UDK 636.03

Stručni članak
Professional paper

BEEF PRODUCTION IN THE EUROPEAN UNION AND THE CAP REFORM

An overview of situation and trends

M. Zjalić, A. Dimitriadou, Andrea Rosati

Production systems and economic importance of the EU beef and veal sector

The beef and veal sector contributes 10% to the total value of agricultural production in the EU, being the second biggest contributor after the dairy sector whose share represents 14% of the total value. In many regions, such as mountain and hilly areas of Central Europe, or countries like Ireland (25% of the agricultural GDP), it is a vital economic activity where few alternatives for other agricultural production exist. In addition to the sector's economic importance, extensive beef production systems play an important role in the protection and management of the environment (maintenance of countryside, control of weeds and bushes). Without this and other types of livestock, many areas would suffer serious environmental degradation and human depopulation.

With a total production of some eight million tons, the EU represents about 13% of the total production of beef and veal in the world. In the last decade, beef production in the EU-15 has been gradually declining with a total drop of 7,6% in 2003 compared with 1993. In 2004, beef production in the enlarged European Union (twenty five Member States) equalled to 1993 production in the EU-15. Production in other European countries also declined: in 2004 Europe produced 11,6 million tons of beef compared with 14,8 million t in 1993-95. During the same period, the global beef production increased by 6,3 million tons, or by 16,8% due to the substantial increase in other continents, particularly in South America (increase of 2,6 million tons or 26%).

One third of beef and veal produced in the European Union - directly or indirectly - comes from dairy herds, while two thirds are produced from specialised beef breeds and their crosses. The great variety of production systems developed in the last century is primarily based on natural conditions, farm structure and traditions. In general, there are two types of productions

Milan Zjalić, Antigoni Dimitriadou, Andrea Rosati, Europen association for animal production, Via G. Tomasssetti, 3 A/1, I-00161 Roma.

systems:

- Pasture-based systems located in the western fringes of the Continent. These systems are characterised by the utilisation of specialised beef breeds and calves of dairy breeds. Almost exclusive or prevailing use of pastures results in slower growth, heavier slaughter weight and more mature meat with a stronger taste.
- Cereal-based systems located in Central-Eastern Europe and in the Mediterranean use beef breeds and their crosses and dairy calves in a more intensive manner. They produce animals with lighter slaughter weight and lighter taste.

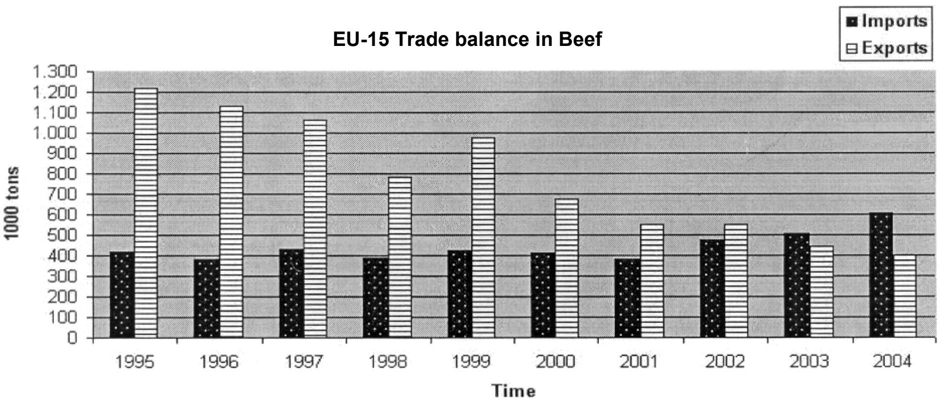
However, there are no strict limits between the two types of production systems: in Central Europe and the Mediterranean, pastures - particularly in mountains and on marginal agricultural land - are often used during the vegetation period, and feedlots for intensive finishing with cereal-based feeds can be found also in the Western parts of the Union.

The size of farms that produce beef and veal varies both among and within countries - from small family farms with several dairy or suckler cows, to large industrial type feedlots. Many farms which produce beef and veal, and which usually produce crops, keep also other farm animals or have an additional off-farm income. There are great national and regional varieties of types of final products produced on each production unit. They are determined by natural conditions, production system, market and tradition. Products available on the market include several groups and categories of animals, such as breeding material, slaughter calves, calves for fattening, light animals for fattening, light slaughter steers and bullocks, heavy finished animals, reformed cows differing primarily in the age and weight at the beginning and end of the production processes. For example, in Germany the age and weight at the beginning of the production process vary from 14 to 300 days and 45 to 400 kg while the age and weight of final products for the market vary from 100 days and 180 kg to 750 days and 740 kg. Some farms produce only one type of the final product for sale, while some are organised as closed systems, which include the complete production cycle - from cows to bulls from pasture or bulls for concentrate finishing.

Beef and veal production is not evenly distributed among regions and countries. Inter country trade in live bovines within the European Union in 2003-4 reached an average of nearly 3475 Mio €, while in the same period the average total value of trade in beef (live animals and meat) amounted to over 3785 Mio €.

Historically, the European Union has been a major beef exporter. During the last five years, the annual export of beef averaged 597 170 tons (varying from 973 000 tons in 1999 to 397 000 tons in 2004 - a decrease of 59%). The import of beef varied from 423 000 tons in 1999 to 608 000 tons in 2004 - an increase of 44%. During the same period, new Member States exported on average 144 170 tons of beef annually (varying from 121 000 tons in 1999 to 188 000 tons in 2004 - an increase of 55,2%) and imported 44 500 tons (with an increase of 171,5% between 1999 and 2004). A declining trend in export was due mainly to reduced production. Decline in beef production was caused mainly by the outbreak of diseases (BSE crisis, FMD) and consequent decline in consumption and demand for beef. In the same period, the beef sector in countries of the Central and Eastern Europe completed adjustments to the market conditions (sharp decline in domestic consumption, loss of export markets in the former USSR), which resulted in 30 to 50% lower production compared with the pre-transition period. Some policy changes introduced in the EU in line with agreements reached within the World Trade Organisation, such as reduced expenditures for domestic market support, decrease in export refunds and lower border protection, also contributed to the decrease of exports and increase of imports of beef. Decrease in supply of calves from dairy herds also affected the beef production: in 2004, the number of dairy cows was by 30% lower than in 1990 as a result of milk quotas and the constant increase in per cow milk production. Since 2003, EU is a net importer (Figure 1). The recovery of consumption also contributed to the decline of export surpluses.

Figure 1. - EU-15 IMPORTS AND EXPORTS OF BEEF



Source: Based on data retrieved from European Commission, Agricultural trade statistics

Consumption of beef and veal

Europeans like to eat beef and veal. Its nutritional values have been recognised since prehistoric times and confirmed by the contemporary research and scientific evidence. In the past, beef and particularly veal were found on the tables of the rich. Economic development and increase in the gross national product during the second half of the last century was accompanied by an increase in the physical availability and economic accessibility of meat. In a number of regions and countries, eating beef and veal has become a symbol of the improved economic position of farmers and industrial workers. Our culinary arts and traditions are rich in variety of recipes and specialties, from simple dishes such as the Italian *bollito* and *bistecca,* south-east European *kebab or cevap,* English roast beef, to more elaborated stews, such as Hungarian *goulash,* Old Polish style beef, and the superbly sophisticated French cuisine dishes like *boeuf bourguignon* and *daube provençale.*

European consumers have a great choice of beef cuts of fresh beef and veal as well as of convenience - ready to cook - or finished beef products. The general trend in the demand for agricultural products - higher quality for less money - has not by-passed the beef sector. The requirements of European consumers, in addition to price, safety and quality, include also compliance with environmental and animal welfare norms. Requirements in the niche market of beef of protected origin and quality include labelling and information on the locality and method of production.

In the previous several decades, the marketing of beef has been confronted with some negative connotations associated with red meat consumption (e.g. cholesterophobia). In addition, the BSE crisis and the impact of the outbreak of FMD in the nineties heavily affected beef consumption: in fact, beef and veal consumption per head increased from 18,2 kg/head in 1960 to almost 25 kg in 1985, and has since then declined again to 19,3 kg/head in 2000. However, beef consumption experienced a strong recovery in 2002, which was also confirmed in 2003. The European Union and its Member Countries reacted promptly by introducing a system of improved control of animal health, ban of slaughter of animals under risk, control of movements of live animals and meat, registration and identification of all cattle, as well the support of voluntary introduction of labelling of beef.

The 2001-2005 period was marked by a recovery of beef consumption and its stabilisation at the level of some 20 kg per year per head in the western and some 7 kg in the central and eastern part of the European Union. A programme financed by the European Commission aimed at informing consumers on the measures undertaken to ensure safety and quality of beef greatly contributed to the recovery of beef consumption.

During the last ten years, beef consumption fell dramatically in the new Member States (up to 50%) in line with the strong reduction in beef production. Low consumers' preferences for beef and the consumption of veal are also among the reasons for the great difference between new and old Member States. The new 10 Members produce 8% of the total beef and veal and consume 6% of the beef and veal consumption in the EU-25.

EU policies in support of the beef sector

In the European Union, as well as in the entire EAAP area, there is a market for beef and there are also the natural conditions, knowledge and skilled manpower available for different types for beef production in a variety of production systems. However, costs of production in EU and the rest of EAAP area are higher than in South America and Oceania. The Common Agricultural Policy (CAP), from the establishment of the European Common Market of six to the present Union of 25 Member States and four states under negotiations for joining, has always been a basic cohesive element geared towards meeting the needs and interests of consumers and farming communities in all EU Members. In the beef sector, it was basically oriented towards ensuring self-sufficiency by supporting production through border protection, price and income stability and payments to farmers in accordance with the number of animals kept. Over the years, the CAP increasingly focused on safety and quality of products, on giving farmers more confidence in their future income prospects and on encouraging more environmentally-sustainable farming practices.

CAP reform 2003 and the beef sector

Since its establishment in 1962, the CAP has undergone numerous changes, adapting its objectives and instruments to changing European and global conditions. The first major CAP reform took place in 1992, involving reduction of prices and provision of direct aids to farmers, rural development and environmental protection measures, and market-related issues. The second major reform followed in 1999 under the 'Agenda 2000' and dealt with such issues as the market orientation and competitiveness of agricultural products, more environmental considerations, a comprehensive rural development policy, simplification of legislation, and food quality and safety. The most recent CAP reform in 2003 is based on the necessity to further adapt EU agriculture to the ongoing developments in the global environment and in the structure of the EU itself. The challenges to face include growing public concern about food safety, environmental preservation, farm income, and sustainable development, in the context of an ever-larger European Union and an ever-demanding international trade setting.

The latest reform of the Common Agricultural Policy, agreed in June 2003, introduced the Single Payment Scheme (SPS), a system of annual aid paid to producers irrespective of production ('decoupled'). The SPS combines a number of existing direct payments received by farmers in a single payment, determined on the basis of payments received over a reference period. The June 2003 agreement established a maximum amount each State could use for direct aid payments - known as the national ceiling - based on the total of direct aids paid over a reference period in each Member State. Ceilings are established within the overall national ceilings for each of the main products for which aid was paid in the past.

Member States may opt to introduce the SPS in full, combining all aid in one payment or decide to maintain a proportion of direct aids to farmers in their existing form ('partial decoupling'), mainly where they believe there may be disturbance to agricultural markets or abandonment of production as a result of the move to the SPS.

Producer payments in the new EU members will be phased in over a 10-year period beginning in 2004, but converted to Single Farm Payments (SFP) in 2005 at 30 percent of the EU-15 level. Their SFPs will be based on their average area and yield between 1995 and 1999. During this period, yields in the 10 new member countries were only about half the level for the EU-15; as a result, SFPs for the incoming members will be lower than for EU-15 members.

Following the reform, beef payments are therefore either incorporated into the SPS, or they may be paid as follows in partially decoupled payments:

Member States can opt for keeping up to 100% of the 'suckler cow premium' and up to 40% of the 'slaughter premium for adult bovine animals' coupled. Alternatively, they may keep 100% of the slaughter premium for adult bovine animals coupled or, instead, up to 75% of the 'special male premium'. And finally, Member States may retain up to 100% of the 'calf slaughter premium' amounts to be made as a product-specific payment.

The premium rates for bovine animals (before application of the partial decoupling percentages) were:

Premium	Rate	CAP reform
Suckler cow premium	200 € / animal	Remains 100% coupled in Belgium, Spain, France, Austria and Portugal
Slaughter premium	80 € / animal	Remains 40% coupled in Spain, France, Austria, Portugal, and 100% in the Netherlands
Calf slaughter premium	50 € / animal	Remains 100% coupled in Belgium (Zone Nord), Spain, France, Netherlands, Austria, Portugal
Special male premium	150 or 210 € / animal (depending on type)	Remains 75% coupled in Denmark, Finland and 74,55% in Sweden

The extensification payment (currently ranging from EUR 40 per animal to EUR 100 per animal according to the density chosen by the Member State), additional payments and the deseasonalisation premium will be fully decoupled.

Where Member States decide to maintain product-specific aid payments, limits on those payments apply - via the national ceilings on the amount of aid available and limits on the number of animals which can generate entitlement to aid payments. There are also individual ceilings corresponding to the number of premium entitlements allocated to each farmer in the case of suckler cow premiums.

The single payment scheme came into operation on 1 January 2005. Member States may decide to apply the SPS after a transitional period (until 31 December 2005, or 31 December 2006), where special agricultural conditions so justify. Where the transitional option is taken, Member States must apply the 2004 rules relating to livestock aid payments - for example, limits on numbers of livestock kept per hectare of fodder area (stocking density) - and an extensification payment.

During the transition period, Member States must make annual additional payments to livestock farmers to ensure equal treatment between farmers and to avoid market and competition distortions. Member States may also grant a 'deseasonalisation premium' (the rate varies between EUR 18,11 and 72,45 per animal depending on slaughter date) aimed at encouraging the slaughter of cattle outside the off pasture period.

Public storage of beef plays a role in supporting the beef market. The EU now buys beef into 'intervention' stores only when average market prices in a Member State or a region of a Member State fall to below EUR 1 560/ton over two consecutive weeks. There is also a system of Private Storage Aid (PSA) under which private traders are encouraged, by means of a partial subsidy, to store beef temporarily at times of oversupply. Intervention is thus now regarded as a 'safety net' providing market support limited in time rather than a market management tool, and PSA is the preferred option to deal with temporary oversupply.

Member States may grant 'additional payments' to support agricultural activities that are important for the protection or enhancement of the environment or for improving the quality and marketing of agricultural productions, including the livestock sector. These 'additional payments' may use up to 10% of the funds that are available for a certain sector included in the single payment scheme in a Member State concerned. The additional payments must be within the overall ceilings laid down for the sector in question.

- National/regional flexibility

Member States have various options in the way they calculate and make payments: they may calculate SPS on the basis of individual farmers' direct payments during a past reference period, or average all past payment and paid uniformly over a region or state. Member States may either apply a mixed historic/flat rate approach that stays the same over time ('static'); or they may choose a mix that alters over time ('dynamic'), usually so that the proportion of SPS based on historic references reduces as the flat rate element increases, offering a means to transit from the basic to the flat rate approach.

In the first years after accession, the new members may opt for a different type of direct aid scheme - the 'Single Area Payment Scheme'. However, if they apply the SPS then the same rules apply as elsewhere in the EU (using the phasing in rates agreed in the accession treaties).

- Cross compliance and good environmental practices

Farmers must maintain their land in good agricultural and environmental conditions and respect other 'cross compliance' standards in order to receive SPS and other direct payments. Member States define minimum requirements for good agricultural and environmental conditions. There are also statutory management requirements, set up in accordance with 19 EU Directives and regulations relating to the protection of the environment including animal health and animal welfare. Livestock producers must comply with these rules if they wish to receive direct payments (SPS and/or partially coupled payments).

- Maintenance of permanent pastures

Member Sates are obliged to ensure that the area of permanent pasture does not decrease as a result of reforms. In case that the area of permanent pastures decreases significantly, the concerned Member State may introduce measures at the farm level to oblige farmers to maintain the share of permanent pasture on their holdings.

Prospects of the beef sector after the reforms

The Directorate-General for Agriculture and Rural Development of the European Commission has published an overview of market trends and medium-term projections of supply and demand for the main agricultural commodities and the likely developments of agricultural markets up to 2012, based on a certain number of assumptions and on the statistical information available in May 2005.

The medium-term income projections display a rather favourable outlook: the EU-25 agricultural income would grow by 11,7% between 2004 and 2012 in real terms and per labour unit (4% growth in the old and 50,4% in new Member States).

A steady demand and a tight domestic supply are expected to result in firm prices over the projection period, attracting more imports entering at full duty, notably high-quality beef cuts from South America. Total beef imports are expected to reach 0,6 million tons by the end of the projection period. Extra-EU-25 exports will be more and more constrained by low domestic availability and lower competitiveness and exports are projected to continue their declining trend, down to nearly 100 000 tons by 2012. It is expected to remain so over the projection period as production would decrease to around 7,6 million tons by 2012, in line with the structural reduction of the dairy herd and the impact of the introduction of the single farm payment. A tight domestic supply and a steady demand are projected to keep beef prices at a relatively high level, attracting more imports entering at full duty, notably from South America.

- Impact of CAP reform at the farm level

The introduction of the SPS will open broader possibilities for farmers to select the type of production, in accordance with market demand and production capacity of their farms. In some cases, it would require new investment and/or complete change of the production. Many researchers drew attention to the fact that investment decisions are usually made once or twice in the life span and that they also depend on the age of the decision maker. In spite of this, and other difficulties connected with new investments, some farms will be reconstructed and will change their production orientation, some will close operation due to ageing of the agricultural population or due to low profitability. The great majority of farms will continue operations. Among them, many will be enlarged to gain economies of scale and improve productivity.

In the case of beef producers, this would mean larger farms, improved genetics for better health, reproduction rate, increased daily gain and increased slaughter weight of animals, in addition to adherence to environmental and animal welfare requirements. There is a need for each farm to develop its own strategy with regard to its adjustment to the new CAP. Farmers rightly expect to be assisted by their associations, relevant state and regional services and research institutions. This process will be facilitated by the establishment of the Farm Advisory Service, as stipulated by the Council Regulation 1782/2003.

- Mid-term review and monitoring of reform impact

The European Commission will undertake a mid-term review in 2008 so as to analyze the policy impact of the revised Common Agricultural Policy and propose the necessary corrections and changes, if required. The implementation of the reformed policy will be monitored at farm, regional and national levels by professional and research institutions, state administrations and farmers' unions.

EAAP: Services offered to the EU Beef sector

- Role of the EAAP Beef Task Force

In June 2005, the EAAP Council established the Beef Task Force (BTF) within its Cattle Network Working Group to monitor developments in the beef sector in Europe, to identify research needs and priorities in developing tools and methods for policy impact analysis and for monitoring and analysis of farm strategies. It is composed of experts and researchers from the EU Member States representing some 80% of the beef production in the European Union. The BTF has agreed on the methods of defining standard procedures for monitoring and analyzing economic efficiency of beef farm operations. In addition to its role in policy analysis, it will also serve as a forum for the exchange of information and experience and as a body for the development and coordination of Community financed research projects within the scope of its mandate and expertise. Its findings and recommendations will be forwarded to the EAAP Council, to Member Organizations and to national and EU representative farmers associations.

- Role and future steps of EAAP

EAAP, as the unique organization composed of national representative bodies encompassing animal research and science, administration and animal industry, is best placed to provide this type of services to its Members, particularly in view of the fact that out of 38 national member organizations, 23 come from the EU Member States and four from the EU candidate countries.

Through the programs and activities of its technical bodies (Study Commissions on Cattle and on Farm Animal Production Systems, Cattle Network Working Group and Beef Task Force) it will support national efforts in monitoring and analysis of impact of SPS on various production systems, of developments in beef production and consumption in Europe and of the impact of global trends on the European situation.

Research programs of the EAAP Members also include genetics, nutrition, farm management and health as scientific disciplines with a direct bearing on the efficiency of the beef sector. Annual meetings of EAAP are fora for the exchange of information on results and achievements in the field of animal research. Sessions of study commissions and working groups as well as numerous symposia deal with specific issues related to animal production, quality and safety of animal products and technical and economic efficiency of the animal industry. Research results are published in EAAP scientific and technical series.

Upcoming symposia to be organised during the EAAP meetings in 2006 (Antalya, Turkey) and 2007 (Dublin, Ireland) will deal with cattle production in the eastern part of Europe and with the impact of the CAP reform on beef production, respectively. The second symposium will also discuss reports of the Beef Task Force on the impact of the implementation of the SPS in the beef sector.

Cattle Network website (www.cattlenetwork.net): contains information on key topics and events in fields related to the cattle industry, including EU policy, markets, prices, training and job opportunities, new publications, fairs and activities of professional organizations and associations of cattle producers and breeders.

REFERENCES

1. Commission Regulation (EC) No 795 of 21 April 2004 (OJ L 141, 30.04.2004)
2. Commission Regulation (EC) No 796 of 21 April 2004 (OJ L 141, 30.04.2004)
3. Commission Regulation (EC) No 1973 of 29 October 2004 (OJ L 345, 20.11.2004)
4. Council Regulation (EC) No 1782 of 29 September 2003 (OJ L 270, 21.10.2003)

5. Cunningham E.P. and the European Association for Animal Production (Eds), 2003, *After BSE - A future for the European livestock sector,* Wageningen Academic Publishers, EAAP publication no 108
6. European Commission, Directorate-General for Agriculture, 2003, *Reform of the Common Agricultural Policy. Medium-term prospects for agricultural markets and income in the European Union 2003-2010* http://europa.eu.int/comm/agriculture/publi/caprep/prospects2003b/fullrep.pdf
7. European Commission, Agricultural trade statistics: http://europa.eu.int/comm/agriculture/agrista/tradestats/index_en.htm
8. European Commission, Agriculture: http://europa.eu.int/comm/agriculture/index_en.htm
9. European Commission, CAP reform http://europa.eu.int/comm/agriculture/capreform/index_en.htm
10. FAOSTAT - FAO Statistical Databases 2005 http://faostat.fao.org

PROIZVODNJA GOVEDINE U EUROPSKOJ UNIJI I REFORMA CAP-a

Pregled stanja i trendova

Sustavi proizvodnje i ekonomska važnost sektora govedine i teletine u Europskoj uniji

Sektor govedine i teletine pridonosi 10% ukupne vrijednosti poljoprivredne proizvodnje u EU te je drugi najveći prinosnik nakon mljekarskog sektora čiji udio predstavlja 14% ukupne vrijednosti. U mnogim područjima kao što su planinska i brdovita područja Srednje Europe ili zemlje poput Irske (25% poljoprivrednog BDP-a) to je temeljna gospodarska djelatnost gdje postoji malo alternativa za poljoprivrednu proizvodnju. Osim ekonomske važnosti sektora veliki sustavi proizvodnje govedine igraju važnu ulogu u zaštiti i upravljanju okolišem (održavanje sela, kontrola korova i grmlja). Bez ove i drugih vrsta stoke mnoga bi područja trpjela ozbiljno propadanje okoliša i raseljavanje ljudi.

S ukupnom proizvodnjom od nekih osam milijuna tona EU predstavlja oko 13% ukupne svjetske proizvodnje govedine i teletine. U zadnjem desetljeću proizvodnja govedine u EU-15 postupno se smanjivala do ukupnog pada od 7,6% u 2003. godini u usporedbi s 1993. Godine 2004. proizvodnja govedine u proširenoj Europskoj uniji (dvadeset i pet članica) bila je jednaka proizvodnji

1993. u EU-15. Proizvodnja u drugim europskim zemljama također je pala: u 2004. Europa je proizvela 11,6 milijuna tona govedine u usporedbi s 14,8 milijuna tona u 1993-95. U istom razdoblju svjetska proizvodnja govedine povećala se za 6,3 milijuna tona ili za 16,8% zahvaljujući znatnom porastu na drugim kontinentima, osobito u Južnoj Americi (porast od 2,6 milijuna tona ili 26%).

Jedna trećina govedine i teletine proizvedena u Europskoj uniji -izravno ili neizravno - je od mliječnih stada dok su dvije trećine proizvedene od pasmina specijaliziranih za govedinu i njihovih križanaca. Velika raznolikost u sustavima proizvodnje koja se razvila u prošlom stoljeću prvenstveno se temelji na prirodnim uvjetima, strukturi farma i tradiciji. Uglavnom postoje dva tipa sustava proizvodnje:

- Sustavi koji se temelje na ispaši smješteni na zapadnim rubovima Kontinenta. Ove sustave obilježava iskorištavanje specijalnih pasmina i teladi mliječnih pasmina. Gotovo potpuno ili pretežno korištenje paše ima za posljedicu sporiji rast, veću klaoničku težinu i zrelije meso jačeg okusa.
- Sustavi koji se temelje na žitaricama smješteni u srednjoistočnoj Europi i na Mediteranu koriste pasmine za meso i njihove križance na intenzivniji način. Oni daju životinje manje težine pri klanju i laganijeg okusa.

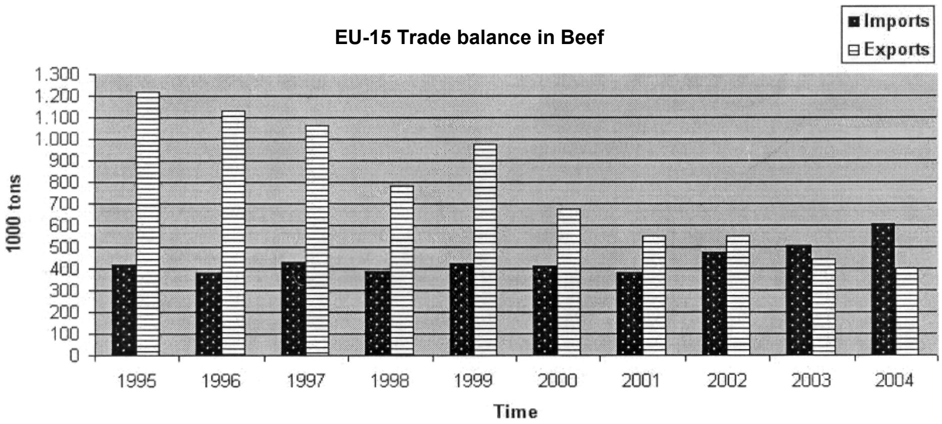
Međutim, ne postoje stroge granice između ova dva tipa proizvodnog sustava: u Srednjoj Europi i na Mediteranu pašnjaci s - osobito u planinama i na rubovima poljoprivredne zemlje - često koriste u vrijeme vegetacije, a tovilišta za intenzivno dovršavanje krmivima na bazi žitarica mogu se također naći u zapadnim dijelovima Unije.

Veličina farma koje proizvode govedinu i teletinu varira i unutar zemalja - od malih obiteljskih gospodarstava s nekoliko mliječnih ili dojnih krava do velikih tovilišta industrijskog tipa. Mnoge farme koje proizvode govedinu i teletinu a koje obično proizvode i žitarice, također drže druge domaće životinje ili imaju dodatne prihode izvan farma. Postoje velike nacionalne i regionalne raznolikosti vrsta gotovih proizvoda u pojedinoj proizvodnoj jedinici. Njih određuju prirodni uvjeti, proizvodni sustav, tržište i tradicija. Proizvodi dostupni na tržištu uključuju nekoliko skupina i kategorija životinja kao što su rasplodni materijal, telad za klanje, telad za tov, lagane životinje za tov, lagani junci i volovi za klanje, teške završne životinje, poboljšane krave koje se razlikuju, prvenstveno po dobi i težini na početku i kraju proizvodnih procesa. Na primjer, u Njemačkoj dob i težina na početku proizvodnog procesa variraju od 14 do 300 dana i od 45 do 40 kg do 750 dana i 740 kg. Neki farmeri proizvode samo jedan tip finalnog proizvoda za prodaju dok su neki organizirani kao zatvoreni sustavi, što uključuje čitav proizvodni ciklus - od krava do bikova, od pašnjaka ili bikova za završavanje s koncentratom.

Proizvodnja goveda i teladi nije jednako raspodijeljena među regijama i zemljama. Trgovina živih goveda među zemljama unutar EU 2003-4. godine postigla je prosjek od gotovo 3 475 milijuna Eura dok je u istom razdoblju prosječna ukupna vrijednost trgovine goveda (žive životinje i meso) iznosila preko 3 785 mil. Eura.

Povijesno, Europska unija je najveći izvoznik govedine. U zadnjih pet godina godišnji izvoz govedine iznosio je prosječno 597 170 tona (varirajući od 973 000 tona 1999. do 597 000 tona 2004. - smanjenje od 59%). Uvoz govedine varirao je od 423 000 tona 1999. do 680 000 tona 2004. - porast od 44%. U istom razdoblju nove države članice izvezle su prosječno 144 170 tona govedine godišnje (varirajući od 121 000 tona 1999. do 188 000 tona 2004. - porast od 55.2%) i uvezle su 44 500 tona (s porastom od 171,5% između 1999. i 2004.). Trend opadanja izvoza posljedica je uglavnom smanjenja proizvodnje. Pad proizvodnje govedine prouzročila je uglavnom pojava bolesti (BSE kriza, FMD) te posljedični pad potrošnje i potražnje za govedinom. U istom razdoblju u sektoru govedine u zemljama Srednje i Istočne Europe završena je prilagodba tržišnim uvjetima/nagli pad domaće potrošnje, gubitak izvoznog tržišta u bivšem SSSR-u, što je rezultiralo nižom proizvodnjom od 30 do 50% u usporedbi s razdobljem prije tranzicije. Neke promjene u politici, uvedene u EU u skladu sa sporazu-mima postignutim unutar Svjetske trgovinske organizacije kao što su smanjenje izdataka za potporu domaćem tržištu, smanjenje izvoznih naknada i manja carin-ska zaštita, također su doprinijeli smanjenju izvoza i povećanju uvoza govedine. Smanjenje dobave teladi iz mliječnih stada također je pogodilo proizvodnju govedine: 2004. broj mliječnih krava bio je 30% niži nego 1990. kao posljedica mljekarskih kvota i stalnog porasta proizvodnje mlijeka po kravi. Od 2003. EU je čisti uvoznik (Slika l). Oporavak potrošnje također je doprinesao padu izvoznih viškova.

Slika 1. - EU-15 UVOZ I IZVOZ GOVEDINE



Izvor: Na temelju podataka dobivenih od Europske komisije, Statistika poljoprivredne trgovine.

Potrošnja govedine i teletine

Europljani vole jesti govedinu i teletinu. Njihove hranidbene vrijednosti priznaju se već od prethistorijskog doba, a potvrdili su ih i suvremeno istraživanje i znanstveni dokazi. U prošlosti, govedina, a naročito teletina, nalazili su se na stolu bogatih. Gospodarski razvoj i rast bruto nacionalnog proizvoda tijekom druge polovice prošlog stoljeća pratio je porast fizičke i ekonomske dostupnosti mesa. U brojnim područjima i zemljama jedenje govedine i teletine postalo je simbol boljeg ekonomstog položaja farmera i industrijskih radnika. Naše kulinarsko umijeće i tradicija obiluju receptima i specijalitetima od jednostavnih jela kao što su talijanski bollito i bistecca, jugoistočni europski kebab ili ćevap, engleska pečena govedina, do profinjenijih jela kao mađarski gulaš, govedina u starom poljskom stilu te izvrsna sofisticirana jela francuske kuhinje kao boeuf bourguignom i daube provencale.

Europski potrošači imaju veliki izbor goveđih odrezaka svježe govedine i teletine kao i polugotova jela pripremljena za kuhanje - ili gotove goveđe proizvode. Opći trend u potrošnji poljoprivrednih proizvoda - viša kakvoća za manje novca - nije mimoišao niti sektor govedine. Zahtjevi europskih potrošača osim cijene, sigurnosti i kakvoće uključuju i udovoljavanje normama okoliša i dobrobiti životinja. Zahtjevi u niši tržišta govedinom zaštićenog podrijetla i kakvoće uključuju označavanje podataka o mjestu i načinu proizvodnje.

U nekoliko prošlih desetljeća prodaja govedine suočena je s nekim negativnim konotacijama u vezi s trošenjem crvenog mesa (npr. kolesterofobija). Osim toga kriza BSE i djelovanje pojave FMD devedesetih ozbiljno su ugrozili potrošnju govedine: u stvari, potrošnja govedine i teletine po glavi porasla je od 18,2 kg/glavi 1960. do skoro 25 kg 1985., a odonda je ponovno pala na 19,3 kg/glavi 2000., što je također potvrđeno 2003. Europska uniji i zemlje članice odmah su djelovale uvođenjem sustava pojačanog nadzora zdravlja životinja, zabranom klanja rizičnih životinja, nadzorom kretanja živih životinja i mesa, registriranjem i identificiranjem svih goveda, kao podrškom dobrovoljnom uvođenju markica za govedinu.

Razdoblje 2001-2005 označio je oporavak potrošnje govedine i njezino stabiliziranje na razini od nekih 20 kg godišnje po glavi u zapadnom i 7 kg u srednjem i istočnom dijelu Europske unije. Program koji je financirala Europska komisija imao je za cilj obavještavati potrošače o poduzetim mjerama za osiguranje sigurnosti i kakvoće govedine, te je uvelike doprinesao oporavku potrošnje govedine.

Zadnjih deset godina potrošnja govedine dramatično je pala u državama članicama (do 50%) u skladu s velikim smanjenjem proizvodnje govedine. Slaba sklonost potrošača za govedinu i potrošnju teletine također su među razlozima velike razlike između novih i starih država članica. Novih 10 članica proizvodi 8/4 ukupne govedine i teletine i troši 6% potrošnje govedine i teletine u EU-25.

Politika EU u podupiranju sektora govedine

U Europskoj uniji kao i na čitavom području EAAP postoji tržište za govedinu i postoje prirodni uvjeti, znanje i kvalificirana ljudska snaga za razne vrste proizvoda govedine u raznim sustavima proizvodnje. Međutim, troškovi proizvodnje u EU i ostalim područjima EAAP viši su nego u Južnoj Americi i Oceaniji. Zajednička poljoprivredna politika (CAP) od osnivanja Europskog zajedničkog tržišta šestorice do današnje Unije 25 zemalja članica i četiri zemlje u pregovorima za ulazak uvijek je bila temeljna poveznica usmjerena na udovoljavanje potrebama i interesu potrošača i zajednice farmera među svim članicama EU. U sektoru govedine ta je politika u osnovi bila usmjerena na osiguranje samodostatnosti podupirući proizvodnju zaštitom granice, cijenom i stabilnošću prihoda te isplatom farmerima prema broju životinja. Godinama se CAP sve više usmjeravao na sigurnost i kakvoću proizvoda ulijevajući farmerima više povjerenja u buduće prihode te na poticanje okolišno održive prakse na farmama.

Reforma CAP-a 2003. i sektor govedine

Od svog osnutka 1962. godine CAP je doživio brojne promjene, prilagođavajući svoje ciljeve i instrumente promjenama europskih i globalnih uvjeta. Prva veća reforma CAP-a izvršena je 1992. u vezi s cijenama i pružanjem izravne pomoći farmerima, seoskom razvoju i mjerama zaštite okoliša te pitanjima tržišta. Druga veća reforma slijedila je 1999. u okviru "Agenđe 2000" i bavila se pitanjima kao što su tržišna orijentacija i konkurentnost poljoprivrednih proizvoda, dodatna briga za okoliš, politika šireg razvoja sela, pojednostavljenje zakonodavstva te sigurnost i kakvoća hrane. Najnovija reforma CAP-a 2003. temelji se na potrebi dalje prilagodbe poljoprivrede EU tekućem razvoju u globalnom okolišu i u strukturi same EU. Novi izazovi uključuju porast brige javnosti za sigurnost hrane, očuvanje okoliša, prihode farma i održiv razvoj u kontekstu sve šire Europske unije i uvijek zahtjevnog međunarodnog trgovinskog okruženja.

Najnovija reforma Zajedničke poljoprivredne politike, izglasana u lipnju 2003. uvela je Program pojedinačne isplate (SPS) sustav godišnje pomoći proizvođačima bez obzira na proizvodnju ("odvojeno"). SPS spaja izvjestan broj postojećih izravnih isplata farmerima kao pojedinačna isplata određena na temelju isplata u odnosnom razdoblju. Sporazum iz lipnja 2003. odredio je maksimalnu svotu koju svaka država može iskoristiti za plaćanje izravne pomoći - poznate kao nacionalna gornja granica (plafon) - na temelju ukupne izravne pomoći plaćene kroz odnosno razdoblje u svakoj Državi članici. Gornje granice su utvrđene u okviru ukupnih nacionalnih gornjih granica za svaki od glavnih proizvoda za koji je pomoć isplaćena u prošlosti.

Države članice mogu izabrati uvođenje SPS-a u potpunosti, spojivši svu pomoć u jednu isplatu ili odlučiti zadržati dio izravne pomoći farmerima u njihovom postojećem obliku ("djelomično odvajanje"), uglavnom tamo gdje vjeruju da može doći do poremećaja na poljoprivrednom tržištu ili napuštanja proizvodnje kao rezultat prelaska na SPS.

Isplate proizvođačima u novim članicama EU obavljat će se u fazama kroz razdoblje od 10 godina počevši od 2004. ali će se pretvoriti u jednokratne isplate farmerima (SFP) u 2005. godini, na razini od 50 posto u EU-15. Njihovi SFP-i temeljit će se na njihovoj prosječnoj površini i prinosu između 1995. i 1999. U tom razdoblju prinos u 10 novih država članica bio je oko pola razine u EU-15; rezultat toga bit će niži SFP za nove članice EU-15.

Prema toj reformi isplate za govedinu su zato ili uključene u SPS ili se mogu isplatiti djelomično odvojeno na sljedeći način:

Države članice mogu zadržati do 100% "premije za dojne krave" i do 40% "klaoničke premije za odrasla goveda" zajedno. Kao alternativa, mogu zadržati 100% klaoničke premije za odrasla goveda zajedno ili umjesto toga do 75% "posebne premije za mužjake". I konačno, Države članice mogu zadržati do 100% iznosa "klaoničke premije za telad" kao isplatu za specifičan proizvod.

Stope premija za goveda (prije primjene djelomično odvojenih postotaka) bile su:

Premija	Stopa	Reforma CAP
Dojne krave	€ 200/životinja	Ostaje 100% vezano u Belgiji, Španjolskoj, Francuskoj, Austriji i Portugalu
Klaonička	€ 80/životinja	Ostaje 40% vezano u Španjolskoj, Francuskoj, Austriji, Portugalu, a 100% u Nizozemskoj
Klaonička za telad	€ 50/životinja	Ostaje 100% vezano u Belgiji (zona sjever), Španjolskoj, Francuskoj, Nizozemskoj, Austriji, Portugalu
Posebna premija za mužjake	€ 150 ili € 210/životinja (ovisno o vrsti)	Ostaje 75% vezano u Danskoj, Finskoj i 74,55% u Švedskoj

Isplate za proširenje (trenutno se kreću od 40 do 100 EUR-a po životinji prema gustoći/veličini po izboru Države članice), dodatne isplate i premije za desezonalizaciju bit će potpuno odvojene.

Tamo gdje Države članice odluče zadržati isplate za specifične proizvode, ograničenja na te isplate odnose se - preko nacionalnih gornjih granica na iznose dostupne pomoći i ograničenja na broj životinja, koje mogu generirati isplate pomoći. Postoje također individualne gornje granice (plafoni) prema broju prava na premiju dodijeljenu svakom farmeru kao premija za dojnu kravu.

Program pojedinačne isplate stupio je na snagu 1. siječnja 2005. Države članice mogu odlučiti zatražiti SPS nakon razdoblja tranzicije (do 31. prosinca 2005. ili 31. prosinca 2006.), gdje to opravdavaju posebni poljoprivredni uvjeti. Tamo gdje je prihvaćena tranzicijska opcija Države članice moraju primijeniti pravila iz 2004. u vezi sa stokom i isplatama — npr. ograničenja na broj stoke po hektaru zemlje pod krmom (gustoća stoke) - i isplate za proširenje.

Za vrijeme razdoblja tranzicije, Države članice moraju godišnje dodatno izdvajati za isplate farmerima koji drže stoku da se osigura jednako tretiranje farmera i izbjegnu tržišne i konkurentske nepravilnosti. Države članice mogu također dodijeliti "premiju desezonalizacije" (stopa varira između 18,11 i 72,45 EUR-a po životinji, ovisno o datumu klanja) u svrhu poticanja klanja stoke u razdoblju nenapasanja.

Javne zalihe govedine igraju ulogu u podupiranju tržišta govedine. EU sada kupuje govedinu za "interventne" zalihe samo kad prosječne tržišne cijene u Državi članici ili regiji Države članice padnu ispod EUR 1 560/toni kroz dva uzastopna tjedna. Postoji i sustav pomoći privatnim zalihama (PSA) čime se potiču privatni trgovci da pomoću djelomičnog poticaja povremeno spreme govedinu kad postoje viškovi. Intervencija se tako sada smatra "sigurnosnom mrežom", pomažući povremeno ograničeno tržište, prije nego sredstvom upravljanja tržištem, pa je PSA prihvatljiv izbor za postupanje s povremenim viškom.

Države članice mogu odobriti "dodatne isplate" za podršku poljoprivrednim aktivnostima, važnima za zaštitu ili poboljšanje okoliša ili kakvoće i prodaje poljoprivrednih proizvoda uključujući i stočni sektor. Ove "dodatne isplate" mogu iskoristiti do 10% dostupnih sredstava za određeni sektor uključen u program jednokratne isplate u odnosnoj Državi članici. Ove dodatne isplate moraju biti unutar ukupne gornje granice određene za taj sektor.

- Nacionalna/regionalna fleksibilnost

Države članice imaju razne opcije za izračunavanje i obavljanje isplata: SPS mogu izračunati na osnovi izravnih isplata pojedinim farmerima u prošlom referentnom razdoblju ili na osnovi prosjeka svih ranijih isplata, jednakih u državi ili regiji. Države članice mogu primijeniti mješovitu standardnu/ravnu stopu koja ostaje ista ("statična") ili mogu izabrati mješavinu koja se s vremenom mijenja ("dinamična"), obično tako da se omjer SPS-a što se temelji na povijesnim referencama smanjuje s povećanjem elementa ravne stope pružajući sredstvo prelaska iz osnovne u ravnu stopu.

U prvim godinama nakon pristupanja nove članice mogu se odlučiti za drugačiju vrstu programa izravne pomoći - "Program isplata u pojedinom području" - Međutim, primijene li SPS onda vrijedi isto pravilo kao drugdje u EU (koristeći faze u stopama prema dogovoru u pristupnim sporazumima).

- Opće udovoljavanje i dobro postupanje s okolišem

Farmeri moraju održavati svoju zemlju u dobrom poljoprivrednom i okolišnom stanju i poštivati stroge standarde "općeg udovoljavanja" da bi dobili SPS i druge izravne isplate. Države članice određuju minimalne zahtjeve za dobro poljoprivredno i okolišno stanje. Postoje i drugi zahtjevi statutarnog upravljanja ustanovljeni u skladu s 19 Direktiva i propisa u vezi sa zaštitom okoliša, uključujući zdravlje životinja i njihovu dobrobit. Proizvođači stoke moraju ovim pravilima ako žele dobiti izravne isplate (SPS i/ili djelomično vezane isplate).

- Održavanje stalnih pašnjaka

Države članice moraju osigurati da se područje stalne paše ne smanji kao rezultat reforme. U slučaju da se područje stalne paše znatno smanji odnosna Država članica može uvesti mjere na razini farme da prisili farmere da održavaju stalne pašnjake na svojim gospodarstvima.

Izgledi sektora govedine nakon reformi

Glavna uprava za poljoprivredu i seoski razvoj Europske komisije izdala je pregled tržišnih trendova i srednjoročne planove ponude i potražnje glavnih poljoprivrednih proizvoda i vjerojatnog razvoja poljoprivrednog tržišta do

2012. na temelju izvjesnih pretpostavki i statističkih podataka dostupnih u svibnju 2005.

Srednjoročni planovi prihoda izgledaju prilično povoljno: Poljoprivredni prihodi EU-25 porast će za 11,7% između 2004. i 2012. u stvarnom smislu i po radnoj jedinici (4% rast u starim i 60,4% u novim Državama članicama).

Očekuje se da će stalna potražnja i oskudna ponuda rezultirati čvrstim cijenama u planiranom razdoblju, privlačeći veći uvoz pod punom carinom, osobito vrlo kvalitetnih goveđih odrezaka iz Južne Amerike. Očekuje se da će ukupni uvoz doseći 0,6 milijuna tona do kraja planiranog razdoblja. Dodatni EU-25 izvoz bit će sve više ograničen slabom domaćom ponudom, a slabija konkurentnost i manji izvoz nastavit će, prema predviđanjima, trend opadanja do gotovo 100 000 tona do 2012. Očekuje se da će ostati tako cijelo planirano razdoblje jer će se proizvodnja smanjiti do oko 7,6 milijuni tona do 2012. u skladu sa smanjenjem strukture mliječnih stada i djelovanjem uvođenja jednokratne isplate farmama. Niska domaća nonuda i čvrsta potražnja predviđa se da će držati cijene govedine relativno visoke te privlačiti više uvoza pod punom carinom, osobito iz Južne Amerike.

- Djelovanje reforme CAP-a na razini farme

Uvođenje SPS-a otvorit će šire mogućnosti farmerima za izbor vrste proizvoda prema potražnji na tržištu i mogućnosti svojih farma. U nekim slučajevima to će zahtijevati nove investicije i/ili promjenu proizvodnje. Mnogi su istraživači privukli pozornost na činjenicu da se odluke o investiranju donose jedanput ili dvaput u životu i da one također ovise o dobi donositelja odluke. Usprkos toj i drugim poteškoćama u vezi s novim investiranjima neke će se farme rekonstruirati i promijeniti svoju proizvodnu orijentaciju, neke će prestati raditi zbog starenja poljoprivredne populacije ili zbog niske profitabilnosti. Velika većina farma nastavit će raditi. Među njima mnoge će se proširiti radi poboljšanja na ljestvici ekonomičnosti i produktivnosti.

- Srednjoročni pregled i nadziranje djelovanja reforme

Europska će Komisija obaviti srednjoročni pregled 2008. kako bi analizirala djelovanje ove politike na revidiranu Zajedničku poljoprivrednu politiku i predložiti potrebne ispravke i promjene, ako je potrebno. Provođenje revidirane politike pratit će na farmi na regionalnim i nacionalnim razinama stručnjaci i istraživačke ustanove, državna administracija i udruženja farmera.

EAAP: ponuđene službe sektoru govedine EU

- Uloga radne skupine za govedinu EAAP-a

U lipnju 2005. Vijeće EAAP-a osnovalo je Radnu skupinu za govedinu (BTF) u okviru Radne skupine mreže goveda, da prati razvoj događaja u sektoru govedine u Europi, da ustanovi potrebe istraživanja i prioritete u razvijanju mehanizama i metoda za analizu djelovanja politike i za praćenje i analizu strategija farma. Sastoji se od stručnjaka i istraživača iz Država članica EU koje predstavljaju nekih 80% proizvodnje govedine u Europskoj uniji. BTF je prihvatila metode određivanja standardnih postupaka za praćenje i analiziranje ekonomske djelotvornosti rada govedarskih farma. Osim uloge u analiziranju politika Skupina će također služiti kao forum za izmjenjivanje informacija i iskustava te kao tijelo za razvoj i koordiniranje istraživačkih projekata koje financira zajednica u okviru svog mandata i stručnosti. Njihovi nalazi i preporuke proslijedit će se Vijeću EAAP-a, Organizacijama članicama te nacionalnom i predstavniku EU udruga farmera.

- Uloga i budući koraci EAAP-a

EAAP kao jedinstvena organizacija, sastavljena od nacionalnih predstavničkih tijela uključujući istraživanje i znanost o životinjama, administraciju i industriju životinja najbolje odgovara za pružanje usluga ove vrste svojim članovima, osobito u pogledu činjenice da od 38 članica nacionalnih organizacija, 23 su iz Država članica i četiri iz zemalja kandidata za EU.

Kroz programe i aktivnosti svojih tehničkih tijela (Komisija za proučavanje goveda i sustava farma za proizvodnju životinja, Radna skupina mreže goveda i Radna skupina za govedinu) dat će podršku nacionalnim nastojanjima u praćenju i analiziranju djelovanja SPS-a na razne sustave proizvodnje, razvoju događaja u proizvodnji i potrošnji govedine u Europi i djelovanju globalnih trendova na stanje u Europi.

Programi istraživanja članova EAAP-a također uključuju genetičku prehranu, upravljanje farmom i zdravlje kao znanstvena disciplina s izravnim djelovanjem na djelotvornost sektora govedine. Godišnji sastanci u EAAP—u su mjesto za izmjenjivanje informacija o rezultatima i postignućima na području istraživanja životinja. Sastanci studijskih komisija i radnih skupina kao i brojni simpoziji bave se specifičnim problemima u vezi s proizvodnjom životinja, kakvoćom i sigurnošću životinjskih proizvoda te tehničkom i ekonomskom djelotvornošcu industrije životinja. Rezultati istraživanja objavljuju se u znanstvenim i tehničkim izdanjima EAAP-a.

Predstojeći simpoziji koji će se organizirati za vrijeme sastanaka EAAP-a 2006. (Antalyi, Turska) i 2007. (Dublin, Irska) bavit će se proizvodnjom goveda u istočnom dijelu Europe te djelovanjem reforme CAP-a na proizvodnju govedine. Drugi simpozij će također raspravljati o izvještajima Radne skupine za govedinu o djelovanju uvodjenja SPS-a u sektor govedine.

Cattle Network website (www.cattlenetwork.net): sadrži informacije o ključnim temama i događajima na području industrije goveda, uključujući politiku EU, tržište, cijene, usavršavanje i prilike za zaposlenje, nove publikacije, sajmove i aktivnosti stručnih organizacija i udruženja proizvođača i uzgajivača goveda.

Primljeno: 21. 4. 2006.