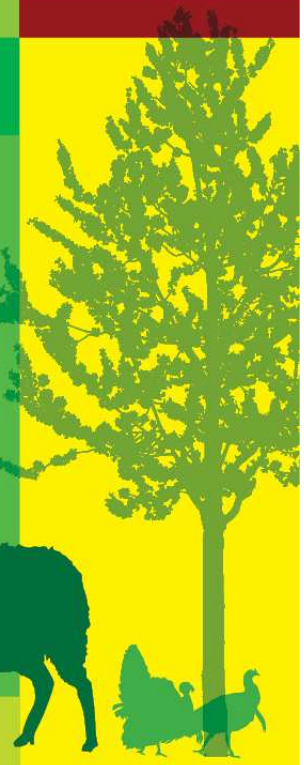
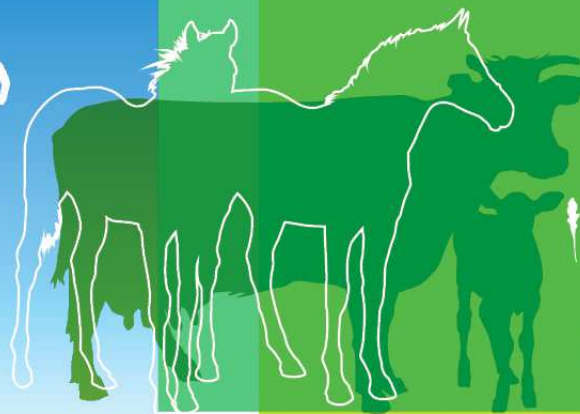


# Comité Bovins viande

## Situation des marchés

21 octobre 2014

Montreuil

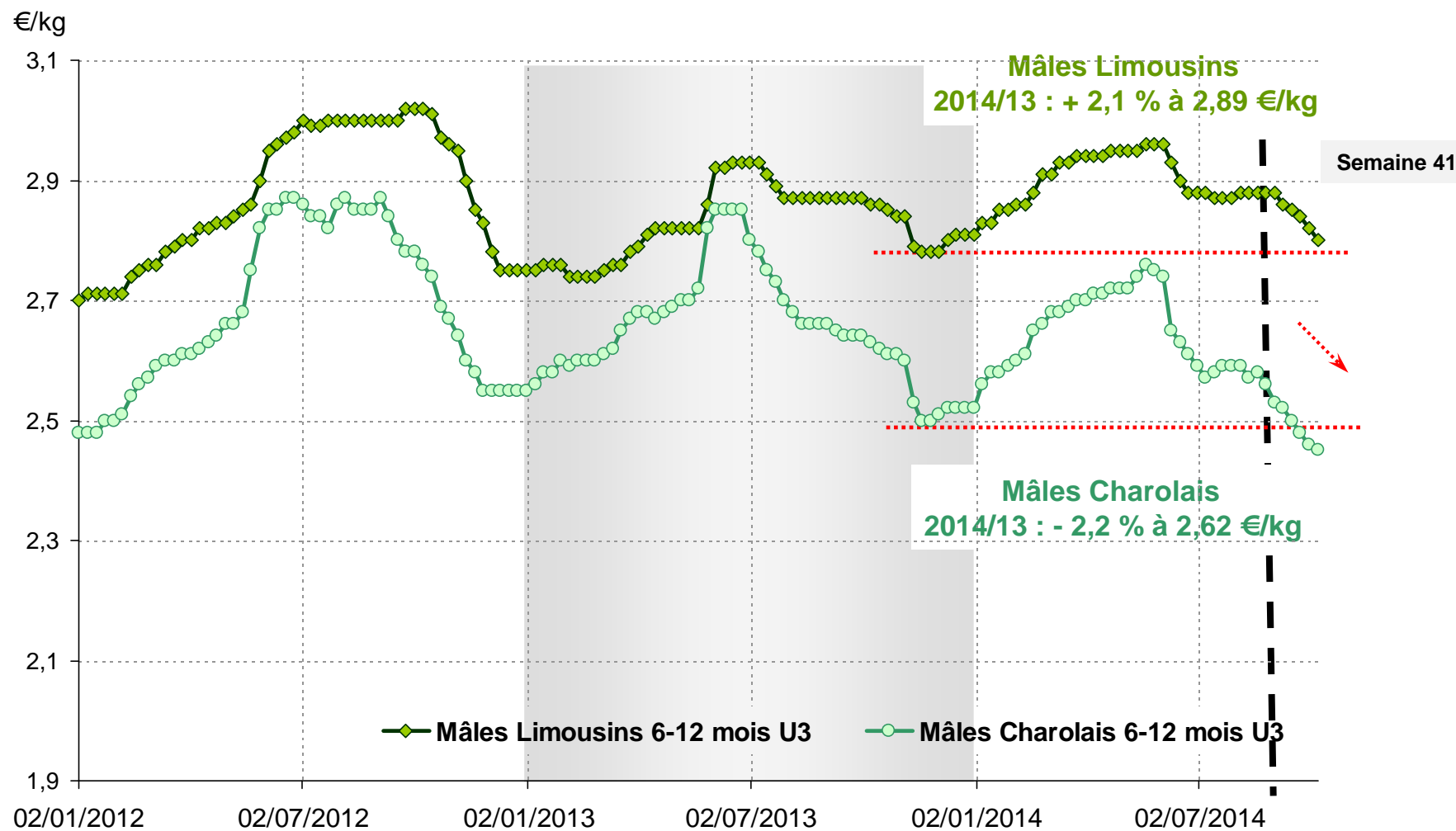




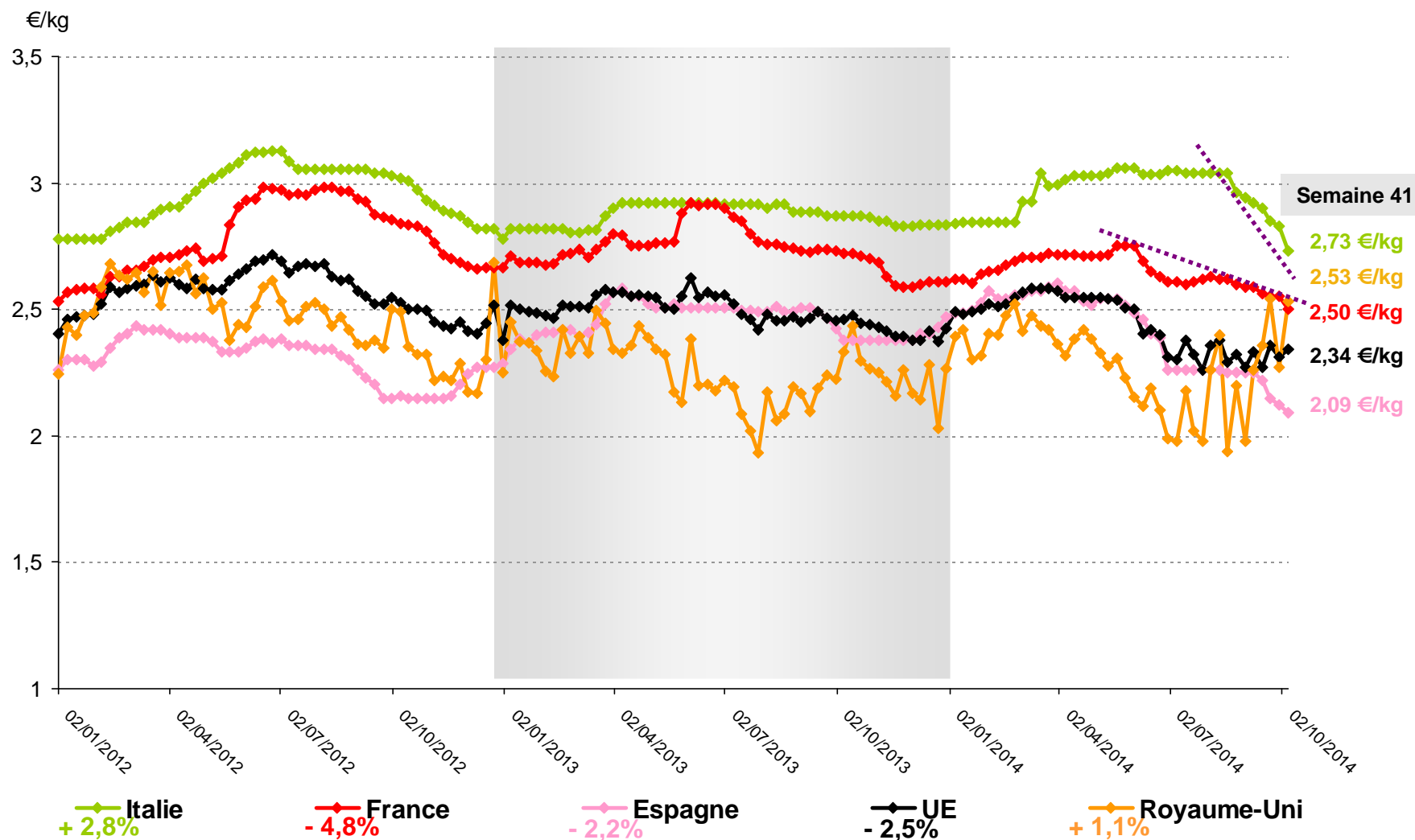
# Marché du broutard



## Tendance contrastée des prix des broutards...



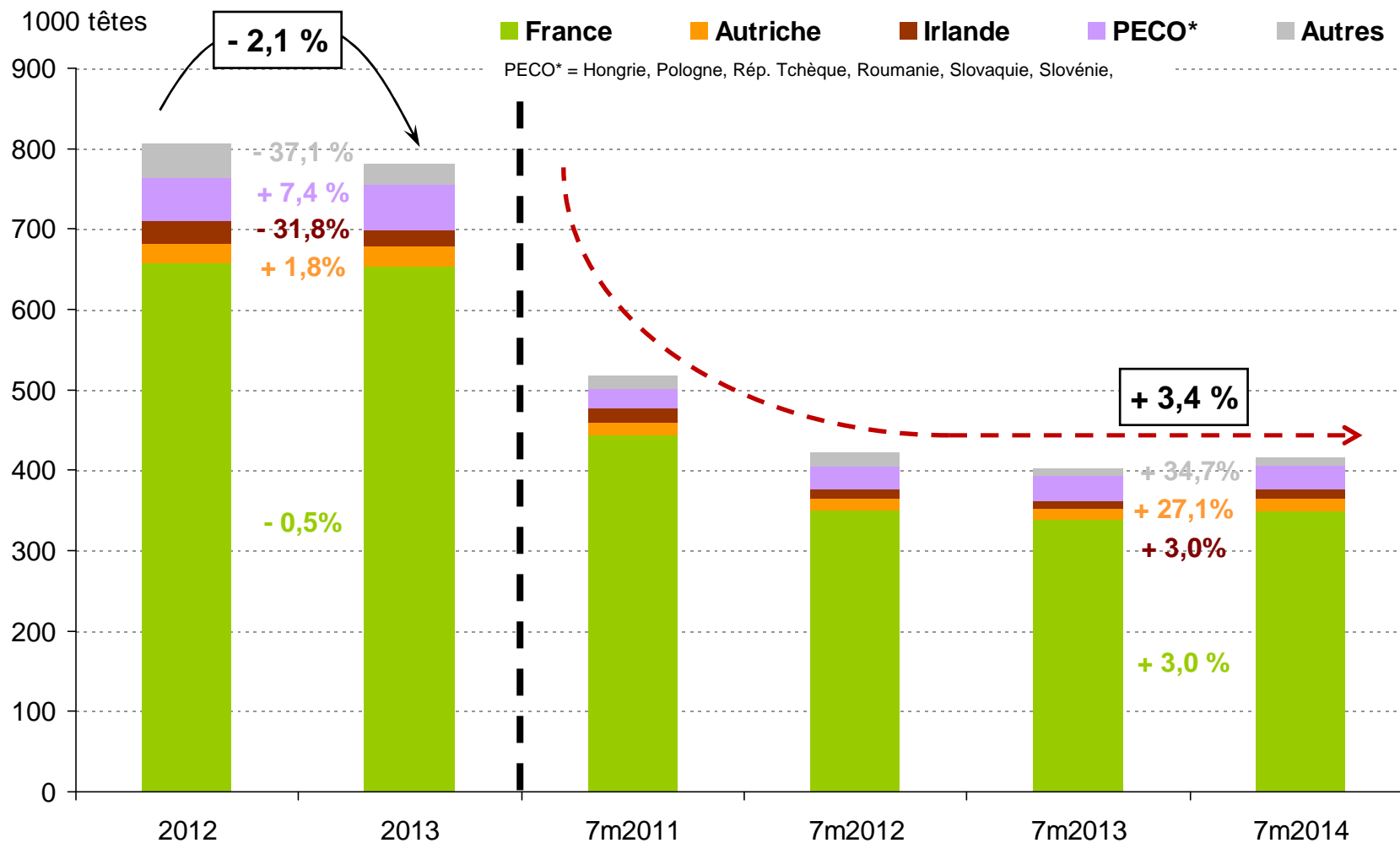
## Tendance à la baisse plus affirmée sur le marché européen...



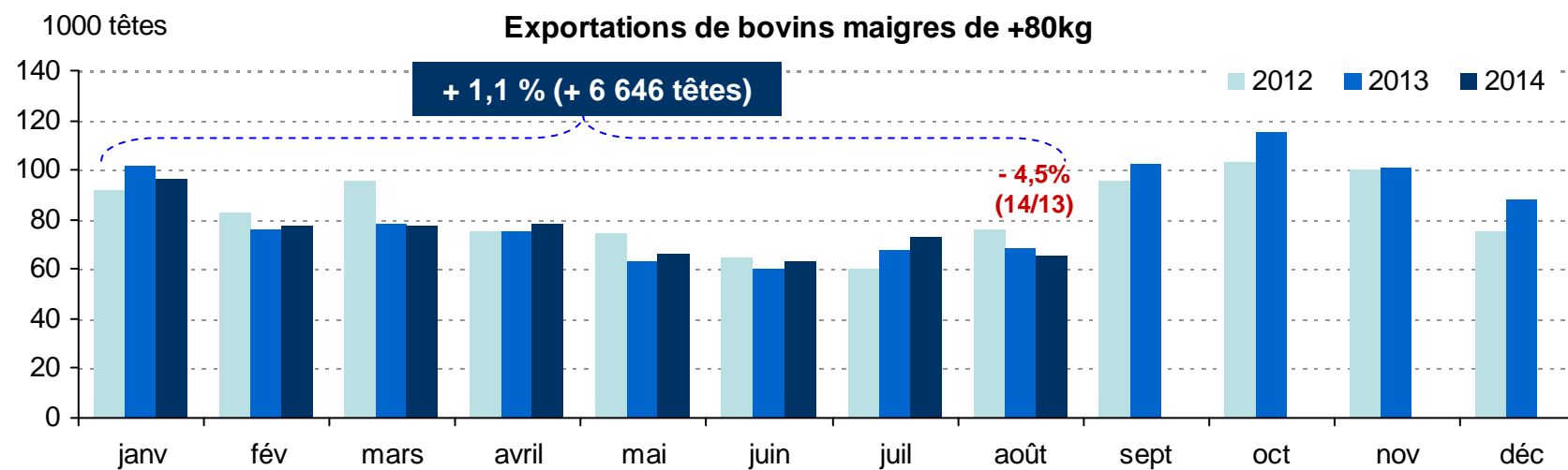
ÉTABLISSEMENT NATIONAL DES PRODUITS DE L'AGRICULTURE ET DE LA MER

Source : FranceAgriMer, d'après Commission européenne

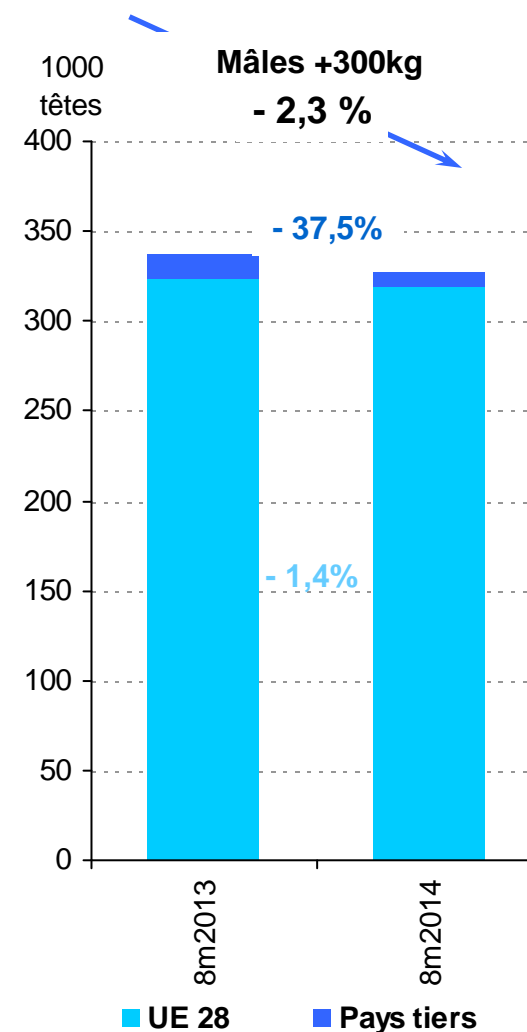
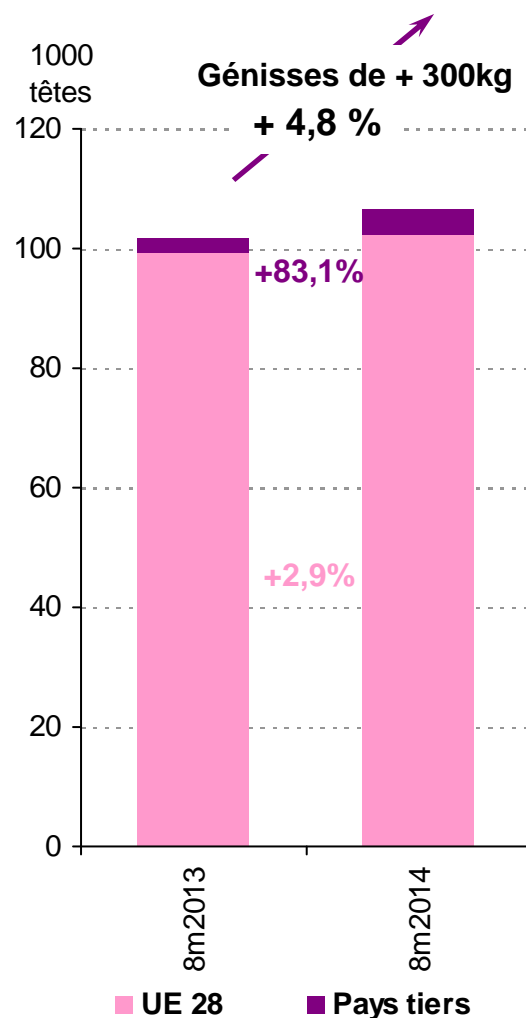
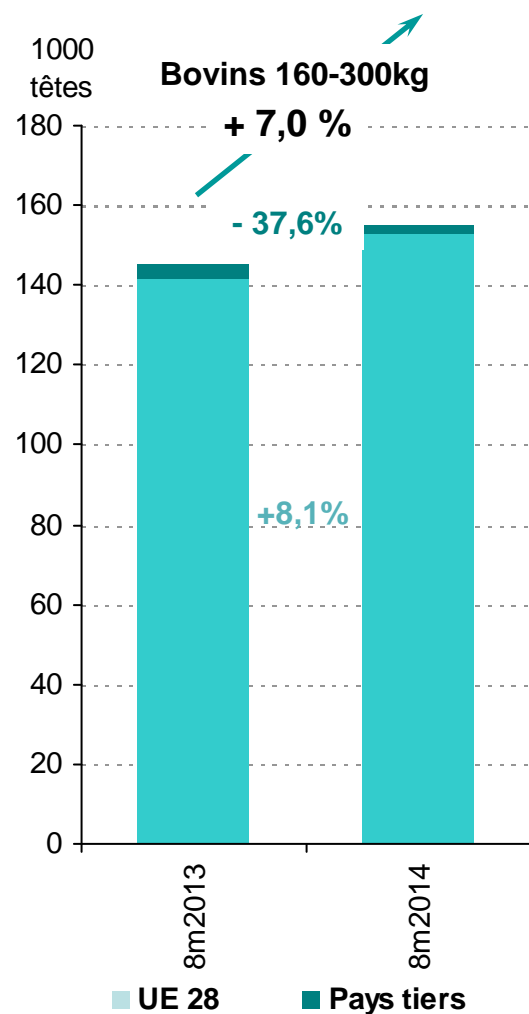
# Les importations italiennes de bovins maigres



# Exportations des broutards



## Diminution des ventes des bovins maigres les plus lourds



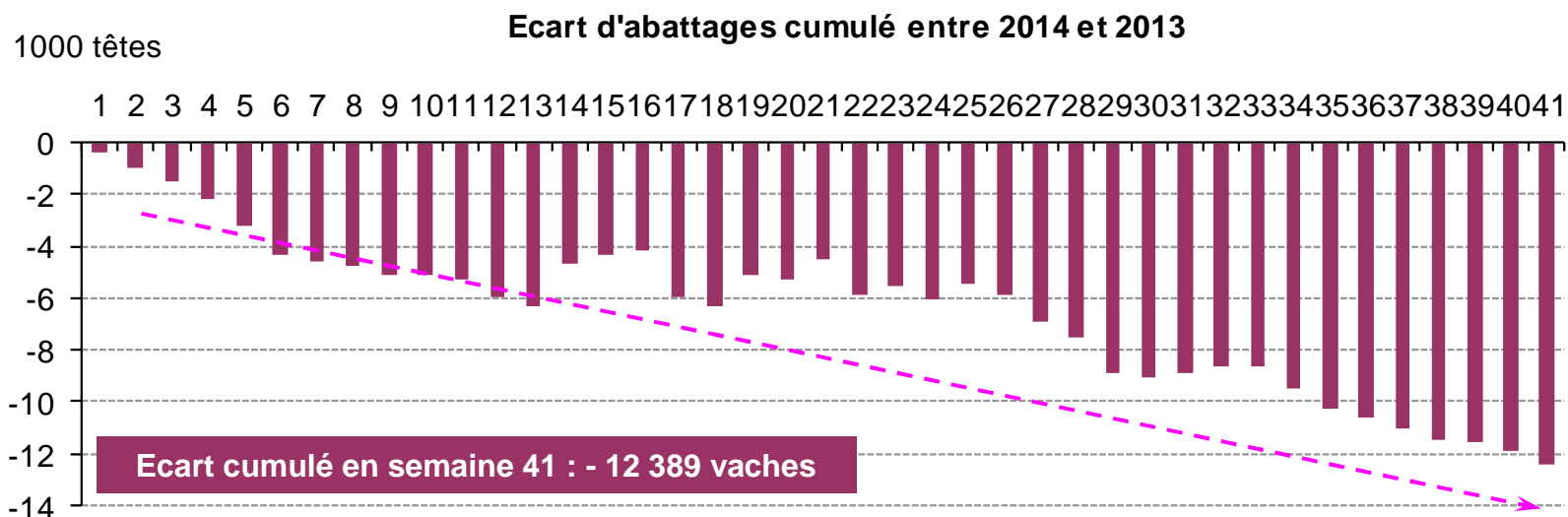
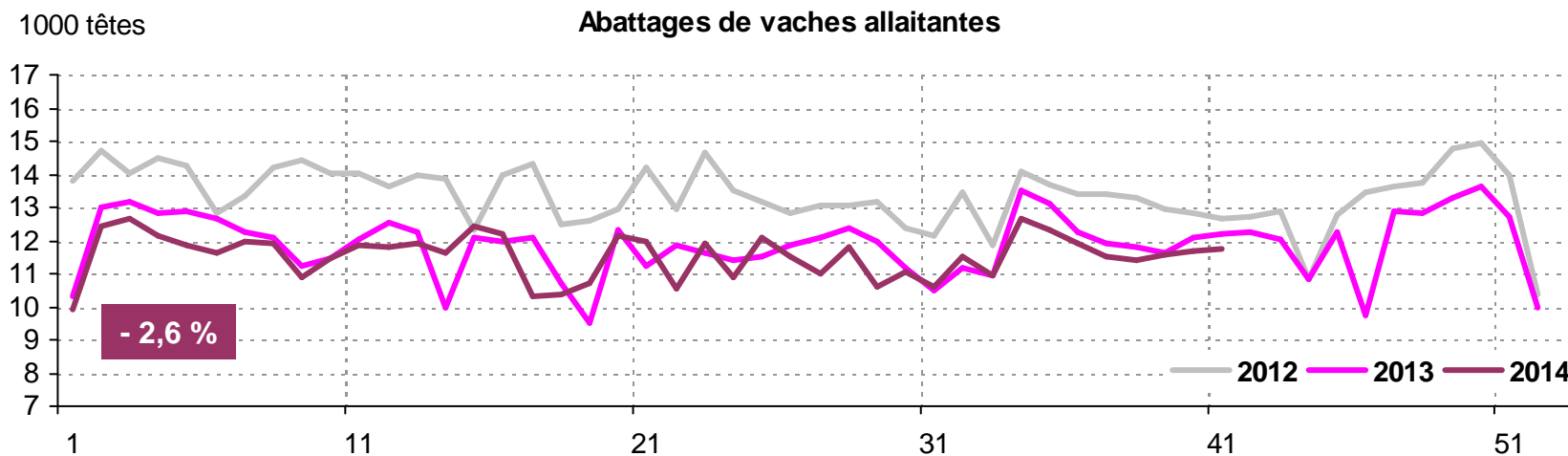


# Marché des bovins finis

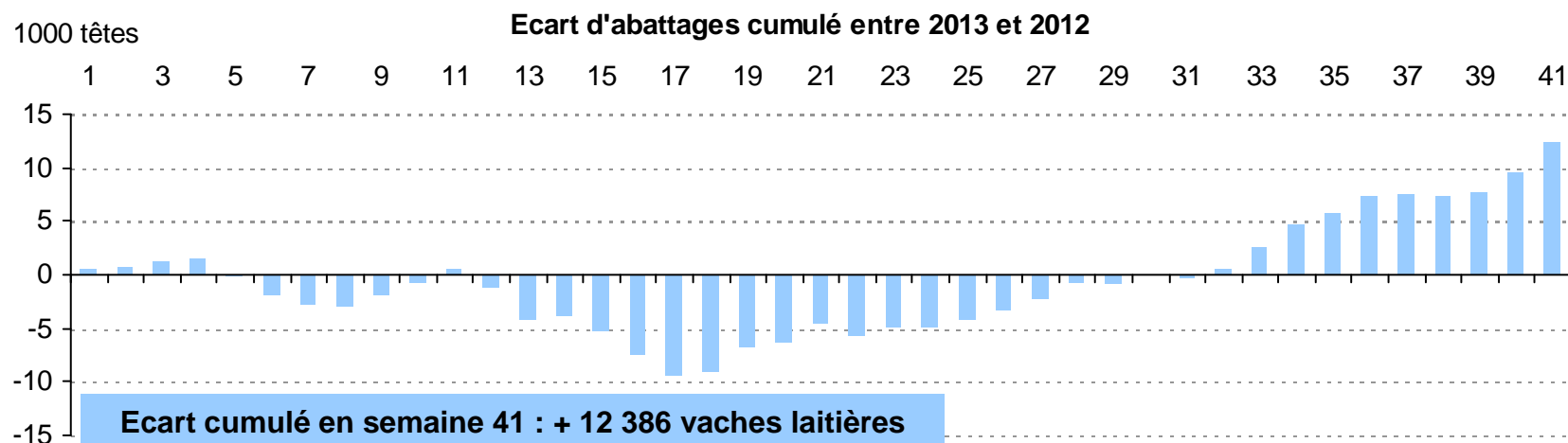
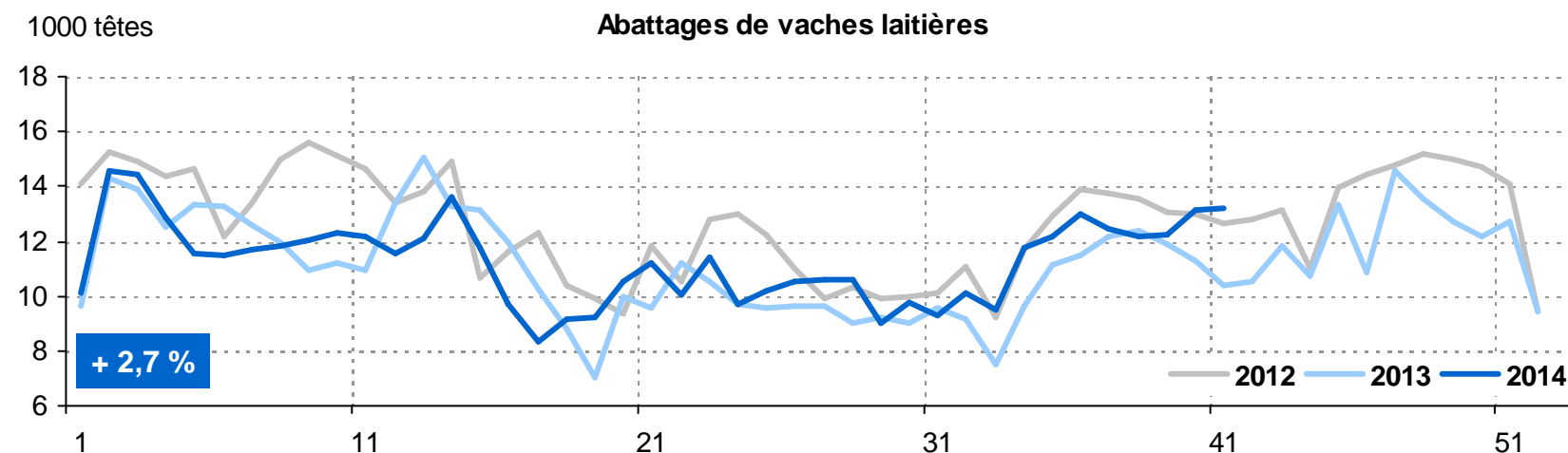
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# Repli des abattages de vaches allaitantes ...



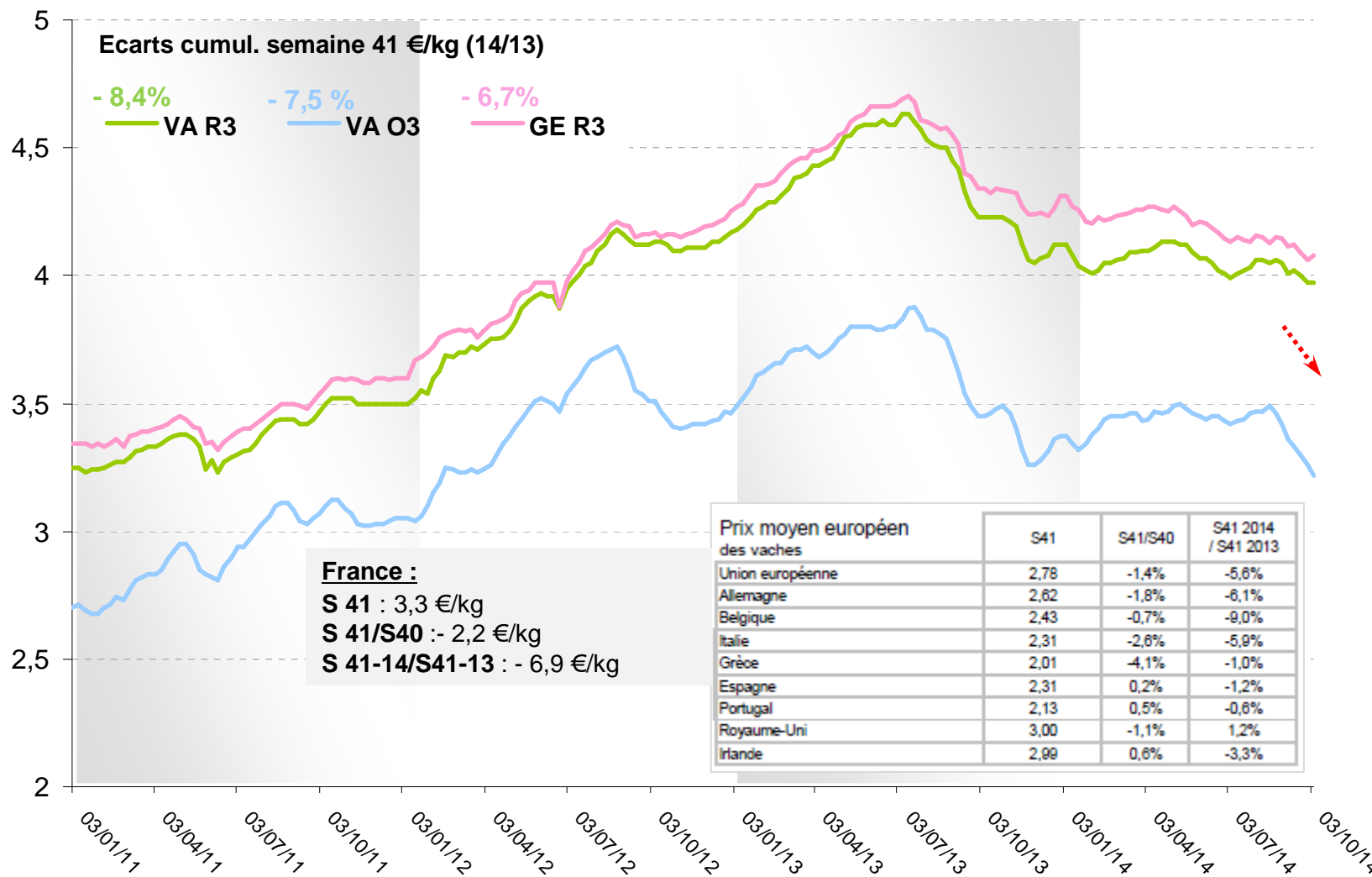
# En faveur des abattages de vaches laitières ...



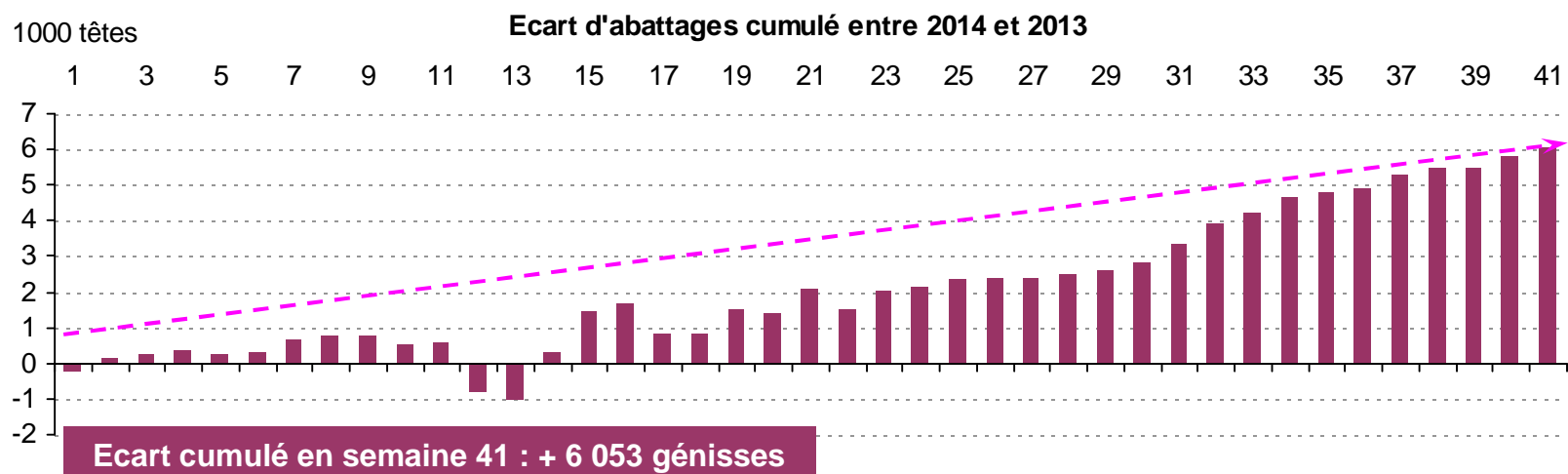
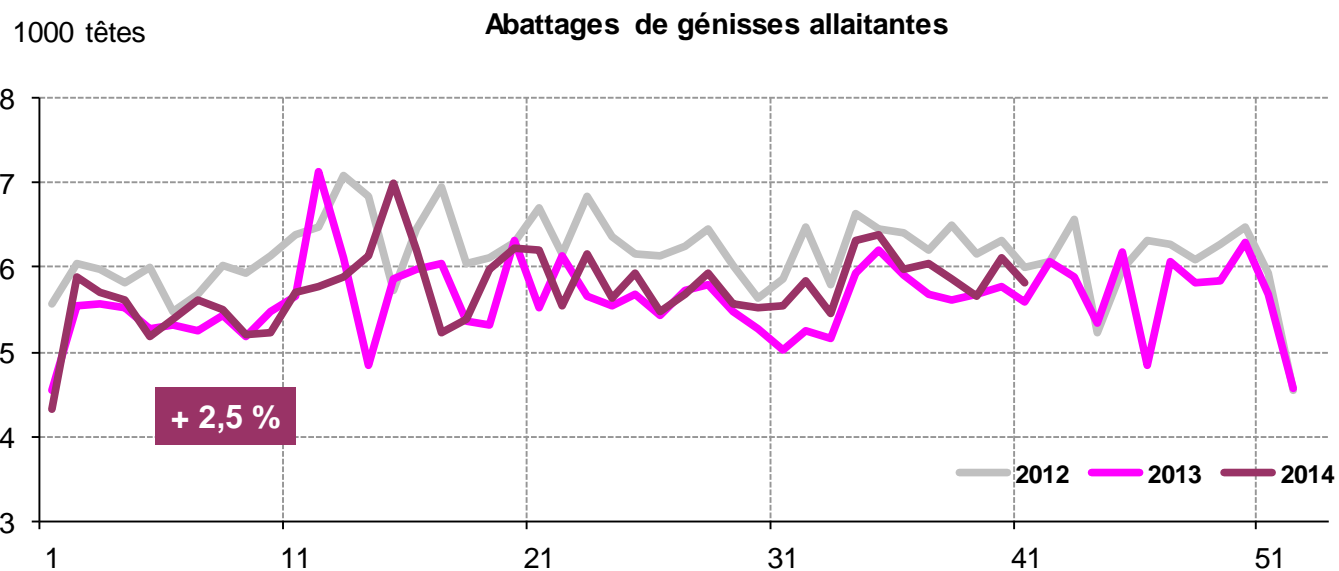
# Prix des femelles sur le premier semestre...

€/kg

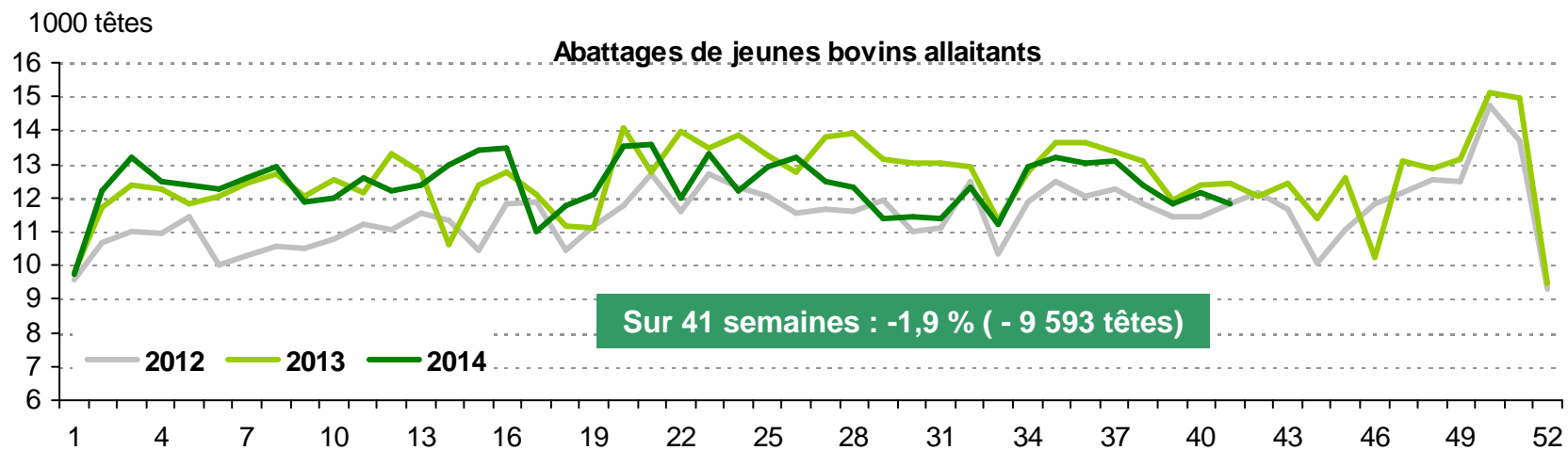
Cotations des vaches R3, O3 et des génisses R3



# Abattages de génisses, en augmentation



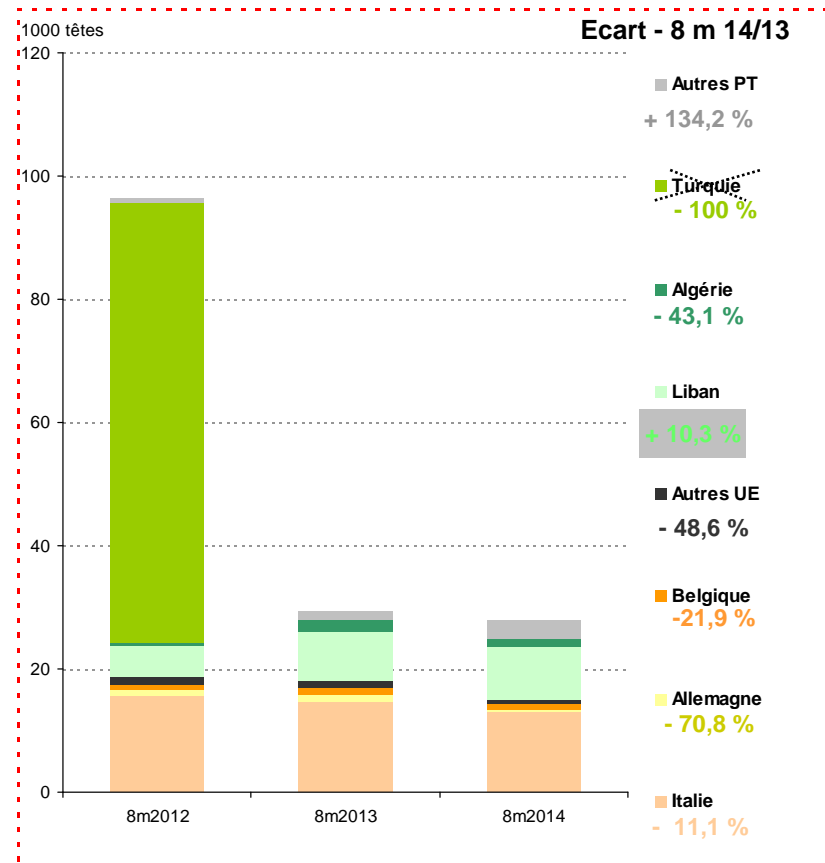
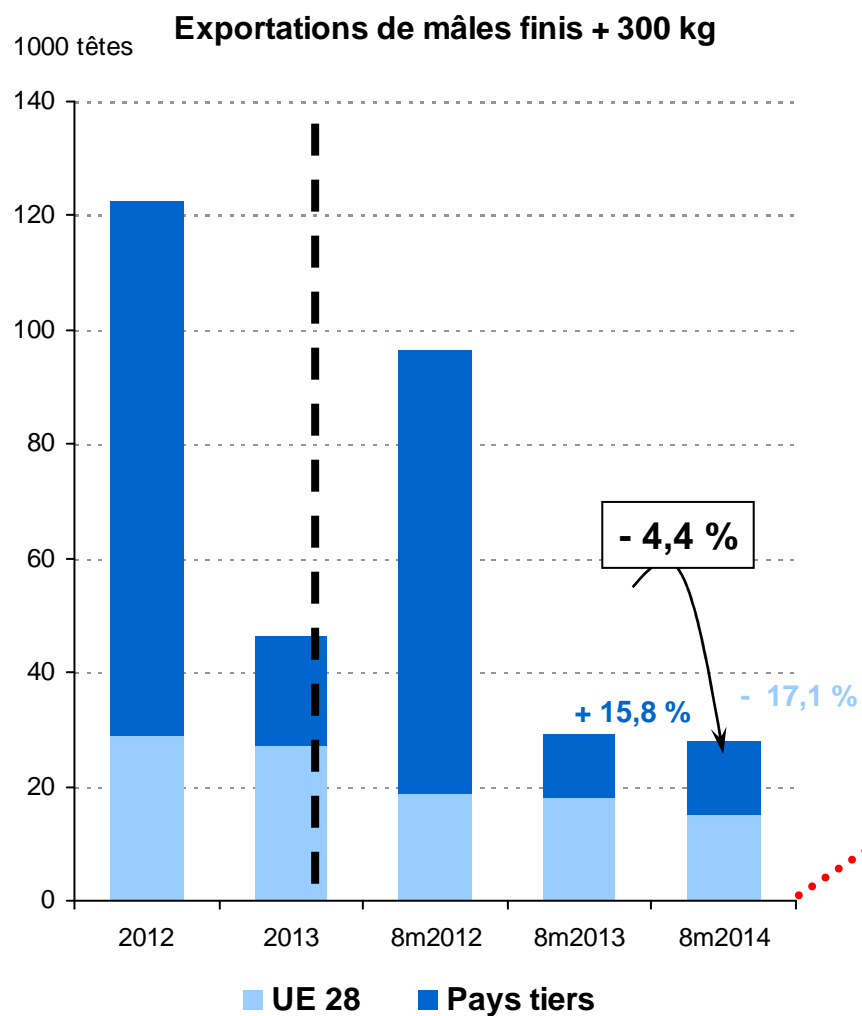
## Diminution des abattages de jeunes bovins...



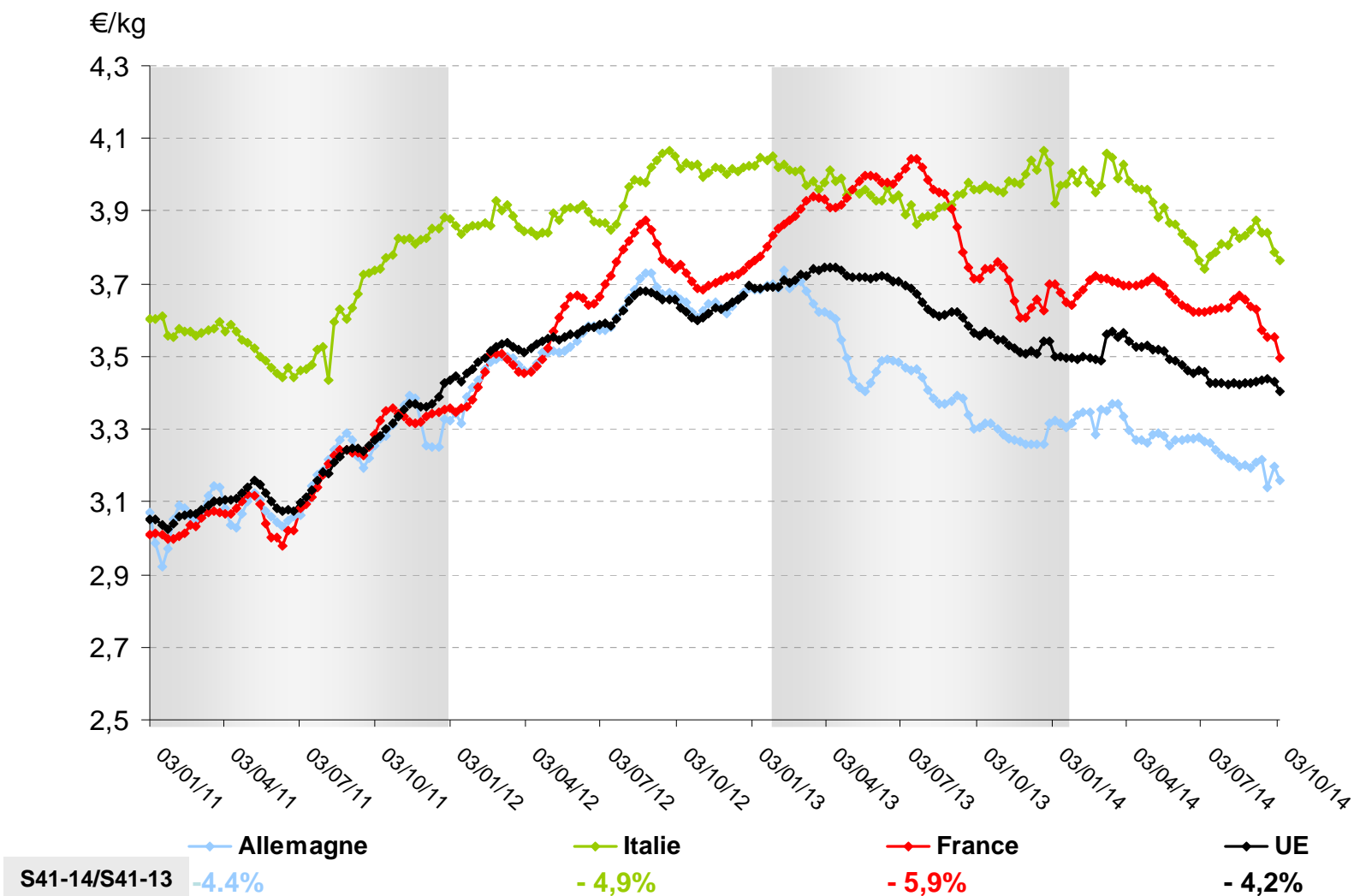
**Léger alourdissement des carcasses de  
JB allaitants : + 2,90 kg/tête**

(Moyenne semaines 41- 2014/13)

# Ralentissement des exportations de GB destinés à la boucherie



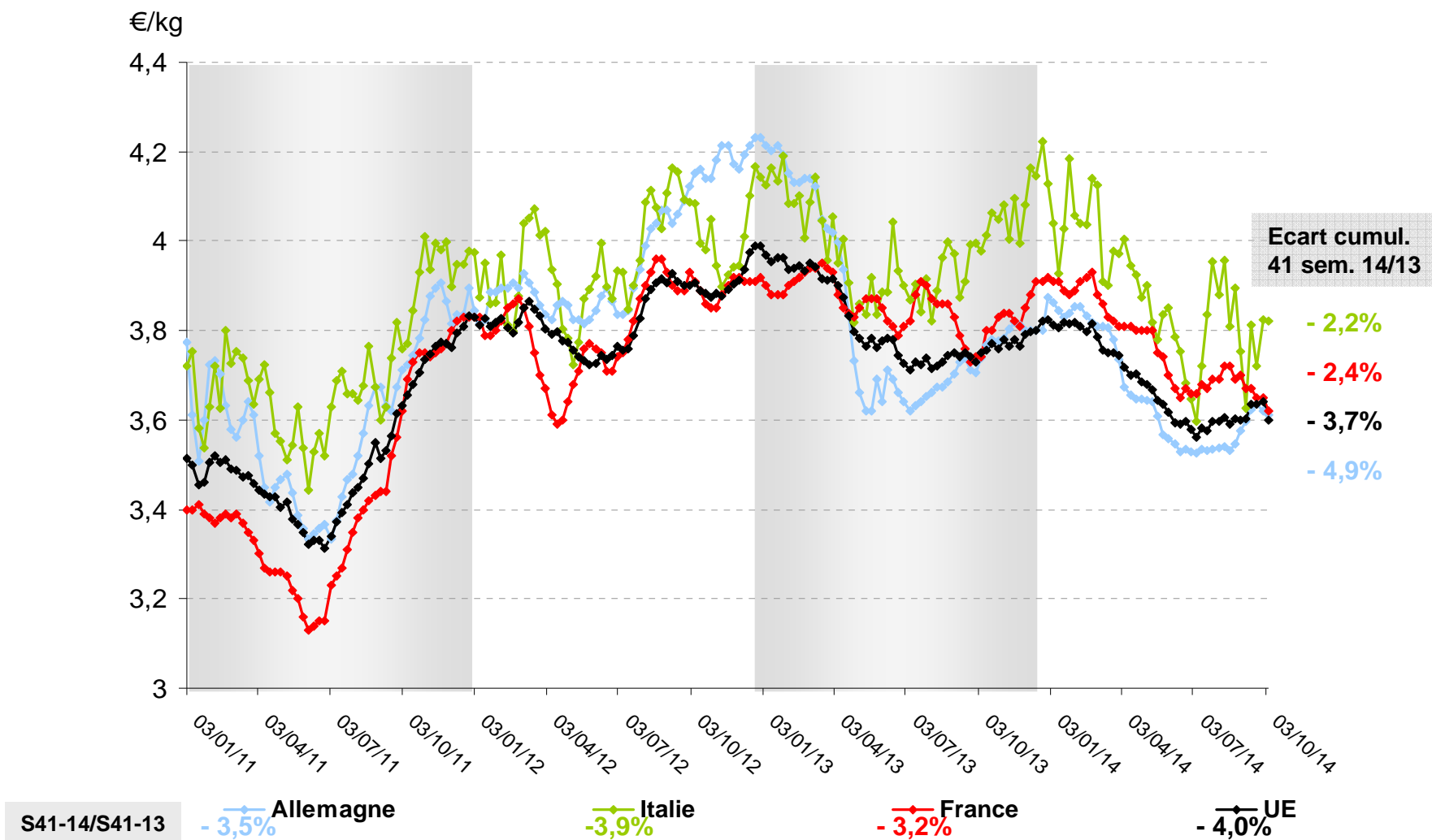
# Cours des gros bovins dans l'UE



ÉTABLISSEMENT NATIONAL DES PRODUITS DE L'AGRICULTURE ET DE LA MER

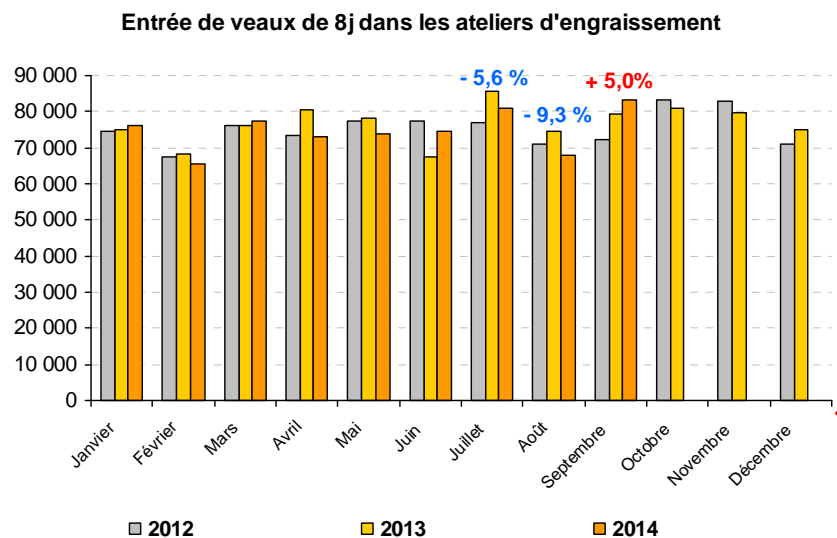
Source : FranceAgriMer, d'après Commission européenne

# Cours des Jeunes bovins R3 dans l'UE

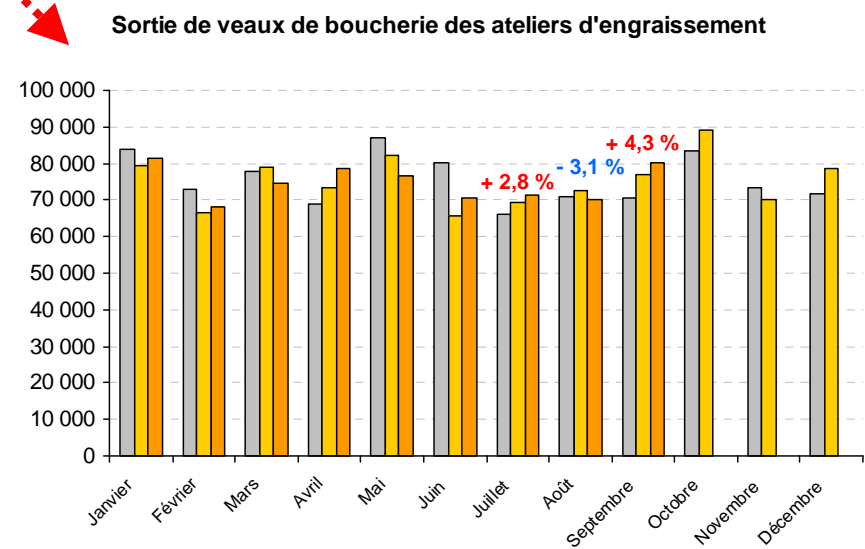




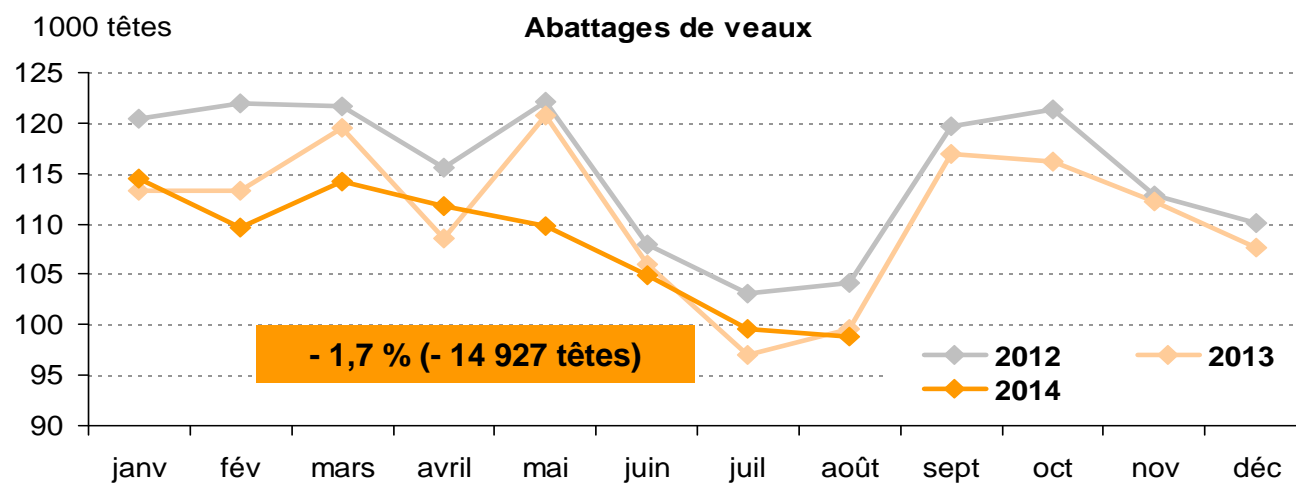
# Entrée et sortie des veaux de boucherie au 1<sup>er</sup> septembre



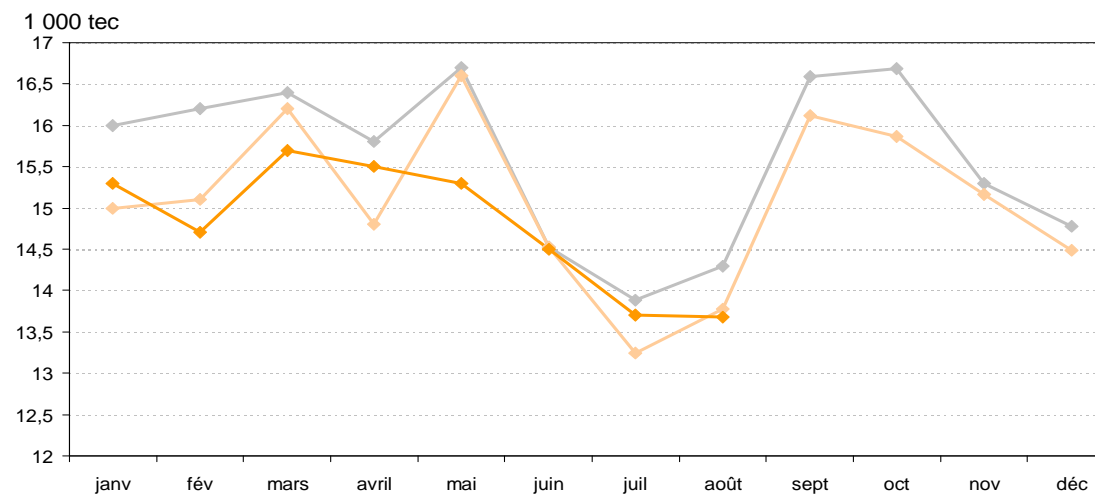
**9 m 14/13**  
 Entrée : - 1,9 % (-13 164 têtes)  
 Sortie : + 1 % (+ 6 677 têtes)



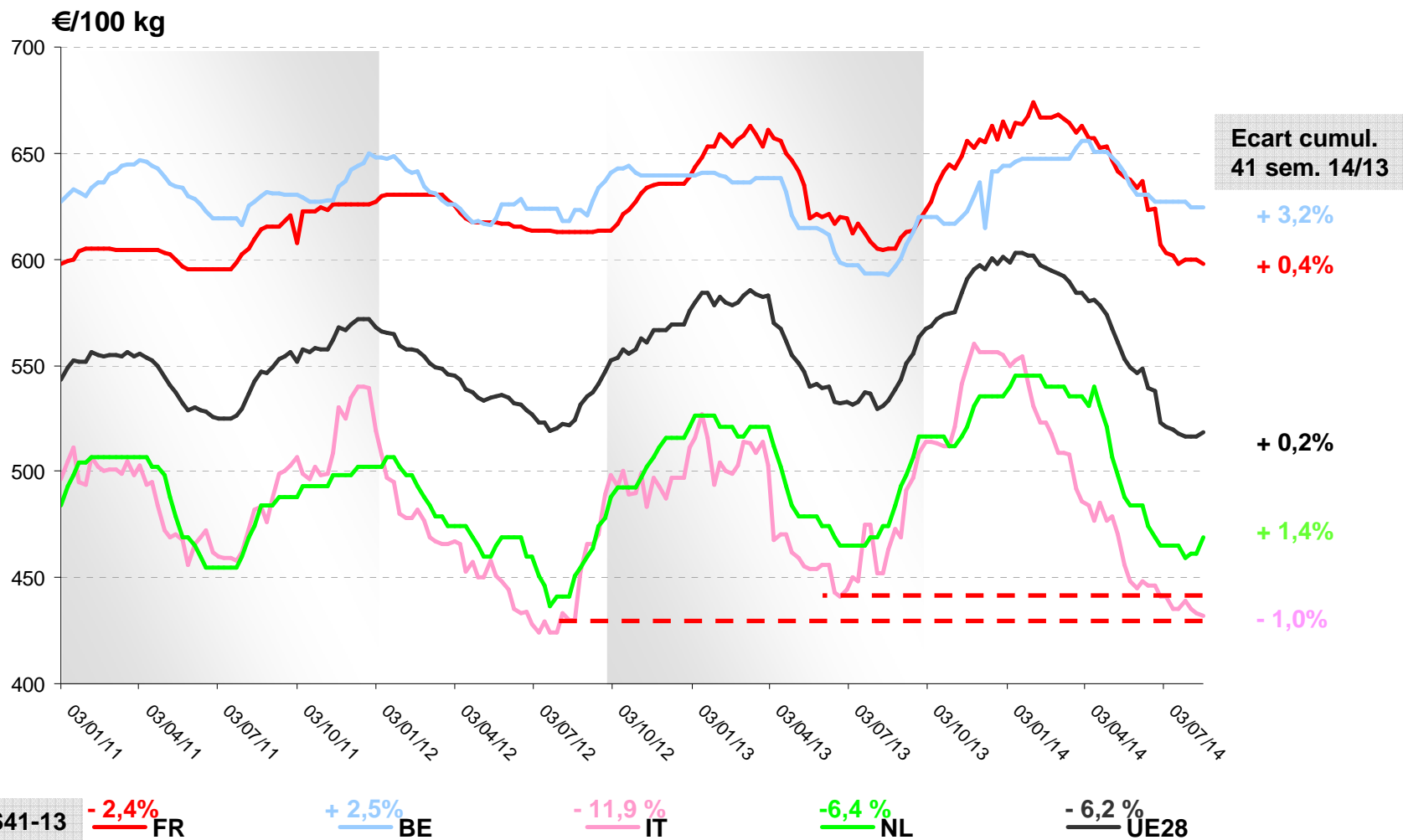
# Repli des abattages de veaux de boucherie



**- 0,8 % (- 942 tec)**



# Cotation des veaux de boucherie





# Point consommation

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## Viandes bovines

## Situation du marché des viandes ....

### Les importations

Viandes Fraîches	% Part de Marché (7 mois)			% Variation (14/13)
	2012	2013	2014	
Total Volume (1000 t)	129,921	136,478	131,699	-3,5
Pays-Bas	27,37	29,70	28,03	- 8,96
<b>Allemagne</b>	<b>19,91</b>	<b>17,86</b>	<b>20,56</b>	<b>11,07</b>
<b>Irlande</b>	<b>12,27</b>	<b>10,15</b>	<b>12,36</b>	<b>17,53</b>
Belgique	12,10	12,96	12,21	- 9,08
Italie	10,27	10,10	10,48	0,18
Espagne	6,31	6,33	5,68	- 13,37

### Les exportations

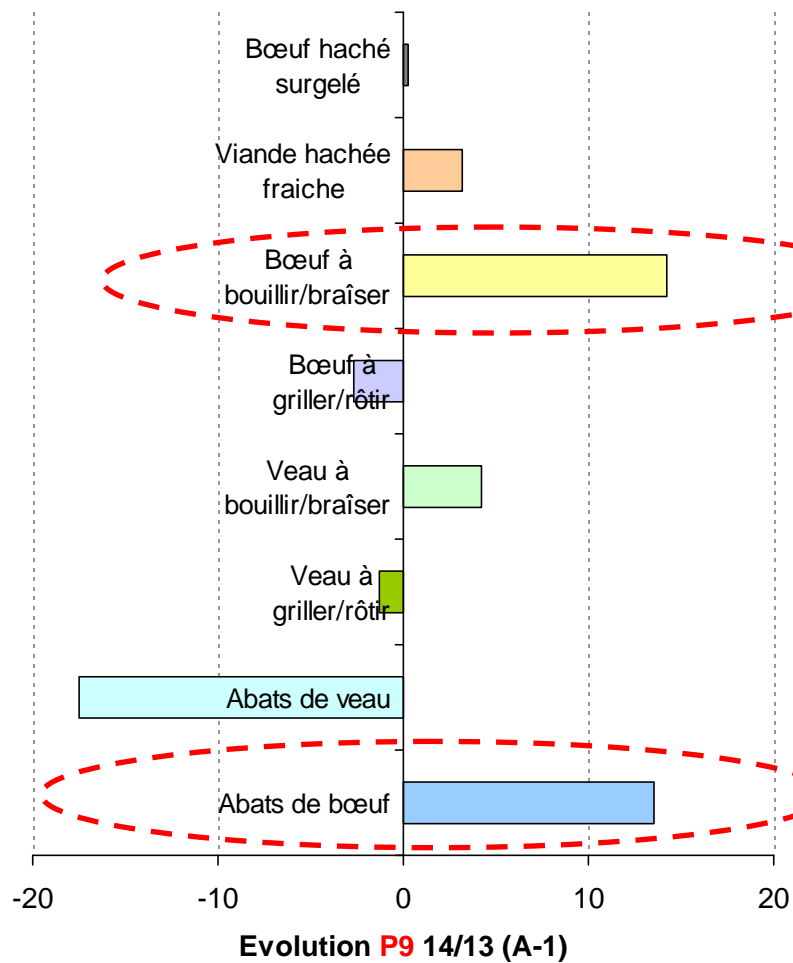
Viandes Fraîches	% Part de Marché (7 mois)			% Variation (14/13)
	2012	2013	2014	
Total Volume (1000 t)	130,67	118,666	106,738	- 10,05
Italie	41,17	43,47	46,79	- 3,18
Grèce	26,69	26,45	26,72	- 9,14
<b>Allemagne</b>	<b>15,28</b>	<b>17,22</b>	<b>16,33</b>	<b>- 14,72</b>

Viandes congelées	% Part de Marché (7 mois)			% Variation (14/13)
	2012	2013	2014	
Total Volume (1000 t)	43,591	40,707	39,314	- 3,42
Irlande	20,98	27,04	26,02	- 7,09
<b>Allemagne</b>	<b>16,98</b>	<b>15,68</b>	<b>16,68</b>	<b>2,70</b>
<b>Pologne</b>	<b>7,66</b>	<b>9,70</b>	<b>13,76</b>	<b>37,04</b>
Italie	20,13	18,64	13,59	- 29,60
Pays-Bas	15,27	10,56	10,04	- 8,22
<b>Espagne</b>	<b>6,74</b>	<b>6,70</b>	<b>7,57</b>	<b>9,06</b>

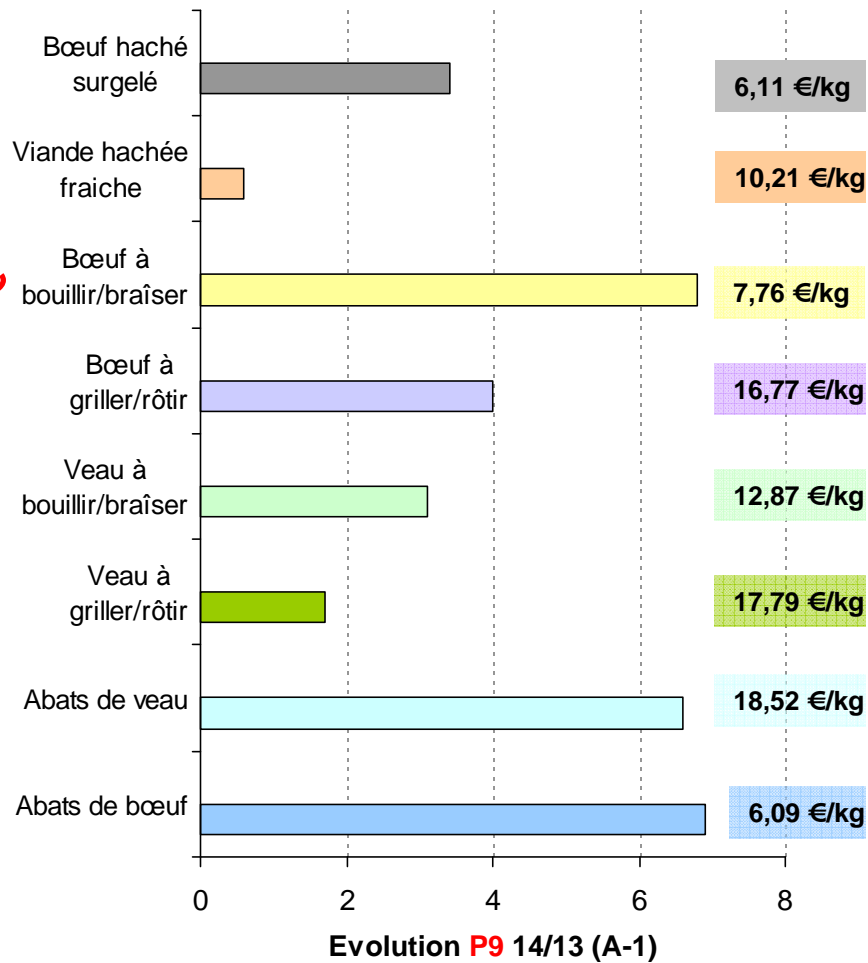
Viandes congelées	% Part de Marché (7 mois)			% Variation (14/13)
	2012	2013	2014	
Total Volume (1000 t)	7,901	7,851	9,842	25,36
<b>Belgique</b>	<b>27,74</b>	<b>26,61</b>	<b>26,16</b>	<b>23,27</b>
Espagne	20,75	18,37	10,64	- 27,42
<b>Italie</b>	<b>3,86</b>	<b>5,75</b>	<b>8,89</b>	<b>93,71</b>
<b>Hong Kong</b>	<b>1,44</b>	<b>4,27</b>	<b>8,05</b>	<b>136,23</b>
<b>Royaume- Uni</b>	<b>4,62</b>	<b>5,99</b>	<b>6,42</b>	<b>34,39</b>
Allemagne	9,36	8,58	6,26	- 8,49
<b>Irlande</b>	<b>0,48</b>	<b>1,01</b>	<b>5,33</b>	<b>564,21</b>

# Achats des ménages....

Evolution des **quantités** achetées

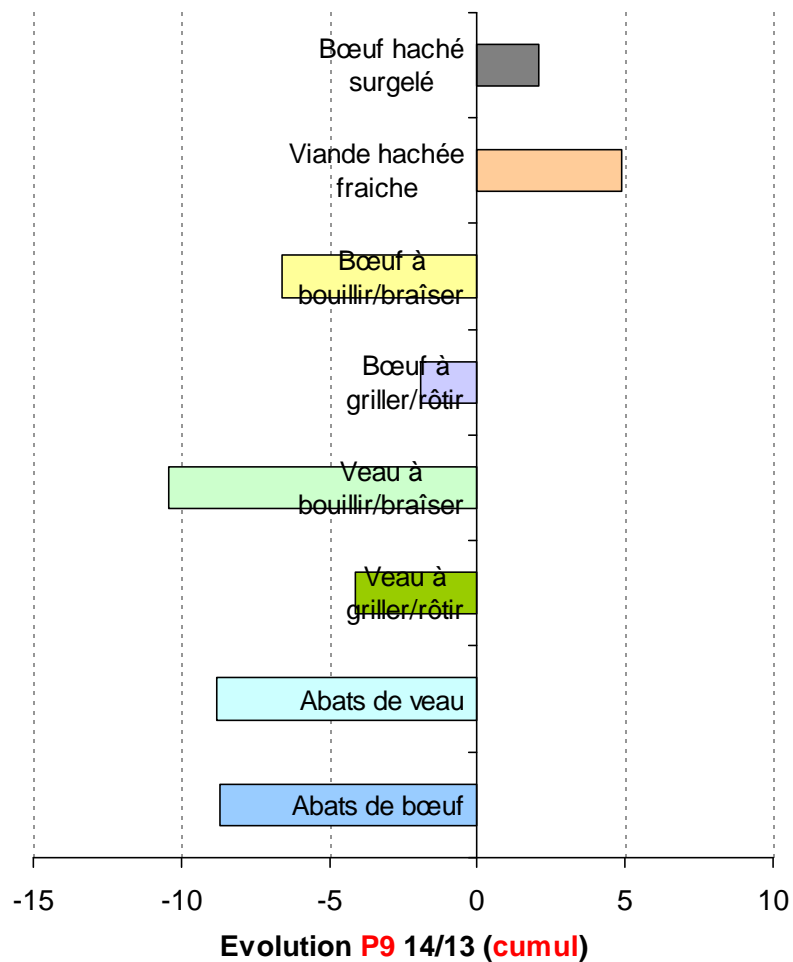


Evolution des **prix** d'achat



# Achats des ménages....

Evolution des **quantités** achetées



Evolution des **prix** d'achat

