

BEEF & VEAL MARKET SITUATION

20 November 2025



LIVESTOCK

JUNE SURVEY

May/Jun 1000 Hd	TOT LIVESTOCK				%Var 2025 2024	BOVINE < 1 Year				%Var 2025 2024
	2022	2023	2024	2025		2022	2023	2024	2025	
BE	2 241	2 281	2 241	2 113	-5.7%	656	677	665	592	-11.0%
BG										
CZ				1 443					448	
DK	1 484	1 454	1 423	1 408	-1.0%	510	498	490	481	-1.7%
DE	10 986	10 937	10 627	10 335	-2.7%	3 296	3 260	3 153	3 015	-4.4%
EE										
IE	7 396	7 341	7 183	6 905	-3.9%	2 134	2 074	2 026	1 962	-3.2%
EL				583					138	
ES	6 754	6 565	6 379	6 443	+1.0%	2 569	2 427	2 321	2 376	+2.4%
FR	17 416	17 039	16 794	16 395	-2.4%	4 949	4 838	4 736	4 512	-4.7%
HR										
IT	6 087	5 975	5 892	5 788	-1.8%	1 725	1 663	1 645	1 580	-4.0%
CY										
LV										
LT				617					171	
LU										
HU				889					260	
MT										
NL	3 766	3 752	3 693	3 549	-3.9%	1 546	1 507	1 485	1 393	-6.2%
AT	1 842	1 826	1 804	1 790	-0.8%	592	574	566	563	-0.6%
PL	6 444	6 360	6 336	6 147	-3.0%	1 916	1 855	1 882	1 838	-2.3%
PT	1 680	1 608	1 534	1 518	-1.0%	554	511	487	492	+1.0%
RO	1 852	1 833	1 835	1 848	+0.7%	379	370	358	352	-1.8%
SI										
SK										
FI				764					261	
SE	1 449	1 444	1 410	1 400	-0.8%	458	458	444	436	-1.8%
EU	69 398	68 415	67 150	69 936	-2.2%	21 285	20 713	20 257	20 870	-3.3%

Source : EStat Newcronos

EU EVOLUTION

TOTAL BOVINE

May/Jun 1000 Hd	BOVINE 1-2 Year				%Var 2025 2024	BOVINE > 2 Year				%Var 2025 2024
	2022	2023	2024	2025		2022	2023	2024	2025	
BE	463	456	447	426	-4.7%	1 121	1 148	1 129	1 095	-3.1%
BG										
CZ				321					674	
DK	290	281	273	271	-0.5%	684	674	661	656	-0.8%
DE	2 620	2 595	2 496	2 426	-2.8%	5 071	5 082	4 978	4 894	-1.7%
EE										
IE	1 949	1 922	1 859	1 798	-3.3%	3 313	3 346	3 298	3 145	-4.6%
EL				131					314	
ES	902	928	910	963	+5.8%	3 283	3 211	3 148	3 104	-1.4%
FR	3 144	3 077	3 041	3 007	-1.1%	9 323	9 125	9 017	8 876	-1.6%
HR										
IT	1 475	1 439	1 376	1 354	-1.6%	2 887	2 873	2 871	2 854	-0.6%
CY										
LV										
LT				124					322	
LU										
HU				165					464	
MT										
NL	493	507	502	470	-6.4%	1 726	1 738	1 707	1 686	-1.2%
AT	422	426	415	415	-0.2%	828	826	823	813	-1.2%
PL	1 674	1 670	1 641	1 596	-2.7%	2 855	2 834	2 813	2 713	-3.6%
PT	229	229	221	227	+2.5%	897	868	825	800	-3.1%
RO	220	224	221	207	-6.7%	1 254	1 239	1 256	1 290	+2.7%
SI										
SK										
FI				189					315	
SE	374	371	368	363	-1.3%	617	615	599	601	+0.3%
EU	14 255	14 124	13 769	14 452	-1.8%	33 858	33 578	33 125	34 614	-1.8%

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

LIVESTOCK

JUNE SURVEY

May/Jun 1000 Hd	TOTAL COWS				%Var 2025 2024
	2022	2023	2024	2025	
BE	902	918	901	857	-4.9%
BG					
CZ				576	
DK	634	625	614	609	-0.8%
DE	4 430	4 399	4 297	4 200	-2.3%
EE					
IE	2 541	2 519	2 449	2 366	-3.4%
EL				237	
ES	2 951	2 897	2 831	2 806	-0.9%
FR	7 159	6 960	6 845	6 689	-2.3%
HR					
IT	2 130	2 123	2 267	2 257	-0.4%
CY					
LV					
LT				274	
LU					
HU				409	
MT					
NL	1 623	1 629	1 595	1 575	-1.3%
AT	710	704	695	686	-1.4%
PL	2 208	2 338	2 336	2 159	-7.6%
PT	742	718	693	680	-1.8%
RO	1 135	1 111	1 122	1 155	+3.0%
SI					
SK					
FI				288	
SE	510	506	490	489	-0.1%
EU	27 674	27 446	27 134	28 311	-2.2%

EU EVOLUTION

TOTAL BOVINE

May/Jun 1000 Hd	DAIRY COWS				%Var 2025 2024	May/Jun 1000 Hd	OTHER COWS				%Var 2025 2024
	2022	2023	2024	2025			2022	2023	2024	2025	
BE	527	541	535	516	-3.6%		375	377	367	342	-6.8%
BG											
CZ				343						234	
DK	557	553	547	547	+0.0%		77	72	67	63	-7.2%
DE	3 817	3 775	3 668	3 578	-2.5%		612	623	628	621	-1.2%
EE											
IE	1 627	1 647	1 624	1 588	-2.2%		913	872	825	779	-5.7%
EL				79						158	
ES	816	794	783	769	-1.8%		2 135	2 102	2 048	2 037	-0.5%
FR	3 266	3 167	3 103	3 018	-2.7%		3 893	3 793	3 742	3 671	-1.9%
HR											
IT	1 821	1 798	1 695	1 736	+2.4%		309	325	572	521	-8.9%
CY											
LV											
LT				205						69	
LU											
HU				267						142	
MT											
NL	1 571	1 577	1 544	1 528	-1.0%		53	52	51	47	-7.8%
AT	549	546	539	534	-1.1%		161	158	156	152	-2.3%
PL	2 072	2 192	2 190	2 010	-8.2%		136	145	146	149	+2.1%
PT	227	224	219	215	-1.9%		515	494	474	466	-1.8%
RO	1 119	1 091	1 093	1 112	+1.7%		16	20	29	43	+52.3%
SI											
SK											
FI				227						61	
SE	297	295	289	293	+1.2%		213	211	200	196	-2.1%
EU	18 266	18 201	17 830	18 564	-2.2%		9 409	9 245	9 305	9 748	-2.4%

Source : EStat Newcronos

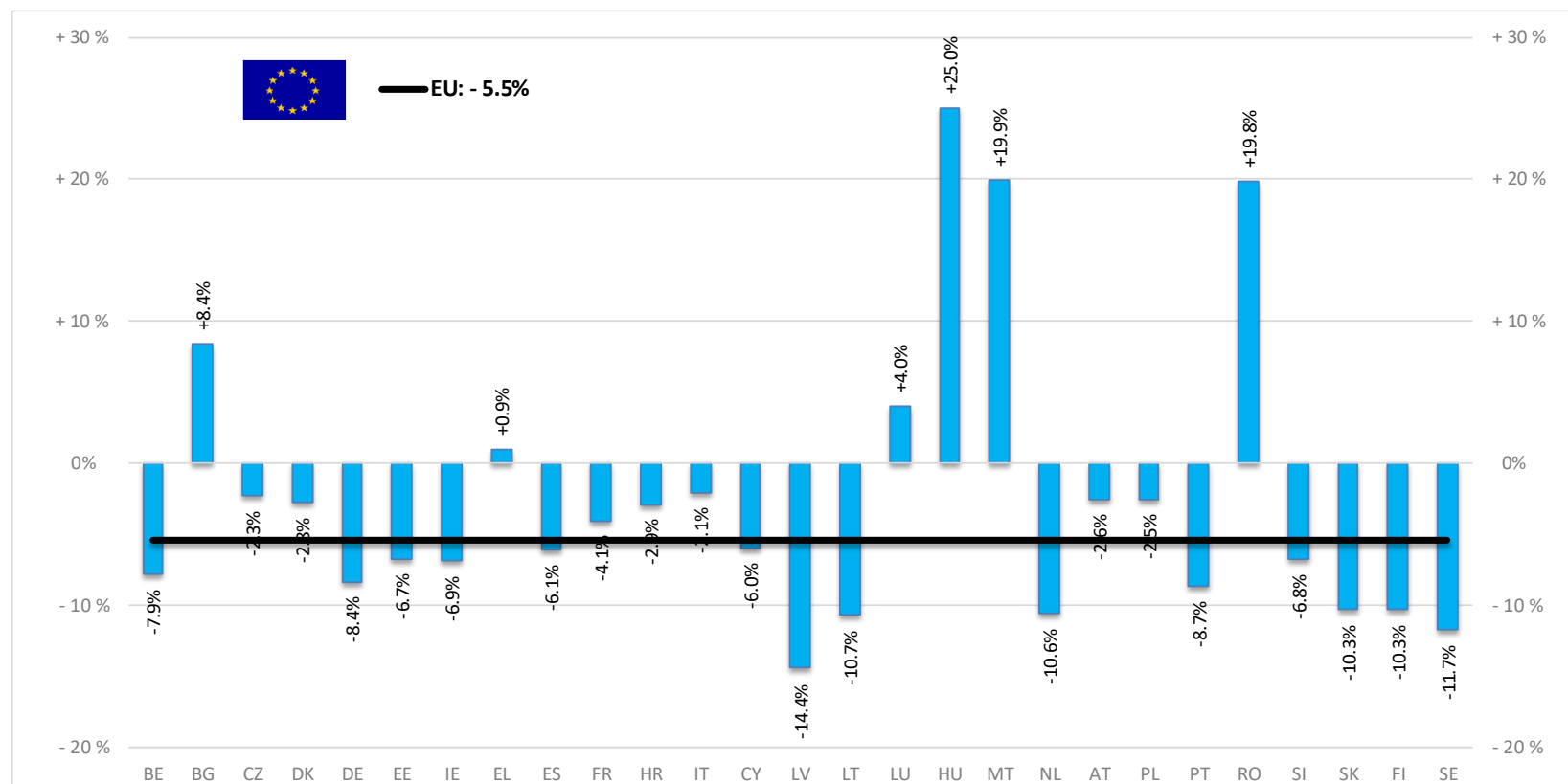
EU %Var is calculated considering only countries available in 2024 AND 2025

PRODUCTION

% EVOLUTION HEADS

HEADS	Jan-Aug 25/24
	EU
Bull	-3.2%
Bullock	-1.4%
Cow	-6.5%
Heifer	-1.9%
Calf	-9.9%
Young cattle	-11.1%
Bovine meat	-5.5%

Estimates for last month of period :



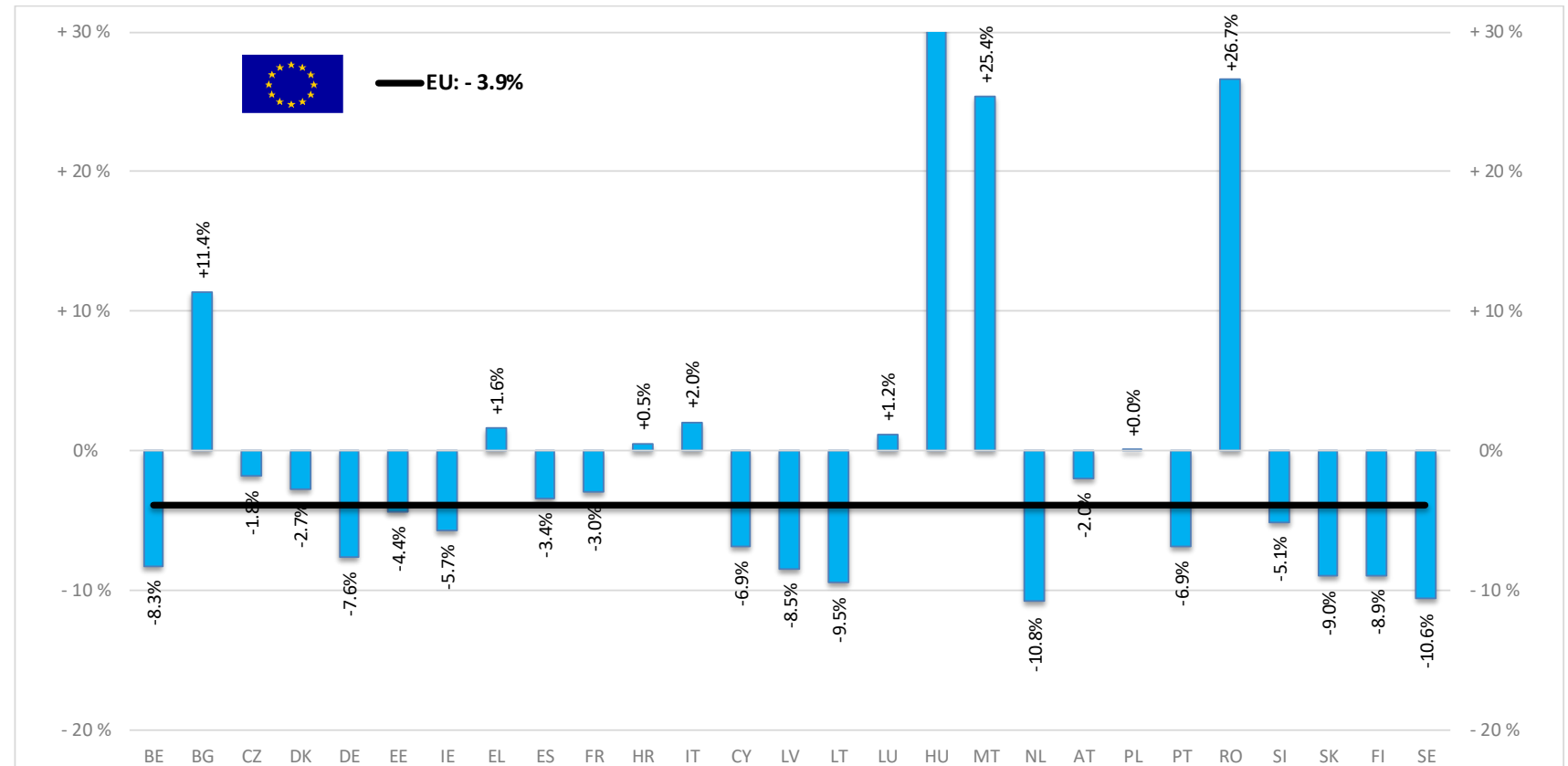
Source : Eurostat - Slaughtering in slaughterhouses - monthly data (apro_mt_pwgtn)

PRODUCTION

% EVOLUTION TONNES

TONS	Jan-Aug 25/24
	EU
Bull	-2.9%
Bullock	-1.2%
Cow	-5.2%
Heifer	+0.5%
Calf	-9.3%
Young cattle	-12.2%
Bovine meat	-3.9%

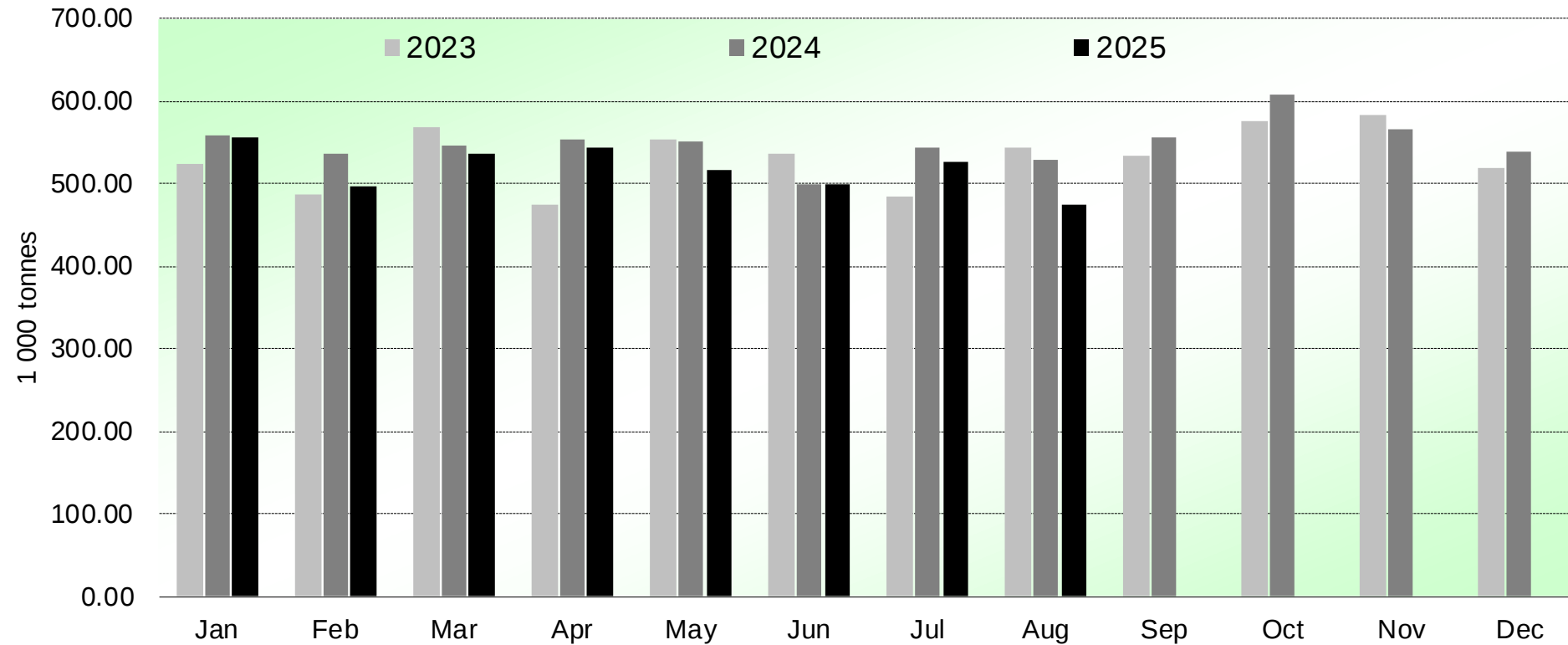
Estimates for last month of period :



PRODUCTION

HISTORIC
TONNES

Beef & Veal Production (EU Slaughtering) - Tonnes



PRICES CARCASSES

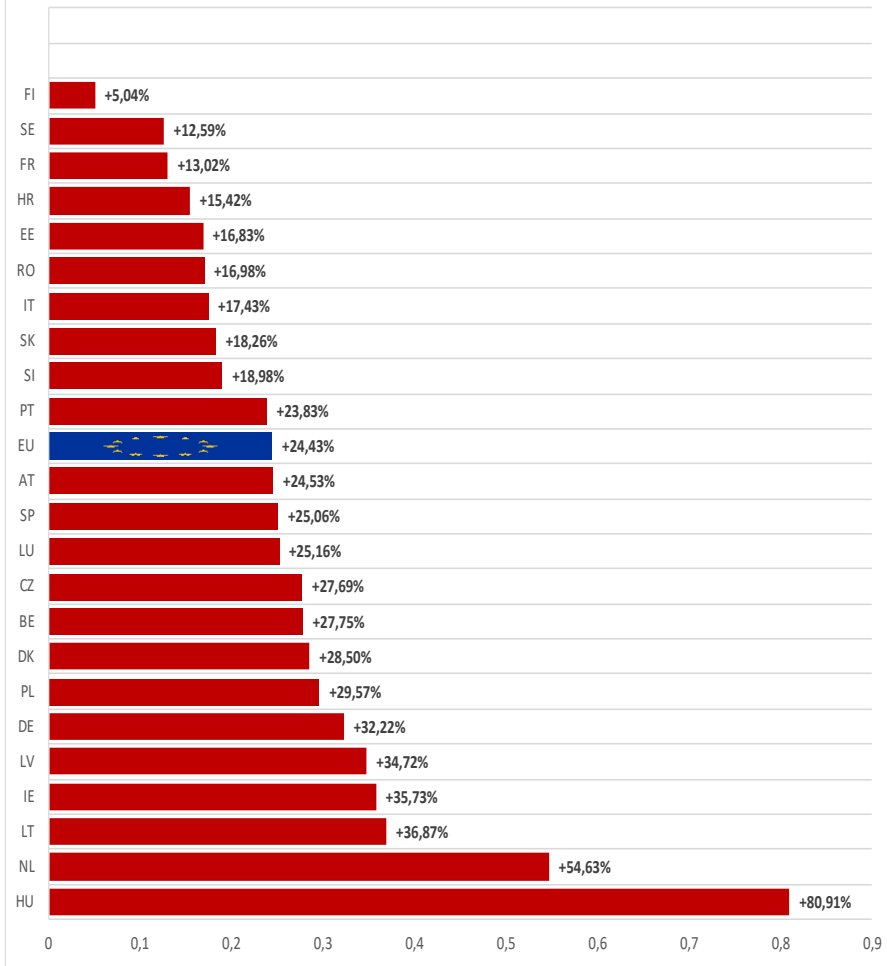
Dashboard

EU Prices week		45	Evolution since last week		Evolution since last month	Evolution since last year
Carcasse	Average A/C/Z -R3	688.7	€/100 kg	- 0.2%	+ 0.9%	+ 29.6%
	Young Bovines (Z)	624.7		- 0.3%	+ 0.8%	+ 22.6%
	Young Bulls (A)	692.4		- 0.3%	+ 0.4%	+ 28.6%
	Steers (C)	767.2		+ 0.3%	+ 3.8%	+ 45.4%
	Cows (D)	606.9		- 1.2%	- 4.0%	+ 38.7%
	Heifers (E)	723.9		- 0.2%	+ 0.1%	+ 33.5%
	Calves slaughtered <8M	820.1		- 0.3%	+ 0.9%	+ 24.4%
Live Animals	Male Calves Dairy Type	240.7	€/head	- 1.3%	- 13.4%	+ 77.6%
	Male Calves Beef Type	430.0		+ 0.4%	- 4.3%	+ 52.3%
	Young Store Cattle	5.55	€/kg	- 0.7%	- 0.4%	+ 49.3%
	Yearling Male Store Cattle	5.68		- 0.7%	- 5.1%	+ 37.3%
	Yearling Female Store Cattle	4.95		- 0.5%	- 2.8%	+ 52.0%

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

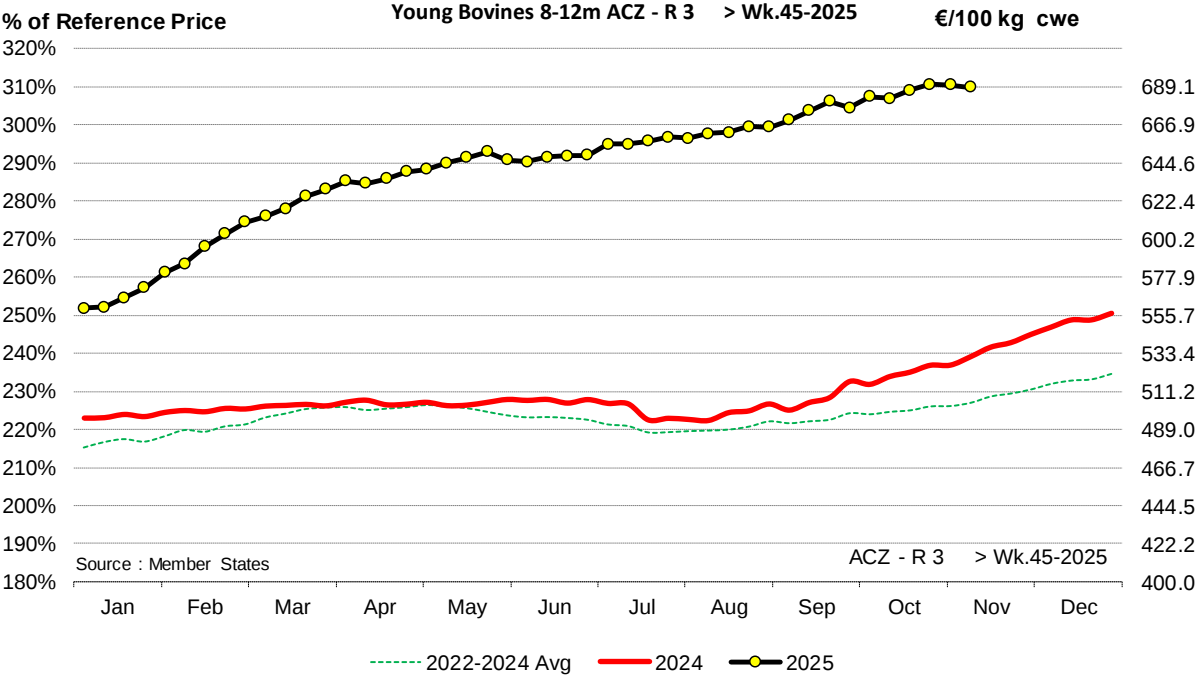
PRICES CARCASSES

EU ACZ R3 Price Comparison between average monthly price November 2024-
October 2025 compared to November 2023 - October 2024



EU EVOLUTION A/C/Z . R3

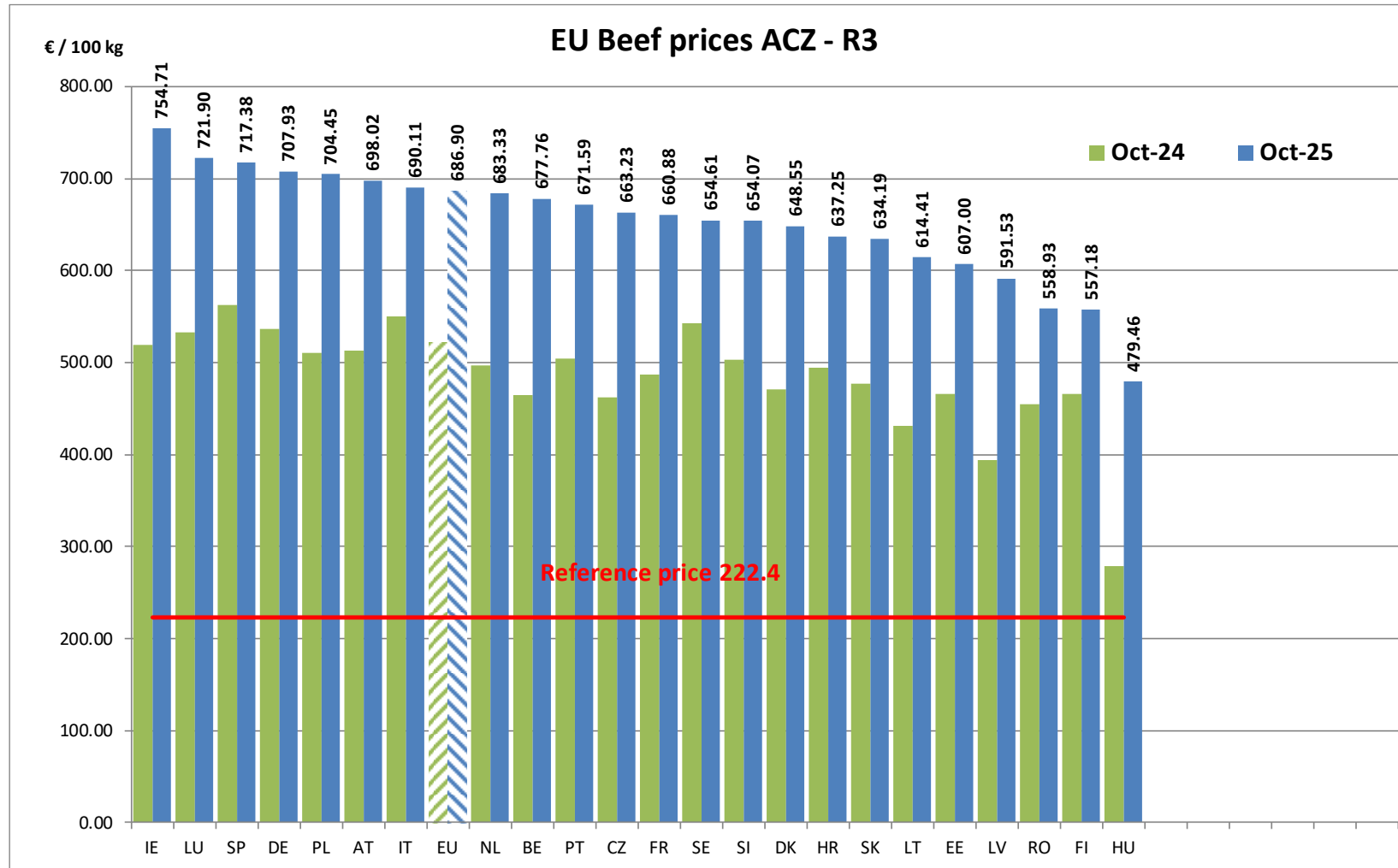
ACZ - R 3 > Wk.45-2025



Price in week 45 :	688.77	Average price in October 2025 :	686.75
% change y/y :	+ 29.59%	% change y/y :	+ 31.58%
% Ref. Price in wk 45 :	309.7%		

PRICES CARCASSES

EU EVOLUTION
A/C/Z.R3

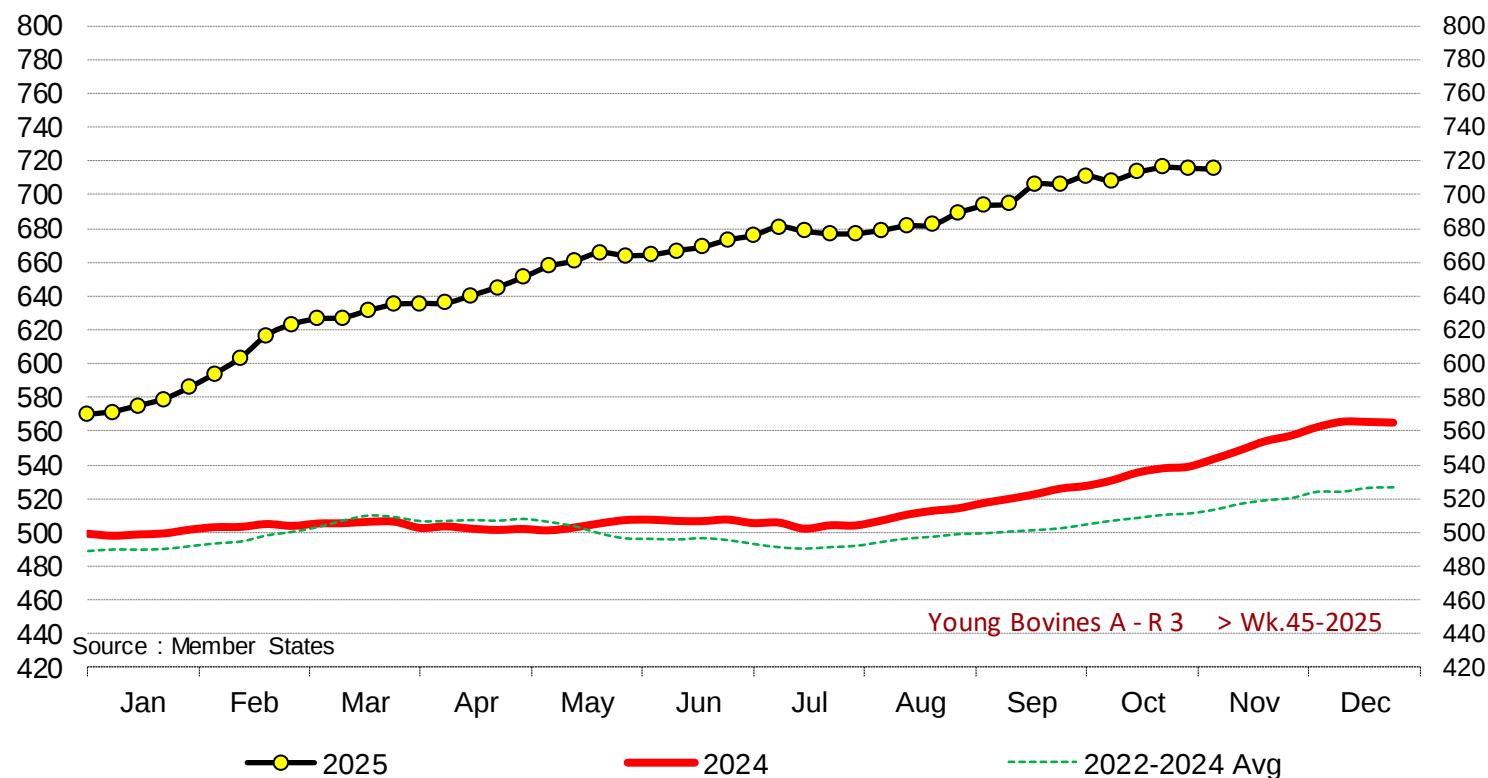


20 November 2025

PRICES CARCASSES

EU EVOLUTION YOUNG BULL – A.R3

Young Bovines A - R 3 > Wk.45-2025



Price in week 45 : **715.08**
% change y/y : **+ 31.6%**

Average price in October 2025 : **712.85**
% change y/y : **+ 33.5%**

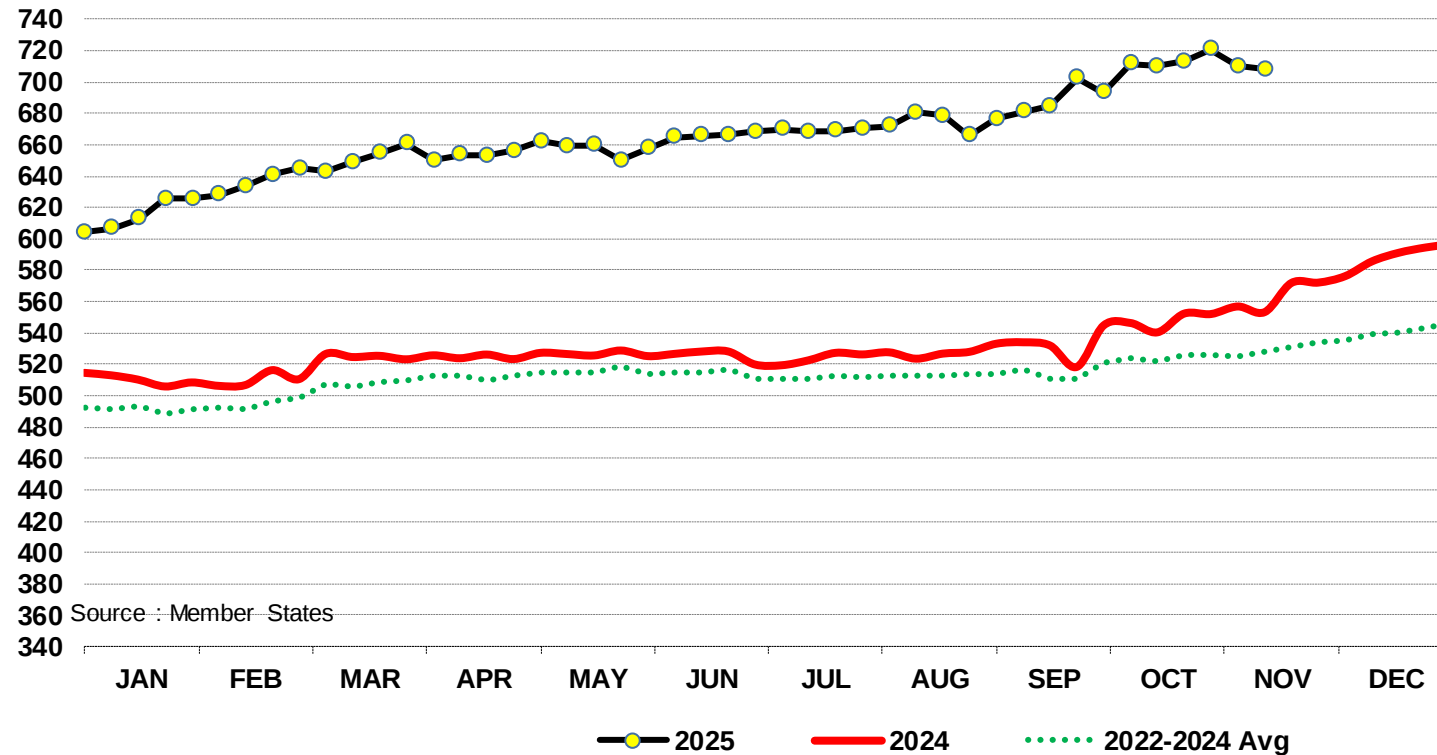
20 November 2025

PRICES CARCASSES

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

In € / 100 kg

Young Bovines 8-12m Z - R 3 > Wk.45-2025



Price in week 45 : **708.17**

09/10/2025

Average price in October 2025 : **713.42**

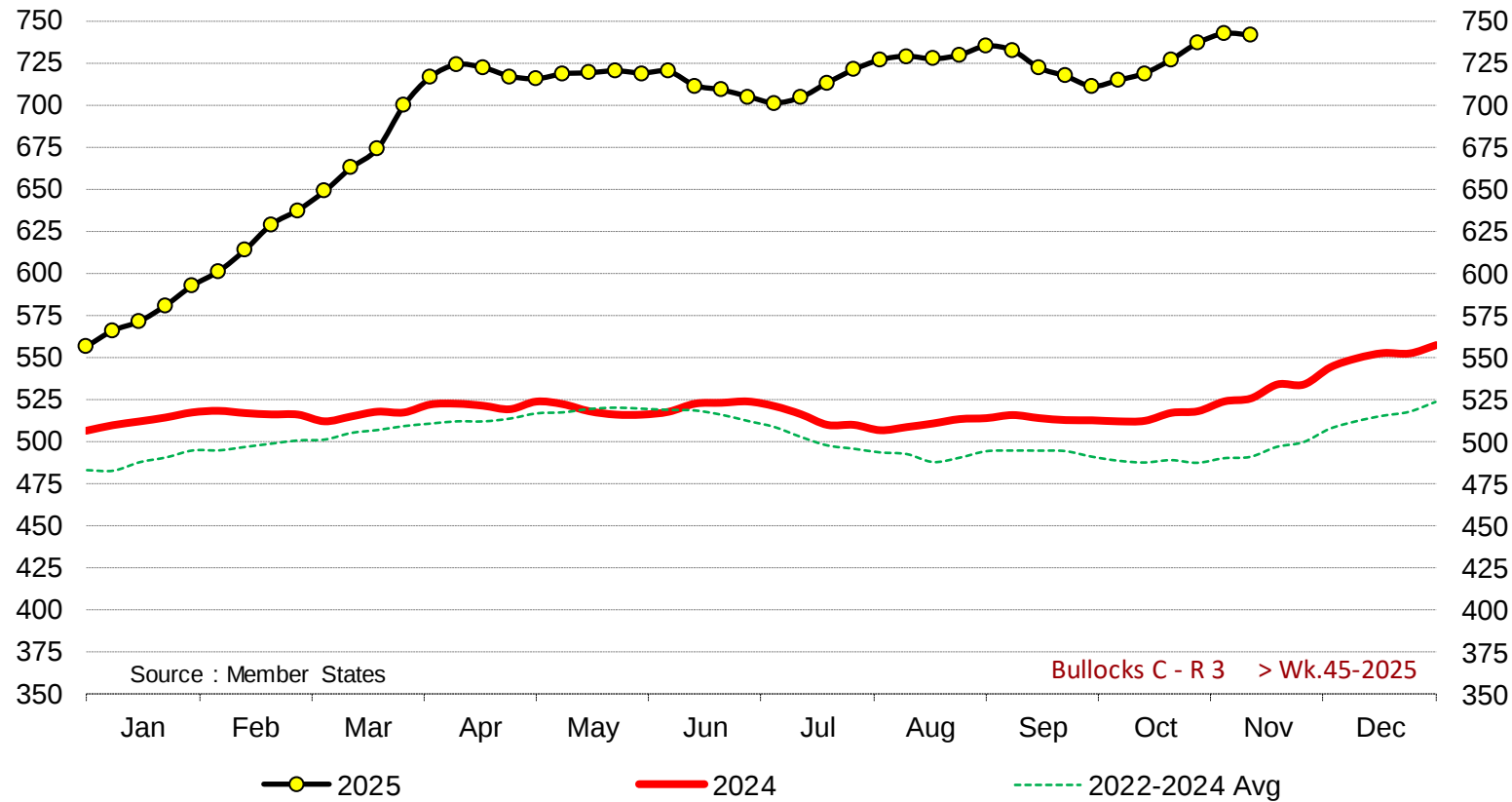
% change y/y : **+ 28.1%**

% change y/y : **+ 30.0%**

PRICES CARCASSES

E.U. EVOLUTION STEER – C.R3

Bullocks C - R 3 > Wk.45-2025



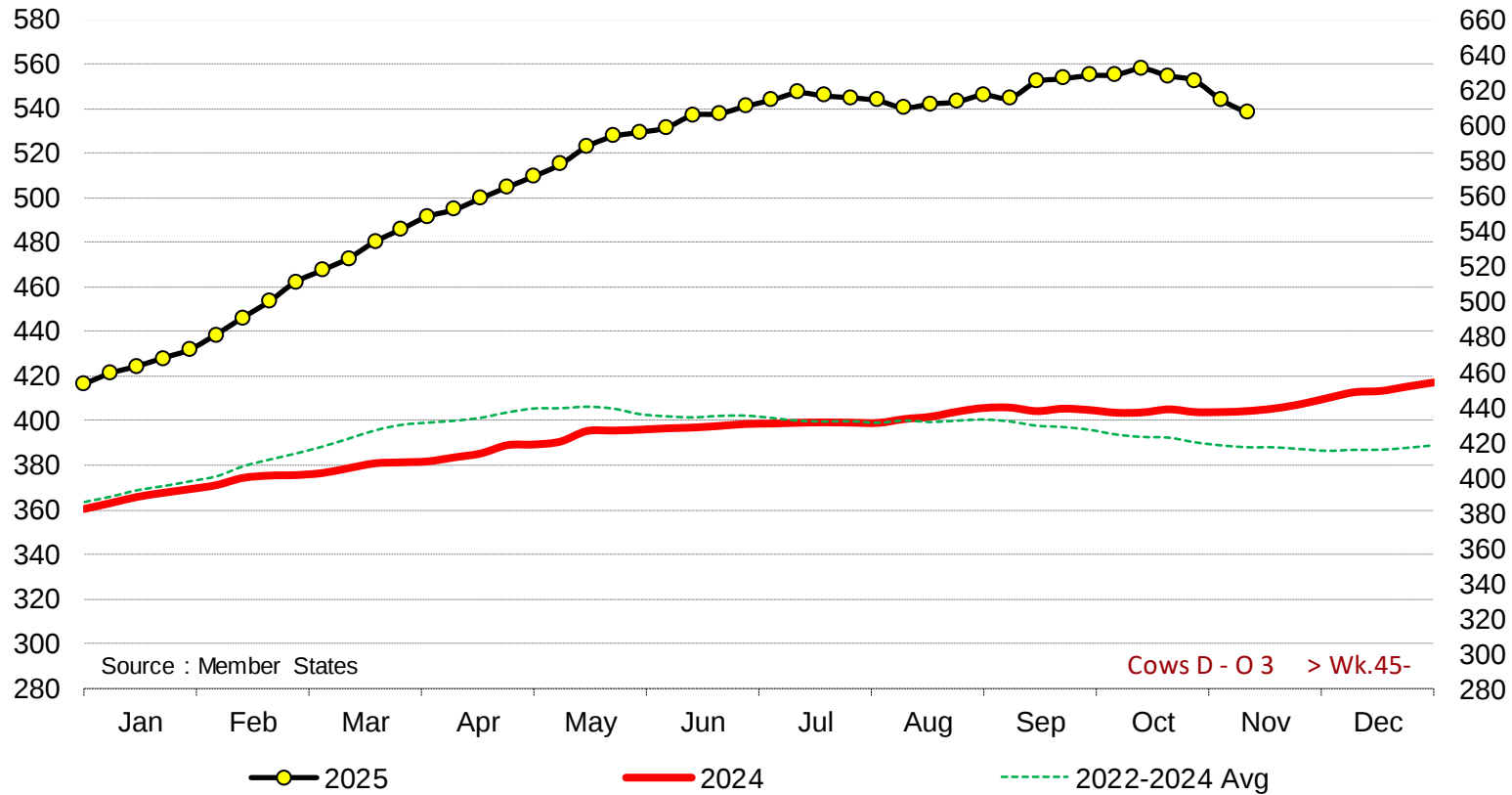
Price in week 45 : **740.97**
% change y/y : **+ 41.1%**

Average price in October 2025 : **727.58**
% change y/y : **+ 41.0%**

PRICES CARCASSES

E.U. EVOLUTION
COW – D.O3

Cows D - O 3 > Wk.45-2025

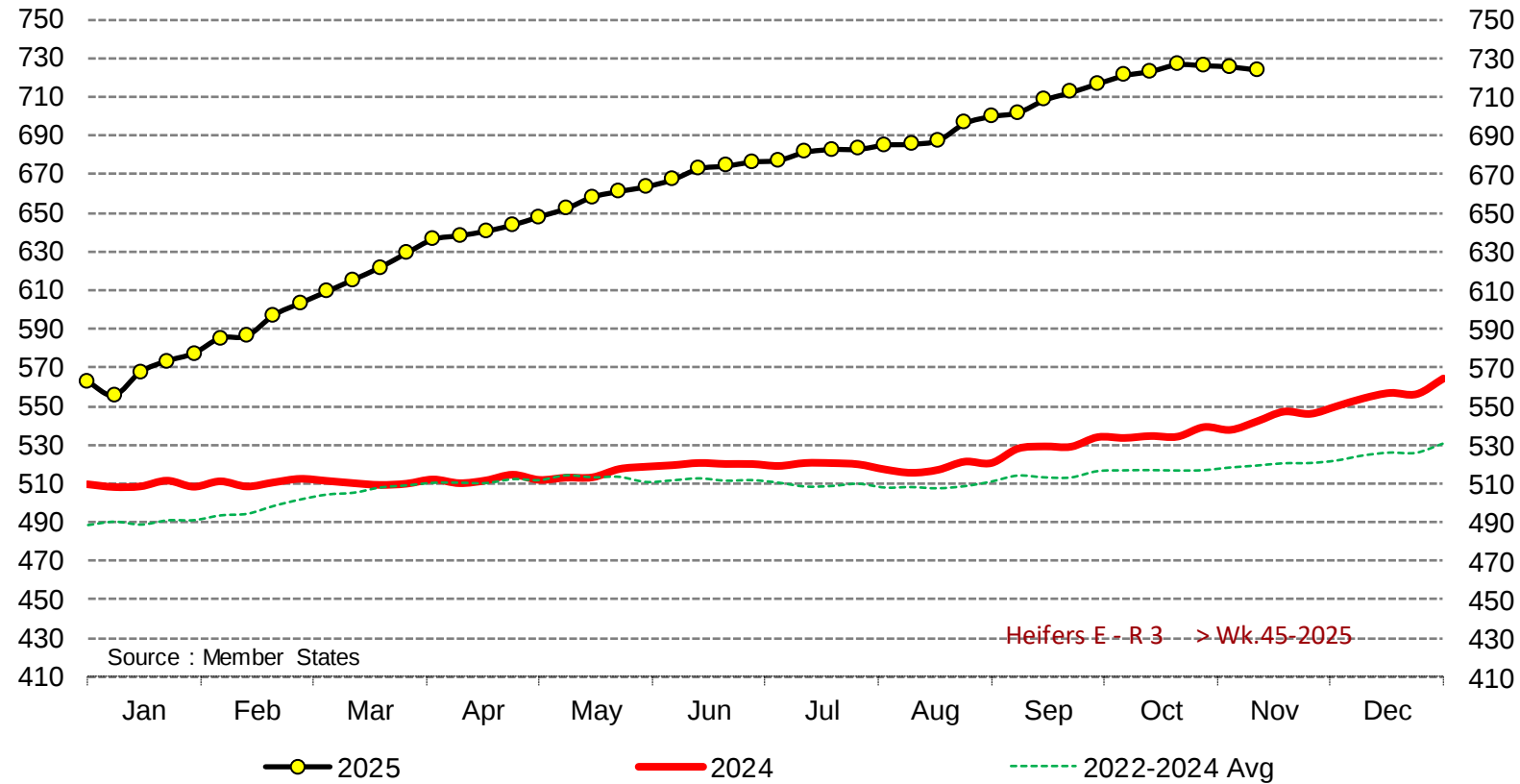


20 November 2025

PRICES CARCASSES

EU EVOLUTION HEIFER – E.R3

Heifers E - R 3 > Wk.45-2025

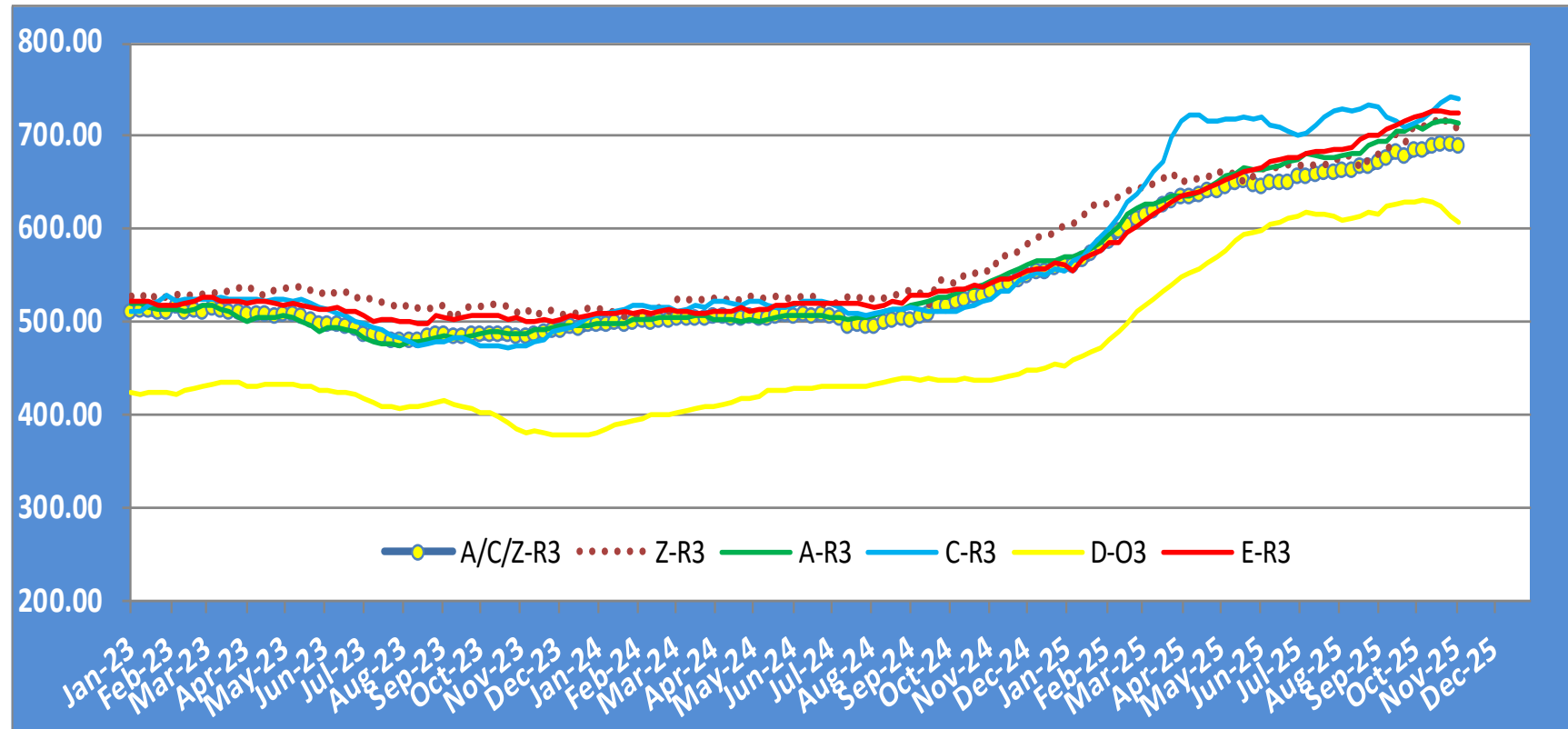


Price in week 45 : **723.99**
% change y/y : **+ 33.5%**

Average price in October 2025 : **724.85**
% change y/y : **+ 35.2%**

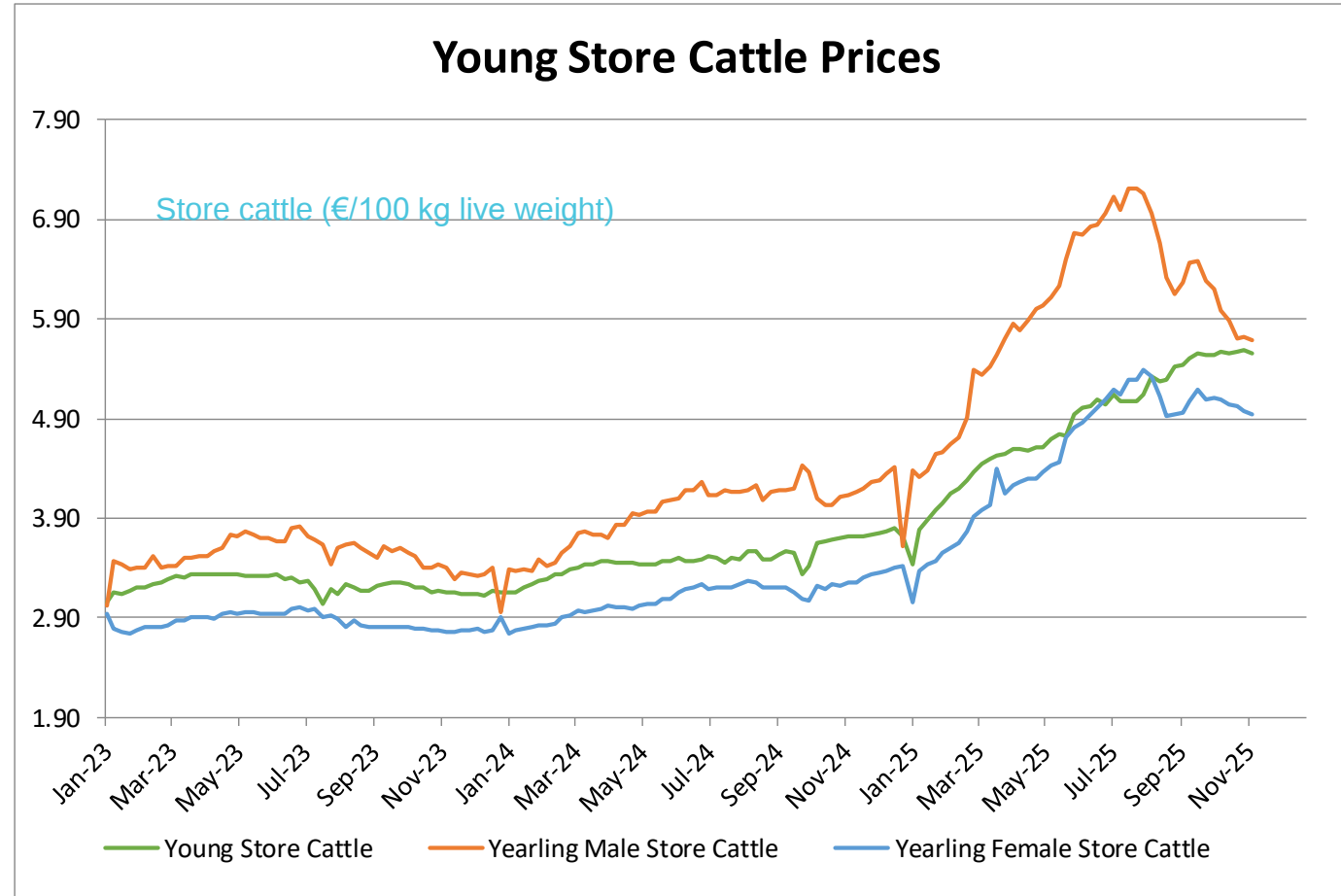
PRICES CARCASSES

EU EVOLUTION
All CAT GLOBAL VIEW



PRICES LIVE BOVINES

EU EVOLUTION STORE CATTLE



Young Store Cattle Price in	Week 45	5.55	Yearling Male Store Cattle Price	5.68
	Change y/y	+49.3%	Change y/y	+37.3%
Yearling Female Store Cattle Price		4.95		
	Change y/y	+52.0%		

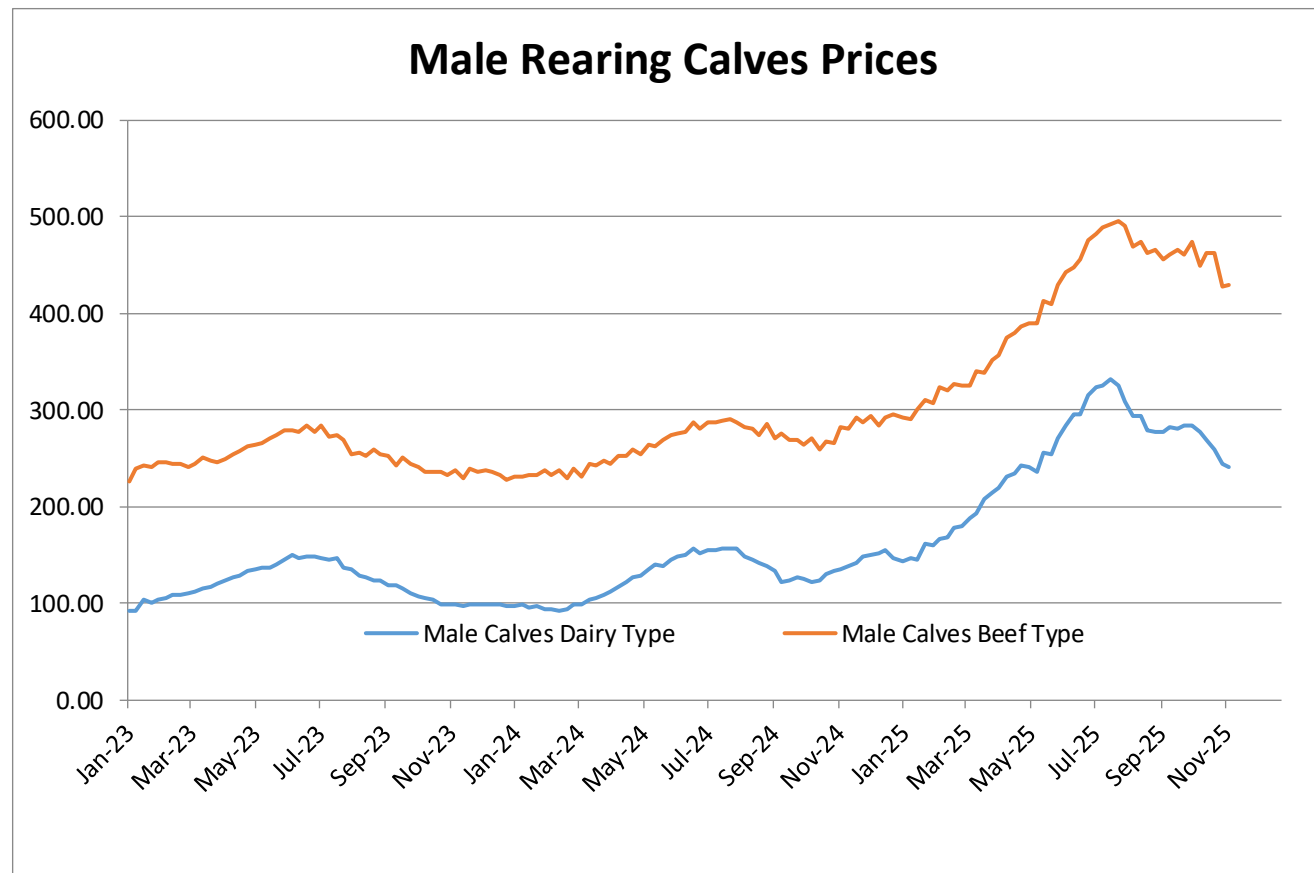
20 November 2025

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 45 430.00
Change y/y +52.3%

Male Rearing Calves Dairy type

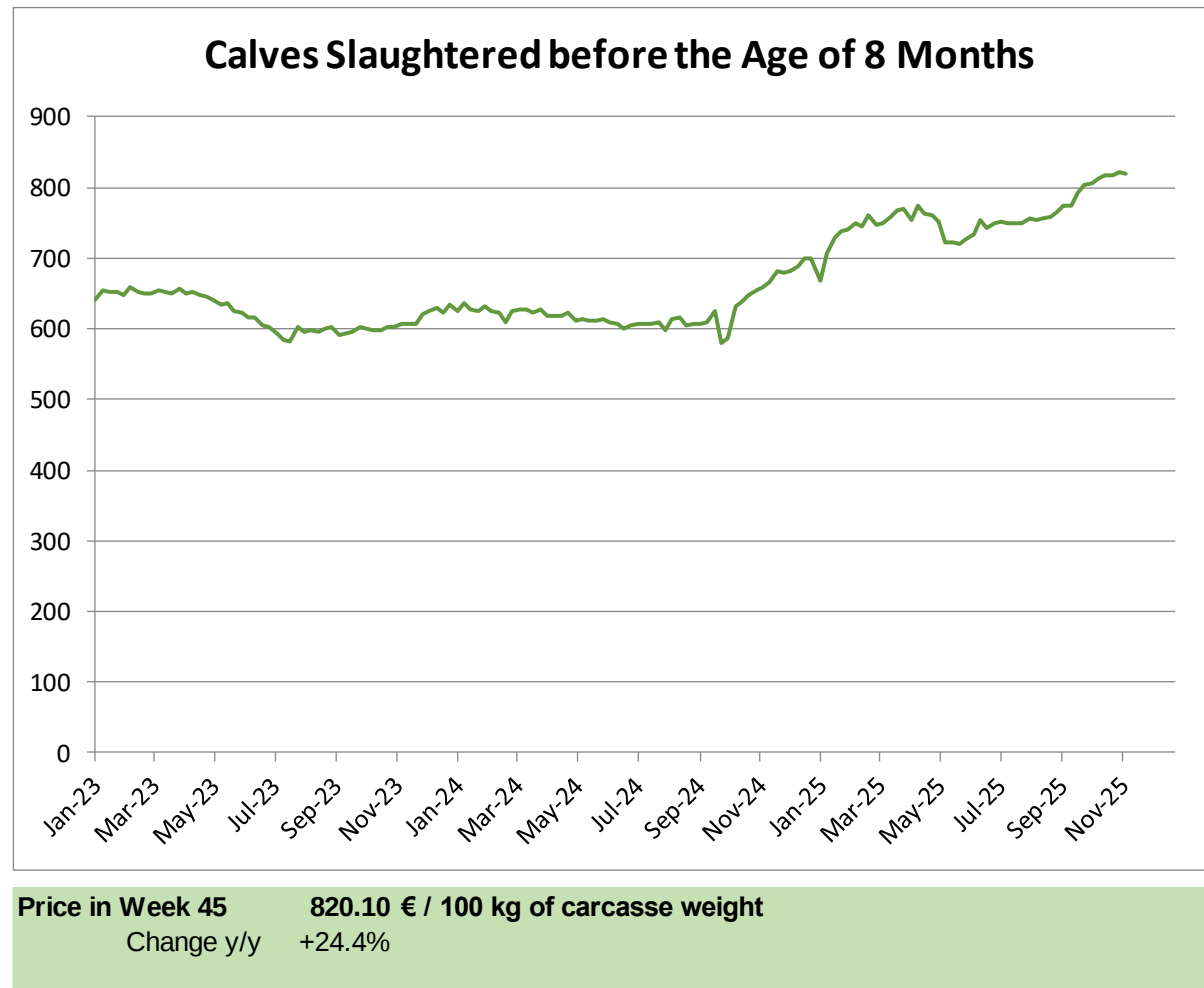
Price in Week 45 240.72
Change y/y +77.6%

20 November 2025

PRICES LIVE BOVINES

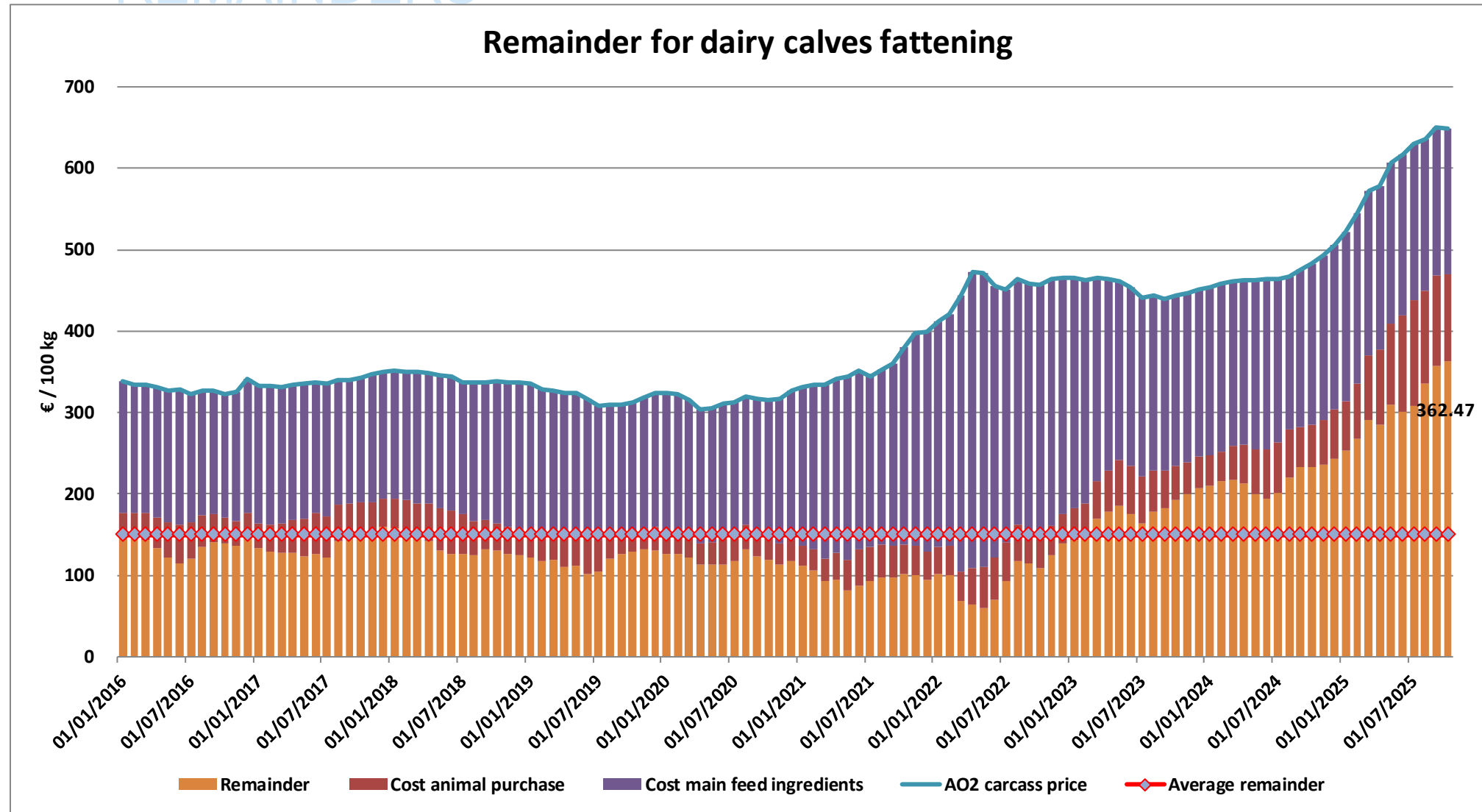
EU EVOLUTION Butcher Calves

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

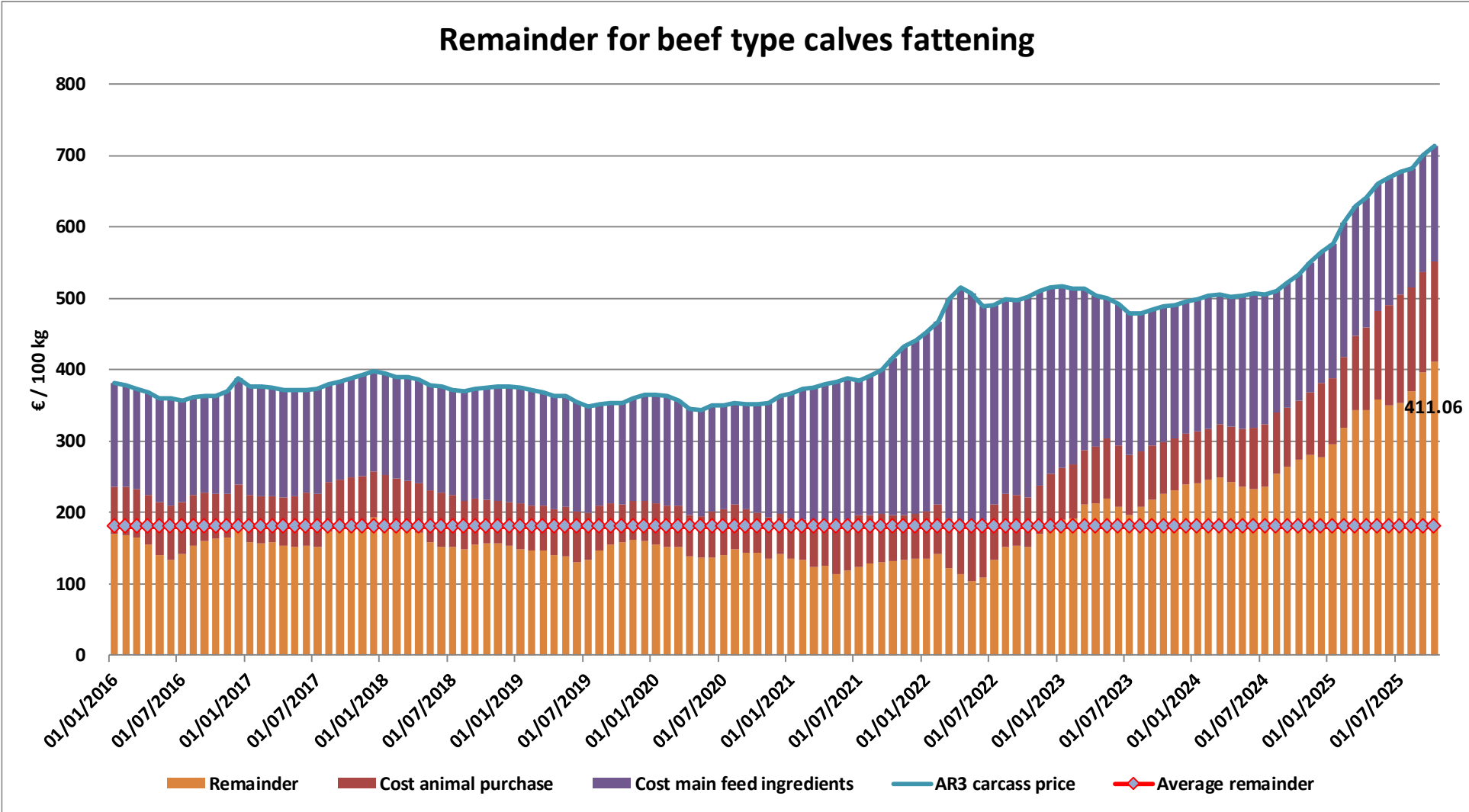


20 November 2025

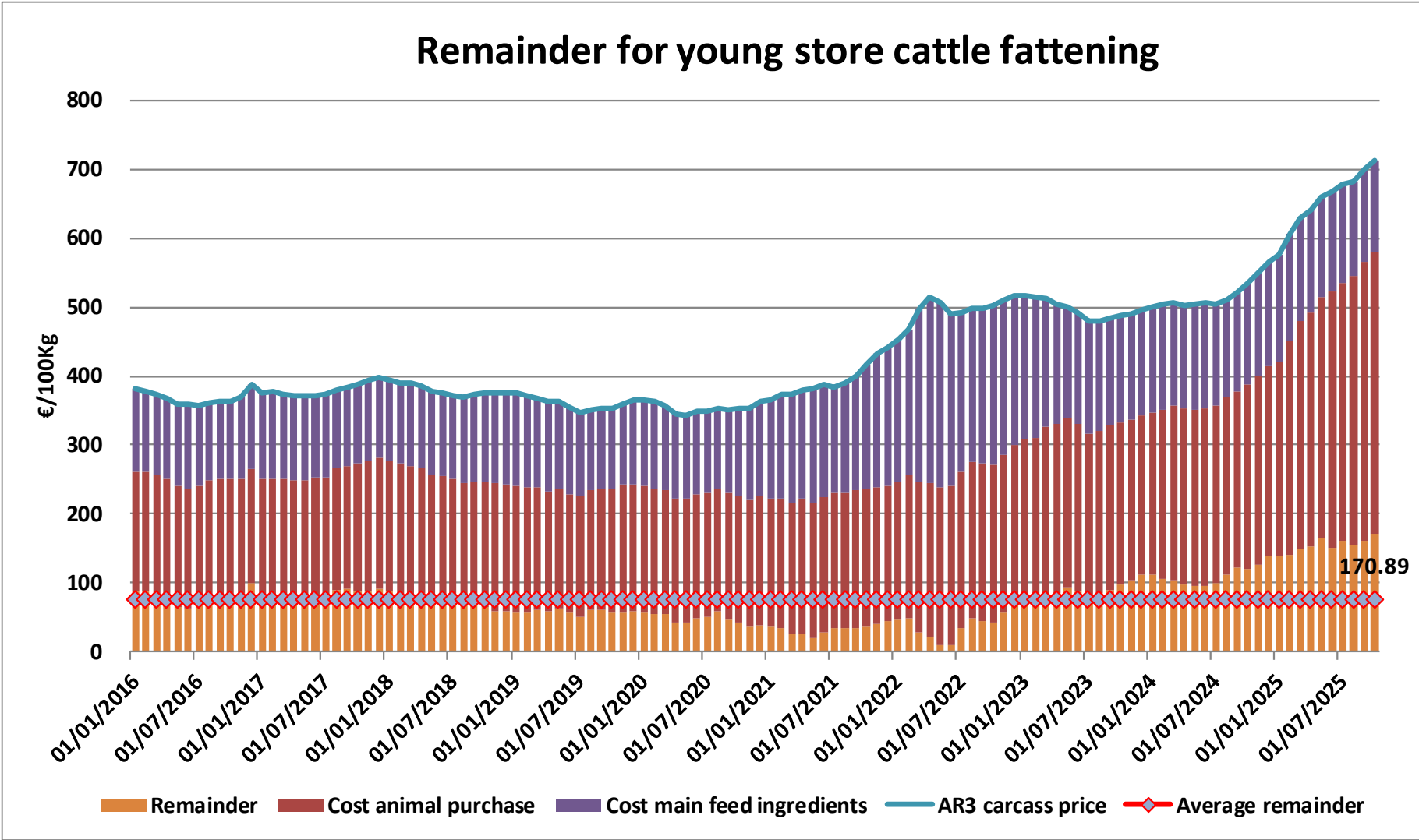
REMAINDERS



REMAINDERS



REMAINDERS



TRADE

EU EXPORTS

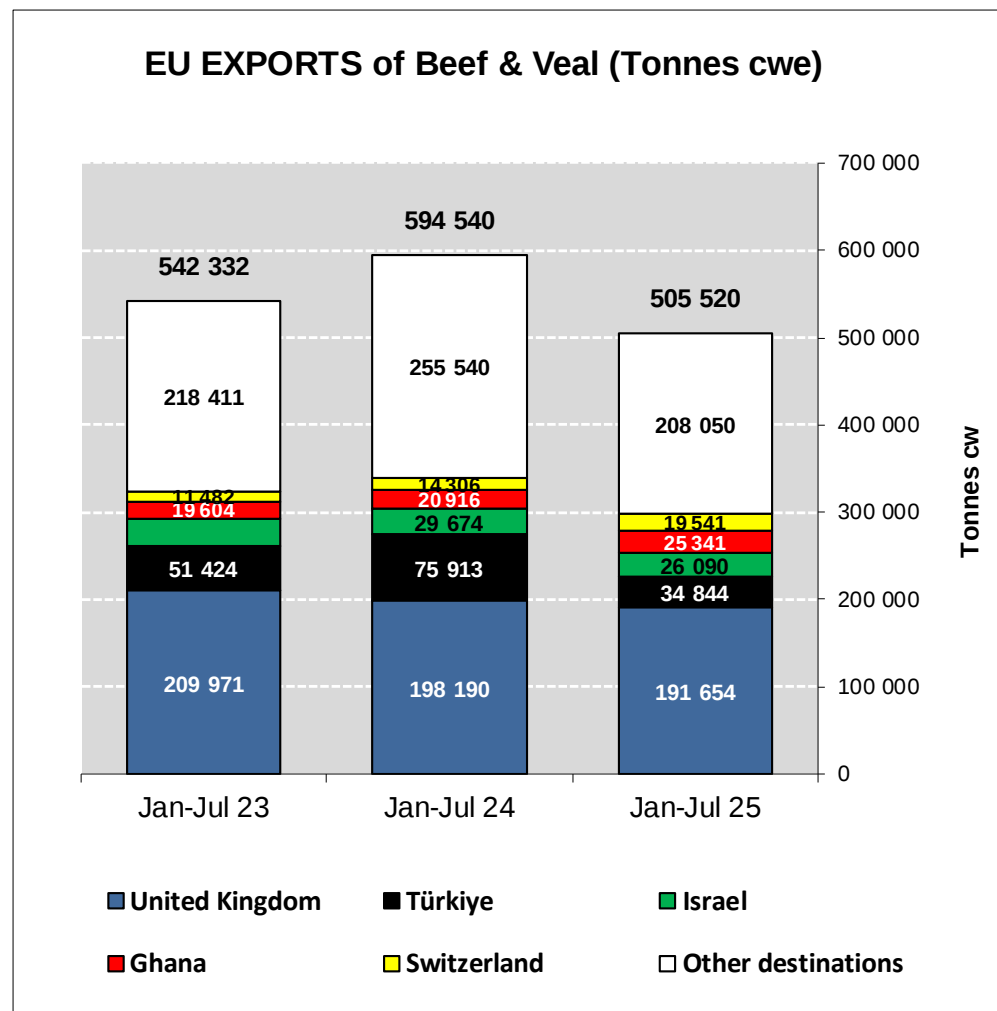
Beef & Live Animals

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

Destinations	2021		2022		2023		2024		Jan-Jul 25		Compared to Jan-Jul 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	344 633	33.4%	366 345	38.9%	368 961	38.4%	343 720	34.6%	191 654	37.9%	- 3.3%
Türkiye	14 953	1.5%	14 168	1.5%	90 924	9.5%	108 619	10.9%	34 844	6.9%	- 54.1%
Israel	66 022	6.4%	63 618	6.7%	45 133	4.7%	50 633	5.1%	26 090	5.2%	- 12.1%
Ghana	47 618	4.6%	32 171	3.4%	33 889	3.5%	35 120	3.5%	25 341	5.0%	+ 21.2%
Switzerland	28 717	2.8%	24 958	2.6%	19 371	2.0%	23 560	2.4%	19 541	3.9%	+ 36.6%
Morocco	11 868	1.2%	8 273	0.9%	25 612	2.7%	31 347	3.2%	18 918	3.7%	+ 22.7%
Algeria	24 111	2.3%	25 459	2.7%	11 905	1.2%	30 953	3.1%	18 442	3.6%	+ 16.7%
Bosnia-Herz.	40 504	3.9%	38 796	4.1%	45 285	4.7%	42 007	4.2%	18 422	3.6%	- 22.1%
Ivory Coast	29 187	2.8%	29 882	3.2%	30 205	3.1%	28 129	2.8%	17 823	3.5%	+ 16.1%
Kosovo	16 478	1.6%	17 069	1.8%	22 694	2.4%	26 606	2.7%	11 079	2.2%	- 26.5%
Lebanon	19 527	1.9%	21 026	2.2%	21 627	2.2%	20 338	2.0%	9 026	1.8%	- 40.9%
Canada	20 670	2.0%	19 928	2.1%	15 907	1.7%	17 563	1.8%	8 891	1.8%	- 0.1%
Hong Kong	44 769	4.3%	10 570	1.1%	21 689	2.3%	17 330	1.7%	7 529	1.5%	- 38.6%
Ukraine	15 078	1.5%	11 969	1.3%	10 088	1.0%	10 770	1.1%	5 786	1.1%	- 6.6%
Philippines	34 671	3.4%	29 922	3.2%	18 333	1.9%	21 644	2.2%	5 574	1.1%	- 61.1%
North Macedonia	14 315	1.4%	9 934	1.1%	9 975	1.0%	11 412	1.1%	5 391	1.1%	- 18.2%
Other Destinations	257 856	25.0%	218 421	23.2%	169 623	17.6%	172 897	17.4%	81 168	16.1%	
Total	1 030 978		942 510		961 222		992 648		505 520		
% change			- 9%		+ 2%		+ 3%		- 15.0%		

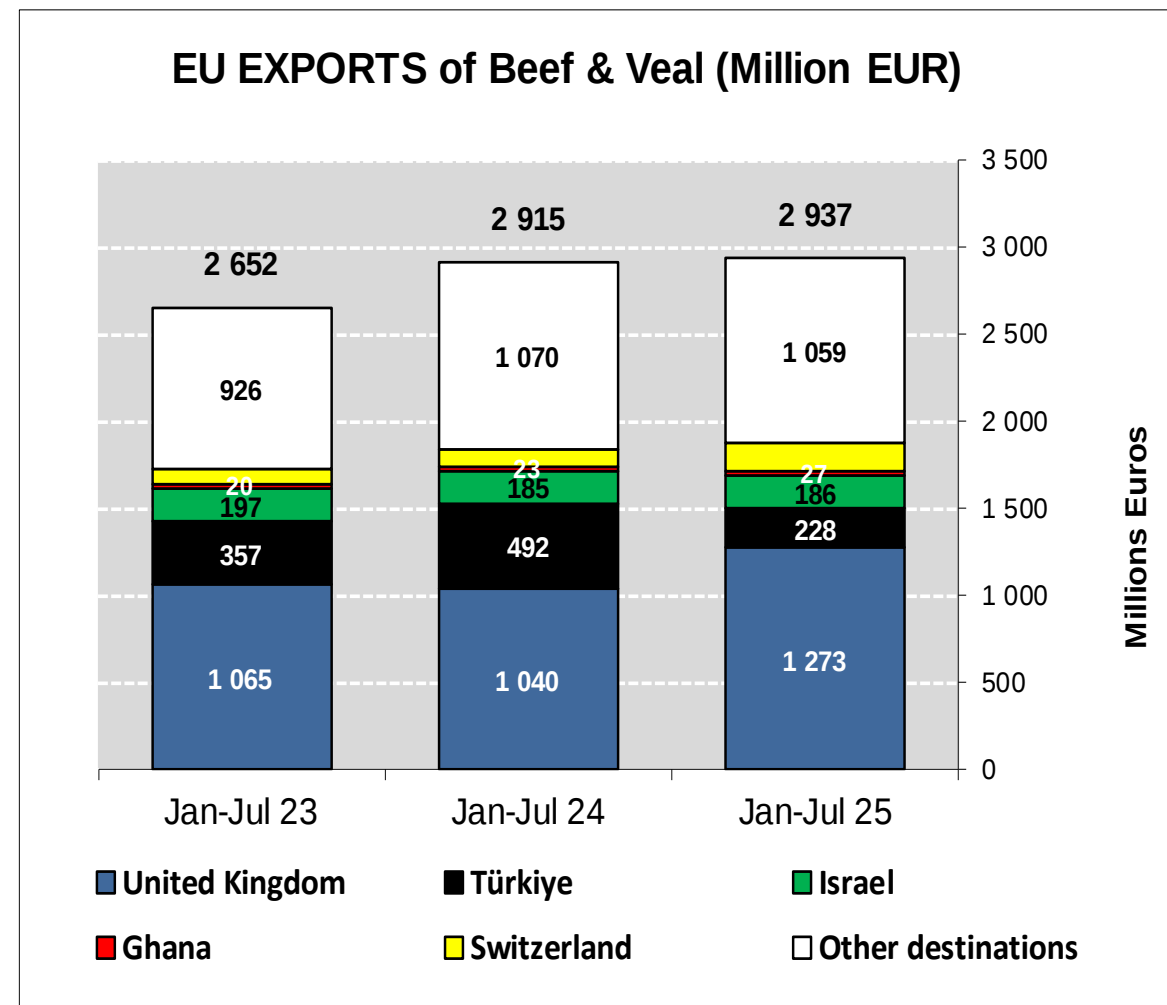
TRADE

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



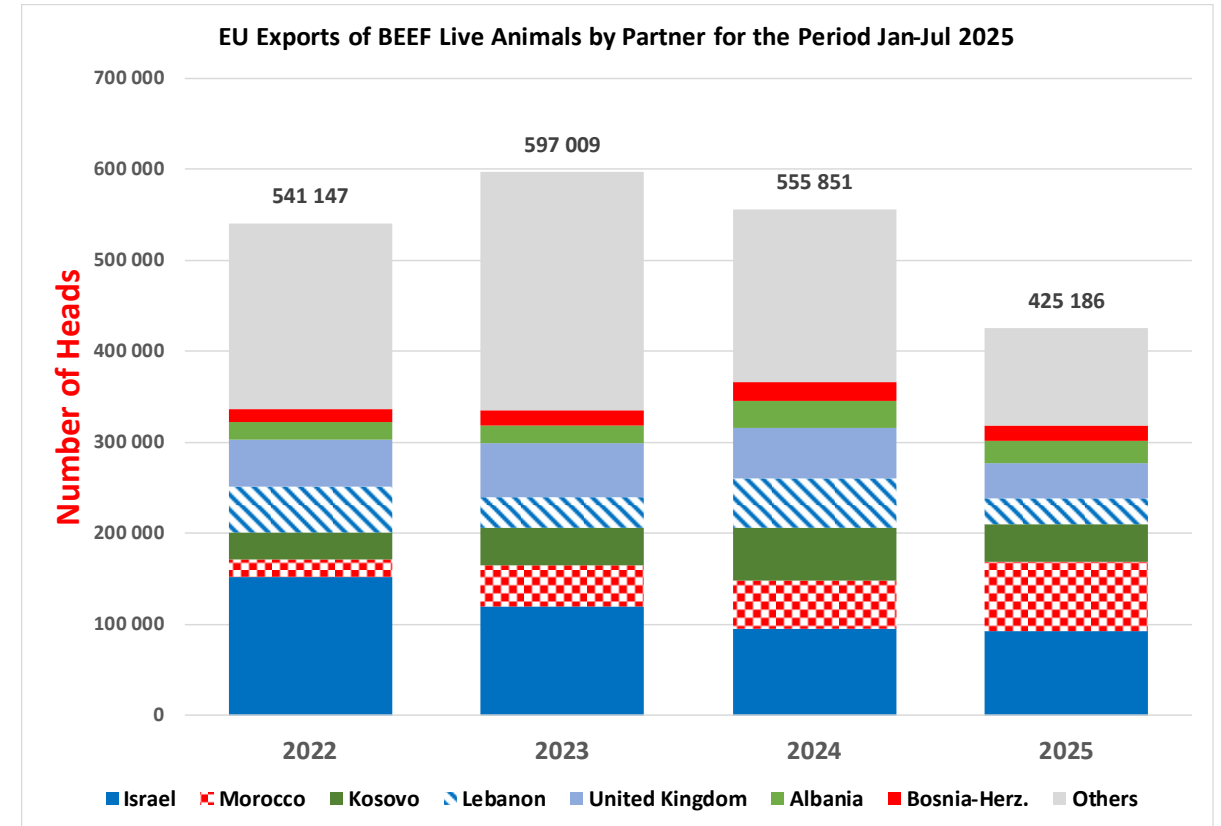
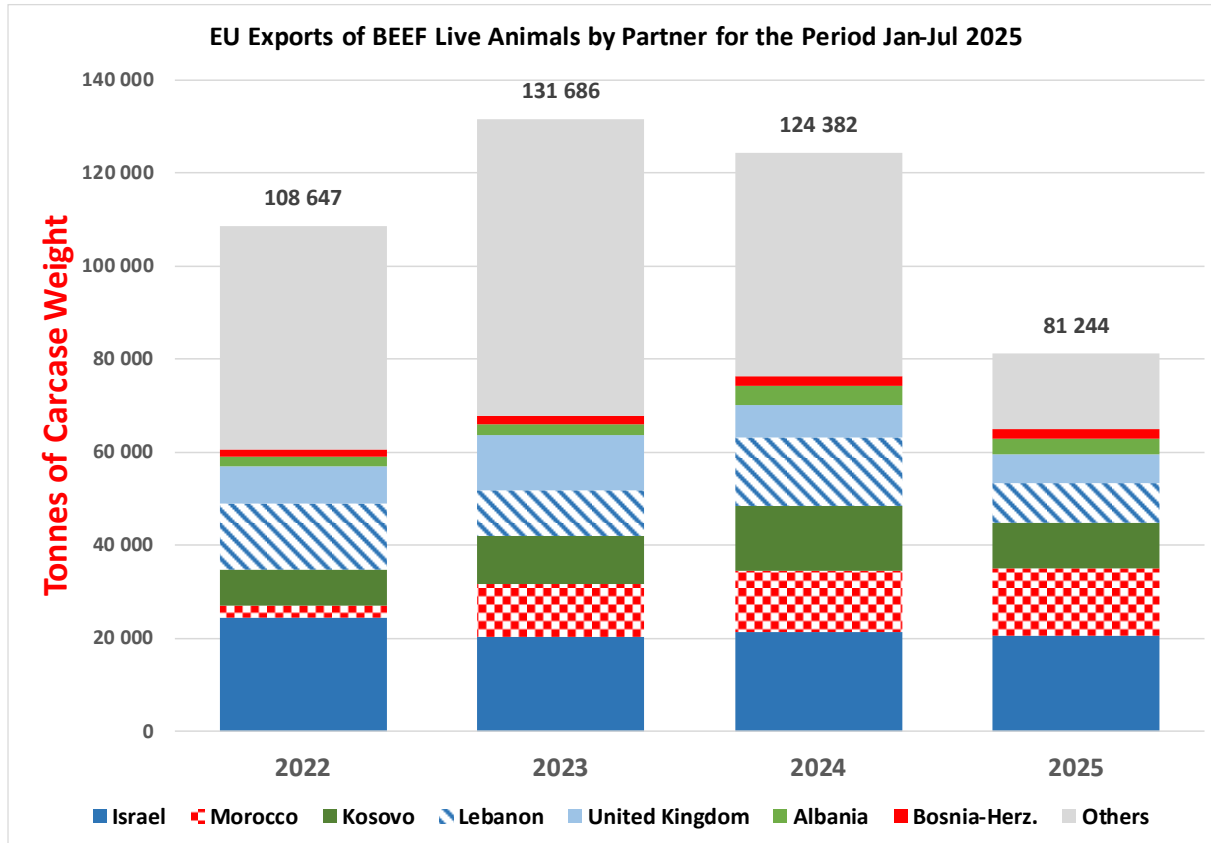
EU EXPORTS

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)

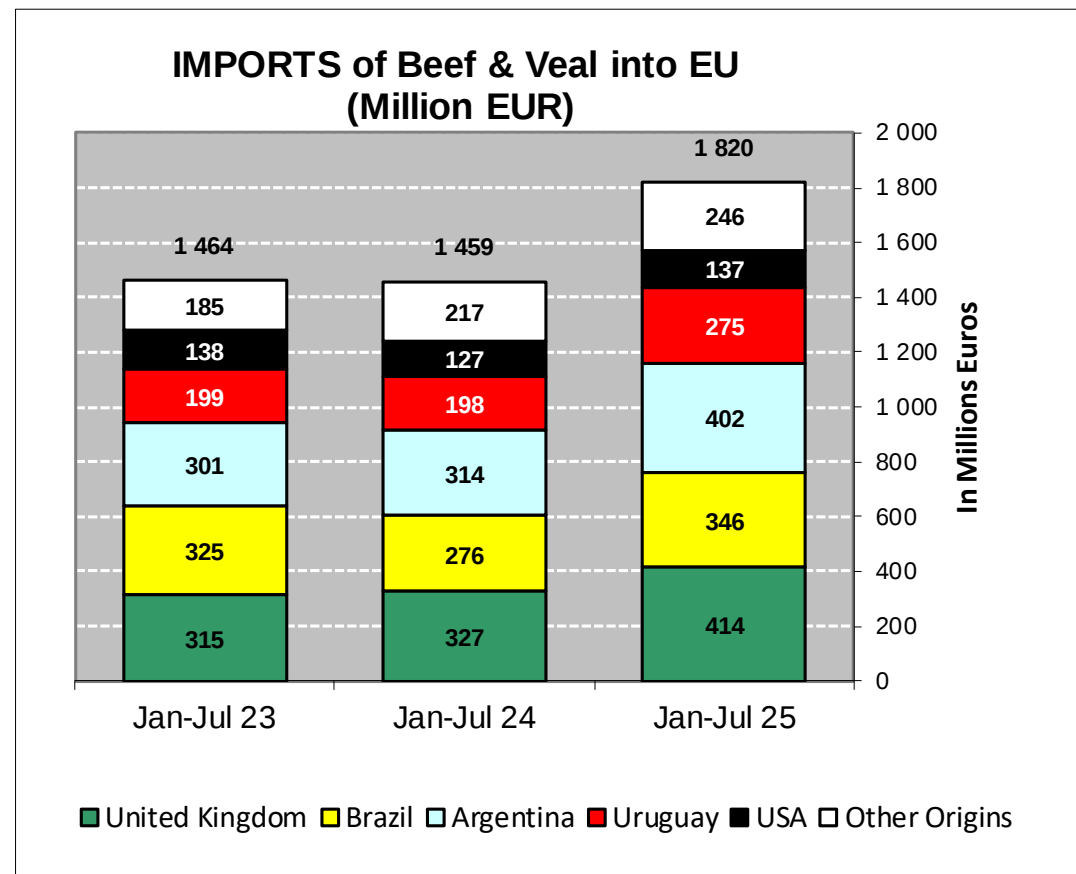
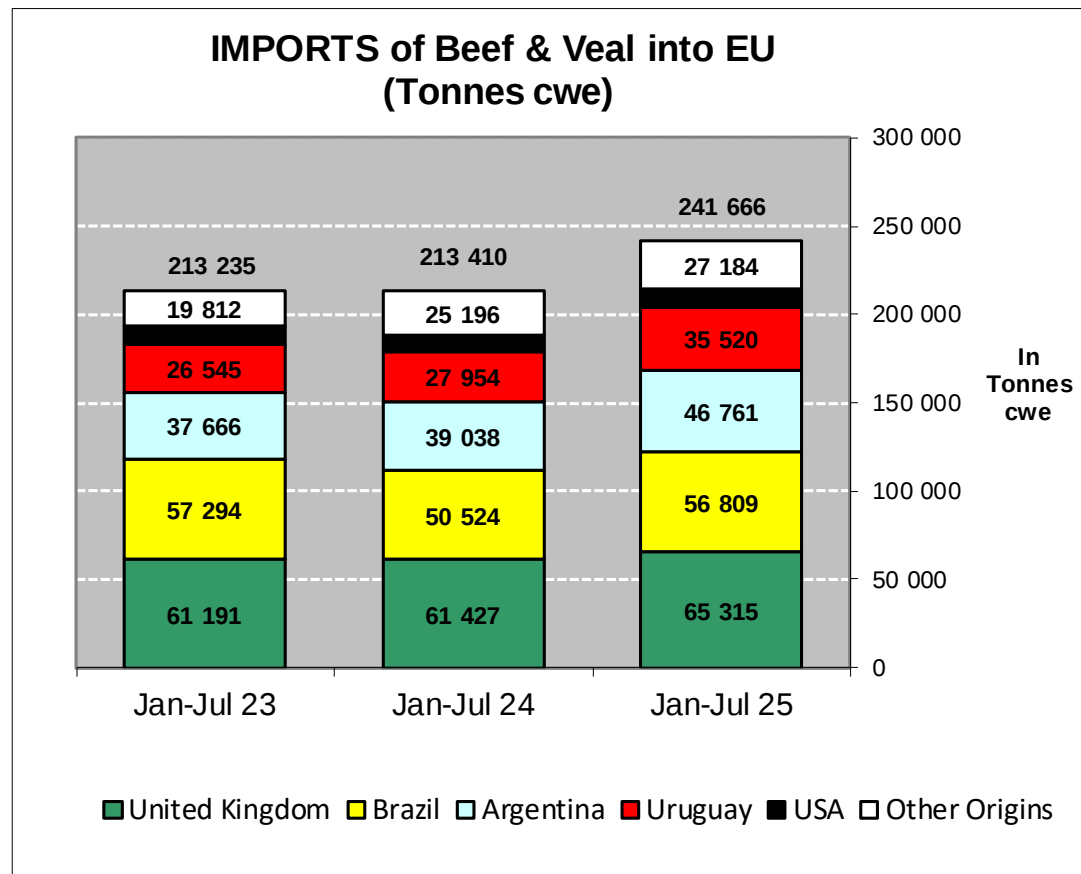
Origins	2021		2022		2023		2024		Jan-Jul 25		Compared to Jan-Jul 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	87 596	28.3%	118 759	33.0%	107 130	30.5%	110 537	29.2%	65 315	27.0%	+ 6.3%
Brazil	81 737	26.4%	86 512	24.0%	86 934	24.7%	87 645	23.2%	56 809	23.5%	+ 12.4%
Argentina	52 300	16.9%	62 584	17.4%	63 094	18.0%	68 761	18.2%	46 761	19.3%	+ 19.8%
Uruguay	42 669	13.8%	37 619	10.5%	41 544	11.8%	44 242	11.7%	35 520	14.7%	+ 27.1%
USA	14 910	4.8%	17 269	4.8%	18 275	5.2%	16 523	4.4%	10 077	4.2%	+ 8.7%
Namibia	1 996	0.6%	5 168	1.4%	7 853	2.2%	15 521	4.1%	6 274	2.6%	- 2.2%
Australia	8 925	2.9%	8 385	2.3%	7 700	2.2%	8 290	2.2%	5 548	2.3%	+ 0.9%
New Zealand	4 380	1.4%	5 202	1.4%	4 532	1.3%	5 848	1.5%	4 341	1.8%	+ 28.6%
Paraguay	3 933	1.3%	5 404	1.5%	4 774	1.4%	5 303	1.4%	3 475	1.4%	+ 23.3%
Switzerland	4 714	1.5%	4 730	1.3%	3 627	1.0%	3 793	1.0%	2 123	0.9%	+ 9.2%
Botswana	331	0.1%	928	0.3%	1 606	0.5%	7 718	2.0%	2 009	0.8%	- 32.8%
Canada	1 816	0.6%	2 172	0.6%	1 456	0.4%	1 102	0.3%	952	0.4%	+ 61.0%
Japan	1 478	0.5%	2 160	0.6%	834	0.2%	1 171	0.3%	758	0.3%	+ 39.9%
Serbia	963	0.3%	1 058	0.3%	812	0.2%	641	0.2%	463	0.2%	+ 25.6%
North Macedonia	61	0.0%	33	0.0%	29	0.0%	50	0.0%	389	0.2%	+++
Chile	238	0.1%	378	0.1%	365	0.1%	346	0.1%	352	0.1%	+ 77.3%
Other Destinations	1 220	0.4%	1 633	0.5%	926	0.3%	967	0.3%	501	0.2%	
Total	309 267		359 994		351 492		378 458		241 666		
% change			+ 16%		- 2%		+ 8%		+ 13.2%		

TRADE

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

EU IMPORTS

Beef & Live Animals (Excl Fats)

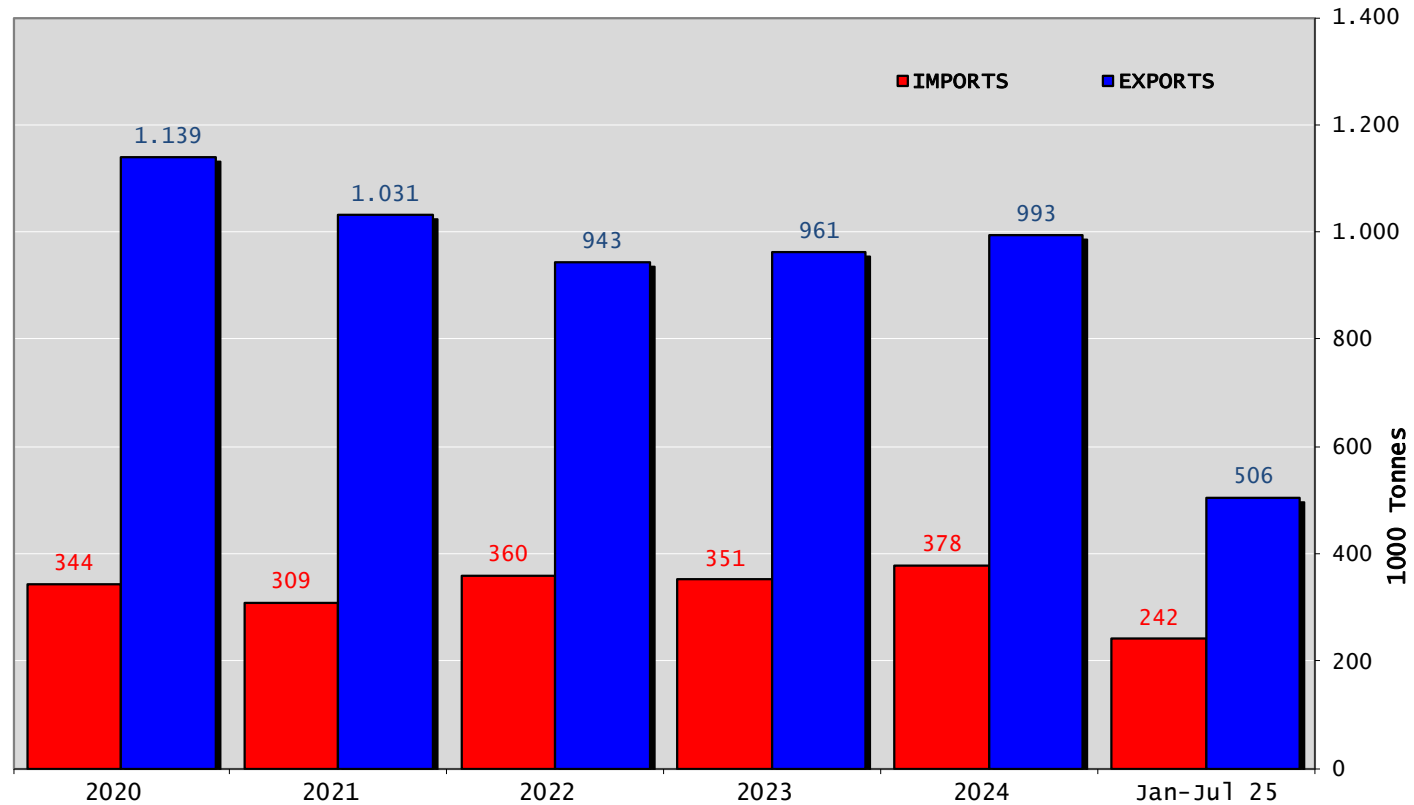


TRADE

EUTRADE BALANCE

Beef & Live Animals

Trade Balance of Beef Products and Live Animals

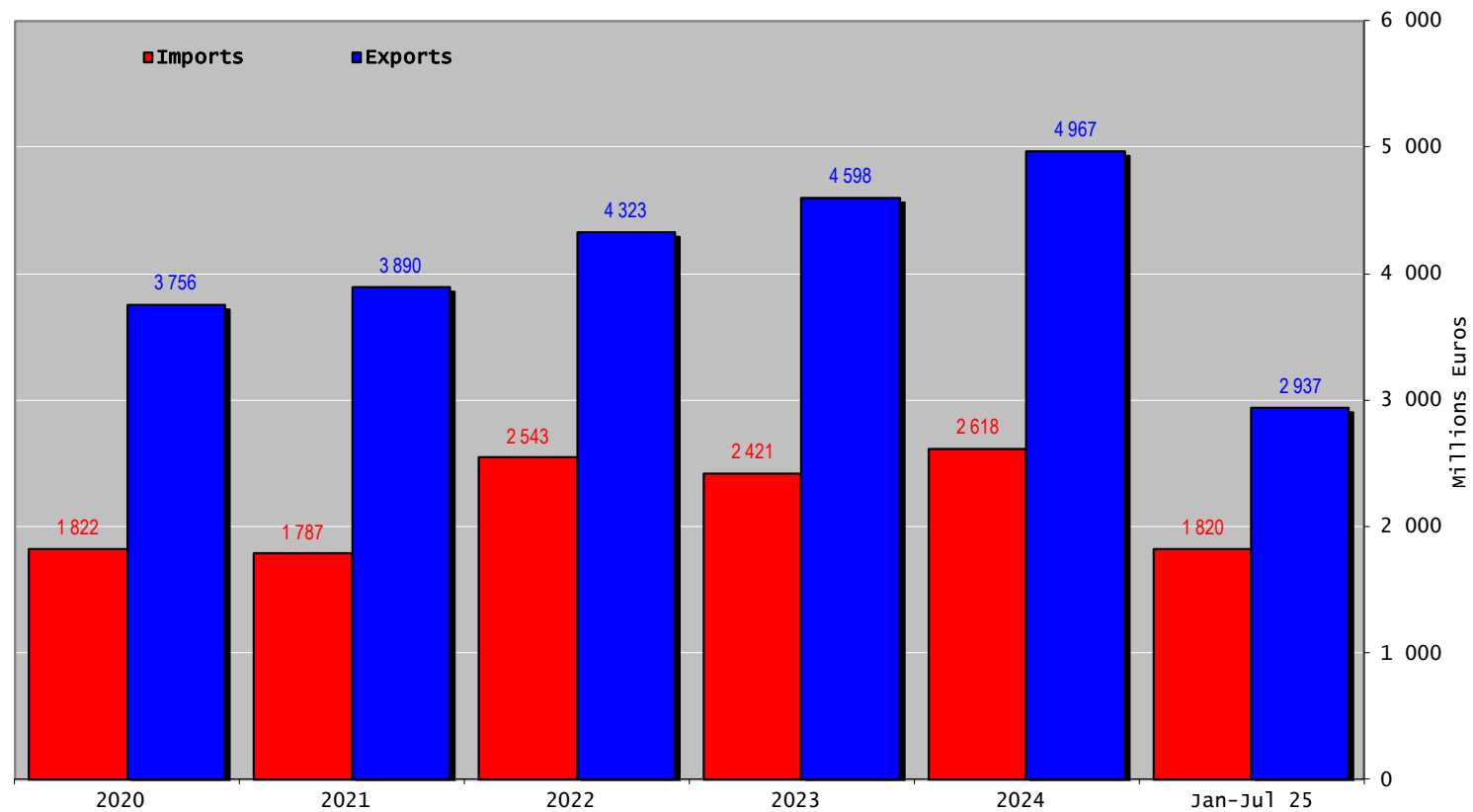


TRADE

EU TRADE BALANCE

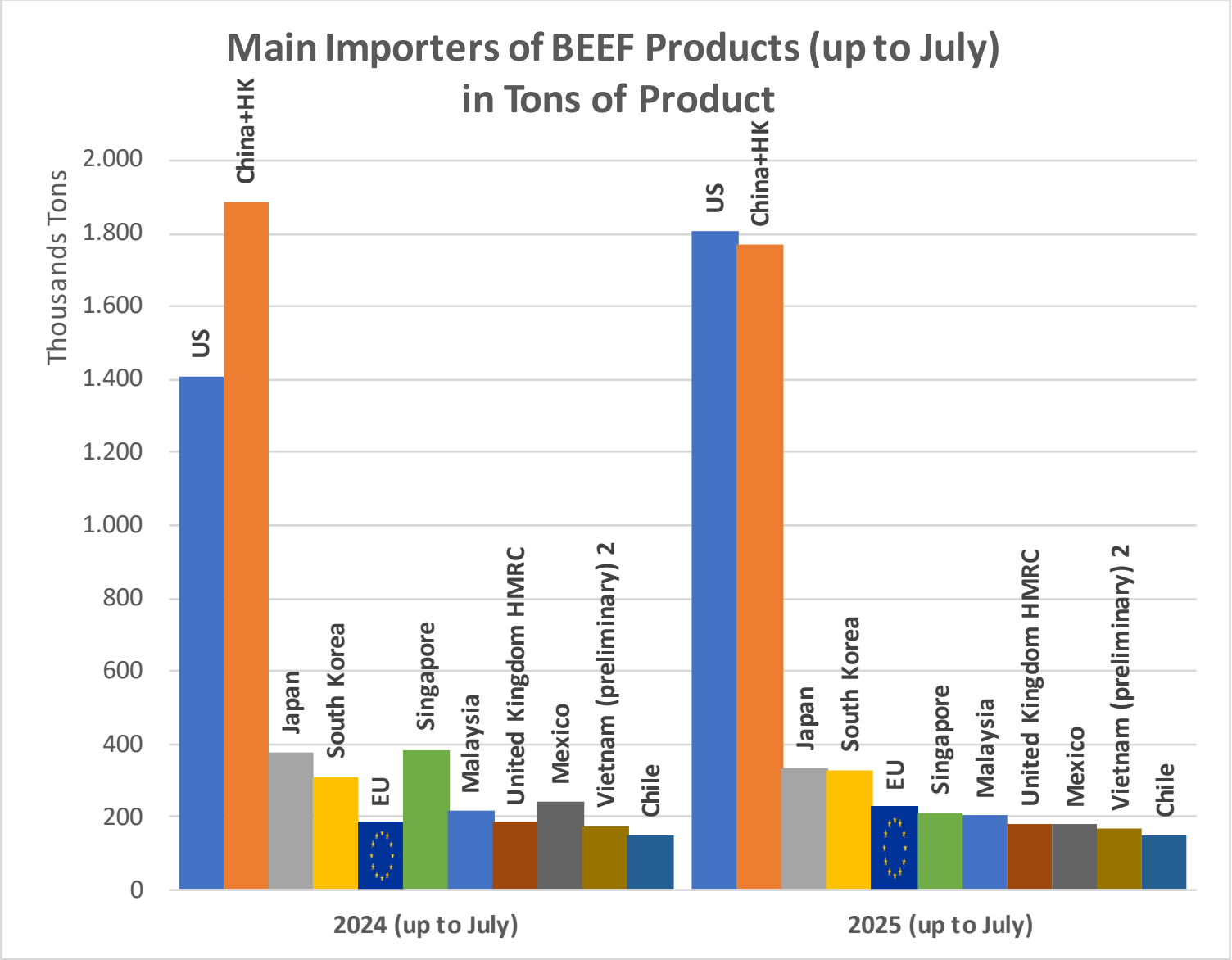
Beef & Live Animals

Trade Balance of Beef Products and Live Animals



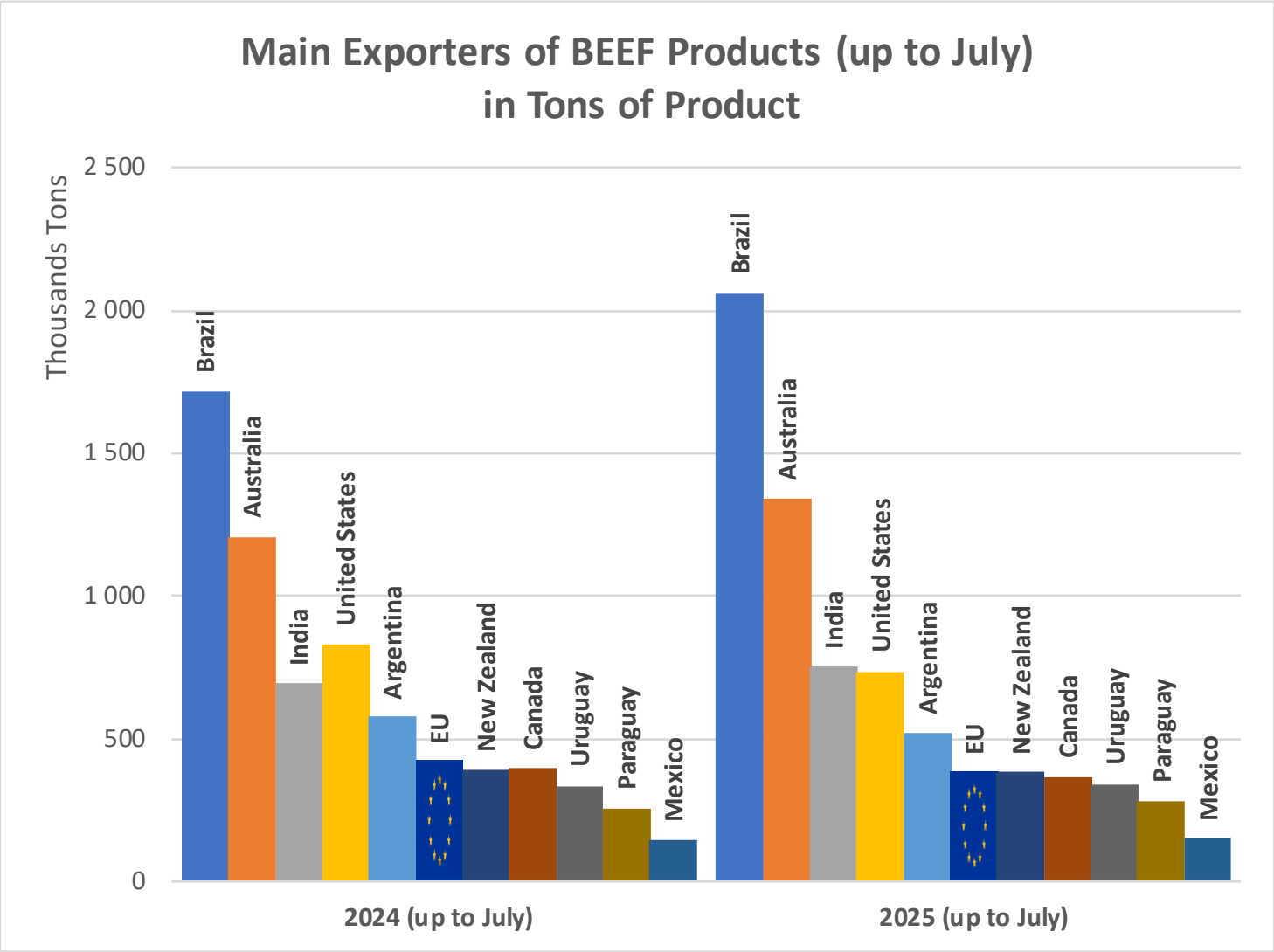
WORLD BEEF MARKET

BEEF MAIN IMPORTERS



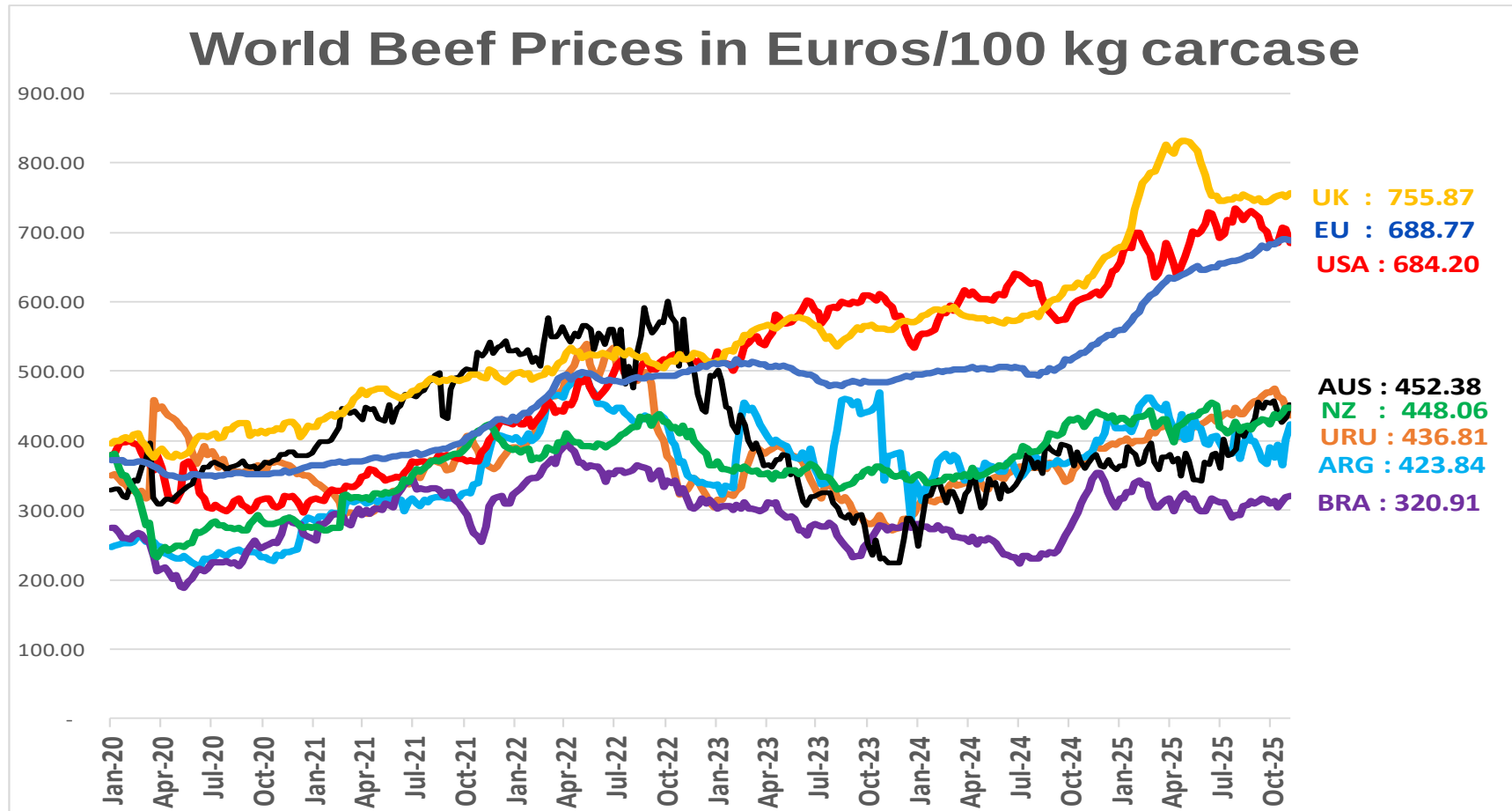
WORLD BEEF MARKET

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](#)

20 November 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/>