

SHEEP AND GOAT MEAT IN THE EU

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Abstract: *Though the EU slaughtered 57 million sheep and goats in 2018, it is still a net importer of sheep and goat produce (meat, milk) and products (wool), with Australia (where the leg of roast lamb is a national dish) and New Zealand supplying its bulk imports. Sheep meat is a staple food in the Mediterranean Basin and an integral component of many meals (including both Christian and Muslim religious feasts). In this context, managers and marketers focus on sheep and goat meat dashboard (for the latest information on production, prices, and trade), production (for monthly production figures expressed in tonnes as well as number of animals), prices (for heavy and light lamb per Member State and weighted averages over the Union), short-term outlook (for the latest data and interpretation of market experts), and trade (for monthly import / export figures).*

Key words: *sheep meat, goat meat, the EU, production, price, trade.*

INTRODUCTION

Sheep and goat meat production and consumption in the EU have some interesting dynamics. The factors below contribute to a stable and sustainable market for sheep and goat meat in the [4,5,15]:

- Consumption: Per capita consumption of sheep meat is expected to grow slightly, reaching around 1.4 kg per capita by 2031, while goat meat consumption is also stable, with a per capita consumption of around 1.3 kg per year;

- Exports: EU exports around 10% of its sheep meat production, mainly to the Middle East and North Africa;

- Imports: The EU imports about 20% of its sheep and goat meat, with New Zealand being the largest supplier, accounting for about 80% of imports;

- Market measures: The EU supports its farmers through income support payments and has measures in place to manage market fluctuations, such as private storage aid and exceptional market support in cases of animal diseases; [8,10,11,16]

- Production: The EU has a significant sheep and goat population, with over 70,000,000 animals, primarily in economically vulnerable areas like mountain regions. Major producers include Spain, Greece, France, and Romania. [2,5,17]

MATERIALS AND METHODS

The material used in this paper consists in a corpus of articles and official documents on sheep and goat meat in the EU. The research method used is corpus analysis.

RESEARCH RESULTS

Consumption. Per capita consumption of sheep meat is expected to grow slightly, reaching around 1.4 kg per capita by 2031, while goat meat consumption is also stable, with a per capita consumption of around 1.3 kg per year. Sustainability is expected to play an increasingly prominent role in EU meat markets, both for producers and consumers due to changes in farming practices, innovative technologies, and modernization. Still, the investments required to do so remain a challenge. Consumers habits and concerns over the environment and climate change will result in consumers paying further attention to the

production process and products' origin. Overall, EU meat per capita consumption is expected to drop, except for per capita consumption of sheep meat, which is expected to grow slightly by 2031 and reach 1.4 kg per capita thanks to the diversification of the meat diet and changing consumption patterns (Figure 1).

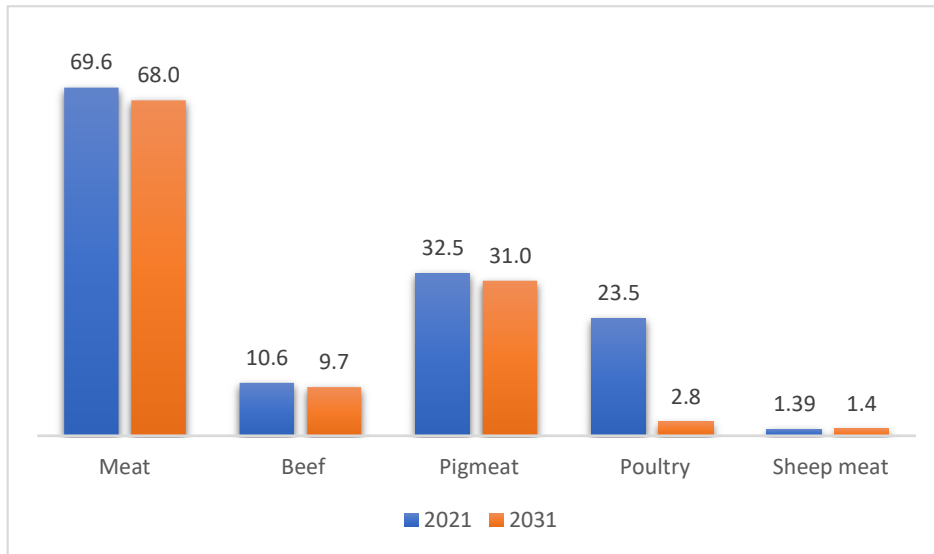


Figure 1. Meat consumption in the EU per capita (kg)

Source: own source

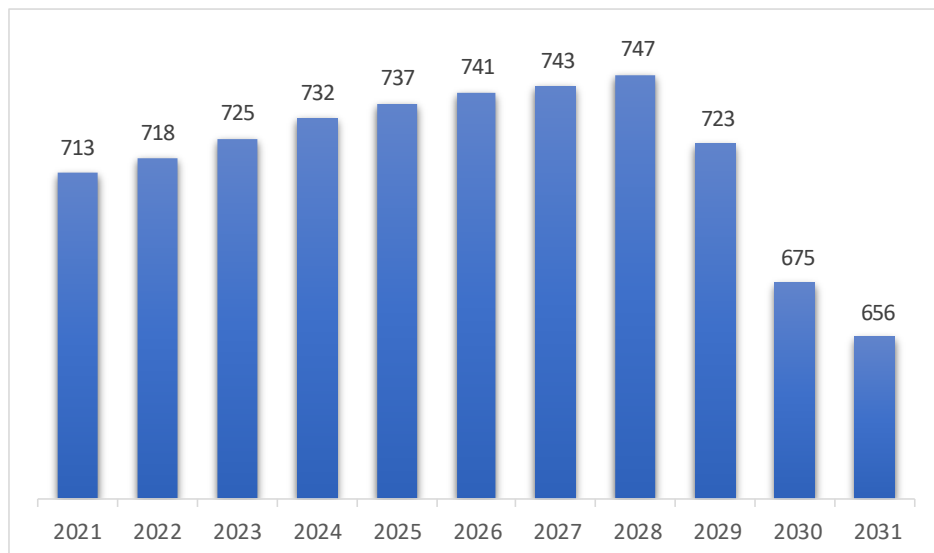


Figure 2. Forecast volume of sheep meat consumed in the EU (EU-27) from 2021 to 2031 (in 1,000 t)

Source: after [14]

Exports. EU exports approximately 10% of its sheep meat production, with the primary destinations being the Middle East and North Africa. Live sheep are also traded to the same regions, while sheep meat is predominantly shipped to the Far East. The main exporting countries within the EU are Romania and Spain [13].

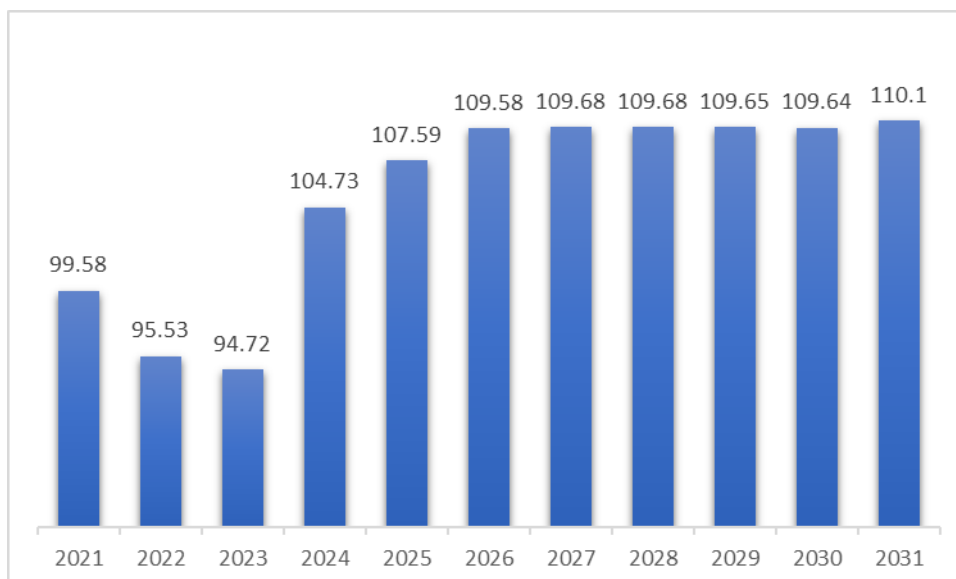


Figure 3. Forecast volume of sheep meat exported from the EU (EU-27) from 2021 to 2031 (in 1,000 t)

Source: after [14]

Imports: The EU imports about 20% of its sheep and goat meat, with New Zealand being the largest supplier, accounting for about 80% of imports. Australia and Mercosur countries (e.g., Brazil and Argentina) also contribute significantly to the EU's imports. Imports account for 20% of the EU's consumption of lamb, mutton, and goatmeat. New Zealand is the EU's biggest supplier (about 80% of imports), followed by Australia and Mercosur countries [15].

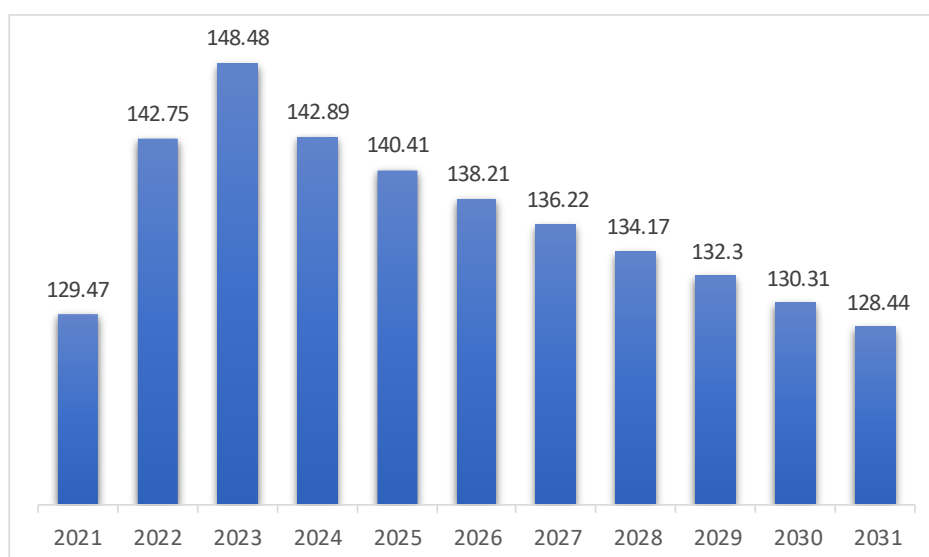


Figure 4. Forecast volume of sheep meat imported to the EU (EU-27) from 2021 to 2031 (in 1,000 t)

Source: after [14]

Market measures. The EU supports its farmers through income support payments and has measures in place to manage market fluctuations (e.g., exceptional market support in cases of animal diseases, loss of consumer confidence, and private storage aid). The EU has several market measures in place to support the sheep and goat meat sectors (as part of

the Common Market Organisation) and to maintain a stable and sustainable market for sheep and goat meat [15]:

- **Exceptional market support:** in cases of animal diseases or significant market disruptions, the EU can provide exceptional support to help farmers manage the impact;
- **Income support payments:** farmers receive income support to help offset the low-profit nature of sheep and goat farming;
- **Market monitoring:** the EU continuously monitors market conditions, including prices, production, and trade, to ensure timely interventions when needed;
- **Private storage aid:** this measure allows producers to store sheep and goat meat for a certain period, helping to stabilize prices during times of market imbalance;
- **Tariff-rate quotas:** imports of sheep and goat meat are managed through tariff-rate quotas, which help control the volume and origin of imports.

The only **sheep and goatmeat-related market measure** is *storage by the private sector*. This happens when, during times of lower market prices, the EU provides support to private sector operators in paying for the cost of storage of their products for a determined period, which temporarily reduces the impact of short-term oversupply [9].

Production. The EU has a significant sheep and goat population, with almost 70,000,000 animals (85% sheep and 15% goats), primarily in economically vulnerable areas like mountain regions. Heavy lambs (13+ kg) are produced in Ireland, light lambs are produced in Greece and Italy, and mixed lambs are produced in Spain and France [2, 3]. **In 2023, Romania ranked 2nd (19%) among EU sheep meat producers** (after Spain, 23%) **and 2nd (21%) among EU goat meat producers** (after Greece, 31%) [6]. Sheep and goat meat production in the EU is a significant part of the agricultural sector, and the figures below highlight the importance of sheep and goat meat production in the EU's agricultural landscape:

- **Consumption:** per capita consumption of sheep meat is expected to grow slightly, reaching around *1.4 kg per capita by 2031*. Goat meat consumption is also stable, with a per capita consumption of around *1.3 kg per year* [7];
- **Exports:** the EU exports around *10% of its sheep meat production*, mainly to the Middle East and North Africa;
- **Imports:** the EU imports about *20% of its sheep and goat meat consumption*, with New Zealand being the largest supplier, accounting for around 80% of imports;
- **Major producers:** Spain, Greece, France, and **Romania** are the leading producers, each contributing significantly to the EU's total production;
- **Population:** as of 2023, the EU had around *68 million sheep and goats*, and **Romania ranked 5th** (in million heads) **in livestock populations** (with the largest share of sheep), after Spain, France, Germany, and Italy, despite the accelerated decline in production [1];
- **Production:** in 2016, sheep and goat meat production amounted to almost *755,000 t*, with a production value of about *€5.3 billion* [12].

Consumption: Per capita consumption of sheep meat is expected to grow slightly until 2028, when it is forecasted to decline;

Exports: EU sheep meat exports are expected to grow slightly until 2031;

Imports: EU sheep meat imports are expected to decline steadily until 2031;

Market measures. EU supports for its farmers will continue through income support payments and measures to manage market fluctuations;

Production: Romania was among **major producers in 2023, when it ranked 2nd (19%) among EU sheep meat producers** (after Spain, 23%) **and 2nd (21%) among EU goat meat producers.**

The EU is a major world player in the production of, and trade in, sheep and goat meat. Statistics published by the Meat and Livestock Commission (MLC) show that, for many years, the EU was the largest producer of sheep and goat meat in the world [2]. In 2021, the EU production and consumption of sheep- and goat-meat were projected to increase slightly. Exports of live animals were due to decrease, mainly because of animal welfare concerns and financial risk. Exports of meat were expected to catch up because of consolidation of trade with EU partners in the Middle East. Imports of sheep meat would recover in the short term but Australia and New Zealand would focus more on Asian markets (EC, 2021). [11, 12]

CONCLUSIONS

Sheep and goat sector-related challenges and perspectives (intrinsic weaknesses, medium-term developments), EU policy framework (animal traceability and health, direct payments – voluntary coupled support, promotion of EU farm products, rural development measures, single common market organization), facts and figures (number of persons employed in sheep- and goat-rearing and their income, population numbers and geographical distribution, sheep and goat production in volume and value), and stakeholders have a dynamics of their own.

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