

THE KEY FIGURES
OF IDELE



French goats 2024

Milk and meat production



ORGANISATION OF THE GOAT MILK AND MEAT PRODUCTION IN FRANCE

• According to the 2020 agricultural census

Nearly **10,000 farms** declared having at least one goat (-33% compared to 2010) for a herd of 919,000 goats, including 908,000 managed by farms of at least 10 goats, whose number is much more stable (6,700 in 2020, -12%).

- **3,300 farms** (up by 16%/2010) with **cheese processing declared on the farm** (87 goats on average).
- **2,400 milk deliverers** estimated, accounting for 65% of the goats (251 goats on average).
- **1,000 other farms** (26 goats on average) **without declared cheese processing or possibility of milk delivery** (goat meat, eco-grazing, domestic cheese processing, mohair, leading and nursing Rove goats in pastoral herds, etc.).

EVOLUTION OF THE NUMBER OF DAIRY FARMS

Source: GEB-Institut de l'Élevage according to BDNI, Agreste and FranceAgriMer

	2019	2020	2021	2022	2023
Goat holders (minimum one goat - mainland France) - November 1st	9,507	9,975	9,961	9,507	8,826
Goat holders (more than 25 goats) - January, 1st	5,300	5,383	5,410	5,460	5,410
Milk delivering farms	2,444	2,456	2,423	2,454	2,357

NUMBER OF FARMS AND DISTRIBUTION OF THE DAIRY HERD

Source: GEB-Institut de l'Élevage according to BDNI 2022

Farms >=24 dairy goat breeders	Number of farms	% of the total	Number of dairy goats	% of the total
25 to 49 goats	1,040	19%	37,920	4%
50 to 149 goats	2,030	38%	175,300	16%
150 to 299 goats	1,200	22%	260,560	24%
300 to 499 goats	710	13%	270,330	25%
500 to 999 goats	380	7%	250,000	23%
More than 1,000 goats	50	1%	75,440	7%
Total	5,410	100%	1,069,550	100%

DISTRIBUTION OF THE GOAT HERD ACCORDING TO THE AGE OF THE FARMERS (INCLUDING CO-HEADS OF FARMS)

Source: GEB-Institut de l'Élevage according to MSA and SPIE

Goat farms	% of farmers (farms with more than 10 dairy goats)			% of dairy goats*
	2000	2010	2020	2020
Less than 40 years old	37	31	32	32
40-49 years old	34	32	26	26
50 years old and more	29	37	43	42
<i>of which 55 years old and more</i>			28	26

* Including co-heads of farms.

In France, **agricultural censuses (RA)** take place every 10 years. These exhaustive surveys carried out on farms throughout the country constitute a complete snapshot of French agriculture. **The last census was carried out in 2020** but BDNI data and annual livestock surveys provide more recent information on the evolution of the number and size of farms.

THE GOAT HERD IN FRANCE

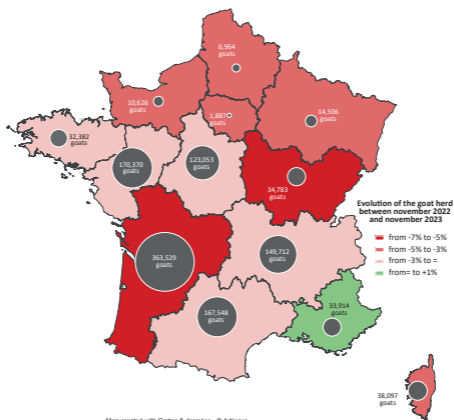
GOAT HERD IN MAINLAND FRANCE ON THE 1ST OF NOVEMBER

Source: GEB-Institut de l'Élevage according to Agreste - Herd survey 2023

(thousand head)	2010	2015	2019	2020	2021	2022	2023
Goats	1,400	1,200	1,270	1,380	1,350	1,280	1,250
- of which: female goats	962	850	873	920	920	880	860
- of which: female kids	317	286	299	330	330	310	290

REGIONAL DISTRIBUTION OF THE GOAT HERD AS OF NOVEMBER 1, 2023 AND EVOLUTION COMPARED TO 2022

Source: GEB-Institut de l'Élevage according to Agreste - Herd survey 2023



MAIN GOAT REGIONS ACCORDING TO THE NUMBER OF FARMS*, DAIRY GOATS AND FEMALE KIDS

Source: GEB-Institut de l'Élevage according to Agreste - Herd survey

Goat farms	Number of farms	% of total	Number of goats and female kids	% of total	Average herd size
Nouvelle-Aquitaine	1,476	17%	363,500	29%	246
Pays de la Loire	543	6%	170,400	14%	314
Occitanie	1,364	15%	167,500	13%	123
Auvergne-Rhône-Alpes	2,017	23%	149,700	12%	74
Centre-Val de Loire	539	6%	123,100	10%	228
Bourgogne-Franche-Comté	549	6%	34,800	3%	63
Others régions	2,338	26%	138,380	11%	59
Mainland France	8,826	-	1,150,000	-	130

* Farms with at least 1 goat.

GOAT MILK PRODUCTION IN FRANCE

GOAT MILK PRODUCTION

Source: Estimates by GEB-Institut de l'Élevage according to Agreste

in millions of liters	2010	2015	2020	2021	2022	2023*
Goat milk	648	595	669	697	714	709
- of which delivered to milk factories	80%	77%	76%	74%	73%	74%
- of which processed on farm	19%	22%	24%	26%	27%	26%

* GEB-Institut de l'Élevage estimates.

REGIONAL DISTRIBUTION OF THE MILK PRODUCTION DELIVERED AND PROCESSED ON FARM IN 2023

Source: Estimates by GEB-Institut de l'Élevage according to Agreste

in millions of liters	Regional production	% of French production	Delivered milk	% of French deliveries	Milk processed on farm	% of French on-farm processed milk
Nouvelle-Aquitaine	245	35%	217	42%	25	13%
Pays de la Loire	122	17%	101	20%	13	7%
Occitanie	87	12%	67	13%	20	11%
Auvergne-Rhône-Alpes	78	11%	51	10%	27	14%
Centre-Val de Loire	93	13%	38	7%	54	29%
Others	84	12%	40	8%	48	26%

EVOLUTION OF ORGANIC GOAT MILK PRODUCTION IN FRANCE

Source: GEB-Institut de l'Élevage according to Agreste, FranceAgriMer and Agence Bio

	2010	2015	2021	2022	2023
Number of farms	500	810	1,370	1,480	1,540
of which: farms delivering milk	25	47	180	191	177
Number of goats	28,000	48,140	104,560	115,580	117,340
Organic milk delivered (1000 l)	1,100	4,179	22,126	26,531	25,847
Organic cheese made by factories (t)	372	967	2,287	2,246	1,490*

*Forecast.

INSEMINATION

Source: GEB-Institut de l'Élevage according to CapGènes

	2010	2020	2021	2022	2023
Number of inseminations	82,200	65,500	70,648	67,534	67,000
Alpine breed	49,300	41,900	47,334	43,897	44,890
Saanen breed	32,900	23,560	23,313	23,636	22,110

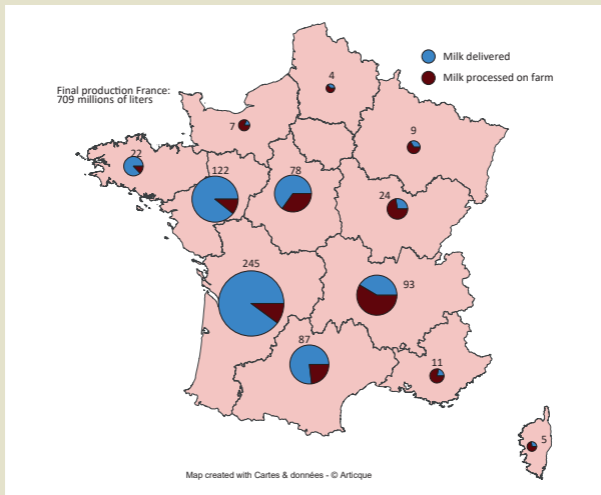
AVERAGE MILK YIELD

Source: GEB-Institut de l'Élevage according to Eliance

	2015	2020	2021	2022	2023
Number of lactations	262,854	232,915	235,778	233,461	226,442
Lactations/herd	171	158	161	159	156
Milk (kg/goat)	925	989	992	1,002	1,023
Lactation length (days)	301	321	321	327	332
Protein content in g/kg	32,7	33,4	33,6	34	34
Fat content in g/kg	36,7	37,6	37,7	38	37
Number of herds	1,540	1,473	1,457	1,466	1,456

REGIONAL GOAT MILK PRODUCTION IN FRANCE IN 2023

Source: Estimates by GEB-Institut de l'Élevage according to Agreste



SUPPLY OF THE DAIRY INDUSTRY AND GOAT MILK PROCESSING

SUPPLY OF THE DAIRY INDUSTRY

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

millions of liters of milk	2010	2020	2021	2022	2023
Milk collected by the industry	509	502	508	518	514
Imports	53	58	71	71	54
Total supply of the dairy industry	562	560	579	589	568

PRODUCTION OF GOAT CHEESE BY DAIRY FACTORIES

Source: GEB-Institut de l'Élevage according to FranceAgriMer and Agreste

in tonnes	2010	2020	2021	2022	2023
All goat cheeses	89,156	99,237	97,644	98,944	96,852
Of which: fresh cheese	17,489	20,719	20,471	20,068	18,906
Of which: mature cheese	71,667	78,518	77,549	79,683	77,945
of which: log-like shaped cheese	49,569	55,288	54,699	54,326	54,659

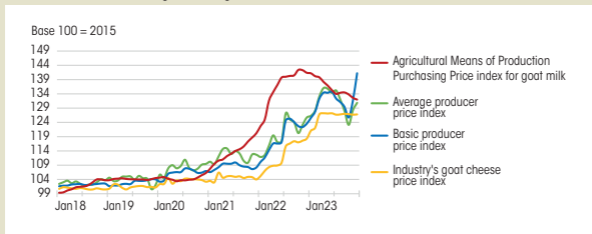
GOAT MILK PRODUCER PRICE FOR DELIVERERS

Source: GEB-Institut de l'Élevage

in €/1 000 l	Standard milk price (35 fat/30 protein)			Average payed price		
	2021	2022	2023	2021	2022	2023
France	694	763	842	771	825	900

EVOLUTION OF GOAT MILK PRICE INDICES, INDUSTRIAL PRICES AND GOAT MILK AGRICULTURAL MEANS OF PRODUCTION PURCHASING PRICE INDEX

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



CHEESE PROCESSED ON FARM IN 2023

Source: Estimates by GEB-Institut de l'Élevage according to Agreste

Milk processed on farm: **around 184 millions de litres.**

Quantity of cheese processed on farm: **24-28,000 tons (estimates by GEB).**

GOAT MILK CHEESE, WITH PROTECTED DESIGNATION OF ORIGIN (PDO)

Source: GEB-Institut de l'Élevage according to INAO

Total production	2021 production	2022 production	% of total goat PDOs	% of on farm processed cheese
Banon	98	97	1%	15%
Brousse du Rove	16	16	0%	100%
Chabichou du Poitou	281	293	4%	17%
Charolais	111	135	2%	54%
Chavignol	852	836	11%	26%
Chevroilin	80	80	1%	100%
Mâconnais	107	84	1%	8%
Pélarion	293	282	4%	59%
Picodon	562	561	8%	28%
Poulligny Saint-Pierre	244	198	3%	35%
Rigotte de Condrieu	62	57	1%	53%
Rocamadour	1,357	1,308	18%	31%
Sainte-Maure de Touraine	1,940	1,922	26%	19%
Selles-sur-Cher	1,145	1,117	15%	17%
Valençay	329	322	4%	23%
Total	7,460	7,292	-	26%

GOAT CHEESE MARKETS

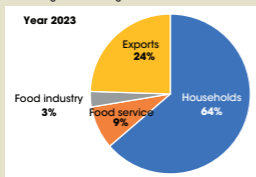
GOAT CHEESES PRODUCED IN 2023

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

	Quantity (t)	% of the total	Evolution 2023/2022
All cheeses	96,886	-	-2%
- of which fresh cheese	18,907	19.5%	-6%
- of which matured cheese	65,845	68.0%	-2%
- of which log-shaped	47,513	49.0%	=
- of which "crottins"	4,565	4.7%	-2%
- of which round cheese	1,775	1.8%	-2%
- of which pyramids	170	0.2%	-18%

GOAT CHEESE'S MARKETS

Source :Estimates by GEB-Institut de l'Élevage according to FranceAgriMer



PURCHASES OF GOAT CHEESE ON SUPERMARKETS' SELF-SERVICE AREAS

Source: GEB-Institut de l'Élevage according to Circana

	2022	2023	% of change 2023/2022
Purchases (quantity, t)	51,108	50,754	-0.7%
Purchases (value, 1,000 €)	656,632	712,061	+8.4%
Average price (€/kg)	12.8	14.03	+9.6%

EVOLUTION OF THE SHARE OF MAIN BRANDS AND RETAILERS' BRANDS IN SUPERMARKETS' SELF-SERVICE AREA SALES

Source: GEB-Institut de l'Élevage according to Circana

Quantity (of total)	2021	2022	2023
National brands	24,083 (47%)	23,626 (46%)	22,594 (44%)
Retailers' brands	22,270 (43%)	23,023 (45%)	23,983 (47%)
Other brands	5,192 (10%)	4,604 (9%)	4,226 (9%)

FOOD SERVICE'S SALES - 2023

Source: GEB-Institut de l'Élevage according to Cniel X GIRA Food Services

	2021	2022	2023
Volume (t)	6,244	7,766	7,825
Value (1,000 €)	61,685	83,350	93,296
Average price without VAT (€/kg)	9.88	10.99	11.92

EXPORTS OF GOAT CHEESE

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

	2021	2022	2023
Exports (t)	24,363	25,147	23,723

GOAT MEAT

EVOLUTION OF GOAT MEAT PRODUCTION AND GROSS INDIGENOUS CONSUMPTION

Source: GEB-Institut de l'Élevage according to Agreste

	2010	2020	2021	2022	2023
Production (1000 head)	817	669	651	649	624
Production (tonnes cwe)	6,850	6,132	6,217	6,247	5,968
Consumption (tonnes cwe)	5,077	5,275	5,430	5,712	5,026

GOAT MEAT PRODUCTION IN 2023

Source: GEB-Institut de l'Élevage according to Agreste

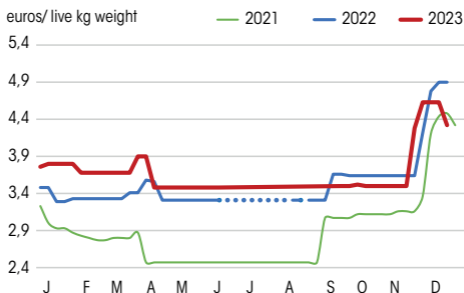
	Production (1000 head)	Production (tonnes cwe)	Carcass weight (kg)
Kids	481	2,742	5.7
Goats	143	3,226	22.5

LIVE KID PRODUCER PRICE (€/KG)

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

	2010	2020	2021	2022	2023
Easter period (weeks 9 to 19)	2.81	2.72	2.62	3.38	3.64
Maximum Easter price	3.20	3.20	2.87	3.58	3.90
Christmas period (weeks 45 to 52)	3.65	3.30	3.47	4.01	4.12
Maximum Christmas price	4.27	4.20	4.48	4.90	4.63

Evolution of the live kid price



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

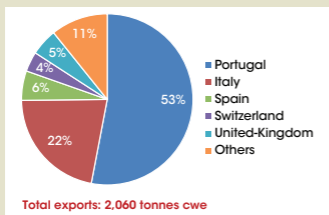
TRADE IN LIVE GOATS AND GOAT MEAT

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

	2010	2021	2022	2023
Live animals (excl. Reproductive - head)				
- Imports	432	239	483	2,014
- Exports	1,980	2,728	3,647	5,491
Goat meat (tonnes cwe)				
- Imports	820	1,499	1,451	1,226
- Exports	2,590	2,286	2,026	2,060

FRENCH EXPORTS OF GOAT MEAT 2023

Source: GEB-Institut de l'Élevage according to Eurostat



GOATS IN EUROPE AND IN THE WORLD

HERD, MILK AND MEAT PRODUCTION IN THE MAIN EU COUNTRIES

Source: GEB-Institut de l'Élevage according to Eurostat (and estimates)

	Goat herd (1,000 head)		Milk production (1,000 tonnes)		Meat production (1,000 tonnes cwe)	
	2010	2022	2010	2022	2010	2022
European Union (27)*	13,300	11,262	2,250	2,500*	60*	44*
Greece	4,460	2,960	395	352	35.6	17.1
Spain	2,900	2,464	520	482	10.6	11.1
Romania	1,241	1,483	220	222	-	-
France	1,450	1,310	670	743	6.9	6.3
Italy	980	1,010	50	60	1.2	1.6
the Netherlands	380	570	180	445	1.4	2.7
Bulgaria	360	184	60	26	-	-
Cyprus	310	250	30	35	2.3	2.6
Portugal	420	352	30	30	0.9	0.9
Germany	150	159	35	-	0.4	0.4

* Estimates by GEB.

WORLD GOAT HERD

Source: GEB-Institut de l'Élevage according to FAOStat

(million head)	2005	2010	2020	2022
World	851	918	1,122	1,145
- Of which Asia	500	511	572	581
of which India	132	137	132	150
of which China	152	151	145	132
- Of which Africa	291	349	490	506
- Of which Americas	38	37	39	39
- Of which Europe	18	18	16	15

WORLD GOAT MILK PRODUCTION

Source: GEB-Institut de l'Élevage according to FAOStat

1,000 tonnes	2005	2010	2020	2022
World	14,536	14,972	19,178	19,192
- Of which Asia	7,477	7,525	10,688	10,842
of which India	3,790	4,594	6,262	6,248
of which China	256	277	233	231
- Of which Africa	3,741	3,966	4,531	4,465
- Of which Americas	729	771	811	828
- Of which Europe	2,589	2,704	3,156	3,057

WORLD GOAT MEAT PRODUCTION

Source GEB-Institut de l'Élevage according to FAOStat

1,000 tonnes	2005	2010	2020	2021
World	4,785	5,256	6,179	6,367
- Of which Asia	3,453	3,764	4,499	4,630
of which India	502	522	556	550
of which China	1,719	1,992	2,504	2,489
- Of which Africa	1,052	1,195	1,436	1,472
- Of which Americas	123	133	137	135
- Of which Europe	136	135	89	100

• EU-27 CAP agricultural support: goat coupled support

Animal coupled supports have been modified with the CAP reform implemented in 2023, and the allocated budget decreases every year. But for the goat coupled aid, there has been little change. **Its amount was 14.82 euros/goat in 2023.**

Eligible animals: eligible goats must be at least 12 months old or have given birth by May 10th, 2024. The declared herd must be maintained on the farm from February 1st to May 10th, 2024 included.

Limits: goat aid is paid for a herd of at least 25 goats and is subject to a maximum of 400 goats per farm (with application of the French transparency for "GAEC" societies).

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GEB-Institut de l'Élevage, 149 rue de Bercy, 75595 Paris Cedex 12



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