

RESEARCH ON THE LAMB AND MUTTON MARKET IN THE EUROPEAN UNION

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Abstract

This research has surprised the evolution of the lamb and mutton market in the European Union during 2011-2016. In this research, reference has been made to the evolution of this market for the period 2018-2025. In order to carry out the present research, a number of representative indicators for the lamb & mutton market were analyzed. Of the specific indicators of this market we mention: the sheep flocks in the European Union; the production of lamb & mutton; total consumption of lamb & mutton; net exports of lamb & mutton, etc. The indicators analyzed have evolved differently from one year to the next in the European Union. In terms of meat consumption in the European Union, the first place is the pork, with over 39 kg / inhabitant. On the opposite side we find the consumption of lamb & mutton, with over 2.5 kg / inhabitant. A less beneficial aspect for the lamb & mutton market is that, at EU level, imports of lamb & mutton are clearly superior to exports. In this research we used statistical data taken from international specialized sites.

Key words: lamb and mutton, market, European Union; meat production, prices

INTRODUCTION

Concerning the sheep breeding, a significant aspect is represented by the fact that the sheep have the lowest risk of contamination with antibiotic residues. In the spring, sheep have the most tender and lowest fat meat. Sheep meat contains a range of proteins that are easily absorbed by the body.

Along with these proteins in sheep, we find vitamins B [6,8].

Lamb meat is a significant source of protein. If 100 g of lamb is consumed, 60% of the daily protein requirement for the body is provided. Lamb has a high mineral content. Iron, zinc and selenium have a major importance for the health of the population. Only 100 g of lamb contains the following: 40% of the daily zinc requirement and 50% of the body's need for selenium [5].

In Europe, the UK ranks first in terms of sheep meat production. It is followed in this ranking at a considerable distance by: Spain, France, Greece, Ireland, Italy and Germany [11].

According to some specialized studies published on the market, it is shown that in the European Union the most consumed meat is

pork, with over 39 kg / inhabitant. In the top of meat consumption we find: poultry meat over 24 kg / inhabitant; beef with over 16 kg / inhabitant and far away sheep and lamb meat with over 2.5 kg / inhabitant.

The most significant consumption of sheep meat is found in Western Europe, especially France and the United Kingdom [1,9,14].

MATERIALS AND METHODS

In order to accomplish the present research, a series of statistical data related to the European Union were processed and analyzed, such as sheep flocks; the production of lamb & mutton, total consumption of lamb & mutton, consumption of lamb & mutton per locator, selling prices, sheep exports and net exports of lamb & mutton.

The data required for the present research, resulted from the consultation of specialty materials. Statistical data has been retrieved from various international sites.

RESULTS AND DISCUSSIONS

Sheep flocks in the European Union recorded fluctuations from year to year during 2011-

2016 (Fig.1). In 2011, was registered the largest number of sheep at EU level, ie 98.6 million heads. At the opposite end, the smallest flock was recorded in 2016 (85.7 million heads).

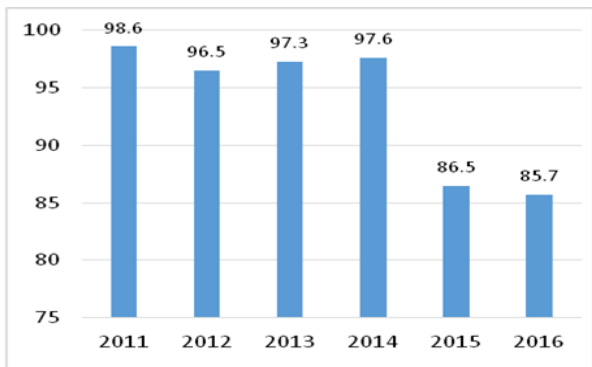


Fig. 1. Sheep flocks in the European Union for the period 2011-2016 (millions heads)

Source: [3,10,12]

From the data published by Eurostat in 2016, in the European Union the largest sheep flocks were registered in the following countries: United Kingdom (23,819 thousand heads), Spain (15,962.89 thousand heads), Romania (9,875 thousand heads), Greece (8,730 thousand heads), Italy (7,284 thousand heads) and France (7,157 thousand heads) (Fig. 2).

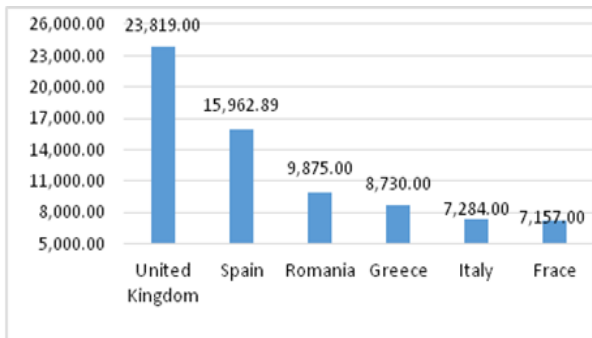


Fig. 2. The top of the first sheep-breeding countries in the European Union in 2016 (thousand heads)

Source:[2]

Also, in 2016, the smallest sheep flocks were registered in countries such as: Austria (378.38 thousand heads); Slovakia (368.90 thousand heads); Lithuania (163.60 thousand heads); Latvia (106.63 thousand heads) and Malta (11.52 thousand heads) (Fig. 3).

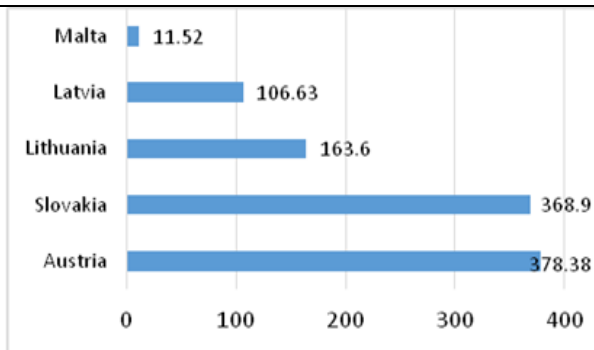


Fig. 3. Top of the countries with the smallest sheep population in the European Union in 2016 (thousand heads)

Source: [2]

The production of lamb & mutton in the European Union during the analyzed period recorded a growing trend. The smallest production was achieved in 2011 (1,032.09 thousand tons), and the largest production was recorded in 2016 (1,053.64 thousand tons). The data show an increase in the production of lamb & mutton by 2.08% in 2016, compared to 2011 (Fig. 4).

According to official data published for the year 2016, the sheep meat production in the European Union was obtained as follows: United Kingdom (33%); Spain (22%); France (10%), etc.

Regarding the degree of self-sufficiency with sheep meat at the level of the European Union during the analyzed period it was the following: 84% (2011); 87% (2012); 87% (2013); 88% (2014); 86% (2015) and 88% (2016) [3,4].

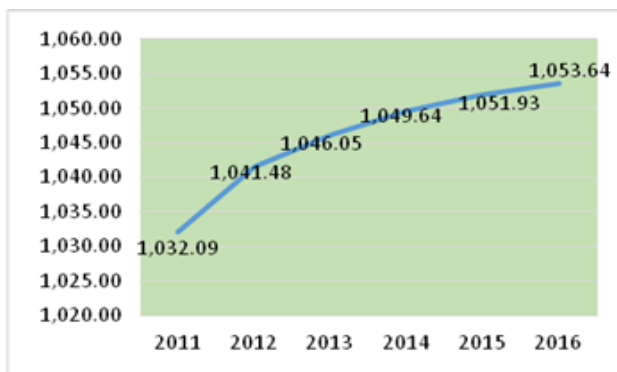


Fig.4. The production of lamb & mutton in the European Union during 2011-2016 (thousands tons)

Source: [4]

Concerning the production of lamb & mutton in the European Union, for the period 2018-2025, an upward trend is expected (Fig.5). For

the year 2025, a production of 1,068.26 thousand tons is expected, which represents a growth of 1.38% compared to 2016.

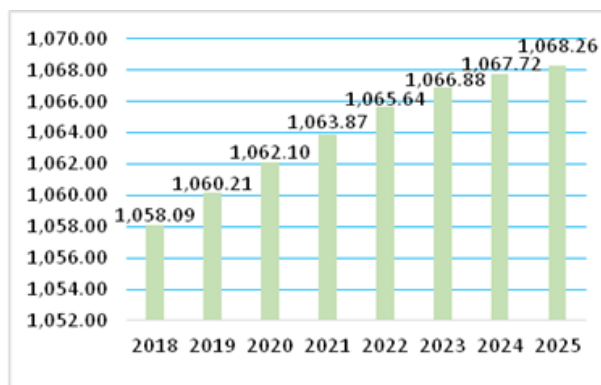


Fig.5. Forecasts for the production of lamb & mutton in the European Union in the period 2018-2025 (thousand tons)

Source: [4]

The total consumption of lamb and mutton in the European Union during 2011-2016 was determined by several factors, including: consumer preferences; the price for this category of meat; traditions, etc. From the official data presented, it is observed that at the community level there was an increasing trend. The highest consumption was registered in 2016 (1,337.11 thousand tons), and the lowest consumption was of 1,296.98 thousand tons (2011) (Fig.6). In 2016, the total consumption of lamb & mutton in the European Union increased by 3.09% compared to 2011.

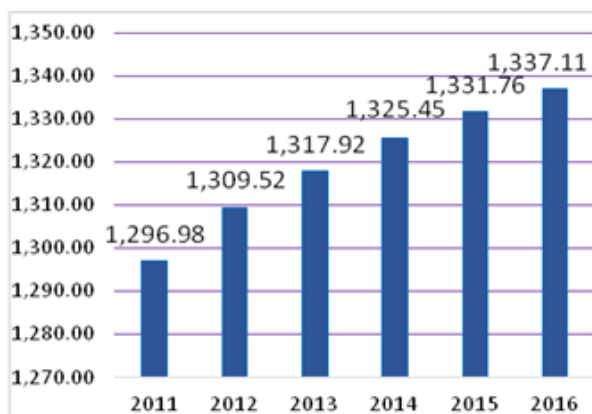


Fig.6. Total consumption of lamb & mutton in the European Union, 2011-2016 (thousand tons)

Source: [4]

According to the data regarding the total consumption of lamb and mutton in the European Union for the period 2018-2025,

there is an increasing trend (Fig.7). The highest total consumption of lamb & mutton meat will be recorded in 2025 (1,381.12 thousand tons). In 2025, total lamb and sheep meat consumption will increase by 3.29% compared to 2016.

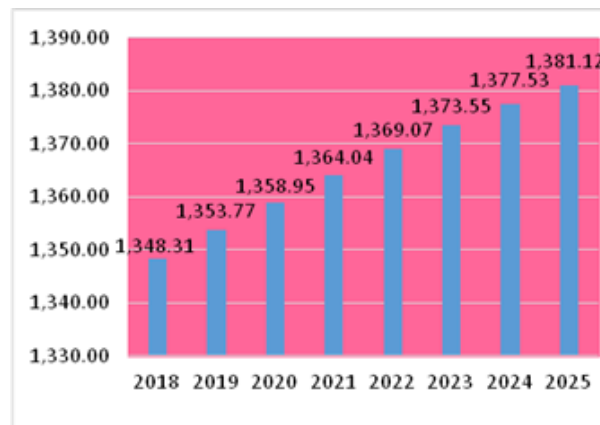


Fig.7. Forecasts for the total consumption of lamb and mutton in the European Union in the period 2018-2025 (thousand tons)

Source: [4]

The consumption per capita of lamb & mutton in the European Union ranged between 2.59 kg/ inhabitant and 2.65 kg/ inhabitant during 2011-2016 (Fig.8). In 2016, the consumption of lamb & mutton per capita increased by 2.31% compared to 2011.

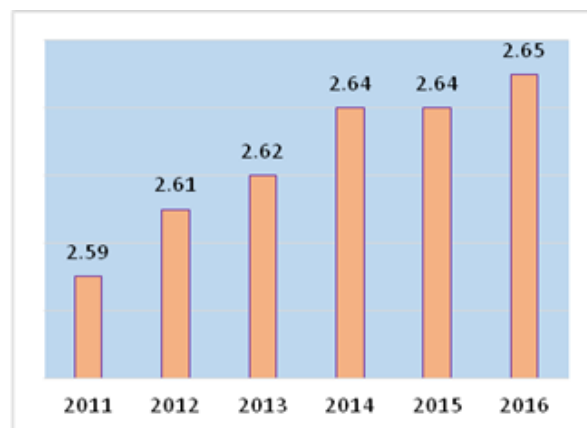


Fig.8. Consumption per capita of lamb & mutton in the European Union, in the period 2011-2016 (kg/inhabitant)

Source: [4]

For the 2018-2025 period, an increase in the consumption per capita of lamb and sheep is expected, from 2.67 kg / inhabitant (2018) to 2.72 kg / inhabitant (2025) (Fig.9). In 2025,

lamb and sheep consumption will increase by 1.87 compared with 2016.

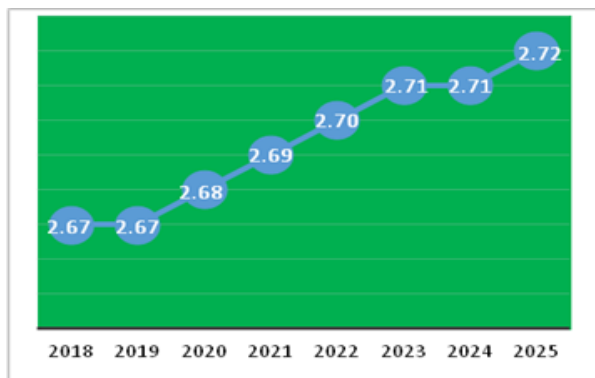


Fig. 9. Estimates of consumption of lamb & mutton per capita in the European Union in the period 2018-2025 (kg / inhabitant)

Source: [4]

According to official data published by Eurostat, in the EU's main sheep-breeding countries in the analyzed period, sales prices fluctuated from one year to the next. In 2016, a sales price of EUR 672.3 per 100 kg of live weight was recorded in France. This price was the highest of all the prices in the main European Union sheep breeding countries. The lowest prices were recorded in Romania (87.74 EUR per 100 kg live weight) and in Spain (52.8 EUR per 100 kg live weight).

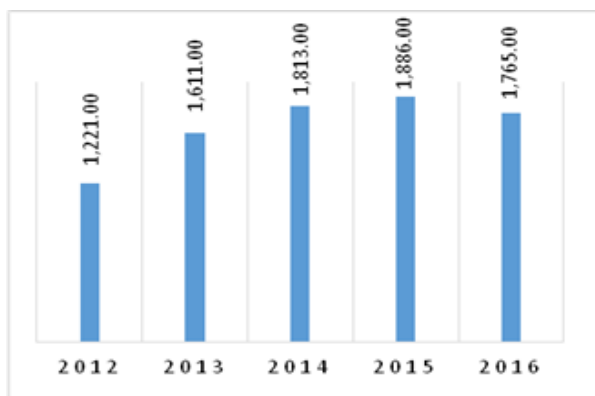


Fig.10. Export of sheep in the European Union, 2012-2016 (thousands of heads)

Source: [10]

The export of sheep in the period 2012-2016 varied from one year to the next. In 2015, the European Union exported the largest number of sheep (1,886 thousand heads), and the smallest sheep export was 1,221 thousand heads (2012) (Fig.10) [10].

A negative contribution to the EU economy had its net exports of sheep and lamb meat during 2011-2016. During the analyzed period there is a major imbalance between imports and exports of sheep and lamb meat. [8]

During this period, the quantitative imports of sheep and lamb have outpaced the quantitative exports. Net exports for this meat category varied between 2011 (-264.89 thousand tonnes) and 2016 (-283.47 thousand tonnes) (Fig.11).

At the level of 2015, European Union exports of sheep were 61,000 tonnes, of which half were live animals [12].

In 2016, the world's main exporters of meat and sheep and goat meat products were: New Zealand; Australia; European Union; India; Uruguay; United States, etc.

From the data presented, it can easily be noticed that the European Union ranks third among the world's largest exporters for meat and sheep and goat meat products.

The world's leading importers of meat and sheep and goat meat products for the year 2016 were: China and Hong Kong, European Union, United States, Malaysia, Japan, etc [4].

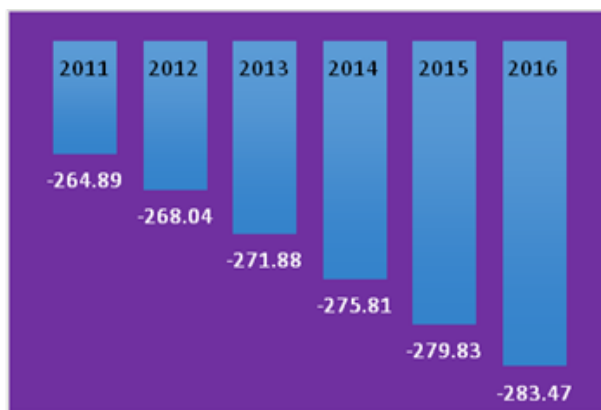


Fig.11. Net exports of lamb & mutton in the European Union, 2011-2016 (thousand tons)

Source: [4]

For the 2018-2025 period, a negative trend for the net exports of lamb & mutton is foreseen at the EU level (Fig. 12).

Currently, in the European Union, the sheep meat production and marketing sector is a fragile sector. In this context, it is necessary to adopt a strategy that envisages an active policy for the production of sheep meat for a longer period. This strategy is vital, especially for the

better capitalization and conservation of land at the level of the European Union [7].

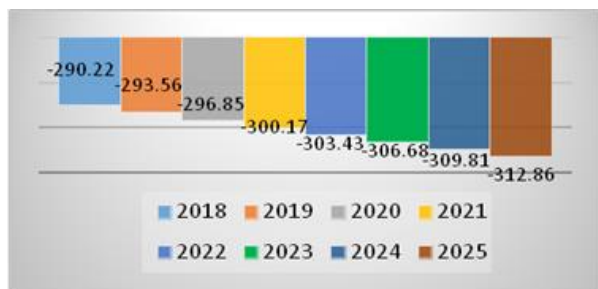


Fig.12. Forecasts of net exports of lamb & mutton in the European Union in the period 2018-2025 (thousand tons)

Source: [4,12]

CONCLUSIONS

Following the analysis of the lamb and mutton market at the European Union level, we can see the following:

- the largest sheep flock in the European Union in the analyzed period was recorded in 2011 (98.6 million heads);
- the largest herds of sheep registered in 2016, were in: United Kingdom; Spain; Romania; Greece; Italy and France;
- the largest production of lamb & mutton was 1,053.64 thousand tons (2016);
- the highest total consumption of lamb & mutton was 1,337.11 thousand tons (2016), and the lowest consumption was 1,296.98 thousand tons (2011);
- the consumption per capita of lamb & mutton increased in 2016, by 2.31% compared to 2011;
- In 2016, France recorded the highest sale price for sheep (672.3 EUR per 100 kilograms live weight), of the main sheep-breeding countries;
- in terms of sheep export, in 2015 was recorded the most significant export (1,886 thousand heads);
- In 2011-2016, at EU level, the imports of lamb & mutton were superior to exports.

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