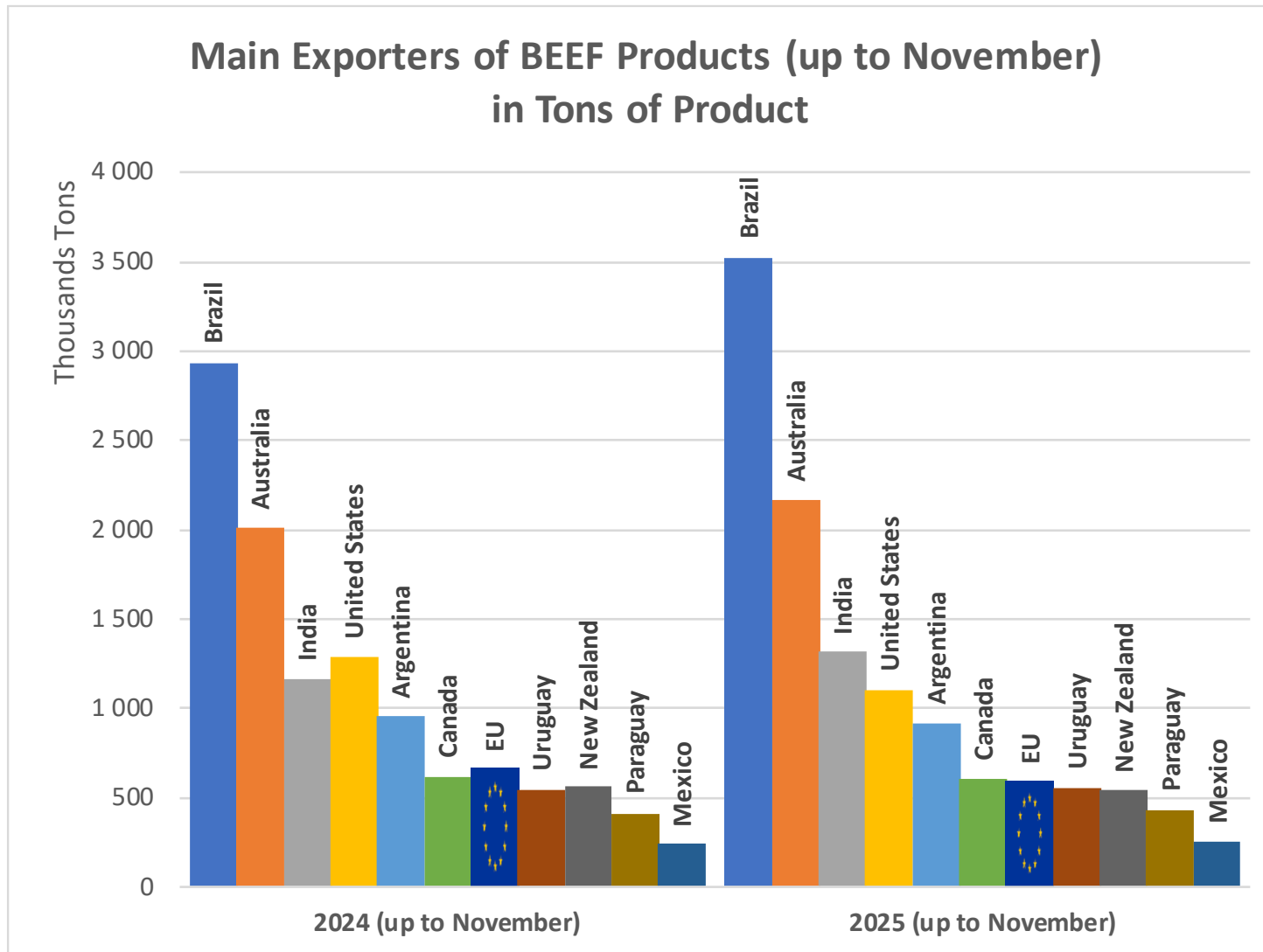
BEEF MAIN IMPORTERS



19 March 2026

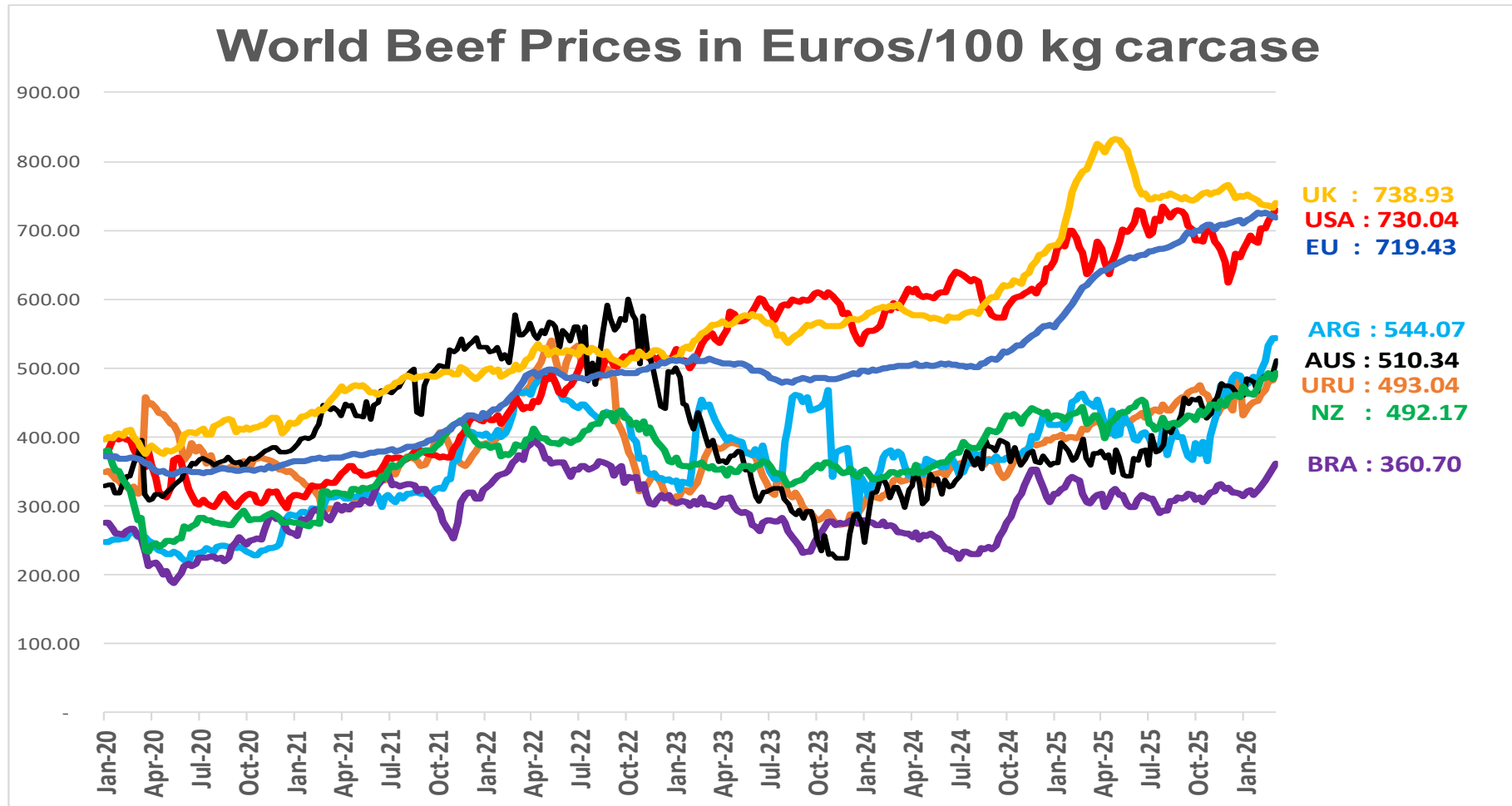
WORLD BEEF MARKET

BEEF MAIN EXPORTERS



WORLD BEEF MARKET

STEER PRICES EU, US, AUS, NZ



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

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/>