

**Adaptation and conformation of EU beef systems  
to CAP regulations  
Synthesis of the Beef Task Force collaboration**

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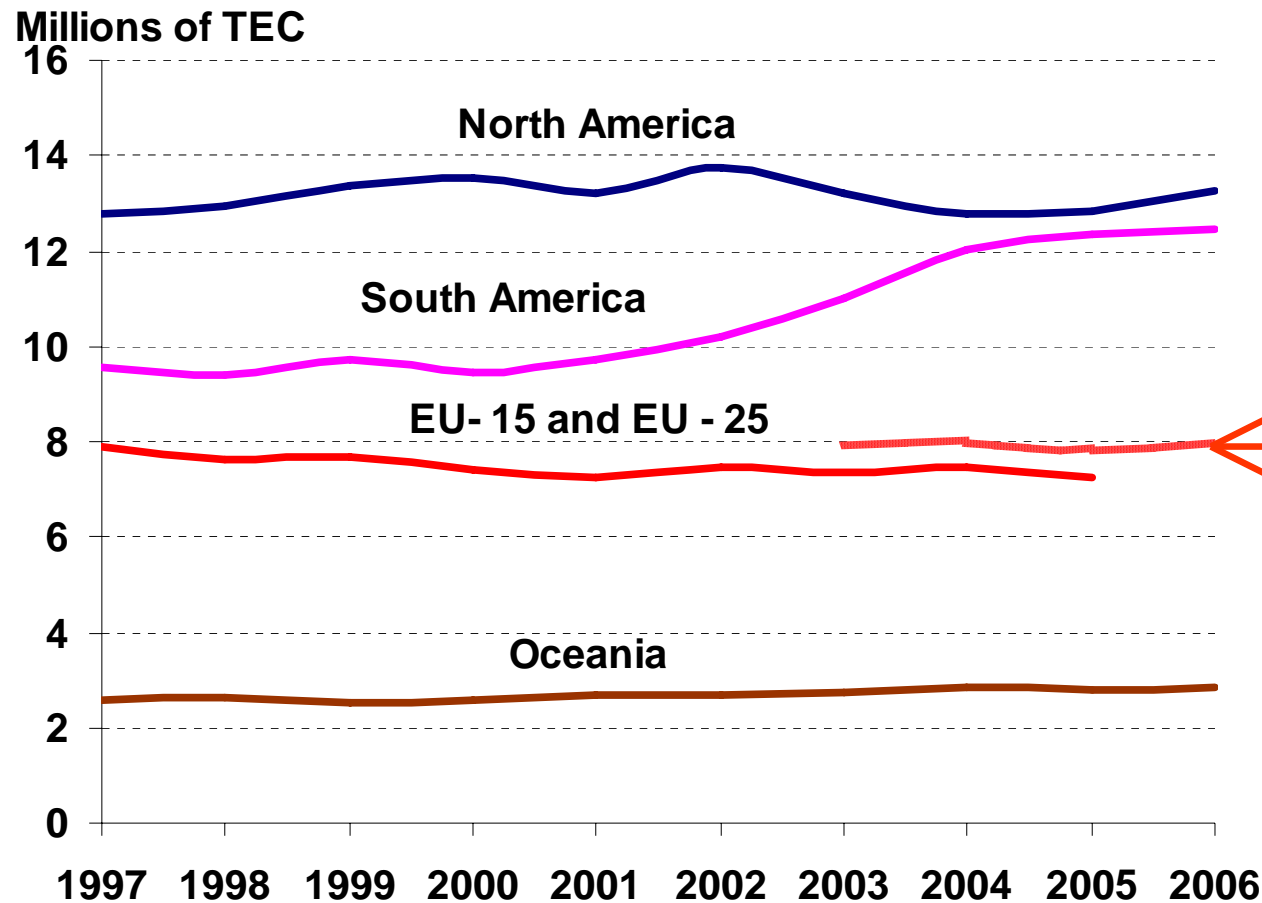
For the EAAP Beef Task Force

***The EAAP Beef Task Force was created with the aim of developing tools and methods for policy impact analysis and for monitoring and analysis of farm strategies.***

***The BTF has agreed on the methods of defining standard procedures for monitoring and analyzing economic efficiency of beef farm operations.***

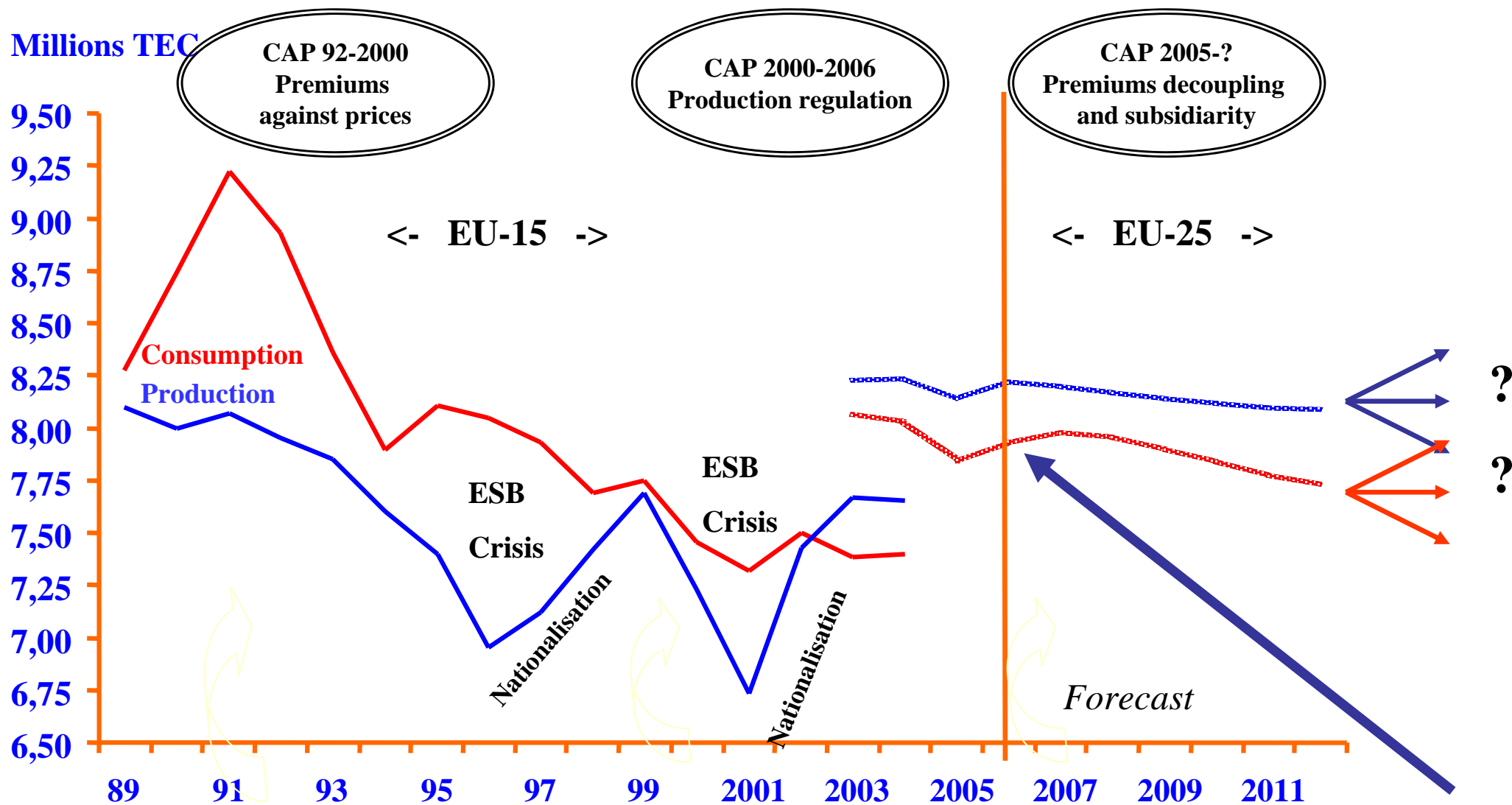
***The BTF worked on the analysis of the evolution of the European beef production and beef farming systems through the last CAP reform.***

## *Changes in the world beef production during the last 10 years*



*A challenge for the future*

?



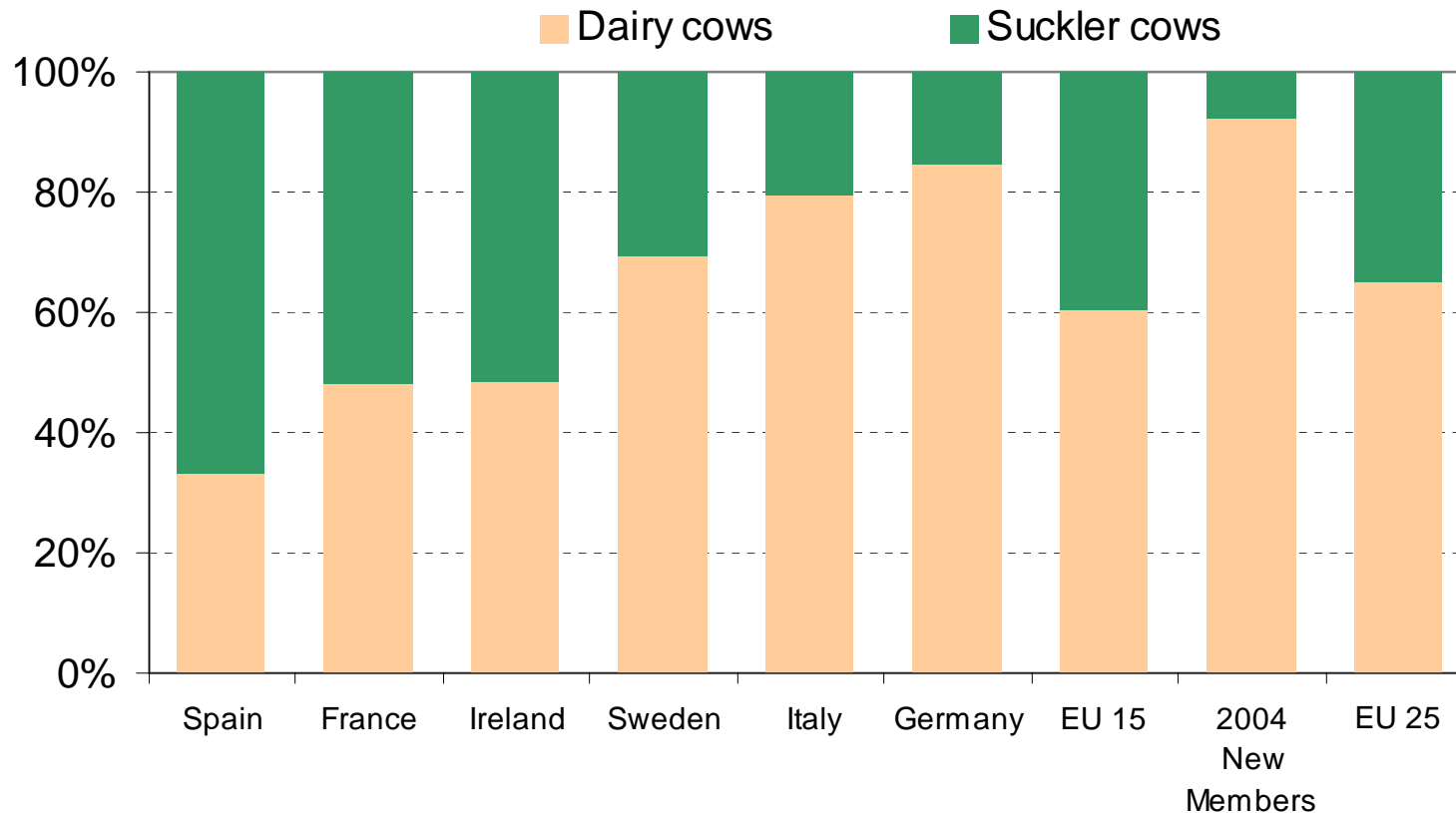
***Beef production affected by political choice. What's next ?***

*Graph from GEB- French Livestock Institute*

**Slide number 4**

# ***1-The place of beef production throughout the EU countries***

## ***Dairy and suckler cows share per countries in 2006***

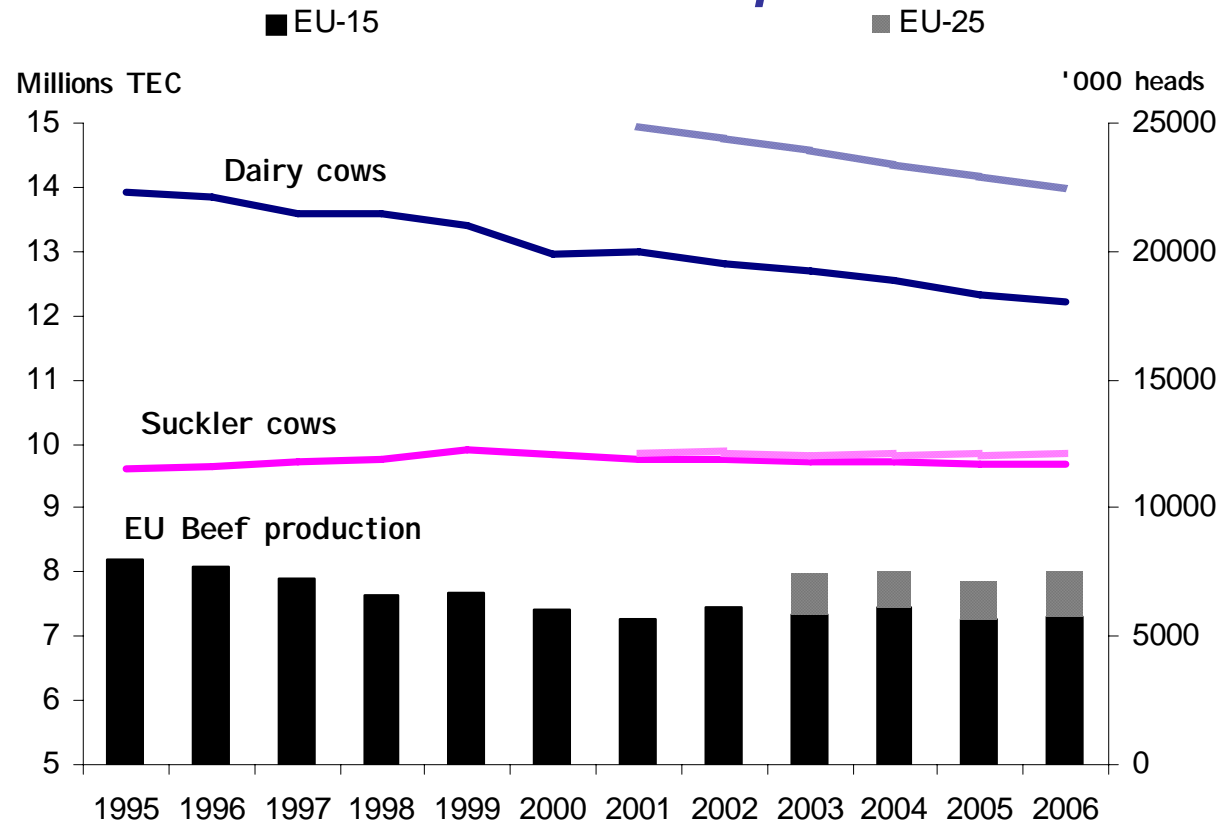


**Source: Eurostat**

- ***Focus on calving, finishing***
- ***Beef as a complementary production***

# ***Dairy production: not the same dynamics as suckler cow production***

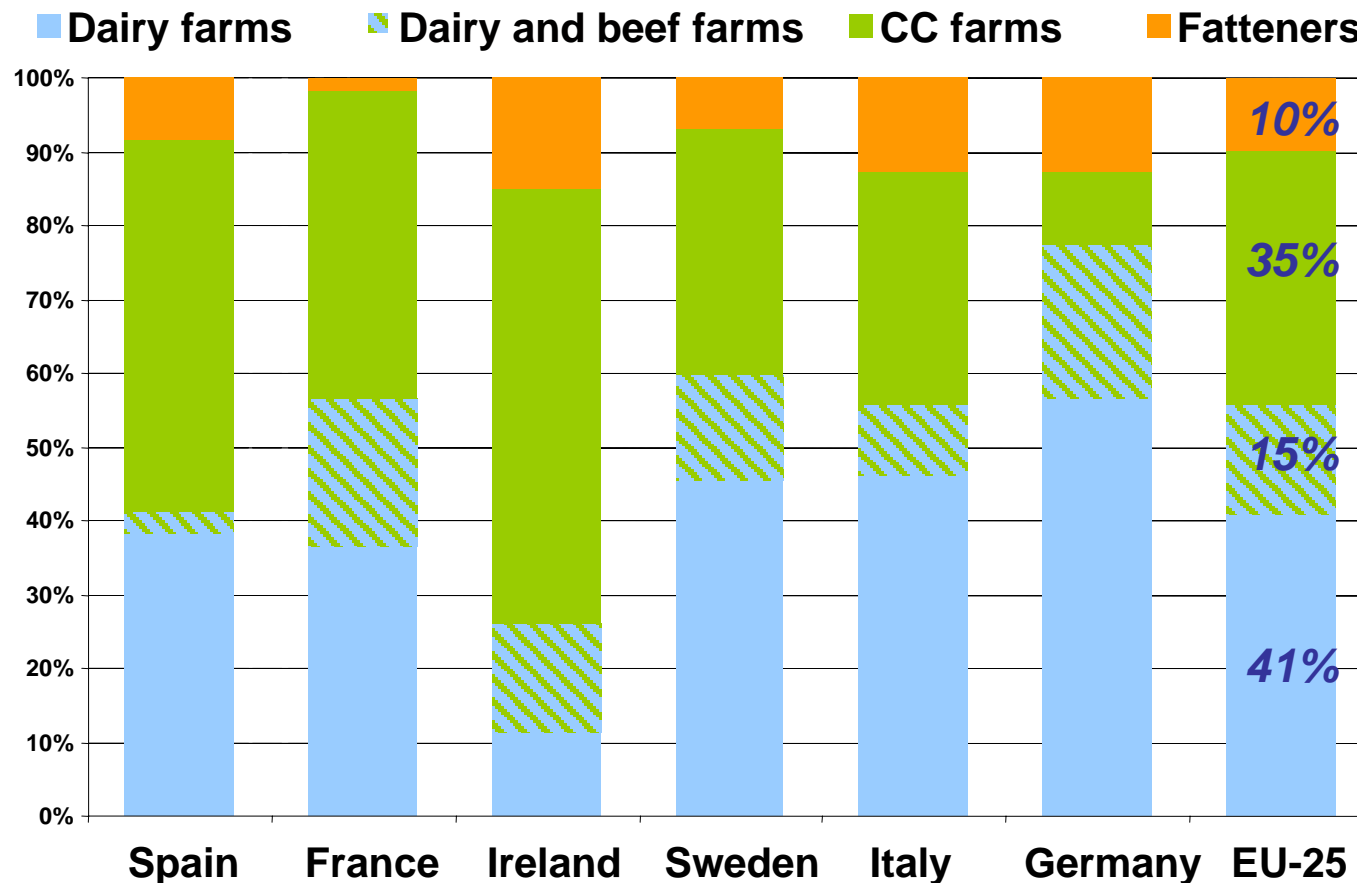
## ***Dairy and suckler cow herds and EU beef production – evolution 1995-2006***



**Source: Eurostat**

➤ ***Decrease of the EU beef production in spite of the stability of suckler cow herd***

## ***BFS share between countries: important diversity in Europe***



Intermediate  
results on 2004  
FADN DG Agri from  
French Livestock  
Institute

***In Europe: Half of farms are dairy farms***

***Cow-calf farms present in Spain, Ireland & France***

***15% of beef producers are dairy+beef : France & Germany***

## ***2- structural phenomena of increasing size and specialization***

- ***Small farms are always numerous (Ireland but also South and East of EU)***
- ***Beef farmers often aged***

### ***Prospects:***

- ***Strong reduction of cattle owners***
- ***Continuous increase of farm size***

### ***Consequences:***

- ***Specialization in order to improve efficiency of labour power and to be more engaged in the market (Italy)***



- ***Beyond the “patchwork” of the CAP implementation main orientations such as decoupling and cross compliance***

### ***Implementation:***

- ***More than half of beef production totally decoupled but two thirds of suckler cows linked to premium***
- ***One case of regional premium : Germany***

### ***Consequences:***

- ***Decoupling = simplification***
- ***Farmers don't integrate new deals completely***
- ***Effects masked by the market evolution***

## ***4- consequences for production (1/2)***

- ***The case of beef production from dairy calves***

### ***Implementation:***

- ***The lack of calves appears to be the main issue for the future and can be reinforced by the conversion of dairy farmers to beef farmers especially in mountainous areas***

### ***Consequences of CAP:***

- ***Decoupling of premium makes it easier to stop bull production in dairy+beef farms***
- ***Steers on grasslands : a new interest to explore***

## ***4- consequences for production (2/2)***

### ***➤ The case of beef production from weaners***

#### ***Implementation:***

- Calving activity sensitive to the decoupling of the suckler cow premium***
- Fattening activity competitiveness sensitive to other cereal production (feeding or energy...)***

#### ***Consequences of CAP:***

- Specialisation of calving and finishing activities***
- Bull fattening to be more integrated***
- Steers on grasslands : a new interest to explore***

## ***5- consequences for land use (1/2)***

- ***Beef production particularly linked to the land use  
Adapted to utilize both high potential areas and  
grasslands not available for crops.***

## ***Consequences for grasslands and mountain uses***

- ***Suckler cow premium coupling = support of livestock  
activity maintenance in the poorest areas***
- ***Suckler cow decoupling in Ireland = till now no effect  
on cow-calf herd because of part time activity  
importance***

## ***5- consequences for the land use (2/2)***

- ***Beef production particularly linked to the land use  
Adapted to utilize both high potential areas and  
grasslands not available for cropping.***

## ***Consequences for crops and intensive forage areas***

- ***Decoupling : conversion to crop for energy ?***
- ***Cross compliance (Nitrate Directive, ...): the limit of  
intensive management (fattening in Spain, France or  
Italy)***

## ***5- conclusion-future issues (1/2)***

### ***The Mid Term Review : a step to a new CAP***

- ***What's next ? And what will be the next impact?***

***Premium decoupling gives more importance to market regulation***

- ***What will be the sensitivity of beef production to the economic cycle ?***

***New competitiveness issues for EU beef production:***

- ***Compete with crops in Europe***
- ***Compete with overseas meat (especially from South America)***

## ***5- conclusion-future issues (2/2)***

### ***The challenge of cost of production:***

- ***Question of management : breeding, feeding...***
- ***Question of equipment : size, labour efficiency...***

### ***To be more efficient in the analysis (BTF)***

- ***More precision of Beef Farming Systems***
- ***Common estimation of the impacts and management changes: survey, simulation***

***Special thanks to the BTF members***



***Thank you for your attention***