

EU sheep and goat population in December 2007 and production forecasts for 2008

The total sheep and goat populations remained relatively stable in 2007 relative to 2006. This may be seen in the light of the slight downward trend recorded in the last years. The main EU (European Union) sheep producing Member States are the United Kingdom, Spain and Greece, while the major goat producers are Greece, Spain and France. From 2006 to 2007, EU sheep and goat meat production in tonnes decreased 3% while meat supply, mainly from New Zealand (86%), remained relatively stable. Sheep and goat prices were in 2007 relatively lower in comparison to 2006.

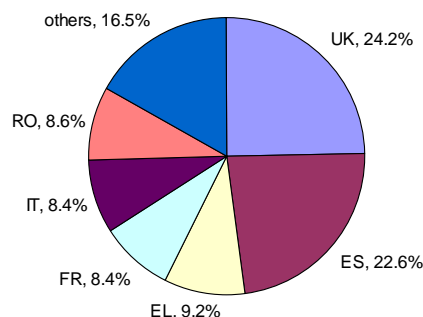
Background

This publication presents information on the EU sheep and goat production, its trends over the past years and production forecasts. The data are not only derived from the November/December 2007 statistical surveys on the sheep and goat populations and meat production, which are carried out by the EU Member States, but also from Comext (external trade data). The sheep and goat production statistics are divided in: (i) surveys of the population broken down by animal categories; (ii) slaughtering statistics; and (iii) production forecasts expressed as the gross indigenous production (GIP) which includes all sheep and goats slaughtered plus the balance of intra-Community and external trade in live sheep and goats. The current legal framework on sheep and goat statistics is defined by Council Directive 93/25/EEC and Commission Decision 2004/747/EC.

In brief

- The total sheep and goat populations remained relatively stable in 2007 relative to 2006.
- From 2006 to 2007, sheep and goat production in tonnes decreased by 2.6% and 6.7% respectively.
- The main Member States producing sheep and goats are Spain, the United Kingdom, Greece, France, Italy, Romania, Ireland, Bulgaria and Portugal.
- Nominal prices of sheep and goats were relatively lower in 2007 in comparison to 2006, in line with a continuously downward trend observed since the second quarter of 2006.

Figure 1: Distribution of the sheep population in the EU in 2007



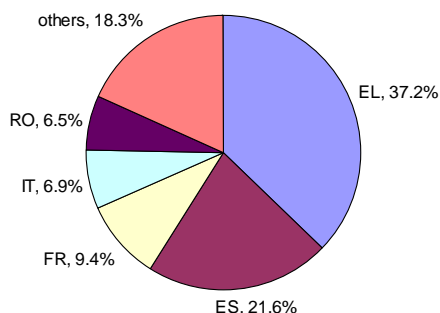
Source: Eurostat

Sheep and goat livestock in the EU

The three EU main sheep producing Member States are the United Kingdom (24.2%), Spain (22.6%) and Greece (9.2%), while the three main

goat producing Member States are Greece (37.2%), Spain (21.6%) and France (9.4%).

Figure 2: Distribution of the goat population in the EU in 2007



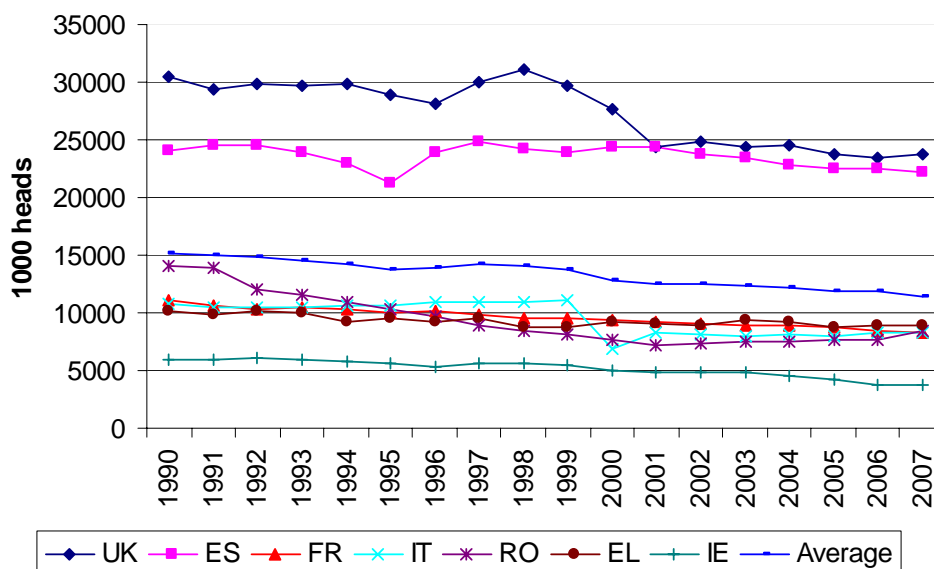
Source: Eurostat

For the main producing Member States (Figure 3), sheep population has declined slightly (-0.4%) from 2006 to 2007 due to the decreases observed in France (-2.5%) and Spain (-1.1%). On the other hand, the sheep livestock increased in Romania (+10.3%), the United Kingdom (+1.2%) and Italy (+0.1%), while it remained stable in Greece.

Concerning goats, in the main producing Member States (Figure 4) livestock numbers have declined slightly (-0.6%) from 2006 to 2007 due to the decreases observed in Bulgaria (-9.8%), Portugal (-6.2%), Italy (-3.7%), Spain (-2.9%) and France (-0.3%). On the other hand, the goat livestock increased significantly in Romania (+18.9%) and remained relatively stable in Greece.

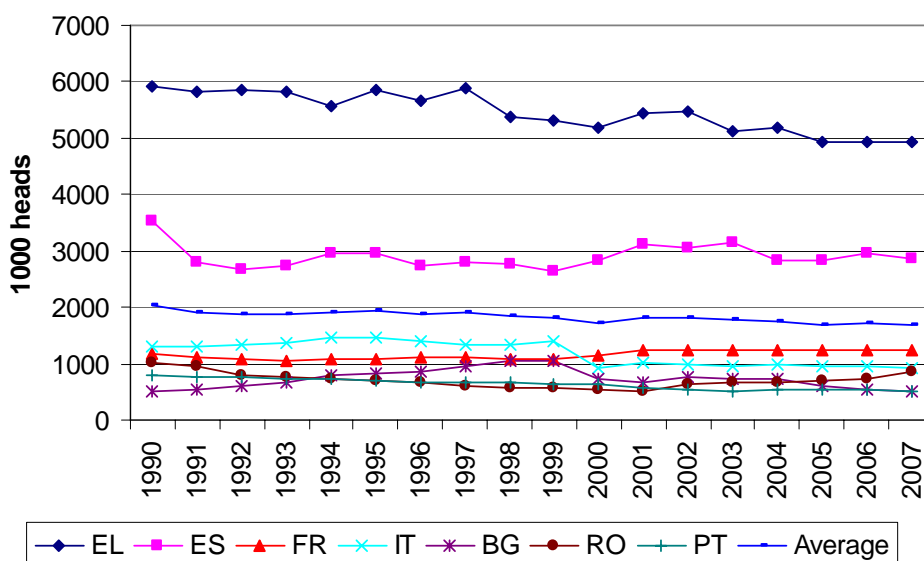
In France in 2007, the flock for dairy sheep remained relatively stable (-0.1%) while sheep meat production decreased moderately (-3.8%); this trend is likely to continue in 2008. Goat milk production is rising as a result of productivity gains, while goat meat production has fallen (-1.4%) in 2007 mainly due to the relatively high prices of feed for fattening kids.

Figure 3: Sheep livestock trend in the main producing Member States



Source: Eurostat

Figure 4: Goat livestock trend in the main producing Member States



Source: Eurostat

Production of sheep and goat meat

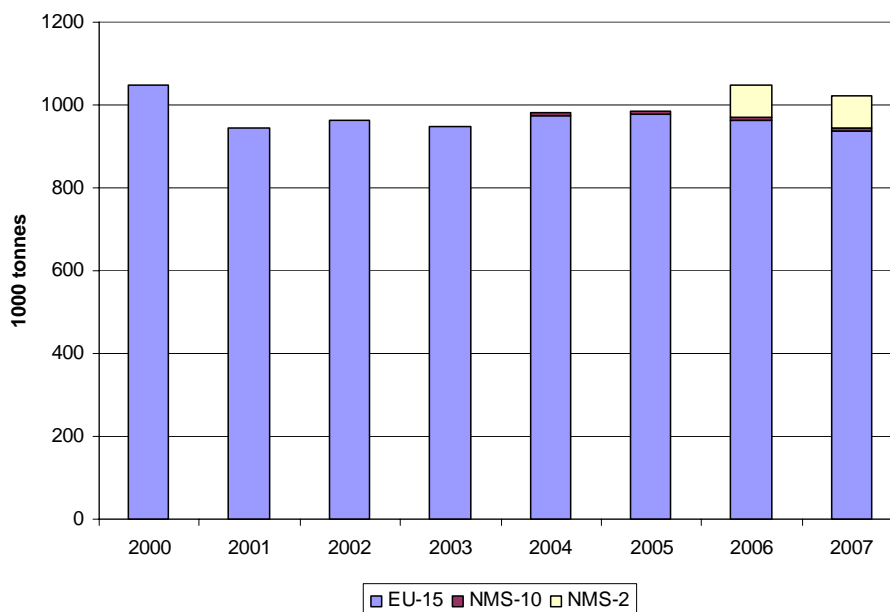
From 2006 to 2007, EU sheep and goat meat production decreased by 3.0%. Sheep meat production decreased by 2.6% and goat meat production was 6.7% lower than in 2006.

Romania and Bulgaria (NMS-2) produced 7.5% of the EU-27 sheep and goat meat while the 10 new Member States (NMS-10) produced only 0.9%. This difference is less marked for goat meat

production where Romania and Bulgaria accounted for 8.6% of the EU-27 total production compared with 7.5% produced by the NMS-10.

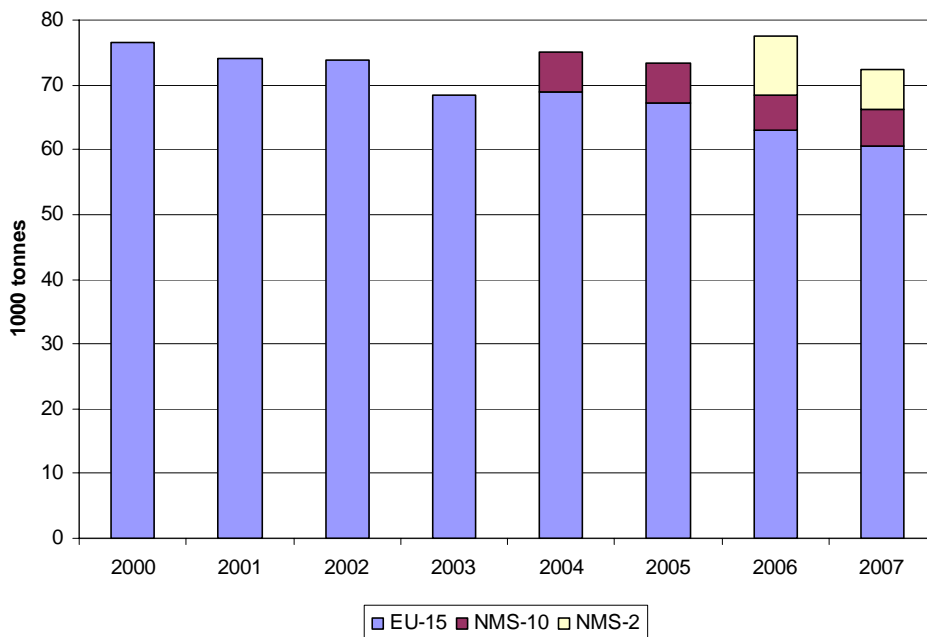
Concerning the meat production trend, there is a slight continuous decrease since 2005 which is likely to be continued to 2008 and 2009. However, the sheep and goat meat supply picture remains relatively stable.

Figure 5: Trend in EU sheep meat production



Source: Eurostat

Figure 6: Trend in EU goat meat production



Source: Eurostat

The EU number of sheep slaughtered decreased (-4.0%) from 2006 to 2007 and is expected to decrease slightly (-1.1%) in 2008. On the other hand, the number of goats slaughtered increased slightly (+0.1%) from 2006 to 2007 and is expected to increase further (+1.8%) in 2008.

In 2008, EU sheep production is partially dependent on the availability and use of the recently developed vaccine against the blue tongue disease.

Figure 7: Trend in EU sheep and goat meat production



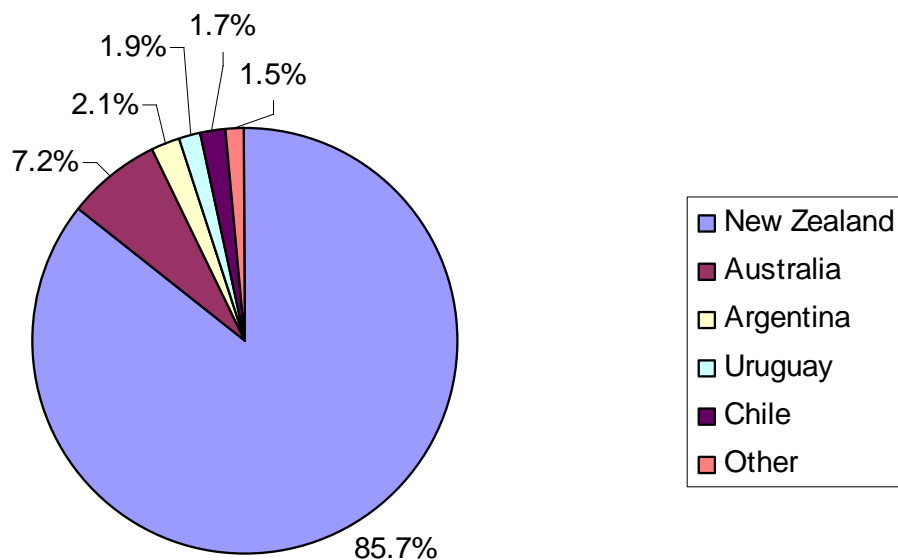
Source: Eurostat

Trade

As regards EU imports, New Zealand is by far the main (86%) origin of sheep meat followed by Australia (7%) and (to a lower extent) Argentina, Chile and Uruguay (around 2% each). It is worth mentioning that since the accession of Romania and Bulgaria to the EU in January 2007, imports from New Zealand increased by 6%. On the other hand, imports from Argentina decreased mainly due to the combined effect of relatively small

production and higher internal consumption. The main imported products are frozen meat (71%) followed by fresh and chilled meat (23%). In 2007, the utilisation of EU import tariff quotas was high by New Zealand (99%), Uruguay (99%) and Australia (97%), and underused by Chile (78%), Iceland (56%), Argentina (24%) and other third countries (60%).

Figure 8: Sheep meat imports by origin in 2007



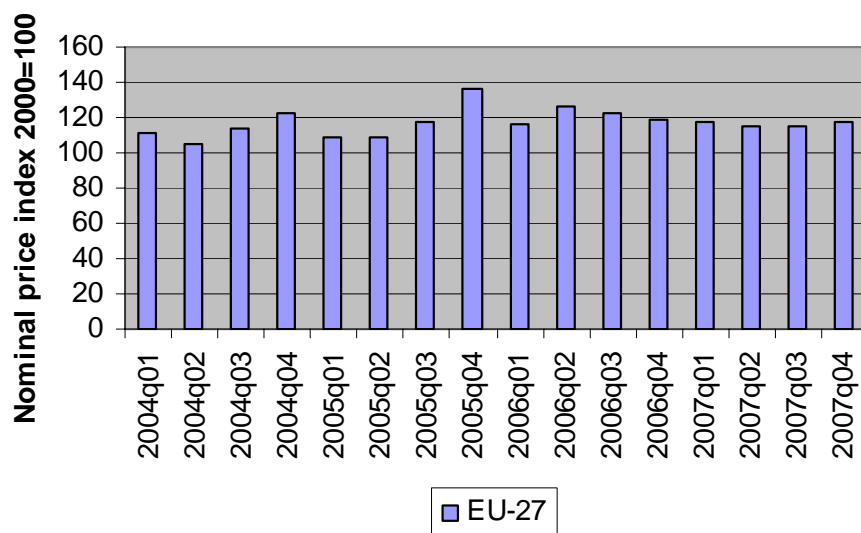
Source: COMEXT

Prices

Sheep and goat prices reached a local maximum in the fourth quarter of 2005. They declined since then and remained relatively stable at around 15% higher than the price of 2000. Prices in 2007 were

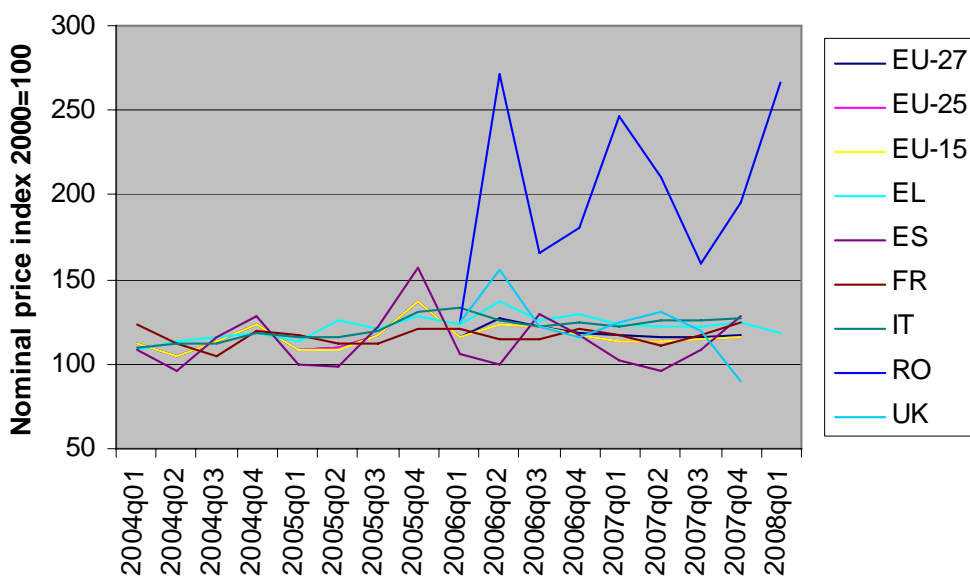
lower in comparison to 2006. Across countries, a rather stable seasonal price picture has been observed since 2004 in the main producing Member States with the exception of Romania.

Figure 9: EU Sheep and goats nominal price index (2000=100)



Source: Eurostat

Figure 10: Sheep and goats nominal price index (2000=100) for main producing Member States



Source: Eurostat

METHODOLOGICAL NOTES

Abbreviations:

| | | | | | |
|----------------|----|-------------|----|-----------------|----|
| Belgium | BE | France | FR | Austria | AT |
| Bulgaria | BG | Italy | IT | Poland | PL |
| Czech Republic | CZ | Cyprus | CY | Romania | RO |
| Denmark | DK | Latvia | LV | Portugal | PT |
| Germany | DE | Lithuania | LT | Slovenia | SI |
| Estonia | EE | Luxembourg | LU | Slovak Republic | SK |
| Ireland | IE | Hungary | HU | Finland | FI |
| Greece | EL | Malta | MT | Sweden | SE |
| Spain | ES | Netherlands | NL | United Kingdom | UK |

| | |
|--------|---|
| EU | European Union |
| EU-27 | European Union (27 Member States, from 2007 onwards) |
| EU-25 | European Union (25 Member States, 2004 - 2006) |
| EU-15 | European Union (15 Member States, 1995 - 2004) |
| NMS-10 | Ten new EU Member States, from 2004: CZ, EE, CY, LV, LT, HU, MT, PL, SI, SK |
| NMS-2 | Two new EU Member States, from 2007: RO, BG |
| GIP | Gross Indigenous Production |

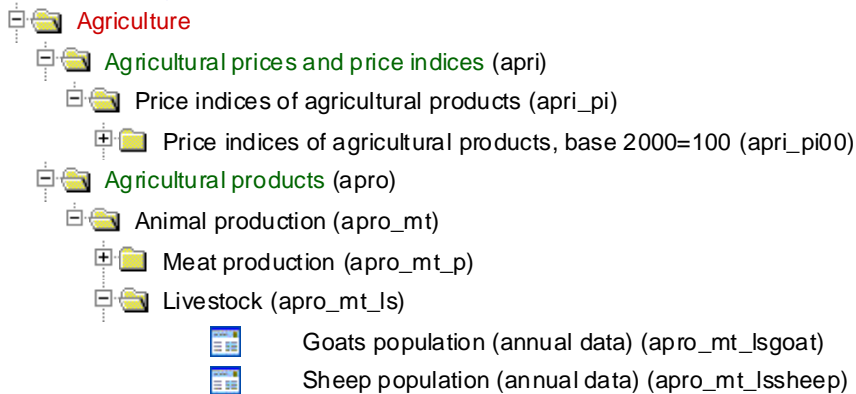
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