Accepted Manuscript

Title: A European vision for the Small Ruminant sector. Promotion of meat consumption campaigns.

Author: Rodríguez-Serrano T.M. Panea B. Alcalde M.J.

PII: S0921-4488(16)30040-2
DOI: http://dx.doi.org/doi:10.1016/j.smallrumres.2016.02.015
Reference: RUMIN 5156

To appear in: *Small Ruminant Research*

Received date: 28-1-2016
Revised date: 17-2-2016
Accepted date: 19-2-2016

Please cite this article as: Rodríguez-Serrano, T.M., Panea, B., Alcalde, M.J., A European vision for the Small Ruminant sector.Promotion of meat consumption campaigns.Small Ruminant Research http://dx.doi.org/10.1016/j.smallrumres.2016.02.015

A European vision for the Small Ruminant sector. Promotion of meat consumption campaigns.

Rodríguez-Serrano, T.M[a]., Panea, B[b]. and Alcalde, M.J[c*].

[a]INTEROVIC, C/ Agustín de Bethencourt 17, 28003 Madrid, Spain.

[b]Centro de Investigación y Tecnología Agroalimentaria de Aragón (CITA), Avda. Montañana 930, 50059 Zaragoza, Spain.

[c]University of Seville. Dept. of Agroforestry Science, Crta. Utrera km 1, 41013 Seville, Spain. *

Corresponding author: aldea@us.es

Highlights

- The consumption of lamb and kid meat is declining
- Small ruminant production must adapt to current market demands
- Promotion campaigns are necessary to recover the consumption
- New cuts and presentations are promoted

Abstract

Sheep and goat production should adapt to current market demands if its future want to be secure. It is essential that are found ways to improve the competitiveness of the sector in all areas of the supply chain. Society's point of view of the conditions surrounding livestock production is changing, and as a consequence, the Common Agricultural Policy (CAP) has been modified to include new environmentally-orientated requirements of farmers seeking subsidies. Sheep and goat production has the advantage over other types of livestock production in that it predominantly involves extensive production systems, but work is still needed to improve animal health and welfare, and food safety. People's lifestyles are also changing, and the small ruminant sector should work to offer consumers new products presented in new ways, striking a balance between traditional forms of consumption (for example linked to festivities) and modern habits (including the purchasing of convenience products).

Keywords: sheep; goat; consumption; development

The small ruminant sector within the European Union

In 2014, Germany, Spain, France and the UK had the largest numbers of livestock of all EU nations. Although the sheep and goat sector is small compared to the beef or poultry sectors, it is nonetheless important in almost all states of the Union, especially in the UK and Spain (16.4%) which alone account for 56.1% of all EU-28 sheep and goats (39.7% and 16.4%, respectively). Sheep and goats can be important in the maintenance of rural economies and populations, and their production contributes towards the maintenance of agricultural landscapes.

Recent modifications of the Common Agricultural Policy (CAP) include changes to the conditions for the granting of subsidies, which are now also based on environmental issues and landscape maintenance. This could benefit the sheep and goat subsectors, but most Spanish farms working in these areas do not have their own grazing land to manage. In addition, changing market policies could lead to volatility in the price of feed, which could well lead to an increase in production costs.

In the latest reform of the CAP, its funding was maintained by introducing the concept of greening. Currently the CAP represents the second largest outlay in terms of EU expenditure, but the entire budget is to be reviewed in 2017, and the more industrialized countries (with a smaller presence in the primary sector) might try to reduce the sums it receives. It therefore behoves countries with larger agricultural interests to consolidate the idea of greening-associated financing, which requires improvements be made in terms of animal health and welfare and food safety.

The small ruminant sector in Spain

In 2014, Spain ranked second in the EU in terms of the number of small ruminants production. With nearly 16 million sheep it was second only to the UK, and with a little over 2.5 million goats, only Greece had more heads (MAGRAMA, 2016).

In 2004, small ruminants made up 4.1% of Spain's total livestock production, but by 2014 this had fallen to 2.0% (MAGRAMA, 2016). Numerous studies were conducted to identify the problems behind this decline and suggest appropriate solutions. Based on surveys of people involved in the sector, the Spanish Society for Sheep and Goat Production (SEOC, 2012) reported the weaknesses perceived to include the heterogeneity of farms, low productivity, exposure to high production costs, a low technical level of production, a lack of coordination between the different parts of the supply chain, a lack of generational replacement, great dependence on the weather, rising costs, and the lack of medium-term prospects. The sector's strengths were highlighted as its use of resources not sought after by other livestock species, the positive role of sheep and goat grazing in fire prevention, the broad genetic base available (allowing adaptation to different environments), the tradition attached to these products, and the rural employment generated. The authorities, it was concluded, should try to improve the image of producers, to defend the sector within the EU, develop high-standard sheep and goat health policies, strengthen applied research and the transfer of technology, boost the training of farmers, and stimulate the formation of commercial associations (currently about 30% of farmers) to improve the organization of the supply chain. In short: improve the professionalization of the sector.

Nearly 80% of lamb and kid meat is produced in disadvantaged areas where other types of farming would be difficult, and it remains economically important in such areas. Unlike the raising of other animal species, around which an enormous degree of modernization and industrialization has developed, the intrinsic characteristics of sheep and goat production render it of little interest to large food transforming companies. Although the average number of animals per farm is 120 in meat-producers farms and 202 for milk-producers farms (MAGRAMA 2016), when farmers' incomes became exclusively from sheep and goat production, herds are usually more than 500 animals (Interovic, 2016). The production and marketing of sheep and goats therefore remains fragmented, and the sector insufficiently well-structured and organized for any long-term strategy to be proposed that might allow development in a planned manner. As a result - and unlike that seen for other meat products - the production and marketing of lamb and kid meat still follows traditional patterns that are not well adapted to meet the needs of modern society.

Consumption of lamb and kid meat, and promotion campaigns

Statistics show there has been a fall in the consumption of lamb and kid meat of around 8% annually, accumulating a decline of around the 50% in the last 7 years (from 2.7 kg per capita in 2006 to 1.7 kg per capita in 2014) (MAGRAMA, 2016). The high cost of feed, especially for sheep, has resulted in high prices for the meat products derived thereof, and consequently in a fall in demand (Campo, Olleta & Sañudo, 2008). Whereas some studies conclude that price, rather than food safety, quality or traceability, has been the most important factor in this decline (du Plessis & du Rand, 2012), others indicate it to have been the least important when compared to country of origin and feeding system (Bernabéu & Tendero, 2005; Font i Furnols et al., 2011; Realini et al., 2013). Gracia and de Magistris (2013) showed that Spanish lamb consumers can be grouped into two clusters: one encompassing consumers not willing to pay a premium based on origin and feeding system, and one encompassing those who are. Similarly, Font i Furnols et al. (2011) reported that Spanish consumers could be divided into three clusters: cluster 1 includes those who believe the origin of the meat to be the most important factor in the decision to purchase, cluster 2 includes those for whom the feeding system is the most important factor, and cluster 3 includes those who are most influenced by price. Producers and retailers need to take into account these differences in order to offer consumers the meat they are looking for.

Another major problem affecting consumption is that most lamb and kid products are offered in traditional presentations, such as entire pieces. These can be difficult and time-consuming to cook and have fallen from favour with consumers who more and more often are looking for convenience products (Bernués et al., 2012).

Moreover, some studies in developed markets, such as those of the UK (Eblex, 2016*),* France (Interbev, 2016) and Spain (Interovic, 2016), show that the average age of lamb consumers is over 45-50 years. Young consumers may be unfamiliar with lamb because they do not have time to cook it; current lifestyles can make cooking a low priority for many consumers.

In Europe, several initiatives have tried to solve these problems. The first, undertaken during the late 1990s, was the UK's "Quick Lamb" campaign that encouraged the consumption of well-presented meat, ready-cut for cooking and thus better adapted to a modern way of life. Falling consumption in France, the main market for the UK and Irish lamb, spurred all three countries to launch another campaign in 2007 known as "*Agneau Presto*". This continued the "Quick Lamb" campaign's philosophy, but tried to reach more people through special activities and a public relations effort involving different media including the Internet. Promotional materials were offered at points of sale in order to generate consumer interest, and independent retailers and other professionals were trained in their distribution so that consumers might easily access them.

In 2015, two campaigns co-financed by the EU and national governments were launched, one in the UK, Ireland, France, Belgium, Denmark and Germany, and the other in Spain (together covering about two-thirds of the EU's lamb-consuming population). The first of these, known as "Tasty, Easy, Lamb" (www.tastyeasylamb.co.uk) had the goal of conveying the environmental and economic importance of lamb production. It sought to showcase lamb as a meat for daily consumption, trying to give the impression of it being quick and easy to cook. The Internet was the main channel of communication, the aim being to reach young consumers. The "Rediscover your meat" campaign in Spain (www.canalcordero.com), developed by sheep-goat inter-professional organization, which represent over 80% of the economic value of the sector, sought to convey the idea that lamb meat is a natural, almost 'hand-made' product of rural areas, with animals raised under extensive conditions. It focused on showing the benefits of all this to society. The campaign had two parts. The first pursued the recovery of consumption among older people, i.e., the traditional use of joints more time-consuming to cook (communicated via television, an effective way of reaching large numbers of consumers). The second aimed to capture the attention of young consumers through via Facebook and Twitter. In this campaign, new cuts and presentations that could be quickly cooked were advertised, along with the idea that quantities could be purchased that would allow lamb to become a more daily-consumed meat. The proposed new cuts were promoted by training butchers (15,000 from 2015 to 2018) and chefs.

The cuts proposed come from the neck, chest and leg, which were the pieces that were identified as more difficult to sell, based on a survey of 62 butchers. The common cue of new pieces is that all of them are easy to cook, can be grilled, and be sold in size individual ration.

Finally, and behind the benefits that all these actions could to bring, industry must focus in the future to deliver innovative new products such as processed products and ready meals, taken into account trends in the meat consumption patterns.

Conflicts of Interest Statement

The authors whose names are listed immediately below certify that they have NO affiliations with or involvement in any organization or entity with any financial interest (such as honoraria; educational grants; participation in speakers' bureaus; membership, employment, consultancies, stock ownership, or other equity interest; and expert testimony or patent-licensing arrangements), or non-financial interest (such as personal or professional relationships, affiliations, knowledge or beliefs) in the subject matter or materials discussed in this manuscript.

References

Bernabéu, R., & Tendero, A. (2005). Preference structure for lamb meat consumers. A Spanish case study. Meat Science, 71, 464–470.

Bernués, A., Ripoll, G., & Panea, B. (2012). Consumer segmentation based on convenience orientation and attitudes towards quality attributes of lamb meat. Food Quality and Preferences, 26, 211–220.

Eurostat, 2016. http://ec.europa.eu/eurostat/statistics, 2014. (accessed 01.01.16).

Campo, M. M., Olleta, J. L., & Sañudo, C. (2008). Características de la carne de cordero con especial atención al ternasco de Aragón. Agencia Aragonesa de Seguridad Alimentaria. Gobierno de Aragón (Retrieved from: http://www.aragon.es/estaticos/ImportFiles/12/docs/Areas/Seguridad_Agroalimentaria/Agencia_Aragonesa_Seguridad_Alimentaria/Dictamenes_informes/AASA/Caracteristicas/DOCUMENTO_ORIGINAL_CARACTERISTICAS_CARNE_CORDERO.pdf). en: Font i Furnols, M., & Guerrero, L. (2014). Consumer preference, behavior and perception about meat and meat products: an overview. *Meat Science, 98*, 361-371.

Du Plessis, H. J., & du Rand, G. E. (2012). The significance of traceability in consumer decision making towards Karoo lamb. Food Research International, 47, 210–217.

Eblex. (2016). AHDB Beef & Lamb division of the Agriculture and Horticulture Development Board (AHDB). http://beefandlamb.ahdb.org.uk/. (accessed 01.01.16).

Font i Furnols, M., Realini, C., Montossi, F., Sañudo, C., Campo, M. M., Oliver, M. A., Nute, G. R.,

& Guerrero, L. (2011). Consumer's purchasing intention for lamb meat affected by country of origin, feeding system and meat price: A conjoint study in Spain, France and United Kingdom. *Food Quality and Preference, 22*(5), 443-451. doi: http://dx.doi.org/10.1016/j.foodqual.2011.02.007

Gracia, A., & de Magistris, T. (2013). Preferences for lamb meat: A choice experiment for Spanish consumers. Meat Science, 95, 396–402.

Interbev. (2016). Interprofession Betail & Viande. http://www.interbev.fr/. (accessed 01.01.16).

Interovic. (2016). Interprofesional del Ovino y Caprino de Carne. http://www.interovic.es/. (accessed 01.01.16).

MAGRAMA (Ministerio de Agricultura, Alimentación y Medio Ambiente). (2016). Anuario Estadística 2014. Spanish Government, http://www.magrama.gob.es/ (accessed 01.01.16).

SEOC (Spanish Society for Sheep and Goat Production). (2012). INFORME DE LA SOCIEDAD ESPAÑOLA DE OVINOTECNIA Y CAPRINOTECNIA (SEOC) DEL SECTOR OVINO Y CAPRINO EN ESPAÑA: AÑO 2012. http://www.seoc.eu/site/images/documentos/biblioteca_SEOC/otras_publicaciones/seoc_informe_ovino_caprino_2012.pdf

Realini, C. E., Font i Furnols, M., Sañudo, C., Montossi, F., Oliver, M. A. & Guerrero, L. (2013). Spanish, French and British consumers' acceptability of Uruguayan beef, and consumers' beef choice associated with country of origin, finishing diet and meat price. Meat Science, 95, 14–21.