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Future pathways for the meat sector in France

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There is broad recognition that the French meat sector's current trajectory is a dead end, leading to socio-economic vulnerability in the face of international competition and offering only limited environmental gains. This raises two key questions: (1) What alternative pathways are feasible, and (2) how might the sector shift away from the current business-as-usual scenario, whichever option is ultimately chosen? These questions will be central to the formulation of the European Commission's livestock strategy in 2026.

Consensus on the deadlock, no agreement on the way ahead

Faced with multiple challenges confronting the meat sector in France (maintaining food production capacity, ensuring environmental sustainability, and preserving rural employment and economic performance), there is broad

agreement that continuing along current trends cannot constitute a just transition pathway for this sector ([IDDRI, 2024](#)).

Environmentally, the business-as-usual scenario offers little prospect of more than marginal gains, driven largely by expected technical progress between now and 2035 and by the ongoing decline in cattle and pig herds. In socio-economic terms, in the absence of major shifts, the competitiveness of French producers would continue to weaken in the face of intensifying competition from European and, to a lesser extent, non-European competitors, as meat becomes an increasingly standardized and commoditized product. Such a trajectory would lock French actors into a struggle for survival, characterized by the erosion of the agricultural workforce, livestock farms and processing facilities, rather than enabling a genuine transition dynamic.

Four scenarios reflecting different priorities for the future of livestock farming

There is, however, no shared vision of alternative pathways that should be considered. For this reason, IDDRI, in a new *Study* (IDDRI, 2025a), sets out four contrasting scenarios for the evolution of the French meat sector by 2035, analyzed using a multi-criteria approach. Drawing on modelling tools capable of linking the different components of the agricultural system in a coherent way, the *Study* provides a comparative assessment of the strengths and limitations of each trajectory. Alongside the business-as-usual scenario, the report identifies three further scenarios for the future of meat production in France, each reflecting different priorities for tomorrow's livestock sector.

The **Efficiency First** scenario focuses on improving feed conversion ratios and adopting technologies that reduce emissions. It is grounded in economies of scale, specialization and increased territorial concentration, with the aim of making production more efficient while controlling its environmental impacts.

The **Feed no Food** scenario seeks to minimize competition between animal feed and human food, while maximizing the ecosystem services provided by livestock. It leads to territorial de-specialization, more moderate production levels and more diversified livestock farming systems.

The **Rural Renaissance** scenario frames the livestock sector as a driver of regional economic development. It combines long and short supply chains and promotes the coexistence of standardized systems—pursuing specialization, regional concentration and expansion, while gaining in efficiency—with diversified systems that also integrate activities unrelated to livestock farming.

These four scenarios are compared against three possible demand trajectories: a business-as-usual consumption level ([IDDRI, 2024](#)) and two more moderate consumption levels, characterized in the TRAMe ([IDDRI, 2025b](#)) and TYFA (to 2035) ([IDDRI, 2018](#)) scenarios. This comparison makes it possible to assess, for each scenario, the capacity of domestic production to meet domestic demand, as well as the environmental implications of each supply–demand configuration.

Breaking from the business-as-usual scenario: no easy options

The results show that no single scenario fully addresses all economic, social and environmental objectives. The Efficiency First scenario performs very well in reducing greenhouse gases (GHG) emissions, but at the expense of other environmental indicators. It delivers the highest supply rate for a given level of demand but leads to a significant reduction in employment.

The Feed no Food scenario performs strongly across multiple environmental criteria, including emissions reduction, biodiversity preservation, farm autonomy and limited soil and water pollution. However, it entails a substantial fall in production.

The Rural Renaissance scenario has mixed environmental effects, broadly similar to those of the business-as-usual scenario, but stands out for its positive impacts on agricultural demographics and industrial workforce.

These scenarios are also highly sensitive to assumptions about changes in consumption. Under business-as-usual consumption, the meat sector as a whole cannot follow a pathway compatible with the emission reduction objectives of the National Low-Carbon Strategy 3 (SNBC 3). By contrast, the most moderate meat consumption patterns consistently deliver the best outcomes in terms of the overall GHG balance (including imported emissions) and supply rates.

Therefore, regardless of the path chosen, any scenario involves trade-offs between different issues and must therefore be subject to political choices and decisions.

Conditions for transitioning beyond the business-as-usual scenario

The implementation of the three scenarios other than the business-as-usual scenario has one common requirement: a profound change in both the competitive environment in which the French meat sector operates and in the policy instruments that support livestock farming or investment dynamics in the sector.

However, calls for additional public funding sit uneasily with the context of budgetary restraint at both French and EU levels. This is particularly true given that the French meat industry already receives substantial support, estimated at around €6 billion in direct subsidies (I4CE, based on RICA and ESANE data).

Furthermore, offering greater protection from competition goes against the nature of this market. First, the sector depends on both imports (for example, soya used for French poultry feed) and exports (for example, to help provide opportunities for pork carcass parts that are not sufficiently valued in the domestic market). Second, since its main competitors operate within the European single market, the issue is less one of protecting French operators than of ensuring market conditions that allow them to capitalize on the strengths of high-quality production.

There is a clear need to initiate a Europe-wide discussion on the political and economic framework required to enable the meat sector to pursue a model that is both prosperous and sustainable, at least on its domestic market. This will involve establishing appropriate financing mechanisms and developing a common strategy to limit opportunistic behaviour within the domestic market. The “livestock” strategy announced by the European Commission for 2026 could provide a valuable opportunity in this respect.