

Most pressing challenges in livestock sector in France



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Where are you ?

Are you referring to a special region of your country ?



■ **Presentation of IFIP-institut du porc, the French pig and pork research institute**

- Ifip is the **national applied research institute serving the French pork industry**. It was **created in 1961** to support its development.
- Ifip's mission is **to provide public and private actors of the pig industry, knowledge, results, analyzes, innovations** that enable them to face the economic, environmental, social and societal challenges.
- Three main sources of funding: public (71% of which CASDAR 42%, 24% calls for project, 5% genetics), companies (20%), inter-professional organizations (9%)
- Means: **85 full time equivalents, based in Rheu (in Brittany, near Rennes) and Paris**
- **4 teams:** Breeding techniques, Economics and sociology, Meat quality, Genetics

■ **My background**

- I am agronomist, graduated from Agroparistech, specialized in "sciences and techniques of animal productions" and PhD in agronomy (6 years at INRA)
- I then worked for 4 years at Crédit Agricole as agricultural sales manager.
- Since 2013, I work at IFIP as a researcher in economics and sociology.

■ **My research topics**

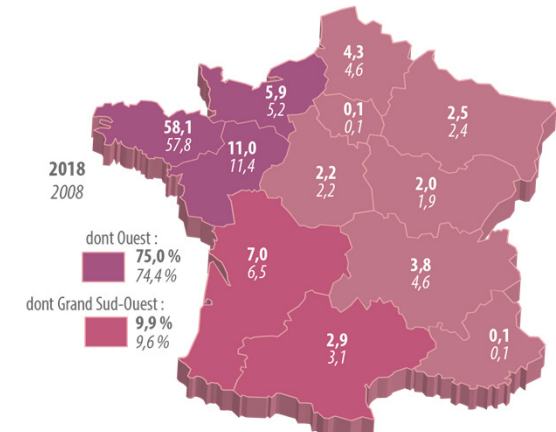
- Social issues (farmers working and living conditions, perception of the livestock farmer profession) and societal issues (social acceptability of livestock farming, answers of the sectors to citizens/consumers expectations such as differentiation of production and market segmentation)
- Structural and spatial dynamics of pig farms in France and worldwide in relation to
- Technical and economic performance, competitiveness

What role plays the agricultural sector in your country ? (1 à 3 phrases)

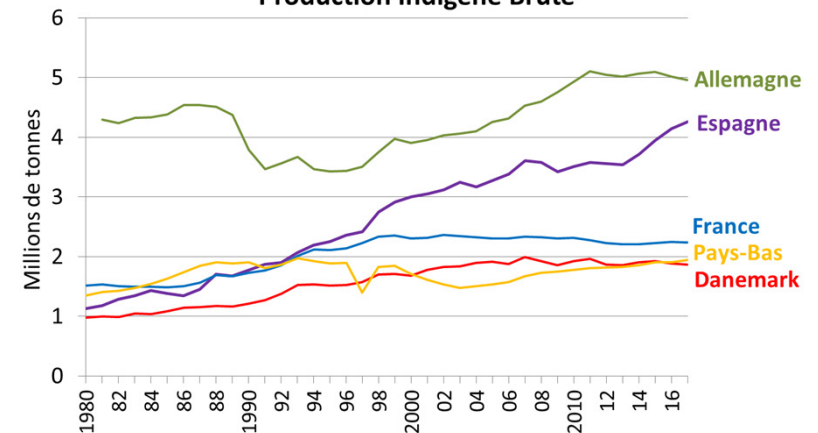


- Pork production accounts for about 5% of French agriculture turnover
- France is the 3rd largest producer of pork behind Germany and Spain
- French pig production increased sharply in the 1980s and 1990s to fill the domestic deficit
- French pig production has been heavily concentrated in the western part of the country (Brittany), benefiting from economies of scale and agglomeration
- This concentration ended up having an impact on the environment (water quality, green algae, odors ...) which led to growing opposition from society and regional regulations.
- Since the early 2000s, pig production has been declining slightly in France.
- **The French sector is today facing four major challenges**
 - **Lack of competitiveness**
 - **Aging buildings and big investment needs**
 - **Transmission (mean age of pig farmers = 50 years) and lack of attractiveness of the profession**
 - **Increasing societal expectations (animal welfare especially)**

Pig production localization



Production Indigène Brute



Characteristics of French pig farms in 2018



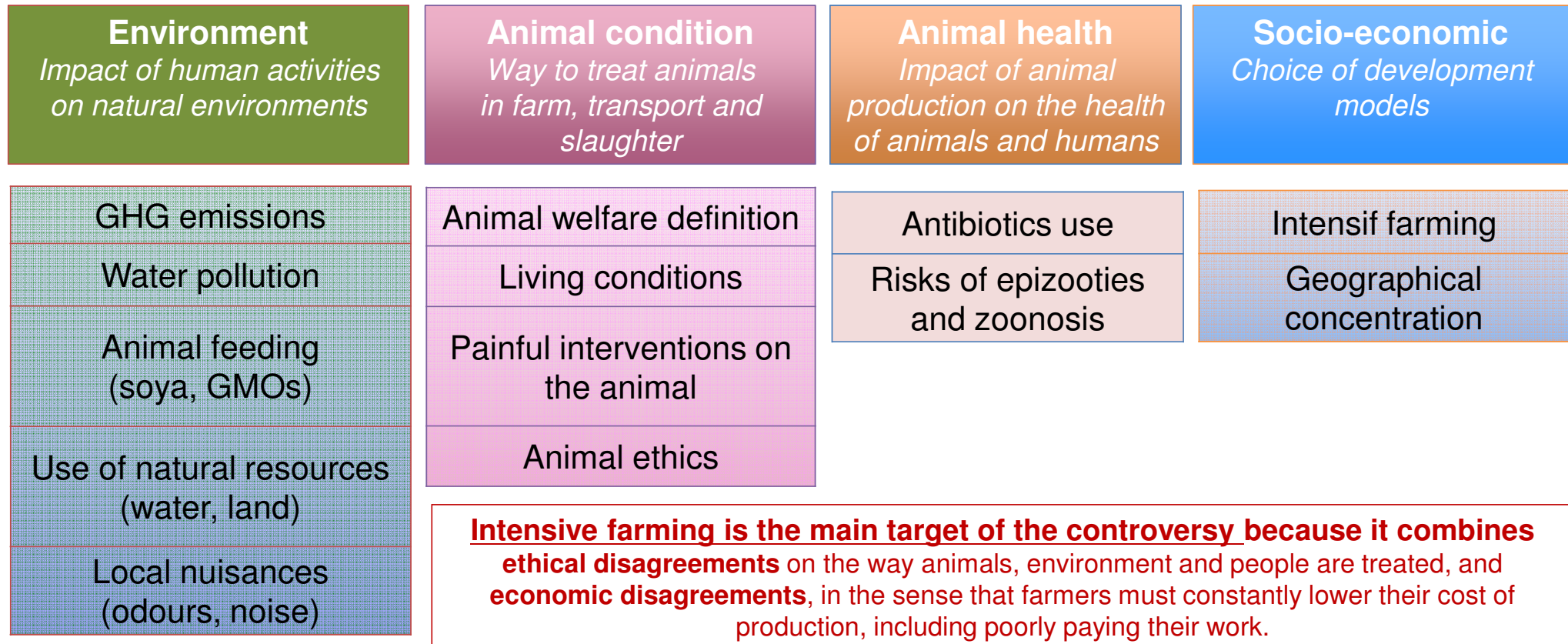
- **About 10,000 pig sites in France producing 99.2% of pig production**
 - 42% of the sites are farrow to finish farms and produce 61% of the slaughtered pigs
 - 7% realize only farrowing
 - 51% are only fatteners and produce 39% of slaughtered pigs

- **A typical pig farm today in France is**
 - 230 sows
 - 65 - 70 ha UAA
 - 23 - 24 pigs produced / sow / year
 - 2.5 UTH (of which 45% is hired labor)
 - 51 years old (farmer)

3. What are the top 5 most pressing challenges that intensif farming is currently facing in France?



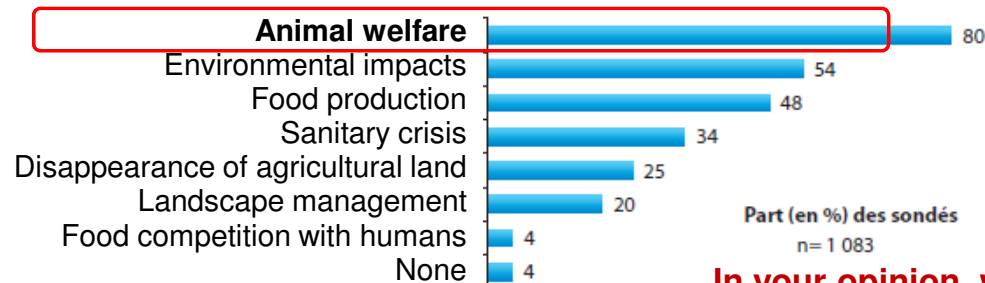
4 main themes of debates / disagreements around livestock in French society today (source : Accept projet)



Animal welfare has become the first concern in recent years in France



What is your main concerns regarding livestock farming ?

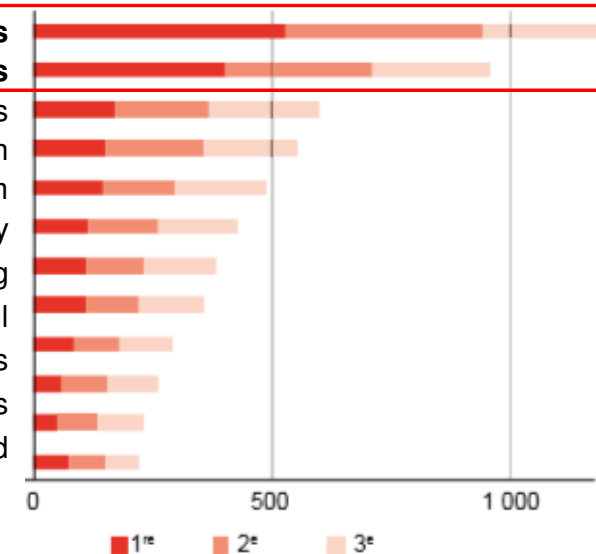


Source : Agrocampus/ifip/Crab
n=1 083 young people in 2014

In your opinion, what are the priority actions for livestock farming in France?

offer all animals raised in France access to the outdoors
strengthen animal welfare regulations

- strengthen health safety regulations
- increase the share of organic production
- limit the number of animals per farm
- increase the share of production under official sign of quality
- Increase the competitiveness of French livestock farming
- offer animal products at prices accessible to all
- strengthen environmental regulations
- Export French animal products
- Is not pronounced

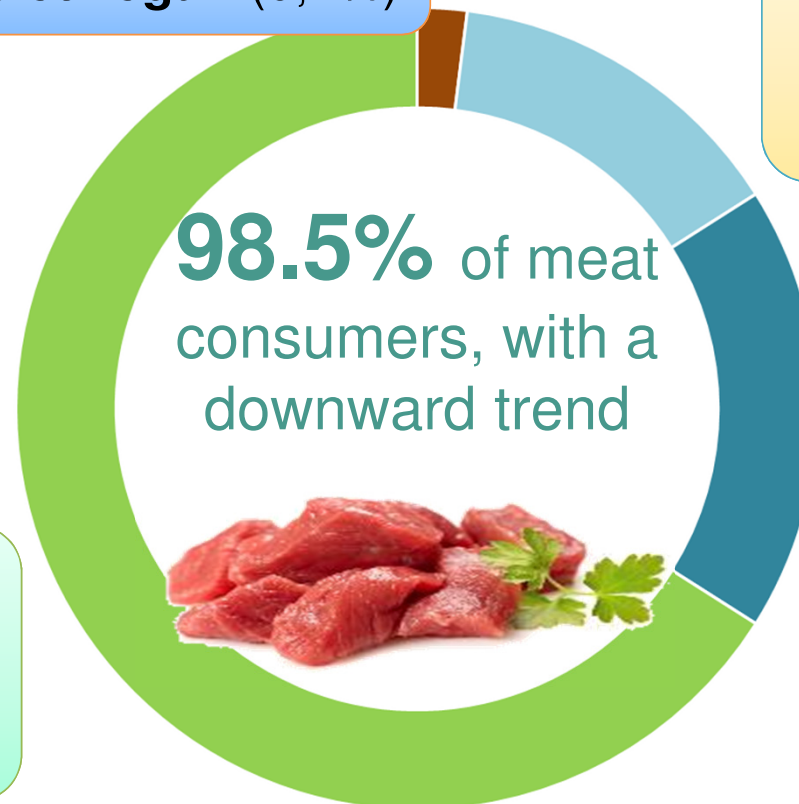


Source : opinion pool in 2016
for ACCEPT projet

Impact on meat consumption

**2% de vegetarians,
vegetalians et vegan (0,1%)**

**14% say they plan to
stop their consumption
of meat**
26% des <25 ans



**18% say they consider
reducing their meat
consumption**

**66% do not think or
reduce or stop their
meat consumption**
73% of men

"Suggested" items

Source : opinion pool for projet ACCEPT, 2,000 citizens, June 2016

3. Why have these challenge to be dealt with ?



- **The debates about livestock farming have become very virulent**, with intrusions into the farms, in addition to the classic videos stolen in farms or slaughterhouses
- **Anger rises in the farming community**
- **Consumption of meat and cold cuts decreases in France**
- The agricultural profession, and in particular the profession of pig farmer, **lacks attractiveness**
- **The generations of farmers are changing**, spouses often work outside, the agricultural world is not outside society
- **So the issues are to**
 - Reconcile livestock farming and citizens, meat and consumers to stem the decline in meat consumption
 - Respond to animal products demand, in its diversity of markets (domestic, export, large export) and of consumers profiles
 - Attract new breeders

4. What three ambitious steps can be realistically achieved by local stakeholders to overcome the most pressing challenge ?



1. To understand and evaluate the situation:

what does the controversy around livestock farming mean? What are the issues for animal production sector?

→ to conduct multi-partner research projects. For example, the aims of ACCEPT project (2014-2018) were to

- identify and analyze the controversies on livestock farming in France and in 5 other EU countries for comparison
- grasp the diversity of society's expectations
- identify the social mechanisms of controversies and collective mobilizations against livestock farming

With the final goal to:

- equip the actors of the sectors, i.e. to let them understand what is at stake in these controversies in order to adapt their postures, arguments, answers
- anticipate the consequences of these debates on farms systems and markets
- feed the reflection on the possible futures and on the livestock farms of tomorrow

2. To better communicate and dialogue with society in order to

■ To reduce uncertainty

- **Listen**: what is said to us and asked
- **Adapt** the register of argumentation
- **Provide evidences**: facts, indicators, scientific publications

■ To restore confidence

- **Transparency** (open farms days) and **social connection** (physical with neighbors and virtual with Twitter, YouTube, Facebook)
- **Commitment** (to evolve) and **guarantees** (NGO partnerships and certifiers)
- **Anticipation** (eg voluntary reduction in the use of antibiotics)

4. What three ambitious steps can be realistically achieved by local stakeholders to overcome the most pressing challenge ?



3. To coconstruct farms of tomorrow, meeting the expectations of farmers (remuneration, working and living conditions) and society's demands (animal welfare and health, environment, less intensive model)

→ addressing the technical, economic and regulatory challenges

- To find alternatives to contested practices (castration, tail docking ...),
- To design and test the farms of tomorrow
- To respond to diverse consumers and markets, for which price remains the prime determinant of choice
- To arbitrate the conflict of objectives between animal welfare and environmental impact

4. To find solutions to support financially the agroecological transition of livestock systems

- To differentiate modes of production
- To segment markets to allow consumers to orient and finance the changes they want
- To finance the evolutions
 - by all taxpayers: redirecting public aid, for example from the second pillar of the CAP to agroecology (for example with measure 14 for animal welfare of EAFRD)
 - by consumers: taxes (VAT increase), market segmentation with labels
 - by financial instruments (loan funds, guarantee funds, private equity funds) to leverage conventional bank financing
 - by long-term contracts on volumes and prices between producers, processors and distributors

5. What does « transformation » mean for you in regard to areas of intensive farming?



- **For me, sensitive to developments in the North of the EU: to further differentiate modes of production and segment the market in four levels**
 - **Regulatory standard:** for price-conscious consumers
 - **Improved standard** (a little more space, a little straw, windows, less painful practices): for consumers "progressive" on the ethical arguments (animal welfare, environmental impacts, health...)
 - **Access to open air** (open-front or courtyard buildings): for "alternative" consumers (they buy less but better)
 - **Organic:** for "alternative" consumers

- **For the French swine interprofession Inaporc, in its sector plan written at the request of the President of the Republic within the framework of the 2017 Food Summit Conference: Strategy "POrc Respect Confiance" to "propose a new segmentation of the pork market"**
 - 1st level (98% of pigs): complete the specifications of "Le porc français" (antibiotic panel, animal welfare indicators ...) + third-party controls
 - 2nd level (15%): new segmentation with collective charter, serving as a basis for private segmentation
 - 3rd level (20%): develop the sectors under SIQO (quality and origin certification) (organic: 5 to 10%, Label Rouge: 8 to 12%)

6. What are the risks of current/future transformation processes for your country ?



The risk of current/future transformation processes in France are:

Farmers invest in alternative farming systems (open-front buildings, free sows in maternity ...) but

- **Real consumer demand for products from these less intensive farming systems** is not up to their intentions and statements.
- **Consumers' willingness to pay for these differentiated products** on the mode of production is insufficient. Incremental production costs are not offset by the market putting producers in an unsustainable economic situation.
- **The pressure of NGOs and politics leads to regulatory changes** that undermine the possibility of obtaining gains on these products.
- **French pig farmers are discouraged**, pig production declines. This spiral causes difficulties throughout the sector (food manufacturer, slaughterers, processors). Imports of foreign products rise sharply.

7. What are the opportunities of current/future transformation processes for your country ?



The opportunities of current/future transformation processes in France are:

- **To reconcile citizens with livestock farming, consumers with meat**
→ to stop the decline in pork consumption
- **To protect the internal market** by better meeting the demand of French consumers
- **To anticipate possible regulatory changes**, for example towards free farrowing or mandatory meat labeling according to the mode of production
- **To reinforcing the image of the pig farmer's profession**, by a mode of production more in line with the demands of society (less criticized) and thus attract candidates for the setting up or the wage-earning

8. What might be your role in a new consortium?



Please write on sentence

- Given the skills and expertise of its engineers and scientists in breeding techniques, animal welfare and health, environmental impact assessment, economy and sociology, the role of IFIP-institut du porc in a new consortium might be
 - **To adress the demands** of citizens and consumers toward animal production systems
 - **To participate in the construction of livestock farming systems of tomorrow and their assessment** on animal welfare and health, environmental impact, on economic performance (costs of production, product valuation, contractualization, market price, remuneration of producers, profitability), social performance (working and living conditions of breeders, attractiveness of the breeder profession) and societal performance (recognition and acceptance by society of the breeding models for tomorrow)

9. What is your expectation from the workshop?



- To **better understand the concerns of other EU Member States** regarding the evolution of livestock systems
- To **identify organizations and individuals** with whom to build partnerships and joint research projects
- To share the skills, experiences and resources of our research institute