

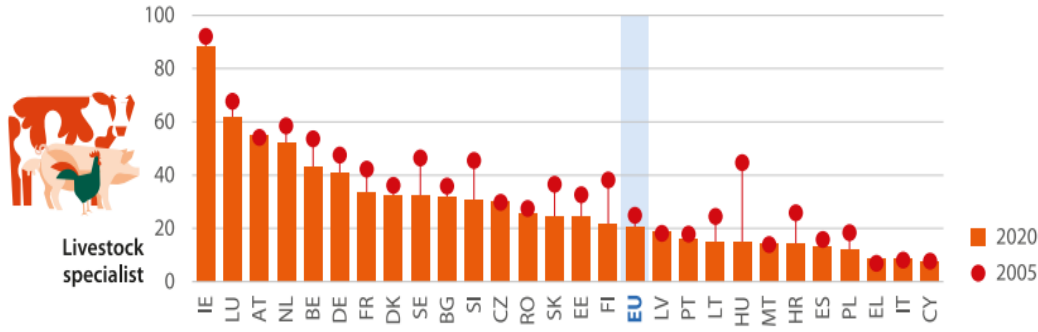


Market situation and income support for EU Sheep & Goat Meats

DG AGRI European Commission

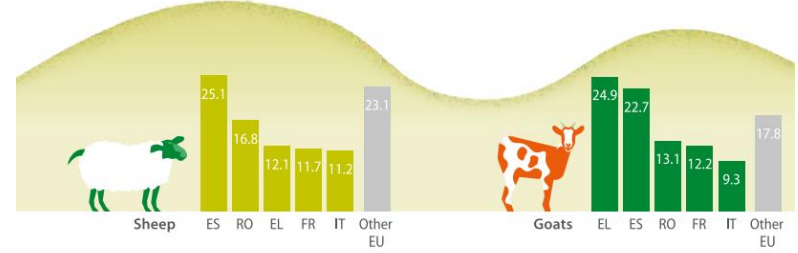
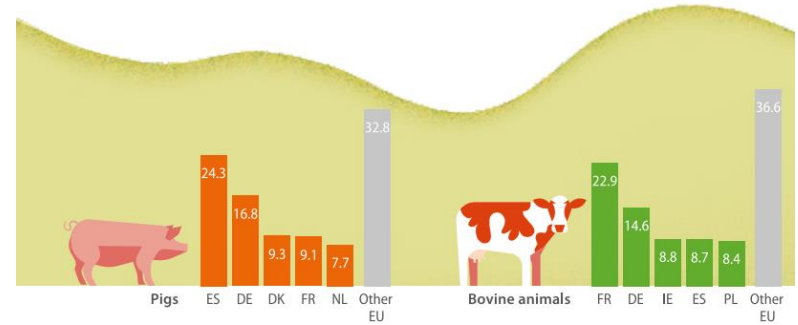
***Annual conference sheep/goat farmers 2023
12th October -Tartu, Estonia***

EU livestock population

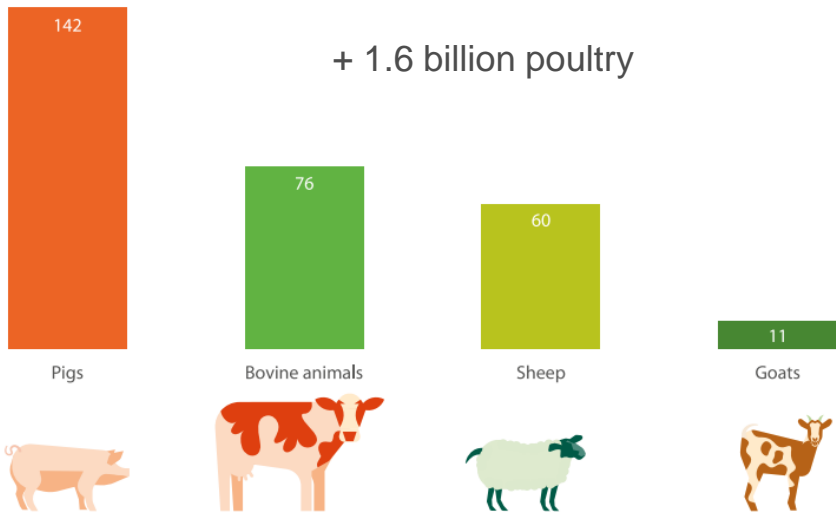


Share of specialist livestock farms on total farms

Share of EU livestock populations (% based on head of animals, 2021)

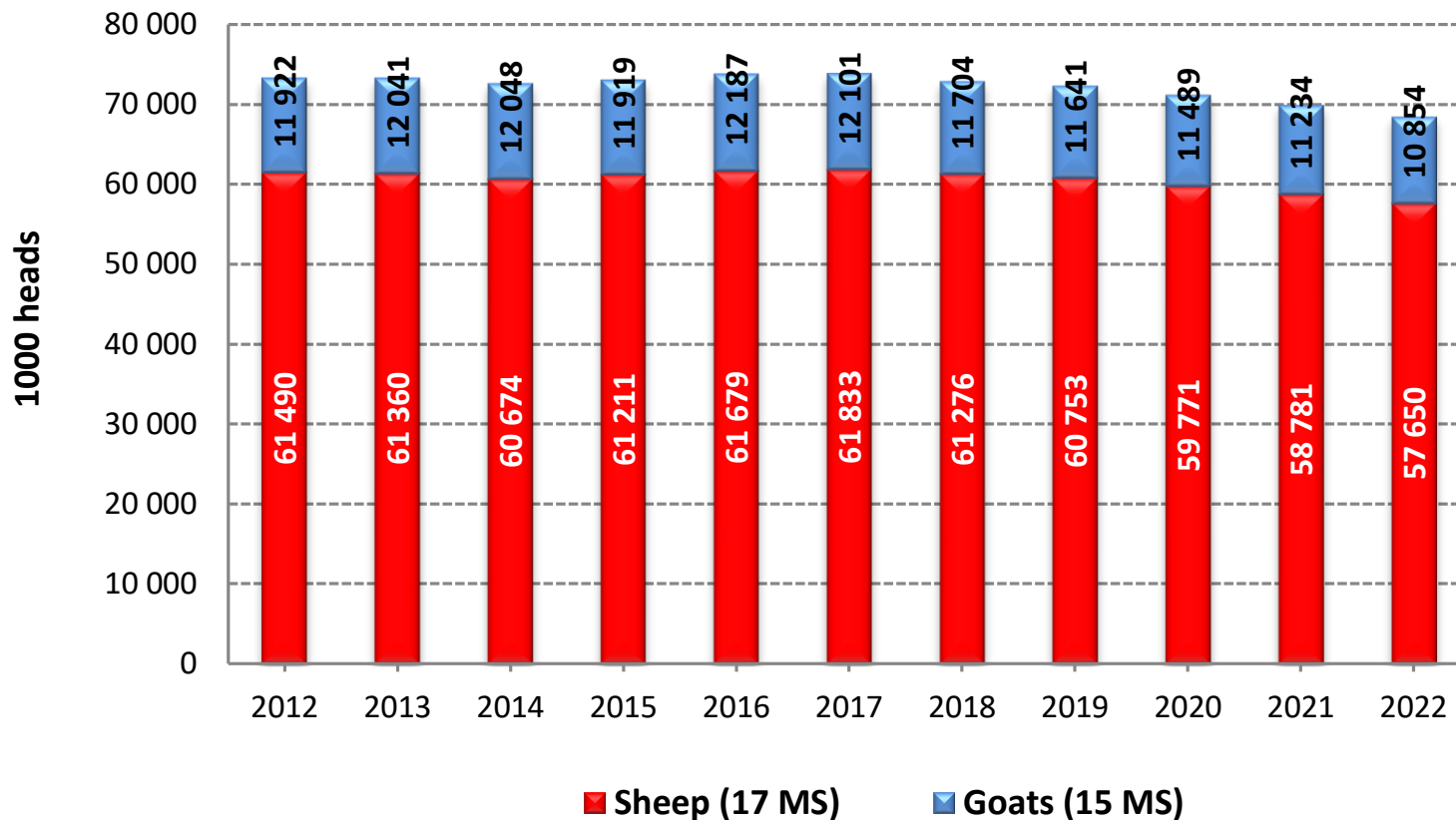


Livestock populations (million head, EU, 2021)



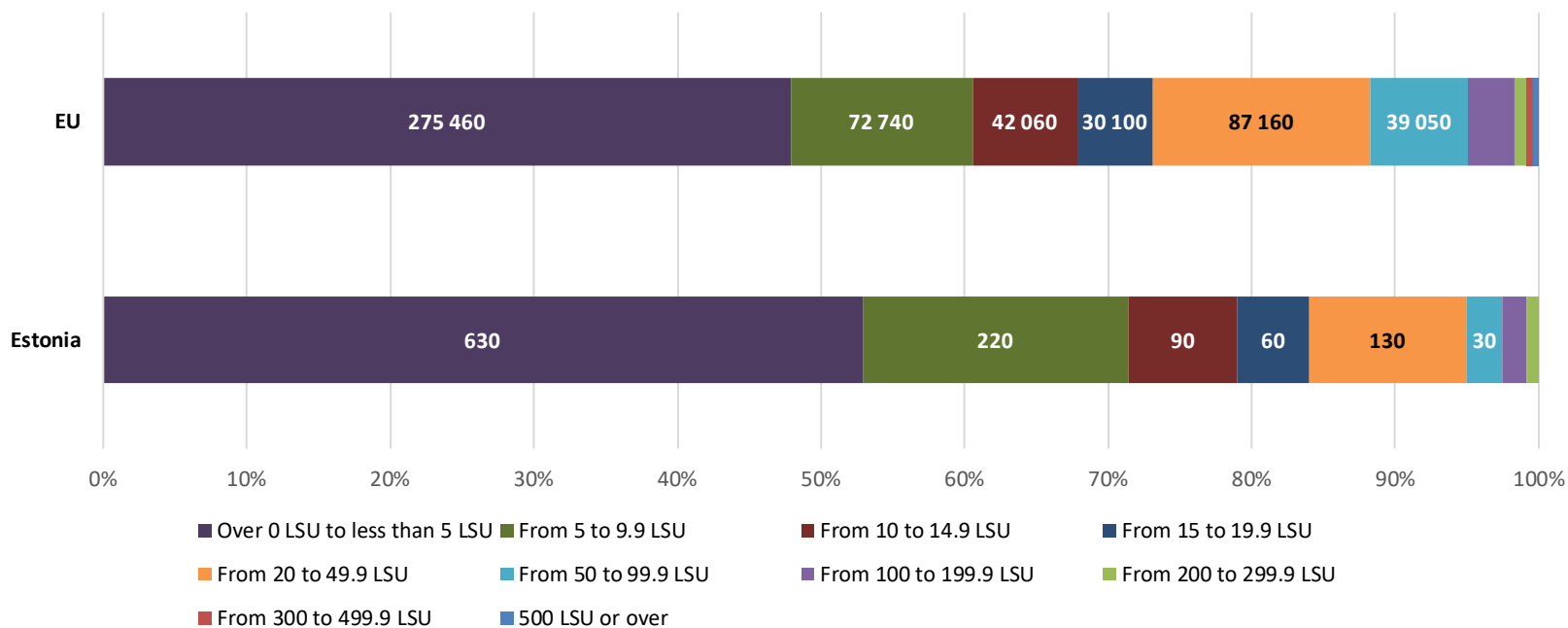
Sources : EUROSTAT

Evolution EU Sheep & goat herd December 2022



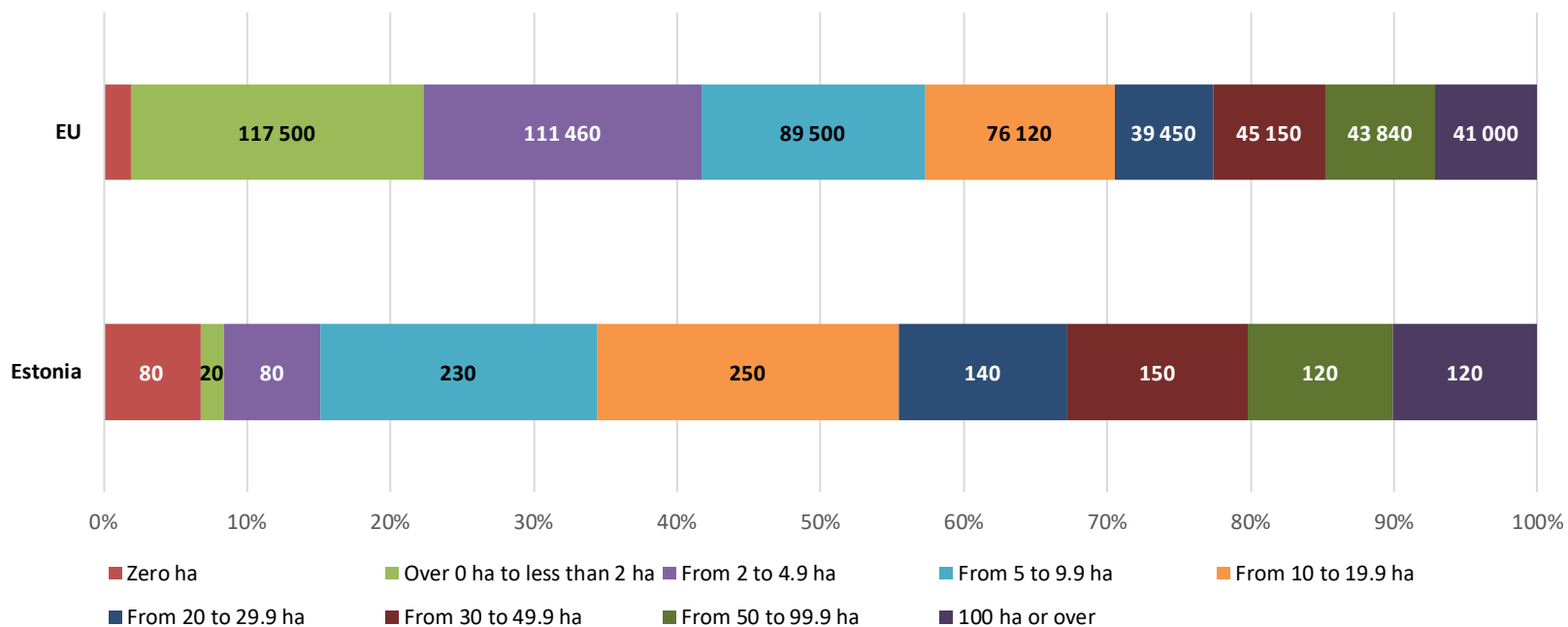
SHEEP FARM STRUCTURE

Sheep Farm Structure Survey 2020
per farm size
Estonia / EU
Holding numbers

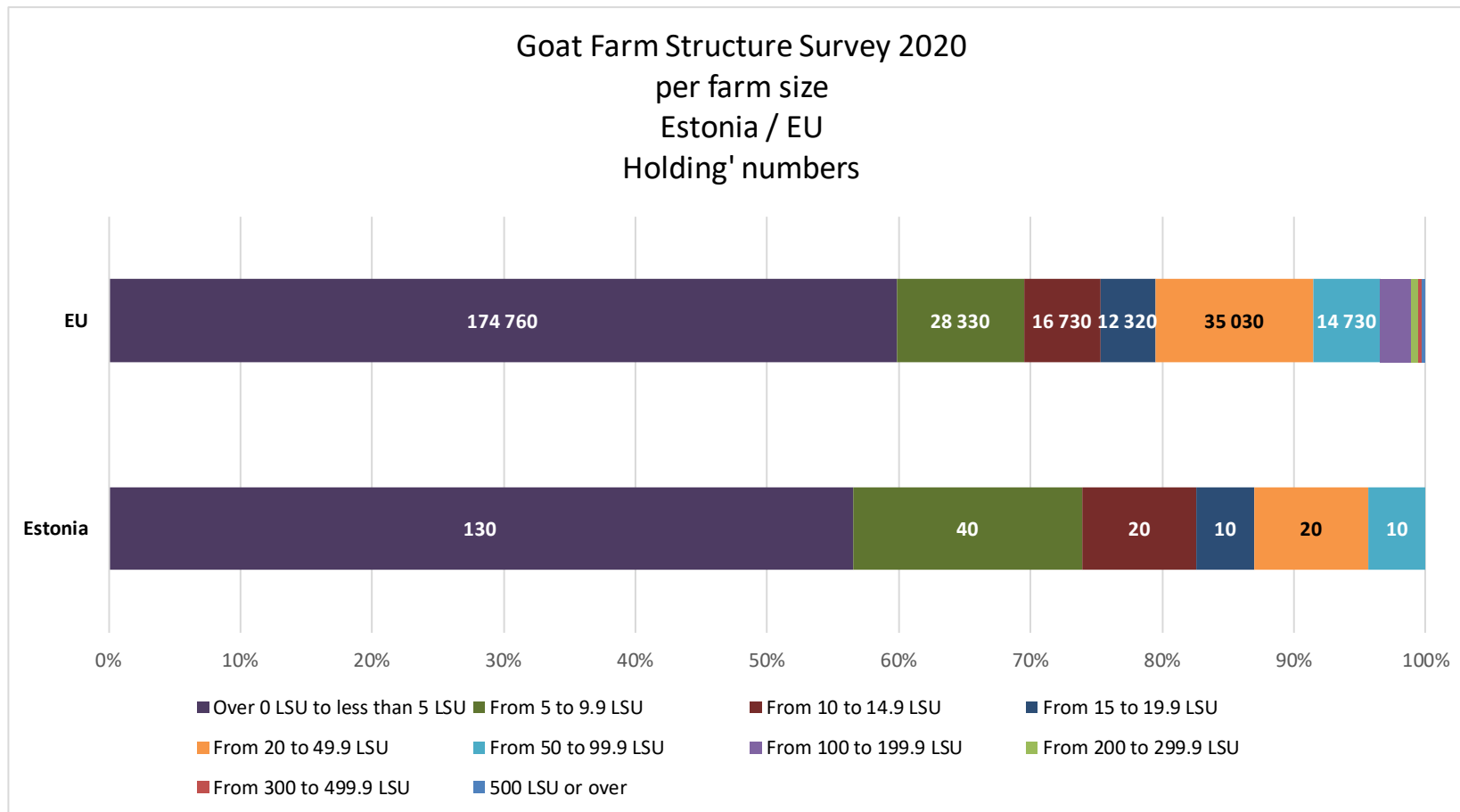


SHEEP FARM STRUCTURE

Sheep Farm Structure Survey 2020
per utilised agricultural area
Estonia / EU
Holding numbers

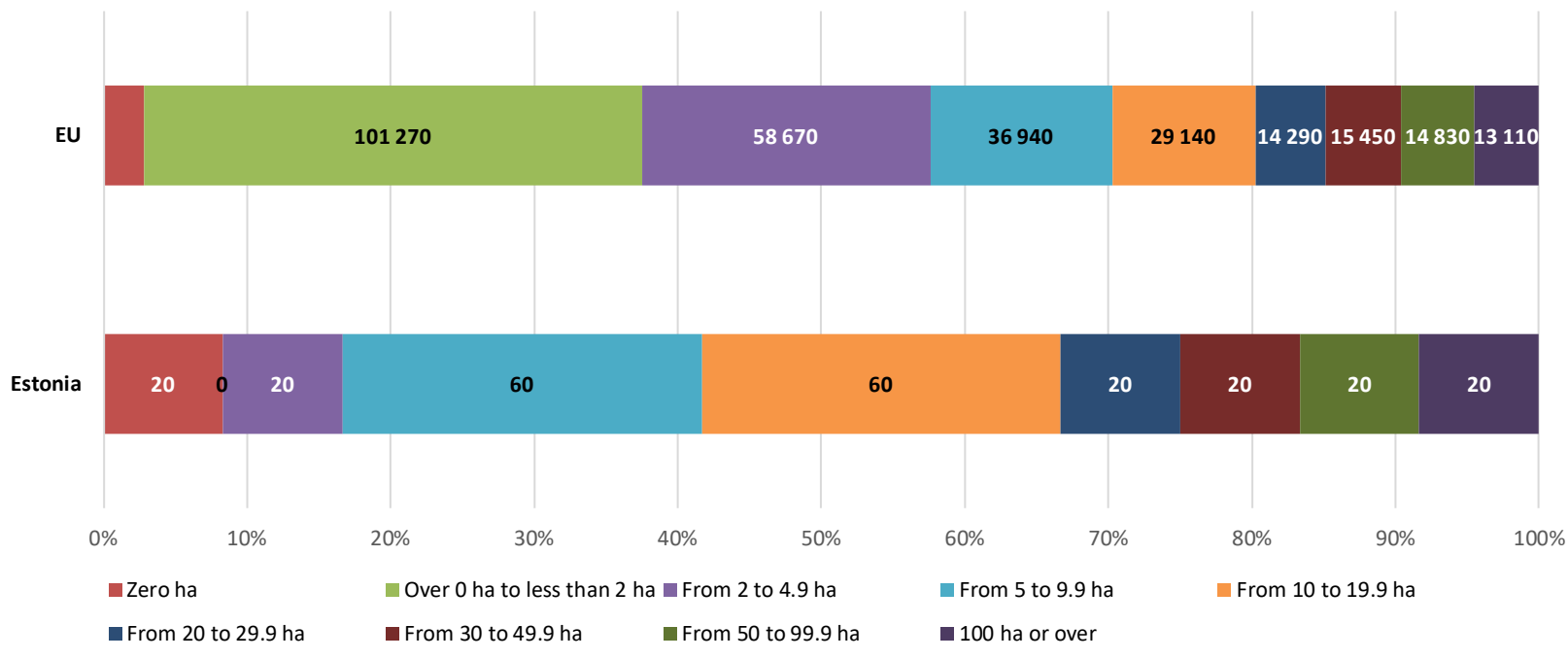


GOAT FARM STRUCTURE



GOAT FARM STRUCTURE

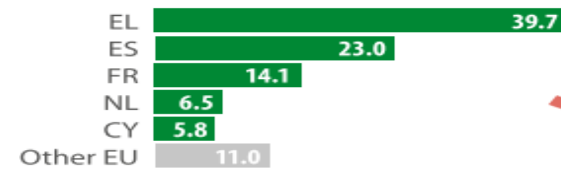
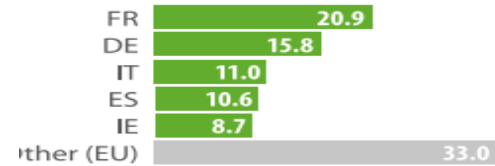
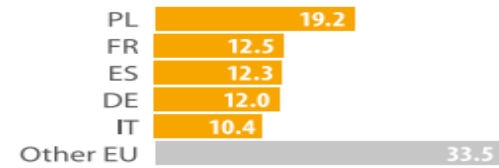
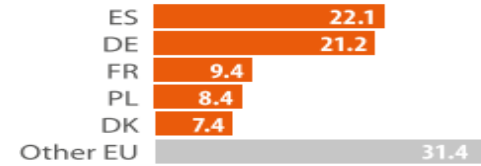
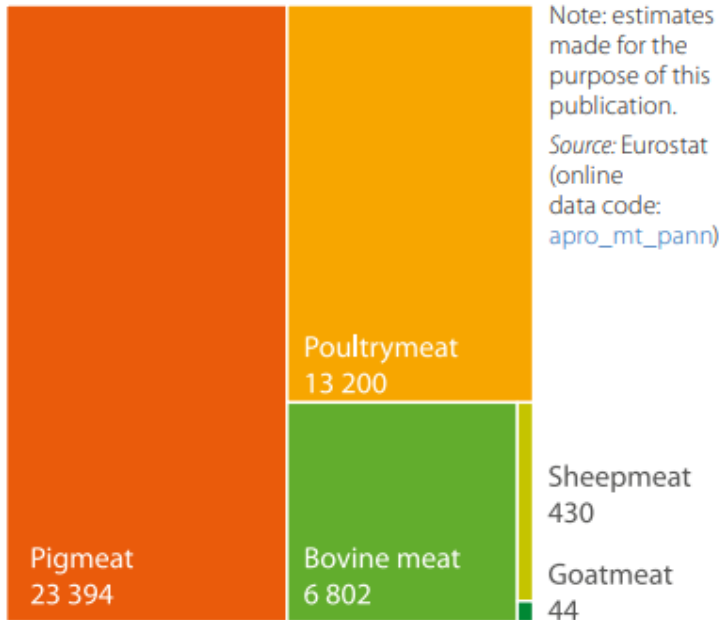
Goat Farm Structure Survey 2020
per utilised agricultural area
Estonia / EU
Holding numbers



EU meat production

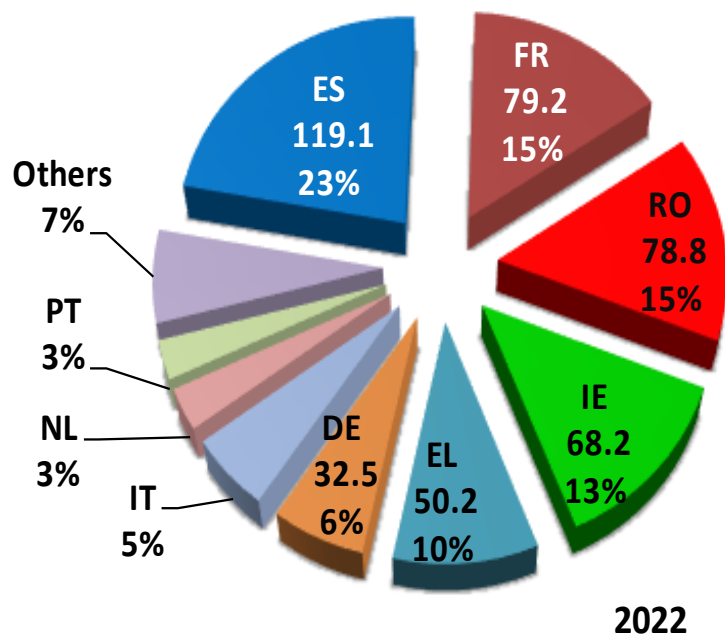
Meat production

(thousand tonnes, EU, 2021)

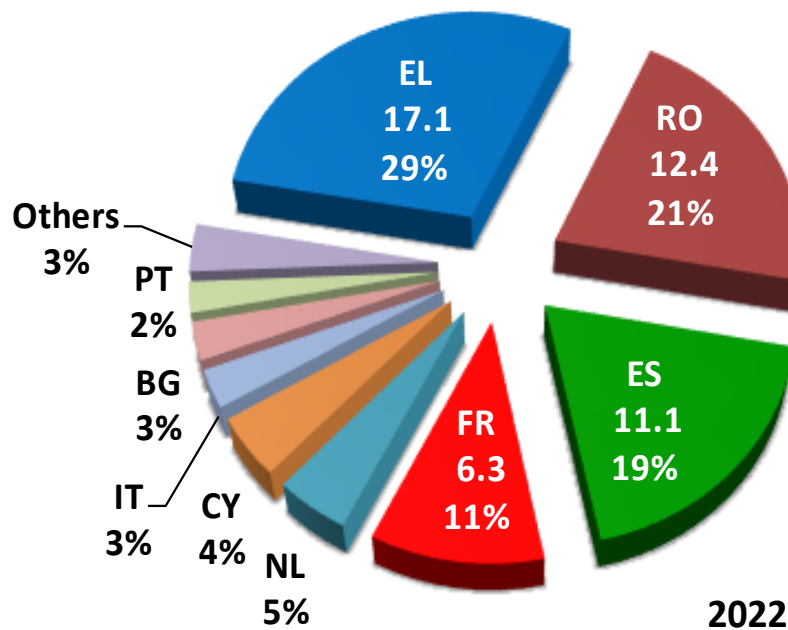


PRODUCTION

EU Sheep Meat Producers
('000 tonnes)

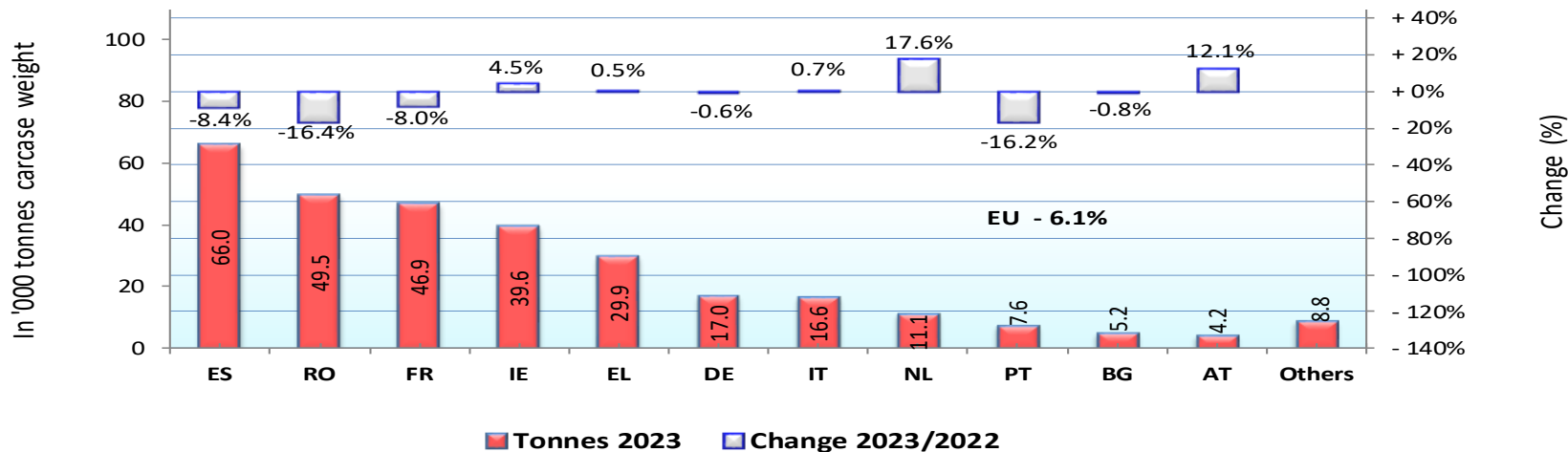


EU Goat Meat Producers
('000 tonnes)

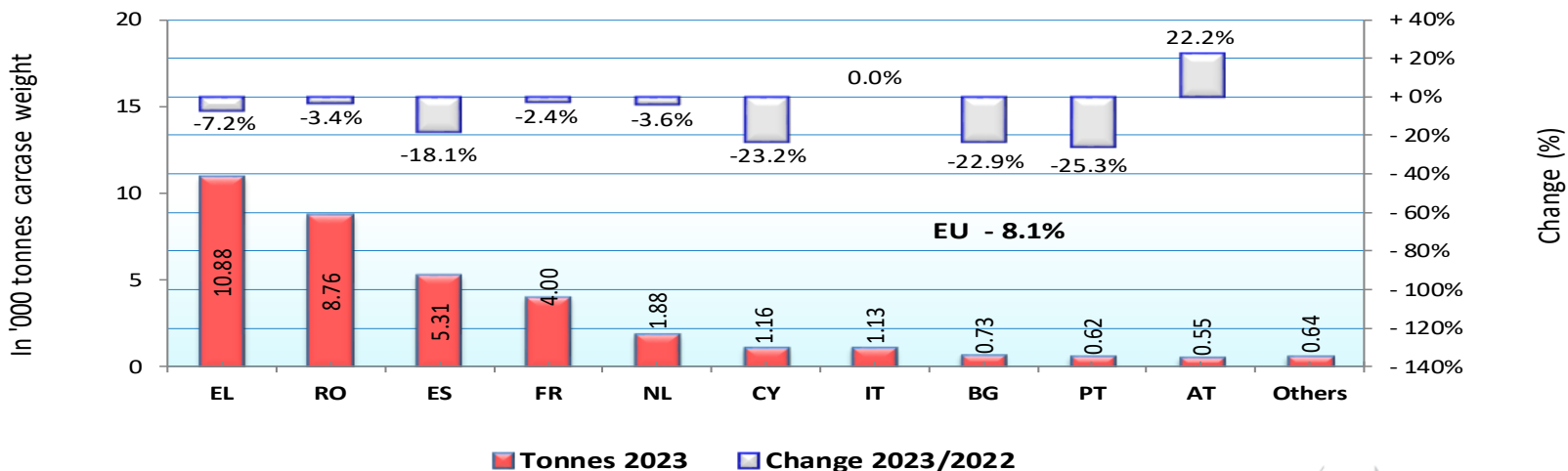


■ ES ■ FR ■ RO ■ IE ■ EL ■ DE ■ IT ■ NL ■ PT ■ Others ■ EL ■ RO ■ ES ■ FR ■ NL ■ CY ■ IT ■ BG ■ PT ■ Others

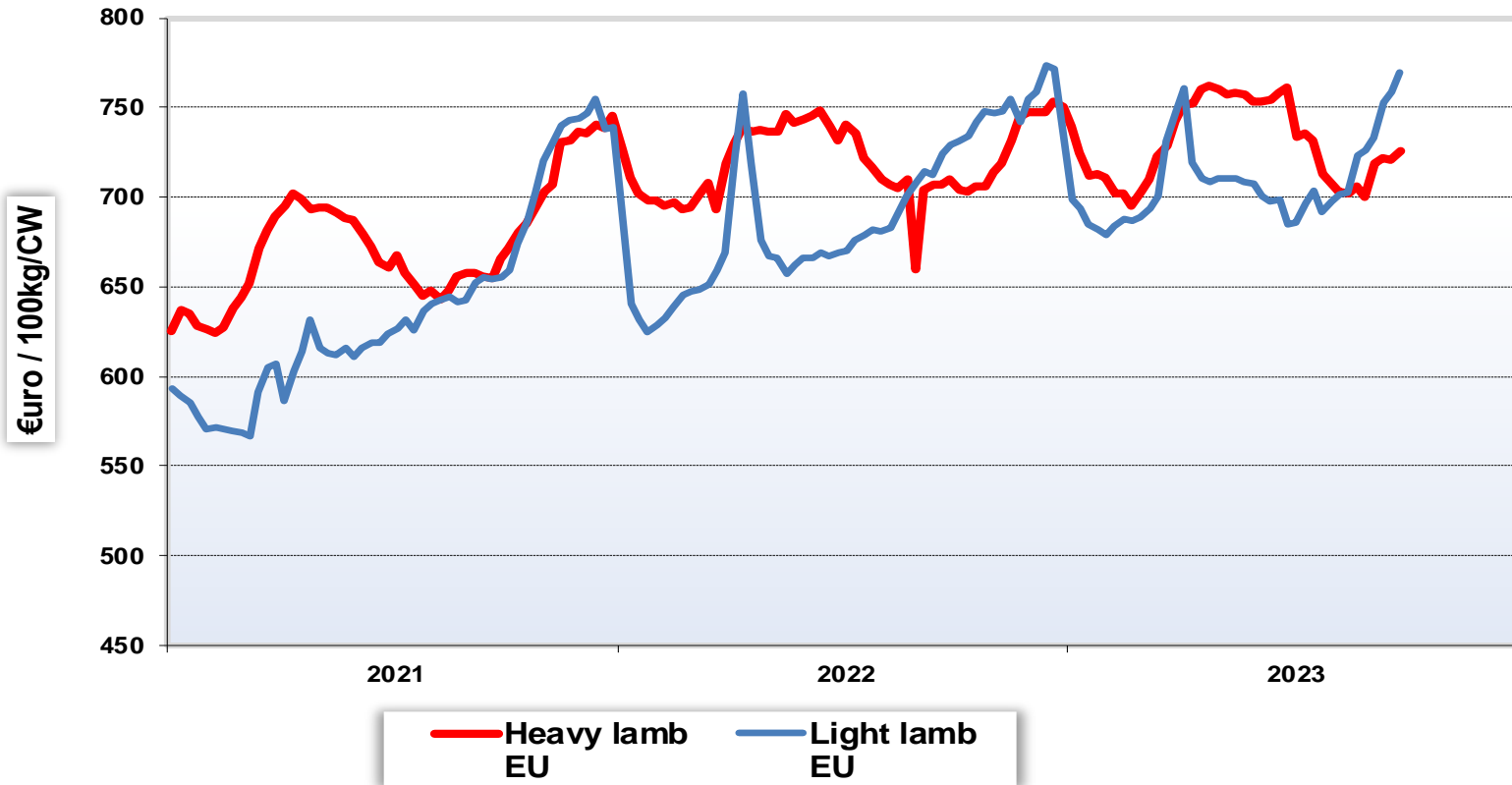
Sheep slaughtering for EU 2023/2022 (up to July)



Goat slaughtering for EU 2023/2022 (up to July)



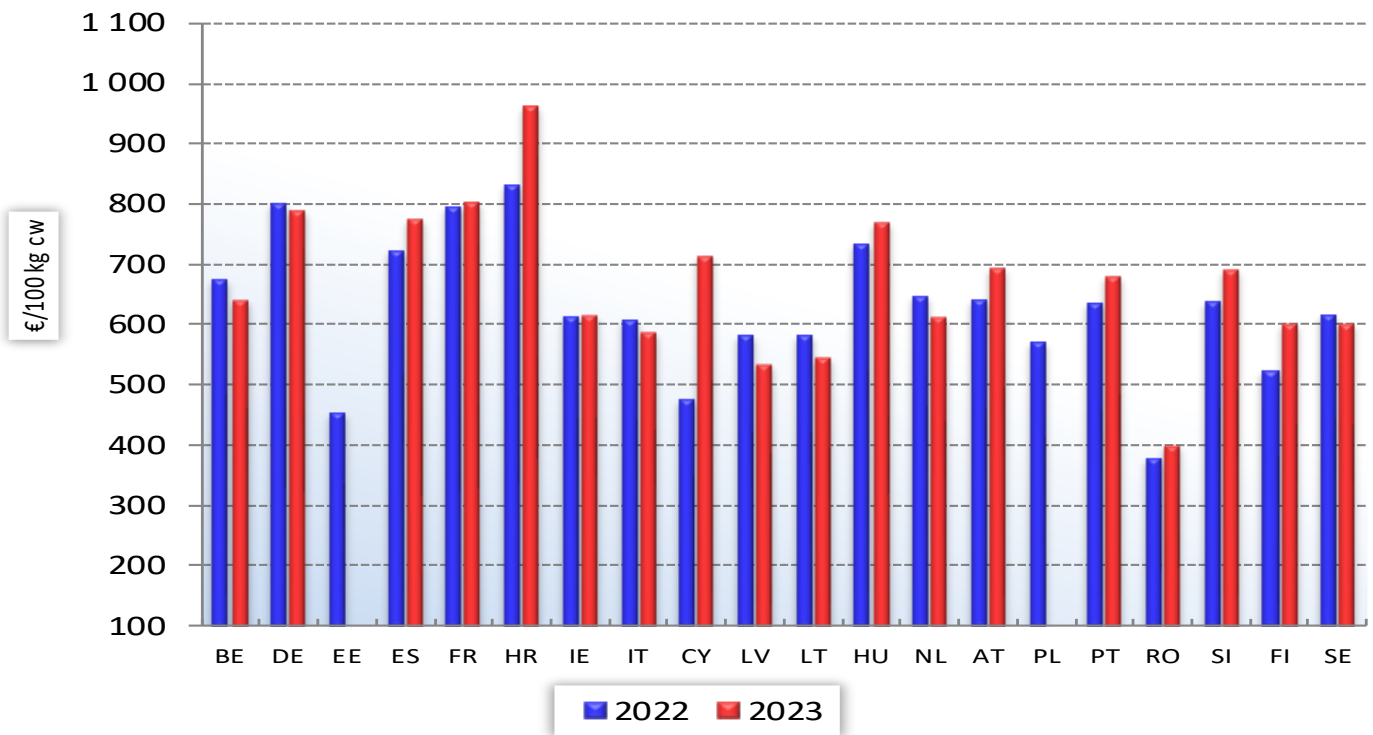
Evolution of EU lamb prices



HEAVY LAMB PRICES

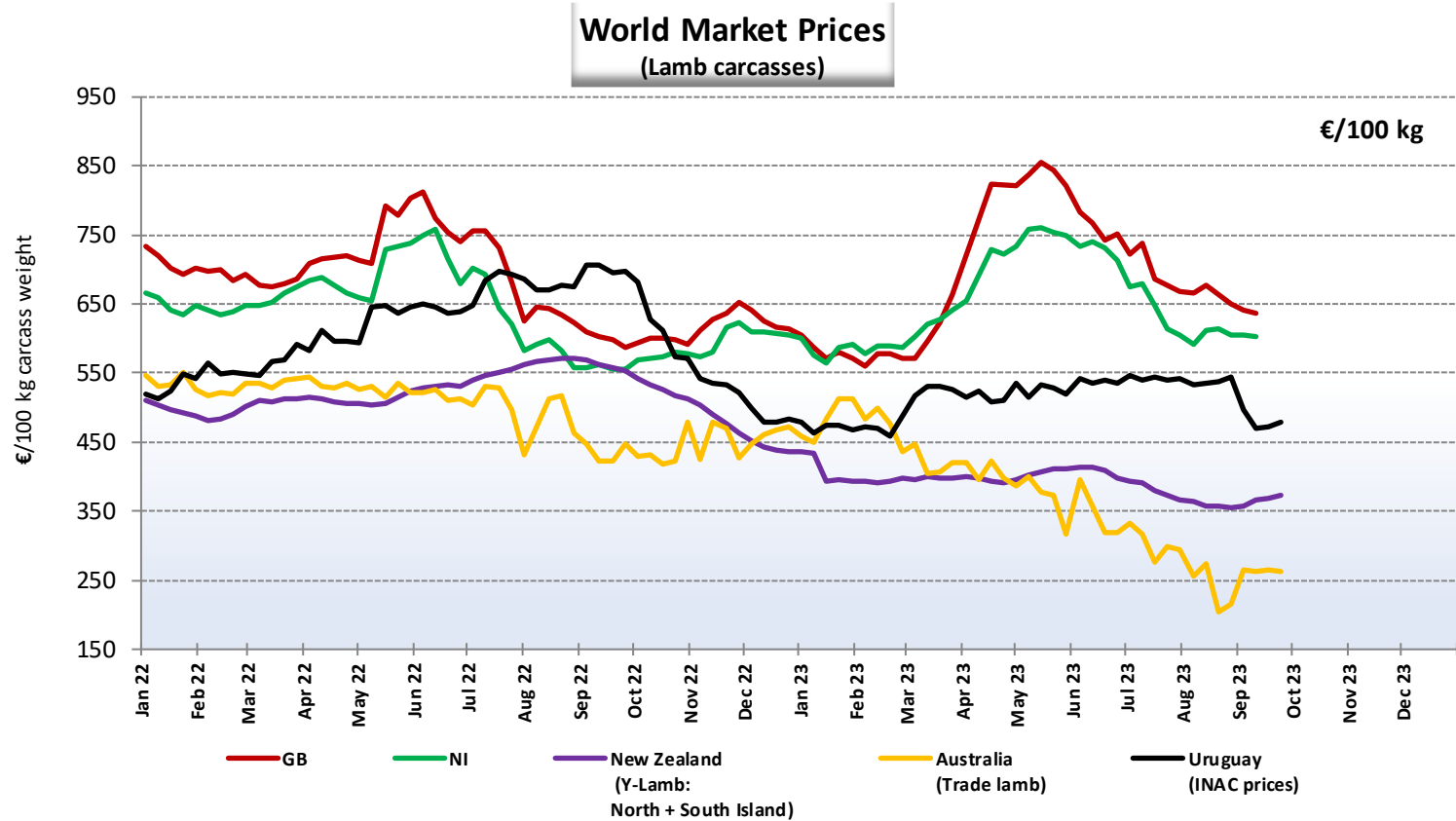
EU MEMBER STATES

Heavy lamb prices
week 39



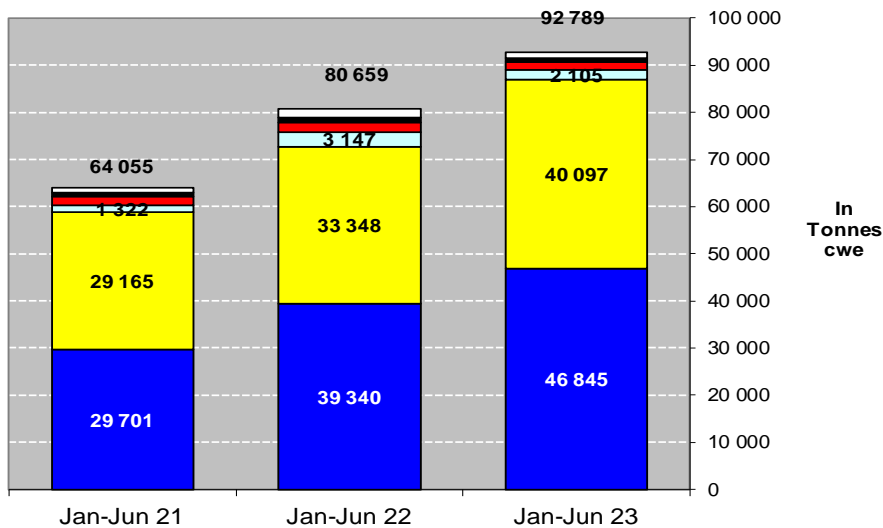
Heavy lambs prices of September 2023 compared to

	BE	DE	IE	ES	FR	HR	IT	CY	LV	LT	HU	NL	AT	PL	PT	RO	SI	FI	SE	EU
August 2023	-0.4%	-2.8%	-0.7%	+10.2%	-0.0%	+1.0%	+1.3%	-1.4%	-2.5%	-5.4%	+0.6%	-0.4%	+1.5%	-1.3%	+11.5%	+28.3%	-2.4%	+3.8%	-8.4%	+2.2%
September 2022	-3.1%	+1.3%	+0.6%	+5.0%	+0.3%	+25.6%	-6.0%	+51.1%	-4.1%	+2.6%	+6.7%	-1.3%	+6.0%	+13.1%	-8.2%	+17.5%	+11.3%	+20.6%	-8.6%	+1.7%



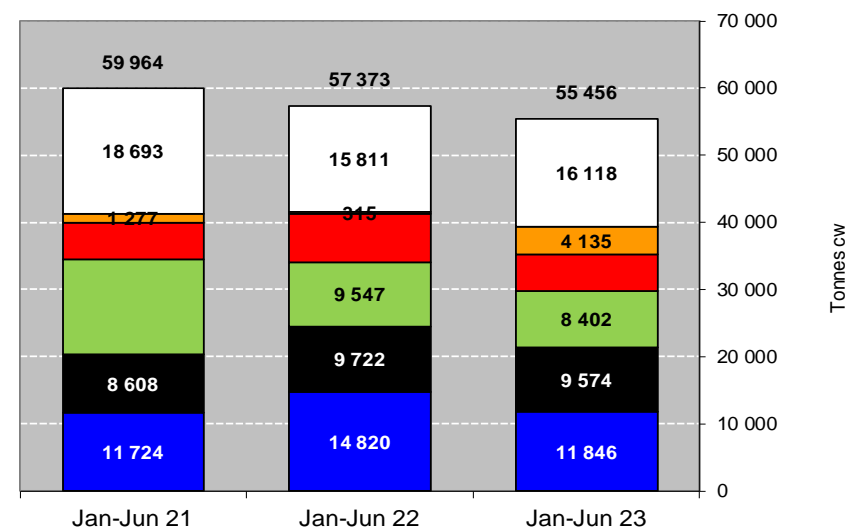
sheep & goatmeat and live animals Trade figures (COMEXT)

EU IMPORTS of Sheep & Goat (Tonnes cwe)



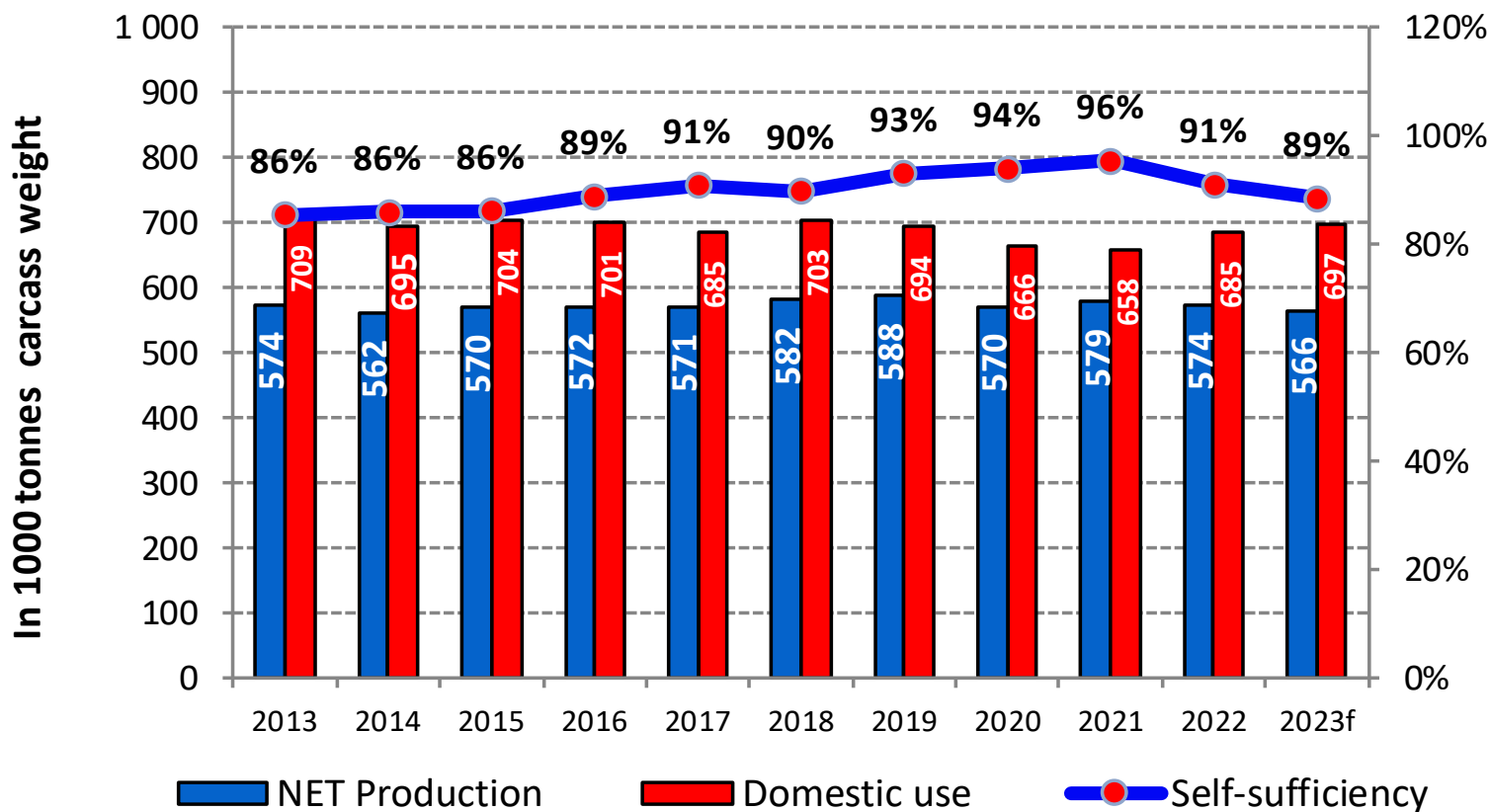
■ United Kingdom ■ New Zealand □ Australia ■ North Macedonia ■ Argentina □ Other origins

EU EXPORTS of Sheep & Goat (Tonnes cwe)



■ Jordan ■ United Kingdom ■ Saudi Arabia ■ Israel ■ Libya □ Other destinations

EU balance on sheep & goat meat (f = Forecast estimated by DG AGRI)



Follow market updates via the EU Dashboard

http://ec.europa.eu/agriculture/dashboards/index_en.htm

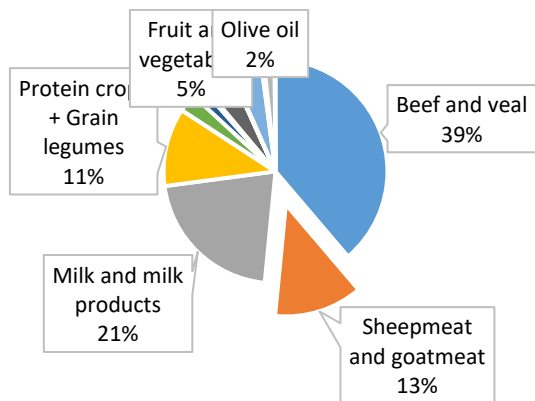
CAP income support for sheep and goat farmers in the EU under the SPR

- Basic income support and related decoupled payments (Chapter II, Section 2);
- Complementary income support for young farmers (Article 30);
- Eco-schemes (Article 31);
- Payments for areas under Natural constraints (Article 71);
- Coupled income support – CIS (Chapter II, Section 3);

- In addition, sheep and goat farmers can benefit from other types of CAP supports (sectorial interventions, AECC, organic farming, animal welfare, investments, training, etc.) and other supports.

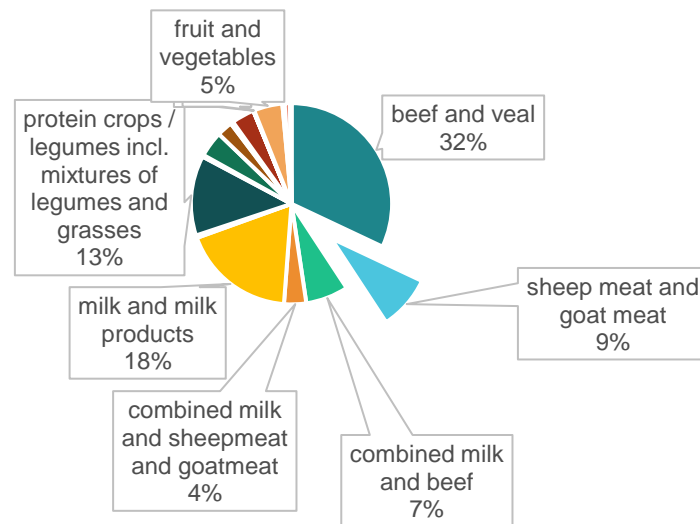
Financial allocations for coupled support in the EU

VCS 2022 (total: EUR 4,2 billion):



- Beef and veal
- Milk and milk products
- Oilseeds
- Rice
- Sugar beet
- Sheepmeat and goatmeat
- Protein crops + Grain legumes
- Cereals
- Starch potato
- Flax

CIS 2023-2027 (average total per year: EUR 4,6 billion):

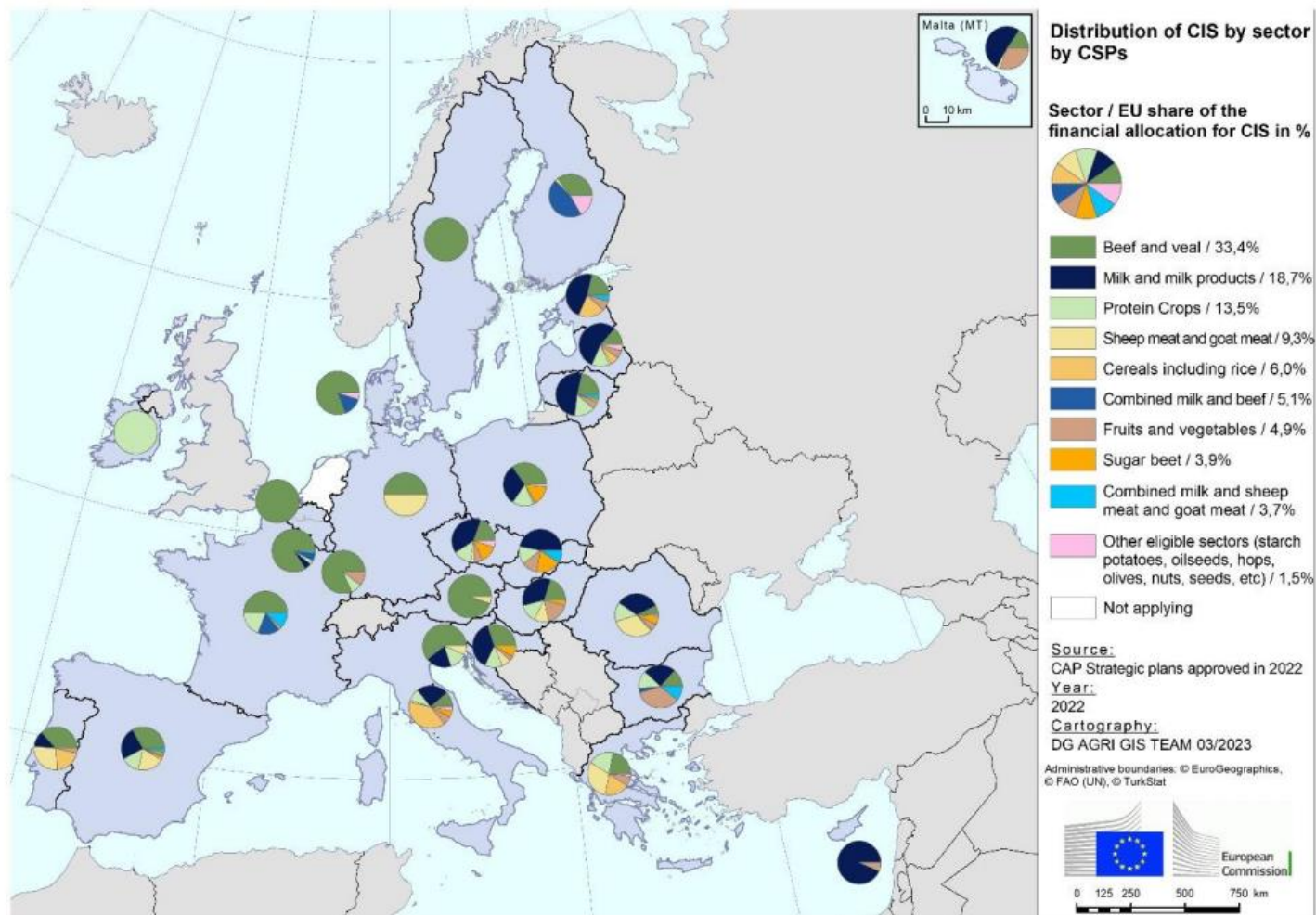


- beef and veal
- sheep meat and goat meat
- combined milk and beef
- combined milk and sheepmeat and goatmeat
- milk and milk products
- various crops
- protein crops / legumes incl. mixtures of legumes and grasses
- oilseeds
- cereals (excl. rice)
- rice
- starch potatoes
- sugar beet(, cane and chicory roots)
- flax
- hemp
- hops
- fruit and vegetables
- nuts
- olive oil and table olives
- seeds
- short rotation coppice

CIS for sheep and goat in the EU

- In terms of unit amounts – it varies between MS: from EUR 10 or less in HR, CY, IT) to EUR 100 or more in specific cases in AT and FI;
- In terms of outputs, MS with the biggest numbers of sheep and goat to be supported under CIS: mostly Mediterranean countries (ES, EL, FR, PT), also RO and DE.
- Requirements for the support often include:
 - Minimum and maximum number of animals per farm;
 - Minimum animal age.

Distribution of CIS support per Member State



CIS for sheep and goat in Estonia

- A combined intervention for female ewes and goats (milk and sheepmeat and goatmeat sector combined);
- Compared to the previous period:
 - significantly increased support for sheep and goat;
 - Increase in maximum number of animals supported per farm and in minimum animal age requirements.

Other CAP income support for sheep and goat in Estonia

- Decoupled direct payments (BISS and additional CRISS for the first 130 ha);
- Eco-schemes (e.g. organic farming for grasslands with at least 0,2 LU/ha);
- Complementary support for young farmers (for the first 100 ha);
- Other types of support for sheep and goat farmers in Estonia:
 - RD support: AECC (e.g. endangered species, animal health, organic livestock premium, maintenance of valuable grasslands), investments, including fencing from predators, Agricultural insurance premiums, AKIS, etc.;
 - Transitional national aid (Transitional ewe rearing premium and ewe allowance).



Many thanks

Any Questions?