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Y COMPETITIVIDAD



Challenges for European sheep and goat sector: participative identification and prioritization

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ISAGE workshop.

13 December 2019, Zaragoza, Spain



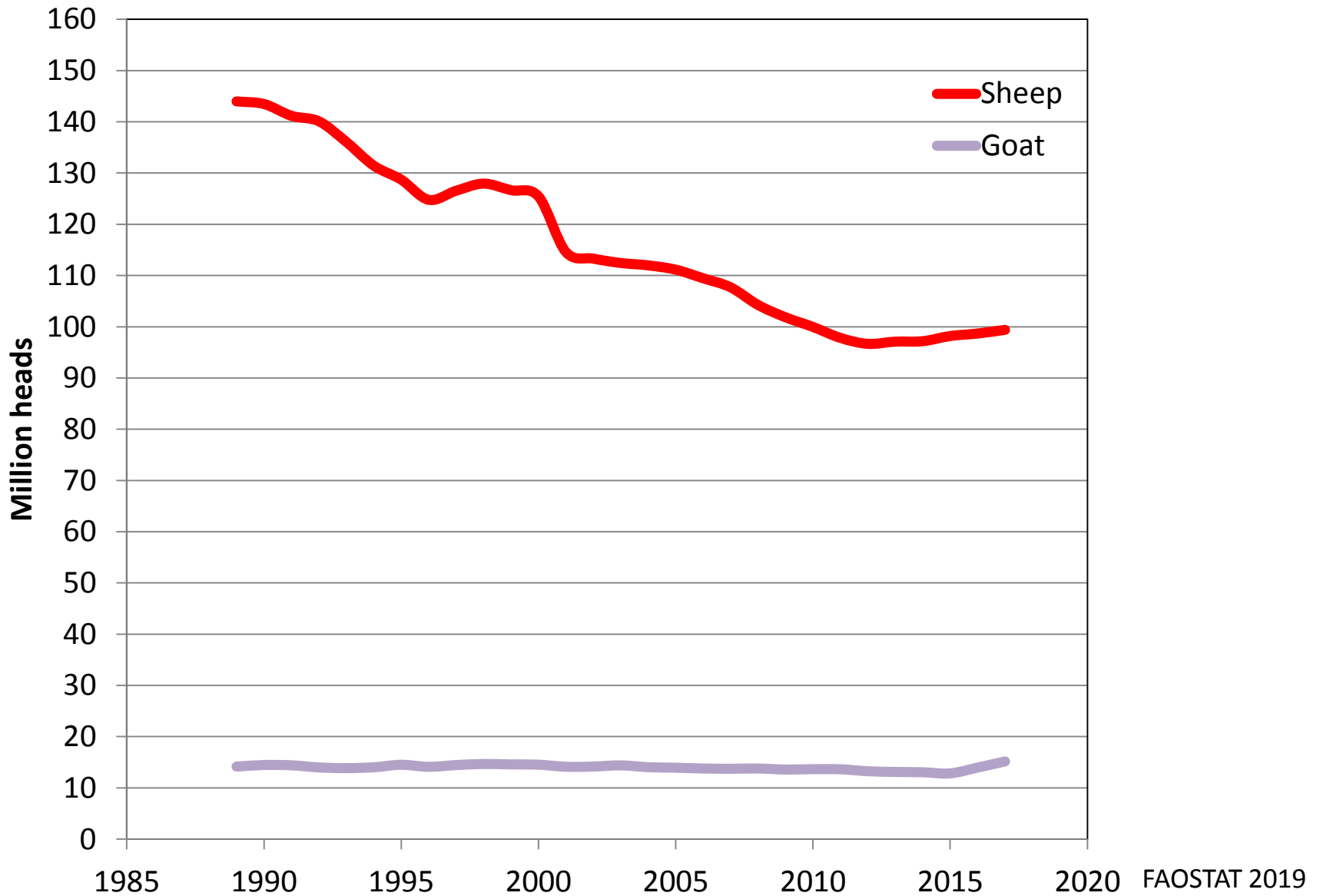
Innovation for Sustainable
Sheep and Goat
Production in Europe



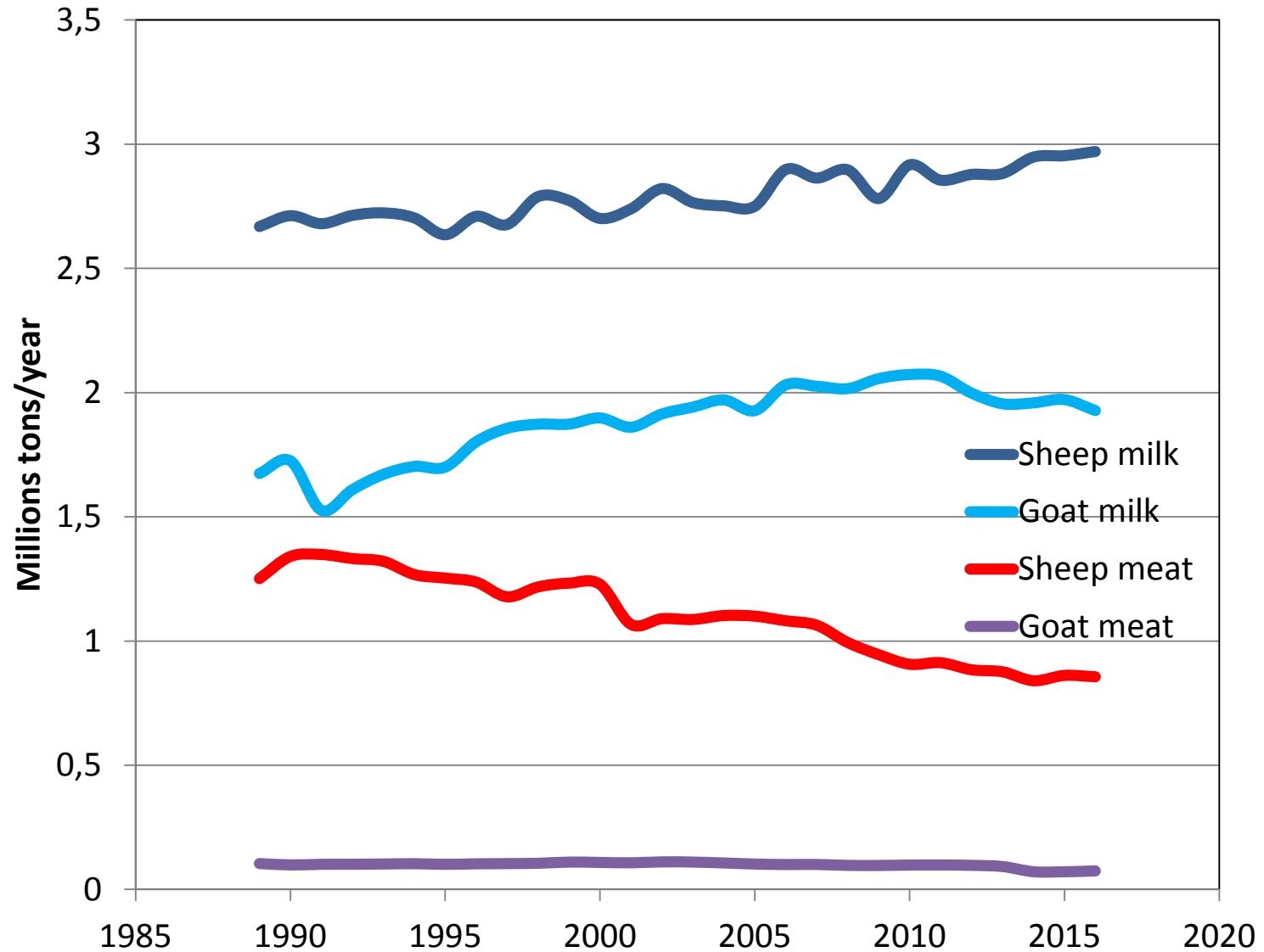
Small ruminant EU sector importance

- 6% of the meat and 3% of the milk production value in EU
- 850.000 sheep farms (14% of the livestock farms in EU)
- 450.000 goat farms (7% of the livestock farms in EU)
- Most farms are located disadvantaged rural areas and provide employment and social cohesion

European sheep and goat census



Small ruminant production in Europe



Objectives

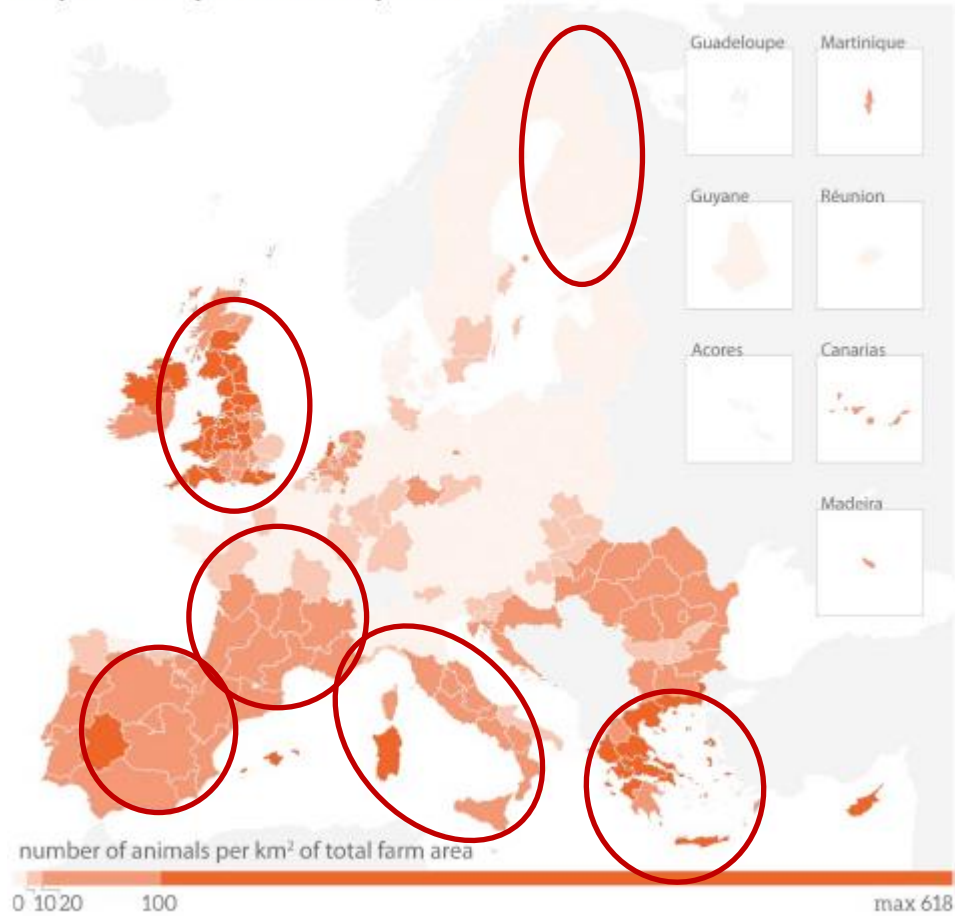
- Identify the key challenges of the small ruminant EU sector
- Prioritize them
- Identify key stakeholder to address the challenges



Participative approaches

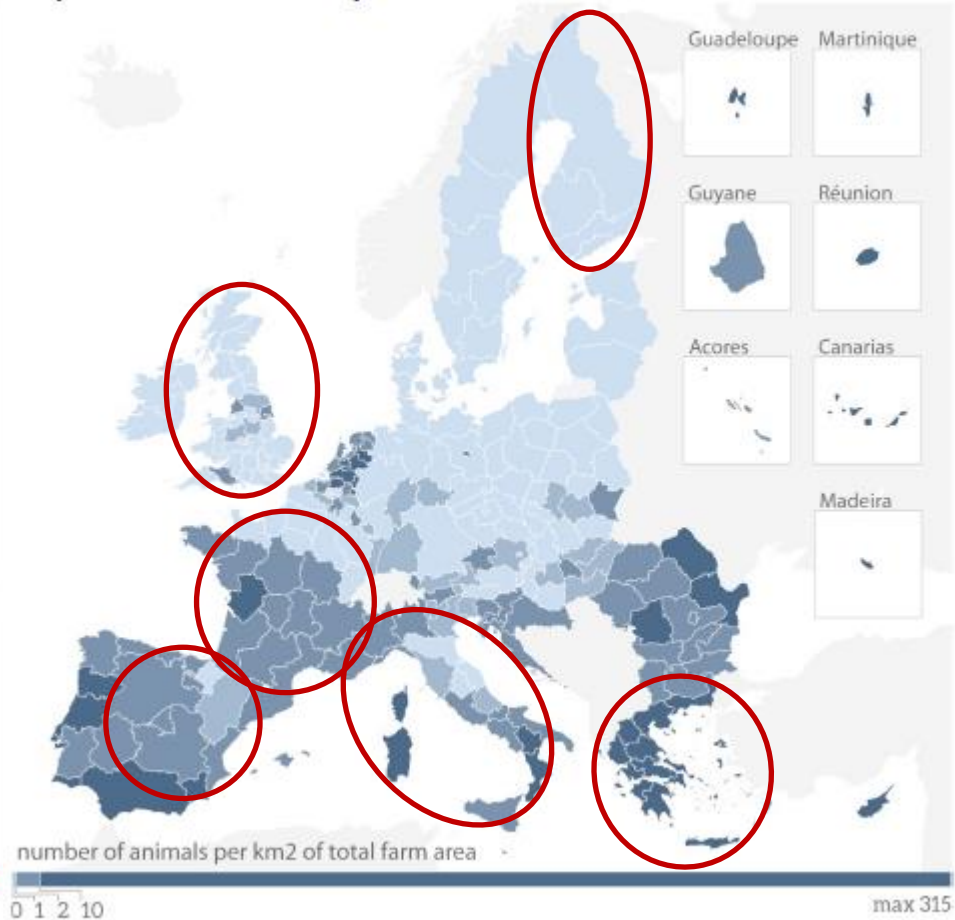
Sheep and goat distribution & iSAGE coverage

Map 1 – Sheep flock density in the EU



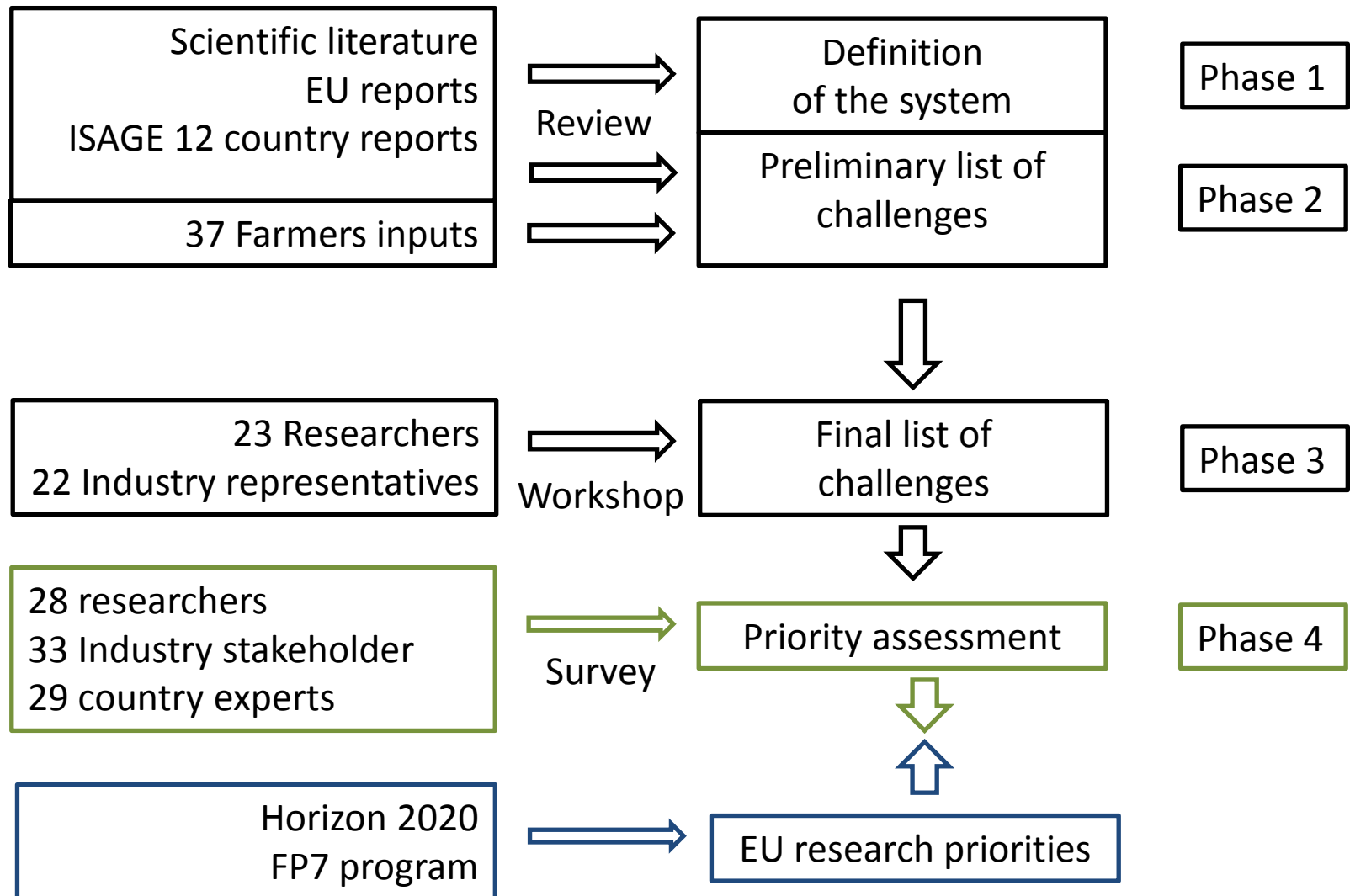
Data source: Eurostat, [Farm structure survey](#), 2013.

Map 2 – Goat herd density in the EU



Data source: Eurostat, [Farm structure survey](#), 2013.

Multi-stakeholder approach



Sector INTERNAL CHALLENGES

FARM

Slow adoption of innovations
Poor business management training
Lack of professionalization

FARMING SYSTEM

Low promotion of local breeds
Low adaptability of high productive breeds
Low integration of livestock and agriculture

SECTOR

Sector fragmentation / Lack of integration
Low cooperation between farmers
No attractive to young farmers
Low female involvement

OVERARCHING

Animal health issues
High subsidy dependency
Low competitiveness

Sector EXTERNAL THREATS

SOCIETY

Low consumer education in local products
Farmer role unrecognised by society
Low social knowledge about farming
Poor recognition of farming public services
Low consumer demand

POLICY

Uncertainty in future subsidies
EU policy without scientific evidence
Environmental policy against intensification

SCIENCES

Researchers not address real problems

MARKET

Market monopolised
Unfair trade / Lack of traceability
Uncertainty of meat and milk prices
Volatility of commodity prices

ACCESS TO PRODUCTION FACTORS

Limited access to land
Limited access to capital

ENVIRONMENT

Wildlife conflicts
Climate change threats

Priority assessment

- What is the relevance for the midterm viability of your production system

Very low	Low	Medium	High	Very high
1	2	3	4	5

- How easy/difficult is to address?

Very difficult	Difficult	Medium	Easy	Very easy
1	2	3	4	5

- Relevant stakeholder to address the challenge

Farmers	Associations of producers	Processing industry	Retailers	Consumers	Academia	Government
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Priority assessment

REGION

- Southern EU (69)
 - Spain (37)
 - Greece (18)
 - Turkey (8)
 - Italy (6)
- Northern EU (21)
 - France (14)
 - UK (7)

Stakeholders

- Industry (33)
 - Breeding associations
 - Farm cooperatives
 - Farmer institutions
- Experts (57)
 - Researchers
 - Nat. Advisory Committees

PRODUCT

- Dairy (61)
- Meat (29)

SPECIES

- Sheep (60)
- Goats (30)

SYSTEM

- Intensive (25)
- Semi-intensive (31)
- Extensive (34)

		Rank	Relevance
INTERNAL CHALLENGES			
No attractive to young farmers	SECTOR	4	4.05
High subsidy dependency	OVERARCHING	5	4.03
Low cooperation between farmers	SECTOR	13	3.59
Low promotion of local breeds	FARMING	15	3.57
Poor business management training	FARM	16	3.53
Low competitiveness	OVERARCHING	17	3.53
Sector fragmentation / Lack of integration	SECTOR	19	3.51
Lack of professionalization	FARM	20	3.48
Low integration of livestock and agriculture	FARMING	21	3.42
Slow adoption of innovations	FARM	22	3.4
Low adaptability of high productive breeds	FARMING	27	3.14
Low female involvement	SECTOR	28	3.13
Animal health issues	OVERARCHING	30	2.80
EXTERNAL CHALLENGES			
Uncertainty of meat and milk prices	MARKET	1	4.28
Volatility of commodity prices	MARKET	2	4.11
Difficult access to capital	P.FACTORS	3	4.08
Uncertainty in future changes in subsidies	POLICY	6	3.97
Low social knowledge about farming	SOCIETY	7	3.84
Low consumer education in local products	SOCIETY	8	3.81
Unfair trade / Lack of traceability	MARKET	9	3.76
Climate change threats	ENVIRONMENT	10	3.73
Farmer role unrecognised by society	SOCIETY	11	3.68
Poor recognition of public services of farming	SOCIETY	12	3.62
Market monopolised	MARKET	14	3.58
Limited access to land	P.FACTORS	18	3.52
Low consumer demand	SOCIETY	23	3.39
EU policy without scientific evidence	POLICY	24	3.32
Environmental policy against intensification	POLICY	25	3.16
Researchers not address real problems	SCIENCES	26	3.15
Wildlife conflicts	ENVIRONMENT	29	3.10



		Rank	Priority index
FARM INTERNAL CHALLENGES			
Low promotion of local breeds	FARMING	2	10.04
Poor business management training	FARM	4	9.52
Lack of professionalization	FARM	7	9.08
Slow adoption of innovations	FARM	8	8.86
Low adaptability of high productive breeds	FARMING	9	8.74
Low competitiveness	OVERARCHING	13	8.37
Low integration of livestock and agriculture	FARMING	14	8.36
High subsidy dependency	OVERARCHING	15	8.24
Low cooperation between farmers	SECTOR	18	7.85
No attractive to young farmers	SECTOR	20	7.75
Low female involvement	SECTOR	24	7.44
Animal health issues	OVERARCHING	25	7.18
Sector fragmentation / Lack of integration	SECTOR	26	7.01
FARM EXTERNAL THREATS			
Low consumer education in local products	SOCIETY	1	10.91
Low social knowledge about farming	SOCIETY	3	9.74
Researchers not address real problems	SCIENCES	5	9.37
Unfair trade / Lack of traceability	MARKET	6	9.32
Poor recognition of public services of farming	SOCIETY	10	8.72
Uncertainty in future changes in subsidies	POLICY	11	8.70
Farmer role unrecognised by society	SOCIETY	12	8.66
EU policy without scientific evidence	POLICY	16	8.16
Environmental policy against intensification	POLICY	17	8.10
Uncertainty of meat and milk prices	MARKET	19	7.78
Low consumer demand	SOCIETY	21	7.53
Difficult access to capital	P.FACTORS	22	7.51
Limited access to land	P.FACTORS	23	7.50
Volatility of commodity prices	MARKET	27	6.83
Wildlife conflicts	ENVIRONMENT	28	6.80
Market monopolised	MARKET	29	6.76
Climate change threats	ENVIRONMENT	30	6.28

	Government	Farmers	Associations	Academia	Processing	Consumers	Retailers
		of producers			industry		
	27	27	23	22	0	1	0
	29	25	25	12	5	2	2
	28	21	28	17	6	0	0
	21	27	26	19	6	1	1
	15	24	24	34	2	0	0
	16	24	16	7	16	7	14
	32	26	21	15	2	3	1
	43	20	20	4	3	8	1
	7	49	40	1	1	0	1
	28	23	30	6	5	6	2
	31	29	28	7	1	3	0
	15	33	22	29	0	1	0
	10	26	30	4	20	2	7
	29	7	22	10	14	10	8
	21	12	23	17	6	15	7
	20	19	20	33	5	2	2
	23	12	17	4	19	10	15
	36	20	13	11	3	15	2
	48	18	14	10	3	6	1
	19	19	18	11	9	16	8
	50	2	16	31	0	1	0
	44	13	18	17	6	1	1
	19	13	12	3	25	8	21
	7	9	11	8	21	22	22
	33	16	15	7	13	6	10
	55	21	19	5	0	0	0
	28	13	9	1	27	8	14
	39	29	13	12	0	6	0
	26	12	13	2	20	6	21
	28	20	15	25	9	2	2

CHALLENGES RELATIVE PRIORITY

INTERNAL CHALLENGES	South	Central	<i>P</i>
ALL	8.6	7.4	**
SECTOR LEVEL	7.8	6.7	†
Sector fragmentation / Lack of integration	7.4	5.6	*
Low cooperation between farmers	7.8	7.8	ns
No attractive to young farmers	8.1	6.8	ns
FARM LEVEL	9.6	7.6	***
Slow adoption of innovations	9.4	7.0	***
Poor business management training	9.8	8.6	ns
Lack of profesionalization	9.7	7.2	**
OVERARCHING	8.0	7.9	ns
Animal health issues	6.8	8.3	*
High subsidy dependency	8.3	8.2	ns
Low competitiveness	8.7	7.4	*

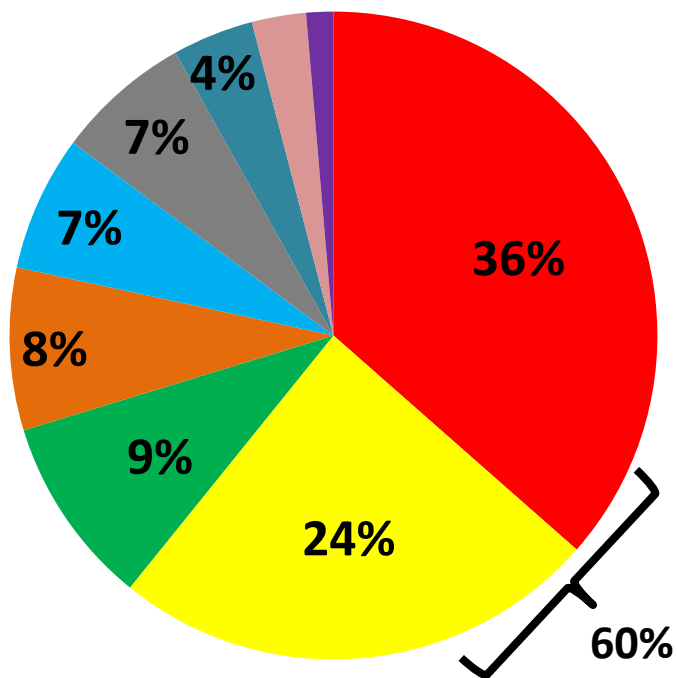
EXTERNAL CHALLENGES

EXTERNAL THREATS	South	Central	<i>P</i>
ALL	8.5	6.9	***
SOCIETY	9.6	7.6	***
Low consumer education in local products	11.5	8.9	**
Farmer role unrecognised by society	9.4	6.3	**
Low social knowledge about farming	10.3	8.0	**
Low consumer demand	8.0	5.9	*
MARKET	8.1	6.2	**
Unfair trade / Lack of traceability	10.1	6.7	**
Uncertainty of meat and milk prices	8.2	6.3	†
Volatility of commodity prices	7.2	5.7	*
ENVIRONMENT	6.9	5.3	**
Climate change threats	6.7	5.0	*

EU funding (FP7 and H2020)

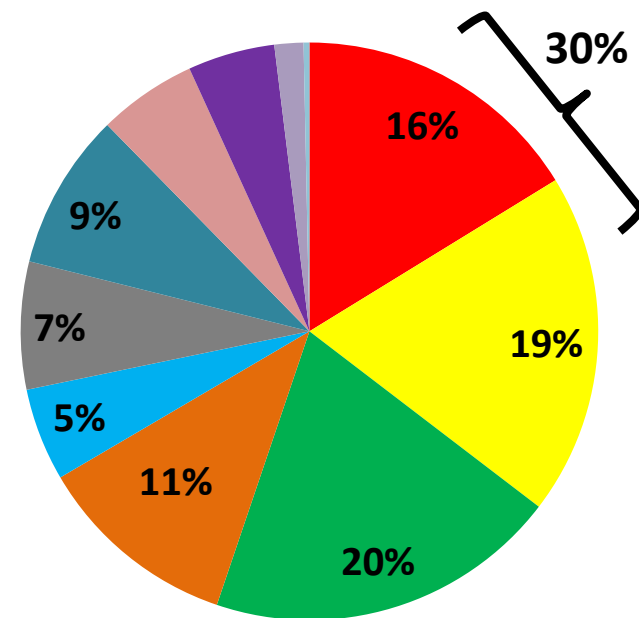
Small ruminants

74 projects



Cattle

308 projects



Take home message

- Most of the sector challenges are common across species, type of product and intensification level. However the geographical region can modulate these challenges.
- The most relevant challenges are mostly external and related with economical aspects. However they are very difficult to address.
- The priority should be focussed on education at different levels (farmers, consumers, researchers and society).
- Government, farmers, association of producers and academia are expected to work together to help facing sector challenges.
- EU should re-think about the research priorities in the small ruminant sector.

Thank you



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