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# CAP : the challenges ahead

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- **Overview of agriculture and food industries in France**
- The CAP 2014-2020 in France
- French position for the future CAP





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# Some figures about French agriculture

**France : largest agricultural country in the EU :**  
**19% of european production**

- **Economic role : € 75 billion** turnover for agriculture (2015), around **€ 125 billion** for food industries, **€ 9,3 billion** trade surplus (**€ 60,1 billion** export / **€ 50,8 billion** import).
- **3,6% of French GDP** in 2015 (agriculture + food industries)
- **Social role : 1 French out of 4** lives in rural areas, **1 420 000 jobs** in agriculture, forestry, fisheries and food industries
- **Territorial role : 54 %** of French territory dedicated to agriculture + **28 %** for forests = **82 %**





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# A diversified agriculture

**Total area : 551.500 km<sup>2</sup>, 54% agricultural land  
18,3 million ha arable land**

**- N° 1 in the EU (2015):**

**cereals (73 Mt)**

**cattle (19,4 million heads),**

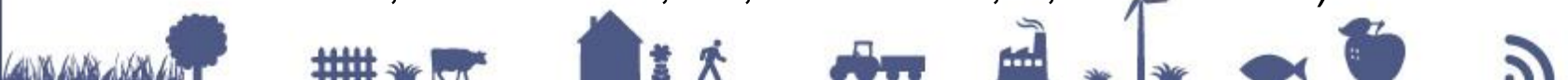
**beets (33,5 Mt), oilseeds (6,9 Mt seeds)**

**sugar**

**- n° 2 in the EU :**

**dairy products (L 25,4 billion milk collection in 2015)**

**- n° 2 for wine in the world : (47,8 million hL, essentially under  
GI schemes : 22,3 Mhl PDO ; 13,5 Mhl PGI ; 2,6 Mhl no GI)**



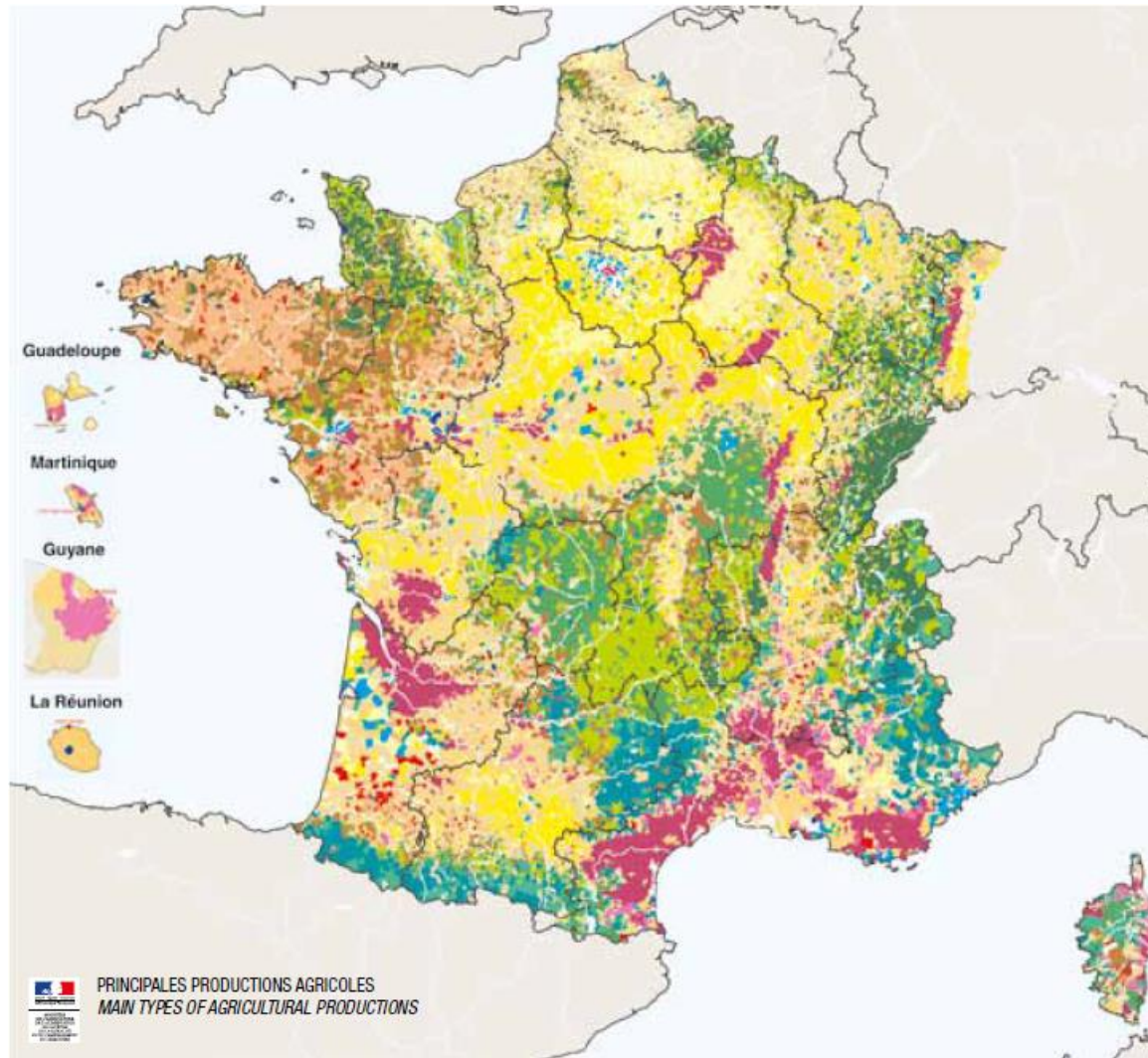




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# A diversified agriculture



- Sans exploitation / Not farmed
- Céréales et oléoprotéagineux / Cereals, oilseeds and protein crops
- Autres grandes cultures / Other major field crops
- Légumes et champignons / Vegetables and mushrooms
- Fleurs et horticulture diverse / Flowers and sundry horticulture
- Viticulture / Winegrowing
- Fruits et autres cultures permanentes / Fruit and other permanent crops

- Bovins lait / Dairy cattle
- Bovins viande / Meat cattle
- Bovins mixtes / Dairy/meat cattle
- Ovins, caprins / Sheep, goats
- Polyélevage d'herbivores / Mixed grazing livestock
- Porcins / Pigs
- Aviculture / Poultry farming

- Autre polyélevage / Other mixed livestock
- Polyculture dominante / Mixed crops predominant
- Polyélevage dominant / Mixed livestock farming predominant
- Exploitations non classées / Mixed crops and livestock
- Polyculture et polyélevage / Uncategorised farming





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# A competitive agriculture based on family farming

- Around **1 million people** working in agriculture.
  - **475 000 farms**, most of them run by families (long term investment approach, sustainable projets).
  - **Average farm size : 62 ha (22 % > 100 ha ; 30 % < 10 ha).**
  - **Average of 1,5 people working on the farm => multiple skills** (zootechnics, phytotechnics, investment and account management,...) ; technological innovation
- => Needs in matter of training - specialized / continuing : mandatory diploma requirements** for young people taking up farming.
- **34 %** of farmers got a degree (**75%** of farmers under 40).
  - **Training + gradual specialisation** => increase of productive efficiency (+ 3,2 %/year between 2000 and 2010)



# Dynamic food industries

- **3rd industrial sector in France** in matter of turnover (2015), second in matter of jobs
- **17 600 food companies** (including 2 700 employing more than 20 people)
- **€ 171 billion turnover, 25% export (2014)**
- **418 000 employees (2014)**
- **15% of total French Industry**
- **Major assets : highly diversified, high standards of production, « French quality » renowned worldwide, strong focus on innovation**







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# The CAP 2014-2020 in France

- 3 main priorities for France set in the agricultural law (Loi d'avenir, 2014)
  - new farmers settlement ;
  - breeding ;
  - triple performance (economic, social, environmental).
- CAP budget : 9,3 billion per year for 2014-2020 (1,6 dedicated for the second pillar).
- Direct paiements in France
  - 30 % for greening ;
  - 5 % for redistributive payment (52 first hectares) ;
  - 1 % for young farmers ;
  - 15 % for coupled support (80 % for breeding);
  - 49 % for basic payment scheme.



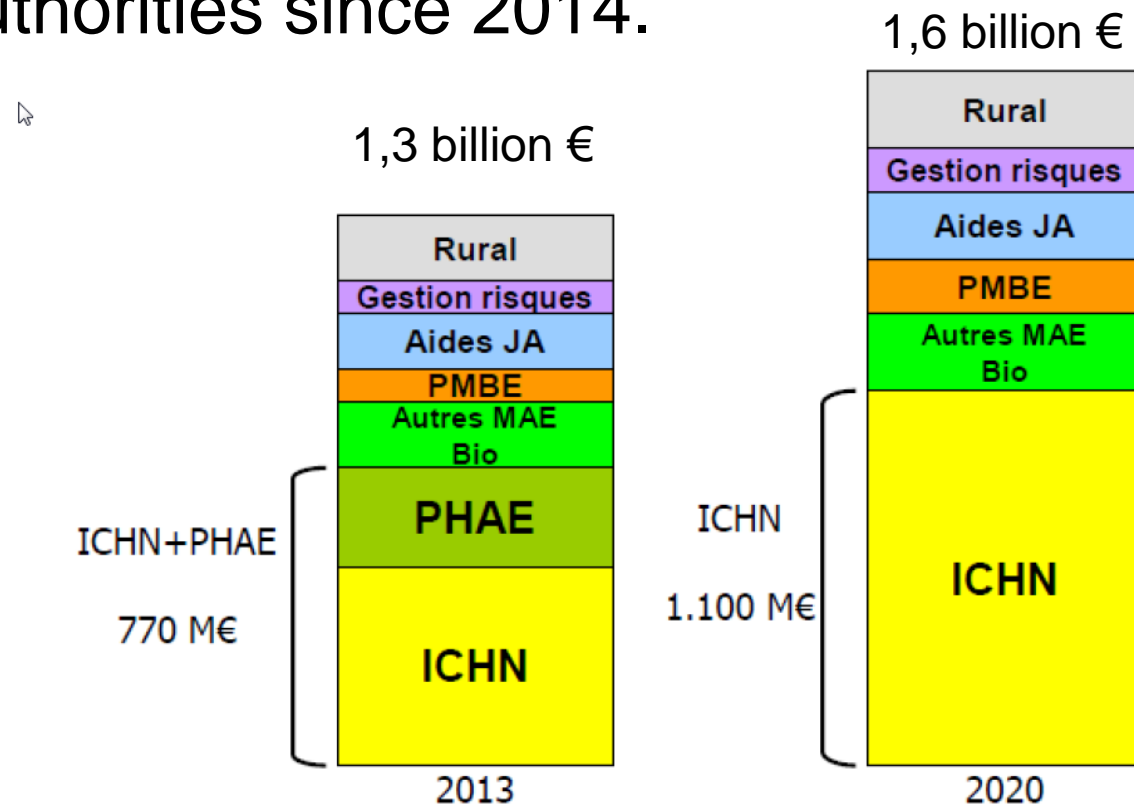


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# The CAP 2014-2020 in France

- Rural development supports : 1 national framework and 27 RDP, regions are managing authorities since 2014.





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# The CAP 2014-2020 in France

## Outcome of the CAP 2014-2020

- Greening : a first step towards an environmental-friendly CAP but few results on farming practices.
- Resilience : several tools available to manage risks but still big crisis with major impacts on farms.
- Competitiveness : average farmers' income very low.
- Need for simplification.







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# French position for the future CAP

- Since 2014 : launch of the work to define French position for the post 2020 CAP (review of the previous reform, brainstorming about French priorities contribution of research, benchmarking, etc.)
  - Amsterdam Council/ Chambord meeting (may and septembre 2016) : French contribution for the future CAP
  - June 2017 : French answer to the public consultation
- **A REFORMED CAP FOR COMPETITIVE, SUSTAINABLE AND RESILIENT AGRICULTURE**





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# French position for the future CAP

**European agriculture is faced with a series of important issues:**

- **Food security**
  - **Economic issue**
  - **Employment issue**
  - **Environmental issue**
  - **Territorial issue**
  - **An issue of resilience**
- **the response must be European in scope while taking local particularities into account**
- **3 axis to pursue objectives of competitiveness, durability and resilience**
- **necessity of simplification**





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# French position for the future CAP

## **Axis 1: growth, jobs and competitiveness in European supply chains (agricultural, food and non-food)**

- **Importance of decoupled payments to allow farmers to meet the high standards of the EU;**
  - **Maintaining coupled support with more flexibility;**
  - **Fostering innovation and investment;**
  - **Strengthening farmers position in the food supply chain and deepening organization of agricultural sectors.**
- **contribution of the “Etats généraux de l'alimentation”**
- **CMO revision in the omnibus regulation**







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# Etats généraux de l'alimentation

- Workshops about agriculture and food launched by the President of the Republic in July 2017.
- Participants : farmers, processors, retailers and many stakeholders of the civil society (NGO, consumer associations, researchers, etc.).
- 2 projects :
  - creating and sharing value ;
  - healthy, sustainable, reliable food, accessible to all.
- Public consultation from July, 20th to the end of october, 14 workshops until the end of november → Common agenda with solutions.





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# French position for the future CAP

**Axis 2 : environmental public goods and the development of the territories, especially those with natural handicaps**

- **Greening must remain as a first level of environmental requirements → simplification, greater level of ambition (4<sup>th</sup> criterion about soil coverage), better link to amenities;**
- **AECM and organic farming must be strengthened as voluntary measures with a recognition of risk taking;**
- **LFA support must be reinforced to help a balanced development of territories.**





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# French position for the future CAP

## **Axis 3: resilience in coping with sanitary, climatic and economic hazards**

- **the safety net (exceptional measures) and market regulation tools must be retained for crisis with broad effects;**
- **existing schemes (crop insurance, sanitary mutual funds and income stabilisation tool) must be reinforced for medium risks;**
- **low risks could be managed at farm's level with a precautionary saving.**

