

RUMINANT LIVESTOCK FARMING AND THE FRENCH FOOD SOVEREIGNTY



**« How ruminant livestock contributes to
the food sovereignty in France? »**

1

In France, the trade balance for ruminant products is positive. This strength notably lies in the fact that the production exceeds the consumption in dairy products and live cattle.

Moreover, quality initiatives are of great interest for export.

2

Ruminant farming reduces its dependence on imported proteins by enhancing the proteins in forages and using locally produced protein crops. At the same time, it promotes more efficient and sustainable agriculture,

notably by producing organic fertilizers (livestock effluents), reducing our dependence on imports of chemical fertilizers.

3

The French territory, thanks to its grassland areas, which are not very suitable for cultivation but are valued by ruminants, plays a crucial role in protein production for human consumption while providing numerous environmental services.

4

The maintenance of our food sovereignty depends on the economic resilience of agricultural sectors, particularly for livestock farming.

Improving their income and strengthening the competitiveness of ruminant livestock sectors are essential priorities to ensure sustainable production and maintain French farms.

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WHAT ARE WE TALKING ABOUT?

FranceAgriMer defines food sovereignty as the « **capacity of a State to self-determine its food systems within its territory** » and adds that « *thinking about food sovereignty does not necessarily mean striving for absolute independence but ensuring sufficient control over external dependencies considered as relevant, necessary, or indispensable* » (FranceAgriMer, 2023).

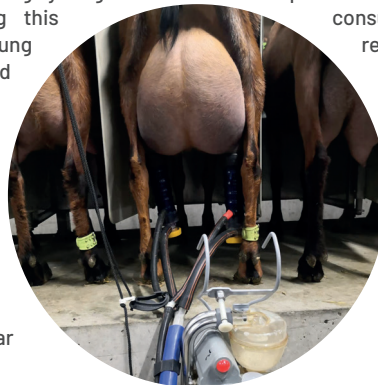
Today, France is largely sovereign in terms of food, but its situation has deteriorated over the past ten years. Depending on the products, the situations are very contrasted: sometimes self-sufficiency has significantly decreased (e.g., fava beans for export), and the situation of other products has improved, notably in the case of soybeans and sheep meat, for which our dependence on imports has decreased.



decreased (-9% between 2013 and 2023), while that of ovine and caprine meat has seen a more significant decrease (-18% in 10 years). Among the significantly deficient productions, self-sufficiency in ovine meat has recently improved due to a decrease in consumption only impacting imports (FranceAgriMer, 2023). It should be noted that over the past decade, poultry meat consumption has significantly increased. At the same time, we observe an increasing use of cereals in the energy sector, which puts them in competition with human and animal nutrition.

• A decreasing production

Between May 1, 2016, and May 1, 2024, France lost 606,000 suckler cows and 395,000 dairy cows, which stands for a loss of more than one million cows in 8 years. Between 2022 and 2023, the decline in large bovine slaughtering was significant (-4.1%), even though young bulls resisted better. During this same period, exports of young cattle significantly declined (-7%) and calf production also decreased (-6%), with unreplaced retirements and sluggish demand leading to a reduction in placements. (Idele, 2024b). Goat and sheep milk production, on the other hand, has remained stable (Idele, 2024c; Idele, 2024d). Similarly, over a 10-year



period, the production of cow's milk, beef, and ovine-caprine meat each fell by 8% between 2013 and 2023.

• Increasing imports

The import of dairy products increased by 8% in 10 years and stood for 33% of consumption in 2023. Imports of beef remain relatively stable. In 2022, France imported 26% of its consumption of beef and finished livestock (in volume, including veal), compared to 24% in 2012 (Idele, 2023b). Although meat consumption remains stable, habits are changing: the population consumes more often in out-of-home catering than in large-scale retail. In out-of-home catering, the origin of the meat, more often imported, is generally not displayed or is barely visible, making consumers less vigilant despite their expectations. In sheep farming, France remains structurally dependent on imports (Ministry of Agriculture and Food Sovereignty, 2023), although imports have decreased by 28% in 10 years, with imported consumption representing 56%. This overall increase of imports, linked to a decline in national production and combined with stable consumption, exacerbates the risk of reducing our food sovereignty.

THE SITUATION IN FRANCE

A risk of a decline in our food sovereignty arises from consumption that holds up better than production, which leads to increased imports:

• The consumption remains robust

In France, the consumption of products from ruminant farming decreases very little. Individual consumption of dairy products remains stable, around 310 liters of milk equivalent per capita per year. Individual beef consumption has slightly

INDICATORS OF THE FRENCH BALANCE FOR SOME AGRICULTURAL AND AGRO-FOOD SECTORS AVERAGE OVER LAST 3 YEARS (FRANCEAGRIMER, 2023).

Production	Self-supply rate	Coverage rate of consumption by production	Export capacity	Dependence on imports
	<i>Production / Consumption</i>	<i>(Production – Exports) / Consumption</i>	<i>Exports / (Production + Imports)</i>	<i>Imports / Consumption</i>
Sheep	53%	47%	5%	53%
Beef meat	95%	79%	13%	21%
Cream	103%	64%	28%	36%
Cheese	120%	64%	36%	36%
Butter	78%	60%	15%	40%
Skim milk powder	265%	74%	66%	26%
Whey powder	178%	67%	53%	33%
Yogurts	111%	96%	13%	4%
Barley	292%	95%	67%	2%
Corn	142%	89%	35%	8%
Soy	48%	32%	14%	67%
Faba beans	106%	78%	22%	20%

1 French food sovereignty with regard to ruminant products

A positive French trade balance, notably thanks to dairy products and live cattle

Some productions, such as dairy products, are produced in excess (self-sufficiency rate > 1). They therefore have a high export capacity. These surplus productions allow the French agri-food trade balance to remain positive. Indeed, with exports representing 0.3% of the French Gross Domestic Product, the dairy sector provides France with a trade surplus of 3 billion euros, making it one of the main excess items in French agricultural trade (FNPL, 2023). Nevertheless, although France is a net exporter of dairy products, it supplements part of its apparent consumption with imports, which are partly explained by an imbalance in the consumption of protein (in excess) and fat (deficit).

Like dairy products, live cattle partly influence the positive French trade balance. Their trade balance (exports - imports) is not insignificant since it represents more than 1.5 billion euros in 2022. Moreover, the number of exported cattle is a potential resource for increasing the volumes fattened and slaughtered in France, in addition to maintaining the cattle herd.

Other animal productions such as sheep meat are in a situation of structural deficit (self-sufficiency rate < 1) and therefore depend on imports, although the situation has improved (FranceAgriMer, 2023). In 2023, 44% of the national consumption of ovine meat is French (Idele, 2024d). In beef, although the self-sufficiency rate is declining, it remains very high (95%). In goat meat, the self-sufficiency rate approaches 120%.



KEY FIGURES

Dairy farming is the leading agri-food industry in France, with **43 billion €** income in 2020 (ELEC, 2024 Insee data, esane 2021).

France is:
- the **leading** European exporter of whey (with 20% of the volumes) and skim milk powder (17,6%) ;
- the **second** exporter of baby milk powder (33,8%) and butter (28,6%) ;
- the **fifth** exporter of cheese (MMO year 2023).

France is the **leading** consumer of butter and cheese in Europe (Idele, 2023b, data from FIL).

France is (in value terms) the **leading** producer of beef meat in the EU (Ministry of Agriculture and Food Sovereignty, 2024a).

The trade balance of live cattle represents more than **1.5 billion €** in 2020 (source Idele).

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1

French food sovereignty with regard to ruminant product

Quality, virtuous and value-enhancing approaches are of great interest for export and on national market

Premium products, resulting from quality initiatives, have a strong appeal for the French market but also for export. With, among others, its 51 PDO and 11 PGI dairy products, France positions itself as a major player in the international market for high-quality food products, thereby enhancing its terroir, gastronomic heritage, and artisanal know-how. For example, 25% of the Roquefort produced (PDO sheep's milk cheese) is exported, which amounts to 3,900 tons in 2023 (Idele, 2024d). The domestic market is the primary outlet for quality products, thanks to the good reputation of these products that meet the expectations of French citizens and consumers. However, the current purchasing power crisis, linked to inflation, puts price back at the top of consumers' purchasing criteria and puts quality sectors in difficulty.

LEARN MORE...

...about animal products in Human nutrition,

CHECK OUT THE SHEETS →

- « Ruminant livestock farming and the production of food for humans »,
- « Ruminant livestock farming and the gastronomic heritage »,
- « Ruminant livestock farming and the traditional heritage ».



KEY FIGURES

In 2022, the foreign trade of the French beef sector (beef, live animals excluding breeders, offal) represents **3 billion €** for exports and **2.4 billion €** for imports (Idele, 2023b).

In 2022, **46%** of the sheep meat consumed in France came from France (slaughter) (Idele 2023d, data from SSP and French customs).

France is the world's leading producer of goat cheeses, with **120,000 tons** in 2023 (including farm production).

2

Ruminant livestock: a pillar for protein sovereignty and agricultural sustainability in France

Toward protein sovereignty in ruminant livestock in France

In France, the ruminant ration is essentially composed of feed produced on the farm. The main source of protein for ruminant herds comes from forages, including grass, produced locally. In order to provide a balanced ration, the addition of protein concentrates is essential. Thus, French livestock farming systems are 75% self-sufficient in protein on average at the farm level, but this depends on the proportions of grassland and forage maize in the animals' diet. Note that protein autonomy at the farm level varies depending on the types of production and even within the same productions. A system with lower protein autonomy does not necessarily mean that it imports a larger quantity of food. It can source locally, at the regional or national level. The objective of ruminant sectors is to strengthen the autonomy of farms as well as local supply, by limiting imports and increasing the capacity for sustainable production and the utilization of protein-rich forages (legumes, protein crops, multi-species grasslands, etc.). The objective is also to enhance the value of oilseed meals and seeds produced in France and Europe in livestock farming. Moreover, depending on the yields and digestibility of the proteins, but also if the climate and soil allow it, the production of protein-rich concentrates (peas, lupins, fava beans, whole, flattened, or grounded) allows livestock farming systems to be more autonomous. However, improving protein autonomy primarily involves optimizing the balance of the ration. The richer the basic ration is in protein, the less relevant the additional protein intake becomes. The 2030 Protein Plan aims to ensure national protein sovereignty by 2030. The latter includes a significant research, development, innovation, and transfer component: the Cap Protéines program (www.cap-proteines-elevage.fr).

Ruminant livestock contributes to more efficient and sustainable agriculture in its goal of food sovereignty

Ruminant farming utilizes coproducts from the food industry, which are not consumable by humans, as well as non-cultivable lands. Also, many farms are net producers of protein for human consumption. Also, by digesting plant matter, ruminant livestock farming produces high-quality organic fertilizers that are spreadable and essential for crops, reducing the need to import mineral nitrogen. In 2022, more than 80% of mineral fertilizers in France were imported, mostly in the form of urea, from countries outside the European Union (FranceAgriMer data). This creates a double dependency: on third countries and on fossil fuels used to manufacture mineral fertilizers (Ministry of Agriculture and Food Sovereignty, 2024a). Livestock effluents nourish plants, revitalize soils, and preserve biodiversity. This allows agroecosystems to remain productive and healthy, essential conditions to ensure sustainable food systems and our food sovereignty.



LEARN
MORE...

...about protein
autonomy,

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« Ruminant livestock farming and
animal feed ».

KEY FIGURES

Cap Protéines is:
a budget of
€20 million for the
research and development
€7.5 million for its
livestock component;
120 partner organizations;
330 pilot farms;
21 experimental sites and
19 agricultural high schools
mobilized and involved
(Idele, 2022b).

In France, the import of urea,
mineral, phosphate and
potassium fertilizers, as well
as other nitrogenous mineral
fertilizers, represents
€3,826 million.
To this is added the import
of organic fertilizers for
€106 million
(data FranceAgriMer).

In France, the nitrogen
input is estimated at
4.2 million tons;
50% come from the
nitrogen contained in
mineral fertilizers, sludge,
and composts (nitrogen
almost entirely derived from
synthetic fertilizers),
40% from the organic
nitrogen contained in
livestock excrement (**32%**
from herbivore excrement),
7% from the nitrogen
captures by leguminous
plants (symbiotic fixation)
and **3%** from atmospheric
nitrogen (deposition)
(INSEE, 2024).

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3 The quest for food sovereignty in France through the enhancement of the territory thanks to ruminant farming

The French territory is favorable to animal production

The areas that are always in grassland or used as pasture, not very suitable for cultivation, are exploited by ruminants capable of making use of grass and scrub, thus transforming these lands into livestock farming areas for human feeding. These areas play a crucial role in the production of proteins consumable by humans.

France's dairy surplus: an asset for global food security

France's trade surplus in dairy products allows it to contribute to global food security by supplying countries that do not have the pedoclimatic conditions favorable for dairy production.

French grasslands provide numerous environmental services

The presence of ruminants is intimately linked to the preservation of grasslands, which provide a multitude of environmental services: biodiversity preservation, carbon storage in soils, soil quality conservation, water quality maintenance and water flow management, landscape maintenance, fire prevention, etc. With its 13 million hectares of grasslands and 2.2 million hectares of rangelands, France thus dedicates a large part of its territory to environmental preservation. It is important to optimize national food sovereignty by promoting sustainable agricultural production conditions, such as those guaranteed by ruminants in the territories where they are present.

KEY FIGURES

In France, ruminant farming maintains **13 million** hectares of grasslands and more than **2.2 million** hectares of rangelands (Idele, 2022a).

France est the **fourth largest exporter of milk in the world**, after New Zealand, the Netherlands and Germany (FNPL, 2023).



LEARN
MORE...

...about the
enhancement of the
least cultivable areas,

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« Ruminant livestock and the least
cultivable areas ».

4

The economic resilience of farms and ruminant sectors in France

Our long-term food and agricultural sovereignty depends on the economic resilience of farms and sectors

The retention of farmers in all regions of France depends notably on the income they can obtain from their activity. Improving their income, including by strengthening the competitiveness of livestock sectors, is a priority to ensure our food sovereignty. Indeed the possibility of guaranteeing a decent long-term income will enable the maintenance of our production capacity. The government's plan to regain our sovereignty over livestock farming (Ministry of Agriculture and Food Sovereignty, 2024b) also highlights the adoption of a value chain approach, from upstream to downstream, to better and sustainably compensate French productions. This involves maintaining production and processing tools, creating and distributing added value, and encouraging consumers to prioritize sustainable and French products in their purchases. Nevertheless, improving farmers' income to enhance French food sovereignty must be done in parallel with actions to promote this profession, better familiarize people with it, and strengthen its attractiveness and the working conditions.

KEY FIGURES

Ruminant farming lost
20% of its workforce and
24% of its farms between
2010 and 2020
(Idele, 2023a).

LEARN MORE...

...about the attractiveness
of the farming profession,

CHECK OUT THE SHEETS ➔

- « Ruminant livestock farming and employment »,
- « Ruminant livestock farming and the livestock farming profession ».





ACTIONS AND TOOLS IMPLEMENTED BY THE SECTORS

Launch of the government plan to regain our sovereignty over livestock

During the 32nd Livestock Summit in October 2023, the Minister of Economy, Finance, and Industrial and Digital Sovereignty, as well as the Minister of Agriculture and Food Sovereignty, jointly announced the launch of a Plan to regain sovereignty in livestock farming, with the aim of « producing what we consume » (Marc FESNEAU). This plan includes several structural measures aimed at improving the competitiveness of the sectors, increasing farmers' incomes, promoting and enhancing this sector, as well as strengthening the attractiveness of livestock-related professions (Ministry of Agriculture and Food Sovereignty, 2024b).

CNE communication campaign « Our farms, something to be proud of »

This joint communication campaign by CNE, INTERBEV, CNIEL, and ANICAP in favor of French ruminant farming aims to raise awareness among the French about the uniqueness and quality of their ruminant farming model. This collective campaign is being launched on February 5, 2024, in the national and regional daily press as well as on social media, followed by the International Agricultural Show in Paris. It has continued with short television programs throughout 2024 and 2025. Find the campaign on the website <https://elevation-ruminants.fr/>.

France Laitière 2030

The ambition of France Laitière 2030 (franceterredelait.fr) is to maintain the country as a land of sustainable, resilient, and responsible milk production. The France 2030 transformation plan aims to accelerate the evolution of key sectors of our economy through innovation, with the objective of maintaining France as a European and global leader in dairy production. To support innovative players in the regions, the General Secretariat for Investment is setting up numerous funding and counters, available on the franceterredelait.fr website, to provide candidates in the sector with all the necessary visibility.

Sector plans for the French beef, veal, sheep, goat and dairy sectors

At the request of the French President of the Republic in 2017, the inter-professional organizations developed plans for the development and transformation of agricultural and agri-food sectors. These were submitted to the Ministry of Agriculture and Food and are available on its website: #EGalim: sector plans | Ministry of Agriculture and Food Sovereignty.

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