

THE KEY DATA
OF IDELE



French cattle 2024

Milk and meat production



ORGANISATION OF THE FRENCH BEEF AND DAIRY PRODUCTION

EVOLUTION OF THE NUMBER OF SUCKLER AND DAIRY FARMS

Source: SPIE-BDNI, data processed by *Institut de l'Élevage*

In december (thousands)	2013	2022	2023
Suckler and dairy holders	202	153	148
- having less than 8 LU (Livestock Units) and <5 cows	38	27	26
Suckler and dairy holders (> 8 LU and > 5 cows)	164	126	122
- of these : dairy* (> 10 dairy cows)	70	49	46
- of these : suckler (> 20 suckler cows)	62	53	51

*Crossbred cows with a dairy sire are considered as dairy cows.

AGE OF THE FARMERS (INCLUDING CO-HEADS OF FARM) IN FRANCE

Source: Agreste-Agriculture's Census, 2020, processed by *Institut de l'Élevage*

In 2020	Dairy farmers		Suckler farmers	
	% of the farmers	% the cows*	% of the farmers	% the cows*
Less than 40 years old	25%	28%	22%	25%
40-49 years old	24%	-	23%	-
50 years old or more	51%	47%	54%	51%
- of these : 55 years old or more	33%	30%	38%	34%

*Cows kept by at least ONE farmer of the age category.

DISTRIBUTION OF THE DAIRY HERD AND ITS HOLDERS, ACCORDING TO THE SIZE OF THE HERD IN THE BARN*

Source: SPIE-BDNI, processed by *Institut de l'Élevage*

In 2023 (thousands)	Number of farmers	% of the total	Number of cows	% of the total
10-49 dairy cows	16	34%	507	15%
50-69 dairy cows	11	23%	636	19%
70-99 dairy cows	11	23%	877	26%
100-149 dairy cows	7	16%	871	26%
150 dairy cows or more	2	5%	420	13%

*Barn with more than 8 LU and 10 dairy cows.

DISTRIBUTION OF THE SUCKLER HERD AND ITS HOLDERS, ACCORDING TO THE SIZE OF THE HERD IN THE BARN*

Source: SPIE-BDNI, processed by *Institut de l'Élevage*

In 2023 (thousands)	Number of farmers	% of the total	Number of cows	% of the total
5-19 suckler cows	21	29%	257	7%
20-49 suckler cows	25	35%	832	24%
50-69 suckler cows	10	14%	582	17%
70-99 suckler cows	9	12%	725	21%
100 suckler cows or more	7	10%	1 061	31%

*Barn with more than 8 LU and 5 suckler cows.

THE FRENCH CATTLE HERD

NUMBER OF COWS AND HEAD OF CATTLE IN CONTINENTAL FRANCE (THOUSANDS OF HEAD)

Source: Eurostat according to SSP (for 1995 and 2000) and SPIE-BDNI, processed by *Institut de l'Élevage*

As of January 1	1995	2000	2014	2022	2023	2024
Dairy cows*	4,760	4,424	3,808	3,503	3,428	3,374
Suckler cows	3,983	4,071	3,952	3,669	3,565	3,498
Total head of cattle	20,507	20,216	18,975	17,154	16,776	16,356

*Crossbred cows with a dairy sire are considered as dairy cows.

REGIONAL DISTRIBUTION OF THE FRENCH BREEDING LIVESTOCK AS OF JANUARY 1ST (%)

Source: SPIE-BDNI, processed by *Institut de l'Élevage*

Dairy cows			Suckler cows		
Regions	2014	2024	Regions	2014	2024
Bretagne	20%	20%	Nouvelle-Aquitaine	22%	22%
Normandie	16%	17%	Auvergne-Rhône-Alpes	16%	17%
Pays de la Loire	14%	15%	Bourgogne-Franche-Comté	13%	13%
Auvergne-Rhône-Alpes	13%	13%	Occitanie	13%	13%
Grand-Est	9%	9%	Pays de la Loire	11%	10%
Hauts-de-France	9%	9%	Grand-Est	7%	7%
Bourgogne-Franche-Comté	7%	8%	Normandie	6%	6%
Nouvelle-Aquitaine	6%	4%	Centre-Val de Loire	5%	5%

NUMBER OF COWS PER BREED, ON JANUARY THE 1ST (1,000 HEAD)

Source: SPIE-BDNI, processed by *Institut de l'Élevage*

Breed	2014	2024	Change in %: 2014/2024	% of total 2024
Prim'Holstein	2,458	2,100	-15%	31%
Charolaise	1,521	1,207	-21%	18%
Limousine	1,035	1,020	-1%	15%
Montbéliarde	646	559	-13%	8%
Blond of Aquitaine	482	388	-19%	6%
Normande	366	249	-32%	4%
Aubrac	170	245	+44%	4%
Salers	205	200	-2%	3%
Crossbred*	589	585	-1%	9%
Other breeds	288	319	+11%	5%
Total	7,760	6,873	-11%	100%

*Not based on the breeder's declaration but on the breeds of the sire and the mother cow.

BEEF MEAT IN FRANCE

PRODUCTION OF FINISHED CATTLE AND VEAL

Source: GEB-*Institut de l'Élevage* according to SSP and French customs

	2013	2023		
	(1,000 head)	(1,000 head)	(1,000 tonnes cwe*)	% of large cattle
Cows	1,508	1,456	533	46%
Heifers	581	599	217	19%
Steers	185	117	46	4%
Bulls	1,081	862	361	31%
Total large cattle	3,355	3,035	1,157	100%
Total veal	1,310	1,029	149	

*cwe : carcass-weight equivalent.

AVERAGE ANNUAL PRODUCER PRICES

Source: *Institut de l'Élevage*, according to FranceAgriMer and INSEE

€/kg cwe	2013	2022	2023
Cow, R conformation	4.37	5.13	5.44
Cow, O conformation	3.63	4.73	4.80
Heifer, R conformation	4.46	5.16	5.49

€/kg cwe	2013	2022	2023
U Young Bull	4.05	5.19	5.41
R Young Bull	3.89	5.06	5.27
O Young Bull	3.54	4.71	4.93

FRENCH TRADE IN BEEF, VEAL AND FINISHED CATTLE*

Source: GEB-*Institut de l'Élevage* according to French customs

	2013	2020	2021	2022	2023	2023/ 2022	2023/ 2013
Beef and veal imports (thousands of carcass tonnes)	375	266	302	366	343	-6%	-9%
- of which fresh or chilled meat	260	170	194	234	227	-3%	-13%
- of which frozen meat	94	85	89	115	101	-12%	+7%
- of which meat preparations	20	11	18	16	15	-11%	-28%
Beef meat exports (thousands of carcass tonnes)	270	220	244	239	210	-12%	-22%
- of which fresh or chilled meat	232	182	192	189	171	-10%	-27%
- of which frozen meat	17	20	31	30	29	-5%	+69%
- of which meat preparations	21	18	20	20	11	-44%	-48%
Export of live finished adult cattle (1,000 heads)	138	39	39	32	29	-9%	-79%
- of which young bulls	122	25	29	21	18	-14%	-85%

* Raw data, without correction for the Brexit effect.

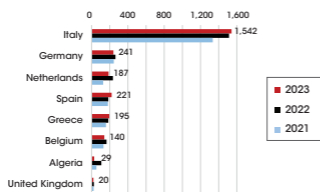
Evolution (%)	2023/2013	2023/2022
Mean annual prices for producers	+30%	+4%
Agricultural Means of Production Purchasing Price Index (IPAMPA) for beef meat	+30%	-0,1%

€/kg cwe	2013	2022	2023
Veal, O conformation, light rose coloured meat	5.96	6.73	7.10

FRENCH INTERNATIONAL TRADE IN BEEF, VEAL AND CATTLE (MEAT, OFFALS, LIVE CATTLE EXCLUDING BREEDING CATTLE)*

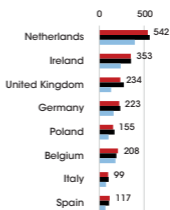
Source: GEB-*Institut de l'Élevage* according to French customs

Exports in millions of €*



Total: 2.7 billions € in 2023

Imports in millions of €*



Total: 2.1 billions € in 2023

*Raw data, without correction for the Brexit effect.

MEAT CONSUMPTION IN FRANCE

Source: GEB-*Institut de l'Élevage* according to SSP and French customs

	Total consumption (1,000 tonnes cwe*)		In kg cwe* per capita		Slaughtering/Consumption (%)	
	2018	2023	2018	2023	2018	2023
Beef and veal	1,560	1,450	23.3	21.3	94%	90%
Pork	2,204	2,087	32.9	30.6	99%	99%
Poultry	1,869	1,978	27.9	29.0	92%	77%
Lamb and sheep meat	164	149	2.4	2.2	50%	49%
Goat meat	5	5	0.1	0.1	134%	120%
Horse meat	9	5	0.1	0.1	28%	19%

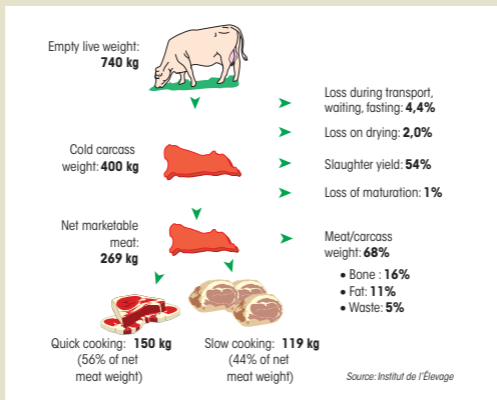
FOREIGN EXCHANGE OF BEEF MEAT, COMPARED TO NATIONAL PRODUCTION AND CONSUMPTION

Source: GEB-*Institut de l'Élevage* according to SSP

Beef, veal and live fattened cattle, in volume	2013	2021	2022	2023
Exports / Production (%)	19%	18%	19%	17%
Imports / Consumption (%)	25%	21%	26%	25%

The weight of imports in consumption is given without correction for the value imported from the United Kingdom and immediately re-exported to the Netherlands since the implementation of *Brexit*. Taking into account this *Brexit* effect, the share of imported meat in consumption in 2021 would be reduced from 21% to 20%; and in 2022 from 26% to 24%.

FROM ANIMAL TO STEAK - TYPICAL YIELD OF A 400 KG SUCKLER COW (CHAROLAIS), CARCASS CLASSIFIED U3

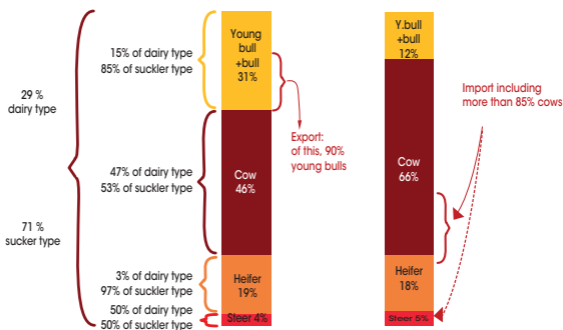


TYPE OF BEEF (EXCLUDING VEAL) PRODUCED AND CONSUMED IN FRANCE IN 2022

Source: GEB-Institut de l'Élevage estimates, in % of the large cattle slaughtered (in tonnes cwe)

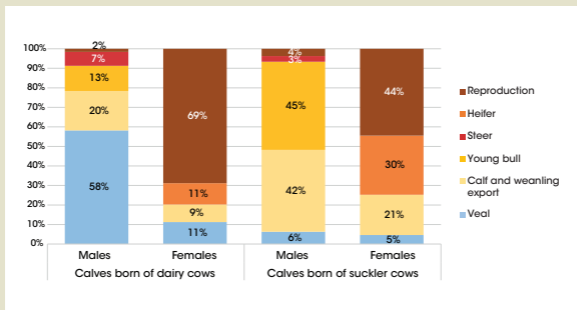
Production: 1.16 million of tons cwe

Consumption: 1.26 million of tons cwe



INSTITUT DE L'ÉLEVAGE ESTIMATES OF THE CALVES' FINAL DESTINATION, FOR THOSE BORN IN 2022*

According to SPIE/BDNI and Normabev data in May 2024 (n+2) and Institut de l'Élevage estimates



*Excluding losses of head of cattle before accomplishment of their main purpose (before slaughter, live export or reproduction).

LEAN CATTLE IN FRANCE

FRENCH EXCHANGES OF CALVES AND WEANLINGS

Source: GEB-Institut de l'Élevage according to French customs

1,000 of head	2019	2020	2021	2022	2023
Weanlings exported *	1,179	1,142	1,149	1,068	994
- Of which: male	771	750	756	708	656
- Of which: female	408	392	393	360	338
Calves imported **	17	8	8	8	2
Calves exported ***	290	321	344	367	356

*4 to 15 months old beef cattle (male and female).

**Less than 80 kg live weight.

***Less than 2 months old dairy calves.

AVERAGE ANNUAL PRODUCER PRICES

Source: GEB-Institut de l'Élevage according to FranceAgriMer

Males, €/kg live weight	2013	2022	2023	Females, €/kg live weight	2013	2022	2023
Charolais, U conformed, 450 kg live weight	2.44	3.19	3.40	Charolaise, U conformed, 270 kg live weight	2.48	3.07	3.30
Limousin E, 350 kg live weight	2.81	3.36	3.79	Limousine E, 270 kg live weight	2.80	3.15	3.34

MILK AND DAIRY PRODUCTS IN FRANCE

REGIONAL EVOLUTION OF MILK DELIVERIES AND OF THE NUMBER OF MILK SUPPLIERS

Source: GEB-*Institut de l'Élevage* according to SSP & FAM, annual and monthly survey

	Milk deliveries (In millions of liters)			Number of milk suppliers		
	2013	2023	Change in %	2013	2023	Change in %
FRANCE	23,278	22,735	-2%	65,618	42,634	-35%
Bretagne	5,136	5,166	+1%	12,833	8,418	-34%
Normandie	3,536	3,814	+8%	9,344	6,050	-35%
Pays de la Loire	3,614	3,594	-1%	8,933	5,810	-35%
Auvergne-Rhône-Alpes	2,469	2,295	-7%	10,471	6,930	-34%
Hauts-de-France	2,211	2,176	-2%	5,661	3,764	-34%
Grand-Est	2,164	2,226	+3%	5,451	3,602	-34%
Bourgogne-Franche-Comté	1,479	1,594	+8%	4,845	3,832	-21%
Nouvelle-Aquitaine	1,308	851	-35%	3,620	1,784	-51%
Occitanie	855	569	-33%	3,214	1,668	-48%
Centre-Val de Loire	442	402	-9%	998	623	-38%

AVERAGE MILK YIELDS

Source: GEB-*Institut de l'Élevage* and milk recordings

	Milk produced per dairy cow ⁽¹⁾ (in kg/year)	Milk recordings		
		Number of farms recorded (in thousands)	Nb dairy cows (thousands of head)	Milk yield (kg) per lactation
1993	5,036	71.7	2,531	6,509
2002	6,062	69.0	2,836	7,188
2012	6,765	50.0	2,506	8,561
2022	7,504	27.6	2,045	8,878
2023	7,520	26.0	1,964	8,938

(1) This is milk produced by dairy cows (different from milk deliveries).

PRODUCTION AND CONSUMER PRICES

Source: *Institut de l'Élevage*, SSP and INSEE

		2013	2018	2022	2023
€/1,000 liters	Standard-milk price	344	338	437	461
	Milk price	109	107	138	146
Base 100 in 2015	Agricultural means of production purchasing price index (IPAMPA) for cow's milk	104	103	134	135
	Consumer price index for milk and dairy products	99	103	112	117

*Consumer price index.

PRODUCTION AND CONSUMPTION OF DAIRY PRODUCTS IN FRANCE

Source: GEB-*Institut de l'Élevage* according to CNIEL and SSP

	2013			2023		
	Production*	Consumption**	Per capita consumption	Production*	Consumption**	Per capita consumption
	1,000 tonnes		kg	1,000 tonnes		kg
Drinking milk	3,718	3,578	54.6	2,777	2,701	39.6
Fresh yogurts and dairy desserts	2,303	1,928	29.4	1,939	1,739	25.5
Cheese (all species' milk)	1,820	1,410	21.5	1,739	1,560	22.9
Butter and dairy fat	412	524	8.0	405	555	8.1

*Industrial

**Including self-consumption and direct sales.

STRUCTURE OF FOREIGN TRADE IN DAIRY PRODUCTS* IN 2023

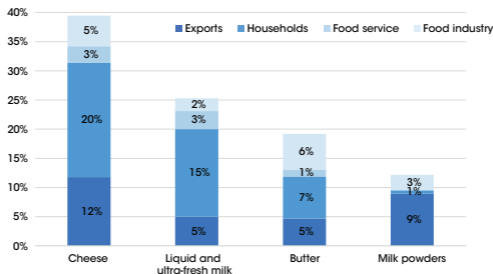
Source: GEB-*Institut de l'Élevage* according to CNIEL

	Imports		Exports		Balance in million €
	Million €	%	Million €	%	
Cheese	2,791	48	3,844	42	+1,053
Milk powders	458	8	2,093	23	+1,635
Drinking milk	173	3	299	3	+126
Yogurts and fermented milks	185	3	564	6	+379
Cream for direct consumption	375	6	492	5	+117
Butter	1,350	23	727	8	-623
Other dairy products	530	9	1,057	12	+527
TOTAL dairy products	5,862	100	9,076	100	+3,214

*Milk and dairy products: 0401 to 0406 + flavored milk, infant milk, caseins, and lactose.

USE OF COLLECTED MILK ACCORDING TO PRODUCTION TYPES AND THEIR DESTINATIONS IN 2019 (% OF DRY MILK SOLIDS)

Source: GEB-*Institut de l'Élevage* according to SSP, national Customs, IRI & GIRA



BEEF AND DAIRY PRODUCTION IN EUROPE

MILK PRODUCTION AND DELIVERIES IN EUROPE

Source: GEB-Institut de l'Élevage according to Eurostat

Country	Dairy herds (in 1,000 head) as of 12/01/2023	Milk produced per dairy cow in 2023 (in kg/year) *	Estimated milk production in 2023	Milk deliveries in 2023	Share in EU milk deliveries 2023 (%)
			1,000 tonnes		
Germany	3,713	8,733	32,848	31,449	22
France	3,165	7,489	23,950	23,406	16
Netherlands	1,546	9,418	14,673	13,894	10
Poland	2,069	7,549	15,497	13,102	9
Italy	1,808	7,135	13,103	12,915	9
Ireland	1,511	5,780	8,730	8,710	6
Spain	786	9,363	7,470	7,329	5
Denmark	547	10,311	5,686	5,685	4
EU 27	19,729	7,748	154,244	143,770	100

*Milk production per dairy cow, yearly average, based on the average number of cows from the previous year and the current year.

DAIRY PRODUCTS' CONSUMPTION IN EUROPE IN 2022 (KG PER CAPITA)

Source: FIL

Country	Liquid milks and dairy drinks	Butter	Cheeses
France	41.8	8.2	27.4
Germany	46.5	5.4	24.8
Denmark	68.5	8.9	28.3
Italy	46.4	2.7	21.7
Spain	68.7	0.4	7.6
Poland	49.4	5.8	18.2
Netherlands	42.0	2.3	24.0
Belgium	40.3	1.5	14.4
EU 27	49.7	4.0	20.2

PRODUCTION AND CONSUMPTION OF BEEF AND VEAL IN 2022 IN THE EUROPEAN UNION

Source: GEB-Institut de l'Élevage according to SPIE-BDNI, SSP and Eurostat

Country	National cow herd (1,000 head) on January the 1st, 2023	Controlled slaughtering		Consumption	
		in 1,000 tonnes cwe*	% of EU-27 production	in 1,000 tonnes cwe*	in kg cwe* per capita
France	6,873	1,307	20	1,450	21.3
Germany	4,338	993	16	1,082	13.0
Spain	2,841	695	11	573	11.9
Italy	2,289	620	10	881	14.9
Ireland	2,392	600	9	145	27.5
Poland	2,204	515	8	49	1.3
Netherlands	1,591	435	7	312	17.5
Belgium	891	240	4	170	14.5
EU 27	30,014	6,376	100	6,159	13.8

*cwe : carcasse-weight equivalent.

BEEF AND DAIRY PRODUCTION IN THE WORLD

MAIN CATTLE HERDS IN 2023 (MILLIONS OF HEAD)

Source: GEB-*Institut de l'Élevage* according to various sources (USDA, national Customs, MLA, FNP...)

	Total cattle herd	of which : dairy cows		Total cattle herd	of which : dairy cows
India	307	129	EU 27	74	20
Brazil	194	16	Argentina	53	2
China	102	14	Australia	29	1
USA	89	9	Russia	17	7

DAIRY PRODUCTS' TRADE IN 2023 (IN MILLION TONNES OF MILK EQUIVALENT)

Source: GEB-*Institut de l'Élevage* according to FAO, FIL and national Customs

	Exports	Imports	Production	Consumption	"Consum. / capita (kg / capita)"
EU 27	26.3	3.1	159.8	136.6	304
New-Zealand	20.0	0.2	21.2	1.5	279
USA	13.1	3.1	102.8	92.8	277
Australia	2.4	1.4	8.5	7.5	281
United Kingdom	3.1	3.5	15.5	15.8	232
Argentina	2.3	0.0	11.7	9.4	202
India	0.3	0.2	207.1	207.0	145
Ukraine	0.5	0.2	7.2	6.9	187
Russia	0.4	3.6	34.0	33.0	265
Brazil	0.1	1.8	36.7	38.4	177
Mexico	0.1	4.2	14.0	18.0	140
China	0.2	12.6	42.0	54.4	39

INTERNATIONAL TRADE OF BEEF IN 2023 (THOUSANDS OF TONNES CWE*)

Source: GEB-*Institut de l'Élevage* according to various sources (USDA, MLA, CONAB and national Customs)

	Exports	Imports	Production	Consumption	Consumption / capita, in, kg, cwe *
Brazil	2,730	61	9,730	7,061	34.6
Australia	1,494	15	2,224	745	28.9
India	1,483	0	4,470	2,987	2.1
USA	1,273	1,604	12,254	12,585	37.8
Argentina	893	0	2,824	1,931	41.8
New, Zealand	651	2	748	99	19.4
EU, 27	580	341	6,376	6,137	13.7
Vietnam*	117	312	280	475	4.8
China	18	3,566	7,500	11,048	7.8
Japan	10	667	457	1,114	8.9
South, Korea	0	575	345	920	17.9

*cwe: carcass-weight equivalent.

**Exports from Vietnam to China and Hong Kong may be misestimated due to the importance of the undeclared market.

2023-2027: Bovine coupled supports

Animal coupled supports have been modified with the CAP reform implemented in 2023, and the allocated budget decreases every year. The suckler cow support and the dairy cow support, that were previously paid per cow have been grouped into a unique bovine coupled support. The support for suckler calves production with a quality Label has been simplified.

Bovine coupled support - 672 M€ in 2024 (689 M€ in 2023)

This new support is given for **animals older than 16 months** and based on the number Livestock Units (LU). LU coefficients are: 0.6 LU for animals from 16 to 24 months and 1 LU for animal over 24 months old.

Eligible animals: cattle over 16 months old, males and females, kept for at least 6 months in the farm. The support is available from 5 UGB.

Payment conditions: this support is separated into 2 levels:

- **higher level:** for suckler females, up to twice the number of calves born on the farm over the previous 15 months (held for 90 days); and for males, within the limit of the number of eligible cows (without any breed criteria).
- **standard level:** for dairy females, and for males and suckler females beyond the capping criteria (see beneath).

Capping: the total of eligible LUs is capped at a maximum corresponding to 1.4 times the available forage area ("density cap") and 120 LUs, with application of the French transparency for "GAEC" societies. Furthermore, only 40 LUs can be awarded at the standard level (with a guarantee of 40 eligible LUs, without application of the "density" cap).

Support for suckler calves production with a quality Label ("Label Rouge", GI, Organic)

Eligible animals: calves of suckler or mixed breeds (or resulting from a cross with one of these breeds) and produced under a quality scheme such as French "Label Rouge", GI (Geographical indication) or Organic, slaughtered the previous year (excluding O and P conformations, and fattening level 1).

Amounts of payments for 2023 and estimated for 2024 and reminder of the previous CAP

CAP 2023-2027		Amounts paid in 2023	Estimated amounts for 2024	Reminder: CAP 2014-2022	Amounts paid in 2022
Bovine coupled support (€/LU)	High level	110€	107€	Coupled support for suckler cows	50 first cows 171.5€
	Standard level	60€	58€		51th to 99th cow 123€
Coupled support for suckler calves production with quality Label (€/animal)		6 €	62€		100th to 139th cow 62€
				Coupled support for milk cows	30 first cows - mountain area 83.6€
					40 first cows - outside mountain area 41.95€
				Coupled support for suckler calves production with quality Label	Calves raised within a quality scheme 48€
					Calves raised and sold within a quality scheme 67€

¹ Forage area: areas of grass and fodder legumes + areas of self-consumed cereals taken into account for the ICHN for applicants eligible for the ICHN or area of silage maize and forage meslin for non-ICHN applicants.

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