



SYNDICAT GENERAL DES CUIRS ET PEAUX

FRENCH HIDE AND SKIN ASSOCIATION

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compiled by Nick Winters

ICHSLTA REPORT 2013

OVERALL VIEW

Hide prices again were at historical highs and broke records especially premium veal skins.

Veal skin prices averaged about EUR 8.50/kg salted exw for the traditional 12/16 kgs range.

This is equivalent to USD 160/skin CIF CHINA. Sales of bovine hides to China are steady at around 10% of the French kill. Italy remains the number one buyer of French hides taking about 70% of the total production. France remains the third largest exporter of raw hides with a 7% market share of world exports.

MAIN PRODUCTION FACTS

The French cattle herd stands at 19,179 million head down 0.5%.
The EU 27 state cattle herd is reported at 87,861 million head up 0.2% compared to 2012.
EU 27 state kill expressed in tonnes of beef was down 2.8%.

French Bovine Kill figures ended at 3.336 million head. This is 4.8% below levels of 2012.
(Cumulating a reduction of 10.6% over 24 months)
The biggest drop was on Cows down 10.0% with a total of 1.66 million slaughtered.
Male bovine cattle were up 4.4% with a total of 1.24 million head.
Heifers were down 7.5% at 435 772 head killed and Steers down 11.3% with 179 372 head.

French bovine production is expected to increase slightly in 2014. Farmers will continue to increase dairy herds before the end of the quota system. The Dairy cow kill is expected to increase about 2.5% in 2014. Certain beef cows that were kept for over for slaughter from 2013 to qualify for other subsidies could increase this kill by as much as 6%, with the overall cow kill expected to increase about 4% during the year.
Bull kills expected to increase about 1% with more being slaughtered in the first 6 months.
Overall we expect the French Bovine kill to increase about 3%.

Production costs for calf farmers were extremely high. Milk powder costs increased 29% over the year and sufficient sales of veal meat were hard pushed.
The kill was down 3.5% at 1.332 million head and an average carcass weight of 136 kgs.
2014 will depend on the French domestic consumption of veal meat but we expect the kill to be down another 2.0% which will be the third year in a row in negative territory.

Ovine slaughter reduced in 2013 by 2.9% compared to 2012.
Kill figures as follows: Lambs 3.682 million (-2.9%) Sheep 0.563 million (+0.7%) and Goats 0.779 million (-5.4%). French consumption of ovine meat was down 3% for the year.
The kill is again expected to reduce by 1% this year.
France has the 5th largest herd of sheep and lamb in Europe (5.7 million head) behind :
UK 14.2 million, SPAIN 12.3 million, Greece 6.9 million, Italy 6.3 million.

RAW HIDES & SKINS / FRANCE

