PORK

Industry sheet

Key statistics

2,2 million tonnes of pork produced in France in 2018
3e European producer
32 % of production exported for €1,2 billion
28 % dof pork consumed imported for €1,6 billion

INDUSTRY STRUCTURE

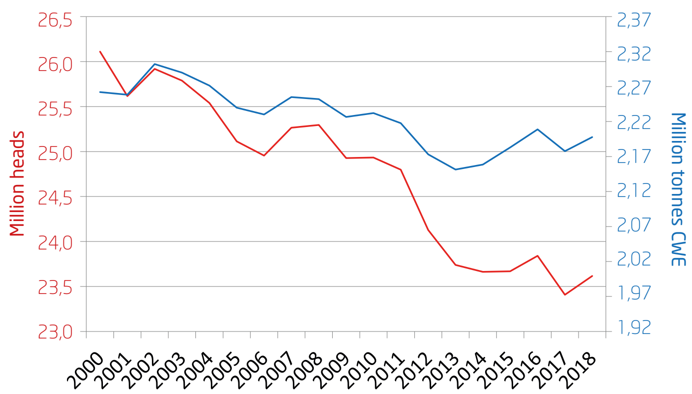
Farmers are grouped in 32 commercial producer organisations, known as producer groups, which are part of the cooperative sector. 90% of French pig production is marketed by these 32 groups, and 10 of these organisations market 77% of the pork pigs placed on the market. These producer groups are increasingly involved in links in the supply chain upstream (genetics, animal feed, training, advice, help starting up projects) and downstream (slaughtering/butchering, trade, processing) of production. However, the cooked pork industry remains relatively independent, which allows it to obtain supplies from the European market and take advantage of good prices.

PRODUCTION

France is the 3rd biggest pork producer in the European Union. :

- In 2018, the national herd stood at:
  - 13 million heads
  - Including 1 million sows and 7 million pigs for fattening.
- Farms in Western France account for more than 80% of French production: Brittany (58%), Pays de la Loire (11%), Nouvelle-Aquitaine (7%), Normandy (5%).
- In 2016, France had around 9,000 farms, 4,800 of which had more than 50 sows (98% of the herd). The breeder-fattener model is predominant in France.
- The average size of a French breeder-fattener farm (47% of sites and 72% of pigs) is 200 sows.
- In 2018, France slaughtered around 23.5 million pigs, for a volume of 2.2 million tonnes CWE (carcass weight equivalent), or 9% of European production. Since 2000, production has fallen significantly in terms of heads (see graph), but less so in terms of volume (carcass weight equivalent) due to an increase in the average weight of the animals slaughtered.

Development of French production 2000-2018



Source FranceAgriMer from SSP

PROCESSING (SLAUGHTERING)

In France, 29 slaughterhouses each process more than 100,000 pigs per year. They account for 94% of all pigs slaughtered nationally. The 12 largest (more than 700,000 pigs per year) are located in Western France: 10 in Brittany, 1 in Mayenne and 1 in Deux-Sèvres. The two leading companies on the national market, Cooperl Arc Atlantique and Bigard, each account for around 20% of French slaughter capacity, with several high-capacity facilities.

PROCESSING (SALTING)

The salting industry produces 1.1 million tonnes of cooked pork products. This sector accounts for more than half of all French pork production output.
310 establishments generate an annual turnover of €6.7 billion (2018). Many cooked pork companies are SMEs; in total they employ 37,000 people.

SALE

Nearly 70% of French pork is intended for the French processing industry; 25% of French meat (excluding offal), mainly loin, is sold fresh, the rest is exported to the intra-EU market (Italy, Spain, Belgium, United Kingdom, Germany) and to third countries (China, Philippines, etc.).

CONSUMPTION

- 2.1 million tonnes CWE (carcass weight equivalent) of pork were consumed in France in 2018. Per capita consumption stood at 31.9 kg CWE per year in 2018.
- Cooked meat products account for three quarters of consumption, and unprocessed meat one quarter.
- While overall consumption calculated on the basis of the balance sheet shows a limited decrease in the medium term, the share of household purchases, as assessed by the Kantar Worldpanel consumer panel, is trending more strongly downwards, both for raw muscle (pork chop, pork roast) and charcuterie. In this respect, pork is undergoing similar changes to other meats in terms of household purchases (ovine, beef, poultry). This growing gap between total consumption and household consumption appears to be the result of the simultaneous development of out-of-home catering (circuits that are on the increase due to new consumption patterns such as fast food and snack options).

TRADE

- French exports of pork products stood at around 645,000 tonnes CWE in 2018, to which must be added 130,000 tonnes of offal, for a total turnover of €1.3 billion..
  - fresh and frozen meat: 450,000 CWE
  - processed products: 100,000 CWE
  - fats: 35,000 CWE
  - live animals: 60,000 CWE

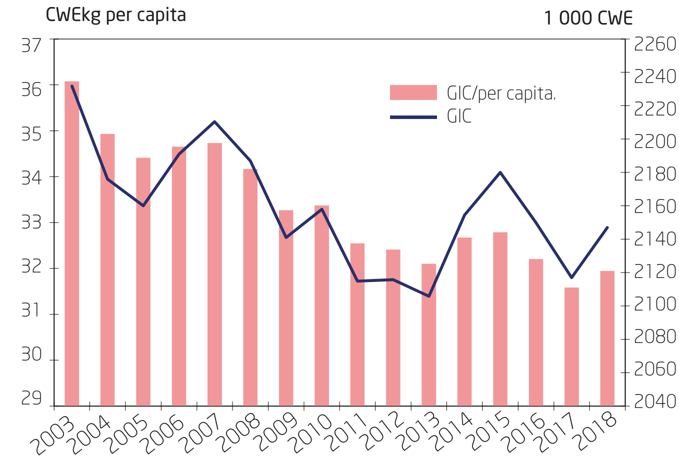
By value, exports were 70% intra-EU: Italy (15%, €210 million), Belgium (13%, €170 million), Germany (8%, €105 million), etc., and 30% third countries: China (14%, €185 million), Japan (4%, €60 million), Philippines (4%, €50 million), etc.

- France's imports around 600,000 tonnes CWE per year, to which must be added 70,000 tonnes of offal, for a total amount of €1.6 billion.
  - fresh and frozen meat: 350,000 CWE
  - processed products: 210,000 CWE
  - fats: 35,000 CWE

By value, France's main supplier is Spain (46%, €750 million), followed by Germany (18%, €290 million) and Italy (16%, €270 million).

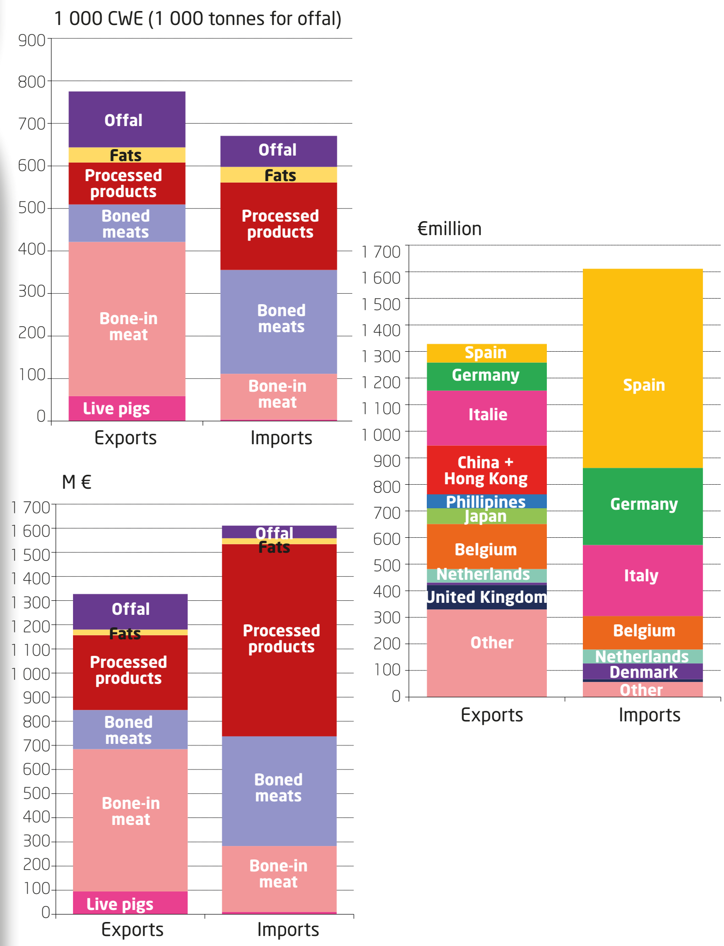
- France's trade balance in tonnage was positive in 2018 (+105,000 tonnes). In terms of value, on the other hand, it showed a deficit of €280 million. This was due to an unbalanced trade structure (exports of raw materials, imports of processed or semi-processed products).

Total and per capita French consumption



Source : FranceAgriMer from SSP and French customs

French trade (2018) by type of product (volume and value) and by country



Source : FranceAgriMer from French customs