

Structural changes in farming and labour needs : new farm workers for new forms of production organisation

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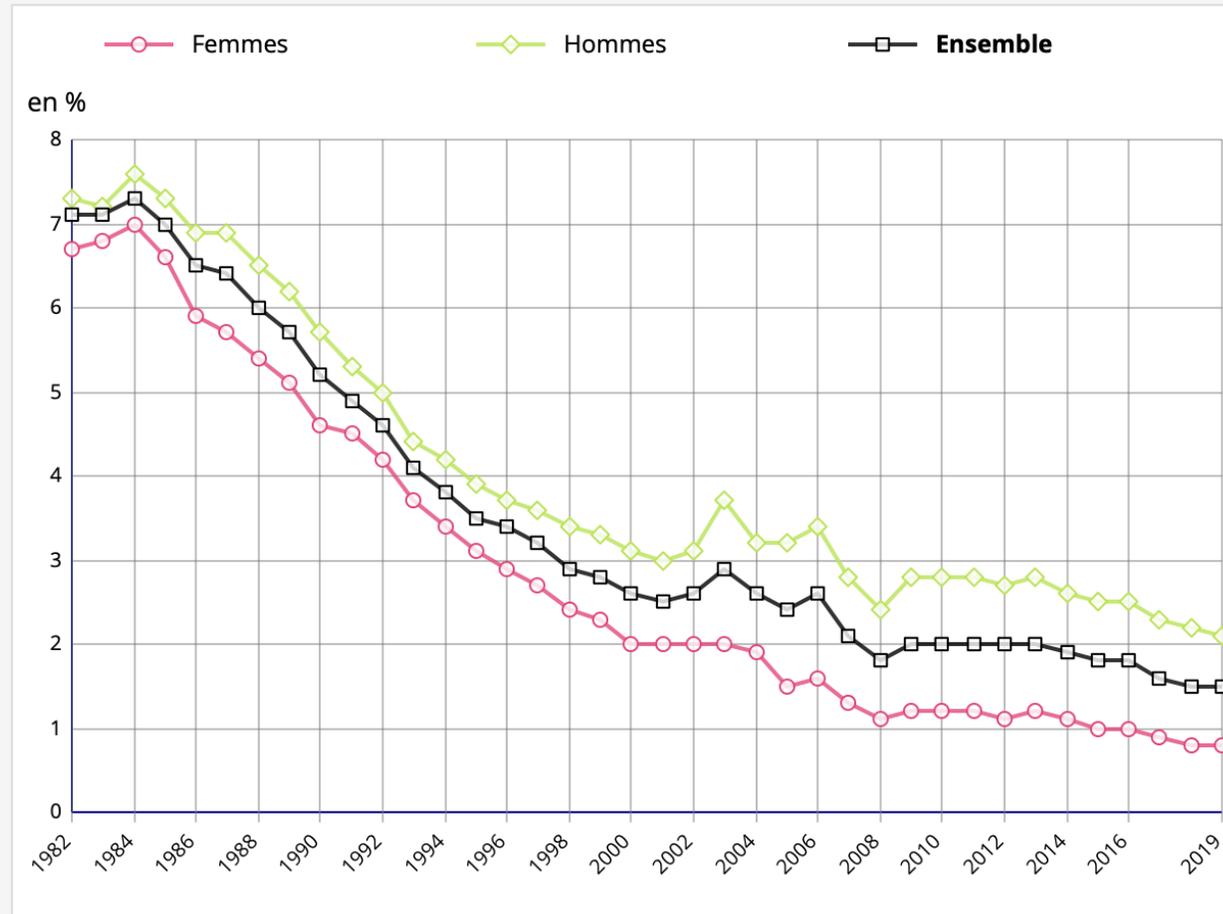
The disappearance of farmers
and the fragmentation of forms of production organisation

French statistics: what they say...

2020 : **398 794 farmers** (Source : MSA)

or **1.5%** of total employment (Source : INSEE 2020)

The demographic challenge



Lecture : en 2019, 2,1 % des hommes en emploi sont agriculteurs exploitants.

Champ : France hors Mayotte, population des ménages, personnes en emploi.

Source : Insee, enquêtes Emploi, séries longues sur le marché du travail.



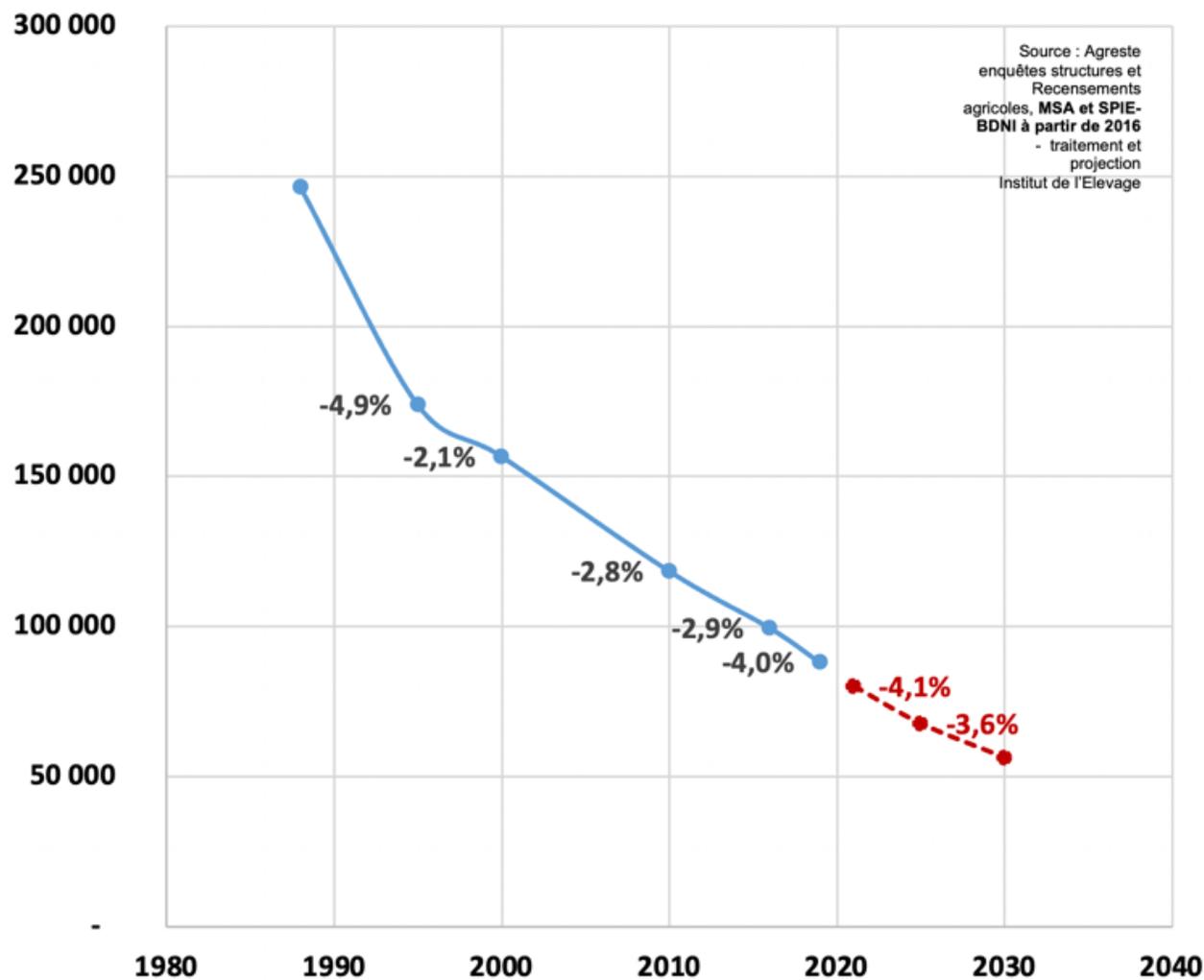
Between 2000 and 2016

**-58,890 dairy farms
i.e. half of all farms in the sector**

**'Nearly a quarter of dairy farmers
plan to stop
production within five years'.**

(CNIEL 2020 survey, Réussir 22 February 2021)

**Number of farmers
in dairy farms
and rate of disappearance (%/year)**



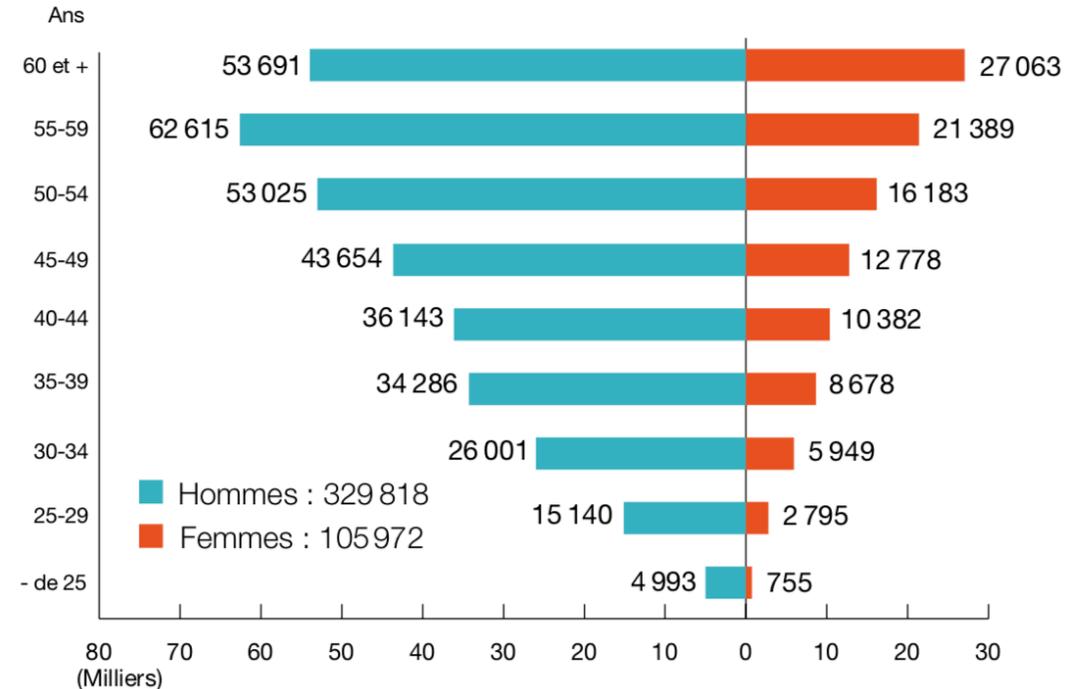
**25 %
of farmers
are 60 or over**

(Source: Ministry of Agriculture, 2021)

**By 2026
50% of farmers
will be of retirement age**

**Between 2022 and 2030 :
196,186 french farmers
are likely to retire**

Distribution of farmers
by age group (total of 435 790 in 2020)



(Source: CCMSA, Direction des Statistiques des Etudes et des Fonds, August 2022)

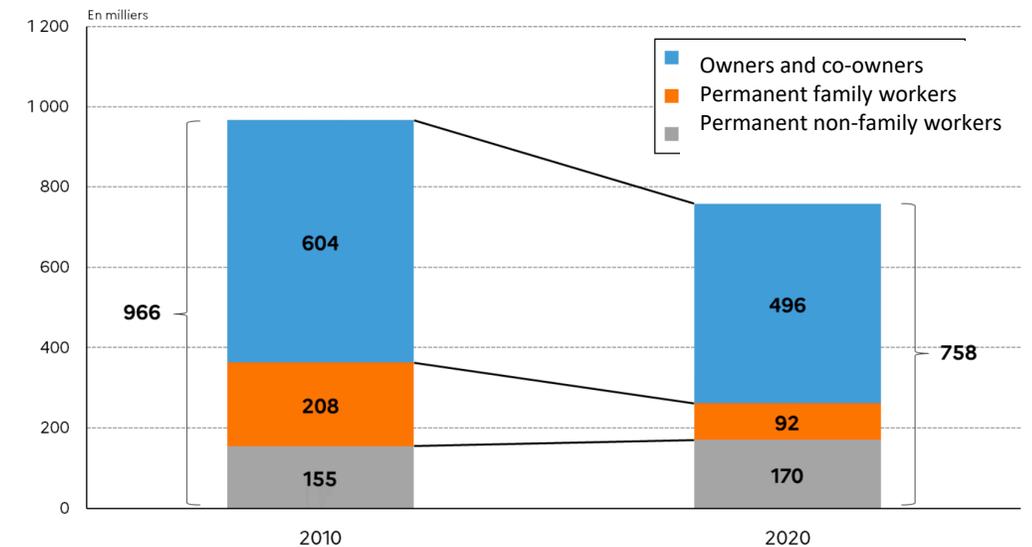
Still a family business but less and less based on family labour

between 2010 and 2020
- 55% permanent family workers

A majority of men.
only 19% of them
have a farming spouse

The end of couple farming.

Decline in permanent workforce
between 2010 and 2020
Number of permanent farm workers



Champ : France métropolitaine.
Source : Agreste - Recensements agricoles 2010 et 2020.

Main d'œuvre agricole, présentation des résultats du recensement agricole 2020, 7 décembre 2022

Fewer family workers, more employees



2003-2016 :

- + 71% more employees working for outsourcing companies
- + 249% increase in the number of employees working for 'groups of employers'

933,000 salaried farm workers

working on French farms, hired either directly by the farmers or through employment agencies

185,700 work on the farm but are employed by diverse organisations (temporary work companies, employers' groups and Cooperatives for the Use of Agricultural Equipment (Coopératives d'Utilisation de Matériels Agricoles), and foreign service providers (posted workers)). (Magnan, 2023)

The issue of farm transfer

20,000 retirements for 13,000 new entrants (of which only 4,800 are subsidised)



**Early retirements (9400/year)
in particular to salaried workers (4120/year)**

The family: the main obstacle to family farming?

Farmer couple but often a single farmer

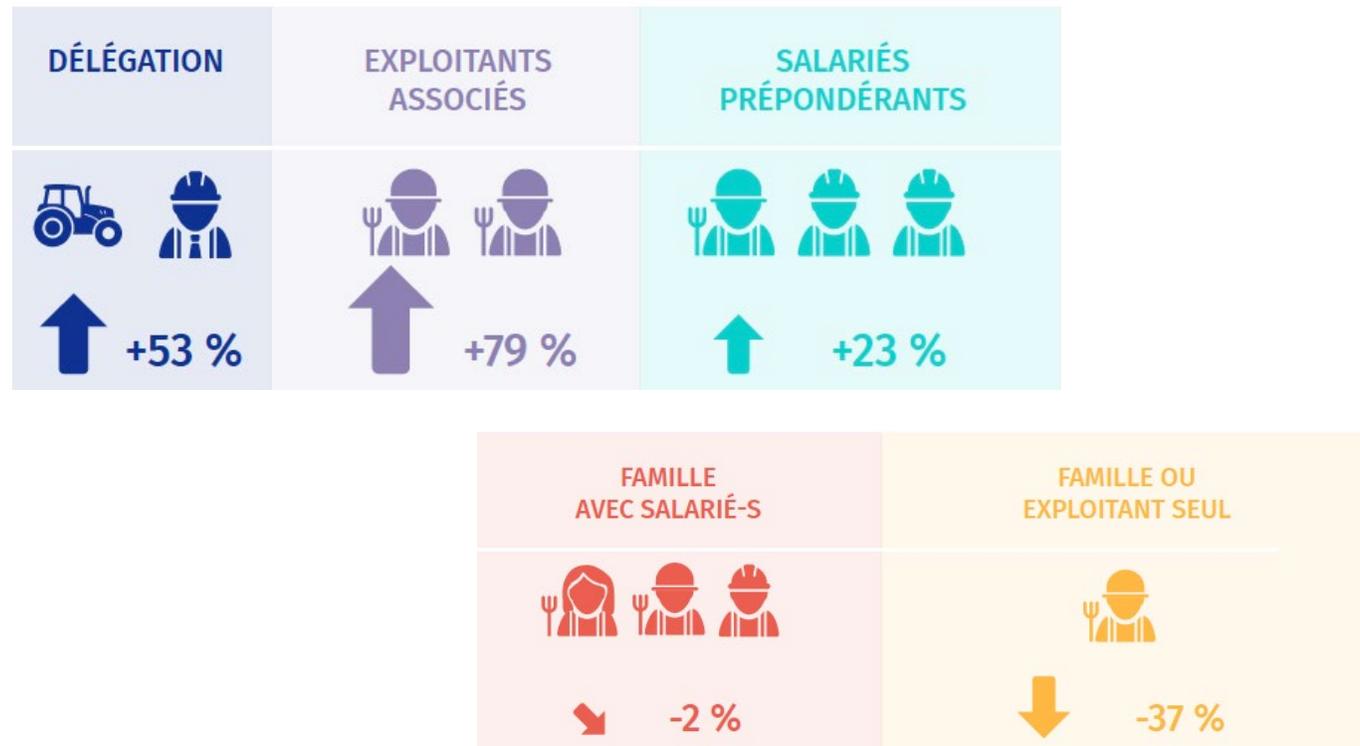
From mobilising the family to serve the farm ...
... to mobilising the farm to serve the family

Farming, an entrepreneurial project or an asset management project?

- a process of abstraction of farm capital
- new strategic advisory networks

Parents who no longer do favours for those who want to take over the farm.

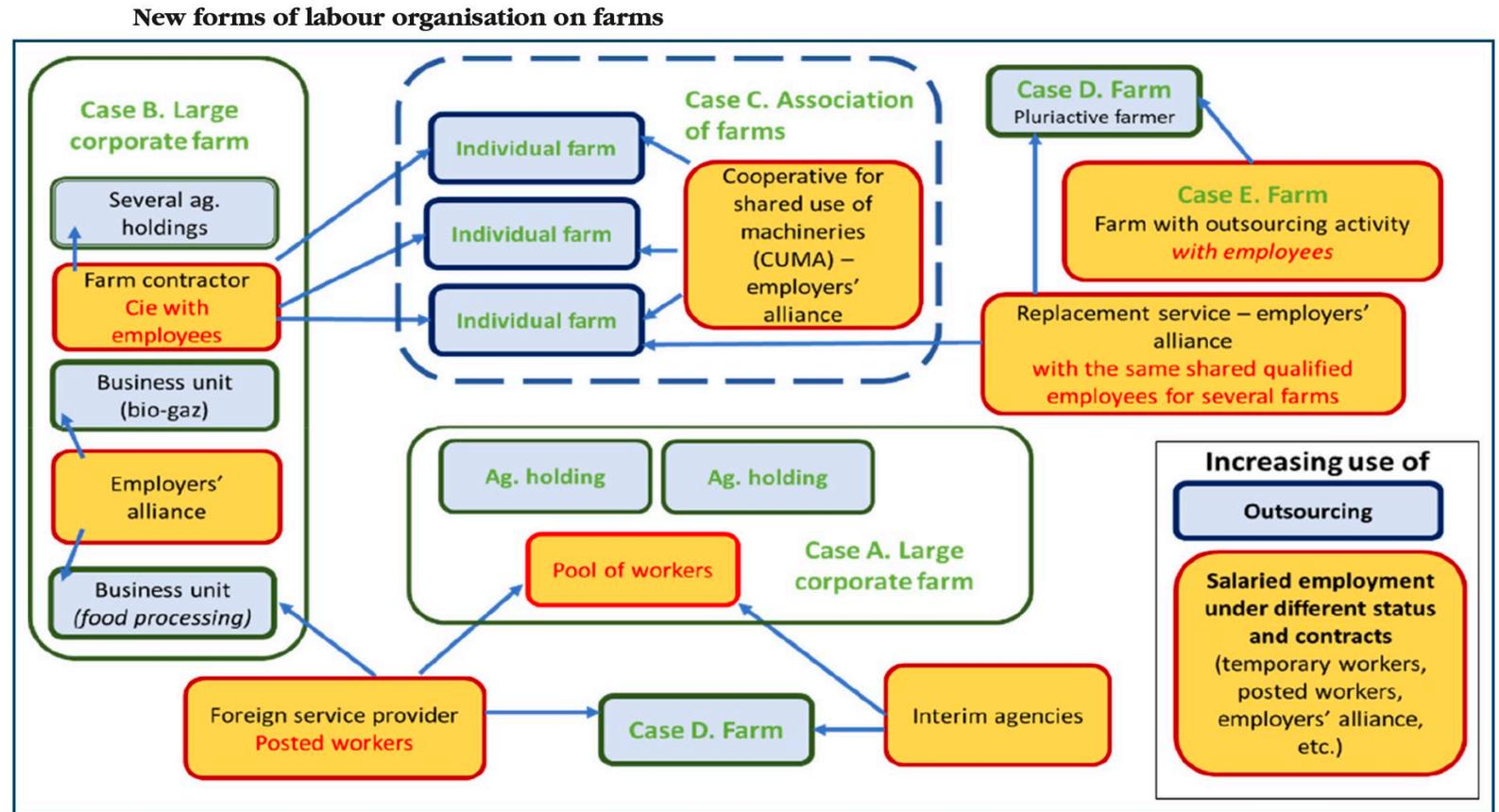
5 types of labour organisation on French farms and changes from 2000 to 2016



Source: données du recensement agricole 2000 et de l'ESEA 2016, traitement INP-ENSAT et CEP.
 Lecture: la largeur des colonnes reflète (de façon non proportionnelle) l'importance en poids économique (production) des types de mobilisation de la main-d'œuvre, croissant de gauche à droite. La taille des flèches est proportionnelle à l'ampleur de l'augmentation (en bleu) ou de la diminution (en rouge) des types observés. Les données sur la production portent sur la production brute standard (PBS).

Statistics: what they don't say...

- Complexity and blind spots
- Farm workers who move from one agricultural company to another.
- The official position in a company says nothing about the actual work done



Source: Authors, based on semi-structured surveys of farms.

in Laurent, Nguyen, 2022, Innovation in Labour Organisation and Social Conditionality: Implications for Farm Advisory Services, Eurochoices.

The boundaries of a production unit no longer always correspond to those of the single farm identified in the statistical system.



2 Between 'doing things together' and 'getting things done by other'

Agricultural production: a service activity like any other

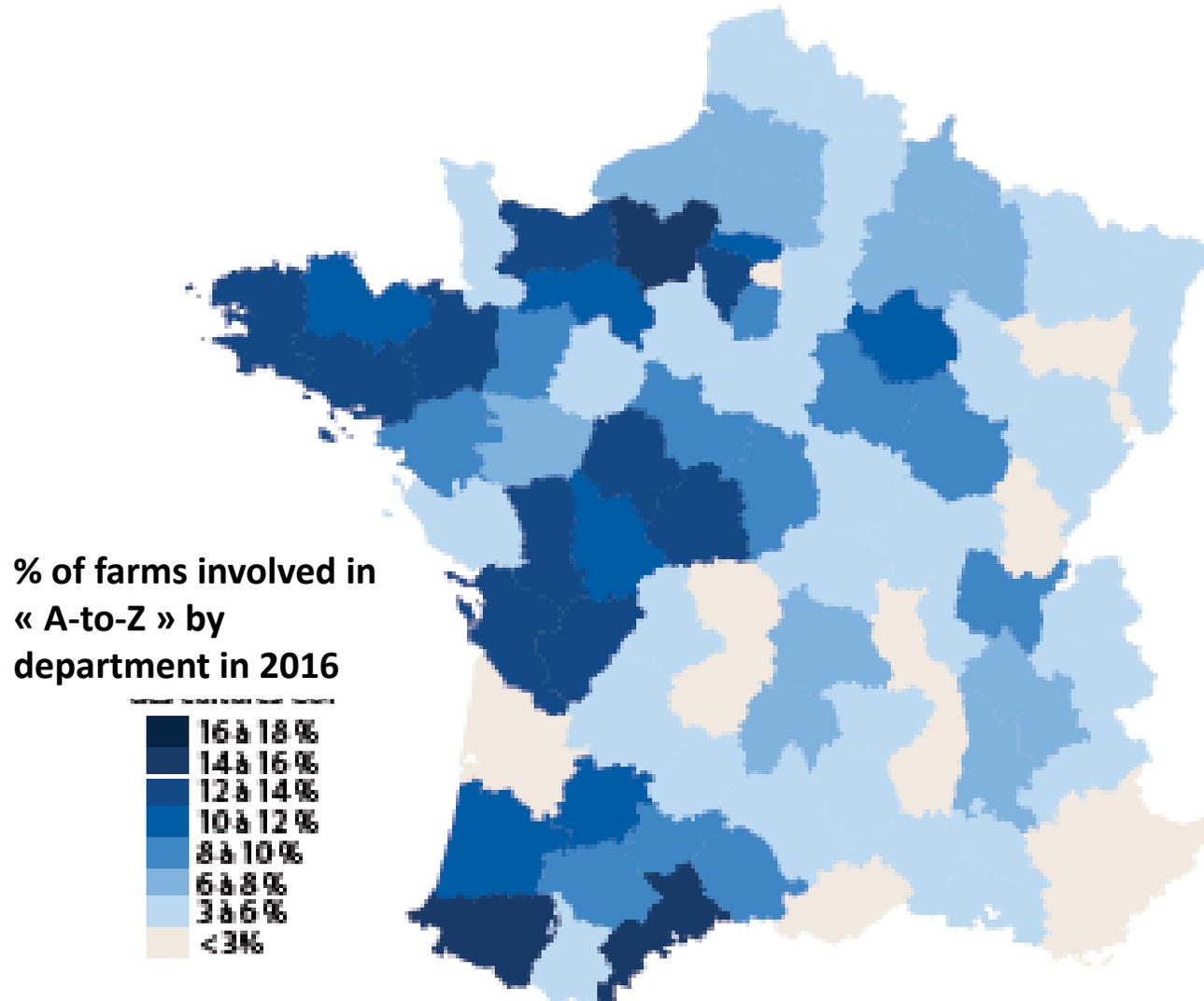
- Tertiarisation of agricultural production activities
- New arrangements for 'co-piloting' farms
- From refocusing on the core business to full outsourcing



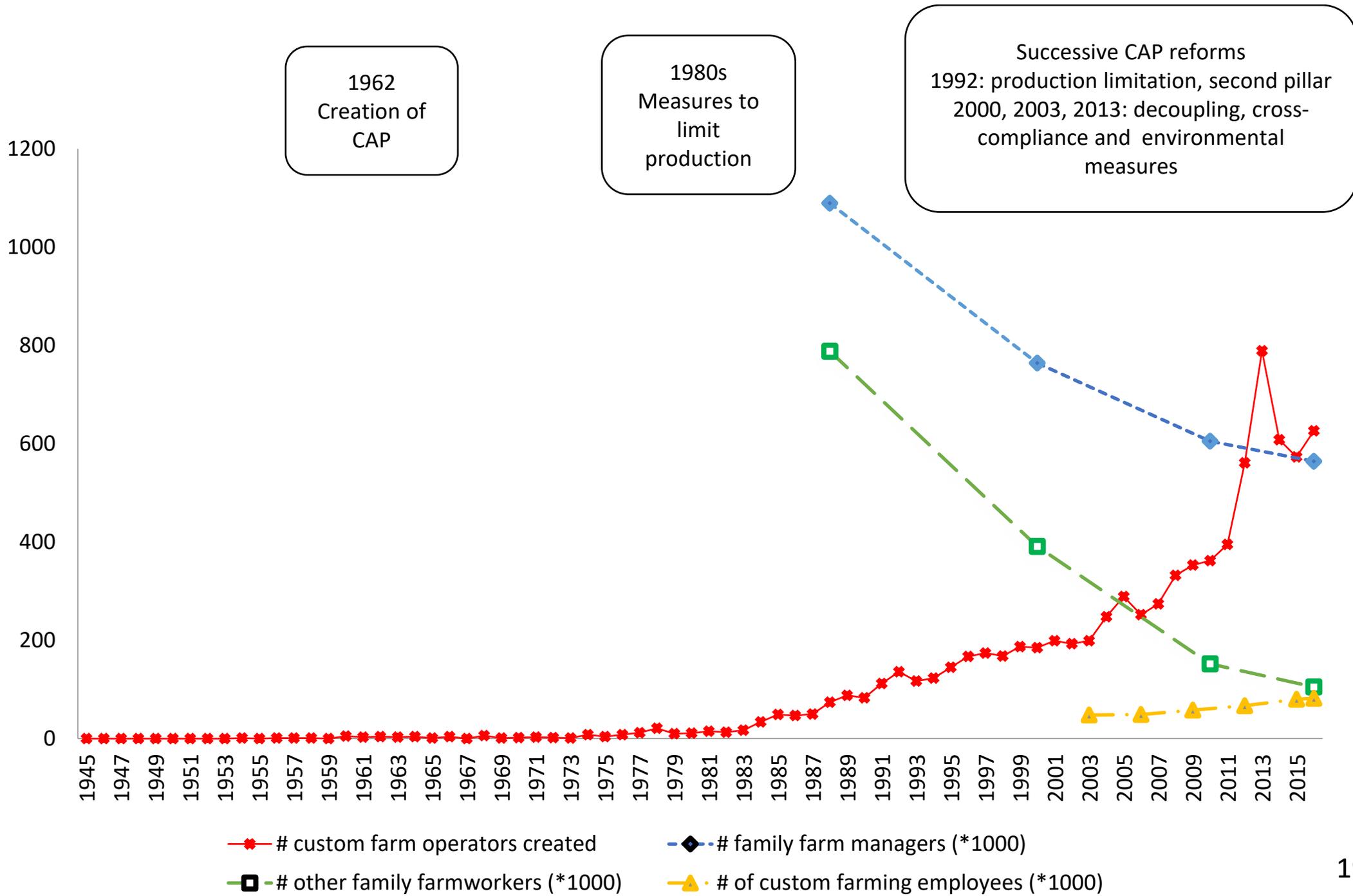
Crédit photo : Réussir Grandes cultures

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Utilisation et diffusion soumises à conditions

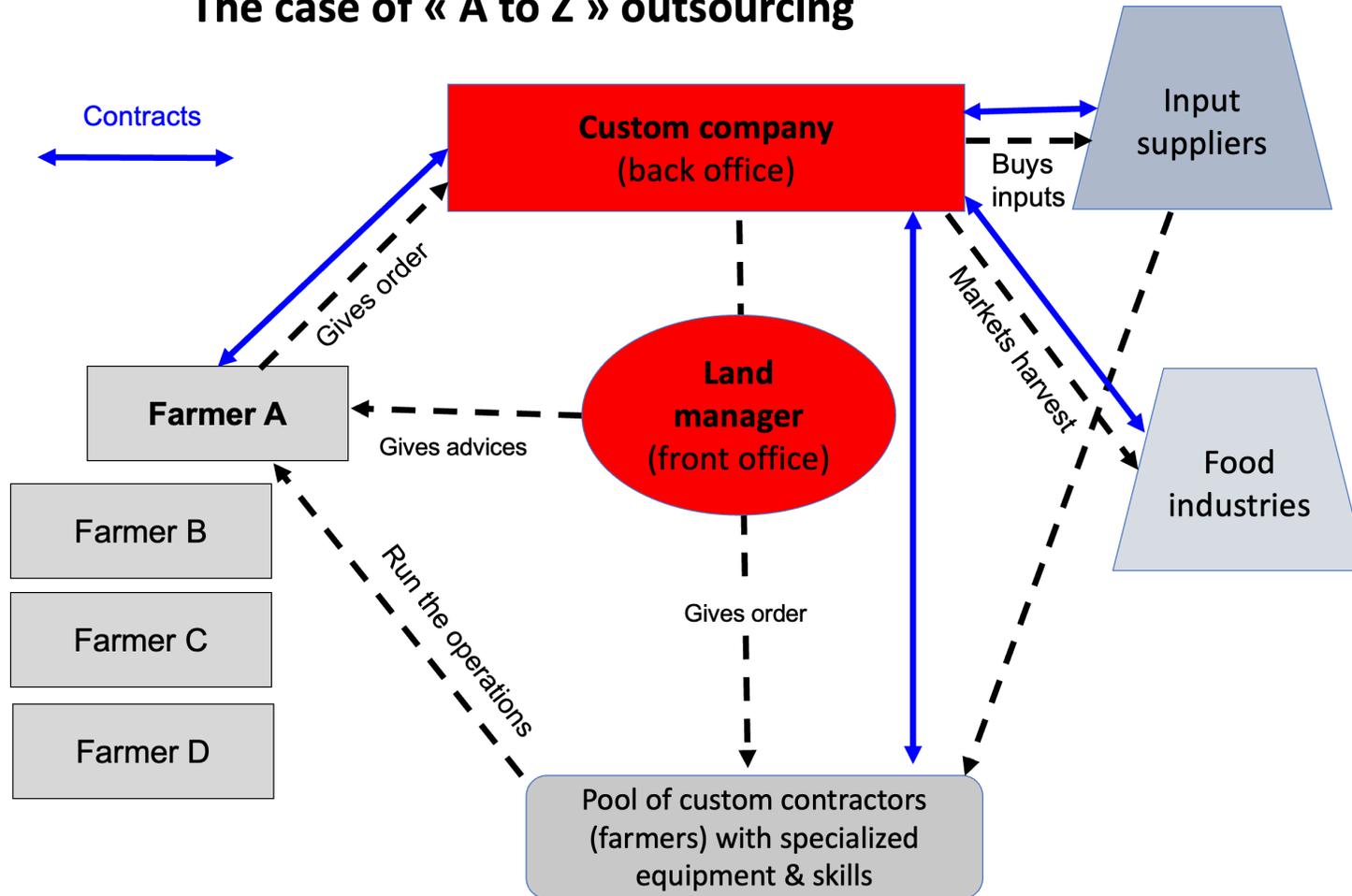
“A-to-Z” custom farming: an important yet forgotten phenomenon



- 7 % of total French farms = 26.500 farms; 500.000 hectares; 5,5% agricultural gross income
- Mainly medium to large farms
- Mostly in grain-producing and regions :
 - 12,5% of grain farms
 - 14,5% of cattle farms
 - 6% of mixed grain/cattle farms



The case of « A to Z » outsourcing



New ways of orchestrating agricultural production that are invisible to the statistical system.

New categories of employees working in these agricultural consortiums.



3

Questions asked
and possible developments

And what about tomorrow's farms?

- Atypical forms of business set to emerge
 - New forms of employment.
- Sectors and organisations that need to mobilise to support them



- **These changes will be made in response to two challenges**

- internal' challenges (workforce management, transfer/new entrants)

- external challenges (markets and public policies)

- Facing up to growing uncertainties: market, price, climate shocks, etc.

- New decision-making horizons: projects limited to shorter/flexible professional timescales (more frequent entries and exits)

- **Companies whose objectives will be based on :**

- **Reorganising work and optimising resources**

- **Value creation/redistribution through multi-specialisation**

- **New forms of business integration (generation-skipping, partners or employees as new entrants, etc.)...**

Three major strategies for organising labour, which are not mutually exclusive:

- **Association ‘new collectives’ ‘new partnerships with shared governance’**
- **Integration: hierarchical governance with integration of new professions and new functions within the farm (salaried employment)**
- **Outsourcing: delegated governance, +/- dissociation K/W**

Sometimes even within the same farm