



Mediterranean sheep and goats production: An uncertain future[☆]

M. de Rancourt^{a,*}, N. Fois^b, M.P. Lavín^c, E. Tchakérian^d, F. Vallerand^e

^a *Ecole Supérieure d'Agriculture de Purpan – ESAP, 75 Voie du TOEC, 31076 Toulouse Cedex 3, France*

^b *Instituto Zootecnico e Caseario per la Sardegna – IZCS, Olmedo, Sardinia, Italy*

^c *Consejo Superior de Investigaciones Científicas – CSIC, Leon, Spain*

^d *Institut de l'Élevage, Montpellier, France*

^e *Thessalie University, Volos, Greece*

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Abstract

European sheep and goat production, in the Mediterranean areas represent important economic, environmental and sociological issues. Our article aims at comparing the situation of the main small ruminant systems in South European regions (Spain, France, Italy and Greece), and their possible future evolution.

On the average, the income of milk systems tends to be higher than meat systems thanks to a good market price. Moreover, the dependence on subsidies is greater in meat systems and in extensive systems. However, milk systems seem more sensitive to the market situation for example, Italian products in the USA and products from Greece with respect to certain foreign companies.

Sheep and goat production, being frequently the only possible enterprises in less favoured areas, are often fundamental to maintaining social activities and to keep the vegetation out of danger from fire. However, in Greece and Spain some intensive systems are becoming established in the more fertile plain areas.

The roads to success are rather uncertain considering the new CAP reform as nearly all these systems seem to be dependent on the important European subsidies. Nevertheless, we have identified different ways to progress according to systems and regions. Such an uncertain future could be easier to forecast if those involved in the sheep and goat sectors worked more collectively in Europe.

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* Corresponding author. Tel.: +33 561 15 30 47;
fax: +33 561 15 30 60.

E-mail address: michel.derancourt@esa-purpan.fr
(M. de Rancourt).

1. Introduction

European sheep and goat production are important economic, environmental and sociological issues for Mediterranean countries.

The analysis of the small ruminant production systems is difficult because of their great diversity regarding:

- the *species* used: sheep, goats or sheep and goats;
- the *production*: milk, meat or milk and meat;
- the intensity of the *land used*: from zero-grazing to very extensive pastoral systems.

However, it is important to carry out European analyses of this sector, as the great diversity and the low political weight which these sector of production have at the European level do not encourage European studies.

According to this context, our article aims at comparing the situation of the main small ruminant systems in certain Mediterranean countries, namely Spain, France, Italy and Greece, and their possible future evolution.

We will start by an analysis of the flocks (importance, distribution and evolution), then we will try to describe the main production systems. Thirdly, the economic efficiency will be compared followed by the important link with the environment. Our last part will be focused on future considerations based on the effects of the CAP on those systems, which are highly dependent on public subsidies.

2. Flocks and evolution

We will analyse the flock situation and the evolution at the European level before going into greater detail for the different countries studied.

2.1. Situation of European flocks

At the European level, the milk sheep and goat populations are almost exclusively confined to the Mediterranean countries. Few milk sheep or goat production units are to be found in significant numbers outside the Mediterranean regions, as is the case for the important goat region in the Central West part of France,

some goat production is starting to develop in The Netherlands and milk sheep systems traditionally exist in Slovakia, for example.

Considering the size of the national populations, we can state that (see Table 1): Greece and Italy are leaders in milk sheep flocks, Spain is a leader in meat sheep flocks and Greece is a leader in goat flocks.

In the European Union, Spain has recently become a leader in sheep flock number (ahead of UK) and Greece has been a leader in goat flocks for a long time. Moreover, the small ruminant sector is the only European animal sector economically lead by a Mediterranean country: Spain represents 29%, UK 25% and Greece 13% of the European sheep and goat output (MAPA, 2002). In spite of this leadership, we must not forget that the sheep and goat sector, representing only 2.1% in 2002 of the agricultural output, is on a secondary level of production in Europe.

The European sheep population decreased by 1.6% between 1st January 2003 and 2004 and there has been a continuous downward trend since 1998. This decline is supposed to drop again during 2004 by 1.2% (Harley, 2004). The European goat population decreased by 2% between 1st of January 2003 and 2004. The changes in the main countries are: -1.9% in Greece, -3.1% in Spain and +1.7% in France.

The European goat population is supposed to have increased slightly in 2004 (+0.1%), thanks to an increase of 1.1% of the Greek population, which represents 56% of the EU 15 goat population (Harley, 2004).

Concerning the genetic potential, it should be highlighted that the diversity of small ruminant breeds is very important in Mediterranean countries, especially in France and Italy for sheep breeds and in Spain and Italy for goat breeds (see Table 2).

This genetic diversity may be a strength to adapt to the diverse natural conditions of Europe and, moreover, if the Mediterranean small ruminant farmers want to develop export of genetic material.

Table 1
Importance of small ruminant populations in the EU Mediterranean countries

Females on 1st January 2004 ($\times 1000$)	Spain	France	Italy	Greece	Slovenia
Milk sheep females	2900	1600	5700	6100	4
Meat sheep females	14600	5200	1400	400	70
Goat females	2200	1100	800	3900	20

Source: Eurostat (2004).

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