Competitiveness of French pig industry: Key Data and Challenges

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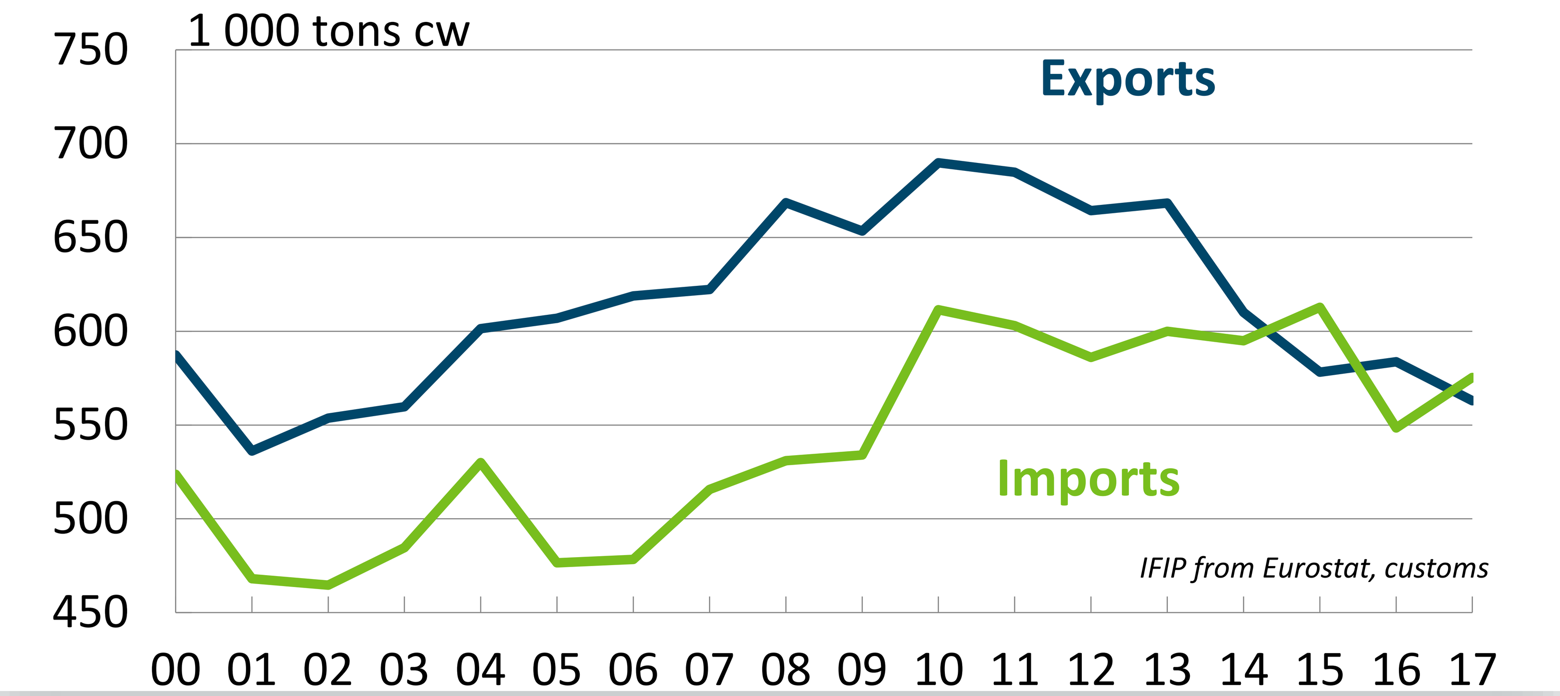
Key figures of the French Pig Industry

Production
3rd European pig herd
3rd European producer
2.2 million tons cw (2017)

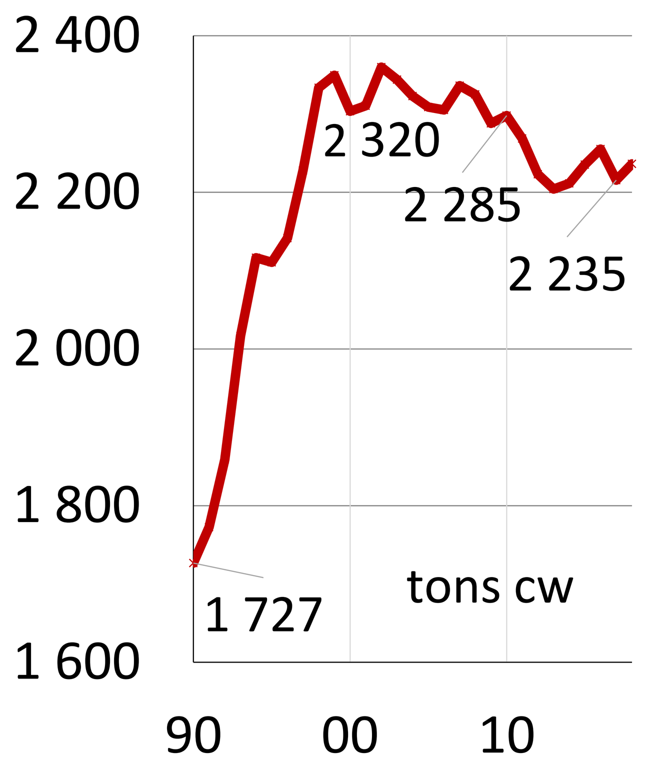
Import-Export
6th European exporter
701 000 tons cw in 2017 (- 9% in 17/16)

Consumption
33 kg / capita in 2017
(-7.2% since 2000)



Production

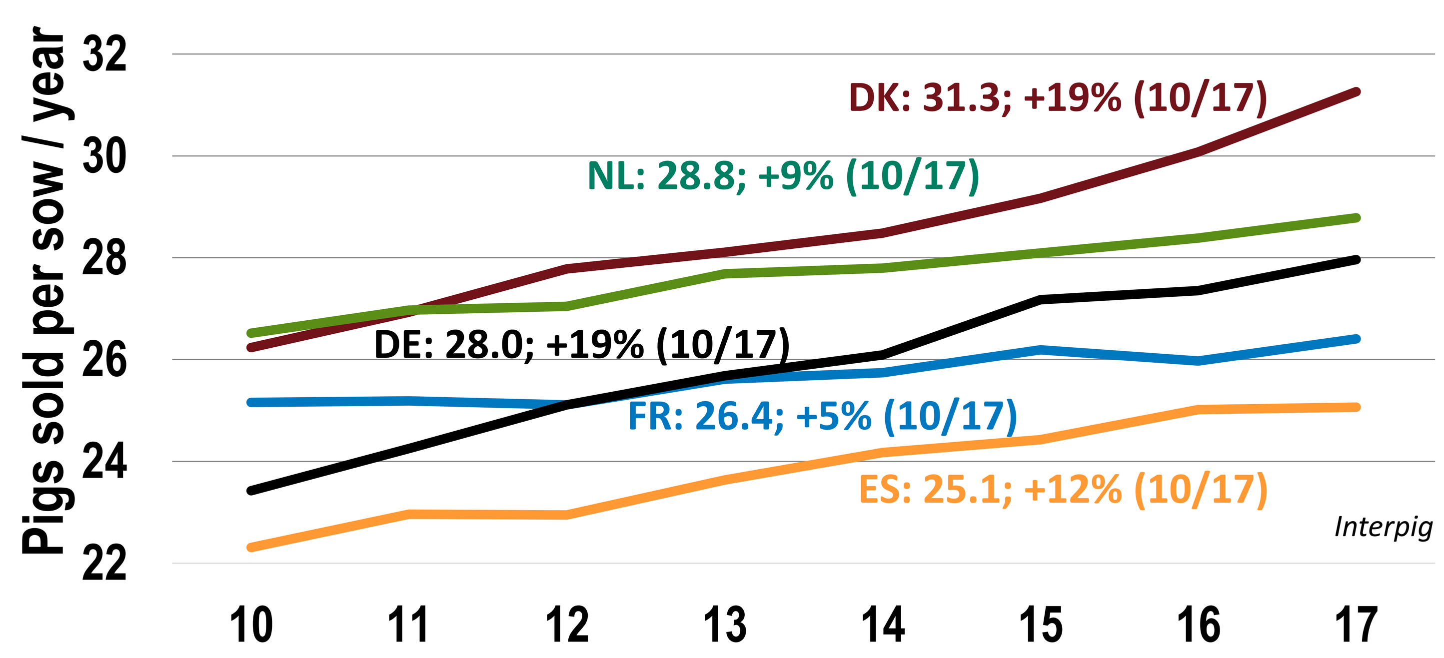
Pig production (1990 - 2017)



Number of farms and activity

Year 2017	Number of sites	Piglets (heads)	Finishing pigs (heads)
Total, of which	10 076	11 007 308	22 513 158
Farrow to finish	42%	41%	62%
Breeding	7%	50%	0%
Fattening	51%	8%	38%

Sow productivity (2010 - 2017)



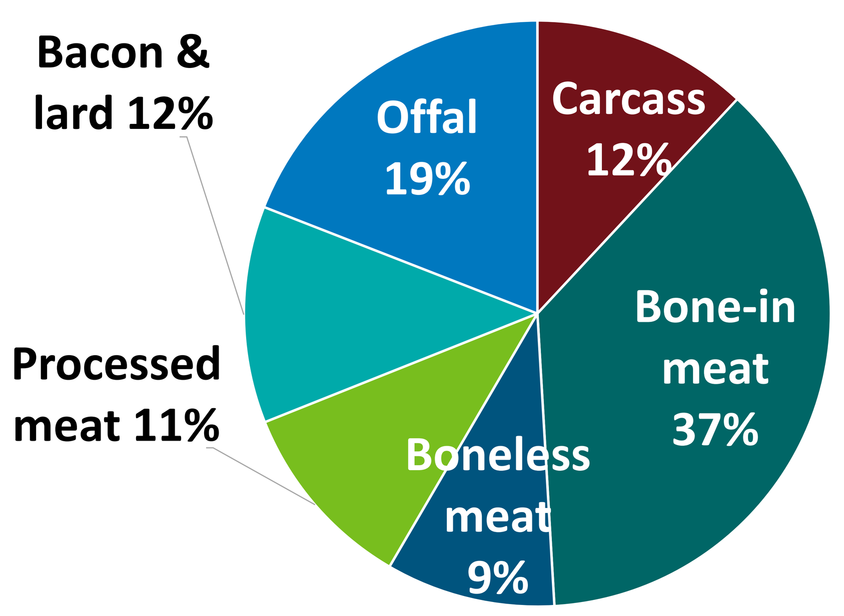
Issues at farm level

- Transmission and **installation** (aging of farmers)
- **Modernization** (aging of buildings)
- **Financing** of the agro-ecological transition (animal welfare, environment, ...)

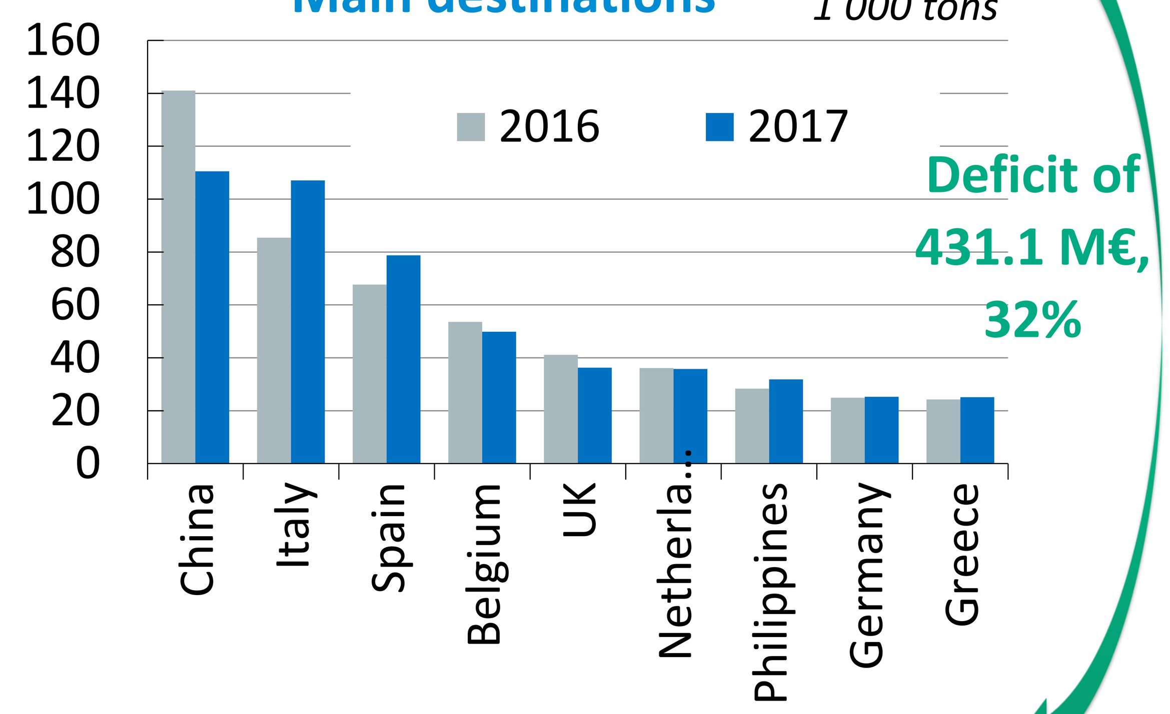
Import-Export

Export 2017 (all products exc. animals): **1 349.8 M€** of which EU: **906.1 M€**

Exported products: 2017

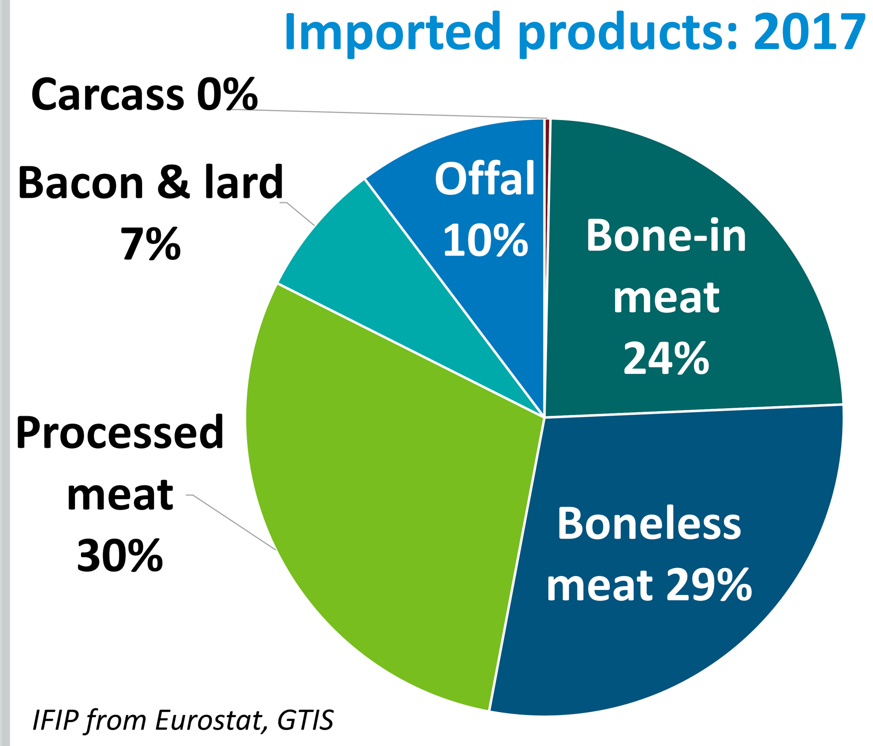


Main destinations



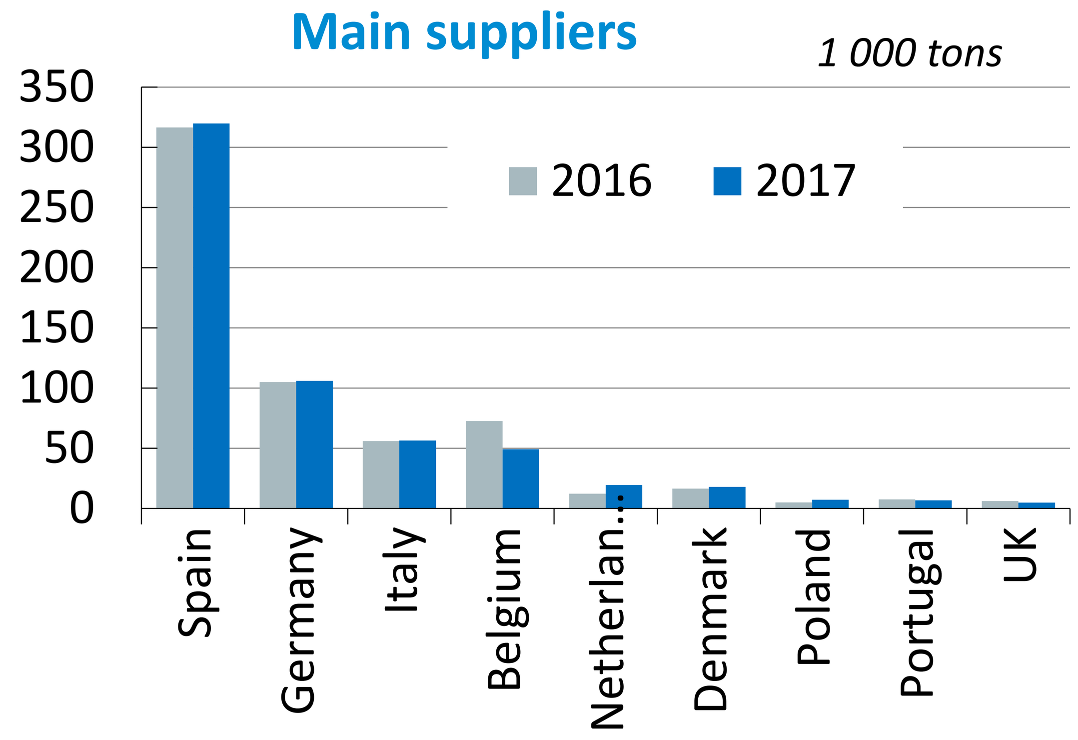
Import 2017 (all products exc. animals): **1 780.9 M€** of which EU: **1 776.6 M€**

Imported products: 2017



IFIP from Eurostat, GTIS

Main suppliers



- **Lack of ham** (import of boneless meat)
- **Market at balance** (in volume)

➢ Import of high-value-added products *vs* export of low-value products
➢ More focused on the internal market (use of traders to export)

Slaughtering and Cutting Sector

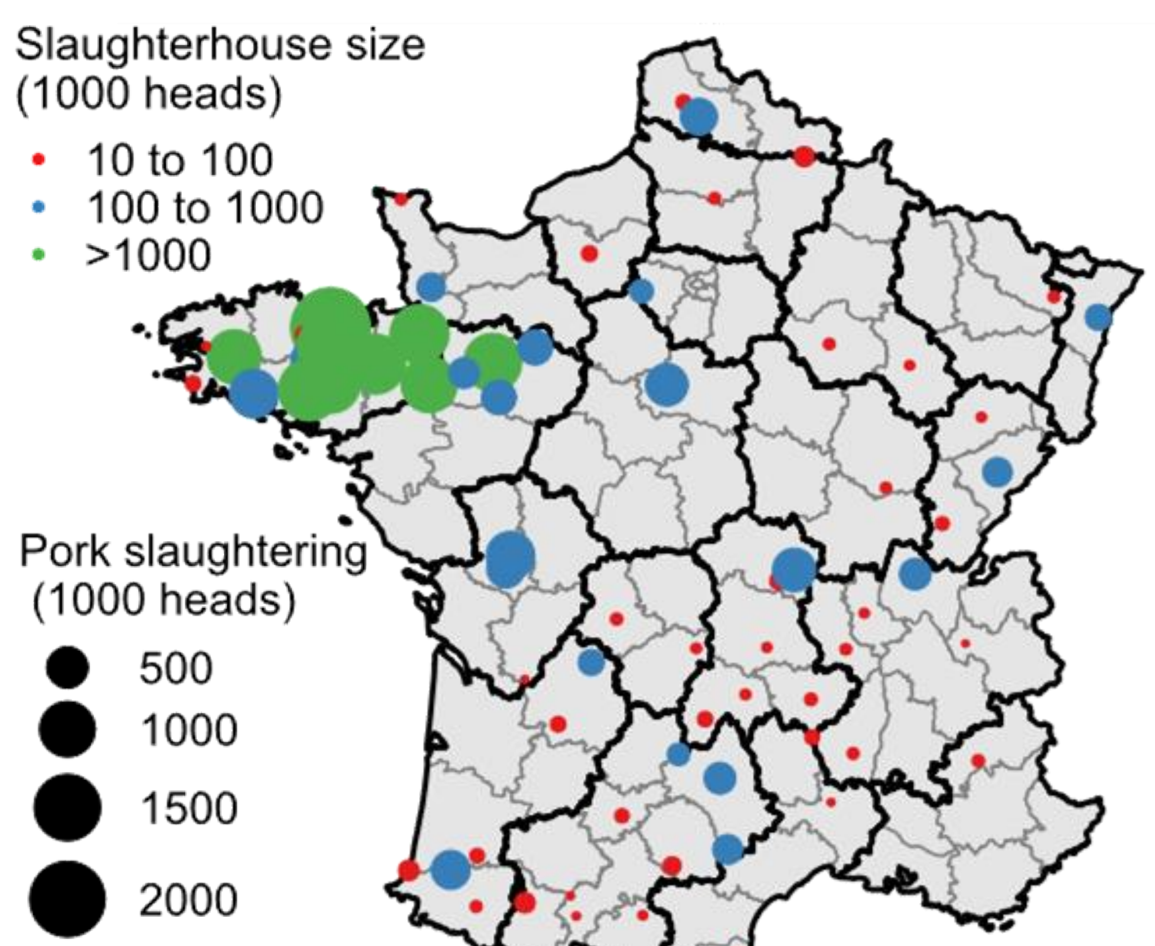
Some catching up to do

- Competitive disadvantage on **labour cost** (Germany, Spain)
- **Modernization and automation**

→ Low margin and lack of investments, although improving since 2015

- French market is mature and standardized

→ concurrence between slaughterhouses



Challenges and Perspectives

Very strong controversies
Animal welfare, environmental impact, antibiotic use, intensive farming, meat consumption → **innovation in pig farming**

Changes in consumer demand
Type of production: ethical, local
Type of products: processed

→ How to meet different market expectations?
Segmentation, contacts, market valuation

Laws evolutions support these changes
„EGALIM“: quality upgrading, value sharing within industry, contractualisation