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Making a success of the food transition: the contribution of the TRAMe2035 scenario

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The way we eat today is contributing to health, social and environmental problems, making a shift in eating habits essential. While the goals of this food transition are increasingly clear, the feasibility and conditions for its implementation are less well studied and remain the subject of debate, particularly given the political and social sensitivity of these issues. With this in mind, IDDRI and I4CE have drawn up the TRAMe2035 scenario (*Transition des Régimes Alimentaires des Ménages à l'horizon 2035* – Transition of Household Dietary Trends by 2035) for France. But what are its methodological foundations and key findings?

While [TRAMe2035](#) places particular emphasis on meat consumption, which is both a key factor in environmental challenges and a topic of controversy, this scenario is part of a [broader foresight exercise exploring the upstream and downstream transformation of the French meat sector](#), which is on a challenging trajectory ([IDDRI, 2024](#)), with a growing risk of imbalance between supply and demand. To better align French consumption with domestic production, TRAMe2035 ([IDDRI, 2025](#)) presents an alternative vision for food consumption. Future supply scenarios will complement this work, offering insights into how the meat industry can transition towards “less is better”.

What model for change?

Some argue that food consumption is fixed and beyond our control, despite scientific evidence showing that it is shaped by multiple factors. TRAMe takes the opposite view, drawing on the concept of the “food environment”. This represents the context that influences what we eat, i.e. the physical environment (what products are available, what food options are provided), the economic environment (the prices of food products and services), the cognitive environment (the information provided), and the socio-cultural environment (the messages and values that shape eating habits).

This interpretive key helps explain the current situation and how the transition can be carried out. Taking the example of meat: statistically, consumption is stagnating, despite a significant share of the population declaring a desire to eat less. This gap between intentions and actual practices can be easily explained using the food environment approach: changing eating habits is difficult when the surrounding conditions remain the same. Rather than focusing solely or primarily on individual choices, TRAMe2025 simulates actions that reshape food environments, making certain practices easier and more attractive. These actions are perceived and adopted differently across social groups, which the scenario takes into account by identifying a variety of transition pathways, adapted to different constraints and expectations.

What results?

The development of TRAMe2025 consisted of three stages: 1) a quantitative and qualitative description of dietary practices across 12 social groups; 2) the use of an innovative methodology to simulate, in 12 social narratives, how these groups might adapt in response to changes in the food environment; and 3) a quantitative assessment of the resulting consumption patterns by 2035. This foresight work led to three main findings.

1) A transition can be triggered by 2035, while respecting social diversity

Each group follows its own transition pathway, i.e. a pathway shaped by its own specific constraints and aspirations. The trajectories of the 12 groups are categorized into four main trajectory types, each representing a configuration for considering the transition. Changes in food environments play distinct roles in each of these models, as illustrated in the figure below.[1](#)

Expanding possibilities. These groups face significant economic constraints, which sometimes make food feel like a source of deprivation. They are not particularly receptive to environmental messages, but do have concerns about food (e.g. natural qualities, supporting local producers). The easing of financial constraints, changes in the food options available in the places they frequent (institutional catering, food aid programmes, food services for senior citizens), exposure to messages from the health and education sectors, and the influence of their children or grandchildren, will all play a key role in shaping their trajectory.

Affirmation. These groups are defined by a positive attitude towards sustainable food and a moderate level of constraint. For them, food is a space where they seek and exercise a sense of autonomy. Health, animal welfare and

the environment are key motivations. Their trajectory will be supported by the increasing availability of sustainable food options, shifting norms within their peer groups, and the influence of the consumption behaviours of more affluent groups.

Taking the first steps. These groups face a moderate level of constraint and tend to have a negative perception of “eco-gestures”. Meat plays a central role in their diet, driven by convenience, habit, tradition, and enjoyment. Their trajectory is shaped by gradual familiarization with practices that are becoming the norm, influenced by the role of women or children, guidance from key figures (doctors, sports influencers, TV), and the normalization of plant-based options in the places where they shop. Factors such as local sourcing, proximity, gastronomy and animal welfare are also driving change.

Aligning actions. These groups face few constraints and have a positive attitude towards sustainable food. They adhere to the logic of “small gestures” out of conviction and a desire for social distinction. The evolution of the food offer, the rise of consumption trends and narratives that connect vegetarianism with “eating well” and gastronomy, and the spread of information on the impact of a meat-based diet (through labels or civil society campaigns) help these attitudes translate into action.

In quantitative terms, this results in varying degrees of decline in meat consumption between 2023 and 2035. At the same time, shifts towards “better” are evident in several group trajectories (e.g. meat from grassland-based systems, locally sourced meat, French-origin products, certified labels, etc.).

2) A milestone towards environmental and health objectives

This trajectory to 2035 establishes the foundations for achieving meat consumption reduction targets in the scenarios designed to achieve environmental objectives for agriculture by 2050. It is consistent with the targets of the nutritional recommendations of several European countries, which incorporate both health and environmental considerations.

Reaching these targets by 2050 will, however, require further expansion and deepening of the changes simulated by TRAMe2035. This aligns with the idea that shifts in food environments and practices have cumulative effects over time, reinforcing one another, both at the household level (e.g. evolving social norms) and among food system stakeholders (e.g. shifts in business strategies, etc.).

3) Action on food environments: a subject for debate

TRAMe2035 also outlines what a coherent, ambitious and achievable approach to transforming food environments could look like. Existing public policies, along with numerous initiatives from businesses and associations, provide a strong foundation for discussing a short-term action plan. The TRAMe2035 scenario is based on tried and tested changes in all aspects of the food environment, without imposing restrictions on consumer choice.

Here are some of the key developments incorporated into TRAMe2035 that warrant further debate:

- **Physical availability**, which involves changes in food retail (shelf reorganization, new products and shifts in brand marketing), in institutional and commercial catering (plant-based menu options, new catering concepts, etc.), as well as a reconfiguration of the food offer (e.g. new products from the agri-food industry).
- **Socio-cultural and informational aspects**, with TRAMe2035 focusing on labels, broadcast and digital media, brand communication and the role of opinion leaders (such as medical professionals and influencers), which support both plant-based products and high-quality meat.
- **Economic measures**, including the expansion of promotional offers on plant-based products, a reduction in the price gap between plant-based alternatives and meat, and a (moderate) increase in minimum social benefits.

These various levers represent measures that public authorities could adopt to take effective action in support of healthy, sustainable food for all. The National Food, Nutrition and Climate Strategy (SNANC – *Stratégie Nationale pour l’Alimentation, la Nutrition et le Climat*), expected in the coming months, along with the next iteration of the National Nutrition and Health Plan (PNNS – *Programme National Nutrition Santé*), will be key milestones in tracking progress in this direction.

By considering the diversity of social groups and the factors influencing food environments, TRAMe2035 presents itself as a credible scenario. It is not, however, the only possible approach nor an ideal scenario—other combinations of changes in food environments could also be envisioned. This report is intended to spark discussion on these possibilities.

1

By “predispositions”, we refer to the informational, social and cultural factors that shape a group's positive attitude towards the key aspects of sustainable food consumption (such as foods from sustainable production methods or eating less meat). However, these predispositions do not necessarily translate into action.

AGRICULTURE ET ALIMENTATION

FOOD SYSTEM

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