

STUDY ON SHEEP AND GOAT MEAT MARKET IN ROMANIA

Elena SOARE

University of Agronomic Sciences and Veterinary Medicine of Bucharest, 59 Mărăști Blvd,
District 1, 011464, Bucharest, Romania, Phone: +4021.318.25.64, Fax: + 4021.318.25.67, Email:
soare.elenausamv@gmail.com

Corresponding author: soare.elenausamv@gmail.com

Abstract

This study is an overview on sheep and goat market evolution in Romania, since 2009 until present. In order to achieve a more illustrative picture of this market, there were analyzed several indicators, as following: sheep and goat livestock; realized meat production; average weight at slaughter; average purchase prices for sheep meat; sheep and goats value exports. Sheep and goat market in Romania had a positive evolution during the analyzed period. Within this scientific paper there have been used statistical data from the specialized institutions in Romania and from FAOSTAT. For 2009 – 2014 period of time, one aimed to realize a mainly quantitative analysis. As a conclusion the sheep and goats livestock is continuously increasing, as well as meat production and export.

Key words: goats, market, production, Romania, sheep

INTRODUCTION

In Romania, sheep and goat farming is a traditional activity. Due to livestock size and realized productions, Romania occupies an important level within the European Union regarding sheep and goat growing and exploitation. Romania has certain advantages which directly contribute to the sustainability of this activity sector, such as: the large area of meadows; genetic background that is well adapted and preserved to local and regional conditions; realized productions diversity; reduced energy consumption; existence of some traditional regions of farming and obtaining productions and so on [1,4]. This activity sector can be analyzed from three points of view: economical, ecological and social. Under the circumstances of market economy and competitive pressure, the profitability of this sector is particularly emphasized. The profitability is influenced by: size of production costs; the existence of specialized breeds; the number of slaughterhouses and their endowment; efficient organization of marketing; the existence and growth of infrastructure; domestic consumption of sheep and goat meat and so on [6,11]. This activity sector could bring substantial incomes for farmers in Romania in terms of exports orientation and intensification to non- EU countries.

MATERIALS AND METHODS

In order to realize this scientific study there have been used, processed and analyzed data related to: sheep and goat livestock; realized meat production; average weight at slaughter; average purchase prices for sheep meat; sheep and goats value exports. The data were used to describe in a more realistic way the evolution of sheep and goat market in Romania and they were taken from the official websites of the National Institute of Statistics, the Ministry of Agriculture and Rural Development and FAOSTAT.

RESULTS AND DISCUSSIONS

In Table 1 one could observe the evolution of sheep and goat livestock in Romania and at regional level. During 2009-2014, sheep and goat livestock had an oscillatory evolution a period to another. In accordance with statistical data regarding the sheep number, our country occupied the fourth place (in 2009) within the European Union after the United Kingdom of Great Britain and Northern Ireland, Spain and Greece [7].

About 198,729 farmers are raising sheep and goats and the average farm size is about 16 heads.

In Romania sheep livestock increased in 2014 (+4.11%) in comparison with 2009. In

Romania's development regions, sheep livestock recorded different evolutions. In 2014, in the Centre Region there was recorded the largest sheep livestock (2,095,670 animals). On the opposite side, the smallest sheep livestock registered in 2014 too, was in Bucharest-Ilfov Region (30,707 animals).

Goat livestock recorded a significant growth during the analyzed period of time [5]. In 2014, these increased at national level with 54.4% in comparison with 2009. Analyzing the development regions, one could observe increases through all the regions in 2014 compared to 2009.

Table 1. The evolution of sheep and goat livestock at national level and by development regions, 2009-2014 (number)

Specification	2009	2010	2011	2012	2013	2014	2014/2009 (%)
Sheep							
Romania	9,141,482	8,417,437	8,533,434	8,833,830	9,135,678	9,518,225	104.1
North-West Region	1,393,323	1,335,270	1,330,825	1,372,997	1,406,954	1,610,376	115.5
Center Region	1,785,165	1,856,568	1,931,589	1,991,095	2,047,133	2,095,670	117.3
North-East Region	1,585,477	1,240,359	1,258,352	1,296,866	1,326,483	1,369,698	86.3
South -East Region	1,503,386	1,296,159	1,302,978	1,357,539	1,401,181	1,439,291	95.7
South Muntenia Region	927,757	788,836	812,676	832,858	864,870	884,112	95.2
Bucharest –Ilfov Region	26,751	29,445	25,352	27,869	29,043	30,707	114.7
South-West Oltenia Region	715,798	600,861	610,385	61,8740	633,858	657,169	91.8
West Region	1,203,825	1,269,939	1,261,277	1,335,866	1,426,156	1,431,202	118.8
Goat							
Romania	917,304	1,240,786	1,236,143	1,265,676	1,312,967	1,417,176	154.4
North-West Region	79,685	92,603	90,643	90,714	95,074	105,040	131.8
Center Region	86,645	109,379	105,768	113,241	117,484	125,069	144.3
North-East Region	128,906	193,379	198,332	202,680	208,919	222,704	172.7
South -East Region	225,096	307,922	317,218	320,685	328,476	361,683	160.6
South Muntenia Region	155,493	231,500	224,370	224,604	237,298	251,816	161.9
Bucharest –Ilfov Region	8,261	7,911	8,935	10,854	11,428	12,877	155.8
South-West Oltenia Region	182,734	244,965	235,949	246,666	251,563	270,713	148.1
West Region	50,484	53,127	54,928	56,232	62,725	67,274	133.2

Source: [9]; own calculations

In Table 2 there is presented the evolution of sheep and goat livestock per 100 ha. This evolution is presented both at country level and by development regions. At national level there is ascertained an increase of sheep and goats number per 100 ha in 2014 (81.0 animals) in comparison with 2009 (76.4 animals). At development regions level, in most cases, it is observed a growth of sheep and goat livestock per 100 ha, in 2014 than in 2009. The North-East Region is the only one where there was registered a decrease in 2014 (82.8 animals) in comparison with 2009 (89.1

animals). The highest density per 100 ha could be observed in Centre Region, during 2009 – 2014 where it is reached a maximum in 2014 (120.2 animals) [2]. At the opposite, the lowest density is related to South-Muntenia Region. According to official data at the end of 2012, Romania was ranked on the seventh place concerning the number of sheep and goats per 100 ha. The first positions of this classification were occupied by: Greece, The United Kingdom of Great Britain and Northern Ireland, Spain, Portugal, Netherlands and Italy [8].

Table 2. Evolution of sheep and goats per 100 ha at national level and by development regions, 2009-2014 (number)

Specification	2009	2010	2011	2012	2013	2014	2014/2009 (%)
ROMANIA	76.4	70.5	72.2	74.6	77.4	81.0	106.0
North-West Region	81.1	75.9	75.5	77.7	81.9	93.6	115.4
Center Region	106.6	109	112.5	116.1	117.2	120.2	112.7
North-East Region	89.1	71.8	76.9	79.2	79.8	82.8	92.9
South -East Region	79.1	71.4	72.4	75	76.8	79.9	101.0
South Muntenia Region	46.7	44.7	44.9	45.8	47.9	49.4	105.7
Bucharest –Ilfov Region	34.7	32.4	36	40.7	55.6	59.8	172.3
South-West Oltenia Region	57.3	51.9	51.7	52.9	56.1	58.8	102.6
West Region	84.3	75.7	78.8	83.3	87.5	88.1	104.5

Source: [9] ; own calculations

Table 3 presents the dynamics of sheep and goat meat live production, as well as average weight at slaughter at national level, during 2009-2013. It may be observed a fluctuant evolution for meat live production obtained in the analyzed period. In 2013, meat live production increased with 64.4% than in 2009. The lowest production was realized in

2010 (100 thousand tonnes), while the highest one was recorded in 2013 (171 thousand tonnes). Average weight at slaughter increased from 17kg/animal (2009) to 24 kg/animal (2013). The lowest average weight at slaughter was registered in 2010 (16 kg/ animal).

Table 3. Evolution of meat live production and average weight at slaughter for sheep and goats in Romania

SPECIFICATION	2009	2010	2011	2012	2013	2013/2009 (%)
Total meat live production (thousand tonnes)	104.0	100.0	150.0	107.0	171.0	164.4
Average weight at slaughter (kg/animal)	17.0	16.0	21.0	18.0	24.0	141.1

Source: [11]; own calculations

In Table 4 is presented the goat meat production per total of sectors in Romania's counties. According to data presented in Technical-Operative Report at 31st of July, 2015, the realized production of goat meat was 13,542 tonnes. Bacău county is on the first position in goat meat production top (2,067 tonnes). The following places in this

ranking are occupied by the next counties: Galați (1,003 tonnes); Ialomița (891 tonnes); Caraș-Severin (619 tonnes); Vaslui (594 tonnes); Vrancea (491 tonnes). Teleorman (490 tonnes); Mureș (459 tonnes). About 23 % mutton and sheep meat is produced in the South-Eastern Romania, 18 % in the Central part and 14 % in North-East.[3]

Table 4. Goat meat production per total sectors in Romania's counties at 31st of July, 2015 (tonnes)

County	Production	County	Production	County	Production	County	Production
ALBA	111.0	CLUJ	399.0	ILFOV	58.0	TIMIS	55.0
ARAD	106.0	CONSTANTA	47.0	MARAMUR ES	95.0	TULCEA	0.0
ARGES	203.0	COVASNA	87.0	MEHEDINT I	211.0	VASLUI	594.0
BACAU	2,067.0	DAMBOVITA	273.0	MURES	459.0	VALCEA	280.0
BIHOR	109.0	DOLJ	0.0	NEAMT	192.0	VRANCEA	491.0
BISTRITA N.	395.0	GALATI	1,003.0	OLT	221.0	M.BUCUREST I	16.0
BOTOSANI	19.0	GIURGIU	163.0	PRAHOVA	426.0		
BRASOV	248.0	GORJ	44.0	SATU MARE	96.0		
BRAILA	417.0	HARGHITA	206.0	SALAJ	46.0		
BUZAU	36.0	HUNEDOARA	130.0	SIBIU	225.0		
CARAS S.	619.0	IALOMITA	891.0	SUCEAVA	331.0		
CALARASI	131.0	IASI	335.0	TELEORM AN	490.0		
							<i>Total -17,216</i>

Source: [11]

Realized sheep meat production in Romania's counties at 31st of July, 2015 is being presented in table no. 5 in accordance with data published by the Ministry of Agriculture and Rural Development, sheep meat production per total sectors was 100,868 tonnes. Concerning the obtained production, Tulcea county is placed on the first position (5,825 tonnes). The following positions in the biggest sheep meat producers counties are occupied by: Bistrita-Năsăud (5,668 tonnes);

Cluj (5,452 tonnes); Constanța (5,405 tonnes); Călărași (5,003 tonnes); Mureș (4,950 tonnes); Bacău (4,657 tonnes); Sălaj (4,655 tonnes); Prahova (4,397 tonnes). A significant part of farmers that are specialized in farming sheep and goats sign contracts with profile companies. These enterprises take rams and lambs over in order to slaughter in conditions stipulated by law, afterwards the selling being ensured both by supermarkets and shops that sell meat and meat products [8].

Table 5. Sheep meat production per total sectors in Romania's counties at 31st of July, 2015 (tonnes)

County	Production	County	Production	County	Production	County	Production
ALBA	2,909	CLUJ	5,452	ILFOV	35	TIMIS	3,557
ARAD	3,285	CONSTANTA	5,405	MARAMURES	879	TULCEA	5,825
ARGES	2,417	COVASNA	1,035	MEHEDINTI	657	VASLUI	2,210
BACAU	4,657	DAMBOVITA	294	MURES	4,950	VALCEA	1,344
BIHOR	645	DOLJ	103	NEAMT	2,930	VRANCEA	1,589
BISTRITA NASAUD.	5,668	GALATI	3,978	OLT	937	M. BUCURESTI	52
BOTOSANI	828	GIURGIU	377	PRAHOVA	4,394	Total -140,541	
BRASOV	3,286	GORJ	402	SATU MARE	3,007		
BRAILA	1,924	HARGHITA	1,405	SALAJ	4,655		
BUZAU	397	HUNEDOARA	757	SIBIU	1,995		
CARAS S.	3,933	IALOMITA	2,243	SUCEAVA	1,961		
CALARASI	5,003	IASI	2,571	TELEORMAN	917		

Source: [10]

In Table 6, there are presented average purchase prices for live sheep meat weight both at national level and by development regions, during 2009-2014. In this period the average purchase prices followed an ascending trend from 2009 to 2011. In 2012 there was recorded a decrease, while since 2013 they started to grow. The lowest price was recorded at national level in 2009 (5.33

Ron/kg live) and the highest one was registered in 2014 (8.98 Ron/kg live). Concerning the average purchase price by development regions, one could observe a differential evolution. In South-East Region, in 2012 there was registered the highest average purchase price (13.0 Ron/kg live). The lowest price was associated with the year 2009, in the same area (4.25 Ron/kg live).

Table 6. Average purchase prices for live sheep meat weight both at national level and by development regions (Ron/kg live)

Specification	2009	2010	2011	2012	2013	2014
ROMANIA	5.33	5.38	7.07	6.81	8.5	8.98
North-West Region	4.63	5.65	6.26	6.49	8.45	9.01
Center Region	5.36	5.7	7.9	8.15	9.75	9.64
North-East Region	6.04	-	-	3.45	-	-
South -East Region	4.25	5.16	10	13	-	11.33
South Muntenia Region	4.85	-	8.72	5.74	8.99	9.44
South-West Oltenia Region	5	4.4	5.17	4.63	10.24	8.58
South-West Oltenia Region	5.33	5.81	12.79	7.27	8.23	8.35

Source : [8]

The situation of economic accounts in agriculture for sheep and goats is being presented in Table 7. The value at producer's price for sheep and goats recorded fluctuations during the period 2009-2013. The lack of subsidies from 2011 to 2013 did not

contribute to accelerating the development of this activity sector.

In our country there is registered an average annual consumption per capita of 3.0 kg sheep and goat meat, during 2009-2011. Talking about the consumption of sheep meat

processed products in Romania, it mainly has a seasonally character, in Easter Holidays and autumn period. On domestic market, but also on the European one, consumers require certain parts (haunch and chops). Because producers are not able to ensure those

required parts, they import from New Zealand and Australia. These imports are realized in relatively favourable conditions. In Romania, sheep and goat imports are net inferior to exports [10].

Table 7. Economic accounts in agriculture at national level during 2009-2013

Specification	2009	2010	2011	2012	2013
Sheep and goats	Economic Accounts for Agriculture (current prices – millions Ron)				
Value to producer's price	559.64	615.26	892.29	866.68	864.82
Subventions for products	280.4	-	-	-	-
Value to base price	840.04	615.26	892.29	866.68	864.82
Sheep and goats	Economic Accounts for Agriculture (prices of previous year-millions Ron)				
Value to producer's price	441	609.54	679	899.77	692.87
Subventions for products	89.65	305.4	-	-	-
Value to base price	530.65	914.94	679	899.77	692.87

Source: [9]

According to data given by FAOSTAT, Romania exported 3,126 sheep in 2009, but in 2011, the export was reduced to 1,764 animals. Sheep export is significant in comparison with the goat one. In 2009 there were exported 1,590,511 sheep, while in 2011 only 1,791,595 heads.

The value of goat exports decreased from USD Thousand 168 in 2009 to USD Thousand 126 in 2011.

The value of sheep exports increased from USD Thousand 114,484 (2009) to USD Thousand 166,269 (2011). In 2015, sheep exports accounted for Euro Million 150. Nowadays, Romania is on the first place in the ranking of sheep exporting countries within the European Union [12]. Romania has 50% market share.

The most significant exports are realized in: Libya, Jordan, Bulgaria, Greece and Lebanon. For sheep breeders, exports bring profit, which provides safety for business. One could notice that local sheep market registered increases since joining the European Union.

In order to increase the competitiveness of sheep and goat sector are being imposed the following aspects [6, 11]:

- raising sheep and goat livestock;
- giving benefits to those who organize themselves in associations whose main aim is to raise young sheep;
- improving sheep and goat livestock, mainly

for meat production;

-developing some high throughput technologies specific both to growing areas and to each breed;

-using carcass classification grid established in accordance with European Union's standards;

-alignment to European Community standards regarding the manner of granting subsidies;

-stimulating the growth of average sheep meat consumption per capita in Romania;

-increasing incomes of sheep and goat farmers by stimulating sales both domestically and externally;

-exploitation of domestic production on European Union market, but also in Arab countries;

-stimulating the sheep and goat meat exports.

CONCLUSIONS

Following the analysis of sheep and goat market in Romania, there can be observed:

-an increase of sheep and goat livestock in 2014 in comparison with 2009;

-an increase of sheep and goat number per 100 ha in 2014 in comparison with the reference year;

-in 2013, sheep and goat meat live production increased with 64.4% compared to 2009;

-average weight at slaughter grew with 41.1% in 2013 than in 2009;

-average purchase price for live sheep meat increased from 5.33 Ron/ kg in live (2009) to 8.98 Ron/ kg in live (2014) ;
the exports value is significant higher in comparison with imports value;
sheep and goat export is mainly realized towards countries that are not part of the European Union.

REFERENCES

- [1]Cofas, E., Soare, E., 2013, Quantitative study of the world market of meat, Scientific Papers. Series "Management, Economic Engineering in Agriculture and rural development", Vol. 13(2):71-74.
- [2]Dona, I., 2015, Economie rurală, Editura Economică, p. 327
- [3]Pirvutoiu, I., Popescu Agatha, 2013, Considerations on Trends in the Romanian Sheep and Goat Meat Market, 1990-2010, Scientific Papers: Animal Science and Biotechnologies, 2013, 46 (2):412-417
- [4]Soare, E., Cofas, E., Bălan, A., David, L., 2012, Researches and results about the meat market in Romania, Scientific Papers, Series I, Agricultural Management, Vol. XIV (2): 185-192
- [5]Soare, E., Cofas, E., 2012, Research on European Union meat market, Annals of Constantin Brancusi University, Vol. IX, 288-291, Târgu Jiu
- [6]<http://www.anarz.eu/AnarzAdministratorSite/CMSContent/Strategie%20ovine%20%5BCompatibility%20Mode%5D.pdf>
- [7]<http://www.fabricadecarne.ro/in-exporturile-ue-de-carne-de-vita-si-de-oaie-romania-inca-are-un-cuvant-de-spus>
- [8]<http://www.fabricadecarne.ro/oportunitati-si-constrangeri-pe-piata-carnii-din-romania>
- [9]<http://www.insse.ro>, TEMPO-Online National Institute of Statistics, 2016
- [10]<http://www.macelariaradu.ro/clienti/costul-tot-mai-ridicat-reduce-anual-consumul-de-carne/>
- [11]<http://www.madr.ro/cresterea-animalelor/ovine-si-caprine.html>
- [12]<http://politici.weebly.com/export/exportul-de-ovine>