Agriculture and fisheries

Authors: Rodrigo ATAIDE DIAS, Garry MAHON, Giovanni DORE

eurostat
Statistics in focus
49/2008

EU cattle population in December 2007 and production forecasts for 2008

The total cattle population increased slightly in 2007 relative to 2006 (+0.3%). This may be seen in the light of the downward trend recorded since the 1980s. Regarding bovine meat production, there was a rise in tonnes in 2007. A slight fall in number of cattle slaughtered was more than compensated by a rise in average carcass weight. For the main producing Member States, bovine meat production is expected to increase in 2008 and fall moderately in the first half of 2009. Concerning trade, imports exceeded exports, continuing the trend since 2003. The principal origin of imports was Brazil and the main destination for exports was Russia. Although the average carcass price decreased slightly from 2006 to 2007, prices have more recently been relatively high mainly due to the tight supply situation.

Background

This publication presents information on the EU bovine production, its development in recent years and production forecasts. The data published are derived not only from the November/December 2007 statistical surveys on the bovine livestock and monthly cattle slaughter carried out by the EU Member States, but also from Comext (external trade data). The bovine production data comprise: (i) surveys of the bovine population broken down by animal categories: (ii) bovine slaughtering statistics; and (iii) bovine production forecasts expressed as the gross indigenous production (GIP) which includes all bovine animals slaughtered plus the balance of intra-Community and external trade in live bovine animals. The current legal framework on bovine production statistics is Council Directive 93/24/EEC and Commission Decision 2004/761/EC.

In brief

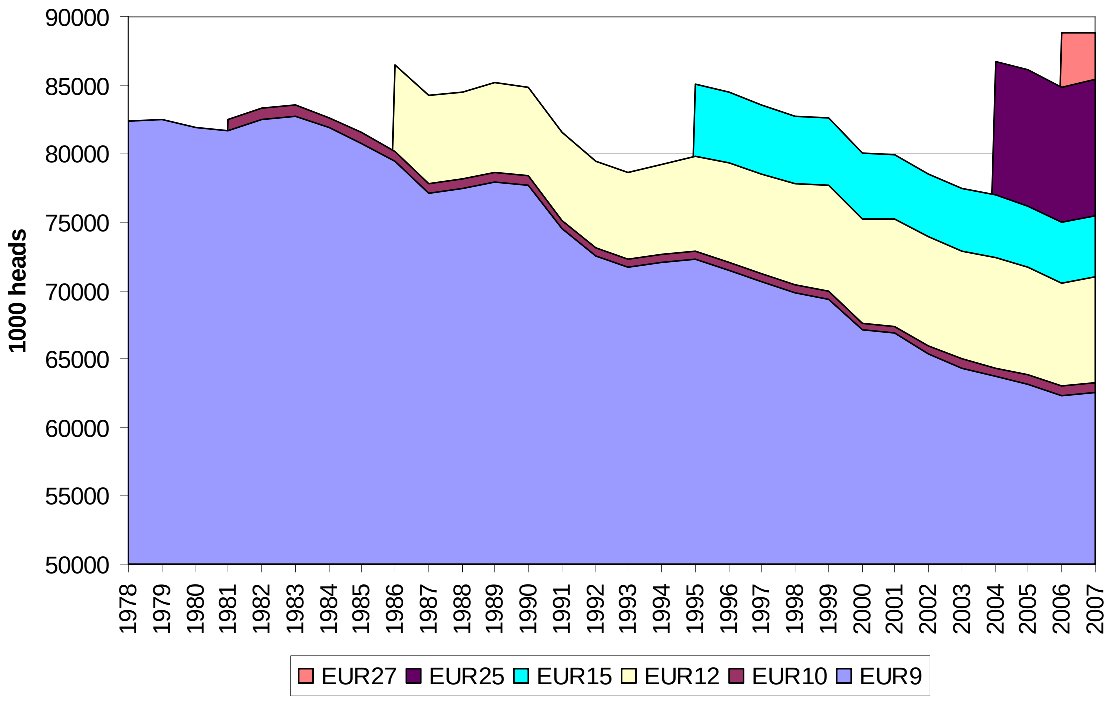
- A slight rise (+0.3%) in the total EU-27 cattle population from 2006 to 2007 was observed.
- From 2006 to 2007, beef and veal production in tonnes increased (+0.6%). The number of cattle slaughtered decreased (-1.6%), while the average carcass weight increased.
- For the main producing Member States, bovine meat production is expected to increase in 2008 and fall moderately in the first half of 2009.
- The main imports of beef and live animals come from Brazil while Russia is by far the major export destination for EU beef and cattle.
- Average carcass prices in 2008 are estimated to be relatively high due to the tight supply.

eurostat
EUROPEAN COMMISSION

Bovine population

Since 1980s, there has been a declining trend in the EU total cattle population, which stabilised (+0.3%) from 2006 to 2007. However, the numbers of bovines of 1 to 2 years old, dairy cows and other (suckler) cows have decreased by 4.7%, 0.7% and 0.2% respectively.

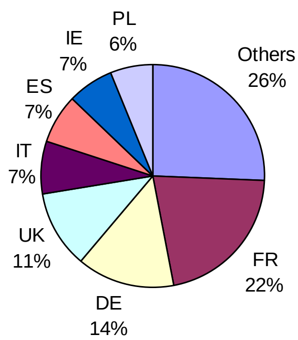
Figure 1: Trend in the EU total cattle population



Source: Eurostat

Across Member States, France, Germany and the United Kingdom contribute with almost half (47%) of the total EU cattle population.

Figure 2: Cattle population by Member State



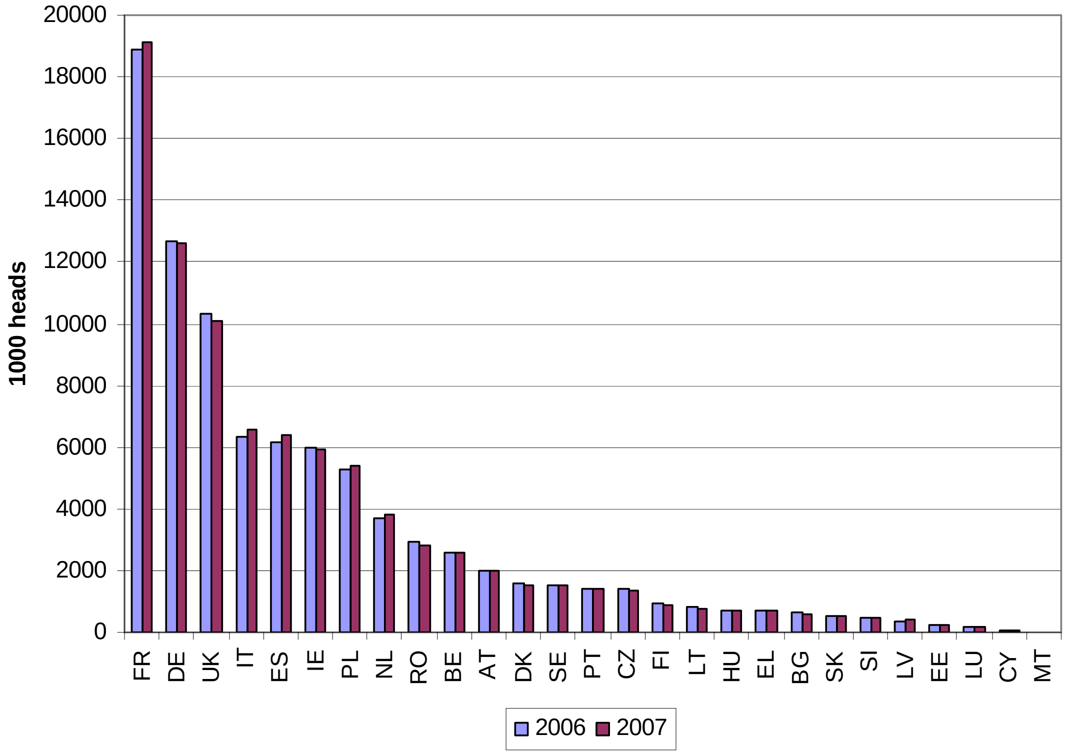
Source: Eurostat

Concerning the trend in the total number of bovines by Member State (Table 1), from 2006 to 2007 the highest increases were registered in Latvia (+5.7%), Slovenia (+5.6%), the Netherlands (+4.0%) and Italy (+3.7%). On the other hand Lithuania (-6.1%), Bulgaria (-4.0%) and Romania (-3.9%) showed the sharpest decreases.

In Latvia the number of breeding cattle (for meat production), in particular females of all age groups, increased significantly (+59.9%). This also happened in Estonia (+45.8%), Poland (+30.9%) and the Netherlands (+23.6%). In the Netherlands, the relatively high increase in cattle numbers is mainly due to the decrease of the cow herd and the subsequently import of calves by specialised cattle fattening farmers. Imports of calves, bulls and bullocks have also exceeded exports in Italy.

In Romania and Bulgaria, all bovine categories decreased with the exception of "other cows", i.e. suckler cows.

Figure 3: Total cattle population by Member State



Source: Eurostat

Table 1: Cattle numbers (in thousand heads) by category

	EU bovine population													
	Total		<1 year		1-2 years		>2 years		Cows		Dairy cows		Other cows	
	2007	%var.	2007	%var.	2007	%var.	2007	%var.	2007	%var.	2007	%var.	2007	%var.
BE	2573.4	-1.29%	710.9	1.09%	508.4	-2.42%	1354.0	-2.07%	1034.7	-2.10%	524.3	-1.43%	510.4	-2.78%
BG	611.0	-4.01%	167.0	-7.94%	54.4	-1.73%	380.6	-2.77%	349.9	-3.15%	335.9	-4.07%	14.0	26.08%
CZ	1366.7	-1.65%	407.8	-1.67%	315.3	-1.39%	643.6	-1.76%	559.3	-1.51%	407.4	-2.38%	151.9	0.95%
DK	1545.0	-2.15%	507.0	-5.41%	294.0	-1.34%	743.0	-0.27%	656.0	0.31%	551.0	-0.72%	105.0	6.06%
DE	12608.5	-0.54%	3949.8	0.70%	2950.2	-1.46%	5708.5	-0.90%	4789.2	-0.15%	4064.4	0.25%	724.9	-2.33%
EE	242.0	-1.22%	64.6	-1.82%	51.2	-0.58%	126.2	-1.17%	112.7	-1.83%	104.1	-4.41%	8.6	45.76%
IE	5902.2	-1.66%	1633.4	-0.15%	1311.4	-3.14%	2957.4	-1.81%	2204.9	-0.50%	1087.5	0.04%	1117.4	-1.01%
EL	682.0	-0.10%	194.0	1.54%	133.0	5.49%	355.0	-2.88%	295.0	-3.65%	150.0	-10.58%	145.0	4.75%
ES	6409.5	3.65%	2402.4	7.54%	766.7	1.82%	3240.4	1.39%	2862.0	3.17%	903.0	-4.14%	1959.0	6.93%
FR	19123.8	1.17%	5070.3	1.18%	3610.7	1.94%	10442.8	0.91%	7921.1	0.57%	3758.5	-1.07%	4162.6	2.10%
IT	6577.0	3.74%	1929.0	-0.96%	1436.0	2.45%	2918.0	5.72%	2280.0	2.11%	1839.0	1.39%	441.0	5.23%
CY	55.9	-0.34%	20.4	0.25%	10.2	-12.05%	25.3	4.89%	23.7	-0.96%	23.7	-0.96%	0.0	-
LV	398.7	5.73%	114.9	6.92%	72.5	15.27%	211.4	2.22%	195.6	1.95%	180.4	-1.07%	15.2	59.94%
LT	787.9	-6.07%	185.5	-16.21%	146.9	-8.36%	455.5	-0.35%	414.8	0.95%	404.5	1.38%	10.3	-13.45%
LU	193.1	3.67%	53.0	3.59%	43.9	5.26%	96.3	3.00%	73.3	-1.74%	40.2	-12.99%	33.1	16.57%
HU	705.0	0.43%	190.0	-0.52%	150.0	0.00%	365.0	0.83%	323.0	0.31%	266.0	-0.75%	57.0	7.55%
MT	19.4	1.67%	5.3	-0.75%	5.0	-1.97%	9.2	5.29%	7.8	1.70%	7.6	1.34%	0.2	21.05%
NL	3820.0	4.00%	1505.0	5.69%	620.0	0.00%	1695.0	4.05%	1555.0	2.64%	1490.0	3.26%	89.0	23.61%
AT	2000.2	-0.14%	634.1	0.41%	437.1	0.48%	929.1	-0.78%	795.8	-0.36%	524.5	-0.55%	271.3	0.01%
PL	5405.6	2.36%	1344.4	6.90%	1052.8	1.96%	3008.3	0.59%	2738.6	2.04%	2677.3	1.53%	61.3	30.86%
PT	1426.2	1.35%	386.5	2.95%	218.6	1.48%	821.2	0.58%	722.0	0.53%	304.5	-0.90%	417.6	1.60%
RO	2819.0	-3.91%	714.3	-3.61%	277.2	-0.90%	1795.3	-4.11%	1603.5	-3.70%	1572.9	-4.05%	30.6	18.70%
SI	479.5	5.62%	149.4	9.37%	125.2	3.62%	204.9	4.24%	177.6	2.65%	117.2	4.14%	60.4	-0.12%
SK	501.8	-1.18%	146.2	-2.97%	103.2	2.00%	252.5	-1.38%	215.7	-1.37%	180.2	-2.56%	35.5	5.19%
FI	902.7	-2.84%	303.9	-3.02%	228.2	-4.06%	370.6	-1.92%	332.1	-1.91%	296.1	-4.31%	44.6	11.23%
SE	1516.7	0.05%	494.9	-0.10%	364.4	1.24%	668.3	1.18%	548.5	-0.57%	365.7	-4.93%	182.7	9.47%
UK	10078.0	-2.49%	2846.0	-3.13%	2455.0	-2.58%	4777.0	-2.05%	3643.0	-2.07%	1978.0	-1.35%	1665.0	-2.92%

%var: percent variation, 2007 compared to 2006

Source: Eurostat

Production of bovine meat

The total number of bovine animals slaughtered in the EU-27 decreased (-1.6%) from 2006 to 2007, while bovine animals slaughtered in the NMS-10 increased (+3.5%). This is partially explained by the sharp decrease (-6.6%) and remarkable increase (+32.6%) in the number of calves slaughtered in the EU-27 and NMS-10 respectively.

The Member States that registered more marked declines of bovines slaughtered in 2007 compared with 2006 are Bulgaria (-81.6%) and Portugal (-14.7%). On the other hand, the highest growth in slaughtered bovine animals was observed in Romania (+8.2%) and Slovakia (+7.0%).

Table 2: Slaughtered bovines (in heads) by animal category

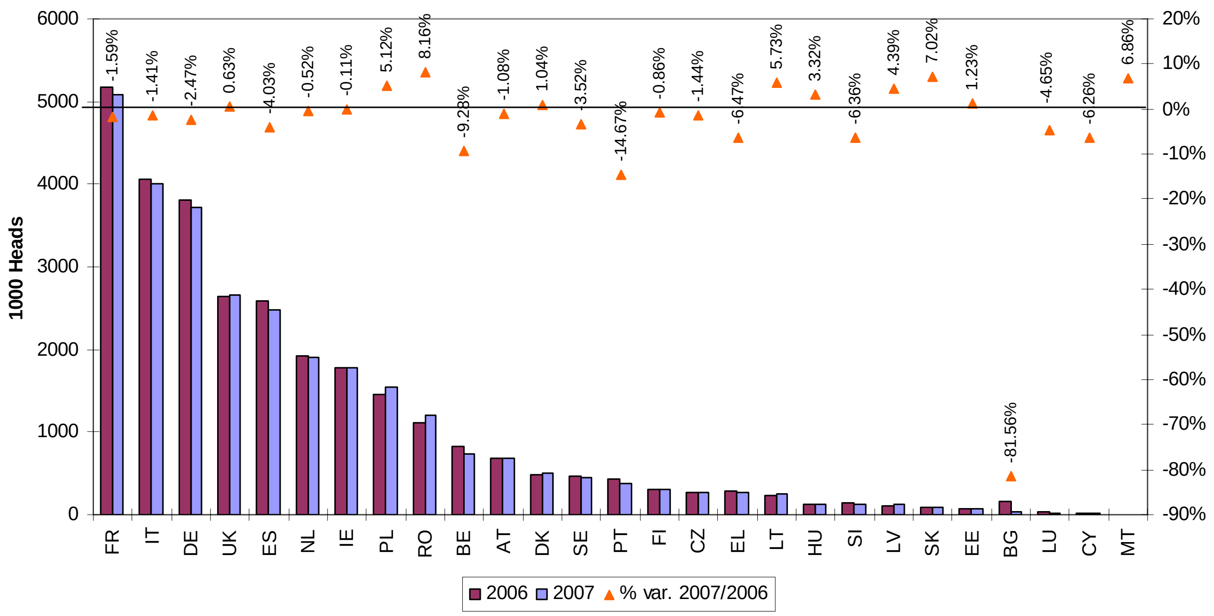
1000 HEADS		EU27	EU15	NMS-10	NMS-2
Bulls	2006	8582.6	2260.47	1011.4	34.4
	2007	8737.5	2219.40	1045.7	28.2
	% var.	1.80%	-1.82%	3.39%	-18.09%
Bullocks	2006	2276.1	7536.76	3.2	12.5
	2007	2236.0	7664.45	2.6	14.1
	% var.	-1.76%	1.69%	-19.26%	13.45%
Cows	2006	7643.9	6329.89	894.7	419.3
	2007	7528.1	6110.32	884.6	534.0
	% var.	-1.51%	-3.47%	-1.13%	27.33%
Heifers	2006	4366.3	3989.60	369.5	7.2
	2007	4264.9	3900.20	355.4	9.1
	% var.	-2.32%	-2.24%	-3.80%	26.07%
Calves	2006	6390.6	5334.42	249.3	806.8
	2007	5968.5	4983.71	330.5	654.3
	% var.	-6.61%	-6.57%	32.56%	-18.90%
Total	2006	29267.7	25459.27	2528.1	1280.3
	2007	28800.8	24945.20	2617.5	1239.7
	% var.	-1.60%	-2.02%	3.53%	-3.17%

Source: Eurostat

In Portugal, the reduction of slaughtered animals was due to the severe drought that occurred in 2005, which had consequences on the bovine production cycle of 2006 resulting in a lack of animals for slaughter (mainly calves and bullocks) and a drop in production. Despite the improved weather conditions in 2007, and a slight recovery in the second semester of the year, a significant fall in bovine slaughterings was also confirmed for 2007.

In Bulgaria, the 2007 figure refers to slaughtering in slaughterhouses, whereas the 2006 figure includes domestic and small scale commercial slaughtering.

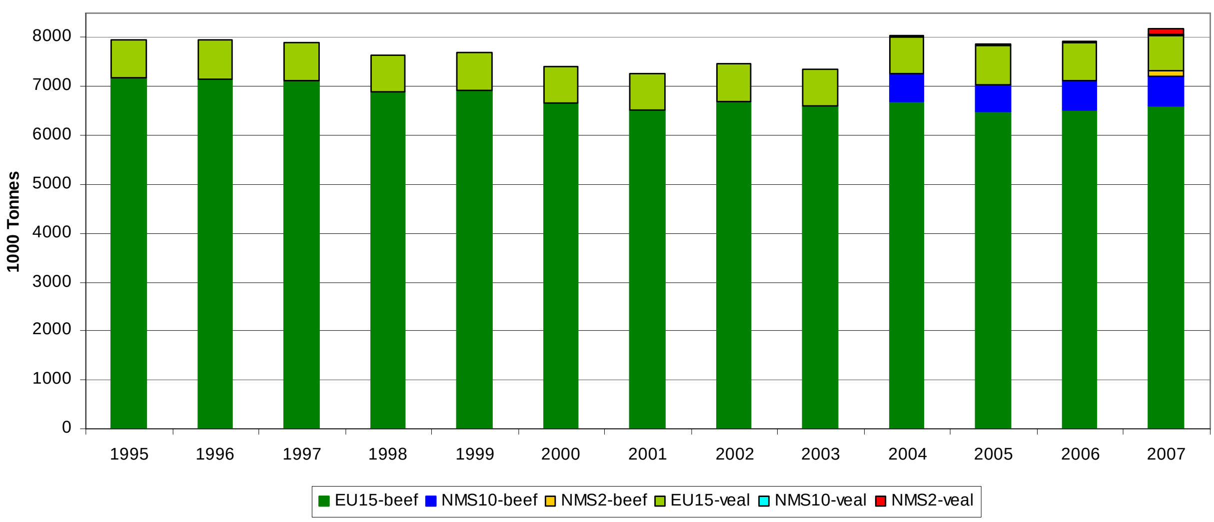
Figure 4: Slaughtered bovines (variation 2006/2007 in % of heads) per Member State



Source: Eurostat

From 2006 to 2007 (Figure 5), beef production in tonnes increased moderately by 1.1% and 2.3% in the EU-15 and NMS-10 respectively. On the other hand, veal production decreased sharply (-6.1%) in the EU-15 and increased significantly (+45%) in the NMS-10. Concerning the total bovines slaughtered in tonnes, the EU-27 production increased slightly (+0.6%) from 2006 to 2007.

Figure 5: Trend in EU beef and veal production in tonnes



Source: Eurostat

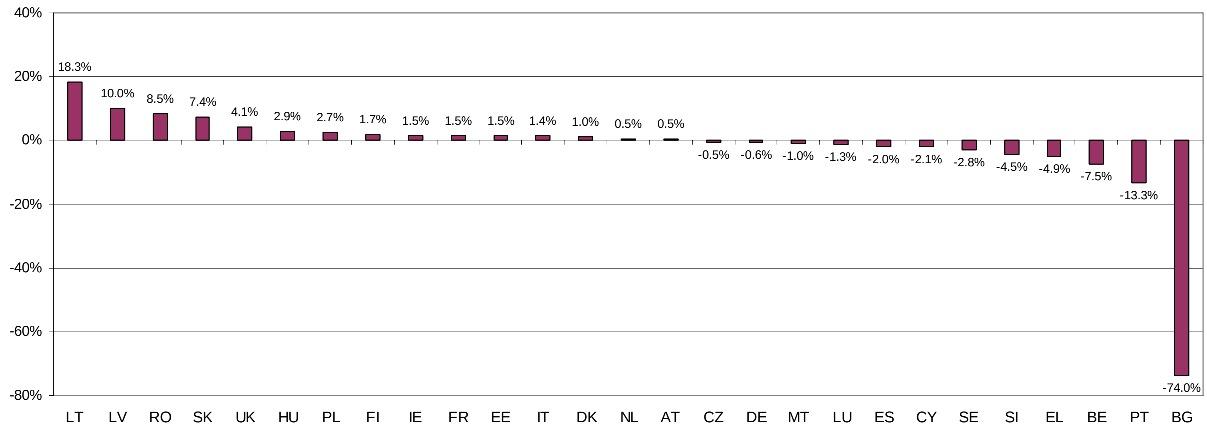
Table 3: Slaughtered bovines (in tonnes) by animal category

1000 TONS		EU-27	EU-15	NMS-10	NMS-2
Bulls	2006	2886.8	2597.0	284.9	4.9
	2007	3009.0	2696.5	305.3	7.1
	% var.	4.23%	3.83%	7.19%	44.34%
Bullocks	2006	803.2	797.5	0.9	4.9
	2007	807.2	804.0	0.9	2.4
	% var.	0.50%	0.82%	-1.38%	-50.27%
Cows	2006	2305.2	2001.3	232.0	71.9
	2007	2282.9	1961.7	228.3	93.0
	% var.	-0.96%	-1.98%	-1.58%	29.26%
Heifers	2006	1216.7	1131.6	84.0	1.2
	2007	1216.4	1132.9	81.7	1.8
	% var.	-0.03%	0.12%	-2.75%	47.74%
Calves	2006	917.1	768.5	14.2	134.4
	2007	855.0	721.6	20.6	112.8
	% var.	-6.77%	-6.10%	44.92%	-16.07%
Total	2006	8132.6	7299.4	615.8	217.4
	2007	8178.6	7324.8	636.7	217.1
	% var.	0.57%	0.35%	3.39%	-0.11%

Source: Eurostat

The Member States that showed more marked declines in tonnes for bovines slaughtered in 2007 comparing with 2006 were Bulgaria (-74.0%) and Portugal (-13.4%). On the other hand, the highest positive variation in slaughtered bovine animals was observed in Lithuania (18.3%) and Latvia (10.0%).

Figure 6: Change in weight of slaughtered bovines (2006/2007) by Member State



Source: Eurostat

The average carcass weight has increased continuously since 2002 in the EU.

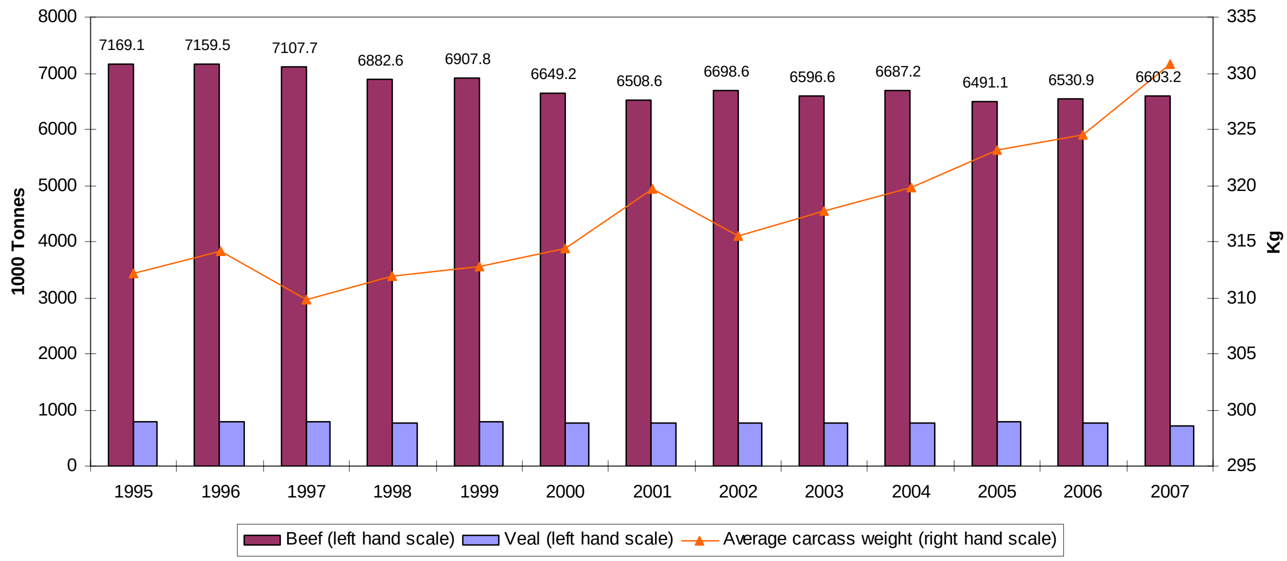
The trend in the average carcass weight in the EU-27 shows a fair increase (+2.2%) in 2007 compared to 2006.

Table 4: Average carcass weight

ACW in Kg		EU-27	EU-15	NMS-10	NMS-2
	2006	336.4	1148.9	281.6	143.7
Bulls	2007	344.4	1215.0	292.0	253.2
	% var.	2.39%	5.75%	3.68%	76.23%
	2006	352.9	105.8	271.2	392.7
Bullocks	2007	361.0	104.9	331.3	172.1
	% var.	2.31%	-0.86%	22.14%	-56.16%
	2006	301.6	316.2	259.3	171.5
Cows	2007	303.3	321.0	258.1	174.1
	% var.	0.56%	1.54%	-0.46%	1.51%
	2006	278.7	283.6	227.2	168.2
Heifers	2007	285.2	290.5	229.7	197.1
	% var.	2.35%	2.42%	1.09%	17.18%
	2006	143.5	144.1	57.0	166.6
Calves	2007	143.3	144.8	62.3	172.4
	% var.	-0.17%	0.51%	9.33%	3.50%
	2006	277.9	286.7	243.6	169.8
Total	2007	284.0	293.6	243.2	175.1
	% var.	2.20%	2.42%	-0.14%	3.16%

Source: Eurostat

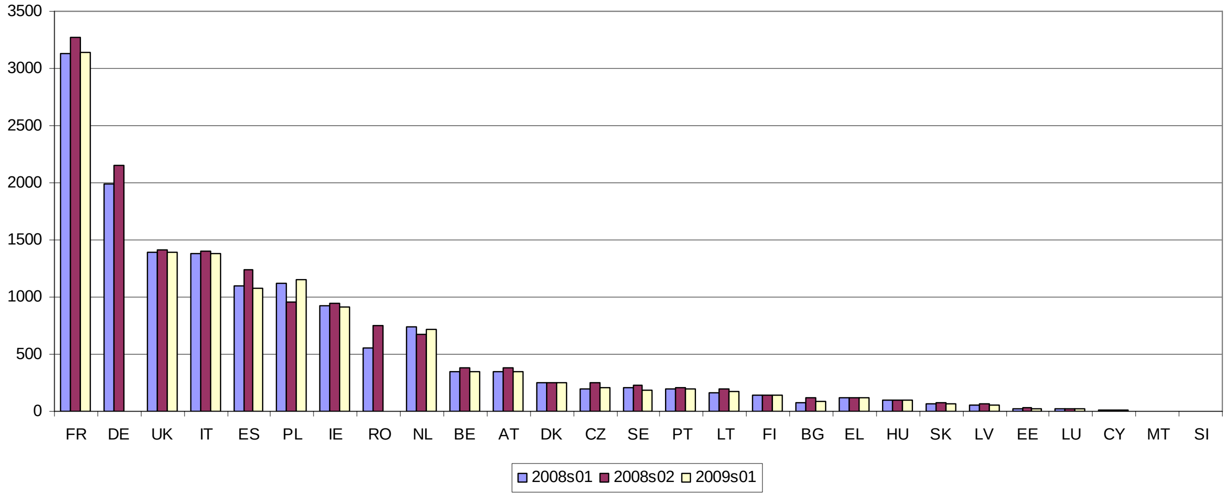
Figure 7: Trend in EU-15 beef and veal production (1995-2007)



Source: Eurostat

Bovine production forecasts are expressed as the gross indigenous production (GIP), which includes all bovine animals slaughtered plus de balances of intra-Community and external trade in live bovine animals. For the main producing Member States, the GIP is expected to increase from the first to the second semester of 2008 and return to a lower level on the first semester of 2009.

Figure 8: Trend in GIP by Member State



Source: Eurostat

Trade

Russia is by far the main export destination (35.2%) for EU beef and live animals followed by Nigeria (6.5%) and Croatia (6.7%). However, exports to Russia decreased around 40% from 2006 to 2007. EU licence applications for exports with refunds have also decreased significantly (-44.5%) in the same period.

Table 5: Main EU exports of beef and live animals

	2004		2005		2006		2007	
Destination	**tonnes**	**%**	**tonnes**	**%**	**tonnes**	**%**	**tonnes**	**%**
Russia	227 842	48.5	138 372	39.3	145 232	50.0	87 083	35.2
Nigeria	6 814	1.5	9 628	2.7	175	0.1	16 174	6.5
Croatia	9 298	2.0	14 405	4.1	9 676	3.3	16 448	6.7

Source: COMEXT

Concerning imports, the main sources of beef and live animals are Brazil (65.5%), Argentina (17.2%) and Uruguay (7.2%). Imports from the main two partner countries increased around 10% in 2007 compared with 2006.

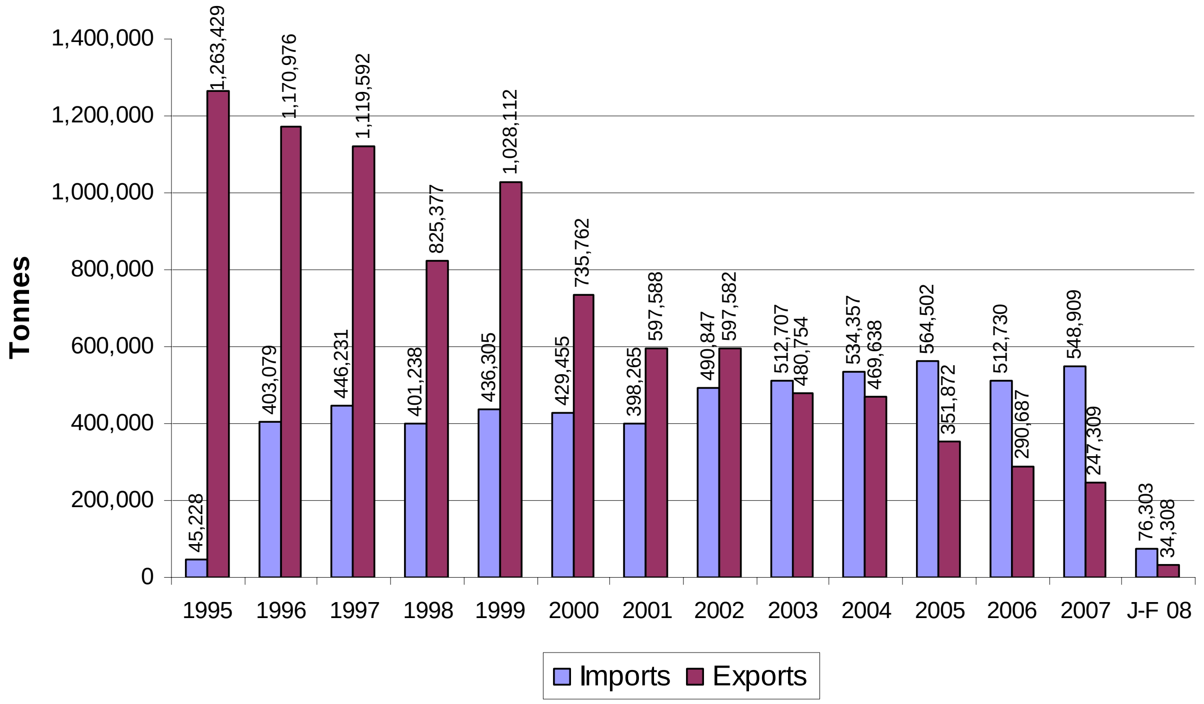
Table 6: Main EU imports of beef and live animals

	2004		2005		2006		2007	
Source	**tonnes**	**%**	**tonnes**	**%**	**tonnes**	**%**	**tonnes**	**%**
Brazil	334 647	62.6	348 680	61.8	331 436	64.6	359 721	65.5
Argentina	111 316	20.8	113 244	20.1	82 852	16.1	94 682	17.2
Uruguay	30 796	5.8	45 821	8.1	45 368	8.8	39 455	7.2

Source: COMEXT

From 2003 onwards EU imports of beef and live animals have exceeded exports. EU imports of fresh/chilled and frozen beef at full duty have increased in 2007 but are likely to decrease in 2008 due to trade restrictions following a foot-and-mouth disease outbreak limiting imports from Brazil.

Figure 9: Trend in EU trade in beef and live animals



Source: Eurostat

Prices

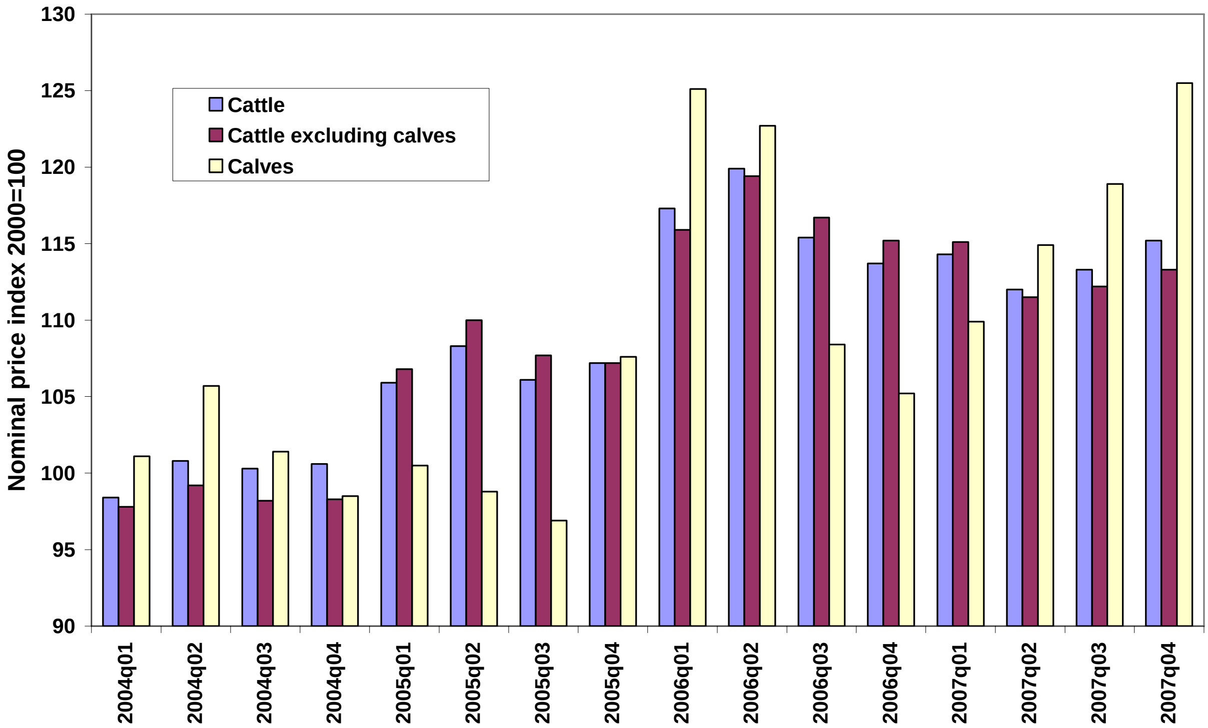
Cattle prices reached a local maximum in the second quarter of 2006. They declined until the second quarter of 2007, after which the upward trend was resumed. The variation was earlier and more marked for calves than for adult cattle. In 2008, beef prices are currently high, in part due to the recent tight cattle supply from Brazil and Argentina.

Table 7: Average carcass prices by animal category

	€/100 kg				% change	
	2004	2005	2006	2007	2007/05	2007/06
Young bulls (A R3)	268.9	291.9	315.8	301.4	3.30%	-4.60%
Steers (C R3)	276.7	284.1	299.5	292.3	2.90%	-2.40%
Cows (D O3)	200.7	228.2	237.8	229.8	0.70%	-3.40%
Heifers (E R3)	278.1	293.6	314.2	314.4	7.10%	0.10%

Source: COMEXT

Figure 10: Cattle price index (2000=100)



Source: Eurostat

METHODOLOGICAL NOTES

Abbreviations:

Belgium	BE	France	FR	Austria	AT
Bulgaria	BG	Italy	IT	Poland	PL
Czech Republic	CZ	Cyprus	CY	Romania	RO
Denmark	DK	Latvia	LV	Portugal	PT
Germany	DE	Lithuania	LT	Slovenia	SI
Estonia	EE	Luxembourg	LU	Slovak Republic	SK
Ireland	IE	Hungary	HU	Finland	FI
Greece	EL	Malta	MT	Sweden	SE
Spain	ES	Netherlands	NL	United Kingdom	UK

EU	European Union
EU-27	European Union (27 Member States, from 2007 onwards)
EU-25	European Union (25 Member States, 2004 - 2006)
EU-15	European Union (15 Member States, 1995 - 2004)
EU-12	European Union (12 Member States, 1986 - 1994)
EU-10	European Union (10 Member States, 1981 - 1985)
EU-9	European Union (9 Member States, 1973 - 1980)
NMS-10	Ten new EU Member States, from 2004: CZ, EE, CY, LV, LT, HU, MT, PL, SI, SK
NMS-2	Two new EU Member States, from 2007: RO, BG
DG AGRI	European Commission, Directorate General for Agriculture and Rural Development
GIP	Gross Indigenous Production

Further information

Data: Eurostat Website: http://ec.europa.eu/eurostat

Select your theme on the left side of the homepage and then 'Data' from the menu.

Data: EUROSTAT Website/Agriculture, forestry and fisheries

Journalists can contact the media support service:

Bech Building Office A4/125 L - 2920 Luxembourg
Tel. (352) 4301 33408 Fax (352) 4301 35349
E-mail: eurostat-mediasupport@ec.europa.eu

European Statistical Data Support:

Eurostat set up with the members of the 'European statistical system' a network of support centres, which will exist in nearly all Member States as well as in some EFTA countries.

Their mission is to provide help and guidance to Internet users of European statistical data.

Contact details for this support network can be found on our Internet site: http://ec.europa.eu/eurostat/

A list of worldwide sales outlets is available at the:

Office for Official Publications of the European Communities.

2, rue Mercier
L - 2985 Luxembourg

URL: http://publications.europa.eu
E-mail: info@publications.europa.eu

Manuscript completed on: 22.05.2008
Data extracted on: 21.04.2008
ISSN 1977-0316
Catalogue number: KS-SF-08-049-EN-N