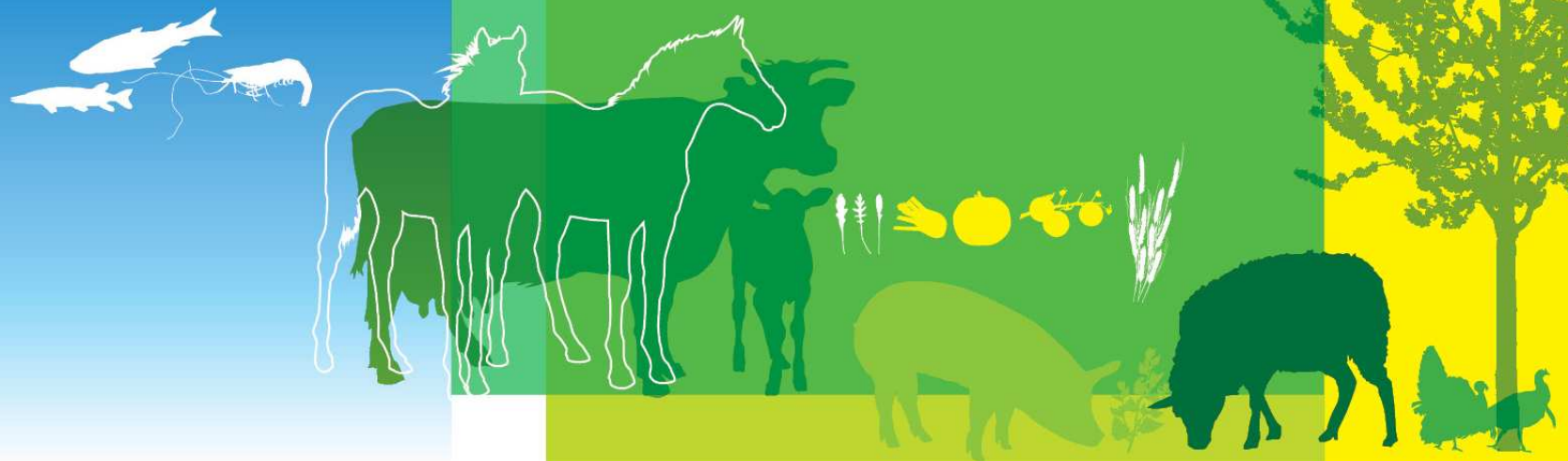


# Comité Bovins viande

## Situation des marchés

4 septembre 2013

Montreuil

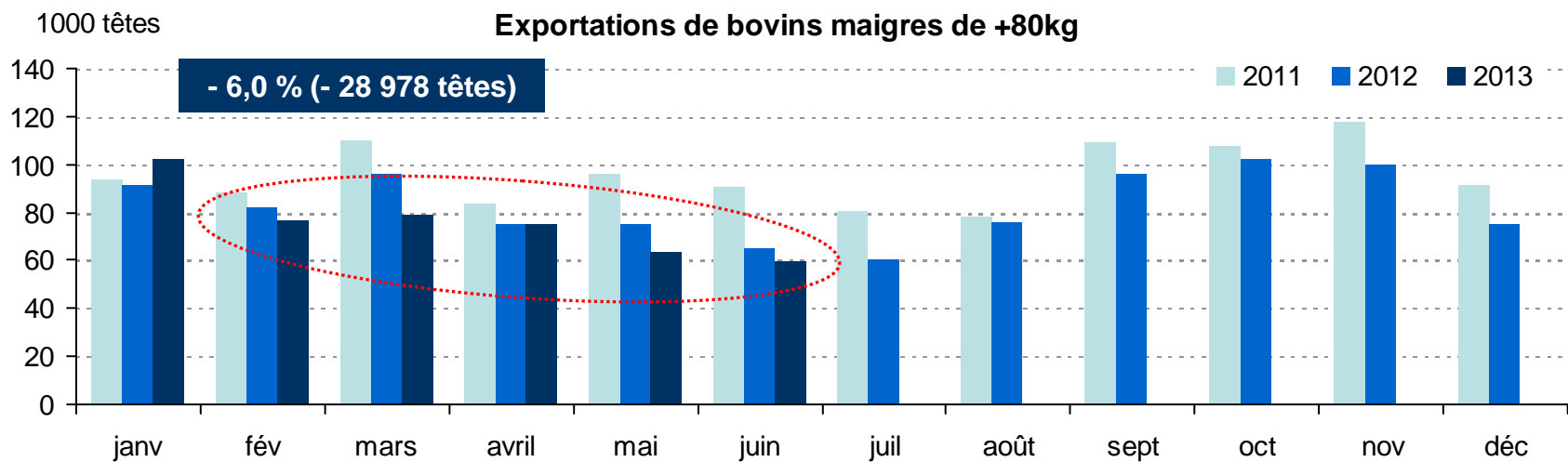
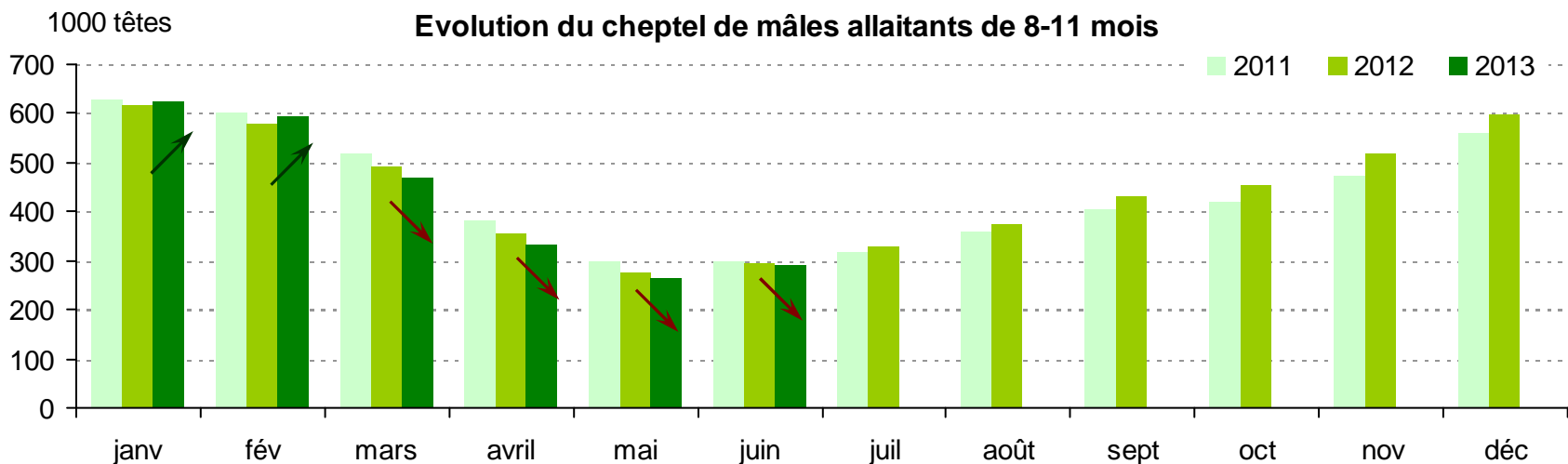




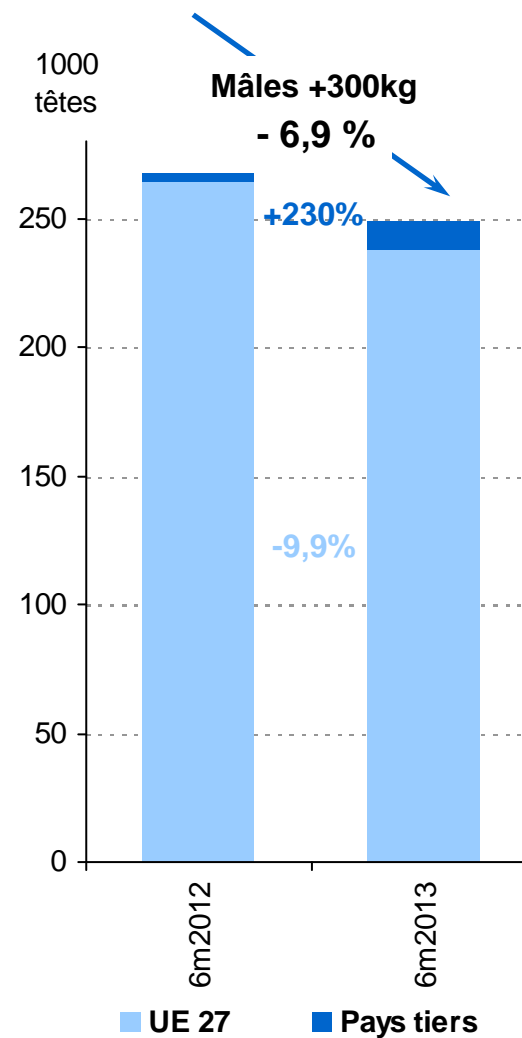
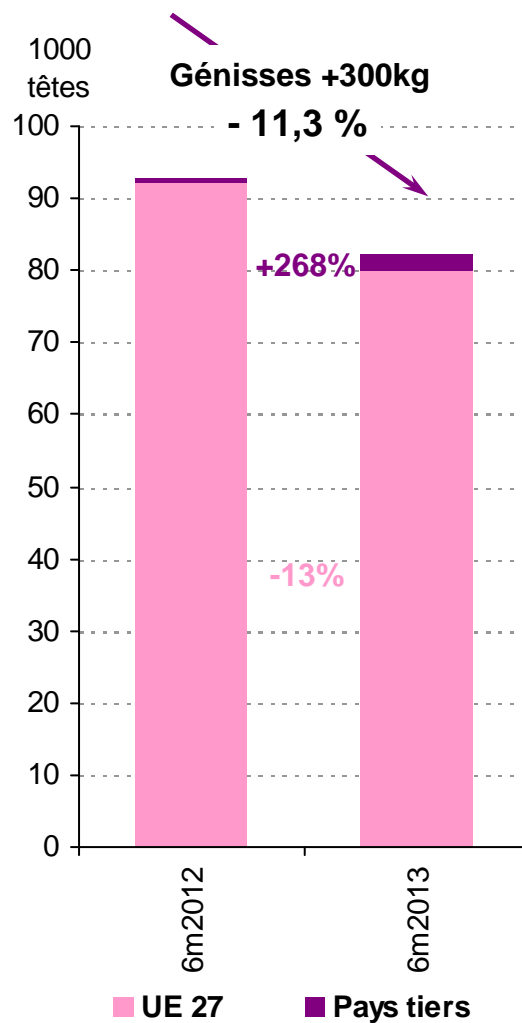
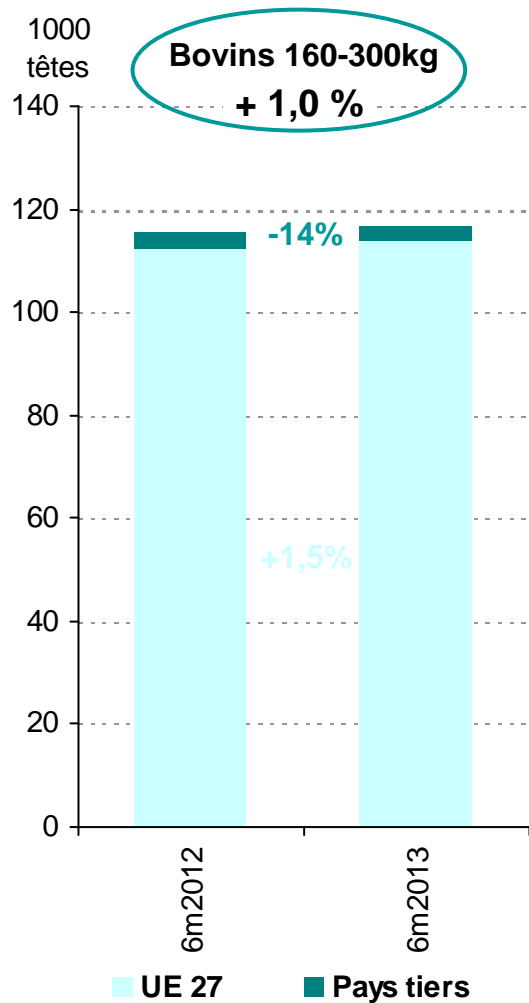
# Marché du broutard



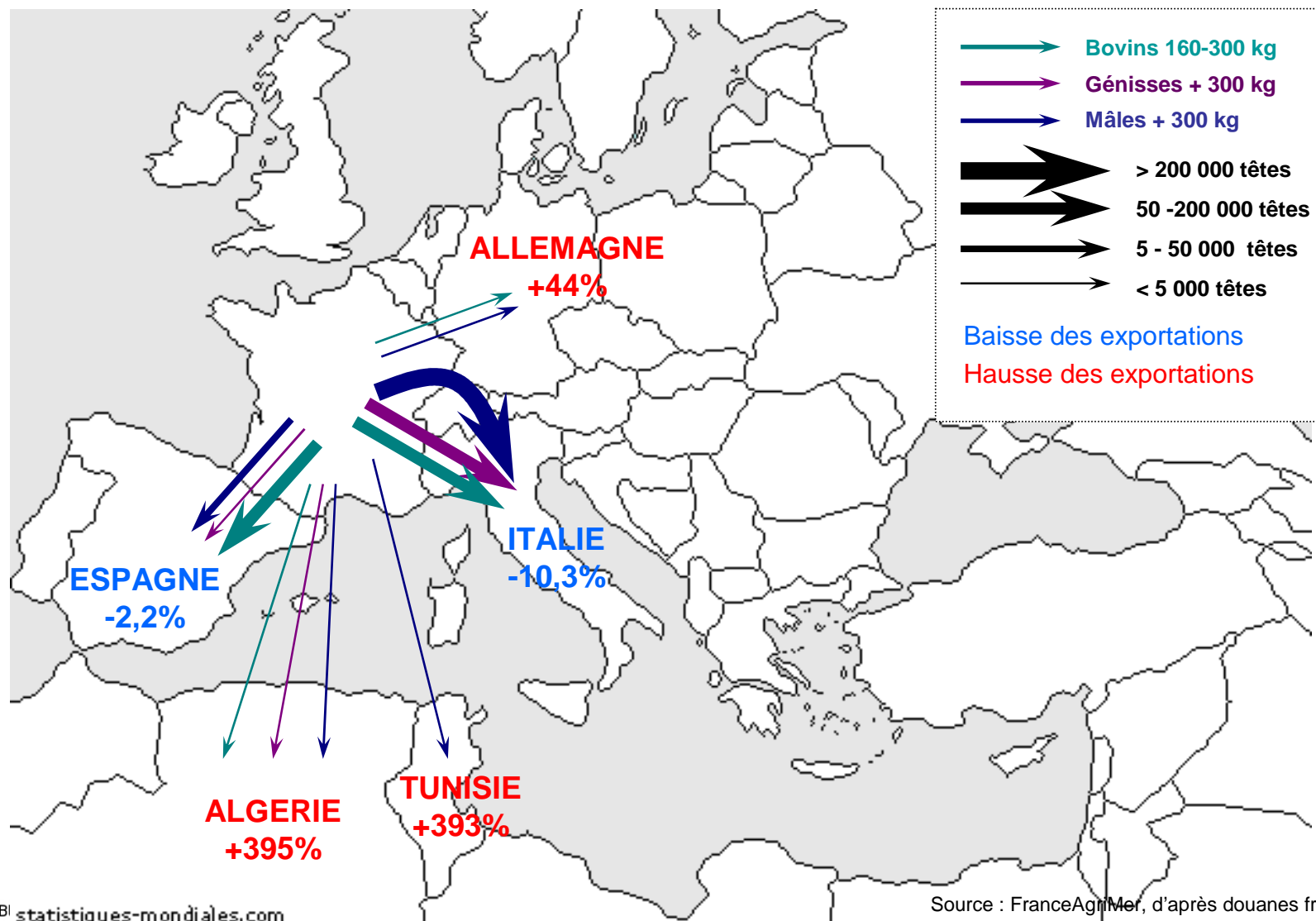
## Une offre en broutards sur une tendance décroissante



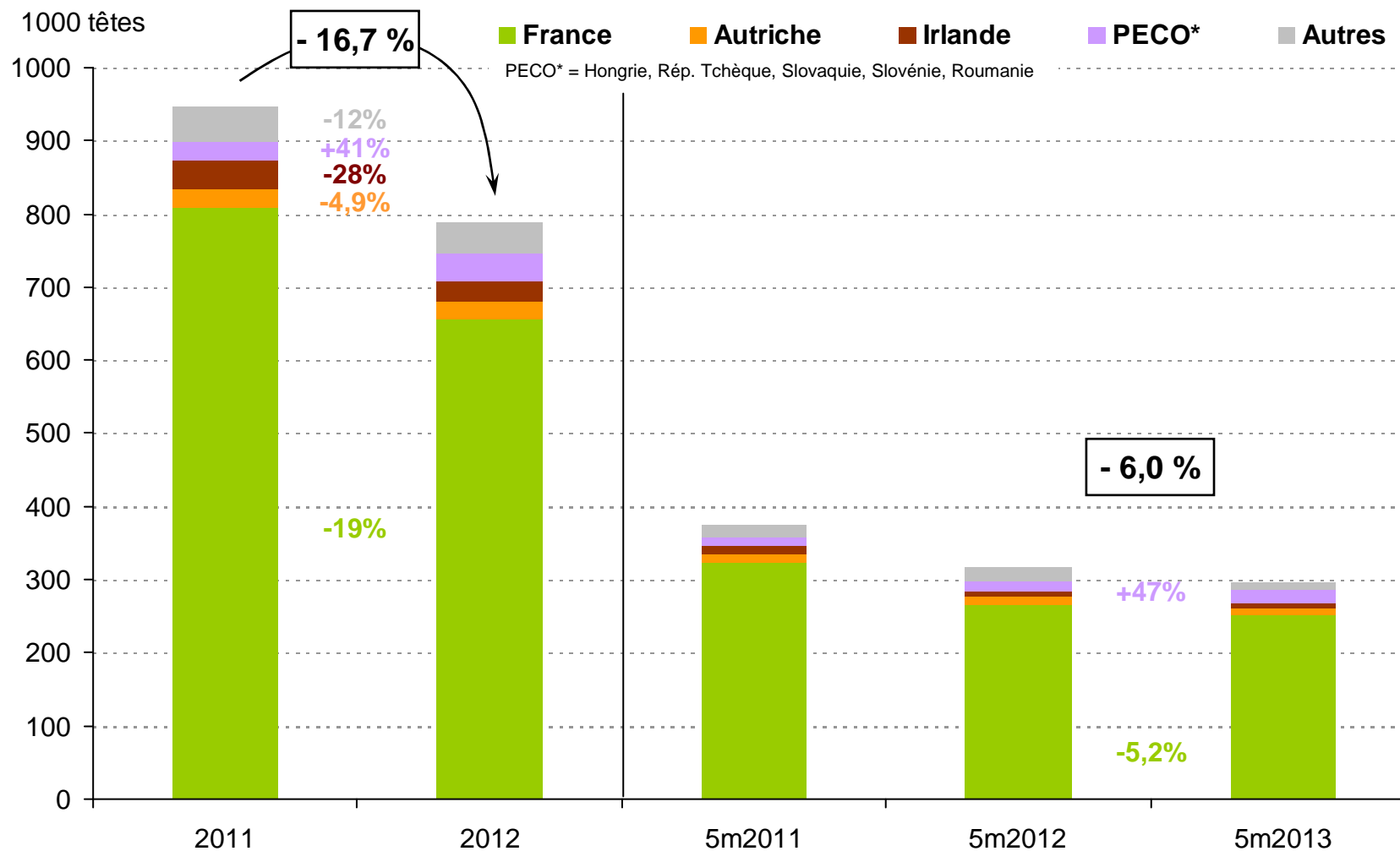
## Réduction des ventes des broutards les plus lourds



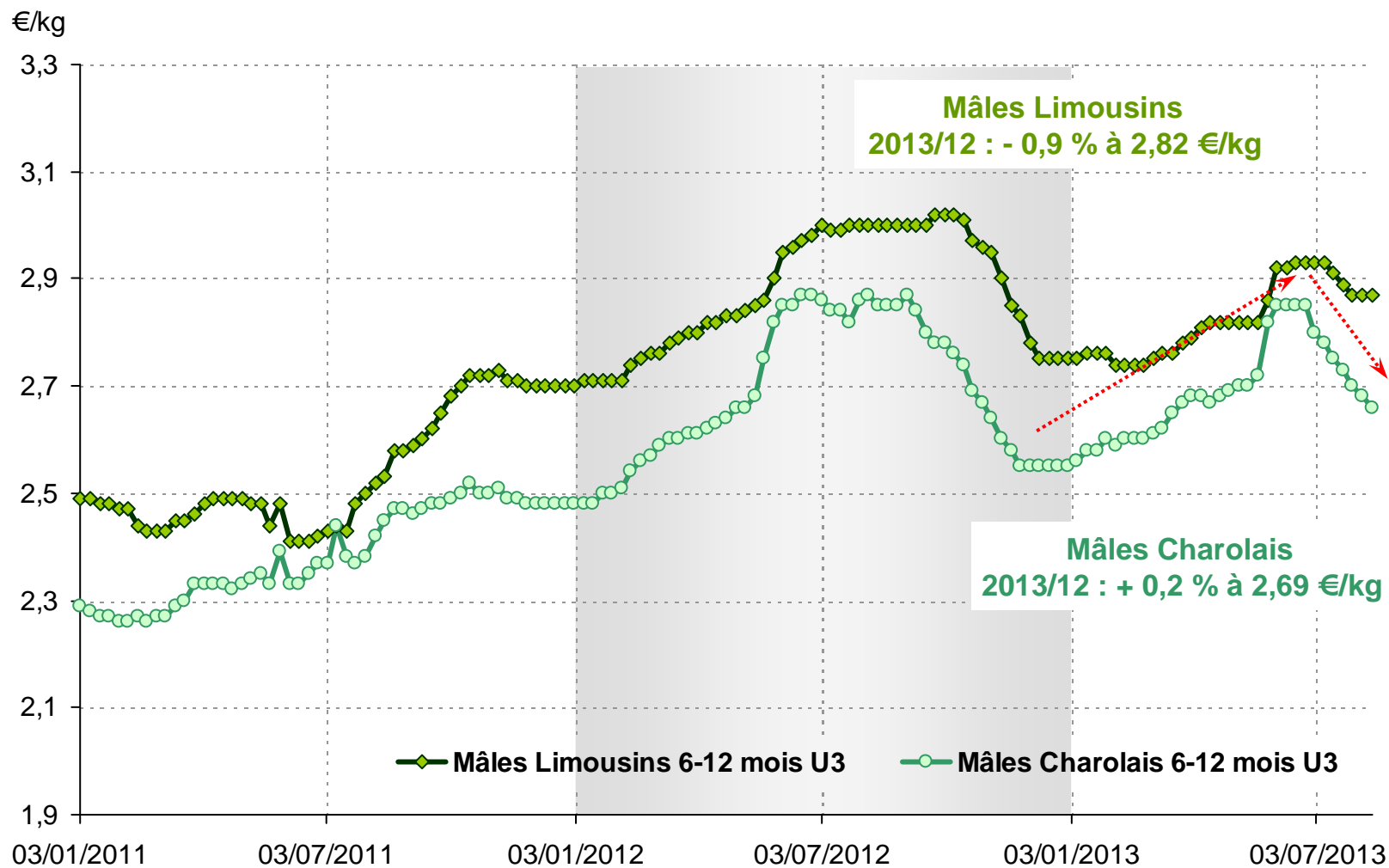
## Moins de ventes vers les deux principaux clients



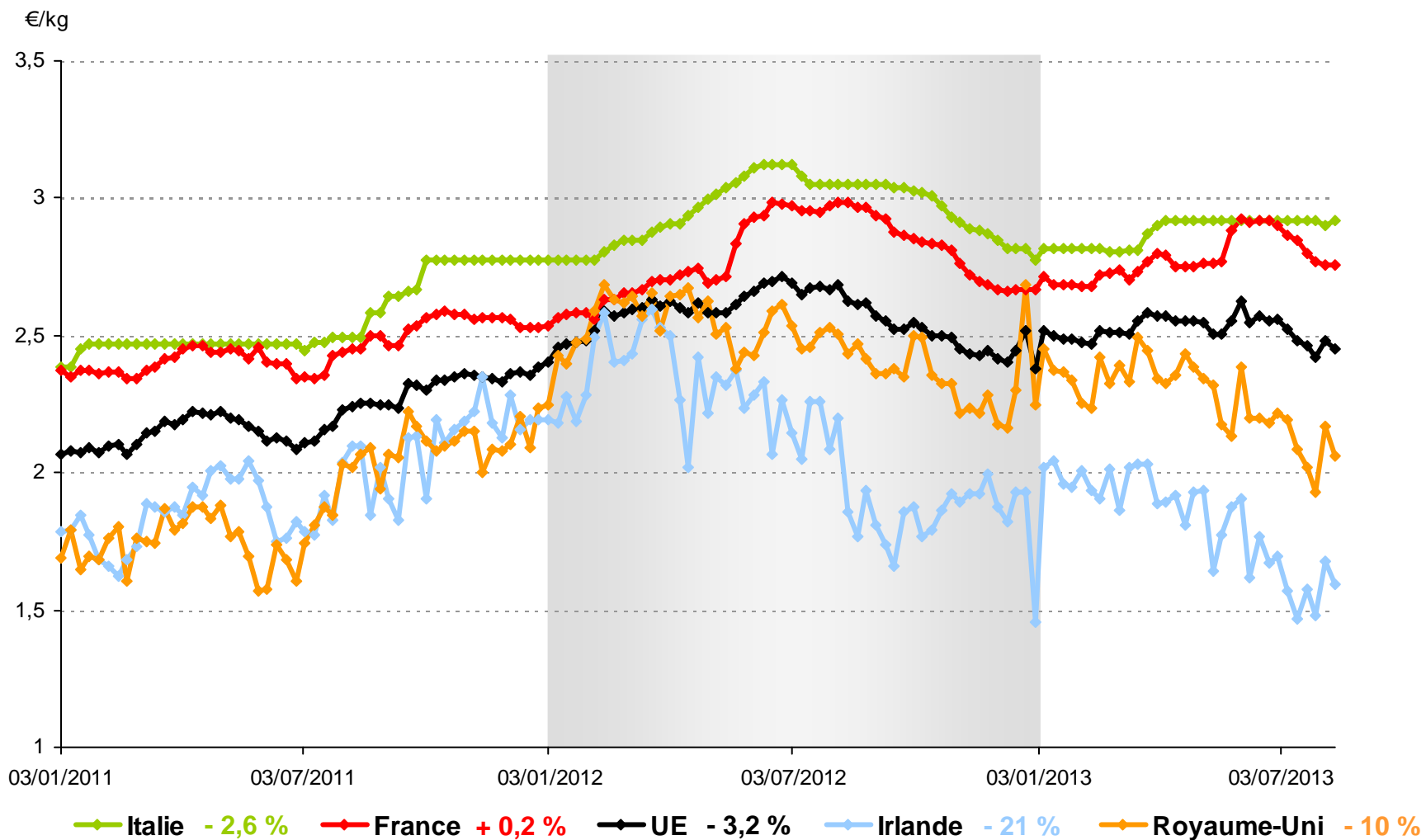
# Baisse globale des importations italiennes de broutards



## Repli des prix des broutards depuis le début de l'été



# Les broutards français toujours parmi les plus chers de l'UE

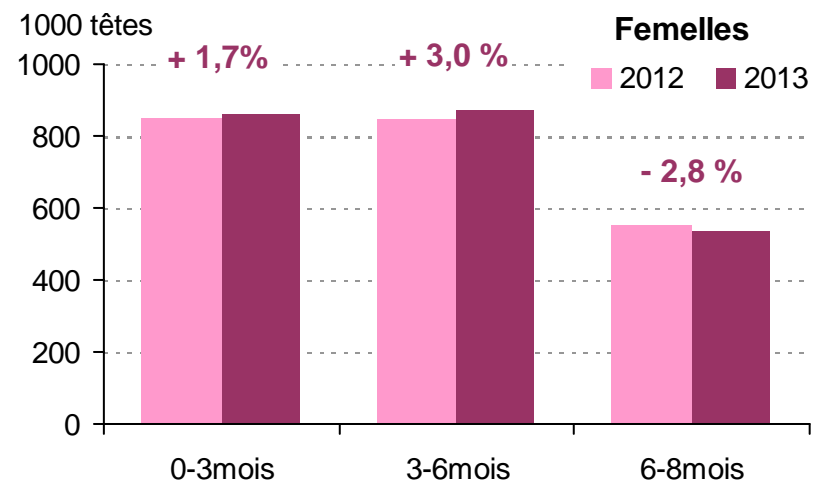
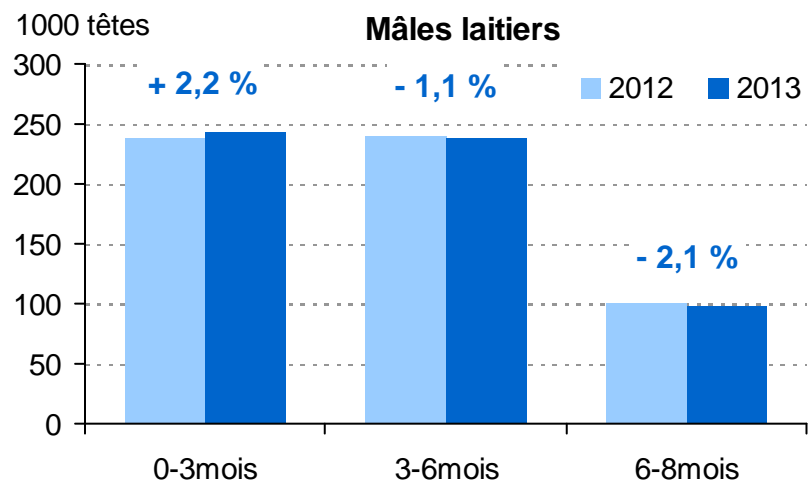
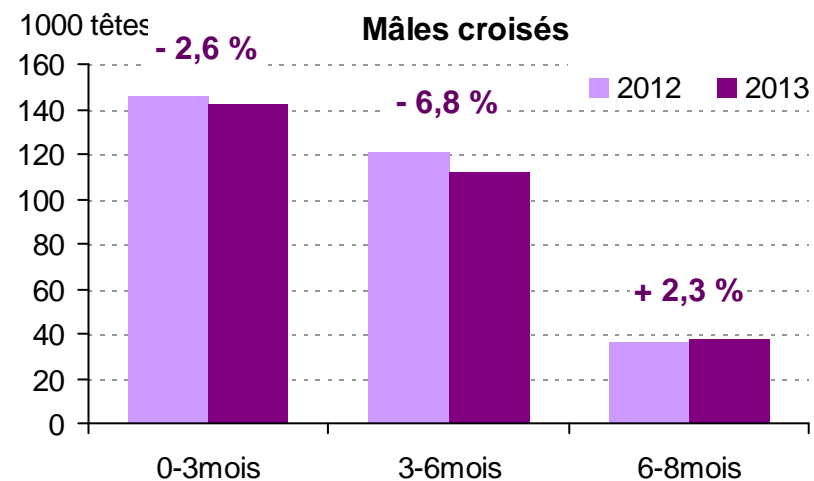
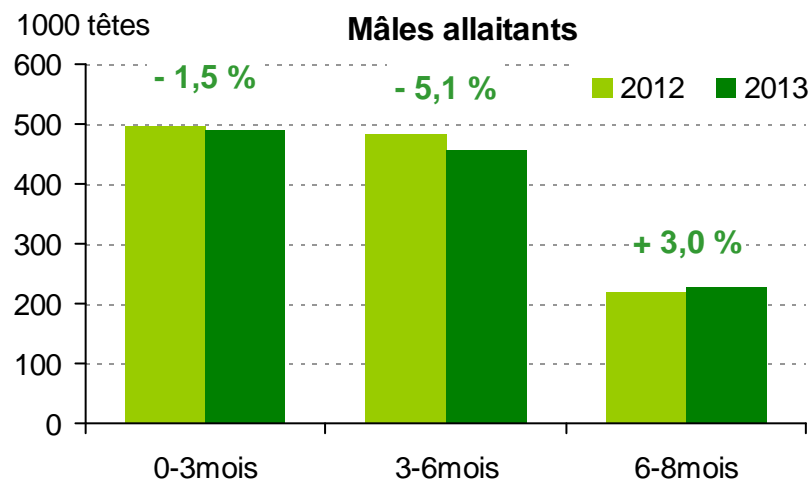


ÉTABLISSEMENT NATIONAL DES PRODUITS DE L'AGRICULTURE ET DE LA MER

Source : FranceAgriMer, d'après Commission européenne



## Disponibilités en bovins de moins de 8 mois au 1<sup>er</sup> juin

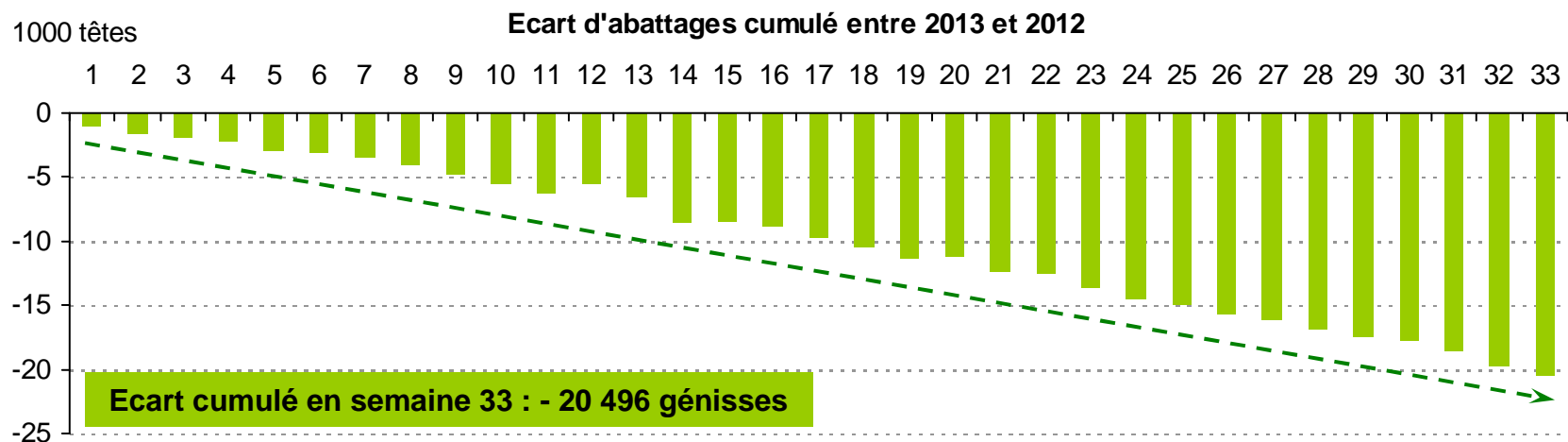
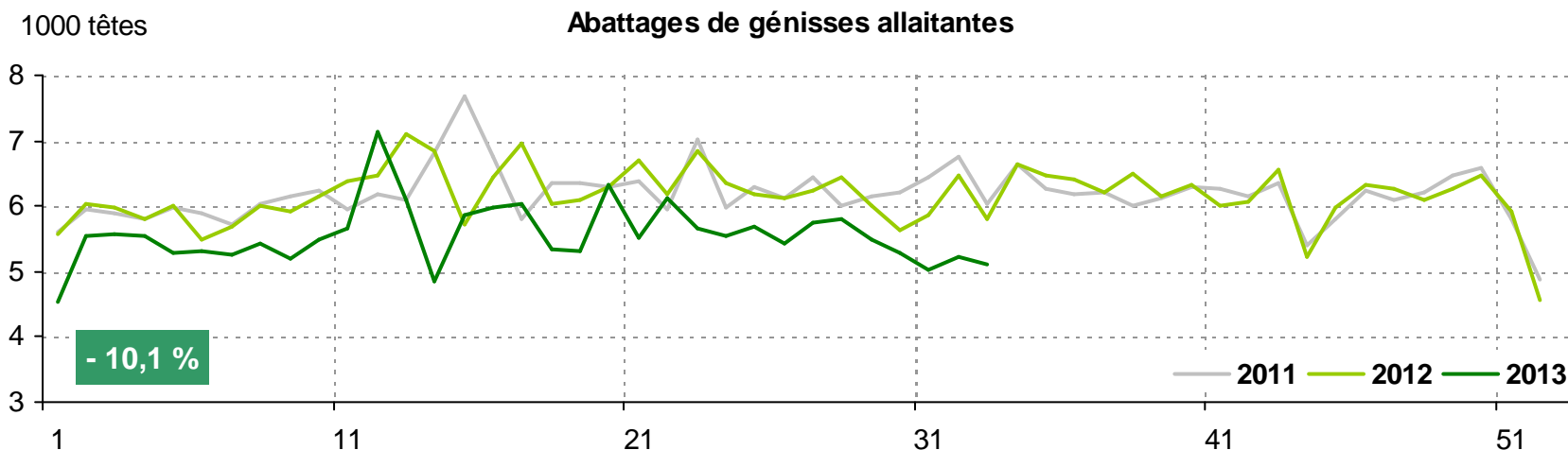




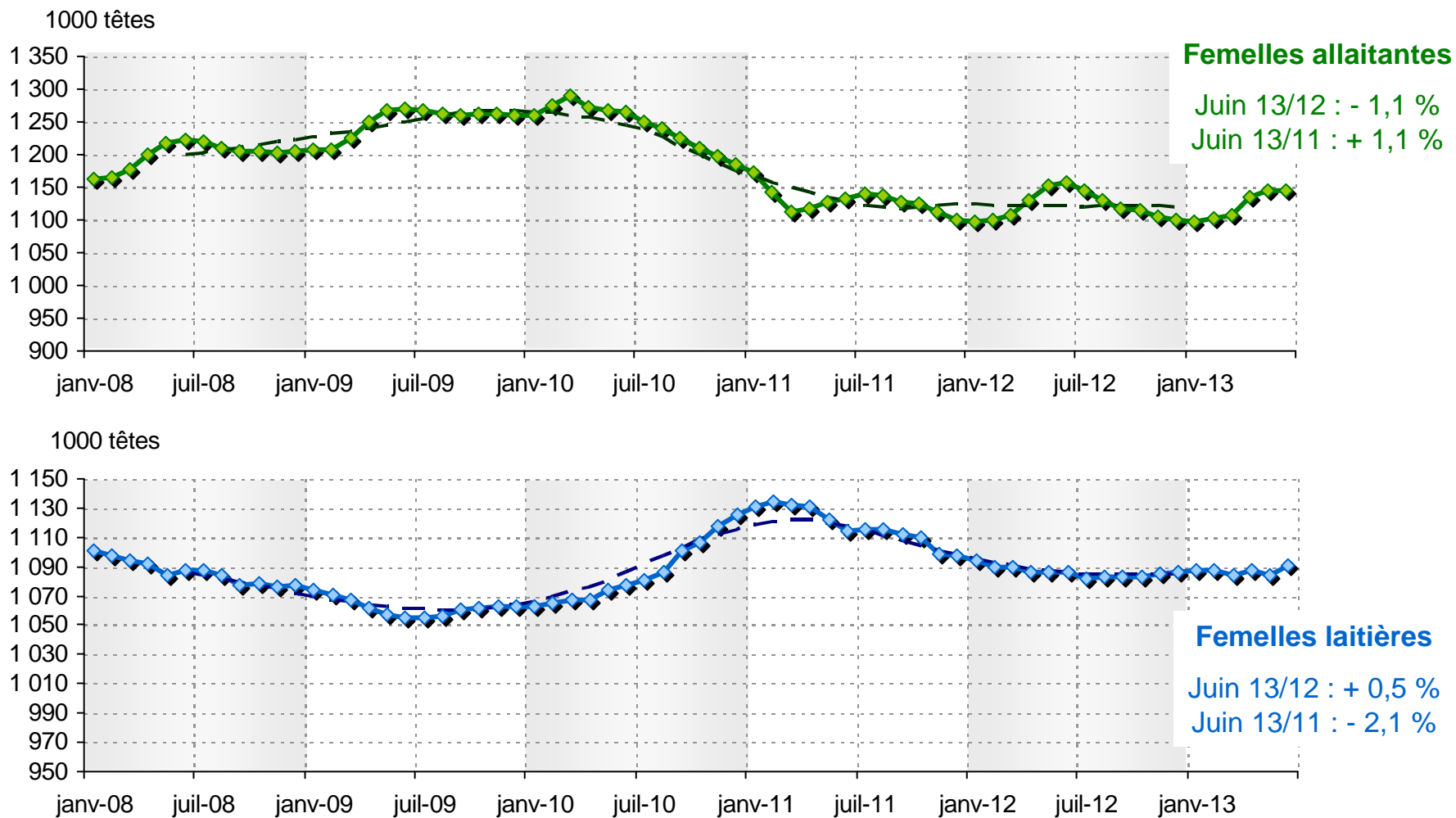
# Marché des bovins finis



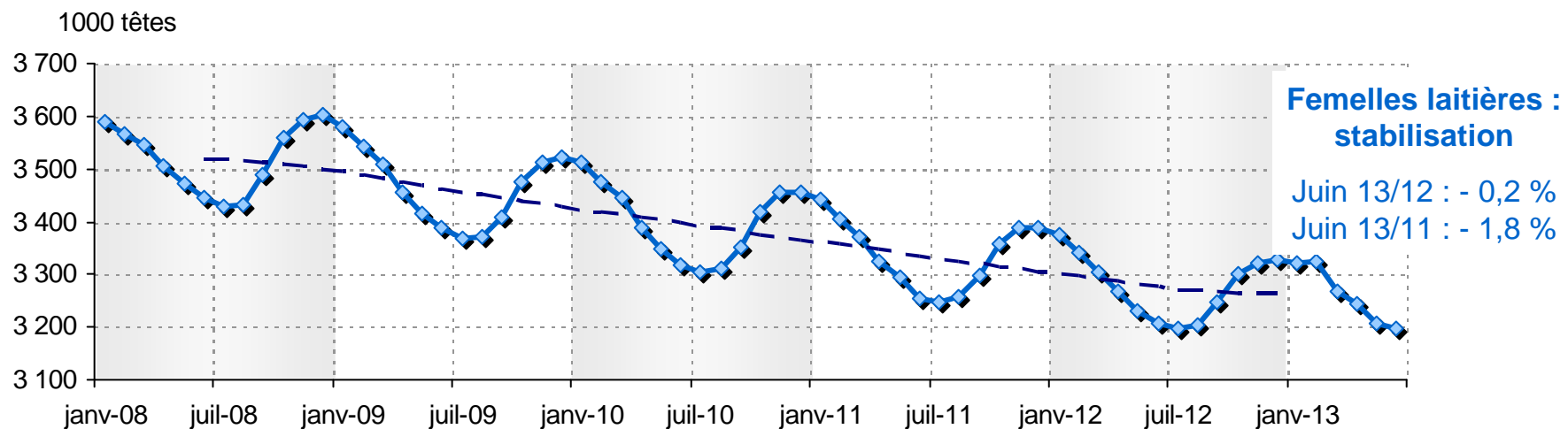
# Net repli des abattages de génisses...



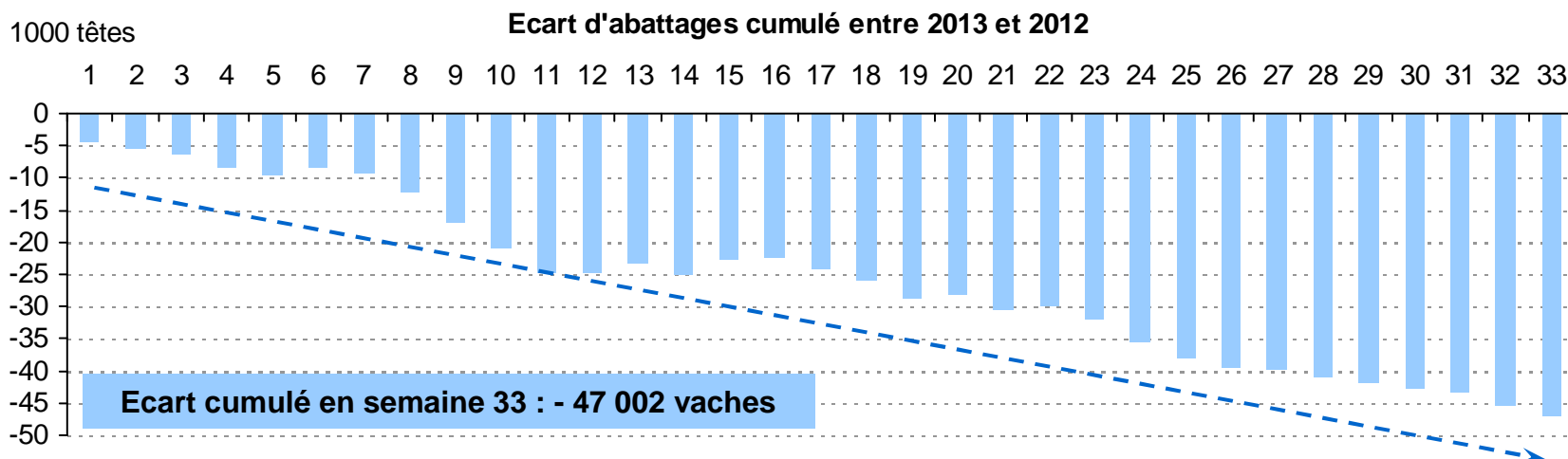
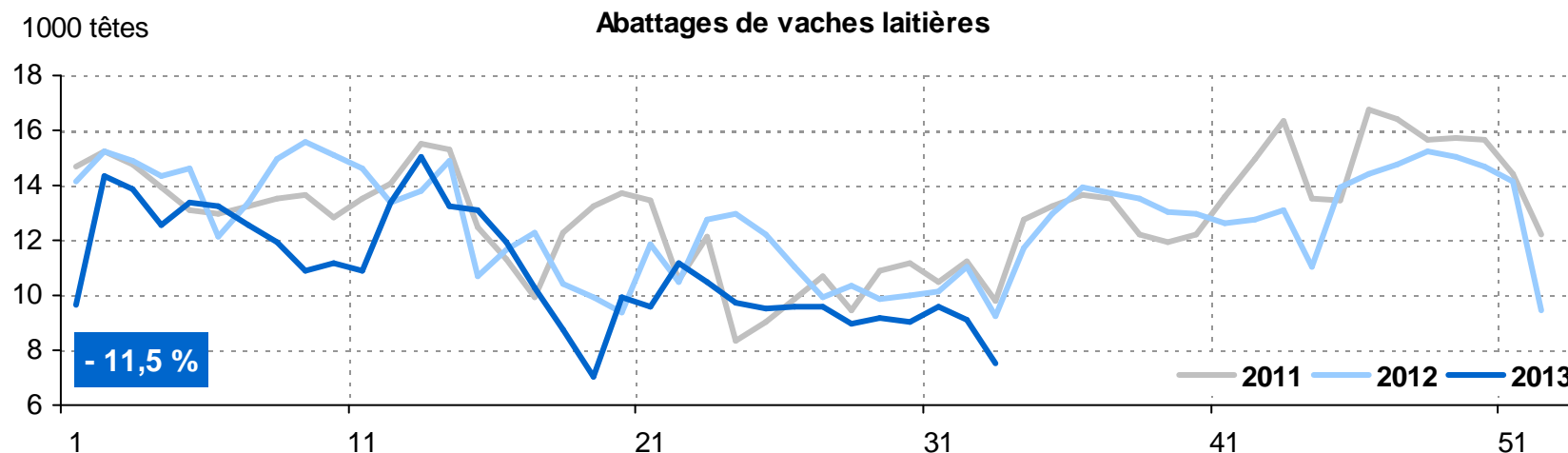
## ... d'où une stabilisation du cheptel de femelles de 24-36 mois



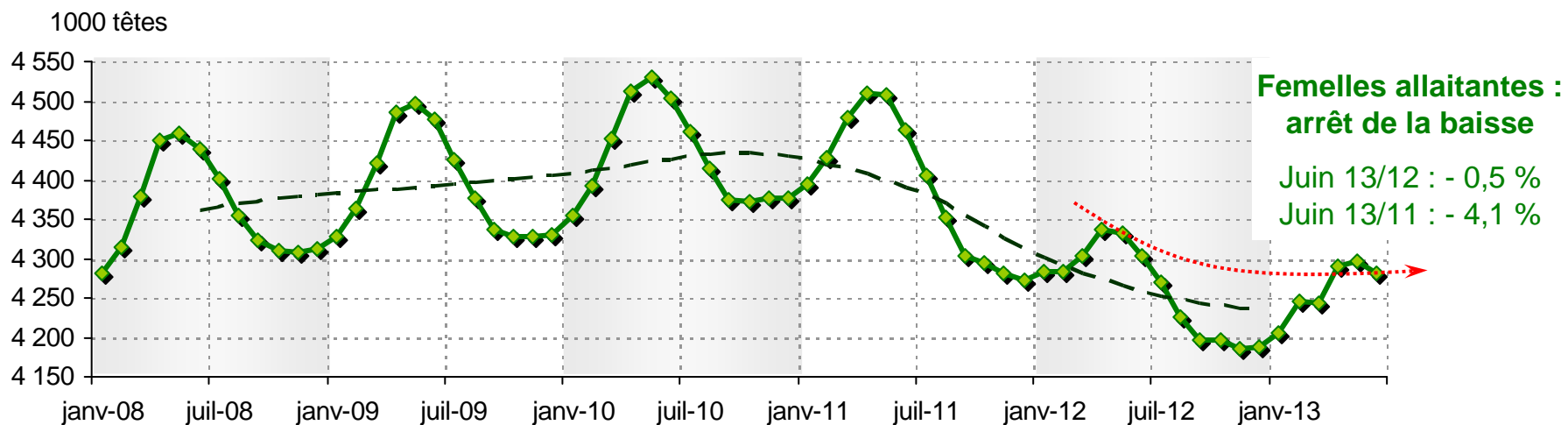
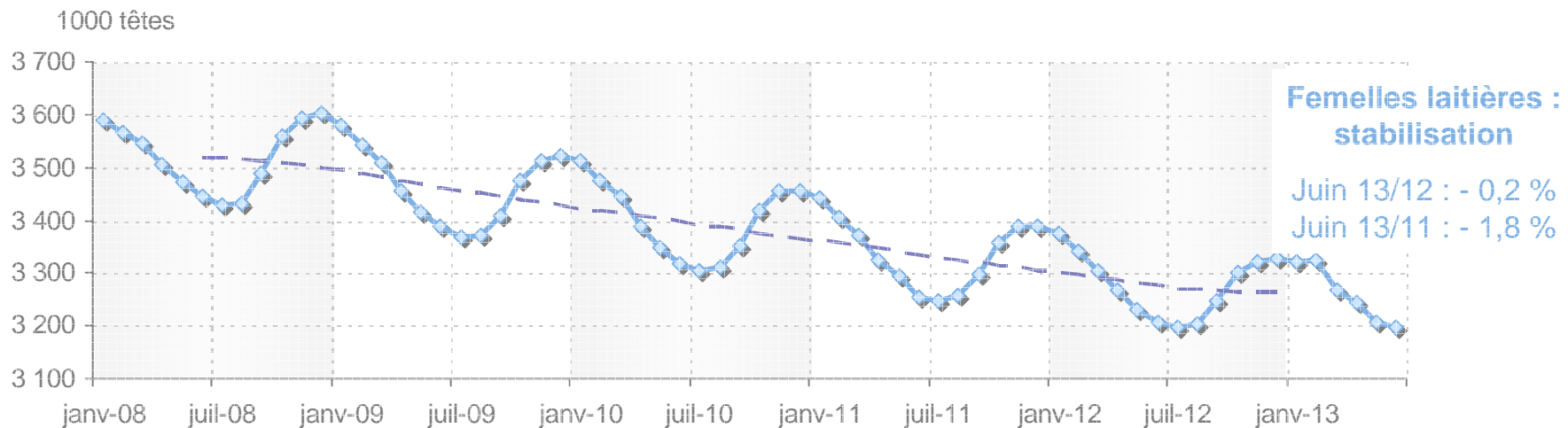
## Evolution du cheptel de femelles de plus de 36 mois



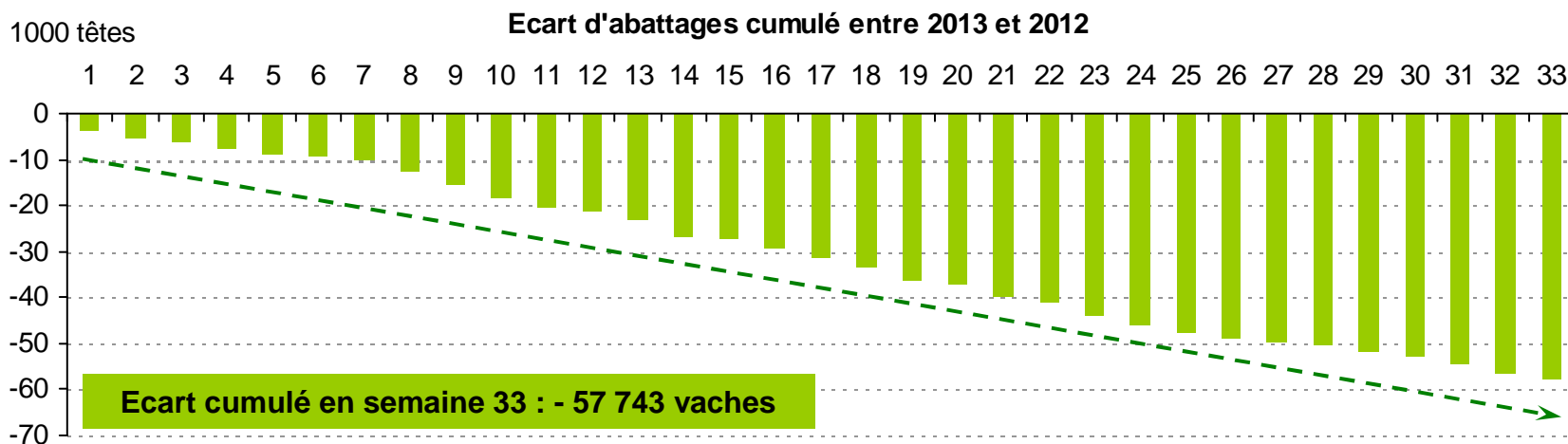
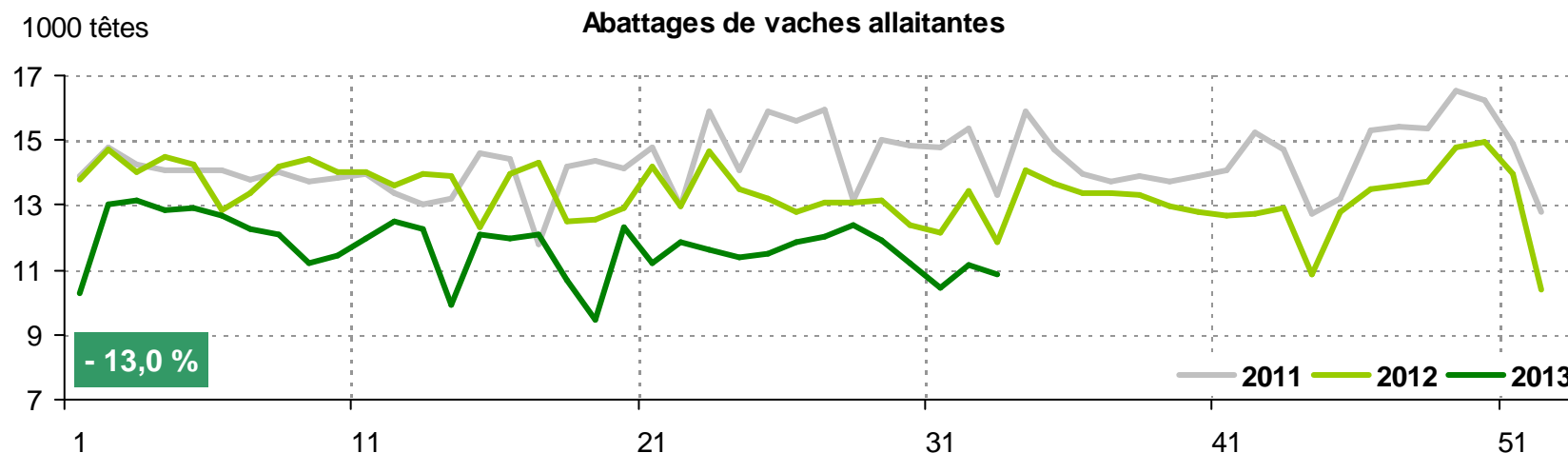
# Abattages de vaches laitières : tendance à la baisse confirmée



# Evolution du cheptel de femelles de plus de 36 mois

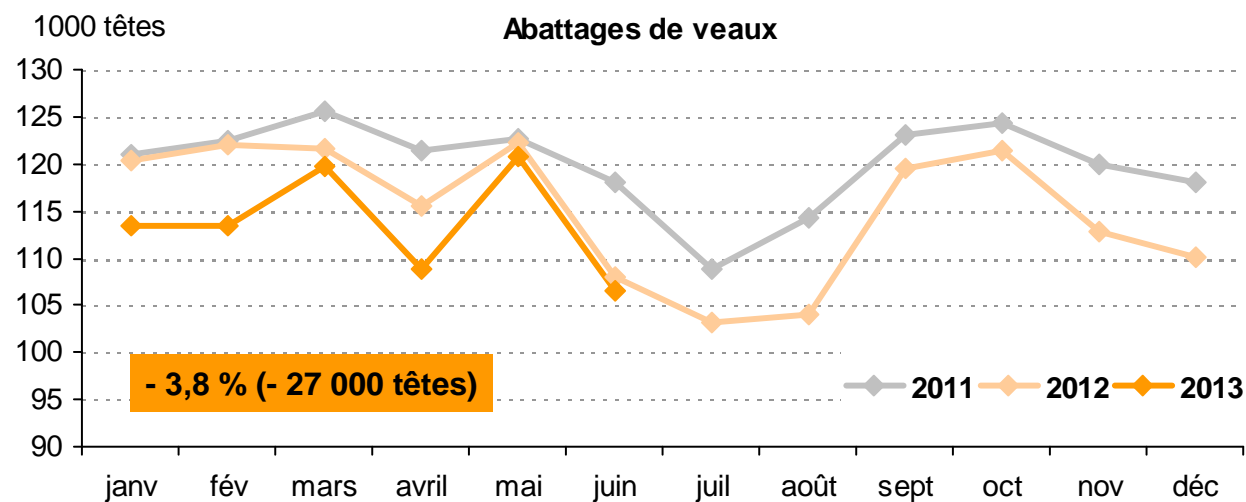
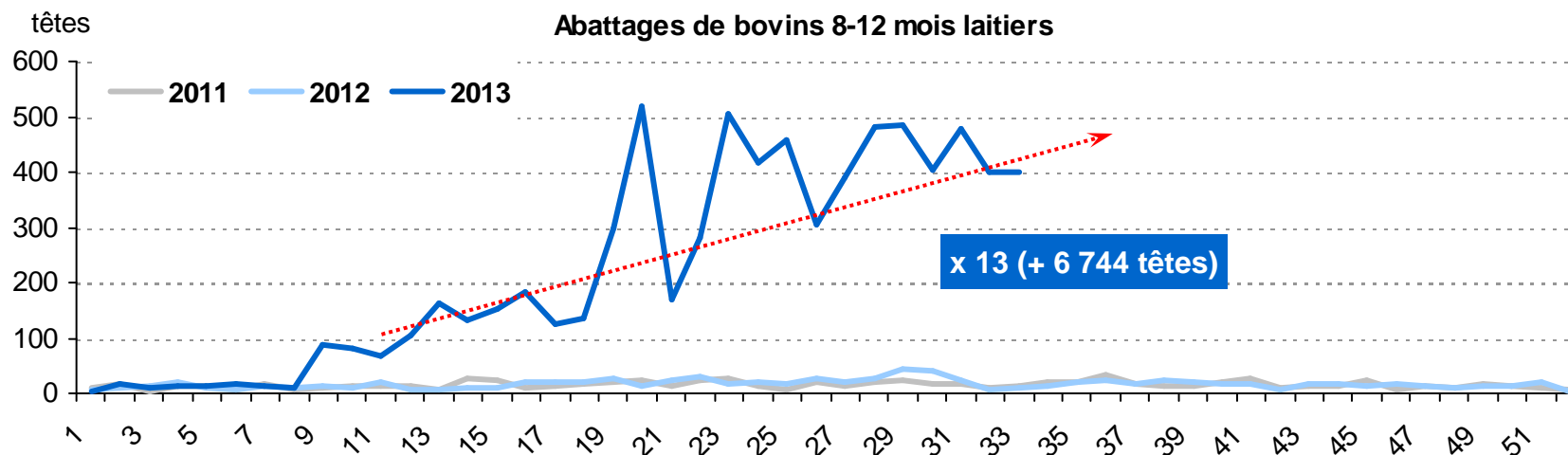


# Abattages de vaches allaitantes : nette chute également





# Nouveau : des abattages de bovins laitiers 8-12 mois

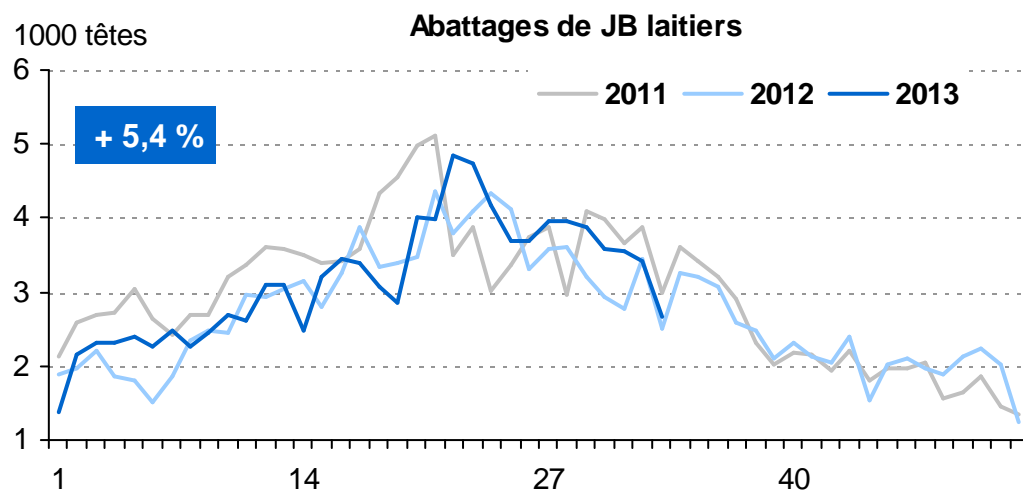
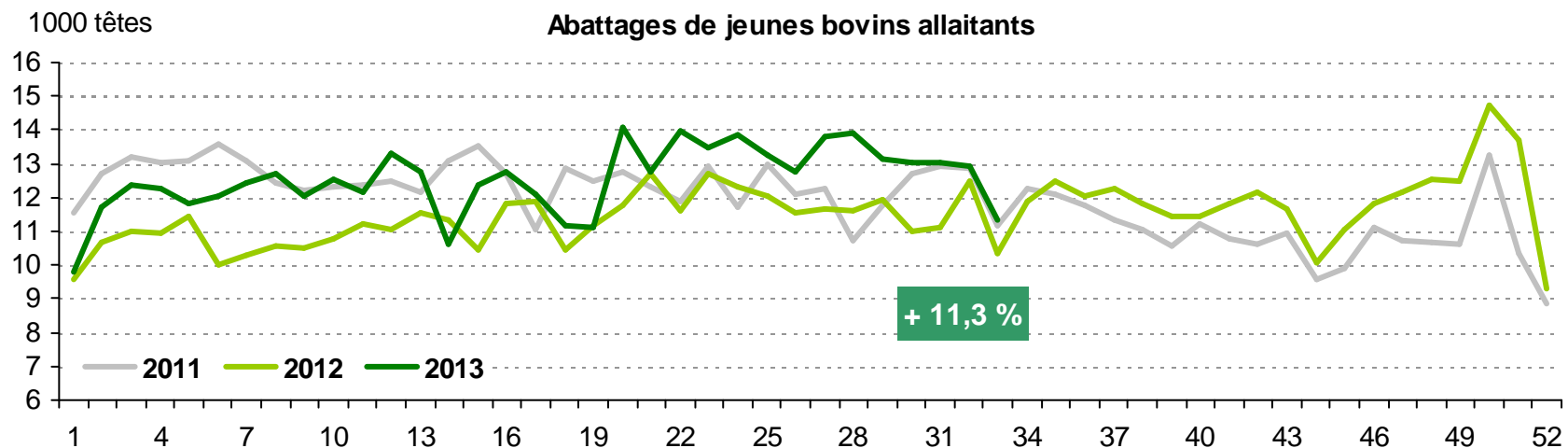


**Repli des abattages de veaux de boucherie**

⇒ Report de veaux laitiers sur la filière « semi-longue »

⇒ Hausse des abattages de bovins 8-12 mois laitiers

# Croissance des abattages de jeunes bovins...

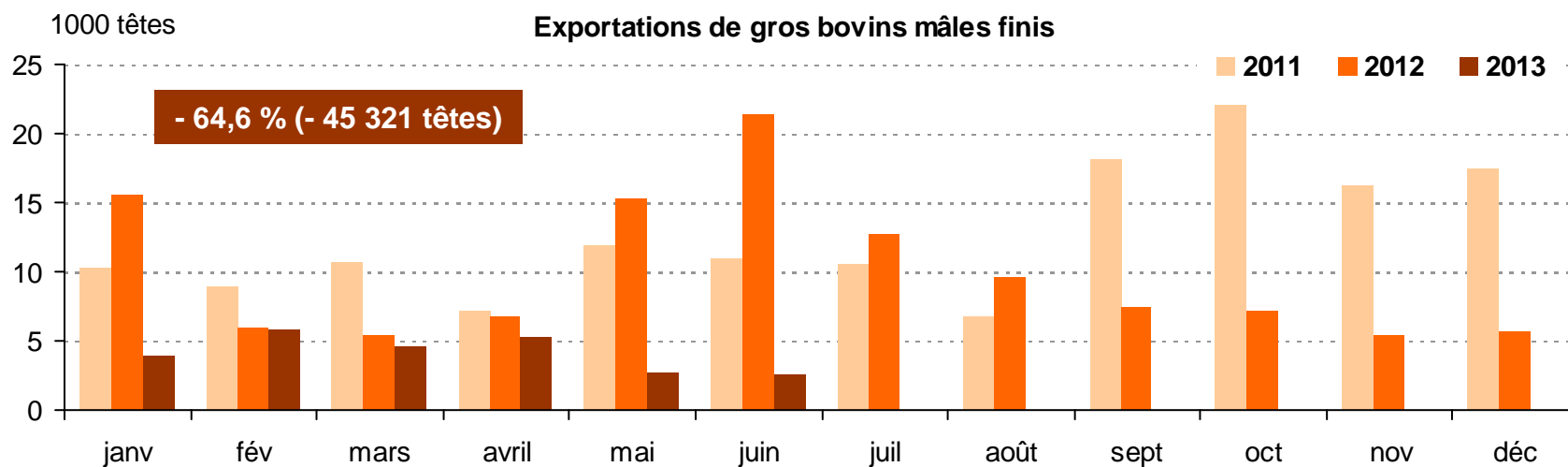
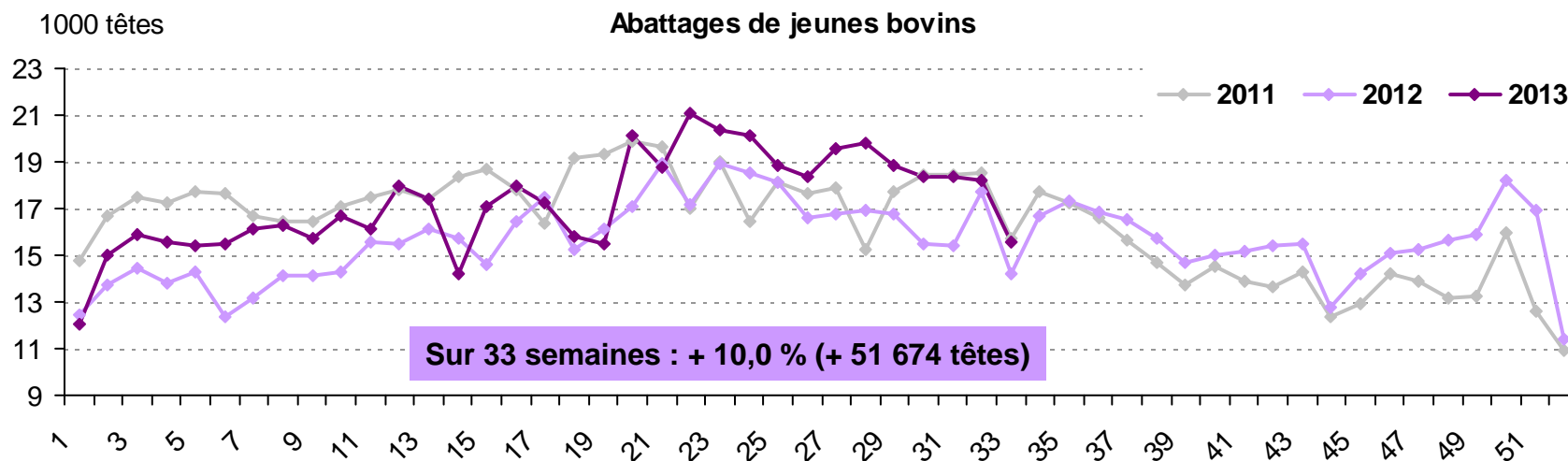


**Alourdissement des carcasses de JB allaitants : + 2,06 kg/tête**

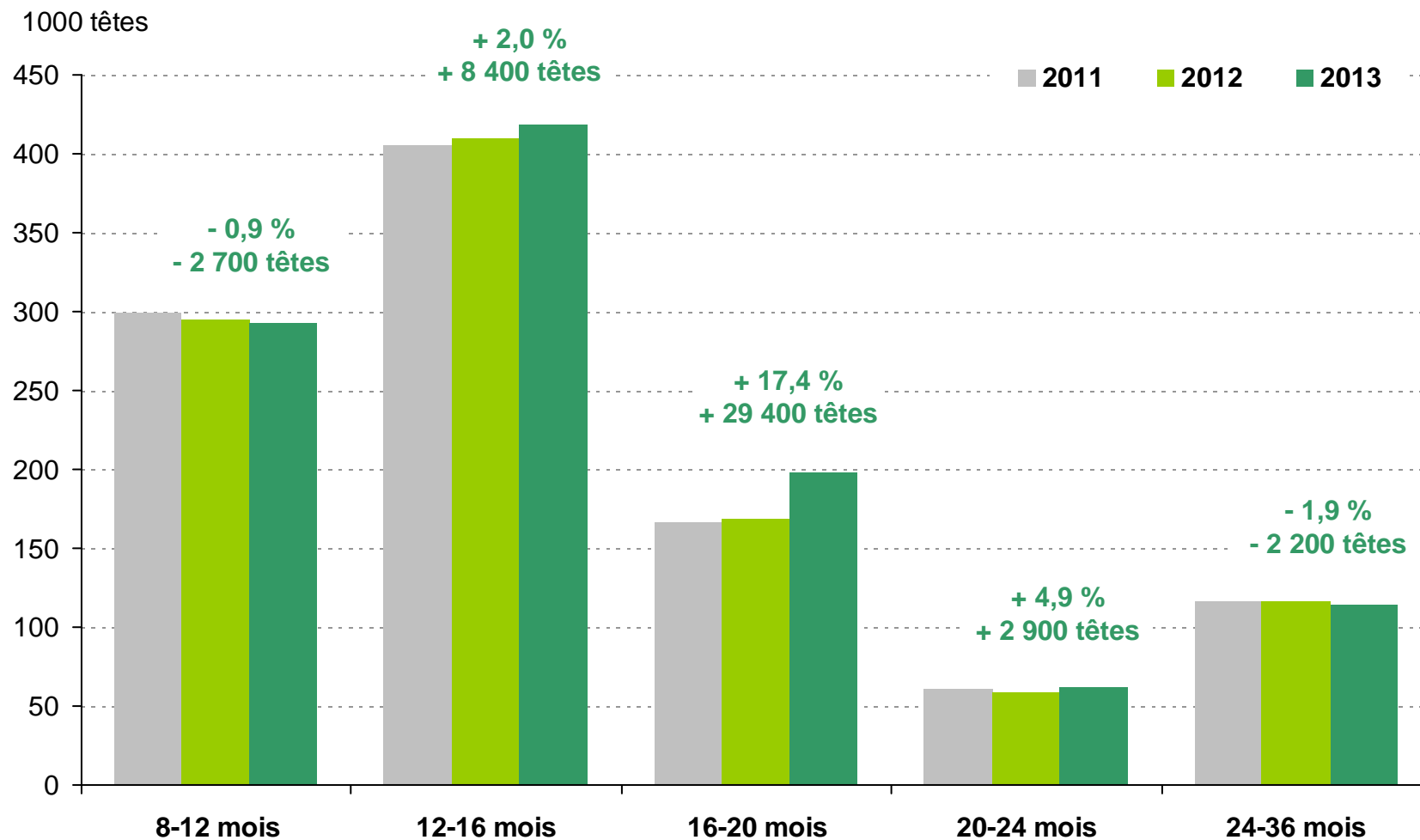
**Réduction des poids de carcasses de JB laitiers : - 0,92 kg/tête**

(moyenne sur 33 semaines 2013/12)

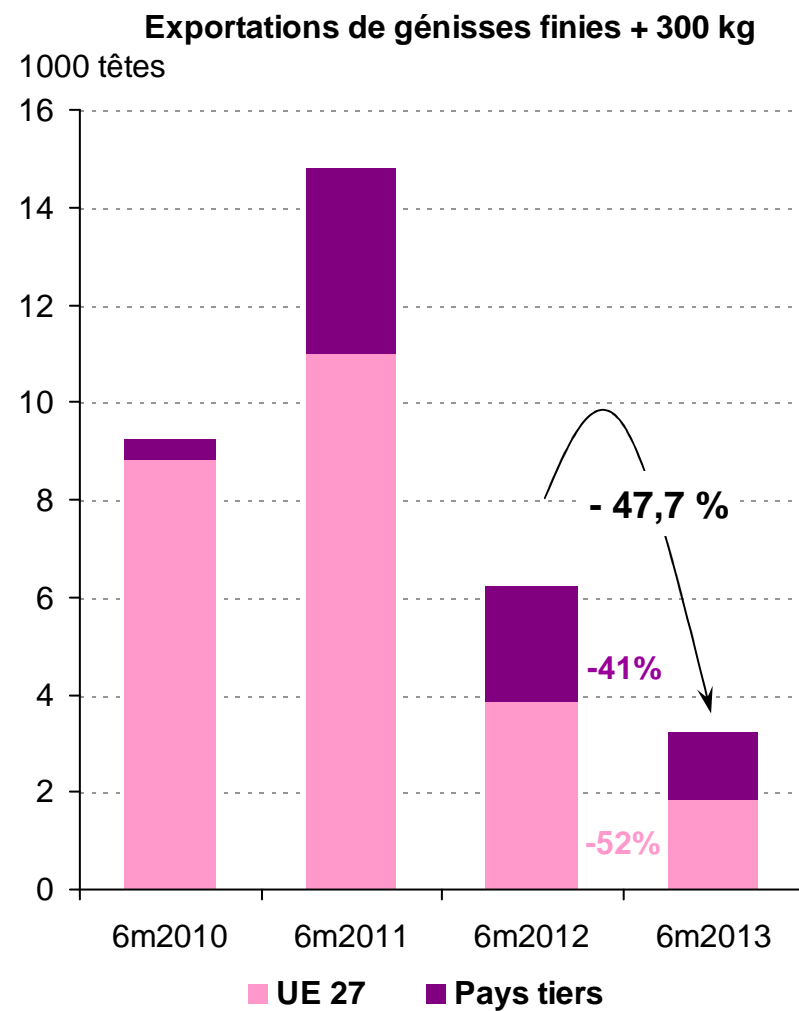
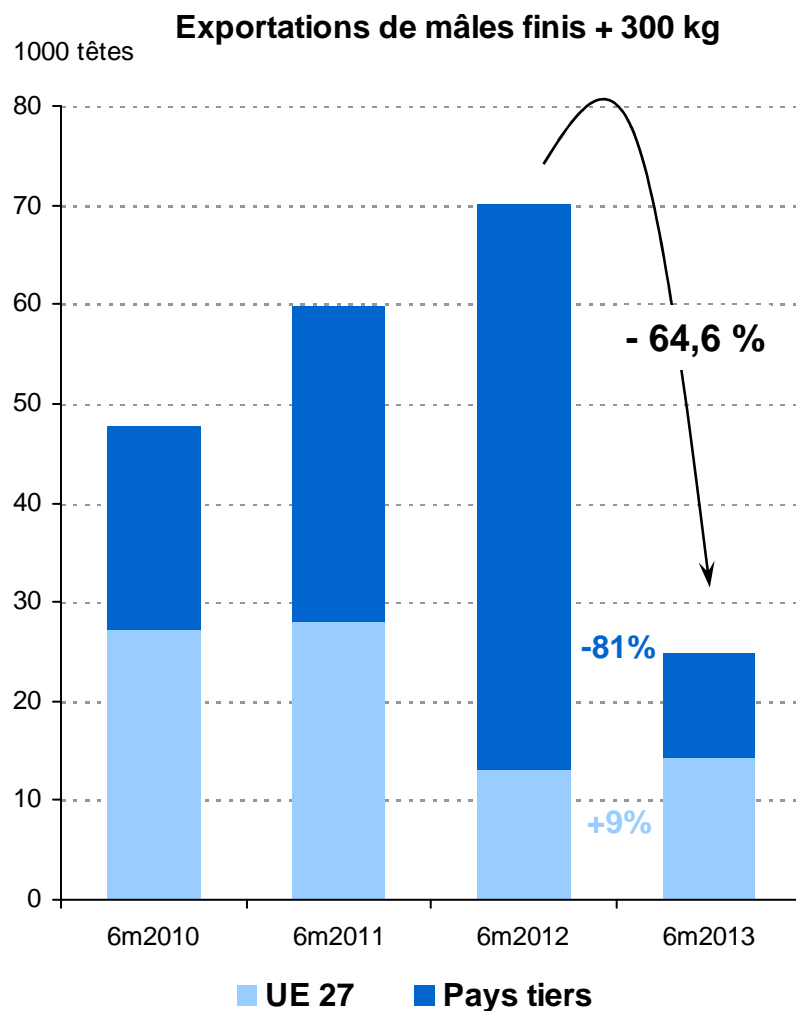
## ... conséquence de la baisse des exportations de bovins finis



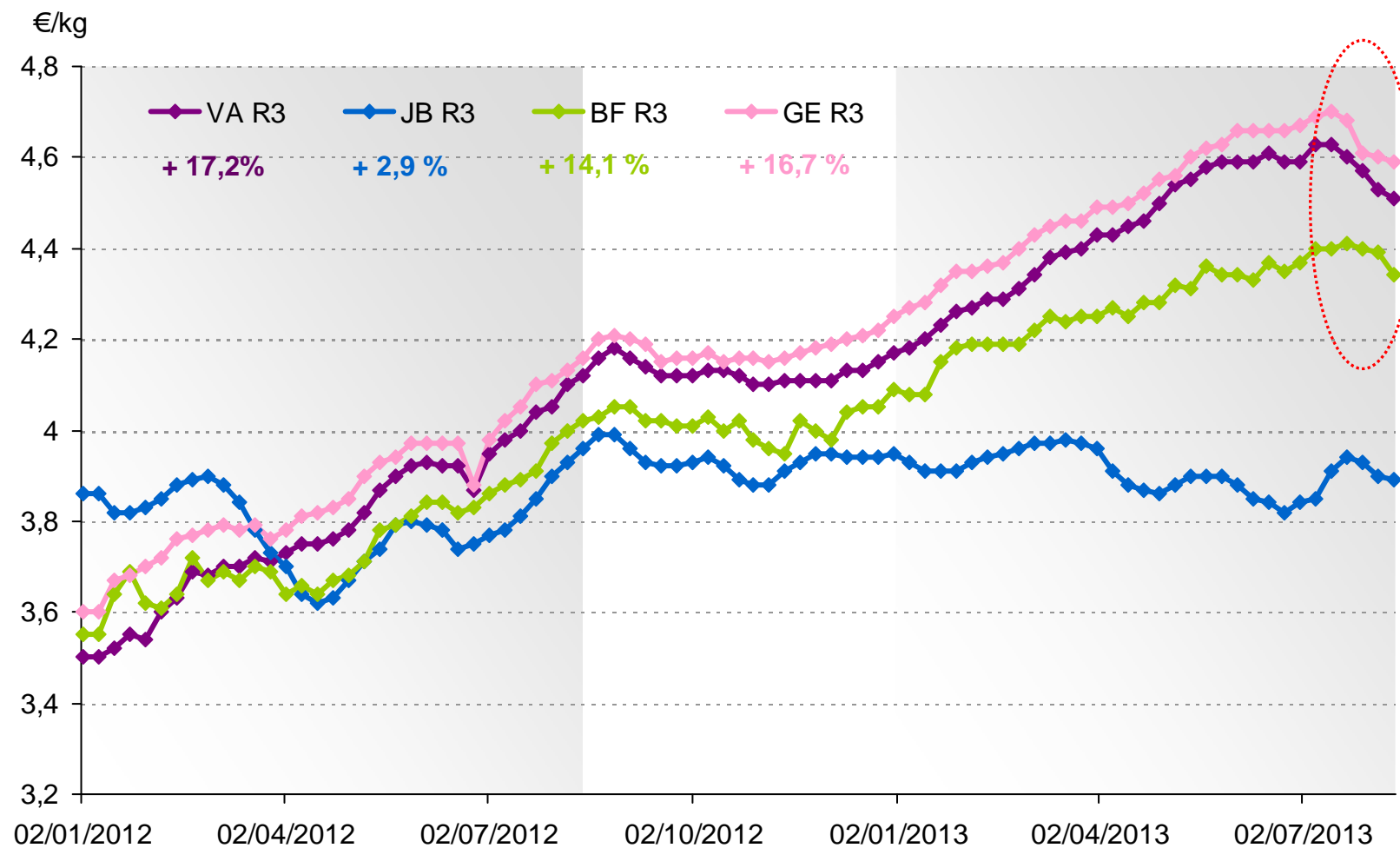
## Disponibilités en mâles allaitants au 1<sup>er</sup> juin



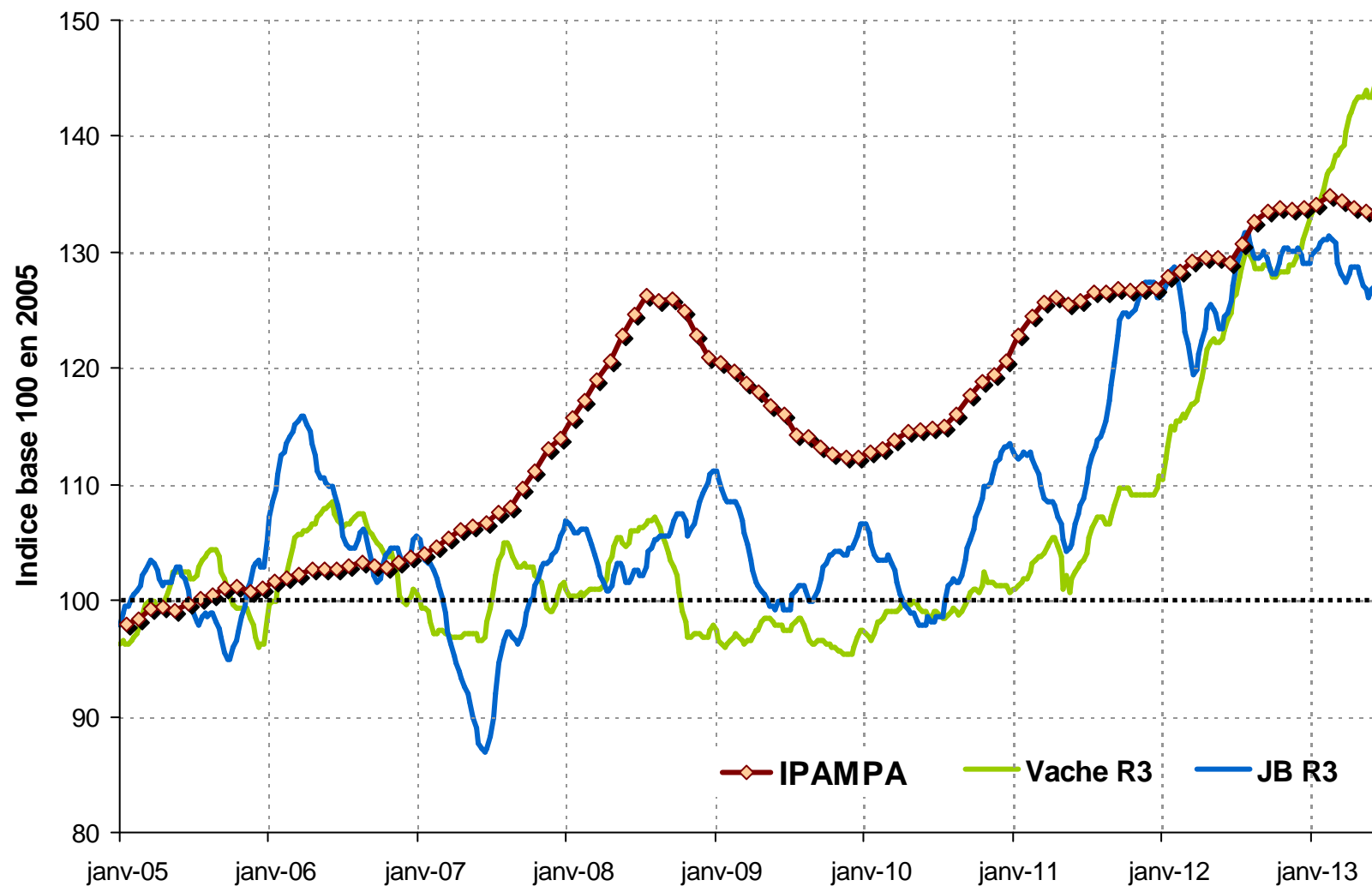
# Ralentissement des exportations de tous les gros bovins finis



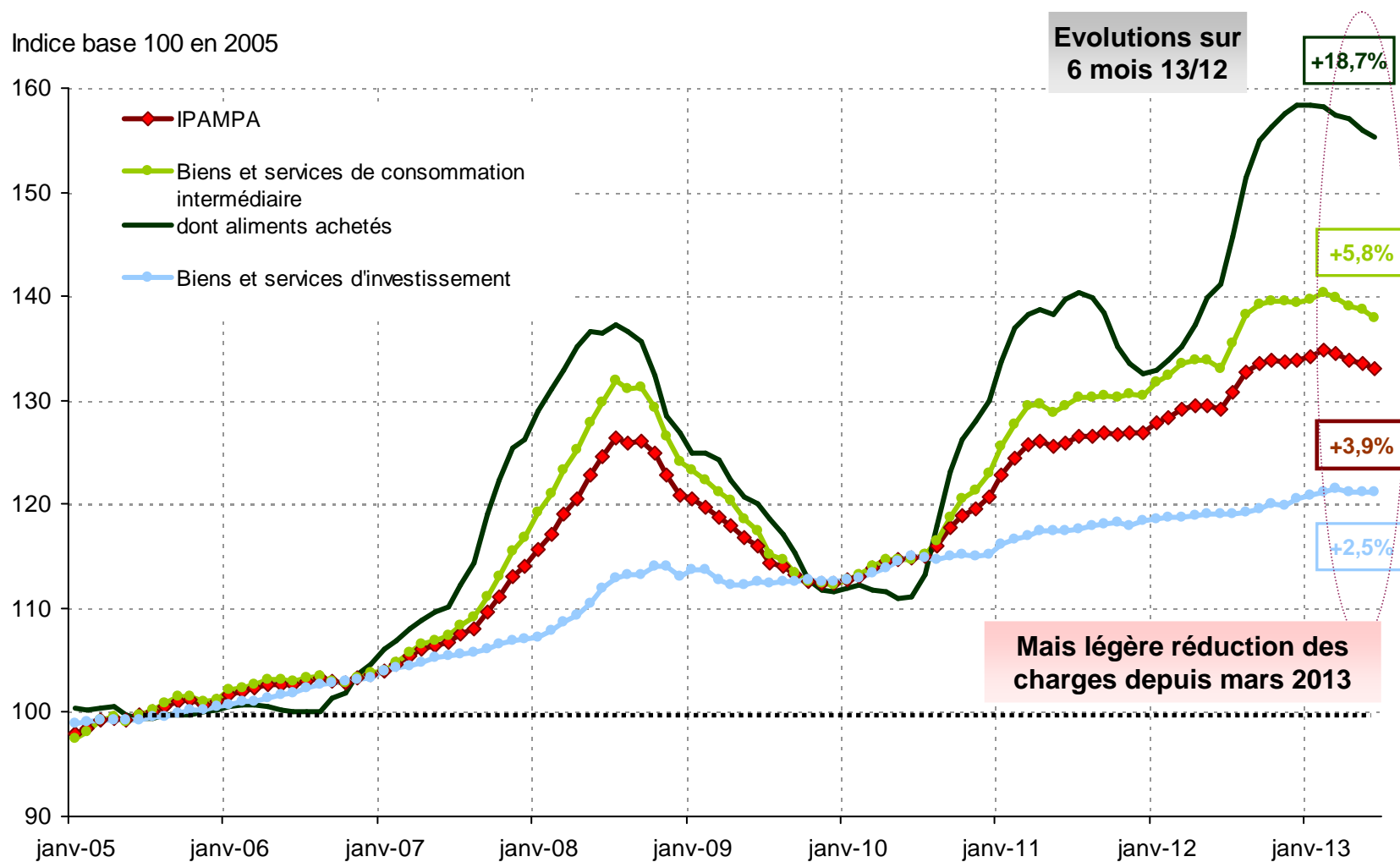
## Amorce de baisse pour les prix des gros bovins en France



## Comparaison en indice : IPAMPA / prix JBR3 et vache R3

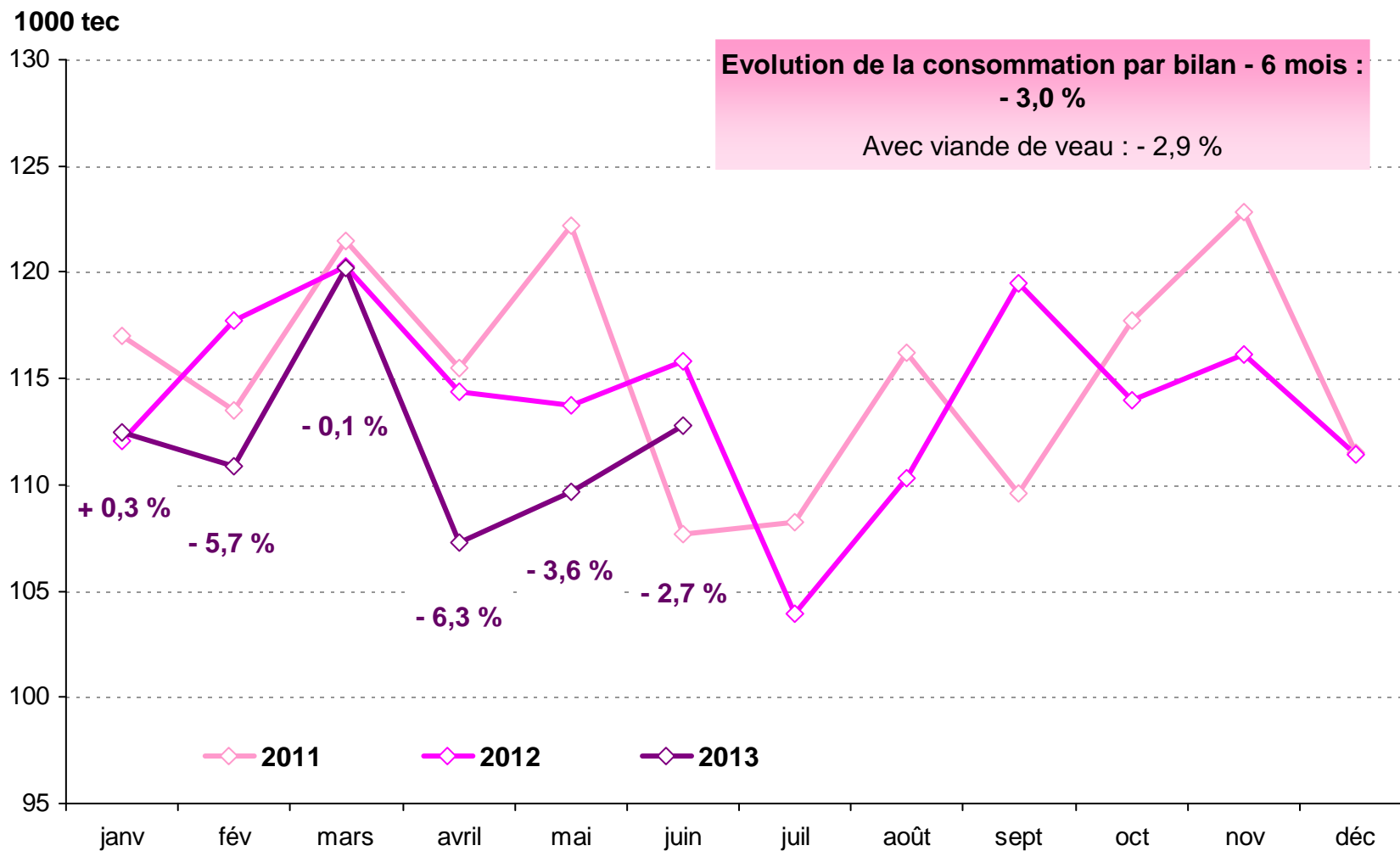


# IPAMPA Viande bovine : détail des principales charges



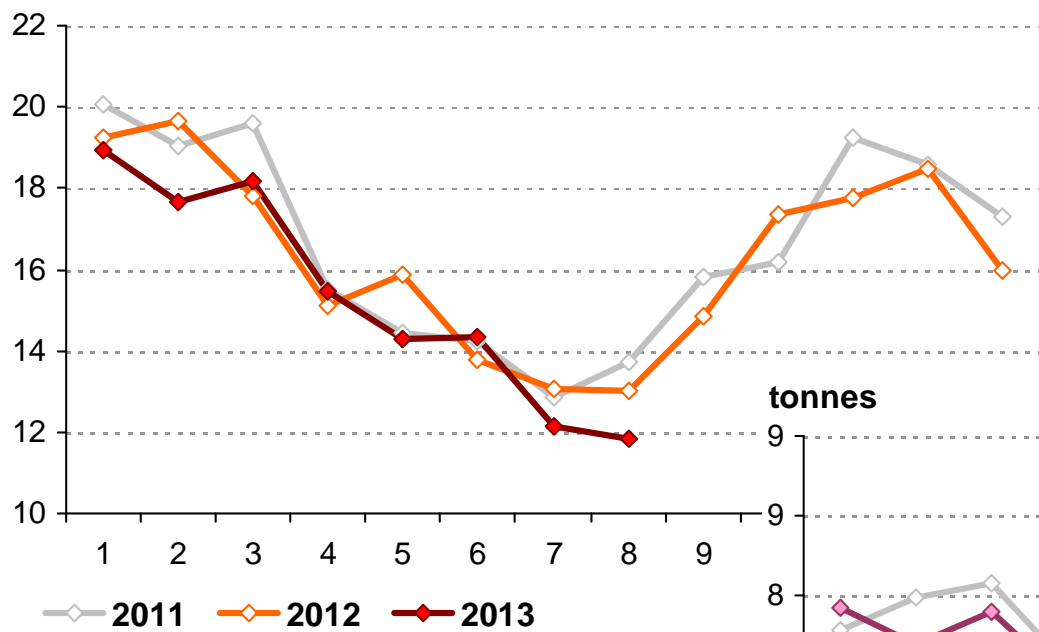


# Toujours des niveaux bas de consommation



# Achat des ménages : la viande hachée s'en sort un peu mieux

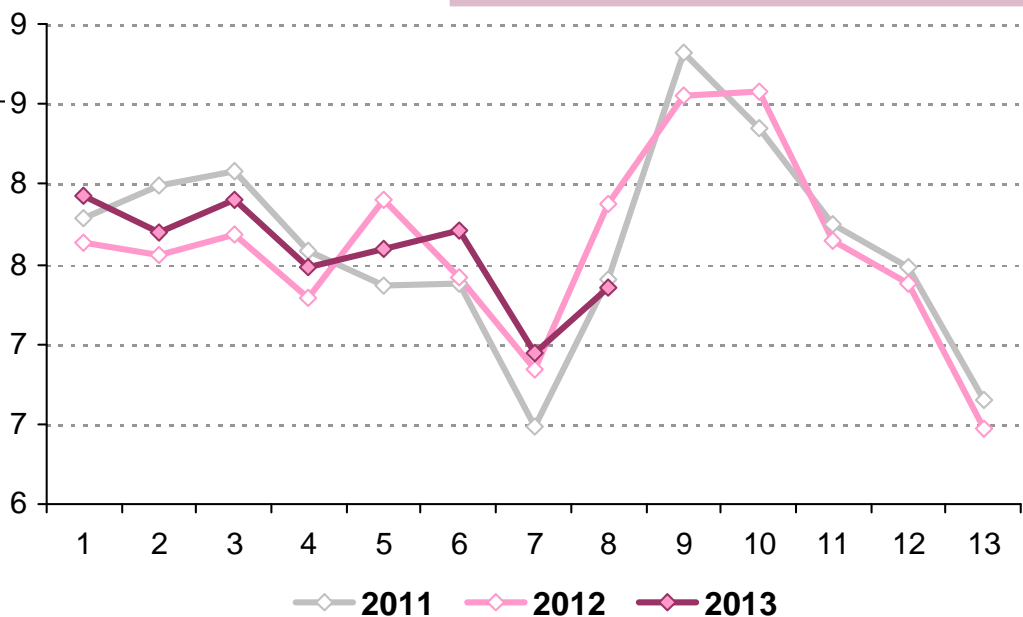
tonnes



**Bœuf**  
8P 13/12 : - 3,7 % ; 8P 13/11 : - 5,1 %

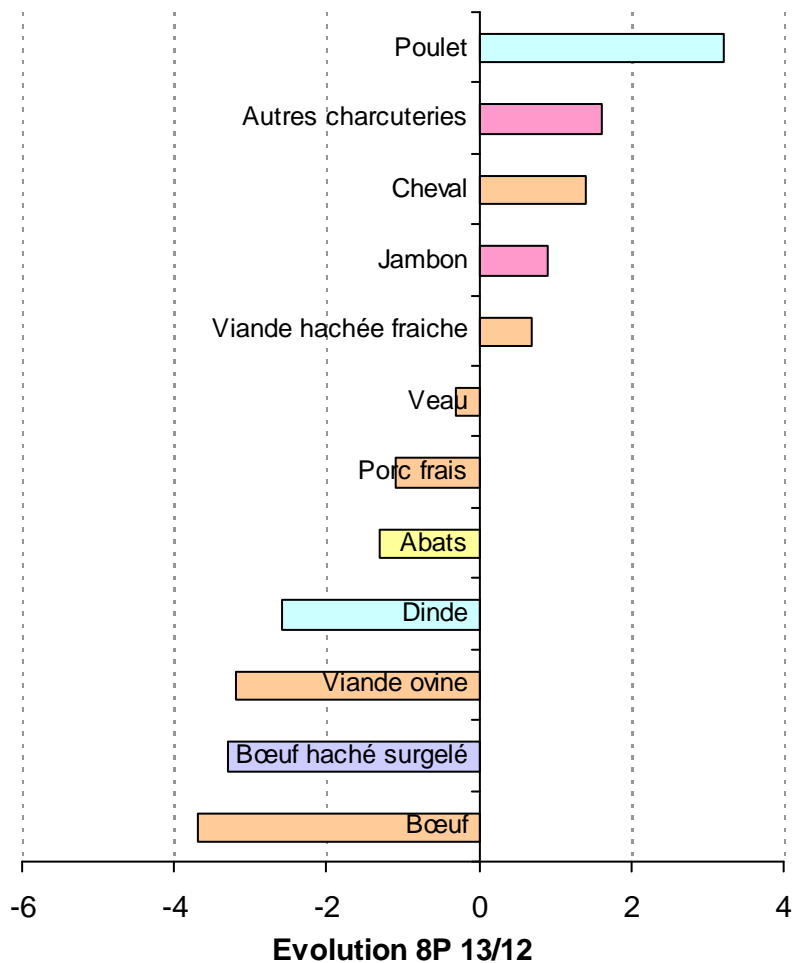
**Viande hachée fraîche**  
8P 13/12 : + 0,7 % ; 8P 13/11 : + 0,9 %

tonnes

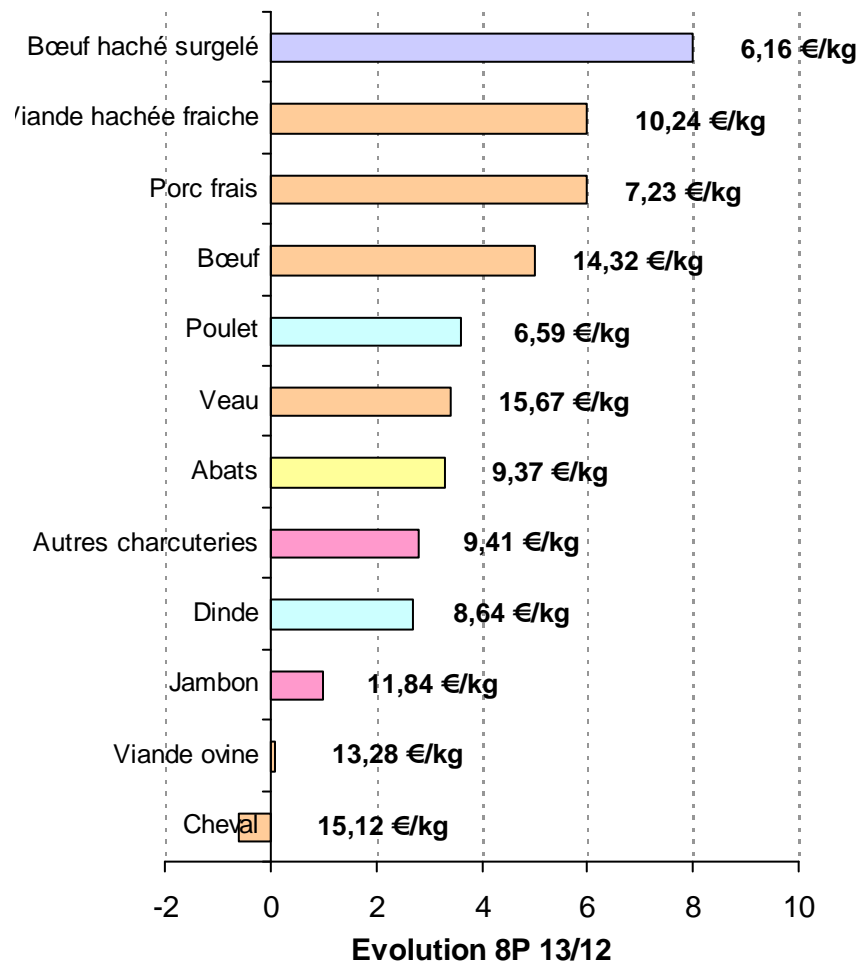


# Achats des ménages : comparaison des divers produits carnés

## Evolution des quantités achetées



## Evolution des prix d'achat

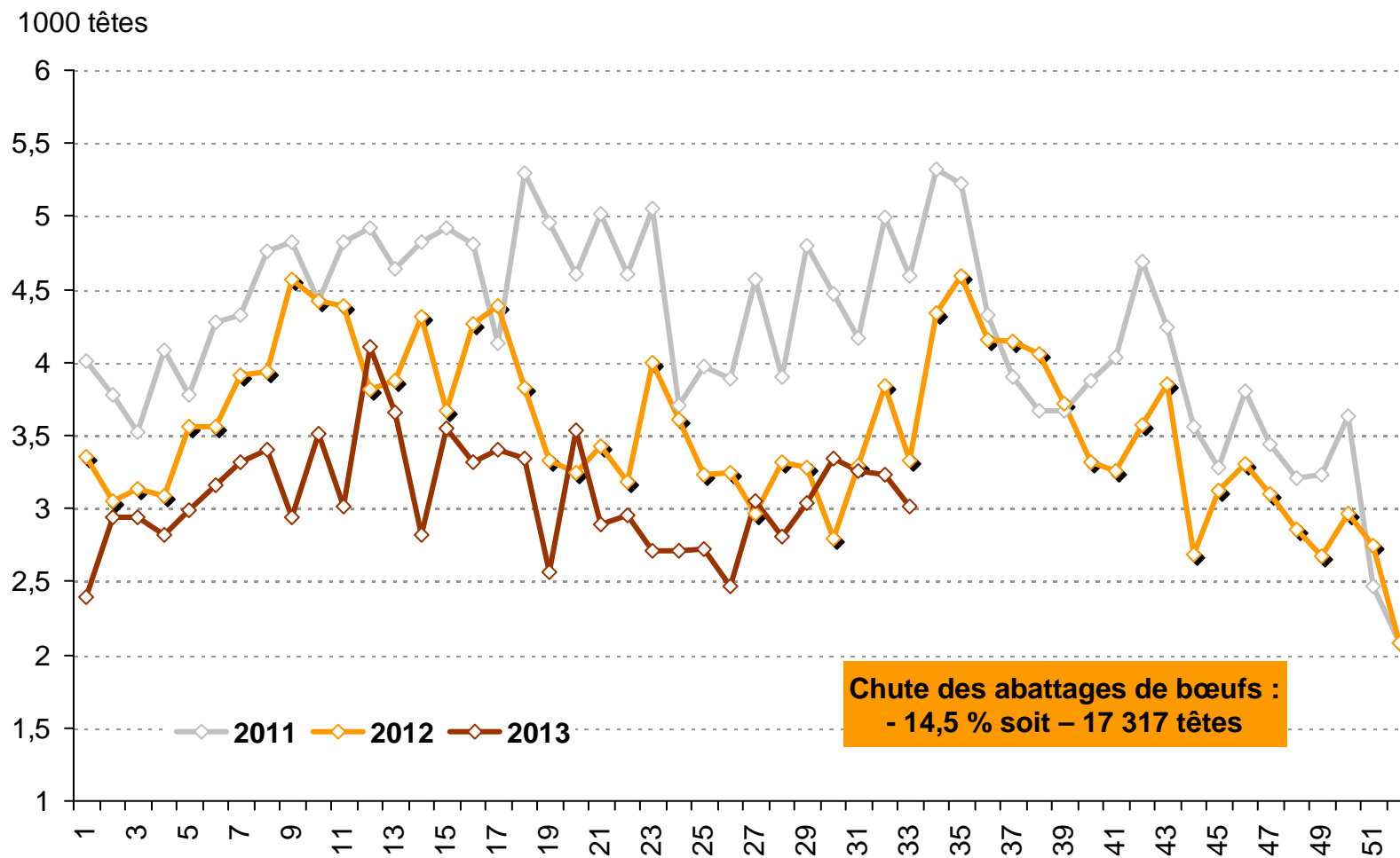




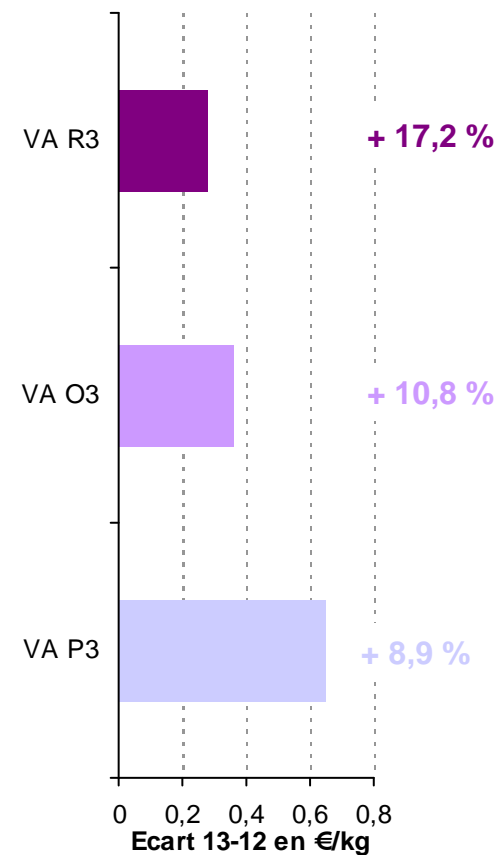
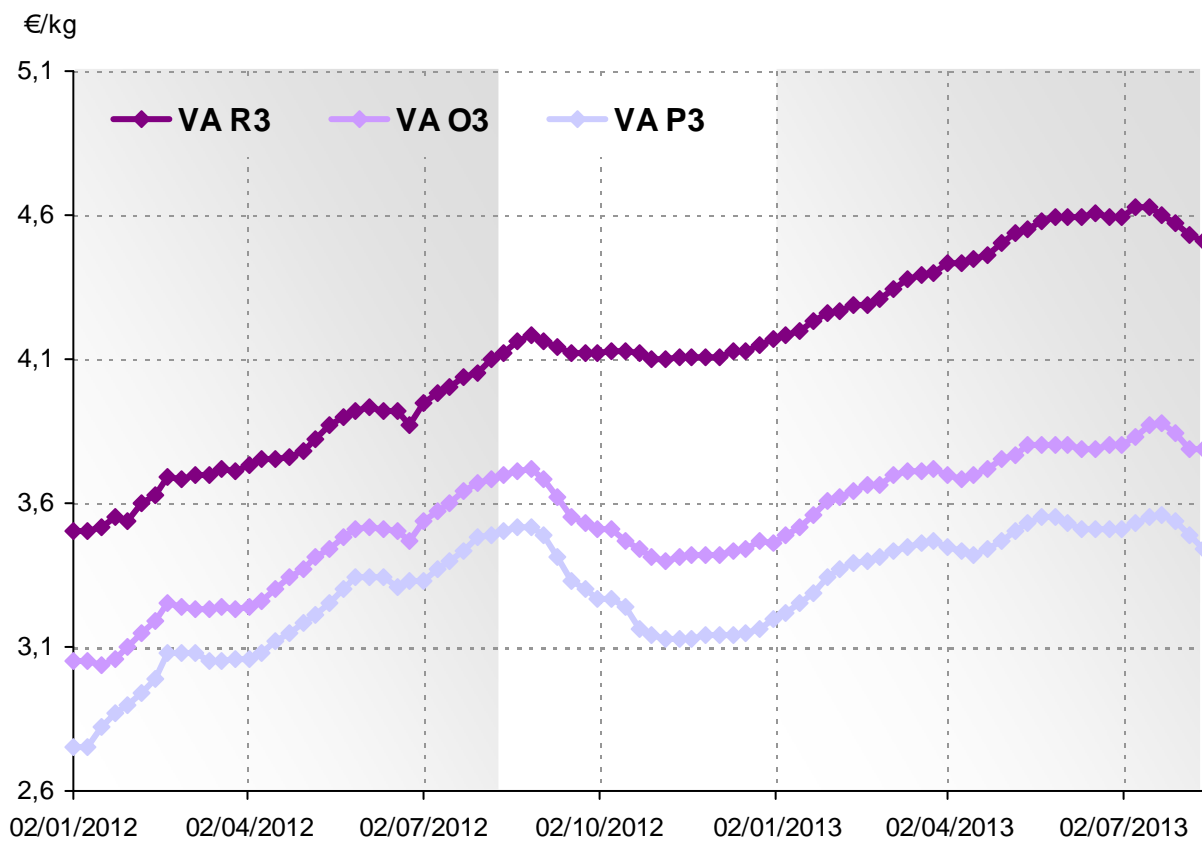
# Autres données



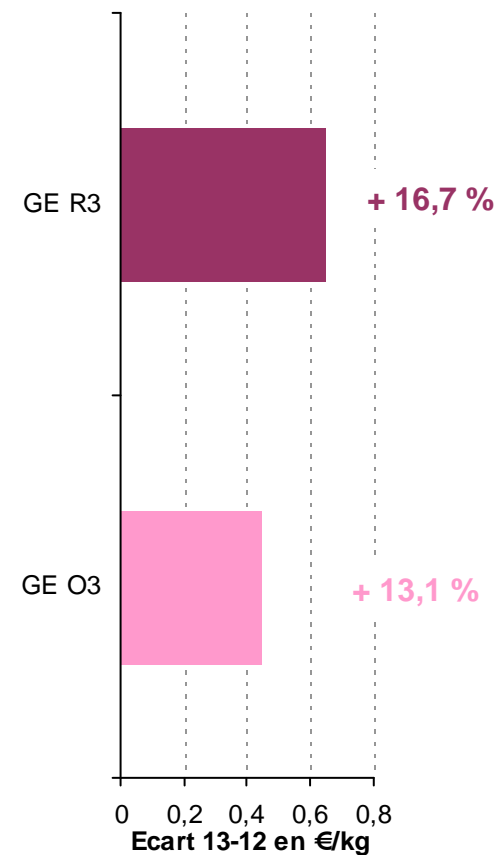
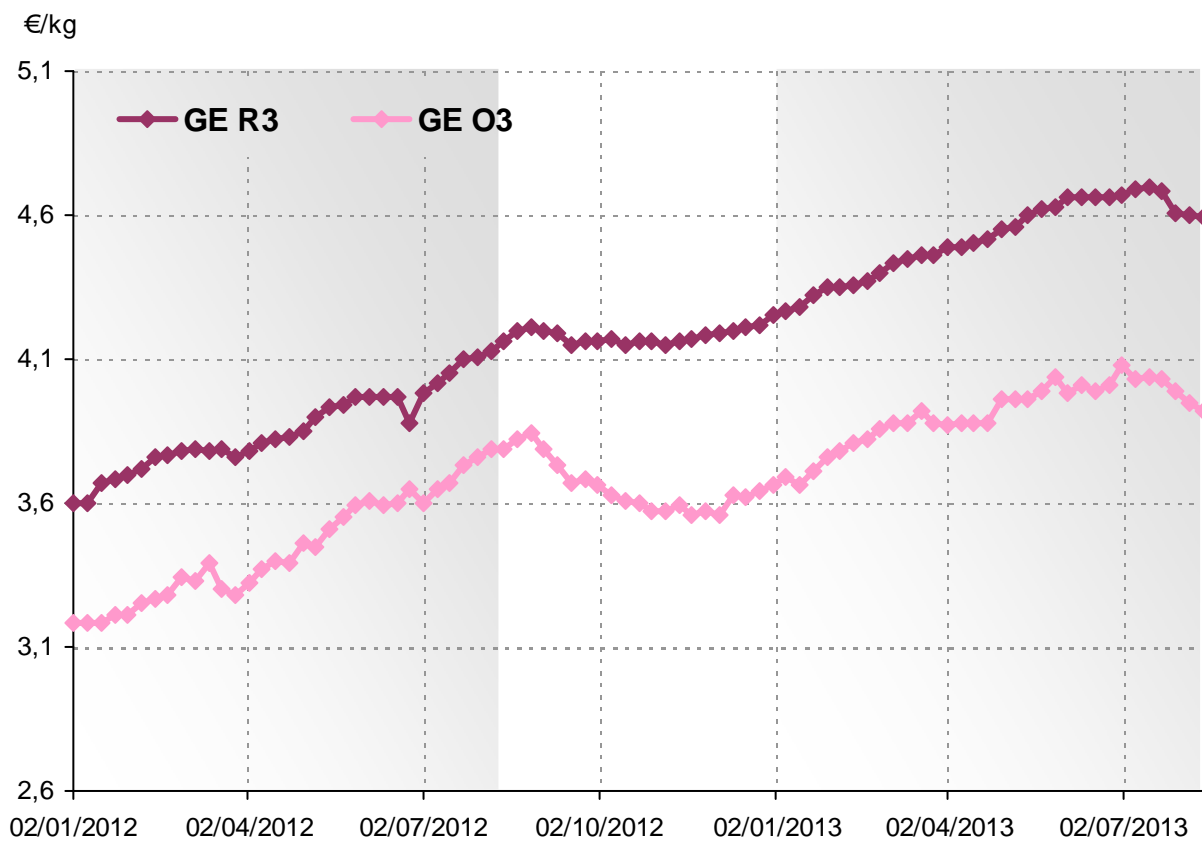
# Chute des abattages de bœufs



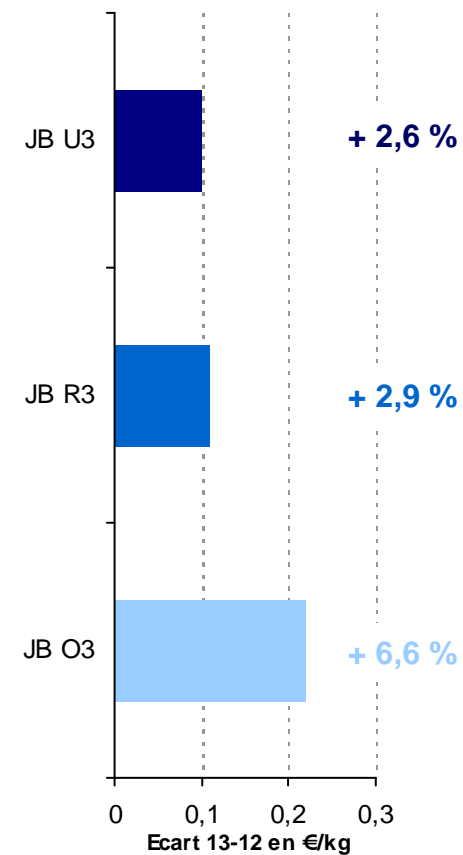
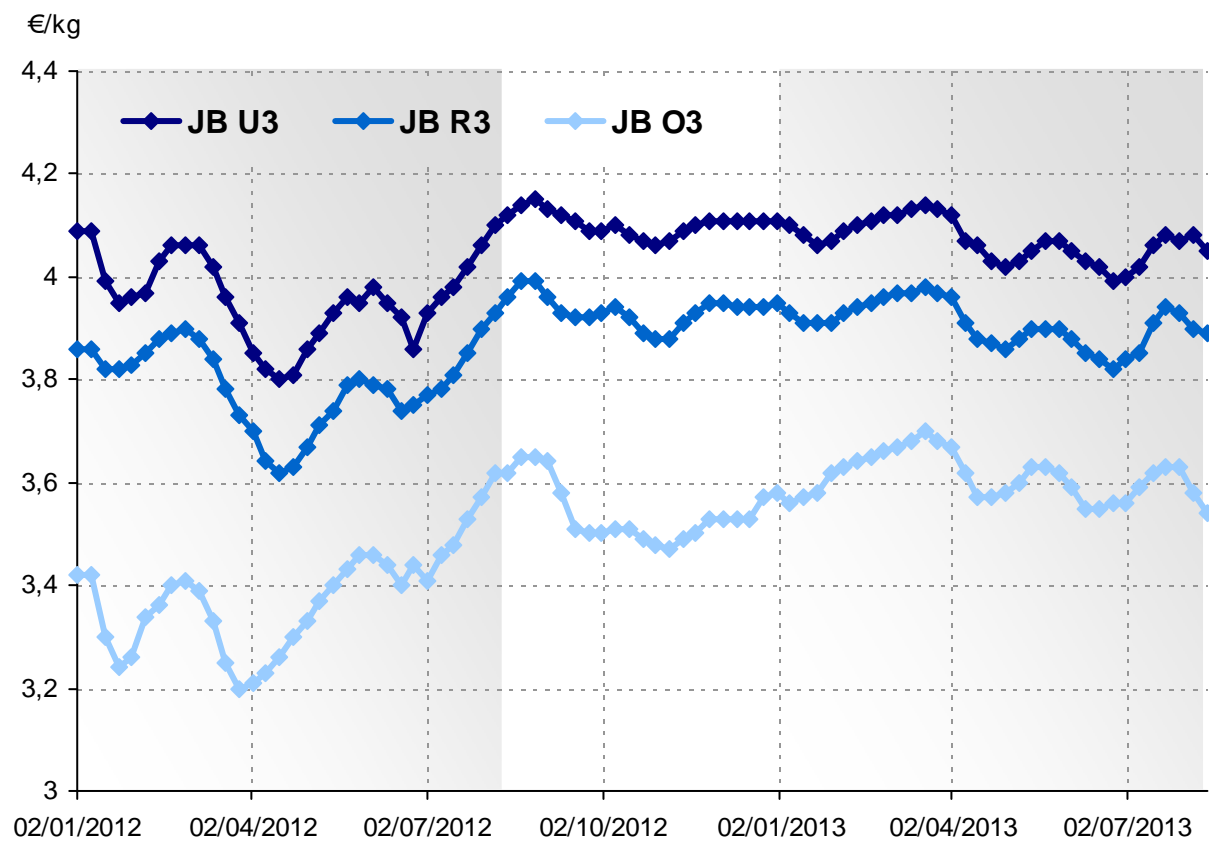
# Cours des vaches



# Cours des génisses

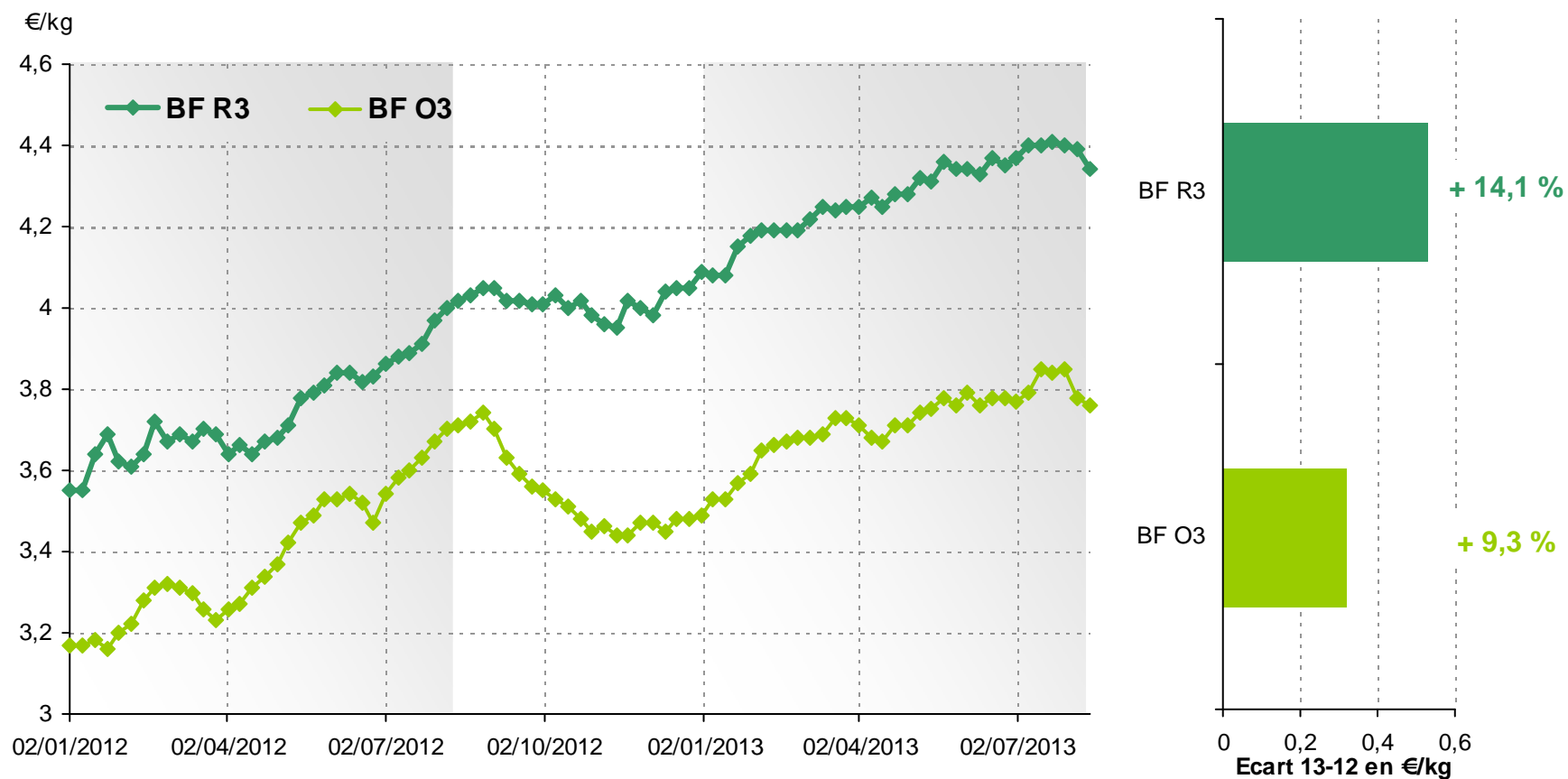


# Prix des jeunes bovins





# Prix des bœufs



# Prix des gros bovins dans l'UE

