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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).

• 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 EU (EU agricultural outlook 2021-31: consumer behaviour to influence meat and dairy markets, 2021; EU Outlook: Sheep and goat meat production and consumption rise slightly, 2024; Sheepmeat and goatmeat, 2024):

- 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;
- 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.

• Material and method

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.

• Results and discussions

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).

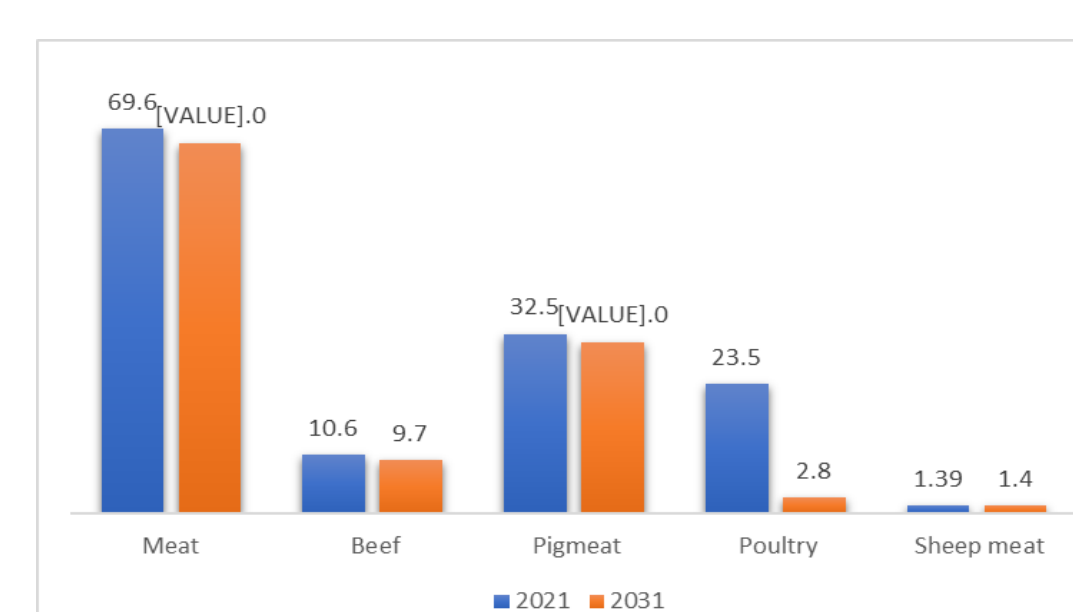


Figure 1. Meat consumption in the EU per capita (kg)

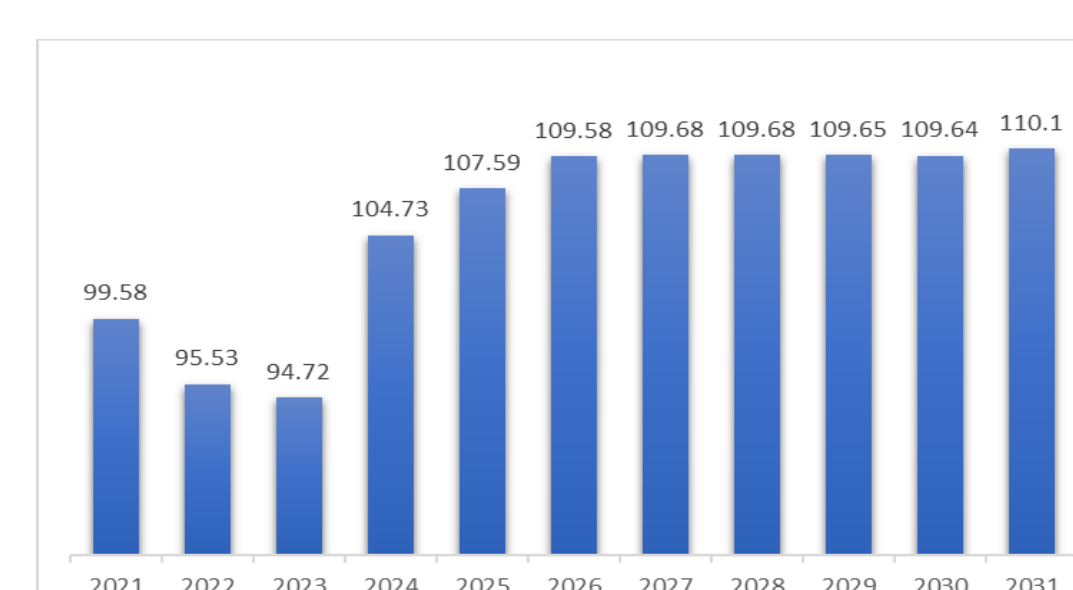


Figure 2. Forecast volume of sheep meat exported from the EU (EU-27) from 2021 to 2031 (in 1,000 t) (after Statista)

• Conclusions

Rossi (2017, 2020) claimed that 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.