

THE KEY DATA  
OF IDELE



# French cattle 2025

## 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 Idele

In december (thousands)	2014	2023	2024
Suckler and dairy holders	198	148	144
- having less than 8 LU (Livestock Units) and <5 cows	37	26	25
Suckler and dairy holders (> 8 LU and > 5 cows)	161	122	119
- of these : dairy* (> 10 dairy cows)	67	47	45
- of these : suckler (> 20 suckler cows)	62	51	50

\*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 Idele

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 Idele

In 2024 (thousands)	Number of farmers	% of the total	Number of cows	% of the total
10-49 dairy cows	15	33%	469	14%
50-69 dairy cows	10	23%	608	19%
70-99 dairy cows	10	23%	859	26%
100-149 dairy cows	7	16%	886	27%
150 dairy cows or more	2	5%	435	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 Idele

In 2024 (thousands)	Number of farmers	% of the total	Number of cows	% of the total
5-19 suckler cows	21	29%	250	7%
20-49 suckler cows	24	34%	811	24%
50-69 suckler cows	10	14%	570	17%
70-99 suckler cows	8	12%	702	21%
100 suckler cows or more	8	11%	1.067	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: Idele according to SSP (for 1995 and 2000) and SPIE-BDNI

As of January 1	1995	2000	2015	2023	2024	2025
Dairy cows*	4.760	4.424	3.829	3.427	3.374	3.294
Suckler cows	3.983	4.071	3.988	3.564	3.500	3.425
Total head of cattle	20.507	20.216	19.182	16.722	16.438	15.723

\*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 Idele

Dairy cows			Suckler cows		
Regions	2015	2025	Regions	2015	2025
Bretagne	20%	20%	Nouvelle-Aquitaine	22%	22%
Normandie	16%	17%	Auvergne-Rhône-Alpes	16%	18%
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%	9%
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 Idele

Breed	2015	2025	Change in %: 2015/2025	% of total 2025
Prim'Holstein	2.469	2.036	-18%	30%
Charolaise	1.519	1.172	-23%	17%
Limousine	1.058	1.001	-5%	15%
Montbéliarde	647	550	-15%	8%
Blond d'Aquitaine	484	372	-23%	6%
Aubrac	181	251	+39%	4%
Normande	356	233	-35%	3%
Salers	211	196	-7%	3%
Crossbred*	599	585	-2%	9%
Other breeds	293	322	+10%	5%
Total	7.817	6.719	-14%	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-Idele according to SSP and French customs

	2014	2024		
	(1.000 head)	(1.000 head)	(1.000 tonnes cwe*)	% of large cattle
Cows	1.561	1.434	528	46%
Heifers	573	588	216	19%
Steers	180	128	50	4%
Bulls	1.030	851	356	31%
<b>Total large cattle</b>	<b>3.344</b>	<b>3.000</b>	<b>1.151</b>	<b>100%</b>
<b>Total veal</b>	<b>1.289</b>	<b>989</b>	<b>143</b>	

\*cwe : carcass-weight equivalent.

### AVERAGE ANNUAL PRODUCER PRICES

Source: Idele according to FranceAgriMer and INSEE

€/kg cwe	2014	2023	2024
Cow. R conformation	4.03	5.44	5.51
Cow. O conformation	3.34	4.80	4.61
Heifer. R conformation	4.16	5.49	5.55

€/kg cwe	2014	2023	2024
U Young Bull	3.96	5.41	5.48
R Young Bull	3.78	5.27	5.33
O Joung Bull	3.25	4.93	4.81

Evolution (%)	2024/2019	2024/2023
Mean annual prices for producers	+43%	=
Agricultural Means of Production Purchasing Price Index (IPAMPA) for beef meat	+23%	-4%

€/kg cwe	2014	2023	2024
Veal. O conformation. light rose coloured meat	5.90	7.10	7.21

### FRENCH TRADE IN BEEF, VEAL AND FINISHED CATTLE\*

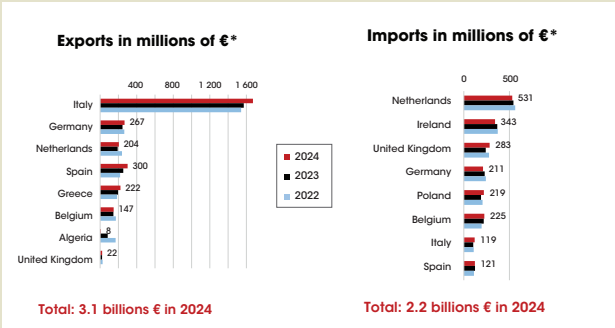
Source: GEB-Idele according to French customs

	2014	2021	2022	2023	2024	2024/ 2023	2024/ 2014
<b>Beef and veal imports (thousands of carcass tonnes)</b>	<b>358</b>	<b>314</b>	<b>383</b>	<b>360</b>	<b>359</b>	<b>=</b>	<b>=</b>
- of which fresh or chilled meat	248	194	234	227	227	=	-9%
- of which frozen meat	89	89	115	101	100	-1%	+12%
- of which meat preparations	21	31	34	32	32	+2%	+55%
<b>Beef meat exports (thousands of carcass tonnes)</b>	<b>231</b>	<b>250</b>	<b>245</b>	<b>217</b>	<b>242</b>	<b>+11%</b>	<b>+5%</b>
- of which fresh or chilled meat	192	192	189	171	185	+8%	-4%
- of which frozen meat	21	31	30	29	36	+25%	+68%
- of which meat preparations	18	27	26	18	22	+19%	+18%
<b>Export of live finished adult cattle (1.000 heads)</b>	<b>46</b>	<b>39</b>	<b>32</b>	<b>29</b>	<b>29</b>	<b>=</b>	<b>-37%</b>
- of which young bulls	41	29	21	18	19	+5%	-54%

\* Raw data, without correction for the Brexit effect.

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

Source: GEB-Idele according to French customs



\*Raw data. without correction for the Brexit effect.

**MEAT CONSUMPTION IN FRANCE**

Source: GEB-Idele according to SSP and French customs

	Total consumption (1.000 tonnes cwe*)		In kg cwe* per capita		Slaughtering/ Consumption (%)	
	2019	2024	2019	2024	2019	2024
Beef and veal	1,542	1,424	22.9	20.8	93%	91%
Pork	2,138	2,117	31.7	30.9	103%	99%
Poultry	1,903	2,178	28.3	31.8	89%	79%
Lamb and sheep meat	164	147	2.4	2.1	49%	47%
Goat meat	5	5	0.1	0.1	120%	119%
Horse meat	8	5	0.1	0.1	29%	24%

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

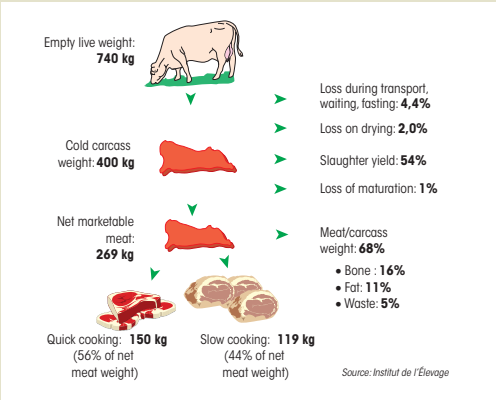
Source: GEB-Idele according to SSP

Beef, veal and live fattened cattle. in volume	2014	2022	2023	2024
Exports / Production* (%)	18%	19%	17%	19%
Imports / Consumption (%)	23%	26%	25%	26%

\*Including production of finished cattle exported live.

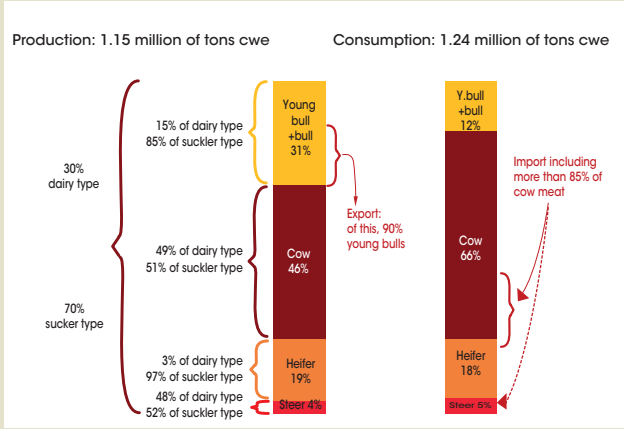
The weight of imports in consumption is given without correction for the value imported from the United Kingdom and immediately re-exported to the Netherlands since the implementation of *Brexit*. Taking into account this *Brexit* effect, the share of imported meat in consumption in 2022 would be reduced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

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

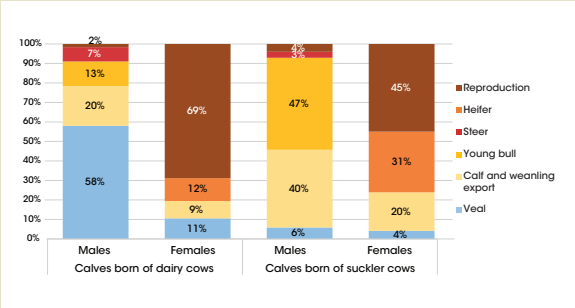


TYPE OF BEEF (EXCLUDING VEAL) PRODUCED AND CONSUMED IN FRANCE IN 2024

Source: GEB-Idele estimates. in % of the large cattle slaughtered (in tonnes cwe)



**INSTITUT DE L'ELEVAGE ESTIMATES OF THE CALVES' FINAL DESTINATION, FOR THOSE BORN IN 2023\***  
According to SPIE/BDNI and Normabev data in May 2025 (n+2) and Idele 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-Idele according to French customs

1.000 of head	2020	2021	2022	2023	2024
Weanlings exported *	1,142	1,149	1,068	996	940
- Of which: male	750	756	708	658	621
- Of which: female	392	393	360	338	319
Calves imported **	8	8	8	3	4
Calves exported ***	321	345	368	358	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-Idele according to FranceAgriMer

Males. €/kg live weight	2022	2023	2024
Charolais. U conformed. 450 kg live weight	3.19	3.40	3.78
Limousin E. 350 kg live weight	3.36	3.79	3.99

Females. €/kg live weight	2022	2023	2024
Charolaise. U conformed. 270 kg live weight	3.07	3.30	3.55
Limousine E. 270 kg live weight	3.15	3.34	3.65

MILK AND DAIRY PRODUCTS IN FRANCE

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

Source: GEB-Idele according to SSP & FAM. annual and monthly survey

	Milk deliveries (In millions of liters)			Number of milk suppliers		
	2014	2024	Change in %	2014	2024	Change in %
FRANCE	24,538	22,996	-6%	65,618	42,634	-35%
Bretagne	5,427	5,250	-3%	12,301	8,075	-34%
Normandie	3,741	3,860	+3%	9,344	5,821	-38%
Pays de la Loire	3,852	3,674	-5%	8,933	5,590	-37%
Auvergne-Rhône-Alpes	2,576	2,298	-11%	9,997	6,717	-33%
Grand-Est	2,324	2,276	-2%	5,213	3,480	-33%
Hauts-de-France	2,330	2,190	-6%	5,438	3,654	-33%
Bourgogne-Franche-Comté	1,592	1,590	=	4,651	3,793	-18%
Nouvelle-Aquitaine	1,319	845	-36%	3,620	1,700	-53%
Occitanie	855	562	-34%	3,214	1,582	-51%
Centre-Val de Loire	459	403	-12%	915	595	-35%

AVERAGE MILK YIELDS

Source: GEB-Idele and milk recordings

	Milk produced per dairy cow <sup>(1)</sup> (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
2003	6,050	65.5	2,740	7,400
2013	6,664	44.5	2,576	8,415
2023	7,660	26.0	1,964	8,938
2024	7,736	24.5	1,871	8,993

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

PRODUCTION AND CONSUMER PRICES

Source: Idele, SSP and INSEE

		2014	2019	2023	2024
€/1.000 liters	Standard-milk price	367	351	460	461
Base 100 in 2015	Milk price	116	111	146	146
	Agricultural means of production purchasing price index (IPAMPA) for cow's milk	102	104	135	129
	Consumer price index for milk and dairy products	101	104	117	120

\*Consumer price index.



PRODUCTION AND CONSUMPTION OF DAIRY PRODUCTS IN FRANCE

Source: GEB-Idele according to CNIEL and SSP

	2014			2024		
	Production*	Consumption**	Per capita consumption	Production*	Consumption**	Per capita consumption
	1.000 tonnes		kg	1.000 tonnes		kg
Drinking milk	3,564	3,424	51.8	2,760	2,695	39.4
Fresh yogurts and dairy desserts	2,246	1,899	28.7	1,977	1,763	25.8
Cheese (all species' milk)	1,796	1,457	22.0	1,770	1,614	23.6
Butter and dairy fat	445	554	8.4	401	522	7.6

\*Industrial

\*\*Including self-consumption and direct sales.

STRUCTURE OF FOREIGN TRADE IN DAIRY PRODUCTS\* IN 2023

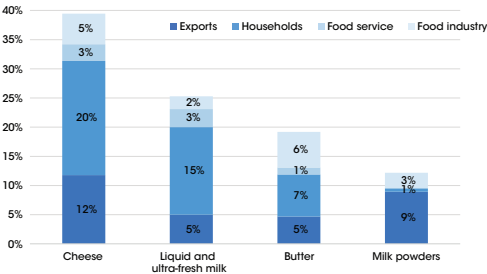
Source: GEB-Idele according to CNIEL

	Imports		Exports		Balance in million €
	Million €	%	Million €	%	
Cheese	2,911	47	3,953	43	+1,042
Milk powders	416	7	1,799	20	+1,383
Drinking milk	201	3	332	4	+131
Yogurts and fermented milks	205	3	610	7	+405
Cream for direct consumption	390	6	533	6	+143
Butter	1,542	25	872	10	-670
Other dairy products	510	8	1,049	11	+539
TOTAL dairy products	6,175	100	9,148	100	+2,973

\*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-Idele according to SSP, national Customs, IRI & GIRA



## BEEF AND DAIRY PRODUCTION IN EUROPE

### MILK PRODUCTION AND DELIVERIES IN EUROPE

Source: GEB-Idele according to Eurostat

Country	Dairy herds (in 1,000 head) as of Dec. 1st, 2024	Milk produced per dairy cow in 2024 (in kg/year)*	Estimated milk production in 2024	Milk deliveries in 2024	Share in EU milk deliveries 2024 (%)
			1,000 tonnes		
Germany	3,589	9,255	33,791	31,246	22
France	3,075	7,736	24,134	23,686	16
Poland	1,960	7,623	16,022	13,475	9
Netherlands	1,527	9,352	14,397	13,621	9
Italy	1,764	7,416	13,246	13,099	9
Ireland	1,481	5,807	8,687	8,666	6
Spain	774	9,821	7,658	7,421	5
Denmark	543	10,422	5,678	5,676	4
EU 27	19,222	7,929	155,137	144,452	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 2023 (KG PER CAPITA)

Source: FIL

Country	Liquid milks and dairy drinks	Butter	Cheeses
France	41.9	8.2	27.7
Germany	45.8	5.6	23.7
Denmark	65.8	6.6	25.3
Italy	45.3	2.1	21.1
Spain	61.5	0.3	7.4
Poland	49.5	5.5	20.3
Netherlands	37.6	1.7	25.3
Belgium	39.5	1.4	14.4
EU 27	48.3	4.0	20.2

### PRODUCTION AND CONSUMPTION OF BEEF AND VEAL IN 2024 IN THE EUROPEAN UNION

Source: GEB-Idele according to SPIE-BDNI, SSP and national Customs

Country	National cow herd (1.000 head) on Dec. the 1st, 2024	Controlled slaughtering		Consumption	
		in 1.000 tonnes cwe*	% of EU-27 production	in 1.000 tonnes cwe*	in kg cwe* per capita
France	6,719	1,299	20	1,424	20.9
Germany	4,210	1,009	15	1,085	13.0
Spain	2,803	718	11	648	13.3
Italy	2,224	659	10	935	15.9
Ireland	2,249	603	9	86	16.0
Poland	2,102	637	10	142	3.9
Netherlands	1,564	433	7	288	16.1
Belgium	862	249	4	164	13.9
EU 27	29,331	6,584	100	6,371	14.2

\*cwe : carcasse-weight equivalent.

BEEF AND DAIRY PRODUCTION IN THE WORLD

MAIN CATTLE HERDS IN 2024 (MILLIONS OF HEAD)

Source: GEB-Idele 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	131	EU 27	72	20
Brazil	193	16	Argentina	52	1
China	104	14	Australia	31	1
USA	87	9	Russia	17	6

DAIRY PRODUCTS' TRADE IN 2024 (IN MILLION TONNES OF MILK EQUIVALENT)

Source: GEB-Idele according to FAO. FIL and national Customs

	Exports	Imports	Production	Consumption	"Consum. / capita (kg / capita)"
EU 27	27.3	3.2	160.6	136.5	303
New Zealand	20.3	0.2	21.5	1.5	279
USA	13.2	3.3	102.5	92.6	272
United Kingdom	3.0	3.6	15.5	16.2	234
Australia	2.9	1.3	8.7	7.0	259
Argentina	2.2	0.0	10.9	8.7	191
Ukraine	0.5	0.2	7.2	7.0	184
Russia	0.5	3.6	34.1	37.2	259
India	0.3	0.2	212.7	33.0	23
China	0.2	10.5	41.9	52.2	37
Mexico	0.2	3.9	14.1	17.9	137
Brazil	0.1	1.9	38.2	39.9	188

INTERNATIONAL TRADE OF BEEF IN 2024 (THOUSANDS OF TONNES CWE\*)

Source: GEB-Idele according to various sources (USDA. MLA. CONAB and national Customs)

	Exports	Imports	Production	Consumption	Consumption / capita.in.kg. cwe*
Brazil	3,435	54	10,900	7,519	35.4
Australia	1,817	15	2,571	769	28.4
India	1,457	0	4,565	3,108	2.1
USA	1,261	2,002	12,292	13,033	38.3
Argentina	981	3	2,900	1,922	40.8
EU.27	630	405	6,465	6,240	13.9
New Zealand	615	11	719	115	21.6
Canada	537	254	1,310	1,027	24.9
China + Hong Kong	33	3,527	7,790	11,284	8.0
Japan	14	692	461	1,139	9.2
South Korea	0	554	360	914	17.7

\*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 - 655 M€ in 2025 (689 M€ in 2024)

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.

*In order to avoid possible effects on the market, a change took place in 2025: cull cows, sold for slaughter within 6 months between the declaration and the reference date (and 6 months after the reference date of the previous year), therefore during the compulsory detention period, are eligible for support.*

**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 estimated for 2025 and reminder of payments for 2023 to 2024

CAP 2023-2027		Amounts paid in 2023	Amounts paid in 2024	Estimated amounts for 2025
Bovine coupled support (€/LU)	High level	110€	107.01€	104€
	Standard level	60€	58.37€	56€
Coupled support for suckler calves production with quality Label (€/animal)		65.67€	68.70€	60€

<sup>1</sup> 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.

