IFCN
Beef Report 2004




For a better Understanding
of Beef Farming World-Wide

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Participants in the IFCN Beef Conference 2004

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Note: Data and information for Namibia have been provided by the IFCN Centre Braunschweig.

* *In references to the Beef Report please cite: Deblitz et al. (2004): IFCN Beef Report 2004. IFCN, IFCN Beef and Sheep Management, Braunschweig.*

** *In references to special studies and country reports please cite (for example): Izquierdo, L. (2004): Comparison of identical farms 2003 vs. 2002. In: Deblitz et al. (2004): IFCN Beef Report 2004. IFCN, IFCN Beef and Sheep Management, Braunschweig, p 90-91.*

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2.2 Overview of the farms

A total number of 29 farms were analysed for beef finishing. Nine farms had a combination of weaner production from their own cow-calf enterprise and finishing of the male calves in their finishing enterprise. These farms participate in both the comparison of beef finishing in this chapter and cow-calf in Chapter 3. With the exception of the Spanish farm ES-950, all farms produce male animals (bulls or steers) which are in the focus of the following comparison.

The farm names are defined by using the total number of cattle sold per year. To improve readability when addressing single farms, the cattle numbers in the farm names were rounded to the next reasonable figure. The exact numbers of cows kept and cattle sold are provided in the tables of this Chapter and Chapter 2.4.

Cattle for finishing may come from the dairy herd or from the beef herd (cow-calf). The countries analysed can be grouped by the percentage of the beef herd in the total cattle herd, a situation which is reflected in the typical farms:

- **'Milk countries'** with the beef herd as < 25 percent of the total are Poland, Pakistan, Hungary, Czech Republic and Germany.
- **'Mix countries'** with a share between 25 and 75 percent of the beef herd of the total are Austria, France, Ireland and Spain.
- **'Beef countries'** with > 75 percent of the beef herd of the total are U.S., Brazil, Australia, Argentina and Uruguay.

The farms are located in **main production areas** for the products considered. Most farms are located either on plains or high plains. Exceptions are the Austrian AT-7 (hill region in the Alps), the French cow-calf farm FR-75 in the Limousin (edge of Massif Central) and the U.S. cow-calf farms US-240 in New Mexico and US-500 in Montana (rolling hills)

The prevailing **breeds** in Western Europe, Poland and Czech Republic are Holstein breeds and their crosses, Fleckvieh (Simmental) and the French beef breeds Limousin and Charolais. In Hungary, Ireland, the U.S. and the Southern Hemisphere, breeds of British origin (mainly Hereford, Angus and their crosses) dominate. Particular cases are Brazil (Nelore, coming from India) and Pakistan where the local buffalo breed is used for both milk and beef production.

There are two **specialised** farms producing finished animals with the purchase of calves from outside of the farm. All other farms **combine the beef finishing** with cow-calf, arable crops, dairy or other enterprises. Finishing farms with dairy or cow-calf enterprises use their own calves for finishing, some of them buy additional calves or stores/backgrounders from outside the farm.

The Spanish ES-6950 is a special case. Unlike the U.S.-feedlot, the cattle are not produced on a single production site but in a various number of farms under the roof of a single integrator. This integrator buys animals from all over Europe and Spain and sends them to the farmers for finishing that takes place in units of between 100 to a few hundred animals. The integrator remains the owner of the cattle and provides all feed, medical and veterinary services, and transport. He also covers all other costs and organises the sale of the animals. The farmers only provide buildings and labour. Thus, the system is characterised by a rather high level of integration and provides an interesting example for a possible future design of beef finishing. More details on this farm can be found in the special study in Chapter 6.4.

Explanation of variables

Calf: *Young animal of dairy origin between seven and 120 days of age.*
Weaner (calf): *Young animal of between five and nine months coming from the cow-calf enterprise and being reared by a suckler (beef) cow until weaning. In the Report the expression 'weaner' is used to indicate a difference to calves from dairy herds, referred to as 'dairy calves'.*
Backgrounder/Store/Feeder: *Animal older than nine months beyond the calf / weaner stage entering a final finishing phase which had an initial feeding phase after weaning.*

Overview of typical farms

Name Beef finishing (1)	Name Cow-calf (2)	Region	Location	No. & category of animals sold p.a.	Breeds	Origin finishing cattle dairy cow-calf (3)	Origin finishing cattle own purchase (4)	Other activities (5)
AT-7	**AT-15**	Styria	Hill	7 steers	Lim x Fleck	cc	o	Forestry
AT-30	–	Niederösterreich	Plain	30 bulls	Fleckvieh	d	p	Crops
DE-190	–	Bavaria	Plain	120 bulls 70 Feeder	Fleckvieh	d	p	Crops
DE-240	–	Bavaria	Plain	240 bulls	Fleckvieh	d	p	Crops/Forestry
DE-280	–	Northrhine-Westphalia	Plain	280 bulls	Fleckvieh	d	p	Crops
DE-360	**DE-600**	Mecklenburg Western-Pomerania	Plain	282 bulls 80 steers 130 fem. weaner	Fleckvieh X / Holstein	cc/d	o/p	Crops
FR-45	**FR-65**	Pays de la Loire	Plain	31 bulls 16 cows 2 breed. heifers	Charolais	cc	o	Crops
FR-90A	–	Brittany	Plain	90 bulls	Char / Lim	cc	p	Crops
FR-90B	–	Brittany	Plain	90 bulls	Char x Dairy / Normands	d	p	Crops/Poultry
ES-950	–	Catalunya	Plain	950 heifers	Crossbreeds	cc/d	p	–
ES-6950	–	Aragón	Plain	3,808 bulls 3,128 heifers	Crossbreeds	d/cc	p	–
IE-75	–	Connaught	Plain	75 steers	Continental X	cc	p	–
CZ-160	–	North-east Bohemia	Plain	160 bulls	Holstein	d	o	Crops/Dairy/Hogs & Sows
CZ-780	–	North-east Bohemia	Plain	780 bulls	Holstein	d	o/p	Crops/Dairy/Hogs & Sows
HU-80	**HU-200**	South Transdanubia	Plain	80 bulls 61 breed. heif.	Hereford	cc	o	–
HU-440	–	Central Transdanubia	Plain	440 bulls	Holstein	d	o/p	Crops/Dairy
PL-12	–	Wielkopolskie	Plain	7 bulls 5 heifers	Black-white	d	o/p	Crops/Dairy
PL-30	–	Podlaskie	Plain	20 bulls 9 heifers	Black-white	d	o	Crops/Dairy
US-7200	–	Plains	Plain	7,195 steers	British x Continent.	cc	p	–
AR-1300	–	Buenos Aires	Plain	1,300 steers	Angus/Heref./Zebu	cc	p	Crops
AR-2700	–	Buenos Aires	Plain	2,061 steers 648 heifers	Angus	cc	p	Cow-Calf (breeding) Crops
AR-1000	**AR-1120**	Buenos Aires	Plain	1,000 steers 181 breed. heif.	Angus/Hereford	cc	o/p	–
BR-180	**BR-500**	Mato Grosso do Sul	Savannah	180 steers 94 breed. heif.	Nelore	cc	o	Legal Reserve
BR-500	**BR-1400**	Mato Grosso do Sul	Savannah	500 steers 265 breed. heif.	Nelore	cc	o	Legal Reserve
UY-880	–	Litoral Centro	Plain	880 steers	Hereford X	cc	p	Crops
AU-1100	**AU-1080**	New South Wales	Plain	922 steers 184 heifers 79 breed. heif.	Angus X	cc	o/p	Crops
NA-125	**NA-180**	Omaheke	Plain	80 steers 44 heifers 16 breed. heif.	Brahman x Fleck	cc	o	–
PK-3	–	Layyah, Punjab	Plain	3 bulls	Nilli Ravi (Buffalo)	d	o	Dairy
PK-50	–	Faisalabad, Punjab	Plain	50 bulls	Nilli Ravi (Buffalo)	d	p	Crops

(1) Number refers to total finished cattle sold per year
(2) Number refers to average beef cow number per year
(3) d= dairy; cc= cow-calf
(4) p= purchase; o= own
(5) Legal Reserve in Brazil: 20% of the farm area may not be used, must be dedicated to existing natural vegetation or replanted with native species.

2.6 Total cost by cost items

Like prices, cost went up when comparing the years 2003 with 2002 due to the valuation of most national currencies against the US$. Unlike in 2002, when production cost in Argentina were less than US$ 100 per 100 kg CW, in 2003 none of the farms analysed managed to produce beef for less than US$ 100. At the same time, the cost of the Western European countries jumped up approximately US$ 80 per 100 kg CW compared to last year. The production costs in Western Europe are still 3.5 to four times higher than the cost of the low-cost producers in South America and Pakistan.

The **total cost** can be grouped as follows:

- **Very high > US$ 400 per 100 kg CW** for the farms in Austria, Germany and France with an extreme of US$ 700 for the Austrian hill farm AT-7
- **High US$ 300–400** for the Irish and the Spanish farms and the small Hungarian farm
- **Medium US$ 200–300** for the Czech farms, the large Hungarian farm, the Polish farms, the Brazilian, Australian and Namibian farms
- **Low US$ 100–150** for the farms in Argentina, Uruguay and Pakistan

There are some unexpected differences with regard to farm sizes:

- DE-360 has higher costs than smaller farms due to the production of steers (lower productivity).
- ES-6950: The profit of the contract farmer is included in the cost for means of production, thus overestimating costs compared with the other farms
- AR-1000 has lower costs than the larger Argentinian farms. The main reason is lower land costs due to the location of the farm at the edge of the Humid Pampa where crop production is not profitable and therefore land rents are lower. Another reason is that this farm is opting for organic production, resulting in lower costs because pharmaceutical products and concentrates are not used.

Costs for **means of production including depreciation** is by far the most important cost group, lying between 60 and 98 percent. Animal purchases have a share of between 30 and 75 percent in the cost for means of production. Exceptions are the small Czech farm (using dairy calves from the own farm whereas the larger farm additionally buys weaner calves from outside the farm) and Poland with relatively low calf prices and rather young calves at the start. High shares of 60 percent and more are found in the Irish, the small Hungarian, the U.S. and the small Argentinian farm. All these farms buy weaner calves or backgrounders calves at relatively high prices and/or rather old calves.

Labour costs include hired labour (excluding contract work) and opportunity costs for family labour. Extremes are less than five percent in the U.S.-feedlot, the Spanish ES-950 and the large Argentinian farm on one side and 28 percent in AT-7 on the other side. The labour cost of ES-6950 are not stated here but included in the cost for means of production. From the integrator's point of view they are part of the 'hotel costs' consisting of building cost and labour cost plus a profit of the contract farmer. With more than 10 percent of total costs, labour costs are particularly important in most farms in Austria, Germany, France, Ireland, Czech Republic, Poland, Namibia and Pakistan.

Land costs are land rents paid plus opportunity costs for own land. Please note that for the following farms no results on land are presented as land can not be considered a production factor here: ES-950, ES-6950, US-7200 (all buy their feed exclusively from outside the farm). Extremes are 0.1 percent in Namibia and 32 percent in Brazil. A relatively high share of more than ten percent in total cost can be found for the larger Polish farm (high land prices due to competition with dairy), in Argentina (cost of land), Uruguay and Australia (low productivity).

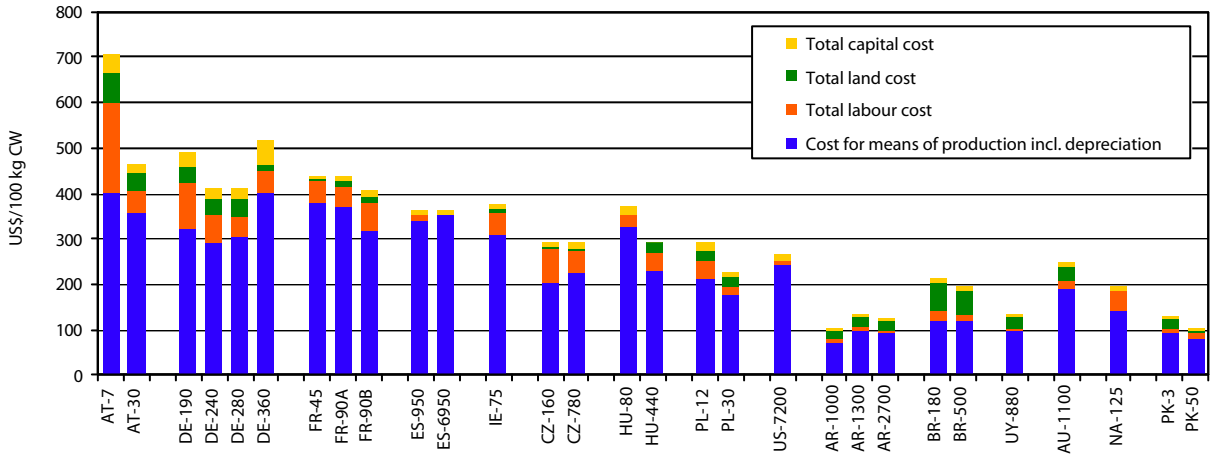
Capital costs are interest paid for liabilities and opportunity costs for own capital They are the least important cost component. As less than ten percent of total cost, they are relatively low in all countries.

Low cost countries would have an incentive to export beef to countries with higher price levels. Provided that a) the beef products can be substituted between countries and b) trade barriers wouldn't exist. This is most likely the case for the South American countries.

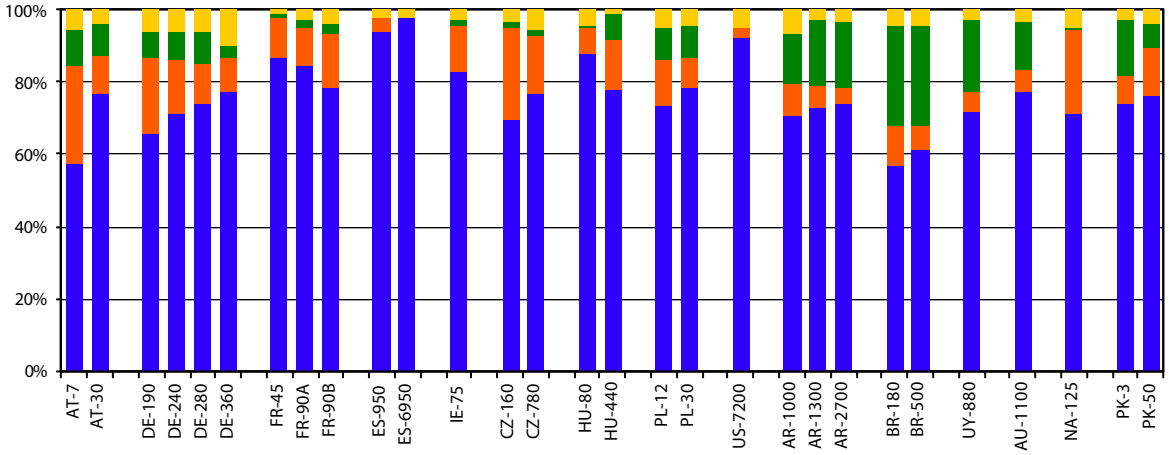
Explanation of variables

Cost of the beef enterprise: *All costs of the beef enterprise. The beef enterprise as a part of the whole farm includes all beef cattle and the fodder production for all these animals.*
Cost for means of production plus depreciation: *All cash costs like animal purchases, fuel, fertiliser, concentrate, insurance, maintenance plus non-cash costs like depreciation for machinery and buildings (excl. VAT).*
Labour cost: *Cost for hired labour + opportunity cost for family labour.*
Land cost: *Land rents paid + calculated land rents for owned land.*
Capital cost: *Non-land assets * interest rate (equity * 3 percent, liabilities * interest rate paid).*

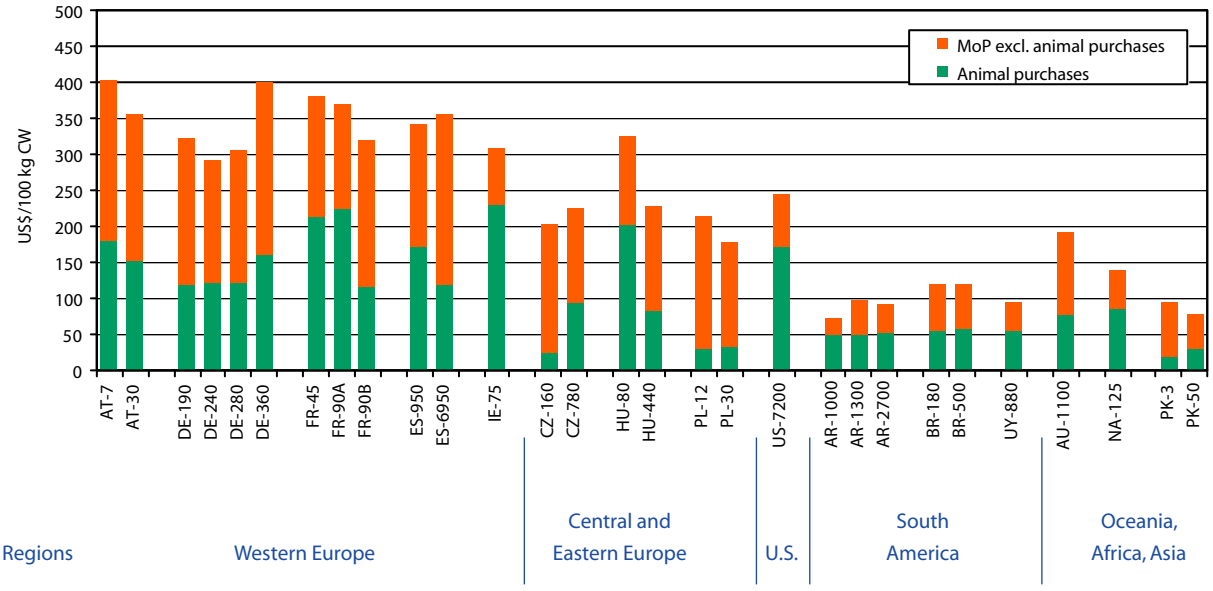
Total cost by cost items



Total cost composition by cost items in percent (Legend see above)



Composition of cost for means of production (animal purchases and other)



3.4 Physical indicators of the production system

Replacement rates range from six percent in HU-100 to 28 percent in the Charolais farm FR-65 (producing cull cows for the national beef market).

The **age at first calving** ranges from 24 months to 36 months. The Hungarian farms, the U.S.-ranches, the Argentinian and the Australian farms calve their heifers between 24-26 months of age. All use Hereford/Angus beef cows. Early calving is also typical in the East German farms using Simmental crosses. Particularly late calving is observed in Brazil. Reasons are the use of Nelore pure-bred cows with characteristic late calving and the low nutritional level of the cows.

Calf losses range between two percent in the U.S.-ranches to 8-11 percent in the East German farms. The low losses in the U.S.-ranches are due to calving in corrals, minimizing the death loss from exposure to the elements, predation, or other factors that close human observation tend to mitigate. The calf loss of 8 percent in the French FR-64 is caused by the high replacement rate, resulting in a high percentage of first calvers which is correlated with higher calf losses. In the German farms, the high losses are due to the existence of open ditch draining systems into which the calves can fall.

Weaned calves per 100 cows and year is the key (re-)productivity indicator of the cow-calf enterprise, actually showing the sum of a number of indicators like conception rate, calving rate and mortality. Some of the indicators are influenced by the breed used, but the highest impact comes from management. The farms can be grouped as follows:

- **High > 90 percent** in the farms from Austria, Germany, France, HU-100 and US-500
- **Medium 80–90 percent** in Ireland, HU-200, US-240, Australia and Namibia
- **Low 70–80 percent** in Argentina and Brazil (Nelore)

Most **weaning ages** vary between 200 and 250 days. Exceptions with only 180 days are DE-600 and AR-1120 (animals are weaned early and sent to own finishing enterprise) and FR-75 with 275 days. The main reason is the traditional spring calving extending the rearing period to late autuum. **Weaning weights** depend on the breed, the age, the sex and the nutrition level of the animals. Most of them are between 200 and 300 kg LW. Particularly low levels are displayed by Argentina (early weaning) and Brazil (breed, nutrition).

Total live weight sold

Since cow-calf farms do not have just one single output, it is difficult to define a comparable and homogeneous physical output figure as a reference unit for the cost, returns and profitability analysis in the following chapters. Usually costs are stated on a per cow basis, but the cow actually is an input of the cow-calf enterprise and forms the productive basis. On the other hand, weaner calves are the main aim of cow-calf production but not the only output.

As a compromise, **total output of live weight per cow and year** was calculated to obtain an idea about the overall productivity of the cow-calf enterprise. Total live weight sold is determined by herd size, replacement rate and number of calves weaned per year. Total live weight sold per year was also taken as a reference unit for the economic analysis.

The chart shows that most farms produce between 200 and 400 kg live weight per cow. Extremes are the HU-100 and the French farms that typically finish adult cattle (cows and heifers) on a cereal/concentrate-basis for a period of about 100–120 days on their own site. When looking into the categories of animals produced, there are some differences between the farms:

- All farms produce cull animals and weaner calves.
- Farms with more than 50 percent of weaner production in total live weight are the AT-15, the East German farms (with subsequent beef finishing on their own site), FR-75, the Irish farm, the small Hungarian farm and the U.S. ranches.
- Farms which typically finish **adult** cattle on their own site are the French farms (cows and heifers) but also the Australian and the Namibian farm where heifers are finished. In France there is a particular market for cull cow meat.
- The rest of the farms have a mix of slaughter animals, breeding and weaners.
- Most of the farms raise their own replacement heifers and sell surplus heifers as breeding cattle. Exceptions are: the Austrian farms, selling all female calves as weaners or baby-beef and buying the replacement heifers externally; the German farms and the French farm in the Limousin (selling female weaners for further beef production).

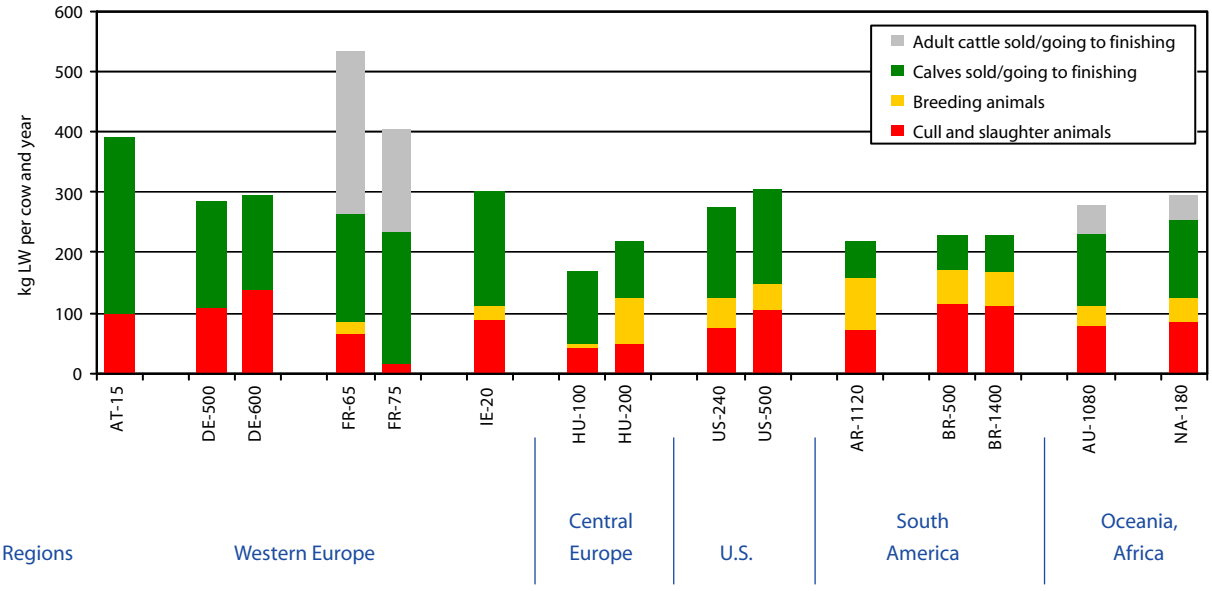
Explanation of variables

Total live weight sold: *Sum of the weight of cull animals (cows, bulls, surplus heifers), breeding animals (surplus heifers), weaner calves and adult animals sold or transferred to the beef finishing enterprise.*

Physical indicators of the production system

Farm name	No. of cows	Replacement rate (%)	Age at first calving (months)	Calf losses (%)	Weaned calves per 100 cows and year	Weaning weight (kg)	Weaning age (days)
AT-15	15	13	30	6	93	298 - 320	240
DE-500	500	19	25	11	92	220 - 260	240
DE-600	600	26	25	8	94	190 - 240	180
FR-65	64	28	30	8	98	260 - 310	244
FR-75	74	16	33	4	91	290 - 300	244 - 305
IE-20	20	15	30	5	90	255 - 280	214
HU-100	102	6	24	2	94	228 - 254	205
HU-200	200	10	25	3	82	225	230
US-240	240	14	24	2	89	245 - 249	210
US-500	500	15	24	2	91	236 - 261	210
AR-1120	1123	17	26	6	79	140 - 150	183
BR-500	500	16	36	5	71	150 - 160	240
BR-1400	1400	16	36	5	72	160 - 170	210
AU-1080	1076	18	24	5	89	250 - 270	210
NA-180	182	18	29	3	89	265 - 285	240

Total live weight sold per year



4.6 USA, Australia, South America: Price indices in US$

Please note: Main reasons for national price fluctuations were explained in Chapter 4.3 and are not repeated here. The focus of this chapter is on exchange rates and the resulting US$-prices. For all countries considered here, beef prices are for steers and livestock prices are for (steer) weaner calves coming from cow-calf.

USA and Australia

Like the other currencies, the Australian dollar devaluated against the US$ in the period 1996 to 2001 to approximately two thirds of the 1996-level and recovered in 2002 and 2003 to 83 percent of 1996-levels. The slight revaluation of the AU$ in 2002 could not compensate for the price drop in national currency, resulting in US$ price levels of just above 60 percent of 1996-levels. Price increases as well as further valuation of the AU$ helped to shift Australian beef prices to reach 1996-levels in 2003.

Livestock prices in the U.S. showed a clear upwards trend with prices being around 4o percent higher from 2000 onwards when compared with 1996-levels. In contrary, Australian livestock price development was more depressed: prices went down to just 80 percent of 1996-levels and reached a level of 130 percent in 2003.

South America

The Uruguayan Peso and the Brazilian Real continuously devaluated during the whole period of consideration down to approximately 30 percent of 1996 values in 2003. The Argentinian Peso was bound at a rate of 1:1 to the U.S. dollar from 1991 to 2001. In January 2002, Argentina declared its financial default, removed the link of the AR-Peso to the U.S. dollar and within a few weeks the exchange rate dropped to around one third, reaching the low Brazilian and Uruguayan levels.

US$-prices reveal that for Brazil and Uruguay the national beef price developments were overcompensated by the currency devaluations against US$, resulting in decreasing US$-prices. In contrary, beef prices in Argentina increased or remained relatively stable in US$-terms until 2001, a result of the constant exchange rate. Following the devaluation of the AR-Peso, prices fell to even lower levels than in Brazil and Uruguay and came back to a level of approx. 80 percent of 1996, the same level as in the two neighbouring countries.

Livestock prices in US$-terms showed increases in 1997 and 1998 in all three countries before decreasing to end at levels of between 80 percent (Brazil) and 100 percent (Uruguay) of 1996-levels.

Sensitivity analysis for livestock prices

The sensitivity to livestock prices changes is similar to the European farms in the previous Chapter. A change of 10 percent in livestock prices will change the cost from the profit and loss account between 4 and 5 percent in the pastoral systems in South America and Australia and around 7 percent in the U.S.-feedlot with its short and intensive finishing period.

	US-7200	AU-1100	AR-1000	AR-1300	AR-2700	BR-180	BR-500	UY-880
Animal purchases in % of cost from P&L account	66%	35%	55%	49%	54%	43%	45%	54%
Sensitivity: a change of 10 % in livestock price will change cost from P&L by ...	7%	4%	5%	5%	5%	4%	5%	5%

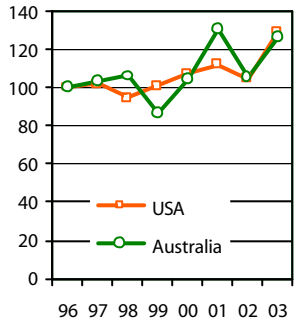
Sources

Eexchange rates: *http://www.oanda.com, see also Annex 2.*

4.6 USA, Australia, South America: Price indices in US$

USA, Australia

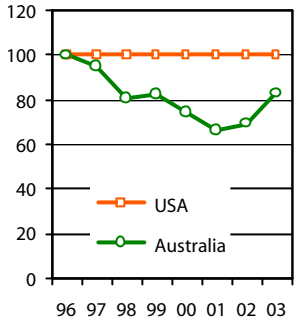
Beef prices national currency



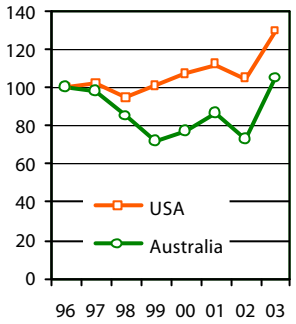
Type of animal

USA	Steers per kg LW
Australia	Steers per kg LW

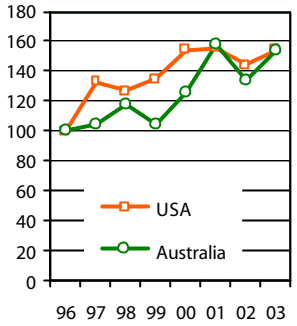
Exchange rate
US$ per national currency



Beef prices US$



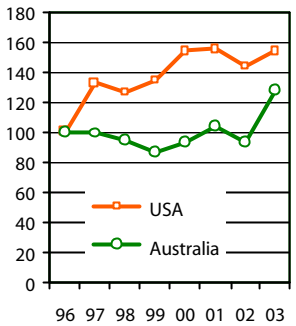
Livestock prices nat. currency



Type of animal

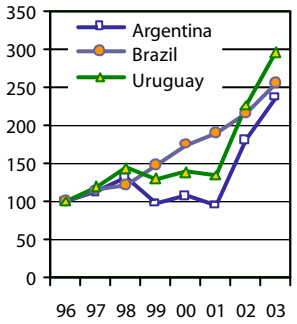
USA	Steer weaner per kg LW
Australia	Steer weaner per kg LW

Livestock prices US$



Argentina, Brazil, Uruguay

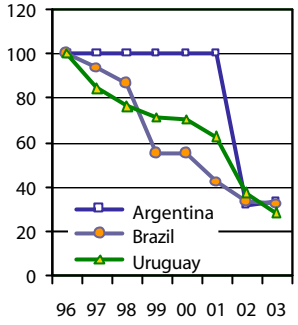
Beef prices national currency



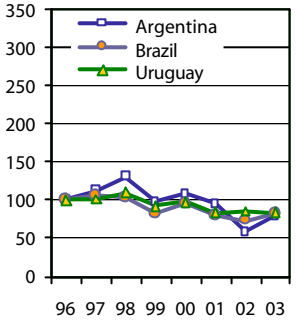
Type of animal

Argentina	Steers per kg LW
Brazil	Steers per kg CW
Uruguay	Steers per kg LW

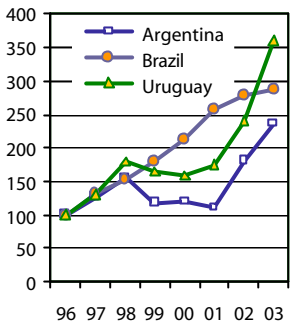
Exchange rate
US$ per national currency



Beef prices US$



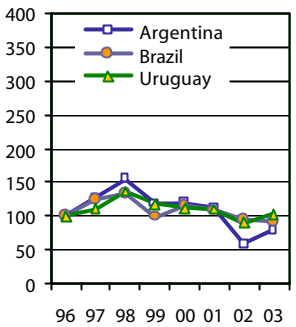
Livestock prices nat. currency



Type of animal

Argentina	Weaner calves per kg LW
Brazil	Weaner calves per head
Uruguay	Weaner calves per kg LW

Livestock prices US$



5.2 Germany – Production systems

Zazie von Davier

FAL

Beef finishing

Farm		DE-190	DE-240	DE-280	DE-360
Region		Bavaria	Bavaria	Northrhine-Westphalia	Mecklenburg W. Pomerania
Legal Status		Family farm	Family farm	Family farm	Limited Liability Co.
No. of beef cattle (sold / year)	No.	191	238	280	362
Land					
Total land	ha	68	92	70	1,420
Share of arable land	%	96%	95%	100%	51%
Share of grassland	%	4%	5%	0%	49%
Land of beef enterprise	ha – %	33 48%	72 79%	70 100%	268 19%
Feed from own production					
Pasture	ha – %				
Hay or silage from grass	ha – %	3 10%	4 5%		114 43%
Other hay or silage	ha – %	17 56%	38 53%	50 71%	93 35%
Other feed / grains	ha – %	10 34%	31 42%	20 29%	60 22%
Periods					
Age at start	days	50	50	60	180
Age at end	days	487	523	574	540 - 680
Total duration of finishing period	days	437	473	514	360 - 500
Productivity					
Weight at start	kg LW	85	79	87	160 - 240
Weight at end (LW)	kg LW	649	673	680	620 - 685
Weight at end (CW)	kg CW	372	388	408	319 - 387
Daily weight gain	g/day	1,291	1,255	1,154	920 - 1,236
Death rates	%	4%	3%	3%	0%
Dressing percentage	%	57%	58%	60%	52% - 57%
Category of animals					
Animals produced	text	Steers	Bulls	Bulls	Steers / Bulls
Incoming animals	text	Weaners	Calves	Calves	Backgr. / Weaners
Animals origin					
Dairy / Cow-calf	text	Cow-calf	Dairy	Dairy	Dairy / Cow-calf
Own / Purchase	text	Own	Purchase	Purchase	Purchase / Own

Cow-calf

Farm		DE-600	DE-500
Region		Mecklenburg W. Pomerania	Mecklenburg W. Pomerania
Legal Status		Limited Liability Co.	Cooperative
No. of cows	No.	600	500
Land			
Total land	ha	1.420	2.130
Share of arable land	%	51%	72%
Share of grassland	%	49%	28%
Land of cow calf enterprise	ha – %	661 47%	740 35%
Feed from own production			
Pasture	ha – %	450 68%	375 42%
Hay or silage from grass	ha – %	126 19%	265 30%
Other hay or silage	ha – %	87 13%	250 28%
Other feed / grains	ha – %		
Annual production			
Cull and slaughter animals	t LW – %	84 47%	54 38%
Breeding animals	t LW – %		
Calves sold/going to fattening	t LW – %	93 53%	88 62%
Adult cattle sold/going to fattening	t LW – %		
Replacement and calving			
Calving period	text	continuous	continuous
Replacement rate	%	26%	19%
Age at first calving	months	25	25
Cow calf productivity			
Weaned calves / 100 cows and year	calves / year	94	92
Calf losses	%	8%	11%
Weaning age	days	180	240
Weaning weight	kg LW	190 - 240	220 - 260

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