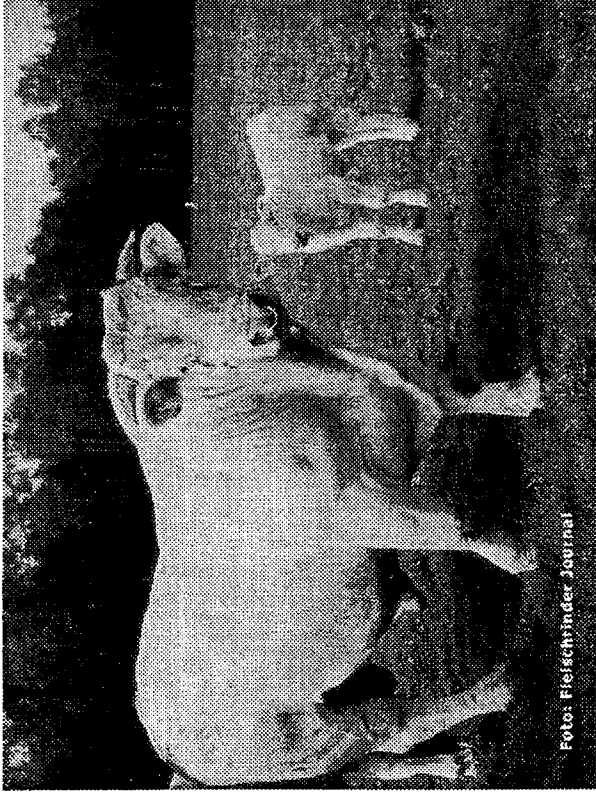


IMS



Beef Committee Meeting

Jean-Luc Mériaux

Winnipeg, 14 June 2004

IMS



Beef Committee Meeting

Jean-Luc Mériaux
Winnipeg, 14 June 2004

EU15 Beef Production

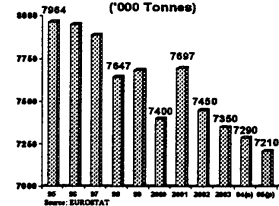
EU15 Net Beef Production
1995-2005
('000 Tonnes)

In 2004:
Production slightly
lower (-0.8%)

France ↓

Germany, Italy and
Spain ↑

In 2005: ?



Winnipeg, 2004

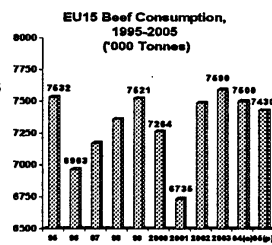
EU15 Beef Consumption

In 2003:

- ✓ good recovery
- ✓ Highest level since 1995

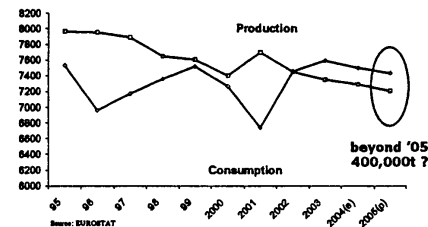
In 2004, a fall is expected:

- ✓ Weakness of the economy
- ✓ Decrease of production
- ✓ Increase in prices



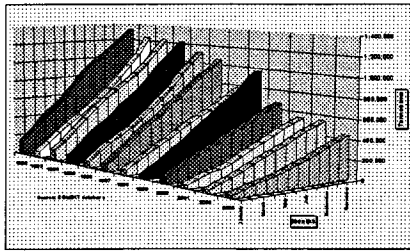
Winnipeg, 2004

Growing Deficit in EU15 Beef Production



Winnipeg, 2004

Result is falling EU15 Exports ... (1)



Winnipeg, 2004

Result is falling EU15 Exports ... (2)

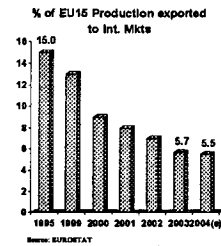
In 2003: fall by 20 %

In 2004: fall by 4 %

Livestock steady

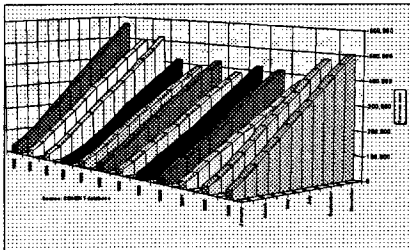
Beef exports affected by:

- ✓ South American competition
- ✓ Lower EU availability
- ✓ Stronger Euro



Winnipeg, 2004

... and rising EU15 Imports (1)



Winnipeg, 2004

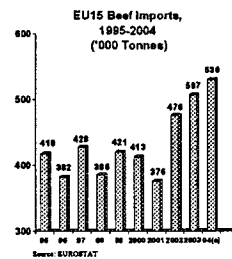
... and rising EU15 Imports (2)

Up 20% since 1999 to 507,000 t in 2003:

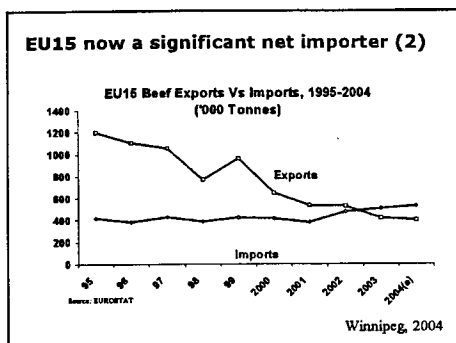
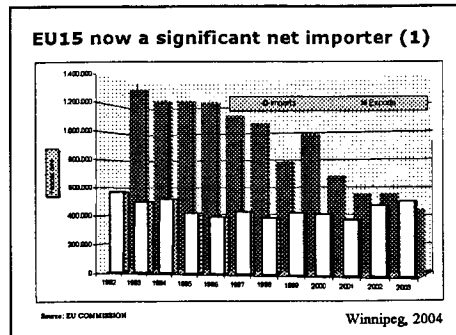
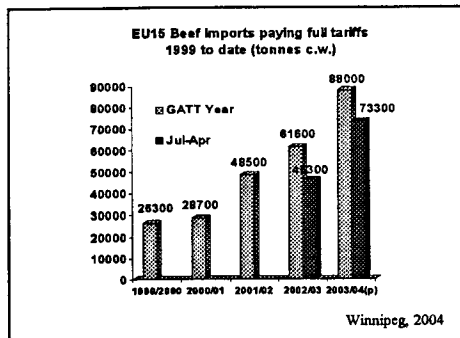
livestock up 16% beef up 5,5%

And up 4,5% in 2003/2004

Strong rise in volumes paying full duties



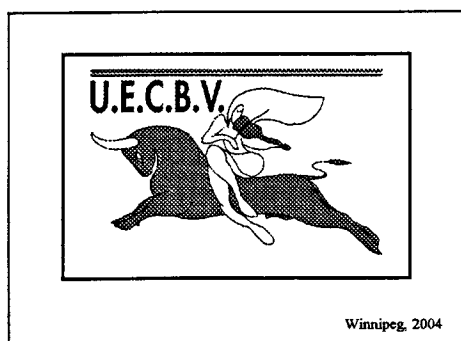
Winnipeg, 2004



Perspectives & Challenges

- ❖ EU ENLARGEMENT: 1st OF MAY 2004
- ❖ IMPLEMENTATION OF THE CAP REFORM, FROM 2005 ONWARDS
- ❖ CHANGE IN THE OVER THIRTY MONTHS SCHEME IN THE UK (2005?)
- ❖ NEGOTIATIONS ON THE MERCOSUR AGREEMENT (2006?)
- ❖ NEGOTIATIONS ON THE DOHA TRADE ROUND (?)

Winnipeg, 2004



Winnipeg, 2004