

3rd Cattle Network – EAAP Workshop

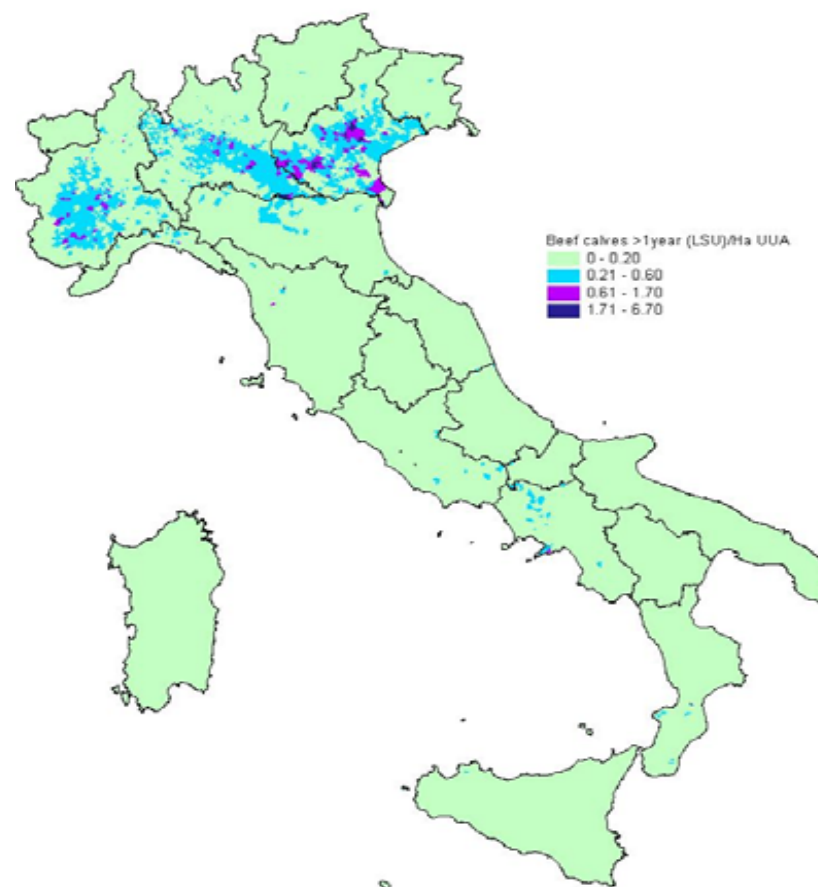
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**Implementation of the CAP reform on beef fattening systems:
Italian and Spanish cases**

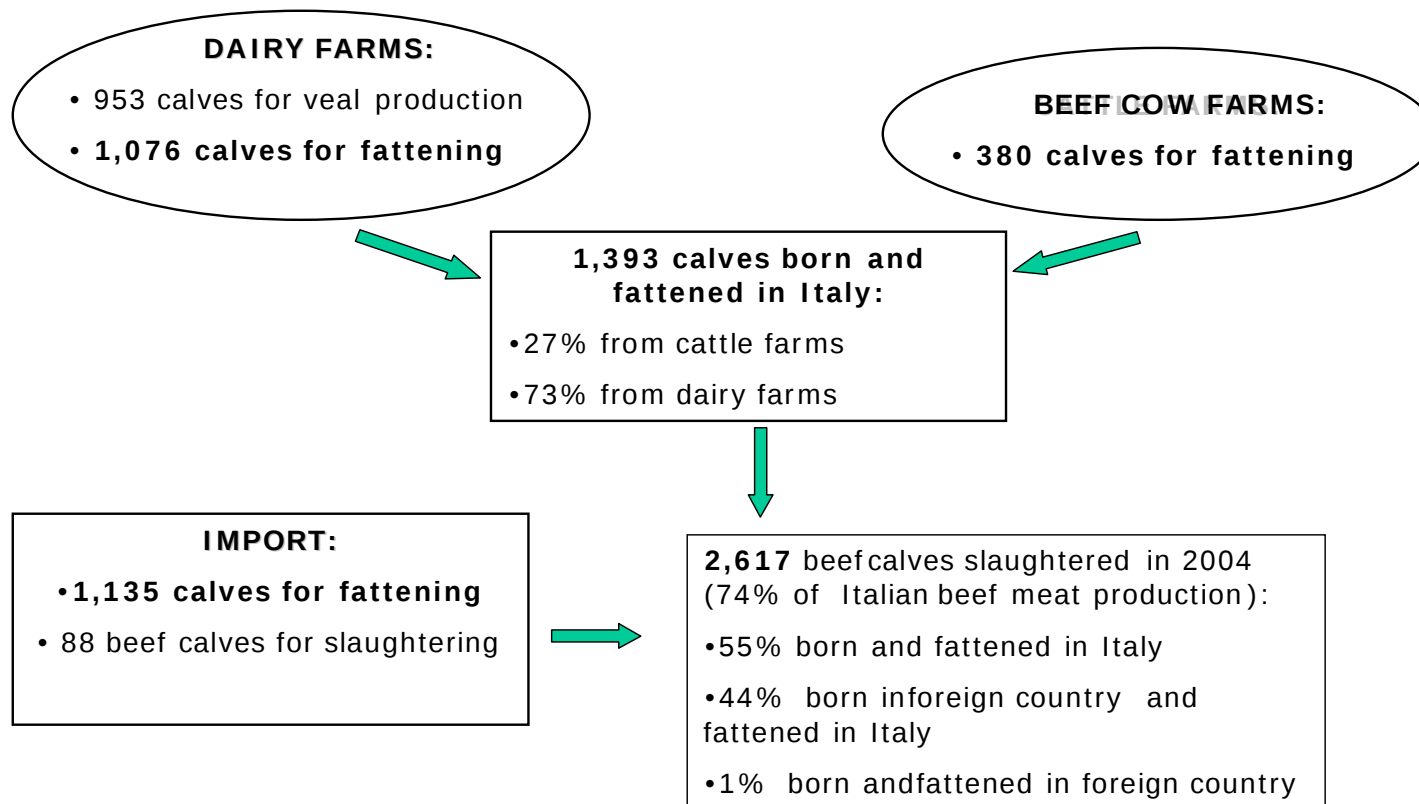
Kees de Roest, CRPA Reggio Emilia, Italy

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Beef cattle flows in Italy - 2004



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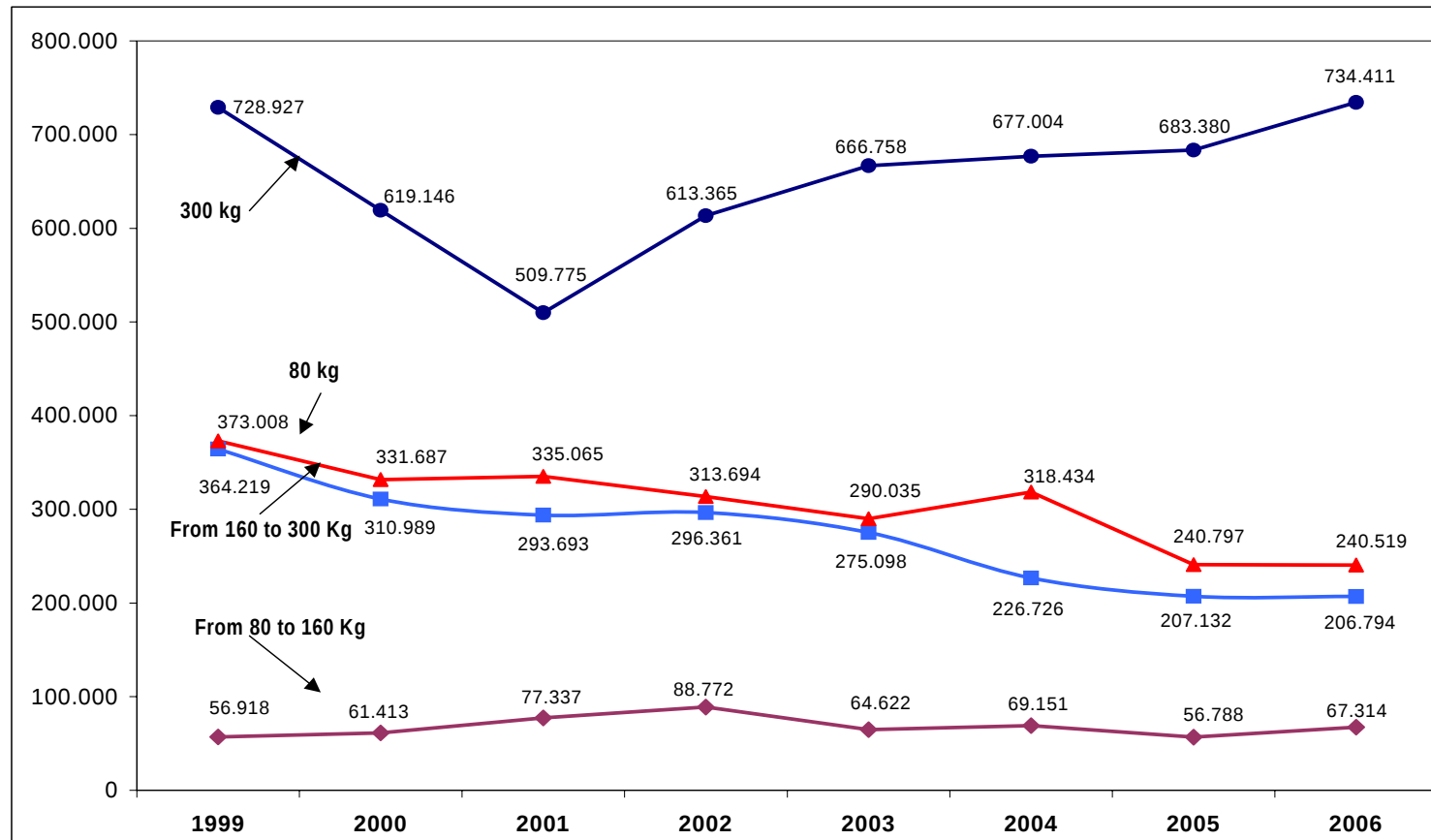
**Beef and veal production in Italy 2003- 2006
(in 1 000 heads)**

	2003	2004	2005	2006	2007	07/06
Veal calves	1.031	984	988	966	891	-7,8
Beefs bulls	1.963	2.037	1.949	1.958	1.933	-1,3
Beef heifers	598	580	565	593	609	2,7
Cull cows	618	596	575	528	518	-1,9
Total	4.210	4.197	4.077	4.045	3.950	-2,3

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Imports of live bovine animals 1999 - 2006



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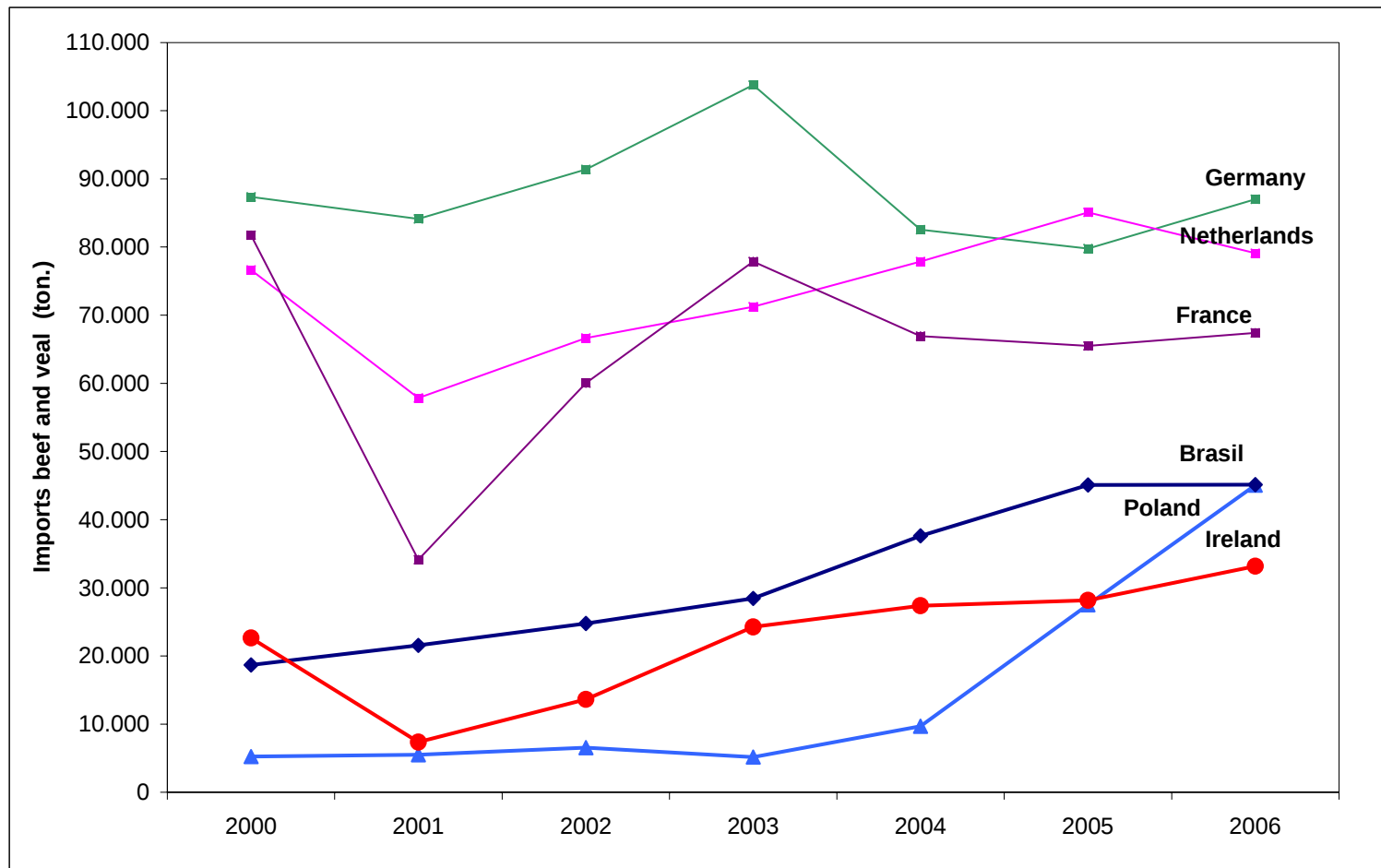
Imports of beef and veal 2000 - 2006

Categoria	2000	2001	2002	2003	2004	2005	2006	06/05
Carcasses	111.712	86.655	96.925	102.777	94.846	121.811	128.604	5,6
Hind quarters	107.324	82.364	103.013	107.838	107.271	114.212	117.235	2,6
Other beef cuts	118.337	75.739	105.356	119.049	132.199	145.903	159.881	9,6
Frozen beef	53.052	31.583	44.436	86.101	57.228	48.912	47.261	-3,4
Totale	390.425	276.344	349.730	415.765	391.543	430.838	452.981	5,1

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Imports of beef and veal 2000 - 2006



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Technical data beef fattening systems

	Veneto	Piedmont	Tuscany
Breed	Charolais Cross breeds	Blonde Acquittaine	Chianina
Calf fattening places(n.)	1.320	380	28
Hectares of forage crops (Ha)	108	65	13
Cattle density per ha (LSUHa forage crops)	7,0	4,5	1,2
Net production (t)	570,5	162,4	8,7

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Technical data beef fattening systems

Veneto		Piedmont		Tuscany	
Roughage	Kg/head/ day	Roughage	Kg/head/ day	Roughage	Kg/head/ Day
Maize silage	6,9	Maize silage	2,2		
Maize mixture	1,1	Maize mixture	1,4		
Beet pulp silage	1,9	Beet pulp silage	0,1		
Straw	0,9	Straw	0,9		
		Hay	1,1	Hay	5,6
<i>Total roughage</i>	<i>10,7</i>	<i>Total roughage</i>	<i>5,6</i>	<i>Total roughage</i>	<i>5,6</i>

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Technical data beef fattening systems

Veneto		Piedmont		Tuscany	
Concentrates	Kg/head/ Day	Concentrates	Kg/head/ day	Concentrates	Kg/head/ day
Maize flour	2,5	Maize flour	1,3	Maize flour	2,9
				Barley flour	1,6
Coarse grains	0,4	Coarse grains	0,2	Coarse grains	0,2
Soybean meal	0,7	Soybean meal	0,4	Soybean meal	0,6
Protein integration	0,4	Protein integration	0,4	Protein integration	0,1
Compound feed	0,7	Compound feed	3,3	Compound feed	2,1
Dried beet pulp	0,8	Dried beet pulp	0,2		
Total concentrates	5,4	Total concentrates	5,7	Total concentrates	7,5

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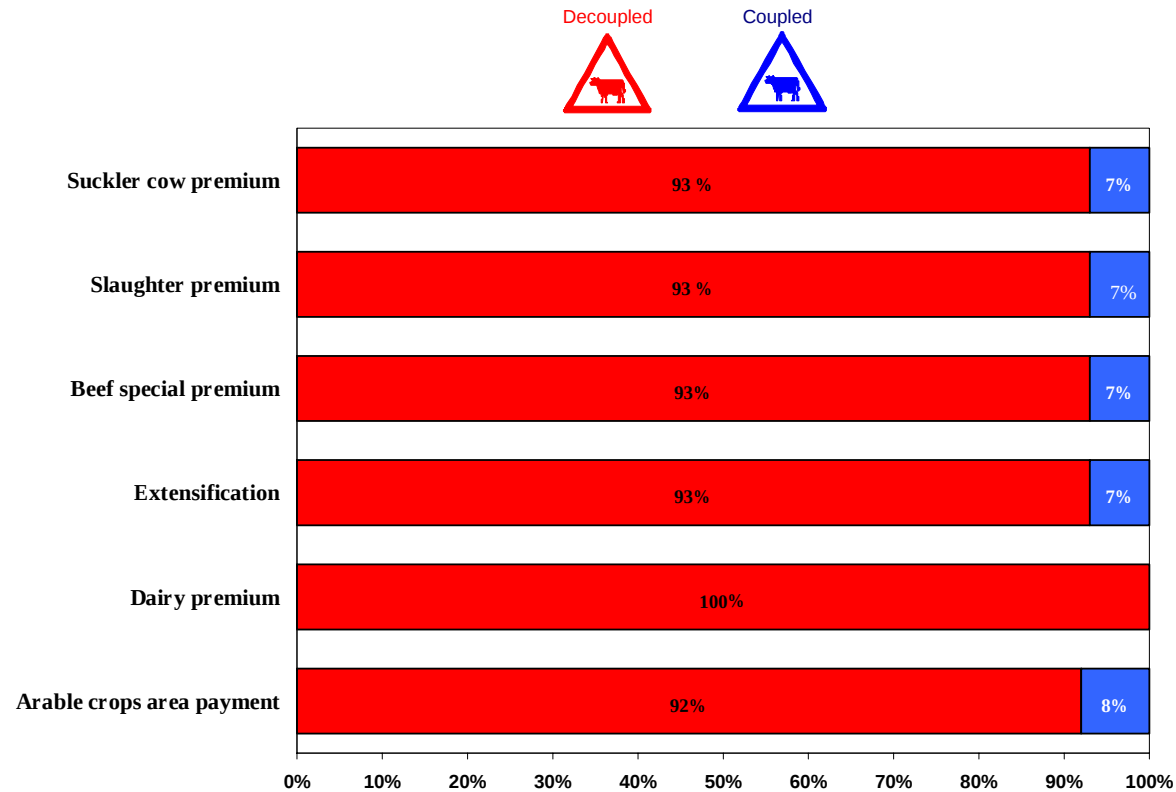
Technical data beef fattening systems

	Veneto	Piedmont	Tuscany
Calves purchased (n.)	2.145	551	21
Average purchase weight	368	237	257
Fattened bulls sold (n.)	1.988	520	18
Average weight at sale (kg)	641	597	722
Daily growth (kg / day)	1,30	1,39	1,25
Fattening cycle (days)	210	260	372
Mortality rate (%)	1,2	1,7	0,0
Labour productivity (kg / h)	51	35	8,3
Net production (t)	531	162	8.7

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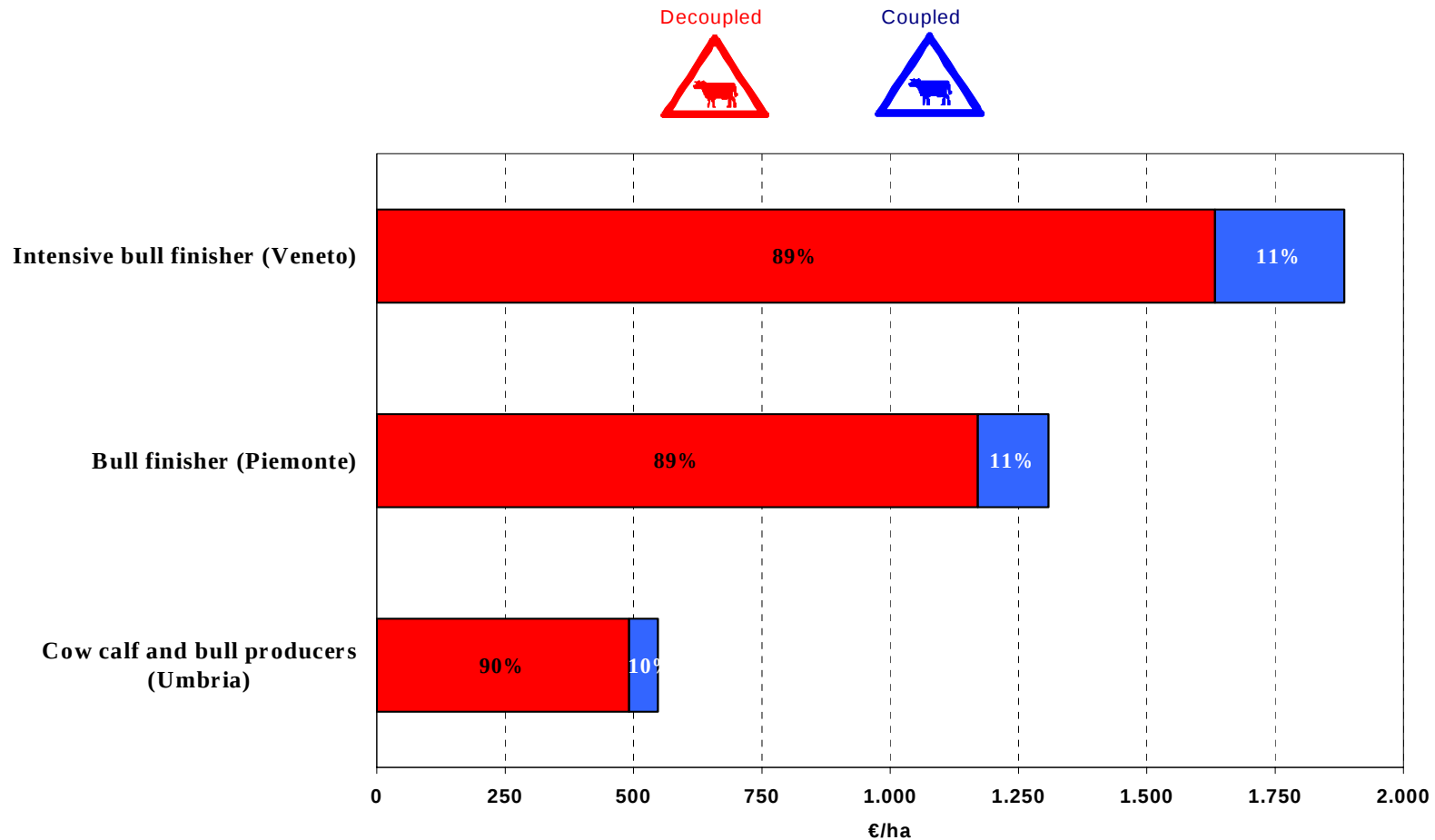
Implementation of CAP reform in Italy



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Implementation of CAP reform in Italy



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Technical data of beef fattening in Veneto

	2002	2003	2004	2005	2006
Net production (t)	565	514	552	531	538
Animals sold (n.)	2.274	1.963	2.301	1.988	1.960
Purchased weaners (n.)	2.279	2.054	2.169	2.145	1.993
Liveweight at sale (kg)	614	633	631	641	640
Weight of weaner (kg)	342	351	360	368	370
Purchase price weaner (€/kg)	2,38	2,63	2,43	2,62	2,80
Sales price finished bulls (€/kg)	2,07	2,12	2,03	2,14	2,30
Fattening period (days)	222	234	223	210	208
Daily growth rate (kg)	1,23	1,20	1,22	1,30	1,30
Labour productivity (kg/h)	52	55	52	51	54

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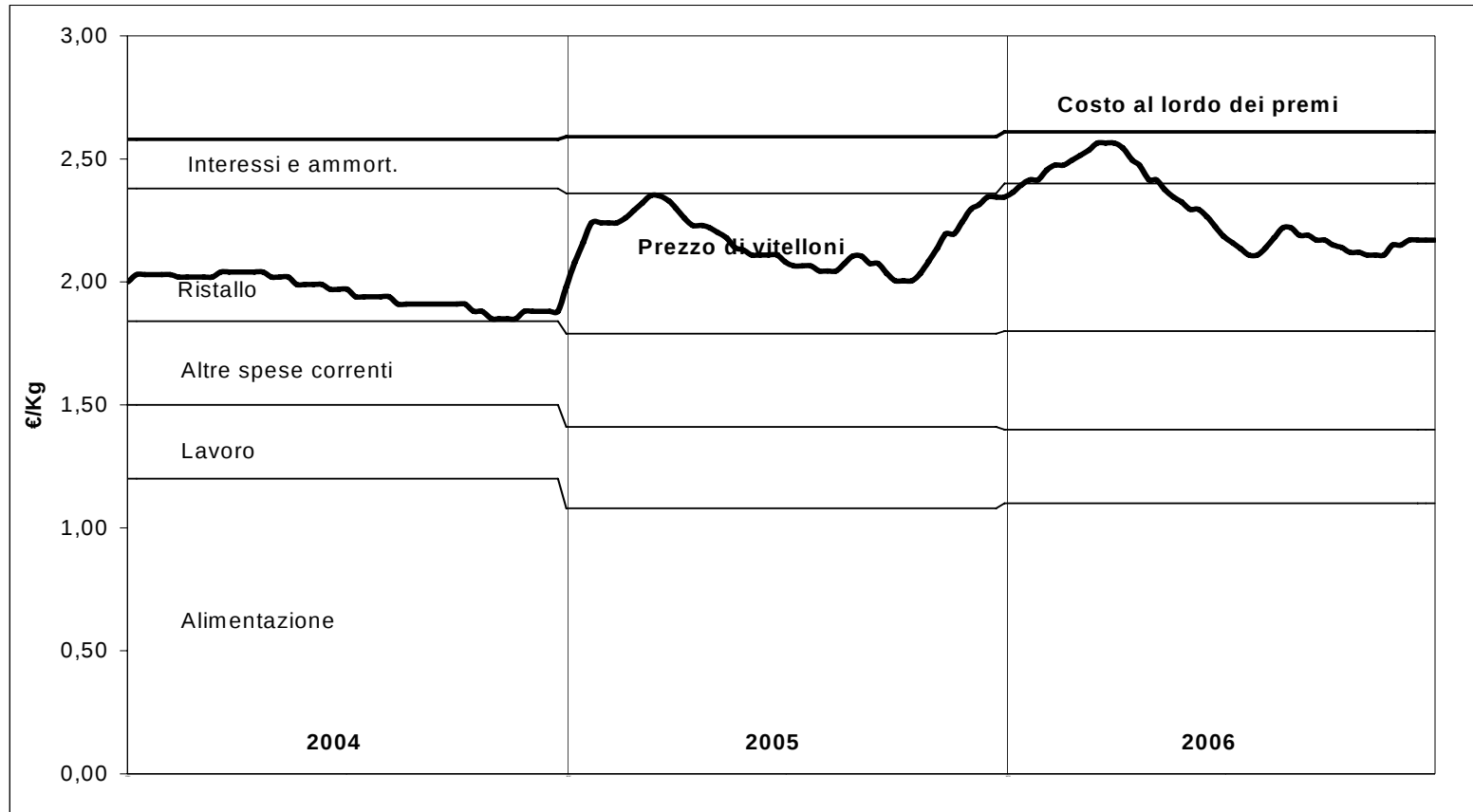
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Production costs per kg of meat (liveweight)

Cost items	2004		2005		2006	
	€/kg	%	€/kg	%	€/kg	%
Feed costs	1,20	46,9	1,08	41,7	1,10	42,1
Labour	0,30	11,7	0,33	12,7	0,30	11,5
Other var.costs	0,34	13,3	0,38	14,7	0,40	15,3
Depreciation	0,11	4,3	0,13	5	0,12	4,6
Interests	0,09	3,5	0,10	3,9	0,09	3,4
Total breeding costs	2,04	79,7	2,02	78	2,01	77
Cost of weaner	0,54	21,1	0,57	22	0,60	23
Total production costs	2,58	100	2,59	100	2,61	100
CAP premia	0,65	25,4	0,67	25,9	0,63	24,1
Net cost of production	1,93	75,4	1,92	74,1	1,98	75,9

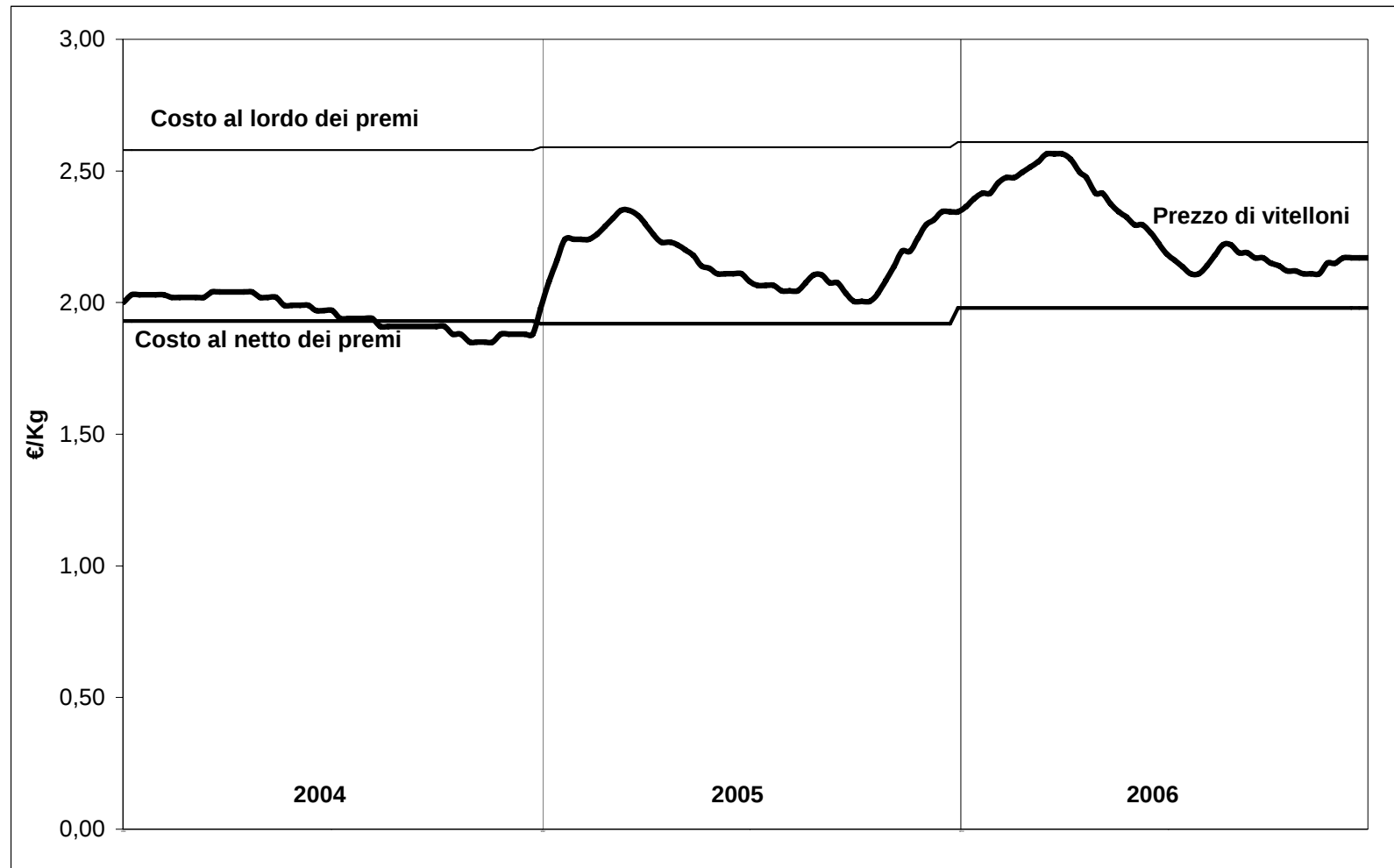
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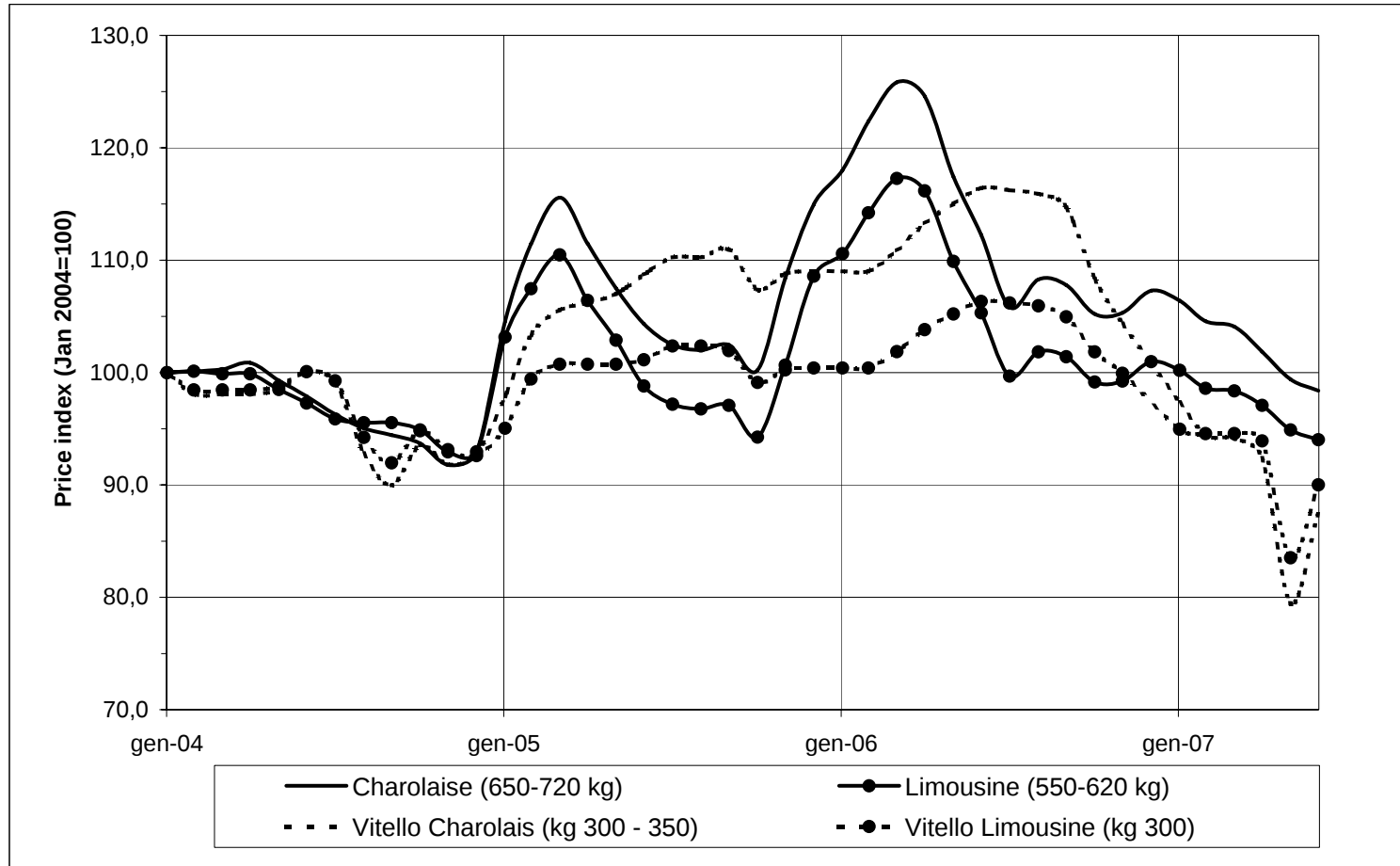
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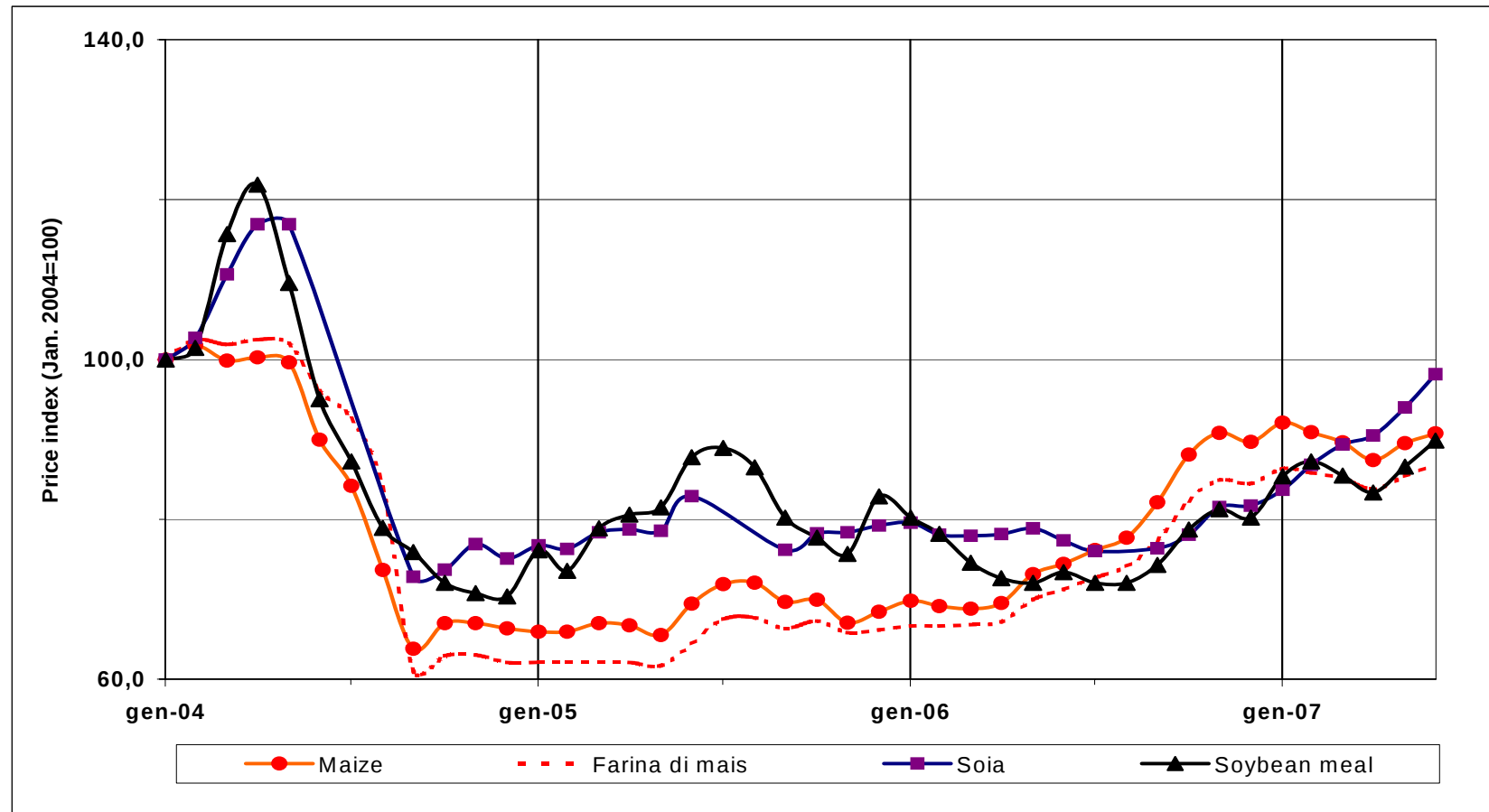
Prices of finished bulls and weaners



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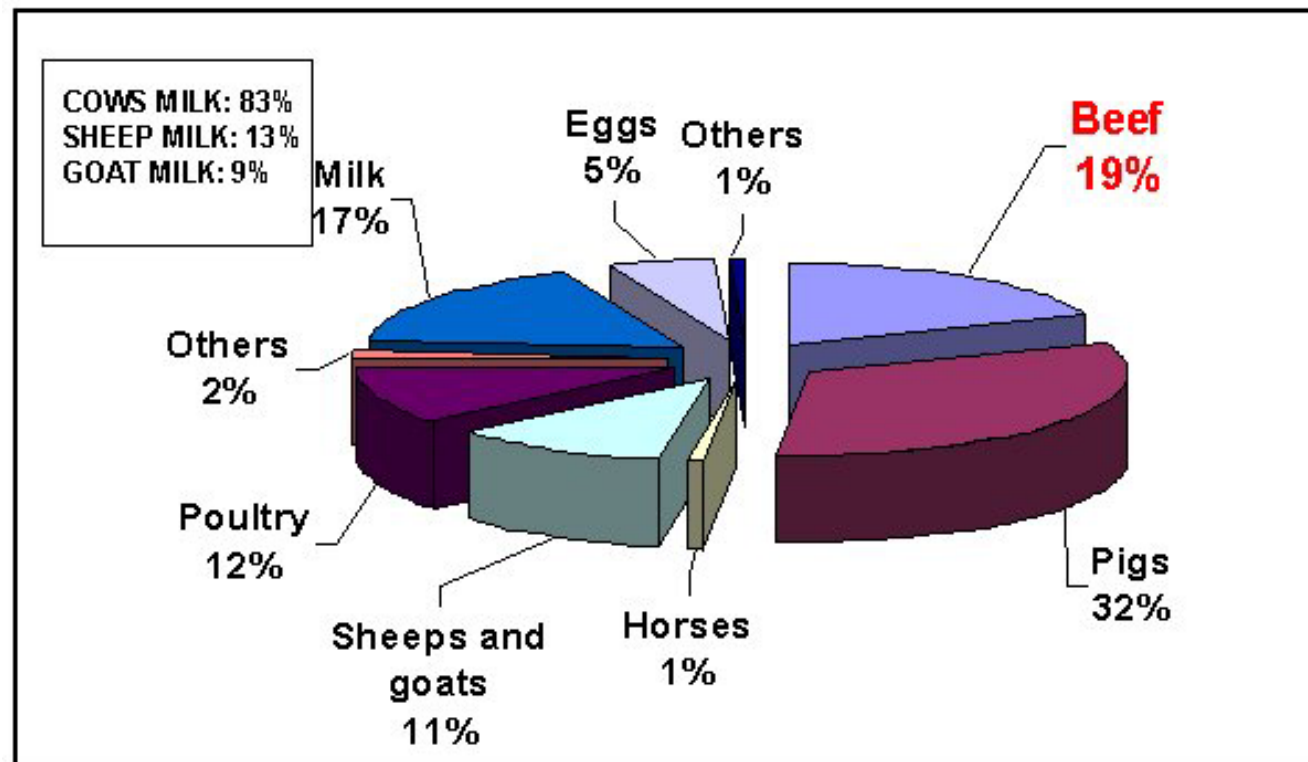
Feed prices 2004 - 2007



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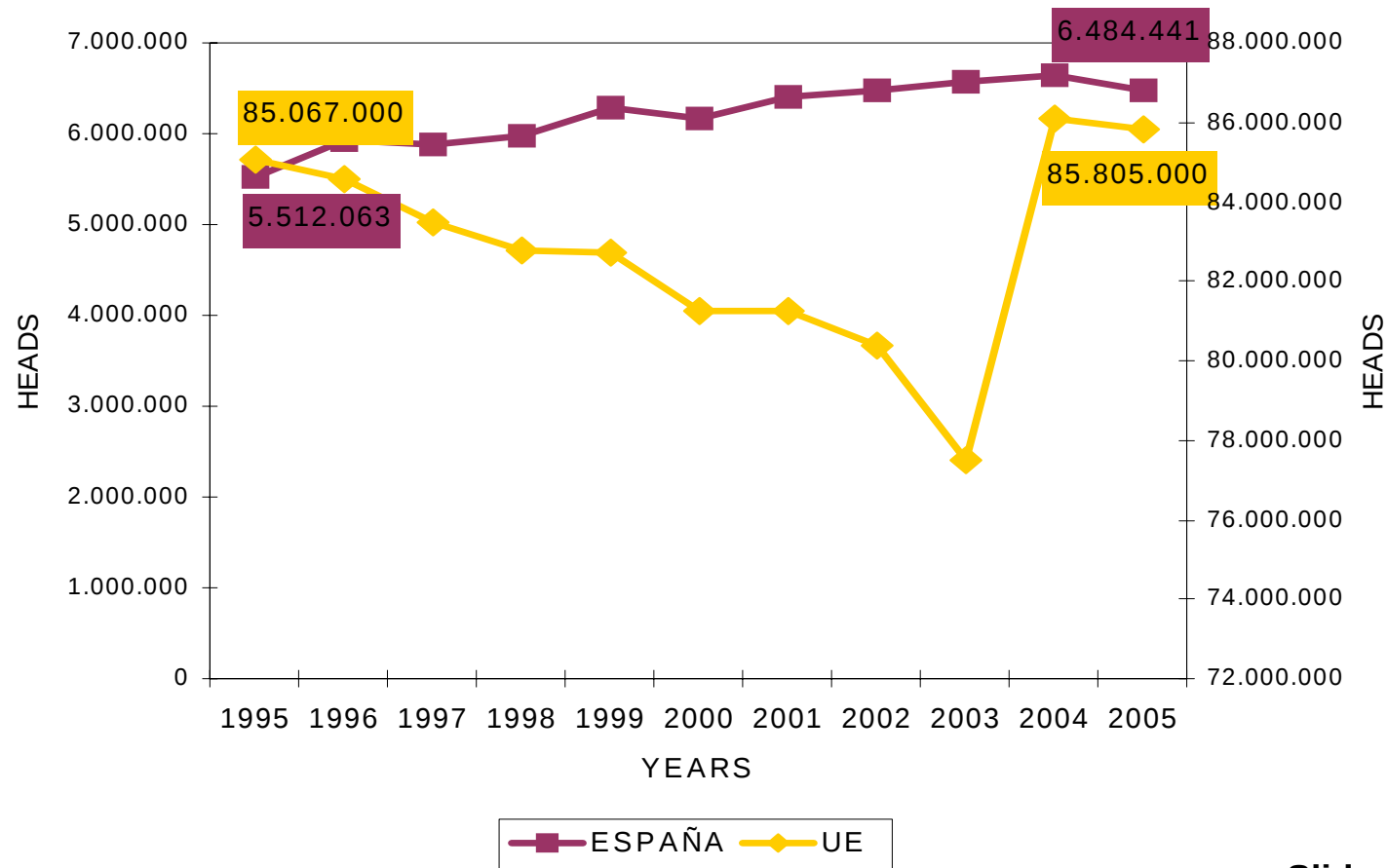
Distribution of Spanish Livestock Production in 2006



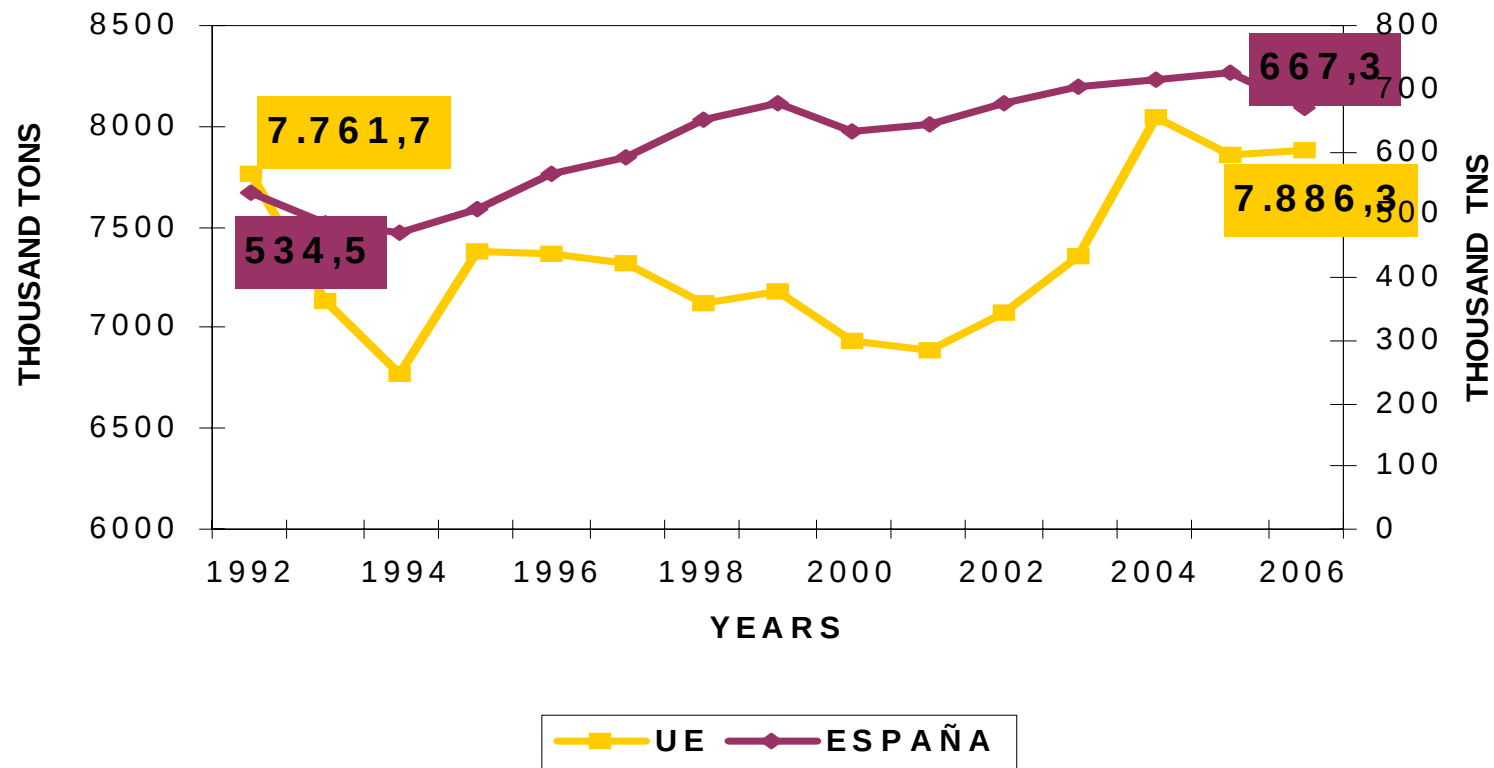
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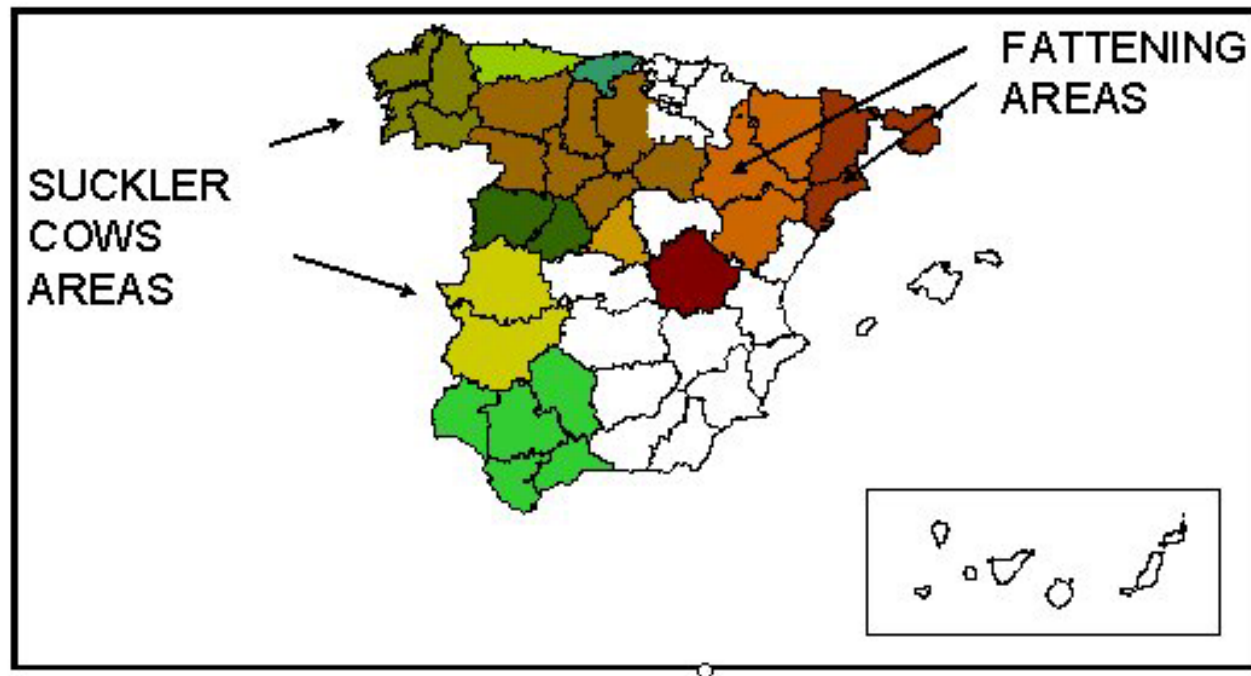
Evolution of Spanish / UE cattle census in the last decade



Beef Slaughtering evolution Spain / UE in the last year



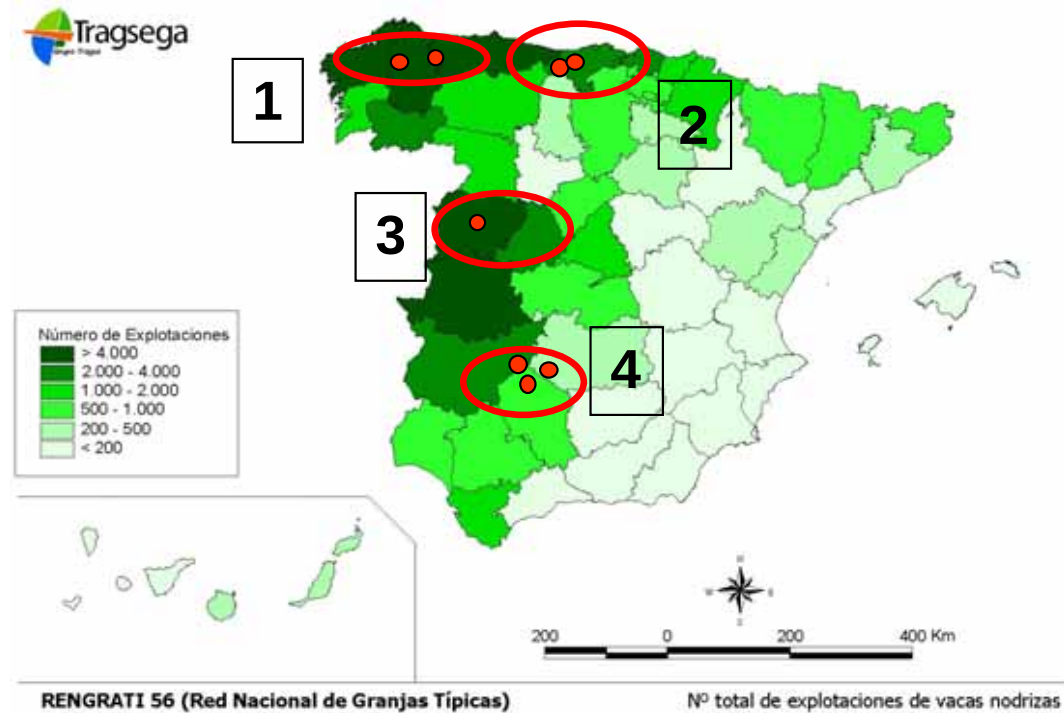
Geographical distribution of Spanish beef sector



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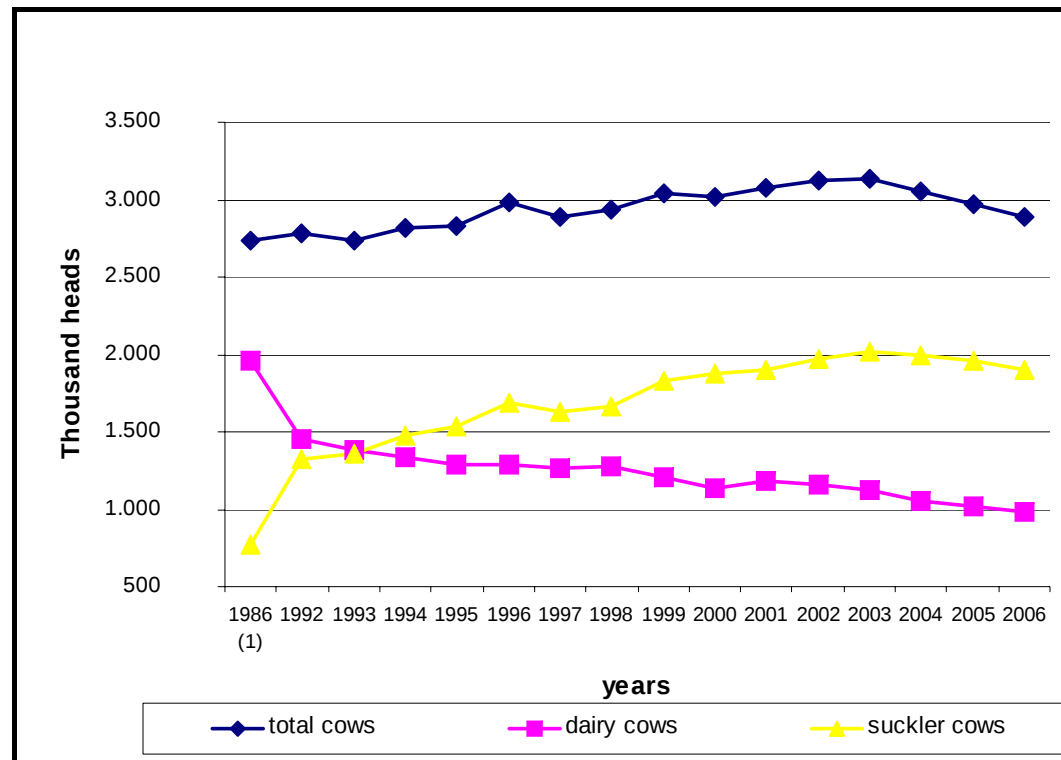
Geographical distribution of cow calf farms
Belonging to the National Network of Typical Farms (



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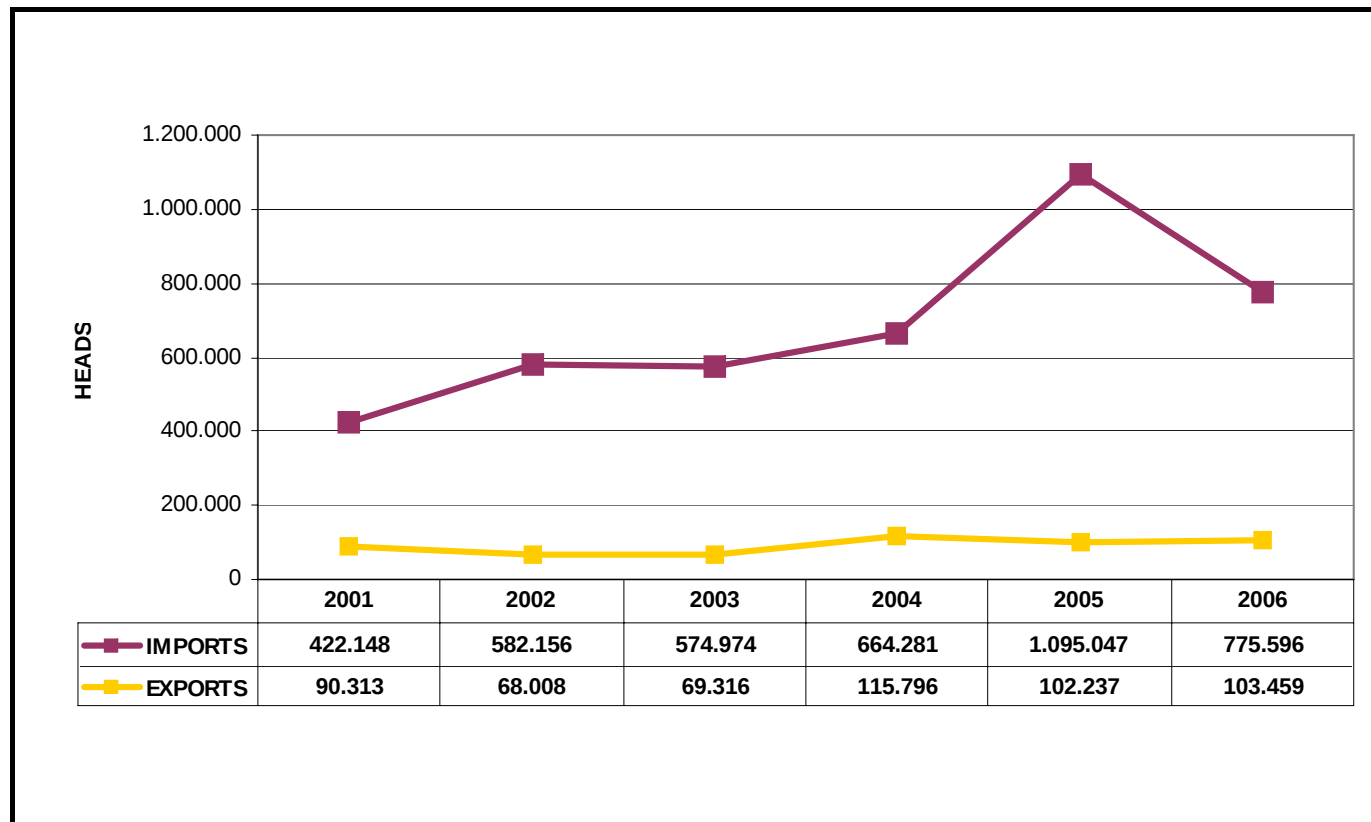
Evolution of Spanish cow census suckler and dairy cows



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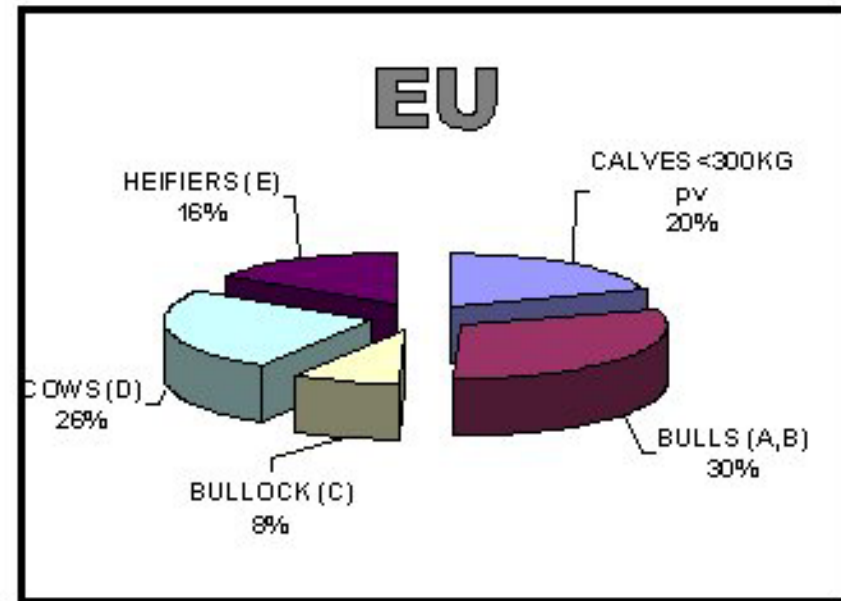
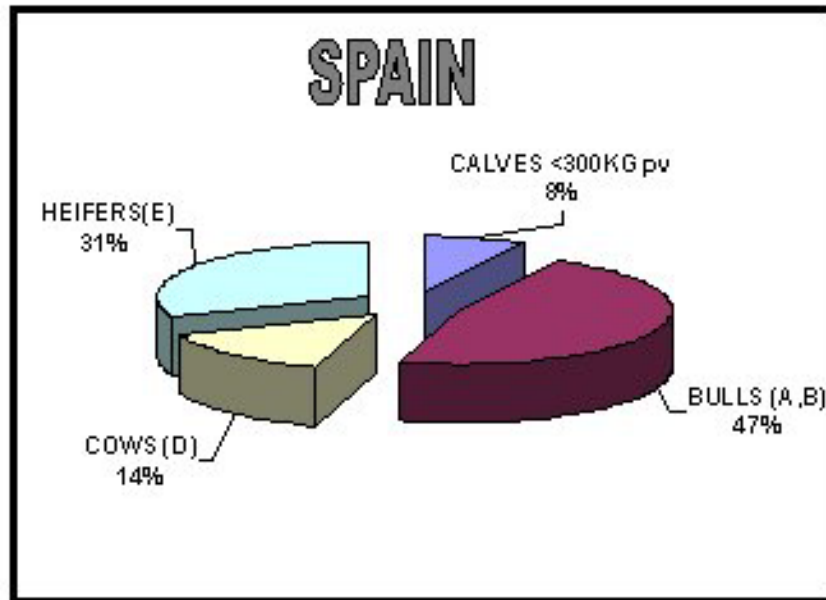
Evolution of imports and exports of cattle in Spain in recent years



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Slaughtering distribution by ages SPAIN / UE 2006



CAP Implementation in Spain

Implementation in 2006

- 100% coupling of slaughter premiums calves
- 100% coupling of suckler cow premium
- 40% coupling of slaughter premium of adult cattle
- special premium for male calves, extensification premium and additional payments are decoupled and flow into Single Farm Payment

Implementation of article 69

7% retention of payments for beef sector (54 € mln)

1) 47 mln € for suckler cow farms raising less than 1.5 LU per hectare

For the first 40 heads: 32,62 per cow

From 41-70 heads : 21,85 per cow

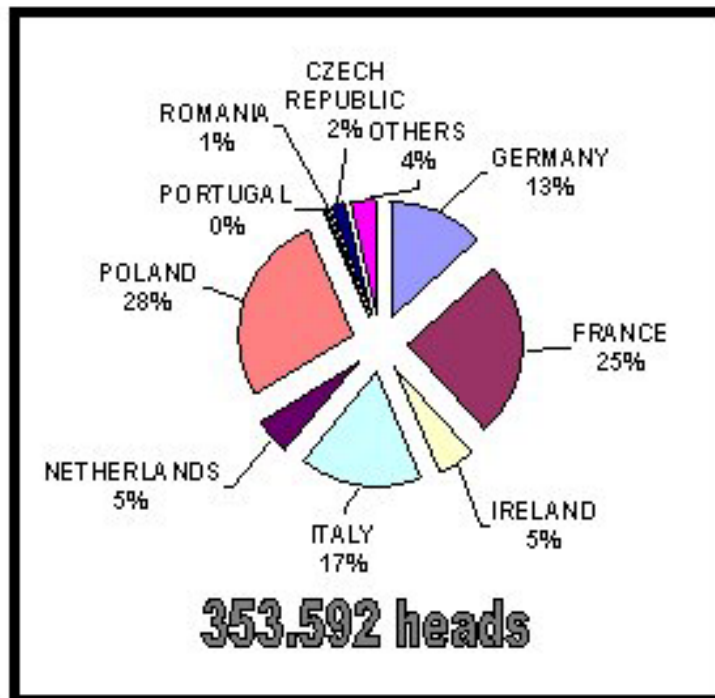
From 71 to 100 heads:10,76 per cow

2) 7 mln € for marketing of quality beef (PDO, organic and voluntary labelling) (in 2006 14.73 € per head for 19% of Spanish beef production)

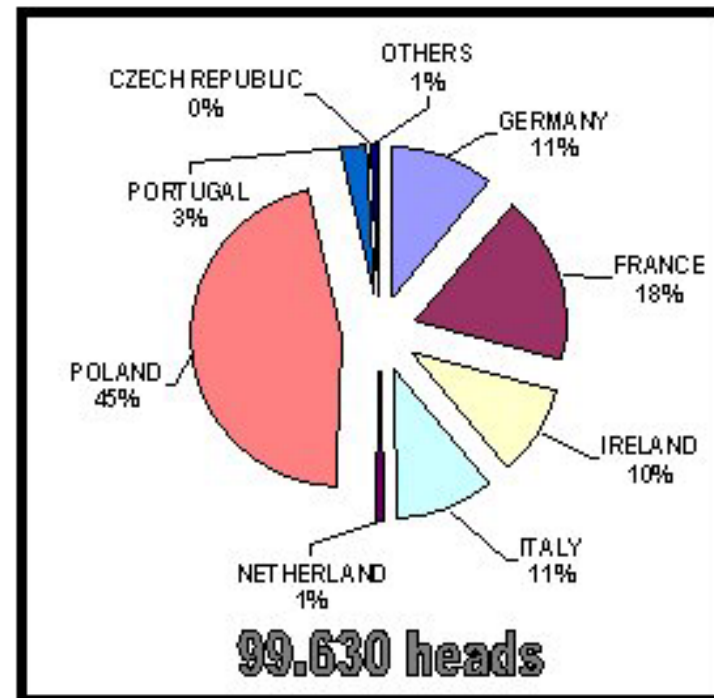
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LIVE ANIMAL IMPORTS <80KG



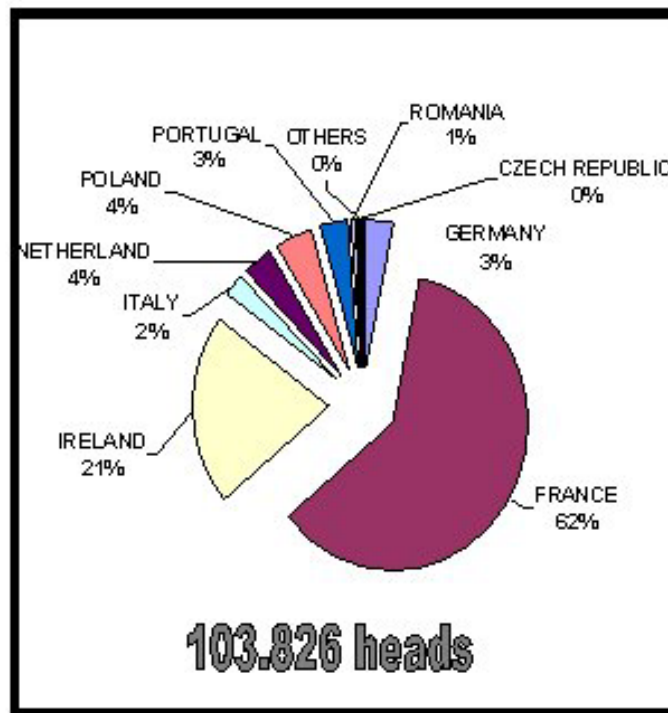
LIVE ANIMAL IMPORTS 80-160KG



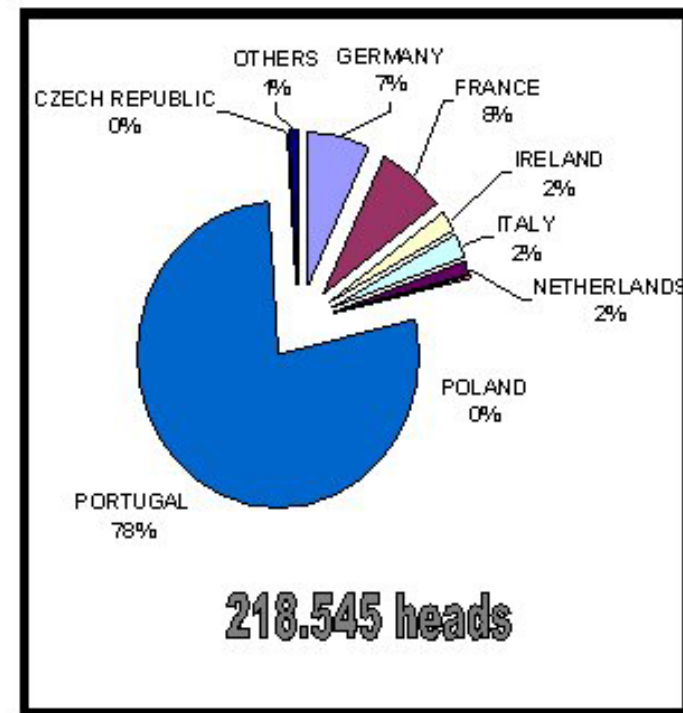
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LIVE ANIMAL IMPORTS 160-300KG



LIVE ANIMAL IMPORTS >300KG



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Evolution of prices for concentrates, weaners beef bulls since January 2006 in Spain

