

THE KEY DATA
OF IDELE



French sheep 2025

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	2022	2023	2024
Having sheep	95,700	56,505	33,234	31,256	30,186
Having meat ewes	89,768	50,451	27,977	25,883	25,115
Having dairy ewes	6,070	5,494	4,520	4,513	4,357

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 MEAT EWES ACCORDING TO FLOCK SIZE

Source: BDNI count as of 01/01/2024 - Continental France

	Number of farms	% of total	Number of meat ewes	% of total
1 to 49 ewes	49,720	77%	488,420	13%
50 to 149 ewes	7,690	12%	659,870	17%
150 to 299 ewes	3,750	6%	794,950	21%
300 to 499 ewes	2,180	3%	831,740	21%
500 to 999 ewes	1,140	2%	749,610	19%
> 1,000 ewes	250	0%	360,640	9%

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

Source: BDNI count as of 01/01/2024 - Continental France

	Number of farms	% of total	Number of milk ewes	% of total
1 to 49 ewes	1,550	27%	18,530	1%
50 to 149 ewes	800	14%	75,770	5%
150 to 299 ewes	1,070	18%	245,100	17%
300 to 499 ewes	1,480	26%	572,400	38%
> 500 ewes	860	15%	588,500	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

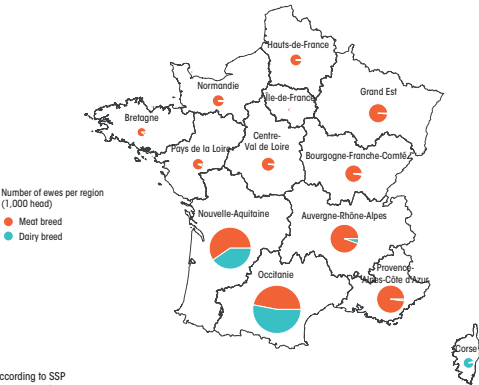
November livestock surveys	2000	2012	2022	2023	2024
Total sheep	9,554	7,462	6,746	6,802	6,607
Ewes and ewe lambs put to the ram	7,306	5,713	4,985	4,970	4,862
• Meat ewes	5,704	4,134	3,437	3,475	3,429
• Dairy ewes	1,602	1,580	1,548	1,495	1,433

REGIONAL DISTRIBUTION OF FRENCH BREEDING FLOCK IN NOVEMBER 2024

Source: SSP (Livestock survey 2024)

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	772	23%	Occitanie	821	57%
Nouvelle Aquitaine	697	20%	Nouvelle Aquitaine	473	33%
PACA	534	16%	Corse	73	5%
Auvergne-Rhône-Alpes	508	15%	Auvergne-Rhône-Alpes	30	2%
Grand Est	255	7%	PACA	10	1%
Bourgogne-Franche-Comté	187	5%			

REGIONAL FLOCKS OF EWES AND EWE LAMBS PUT TO THE RAM IN NOV. 2024 (1,000 HEAD)



Sources : GEB-Idéle according to SSP
Map created with Cartes & Données - © Artique

SHEEPMEAT IN FRANCE

■ SLAUGHTERINGS

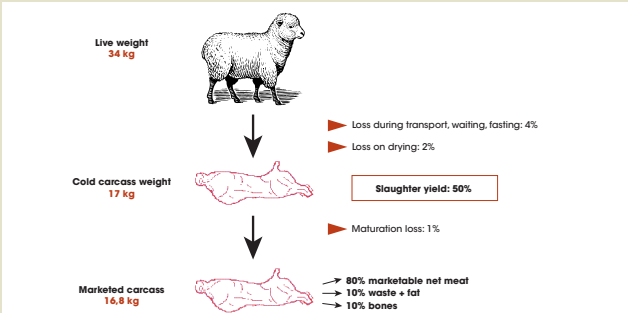
DISTRIBUTION OF CONTROLLED SLAUGHTERING OF SHEEP

Source: SSP

	1,000 heads		1,000 t carcass weight equivalent (cwe)		Average carcass weight (kg)	
	2023	2024	2023	2024	2023	2024
Lambs	3,217	3,045	59	56	18.4	18.4
Adult sheep	516	462	14	12	26.5	26.3
TOTAL	3,733	3,507	73	68	-	-

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 (2023)	Non-commercial producer organisations (2024)
Number of producer organisations	33	9
Number of members	7,653	1,008
Number of ewes held	1,505,909	334,700
Share of lambs sold by French farms	57%	>10%

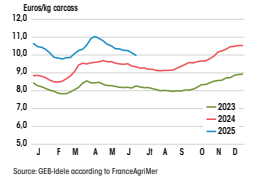
■ PRODUCER PRICES AND PRODUCTION COSTS

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

Source: FranceAgriMer

	2023	2024
Average producer price	8.26	9.43
Average price index, weighted by price in 2020	122.5	139.9

French lamb average producer price



AGRICULTURAL MEANS OF PRODUCTION PURCHASING PRICE INDEX (IPAMPA)

Source: Idele

Level 100 in Jan. 2020	2023	2024	May 2025
Sheepmeat IPAMPA	129.3	124.1	122.7
Purchased feed index (22% of the sheepmeat IPAMPA)	137.3	124.5	122.9
Energy and lubricants' index (8% of the sheepmeat IPAMPA)	176.9	164.1	137.7

■ 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)	
	2023	2024	2023	2024
Spain	102	124	22	20
Portugal	32	0	0	0
Netherlands	12	3	0	0
Ireland	12	7	1	1
Germany	2	0	0	0
Hungary	0	0	0	0
Other countries	0	2	1	0
TOTAL	160	136	24	20

FRENCH EXPORTS OF LIVE SHEEP

Source: French customs

Destination	Lambs (1,000 head)		Adult sheep (1,000 head)	
	2023	2024	2023	2024
Spain	294	310	11	6
Italy	71	71	28	25
Israel	13	0	0	0
Greece	16	12	4	2
Poland	0	0	0	0
Germany	10	7	0	0
Netherlands	1	2	0	0
Lebanon	0	0	2	1
Other countries	5	4	7	14
TOTAL	410	406	52	49

■ SHEEPMEAT TRADE

IMPORTS OF SHEEPMEAT IN 2024* (1,000 TONNES CWE**)

Source: French customs

Country of origin	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2024/23
	bone-in	boneless	bone-in	boneless		
Ireland	0.3	1.0	12.1	2.2	16	-11%
Spain	1.4	1.7	10.2	0.1	13	+12%
TOTAL EU-27	2.5	3.9	25.4	3.6	35	=
New-Zealand	5.1	0.6	5.3	1.3	12	+11%
United Kingdom	0.6	0.9	33.7	0.5	36	-6%
TOTAL third countries	6.5	1.6	39.6	1.8	50	-2%
TOTAL	9.0	5.5	65.0	5.5	85	-1%

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

** Carcass coefficient used = 1.3 for boneless meat.

EXPORTS OF SHEEPMEAT IN 2024* (1,000 TONNES CWE**)

Source: French customs

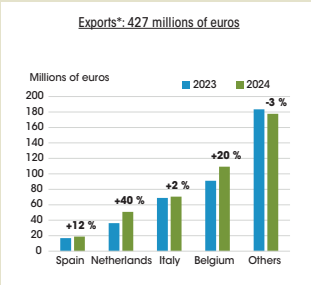
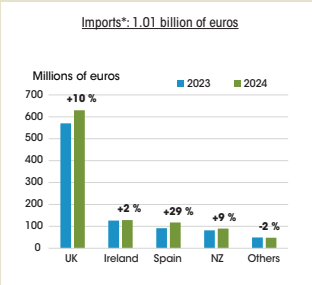
Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2024/23
	bone-in	boneless	bone-in	boneless		
Italy	0.0	0.0	3.3	0.0	3	-1%
Belgium	0.0	0.0	0.8	0.2	1	-3%
Germany	0.0	0.1	0.3	0.0	0	-4%
TOTAL EU-27	0.6	0.3	5.3	0.3	7	-2%
TOTAL	1.0	0.6	6.1	0.4	8	-2%

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

** Carcass coefficient used = 1.3 for boneless meat.

FRENCH TRADE IN VALUE IN 2024 (SHEEPMEAT AND LIVE SHEEP)

Source: French customs



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

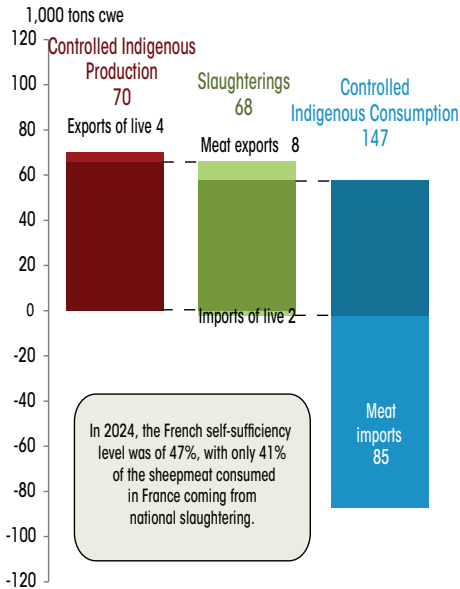
■ FRENCH SHEEPMATE BALANCE SHEET

FRENCH SHEEPMATE BALANCE SHEET

Source: SSP, French customs

1,000 tonnes cwe	2023	2024
Controlled slaughterings	73	68
- imports of live sheep	3	2
+ exports of live sheep	5	4
= Controlled Indigenous Production	76	70
+ sheepmeat importations*	86	85
- sheepmeat exportations*	8	8
= Consumption by balance sheet	151	145
Self-sufficiency rate = (slaughtering-exports)/consumption	44%	41%

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

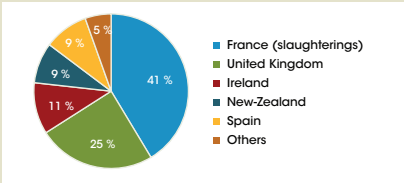


Source: GEB-Idele, according to SSP and French Customs

■ SHEEPMEAT CONSUMPTION

COUNTRY OF ORIGIN OF THE SHEEPMEAT EATEN IN FRANCE IN 2024

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

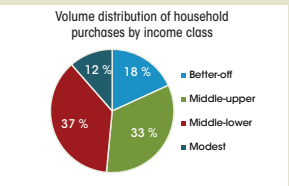
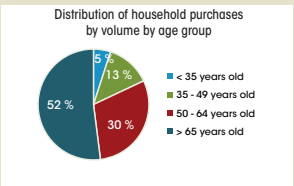
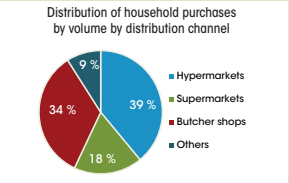
	Total consumption (1,000 tonnes cwe)		In kg cwe per capita		Slaughterings/ Consumption (%)	
	2019	2024	2019	2024	2019	2024
Sheepmeat	164	145	2.4	2.1	49%	47%
Beef	1,542	1,424	22.9	20.8	93%	91%
Goat meat	5	5	0.1	0.1	120%	119%
Pork	2,138	2,117	31.7	30.9	103%	99%
Poultry	1,903	2,178	28.3	31.8	89%	79%
Horse	8	5	0.1	0.1	29%	24%

PURCHASES OF LAMB MEAT BY FRENCH HOUSEHOLDS IN 2024

Source: GEB-Idele according to FranceAgriMer, Panel Kantar

	Evolution 2024/23
Purchased volumes	-11.4%
Retail price	+3.2%

The volume of lamb purchased by French households in 2024 has fallen again, and more significantly than the previous year. Nearly 37% of French people bought sheep meat for home consumption.



SHEEP MILK IN FRANCE

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

Source: FranceAgriMer and Interprofessions

In millions of liters	2021-2023	2023-2024	Evolution (%)
Roquefort area	171	163	-5%
Pyrénées-Atlantiques	61	60	-2%
Corse	5	5	=
Other areas	59	59	+1%
TOTAL	296	288	-3%

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

Source: SSP / FranceAgriMer - Monthly dairy survey

In thousands of tonnes	2023	2024	Evolution (%)
Roquefort cheese	16	15	-6%
Uncooked pressed cheeses	17	17	-1%
including Ossau Iraty	4	4	-1%
TOTAL sheep cheeses	58	57	-2%

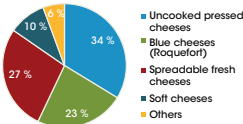
SHEEP MILK IPAMPA (PERIOD: FROM NOVEMBER TO OCTOBER)

Source: Idele from INSEE and Agreste

Base 100 = 2020	2022-2023	2023-2024	Evolution (%)
Sheep milk IPAMPA	131.7	126.1	-4%
Purchased feed index (27% of sheep milk IPAMPA)	144.8	129.6	-10%
Energy and lubricants index (8% of sheep milk IPAMPA)	167.1	162.3	-3%
Materials Index (20% of sheep milk IPAMPA)	117.9	119.1	+1%

PURCHASES OF SHEEP CHEESE BY FRENCH HOUSEHOLDS IN 2024

Source: Panel Kantar



According to the Kantar panel, for FranceAgriMer, purchases of sheep's milk cheeses fell by 3% between 2023 and 2024, with an average price up by only 1% (but this follows increases of 5% in 2022 and 11% in 2023). Roquefort sales fell by 11%, with an average price down 1%, while Ossau Iraty saw its sales increase by 3%, with a price increase of 1%. Salad cheeses such as feta are doing well, with +3% in volume and +1% in price. Sales of ultra-fresh products are down for the third year, by 7%, with prices up 2%.

THE SHEEP SECTOR IN THE EU AND IN THE WORLD

In 2024, France provided 15% of the EU-27's sheep meat supply, behind Romania which provided 17% and Spain which provided 21%.

LIVESTOCK, PRODUCTION AND CONSUMPTION OF SHEEPMET IN THE EU IN 2024

Source: Eurostat and Idele estimates

Countries	Breeding livestock (1,000 head)	Evolution 2024/23	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	9,952	+1%	20%	98	11	65	151%	1.3
Romania	8,957	+1%	88%	77	11	75	103%	3.9
Italy	4,931	-16%	75%	23	9	48	48%	0.8
Greece	5,836	-2%	94%	43	9	44	97%	4.2
France	4,708	-2%	30%	68	18	145	47%	2.1
Ireland	2,505	-3%	0%	63	22	16	389%	3.0
Portugal	1,507	-5%	15%	14	12	17	80%	1.6
Germany	1,086	-1%	1%	29	20	64	45%	0.8
Bulgaria	901	-4%	75%	9	11	11	84%	1.7
TOTAL EU 27	43,609	-3%	49%	466	13	552	84%	1.3

LIVESTOCK, PRODUCTION AND CONSUMPTION OF SHEEPMET IN THE WORLD IN 2024

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

Countries	Total sheep flock (millions of head)	Evolution 2024/23	Slaughterings (1,000 t cwe)	Average carcass weight of lambs (kg)	Consump- tion (1,000 t cwe)	Self- sufficiency	Annual consumption (kg/cap)
China	301	-7%	5 180	-	5 548	93%	3.9
Australia	79	+1%	928	23.9	240	386%	8.9
Turkey	44	+5%	510	-	509	100%	5.9
New-Zealand	23	-4%	432	19.1	46	939%	8.6
UK	21	-2%	266	19.9	262	102%	3.8
Argentina*	13	-	44	-	40	108%	0.9
Uruguay	5	-9%	15	-	2	744%	0.6

* 2023 data.

GLOBAL TRADE IN SHEEPMEAT

SHEEPMEAT IMPORTS OF THE EU-27 IN 2024 (1 000 T CWE)*

Source: Eurostat

Country of origin	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2024/23
	bone-in	boneless	bone-in	boneless		
UK	1.1	0.0	70.0	0.9	72	-10%
New-Zealand	30.0	15.4	11.5	7.2	64	+10%
Australia	1.3	1.7	0.8	0.1	4	-8%
South America	2.3	0.4	0	0	3	+20%
TOTAL	35.3	18.9	84.1	8.2	146	-2%

* Carcass coefficient used = 1.3 for boneless meat.

SHEEPMEAT EXPORTS FROM EU-27 IN 2024 (1 000 T CWE)*

Source: Eurostat

Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2024/23
	bone-in	boneless	bone-in	boneless		
Switzerland	0.2	1.2	1.1	0.5	3.1	-17%
Israel	0.6	0.0	0.6	0	1.2	-15%
United Arab Emirates	0.7	0.0	0.1	0	0.8	-36%
Qatar	0.6	0.0	0.0	0	0.6	-63%
Oman	0.1	0.0	0.0	0	0.1	-95%
TOTAL	7.5	3.8	12.7	2.9	26.9	-13%

* Carcass coefficient used = 1.3 for boneless meat.

NEW ZEALAND SHEEPMEAT EXPORTS IN 2024 (1 000 T CWE*)

Source: NZ Statistics (via TDM)

Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2024/23
	bone-in	boneless	bone-in	boneless		
Asia	176.6	11.7	0.4	0.2	188.9	-20%
of which: China	162.2	6.8	0.2	0.1	169.4	-22%
EU-27	30.1	16.1	11.5	7.2	65.0	+10%
UK	26.0	15.1	3.5	1.1	45.8	+43%
USA	22.4	6.6	5.0	2.6	36.7	+28%
Middle East	13.8	0.2	2.5	0.1	16.6	+11%
TOTAL	290.9	55.8	26.9	14.7	388.3	-2%

* Carcass coefficient used = 1.3 for boneless meats.

AUSTRALIAN SHEEPMEAT EXPORTS IN 2024 (1 000 T CWE*)

Source: TDM

Destination	Frozen meat		Fresh and chilled meat		TOTAL	Evolution 2024/23
	bone-in	boneless	bone-in	boneless		
South East Asia	51.2	12.4	2.1	0.3	66	+19%
China + Hong-Kong + Taiwan	165.8	31.1	5.9	0.6	203	-7%
Middle East	65.2	15.3	76.7	4.0	161	+53%
North America	37.4	26.2	38.6	25.1	127	+29%
Oceania	30.2	3.9	0.8	0.0	35	-5%
EU 27	1.5	2.1	0.8	0.1	4	-3%
TOTAL	389.1	121.0	138.6	40.0	633	+5%

* 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

		2021	2022	2023	2024
Basic aid	Number of farms	18,332	17,890	17,242	16,970
	Number of ewes	4,596,043	4,582,769	4,358,034	4,250,996
"Productivity / quality approach / new breeder" bonus aid	Number of farms	1,989	1,919	2,231	2,201
	Number of ewes	211,244	204,096	233,808	251,676

UNIT AMOUNTS PAID

Source: Ministère de l'Agriculture

In euros/ewe	2021	2022	2023	2024
Basic amount*	21.90	22.08	22.00	22.00
"Productivity / quality approach / new breeder" bonus aid in 2015-16, then «New farmers» in 2017	6.25	6.50	6.00	6.00

* +2 € supplement for the first 500 ewes

PAYMENT METHOD OF SHEEP AID IN 2025

- The amount of the basic sheep aid is of €21.40/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 11th, 2025).
- 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:

Number of ewes obtaining the aid =
$$\frac{\text{number of ewes declared in 2025} \times \text{observed productivity rate in 2024}}{\text{imposed productivity rate (=0.5)}}$$

- 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).

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).

PUBLICATION DE L'INSTITUT DE L'ÉLEVAGE ET DE LA CNE

Réalisation : Corinne Maigret
Références : 0025 501 020 - ISSN : 124168528
Consultable sur www.idele.fr
Crédit photo : ©Corinne Maigret
GEB - Institut de l'Élevage, 149 rue de Bercy, 75595 Paris Cedex 12

