



Liberté • Égalité • Fraternité
RÉPUBLIQUE FRANÇAISE

MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

**AGRICULTURES
PRODUISONS
AUTREMENT**

French approach to supporting competitive supply chains

20 juin 2016

agriculture
gouv.fr
alimentation
gouv.fr





Liberté • Égalité • Fraternité
RÉPUBLIQUE FRANÇAISE

MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

A longstanding general concern

- Since 2008, competitiveness of the industry is a major concern in public policies :
 - Support firms development (especially SMEs)
 - Strengthen relationships between clients and suppliers
 - Improve the global strategy and functioning of each industrial sector on a French, EU and worldwide basis

AGRICULTURES
PRODUISONS
AUTREMENT

agriculture
.gouv.fr
alimentation
.gouv.fr





MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

With specific concerns for the agrifood sector

- Globalisation of the economy including agricultural commodities
- Increasing price volatility of raw material
- Decrease of agrimarkets' regulation
- Mature EU food market : growth through international markets and new outputs (bio-economy)
- Increasing consumers' expectations (quality, transparency, sustainability...)

AGRICULTURES
PRODUISONS
AUTREMENT

agriculture
gouv.fr
alimentation
gouv.fr





MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

With specific concerns for the agrifood sector

- Mutual dependency between agriculture and food industry
- Create value in the food supply chain : cost and non-cost competitiveness
- Share value in the food supply chain : unfair trade practices and retail margins

AGRICULTURES
PRODUISONS
AUTREMENT

agriculture
.gouv.fr
alimentation
.gouv.fr





Liberté • Égalité • Fraternité
RÉPUBLIQUE FRANÇAISE

MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

AGRICULTURES
PRODUISONS
AUTREMENT

High Level Forum and Task Force

- The European Commission decided to keep a specific Forum for a better functioning food supply chain in order to work on :
 - Fair and efficient trading practices
 - Competitiveness and new opportunities
 - Price transparency
- Task Force on agricultural markets working on :
 - Farmers' bargaining position
 - Farmers' access to finance



French approach for adding value to agriculture commodities



Liberté • Égalité • Fraternité
RÉPUBLIQUE FRANÇAISE

MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

AGRICULTURES
PRODUISONS
AUTREMENT

1) Price transparency

2) Improving trading practices

3) Supporting value creation along the agrifood chain : cost and non-cost competitiveness

agriculture
gouv.fr
alimentation
gouv.fr





MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

1) Need to improve knowledge about price transmission

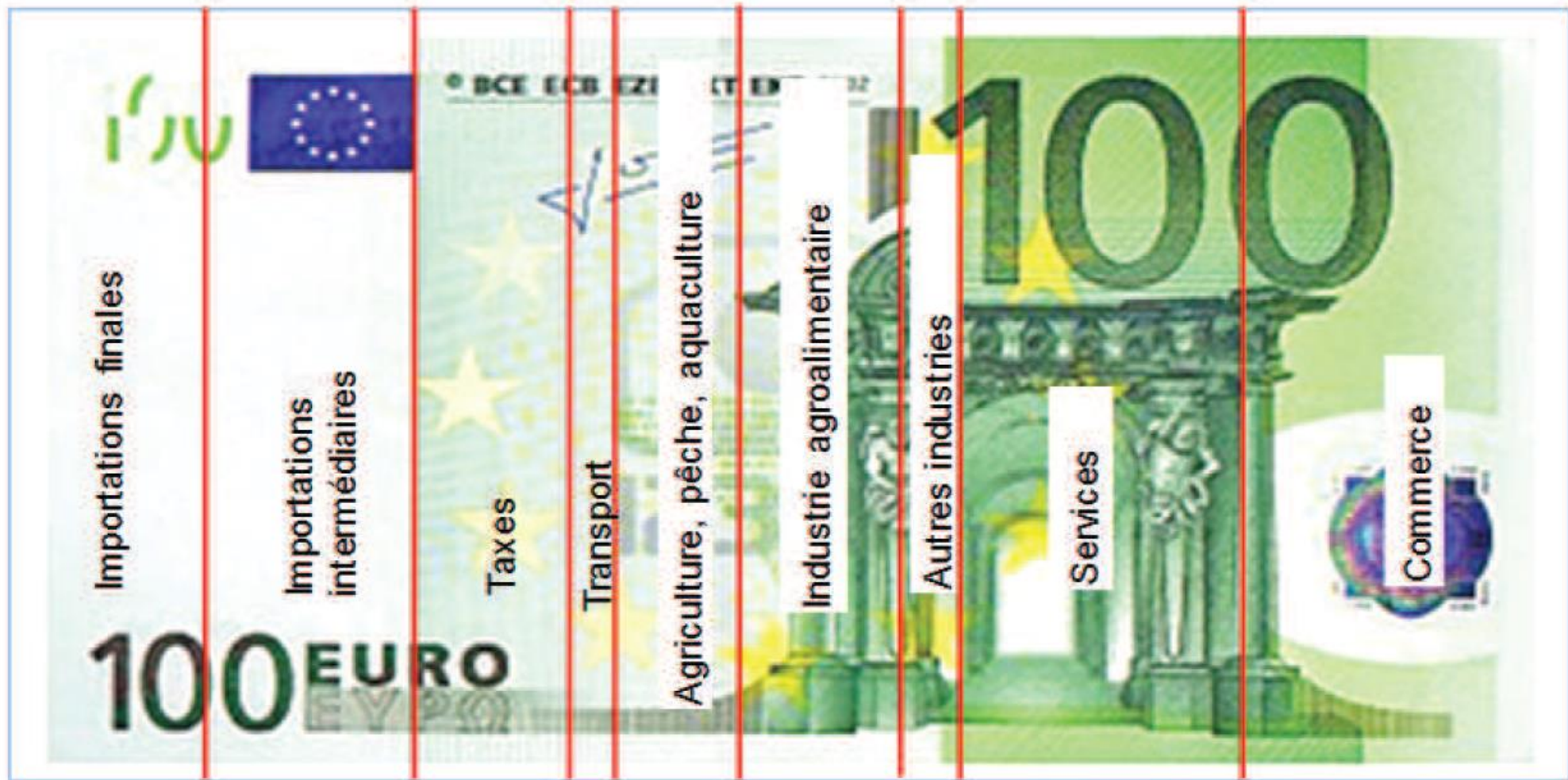
- Need to keep cost indicators and price monitoring at a european level
- Creation of the French Food Sector Price and Margin Surveillance Program at the **end of 2010** (also called « the observatory »)
 - analysing supermarket food sections' accounts
 - developed a macroeconomic decomposition of food demand into added values, imports and taxes : the « food euro »

AGRICULTURES
PRODUISONS
AUTREMENT

agriculture
gouv.fr
alimentation
gouv.fr



Valeur ajoutée : 61,3 €



14,3 €

15,3 €

9,2 €

2,1 €

8,2 €

13,2 €

3,2 €

14,6 €

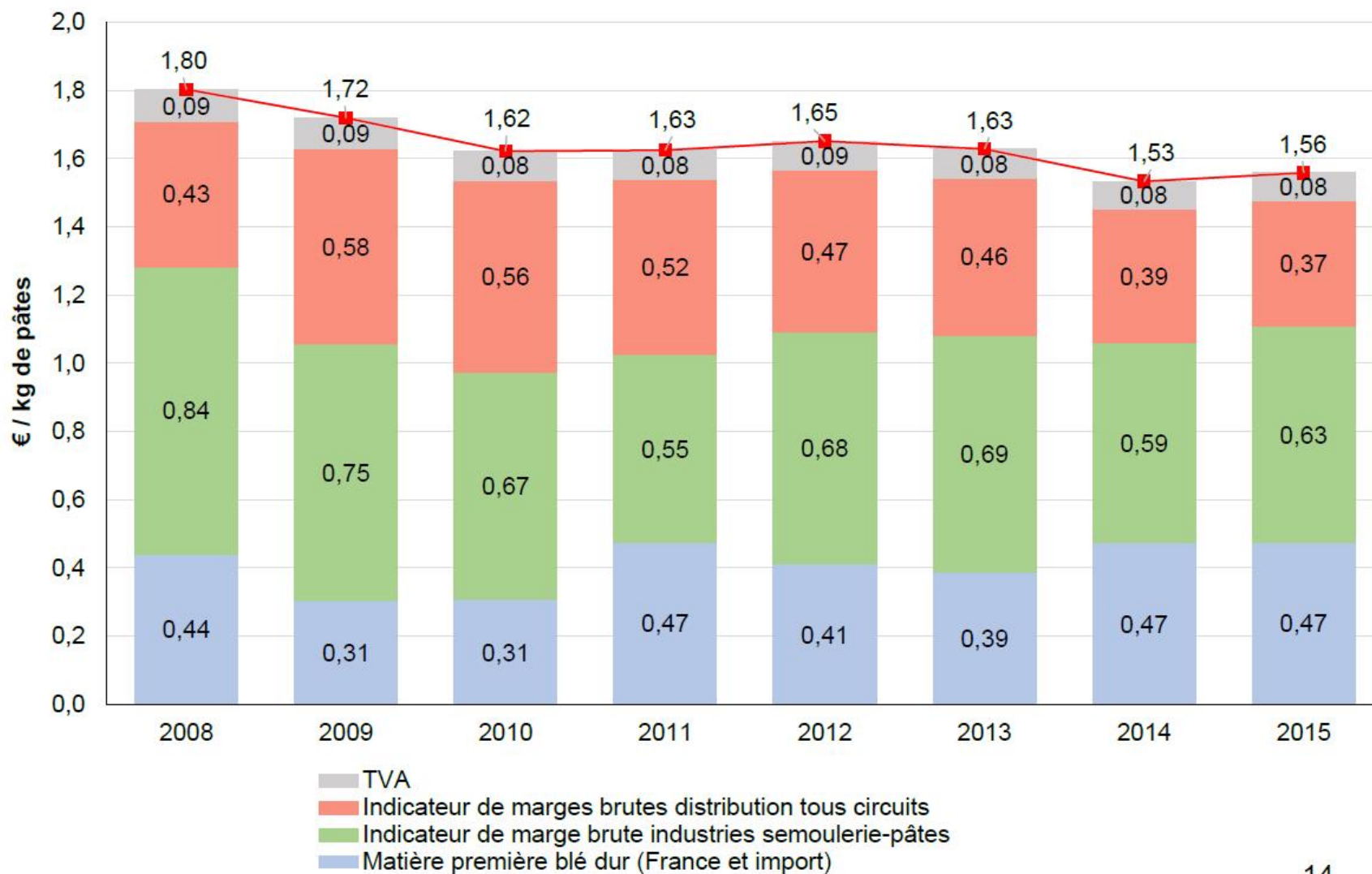
19,8 €





PRIX ET MARGES BRUTES PÂTES

Rapport au
Parlement 2016





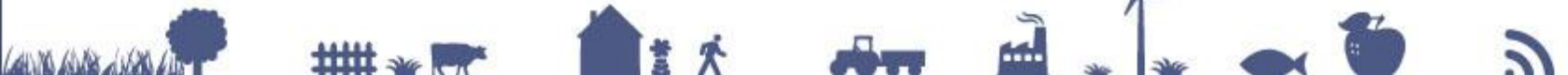
MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

AGRICULTURES
PRODUISONS
AUTREMENT

agriculture
.gouv.fr
alimentation
.gouv.fr

2) Improving trading practices

- Less market regulation in the single CMO (eg, quotas)
- Difficult relationships between food industry and retail as well as between farmers and industry
- Promoting additional tools in France :
 - Sanction law violations
 - Identify and share good and bad practices
 - Develop the use of contracts
 - Develop the use of mediation to deal with conflicts
 - The label « relations fournisseur responsable »





Liberté • Égalité • Fraternité
RÉPUBLIQUE FRANÇAISE

MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

3) Supporting value creation along the agrifood chain

- Cost and non-cost competitiveness

French pact for competitiveness : effect expected on employment cost

Support SMEs in their investment programs and access to financial tools :

- CAP(EFARD) and EFRD implemented by regions
- the national « Invest for the future » program
Investing in higher education and training, research, industry and SMEs, sustainable development and digitalisation.

140M€ recently dedicated for the agrifood sector

AGRICULTURES
PRODUISONS
AUTREMENT

agriculture
gouv.fr
alimentation
gouv.fr





MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

3) Supporting value creation along the agrifood chain

- Innovation :
 - finance and facilitate projects
 - develop a collaborative ecosystem (clusters, Frechtech/Foodtech initiative, bring closer universities and business...)
 - Support initiatives related to new products, new markets (bioeconomy), new organizations
 - Develop the use of ICT in agriculture and the food industry

AGRICULTURES
PRODUISONS
AUTREMENT

agriculture
gouv.fr
alimentation
gouv.fr





MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

3) Supporting value creation along the agrifood chain

- Sustainability and environmental efficiency :
 - It is a strategic expectation for PFPs' clients driven by consumers' expectations.
 - PFPs have the ability to influence farmers practices
 - Encouraging sustainable sourcing and process
 - Reduce energy and water consumption
 - Develop CSR policies
 - Promoting specific approaches as opportunities
 - Bio products, high environmental value...
 - Involving operators in new collective strategies

AGRICULTURES
PRODUISONS
AUTREMENT

agriculture
gouv.fr
alimentation
gouv.fr





MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

3) Supporting value creation along the agrifood chain

AGRICULTURES
PRODUISONS
AUTREMENT.

Internationalisation and export :

- Supporting SME's in their access to new markets
- Increasing attention to international trade negotiations (customs duty, preferential access...)
- Involving operators in collective initiatives





Liberté • Égalité • Fraternité
RÉPUBLIQUE FRANÇAISE

MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

Encouraging collective initiatives

France encourage partnerships :

- Between peers :
 - For promotion and access to foreign markets
 - For leadership on specific food markets, such as yeasts and leavens or proteins
- Among actors
 - For local food path
 - contracts from producer to retailer

AGRICULTURES
PRODUISONS
AUTREMENT

agriculture
gouv.fr
alimentation
gouv.fr





Liberté • Égalité • Fraternité
RÉPUBLIQUE FRANÇAISE

MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

French proposal for the futur CAP

3 priorities :

- competitiveness : strengthening the tools for innovation and investment
- Sustainability : promoting virtuous supply chain
- Resilience : tools to face economic, climate and sanitary risks

AGRICULTURES
PRODUISONS
AUTREMENT

agriculture
gouv.fr
alimentation
gouv.fr





Liberté • Égalité • Fraternité
RÉPUBLIQUE FRANÇAISE

MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

AGRICULTURES
PRODUISONS
AUTREMENT

Thank you !

agriculture
.gouv.fr
alimentation
.gouv.fr

