



FRENCH HIDE AND SKIN REPORT 2016

OVERALL VIEW

2016 saw a slow recovery of hide prices with better economic conditions prevailing in Europe and the USA. China was active on cow hides for the upholstery market and the shoe business started showing signs of recovery late in the year. Better quality steer selections increased in price as did lower weight heifer hides and calfskins. Europe remains the main outlet for French hides and skins with Italy taking in about 75/80% of all production and China importing about 10% of the French production.

MAIN PRODUCTION FACTS

The French cattle herd is estimated at around 19.5 million head.

The overall French bovine kill was up 0.42% at 3 408 100 head of which 1 823 200 were cows (+3.6%)

French heifers were at 427 000 down 0.4%, steers 181 000 down 1.3% and total bull production ended at 976 900 head- down 4.5%.

French bovine production is expected to increase slightly in 2017(+0.7%) the fourth straight year of positive growth but will not get to levels seen in 2012. The bull kill is expected to decrease slightly (-1.0%). The cow kill should increase about 2% and beef consumption in general is expected to be slightly down at -0.8%. France remains the biggest consumer of beef and veal per habitant per year at 23 kgs each.

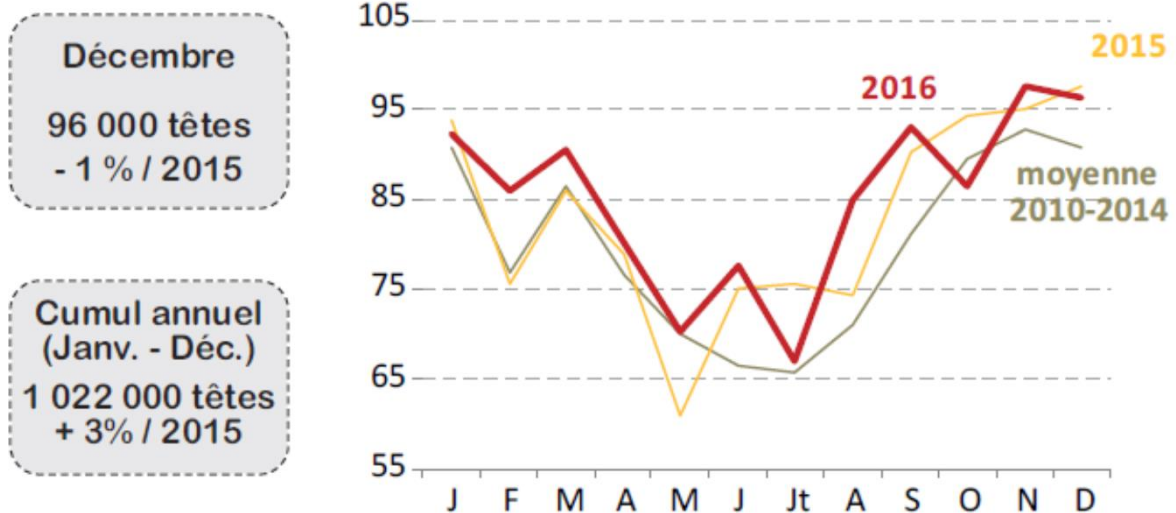
French veal slaughter was steady at 1 284 900 million head, up 0.30%. Production is again expected to be steady in 2017. The French domestic market is under pressure with less demand for premium meats during a time of changing diets and high feeding costs for veal animals.

Ovine slaughter increased in 2016 by 2.5% compared to 2015. Total slaughter 4.3 million, of which 3.7 million lambs and 720 000 goats. The french pig production totalled 23.8 million head up 0.75% compared to 2015.

DAIRY COW SLAUGHTER 2016 + 3% compared to 2015

Abattages français de vaches de type laitier (1000 têtes)

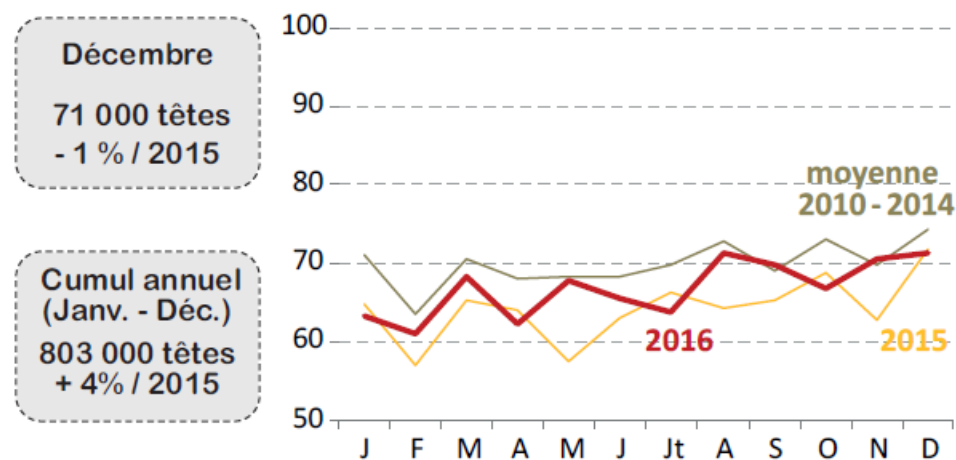
Source : GEB-Institut de l'Élevage d'après Normabev



BEEF COW SLAUGHTER 2016 + 4% compared to 2015

Abattages français de vaches de type viande (1000 têtes)

Source : GEB-Institut de l'Élevage d'après Normabev



EU PRODUCTION AND CONSUMPTION OF BOVINE MEAT EXPRESSED IN THOUSANDS OF TONNES.

ABATTAGES = slaughter expected to rise in Europe about 0.7% in 2017.

Nb habitants = total population, 2017 projected 512 million with conso/hab = meat consumption per person at 15.4 kgs.

PRODUCTION ET CONSOMMATION DE VIANDE BOVINE DANS L'UE À 28

1000 t ^{éc}	2013	2014	2015	2016 <i>e</i>	2017 <i>p</i>	2016 <i>e</i> /15	2017 <i>p</i> /2016 <i>e</i>
Abattages	7 272	7 326	7 583	7 757	7 811	+2%	+0,7%
Imports viande	330	327	320	328	332	+2%	+1,0%
Exports viande	193	241	239	277	290	+16%	+4,8%
Consommation	7 408	7 412	7 664	7 809	7 853	+2%	+0,6%
nb habitants (M^o)	505	507	508	510	512		
Conso/hab. (kg^{éc})	14,7	14,6	15,1	15,3	15,4	+2%	=

e : estimations

p : prévisions

Source : GEB-Institut de l'Élevage d'après Eurostat, SSP et estimations pour l'Italie

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