

# BEEF & VEAL MARKET SITUATION

## 18 June 2026

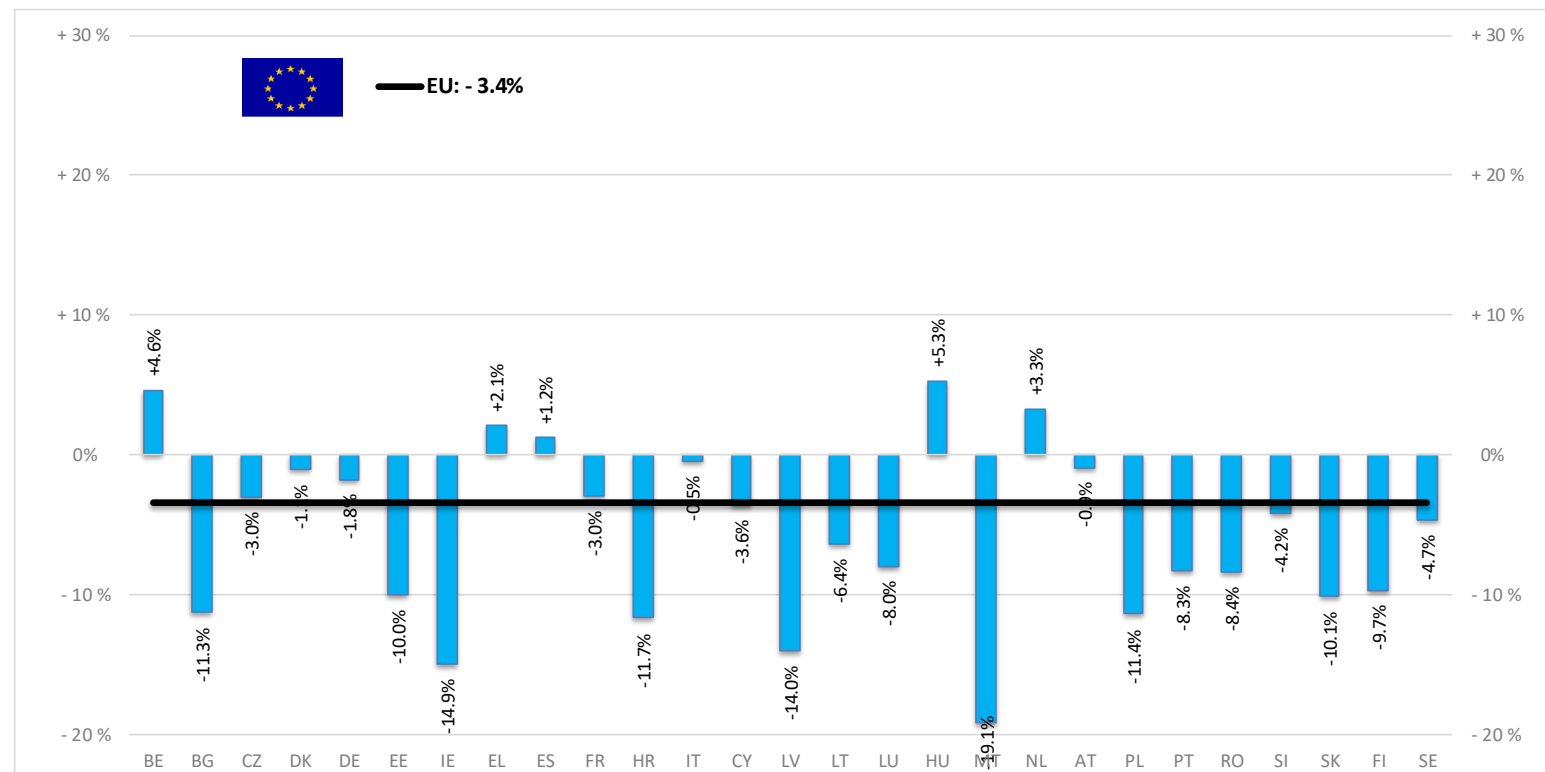


# PRODUCTION

# % EVOLUTION HEADS

HEADS	Jan-Mar 26/25
	<b>EU</b>
Bull	-1.6%
Bullock	-8.7%
Cow	-2.8%
Heifer	-5.2%
Calf	-2.3%
Young cattle	-8.0%
<b>Bovine meat</b>	<b>-3.4%</b>

Estimates for last month of period : LV HU PL SI



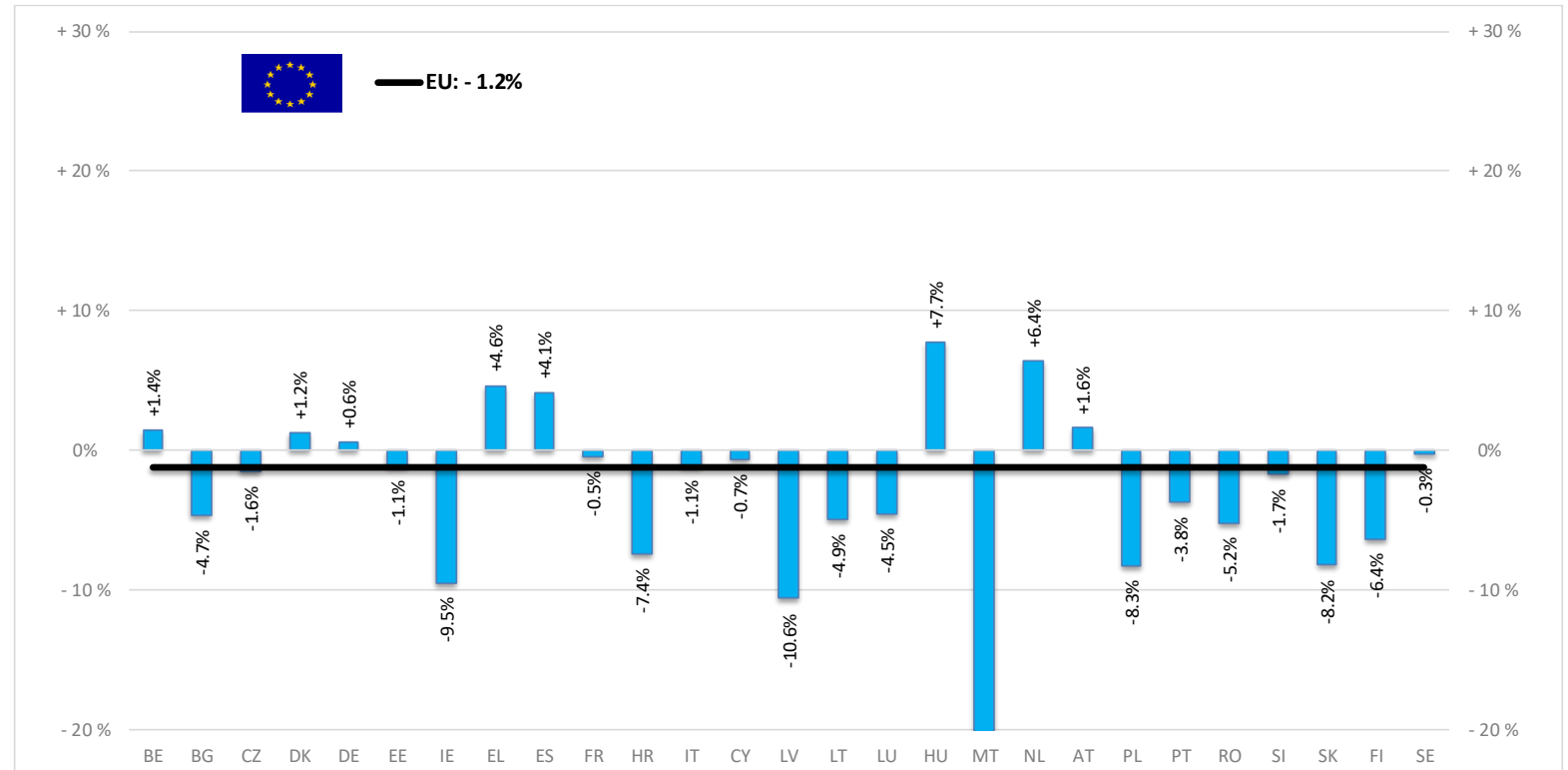
Source : Eurostat - Slaughtering in slaughterhouses - monthly data (apro\_mt\_pwgmt)

# PRODUCTION

# % EVOLUTION TONNES

TONS	Jan-Mar 26/25
	<b>EU</b>
Bull	+0.8%
Bullock	-2.7%
Cow	-1.8%
Heifer	-2.6%
Calf	-0.4%
Young cattle	-6.5%
Bovine meat	-1.2%

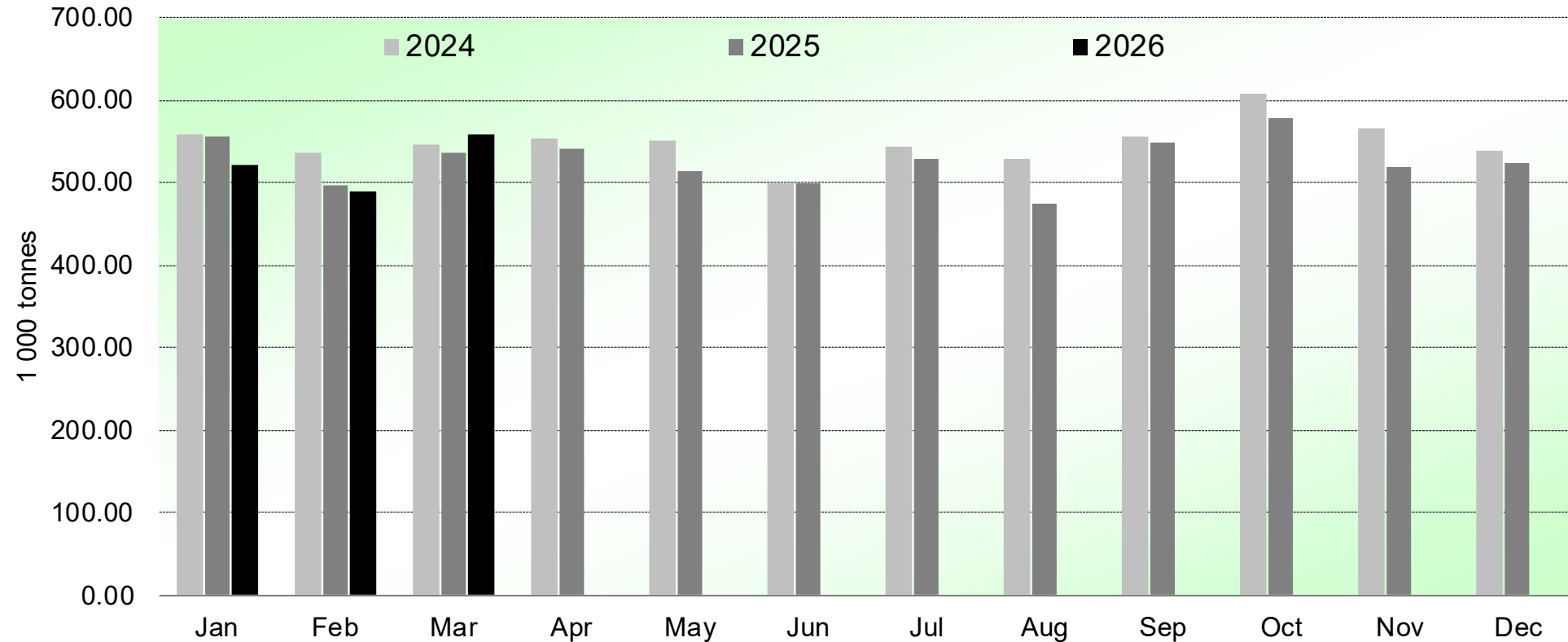
Estimates for last month of period : LV HU PL SI



# PRODUCTION

HISTORIC  
TONNES

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



# PRICES CARCASSES

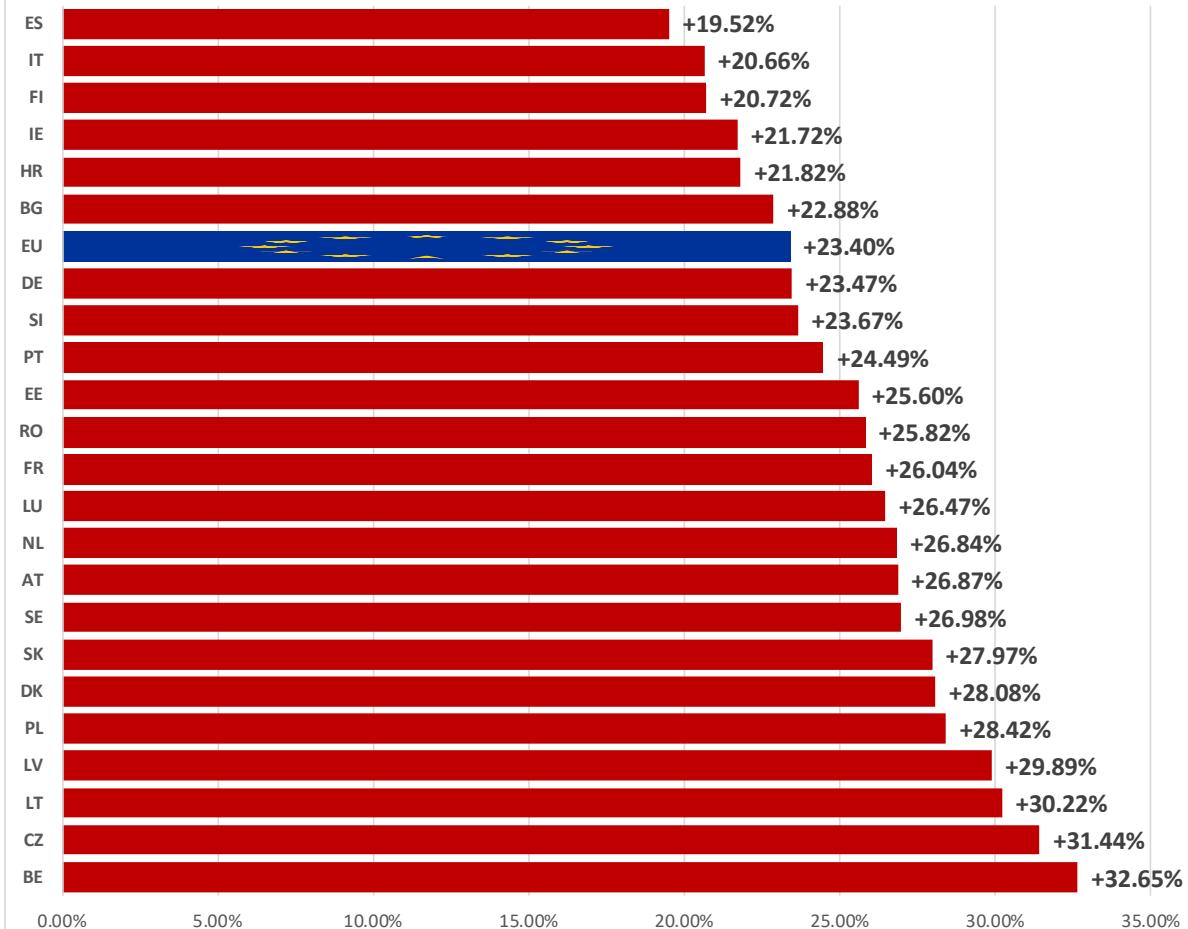
Dashboard

EU Prices week		23	Evolution since last week	Evolution since last month	Evolution since last year	
<b>Carcasse</b>	Average A/C/Z -R3	646.6	€/100 kg	- 0.8%	- 4.9%	- 2.0%
	Young Bovines (Z)	649.2		- 2.9%	- 6.5%	+ 1.0%
	Young Bulls (A)	642.3		- 0.1%	- 4.6%	- 0.8%
	Steers (C)	642.3		- 3.8%	- 6.9%	- 14.7%
	Cows (D)	584.7		- 0.2%	- 3.0%	- 2.3%
	Heifers (E)	691.5		- 0.4%	- 1.9%	+ 3.6%
	Calves slaughtered <8M	760.9		- 0.6%	- 3.9%	+ 3.6%
<b>Live Animals</b>	Male Calves Dairy Type	312.1	€/head	- 0.4%	- 1.8%	+ 9.9%
	Male Calves Beef Type	490.2		- 1.2%	- 3.1%	+ 10.9%
	Young Store Cattle	5.08		+ 0.1%	- 4.2%	+ 1.4%
	Yearling Male Store Cattle	6.53	€/kg	+ 4.1%	+ 6.0%	- 3.2%
	Yearling Female Store Cattle	5.20		+ 1.6%	+ 0.7%	+ 6.9%

# PRICES CARCASSES

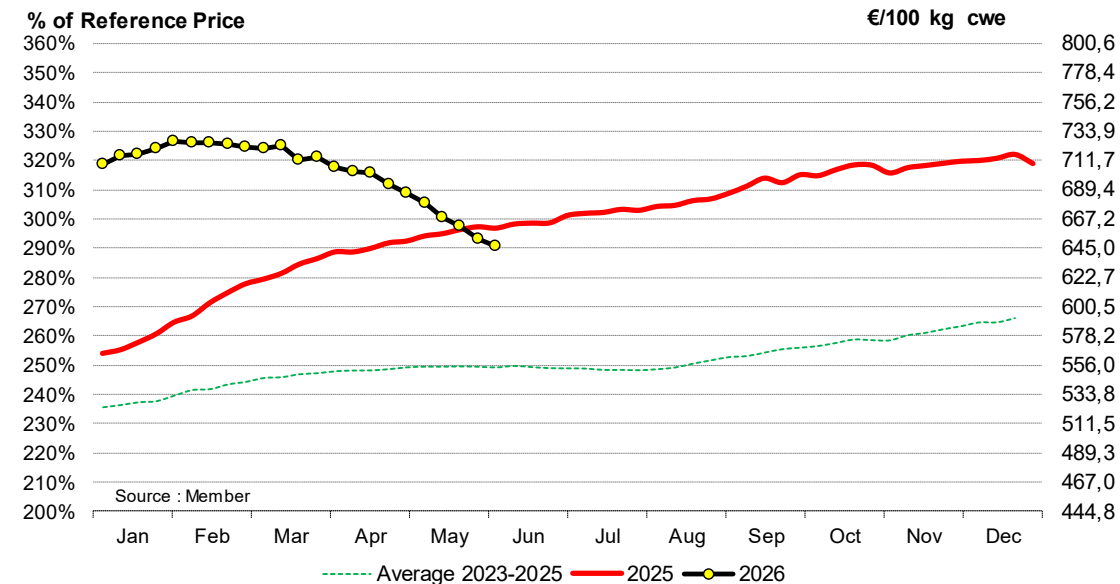
# EU EVOLUTION A/C/Z.R3

EU ACZ R3 Price Comparison between average monthly price  
June 2025 - May 2026 compared to June 2024 - May 2025



ACZ - R3 > Week 23 2026

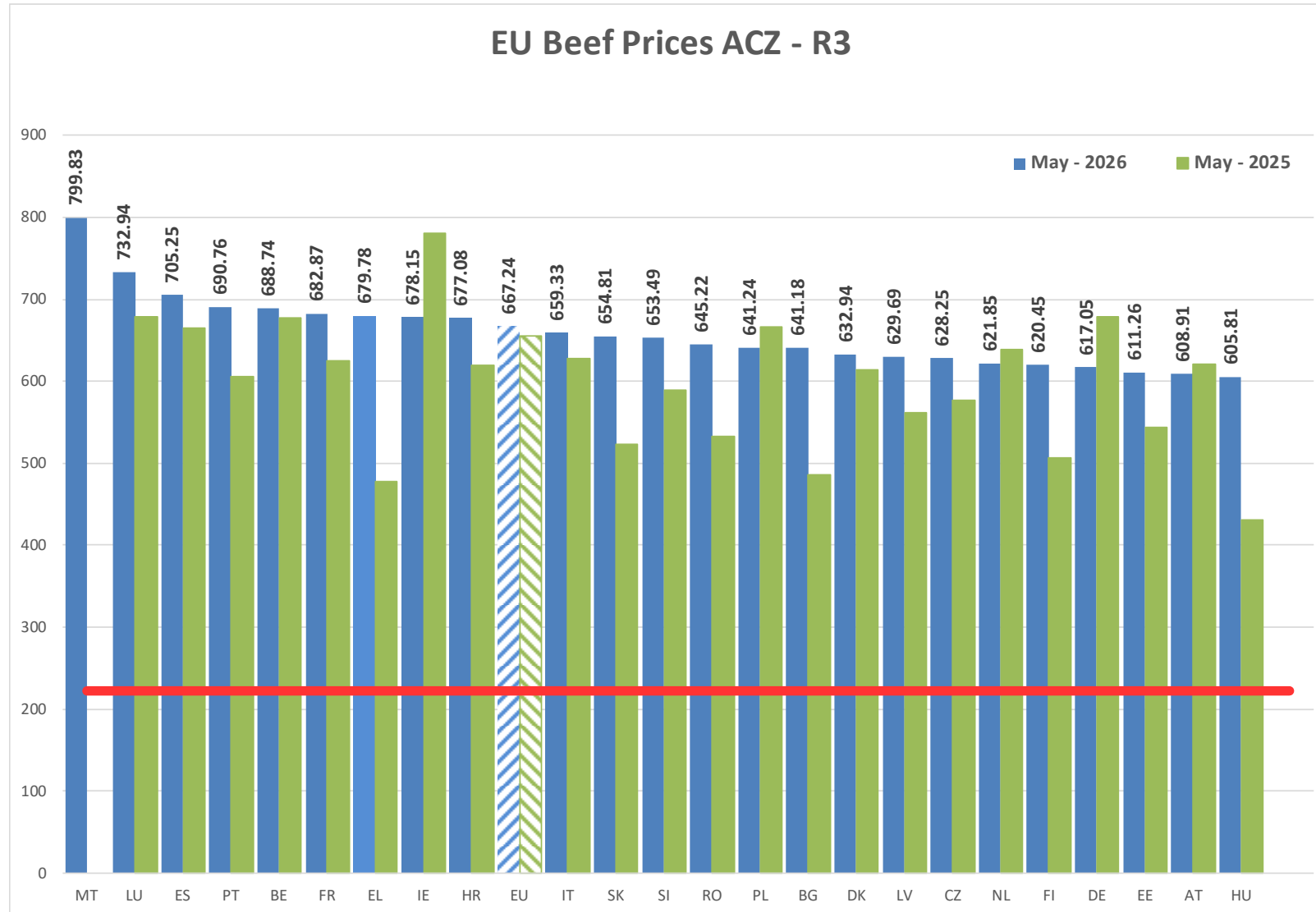
Male bovines carcasses ACZ - R3 > Week 23 2026



Price in week 23	<b>646,62</b>	Average price in May 2026	<b>667,24</b>
% change y/y :	<b>- 2,1%</b>	% change y/y :	<b>+1,7%</b>
% of ref. price in week 23	<b>290,7%</b>		

# PRICES CARCASSES

# EU EVOLUTION A/C/Z.R3

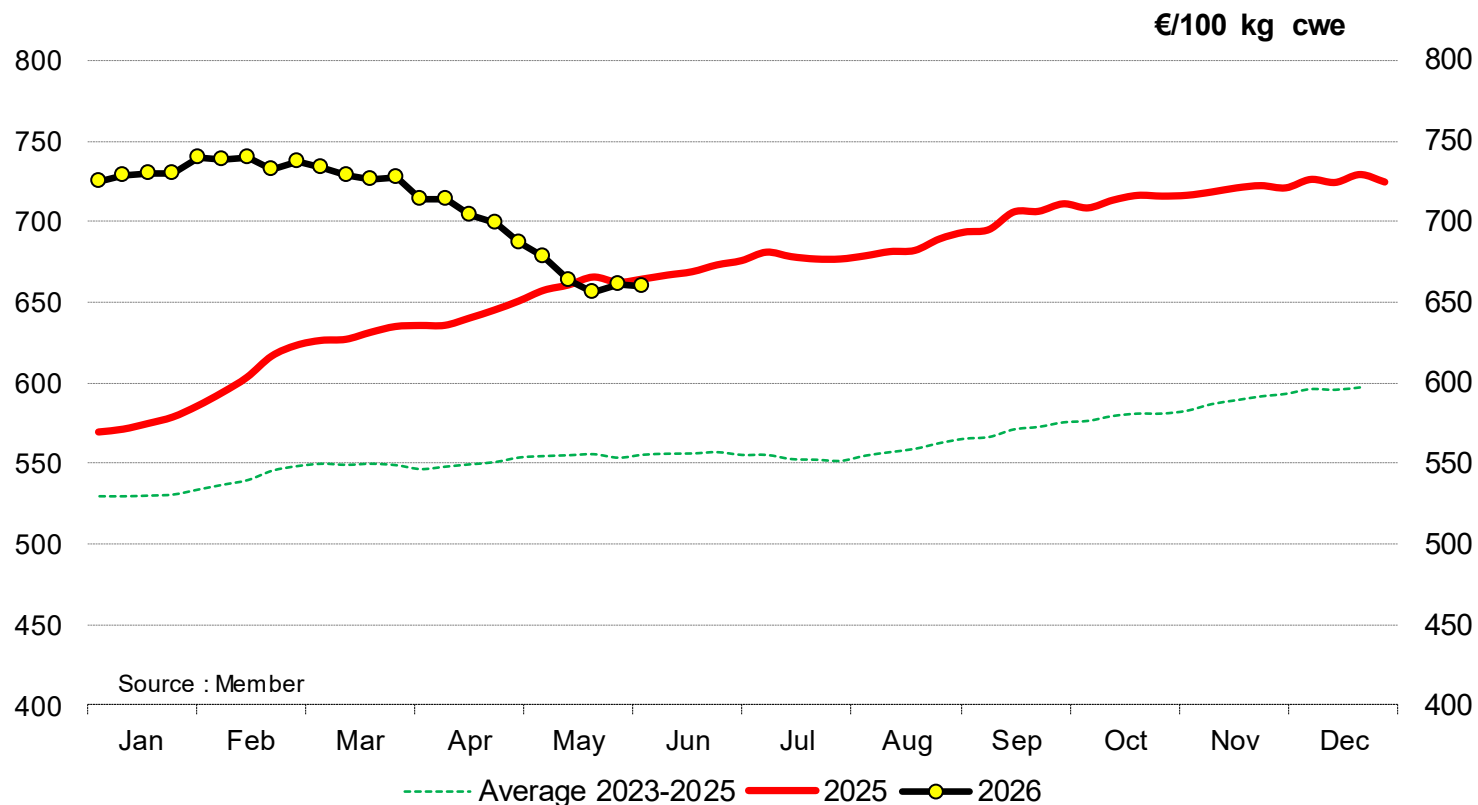


# PRICES CARCASSES

# EU EVOLUTION YOUNG BULL – A.R3

A - R 3 > Week 23 2026

Young bovines A - R 3 > Week 23 2026



Price in week 23 **659,91**  
% change y/y : **-0,7%**

Average price in May 2026 **667,12**  
% change y/y : **+1,1%**

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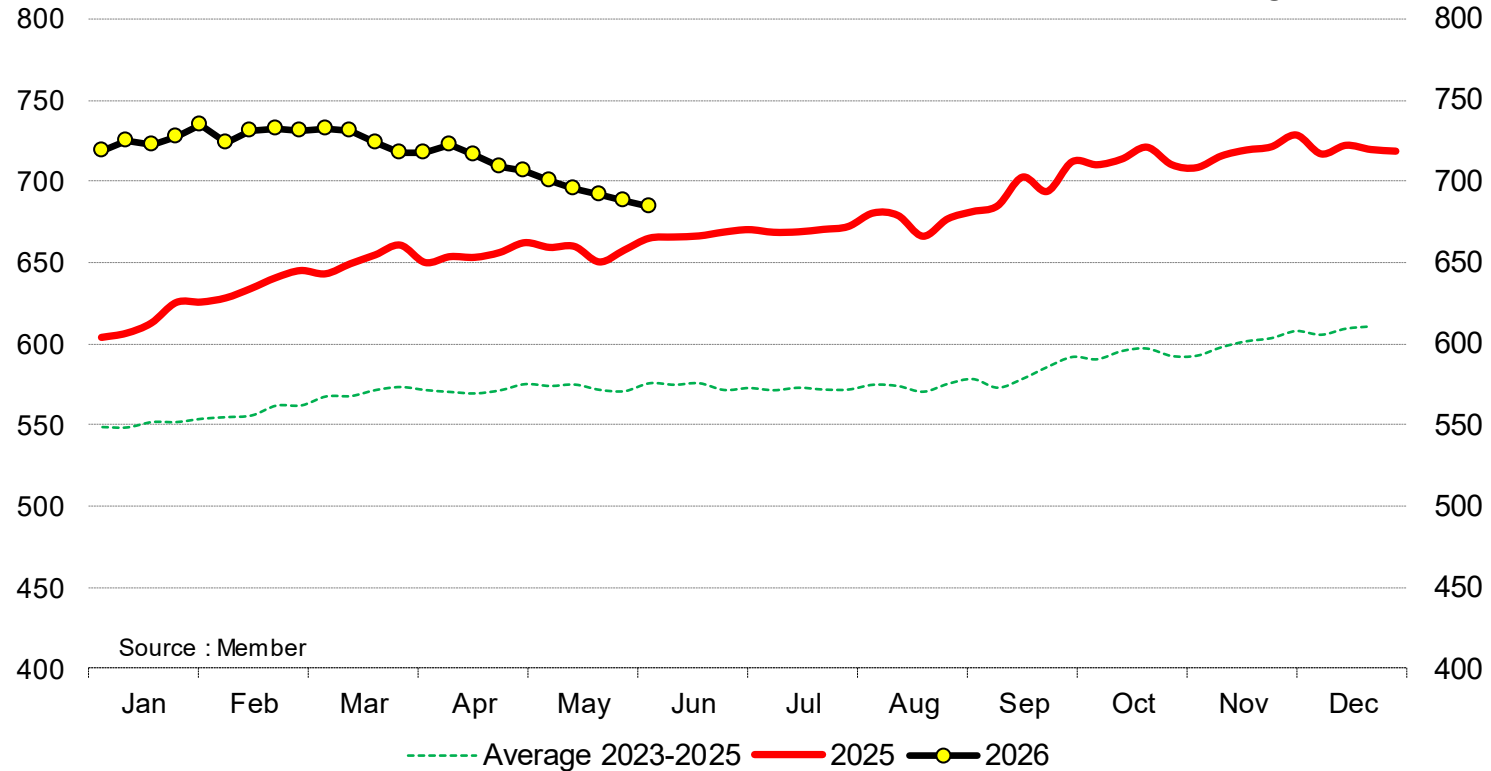
# PRICES CARCASSES

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

Z - R 3 > Week 23 2026

Young bovines 8-12 months Z - R 3 > Week 23 2026

€/100 kg cwe



Source : Member

Price in week 23 **683,93**  
% change y/y : **+ 2,8%**

Average price in May 2026 **695,05**  
% change y/y : **+5,7%**

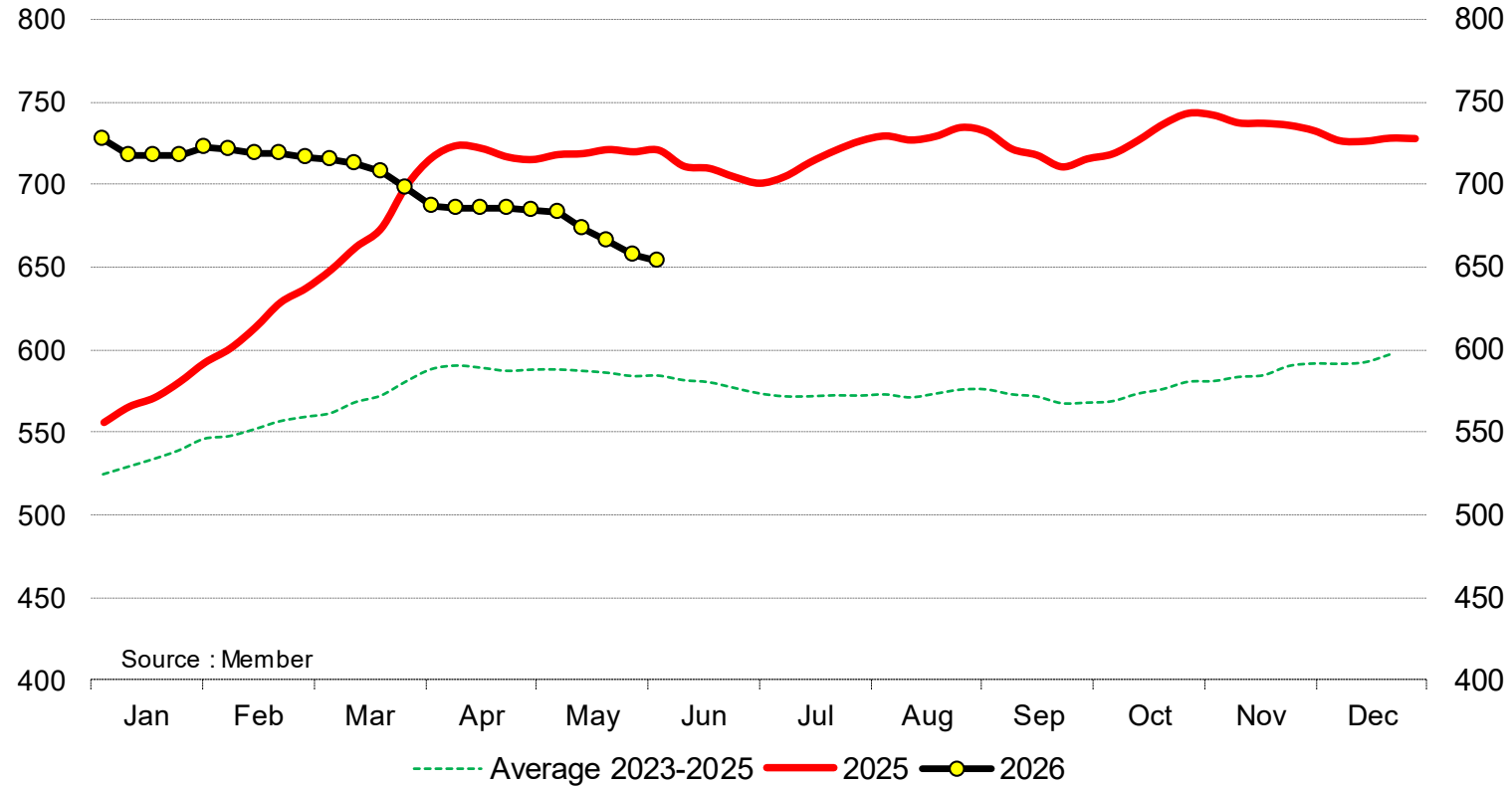
# PRICES CARCASSES

# E.U. EVOLUTION STEER – C.R3

C - R 3 > Week 23 2026

Bullocks C - R 3 > Week 23 2026

€/100 kg cwe



Source : Member

Price in week 23 **653,75**  
% change y/y : **- 10,3%**

Average price in May 2026 **670,92**  
% change y/y : **-6,6%**

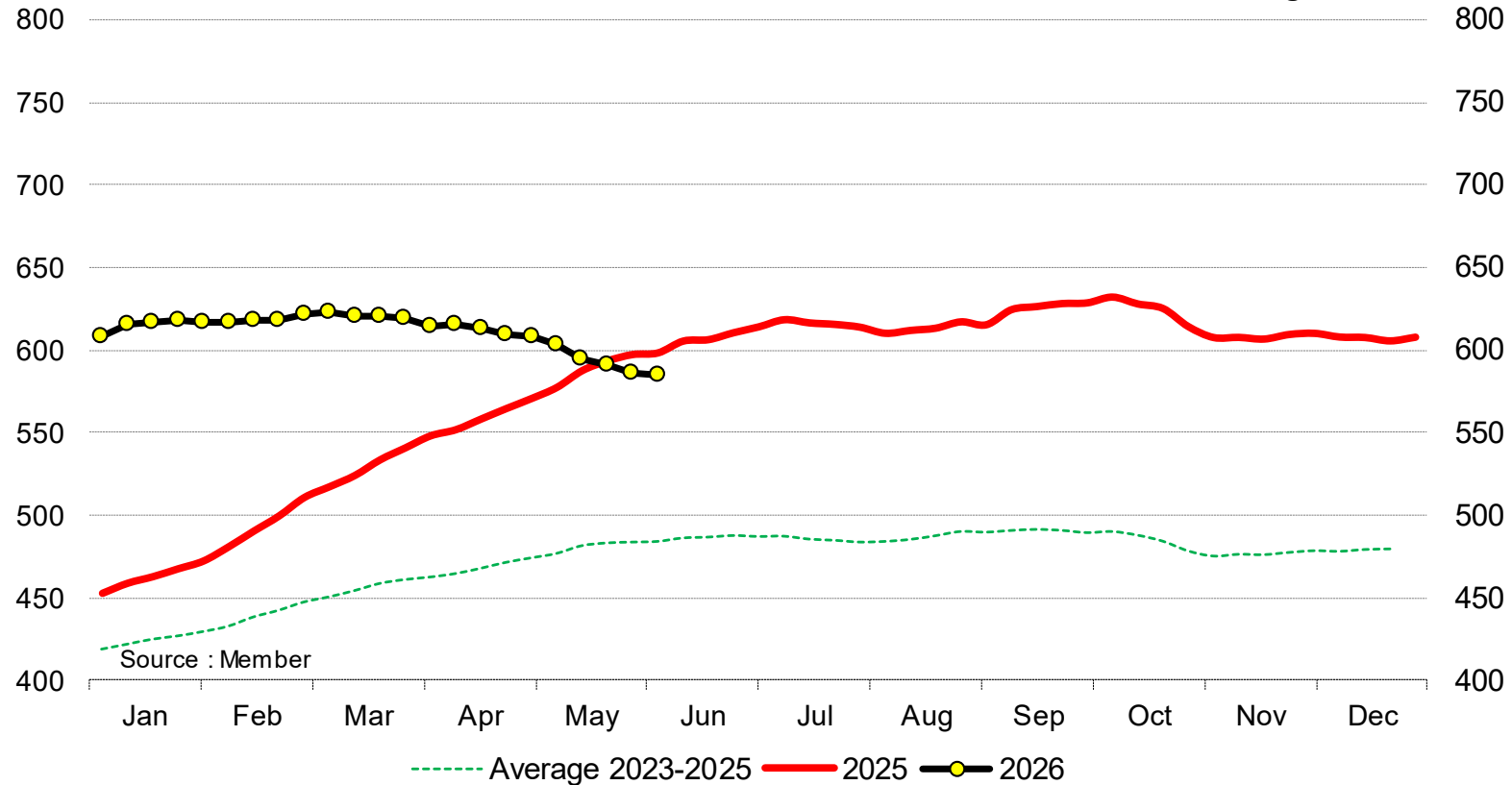
# PRICES CARCASSES

E.U. EVOLUTION  
COW – D.O3

D - O 3 > Week 23 2026

Cows D - O 3 > Week 23 2026

€/100 kg cwe



Price in week 23 **584,77**  
% change y/y : **- 2,3%**

Average price in May 2026 **594,82**  
% change y/y : **+1,4%**

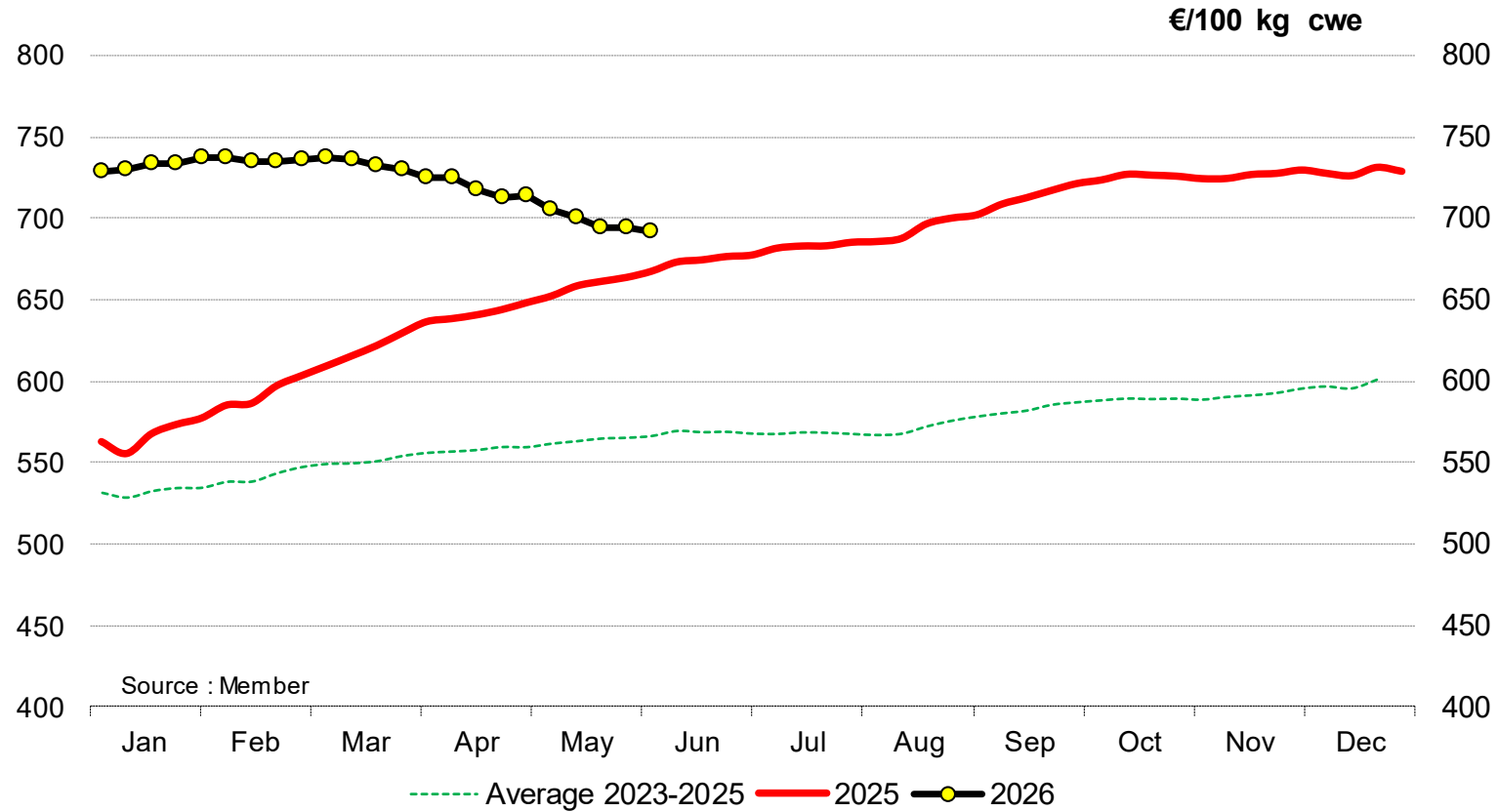
18 June 2026

# PRICES CARCASSES

# EU EVOLUTION HEIFER – E.R3

E - R 3 > Week 23 2026

Cows E - R 3 > Week 23 2026



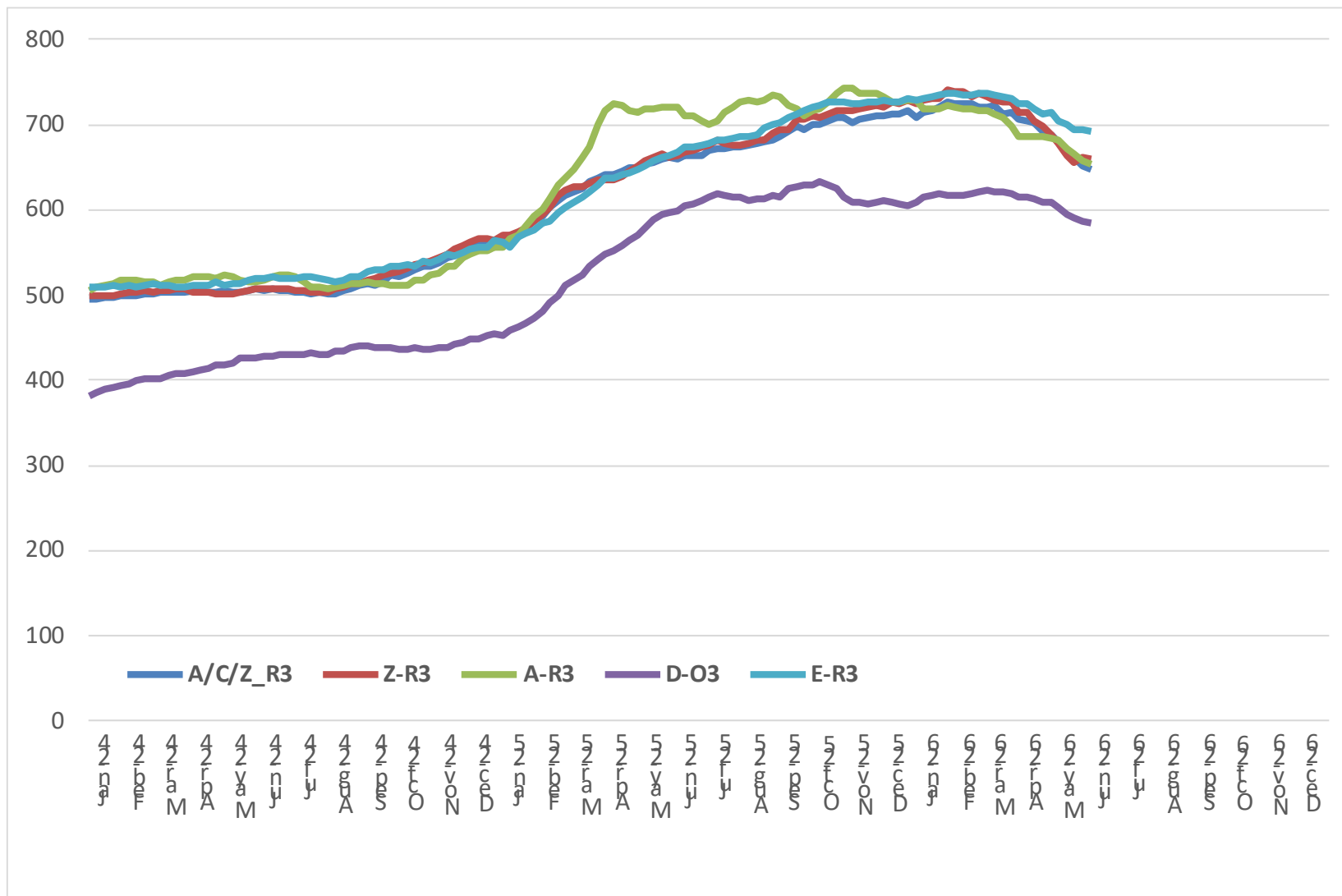
Price in week 23 **691,59**  
% change y/y : **+ 3,5%**

Average price in May 2026 **700,10**  
% change y/y : **+6,5%**

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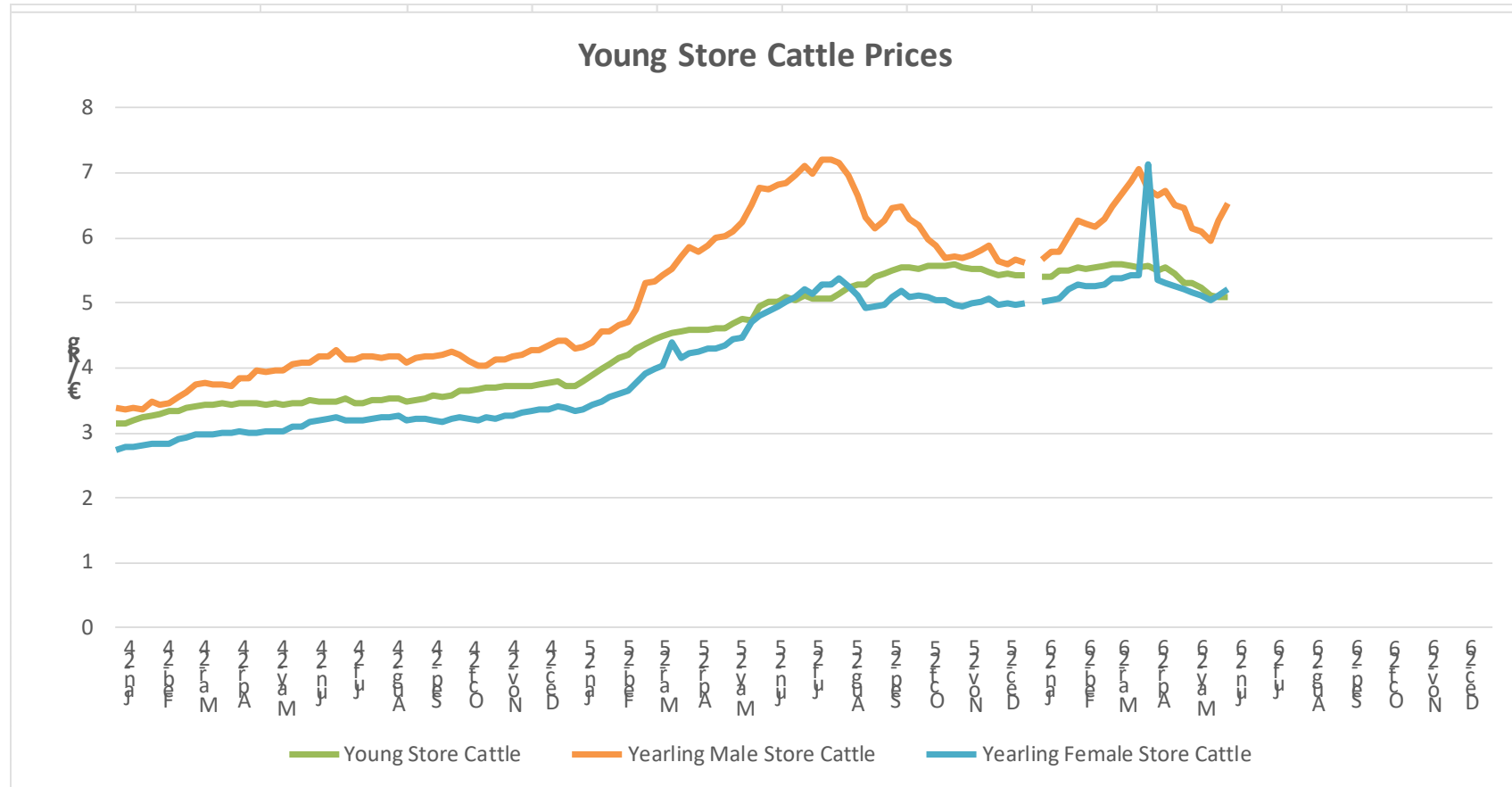
# PRICES CARCASSES

## EU EVOLUTION ALL CAT GLOBAL VIEW



# PRICES LIVE BOVINES

## EU EVOLUTION STORE CATTLE



### Young Store Cattle

Price in week 23 **5.08**

% change y/y : +1.4%

### Yearling Female Store Cattle

Price in week 23 **5.20**

% change y/y : +6.9%

### Yearling Male Store Cattle

Price in week 23 **6.53**

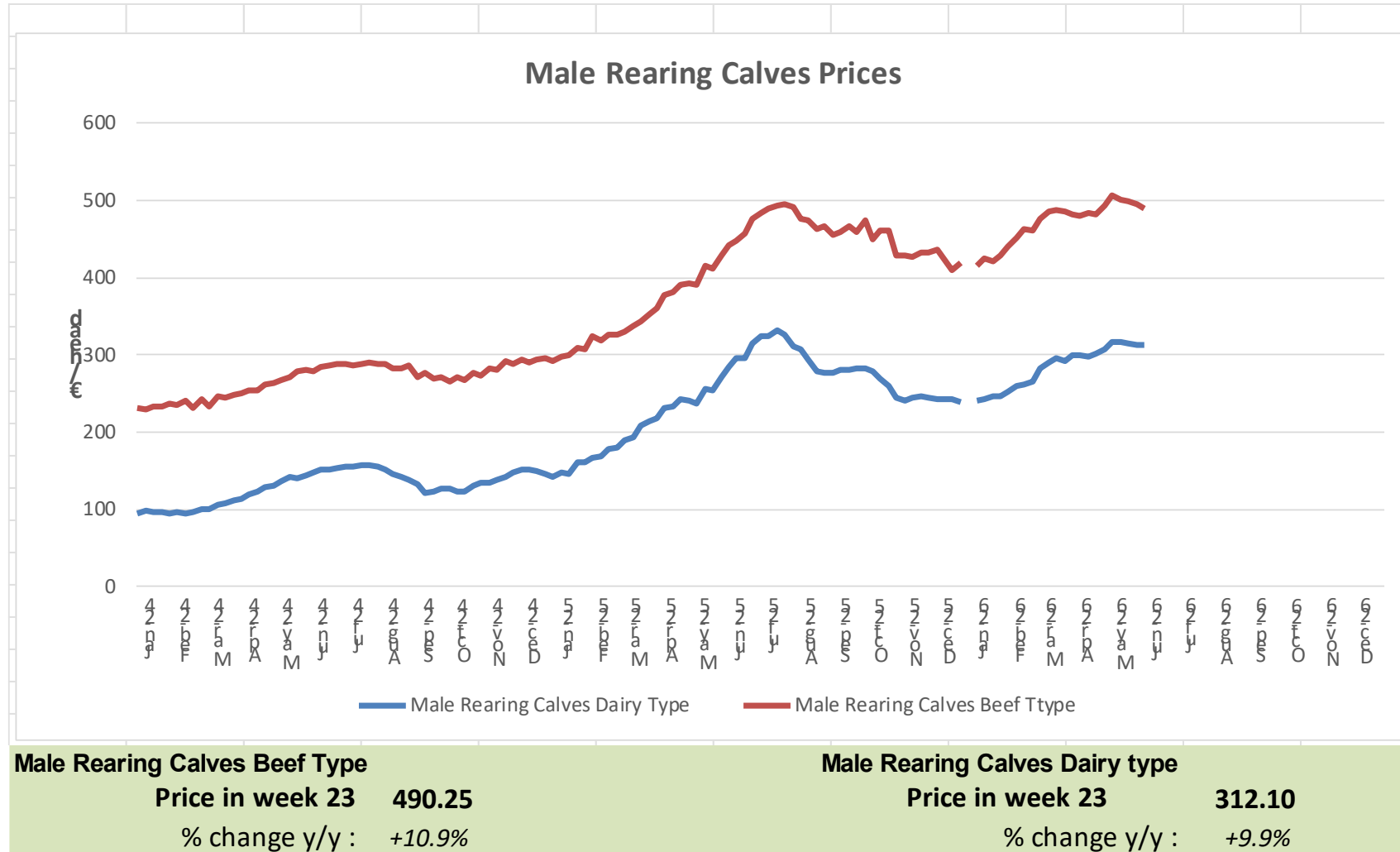
% change y/y : -3.2%

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# PRICES LIVE BOVINES

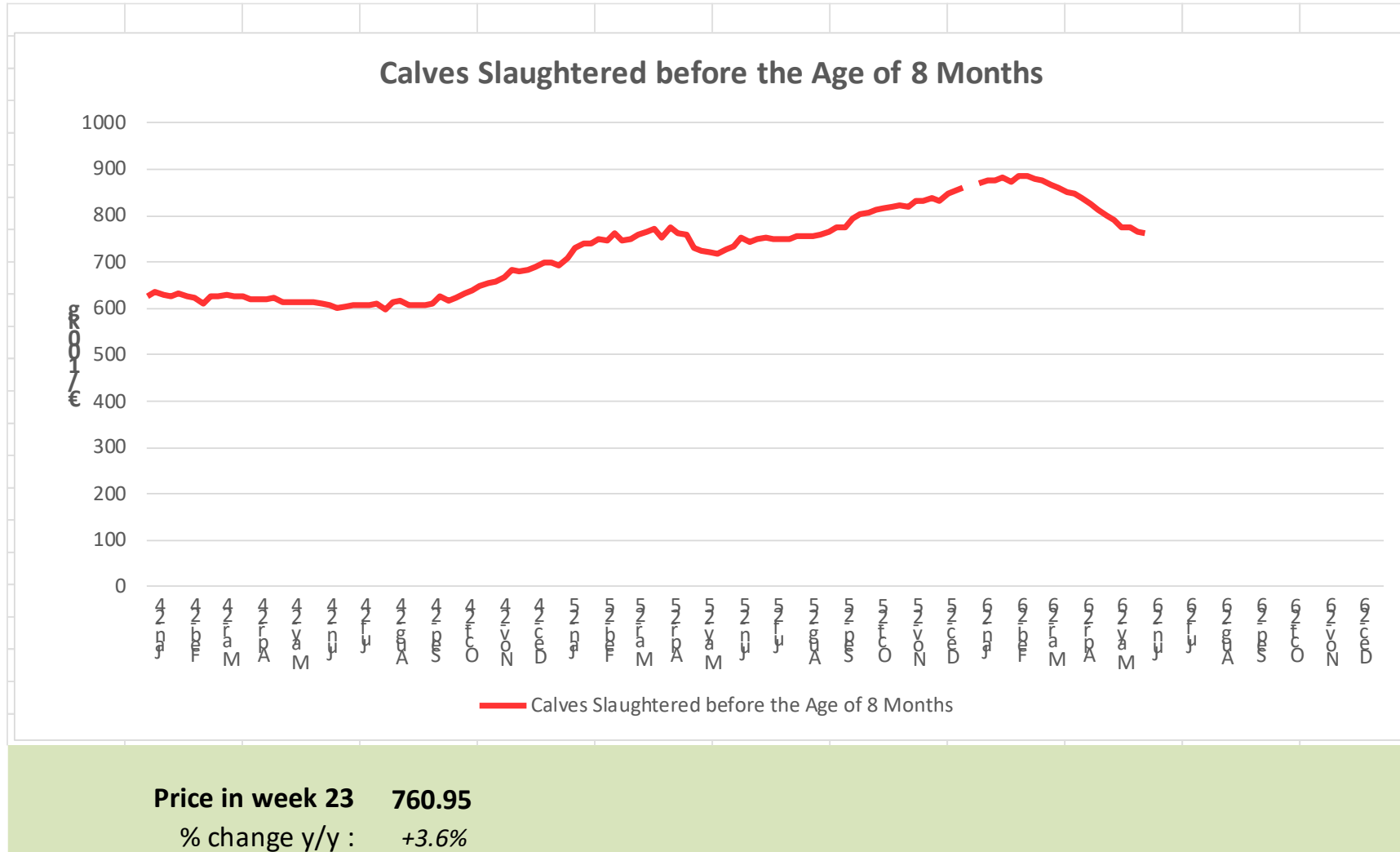
## EU EVOLUTION

### Male Calves – 8D4W

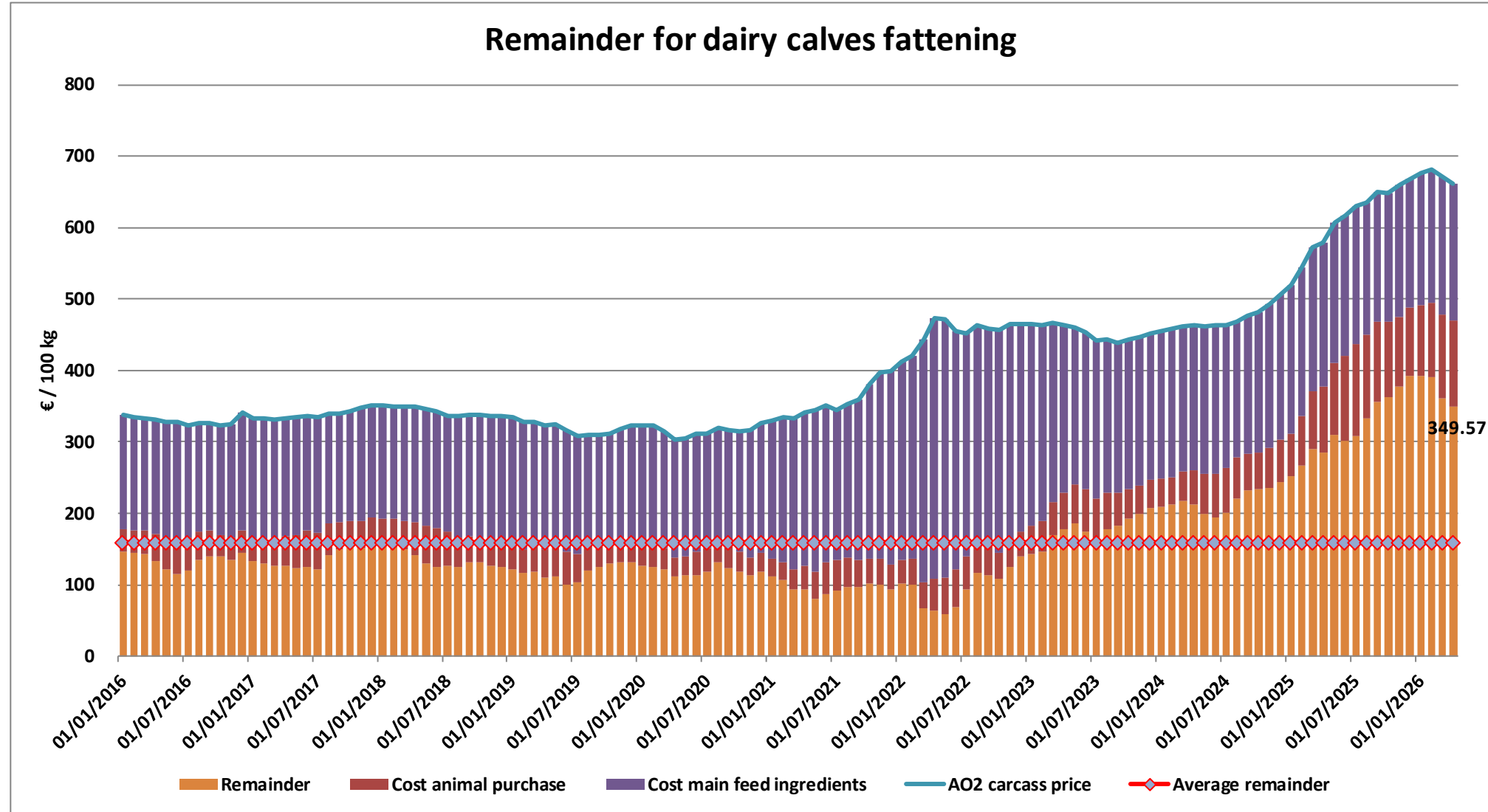


# PRICES LIVE BOVINES

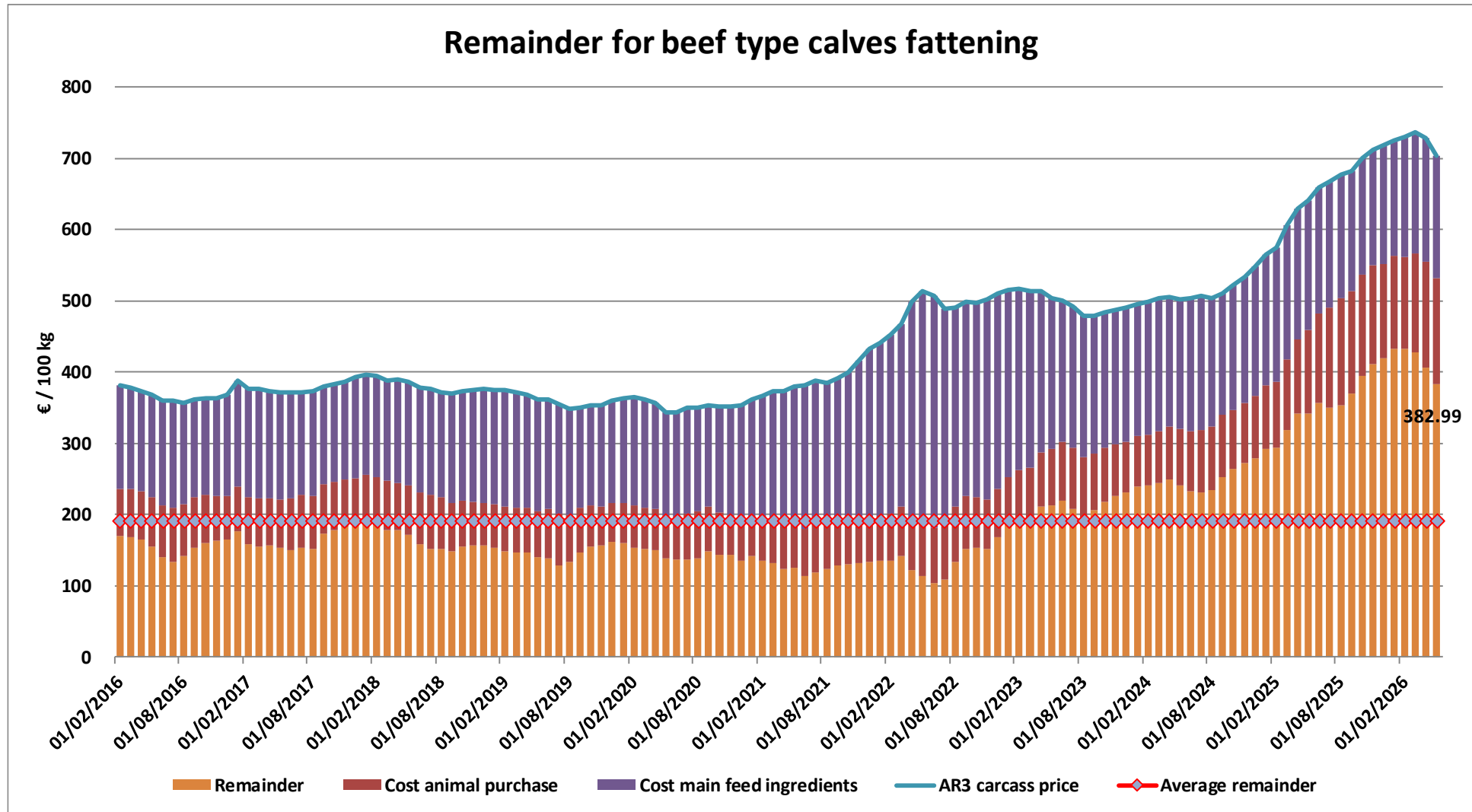
## EU EVOLUTION Butcher Calves



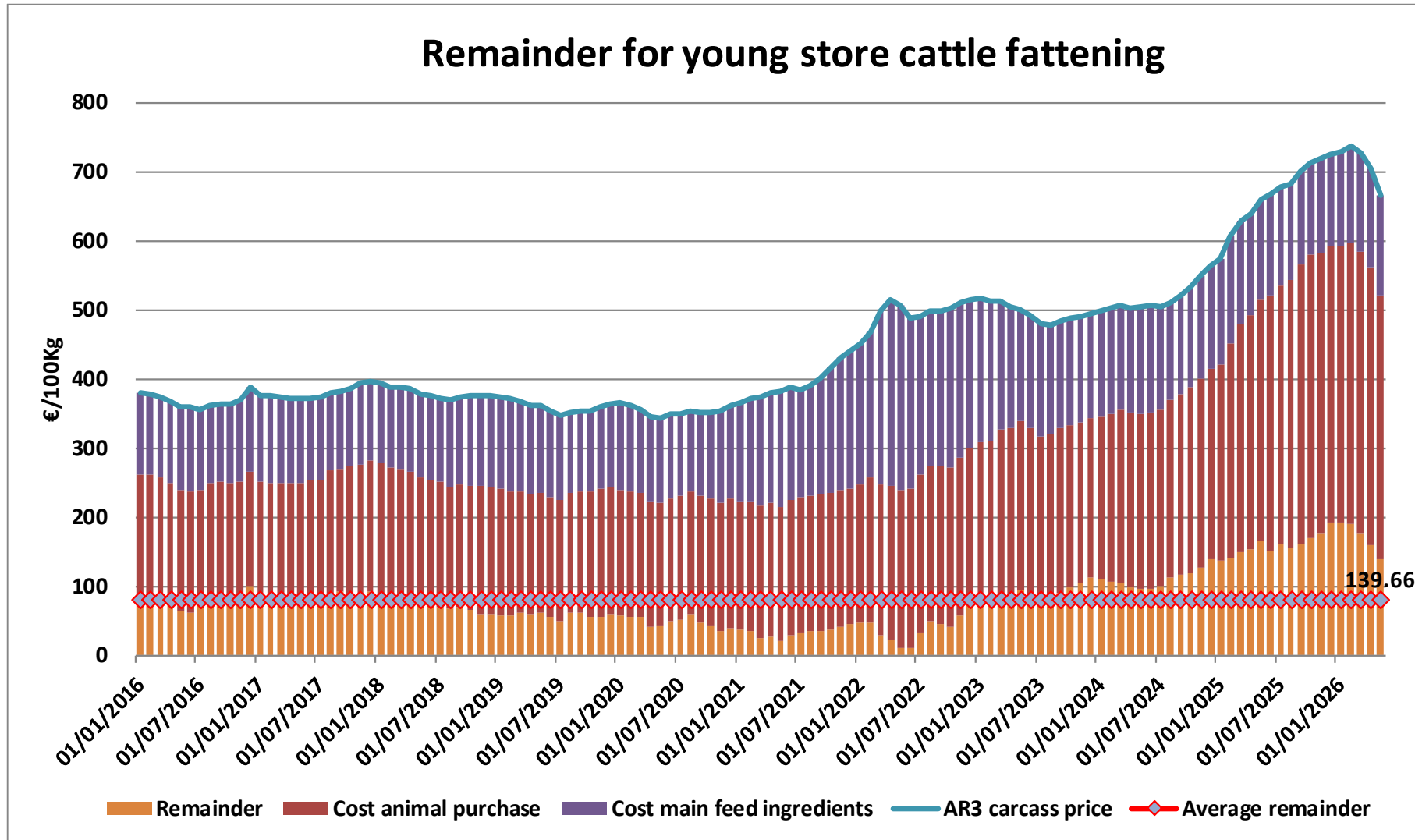
# REMAINDERS



# REMAINDERS



# REMAINDERS



# TRADE

# EU EXPORTS

## Beef & Live Animals

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

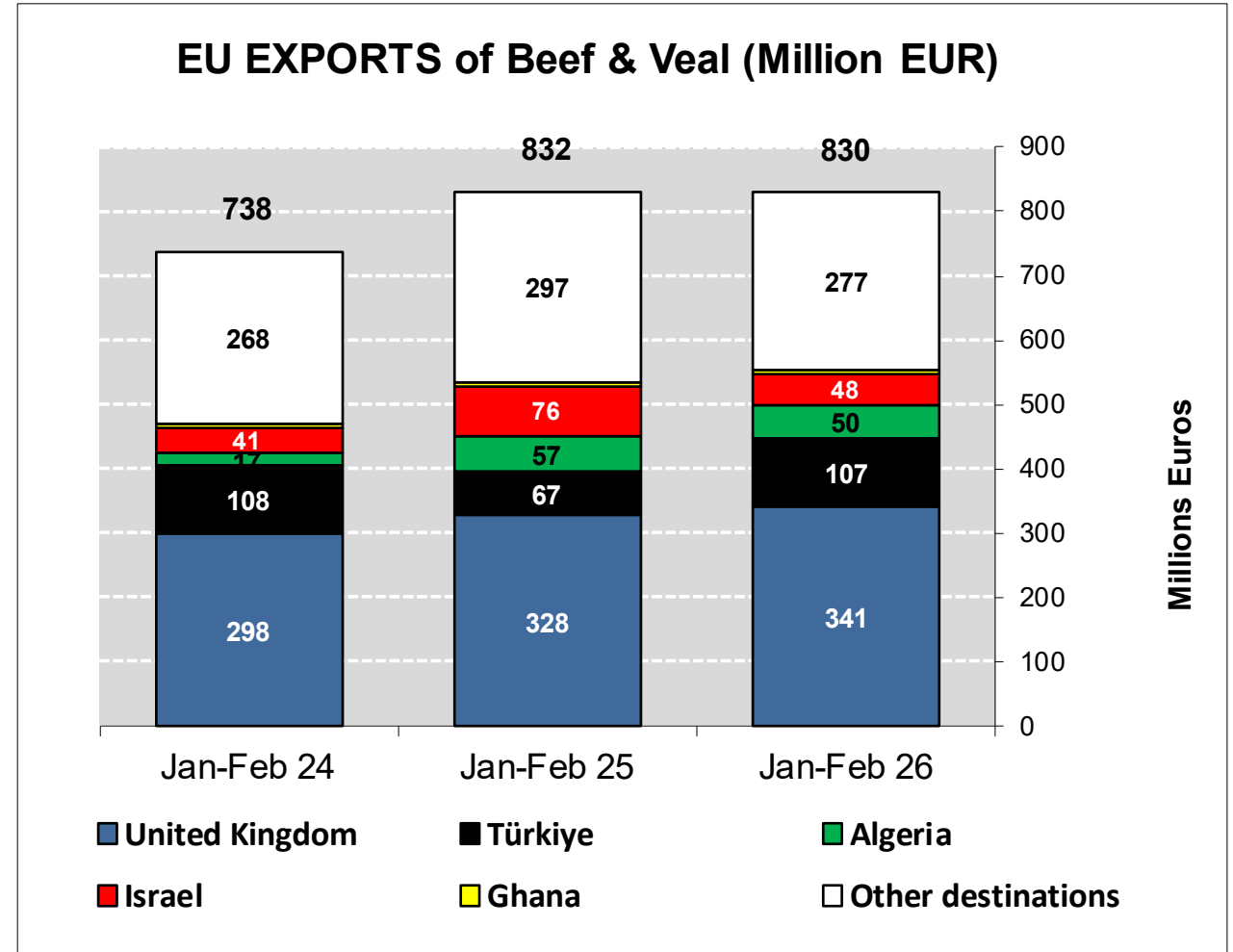
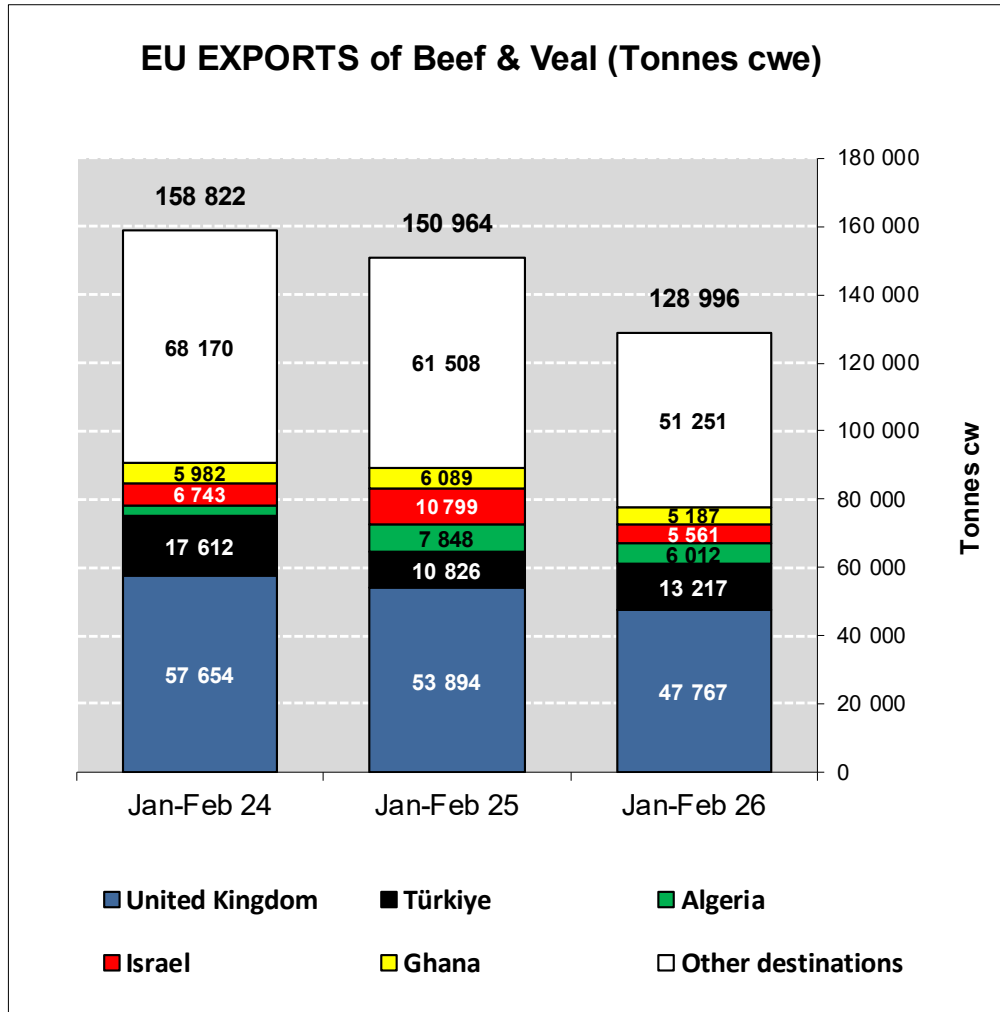
Destinations	2022		2023		2024		2025		Jan-Feb 26		Compared to Jan-Feb 25
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	366 323	38.9%	368 953	38.4%	343 684	34.5%	316 658	38.0%	47 767	37.0%	- 11.4%
Türkiye	14 168	1.5%	90 924	9.5%	109 068	10.9%	59 540	7.1%	13 217	10.2%	+ 22.1%
Algeria	25 459	2.7%	11 905	1.2%	30 687	3.1%	31 482	3.8%	6 012	4.7%	- 23.4%
Israel	63 618	6.7%	45 146	4.7%	50 633	5.1%	38 022	4.6%	5 561	4.3%	- 48.5%
Ghana	32 171	3.4%	33 889	3.5%	35 125	3.5%	40 186	4.8%	5 187	4.0%	- 14.8%
Switzerland	24 959	2.6%	19 376	2.0%	23 563	2.4%	30 435	3.7%	4 597	3.6%	- 7.0%
Ivory Coast	29 882	3.2%	30 208	3.1%	28 129	2.8%	31 939	3.8%	4 504	3.5%	- 12.6%
Norway	12 903	1.4%	5 310	0.6%	4 199	0.4%	9 179	1.1%	3 880	3.0%	+++
Bosnia-Herz.	38 796	4.1%	45 285	4.7%	42 007	4.2%	32 456	3.9%	3 525	2.7%	- 28.4%
Kosovo	17 069	1.8%	22 694	2.4%	26 606	2.7%	20 291	2.4%	3 104	2.4%	- 15.8%
Canada	19 986	2.1%	15 907	1.7%	17 556	1.8%	14 728	1.8%	1 937	1.5%	- 26.0%
Hong Kong	10 570	1.1%	21 689	2.3%	17 330	1.7%	10 918	1.3%	1 606	1.2%	- 15.5%
Ukraine	11 969	1.3%	10 088	1.0%	10 770	1.1%	9 525	1.1%	1 585	1.2%	+ 21.8%
Morocco	8 273	0.9%	25 612	2.7%	35 395	3.5%	24 705	3.0%	1 434	1.1%	- 74.8%
Senegal	5 319	0.6%	5 871	0.6%	5 307	0.5%	5 265	0.6%	1 431	1.1%	- 19.2%
North Macedonia	1 772	0.2%	9 975	1.0%	11 412	1.1%	8 991	1.1%	1 263	1.0%	- 9.4%
<i>Other Destinations</i>	<i>259 354</i>	<i>27.5%</i>	<i>198 432</i>	<i>20.6%</i>	<i>206 121</i>	<i>20.7%</i>	<i>148 510</i>	<i>17.8%</i>	<i>22 385</i>	<i>17.4%</i>	
<b>Total</b>	<b>942 592</b>		<b>961 266</b>		<b>997 593</b>		<b>832 830</b>		<b>128 996</b>		
% change			+ 2%		+ 4%		- 17%		- 14.6%		

# TRADE

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

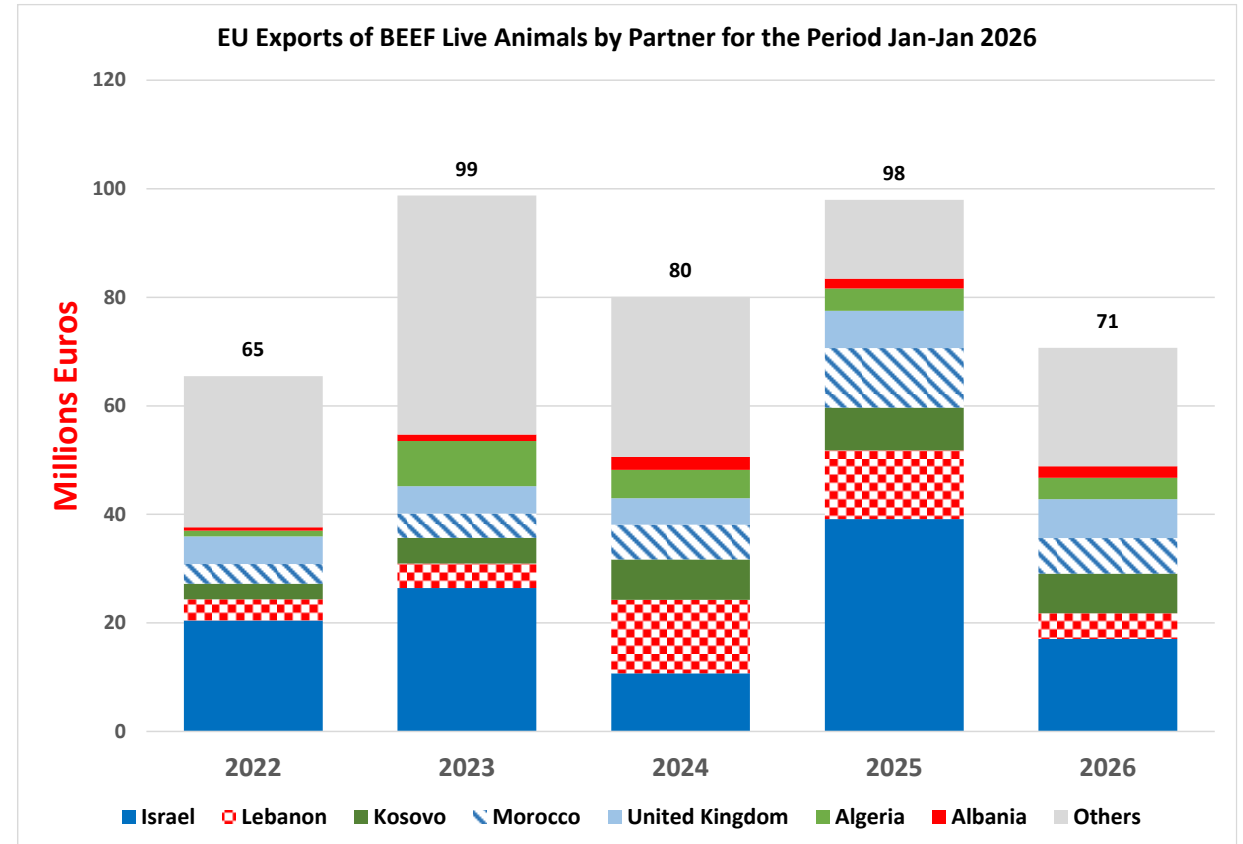
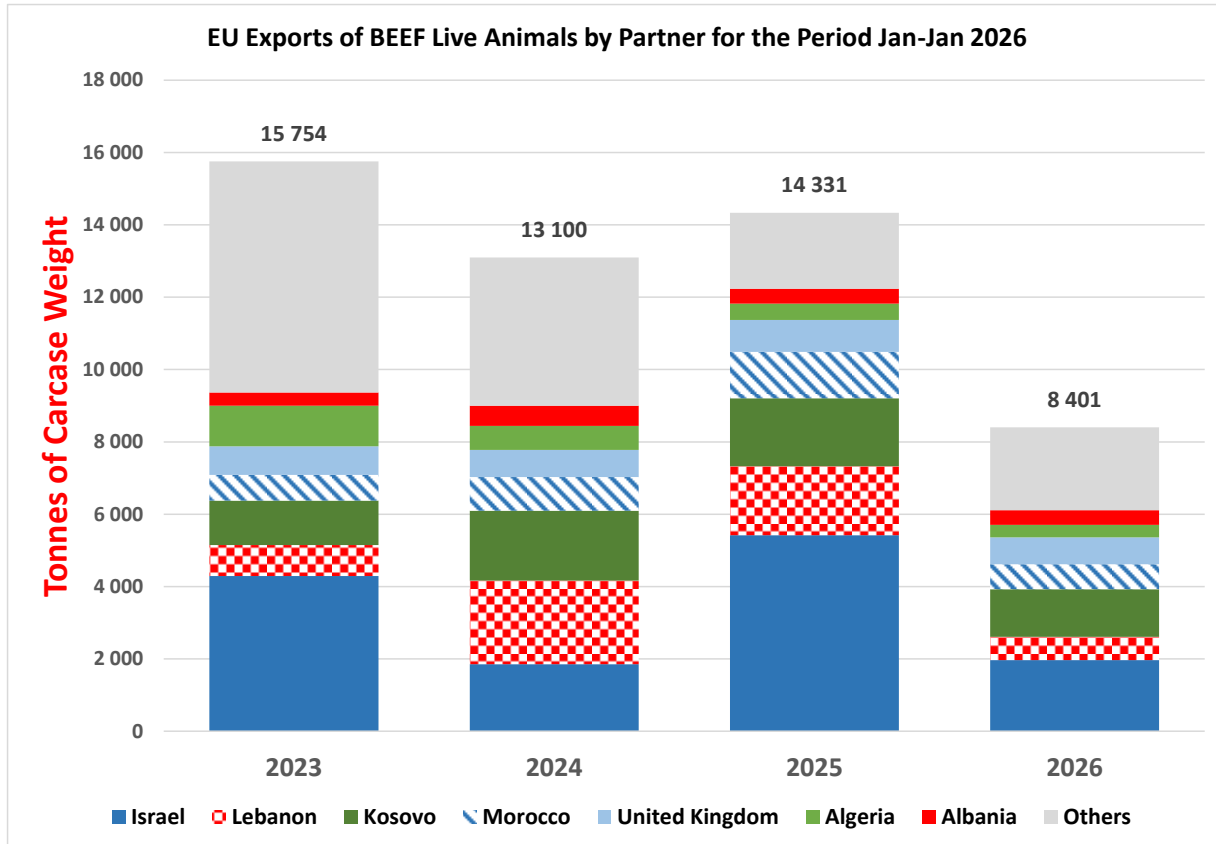
# EU EXPORTS

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)

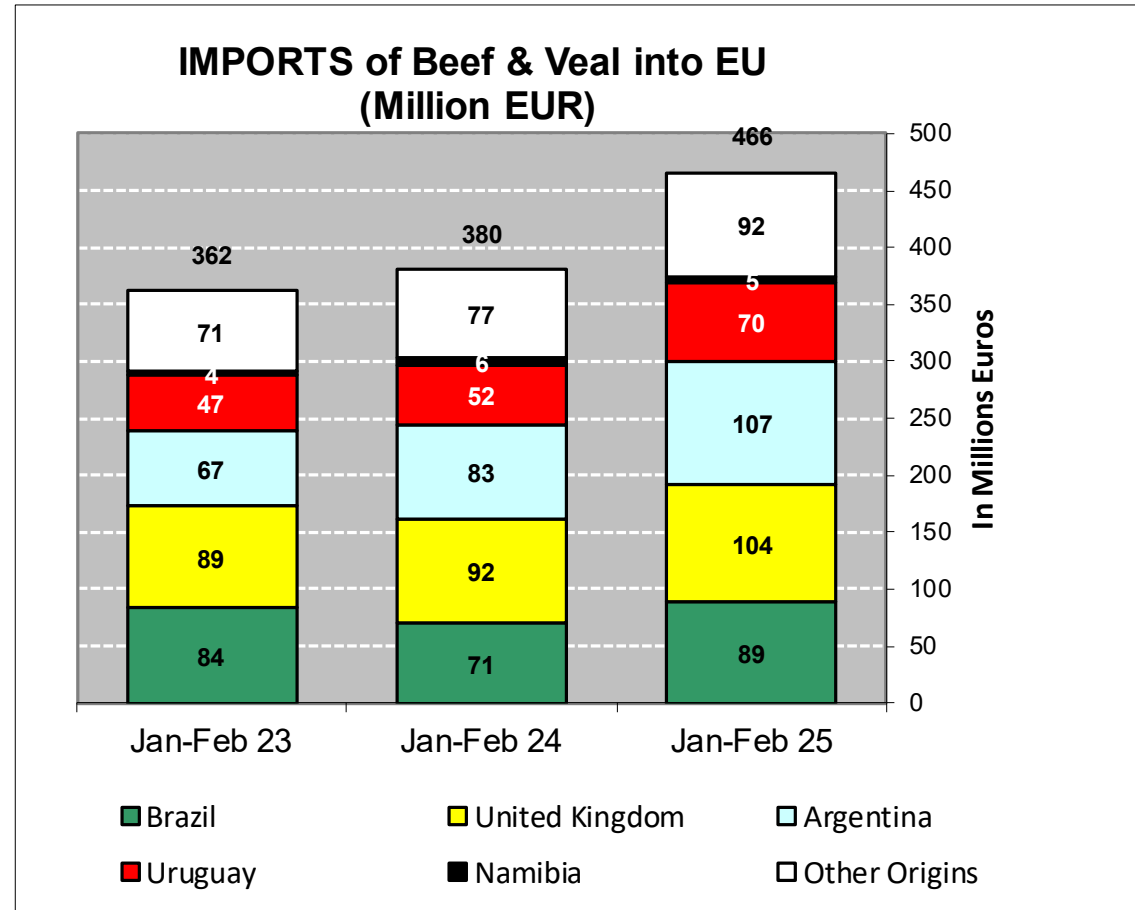
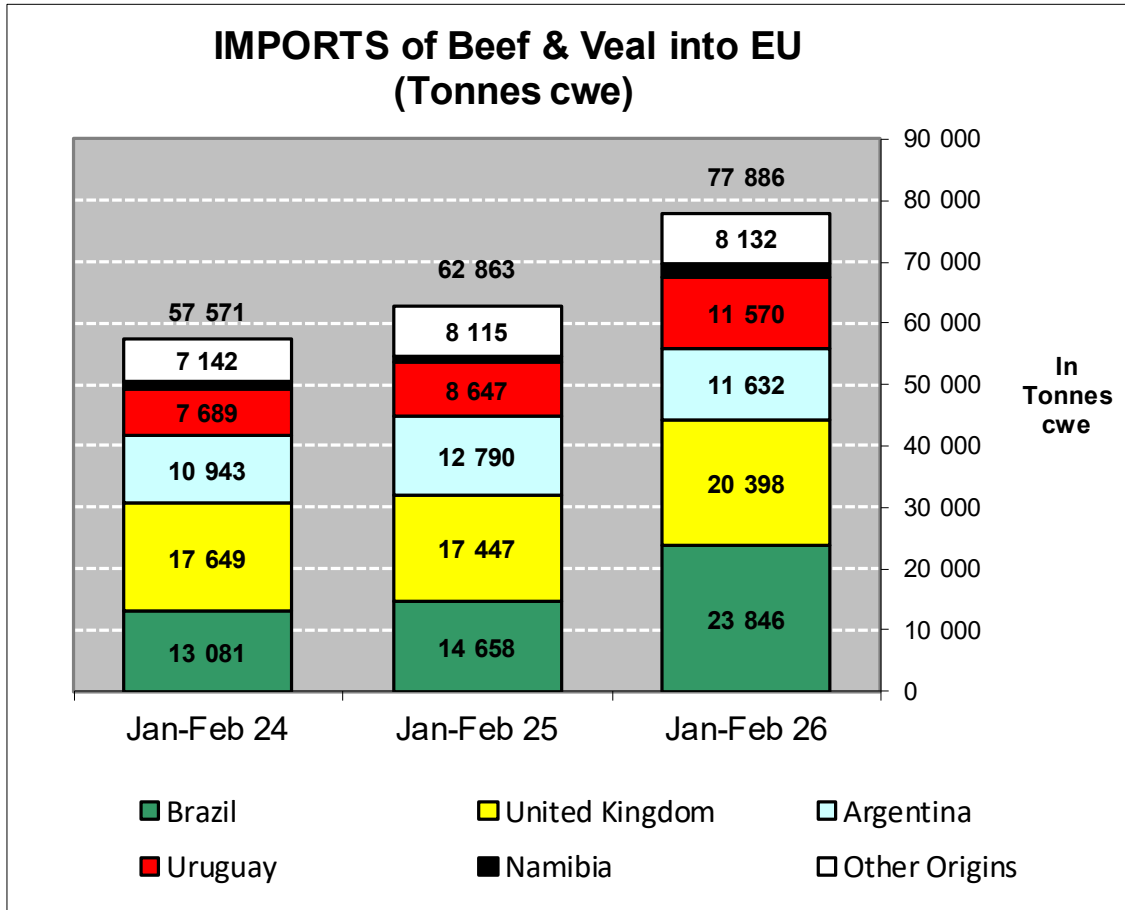
Origins	2022		2023		2024		2025		Jan-Feb 26		Compared to Jan-Feb 25
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	86 512	24.0%	86 934	24.7%	87 603	23.1%	119 605	26.5%	23 846	30.6%	+ 62.7%
United Kingdom	118 759	33.0%	108 186	30.7%	111 326	29.4%	121 859	27.0%	20 398	26.2%	+ 16.9%
Argentina	62 584	17.4%	63 094	17.9%	68 730	18.1%	81 987	18.2%	11 632	14.9%	- 9.1%
Uruguay	37 619	10.5%	41 544	11.8%	44 270	11.7%	60 679	13.4%	11 570	14.9%	+ 33.8%
Namibia	5 168	1.4%	7 903	2.2%	15 547	4.1%	13 069	2.9%	2 309	3.0%	+ 91.5%
USA	17 269	4.8%	18 345	5.2%	16 526	4.4%	16 123	3.6%	2 263	2.9%	- 4.6%
Australia	8 385	2.3%	7 700	2.2%	8 352	2.2%	9 381	2.1%	1 584	2.0%	- 2.3%
Botswana	928	0.3%	1 606	0.5%	7 718	2.0%	5 588	1.2%	1 119	1.4%	+++
New Zealand	5 202	1.4%	4 531	1.3%	5 847	1.5%	7 641	1.7%	1 007	1.3%	+ 6.2%
Switzerland	4 730	1.3%	3 627	1.0%	3 793	1.0%	3 605	0.8%	781	1.0%	- 1.6%
Paraguay	5 404	1.5%	4 774	1.4%	5 303	1.4%	6 207	1.4%	711	0.9%	- 30.7%
Canada	2 172	0.6%	1 456	0.4%	1 102	0.3%	1 565	0.3%	225	0.3%	- 8.4%
Japan	2 160	0.6%	836	0.2%	1 171	0.3%	1 421	0.3%	180	0.2%	- 2.2%
North Macedonia	33	0.0%	29	0.0%	50	0.0%	699	0.2%	99	0.1%	- 1.3%
Serbia	1 058	0.3%	812	0.2%	641	0.2%	753	0.2%	73	0.1%	- 28.3%
Chile	378	0.1%	365	0.1%	346	0.1%	594	0.1%	52	0.1%	- 18.9%
<i>Other Destinations</i>	1 633	0.5%	928	0.3%	971	0.3%	870	0.2%	39	0.1%	
<b>Total</b>	<b>359 994</b>		<b>352 669</b>		<b>379 296</b>		<b>451 645</b>		<b>77 886</b>		
% change			- 2%		+ 8%		+ 19%		+ 23.9%		

18 June 2026

# TRADE

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

# EU IMPORTS

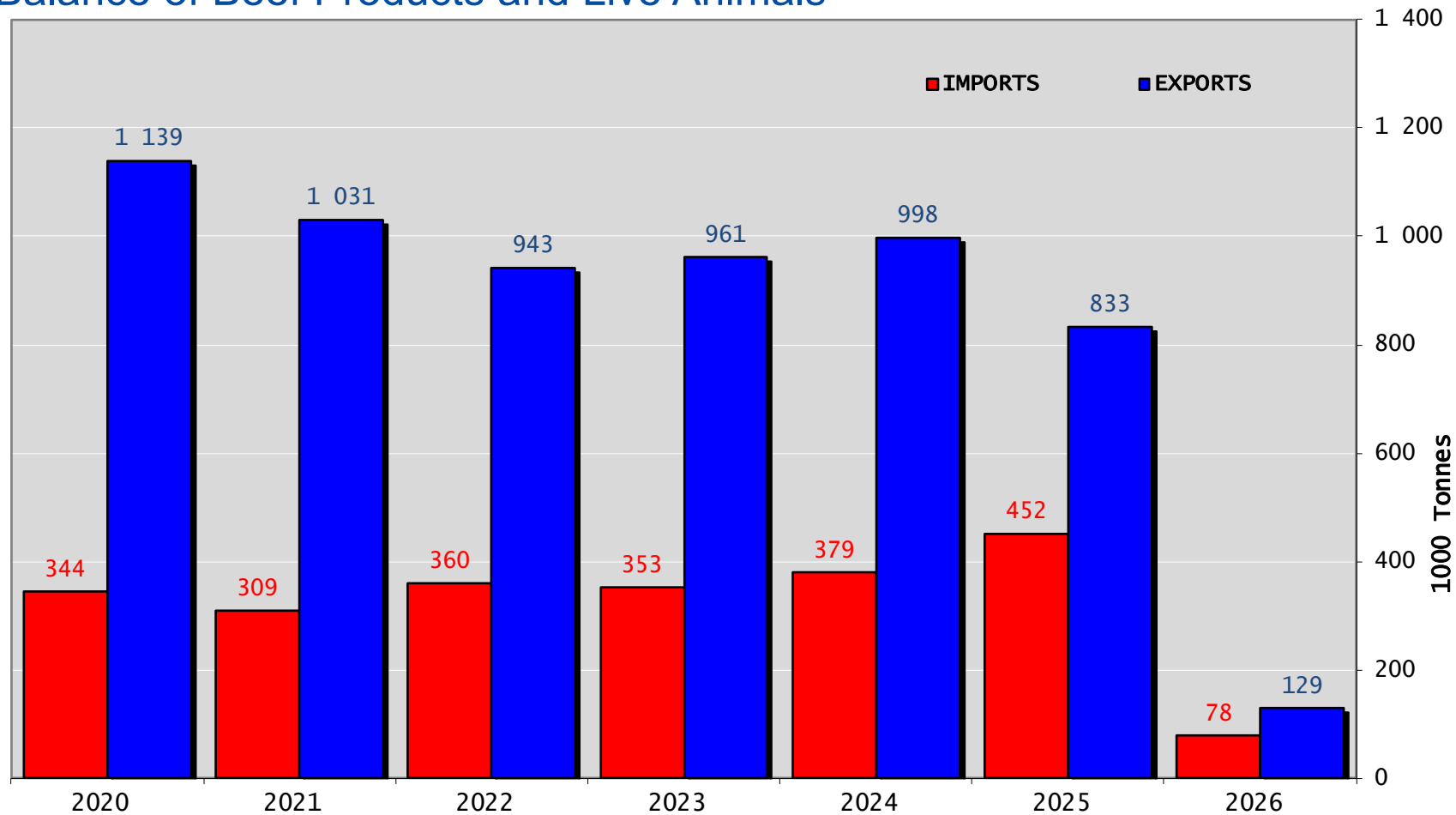


# TRADE

# EUTRADE BALANCE

## Beef & Live Animals

### Trade Balance of Beef Products and Live Animals

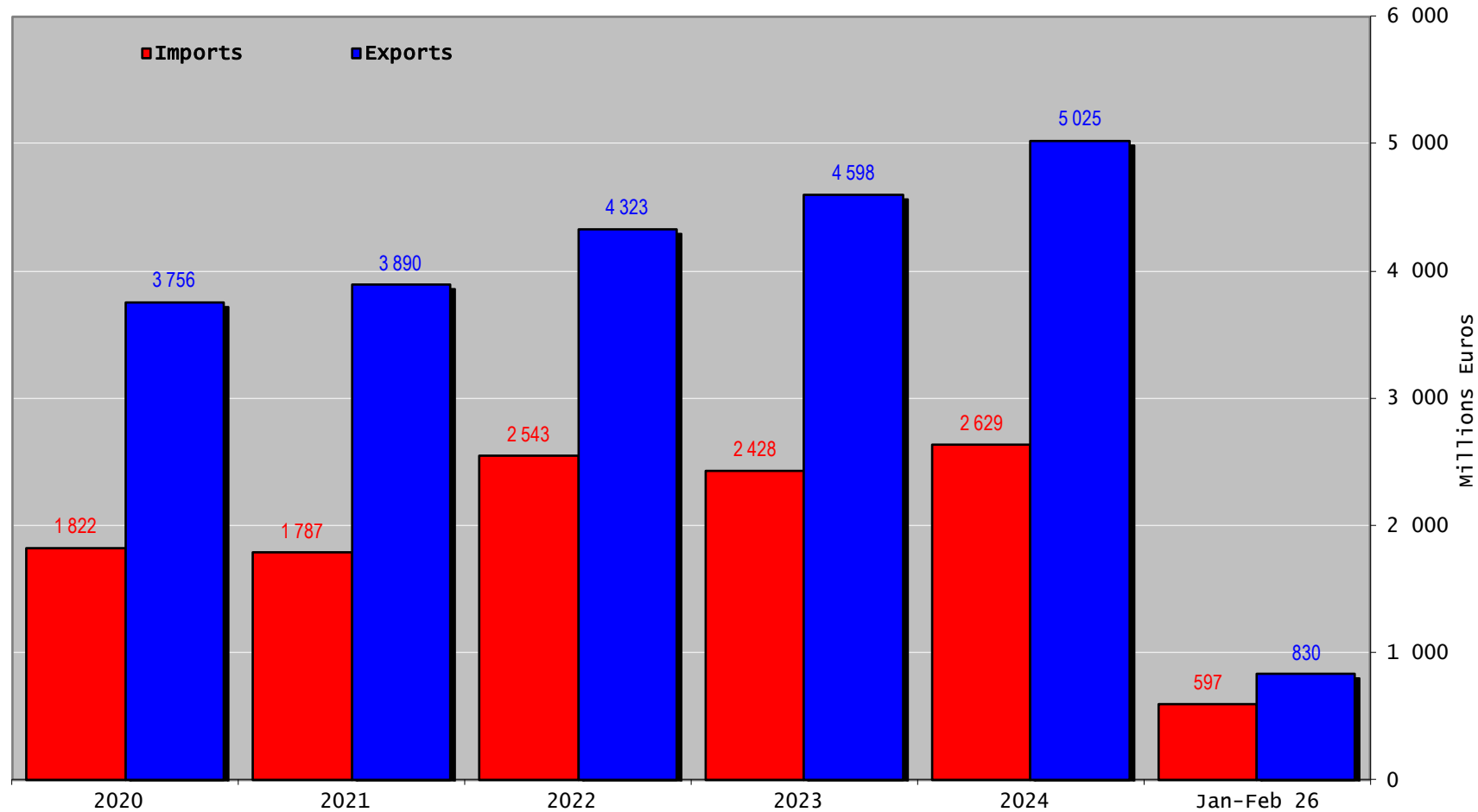


# TRADE

# EU TRADE BALANCE

## Beef & Live Animals

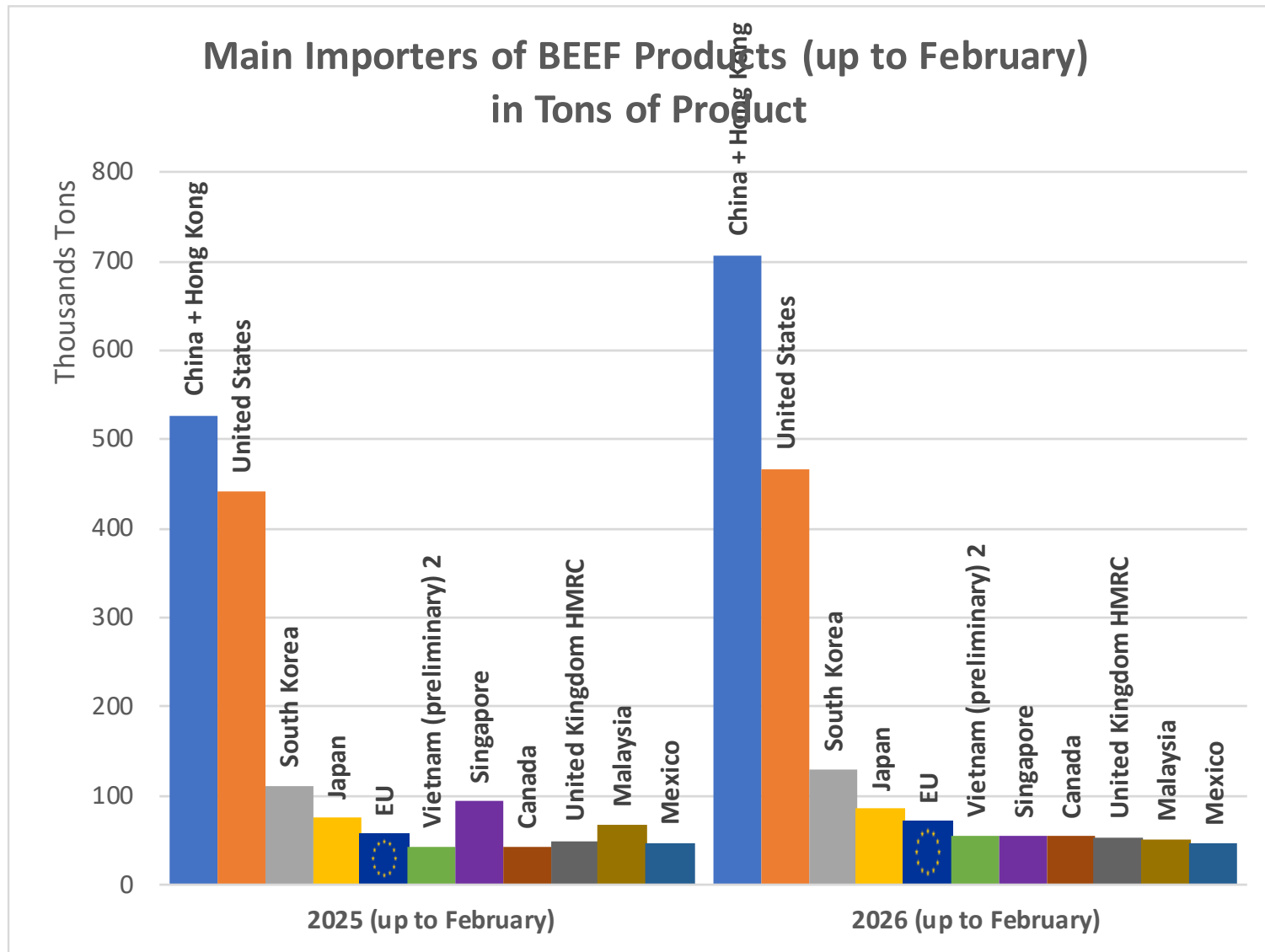
Trade Balance of Beef Products and Live Animals



18 June 2026

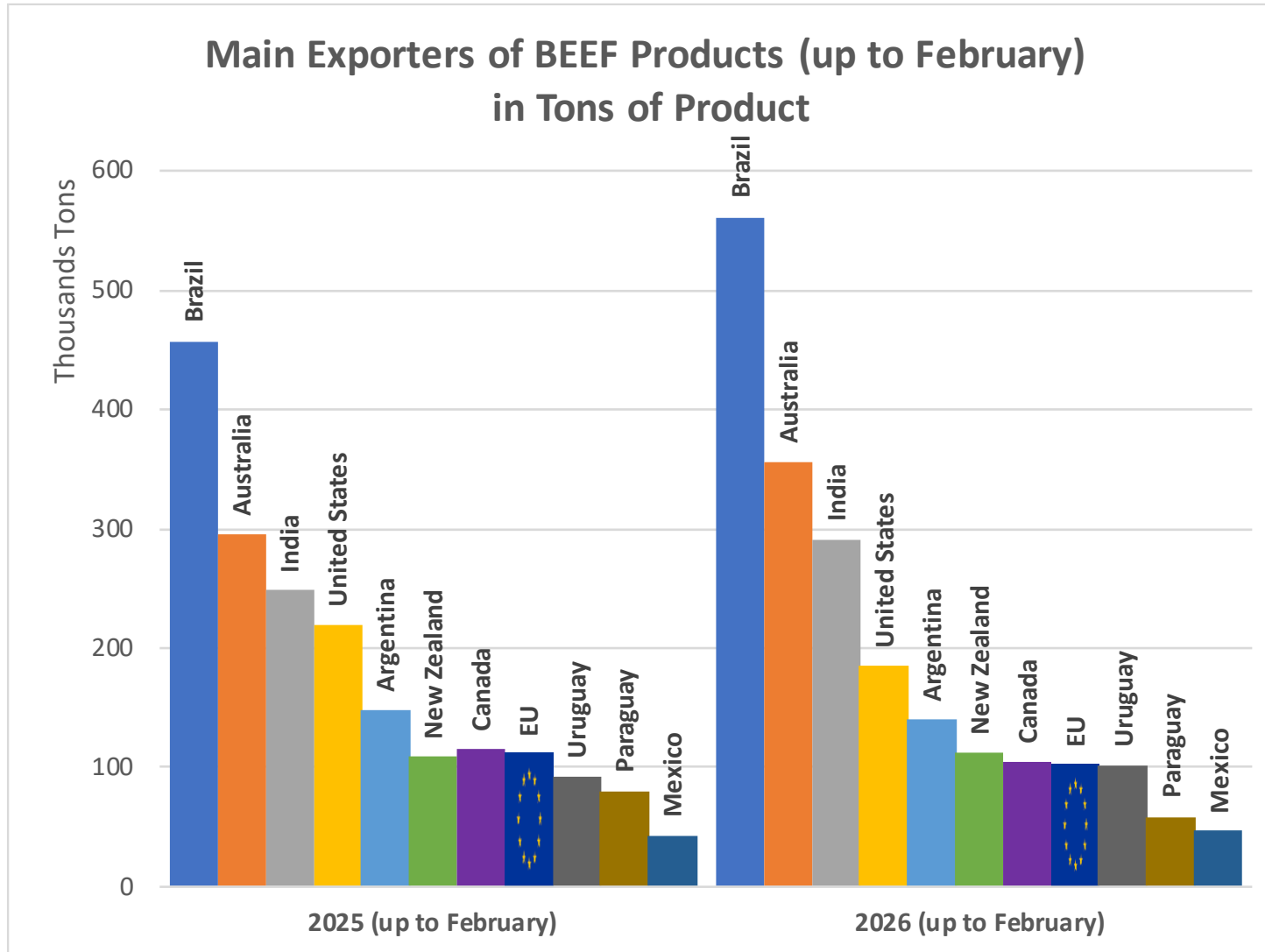
# WORLD BEEF MARKET

## BEEF MAIN IMPORTERS



# WORLD BEEF MARKET

## BEEF MAIN EXPORTERS

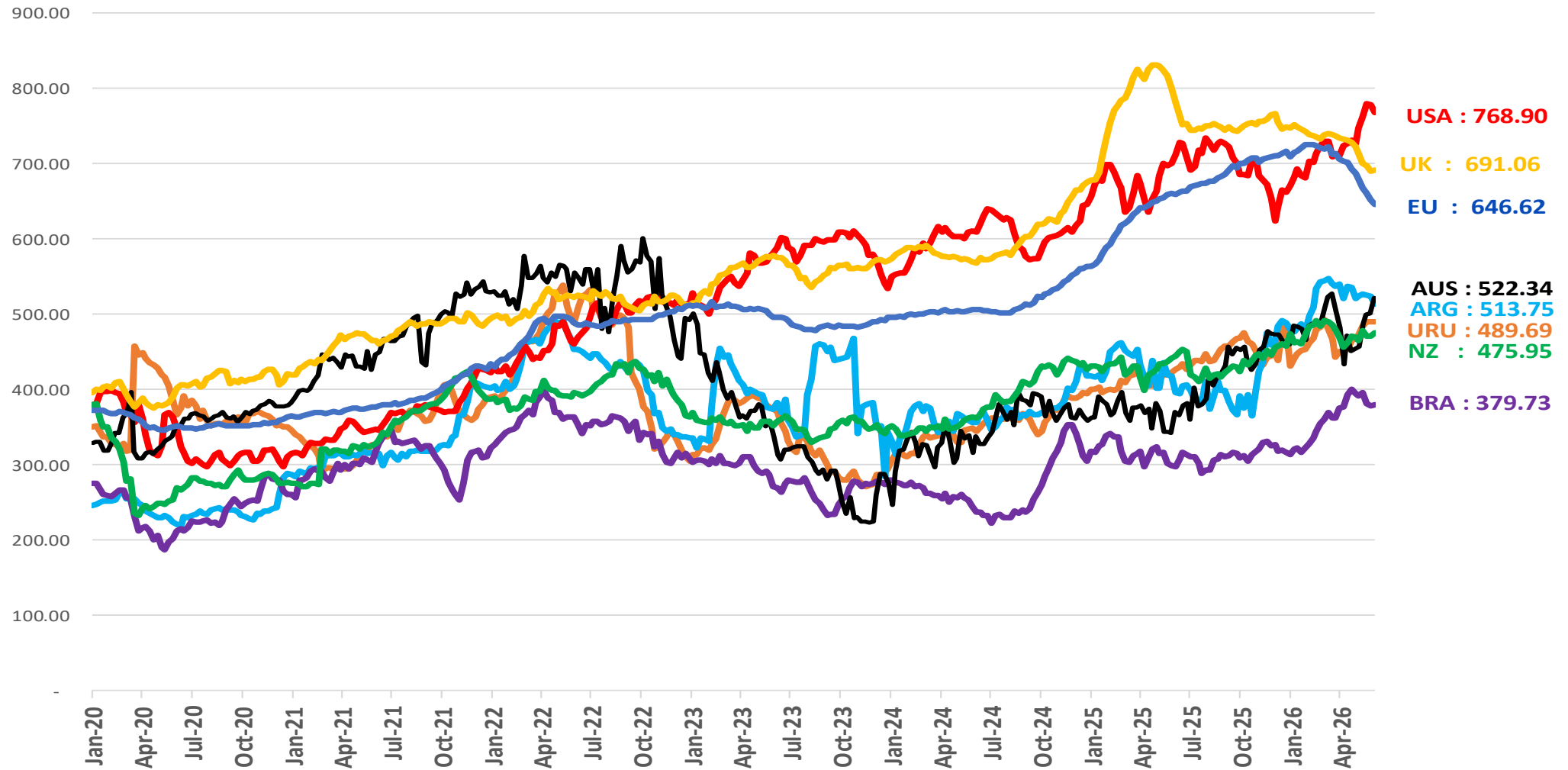


18 June 2026

# WORLD BEEF MARKET

STEER PRICES  
EU, US, AUS, NZ

## World Beef Prices in Euros/100 kg carcase



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/>