

THE KEY DATA
OF IDELE



French sheep 2024

Milk and meat production



THE PRODUCTION STRUCTURE IN FRANCE

EVOLUTION OF THE NUMBER OF FARMS IN FRANCE (INCLUDING OVERSEA DEPARTMENTS)

Source: SSP - November livestock surveys and 2000, 2010 and 2020 agricultural census*

Farms	2000	2010	2021	2022	2023
Having sheep	95,700	56,505	34,541	32,351	29,982
Having meat ewes	89,768	50,451	28,826	27,237	24,828
Having dairy ewes	6,070	5,494	4,974	4,398	4,329

* Farms that keep more than 10 sheep or have a lamb fattening capacity of more than 100.

AGE OF FRENCH SHEEP BREEDERS IN 2020

Source: Agreste agricultural census, processed by Institut de l'Élevage

Age of the farm manager	Meat ewes		Dairy ewes	
	% of farmers	% of ewes	% of farmers	% of ewes
Less than 40 years old	28%	28%	28%	28%
40-49 years old	22%	22%	26%	26%
50 years old and more	50%	50%	46%	46%
<i>including 55 years old and more</i>	36%	35%	30%	30%

DISTRIBUTION OF LIVESTOCK AND FARMS WITH MEAT EWES ACCORDING TO FLOCK SIZE

Source: BDNi count as of 01/01/2023 - Continental France

	Number of farms	% of total	Number of meat ewes	% of total
1 to 49 ewes	49,277	76%	489,333	12%
50 to 149 ewes	7,812	12%	671,431	17%
150 to 299 ewes	3,749	6%	800,316	20%
300 to 499 ewes	2,146	3%	816,554	21%
500 to 999 ewes	1,213	2%	793,541	20%
> 1,000 ewes	246	1%	368,117	10%

DISTRIBUTION OF LIVESTOCK AND FARMS HOLDING DAIRY EWES ACCORDING TO HERD SIZE

Source: BDNi count as of 01/01/2023 - Continental France

	Number of farms	% of total	Number of milk ewes	% of total
1 to 49 ewes	1,794	30%	19,641	1%
50 to 149 ewes	775	13%	72,844	5%
150 to 299 ewes	1,101	18%	251,827	17%
300 to 499 ewes	1,533	25%	591,649	39%
> 500 ewes	865	14%	588,711	39%

In France, [agricultural censuses](#) take place every 10 years (the last one was in 2020). These exhaustive surveys carried out on farms throughout the country then constitute a complete snapshot of French agriculture. Between two agricultural censuses, "structural surveys" are carried out on a smaller sample of farms in order to update the data related to the farm structures. The [results of the annual livestock surveys](#) also provide information concerning the evolution of the livestock and the number of farms.

THE FRENCH SHEEP FLOCK

EVOLUTION OF THE FLOCK (1,000 HEAD)

Source: SSP

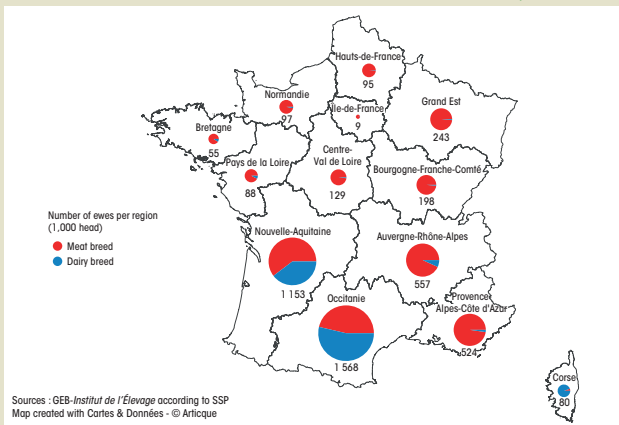
November livestock surveys	1998	2008	2021	2022	2023
Total sheep	9,553	7,715	6,995	6,598	6,576
Ewes and ewe lambs put to the ram	7,502	5,888	5,138	4,833	4,804
• Meat ewes	5,866	4,300	3,577	3,348	3,355
• Dairy ewes	1,636	1,588	1,560	1,485	1,449

REGIONAL DISTRIBUTION OF FRENCH BREEDING LIVESTOCK IN NOVEMBER 2023

Source: SSP (Livestock survey 2023)

Meat ewes and ewe lambs put to the ram			Dairy ewes and ewe lambs put to the ram		
Regions	1,000 heads	% France	Regions	1,000 heads	% France
Occitanie	727	22%	Occitanie	842	58%
Nouvelle Aquitaine	696	21%	Nouvelle Aquitaine	457	32%
Auvergne-Rhône-Alpes	519	15%	Corse	76	5%
PACA	512	15%	Auvergne-Rhône-Alpes	38	3%
Grand Est	240	7%	PACA	12	1%
Bourgogne-Franche-Comté	195	6%			

REGIONAL FLOCKS OF EWES AND EWELAMBS PUT TO THE RAM IN NOV. 2023 (1,000 HEAD)



SHEEPMET IN FRANCE

■ SLAUGHTERINGS

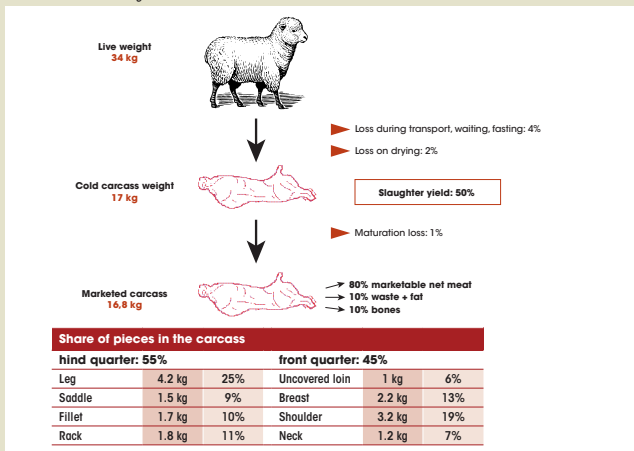
DISTRIBUTION OF CONTROLLED SLAUGHTERING OF SHEEP

Source: SSP

	1,000 heads		1,000 t carcass weight equivalent (cwe)		Average carcass weight (kg)	
	2022	2023	2022	2023	2022	2023
Lambs	3,508	3,217	64	59	18.4	18.4
Adult sheep	554	516	15	14	26.8	26.5
TOTAL	4,061	3,733	79	73	-	-

FROM LAMB TO PLATE

Source: Institut de l'Élevage



ORGANISATION OF FRENCH SHEEPMET PRODUCTION IN 2023

Source: Institut de l'Élevage estimates based on la Coopération Agricole and FNO

	Commercial producer organisations	Non-commercial producer organisations
Number of producer organisations	33	9
Number of members	7,914	1,015
Number of ewes held	1,555,001	336,000
Share of lambs sold by French farms	54%	>10%

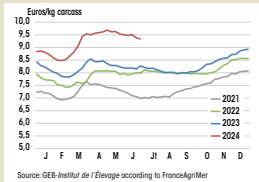
■ PRODUCER PRICES AND PRODUCTION COSTS

AVERAGE PRODUCER PRICE OF LAMBS (€/KG CARCASS WEIGHT)

Source: FranceAgriMer

	2022	2023
Average producer price	7.98	8.26
Average price index, weighted by price in 2015	126.3	130.6

French lamb average producer price



AGRICULTURAL MEANS OF PRODUCTION PURCHASING PRICE INDEX (IPAMPA)

Source: Institut de l'Élevage

Level 100 in Jan. 2015	2022	2023	May 2024
Sheepmeat IPAMPA	134.1	134.5	130.1
Purchased feed index (22% of the sheepmeat IPAMPA)	143.8	143.5	129.9
Energy and lubricants' index (8% of the sheepmeat IPAMPA)	179.5	168.6	158.5

■ TRADE IN LIVE SHEEP (EXCLUDING BREEDING STOCK)

FRENCH IMPORTS OF LIVE SHEEP

Source: French customs

By country of origin	Lambs (1,000 head)		Adult sheep (1,000 head)	
	2022	2023	2022	2023
Spain	186	102	24	22
Portugal	0	32	0	0
Netherlands	17	12	0	0
Ireland	7	12	0	1
Germany	1	1	0	0
Hungary	4	0	0	0
Other countries	1	1	2	1
TOTAL	215	160	25	24

FRENCH EXPORTS OF LIVE SHEEP

Source: French customs

Destination	Lambs (1,000 head)		Adult sheep (1,000 head)	
	2022	2023	2022*	2023
Spain	237	294	16	11
Italy	73	71	28	28
Israel	15	13	0	0
Greece	11	16	3	4
Poland	0	0	0	0
Germany	7	10	0	0
Netherlands	5	1	0	0
Lebanon	3	0	1	2
Other countries	5	5	2	7
TOTAL	356	410	50	52

* 2022: errors in Customs' data for exports of adult sheep in Nov. and Dec. 2022, therefore estimates for these 2 months.

■ SHEEPMET TRADE

IMPORTS OF SHEEPMET IN 2023 (1,000 TONNES CWE*)

Source: French customs

Country of origin	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2023/22
	bone-in	boneless	bone-in	boneless		
Ireland	0.3	1.0	13.3	2.8	18	-6%
Spain	0.2	3.3	8.3	0.1	12	+3%
TOTAL EU-27	1.1	5.6	24.8	3.8	35	-2%
New-Zealand	5.0	0.7	4.3	1.1	11	-7%
United Kingdom	1.1	0.8	35.2	0.7	38	+9%
TOTAL third countries	6.6	1.8	36.5	1.5	46	-4%
TOTAL	7.7	7.4	65.1	5.6	86	+2%

* After subtracting the estimated re-export of British sheepmeat.

** Carcass coefficient used = 1.3 for boneless meat.

EXPORTS OF SHEEPMET IN 2023** (1,000 TONNES CWE*)

Source: French customs

Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2023/22
	bone-in	boneless	bone-in	boneless		
Italy**	0.1	0.0	3.5	0.1	4	=
Belgium**	0.1	0.1	1.4	0.2	2	-9%
Germany**	0.0	0.0	0.2	0.1	0	-18%
TOTAL EU-27	1.0	0.5	6.1	0.6	8	-6%
TOTAL	1.2	0.8	7.0	0.6	8	-6%

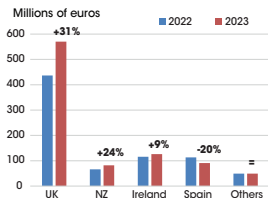
* Carcass coefficient used = 1.3 for boneless meat.

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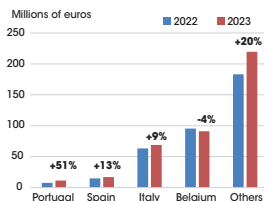
FRENCH TRADE IN VALUE IN 2023 (SHEEPMET AND LIVE SHEEP)

Source: French customs

Imports*: 918 millions of euros



Exports*: 396 millions of euros



* Customs value data include meat imported from the UK and re-exported to other EU-27 countries.

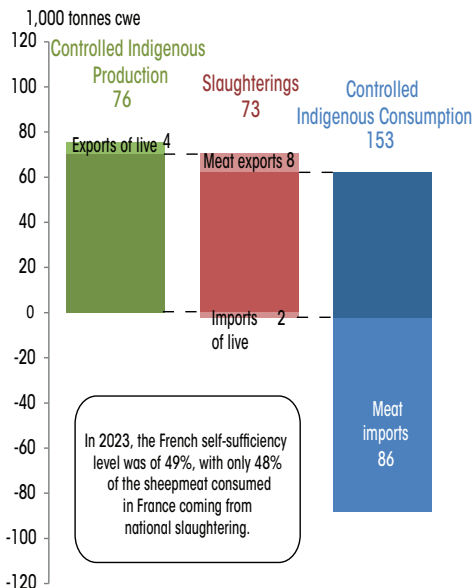
■ FRENCH SHEEPMEEAT BALANCE SHEET

FRENCH SHEEPMEEAT BALANCE SHEET

Source: SSP, French customs

1,000 tonnes cwe	2022	2023
Controlled slaughtering	79	73
- imports of live sheep	3	2
+ exports of live sheep	4	5
= Controlled Indigenous Production	80	76
+ sheepmeat importations*	84	86
- sheepmeat exportations*	8	8
= Controlled Indigenous Consumption	156	153
France's self-sufficiency level in sheepmeat	51%	49%

* Value corrected concerning the British sheepmeat volumes re-exported to other Member States (estimates).

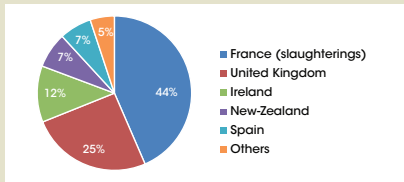


Source: GEB-Institut de l'Élevage, according to SSP and French Customs

■ SHEEPMEAT CONSUMPTION

COUNTRY OF ORIGIN OF THE SHEEPMEAT EATEN IN FRANCE IN 2023

Source: GEB-Institut de l'Élevage according to SSP and French customs



CONTROLLED INDIGENOUS CONSUMPTION OF SHEEPMEAT IN FRANCE

Source: GEB-Institut de l'Élevage according to SSP, Eurostat and IFIP

	Total consumption (1,000 tonnes cwe)		In kg cwe per capita		Slaughterings / Consumption (%)	
	2018	2023	2018	2023	2018	2023
Sheepmeat	164	153	2.4	2.3	50%	48%
Beef	1,560	1,450	23.3	21.3	94%	90%
Goat meat	5	5	0.1	0.1	134%	120%
Pork	2,204	2,087	32.9	30.6	99%	99%
Poultry	1,869	1,978	27.9	29.0	92%	77%
Horse	9	5	0.1	0.1	28%	19%

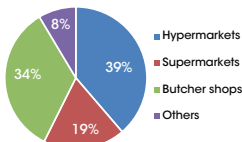
PURCHASES OF LAMB MEAT BY FRENCH HOUSEHOLDS IN 2023

Source: GEB-Institut de l'Élevage according to FranceAgriMer, Panel Kantar

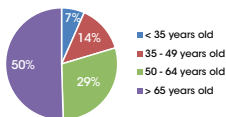
	Evolution 2023/22
Purchased volumes	-2.0%
Retail price	+17.7%

The volumes of lamb purchased by French households in 2023 have fallen again but less significantly than in previous years.

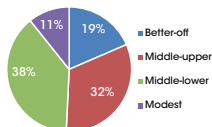
Distribution of household purchases by volume by distribution channel



Distribution of household purchases by volume by age group



Volume distribution of household purchases by income class



SHEEP MILK IN FRANCE

FRENCH COLLECTED SHEEP MILK (MILK CAMPAIGN: FROM NOVEMBER TO OCTOBER)

Source: FranceAgriMer and Interprofessions

In millions of liters	2021-2022	2022-2023	Evolution (%)
Roquefort area	170	171	=
Pyrénées-Atlantiques	65	61	-6%
Corse	6	5	-5%
Other areas	55	59	+8%
TOTAL	296	296	=

PRODUCTION OF SHEEP CHEESE BY THE DAIRY INDUSTRY (DAIRY CAMPAIGN: FROM NOVEMBER TO OCTOBER)

Source: SSP / FranceAgriMer - Monthly dairy survey

In thousands of tonnes	2022	2023	Evolution (%)
Roquefort cheese	18	17	-9%
Uncooked pressed cheeses	18	17	-3%
including Ossau Iraty	5	4	-11%
TOTAL sheep cheeses	61	58	-6%

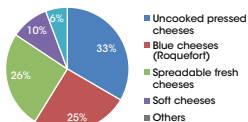
SHEEP MILK IPAMPA (PERIOD: FROM NOVEMBER TO OCTOBER)

Source: Institut de l'Élevage from INSEE and Agreste

Base 100 = 2015	2021-2022	2022-2023	Evolution (%)
Sheep milk IPAMPA	129.8	137.4	+6%
Purchased feed index (27% of sheep milk IPAMPA)	136.0	149.6	+10%
Energy and lubricants index (8% of sheep milk IPAMPA)	160.6	165.4	+3%
Materials Index (20% of sheep milk IPAMPA)	118.4	128.9	+9%

PURCHASES OF SHEEP CHEESE BY FRENCH HOUSEHOLDS IN 2023

Source: Panel Kantar



According to the Kantar panel, for FranceAgriMer, purchases of sheep milk cheeses fell by -5% between 2022 and 2023, with an average price up by +11%. Sales of Roquefort and Ossau-Iraty fell by -3% and -12% respectively while their prices increased by +10% and +15%. Salad cheeses such as feta are doing much better with +2% in volume despite a price increase of +16%... but sales of ultra-fresh products are down by -12% while their selling price has seen the smallest increase (+9%).

THE SHEEP SECTOR IN THE EU AND IN THE WORLD

In 2023, France provided 14% of the EU-27's sheepmeat supply, behind Spain (21%) and Romania (15%).

LIVESTOCK, PRODUCTION AND CONSUMPTION OF SHEEPMEAT IN THE EU IN 2023

Source: Eurostat and *Institut de l'Élevage* estimates

Countries	Breeding livestock* (1,000 head)	Evolution 2023/22	Share of dairy sheep	Slaughterings (1,000 t cwe)	Average carcass weight of lambs (kg)	Consumption (1,000 t cwe)	Self-sufficiency	Annual consumption (kg/cap)
Spain	9,853	-5%	20%	107	11	71	151%	1.5
Romania	8,842	=	88%	76	11	76	100%	4.0
Italy	5,869	-1%	76%	37	8	62	60%	1.1
Greece	5,548	-2%	96%	46	10	48	97%	4.6
France	4,804	-1%	30%	73	18	148	49%	2.2
Ireland	2,600	-3%	0%	70	22	18	389%	3.4
Portugal	1,503	-8%	15%	8	11	14	57%	1.4
Germany	1,096	+2%	1%	30	19	66	45%	0.8
Bulgaria	955	-1%	80%	8	9	9	93%	1.4
TOTAL EU 27	44,380	-3%	51%	510	14	594	86%	1.4

* Flock at the start of 2023 = flock of ewes and ewe lambs put to the ram in December 2022.

LIVESTOCK, PRODUCTION AND CONSUMPTION OF SHEEPMEAT IN THE WORLD IN 2023

Source: GEB-*Institut de l'Élevage* estimates based on FAOSTAT and national statistics

Countries	Total sheep flock (millions of head)	Evolution 2023/22	Slaughterings (1,000 t cwe)	Average carcass weight of lambs (kg)	Consumption (1,000 t cwe)	Self-sufficiency	Annual consumption (kg/cap)
China	322	-1%	5,300	-	5,746	92%	4.0
Australia	79	+4%	846	24.0	237	356%	8.9
Turkey	42	-6%	570	-	570	100%	6.7
New-Zealand	25	=	442	19.5	48	921%	9.2
UK	21	-5%	286	19.8	250	114%	4.0
Argentina*	13*	-7%*	41*	18.8*	38	108%	0.8
Uruguay	6	-1%	24	16.5*	4	620%	1.1

* 2022 data and 2022/2021 evolution.

GLOBAL TRADE IN SHEEPMEAT

SHEEPMEAT IMPORTS OF THE EU-27 IN 2023 (1 000 T CWE)*

Source: Eurostat

Country of origin	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2023/22
	bone-in	boneless	bone-in	boneless		
New-Zealand	25.8	15.9	10.0	6.7	58	+1%
Australia	1.1	1.9	1.2	0.1	4	-11%
South America	1.7	0.7	0	0	2	-29%
TOTAL	29.9	19.8	91.8	7,6	149	+3%

* Carcass coefficient used = 1.3 for boneless meat.

SHEEPMEAT EXPORTS FROM EU-27 IN 2023 (1 000 T CWE)*

Source: Eurostat

Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2023/22
	bone-in	boneless	bone-in	boneless		
Switzerland	0.6	1.1	1.5	0.5	3.7	+2%
Qatar	1.6	0.0	0.0	0	1.6	-50%
United Arab Emirates	1.1	0.0	0.0	0	1.2	-36%
Israel	1.0	0.0	0.4	0	1.5	-24%
Oman	1.3	0.0	0.0	0	1.3	-55%
TOTAL	12.8	6.3	8.6	3.2	30.8	-12%

* Carcass coefficient used = 1.3 for boneless meat.

NEW ZEALAND SHEEPMEAT EXPORTS IN 2023 (1 000 T CWE)*

Source: NZ Statistics (via TDM)

Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2023/22
	bone-in	boneless	bone-in	boneless		
Asia	219.2	16.4	0.5	0.2	236.2	+7%
<i>of which: China</i>	207.4	10.7	0.2	0.1	218.3	+10%
EU-27	25.5	16.7	10.1	6.9	59.2	+2%
USA	19.0	2.9	4.4	2.3	28.7	-6%
Middle East	8.3	0.1	1.8	0.1	10.3	+18%
Canada	6.4	1.9	2.8	0.2	11.3	-1%
TOTAL	310.6	48.0	25.1	14.0	397.7	+3%

* Carcass coefficient used = 1.3 for boneless meats.

AUSTRALIAN SHEEPMEAT EXPORTS IN 2023 (1 000 T CWE)*

Source: Trade Map

Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2023/22
	bone-in	boneless	bone-in	boneless		
South East Asia	44.4	11.0	1.9	0.3	58	+3%
China + Hong-Kong + Taiwan	181.7	44.5	1.8	0.4	228	+41%
Middle East	43.5	13.2	48.8	4.0	110	+75%
North America	35.6	18.9	34.3	19.6	108	-8%
Oceania	34.4	4.3	2.1	0.0	41	+9%
EU 27	1.6	2.1	1.2	0.1	5	-8%
TOTAL	374.5	119.6	105.7	32.7	633	+23%

* Carcass coefficient used = 1.3 for boneless meats.

PAYMENT OF SHEEP AID

EVOLUTION OF THE NUMBER OF FARMS AND EWES RECEIVING SHEEP AID

Source: Ministère de l'Agriculture, ASP

		2020	2021	2022	2023
Basic aid	Number of farms	18,435	18,332	17,890	17,242
	Number of ewes	4,621,453	4,596,043	4,582,769	4,358,034
"Productivity / quality approach / new breeder" bonus aid	Number of farms		1,989	1,919	2,231
	Number of ewes	209,849	211,244	204,096	233,808

UNIT AMOUNTS PAID

Source: Ministère de l'Agriculture

In euros/ewe	2020	2021	2022	2023
Basic amount	22.30*	21.90*	22.08*	22.00*
"Productivity / quality approach / new breeder" bonus aid in 2015-16, then «New farmers» in 2017	6.35	6.25	6.50	6.00

* +2 € supplement for the first 500 ewes

PAYMENT METHOD OF SHEEP AID IN 2024

- The amount of the basic sheep aid is of €22/ewe. **A supplement of €2/ewe remains granted to the first 500 ewes on the farm** (with application of the transparency principle of GAEC).
- The bonus aid for new sheep producers is of €6/ewe.

• Eligibility criteria to obtain the basic aid:

- Being an active farmer
- Holding at least 50 eligible ewes.
- Maintaining the workforce engaged on the farm during the mandatory holding period (100 days from February 1st to May 10th, 2024).
- Complying with a minimum productivity rate of 0.5 lamb born and sold per ewe and per year. If the rate is lower, a retropolation system is set up:

$$\text{Number of ewes obtaining the aid} = \frac{\text{number of ewes declared in 2024} \times \text{observed productivity rate in 2023}}{\text{imposed productivity rate (=0.5)}}$$

- The breeder is registered with the local identification office (EDE) in accordance with the regulations in force (decree of July 30th, 2014 related to the registration of farms and holders).

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