



OVINE MEAT

Industry sheet

Key statistics

82,000 tonnes CWE produced every year, of which:
66,100 tonnes CWE of lamb
15,900 tonnes CWE of cull sheep meat
2nd European importer and consumer
93,900 tonnes CWE of meat and live animals imported each year



INDUSTRY STRUCTURE

- Production is extremely fractured:
 - 58% of suckler ewe farms own fewer than 50 sheep
 - Only 18% of suckler farms own more than 200 sheep, but they account for 66% of the national herd
- 50 organisations for commercial and non-commercial producers operate in the sector.
- Direct sales and subsistence farming account for 5% of slaughtering in France.



PRODUCTION

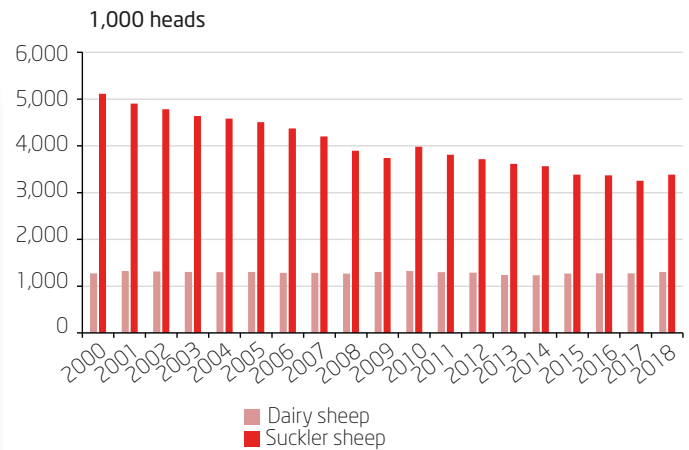
- The herd can be divided into suckler ewes: 3.8 million heads owned by 36,000 farms, and dairy sheep: 1.6 million heads owned by 4,600 farms.
- With regard to meat, two production systems coexist in France, one of which focuses on the use of grassland, the other on the production of lamb in sheep-pens.
- Dairy sheep are farmed mainly in Aveyron, Pyrénées-Atlantiques and Corsica.
- In 2013, specialist farms were home to 73% of the herd, with the remaining 27% being found on farms where sheep farming was a sideline.
- Lamb production has been constantly falling since the 1980s.
- 17% of the production is marketed under SIQO (quality and origin identification label). There were 25 SIQOs for ovine meat in 2016.
- Amongst these, the number of farmers committed to Label Rouge standards is growing by 2% every year (while the number of suckler ewe breeders is falling), and the tonnage sold under Label Rouge has increased by 20% over the past ten years.



PROCESSING

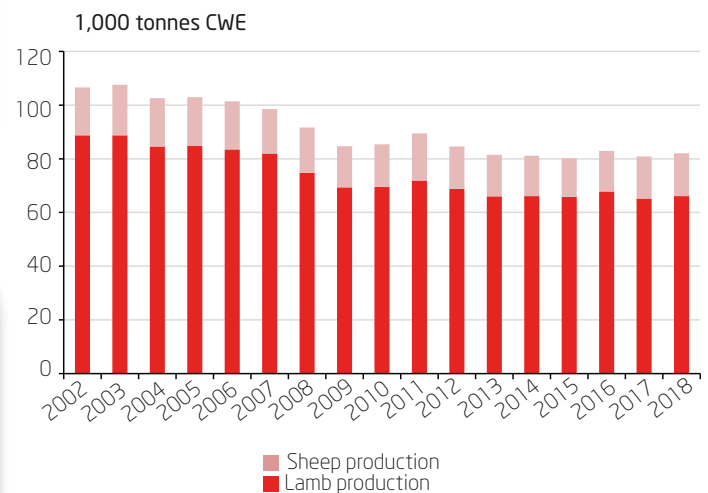
- With 82,000 tonnes CWE in 2018, France is Europe's third biggest producer of ovine meat, behind the United Kingdom and Spain.
- France has 176 abattoirs certified to slaughter sheep, with around a dozen accounting for more than 50% of the total slaughtered (more than 3,000 tonnes CWE per year). With sheep production remaining widely dispersed throughout the country, low-capacity facilities stay open to provide local services. These are mainly mixed abattoirs where sheep represent a minor share of their business.

Changes in suckler and dairy sheep in France since 2000



Source: FranceAgriMer from SSP

Development of sheep production in France



Source: FranceAgriMer from SSP and French customs



SALE

- Traditional supply chains still play an important role: more than 22% of household purchases are made in traditional butchers, compared to 61% of purchases made in supermarkets.
- Around 15% of meat is destined for out-of-home catering.
- 17% of ovine meat is sold with a seal of quality, mainly PGI and Label Rouge.



CONSUMPTION

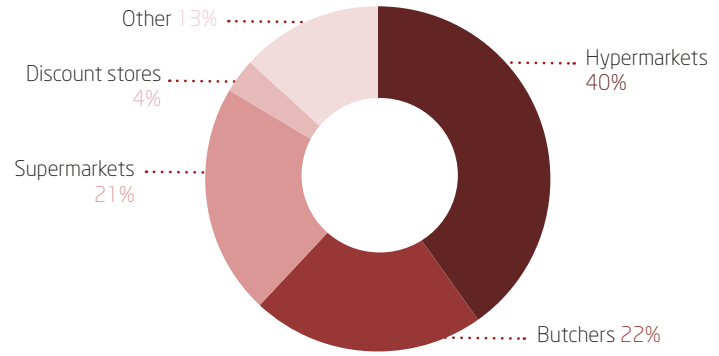
- Consumers are eating significantly less ovine meat, falling from 5.5 kg per capita per year in the 1990s to 2.8 kg per capita per year in 2018. In total, consumption stood at 163,500 tonnes CWE in 2018.
- France supplies 50% of its own ovine meat, meaning that much of the ovine meat consumed in France is imported.
- Purchases are highly seasonal: more than 15% of purchases are made at Easter.
- France is the second biggest consumer of ovine meat in Europe, after the United Kingdom and ahead of Greece and Spain.



TRADE

- France is a net importer of ovine meat: it imported 91,200 tonnes CWE and exported 9,120 tonnes CWE in 2018. Its main supplier countries are the United Kingdom (40%) and Ireland (19%). Additional meat is imported from New Zealand and Spain. France imports 80% fresh and chilled meat, and 20% frozen meat.
- France's live sheep exports totalled 414,000 heads in 2018, of which:
 - 88% was lamb, mainly suckling lambs exported to Spain and Italy around Christmas
 - 12% cull sheep
- Exports of live cull sheep and heavy lambs are mainly sent to Spain (82% in 2018).
- France exports 9,120 tonnes CWE of ovine meat, of which 20% comes from cull sheep.

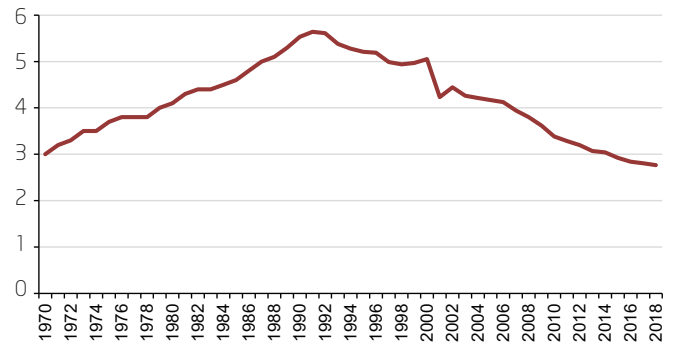
Where French households bought ovine meat in 2018



Source: FranceAgriMer from Kantar Worldpanel

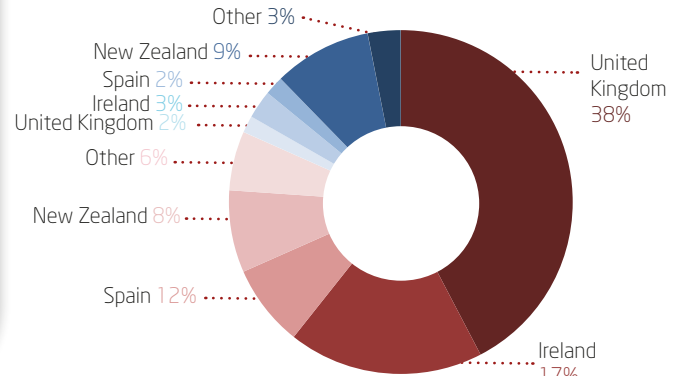
Changes to consumption of ovine meat in France

kg per capita per year



Source: FranceAgriMer from French customs and SSP

Breakdown of French ovine meat imports in 2018: fresh meat (red) and frozen meat (blue)



Source: FranceAgriMer from French customs



DISTRIBUTION OF THE ORIGINS OF MEAT IMPORTED BY FRANCE IN 2018

1,000 tonnes CWE



Source: FranceAgriMer from French customs