

Pale meat from young ruminants in the Mediterranean. Diversity and common traits. Implications for trade

J.-P. Boutonnet

Institut National de la recherche Agronomique, Unité Mixte Innovation, département SAD, 2 place Viala, 34060 MONTPELLIER CEDEX 1, France

Abstract

The main characteristics of ruminant meat in the Mediterranean area are its colour (pale), the age of animals (young), and the feeding (grain). This livestock systems contribute to maintain rural population in less favoured areas, but is not competitive in terms of price with commodity meats on the global market. Segmentation and promotion of Mediterranean specificity, is the strategy adopted in order to improve the competitiveness of Mediterranean meat producers. Several ways used by farmers and processors are discussed.

Key words: Beef, lamb, competitiveness, market segmentation, quality

Introduction

Due to the bio – climatic characteristics of the Mediterranean area, livestock farming systems are strongly dependant on the environmental conditions. Livestock managers of these regions have had a particular know-how in taking advantage of the diverse landscape available to them : dry range land, fertile and irrigated arable land, forest, high altitude pastures, etc. In this framework, animal products, particularly ruminants meat, come from a range of very diverse systems : extensive systems based on permanent pasture, intensive feed lots, or a succession of extensive and intensive phases in the life of the same animal (Boyazoglu & Flamant, 1990).

As far as milk production is concerned, cattle have not had the same evolution than small ruminants. Local dairy cattle breeds have declined and cattle milk is produced by high potential international breeds such as Holstein, fed intensively. But most of the Mediterranean countries are not self sufficient and import significant quantities of dairy products. On the opposite, local dairy breeds of sheep and goat have been improved, keeping their traits of adaptation to the local conditions. Dairy sheep and goats are a characteristic of the Mediterranean area. Young animals from cattle, sheep, and goat dairy farms are slaughtered as young as possible in order to take milk from the mother.

Suckling livestock farming has kept traditional breeds, well adapted to their environment. They are kept in pastoral, harsh areas, where livestock farming is one of the few activities able to provide some income to rural people. The scarcity of good quality feed does not allow to meet the requirements of both adult females and fattening young animals.

As a result, traditional meat production in these areas comes from young animals, slaughtered as soon as possible. Consumers in these regions have therefore developed a strong preference for a pale colour of the meat, a good tenderness, not strong taste. This is obtained by meat industry from young, light animals. These animals are fattened in large feed lots near harbours or in fertile areas (source of grain), and near the big cities (proximity to the market. They have been bought as store animals, either in the Mediterranean countries, or in Northern part of Europe, in dairy or suckling herds (Boutonnet et al., 2005a).

Recently, and after the crisis which have affected the meat markets, Northern European farming systems are re-orienting their production towards the production of lighter, younger animals, able to satisfy the requirements of Mediterranean consumers. The question is then : Is the Mediterranean meat industry (farmers, abattoirs, wholesalers, retailers, butchers) able to identify, characterise, and promote (at higher prices than the standard) specific meats from the Mediterranean area?

Quality as a mean of market segmentation

According to ISO, quality consists in “Properties and characteristics of a product, a service, or a process, that gives it an aptitude to satisfy needs explicitly or implicitly expressed by the user”. Three consequences can be observed from this definition :

- There are several criteria of quality, dependant from the type of consumer, from the circumstances of consumption, from the season or the place, ...Several types of the same commodity can be present on the same market. The market size can be increased by the availability of several qualities of product at the same time. On a same “commodity” market, there can be several “specialties” (Rama, 2005).
- There is not “good” and “bad” quality, but quality adapted to a particular market.
- The special product does not exist *per se*. For each type of special product, the concerned people have to negotiate the characteristics of the product, the process, the ways of guarantee for the customer. All this negotiation has to take into account the history, the natural conditions, the technical and organisational innovations in the area, etc.

Apart from very short channels, at a local level where consumers know personally small producers, in all other cases, the specific products have to be labelled or branded, in order to make the buyer sure that the product bought is really the expected one. This traceability is necessary to the buyer as a guarantee of the reality of the specificity of the product, and for the seller, as a mean of catching the rent, attached to the specialty product. This rent is the result of the building of a system of “monopoly competition” (Chamberlin, 1933).

In the case of Mediterranean meat, this rent allows higher prices than those of meat as a commodity on the global market. If “Mediterranean” meat is sold as different to the “International” meat, as a segment of the global market, then the concerned people have to agree on the characteristics of the product and of the production process. The **local commodity**, usually bought as “meat” by local consumers, has to become a **global specialty**.

Case studies : specific meat from Mediterranean France

Several strategies are used for building quality schemes, create the rent, and distribute it among the partners of the scheme.

One is the private, individual commercial brand. This brand’s name can be sold or leased. The product can be made anywhere, and using any process (Nobody knows where and how Nestlé products are made nor packaged). The whole rent, if any, is caught by the owner of the brand’s name : agro-food processing company or retailer. The farmers who sell the raw material find it very difficult to participate to the benefits of the market segmentation.

Our research (Boutonnet et al., 2005b) has focussed on three collective particular schemes on meat products in Mediterranean France (Table 1). People concerned have chosen three different ways of building their system of identifying their product and catching the rent.

For “Taureau de Camargue” beef, they have chosen the European sign “Protected Denomination of Origin”. PDO is managed by a group of producers and processors and controlled by a State body : INAO. Characteristics of the product and of the process are defined by law. PDO does not belong to anybody, and everyone who is in the delimited area, and using the requested processes, can use the name. The sign is used for a very special product, coming from a herd reared for races and not for meat. The meat is prized by local consumers. The use of PDO guarantees the higher price (+10 to 15%) returns until the processing company and the farmers. It seems retailers have few benefit from this product, so they are not enthusiastic at selling this product specially in the supermarkets.

For “Agneau El Xai” lamb, the farmers, grouped in a co-operative company, started several years ago by a commercial brand. But their very specific product, traditional in the region, was imitated by some meat-wholesale companies, buying lambs elsewhere. The threaten was a decreasing in the average quality of lambs on the regional market, and the loose of the particularity of this regional market. So, in association with two meat processors and wholesalers, and traditional butchers and some supermarkets, they applied for a “Label Rouge”. This commercial brand belongs to the French ministry of agriculture. It can be used by collective groups only, for a high quality product, specified in a special document, and whose process and organoleptic characteristics are controlled regularly by an independent bureau. This quality product can be produced anywhere, once the official specifications are used. In this case, the higher price is distributed equally between all the partners (farmers, processors and retailers), but the controls are difficult and this constraint makes that some farmers and butchers went out of the scheme, in a period where the price of standard (commodity) lamb remains high.

For “Rosée des Pyrénées” veal, local farmers wanted to promote a very special product : a veal made only with its mother milk and grazed grass. This is not a traditional product, but very characteristic, nowadays, of the eastern part of Pyrenees. The simple commercial brand used at the beginning, was not sufficient for a good definition of the product. The members of the co-operative company decided to have a set of rules for this product, and to make them controlled by a third party. Then they applied for a Protected Geographical Indication (PGI) in order to be allowed to use the word “Pyrenees”. This scheme is quite successful on the regional market, where they obtain high prices. But the retailers outside the region do not reach sufficient margins, and they do not want to sell this product regularly. As for “Taureau de Camargue” beef, it seems it difficult for the “local commodity” to become a “national specialty”.

Conclusion

As it can be seen through these examples, the specificity of Mediterranean meats from ruminant (pale from young animals) can be promoted by different ways, according to the economic, cultural, and agronomic context of each region. However, the consequences of each way of promotion are very different as far as the repartition of the benefits is concerned. Also, as trade of animals, meat, processed products is more and more important among Mediterranean countries, it is unlikely that the different meat companies in the different countries have the same words for the same products. For the preservation or the promotion of typical meat products in the Mediterranean Basin, it is necessary to describe precisely what are the characteristics of each product, in order to make each trading company know exactly what they are buying. An official – or at least standard – certification of the main products and processes would help keeping a segment for these products on the Mediterranean meat market. It is a necessary condition to the preservation of livestock farming in this area.

Table 1. Main traits of specialty meat products of Mediterranean France

	Taureau de Camargue (Beef)	Agneau El Xai (Lamb)	Veau Rosée des Pyrénées (Veal)
Nature of the sign	PDO	Label Rouge	Brand + Official certification PGI applied
Production area	Some districts around the delta of Rhône river	- no	Hills of East Pyrenees (France and Spain)
Starting Year	1996	Brand : 1992 Label Rouge : 2004	Brand 1991 (French part)
Starters	Farmers and one meat processor	Sheep farmers Co- operative	Association of cattle farmers, members of a co-operative
Objectives	Add value to a poor quality product (according current commercial standards)	-Protecting traditional production, specific of this area.	- Distinguish a specific product
Characteristics (Different from standard)	-Dark, strong taste meat, tenderness versatile	-Marketed with head and fry (liver, heart, lung) -Age 60 – 90 days -Pale colour	- Age 5 – 8 months -local breeds -Dark pink colour
Specific process	- Cattle bred and reared for race and games ("course camarguaise" and Spanish "corrida") - Extensive farming in Camargue - Six months fed exclusively with humid natural pastures	- Suckling lamb, complemented with concentrate	- Suckling calve fed exclusively with mother's milk and natural pasture -
Characteristics of farms	Big size	Small and medium, multiple job holdings	Small and medium, multiple job holdings

References

- Boutonnet J.-P., Devautour H., Danflous J.-P., 2005b. Études de cas comparatives des démarches d'appellation en France. Pp. 65-104. In : Produits du terroir méditerranéen : conditions d'émergence, d'efficacité et modes de gouvernance. Ilbert H., (coord.) CIHEAM-IAMM. 298 p. En ligne : <http://femise.iamm.fr>.
- Boutonnet, J.-P., Candau M., Alquier C., Bocquier F., Tchakerian E., Auréjac R., Bourbouze A., Molénat G., Fargeas E., (éds.), 2005a. Productions animales en Méditerranée : viande jeune et claire. Actes du symposium Réseau Méditerranéen Elevage, Montpellier, 18-19/03/2004. Editions Agropolis International. 102 p.
- Boyazoglu, J. et Flamant, J.-C., 1990. Mediterranean Systems of Animal Production. Dans *The world of Pastoralism*, Galaty, J.-G. et Johnson, D.-L. (éds). The Guilford Press, New York, pp. 353-393.
- Chamberlin, E.-H., 1933. The theory of Monopolistic competition, Cambridge : Harvard University Press.
- Rama, D., 2005. The future of dairy products in the Mediterranean market: specialty or commodities? Communication to the International symposium on Comparative Advantages for Typical Animal Products from the Mediterranean Areas, 25th-27th September 2005, Vale de Santarém – Portugal.