

# INAP RC

**French Pork Interbranch**

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# Agenda

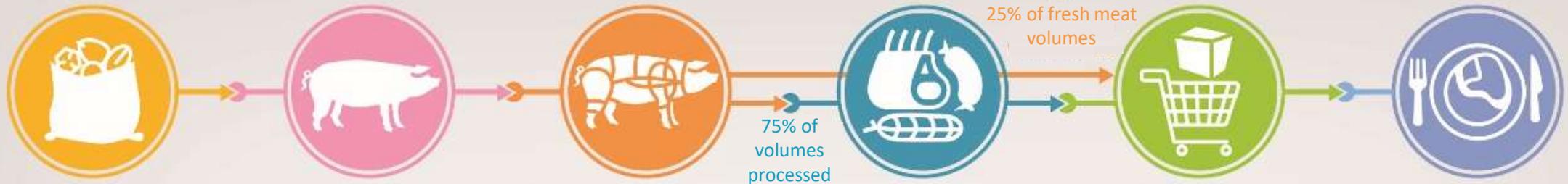
- The french interbranch : INAPORC
- Key figures of the french production
- Thoughts for a resilient porcine production

# 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

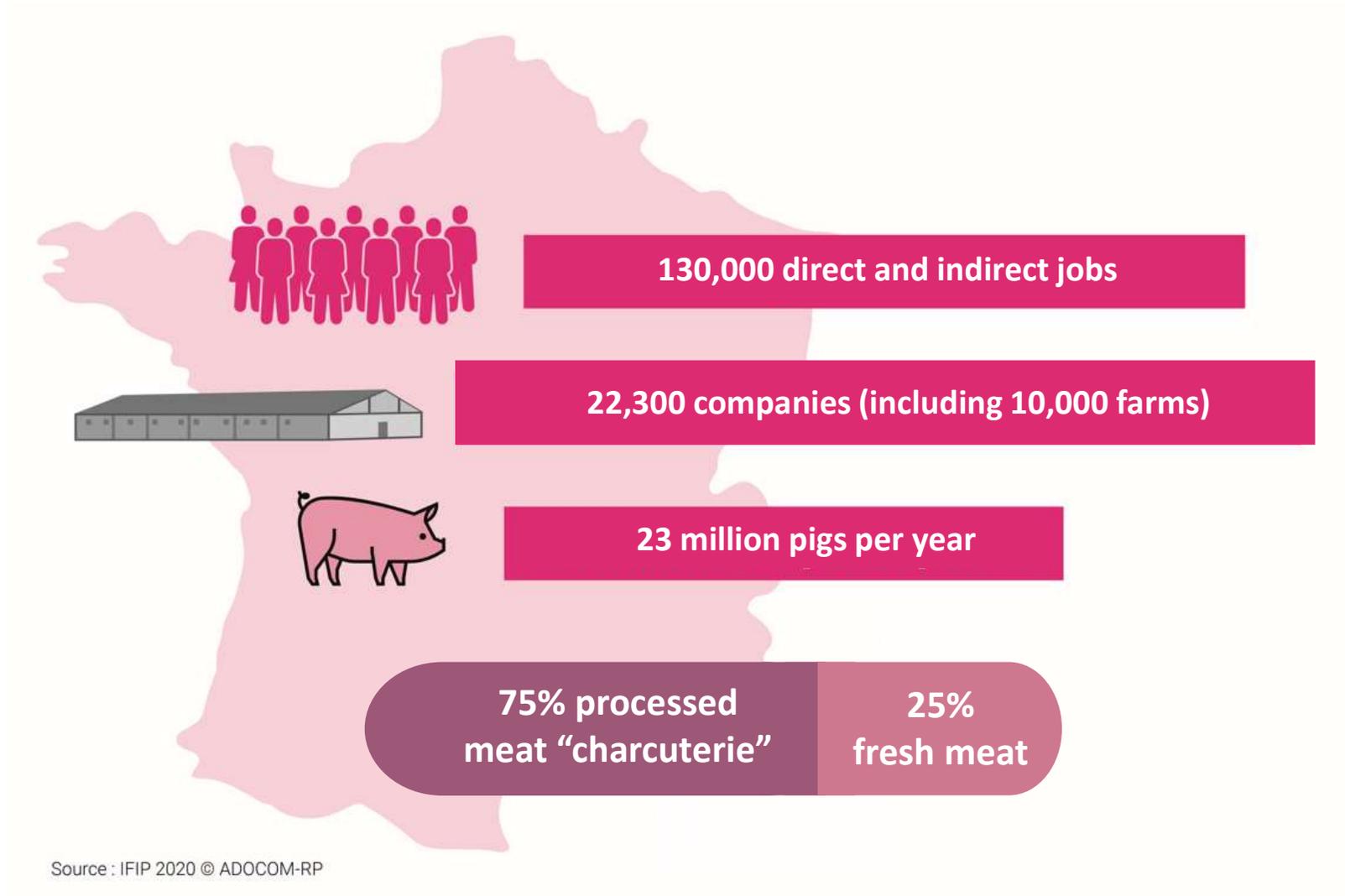
75% of volumes processed

25% of fresh meat volumes

# Agenda

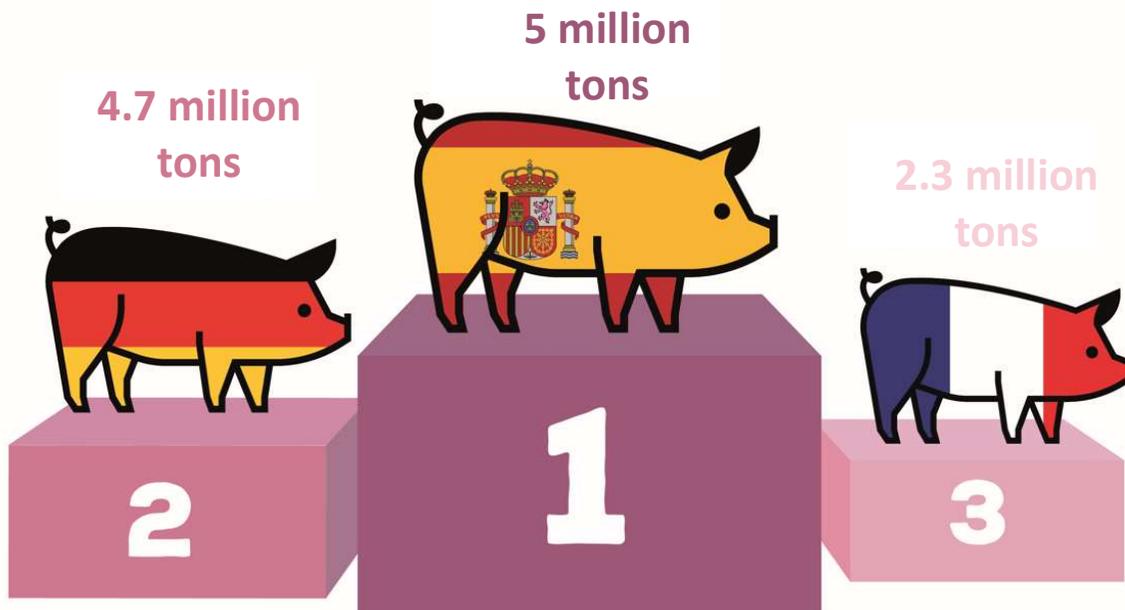
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# The pork industry in France



# 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

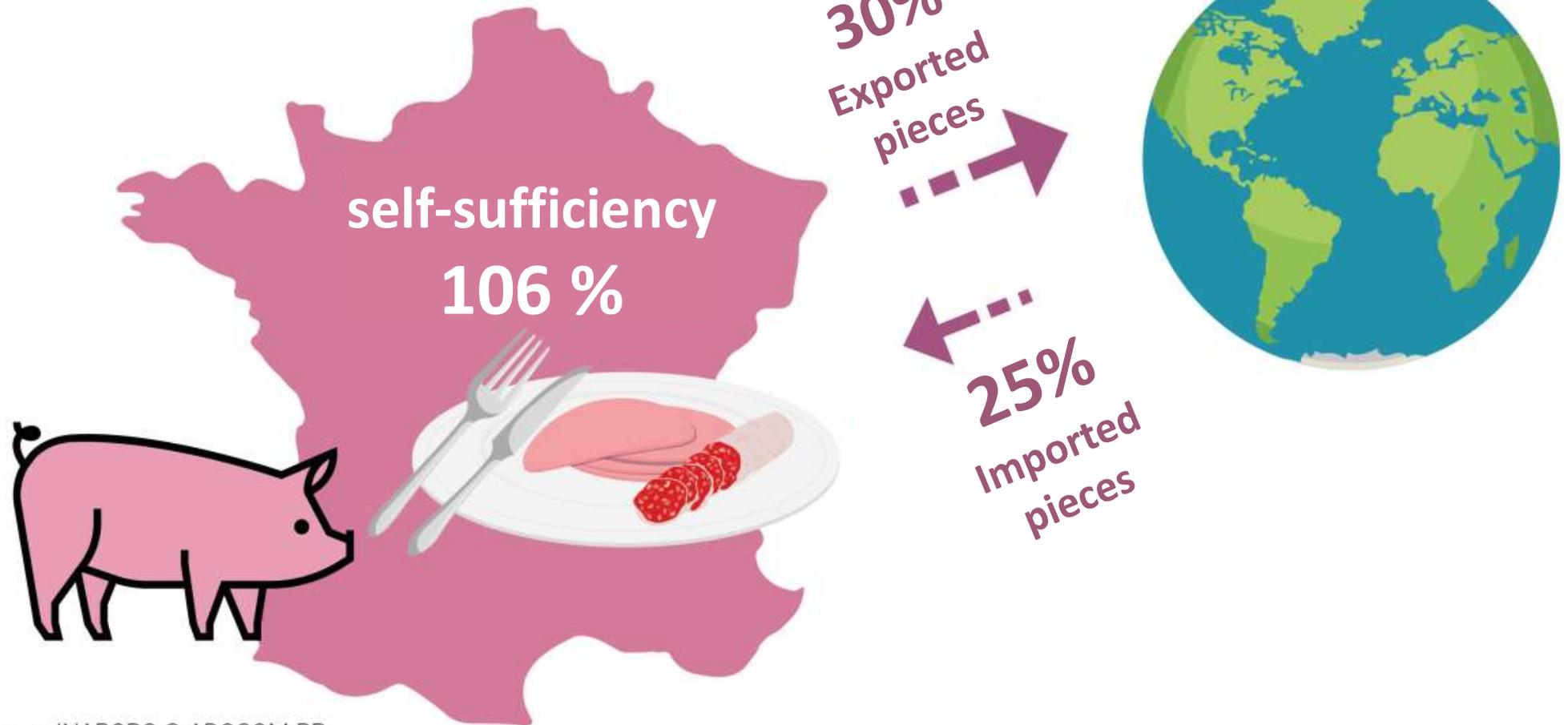
Pork: 1st meat consumed in France



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

# Food Sovereignty

France, self-sufficient in pork



# Agenda

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# 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

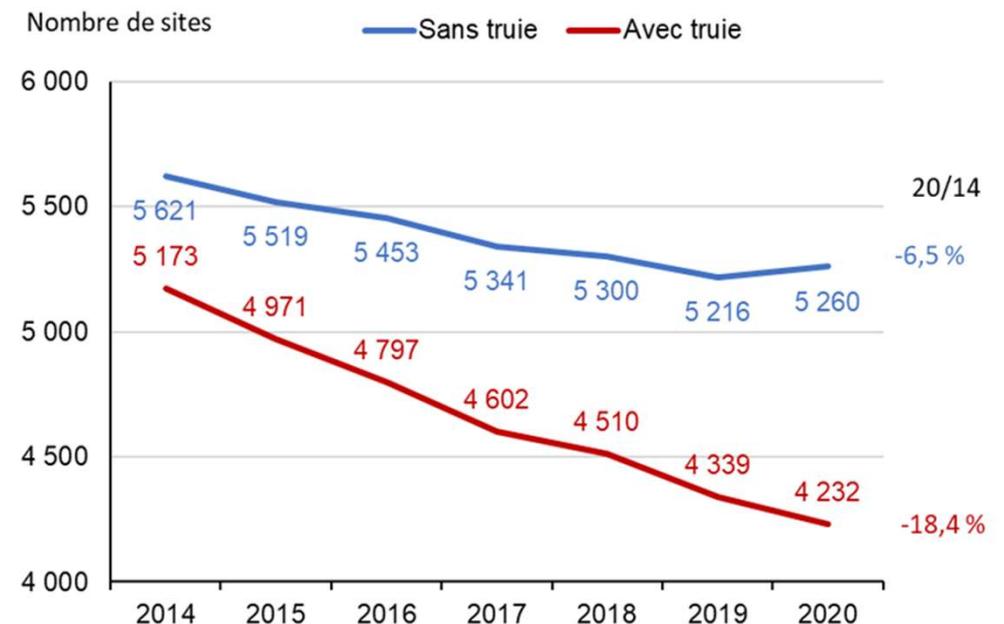
- **Farrow-to-finish system: 80% of sows and 61% of fattening pigs**

- **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**



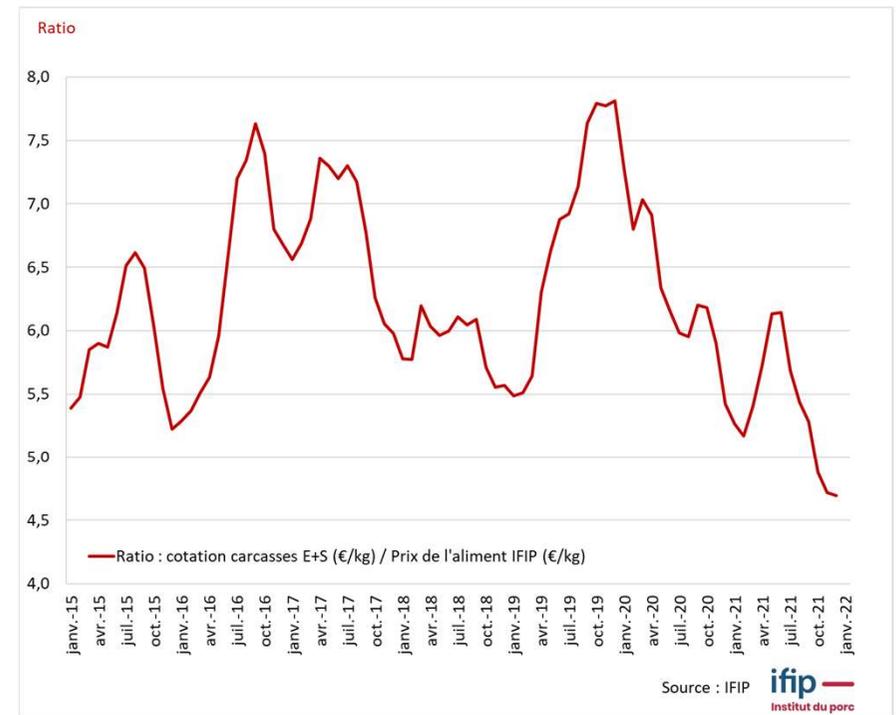
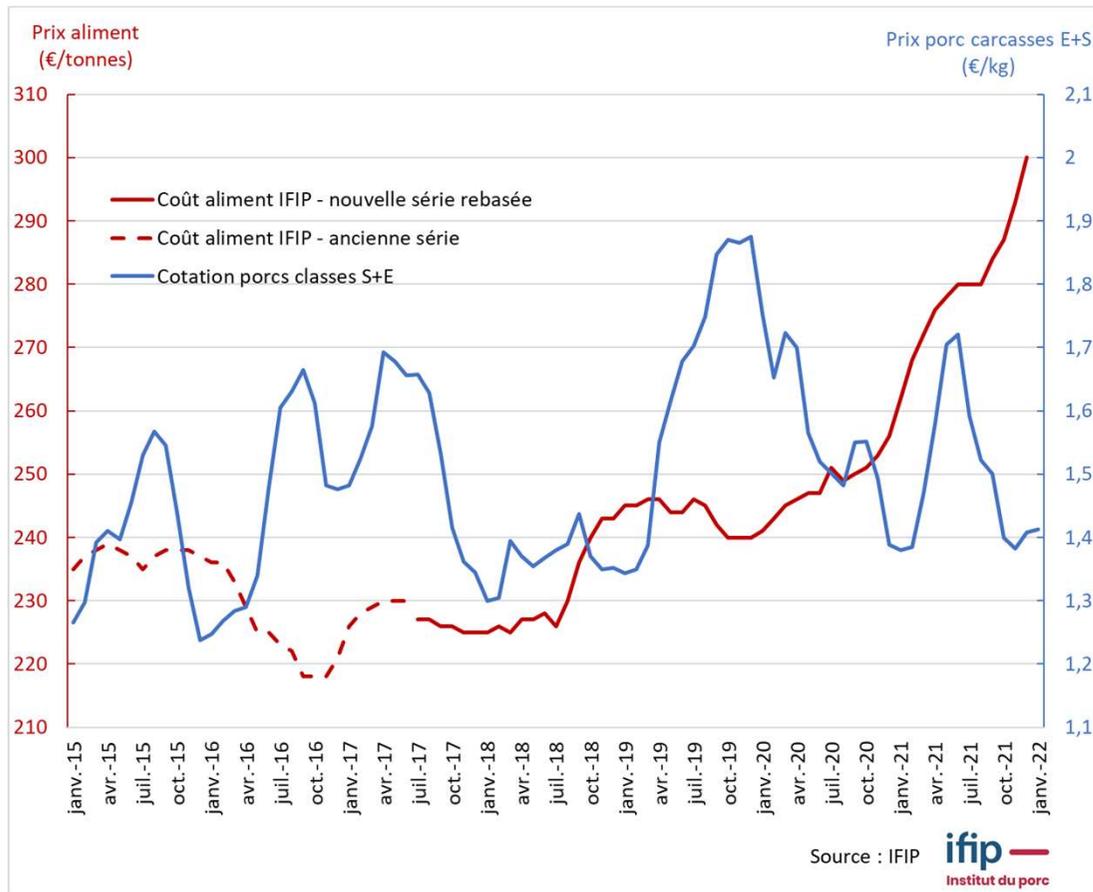
# French Pig production



- **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



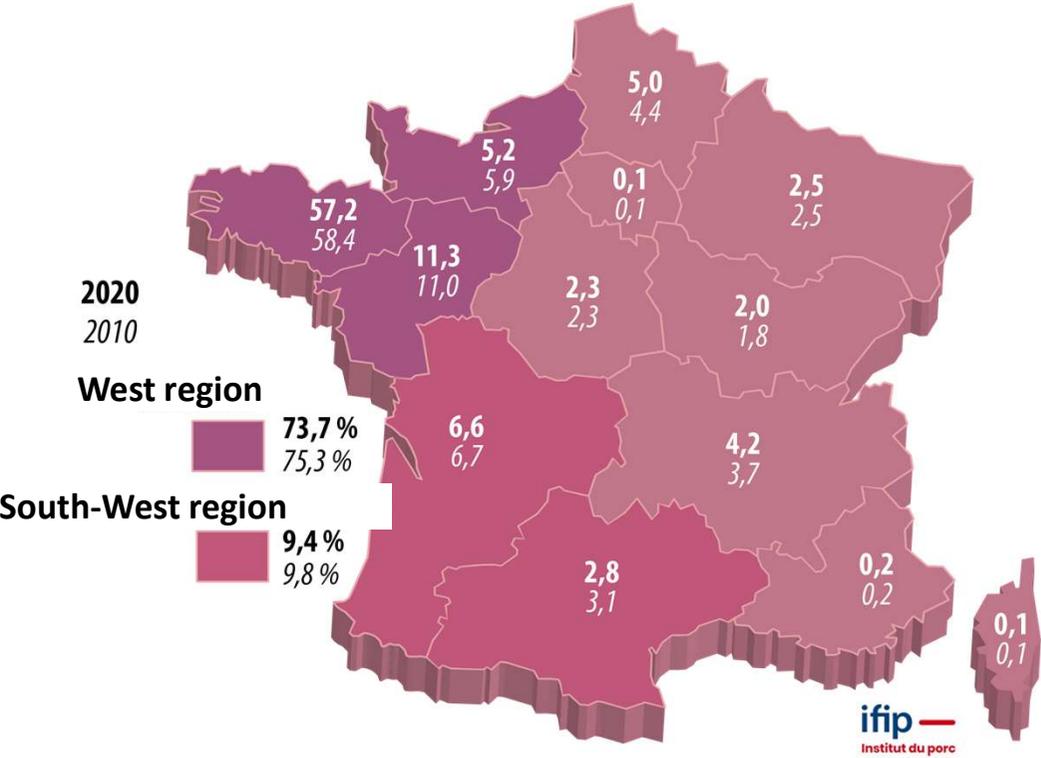
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# 75% of the production : 310 companies processing pork meat

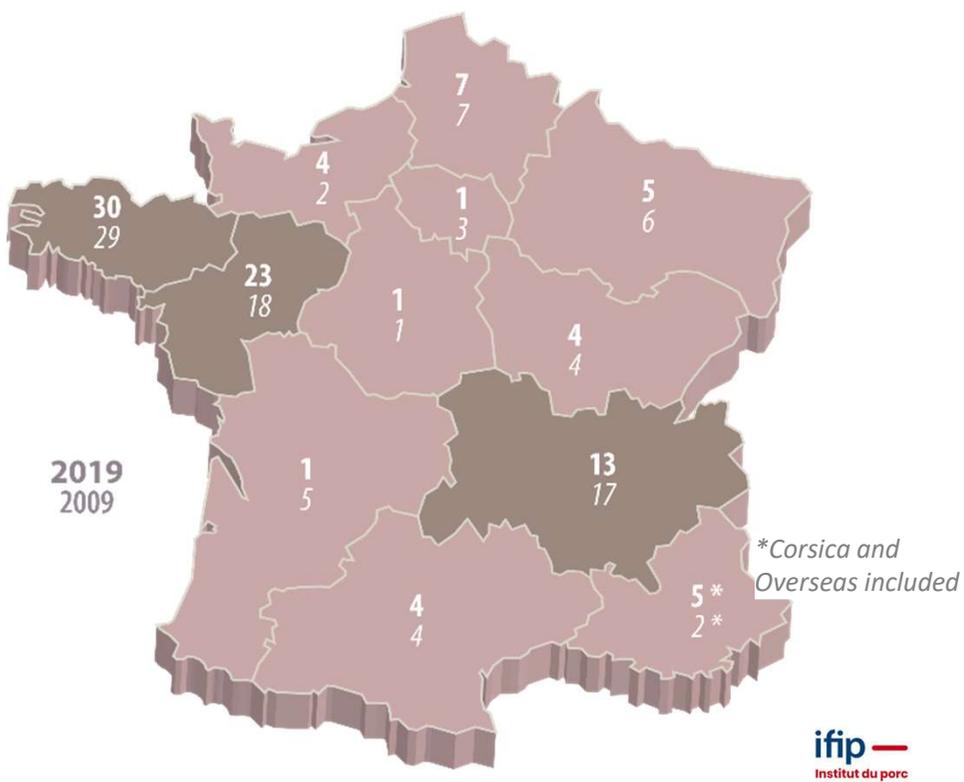
**On-farm Pig production per region (%)**

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 ?**

