



French Pork Interbranch

Anne RICHARD
Managing Director



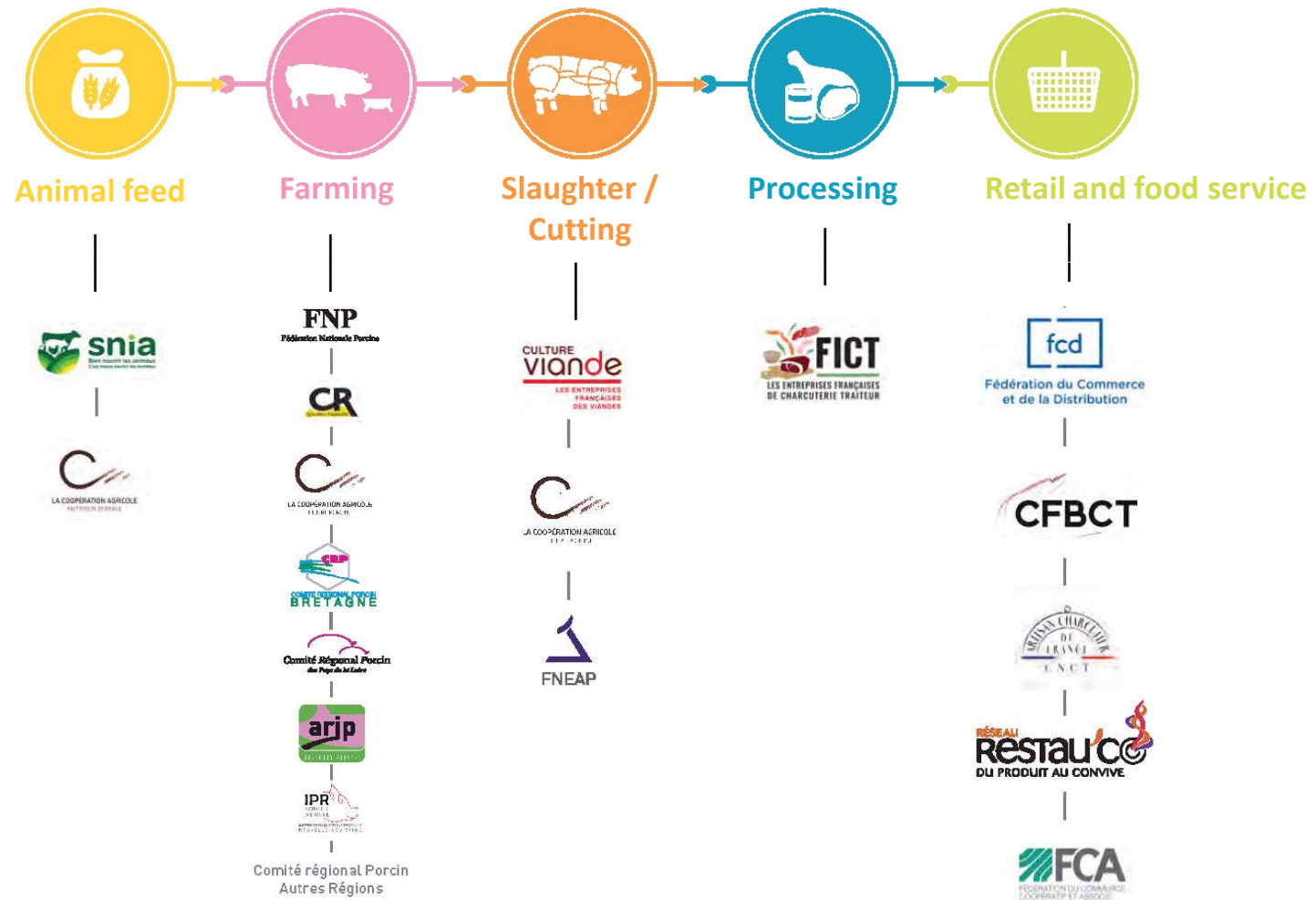
Agenda

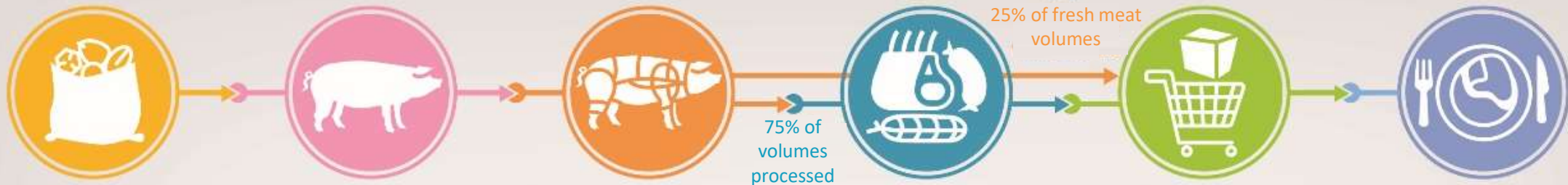
- The french interbranch : INAPORC
- Key figures of the french production
- Thoughts for a resilient porcine production

INAPORC

Professionals in the pork industry

19 federations organized in 5 colleges





Animal feed

201 companies

310

feed
manufacturing
plants

5

million tons of food
produced/year

Farming

10,000 pig farmers

14,000

breeding sites

34

producer groups
(cooperatives)
representing 90% of
the production

23

million butchered
pigs produced /
year

Slaughter / Cutting

165
slaughterhouses

212

cutting plants

2.3

million tons of
meat equivalent
carcasses/year

Cured meats

310
companies

1.3

million tons of
charcuterie products
produced/year

Retail and food service

11,600
Retail stores

5 200

Drive

17,000
artisanal
butcher's shops

4,500

artisanal
delicatessens

Consumers

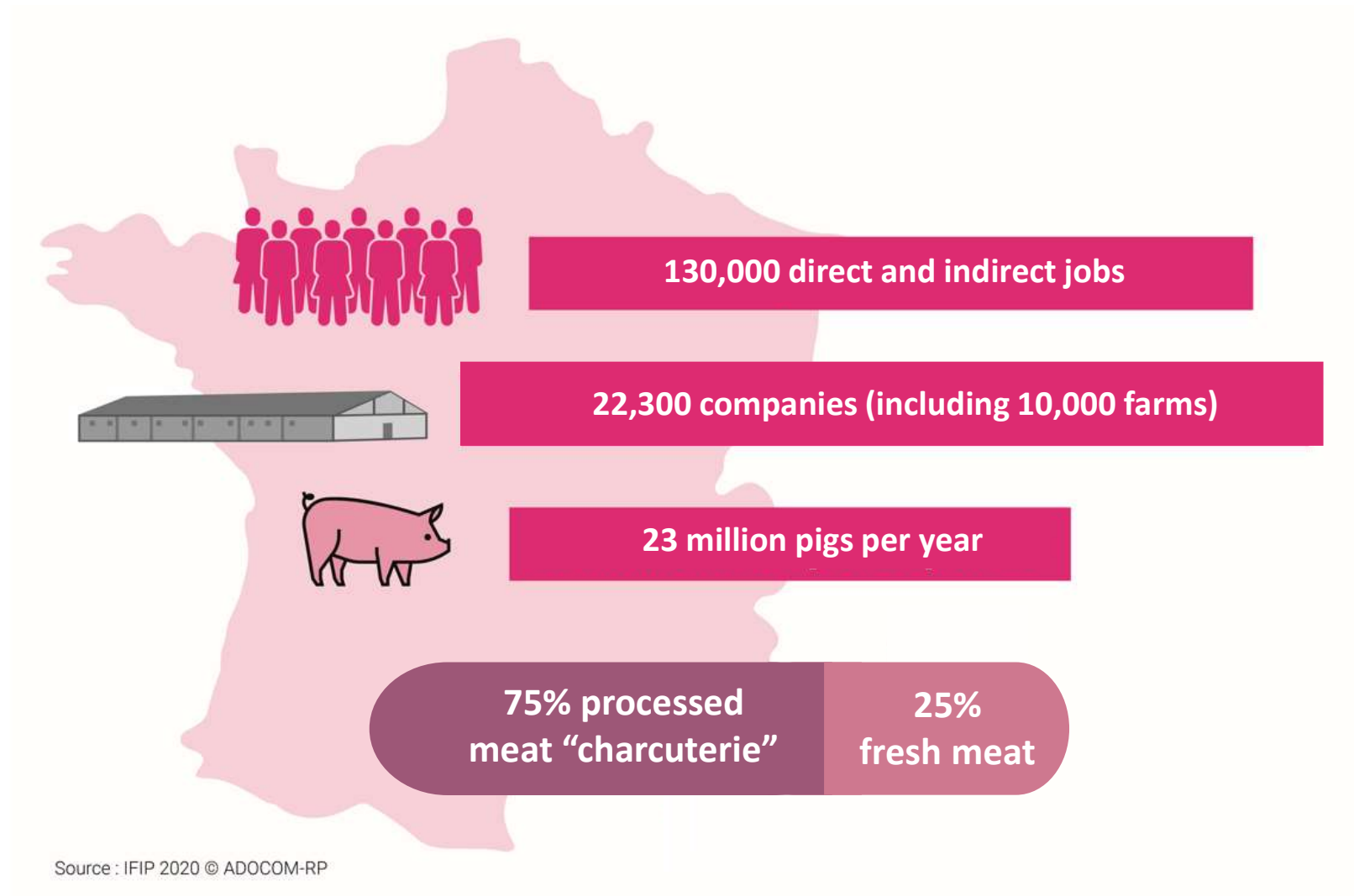
2
million tons of
meat equivalent
carcasses/year

31.6 kg pork
meat
/ inhabitant
/ year

Agenda

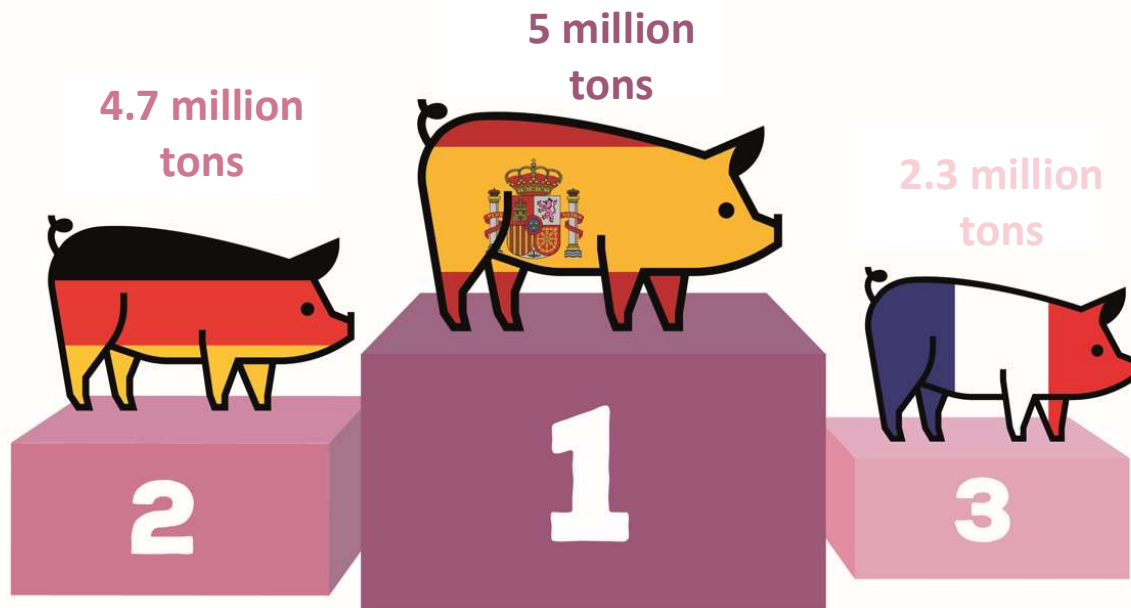
- The french interbranch : INAPORC
- **Key figures of the french production**
- Thoughts for a resilient porcine production

The pork industry in France



France: ranking #3rd for pork production in Europe

Pork production in Europe

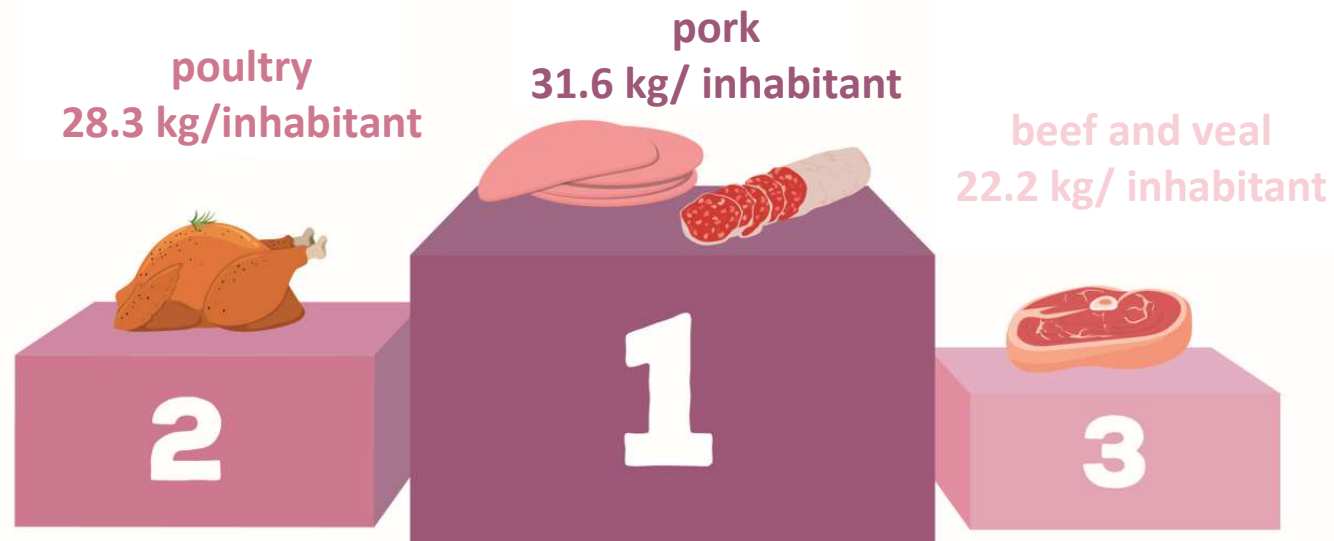


Source : IFIP 2020 © ADOCOM-RP

- **23.3 million porks** reared in France in 2020
- **2.3 million tons** carcass equivalent (tce).
- **France = 9 % of European pork production**
- Spain : 21 % ; Germany : 20 %.

Pork: Favorite meat in France

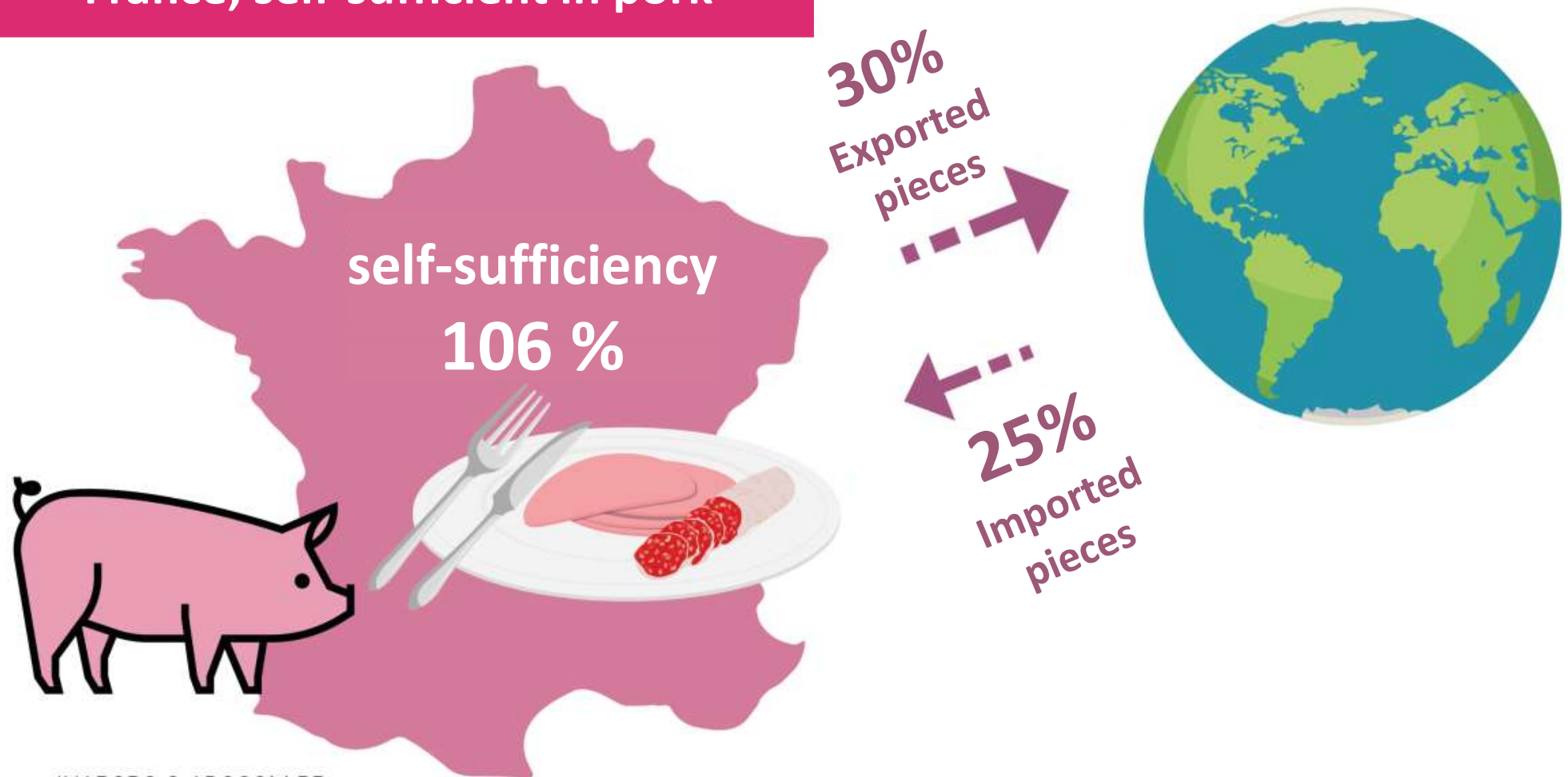
Pork: 1st meat consumed in France



Source : estimation IFIP, SSP, Itavi, Institut de l'élevage 2020 © ADOCOM-RP

Food Sovereignty

France, self-sufficient in pork



Source : INAPORC © ADOCOM-RP

Agenda

- The french interbranch : INAPORC
- Key figures of the french production
- **Thoughts for a resilient porcine production**



Family farming: capital and labour

Only 41% specialized in pig production

- ~ **10,000 farms**: 99% of pig herd,
 - **4,900 farms with 200 sows** on average
- **Specialized but also mixed farms:**
 - 41% of pig farms are specialized in pig production, more than 60% of the production
 - 40% associate pigs and cows
 - 19% combine pigs and polyculture (census of 2010)
- **Family farming**
 - ✓ Capital
 - ✓ Labour



The typical pig farm in Brittany: specialized, farrow-to-finish
with 250 sows, 75 ha UAA, 2.80 full-time equivalent (50% hired)

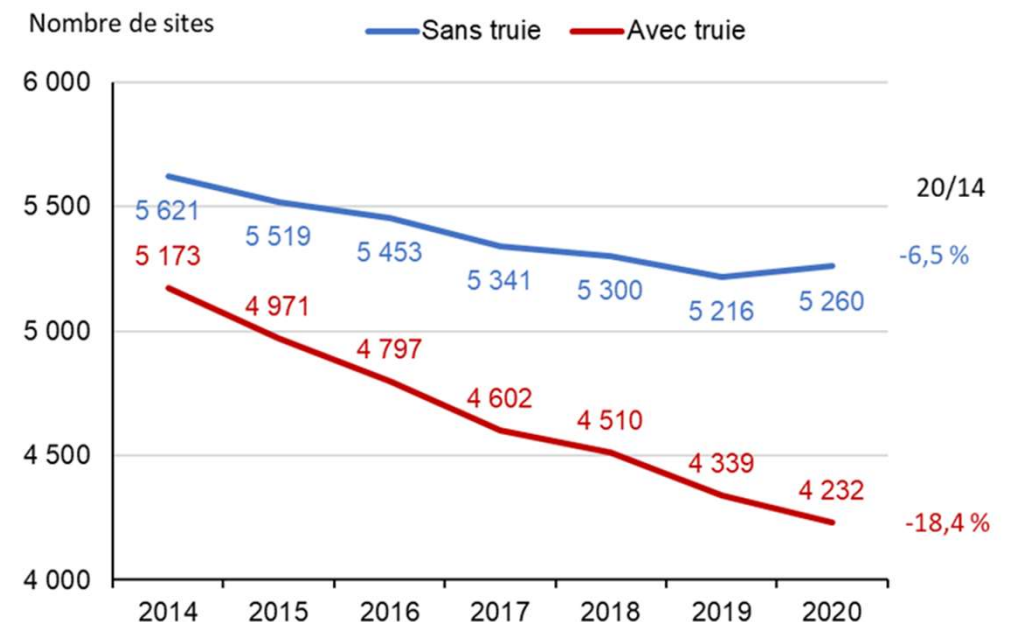
Most of the production with Farrow to finish Farm

- **Farrow-to-finish system: 80% of sows and 61% of fattening pigs**

- **Socially acceptable system:** no movement of animals
- **Less health risks**
- **Highly specialized breeders**

- **Structural concentration,**
faster on farrowing than fattening

- **In 6 years, one pig site out of 8 has disappeared**
among which 70% of sites with sows
- Production was nearly maintained over the last decade
thanks to the **gain of sow productivity**



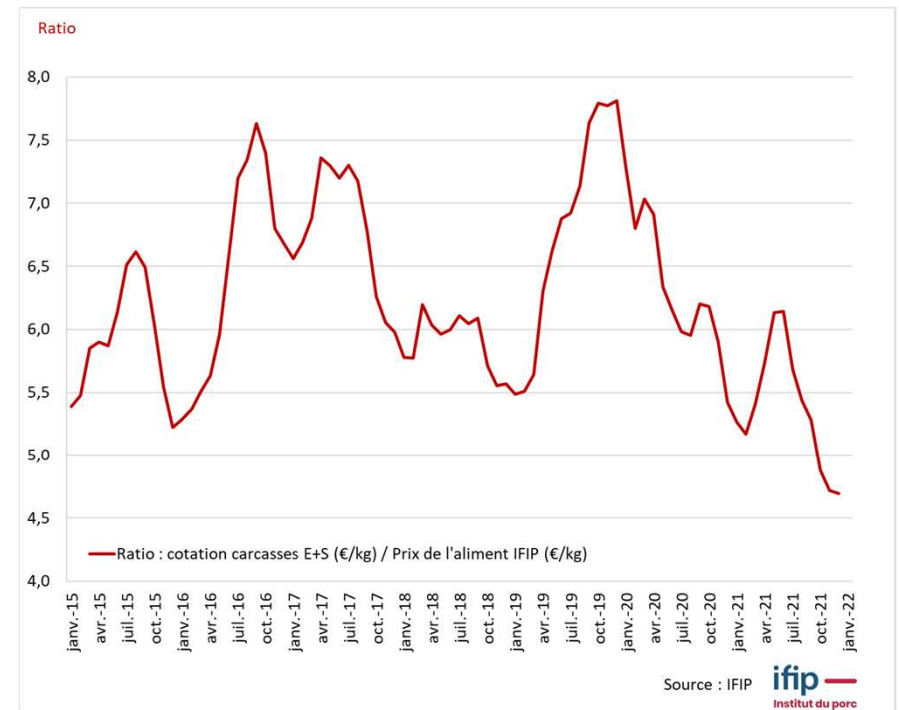
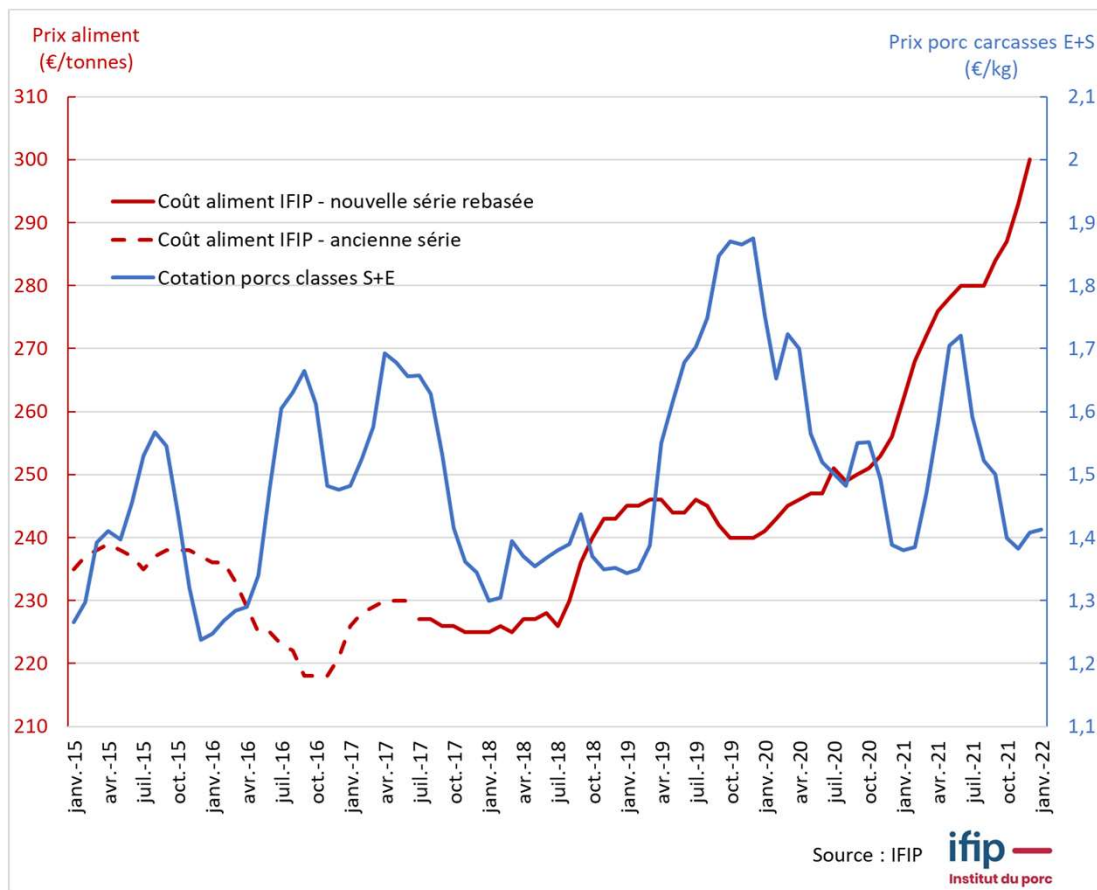
French Pig production



- **Families Farm: Capital and Labour**
- **Most of the production with farrow to finish farm**
- **Great diversity** remains of pig sites (activity, size), pig farms (types of production, economic size, work, etc.), and pig farmers' capacities and objectives
- **Competitive level of technical performances and production costs**
- **Search for autonomy: 45%** of pig feed produced on the farm in France
- **Valorization of effluents**



No breeder can survive with such scissors effect

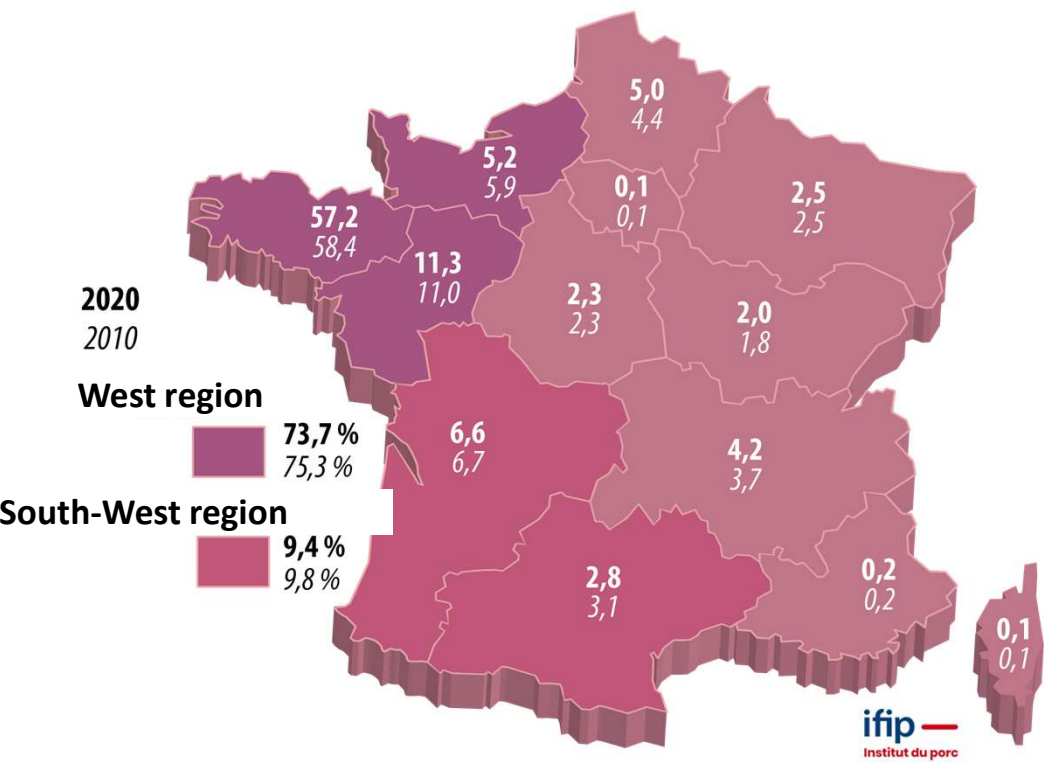


AG AGRIAL vendredi 4 mars 2022

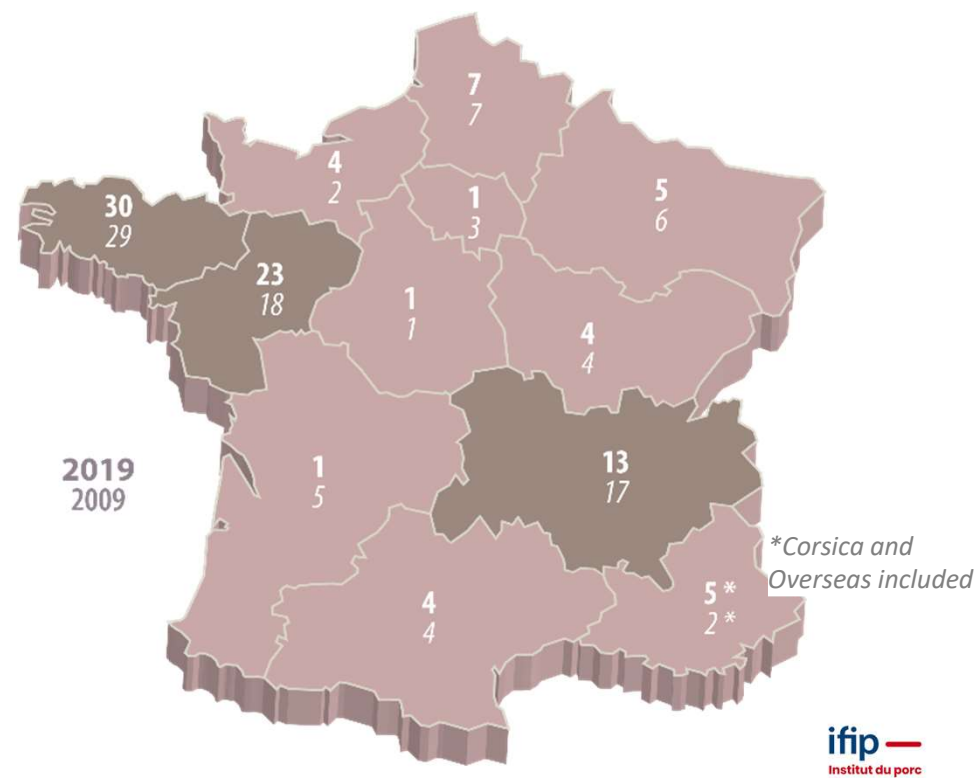


75% of the production : 310 companies processing pork meat

On-farm Pig production per region (%)
10,000 family-owned pig farms



Pork meat processing per region (%)
310 Small to medium-sized processing companies



Future of French Pig production

- **Projections at 5 – 10 years**

- ✓ Decline in the number of breeders and sites

- Drop in production ? limit to compensation through productivity gains

- **Challenges**

- Farrowing activity → to increase the number of **collective farrowing sites**
- Fattening activity →
 - Collective strategy focused on the search for value (**contracts**),
 - **economies of scale** (piglet production, energy production, etc.),
 - **complementarity** (slurry / grains)
 - **Strengthen the link via quality initiatives** and/or the French pork initiative;
 - Enhance the value of the fabric of **French SMEs and charcuterie companies**



Food for thought :

- No specialized pig production: a more resilient model
or risk of stopping the pig production ?
- Promote development of self-sufficiency feeding :
critical for independant breeders ?
- The role of contractualization
via production organizations or private contracts
- Strengthen the link between breeders and processors via quality initiatives :
added value for SMEs and charcuterie companies
- Answer consumer/citizen request
to label the origin (country) of pigs on the packagings



Additional points to consider at European level

- Ensure european cohesion: harmonization of standards
- Define the rules in terms of animal welfare and environment
- Implement a plan to reduce the number of wild boars to fight ASF in Europe
- Consider the promotion of meat supported by european promotion funds



INAP RC

Thank you for your attention
Questions ?

