



key statistics :



France is Europe's top beef producer
Italy buys more than 85% of French exports of lean beef
More than one third of meat consumed in France is a beef product

INDUSTRY STRUCTURE

- The French beef industry is made up of around 163,000 farms with 19 million heads of cattle. Production includes in particular grassers¹, 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: 79% 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 50% of slaughtered volumes in France.

1. Males and females aged 12 months and over

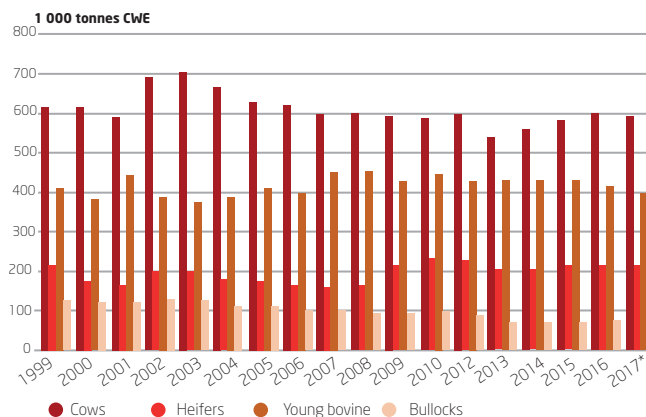
PRODUCTION

- France is the top European producer of beef, ahead of Germany, the UK, and Italy, with 1.3 million tonnes CWE² (of which around 66% from sucklers and 34% from dairy in 2014).
- 5 French regions alone account 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: 46% cows, 31% young bovine³; 17% heifers⁴; 6% bullocks.⁵

2. Carcass weight equivalent tonnes: the standard unit used to measure the quantity of meat produced, traded (live or as meat), and consumed; 3. Males aged between 8 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
1999-2017*

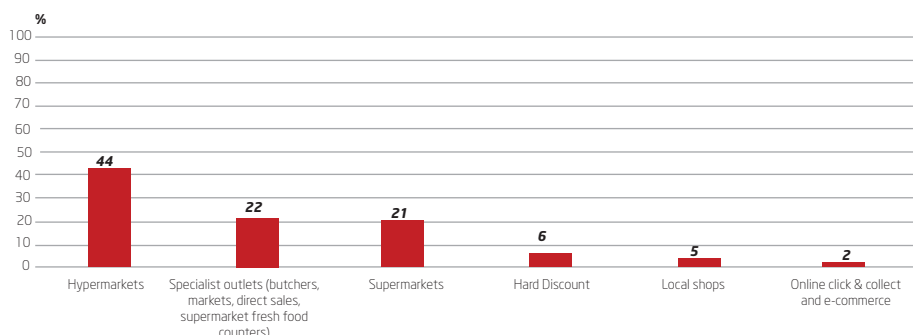


* Estimates
Source: FranceAgriMer from Eurostat

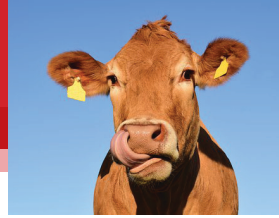
CONSUMER HABITS

- Beef (including veal) accounts for 17.1% of total consumption of meat, poultry, and cooked pork products in France.
- In 2017, on average, each person in France consumed 22.8 kg CWE of beef (including veal). The French are also the biggest beef-eaters in the European Union, closely followed by the Danes and the Irish, but far ahead of the Italians.
- Mince consumption is up in France.

Where French households buy beef
(including veal) in 2016



Source: FranceAgriMer from Kantar

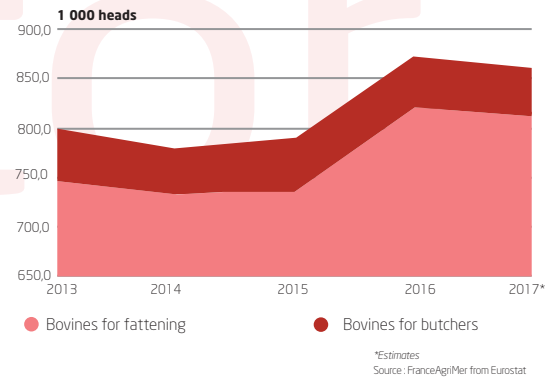


TRADE

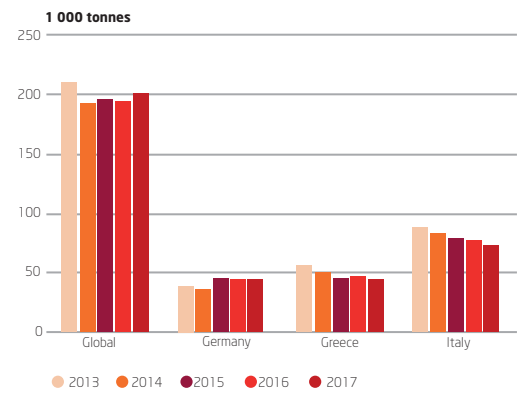
- Trade in livestock and meat takes place mainly within the European market (intra-EU market).
- France's top customers for livestock are Italy and Spain, and to a lesser extent countries around the Mediterranean. For meats, its main customers are Italy, Greece, and Germany.
- For livestock, France exports a total of 860,000 large bovines (weighing more than 300kg), mostly destined for fattening (95%). These are mainly males aged 8-12 months (grassers), exported to Italy (84% of total exports of bovines weighing over 300kg). French breeders are therefore highly dependent on the situation in Italy.
- Meat exports focus mainly on fresh (65%) and frozen (30%)
- France mainly imports fresh meat* (65% of total imported meat) and frozen meat* (30% by volume), or 318,000 tonnes CWE, mainly from Germany, the Netherlands, Ireland, Italy, and Poland.

*Including veal

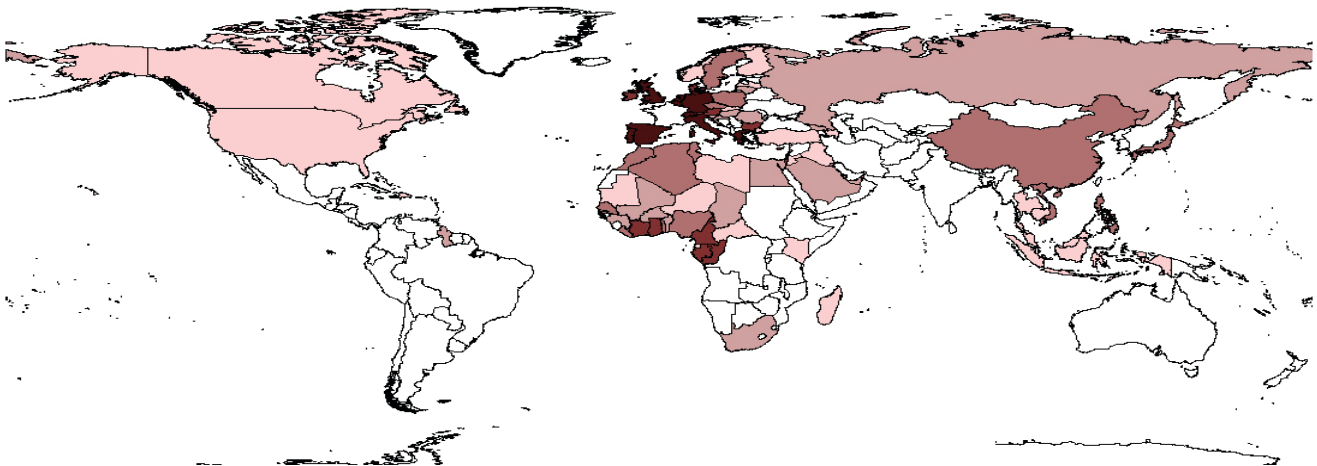
French exports of live bovines weighing 300kg + 2013-2017



French fresh meat exports 2013-2017



MAP OF MAIN EXPORT MARKETS



French beef exports in 2016
Volumes in tonnes CWE

- > 2 000
- de 500 à 2 000
- de 100 à 500
- de 25 à 100
- < 25