

# BEEF & VEAL MARKET SITUATION

## 23 April 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	13	-5.4%	4	4	4	4	+3.0%
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	412	-1.1%	124	119	111	112	+0.4%
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	71 535	-0.5%	22 872	22 320	21 963	21 934	-0.1%

Source : EStat Newcronos

# EU EVOLUTION TOTAL BOVINE

2022	2023	2024	2025	%Var 2025 2024	BOVINE 1-2 Year				%Var 2025 2024	BOVINE > 2 Year				%Var 2025 2024
				2022	2023	2024	2025		2022	2023	2024	2025		
454	441	427	407	-4.7%	1 138	1 120	1 085	1 080	-0.5%					
70	68	70	70	+0.5%	402	399	376	388	+3.2%					
314	304	309	307	-0.5%	669	658	668	660	-1.1%					
281	279	271	259	-4.6%	675	661	652	650	-0.3%					
2 600	2 572	2 449	2 395	-2.2%	5 089	5 039	4 904	4 902	-0.0%					
49	47	44	43	-3.7%	132	128	125	126	+0.6%					
1 810	1 805	1 701	1 684	-1.0%	2 746	2 748	2 684	2 695	+0.4%					
107	152	130	123	-4.9%	319	346	316	301	-4.7%					
785	834	782	836	+6.8%	3 181	3 124	3 067	3 037	-1.0%					
2 992	3 003	2 966	2 869	-3.3%	9 127	9 021	8 920	8 793	-1.4%					
112	115	114	114	idem	161	155	158	156	-1.3%					
1 520	1 517	1 175	1 294	+10.1%	2 966	2 904	2 791	2 804	+0.5%					
15	14	15	15	+0.9%	42	43	44	44	+1.9%					
66	60	56	55	-1.9%	219	208	200	198	-1.0%					
130	131	123	118	-4.1%	339	328	317	317	-0.2%					
41	40	38	38	+1.1%	98	98	98	101	+3.4%					
159	150	150	158	+5.1%	477	460	466	465	-0.3%					
3	3	3	3	-14.1%	7	7	7	6	-6.1%					
496	510	477	459	-3.7%	1 719	1 711	1 682	1 671	-0.6%					
430	427	415	422	+1.8%	834	832	826	821	-0.5%					
1 699	1 518	1 627	1 585	-2.5%	2 821	2 886	2 715	2 656	-2.2%					
201	208	200	215	+7.7%	862	828	797	784	-1.7%					
228	225	217	217	+0.1%	1 259	1 254	1 264	1 255	-0.7%					
130	126	125	129	+3.3%	186	186	186	183	-1.2%					
83	85	81	79	-2.1%	225	225	224	221	-1.5%					
203	198	186	183	-1.5%	336	327	315	307	-2.4%					
333	332	324	323	-0.4%	597	585	572	581	+1.5%					
15 308	15 162	14 475	14 401	-0.5%	36 627	36 279	35 458	35 200	-0.7%					

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

# 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	-5.8%	6	6	6	6	-5.3%	0	0	0	0	-16.0%
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	185	-1.3%	117	115	114	111	-3.1%	73	73	73	74	+1.5%
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	29 080	-0.8%	20 074	19 912	19 222	19 085	-0.7%	10 445	10 328	10 082	9 995	-0.9%

Source : EStat Newcronos

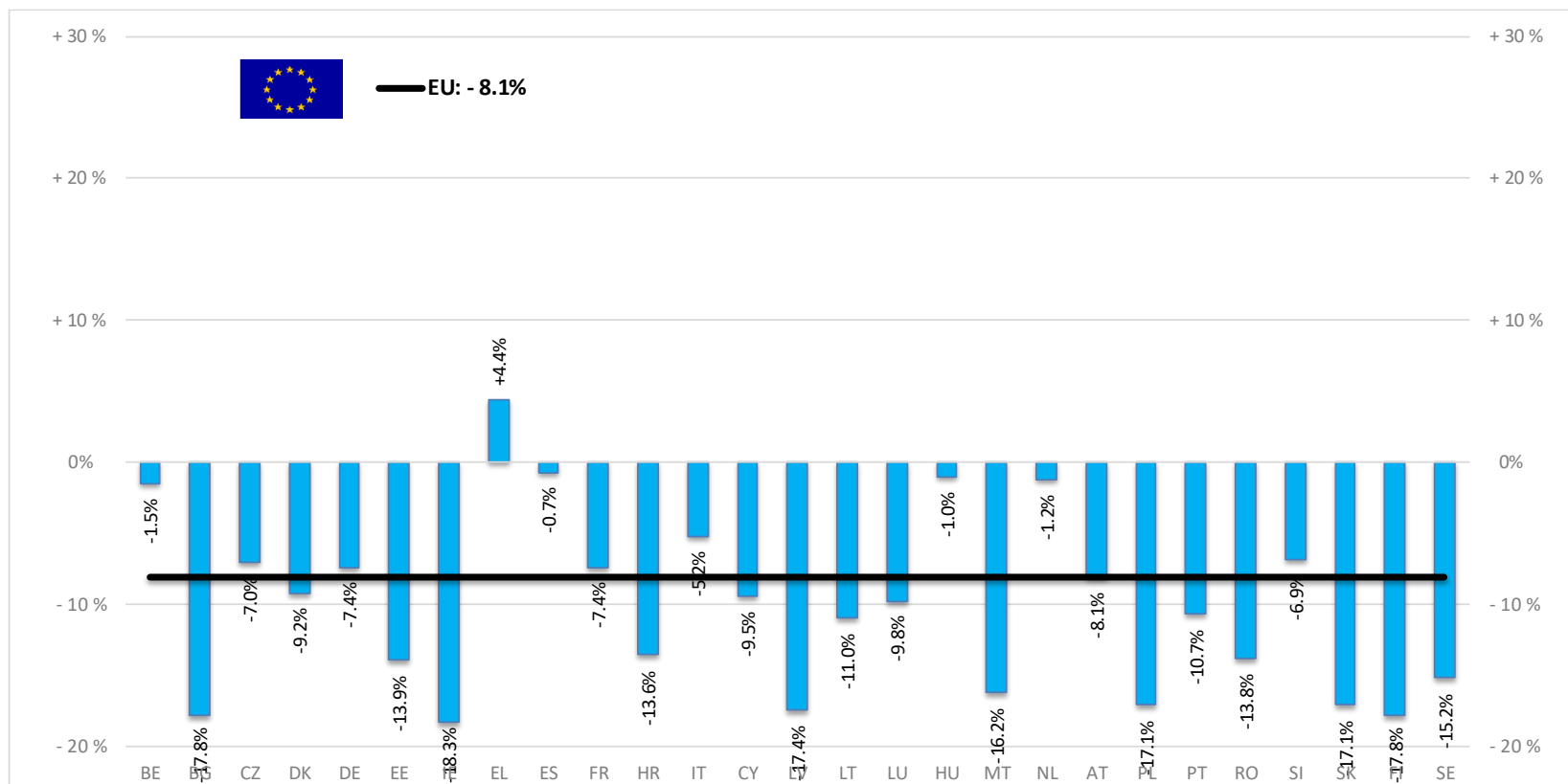
EU %Var is calculated considering only countries available in 2024 AND 2025

# PRODUCTION

# % EVOLUTION HEADS

HEADS	Jan-Jan 26/25
	<b>EU</b>
Bull	-7.1%
Bullock	-16.4%
Cow	-5.5%
Heifer	-9.8%
Calf	-9.7%
Young cattle	-10.6%
<b>Bovine meat</b>	<b>-8.1%</b>

Estimates for last month of period :



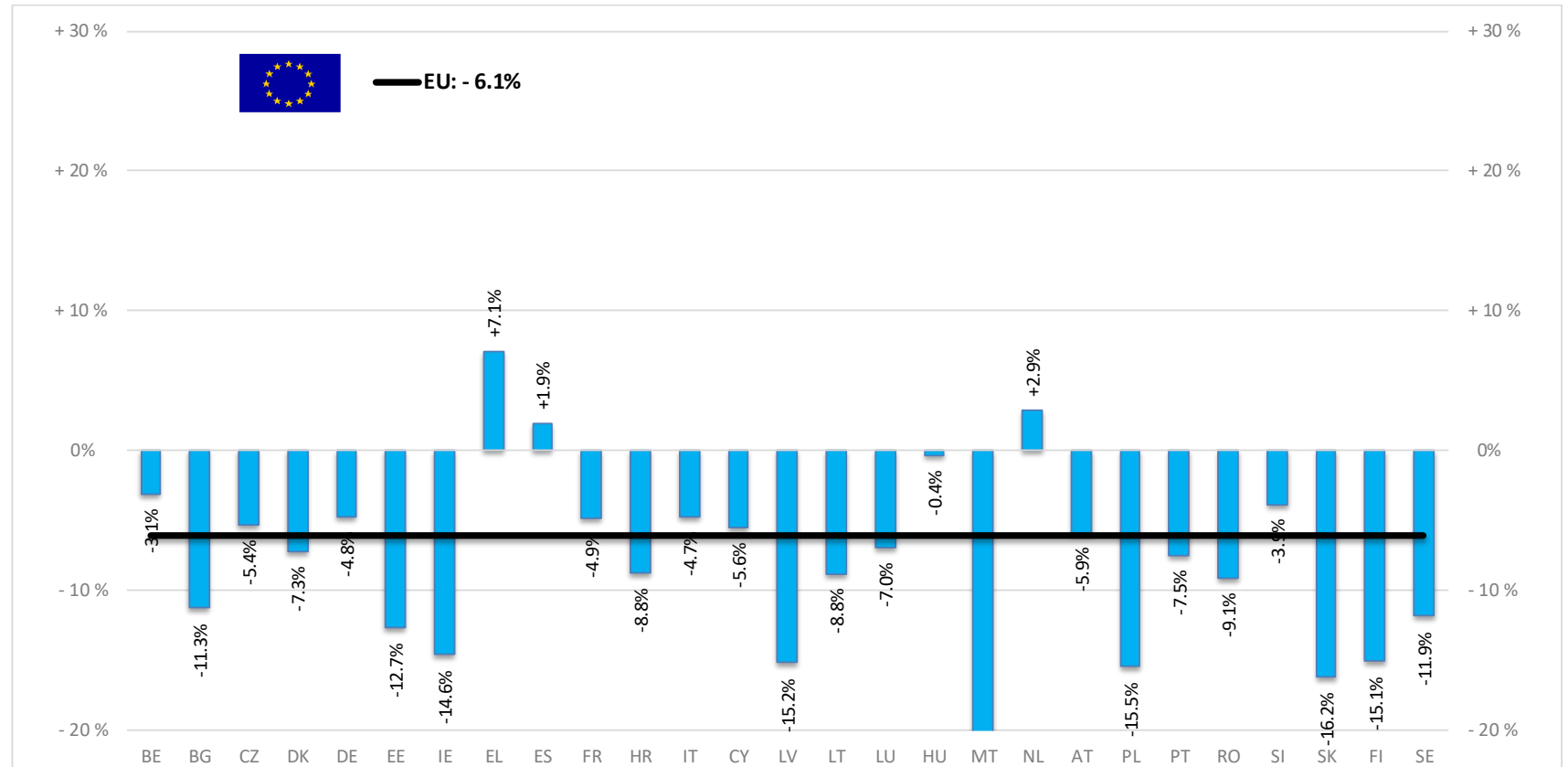
Source : Eurostat - Slaughtering in slaughterhouses - monthly data (apro\_mt\_pwgtm)

# PRODUCTION

# % EVOLUTION TONNES

TONS	Jan-Jan 26/25
	<b>EU</b>
Bull	-5.0%
Bullock	-12.2%
Cow	-4.5%
Heifer	-7.8%
Calf	-8.1%
Young cattle	-8.9%
<b>Bovine meat</b>	<b>-6.1%</b>

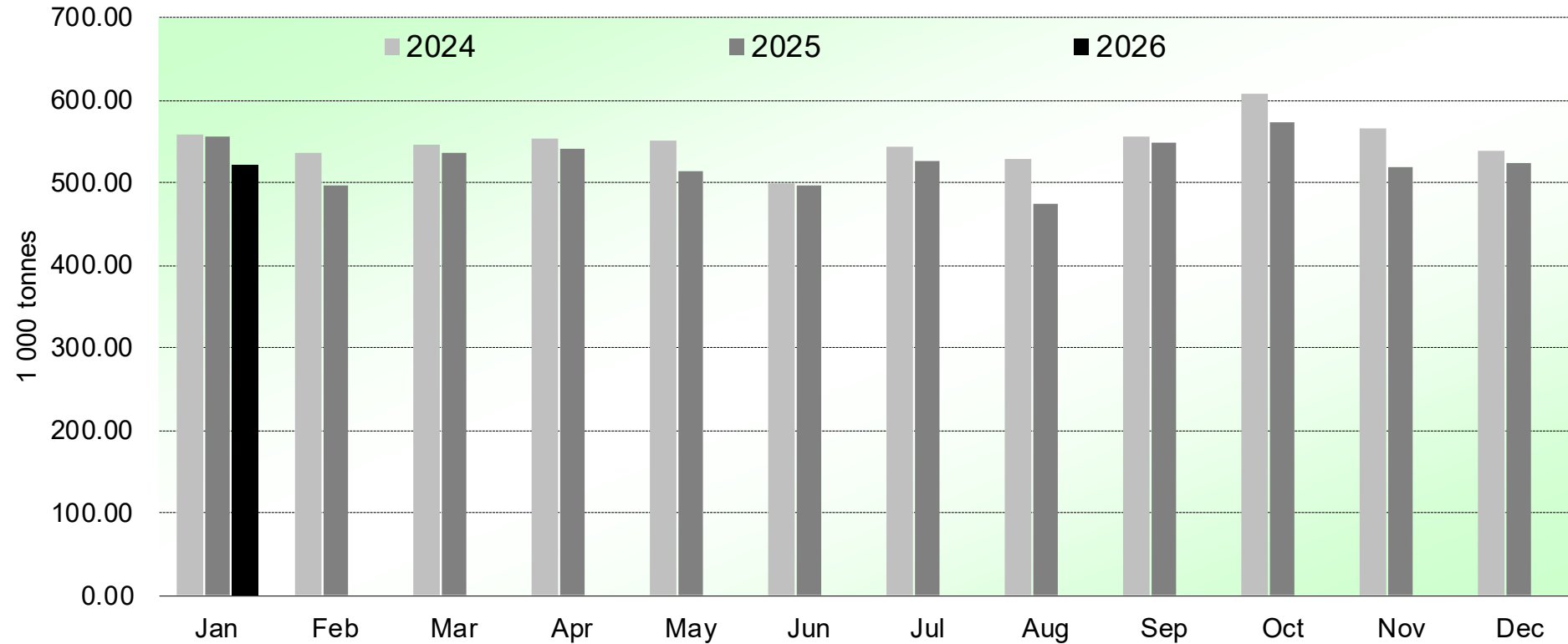
Estimates for last month of period :



# PRODUCTION

HISTORIC  
TONNES

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



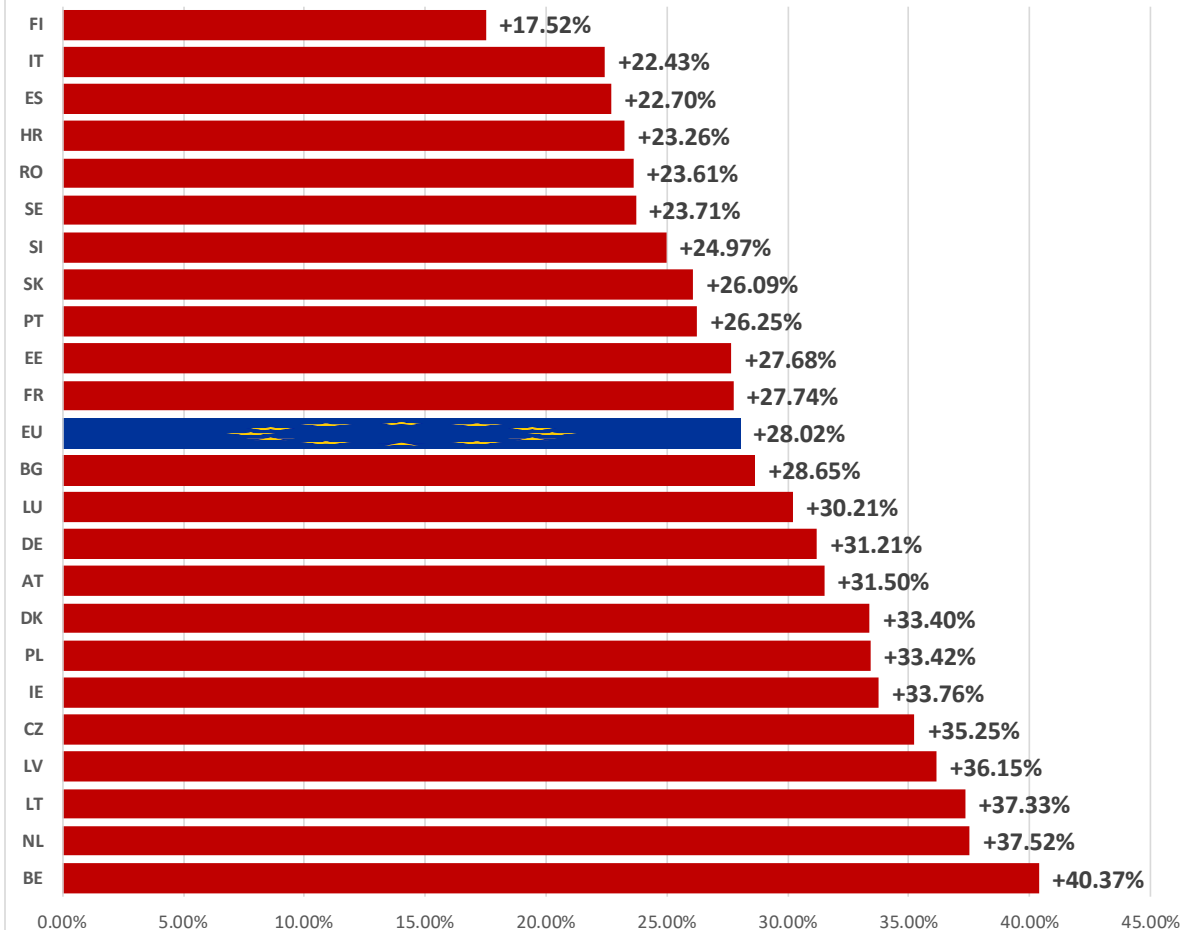
# PRICES CARCASSES

Dashboard

EU Prices week		15	Evolution since last week	Evolution since last month	Evolution since last year	
<b>Carcasse</b>	Average A/C/Z -R3	703.9	€ / 100 kg	- 0.4%	- 2.7%	+ 9.7%
	Young Bovines (Z)	712.3		+ 0.2%	- 1.6%	+ 11.8%
	Young Bulls (A)	703.5		- 0.7%	- 2.8%	+ 13.5%
	Steers (C)	703.5		+ 1.4%	- 1.9%	- 8.3%
	Cows (D)	615.6		+ 0.2%	- 0.7%	+ 11.5%
	Heifers (E)	725.6		+ 0.2%	- 1.3%	+ 13.7%
	Calves slaughtered <8M	837.4		- 1.2%	- 3.2%	+ 8.1%
<b>Live Animals</b>	Male Calves Dairy Type	301.5	€/head	+ 0.0%	+ 4.1%	+ 30.5%
	Male Calves Beef Type	481.2		- 0.1%	- 0.9%	+ 27.2%
	Young Store Cattle	5.50		- 1.2%	- 1.6%	+ 19.8%
	Yearling Male Store Cattle	6.64	€/kg	- 1.5%	- 0.4%	+ 14.7%
	Yearling Female Store Cattle	5.36		- 24.8%	- 0.4%	+ 25.7%

# PRICES CARCASSES

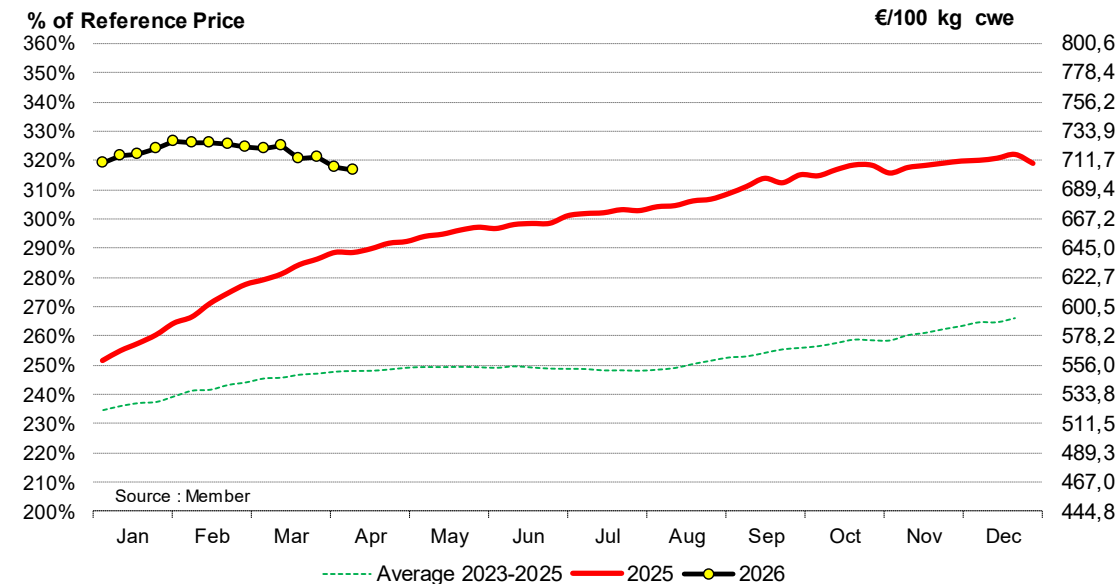
EU ACZ R3 Price Comparison between average monthly price  
April 2025 - March 2026 compared to April 2024 - March 2025



# EU EVOLUTION A/C/Z.R3

ACZ - R 3 > Week 15 2026

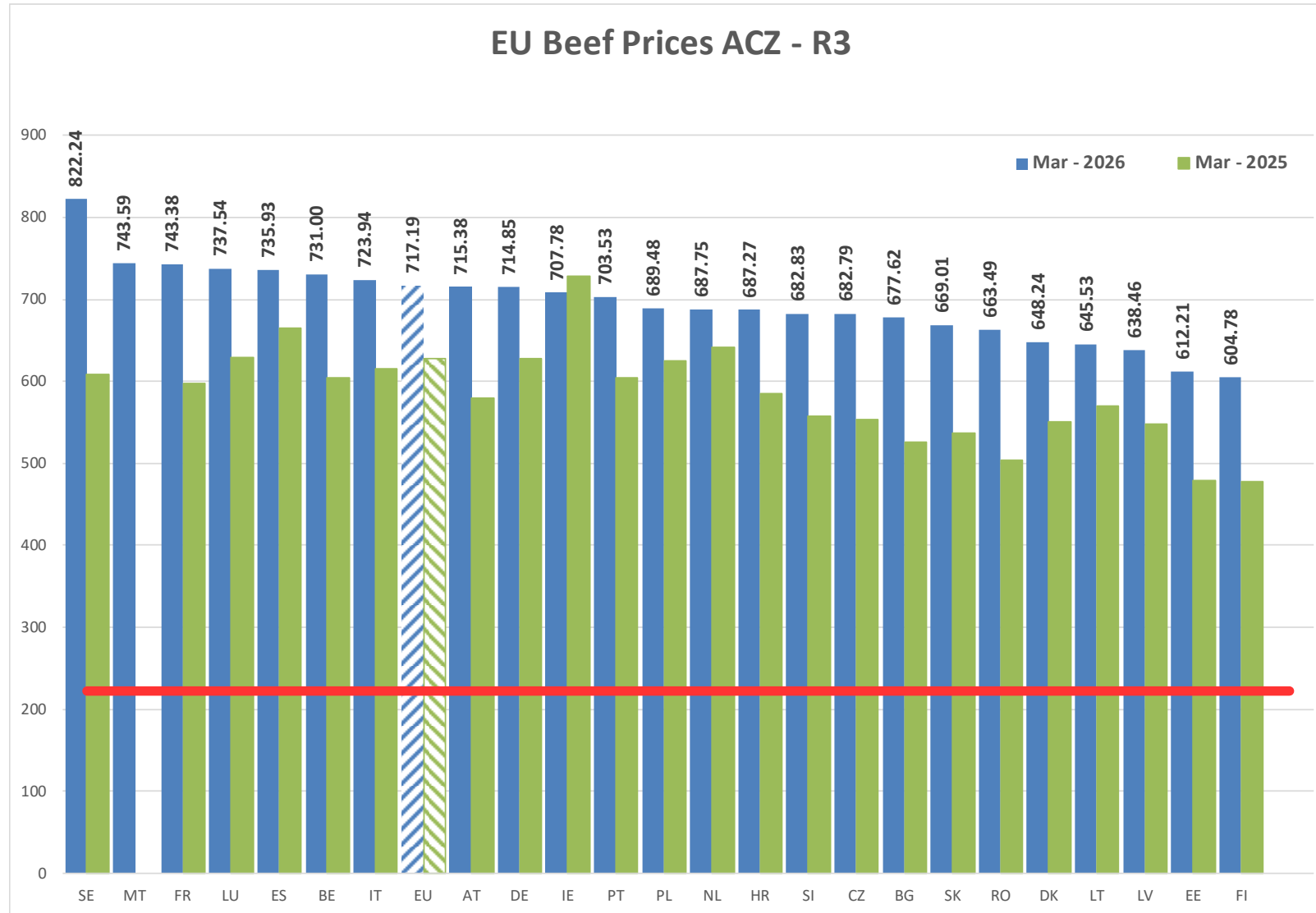
Male bovines carcasses ACZ - R 3 > Week 15 2026



Price in week 15	<b>703,90</b>	Average price in March 2026	<b>717,19</b>
% change y/y :	<b>+ 8,8%</b>	% change y/y :	<b>+14,1%</b>
% of ref. price in week 15	<b>316,5%</b>		

# PRICES CARCASSES

# EU EVOLUTION A/C/Z.R3



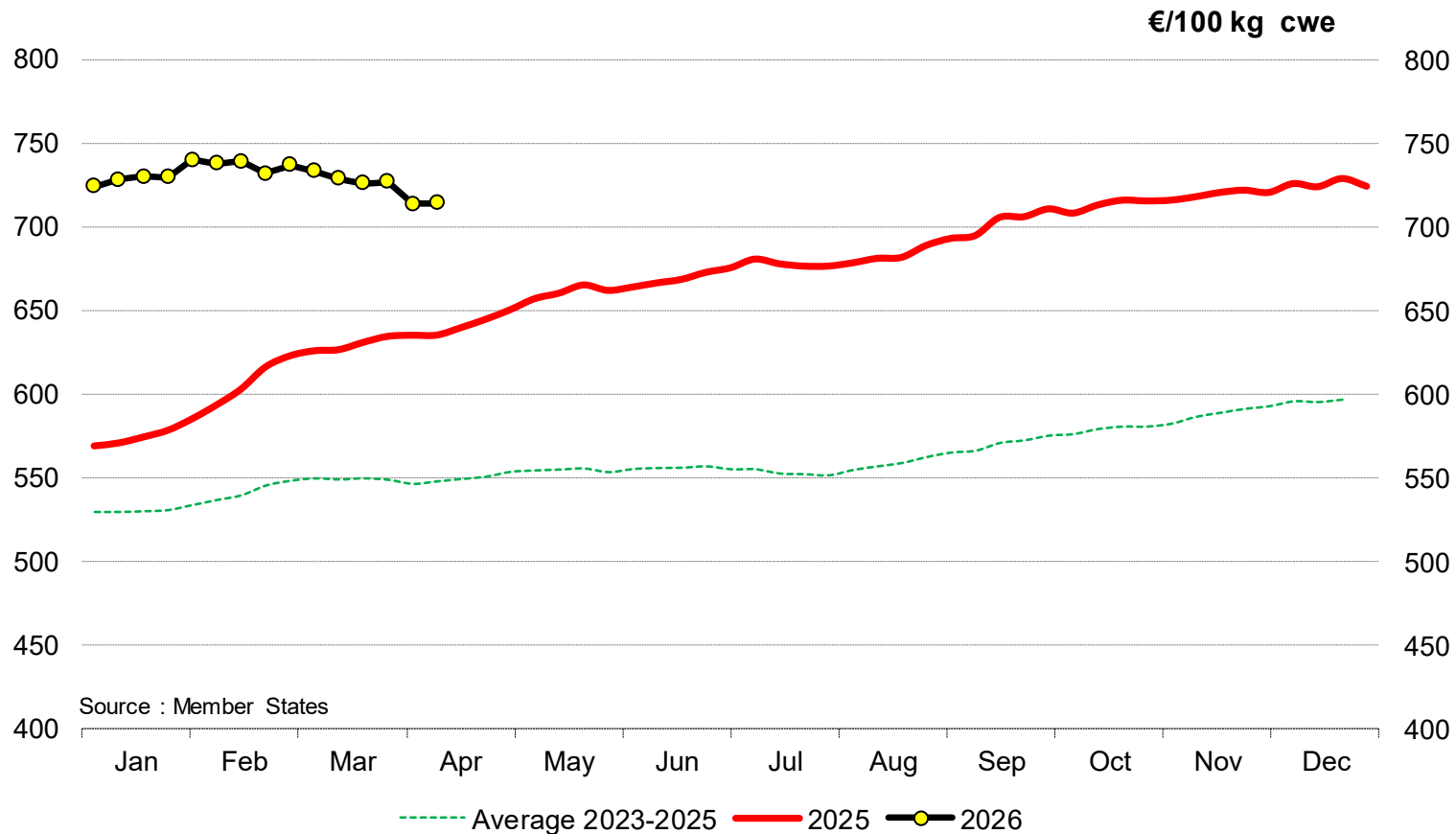
23 April 2026

# PRICES CARCASSES

# EU EVOLUTION YOUNG BULL – A.R3

A - R 3 > Week 15 2026

Young bovines A - R 3 > Week 15 2026



Price in week 15 **714.28**  
% change y/y : **+ 11.0%**

Average price in March 2026 **728.18**  
% change y/y : **+15.7%**

23 April 2026

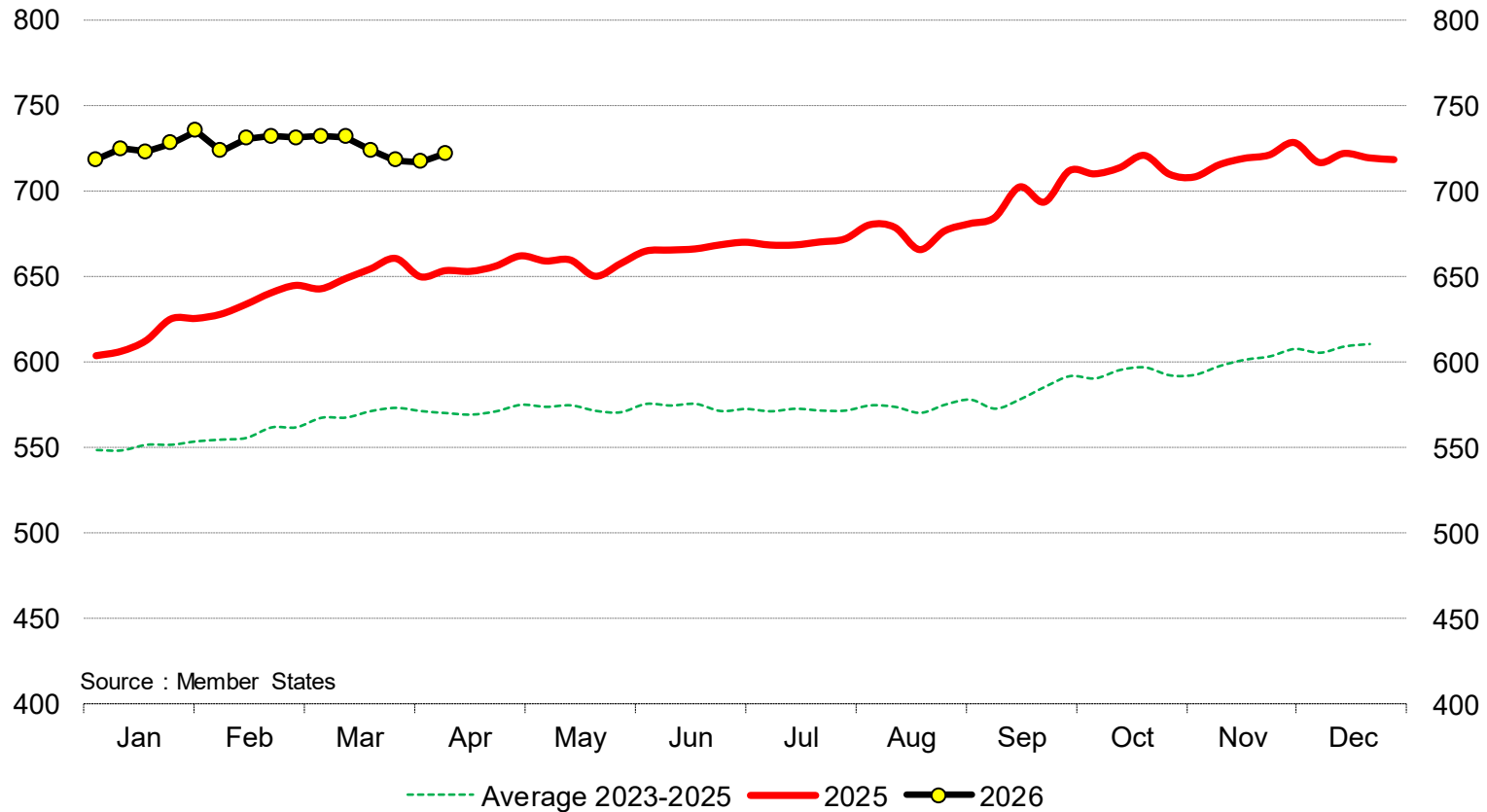
# PRICES CARCASSES

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

Z - R 3 > Week 15 2026

Young bovines 8-12 months Z - R 3 > Week 15 2026

€/100 kg cwe



Price in week 15    **722.23**  
% change y/y :    **+ 9.5%**

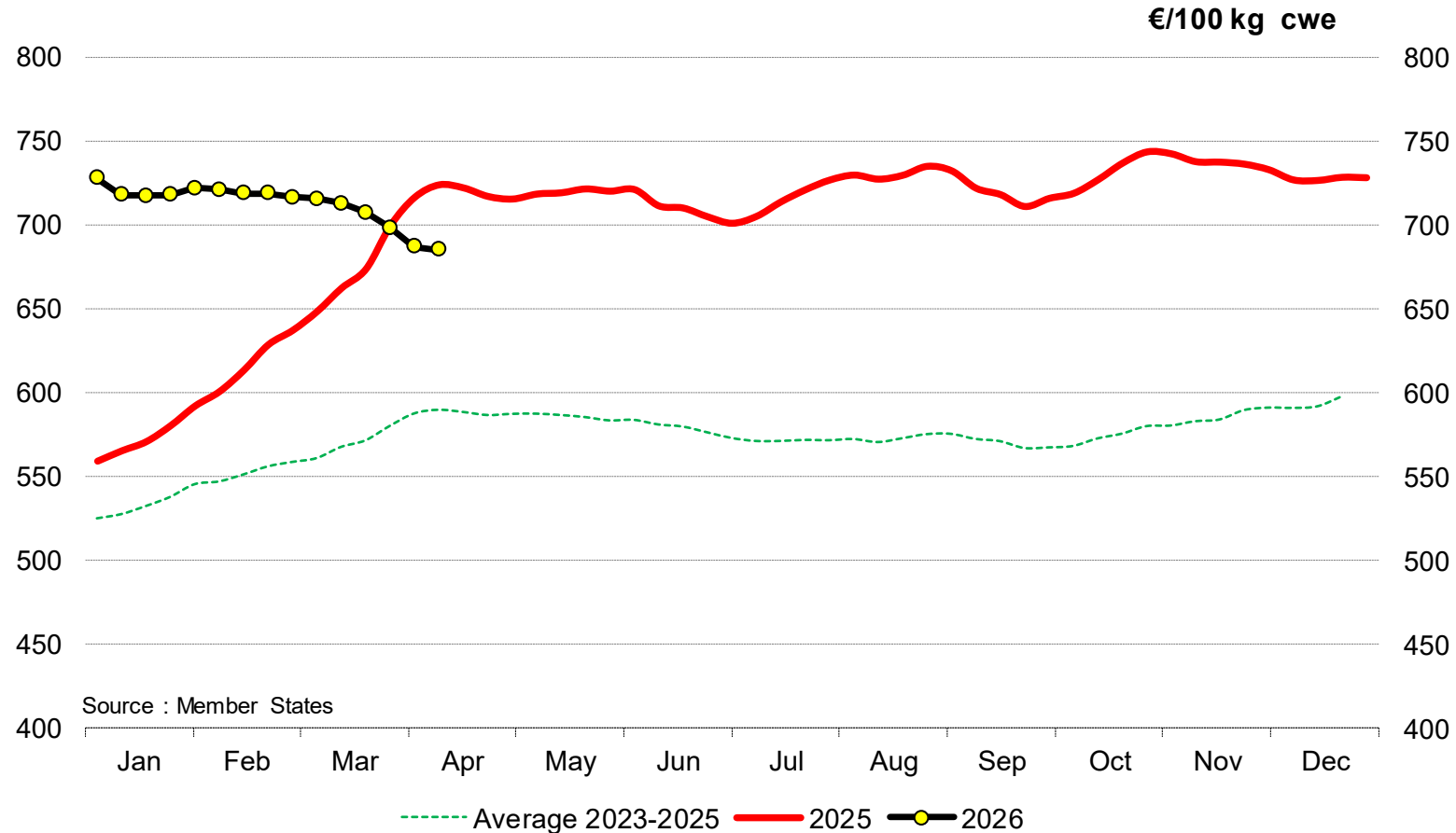
Average price in March 2026    **725.85**  
% change y/y :    **+11.4%**

# PRICES CARCASSES

# E.U. EVOLUTION STEER – C.R3

C - R 3 > Week 15 2026

Bullocks C - R 3 > Week 15 2026



Price in week 15 **685.20**  
% change y/y : **- 5.6%**

Average price in March 2026 **707.45**  
% change y/y : **+5.6%**

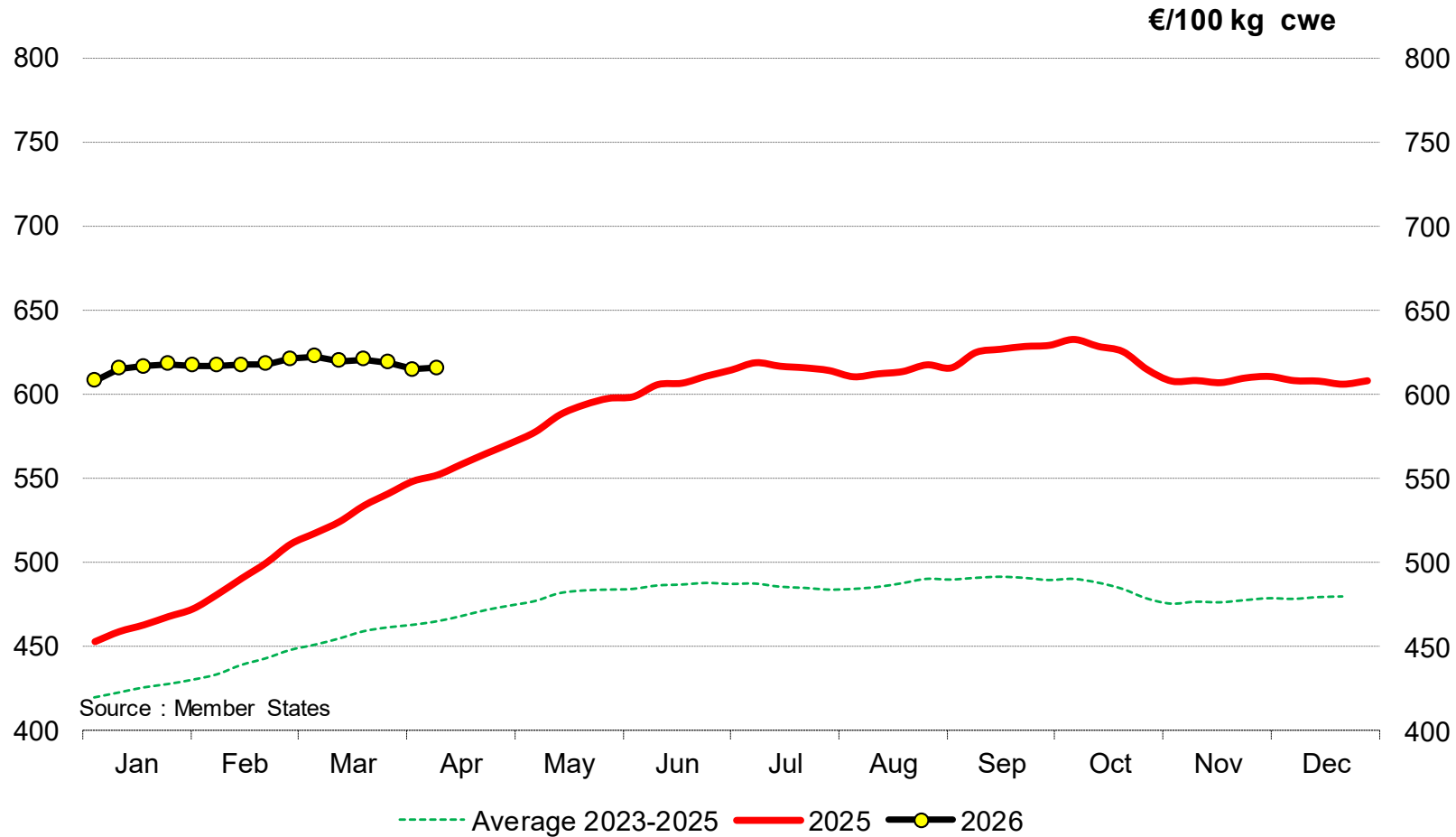
23 April 2026

# PRICES CARCASSES

## E.U. EVOLUTION COW – D.03

D - O 3 > Week 15 2026

Cows D - O 3 > Week 15 2026



Price in week 15 **615.62**

% change y/y : **+ 10.4%**

Average price in March 2026 **620.29**

% change y/y : **+17.4%**

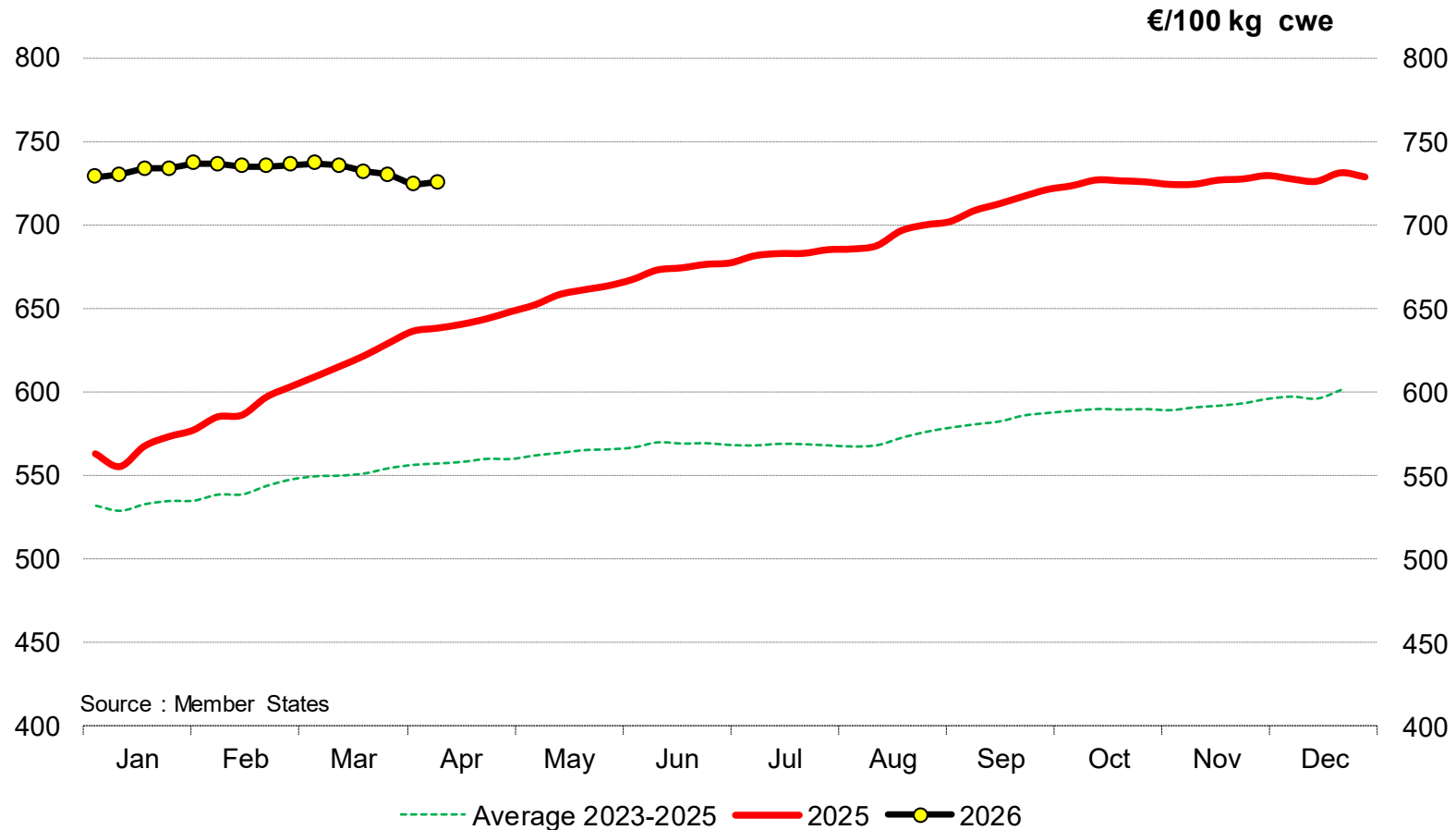
23 April 2026

# PRICES CARCASSES

# EU EVOLUTION HEIFER – E.R3

E - R 3 > Week 15 2026

Cows E - R 3 > Week 15 2026



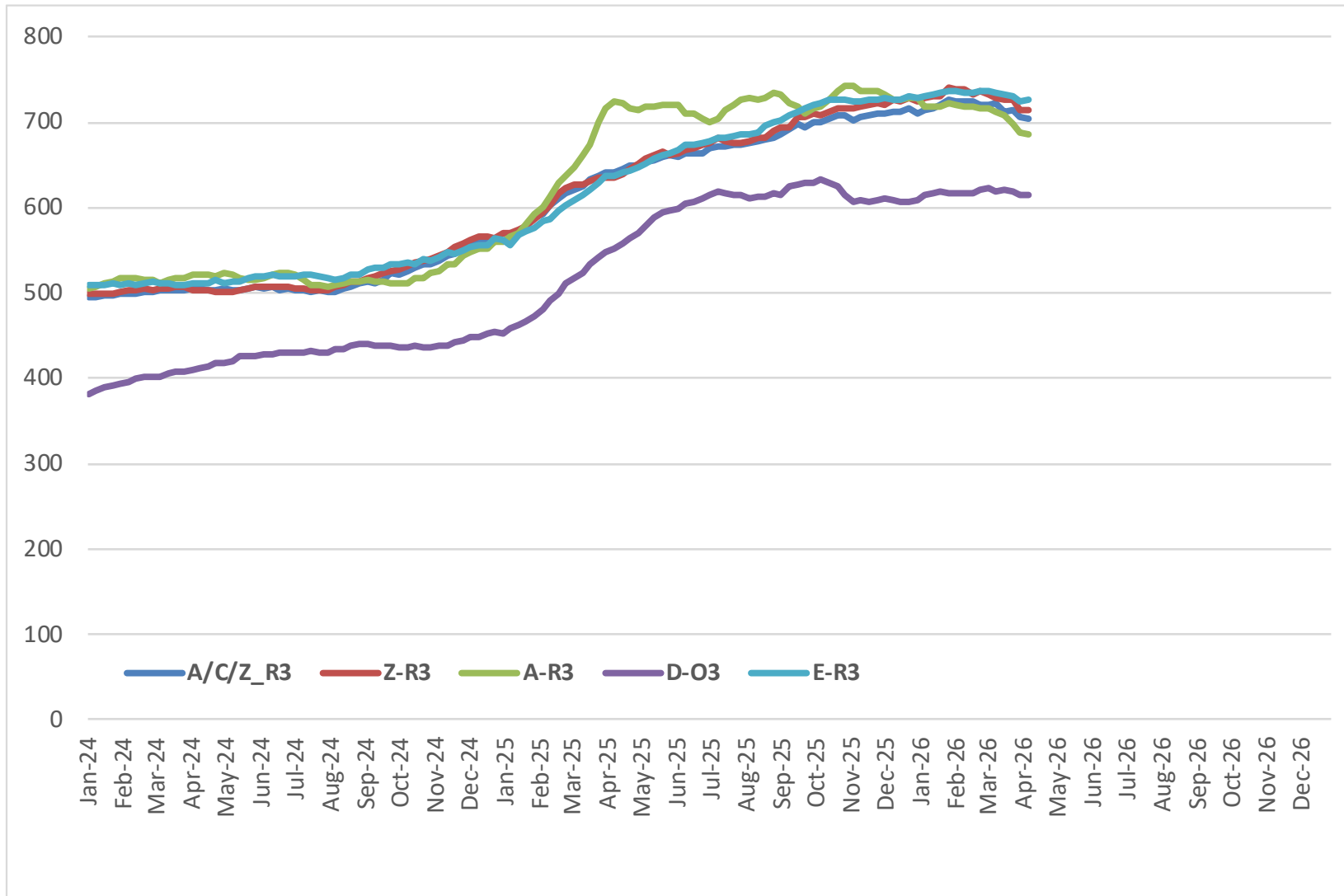
Price in week 15    **725.69**  
% change y/y : **+ 12.1%**

Average price in March 2026    **733.17**  
% change y/y : **+18.6%**

23 April 2026

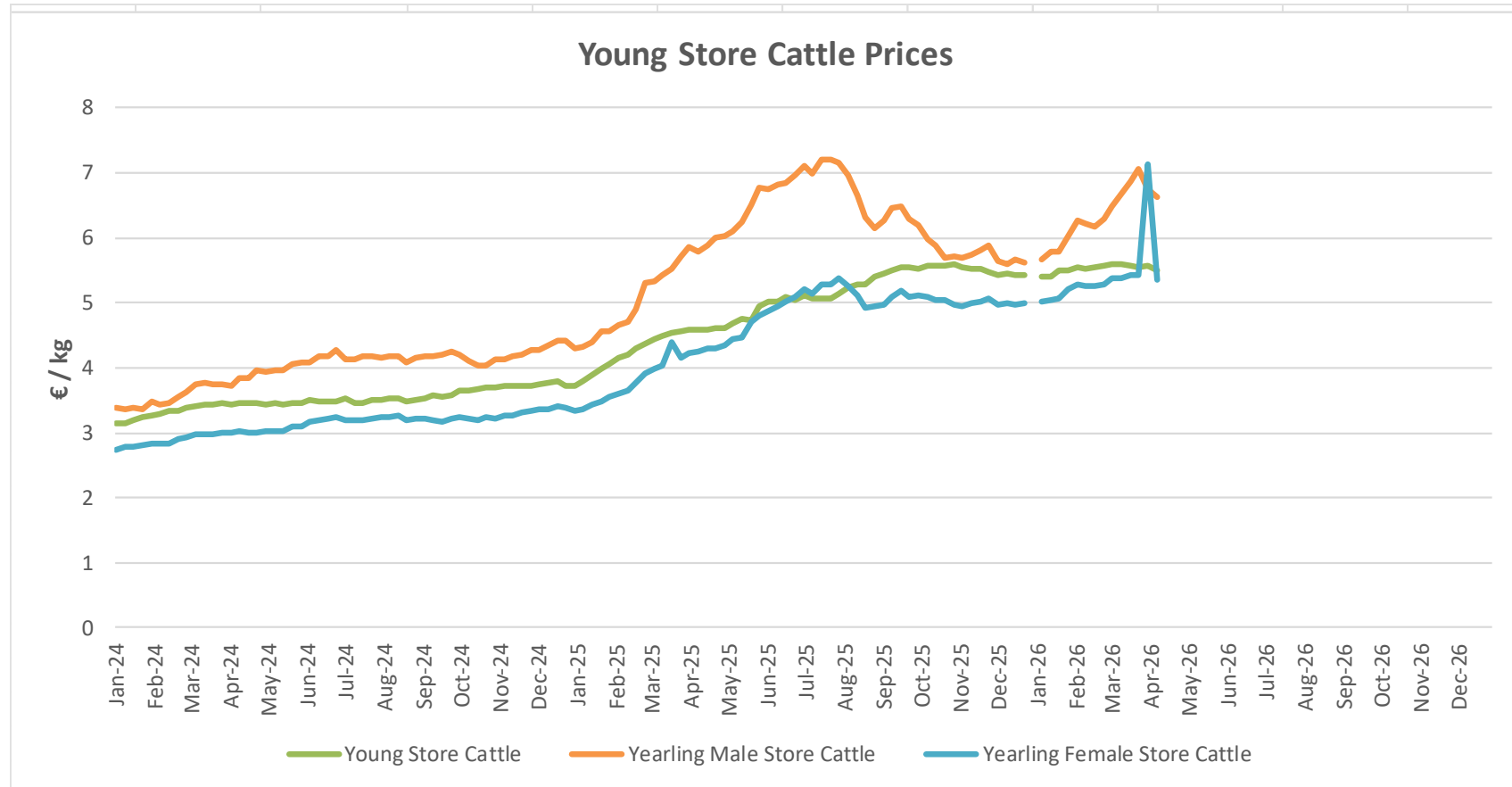
# PRICES CARCASSES

## EU EVOLUTION All CAT GLOBAL VIEW



# PRICES LIVE BOVINES

## EU EVOLUTION STORE CATTLE



### Young Store Cattle

Price in week 15 **5.50**

% change y/y : +19.8%

### Yearling Female Store Cattle

Price in week 15 **5.36**

% change y/y : +25.7%

### Yearling Male Store Cattle

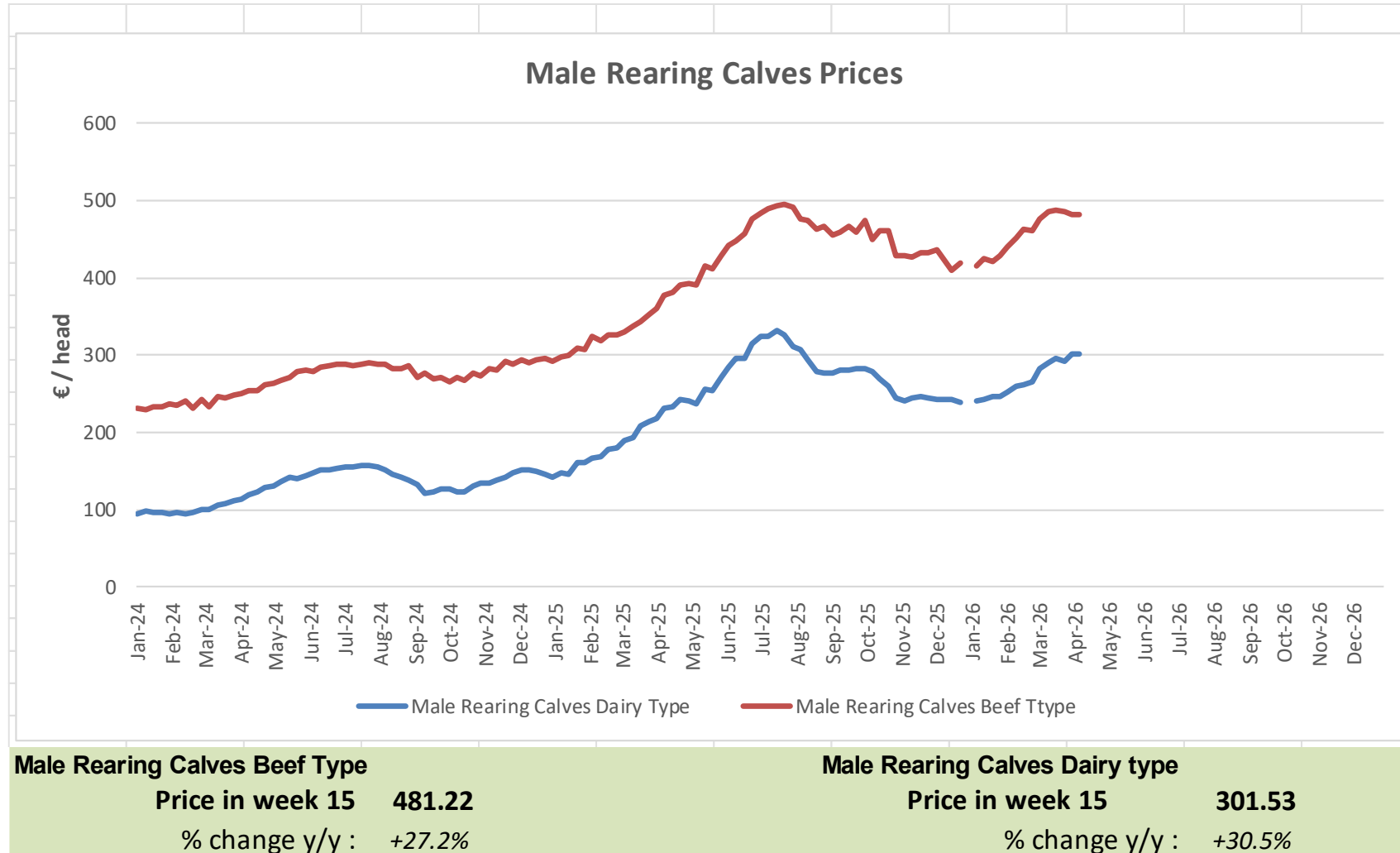
Price in week 15 **6.64**

% change y/y : +14.7%

23 April 2026

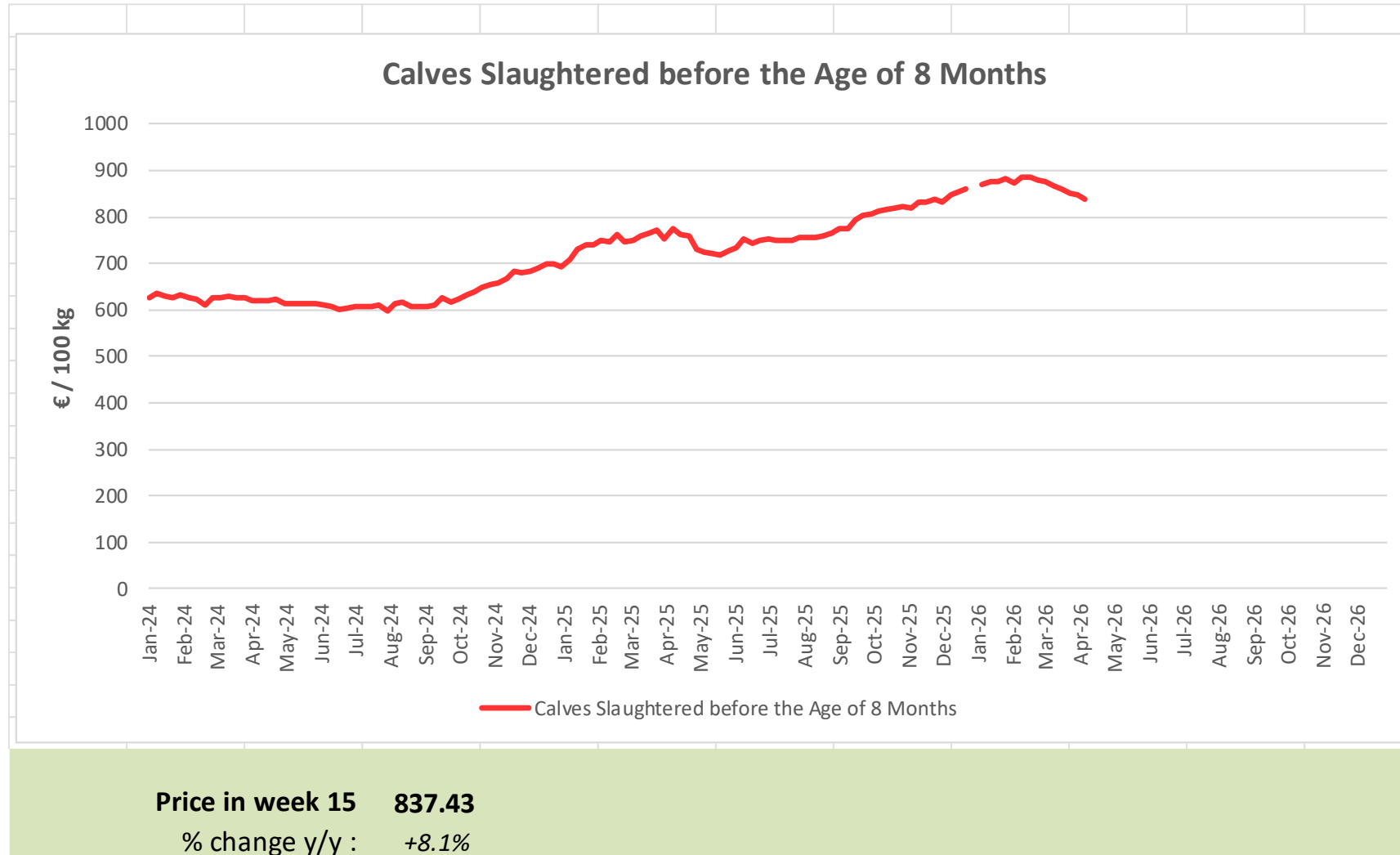
# PRICES LIVE BOVINES

## EU EVOLUTION Male Calves – 8D4W

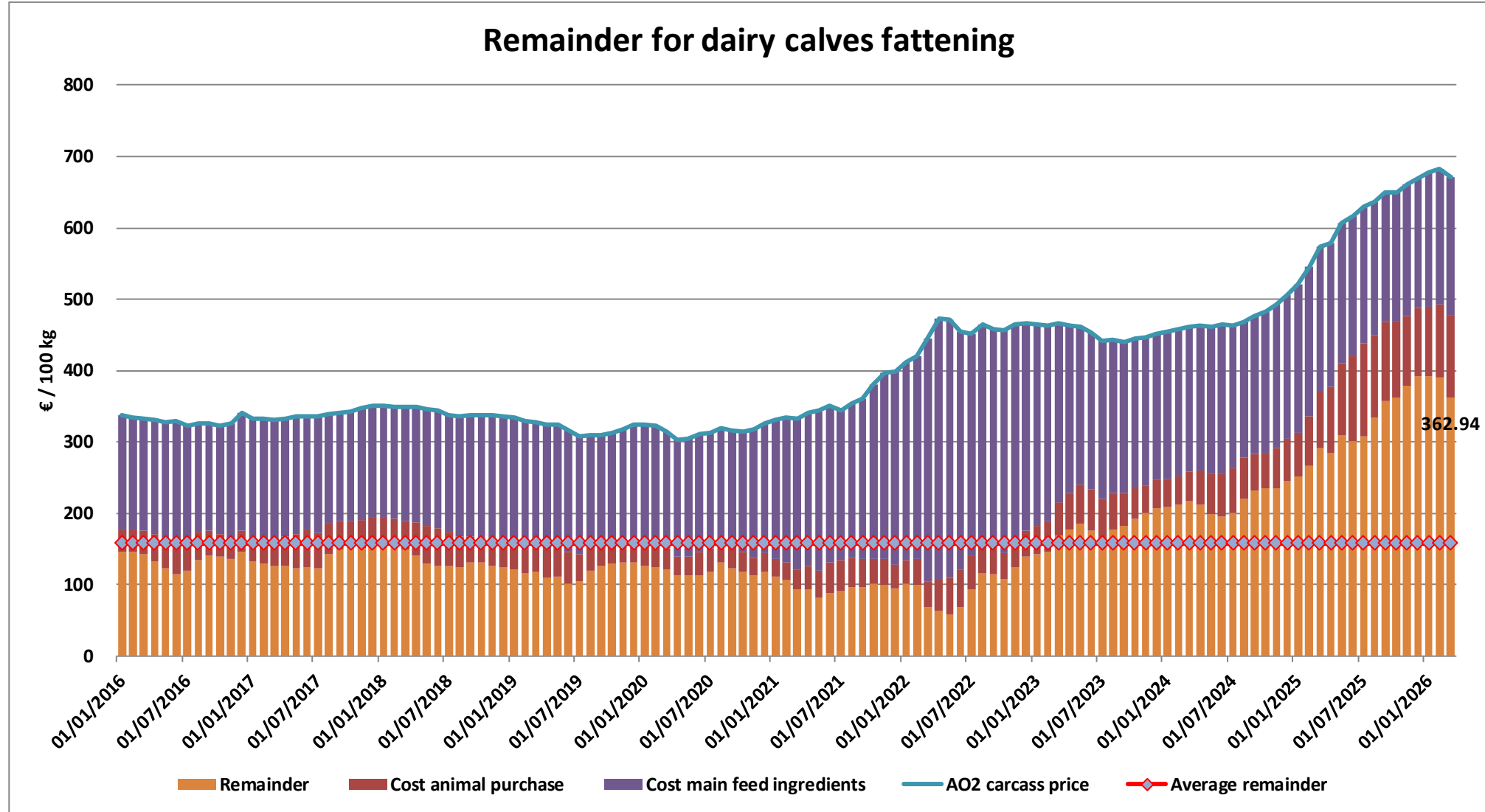


# PRICES LIVE BOVINES

## EU EVOLUTION Butcher Calves

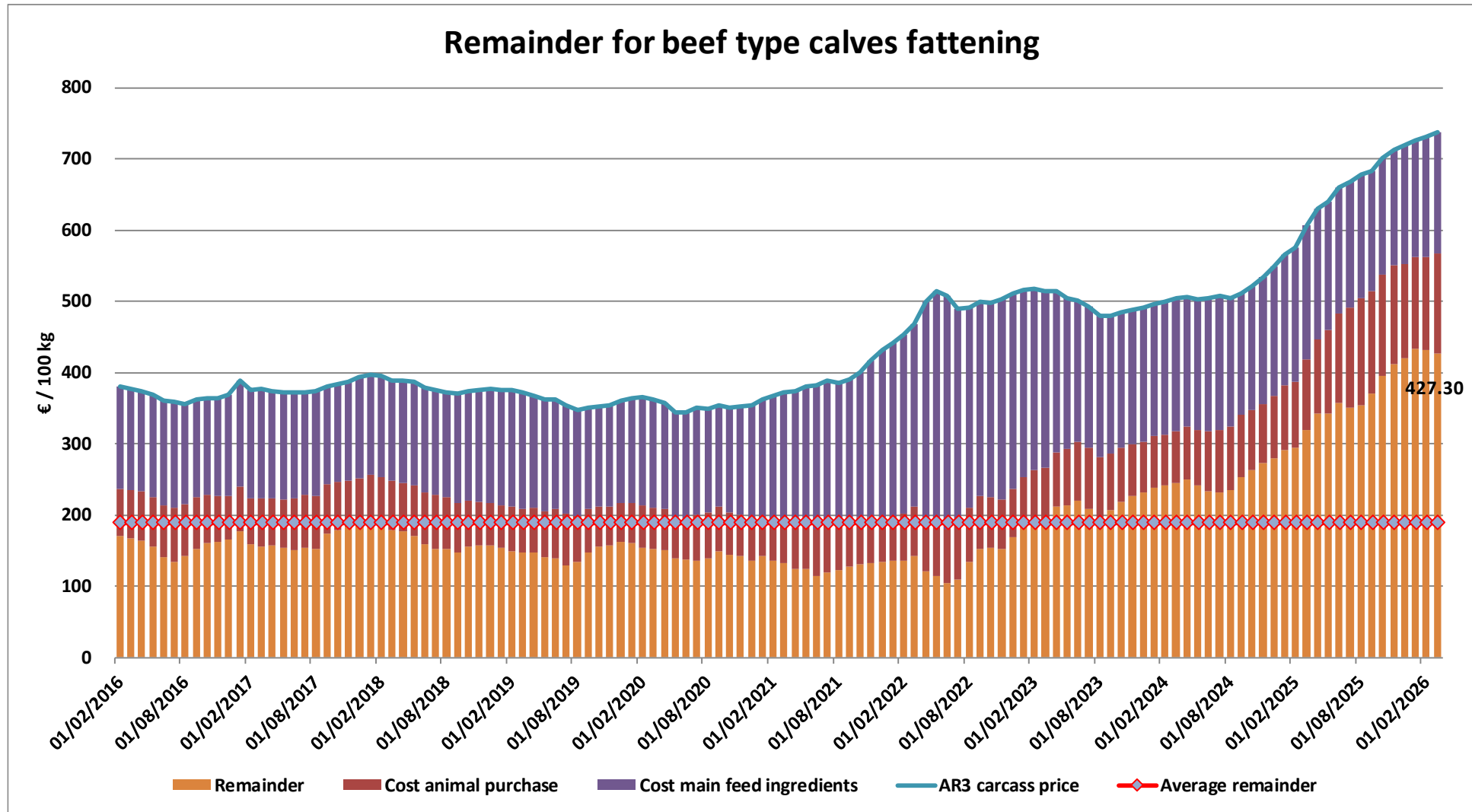


# REMAINDERS

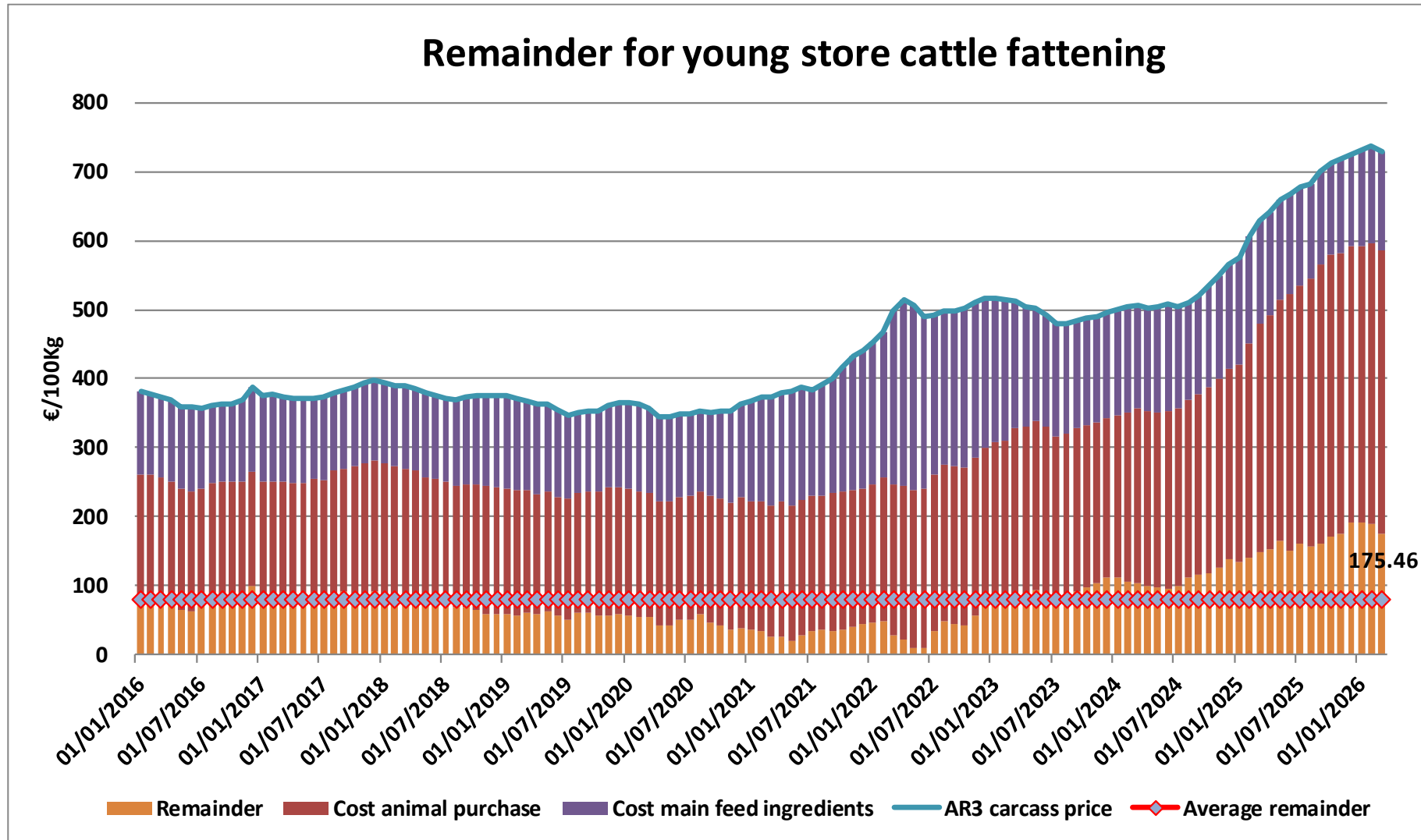


362.94

# REMAINDERS



# REMAINDERS



# TRADE

# EU EXPORTS

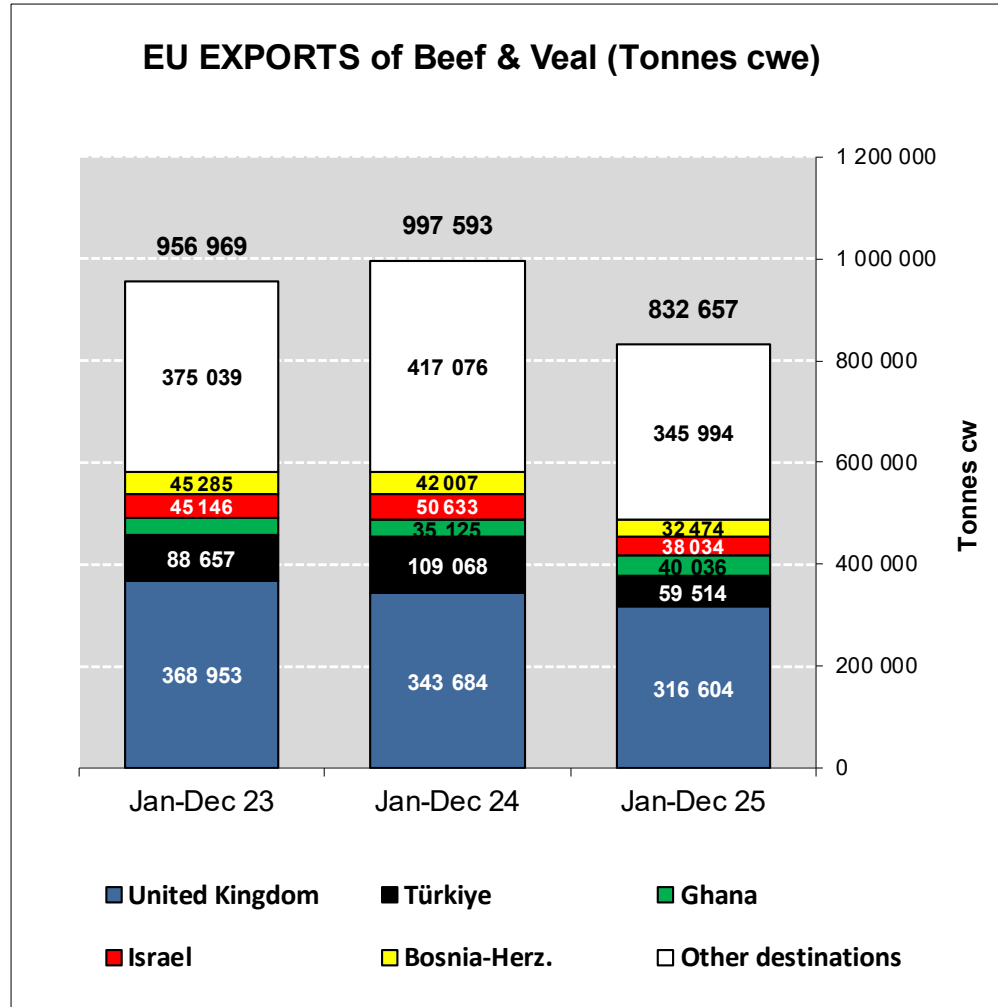
## Beef & Live Animals

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

Destinations	2021		2022		2023		2024		Jan-Dec 25		Compared to Jan-Dec 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	344 633	33.4%	366 323	39.0%	368 953	38.6%	343 684	34.5%	316 604	38.0%	- 7.9%
Türkiye	14 953	1.5%	13 337	1.4%	88 657	9.3%	109 068	10.9%	59 514	7.1%	- 45.4%
Ghana	47 618	4.6%	32 171	3.4%	33 889	3.5%	35 125	3.5%	40 036	4.8%	+ 14.0%
Israel	66 022	6.4%	63 618	6.8%	45 146	4.7%	50 633	5.1%	38 034	4.6%	- 24.9%
Bosnia-Herz.	40 504	3.9%	38 796	4.1%	45 285	4.7%	42 007	4.2%	32 474	3.9%	- 22.7%
Ivory Coast	29 187	2.8%	29 882	3.2%	30 208	3.2%	28 129	2.8%	31 946	3.8%	+ 13.6%
Algeria	24 111	2.3%	25 459	2.7%	11 905	1.2%	30 687	3.1%	31 482	3.8%	+ 2.6%
Switzerland	28 717	2.8%	24 959	2.7%	19 376	2.0%	23 563	2.4%	30 479	3.7%	+ 29.4%
Morocco	11 868	1.2%	8 273	0.9%	25 612	2.7%	35 395	3.5%	24 705	3.0%	- 30.2%
Kosovo	16 478	1.6%	17 018	1.8%	22 684	2.4%	26 606	2.7%	20 291	2.4%	- 23.7%
Canada	20 670	2.0%	19 986	2.1%	15 907	1.7%	17 556	1.8%	14 736	1.8%	- 16.1%
Lebanon	19 527	1.9%	21 026	2.2%	21 627	2.3%	20 502	2.1%	12 060	1.4%	- 41.2%
Hong Kong	44 769	4.3%	10 570	1.1%	21 689	2.3%	17 330	1.7%	10 866	1.3%	- 37.3%
Ukraine	15 078	1.5%	11 969	1.3%	10 064	1.1%	10 770	1.1%	9 552	1.1%	- 11.3%
Norway	18 235	1.8%	12 903	1.4%	5 310	0.6%	4 199	0.4%	9 181	1.1%	+ 118.7%
North Macedonia	4 199	0.4%	9 888	1.1%	9 876	1.0%	11 412	1.1%	8 993	1.1%	- 21.2%
<i>Other Destinations</i>	<i>284 408</i>	<i>27.6%</i>	<i>232 591</i>	<i>24.8%</i>	<i>180 780</i>	<i>18.9%</i>	<i>190 927</i>	<i>19.1%</i>	<i>141 701</i>	<i>17.0%</i>	
<b>Total</b>	<b>1 030 978</b>		<b>938 770</b>		<b>956 969</b>		<b>997 593</b>		<b>832 657</b>		
% change			- 9%		+ 2%		+ 4%		- 16.5%		

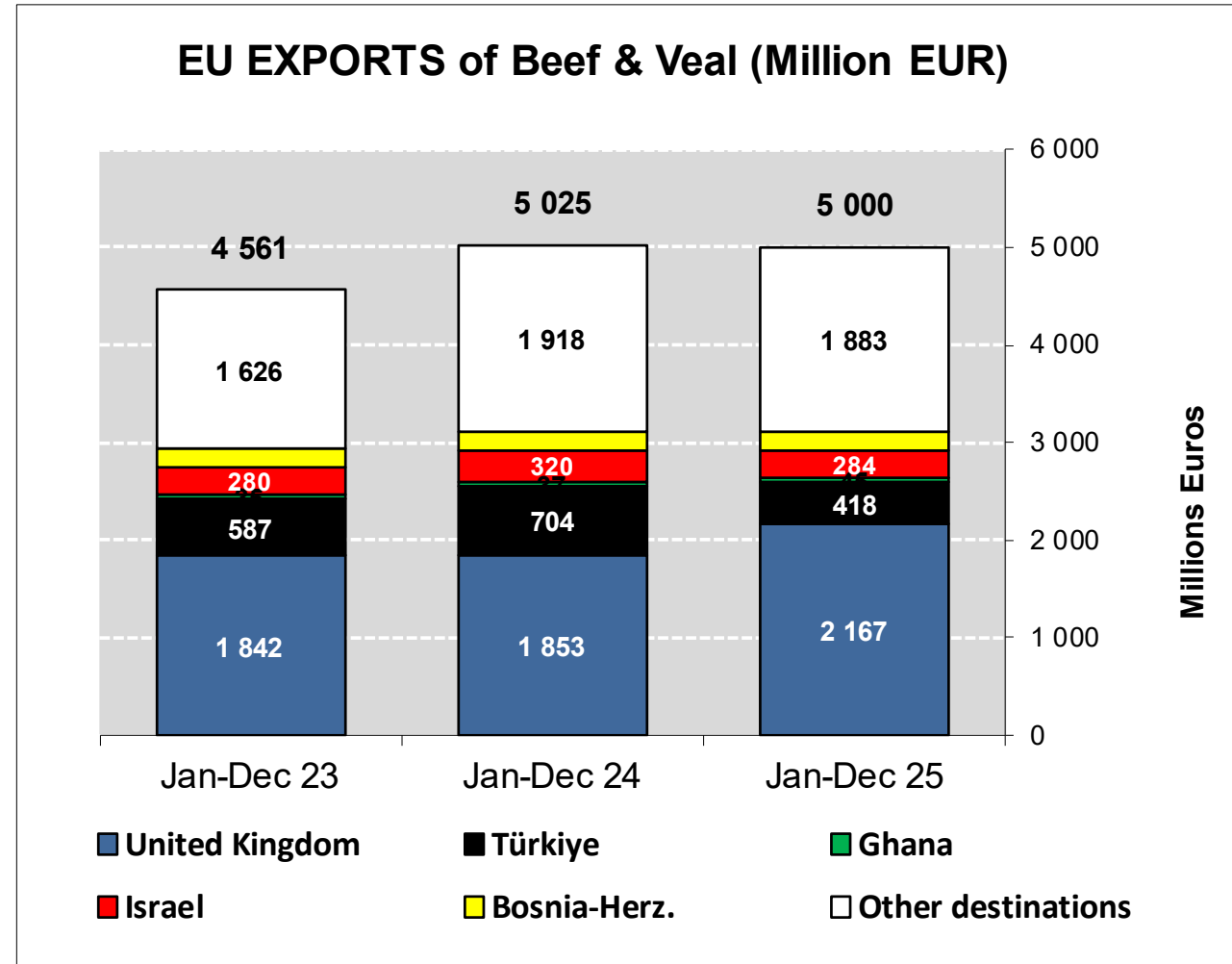
# TRADE

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



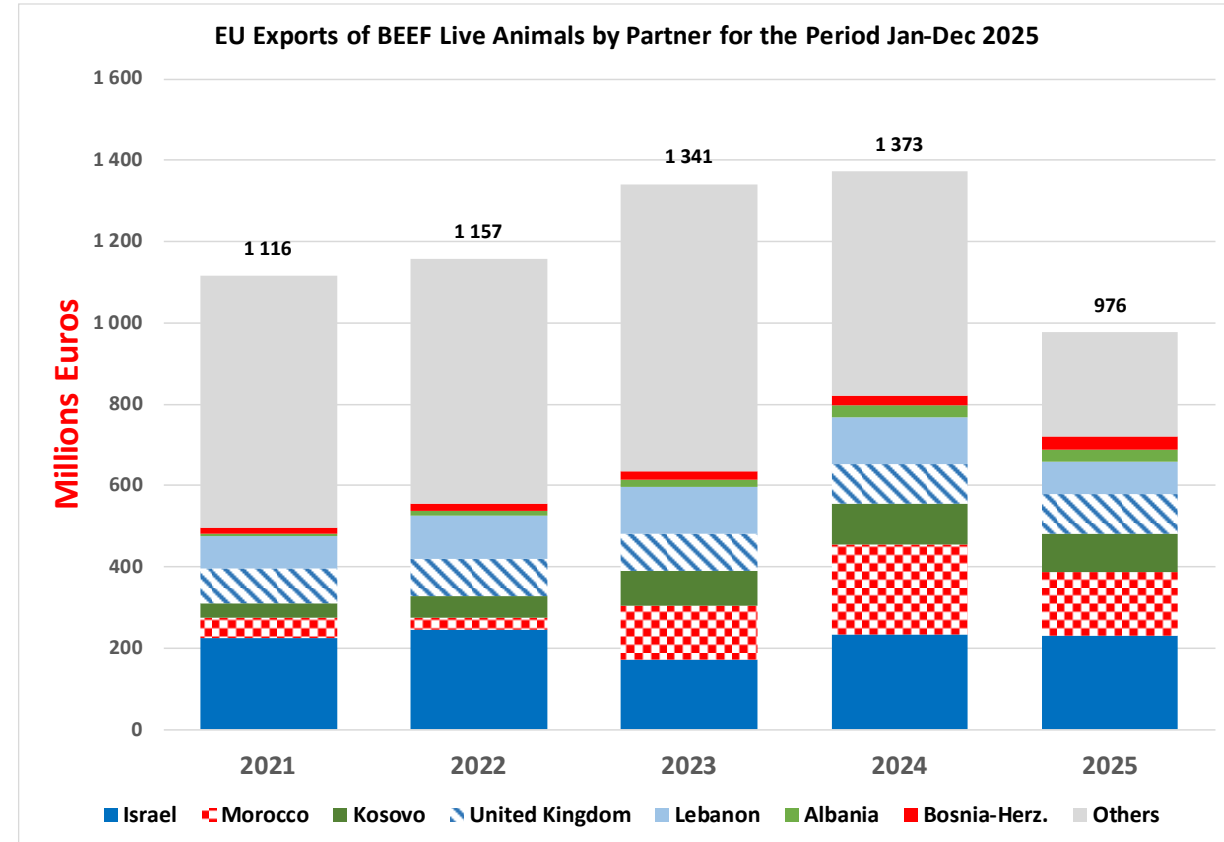
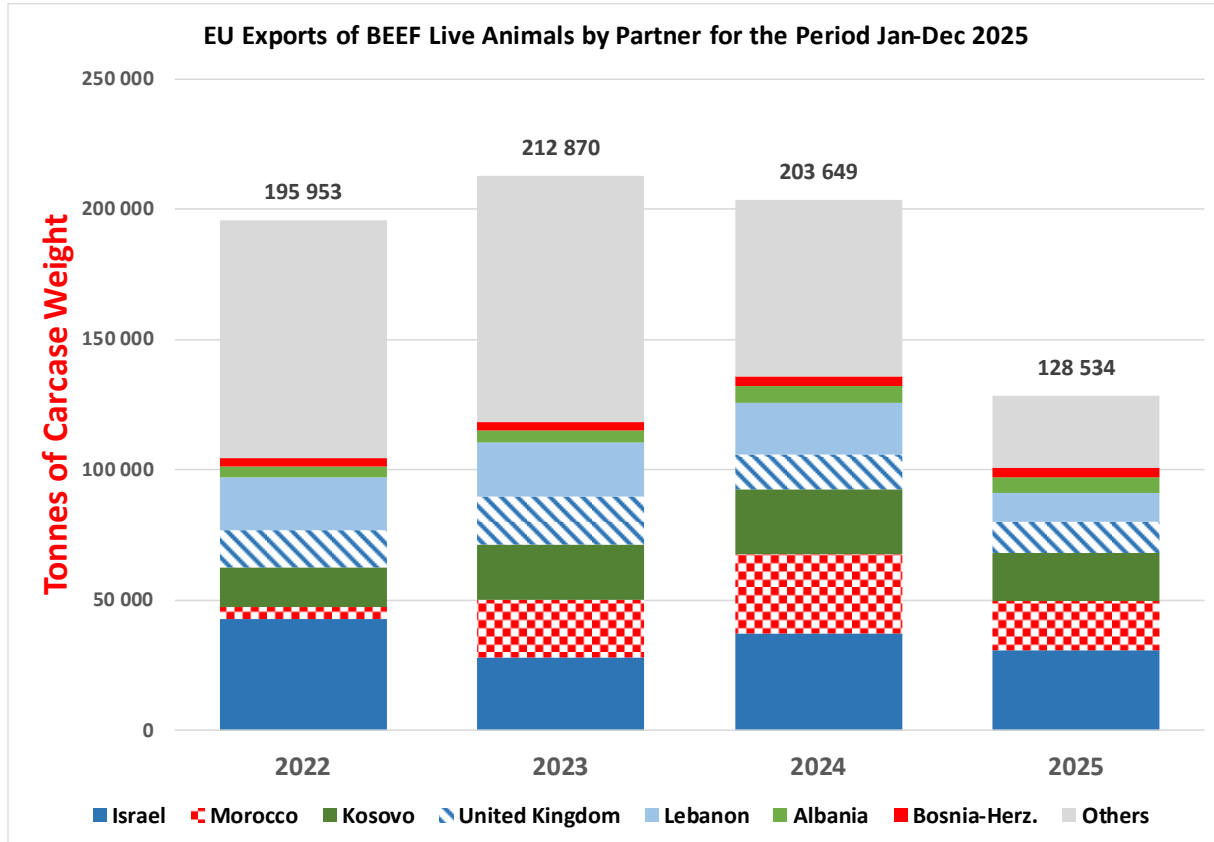
# EU EXPORTS

Beef & Live Animals (Excl Fats)



# 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)

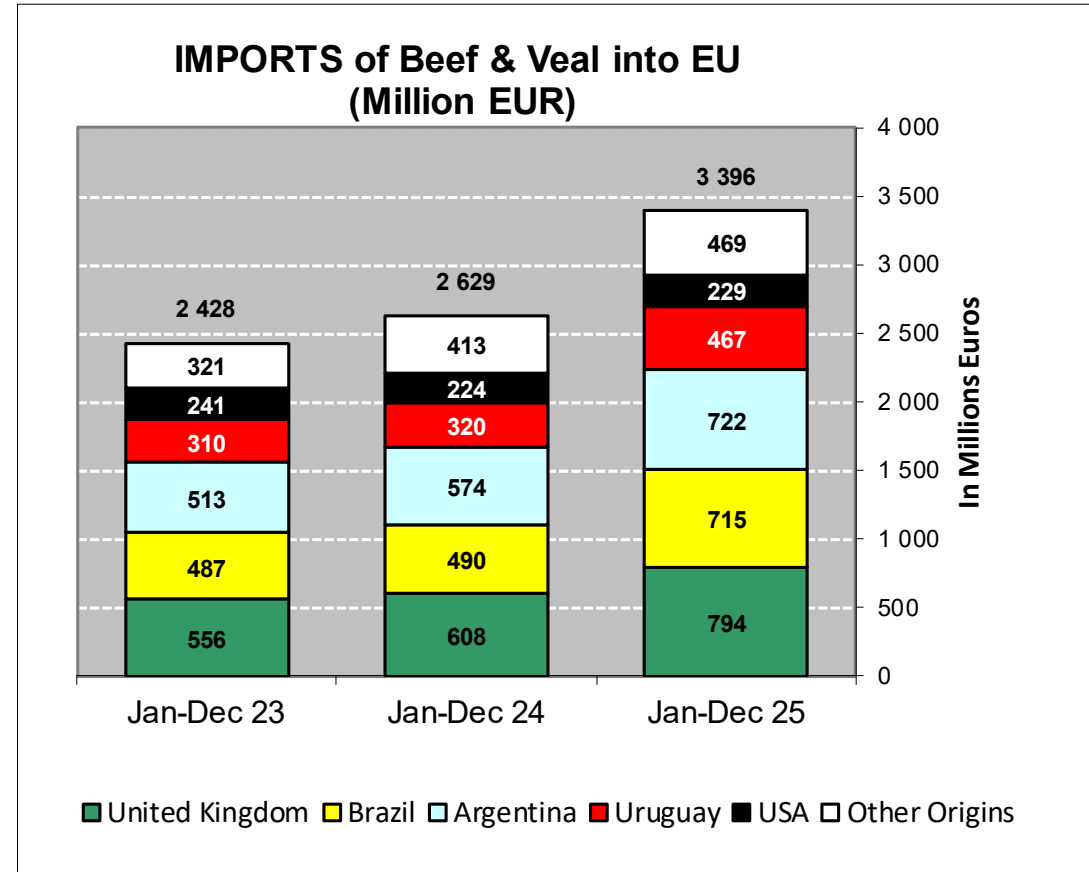
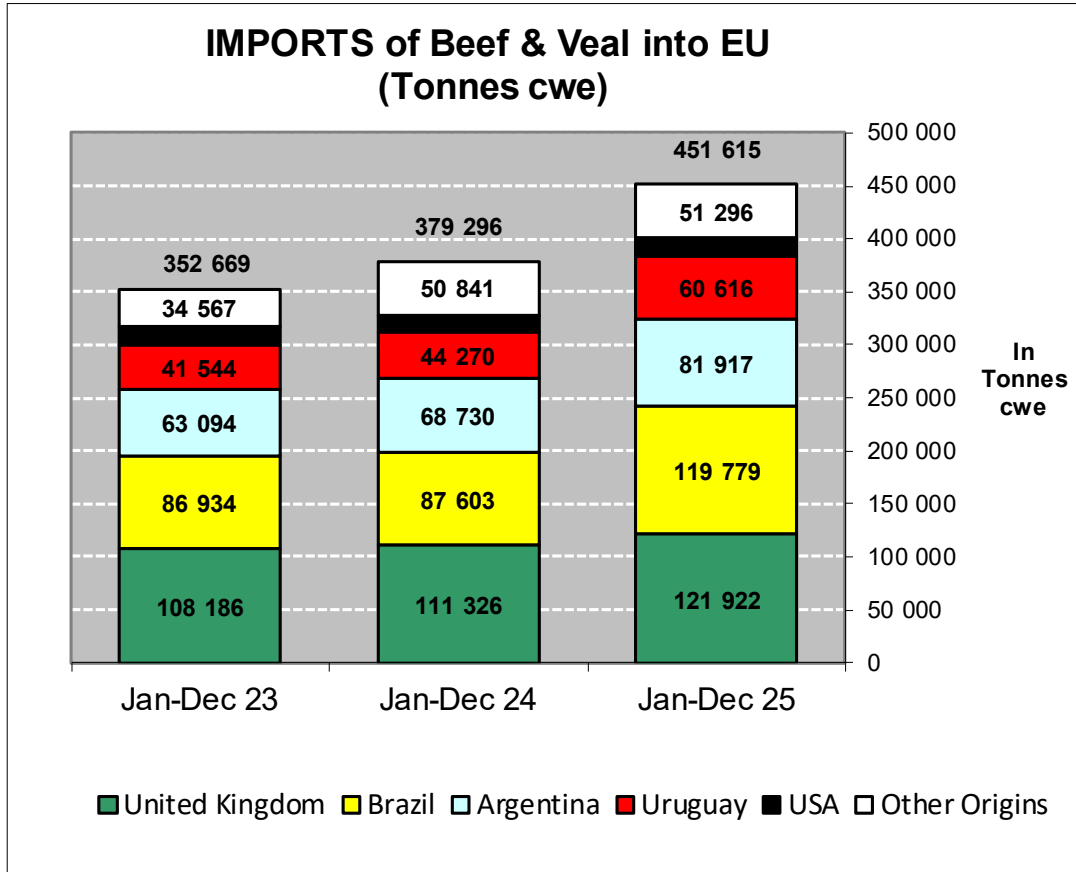
Origins	2021		2022		2023		2024		Jan-Dec 25		Compared to Jan-Dec 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	87 596	28.3%	118 759	33.0%	108 186	30.7%	111 326	29.4%	121 922	27.0%	+ 9.5%
Brazil	81 737	26.4%	86 512	24.0%	86 934	24.7%	87 603	23.1%	119 779	26.5%	+ 36.7%
Argentina	52 300	16.9%	62 584	17.4%	63 094	17.9%	68 730	18.1%	81 917	18.1%	+ 19.2%
Uruguay	42 669	13.8%	37 619	10.5%	41 544	11.8%	44 270	11.7%	60 616	13.4%	+ 36.9%
USA	14 910	4.8%	17 269	4.8%	18 345	5.2%	16 526	4.4%	16 085	3.6%	- 2.7%
Namibia	1 996	0.6%	5 168	1.4%	7 903	2.2%	15 547	4.1%	13 007	2.9%	- 16.3%
Australia	8 925	2.9%	8 385	2.3%	7 700	2.2%	8 352	2.2%	9 381	2.1%	+ 12.3%
New Zealand	4 380	1.4%	5 202	1.4%	4 531	1.3%	5 847	1.5%	7 635	1.7%	+ 30.6%
Paraguay	3 933	1.3%	5 404	1.5%	4 774	1.4%	5 303	1.4%	6 207	1.4%	+ 17.1%
Botswana	331	0.1%	928	0.3%	1 606	0.5%	7 718	2.0%	5 588	1.2%	- 27.6%
Switzerland	4 714	1.5%	4 730	1.3%	3 627	1.0%	3 793	1.0%	3 605	0.8%	- 5.0%
Canada	1 816	0.6%	2 172	0.6%	1 456	0.4%	1 102	0.3%	1 578	0.3%	+ 43.2%
Japan	1 478	0.5%	2 160	0.6%	836	0.2%	1 171	0.3%	1 412	0.3%	+ 20.6%
Serbia	963	0.3%	1 058	0.3%	812	0.2%	641	0.2%	753	0.2%	+ 17.5%
North Macedonia	61	0.0%	33	0.0%	29	0.0%	50	0.0%	699	0.2%	+++
Chile	238	0.1%	378	0.1%	365	0.1%	346	0.1%	594	0.1%	+ 71.6%
Other Destinations	1 220	0.4%	1 633	0.5%	928	0.3%	971	0.3%	837	0.2%	
<b>Total</b>	<b>309 267</b>		<b>359 994</b>		<b>352 669</b>		<b>379 296</b>		<b>451 615</b>		
% change			+ 16%		- 2%		+ 8%		+ 19.1%		

# TRADE

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

# EU IMPORTS

## Beef & Live Animals (Excl Fats)

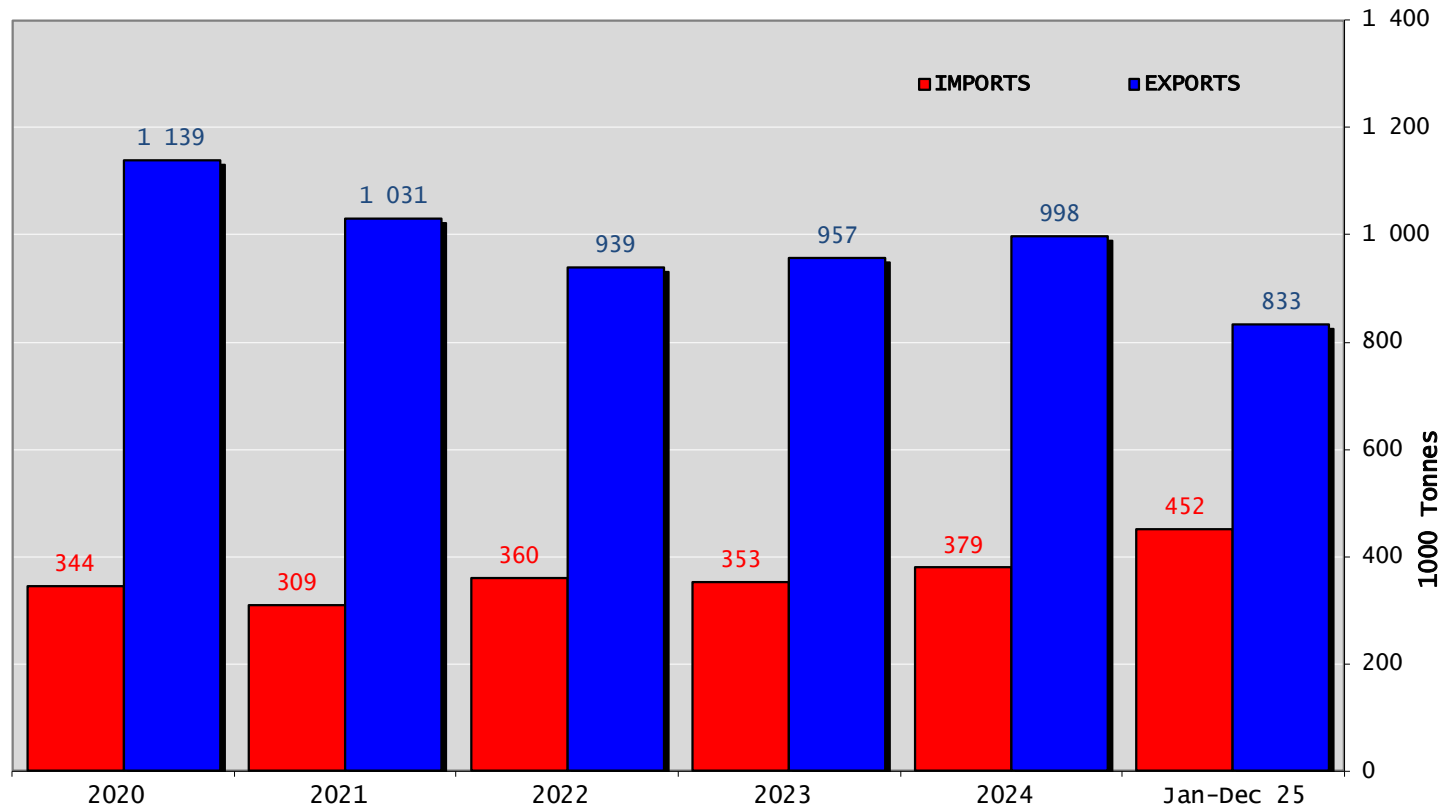


# TRADE

# EUTRADE BALANCE

## Beef & Live Animals

### Trade Balance of Beef Products and Live Animals

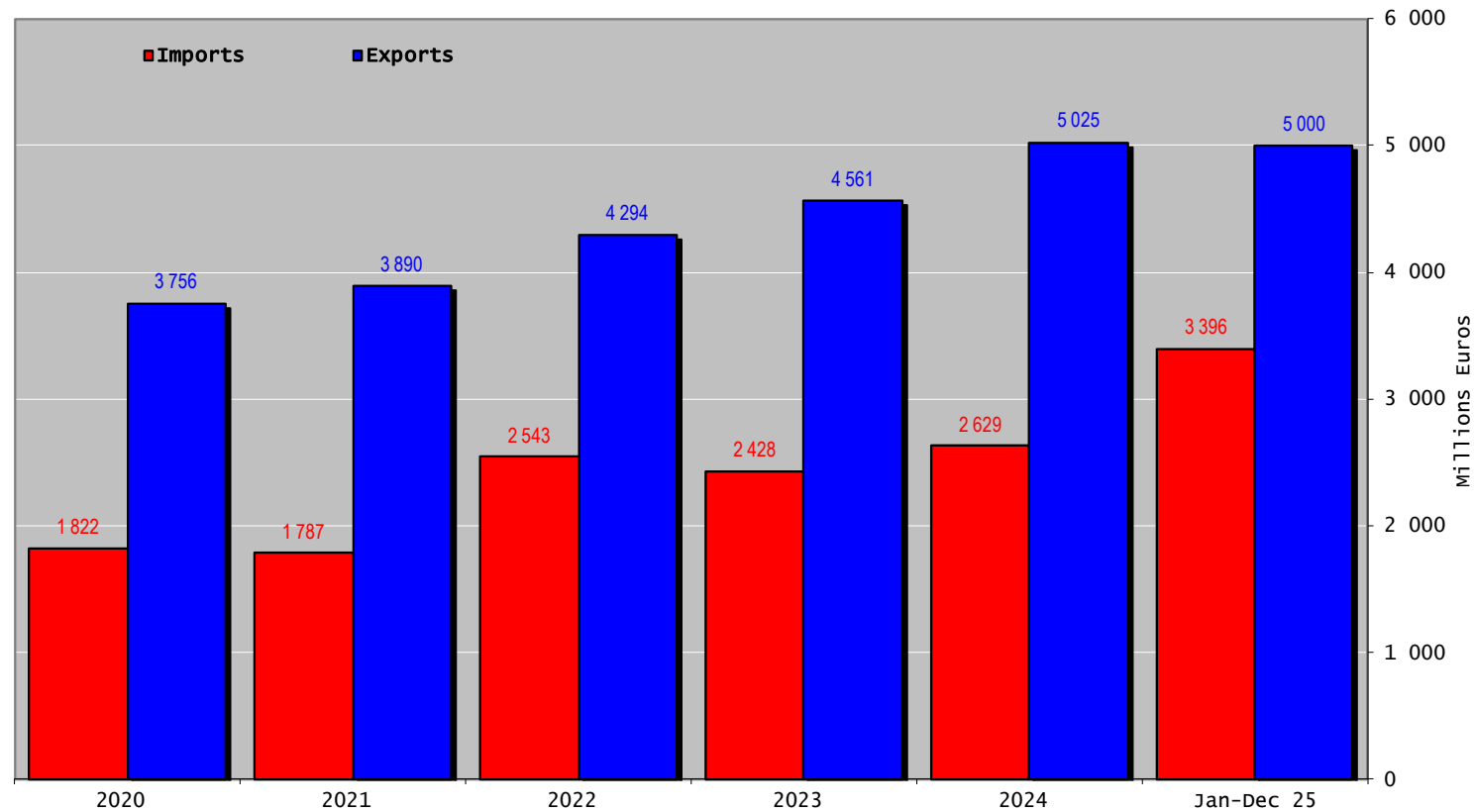


# TRADE

# EU TRADE BALANCE

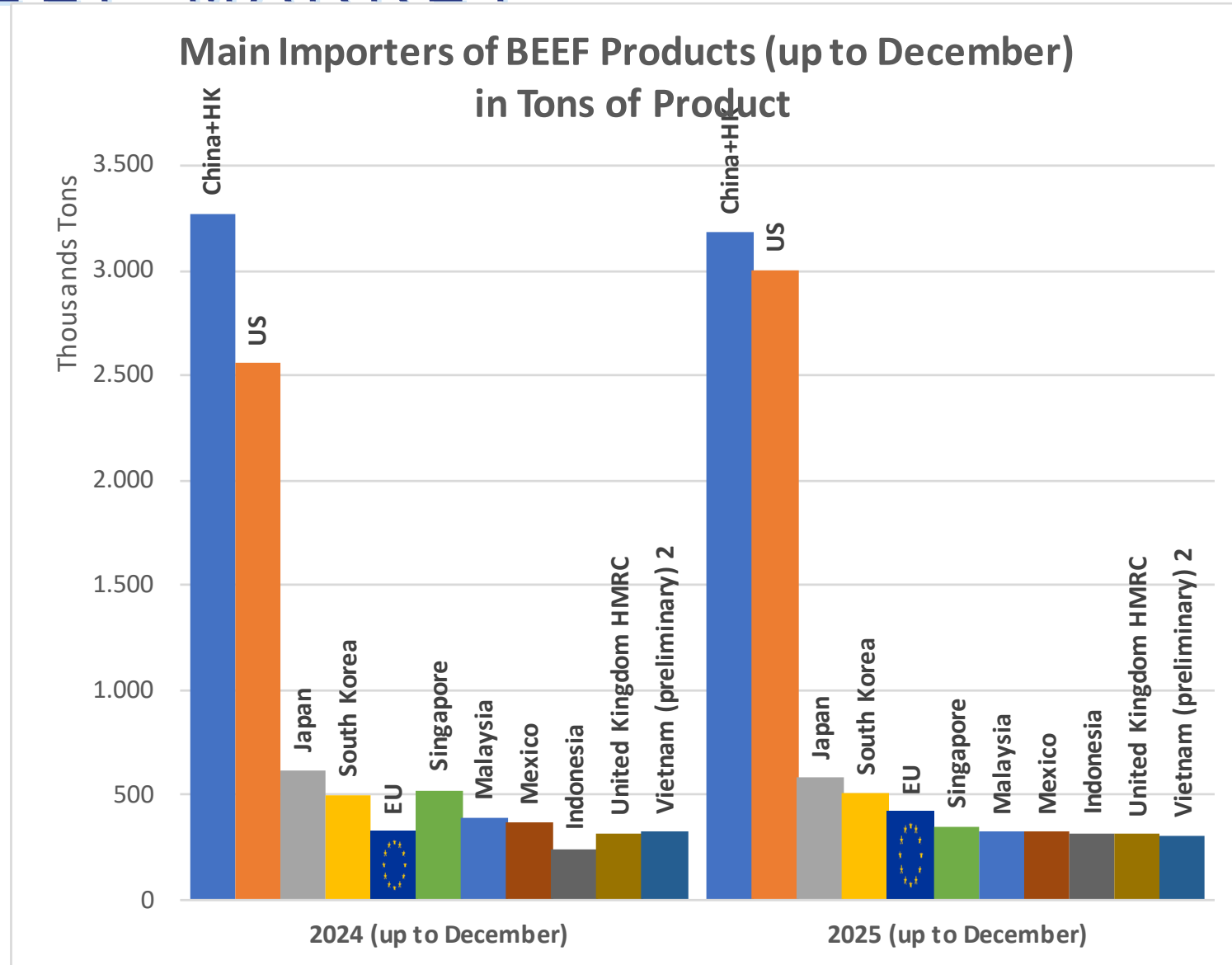
## Beef & Live Animals

### Trade Balance of Beef Products and Live Animals



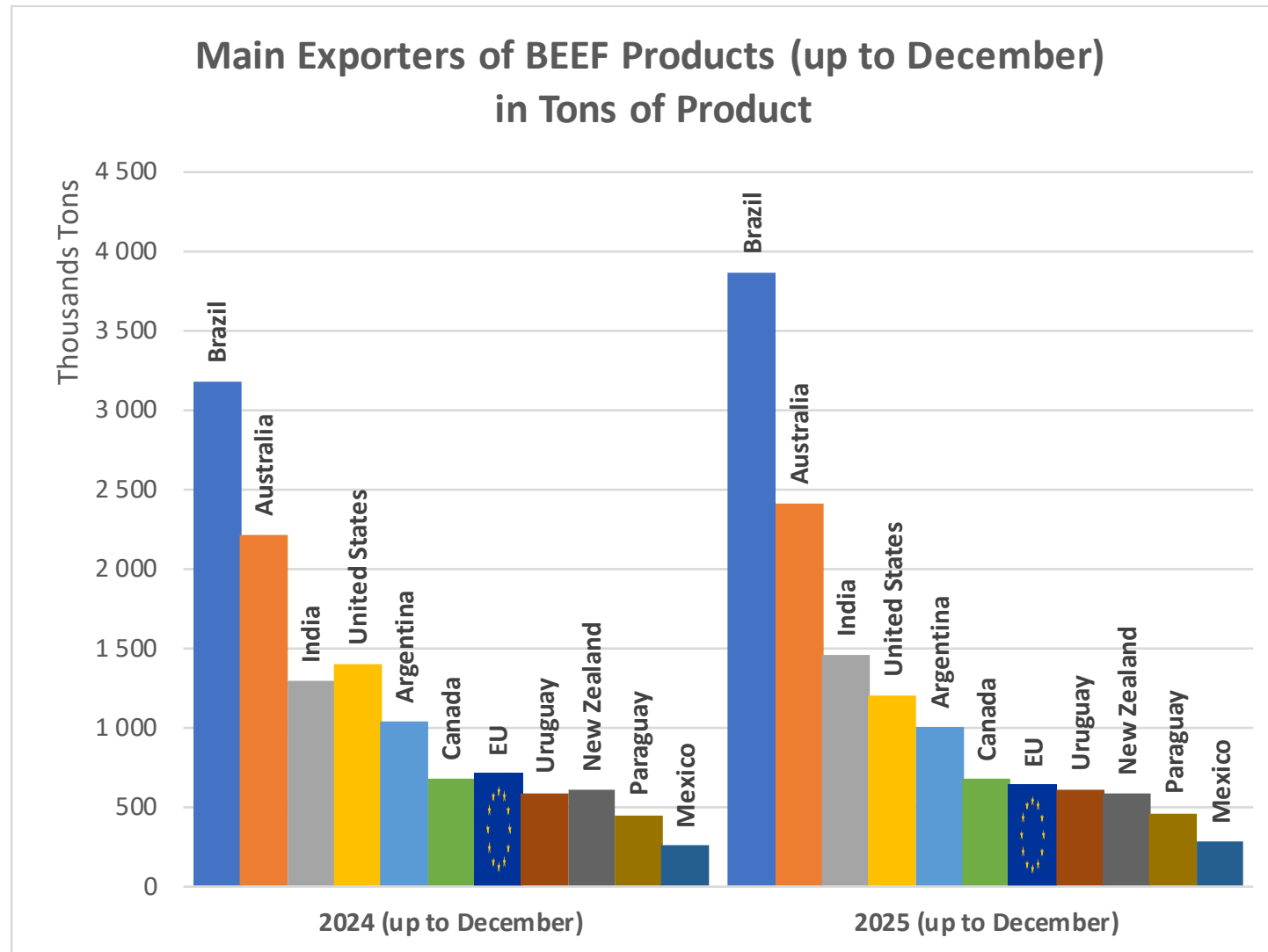
# WORLD BEEF MARKET

## BEEF MAIN IMPORTERS



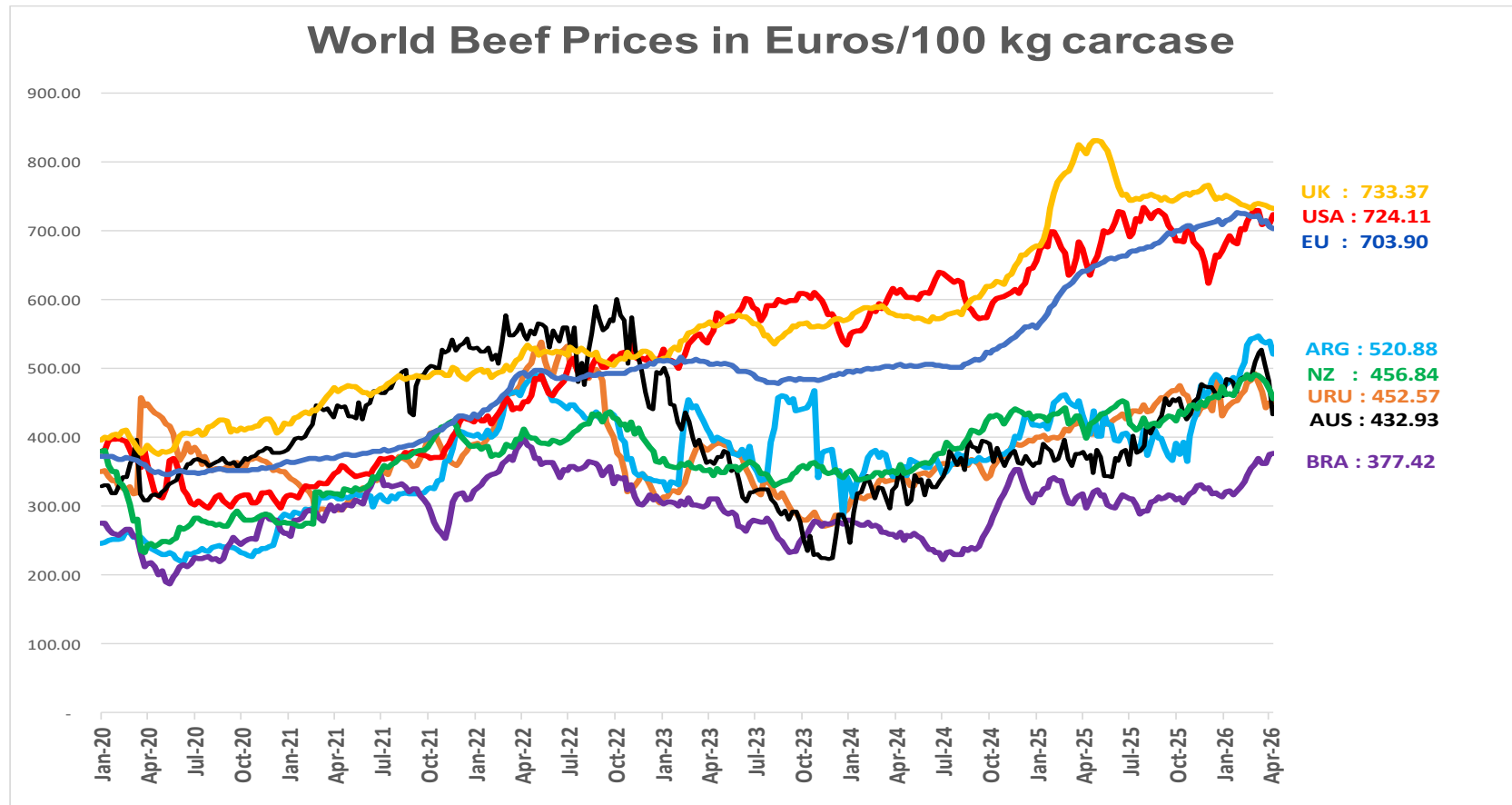
# WORLD BEEF MARKET

## 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](#)

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/>