BEEF

Industry sheet

Key statistics

France remains Europe's 1st producer of beef (1.3 million tonnes CWE[1])

Italy purchased 78% of the lean cattle aged 4 to 14 months exported by France

The decline in young cattle slaughtered has continued, albeit at a slightly slower pace

INDUSTRY STRUCTURE

- In 2018, the French cattle industry counted around 142,000 farms with at least five cows, and 19 million heads of cattle. Production includes in particular grassers[2], lean free-range cattle, and to a lesser extent fattened cattle, known as large adult bovines, of which cows account for 50%. These two activities are spread across relatively distinct geographical areas.
- Farms with suckler cows tend to be smaller: 64% have between 5 and 50 places.
- Large adult bovines reach the market through a variety of sector players: cooperatives, traders, and the remainder (on a smaller scale) through livestock markets.
- Abattoir and butchery is dominated by a European player which processes almost 50% of slaughtered volumes in France.

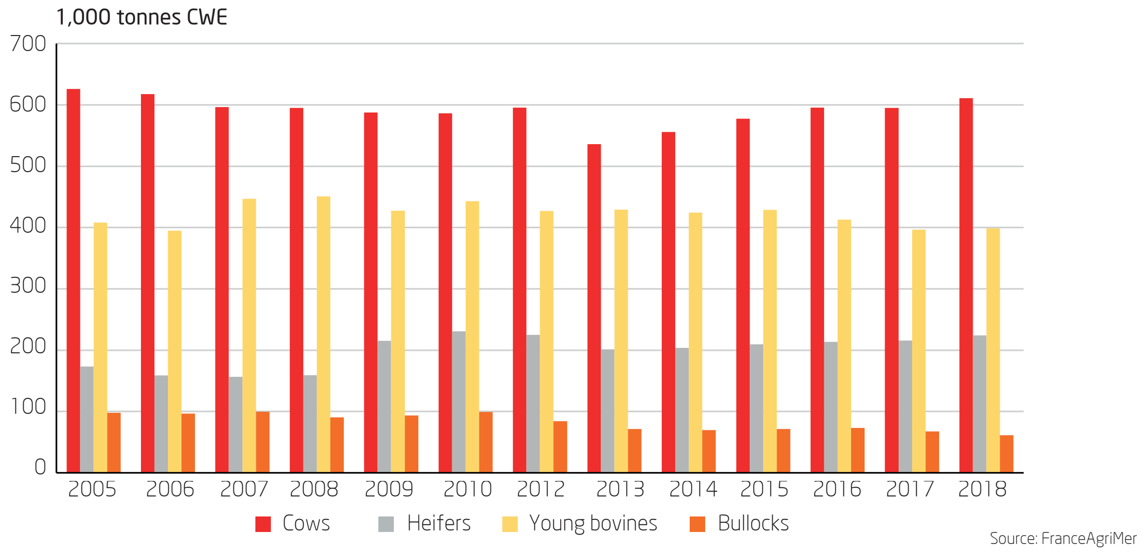
[2] Males and females from 4 to 10 months old, reared free range with their mother until weaning.

PRODUCTION

- France is the top European producer of beef, ahead of Germany, the UK, and Italy, with 1.30 million tonnes CWE[1] (of which around half is from suckler breeds).
- On 1 January 2019, 5 French regions alone accounted for 75% of the total count of suckler cows (meat breeds): Nouvelle Aquitaine, Auvergne-Rhône-Alpes, Occitanie, Bourgogne-Franche-Comté and Pays de la Loire.
- French beef production is mainly destined for the domestic market and, expressed in heads of cattle, can be broken down as follows: 49% cows, 28% bulls and young bovine[3], 18% heifers[4], 5% bullocks[5].

[1] Carcass weight equivalent tonnes: the standard unit used to measure the quantity of meat produced, traded (live or as meat), and consumed; CWEkg: carcass weight equivalent in kilograms; [3] Males aged between 10 and 24 months; [4]Females aged over 12 months who have never given birth to a calf; [5] Castrated males aged over 12 months

French adult bovine production 2000-2018

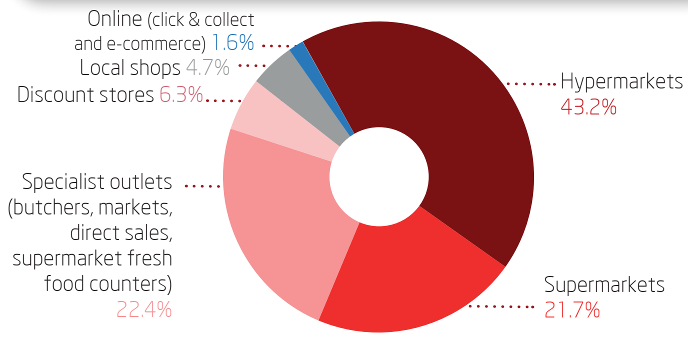


Source: FranceAgriMer

CONSUMPTION

- Beef (including veal) accounted for 28.2% of the total consumption of meat, poultry, and charcuterie products in France in 2018.
- In 2018, on average, each person in France consumed 23.1 CWEkg of beef (including veal), an increase of 2% compared to 2017. The French are thus the biggest consumers of beef in the European Union.
- Mince consumption is up in France.

Where French households bought butchery meat (beef, including veal) in 2018, excluding out-of-home catering



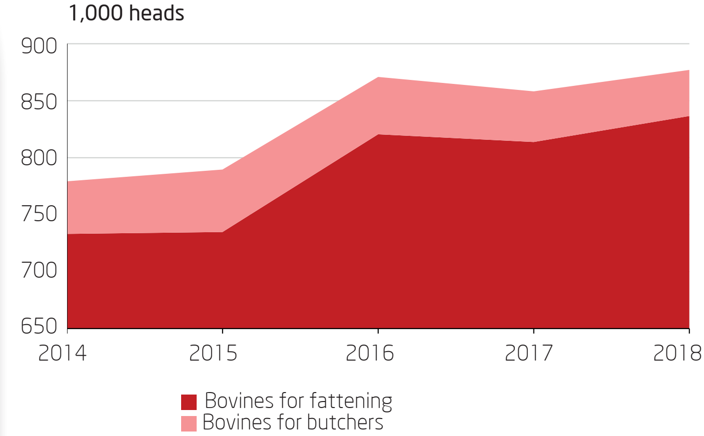
Source: FranceAgriMer from Kantar

TRADE

- Trade in livestock and meat takes place mainly within the European market (intra-EU market).
- France's top customers for livestock are Italy and Spain, and, to a lesser extent, countries around the Mediterranean. For meats, its main customers are Italy, Greece, and Germany.
- For livestock, France exports a total of 1.4 million cattle (excluding breeding stock, including calves), mostly destined for fattening. Grassers (lean cattle weighing more than 160 kg, excluding calves) account for the majority of French cattle exported, i.e. 1.08 million cattle. More than half are males over 300 kg (56%). The vast majority of these cattle are exported to Italy (78% of French grassers in 2018). French breeders are therefore highly dependent on the situation in Italy.
- Meat exports mainly concern fresh meat (83% by volume of total meat exports).
- French imports are mainly of fresh* (64% in volume) and frozen* (31%) meat. A total of 332,900 tonnes CWE of beef were imported into France in 2018, mainly from the Netherlands, Belgium, Germany, Ireland and Poland (these five countries account for 80% of the volumes of beef imported in 2018).

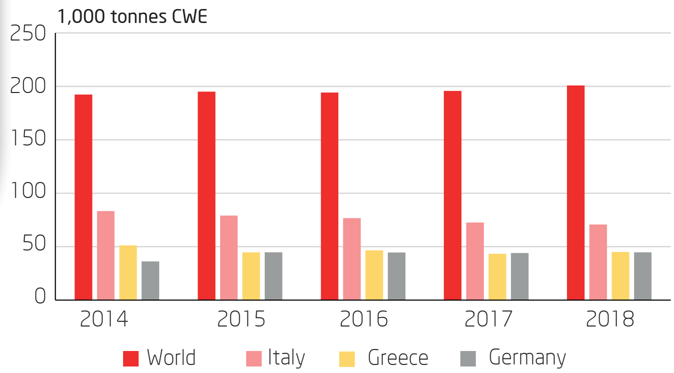
*Including veal

French exports of live bovines weighing >300 kg from 2014-2018



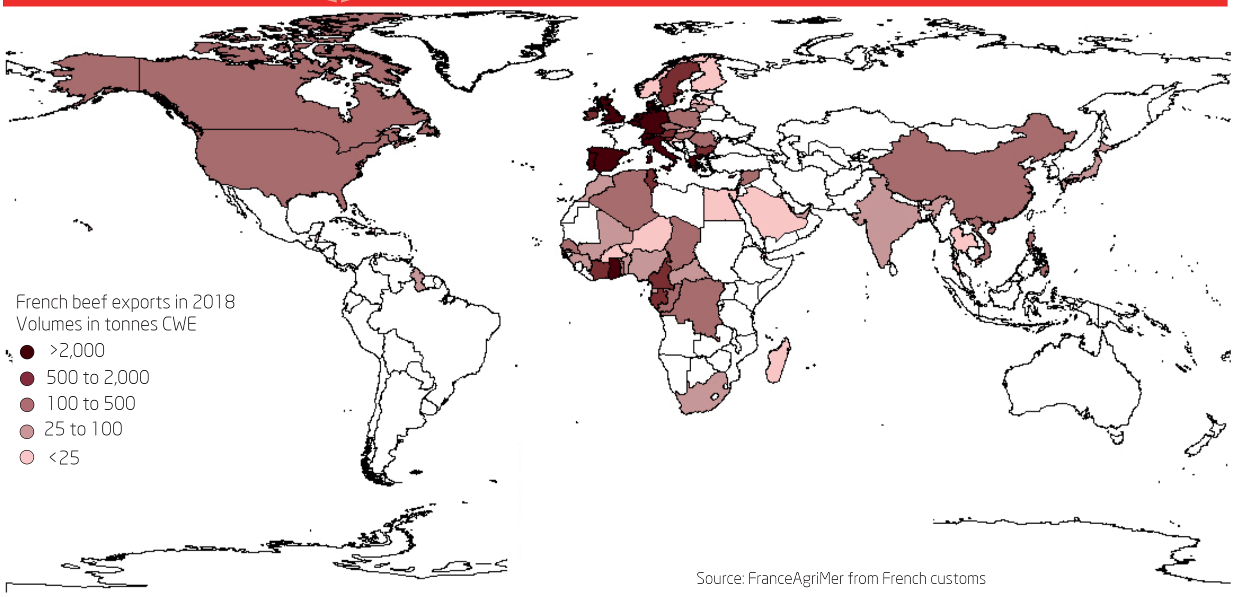
Source: FranceAgriMer from French customs

French fresh beef exports 2014-2018



Source: FranceAgriMer from French customs

MAIN EXPORT MARKETS



Source: FranceAgriMer from French customs

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