

THE KEY DATA
OF IDELE



French cattle 2026

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)	2015	2024	2025
Suckler and dairy holders	193	144	140
- <i>having less than 8 LU (Livestock Units) and <5 cows</i>	36	25	25
Suckler and dairy holders (> 8 LU and > 5 cows)	157	119	115
- <i>of these : dairy* (> 10 dairy cows)</i>	65	45	43
- <i>of these : suckler (> 20 suckler cows)</i>	61	50	49

*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%
- <i>of these: 55 years old or more</i>	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 2025 (thousands)	Number of farmers	% of the total	Number of cows	% of the total
10-49 dairy cows	14	32%	437	14%
50-69 dairy cows	10	23%	589	19%
70-99 dairy cows	10	23%	823	26%
100-149 dairy cows	7	17%	884	28%
150 dairy cows or more	2	5%	446	14%

*Barn with more than 8 LU (Livestock Units) 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 2025 (thousands)	Number of farmers	% of the total	Number of cows	% of the total
5-19 suckler cows	20	30%	247	7%
20-49 suckler cows	24	34%	789	24%
50-69 suckler cows	9	13%	552	17%
70-99 suckler cows	8	12%	685	21%
100 suckler cows or more	7	11%	1,050	32%

*Barn with more than 8 LU (Livestock Units) 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	2016	2024	2025	2026
Dairy cows*	4,760	4,424	3,796	3,374	3,294	3,208
Suckler cows	3,983	4,071	4,048	3,500	3,426	3,372
Total head of cattle	20,507	20,216	19,310	16,548	16,100	15,480

*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	2016	2026	Regions	2016	2026
Bretagne	20%	20%	Nouvelle-Aquitaine	22%	21%
Normandie	16%	17%	Auvergne-Rhône-Alpes	16%	18%
Pays de la Loire	14%	14%	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	5%	6%
Nouvelle-Aquitaine	6%	4%	Centre-Val de Loire	5%	5%

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

Source: SPIE-BDNI. processed by Idele

Breed	2016	2026	Change in %: 2016/2026	% of total 2026
Prim'Holstein	2,444	1,978	-19%	30%
Charolaise	1,527	1,137	-26%	17%
Limousine	1,088	992	-9%	15%
Montbéliarde	640	533	-17%	8%
Blond d'Aquitaine	493	359	-27%	5%
Aubrac	190	262	+38%	4%
Normande	341	220	-36 %	3 %
Salers	215	194	-10%	3%
Crossbred*	609	585	-4%	9%
Other breeds	298	322	+8%	5%
Total	7,845	6,581	-16%	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

	2015	2025		
	(1,000 head)	(1,000 head)	(1,000 tonnes cwe*)	% of large cattle
Cows	1,614	1,400	521	46%
Heifers	581	579	214	19%
Steers	184	139	55	5%
Bulls	1,025	804	344	30%
Total large cattle	3,404	2,922	1,134	100%
Total veal	1,267	905	132	

*cwe : carcass-weight equivalent.

AVERAGE ANNUAL PRODUCER PRICES

Source: Idele according to FranceAgriMer and INSEE

€/kg cwe	2015	2024	2025
Cow. R conformation	3.97	5.51	6.59
Cow. O conformation	3.25	4.61	5.93
Heifer. R conformation	4.70	5.55	6.97

€/kg cwe	2015	2024	2025
U Young Bull	3.93	5.48	6.72
R Young Bull	3.75	5.33	6.55
O Young Bull	3.30	4.81	5.99

Evolution (%)	2025/2020	2025/2024
Mean annual prices for producers	+75%	+23%
Agricultural Means of Production Purchasing Price Index (IPAMPA) for beef meat	+19%	-1%

€/kg cwe	2015	2024	2025
Veal. O conformation. light rose coloured meat	5.54	7.21	7.97

FRENCH TRADE IN BEEF, VEAL AND FINISHED CATTLE*

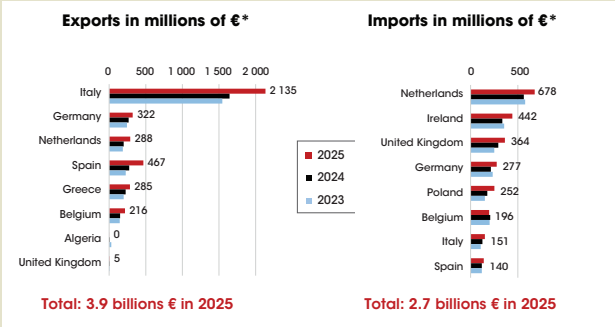
Source: GEB-Idele according to French customs

	2015	2022	2023	2024	2025	2025/ 2024	2025/ 2015
Beef and veal imports (thousands of carcass tonnes)	340	383	360	359	355	-1%	+4%
- of which fresh or chilled meat	228	234	227	227	211	-7%	-7%
- of which frozen meat	91	115	101	100	111	+11%	+22%
- of which meat preparations	21	34	32	32	33	+3%	+60%
Beef meat exports (thousands of carcass tonnes)	239	245	217	242	241	=	+1%
- of which fresh or chilled meat	195	189	171	185	183	-1%	-6%
- of which frozen meat	21	30	29	36	38	+6%	+79%
- of which meat preparations	23	26	18	22	20	-6%	-10%
Export of live finished adult cattle (1.000 heads)	48	31	28	28	23	-17%	-52%
- of which young bulls	46	21	18	19	15	-21%	-68%

* 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 (%)	
	2020	2025	2020	2025	2020	2025
Poultry	1,897	2,183	28.1	31.6	88%	77%
Pork	2,118	2,175	31.3	31.5	104%	97%
Beef and veal	1,496	1,385	22.1	20.1	96%	91%
Lamb and sheep meat	155	136	2.3	2.0	52%	49%
Goat meat	5	5	0.1	0.1	113%	118%
Horse meat	6	4	0.1	0.1	31%	31%

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

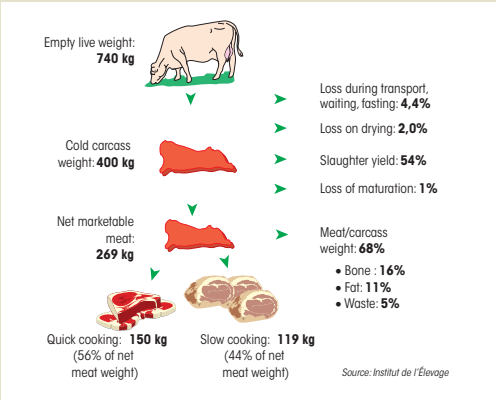
Source: GEB-Idele according to SSP

Beef, veal and live fattened cattle. in volume	2015	2023	2024	2025
Exports / Production* (%)	17%	17%	19%	19%
Imports / Consumption (%)	22%	25%	26%	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

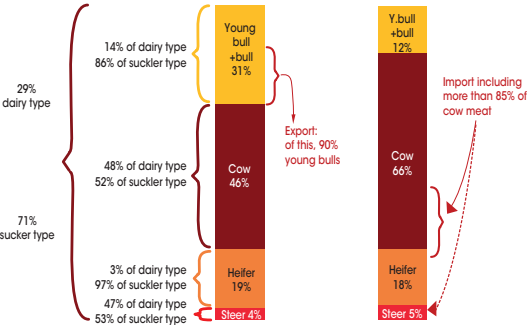


TYPE OF BEEF (EXCLUDING VEAL) PRODUCED AND CONSUMED IN FRANCE IN 2025

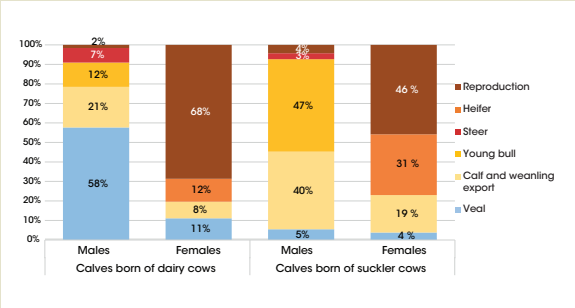
Source: GEB-Idele estimates. in % of the large cattle slaughtered (in tonnes cwe)

Production: 1.13 million of tons cwe

Consumption: 1.22 million of tons cwe



INSTITUT DE L'ELEVAGE ESTIMATES OF THE CALVES' FINAL DESTINATION, FOR THOSE BORN IN 2024*
According to SPIE/BDNI and Normabev data in May 2026 (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	2021	2022	2023	2024	2025
Weanlings exported *	1,151	1,070	1,000	947	917
- Of which: male	757	710	660	625	611
- Of which: female	394	361	339	321	306
Calves imported **	8	8	2	4	3
Calves exported ***	345	369	360	359	325

*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	2023	2024	2025
Charolais. U conformed. 450 kg live weight	3.40	3.70	5.16
Limousin E. 350 kg live weight	3.79	3.99	5.31

Females. €/kg live weight	2023	2024	2025
Charolaise. U conformed. 270 kg live weight	3.30	3.55	4.88
Limousine E. 270 kg live weight	3.34	3.65	4.95

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		
	2015	2025	Change in %	2015	2025	Change in %
FRANCE	24,386	23,459	-4%	59,948	39,845	-34%
Bretagne	5,240	5,422	+3%	11,525	7,862	-32%
Normandie	3,748	3,960	+6%	8,484	5,675	-33%
Pays de la Loire	3,889	3,674	-6%	8,287	5,379	-35%
Auvergne-Rhône-Alpes	2,574	2,392	-7%	9,723	6,462	-34%
Hauts-de-France	2,342	2,225	-5%	5,262	3,538	-33%
Grand-Est	2,339	2,231	-5%	5,025	3,367	-33%
Bourgogne-Franche-Comté	1,608	1,613	=	4,594	3,728	-19%
Nouvelle-Aquitaine	1,289	844	-35%	3,141	1,617	-49%
Occitanie	836	586	-30%	2,813	1,518	-46%
Centre-Val de Loire	459	403	-12%	881	573	-35%

AVERAGE MILK YIELDS

Source: GEB-Idele 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
2005	6,070	62.2	2,651	7,737
2015	7,018	41.8	2,601	8,518
2024	7,736	24.5	1,871	8,993
2025	7,736	23.1	1,777	9,156

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

PRODUCTION AND CONSUMER PRICES

Source: Idele, SSP and INSEE

		2015	2020	2024	2025
€/1.000 liters	Standard-milk price	316	348	461	487
Base 100 in 2020	Milk price	91	100	132	140
	Agricultural means of production purchasing price index (IPAMPA) for cow's milk	97	100	124	122
	Consumer price index for milk and dairy products	96	100	114	115

*Consumer price index.

PRODUCTION AND CONSUMPTION OF DAIRY PRODUCTS IN FRANCE

Source: GEB-Idele according to CNIEL and SSP

	2015			2025		
	Production*	Consumption**	Per capita consumption	Production*	Consumption**	Per capita consumption
	1.000 tonnes		kg	1.000 tonnes		kg
Drinking milk	3,471	3,365	50.7	2,618	2,551	37.2
Fresh yogurts and dairy desserts	2,208	1,889	28.4	1,949	1,718	25.0
Cheese (all species' milk)	1,815	1,468	22.1	1,823	1,661	24.2
Butter and dairy fat	446	541	8.1	422	563	8.2

*Industrial

**Including self-consumption and direct sales.

STRUCTURE OF FOREIGN TRADE IN DAIRY PRODUCTS* IN 2025

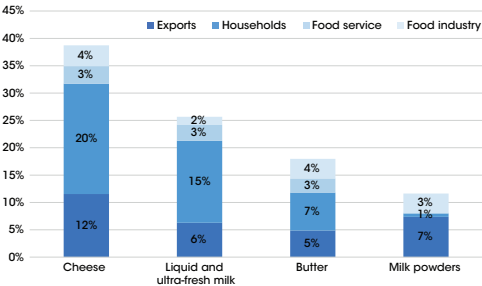
Source: GEB-Idele according to CNIEL

	Imports		Exports		Balance in million €
	Million €	%	Million €	%	
Cheese	3,274	47	4,123	43	+849
Drinking milk	221	3	330	3	+109
Yogurts and fermented milks	236	3	635	7	+399
Cream for direct consumption	442	6	509	5	+67
Butter	1,846	26	964	10	-882
Milk powders	473	7	1,881	20	+1,408
Other dairy products	544	8	1,093	11	+549
TOTAL dairy products	7,036	100	9,535	100	+2,499

*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 2023
(% OF DRY MILK SOLIDS)

Source: GEB-Idele according to SSP, national Customs, Circana & 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, 2025	Milk produced per dairy cow in 2025 (in kg/year) *	Estimated milk production in 2025	Milk deliveries in 2025	Share in EU milk deliveries 2025 (%)
			1.000 tonnes		
Germany	3,597	9,518	34,199	31,636	21
France	2,984	8,163	24,731	24,201	16
Netherlands	1,518	9,633	14,667	13,924	9
Poland	1,946	8,406	16,417	13,792	9
Italy	1,702	7,815	13,543	13,455	9
Ireland	1,490	6,145	9,130	9,098	6
Spain	761	9,855	7,565	7,410	5
Denmark	548	10,535	5,747	5,733	4
EU 27	19,015	8,317	159,016	147,245	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 2024 (KG PER CAPITA)

Source: FIL

Country	Liquid milks and dairy drinks	Butter	Cheeses
France	41.7	7.7	27.8
Germany	45.6	5.3	25.1
Denmark	64.1	6.7	26.6
Italy	46.6	2.6	19.7
Spain	69.4	1.4	17.1
Poland	49.5	5.7	21.3
Netherlands	38.3	1.8	25.0
Belgium	40.7	1.5	14.4
EU 27	49.1	4.1	21.6

PRODUCTION AND CONSUMPTION OF BEEF AND VEAL IN 2025 IN THE EUROPEAN UNION

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

Country	National cow herd (1.000 head) on Dec. the 1st, 2025	Controlled slaughtering		Consumption	
		in 1.000 tonnes cwe*	% of EU-27 production	in 1.000 tonnes cwe*	in kg cwe* per capita
France	6,581	1,266	20	1,385	20.1
Germany	4,215	949	15	1,132	13.5
Spain	2,763	706	11	662	13.5
Italy	2,232	668	11	907	15.4
Ireland	2,249	544	9	68	12.5
Poland	2,091	624	10	137	3.7
Netherlands	1,560	393	6	276	15.3
Belgium	853	229	4	170	14.3
EU 27	29,081	6,310	100	6,192	13.7

*cwe : carcasse-weight equivalent.

BEEF AND DAIRY PRODUCTION IN THE WORLD

MAIN CATTLE HERDS IN 2025 (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	133	EU 27	72	19
Brazil	197	15	Argentina	51	1
China	96	13	Australia	10	1
USA	86	10	Russia	17	7

DAIRY PRODUCTS' TRADE IN 2025 (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	25.6	3.4	164.2	142.1	316
New Zealand	19.7	0.3	21.9	2.6	479
USA	13.4	3.2	105.1	94.9	278
United Kingdom	3.7	3.8	16.3	16.3	235
Australia	2.8	1.3	8.5	7.0	253
Argentina	2.4	0.1	12.0	9.7	211
Uruguay	1.6	0.0	2.2	0.6	14
China	0.8	10.6	40.9	50.7	36
India	0.6	0.2	216.5	33.0	23
Russia	0.5	1.5	34.3	35.4	246
Mexico	0.4	4.6	14.2	18.5	140
Brazil	0.2	1.8	37.9	39.5	185

INTERNATIONAL TRADE OF BEEF IN 2025 (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	4,145	42	11,100	6,997	32.9
Australia	2,114	16	2,885	786	29.0
India	1,614	0	4,635	3,021	2.1
USA	1,086	2,262	11,837	13,013	38.3
Argentina	910	23	3,143	2,256	47.9
New Zealand	570	19	674	123	23.0
EU.27	551	436	6,310	6,195	13.8
Canada	534	290	1,260	1,016	24.6
China + Hong Kong	17	3,797	8,010	11,790	8.4
Japan	16	659	455	1,098	8.9
South Korea	0	566	335	901	17.4

*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 - 635 M€ in 2026 (653 M€ in 2025)

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" capping).

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 2026 and reminder of payments from previous years

CAP 2023-2027		Amounts paid in 2023	Amounts paid in 2024	Amounts paid in 2025	Estimated amounts for 2026
Bovine coupled support (€/LU)	High level	110 €	107.01 €	104.85 €	101 €
	Standard level	60 €	58.37 €	57.05 €	55 €
Coupled support for suckler calves production with quality Label (€/animal)		65.67 €	68.70 €	66.94 €	59 €

*Based on the French PSN (April 2025 update).

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.