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Situation and Outlook Beef Sector

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This report is based on figures available at the middle of March 1997. In general, figures for 1996 are provisional or estimates. The report does not prejudice in any way the proposals which might be made to solve the problems which may appear from the analysis. The report is available in all Community languages as document SEC(97) 819 final with publication date 16.05.97.

FOREWORD

In late 1995 the European Commission presented its Agricultural Strategy Paper¹ in which it outlined the major challenges European agriculture and its rural areas would be facing at the turn of the century and the implications these might have for future policy developments.

In its working programme for 1997, the Commission announced its intention to present, after the conclusion of the Intergovernmental Conference, a communication on the financial framework from 2000 onwards, to be accompanied by “a very careful look at the future of the Communities policies, in particular the common agricultural policy and structural policies”.

In the light of these orientations, the Directorate-General for Agriculture (DG VI) has undertaken a number of studies, which examine in detail the current situation and the longer term outlook for some of the main agricultural markets, developments in rural areas, and in world markets. These studies are being published as working documents under the common heading *CAP 2000*.

A general overview of agricultural market trends and long term projections of supply and demand for the main commodities is presented in “Long Term Prospects, Grains, Milk and Meat Markets”, accompanied successively by more detailed sector analyses in “Situation and Outlook” reports for the beef, dairy and grain markets and their organisations. A study on rural development under the *CAP 2000* heading will follow.

These reports are aimed at giving a description of the past and current situation in the areas mentioned as well as an outlook of the possible evolution over the next decade, under the assumption of an unchanged agricultural policy and international framework. They are intended as a background to the policy proposals that will be made at a later stage.

In that light the present report on the beef sector is a first part of the answer to the Council’s request of October 1996 to examine the long term situation of the sector and to come forward with new reform proposals.

¹ “Study on alternative strategies for the development of relations in the field of agriculture between the EU and the associated countries with a view to future accession of these countries” (Agricultural Strategy Paper), a communication (CSE(95)607 of 29.11.1995) presented by the Commission to the Madrid European Council in December 1995

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EXECUTIVE SUMMARY

Overview

Annual net production (slaughterings) of beef and veal in the EU-15 has in recent years been close to 8 million t, the largest producers being France, Germany, Italy and the United Kingdom which account for about two thirds of EU output.

At EU level beef(/veal) is with a share of 11.9% the second biggest contributor to the total value of agricultural production.

Before the exceptional circumstances provoked by the outbreak of the BSE crisis in 1996 average per capita beef(/veal) consumption in the EU stood at 20 kg, compared to around 40 kg for pork and 19 kg for poultry. Total beef consumption amounted to 7.5 million t.

EU exports of beef (mainly meat but also a growing proportion of live animals) have consistently exceeded the 1 million t (in carcase weight equivalent) in recent years, while imports have hovered around 450,000 t.

Cattle holdings (dairy and beef combined) in the EU-15 number about 2 million (on a total of 7.8 million agricultural holdings). Since the mid-eighties the number of holdings with cattle in the EU-12 has been declining by about 5% per year, while the average size (expressed in number of animals per holding) has increased. The number of holdings with dairy cows has declined more rapidly. In contrast the number of holdings with suckler cows has increased as the decline in the dairy herd has been (partially) compensated by an increase in the suckler herd, following the introduction of the milk quota in 1984 (at an average rate of 4 suckler cows for 10 dairy cows over the period, although in recent years the rate has been closer to one for one).

With the number of dairy cows declining and the number of suckler cows still increasing in most Member States the importance of specialised beef production, ie coming from beef herds, has been gradually increasing. Some Member States, in particular Spain, France and Ireland and to a lesser extent Portugal, Belgium and the United Kingdom have a relatively important beef orientation. For the EU as a whole, however, still two thirds of beef originates from the dairy herd.

The highest concentrations of cattle in relation to available grassland can be found in Denmark, the Netherlands and parts of France, Italy and Greece. The largest cattle holdings can be found in the new German Länder.

Two thirds of the EU's suckler herd is concentrated in only three Member States - France at a distance followed by the United Kingdom and Spain - while the dairy herd is more evenly spread between the Member States. About 65% of the suckler herd is kept in less favoured areas.

The more intensive bull production tends to be concentrated in Germany and Italy, which together account for nearly half of the EU's bull output, while the generally

more extensive steer production is mainly limited to the UK, Ireland and France. Female beef production, ie from heifers and cows, is more widely spread.

The Common Market Organisation

The basic regulation establishing the market organisation for beef dates back to 1968. The beef support system comprises the following two main elements:

- market support in the form of border protection, intervention buying and export refunds;
- direct payments in the form of headage premiums for male bovines and suckler cows.

The latest major revision of the regime was part of the 1992 CAP reform, when it was decided to reduce market support compensated by an increase in the headage premiums. The main premiums for beef producers, the suckler cow premium and the special premium for male animals, were increased in three steps to compensate for the reduction in the intervention price. In addition a deseasonalisation premium and a supplemental amount for extensification were introduced. For supply control and environmental reasons the suckler and special premiums were tied to historical references and subject to a maximum stocking density phased in over three years.

Budget expenditure on beef for the first time exceeded the 4 billion ECU mark in the early nineties, when production reached a high, accounting for 14% of total EAGGF Guarantee expenditure (ie slightly more than the share of beef in the total value of agricultural production). Expenditure then declined until 1994 as production decreased (and thus expenditure on intervention), but has since been rising again as the full impact of higher premiums is felt. In 1996 additional expenditure, directly or indirectly related to the BSE crisis, arose and will continue in 1997, bringing the share of beef in total expenditure and in absolute terms to a historically high level.

The Market Outlook

The expected pattern of consumption as well as production for 1996 was perturbed by the outbreak of the BSE crisis in March that year. For the year as a whole, consumption dropped by a little over 7% from the 1995 level (or over 0.5 million t) with per capita consumption dropping to 18.6 kg.

On the supply side, the decision to eliminate adult cattle of over 30 months in the UK from the food/feed chain led to a reduction in the expected production for 1996 of over 300,000 t. More than a million animals went into the scheme in 1996.

The drop in production was not sufficient to balance out the drop in consumption, resulting in intervention purchases exceeding the original 400,000 t limit for 1996.

For the coming years balance in the beef market will depend on the impact on supply of the emergency measures adopted in the latter half of 1996 (ie the calf processing

and early marketing of veal calves schemes) and of the over thirty months scheme (OTMS) and on the degree of recovery of consumption.

The greatest impact of the calf measures will be felt in 1998 and 1999, reducing beef production by about 200,000 t in each of those years to which can be added about 200,000 t from the OTMS. The effect of the measures accentuates the already downward move in the beef production cycle after 1996.

As far as the effects of the BSE crisis on consumption are concerned the assumption is that the measures taken to prevent possible contamination of the food chain and to eradicate the disease, as well as to improve consumer information through labelling of meat and identification of animals, are helping to restore consumer confidence and that consumption will gradually recover (ie per capita beef consumption returning to its long term trend by 2001).

The reduced production and gradual recovery of consumption from the 1996 shock in the coming years would allow an important destocking from the levels built up during 1996 and 1997. After 2001 however, as production would return to its normal potential and consumption would continue its long term decline, stocks would tend to accumulate again (given the GATT limited export possibilities) and reach 1.5 million t by 2005.

The projected price gap between the EU and other major exporters, although decreasing over the forecast period, would remain too big to allow unsubsidised EU exports.

1. MAIN ECONOMIC AND STRUCTURAL FEATURES

1.1 Production and consumption

Annual net production (slaughterings) of beef and veal in the EU-15 has in recent years been close to 8 million t, the largest producers being France, Germany, Italy and the United Kingdom which account for about two thirds of EU output. Around 37% of meat in the EU beef/veal sector in volume terms is bull production with Germany, Italy and France as main producers, 28% cow beef (France, Germany, Netherlands), 15% heifer beef (UK, France, Germany) and 10% from steers (UK, Ireland, France). Veal represents about 10% of the total, with production concentrated in France, Italy and the Netherlands.

At EU level beef(/veal) is with a share of 11.9% the second biggest contributor to the total value of agricultural production (after dairy with a share of 18.4% in 1995). In particular in Ireland, Luxembourg and Austria the beef sector generates a high proportion of agricultural sales.

Beef/veal production and consumption by MS in 1995							
	(net) production			consumption			self-sufficiency
	000 t	EU share %	share final prod %	000 t	EU share %	pc cons kg	
France	1683	21.1%	14.7%	1636	21.9%	28.2	103%
Germany	1408	17.7%	12.6%	1350	18.1%	16.6	104%
Italy	1181	14.8%	10.2%	1483	19.8%	25.9	80%
United Kingdom	974	12.2%	13.6%	1038	13.9%	17.7	94%
Netherlands	580	7.3%	9.6%	307	4.1%	19.9	189%
Spain	509	6.4%	7.7%	481	6.4%	12.3	106%
Ireland	480	6.0%	37.1%	55	0.7%	15.5	865%
Belgium	349	4.4%	15.2%	215	2.9%	21.2	163%
Austria	196	2.5%	17.2%	159	2.1%	19.8	123%
Denmark	185	2.3%	7.1%	92	1.2%	17.7	201%
Sweden	143	1.8%	11.3%	161	2.1%	18.2	89%
Portugal	104	1.3%	7.8%	174	2.3%	17.6	59%
Finland	96	1.2%	11.0%	98	1.3%	19.1	98%
Greece	71	0.9%	2.9%	221	3.0%	21.2	32%
Luxembourg	7	0.1%	28.9%	9	0.1%	21.2	85%
EU-15	7966	100%	11.9%	7479	100%	20.1	107%

Source: DG VI Meat Outlook Group

Before the exceptional circumstances provoked by the outbreak of the BSE² crisis in 1996 annual consumption of beef and veal in the EU-15 was dropping by about

² Bovine Spongiform Encephalopathy or "mad cow disease", a fatal disease of the central nervous system of cattle, first identified in the UK in 1986. The latest BSE crisis was sparked by the announcement

200,000 t in recent years to a level of 7.5 million t in 1995. Average per capita consumption in the EU dropped over a three year period from 21.5 to 20 kg in 1995 (compared to around 40 kg for pork and 19 kg for poultry in the same year). In 1996 another 1.5 kg were lost due to the BSE crisis. A more detailed picture of supply and demand trends is given in the section on the market outlook.

On a global scale the EU is the second largest beef producer after the US, which produce in the range of 11 to 12 million t. World production exceeds 55 million t.

EU exports of beef (mainly meat but also a growing proportion of live animals) have consistently exceeded the 1 million t (in carcase weight equivalent) in recent years, while imports have hovered around 450,000 t. The EU and Australia are the largest exporters of beef in the world, with each accounting for about one fifth of global exports estimated at around 5 million t. Of the different meats beef is the most internationally traded commodity in both absolute and relative terms (ie to production).

Major players on the world beef scene					
1995	production	consumption		exports	imports
	slaugh. mio t cwe	mio t cwe	kg per capita	mio t cwe (l+m)	mio t cwe (l+m)
US	11.6	11.7	44.6	0.9	1.6
EU-15	8.0	7.5	20.1	1.2	0.4
Brazil	5.1	4.9	31.3	0.3	0.2
China	4.2	4.0	3.3	0.1	-
Argentina	2.5	1.9	56.3	0.6	-
Australia	1.7	0.6	34.0	1.1	-
Japan	0.6	1.6	12.8	-	1.0
world	55.3		9.7	4.7*	

Source: EU Meat Outlook Group, other countries GIRA, world FAO

* excluding live exports

1.2 Structure and regional distribution of cattle production

Cattle holdings (dairy and beef combined) in the EU-15 numbered 2.1 million in 1993 (on a total of 7.8 million agricultural holdings). Of the 1.9 million cattle holdings at EU-12 level, 47% specialised in beef. For the EU-12 the average number of other (ie mainly suckler) cows per holding amounted to 14 compared to 21 dairy cows per holding, however with wide variations between Member States.

On average for the EU over 60% of holdings with suckler cows have less than 10 and in Greece and Portugal even 80 to 90% of holdings have less than 10 suckler

in March 1996 by the UK government of a possible link between a new variant of Creutzfeldt-Jakob Disease, a fatal human brain disease, and exposure to BSE infected beef.

cows. However, more than 50% of the EU suckler herd is held in holdings with 30 or more suckler cows (in the UK even more than two thirds of the herd is held in the larger holdings).

Structure of cattle holdings EU-15 1993									
000	all cattle			dairy cows			other cows		
	holdings	animals	av. size	holdings	animals	av. size	holdings	animals	av. size
France	348	20098	58	169	4613	27	205	3950	19
Germany	350	16194	46	236	5364	23	65	505	8
United Kingdo	140	11709	84	40	2786	69	76	1760	23
Italy	279	7459	27	147	2287	16	73	648	9
Ireland	155	6308	41	47	1274	27	91	928	10
Spain	246	5001	20	148	1371	9	102	1199	12
Netherlands	60	4797	80	43	1804	42	11	99	9
Belgium	52	3232	63	25	702	28	28	490	18
Denmark	34	2195	65	18	714	40	14	124	9
Portugal	188	1322	7	99	375	4	50	239	5
Greece	51	608	12	39	219	6	10	87	9
Luxembourg	2	205	90	2	51	33	2	28	15
EU-12	1904	79129	42	1013	21559	21	726	10057	14
Austria	123	2350	19	116	898	8			
Finland	61	1360	22	47	490	10			
Sweden	45	1807	40	20	525	26			
EU-15	2133	84645	40	1196	23471	20			

Source: Eurostat (Quarterly statistics on animal production and structural survey)

Since the mid-eighties the number of holdings with cattle in the EU-12 has been declining by about 5% per year, while the average size (expressed in number of animals per holding) has increased by around 4% per year. The number of holdings with dairy cows has declined more rapidly (7% per year). In contrast the number of holdings with suckler cows has increased by 2% per year as the decline in the dairy herd has been (partially) compensated by an increase in the suckler herd, following the introduction of the milk quota in 1984 (at an average rate of 4 suckler cows for 10 dairy cows over the period, although in recent years the rate has been closer to one for one). The number of dairy cows and of suckler cows per holding have both increased by about 4% per year.

The graph on the next page shows the evolution of the cattle herd in the EU and the increasing share of other cows after 1984.

With the number of dairy cows declining and the number of suckler cows still increasing in most Member States the importance of specialised beef production, ie coming from beef herds, has been gradually increasing. Some Member States, in particular Spain, France and Ireland and to a lesser extent Portugal, Belgium and the

United Kingdom have a relatively important beef orientation³. For the EU as a whole, however, still two thirds of beef originates from the dairy herd.

For a regional distribution of cattle (dairy and beef combined) see the attached maps. The highest concentrations of cattle in relation to available grassland can be found in Denmark, the Netherlands and parts of France, Italy and Greece. The largest cattle holdings can be found in the new German Länder (see map).

Two thirds of the EU's suckler herd is concentrated in only three Member States - France at a distance followed by the United Kingdom and Spain - while the dairy herd is more evenly spread between the Member States (see also annex 3). About 65% of the suckler herd is kept in less favoured areas.

At the regional level high numbers of suckler cows can be found in Ireland, Scotland and Northern Ireland, several French regions (Midi-Pyrénées, Pays de la Loire, Limousin, Bourgogne and others), Spanish regions (Castilla-Leon, Extremadura), Wallonia in Belgium and Denmark. Relatively high concentrations of suckler cows (number of animals in relation to the available grassland), ie more than 0.5 suckler cows/ha of meadows and pastures⁴, can be found in Denmark, Belgium and several French regions. In the Greek regions there are very few suckler cows, but also nearly no meadows and pastures, resulting in a high density (see map).

In the regions with on average the larger suckler operations such as Scotland, Bourgogne, Extremadura, and some new German Länder holdings typically have between 30 and 40 suckler cows, while for dairy holdings the numbers are much higher ranging from 60 to over 100 dairy cows (see map).

The more intensive bull production tends to be concentrated in Germany and Italy, which together account for nearly half of the EU's bull output, while the generally more extensive steer production is mainly limited to the UK, Ireland and France. Female beef production, ie from heifers and cows, is more widely spread. See also annex 3.

1.3 Cattle production and environment

Rearing of beef cattle will have direct impacts on the wider environment, both positive and negative. The impact will be conditioned by the type of beef production system and the relationship with other enterprises on the farm competing for the same resources (eg dairy, sheep, cropping).

³ The composition of the reproductive herd (dairy vs. suckler) can give an indication of the degree of dairy or beef orientation, although live trade can alter the picture. Italy, for example, is traditionally an important importer of animals for domestic fattening.

⁴ For suckler cows the concentration at NUTS II level does generally not exceed 1 animal/ha, while for dairy cows it can go up to 3.6 animals/ha, ie in Denmark.

On the positive side beef cattle can play an important role in maintaining the correct level of grazing pressure and the right balance with other grazing animals throughout the year in semi-natural habitats and contribute positively to the visual impact of cattle grazing in the countryside.

The direct impact on resources - land(scape), water, and air and the biological diversity associated with them- depends to a large extent on the stocking density and the potentially polluting inputs needed to sustain this density. Effects are generally adverse where farming intensity is greatest (either through overstocking or being housed in large concentrations).

Where stocking densities (of all grazing animals) exceed the natural carrying capacity of the land, in particular in semi-natural habitats, overgrazing can occur. Estimates indicate that this is the case for 5% of the EU's agricultural area (or 6 to 7 million ha). Overgrazing problems seem however to be more related to high sheep densities than to cattle densities.

All cattle produce waste, which can be used as natural fertilisation when the animals are grazed (at not too high stocking rates), but leads to a concentration of waste when the animals are housed with water, air and soil pollution risks. Ammonia is produced in the urine and contributes to acidification. Cattle also produce methane, a greenhouse gas, and is seen by some researchers as a significant contributor to global warming, second only to carbon dioxide⁵.

Cattle and silage effluent can be an important source of water pollution, the nitrates and phosphorous contained in the effluent leading to eutrophication. The map on the following page shows the nitrogen produced by cattle (dairy and beef combined) for the different regions of the EU. When just taking cattle into account (to that should be added other sources such as pig and poultry production for the full impact) the end target norm of not more than 170 kg N/ha from organic sources⁶ as laid down in the Nitrate Directive is exceeded in parts of Belgium and the Netherlands and nearly reached in some other important cattle regions in the UK, Germany, Spain and Italy.

⁵ Carbon dioxide is the most abundant trace (greenhouse) gas and it is expected to cause about half of the global warming in the next century. Methane (CH₄) is considered to be the second most important greenhouse gas and is expected to contribute some 18% of future warming. The major sources of atmospheric methane are natural wetlands, rice paddies and enteric fermentation, in particular by ruminants. They contribute approximately 20, 20 and 15% respectively to the total methane flux, although these estimations are subject to large variation. In Europe agriculture is estimated to contribute about a third to the anthropogenic (man-made) CH₄ emissions, stemming almost completely from animal production (70% digestion, 30% manure stores). The methane flux from ruminants depends to some extent on feeding patterns, mainly grass fed animals in general producing somewhat more CH₄ per kg of milk or beef than mainly concentrate fed animals.

⁶ From December 1998 to December 1999, the last year of the 4 year action programme, the norm of 210 kg must be reached, while the end norm of 170 must be reached for the year running from December 2002 to December 2003, the last year of the next 4 year programme.

2. THE COMMON MARKET ORGANISATION FOR BEEF

The basic regulation establishing the market organisation for beef dates back to 1968. The beef support system comprises the following two main elements:

- market support in the form of border protection, intervention buying and export refunds;
- direct payments in the form of headage premiums for male bovines and suckler cows.

The latest major revision of the regime was part of the 1992 CAP reform, when it was decided to reduce market support compensated by an increase in the headage premiums.

2.1 Market support

2.1.1 Border regime

With the implementation of the GATT Uruguay Round agreement import levies have been replaced by tariff equivalents, which for beef (with the exception of preserved meat) consist of a combination of an ad valorem duty and a specific amount per tonne to be reduced by 36% over the 6 years of implementation.

Border protection beef sector					
		base rate	1995	2000	reduction
live animals	ad valorem	16.0%	15.0%	10.2%	36%
	specific (ECU/t)	1454	1367	931	36%
beef meat	ad valorem	20.0%	18.8%	12.8%	36%
	specific (ECU/t)	2763	2597	1768	36%
preserved meat	ad valorem	26.0%	24.4%	16.6%	36%

Source: EU schedule

A safeguard clause, allowing for an increase in custom duties, applies in case of import surges or a drop in import prices below certain trigger points.

To comply with the market access commitments, ie maintaining current access and offering minimum access opportunities, the following annual tariff quotas apply over the implementation period:

Market access beef sector		
	quota (000 head or t)	in-quota tariff
<i>Current access:</i>		
live animals (adult)	10	4-6%
live animals (calves)	169	16% + 582 ECU/t
beef meat*	144	20%
<i>Minimum access:</i>		
beef meat*	20	20%

Source: EU-15 schedule

*product weight

Preferential access has also been granted to the associated countries of central Europe in the framework of the Europe Agreements⁷.

Beef concessions Europe Agreements							
		tariff quota (000 head or t)				in-quota tariff	
		1996/97	1997/98	1998/99	1999/2000		2000/2001
live	< 300 kg	331.0	331.0	331.0	331.0	331.0	20 % of MFN
	breeding	7.0	7.0	7.0	7.0	7.0	6% ad valorem
meat		34.7	36.4	38.4	40.4	42.4	20 % of MFN

Source: Europe Agreements, Interim Agreement Slovenia

So far these countries have had difficulties to make full use of their quotas because their herds have been liquidated to a large extent during the transition to market economies and they are only now starting to rebuild them. For the medium term increased imports from these countries should not be excluded.

For live animals (weighing less than 300 kg) a total import ceiling of 500,000 head (excluding animals for breeding purposes) is applied.

The level of protection for fresh or frozen beef and live animals is such that (even after the 36% reduction) only preferential imports can enter. Preserved meat of bovine origin (eg corned beef) is relatively less protected and makes up an important part of total imports (up to a third in carcase weight equivalent).

⁷ Poland, Hungary, Czech Republic, Slovak Republic, Romania, Bulgaria, Latvia, Lithuania, Estonia and Slovenia.

The export commitments in outlay and volume under the GATT agreement can be summarised as follows:

Export commitments beef sector										
	base		1995			2000			reduction	
	outlay (mio ECU)	volume (000 t)	mio ECU	000 t	ECU/t	mio ECU	000 t	ECU/t	outlay	volume
beef meat	1959	1040	1923	1137	1691	1254	822	1526	36%	21%

Source: EU-15 schedule

Both preferential imports and subsidised exports are managed through certificates allocated (against a guarantee) to EU traders. The level of the export refund according to product and destination is periodically fixed through the Management Committee procedure.

2.1.2 Intervention

Following the 1992 reform the intervention price has been decreased by 15% in three steps to 347.5 ECU/100 kg carcass weight (R3 quality adult male bovines) from 1 July 1995 onwards⁸. A two-tiered system applies, tendering for normal intervention being opened in a Member State when the average EU market price for certain categories (U, R and O males, bulls and steers taken separately)⁹ drops below 84% of the intervention price and below 80% for these categories for two consecutive weeks in the Member State concerned. The annual ceiling for normal intervention buying in was originally set at 550,000 t in 1995, 400,000 t in 1996 and 350,000 t from 1997 onwards. Following the BSE crisis the ceilings for 1996 and 1997 were lifted to 550,000 and 500,000 t and set at 350,000 t from 1998 onwards.

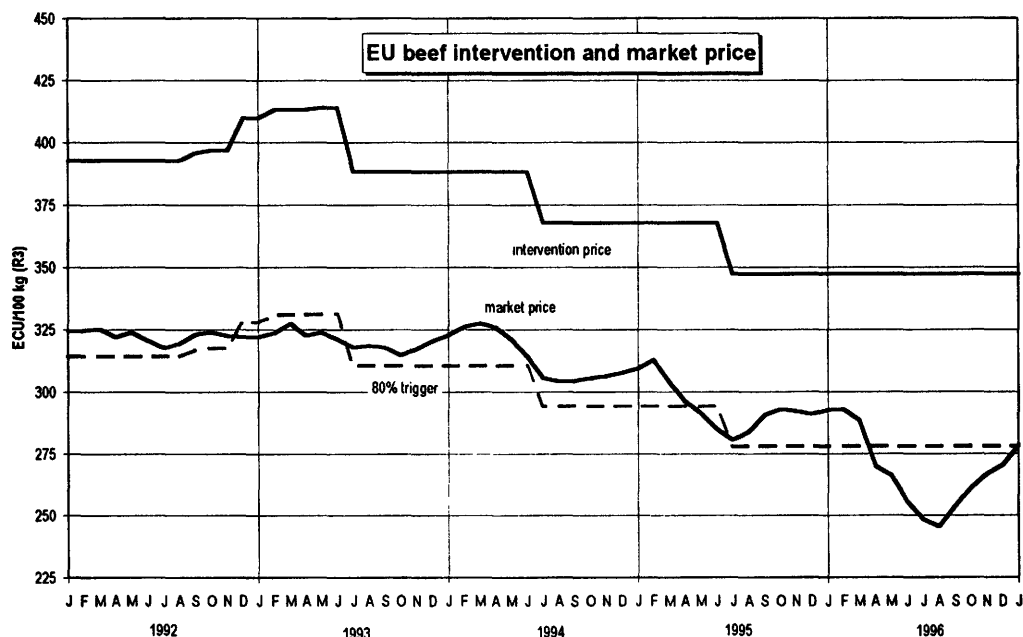
Safety net intervention in a Member State can take place when the average EU market price drops below 78% of the intervention price and below 60% for two consecutive weeks in the Member State concerned.

As production declined in recent years, no intervention purchases took place between the end of 1993 and the beginning of 1996. The maximum carcass weight for sales into intervention was set at 340 kg from July 1994 onwards.

⁸ Since 1996 prices and payments (including headage premiums) are set in new "green" ECU, the old switch-over mechanism having been abolished. Currently, the average EU difference for beef between the green and the market ECU is about 2.5%, while it used to be 20.8%.

⁹ Only beef from male bovines is allowed in to intervention.

With the outbreak of the BSE crisis in March 1996 intervention was reopened under more flexible conditions (a greater range of quality grades and higher slaughterweights admitted) to support the market. Over the remaining part of 1996 over 400,000 t were bought in, and the expectation is that up to 300,000 t will be purchased in 1997.



As can be seen from the graph, beef prices dropped quite dramatically after March 1996, triggering the large scale intervention purchases. The lowest point was reached in August when the average EU market price for bull and steer meat of R3 quality dropped to close to 70% of the intervention price. In the second half of the year prices started to recover again to reach 80% of the intervention price by the end of the year.

The common market organisation for beef also has a provision for aid to private storage, which was last applied in 1989. Under last year's special circumstances a private storage scheme to support the veal market (which also suffered a backlash from the BSE crisis) was introduced.

As part of the 1992 reform measures to regulate supply Member States had the option of introducing either a lightweight intervention scheme for male bovines of 150 to 200 kg (this was however suspended in 1993¹⁰) or a calf processing premium for 10 day old male dairy calves. At the time only Portugal opted to operate the latter scheme, but did not apply it until recently. Also for the UK, which after the beef export ban was imposed in early 1996 could no longer ship its calves to the veal producing Member States, the measure became relevant.

¹⁰ The scheme was revived in the Autumn of 1996, but had little effect.

In November 1996, in the light of the market imbalances the beef sector was facing following the BSE crisis, the Council decided to revive the measures in modified and mandatory form for all Member States. They had to choose to apply either the calf processing scheme or an early marketing scheme for veal calves (or both).

The processing premium of 120 ECU for (now up to 20 day old) male dairy calves was maintained and a premium of 150 ECU for beef calves introduced. Four Member States (UK, IRL, F, P) are applying the calf processing scheme. The other Member States have opted for the early marketing scheme, which awards a basic premium of 50 ECU for veal calves slaughtered at a weight 15% below the 1995 national average¹¹. France and Portugal are applying both schemes.

The schemes are intended to reduce the availability of calves for beef production (thereby lowering beef supplies in 1 to 2 years time) and have been agreed in principle for two years (1997 and 1998, reducing availability of calves for beef fattening by about 1 million head each year).

2.2 Headage premiums

Following the 1992 reform the main premiums for beef producers, the suckler cow premium and the special premium for male animals, were increased in three steps to compensate for the reduction in the intervention price. In addition a deseasonalisation premium and a supplemental amount for extensification were introduced.

For supply control and environmental reasons the suckler and special premiums were tied to historical references and subject to a maximum stocking density phased in over three years.

2.2.1 Suckler cow premium

From 1995 onwards this premium has been set at 144.9 ECU per year per cow¹². Member States have the option of paying up to 30.2 ECU to supplement the Community premium.¹³

¹¹ As a transitional measure top ups of the basic premium are available during 1997 for the lower average slaughterweights (30 ECU for slaughterweights less than 110 kg in the first half of the year, reduced to 15 ECU in the second half, and 15 ECU for slaughterweights between 110 and 120 kg in the first half, reduced to 7.5 ECU in the second half of 1997).

¹² Following the sharp drop in prices after the outbreak of the BSE crisis in March 1996 the Council decided to grant an additional aid of 850 million ECU to beef producers following two models, one based on a top up payment to the 1996 premiums and in part as a sum to be distributed by the Member States, the second model giving a maximum of flexibility to Member States. The suckler cow premium was increased by 27 ECU and the special premium by 23 ECU, while the remainder was to be distributed by the Member States with a national envelope fixed for each Member State. Furthermore Member States could add, on a national basis, a similar amount in cases where the Community aid did not fully address the problems of certain producers. Finally, in December 1996, the Council decided on an additional 500 million ECU support package for the beef and veal sector.

To qualify for the premium producers have to adhere to a 6 month retention period, beginning on the day after the date of application.

Producers with mixed (dairy/beef) herds can only claim the premium for their suckler cows if their milk quota does not exceed 120,000 kg.

An eligible cow must be a pure beef or beef cross dairy cow. Pure bred dairy cows put to a beef bull are excluded.

Individual ceilings apply to the number of premiums a producer can claim. (All Member States, except Greece, chose 1992 as reference year to determine premium rights).

Transfer and temporary leasing of premium rights with or without land between producers are possible in most Member States under certain conditions. Only in France any change in premium rights has to be effected through the national reserve.

The number of suckler cows receiving a premium amounted to 9.3 million in 1993 and 9.2 million in 1994 covering 90 to 86% of the EU-12 suckler herd. In 1995 the number of suckler cows receiving a premium again increased to 9.3 million (EU-12) and 9.7 million (EU-15), covering about 85% of the herd. The number of unused rights has hovered around 15% in the three years 1993-1995 (or 1.7 million for the EU-15), due to the reluctance on the part of producers to sell or lease unused rights, the existence of national reserves and stickiness in the transferability of rights, and premium ceilings set relatively high for some countries.

The suckler herd has continued to expand slightly faster than the number of premiums paid and in 1995 for the first time exceeded the premium ceiling at EU level, indicating a certain interest for producers to keep suckler cows without premium. This could, in particular, be dairy producers, who limited by the quotas can use spare capacity (such as stables and grazing area) at low marginal cost.

The December 1996 survey shows that at EU level the progression of the suckler herd has continued and that the premium ceiling is now exceeded by 3% at EU-12 level and by 1% at EU-15 level. Over time the number of suckler cows held without premium (currently about 15% of the EU herd) could be expected to depend on the general market conditions in the beef (and dairy) sector.

A more detailed overview of premium payments and herd developments is presented in annex 1.

2.2.2 *Special premium*

The premium was originally granted twice in the life of each male bovine animal (ie bulls and steers), the first payment at the age of 10 months and the second after reaching 22 months. To counter the tendency to hold on to animals (in particular

¹³ For Greece, Portugal, Ireland and Northern Ireland and other objective 1 regions the EU funds the first 24.2 ECU of the national supplement. Four Member States - Denmark, Germany, Netherlands and UK (excluding NI) do not grant the national supplement.

bulls) longer than required to attain the commercially desired slaughterweight, the Council decided to abolish the payment for the second age bracket for bulls from 1997 onwards.

The animal must be held for fattening by the producer for a two month retention period (starting the day after application). Applications for the first payment can be made for animals between 8 and 20 months of age, and for the second payment for animals (ie steers) of at least 21 months. Member States decide whether to grant the premium on the farm or at the time of slaughter.

In 1995 and 1996 the special premium amounted to 108.7 ECU. For 1997 the single payment for bulls was increased by 24% to 135 ECU as compensation for the loss of the second payment.

Claims are subject to a maximum of 90 head for each of the age brackets on each holding. In addition regional ceilings apply to the total number of premium claims in the first age bracket. If the ceiling is exceeded in any year, all claims are scaled back proportionately.

As for suckler cows Member States had the possibility in the 1992 reform to choose 1992 as reference year to establish the regional ceilings. In 1994 the Council concluded that taking 1992 as reference year had given rise to a certain lack of balance in the distribution of regional ceilings and decided to partially redistribute and to reduce the global EU-12 ceiling from 11.5 million head (applicable in 1993 and 1994) to 10.3 million head (applicable from 1995 onwards). For EU-15 the ceiling was set at 11.2 million head. A further temporary reduction for 1997 and 1998 in the ceiling to 9 million head (EU-15) was decided by the Council in November 1996.

In 1993 EU-12 first age bracket premium payments amounted to 6.4 million (56% of the ceiling), increasing to 7.9 million in 1994 (68% of the ceiling). In 1995 the number of first premiums rose further to over 8 million for the EU-12 and to 8.9 million for the EU-15. Of the number of males (bulls and steers) slaughtered 60 to 80% were covered by the premium in 1993, 1994 and 1995 at the EU level, with however wide variations between Member States due to live trade (animals receiving a premium in one Member State and being slaughtered in another) and differences in the constraining effect of the 90-head limit and the density clause, related to differences in the size and intensity of cattle production.

The second payment was received by 3 million animals in 1993 (about a third of males receiving a premium) and by 2.6 million animals in 1994 (a quarter of males receiving a premium). In that year a third of the second payments at the EU level were for bulls, although in the majority of Member States it was close to 100%, steers being concentrated in Ireland, the UK, France and Luxembourg. In 1995 the number of second premiums amounted to 2.8 million for the EU-12, with the second payment going to a fifth of the males receiving a premium and with 30% of the second payment for bulls. At EU-15 level the second premium was paid to over 3 million males (of which 35% bulls).

A more detailed overview of the male premium payments is presented in annex 1.

2.2.3 *Deseasonalisation premium*

This premium was introduced to encourage a spread over the year of slaughterings in Member States (mainly Ireland and Northern Ireland in the UK), where, due to predominantly grass based production systems, slaughterings tended to be concentrated in the autumn.

Until last year, when the number of steers slaughtered in a Member State between 1 September and 30 November exceeded 40% of steer slaughterings in the previous year an additional premium of 72.5 ECU was payable on animals having received the special premium and slaughtered between 1 January and 30 April or mid-June in the case of Ireland (in the latter case the premium was progressively scaled down from April to June to avoid a concentration of slaughterings in the last months).

For 1995 and 1996 Ireland qualified for the premium¹⁴, while Northern Ireland already no longer qualified in 1995 and 1996, although production circumstances remained similar to Ireland (leading to tensions between border regions and alleged illegal animal moves). In 1996 the Council decided to lower the threshold to 35% of annual steer slaughterings and to link Ireland and Northern Ireland (granting the premium even if one does not reach the threshold) and gave the Member State the option to continue to pay the deseasonalisation premium even if the trigger is not reached, but then financed from a reduction in the second steer premium. Under the new rules Ireland, Northern Ireland, Germany and Sweden will qualify in 1997.

In 1993 around 340,000 steers received the premium and in 1994 around 297,000. In 1995 this number increased to 307,000.

2.2.4 *Stocking density/Extensification*

From 1996 onwards premium claims for suckler cows and male bovines cannot exceed 2 livestock units (LU) per forage hectare. Producers with up to 15 LU are exempt from these stocking density criteria. In calculating the density the number of suckler cows, male bovines and ewes for which a premium has been requested is taken into account, as well as the number of dairy cows corresponding to the milk quota of the producer .

Member States have the option of applying appropriate environmental measures corresponding to the specific situation of the land used for the production of male bovine animals or suckler cows qualifying for premiums. So far only the UK has decided to apply environmental conditions, ie to prevent overgrazing by restricting livestock numbers receiving a premium to the carrying capacity of the land.

For producers with a stocking density of less than 1.4 LU/ha the suckler and male premiums were increased by 36.2 ECU. Following the BSE crisis the Council decided to provide an extra incentive for extensive producers from 1997 onwards by increasing the additional amount to 52 ECU for those producers with a stocking density below 1 LU/ha.

¹⁴ Also Germany and Denmark qualified, but the number of animals concerned is small.

In 1993 11.6 million and in 1994 12.2 million animals in the EU-12 received the extensification supplement, representing about 62% of all bovines (suckler and male) with a premium. In 1995 the number increased to 12.7 million animals at EU-12 level (63% of all bovines receiving a premium) and to 13.5 million at EU-15 level (62% of all bovines receiving a premium; see also annex 1).

Once the administrative checks have taken place Member States can pay an advance equal to 60% of the suckler and male premium (in 1995 the advance for the male premium was increased to 80% and in 1996 to 80% for both premiums).

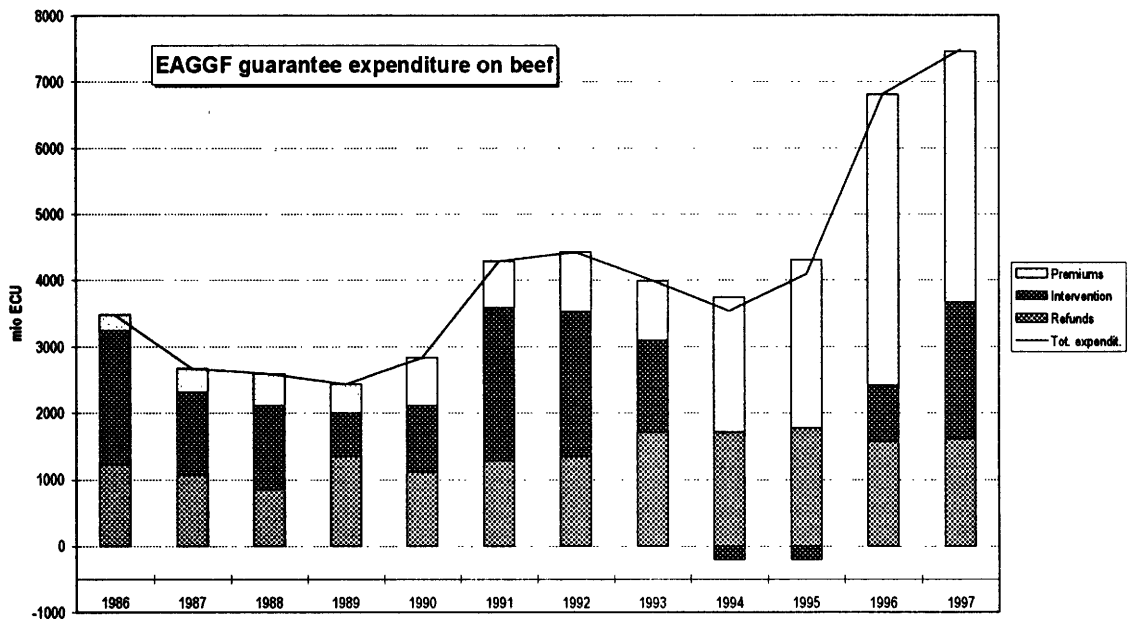
With the increase in premiums and cut in support prices since the introduction of the 1992 reform the combined premiums now represent on average about 14% of market plus premium revenues of producers in the EU (see final table of annex 1). When the compensatory allowances for less favoured areas (falling under Objective 5a measures) are included this percentage increases to 16.

2.2.5 Promotion

In 1993 a promotion fund disposing of 10 million ECU was set up, primarily aimed at supporting initiatives to improve the image of beef such as quality assurance schemes. Following the BSE crisis the European Parliament decided to increase the amount available for promotion in 1997 by 20 million ECU under a special reserve.

2.3 Budget Expenditure on Beef

Budget expenditure on beef for the first time exceeded the 4 billion ECU mark in the early nineties, when production reached a high, accounting for 14% of total EAGGF Guarantee expenditure (ie slightly more than the share of beef in the total value of agricultural production). Expenditure then declined until 1994 as production decreased (and thus expenditure on intervention), but has since been rising again as the full impact of higher premiums is felt. In 1996 additional expenditure, directly or indirectly related to the BSE crisis, arose and will continue in 1997, bringing the share of beef in total expenditure and in absolute terms to a historically high level, 18% and 7.5 bio ECU, respectively (see also annex 2). The BSE related additional expenditure is estimated at 1.4 bio Ecu in 1996 and 2 bio ECU in 1997.



Three Member States (France, Ireland and to a lesser extent Germany in the recent past) absorb about two thirds of EAGGF budget expenditure on beef. For Germany and France this is more or less in proportion to their share in total production, but for Ireland it far exceeds its share in production due to a high level of expenditure on intervention and/or refunds (see annex 2).

3. MARKET OUTLOOK FOR BEEF

3.1 Domestic supply and demand

Beef production in the EU peaked in 1991, reaching 8.7 million t (over 9 million t when reconstructing EU-15). The upward swing in the production cycle was reinforced by the German reunification process with a strong decapitalisation of herds in eastern Germany and a larger than normal influx of animals from eastern Europe.

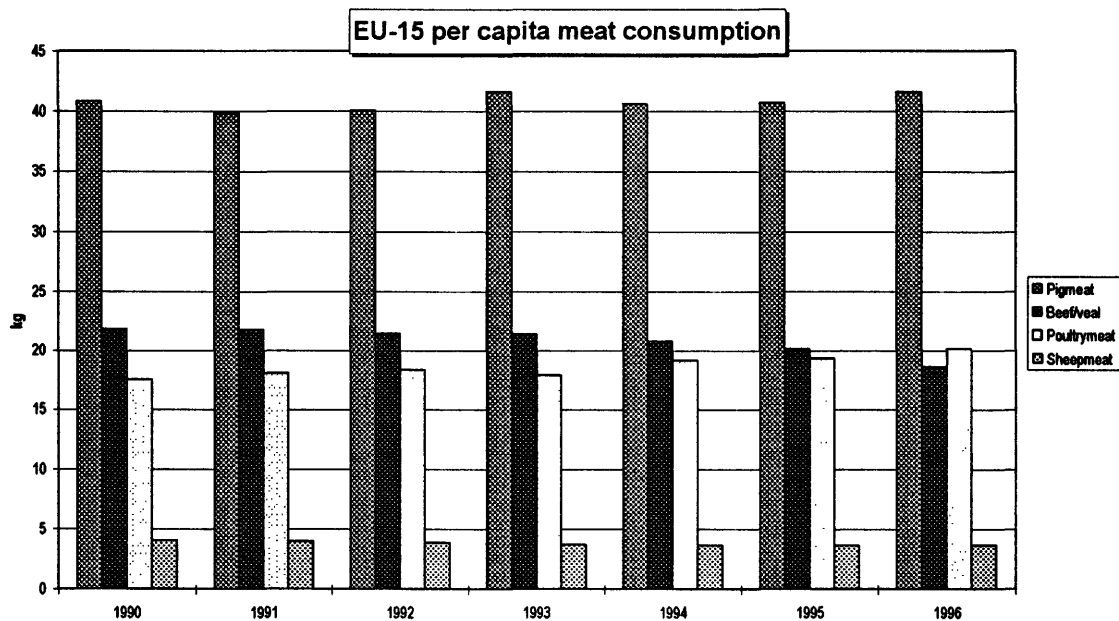
During the following three years, production declined rapidly by almost 15%, the cyclical downswing being reinforced by the 1992 reform. The latter allowed producers to use 1992 as reference year to establish premium rights, which led to the retention of animals, in particular cows and heifers, to build up references. Also the availability of the second male premium for bulls induced certain producers to hold on to these animals longer, temporarily accentuating the drop in production.

In Germany in particular, the decline in production since 1991 was more marked and prolonged than in the other major producers (ie France, UK and Italy). A destabilising factor might have been the first BSE fright in 1993, which already negatively affected consumption.

For the EU as a whole production turned round in 1995, increasing by 1.5%.

Beef consumption at the EU level tended to decline somewhat over the first half of the nineties as per capita consumption dropped from close to 22 kg to 20.1 kg in 1995. With production declining more rapidly, the large surpluses of the early nineties were sharply reduced.

The expected pattern of consumption as well as production for 1996 was perturbed by the outbreak of the BSE crisis in March. The sharpest drop in consumption was noted in the first few weeks following the announcement by the British government of the possible link between BSE and a new variant of the human brain disease Creutzfeldt-Jakob (CJD), with the UK and Germany being the worst affected. In the second half of the year beef purchases by consumers gradually started to recover and for the EU and the year as a whole, consumption dropped by a little over 7% from the 1995 level (or over 0.5 million t) with per capita consumption dropping to 18.6 kg. The loss in beef consumption was compensated by an increased consumption of poultry and pigmeat, accelerating the longer term tendency of poultry overtaking beef.

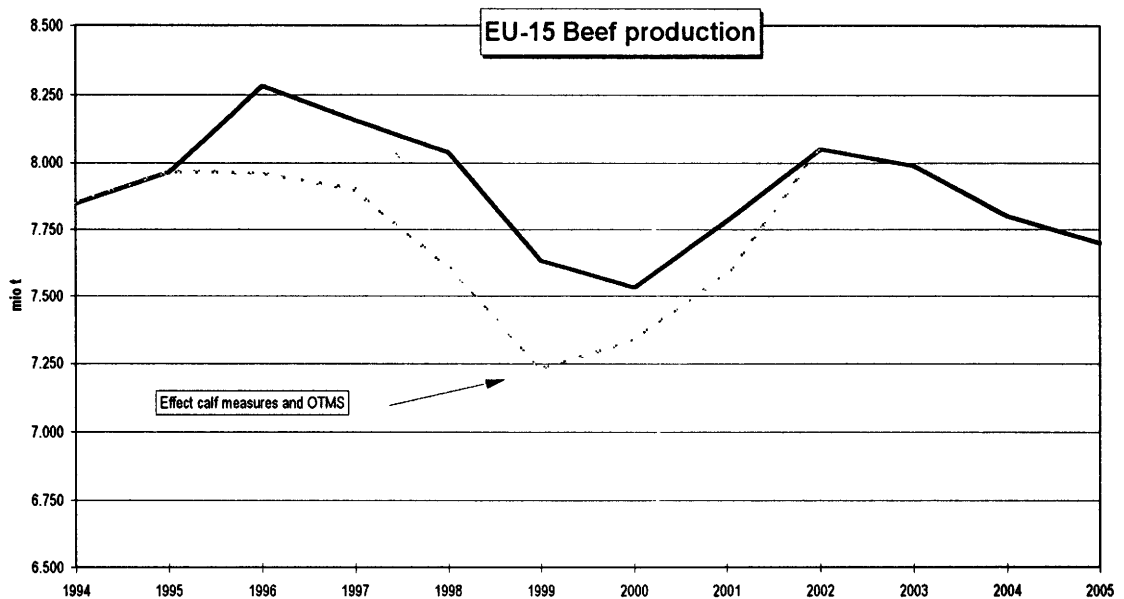


On the supply side, the decision to eliminate adult cattle of over 30 months in the UK from the food/feed chain led to a reduction in the expected production for 1996 of over 300,000 t. More than a million animals went into the scheme in 1996.

The drop in production was not sufficient to balance out the drop in consumption, resulting in intervention purchases exceeding the original 400,000 t limit for 1996.

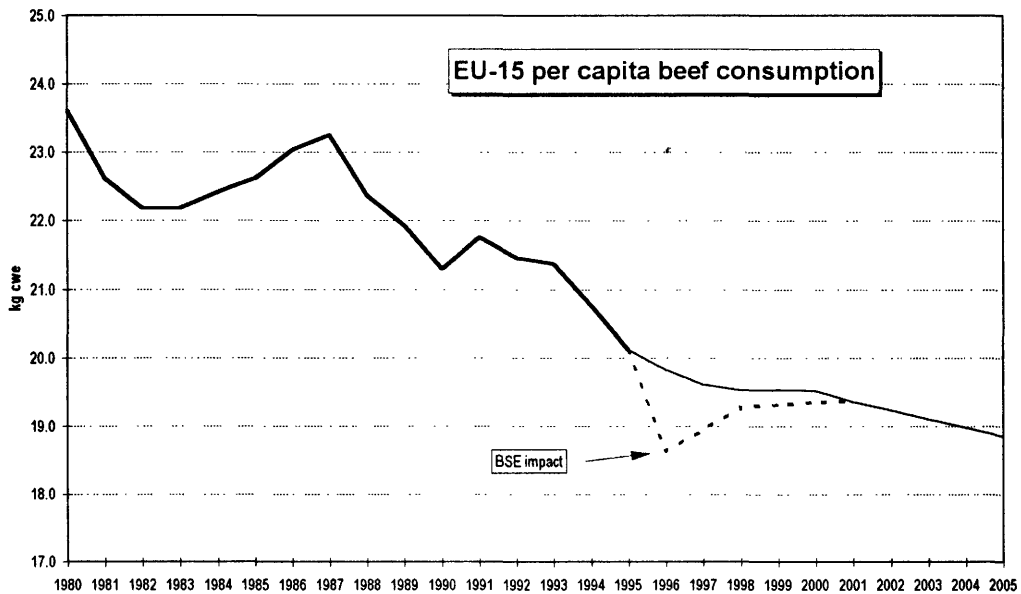
For the coming years balance in the beef market will depend on the impact on supply of the calf measures (calf processing and early marketing) and the over thirty months scheme (OTMS) and on the degree of recovery of consumption.

For the long term projections up to 2005 the assumption has been made that the calf measures, which started in the latter half of 1996 will be continued during 1997, while the OTMS in the UK will continue until 2001. The greatest impact of the calf measures will be felt in 1998 and 1999, reducing beef production by about 200,000 t in each of those years to which can be added about 200,000 t from the OTMS. The effect of the measures accentuates the already downward move in the beef production cycle after 1996.

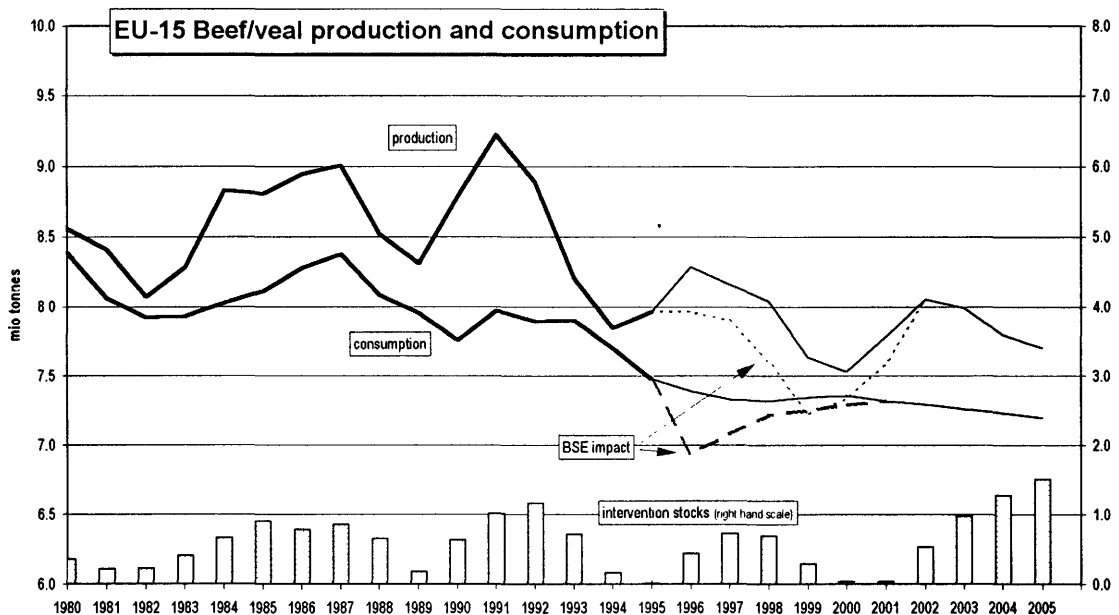


Historically per capita consumption of beef has been declining under the influence of the competition of cheaper poultry and pigmeat, consumer health concerns about red meat and certain image problems of beef (hormones, previous BSE scares). Without taking into account the longer term effects of the current BSE crisis, the projected rise in real incomes of around 2.5% annually till the end of the projection period would partially counterbalance the negative trend and slow down the decline in per capita beef consumption.

As far as the effects of the current BSE crisis are concerned the assumption is that the measures taken to prevent possible contamination of the food chain and to eradicate the disease, as well as to improve consumer information through labelling of meat and identification of animals, are helping to restore consumer confidence and that per capita beef consumption will return to its long term trend by 2001.



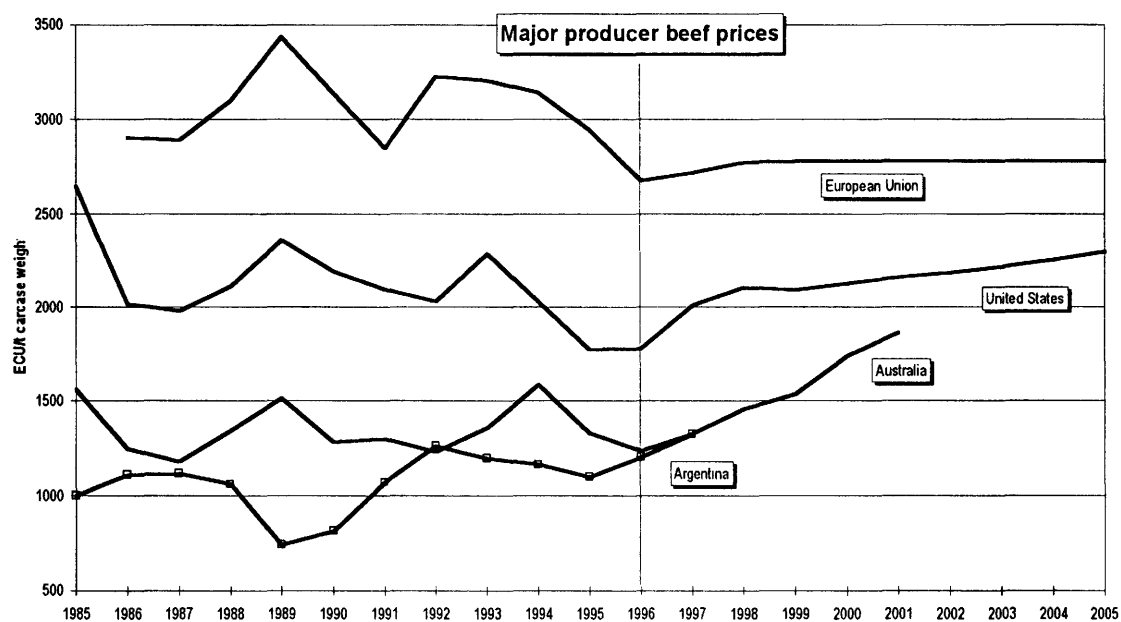
The reduced production and gradual recovery of consumption from the 1996 shock in the coming years would allow an important destocking from the levels built up during 1996 and 1997. After 2001 however, as production would return to its normal potential and consumption would continue its long term decline, stocks would tend to accumulate again (given the GATT limited export possibilities) and reach 1.5 million t by the end of the projection period.



3.2 International price and market developments

The projected price gap between the EU and other major exporters, although decreasing over the forecast period, would remain too big to allow unsubsidised EU exports¹⁵.

With an average support level of 80% of the intervention price, ie a price of around 2780 ECU/t, the EU price would still be nearly about 20 to 25% higher than the projected US price after 2000 (depending on the US\$-ECU exchange rate) and 30% or more higher than other major exporters. Only if the EU price were to drop to the safety net level, ie 60% of the intervention price or 2085 ECU/t, would the gap with the US price level be closed, but there would most likely still be a gap with other exporters.



US beef prices, which were under pressure in 1995 and 1996 due to record supplies, now seem to have bottomed out and are expected to continue to recover and move up over the projection period under the influence of a growing world import demand, in particular in Asia.

¹⁵ International price comparisons are difficult to make due to over or undervalued exchange rates, differences in qualities and representativity, liveweight or carcass weight price recording, etc. Nevertheless, they can give an impression of the order of magnitude of the differences in competitiveness.

Beef prices major producers										
<i>ECU/tonne cw</i>		1990	1991	1992	1993	1994	1995	1996	2000(p)	2005 (p)
EU	R3 (bulls/steers)	3140	2851	3226	3208	3145	2944	2679	2780	2780
US	choice steers (Nebraska)	2194	2098	2032	2290	2031	1775	1779	2125	2300
Australia	oxen	1282	1302	1229	1359	1590	1329	1238	1738	n.a
	cows/steers/yearlings	1323	1320	1114	1171	1370	1145	1067	1498	n.a
Argentina	steers	814	1071	1261	1196	1165	1100	1202	n.a	n.a
exchange rate	US\$/ECU	1.273	1.239	1.298	1.171	1.187	1.306	1.271	1.200	1.200

Sources: EU Meat Outlook Group, US USDA (baseline 97), Australia OECD (Outlook 1997-2001), Argentina GIRA (World Meat Market 1996/97)

Notes: US live weight to carcase weight conversion factor 0.63. Argentina 0.55; Australia: oxen price assumed to move in parallel with the cows/steers/yearlings weighted average price indicator used by the OECD for the projection period.

According to OECD projections total beef imports in Japan and other Asian countries could climb by 30% between 1996 and 2001 (for Japan alone from 1 to 1.2 million t), thereby surpassing NAFTA (US, Canada and Mexico) as the largest beef importing region in the world.

Main suppliers, apart from the US itself, would be Australia, New Zealand and some Latin American countries, achieving FMD¹⁶ free status, such as Uruguay and Argentina.

Less dynamic growth is expected for the EU's traditional markets in North Africa, the Middle East and central and eastern Europe, including the Former Soviet Union.

¹⁶ Countries (or even regions within countries according to the new WTO rules), where Foot and Mouth Disease is eradicated and which have a non-vaccination policy can export to other FMD free regions such as the Pacific market. Historically the "clean" Pacific market has fetched higher prices than the Atlantic market, to which the EU has had to limit itself (in the past partly for sanitary reasons and partly due to an agreement not export with subsidies to the Asian side of the Pacific market). Domestic beef prices in Japan are for instance more than twice the EU level. Over the medium term the price gap between the two markets could be expected to diminish as more FMD free exporters gain access to the Pacific market and EU exports as main supplier to the Atlantic market are increasingly constrained by the WTO Uruguay Round agreement.

4. ANNEX 1

4.1 Beef premiums

- suckler cow payments and herd developments
- male first and second payments
- extensification payments
- overview of beef premiums per Member State (including deseasonalisation payments, national suckler cow supplements and Less Favoured Area compensatory allowances)

EU suckler cow premiums																		
(000)	1993		1994		1995		(000)	unused 93	% used 93	unused 94	% used 94	potential rights			1996			
	premiums	herd	% covered	premiums	herd	% covered						premiums	herd	% covered	unused 95	% used 95	herdrights 93	herdrights 94
Belgium	435	479	91%	424	482	88%	444	8	98%	20	96%	64	86%	108%	108%	109%	518	117%
Denmark	102	117	87%	104	105	99%	136	34	75%	32	76%	29	79%	86%	77%	87%	122	90%
Germany	413	553	78%	506	623	81%	651	238	63%	145	78%	138	79%	85%	96%	105%	675	104%
Greece	126	87	145%	117	91	129%	150	24	84%	33	78%	24	84%	58%	61%	64%	96	64%
Spain	1243	1358	92%	1171	1470	80%	1463	219	85%	291	80%	223	85%	93%	100%	111%	1616	110%
France	3604	3951	91%	3519	4005	88%	3886	282	93%	367	91%	278	93%	102%	103%	106%	4164	107%
Ireland	884	928	95%	910	957	95%	1114	230	79%	204	82%	211	81%	83%	86%	89%	1063	95%
Italy	674	711	95%	543	743	73%	788	114	86%	245	69%	277	65%	90%	94%	92%	675	86%
Luxembourg	13	28	48%	13	29	45%	15	2	89%	2	90%	1	90%	188%	199%	201%	30	203%
Netherlands	50	95	53%	52	72	73%	98	48	51%	46	53%	45	55%	97%	73%	81%	86	88%
Portugal	226	258	88%	238	273	87%	287	61	79%	49	83%	35	88%	90%	95%	97%	286	100%
UK	1558	1760	89%	1552	1802	86%	1805	247	86%	253	86%	244	86%	97%	100%	100%	1791	99%
EU-12	9328	10324	90%	9150	10652	86%	10836	1508	86%	1686	84%	1569	86%	95%	98%	102%	11121	103%
Austria	69			264	210	125%	325					61	81%	21%	28%	65%	213	65%
Finland	34			25	30	84%	55					30	46%	61%	61%	54%	30	55%
Sweden	154			126	152	83%	155					29	81%	99%	99%	98%	150	97%
EU-15	10580			9682	11422	85%	11371					1689	85%	93%	96%	100%	11514	101%

Note: suckler premiums paid 1993-95, (source VI-D2, March 1997) and suckler (ie "other") cow numbers (source Eurostat, December survey)

EU male bovine premiums (first payment)																	
(000)	1993			1994			ceiling			1995 (provisional)			new ceiling		ceiling 1997-98		
	1st premium	production	% covered	1st premium	production	% covered	(000)	% used 93	% used 94	prod/ceiling 93	prod/ceiling 94	1st premium	production	% covered	(000)	% used 95	(000)
Belgium	224	321	70%	236	316	75%	331	68%	71%	97%	95%	250	327	76%	293	85%	235
Denmark	295	400	74%	283	356	80%	335	88%	84%	119%	106%	260	348	75%	325	80%	277
Germany	884	2328	38%	1784	2083	86%	3653	24%	49%	64%	57%	1787	2064	87%	3093	58%	1783
Greece	123	187	66%	132	184	72%	143	86%	92%	130%	128%	124	168	73%	140	88%	140
Spain	468	1024	46%	518	876	59%	562	83%	92%	182%	156%	552	980	56%	552	100%	604
France	1581	1483	107%	1735	1399	124%	2262	70%	77%	66%	62%	1857	1465	127%	1909	97%	1755
Ireland	544	828	66%	959	650	148%	1548	35%	62%	54%	42%	1030	691	149%	1287	80%	1002
Italy	541	2194	25%	533	2124	25%	835	65%	64%	263%	254%	524	2175	24%	825	64%	599
Luxembourg	17	9	187%	20	9	227%	22	78%	93%	42%	41%	19	10	196%	19	100%	19
Netherlands	224	434	52%	149	438	34%	264	85%	57%	164%	166%	117	390	30%	264	44%	158
Portugal	129	246	53%	155	212	73%	142	91%	109%	173%	149%	155	220	70%	155	100%	155
United Kingdom	1404	1488	94%	1380	1537	90%	1420	99%	97%	105%	108%	1382	1559	89%	1420	97%	1420
EU-12	6434	10941	59%	7884	10184	77%	11517	56%	68%	95%	88%	8056	10397	77%	10281	78%	8146
Austria												419	325	129%	423	99%	423
Finland												250	195	128%	250	100%	242
Sweden												214	240	89%	250	86%	226
EU-15												8940	11157	80%	11204	80%	9038

Note: male premiums paid 1993-95 (source VI-D2) and slaughtering in heads of bulls and steers (source Eurostat)

EU male bovine premiums (second payment)									
	1993			1994			1995 (provisional)		
	2nd premium	% all male pr.	% bulls	2nd premium	% all male pr.	% bulls	2nd premium	% all male pr.	% bulls
Belgium	48	18%	n.a	50	17%	97%	51	13%	96%
Denmark	8	3%	n.a	10	4%	82%	11	3%	79%
Germany	394	31%	94%	439	20%	96%	469	19%	94%
Greece	6	5%	n.a	9	6%	89%	30	15%	100%
Spain	35	7%	n.a	28	5%	97%	28	3%	93%
France	633	29%	n.a	481	22%	59%	541	27%	41%
Ireland	1138	68%	n.a	816	46%	0%	875	56%	1%
Italy	25	4%	n.a	20	4%	100%	22	1%	92%
Luxembourg	4	19%	n.a	5	19%	42%	5	36%	50%
Netherlands	9	4%	n.a	11	7%	94%	12	3%	100%
Portugal	17	11%	n.a	20	11%	100%	24	10%	100%
United Kingdom	683	33%	2%	745	35%	3%	772	33%	4%
EU-12	3000	32%		2634	25%	33%	2840	21%	31%
Austria							98	23%	83%
Finland							15	7%	100%
Sweden							99	29%	92%
EU-15							3051	21%	35%

Note: male premiums paid 1993-95 (source VI-D2)

EU extensification premium									
(000)	1993			1994			1995		
	total pr.	extens. pr	% total	total pr.	extens. pr	% total	total pr.	extens. pr	% total
Belgium	707	118	17%	710	131	18%	681	178	26%
Denmark	405	30	7%	398	60	15%	378	58	15%
Germany	1691	638	38%	2728	742	27%	2769	751	27%
Greece	255	181	71%	258	191	74%	279	212	76%
Spain	1746	1352	77%	1717	1372	80%	1819	1556	86%
France	5818	4401	76%	5736	4408	77%	6007	4606	77%
Ireland	2566	1838	72%	2686	2081	77%	2808	2003	71%
Italy	1239	333	27%	1096	307	28%	1057	328	31%
Luxembourg	34	28	82%	38	32	84%	38	32	84%
Netherlands	283	18	6%	212	10	5%	182	19	10%
Portugal	372	195	52%	412	211	51%	430	235	55%
United Kingdom	3646	2471	68%	3678	2659	72%	3715	2688	72%
EU-12	18762	11602	62%	19668	12203	62%	20163	12664	63%
Austria							781	353	45%
Finland							290	219	76%
Sweden							439	268	61%
EU-15							21673	13504	62%

Note: premiums paid 1993-95 (source VI-D2)

EU beef premiums															
(000)	1993				1994				1995						
	suckler	male	extensif	deseas. national	LFA	suckler	male	extensif	deseas. national	LFA	suckler	male	extensif	deseas. national	LFA
Belgium	435	272	118	435	108	424	286	131	424	106	380	301	178	380	104
Denmark	102	303	30	1		104	294	60	2		107	271	58	2	
Germany	413	1278	638	10	3056	506	2223	742	13	3045	513	2256	751	18	3036
Greece	126	129	181	126	195	117	141	191		195	126	154	212	126	195
Spain	1243	503	1352	1243	767	1171	545	1372		714	1240	580	1556	1240	658
France	3604	2214	4401	3604	3733	3519	2217	4408		3733	3608	2398	4606	3608	3733
Ireland	884	1682	1838	884	1546	910	1775	2081	195	1535	903	1905	2003	286	1524
Italy	674	566	333	674	408	543	553	307		284	511	546	328	511	284
Luxembourg	13	21	28	13	55	13	25	32		52	13	25	32	13	49
Netherlands	50	233	18		21	52	160	10		30	53	129	19		39
Portugal	226	146	195	226	332	238	174	211		277	252	179	235		273
United Kingdom	1558	2087	2471	91	1334	1552	2125	2659	87	1784	1561	2154	2688		1780
EU-12	9328	9434	11602	340	11555	9150	10518	12203	297	11756	9267	10896	12664	307	11676
Austria											264	518	353		
Finland											25	265	219		
Sweden											126	313	268		
EU-15											9682	11991	13504	307	
premium level (ECU)	84.4	72.4	36.2	72.4	65.0	114.7	90.6	36.2	72.5	67.0	144.9	108.7	36.2	72.5	67.0
B/Gr/Sp/Fr/Ir/Pl/UK				24.1					24.2					24.2	
premium value (mio ECU)	787	683	420	25	751	1050	953	442	22	788	1403	1303	489	22	782
tot. prem. value (mio ECU)			2843					3424							4173
beef prod. (000 t)			6933					6567							7172
av.(R3) carc. price (ECU/t)			3208					3145							2944
prod. value (mio ECU)			22241					20653							21117
premium/market revenue			11%					14%							16%

Source: VI-A1 calculation; the three columns in the last block compare total premium income of the sector to market revenues for 1993-4-5

5. ANNEX 2

5.1 Beef expenditure

- EU by category
- by Member State

EAGGF Guarantee expenditure on beef										
	refunds		interv.		premiums		promotion		total	% tot. Guar.
	mio ECU	% tot. exp.	mio ECU	% tot. exp.	mio ECU	% tot. exp.	mio ECU	% tot. exp.		
1986	1214	35%	2031	58%	237	7%			3482	16%
1987	1062	40%	1255	47%	354	13%			2671	10%
1988	843	33%	1273	49%	476	18%			2591	9%
1989	1343	55%	663	27%	422	17%			2429	10%
1990	1110	39%	998	35%	726	26%			2833	11%
1991	1282	30%	2303	54%	713	17%			4298	14%
1992	1333	30%	2191	49%	903	20%			4426	14%
1993	1711	43%	1383	35%	895	22%	9	0.2%	3998	12%
1994	1708	48%	-209	-6%	2033	57%	3	0.1%	3535	11%
1995	1761	43%	-215	-5%	2545	62%	4	0.1%	4095	12%
1996	1559	23%	861	13%	4386	64%	2	0.0%	6809	17%
1997	1601	21%	2069	28%	3781	51%	32	0.4%	7483	18%

Notes:

1986-96 expenditure, 1997 budget.

Intervention 1996 includes 51.8 mio ECU for the elimination of calves (FR, NL), 154.8 for cattle over 30 months (UK),

0.9 for specific slaughter (P), 24.4 for calf processing.

Premiums 1996 include 814.7 mio ECU of special income support for beef producers.

Intervention 1997 includes 319 mio ECU for the elimination of cattle over 30 months, 49 for calf processing, 393 for early marketing of veal calves

Premiums 1997 include 442 mio ECU of special income support for beef producers.

m/o ECU	1991			1992			1993			1994			1995									
	refunds	interv.	% EU	refunds	interv.	% EU	refunds	interv.	% EU	refunds	interv.	% EU	refunds	interv.	% EU							
Belgium	37.8	8.9	21.8	68.4	2%	78.4	4.5	12.9	95.8	2%	101.3	3%	79.4	-1.7	90.0	5%	77.5	-0.6	88.4	4%	165.3	
Denmark	28.8	91.0	17.3	137.1	3%	41.7	84.8	14.5	141.0	3%	134.5	3%	49.1	-32.6	39.7	5%	50.2	-5.7	41.1	2%	85.6	
Germany	522.4	527.4	67.9	1117.7	26%	437.8	478.9	166.8	1083.5	24%	901.1	23%	370.6	-7.4	153.6	0.8	372.6	-3.9	297.6	16%	667.3	
Greece	0.0	-8.6	10.8	2.2	0%	0.0	0.0	13.1	13.2	0%	9.8	0%	2.1	28.5	28.5	30.6	0.9	-4.8	33.5	1%	29.6	
Spain	15.4	5.6	64.1	85.2	2%	29.8	25.8	78.1	133.7	3%	95.6	2%	12.5	-16.8	236.9	1.1	24.4	-19.7	250.0	0.1	254.8	
France	267.7	389.1	210.5	867.3	20%	240.1	548.0	257.3	1045.4	24%	844.2	21%	307.6	-42.9	618.4	1.0	256.6	-13.6	776.1	0.4	1019.5	
Ireland	146.5	624.0	89.8	860.4	20%	160.5	576.0	119.7	856.2	19%	981.5	25%	552.3	8.5	286.8	847.6	597.3	-60.9	382.9	24%	919.3	
Italy	120.4	319.3	80.2	519.8	12%	126.7	230.5	54.4	411.5	9%	324.4	8%	65.0	-29.7	106.4	141.7	36.7	-13.6	121.1	1.1	145.3	
Luxembourg	0.0	0.0	1.0	1.0	0%	0.0	0.0	0.8	0.9	0%	2.3	0%	0.1	3.7	3.7	3.8	0.0	0.0	5.0	0%	5.0	
Netherlands	123.6	3.5	13.0	140.0	3%	175.5	1.9	17.8	195.2	4%	18.6	0%	189.6	-0.8	20.9	209.6	207.7	-1.5	22.2	0.1	228.5	
Portugal	0.0	-5.4	0.0	-5.4	0%	0.0	-6.3	13.4	7.0	0%	18.6	0%	0.1	-3.3	59.2	56.9	0.1	-7.6	74.5	0%	67.0	
United Kingdom	19.9	348.1	136.7	504.7	12%	42.1	246.5	153.7	442.3	10%	371.5	9%	80.1	-82.2	388.5	386.5	130.3	-83.5	453.0	0.9	500.7	
EU-12	1282.4	2302.8	713.1	4298.3	100%	1332.5	2190.6	902.6	4425.7	100%	3998.2	100%	1708.4	-209.0	2032.5	3.1	3535.1	1754.3	-215.4	2545.4	3.6	4087.9
Austria																		4.5				4.5
Finland																		1.7				1.7
Sweden																		0.6				0.6
EU-15																		1761.1	-215.4	2545.4	3.6	4084.7

Source: FEODA financial reports
premiums include mixed herds (B3804)

6. ANNEX 3

6.1 Cow herd

- dairy versus suckler
- share of Member States in the dairy and suckler cow herds

6.2 Net beef/veal production by Member State and category (bull, steer, heifer, cow and veal)

EU cow herd															
(000)	1992			1993			1994			1995			1996		
	total	dairy	other	total	dairy	other	total	dairy	other	total	dairy	other	total	dairy	other
Belgium	1188	741	447	1182	703	479	1201	720	482	1190	684	507	1163	645	518
Denmark	827	708	119	828	711	117	822	717	105	832	714	118	819	697	122
Germany	5872	5365	507	5854	5301	553	5897	5273	623	5916	5229	687	5860	5185	675
Greece	307	205	102	306	219	87	266	175	91	281	185	96	281	185	96
Spain	2769	1447	1323	2728	1370	1358	2813	1343	1470	2815	1281	1534	2909	1293	1616
France	8574	4642	3932	8566	4615	3951	8761	4756	4005	8781	4672	4109	8726	4562	4164
Ireland	2173	1262	912	2202	1274	928	2226	1269	957	2256	1267	989	2335	1272	1063
Italy	3028	2317	711	2998	2287	711	2910	2167	743	2783	2113	670	2800	2125	675
Luxembourg	77	51	26	79	51	28	78	49	29	77	48	30	78	48	30
Netherlands	1915	1821	94	1872	1777	95	1829	1757	72	1853	1777	76	1728	1642	86
Portugal	622	381	241	633	375	258	641	368	273	645	364	281	648	362	286
United Kingdom	4482	2747	1735	4546	2786	1760	4569	2767	1802	4446	2631	1815	4300	2509	1791
EU-12	31835	21686	10149	31793	21469	10324	32013	21361	10652	31876	20965	10911	31646	20525	11121
Austria	902	842	60	897	828	69	900	810	90	917	707	211	910	698	213
Finland	455	426	29	452	419	34	446	413	34	432	402	30	426	396	30
Sweden				657	503	154	657	503	154	633	481	152	628	478	150
EU-15				33799	23219	10581	34016	23086	10930	33858	22555	11303	33610	22096	11514
difference t-1	1992			1993			1994			1995			1996		
	total	dairy	other	total	dairy	other	total	dairy	other	total	dairy	other	total	dairy	other
Belgium				-6	-38	32	20	17	3	-11	-36	25	-28	-39	11
Denmark				1	3	-2	-6	6	-12	10	-3	13	-13	-17	4
Germany				-19	-64	46	43	-28	70	20	-44	64	-56	-44	-12
Greece				-1	14	-15	-40	-44	4	15	10	5	0	0	0
Spain				-41	-77	35	85	-27	112	2	-62	64	94	12	82
France				-8	-27	19	195	141	54	20	-84	104	-55	-110	55
Ireland				29	13	17	23	-5	28	30	-2	32	79	5	74
Italy				-30	-30	0	-88	-120	32	-127	-54	-73	17	12	5
Luxembourg				2	0	2	0	-2	2	-1	-1	0	0	0	0
Netherlands				-43	-44	1	-43	-20	-23	24	20	4	-125	-135	10
Portugal				11	-6	17	8	-7	15	4	-4	8	3	-2	5
United Kingdom				64	39	25	23	-19	42	-123	-136	13	-146	-122	-24
EU-12				-42	-217	175	219	-108	328	-137	-396	259	-230	-440	210
Austria				-5	-14	9	3	-18	21	17	-104	121	-7	-9	2
Finland				-3	-8	5	-6	-6	0	-14	-10	-4	-6	-7	0
Sweden							0	0	0	-24	-22	-2	-5	-3	-2
EU-15							217	-132	349	-158	-532	374	-248	-459	210
% change t-1	1992			1993			1994			1995			1996		
	total	dairy	other	total	dairy	other	total	dairy	other	total	dairy	other	total	dairy	other
Belgium				-0.5%	-5.1%	7.1%	1.7%	2.4%	0.7%	-0.9%	-5.0%	5.2%	-2.3%	-5.7%	2.2%
Denmark				0.1%	0.4%	-1.7%	-0.7%	0.8%	-10.3%	1.2%	-0.4%	12.4%	-1.6%	-2.4%	3.4%
Germany				-0.3%	-1.2%	9.0%	0.7%	-0.5%	12.7%	0.3%	-0.8%	10.2%	-0.9%	-0.8%	-1.8%
Greece				-0.3%	6.8%	-14.7%	-13.2%	-20.2%	4.6%	5.8%	5.9%	5.5%	0.0%	0.0%	0.0%
Spain				-1.5%	-5.3%	2.7%	3.1%	-2.0%	8.2%	0.1%	-4.6%	4.4%	3.3%	0.9%	5.3%
France				-0.1%	-0.6%	0.5%	2.3%	3.1%	1.4%	0.2%	-1.8%	2.6%	-0.6%	-2.4%	1.3%
Ireland				1.3%	1.0%	1.8%	1.1%	-0.4%	3.1%	1.3%	-0.2%	3.3%	3.5%	0.4%	7.5%
Italy				-1.0%	-1.3%	-0.1%	-2.9%	-5.2%	4.5%	-4.4%	-2.5%	-9.8%	0.6%	0.6%	0.7%
Luxembourg				2.2%	0.4%	5.7%	-0.3%	-3.7%	6.1%	-1.3%	-2.7%	1.0%	0.4%	0.2%	0.7%
Netherlands				-2.2%	-2.4%	1.1%	-2.3%	-1.1%	-24.2%	1.3%	1.1%	5.6%	-6.7%	-7.6%	13.2%
Portugal				1.8%	-1.6%	7.1%	1.3%	-1.9%	5.8%	0.6%	-1.1%	2.9%	0.5%	-0.5%	1.8%
United Kingdom				1.4%	1.4%	1.4%	0.5%	-0.7%	2.4%	-2.7%	-4.9%	0.7%	-3.3%	-4.6%	-1.3%
EU-12				-0.1%	-1.0%	1.7%	0.7%	-0.5%	3.2%	-0.4%	-1.9%	2.4%	-0.7%	-2.1%	1.9%
Austria				-0.5%	-1.7%	15.5%	0.3%	-2.2%	29.9%	1.9%	-12.8%	133.9%	-0.7%	-1.3%	1.0%
Finland				-0.7%	-1.9%	15.5%	-1.3%	-1.4%	0.3%	-3.1%	-2.5%	-11.0%	-1.5%	-1.7%	1.3%
Sweden							0.1%	0.0%	0.3%	-3.7%	-4.4%	-1.3%	-0.8%	-0.6%	-1.3%
EU-15							0.6%	-0.6%	3.3%	-0.5%	-2.3%	3.4%	-0.7%	-2.0%	1.9%

Source Eurostat

EU beef/veal (net) production by MS and category 1995												
	bull		steer		heifer		cow		total adult		calves	
	000 head	EU share %	000 head	EU share %	000 head	EU share %	000 head	EU share %	000 head	EU share %	000 head	EU share %
Belgium	316	4%	11	1%	67	2%	317	4%	711	3%	336	6%
Denmark	343	4%	5	0%	57	1%	298	4%	703	3%	55	1%
Germany	2025	23%	39	2%	674	16%	1513	20%	4251	19%	501	9%
Greece	168	2%	0	0%	31	1%	36	0%	235	1%	80	1%
Spain	980	11%	0	0%	591	14%	393	5%	1965	9%	25	0%
France	1136	13%	329	15%	577	14%	1926	26%	3968	17%	2042	35%
Ireland	27	0%	664	30%	487	11%	335	4%	1514	7%	0	0%
Italy	2165	24%	9	0%	558	13%	678	9%	3411	15%	1321	23%
Luxembourg	7	0%	3	0%	5	0%	6	0%	21	0%	2	0%
Netherlands	390	4%	0	0%	48	1%	743	10%	1181	5%	1198	21%
Portugal	214	2%	6	0%	53	1%	52	1%	325	1%	71	1%
United Kingdom	392	4%	1167	52%	940	22%	767	10%	3266	14%	26	0%
EU-12	8164	92%	2233	99%	4089	96%	7063	94%	21550	94%	5658	97%
Austria	312	4%	12	1%	69	2%	139	2%	533	2%	130	2%
Finland	195	2%	0	0%	52	1%	136	2%	383	2%	10	0%
Sweden	240	3%	0	0%	52	1%	209	3%	501	2%	30	1%
EU-15	8911	100%	2246	100%	4262	100%	7547	100%	22965	100%	5828	100%
EU-15 share %		39%		10%		19%		33%		100%		

	bull		steer		heifer		cow		total beef		veal		total	
	000 t	EU share %	000 t	EU share %	000 t	EU share %	000 t	EU share %	000 t	EU share %	000 t	EU share %	000 t	EU share %
Belgium	136	5%	5	1%	27	2%	128	6%	296	4%	54	7%	349	4%
Denmark	85	3%	2	0%	14	1%	79	4%	180	3%	6	1%	185	2%
Germany	717	24%	13	2%	179	15%	439	20%	1347	19%	60	8%	1408	18%
Greece	44	1%	0	0%	7	1%	8	0%	59	1%	12	2%	71	1%
Spain	257	9%	0	0%	141	12%	107	5%	505	7%	4	0%	509	6%
France	454	15%	134	17%	201	17%	635	28%	1425	20%	259	32%	1683	21%
Ireland	11	0%	243	31%	133	11%	93	4%	480	7%	0	0%	480	6%
Italy	683	23%	3	0%	141	12%	173	8%	999	14%	182	23%	1181	15%
Luxembourg	3	0%	1	0%	2	0%	2	0%	7	0%	0	0%	7	0%
Netherlands	149	5%	0	0%	13	1%	225	10%	386	5%	194	24%	580	7%
Portugal	65	2%	2	0%	14	1%	13	1%	95	1%	9	1%	104	1%
United Kingdom	120	4%	384	49%	254	22%	215	10%	973	14%	1	0%	974	12%
EU-12	2725	92%	786	99%	1125	96%	2116	94%	6751	94%	780	98%	7531	95%
Austria	116	4%	4	1%	20	2%	43	2%	183	3%	13	2%	196	2%
Finland	53	2%	0	0%	11	1%	31	1%	95	1%	1	0%	96	1%
Sweden	72	2%	0	0%	12	1%	56	3%	140	2%	3	0%	143	2%
EU-15	2965	100%	790	100%	1168	100%	2246	100%	7169	100%	797	100%	7966	100%
EU-15 share %		37%		10%		15%		28%		90%		10%		100%

	average slaughter weight in kg					
	bull	steer	heifer	cow	adult	calf
Belgium	432	404	402	403	416	160
Denmark	248	300	247	265	256	101
Germany	354	326	265	290	317	121
Greece	262		233	223	252	149
Spain	262		239	272	257	145
France	400	408	348	330	359	127
Ireland	394	366	273	276	317	
Italy	315	297	252	255	293	137
Luxembourg	391	343	297	327	343	142
Netherlands	381		267	302	327	162
Portugal	305	362	256	260	291	129
United Kingdom	307	329	270	280	298	38
EU-12	334	352	275	300	313	138
Austria	372	352	293	306	344	97
Finland	271		207	229	247	96
Sweden	298		233	269	280	106
EU-15	333	352	274	298	312	137

Source: Eurostat

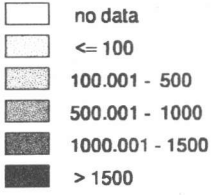
7. ANNEX 4

7.1 Maps

Regional distribution of cattle (and suckler cows), per holding, stocking densities and nitrogen production by cattle per region.

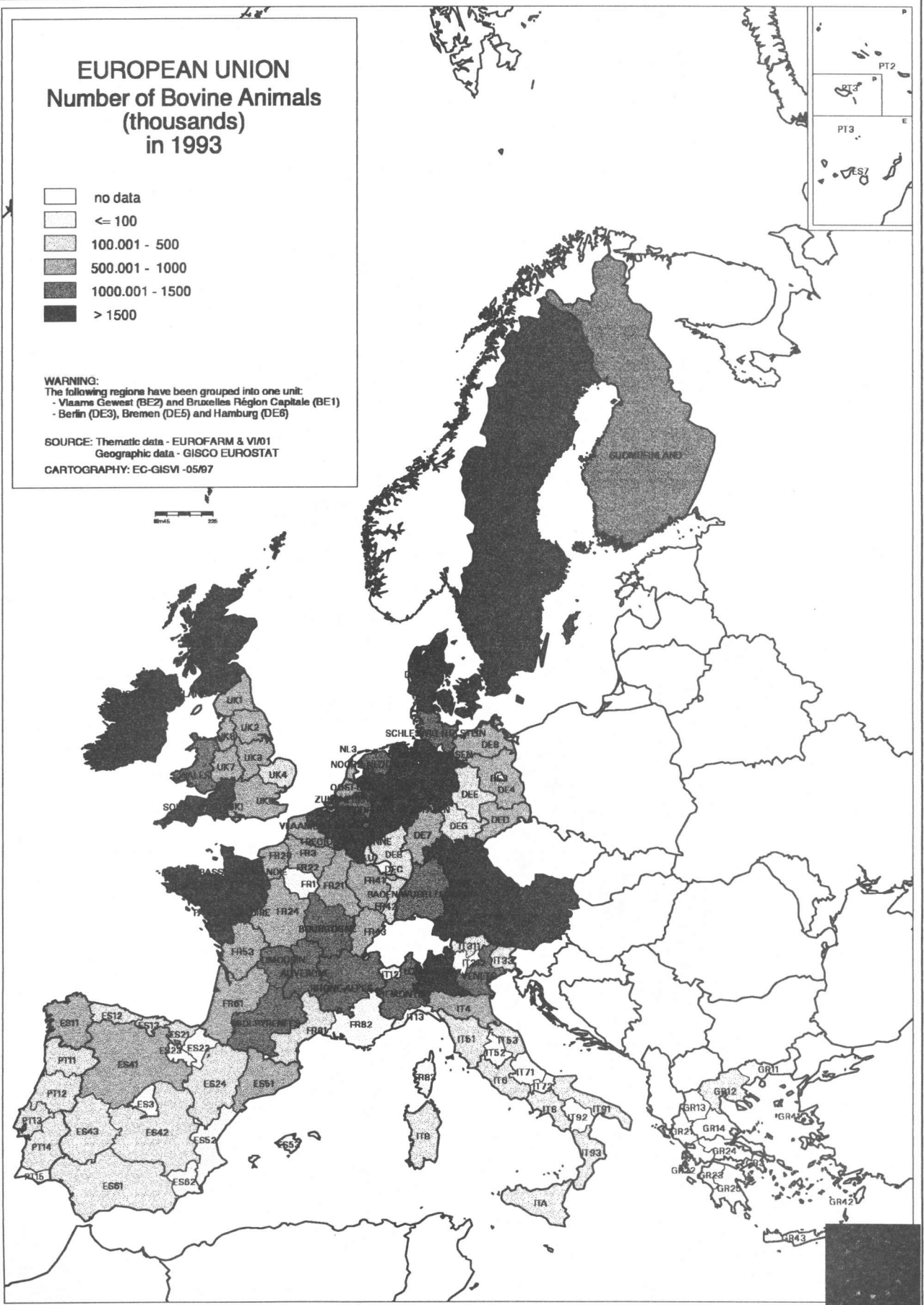
EUROPEAN UNION

Number of Bovine Animals (thousands) in 1993



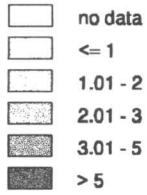
WARNING:
The following regions have been grouped into one unit:
- Vlaams Gewest (BE2) and Bruxelles Région Capitale (BE1)
- Berlin (DE3), Bremen (DE5) and Hamburg (DE6)

SOURCE: Thematic data - EUROFARM & VI/01
Geographic data - GISCO EUROSTAT
CARTOGRAPHY: EC-GISVI -05/97



EUROPEAN UNION

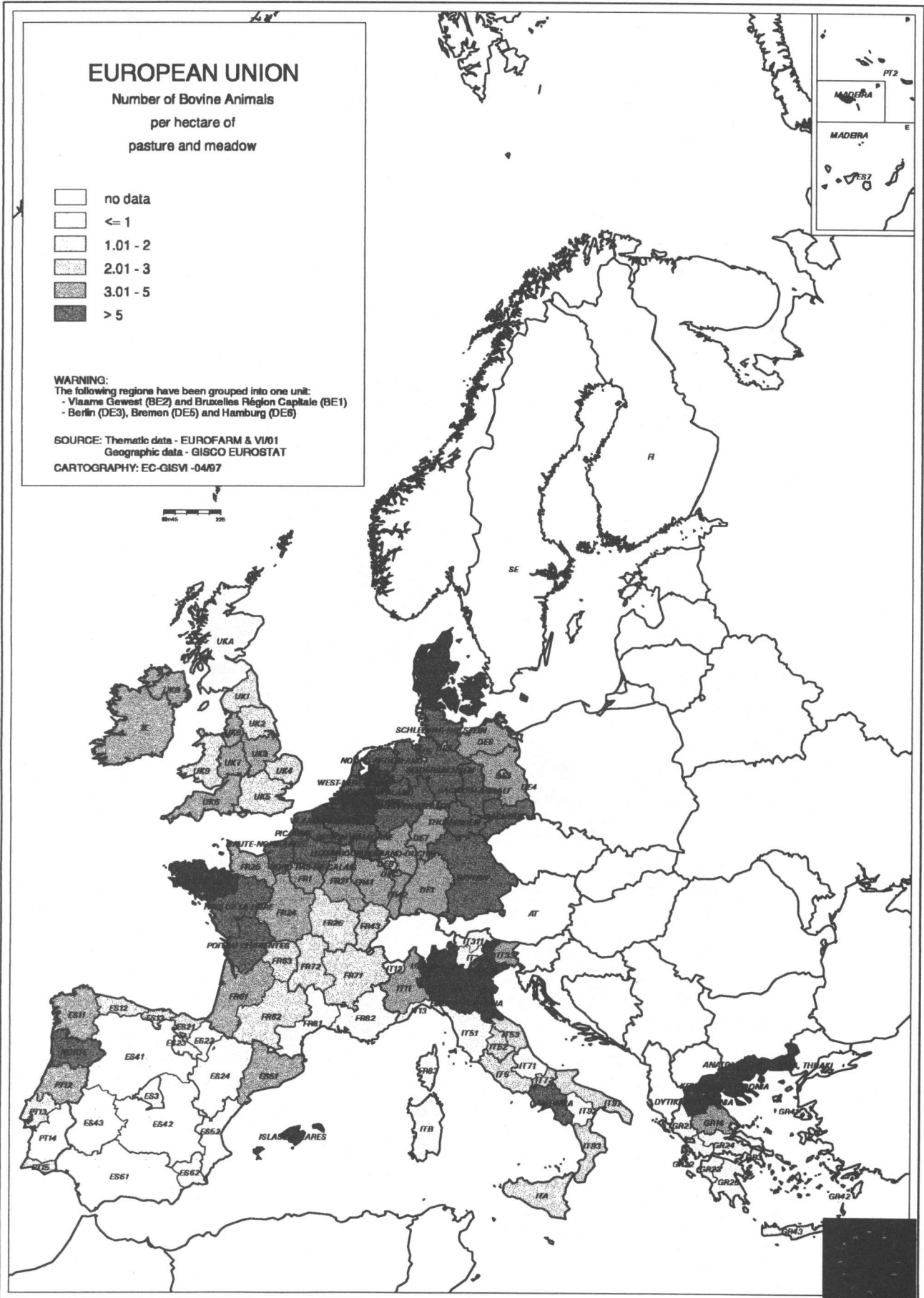
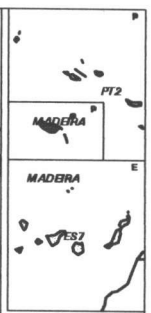
Number of Bovine Animals
per hectare of
pasture and meadow



WARNING:
The following regions have been grouped into one unit:
- Vlaams Gewest (BE2) and Bruxelles Région Capitale (BE1)
- Berlin (DE3), Bremen (DE5) and Hamburg (DE6)

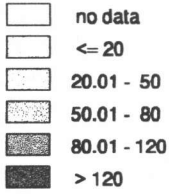
SOURCE: Thematic data - EUROFARM & VI/01
Geographic data - GISCO EUROSTAT

CARTOGRAPHY: EC-GISVI -04/87



EUROPEAN UNION

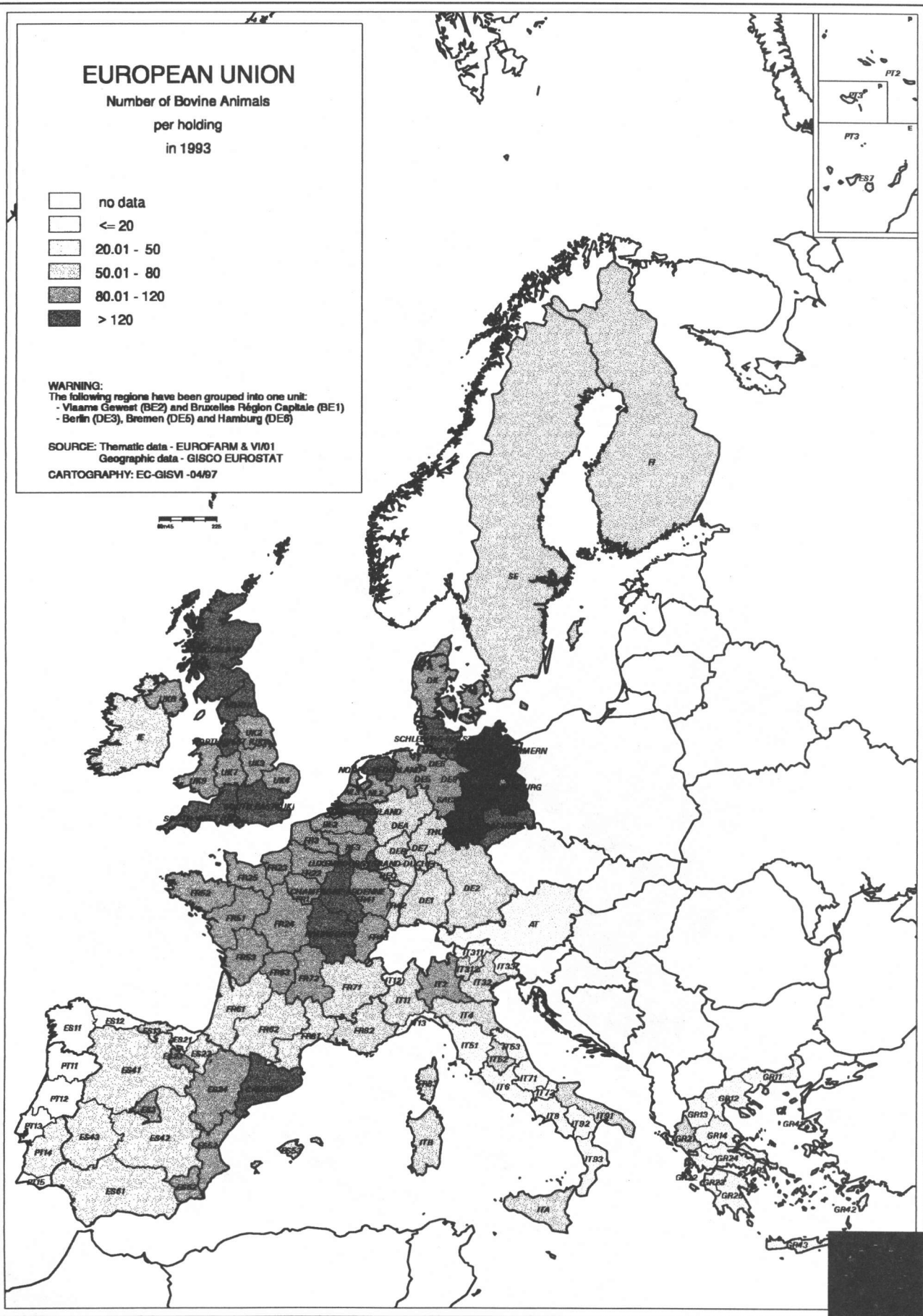
Number of Bovine Animals
per holding
in 1993



WARNING:
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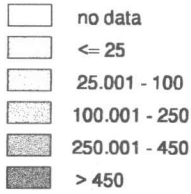
SOURCE: Thematic data - EUROFARM & VI/01
Geographic data - GISCO EUROSTAT

CARTOGRAPHY: EC-GISVI -04/87



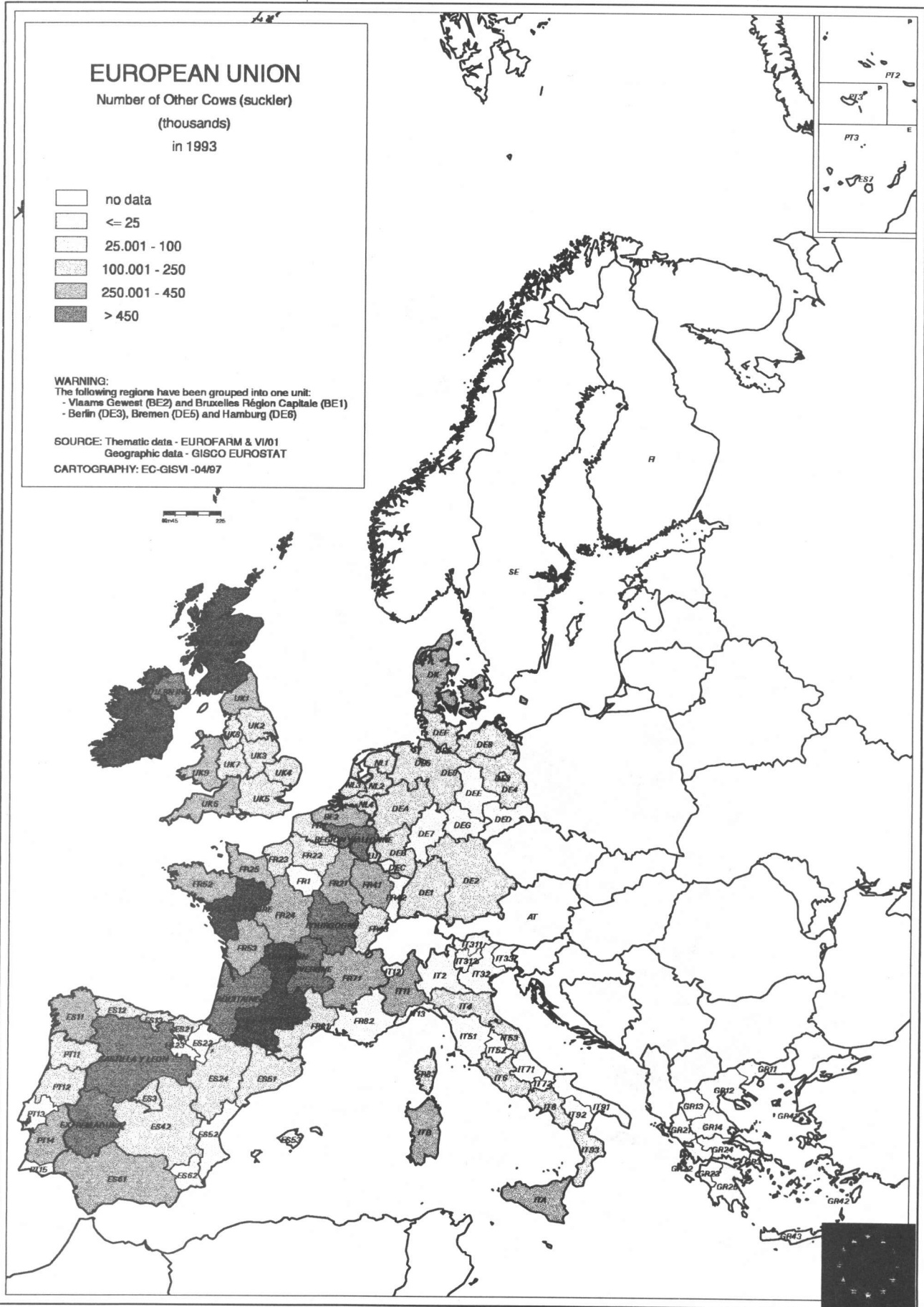
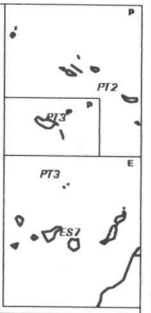
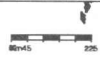
EUROPEAN UNION

Number of Other Cows (suckler)
(thousands)
in 1993



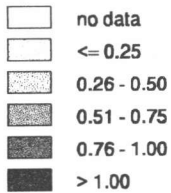
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SOURCE: Thematic data - EUROFARM & VI/01
Geographic data - GISCO EUROSTAT
CARTOGRAPHY: EC-GISVI -04/97



EUROPEAN UNION

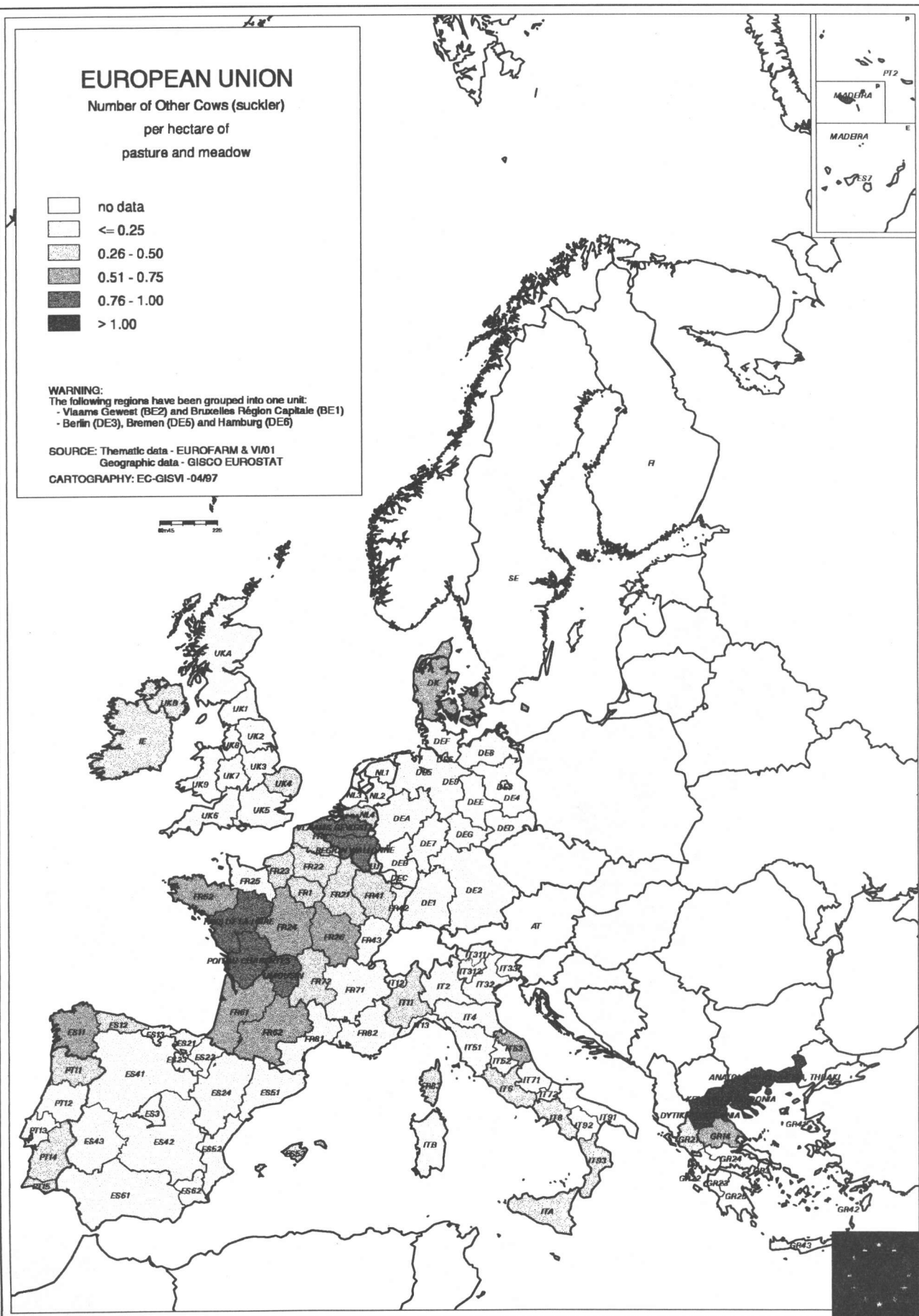
Number of Other Cows (suckler)
per hectare of
pasture and meadow



WARNING:

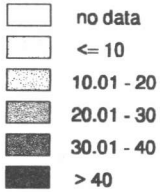
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Geographic data - GISCO EUROSTAT
CARTOGRAPHY: EC-GISVI -04/87



EUROPEAN UNION

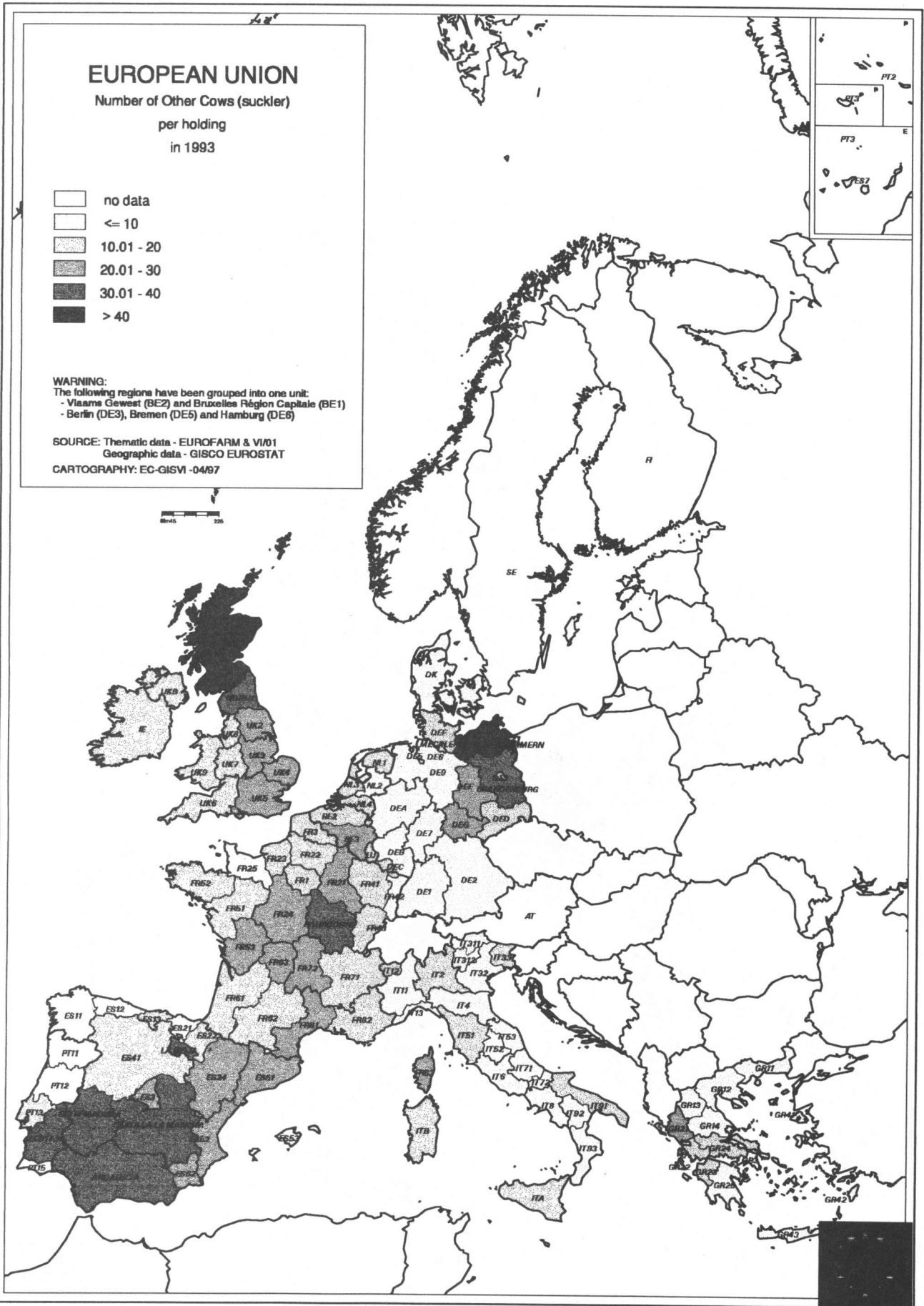
Number of Other Cows (suckler)
per holding
in 1993



WARNING:

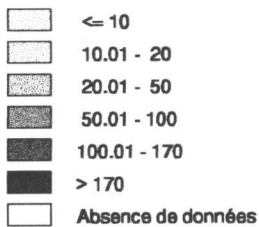
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EUROPEAN UNION

Nitrogen Production
by Bovine Animals (1993)
expressed as kg N / ha of UAA



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