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The sheep meat sector: strategies of actors in the steppe region of Tiaret in Algeria

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Abstract: The development of sheep farming has always been a priority for Algeria to meet the population's needs for animal proteins. The objective of this article is to examine beyond the sheep meat producers the functioning of the sector in the region of Tiaret. The morphology and geographical position of the latter give it an agro-pastoral character. Horse dealers (collectors, 22 respondents) and butchers (31 respondents) are considered to be the main players in the sheep meat marketing circuits in the region. They act as mediators between producers and consumers. This study has enabled us to observe that actors in the region are generally better informed about supply, demand and price levels thanks to an efficient information network and a permanent presence in the market. They are characterized by their practices which are particularly aimed at maximizing the margin, followed by transactions which consist in buying when prices are low and selling under advantageous conditions. The times of sale where the prices are higher are the religious periods of Aid El-adha (sacrifice) and Ramadhan.

Keywords. marketing- market- horse dealer-butcher- steppe

Résumé
Le développement de l'élevage ovin a toujours été une priorité pour l'Algérie pour répondre aux besoins de la population en protéines animales. L'objectif de cet article est d'examiner au-delà des producteurs de viande ovine le fonctionnement de la filière dans la région de Tiaret. La morphologie et la position géographique de cette dernière lui confèrent un caractère agro-pastoral. En effet, les marchands de chevaux (collecteurs, 22 répondants) et les bouchers (31 répondants) sont considérés comme les principaux acteurs des circuits de commercialisation de la viande ovine dans la région. Ils jouent le rôle de médiateurs entre les producteurs et les consommateurs. Cette étude nous a permis de constater que les acteurs de la région sont généralement mieux informés sur l'offre, la demande et les niveaux de prix grâce à un réseau d'information efficace et une présence permanente sur le marché. Ils se caractérisent par leurs pratiques visant notamment à maximiser la marge, suivant leurs stratégies qui consistent en la pratique de transactions qui consistent à acheter lorsque les prix sont bas et à vendre à des conditions avantageuses. Les périodes de vente où les prix sont plus élevés sont les périodes religieuses d'Aid El-adha (sacrifice) et de Ramadhan.

Mots-clés. *marketing-marché- maquignon-boucher- steppe.*

I - Introduction

The development of sheep farming has always been a priority for Algeria to meet the needs of the population in animal protein, particularly for the northern regions of the country, which are considered to be major consumers of red meats (Sadoud, 2011). There has been an expansion of the sheep herd, which rose from 21 million to 25 million head between 2010 and 2014, ie a growth of 25%. They are divided mainly between four main local breeds, namely "Ouled Djelleal", "Hamra", "Rumbi" and "D'men". The rest of the production comes from three breeds which are secondary to say the least. These are the "Barbère" and the "Terguia" or "Sidaho", a variant of the sheep breed, bred in the south of the country (Djaout et al., 2017). The meat consumption model encountered in southern Mediterranean countries is based on sheep and poultry meat (FAO, 2014). Generally, meat is consumed where it is produced, this is the case of the region of our study which is Tiaret. This region is considered one of the major sheep meat producing regions, ranking third after the Djelfa and El Baid regions. It accounts for 4.55% of the national herd, i.e. a production of 302,572 quintals of meat (MADRP, 2017). The Algerian steppe, known as an area of nomadism and sheep farming par excellence, is currently changing its face. This change has resulted in the emergence of new production systems tending to the sedentarization of sheep farmers. The sheep population of the Tiaret region is made up of the local “Rumbi” breed (DSA, 2016), considered the heaviest Algerian sheep breed, with weights of around 90 kg for the ram. It is located exclusively in the Tiaret region and represents 11% of the national herd (Moula et al., 2013). The animals have spiral and massive horns, have a strong wear-resistant dentition which allows them to make the best use of the woody vegetation and to delay the cull age to 9 years (Soltani, 2011). It is a particularly rustic and productive breed (Chellig, 1992), generally rectangular in shape, characteristic of meat breeds (Cerquiera et al., 2011; Laoun et al., 2015).   The objective of this article is to contribute to a knowledge of the strategies of the sheep actors (collectors and butchers) in the steppe conditions of the region.

II - Materials and methods

2.1. Presentation of the Tiaret region

The Tiaret region was the chosen site of investigation. It is located at 1150 meters above sea level, its climate is characterized by a harsh winter with frequent snowfall and a hot and dry summer. Its morphology and its geographical position give it an agro-pastoral character (fig. 1).The Tiaret region is a typical region which conceals natural and human characteristics making it possible to be an agricultural pole practicing sheep farming with the particularity of being an economic and agricultural source in the production of red meats of high nutritional quality. It is considered to be one of the major producing regions for sheep meat.
Due to its strategic position is a dominant door and a passage for the ends in the southern expanses which conceals important natural potentialities and in particular 1,609,900 Ha of agricultural land, 142,966 Ha of steppe areas and a forest area of 142,422 Ha. The relief, which is heterogeneous, is materialized by a mounting zone in the North of the high plains in the Center; semi-arid spaces in the South (68.44%).

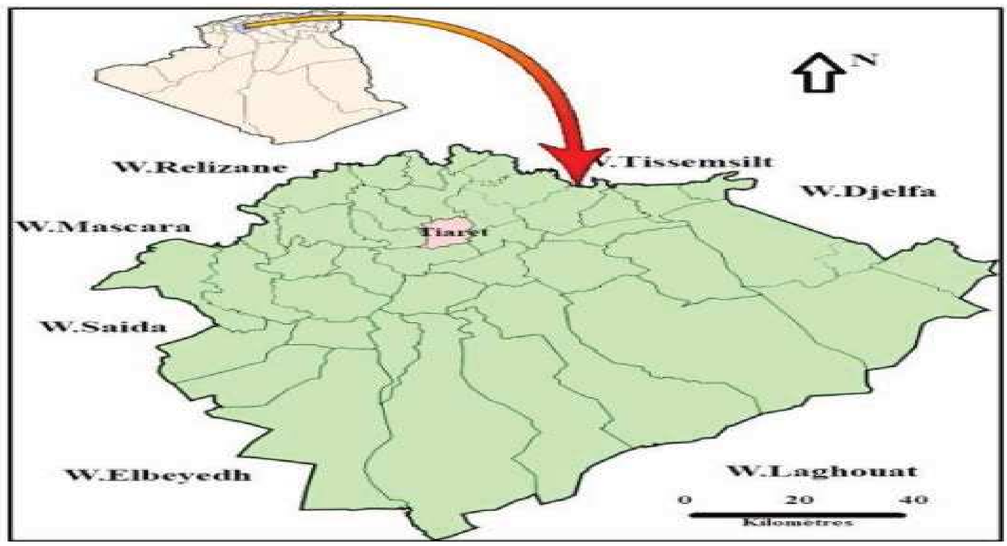

Fig.1. Geographic location map of the Tiaret region (department), Source: Boulenouar, 2016

2.2. Survey methodology

The methodology is based on a survey of 22 collectors spread across the region of Tiaret and operating in two main and most important markets in the region, which are Sougueur and Hamadia, ensuring the supply. butchers from the region and even from other regions Algerian. Their animal purchases, the progress of the purchase operation, their activities per week, their customers, their relationships with actors and funding were detailed in this survey. Thus, a survey was carried out among 31 butchers spread over the Tiaret region. Their sources of meat supply and the constraints encountered, their selection criteria, the place of purchase, the weight of the animal at the time of purchase, financing, the practice of cutting, the expectations of their customers and their relationships with stakeholders were detailed in the framework of this survey. The data collected were subjected to statistical analysis using Excel in order to characterize the horse-trading and butchery activities in the region.

III - Results

3.1. Collectors

There are several dozen of them working in the Tiaret region. According to the law, they must register in the commercial register and are subject to turnover tax, but not all are registered. They act as the link between the market and the butchers. They buy live animals (wholesale) and also sell live animals (retail). Most of them come from the region where they work; they frequent two weekly markets located in the various Sougueur and Hamadia communes of the Tiaret region. We were able to interview 22 horse dealers, which enabled us to better understand their role, their working method and their organization. They are mainly present in the region, where they form an important link in the chain of intermediaries. They source their livestock from these markets, are old and known for their regular supply to butchers slaughterers at the slaughterhouses in the region, as well as other horse-dealers from other regions of Algeria. The transaction between the horse dealer and the butcher is made according to the weight of the carcass and the price of the kilo of meat on the market without taking into account the value of the offal which goes to the butchers. Some horse dealers are only paid after the sale of all the carcasses by the butchers. They all specialize in the sheep business. The dealer is usually the one who is best informed about the supply, the demand expressed by the butchers and the price level thanks to an efficient information network and a permanent presence in the market. He also has significant financial resources, allowing him immediate payment from the breeder and accepting deferred payment from the butcher, which allows him to secure a clientele. 54% of our sample carries out the activity at the level of the Sougueur market, i.e. 12 horse-dealers and the rest practices the activity at the level of the Hamadia market, in addition to other horse-dealers who practice and who are from the regions of Algiers, Sétif, Djelfa, Tissemsilt and Ain d'Ain Defla. 72% of them are married and the rest are single. Thus, 72.70% of them are horse dealers over 42 years old and who are permanent intermediaries practicing sheep activity, while 22.7% are between 35 and 41 years old, of which 4.5 % are occasional intermediaries who do not know this profession of sheep activity. Indeed, the average age of these intermediaries is 45 years. However, 68.20% have their own means of transport which is trucks and vans for transporting animals, while the rest, or 7 horse-dealers do not have. Indeed, 90.90% buy animals from livestock markets and sell locally to the same market to avoid feed and transport costs. The rest, or 9.10%, buy from the farms, given the confidence they have in the farmers to avoid diseases. The majority of respondents, 72.70%, said that price estimation is done by prospecting by touring the entire market. On the other hand 27.30% of them declare that the knowledge of the price is done according to the experience in the trade, because it is the seniority in the trade the exercise of the activity that makes it easy to know the price. . Thus, 68.20% negotiate with the breeder above all the price, according to his financial capacities. While the rest, or 31.80%, mainly negotiate the weight of the animal to control the price of the live and that of the carcass with the aim of maximizing the margin. We found that 63.60% of our sample make purchases and sales on the same day, while 36.40% do not sell the purchased animals on the same day and prefer to transport them to the place of residence and which are generally intended to butchers. Indeed, 54.5% of horse dealers believe that the sales period where the price remains higher is that of Aid El-adha and the month of Ramadhan, where there are strong requests during these religious periods. While 45.5% of them believe that the price increases during the pilgrimage and 13.60% during the marriage periods. Indeed, the category of sheep requested during these last two periods is the ewe. While during the first two periods it is the rams and antenais that are the most in demand.

During the purchase and sale of animals, 63.60% believe that the problems they encounter are due to price fluctuations, which are seen as an obstacle, while for 31.40% it is due to the risk of diseases and what does not control the purchase can lead to poor sales of the sick animal. On the other hand, 4.5% of horse dealers have a risk of death of the animal when buying, which leads to a loss of money (Fig.2).

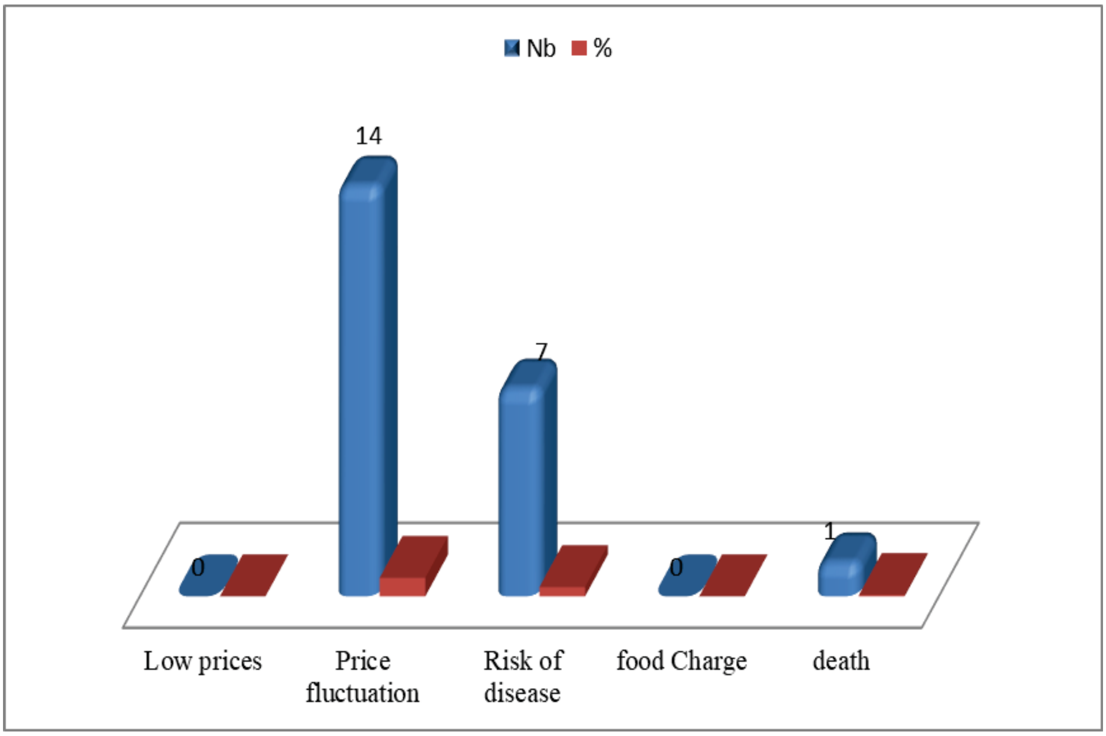

Fig. 2. Problems encountered by horse traders when buying and selling animals

Half of our samples, i.e. 50% declare that the problem encountered in the market lies in the difficulty of evaluating the quality of the sheep, due to the lack of experience of some of them and he asks a veterinarian to not. not be deceived by the seller and this to decide on the purchase or not of the animal. Thus, the difficulty of estimating the live weight of the animal when it comes to sale to the butcher. On the other hand, 4.5% of respondents encounter problems of lack of know-how, respectively, due to lack of experience and the cost of transport which falls to the horse dealer (Fig. 3).

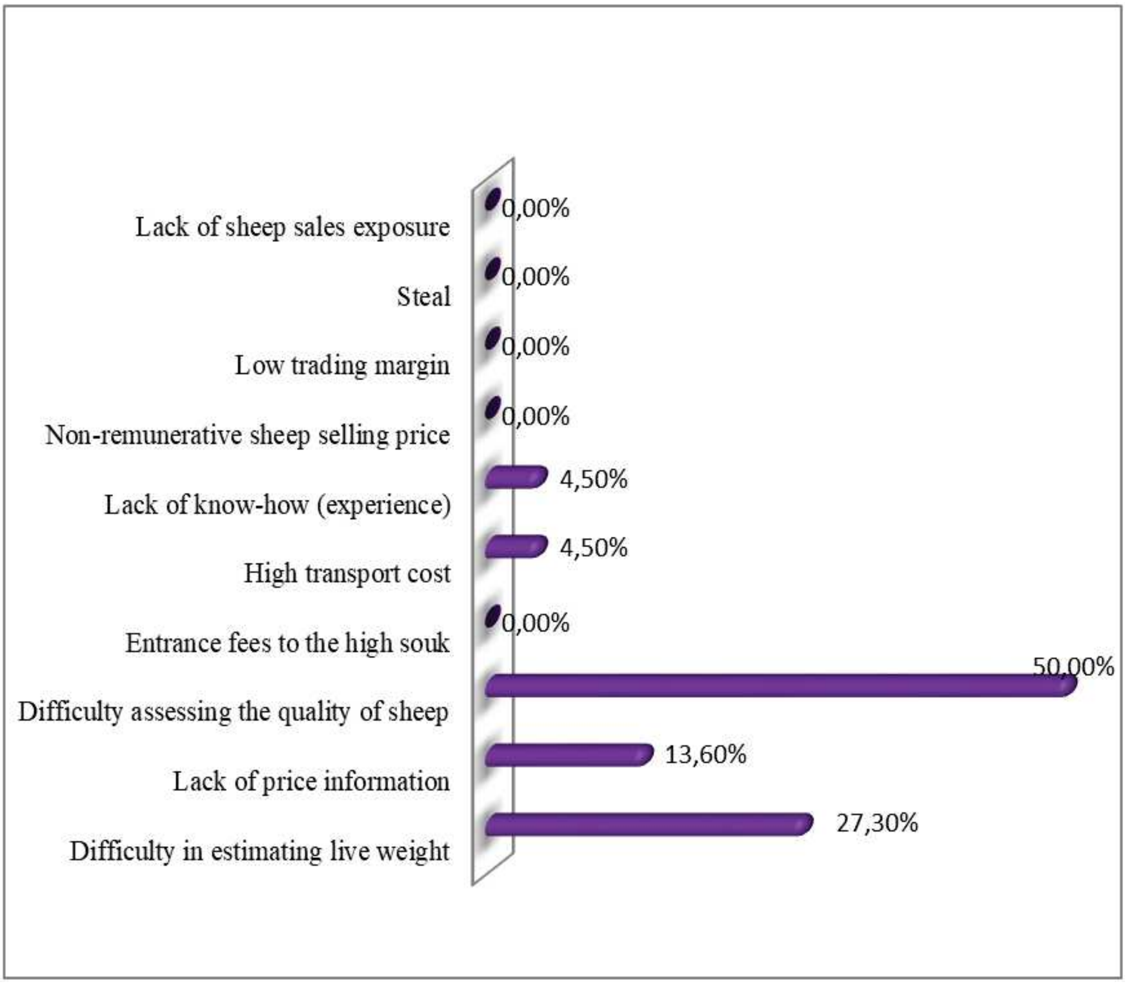

Fig. 3. Problems encountered by horse traders in markets in the Tiaret region

3.2. Butchers

Butchers represent the last link before consumption. We have sought to understand through our surveys how they organize themselves in the region and how their activity is carried out. How do they source their meat and what are their criteria for choosing? What are their customers' expectations and how do they meet them? What relations do they maintain with the actors? Butcher shops (retail stores) are the most developed channel and cover the most space across the country. It is, in fact, a multitude of points of sale or butcher's shops. The majority of them source their supplies from horse dealers according to customer demand, with the exception of a few butchers who said they buy from breeders. These butchers market the meat at retail and control almost the entire meat circuit. It is they who intervene on the last link in the chain of the quick, given the absence of ankles in the region. The butcher therefore simultaneously plays the role of backstop and butcher: he buys the live animal from horse-dealers, slaughters, cuts and sells its meat. The majority of butchers own their own store. The average age of these butchers is 45, varying between a maximum of 55 and a minimum of 38. However, 66.7% of them have a tenure of ten years or more, while the rest are less than five years old. The latter began to learn the trade from their childhood, in contact with their parents. Indeed, 32.6% of them have a primary level, 22.6% no level, 16% respectively have a secondary and university level. While the rest or 4% are graduates. More than half specialize in sheep, while the rest, or 45%, sell other types e.g. beef, poultry and camel. All butchers have shops with a display where lamb carcasses are displayed. Quarters and pieces of meat (shoulders, legs) hang from metal hooks outside the store or above the stall. The carcasses are cut on large logs of wood. We found that for the category of lamb, 45% of butchers buy on average 9 to 17 sheep / month, 26% between 18 and 26 sheep heads, 19.4% from 27 sheep and more and 9.7%, less of 9 heads. Regarding that of antenais, 29% of respondents each buy 10 to 14 heads / month and less than 5 heads / month. Thus, 22.6% buy from 5 to 9 heads and the rest, or 19.4% buy 15 sheep and more. We observed 61.3% get their supplies from the livestock markets from horse-dealers, while the rest, i.e. 38.7%, get their supplies from the breeding sites, directly from the breeders to avoid the problems of diseases and therefore loss of margins.

IV- Discussion

In the markets, the collectors and the butchers confront the breeders. Both, to meet their own objectives, develop strategies according to their financial means, transport and fattening. A balance of power is established between these stakeholders and conditions their gains and / or losses. This balance of power depends on their social status, their power of action in space and time and the financial resources mobilized during the exchange. The collectors determine the volume to be offered for exchange based on forecasts made on the price situation in the markets. For butchers, the purchase of animals is appropriate in the event of low prices (Zoubeidi and Chehat, 2011).
The flows in the market reflect the price of food and the strategies of collectors and butchers that derive from it. The collectors negotiate the selling prices with insistence, due to their dominance and presence in these markets. It is now accepted that it is necessary to upgrade and restore the competitiveness of the players by renewing their technologies, acquiring know-how which poses a management problem for them and introducing management tools. efficient management in order to build significant competitive advantages (Djermoun 2011).
The sheep meat market does not yet see the entry of foreign investment. Indeed, the cost of handling contributes to the low economic profitability.

V - Conclusion

In the Tiaret region as in the rest of Algeria, the dynamics of animal flows were observed from the number of collectors and butchers involved in the marketing of meats, which testifies to the large share of the market held. by these actors. They were characterized by their practices which are particular aimed at maximizing the margin, following their strategies which consisted of the practice of transactions and to buy when prices are low and sell under advantageous conditions. The regularity of transactions and the sustainability of flows were based on exchange networks based on mutual knowledge of the traders and tacit agreements. For the proper functioning of these cattle markets, it is recommended to improve transaction conditions through the development and equipment of markets, such as loading and unloading docks, scales and organization of the movement of animals and operators. The results obtained also testify to the existence of a lack of transparency which operates at the level of the souk and mainly concerns information on prices as well as the weight of animals.n this context, the concentration of capital in these agents does not occur and these artisanal units function normally without growth, nor regular investments. Its nature varies according to multi-year and seasonal production cycles.

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