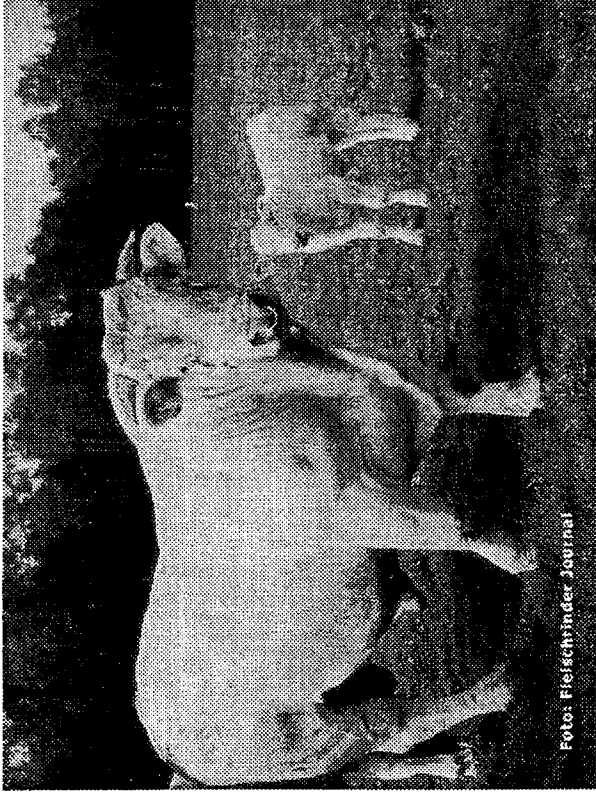


# IMS



## Beef Committee Meeting

Jean-Luc Mériaux

Winnipeg, 14 June 2004

IMS



## Beef Committee Meeting

Jean-Luc Mériaux  
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### EU15 Beef Production

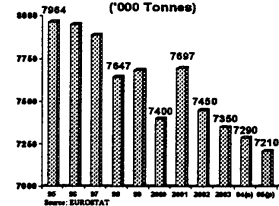
EU15 Net Beef Production  
1995-2005  
('000 Tonnes)

In 2004:  
Production slightly  
lower (-0.8%)

France ↓

Germany, Italy and  
Spain ↑

In 2005: ?



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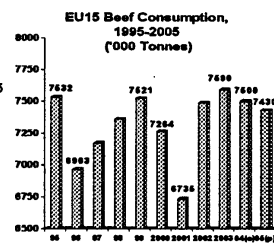
### EU15 Beef Consumption

In 2003:

- ✓ good recovery
- ✓ Highest level since 1995

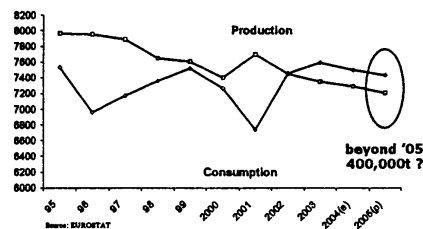
In 2004, a fall is expected:

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



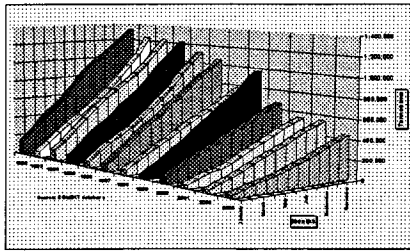
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### Growing Deficit in EU15 Beef Production



Winnipeg, 2004

### Result is falling EU15 Exports ... (1)



Winnipeg, 2004

### Result is falling EU15 Exports ... (2)

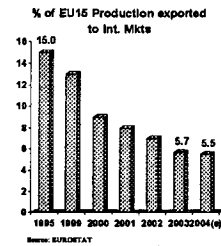
In 2003: fall by 20 %

In 2004: fall by 4 %

Livestock steady

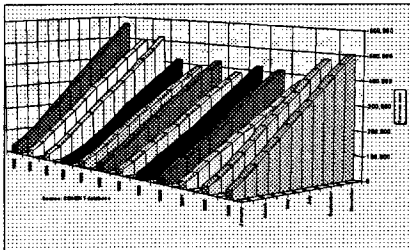
Beef exports affected by:

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



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### ... and rising EU15 Imports (1)



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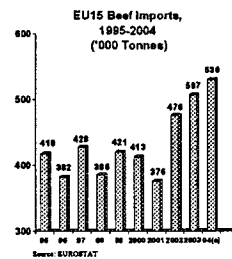
### ... and rising EU15 Imports (2)

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

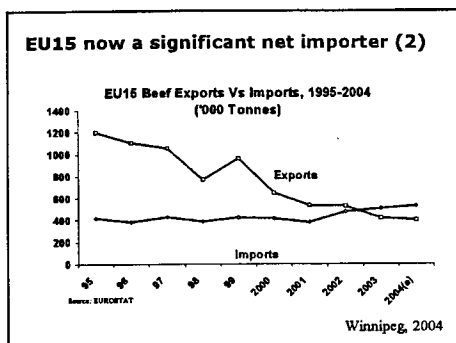
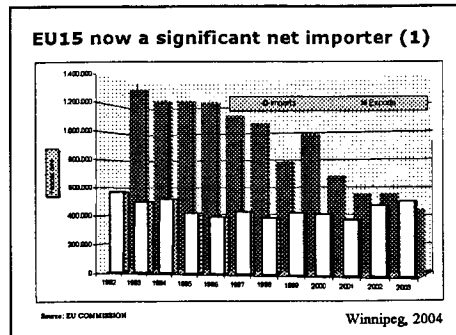
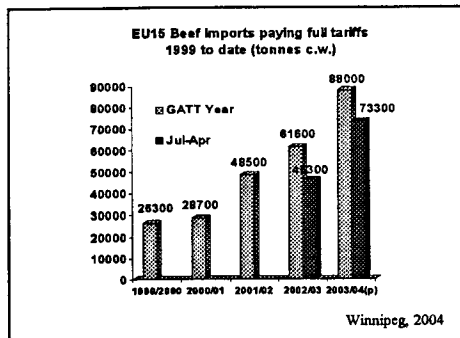
livestock up 16% beef up 5,5%

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

