

THE KEY DATA
OF IDELE



French sheep 2026

Milk and meat production



THE PRODUCTION STRUCTURE IN FRANCE

EVOLUTION OF THE NUMBER OF PROFESSIONAL SHEEP FARMS IN FRANCE AT THE 1ST JANUARY (INCLUDING OVERSEA DEPARTMENTS)

Source: BDNI and Idele's estimates

Professionnal farms	2014	2019	2024	2025	2026e
Total of the professionnal sheep farms*	21,716	20,369	19,565	19,135	19,185
Dairy sheep farms	16,819	15,778	15,062	14,682	14,831
Suckler sheep farms	4,897	4,591	4,503	4,453	4,353

*Having at least 50 suckler breeding sheep or at least 25 dairy breeding sheep.

e=estimate based on the 6-month sheep BDNI fill rates (average of the last 3 full years available: 96.87% for dairy ewes farms, 96.92% for meat ewes farms).

AGE OF FRENCH SHEEP BREEDERS IN 2020

Source: Agreste agricultural census, processed by Idele

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 SUCKLER BREEDING SHEEP ACCORDING TO FLOCK SIZE

Source: BDNI count as of 01/01/2025 - Continental France

	Number of farms	% of total	Number of suckler breeding sheep	% of total
1 to 49 ewes	49,414	77%	481,710	13%
50 to 149 ewes	7,534	12%	647,670	17%
150 to 299 ewes	3,663	6%	778,480	21%
300 to 499 ewes	2,097	3%	796,330	21%
500 to 999 ewes	1,112	2%	732,010	19%
> 1,000 ewes	233	0%	353,780	9%

DISTRIBUTION OF LIVESTOCK AND FARMS HOLDING DAIRY BREEDING SHEEP ACCORDING TO FLOCK SIZE

Source: BDNI count as of 01/01/2025 - Continental France

	Number of farms	% of total	Number of dairy breeding sheep	% of total
1 to 24 ewes	1,364	24%	9,800	1%
25 to 49 ewes	274	5%	9,750	1%
50 to 149 ewes	802	14%	74,990	5%
150 to 299 ewes	1,065	18%	243,530	16%
300 to 499 ewes	1,428	25%	555,560	37%
> 500 ewes	867	15%	592,100	40%

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. At the start of each year, livestock farmers report their breeding stock numbers, as well as the births and fattening figures from the previous year, to the Departmental Livestock Establishments (EDE); then, they update the national sheep identification database (BDNI).

THE FRENCH SHEEP FLOCK

NUMBER OF BREEDING SHEEP IN PROFESSIONAL FARMS* AS OF JANUARY 1ST (1,000 HEAD)

Source: BDNI and Idele's estimates

	2014	2019	2024	2025	2026e
Breeding sheep	5,332	5,195	4,894	4,787	4,834
• suckler breeding sheep	3,783	3,651	3,401	3,310	3,374
• dairy breeding sheep	1,549	1,544	1,493	1,477	1,460

*Having at least 50 suckler breeding sheep or at least 25 dairy breeding sheep.
e=estimate based on the 6-month sheep BDNI filling rates (average of the last 3 full years available: 97.43% for dairy ewes and 97.92% for meat ewes).

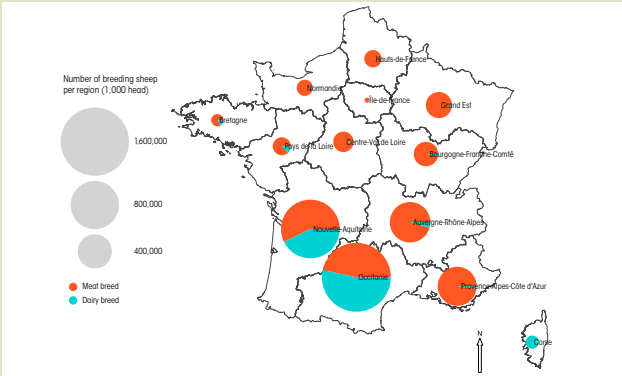
REGIONAL DISTRIBUTION OF THE FRENCH BREEDING FLOCK IN PROFESSIONAL FARMS*

Source: BDNI count as of 01/01/2025 - Continental France

Suckler breeding sheep			Dairy breeding sheep		
Regions	1,000 heads	% France	Regions	1,000 heads	% France
Nouvelle Aquitaine	659	20%	Occitanie	806	55%
Occitanie	700	21%	Nouvelle Aquitaine	522	35%
Auvergne-Rhône-Alpes	503	15%	Corse	66	4%
PACA	549	17%	Auvergne-Rhône-Alpes	34	2%
Grand Est	242	7%	PACA	13	1%
Bourgogne-Franche-Comté	181	5%			

*Having at least 50 suckler breeding sheep or at least 25 dairy breeding sheep.

REGIONAL FLOCK OF BREEDING SHEEP AS OF JANUARY 1ST, 2025



Sources : GEB-Idele according to BDNI (sheep)
Map created with Cartes & Données - © Artique

SHEEPMEAT IN FRANCE

■ SLAUGHTERINGS

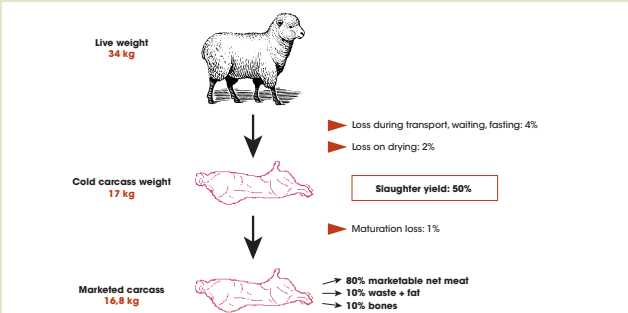
DISTRIBUTION OF CONTROLLED SLAUGHTERING OF SHEEP

Source: SSP

	1,000 heads		1,000 t carcass weight equivalent (cwe)		Average carcass weight (kg)	
	2024	2025	2024	2025	2024	2025
Lambs	3,045	2,868	56	54	18.4	18.9
Adult sheep	462	437	12	12	26.3	27.2
TOTAL	3,507	3,305	68	66	-	-

FROM LAMB TO PLATE

Source: Idele



Share of pieces in the carcass

hind quarter: 55%

Leg	4.2 kg	25%
Saddle	1.5 kg	9%
Fillet	1.7 kg	10%
Rack	1.8 kg	11%

front quarter: 45%

Uncovered loin	1 kg	6%
Breast	2.2 kg	13%
Shoulder	3.2 kg	19%
Neck	1.2 kg	7%

ORGANISATION OF FRENCH SHEEPMEAT PRODUCTION

Source: Idele estimates based on la Coop ration Agricole and FNO

	Commercial producer organisations (2024)	Non-commercial producer organisations (2025e)
Number of producer organisations	31	9
Number of members	8,445	1,032
Number of ewes held	1,813,000	342,960
Share of lambs sold by French farms	52%	<10%

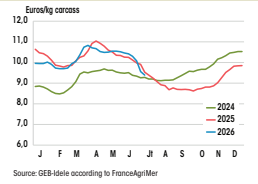
■ PRODUCER PRICES AND PRODUCTION COSTS

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

Source: FranceAgriMer

	2024	2025
Average producer price	9.43	9.71
Average price index, weighted by price in 2020	139.9	101.0

French lamb average producer price



AGRICULTURAL MEANS OF PRODUCTION PURCHASING PRICE INDEX (IPAMPA)

Source: Idele

Level 100 in Jan. 2020	2024	2025	May 2026
Sheepmeat IPAMPA	124.1	123.2	130.7
Purchased feed index (22% of the sheepmeat IPAMPA)	124.5	120.7	121.1
Energy and lubricants' index (8% of the sheepmeat IPAMPA)	164.1	147.6	214.3

■ 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)	
	2024	2025	2024	2025
Spain	124	77	20	14
Portugal	0	0	0	0
Netherlands	3	0	0	0
Ireland	7	1	1	0
Germany	0	0	0	0
Hungary	0	0	0	0
Other countries	2	1	0	0
TOTAL	136	79	20	14

FRENCH EXPORTS OF LIVE SHEEP

Source: French customs

Destination	Lambs (1,000 head)		Adult sheep (1,000 head)	
	2024	2025	2024	2025
Spain	310	352	6	6
Italy	71	70	25	38
Hungary	0	0	10	0
Germany	7	35	0	1
Greece	12	5	2	3
Portugal	2	2	0	0
Cyprus	1	0	3	0
Bulgaria	0	2	0	0
Other countries	3	2	2	1
TOTAL	406	468	49	49

■ SHEEPMEAT TRADE

IMPORTS OF SHEEPMEAT* IN 2025 (1,000 TONNES CWE**)

Source: French customs and Idele's estimates

Country of origin	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2025/24
	bone-in	boneless	bone-in	boneless		
Ireland	0.3	0.7	10.3	2.5	14	-12%
Spain	2.3	1.4	8.1	0.1	12	-12%
TOTAL EU-27	3.3	3.0	22.0	3.0	31	-12%
New-Zealand	5.0	0.6	4.1	1.5	11	-9%
United Kingdom	0.8	0.8	30.7	0.3	33	-8%
TOTAL third countries	6.1	2.5	35.6	2.1	46	-7%
TOTAL	9.4	5.5	57.6	5.1	78	-9%

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

** Carcass coefficient used = 1.3 for boneless meat.

EXPORTS OF SHEEPMEAT* IN 2025 (1,000 TONNES CWE**)

Source: French customs and Idele's estimates

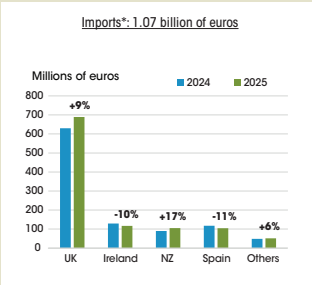
Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2025/24
	bone-in	boneless	bone-in	boneless		
Italy	0.0	0.0	3.3	0.0	3	=
Belgium	0.0	0.0	0.8	0.2	1	+1%
Germany	0.0	0.1	0.3	0.0	0	-7%
TOTAL EU-27	0.6	0.3	5.3	0.3	7	-1%
TOTAL	1.0	0.6	6.1	0.4	8	-1%

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

** Carcass coefficient used = 1.3 for boneless meat.

FRENCH TRADE IN VALUE IN 2025 (SHEEPMEAT AND LIVE SHEEP)

Source: French customs



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

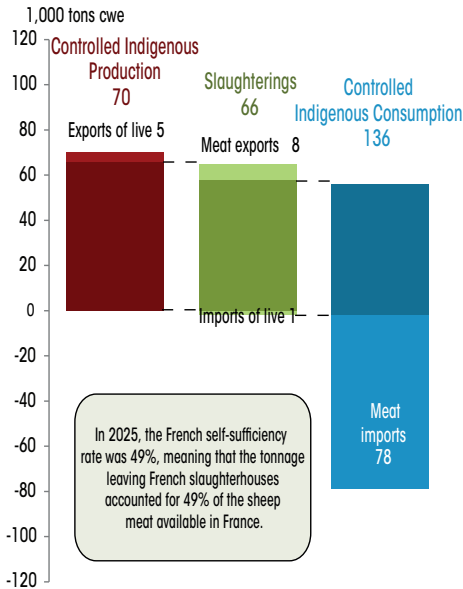
■ FRENCH SHEEPMATE BALANCE SHEET

FRENCH SHEEPMATE BALANCE SHEET

Source: SSP, French customs

1,000 tonnes cwe	2024	2025
Controlled slaughterings	68	66
- imports of live sheep	2	1
+ exports of live sheep	4	5
= Controlled Indigenous Production	70	70
+ sheepmeat importations*	85	78
- sheepmeat exportations*	8	8
= Consumption by balance sheet	145	136
Self-sufficiency rate (slaughterings/availability)	47%	49%

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

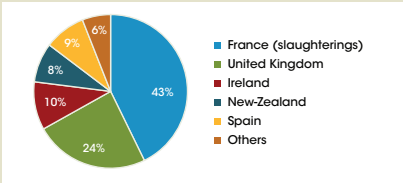


Source: GEB-Idele, according to SSP and French Customs

■ SHEEPMEAT CONSUMPTION

COUNTRY OF ORIGIN OF THE SHEEPMEAT EATEN IN FRANCE IN 2025

Source: GEB-Idele according to SSP and French customs



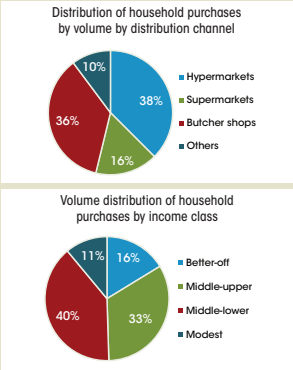
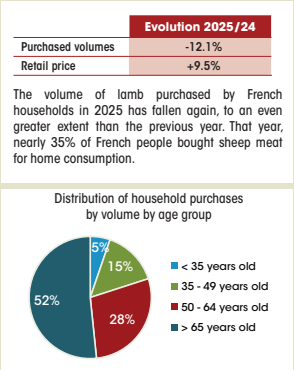
CONTROLLED INDIGENOUS CONSUMPTION OF SHEEPMEAT IN FRANCE

Source: GEB-Idele according to SSP, Eurostat and IFIP

	Total consumption (1,000 tonnes cwe)		In kg cwe per capita		Slaughterings/ Consumption (%)	
	2020	2025	2020	2025	2020	2025
Sheepmeat	155	136	2.3	2.0	52%	49%
Beef	1,496	1,385	22.1	20.1	96%	91%
Goat meat	5	5	0.1	0.1	113%	118%
Pork	2,118	2,175	31.3	31.5	104%	97%
Poultry	1,897	2,183	28.1	31.6	88%	77%
Horse	6	4	0.1	0.1	31%	31%

PURCHASES OF SHEEP MEAT BY THE FRENCH CONSUMERS IN 2025

Source: GEB-Idele according to FranceAgriMer, Woldrpanel by Numerator



SHEEP MILK IN FRANCE

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

Source: FranceAgriMer and Interprofessions

In millions of liters	2023-2024	2024-2025	Evolution (%)
Roquefort area	163	166	+2%
Pyrénées-Atlantiques	60	61	+2%
Corse	5	5	=
Other areas	59	58	-2%
TOTAL	286	290	+1%

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

Source: SSP / FranceAgriMer - Monthly dairy survey

In thousands of tonnes	2024	2025	Evolution (%)
Roquefort cheese	15	16	+5%
Uncooked pressed cheeses	17	18	+6%
including Ossau Iraty	4	4	+6%
TOTAL sheep cheeses	57	59	+4%

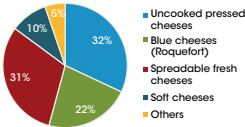
SHEEP MILK IPAMPA (PERIOD: FROM OCTOBER TO SEPTEMBER)

Source: Idele from INSEE and Agreste

Base 100 = 2020	2023-2024	2024-2025	Evolution (%)
Sheep milk IPAMPA	126.6	123.1	-3%
Purchased feed index (27% of sheep milk IPAMPA)	130.7	121.0	-7%
Energy and lubricants index (8% of sheep milk IPAMPA)	164.5	146.7	-11%
Materials Index (20% of sheep milk IPAMPA)	119.2	119.0	=

PURCHASES OF SHEEP CHEESE BY THE FRENCH CONSUMERS IN 2025

Source: GEB - Idele d'après FranceAgriMer, Wordpanel by Numerator



According to *Wordpanel by Numerator* (for FranceAgriMer), purchases of sheep's milk cheese rebounded by 6% in 2025, with a weighted average price that fell by just 1% (following increases of 1% in 2024, 11% in 2023, and 5% in 2022). **Roquefort** sales recovered (+0.7%) even as the average price rose by 3%. Conversely, **Ossau-Iraty** saw sales drop by 5%, with the average price rising by 0.5%. As is often the case, **salad cheeses like feta** performed well, posting gains of 18% in volume and 2% in price. After three years of decline, sales of ultra-fresh dairy products surged by 15% in 2025, with prices falling by 3%.

THE SHEEP SECTOR IN THE EU AND IN THE WORLD

In 2025, France provided again 15% of the EU-27's sheep meat supply, behind Romania which provided 16% and Spain which provided 22%.

LIVESTOCK, PRODUCTION AND CONSUMPTION OF SHEEPMET IN THE EU IN 2025

Source: Eurostat and Idele estimates

Countries	Breeding livestock (1,000 head)	Evolution 2025/24	Share of dairy sheep	Slaughte- rings (1,000 t cwe)	Average carcass weight of lambs (kg)	Consump- tion (1,000 t cwe)	Self- sufficiency	Annual consump- tion (kg/cap)
Spain	8,112	-18%	21%	98	12	60	165%	1.2
Romania	9,338	+3%	86%	72	13	60	120%	3.1
Italy	4,785	-3%	85%	25	10	52	48%	0.9
Greece	5,638	-3%	81%	50	10	53	94%	5.1
France	4,912	+1%	28%	66	19	137	48%	2.0
Ireland	2,472	=	=	53	22	10	522%	1.9
Portugal	1,391	-8%	15%	12	12	16	73%	1.5
Germany	1,068	-2%	1%	19	20	60	32%	0.7
Bulgaria	846	-6%	73%	8	11	11	75%	1.7
TOTAL EU 27	41,699	-5%	51%	447	16	581	77%	1.6

LIVESTOCK, PRODUCTION AND CONSUMPTION OF SHEEPMET IN THE WORLD IN 2025

Source: GEB-Idele estimates based on FAOSTAT and national statistics

Countries	Total sheep flock (millions of head)	Evolution 2025/24	Slaughterings (1.000 t cwe)	Average carcass weight of lambs (kg)	Consump- tion (1.000 t cwe)	Self- sufficiency	Annual consumption (kg/cap)
China	280	-7%	4,960	19.0	5,296	94%	3.8
Australia	74	-6%	856	24.3	222	386%	8.0
Turkey	46	+6%	469	23.0	468	100%	5.4
New- Zealand	23	-1%	427	19.6	43	984%	8.2
United Kingdom	30	-2%	272	20.5	263	103%	3.8
Argentina*	12	-1%	37	18.0	33	108%	0.7
Uruguay*	6	-5%	20	18.0	7	286%	1.9

* 2024 data.

GLOBAL TRADE IN SHEEPMEAT

SHEEPMEAT IMPORTS OF THE EU-27 IN 2025 (1 000 T CWE)*

Source: Eurostat

Country of origin	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2025/24
	bone-in	boneless	bone-in	boneless		
UK	1.0	0.0	76.8	1.2	79	+9%
New-Zealand	35.7	7.5	10.8	19.3	73	+14%
Australia	1.5	0.1	1.0	2.4	5	+27%
South America	3.4	0.0	0.0	1.0	4	+60%
TOTAL	42.2	8.8	90.0	24.4	165	+13%

* Carcass coefficient used = 1.3 for boneless meat.

SHEEPMEAT EXPORTS FROM EU-27 IN 2025 (1 000 T CWE)*

Source: Eurostat

Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2025/24
	bone-in	boneless	bone-in	boneless		
Qatar	0.2	0.0	0.0	0.0	0.2	-67%
Switzerland	0.3	0.9	0.8	0.9	2.9	-6%
United Arab Emirates	0.3	0.0	0.0	0.0	0.3	-66%
Israel	0.7	0.0	0.6	0.0	1.3	+7%
UK	0.8	1.0	3.4	1.0	6.3	-29%
TOTAL	6.1	3.3	20.4	1.9	31.7	+18%

* Carcass coefficient used = 1.3 for boneless meat.

NEW ZEALAND SHEEPMEAT EXPORTS IN 2025 (1 000 T CWE*)

Source: NZ Statistics

Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2025/24
	bone-in	boneless	bone-in	boneless		
Asia	172.2	14.2	0.9	2.3	190	-3%
<i>of which: China</i>	150.5	6.9	0.1	0.0	158	-7%
EU-27	37.2	20.5	10.8	7.7	76	+17%
UK	24.9	11.8	1.9	0.5	39	-14%
USA	21.0	4.2	6.4	2.4	34	-7%
Middle East	15.7	0.2	2.6	0.1	19	+12%
TOTAL	290.4	55.6	26.1	14.2	386	=

* Carcass coefficient used = 1.3 for boneless meats.

AUSTRALIAN SHEEPMEAT EXPORTS IN 2025 (1 000 T CWE*)

Source: TDM

Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2025/24
	bone-in	boneless	bone-in	boneless		
South East Asia	47.4	17.3	2.7	0.2	68	+2%
China + Hong-Kong + Taiwan	138.2	27.2	9.6	1.3	176	-13%
Middle East	60.4	19.0	54.5	4.8	139	-14%
North America	41.3	34.1	35.1	29.5	140	+10%
Oceania	27.9	5.3	0.8	0.1	34	-2%
EU 27	1.5	3.8	1.1	0.1	7	+47%
TOTAL	673.0	265.3	221.4	86.3	633	-8%

* 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

		2022	2023	2024	2025
Basic aid	Number of farms	17,890	17,242	16,970	16,378
	Number of ewes	4,582,769	4,358,034	4,250,996	4,184,400
Supplement for «new sheep producers»	Number of farms	1,919	2,231	2,201	2,150
	Number of ewes	204,096	233,808	251,676	239,600

UNIT AMOUNTS PAID

Source: Ministère de l'Agriculture

In euros/ewe	2022	2023	2024	2025
Basic amount*	22.08	22.00	22.00	21.56
Supplement for «new sheep producer»	6.50	6.00	6.00	6.57

* +2 € supplement for the first 500 ewes

PAYMENT METHOD OF SHEEP AID IN 2026

- The amount of basic sheep aid is set at 20,54 €/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 increase for new sheep producers is set at €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 3 to May 13th, 2026 inclusive).
- Respect a minimum productivity ratio of 0.5 lambs born and sold per ewe per year. If the ratio is lower, a retropolation system is set up:

Number of prize-winning ewes =

number of ewes declared in 2025 × observed productivity ratio in 2025

imposed productivity ratio (=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).

Reminder: sheep aid will be increased by €15.2 million for 2026 and 2027 (i.e. €7.6 million per year) thanks to the redeployment of 257 million € (residual funds from the 2nd pillar of the CAP in 2023 and 2024).

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