FranceAgriMer : National board for Agriculture and Fisheries

Public establishment under supervision of the Ministry of Finances and the Ministry of Agriculture

Support “France Génétique Elevage” and sponsor of ICAR 2011 meeting :

► Interest towards international market
► Stakes for exports and international cooperation
► Economic importance : factor of development for bovine genetic sector
► Opportunity to share high level expertise
Export turn over by sector

The French agriculture & food sectors turnover in exports 2010

€ 52,6 billion

- €11 billion Alcohols 21%
- €9 billion Grains and milling 18%
- €5 billion Milk and milk products 10%
- €5 billion Fruits, vegetables 9%
- €4 billion Meat Products 7%
- €3 billion Feed + byproducts 6%
- €1.9 billion Wood 4%
- €1.8 billion Sugar 4%
- €1 billion Fishery products 2%
- €1.4 billion Seeds and seedings 3%
- €1 billion Live Animals & Genetics 4%
- €0.9 billion Others 9%

Source: FranceAgriMer d'après Ubifrance
FRANCE – 1st live cattle world exporter

Animals number 2010, estimation Blezat consulting
## Bovine markets

<table>
<thead>
<tr>
<th>Year</th>
<th>World</th>
<th>EU27</th>
<th>3rd countries</th>
<th>% 3rd countries /world</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010 - 1000 €</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Agri&amp;agro</td>
<td>52 670 942</td>
<td>36 005 168</td>
<td>16 665 774</td>
<td>31.5 %</td>
</tr>
<tr>
<td>Total beef cattle</td>
<td>1 731 483</td>
<td>1 551 145</td>
<td>180 338</td>
<td>10%</td>
</tr>
<tr>
<td>Bovine semen</td>
<td>9 836</td>
<td>3 828</td>
<td>6 008</td>
<td>60%</td>
</tr>
<tr>
<td>Breeding cattle</td>
<td>68 477</td>
<td>49 520</td>
<td>18 957</td>
<td>28%</td>
</tr>
<tr>
<td>Fattening cattle</td>
<td>1 003 711</td>
<td>992 936</td>
<td>10 775</td>
<td>1%</td>
</tr>
<tr>
<td>Slaughtering cattle</td>
<td>164 350</td>
<td>103 947</td>
<td>60 403</td>
<td>37%</td>
</tr>
</tbody>
</table>
French Bovine sector exports: semen and live animals

- Turn over export 2010:
  - Embryos: no data – not recorded since 2000
  - Semen: 10 M€ worldwide; 6 M€ to 3rd counties (60%)
  - Breeding cattle: 68 M€; 19 M€ to 3rd counties (30%)
  - Fattening cattle: 1 000 M€; 10 M€ to 3rd counties (10%)
  - Slaughtering cattle: 164 M€; 60 M€ 3rd countries (36%)

- 3rd countries
  - 12 months 2010/2009
    - + 1% in EU (1.3 billion €)
    - X 3 on 3rd countries (96 M€)

- Semen BV
- Breeding 20%
- Slaughtering 63%
- Fattening 11%
- Others 10%

- 3rd countries
  - + 33% en semen (+1.5M€)
  - + 114% en breeding cattle (+10M€; 5300 heads)
  - + 164% en fattening cattle (+44M€; 45000 heads)

- Semen:
  - ++ Iran, Argentina, Equator, South Africa, Turkey, Egypt, Botswana, Colombia, Bangladesh, Thailand, China
  - -- Mexico, Tunisia, Brazil, Australia

- Breeding cattle:
  - ++ Algeria, Morocco, Kuwait, Lebanon
  - -- Tunisia, UE, Suisse

- Fattening and slaughtering cattle:
  - ++ Lebanon, Algeria, Morocco, Tunisia, Suisse
Bovine markets in third countries

* In value FOB

Source: FranceAgriMer d’après Ubifrance
### Bovine markets

<table>
<thead>
<tr>
<th>Category</th>
<th>1st quarter 2011/2010</th>
<th>1st quarter 3rd countries</th>
<th>% 3rd countries / world</th>
<th>% 2011/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Agri&amp;agro</td>
<td>4 847 485</td>
<td>100%</td>
<td></td>
<td>+38%</td>
</tr>
<tr>
<td>Total beef cattle</td>
<td>54 292</td>
<td>13%</td>
<td></td>
<td>+45%</td>
</tr>
<tr>
<td>Bovine semen</td>
<td>2 013</td>
<td>62%</td>
<td></td>
<td>+27%</td>
</tr>
<tr>
<td>Breeding cattle</td>
<td>9 150</td>
<td>46%</td>
<td></td>
<td>+152%</td>
</tr>
<tr>
<td>Feeding cattle</td>
<td>3 352</td>
<td>1%</td>
<td></td>
<td>+29%</td>
</tr>
<tr>
<td>Slaughtering cattle</td>
<td>20 496</td>
<td>41%</td>
<td></td>
<td>+70%</td>
</tr>
</tbody>
</table>
The significance of sanitary barriers for trade

The 3 / 4 of products traded in the world...

... and nearly half of those exported by France in 2010...

... are sensitive or very sensitive from the sanitary point of view

Source: DGAL- General directorate for food
Our missions for exports

Facilitate access to international markets and facilitate Sanitary and Phytosanitary (SPS) negotiations

Assure the interaction between Ministry of Agriculture / Exporters for daily assistance in exports

Provide information and consultancy for the exporters: Exp@don sanitary database / technical groups / SPS export committees ...

Logistical and financial support: auditing missions, missions abroad

Promotion of the French food safety system and exporting sectors such as genetics

Prioritization of the negotiation issues with the sectors: matching of products and countries
# Prioritization of SPS negotiations with the business sectors

## Preparation of FranceAgriMer export committees

<table>
<thead>
<tr>
<th>FranceAgriMer</th>
<th>Ministry of Agriculture</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Collect of business sectors claims</td>
<td>1. EU Priorities</td>
</tr>
<tr>
<td>2. Economical analysis</td>
<td>2. Workforce (staff, time) evaluation</td>
</tr>
<tr>
<td>3. Prioritization by economical interest</td>
<td>3. Evaluation of Faisability vs Difficulty of negotiaion</td>
</tr>
</tbody>
</table>

## FranceAgriMer export SPS Committees: talks

- Seeds and seedings
- Vegetal products
- Animal genetics
- Animal products
- Feed By-Products

## Definition of an action plan for 2011

<table>
<thead>
<tr>
<th>Ministry of Agriculture</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Analysis of the conclusions of the 5 sections</td>
</tr>
<tr>
<td>2. Consulting of the Agriculture attachés and Trade services in French embassies</td>
</tr>
</tbody>
</table>
Priority SPS negotiations according to business sectors

- Plant genetic
- Plant products
- Animal genetic
- Animal products
- Feed & byproducts

Nbr of files - High priority
Nbr of files - Middle priority

- Plant genetic
- Plant products
- Animal genetic
- Animal products
- Feed & byproducts

ÉTABLISSEMENT NATIONAL DES PRODUITS DE L'AGRICULTURE ET DE LA MER
**EXP@DON**: The sanitary database dedicated to exports: health certificates

### Conditions sanitaires et phytosanitaires pour exportations pays tiers

<table>
<thead>
<tr>
<th>Statut/Date moyen</th>
<th>Pays</th>
<th>Produit-usage</th>
<th>Code produit</th>
<th>Certificat(s) sanitaire(s)</th>
<th>Fermeture technique</th>
<th>Date de mise à jour du certificat</th>
</tr>
</thead>
<tbody>
<tr>
<td>15/02/2007</td>
<td>RUSSIE</td>
<td><strong>Vétérinaire/dennées animales et produits d’origine animale/Lait et produits laitiers</strong></td>
<td>RUPLIA07</td>
<td>RUPLIA07</td>
<td>16/02/2007</td>
<td></td>
</tr>
</tbody>
</table>

Opened since

Approved health certificate

Operators must be aware that there are several models of certificates:

- **Official negocié (logotype vert)**, validated by an agreement between the French administration and the authorities of the importing country, it is non-modifiable by the DDSV and SPAL signatories.
- **Official non negocié (logotype violet)**, certificate issued in accordance with the regulations and the official requirements of the country concerned.
- **A titre de renseignement (logotype jaune)**, non official and non-modifiable by the operators concerned, under their responsibility.

Les différents statuts sanitaires et phytosanitaires sont définis par les logos suivants:
- 🟠 : Ouvrir.
- 🟡 : Fermé.
- 🟢 : Indétectable.
Combining negotiation / influence / promotion