

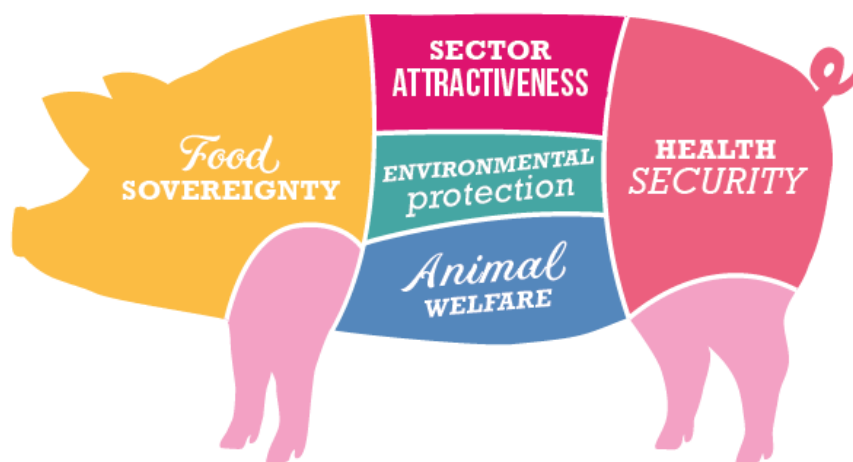
## French Interprofessional Pork Council:

INAPORC was created in December 2003 to bring together and at the same time represent the organisations of the professionals in the French pork sector: animal feed, production, slaughtering-cutting, processing and distribution.



## Tasks:

- Organising inter-professional discussion
- Contributing to the management and development of domestic and export markets
- Strengthening food safety particularly through traceability, research in the interest of both users and consumers
- Defending and promoting the common interests of the sector.





# Statistics 2023



*INAPORC – FRENCH INTERPROFESSIONAL PORK COUNCIL*

*IFIP – FRENCH PIG PRODUCTION INSTITUTE*

## INTERNATIONAL PIG TRADE

5

## THE PORK SECTOR IN FRANCE

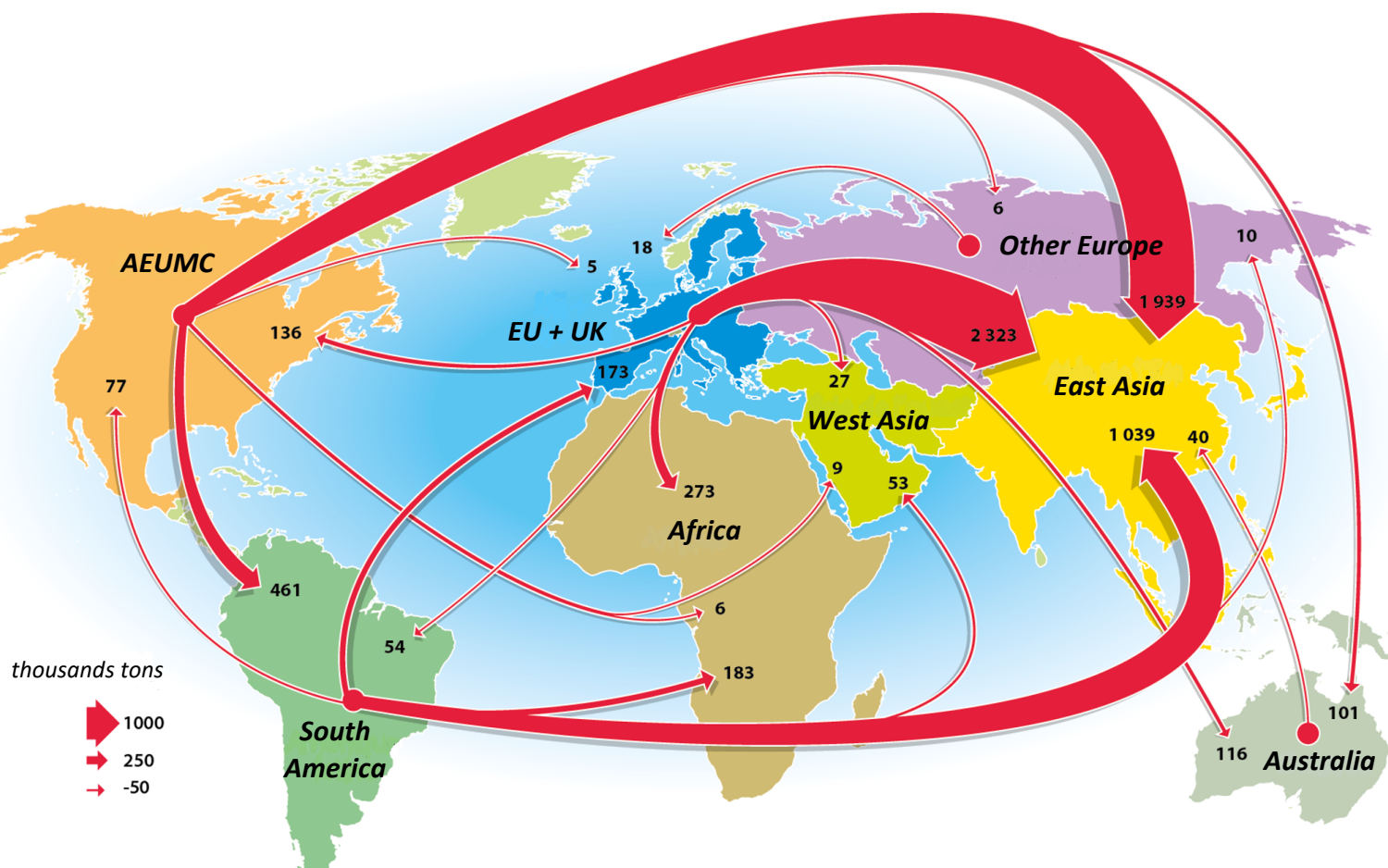
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# International pig trade

## FLOWS OF PORK MEAT AND PRODUCTS WORLDWIDE IN 2023



## LIVESTOCK AND MEAT PRODUCTION (2022)

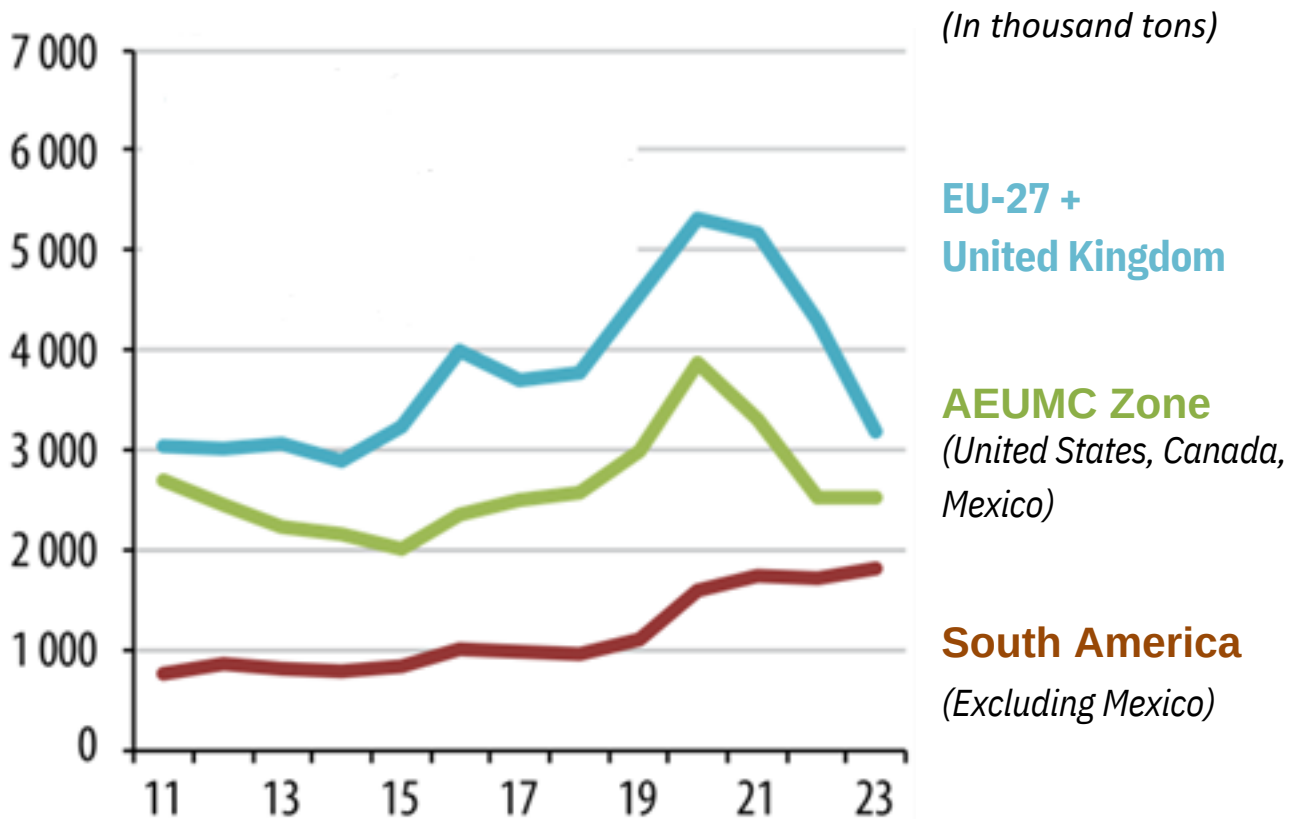
|                           | Livestock<br>Head | Production<br>Tons |
|---------------------------|-------------------|--------------------|
| <b>World total</b>        | <b>979</b>        | <b>110,7</b>       |
| Asia                      | 557               | 59,1               |
| Europe                    | 180               | 29,6               |
| América (North & Central) | 113               | 15,9               |
| South America             | 75                | 6,2                |
| Africa                    | 45                | 2,1                |
| Océania                   | 6                 | 0,6                |

Source : IFIP d'après FAO, USDA, Eurostat



# Global trade

## THE LEADING EXPORTERS OF MEAT PRODUCTS



## THE LEADING IMPORTERS OF MEAT PRODUCTS

(In thousand tons)

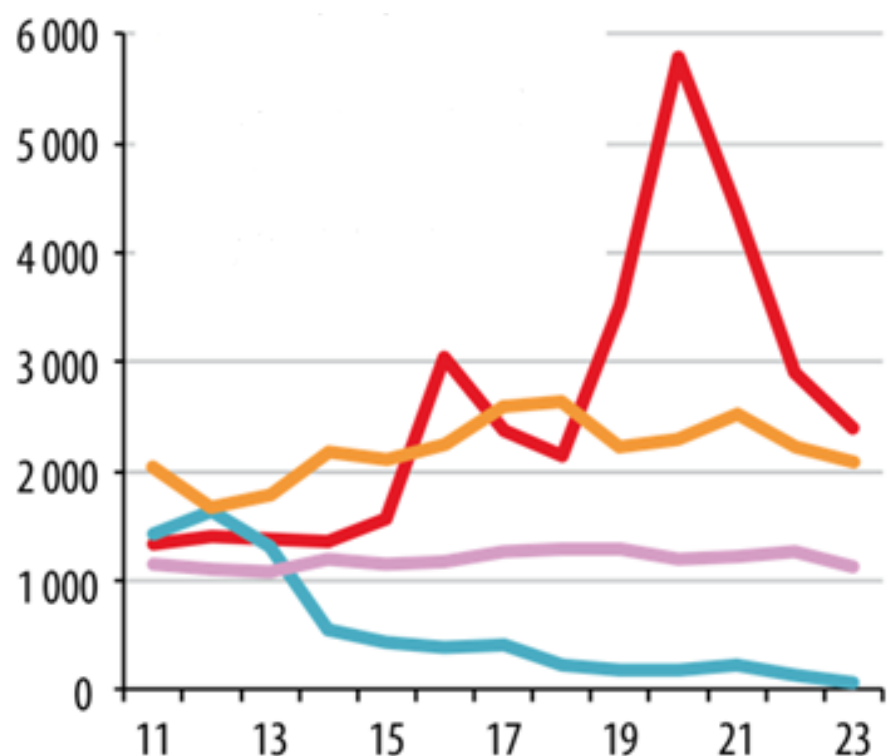
**China**

**Other East Asia**

**Japan**

**Russia + Ukraine + Belarus**

**Russia + Ukraine + Belarus**

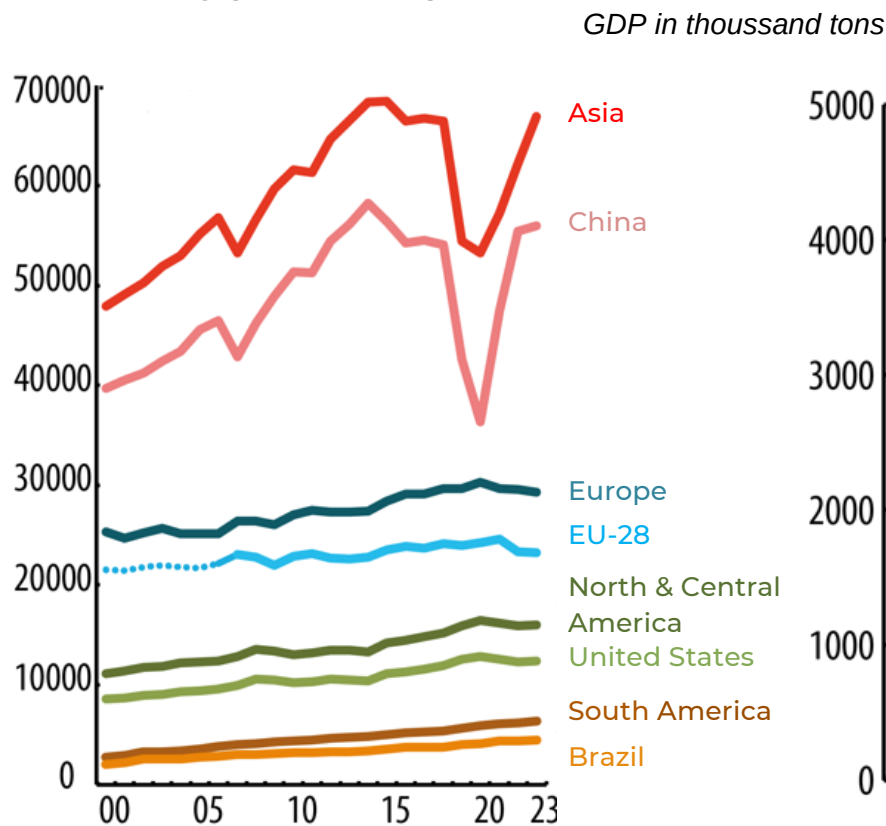


Source : IFIP d'après douanes (Eurostat, TDM)

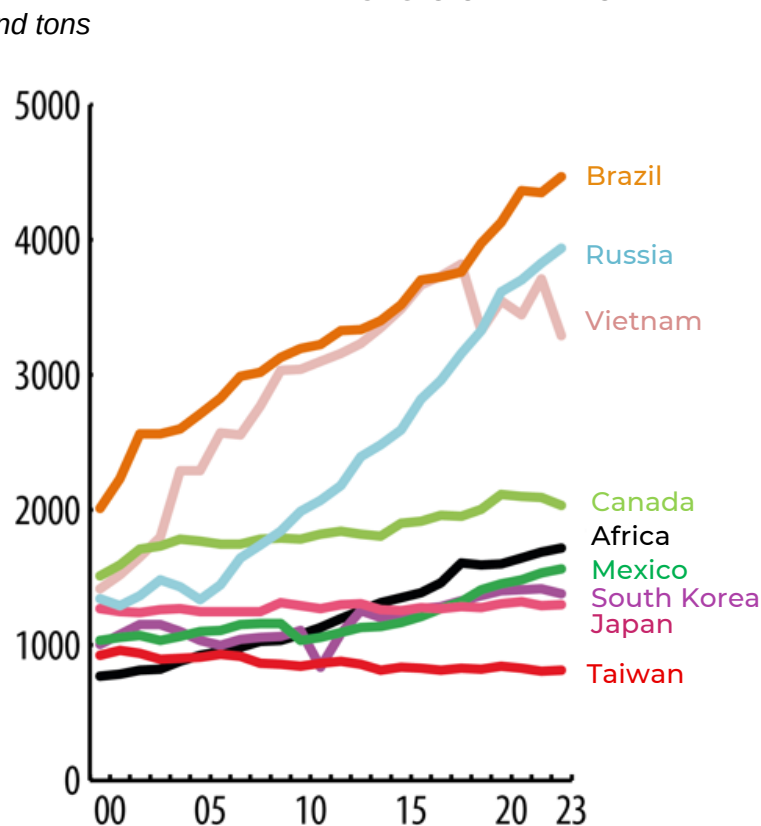


# Pork output development

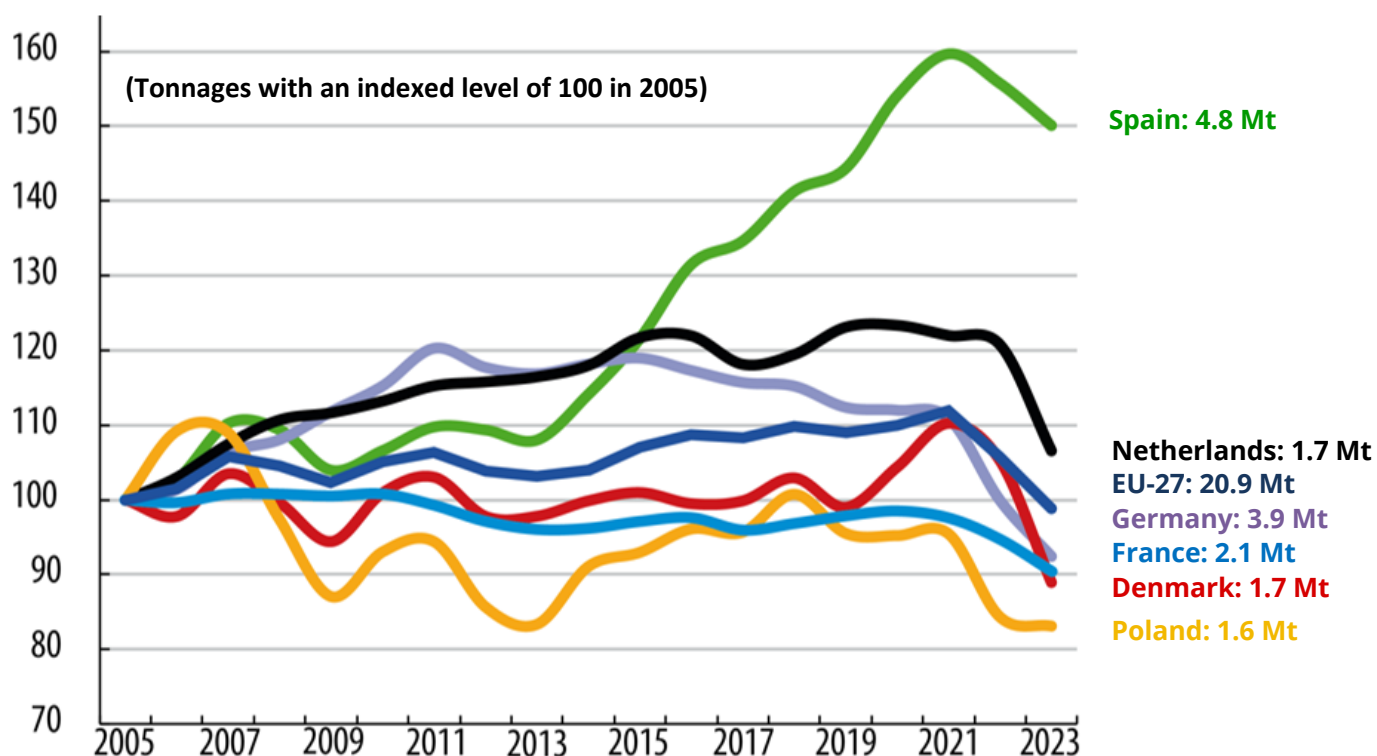
## BY CONTINENTS



## BY LEADING COUNTRIES



## PORK OUTPUT DEVELOPMENTS IN THE LEADING EU COUNTRIES



Source : IFIP d'après Eurostat et douanes

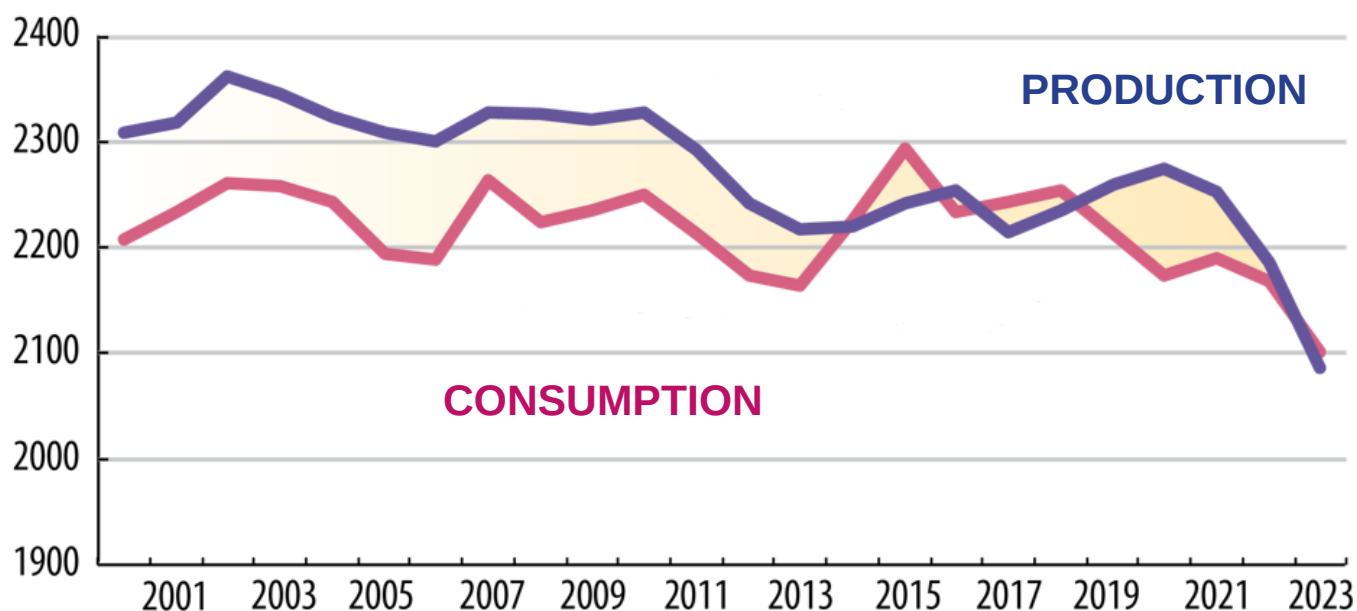


# Production and consumption

## DEVELOPMENT OF PRODUCTION AND CONSUMPTION

1,000 tons of carcass weight equivalent/year

(Gross domestic data)



## DEVELOPMENT OF THE PORK BALANCE SHEET

| 1,000 tons of carcass weight equivalent | 2020   | 2021   | 2022   | 2023         | 2023/2022 (%) |
|-----------------------------------------|--------|--------|--------|--------------|---------------|
| Production (GDP) (1)                    | 2 274  | 2 252  | 2 185  | <b>2 086</b> | - 4,5         |
| Imports                                 | 588    | 622    | 618    | <b>597</b>   | - 3,4         |
| Exports                                 | 689    | 684    | 636    | <b>582</b>   | - 8,4         |
| Consumption (GDC) (1)                   | 2 173  | 2 190  | 2 168  | <b>2 101</b> | - 3,1         |
| Trade balance                           | 101    | 62     | 18     | <b>-15</b>   | - 184,2       |
| Self supply                             | 104,7% | 102,8% | 100,8% | <b>99,3%</b> | - 1,8 point   |
| Consumption per capita (kg/per head)    | 32,3   | 32,3   | 31,9   | <b>30,8</b>  | - 3,5         |

(1) GDP: Gross Domestic Product.

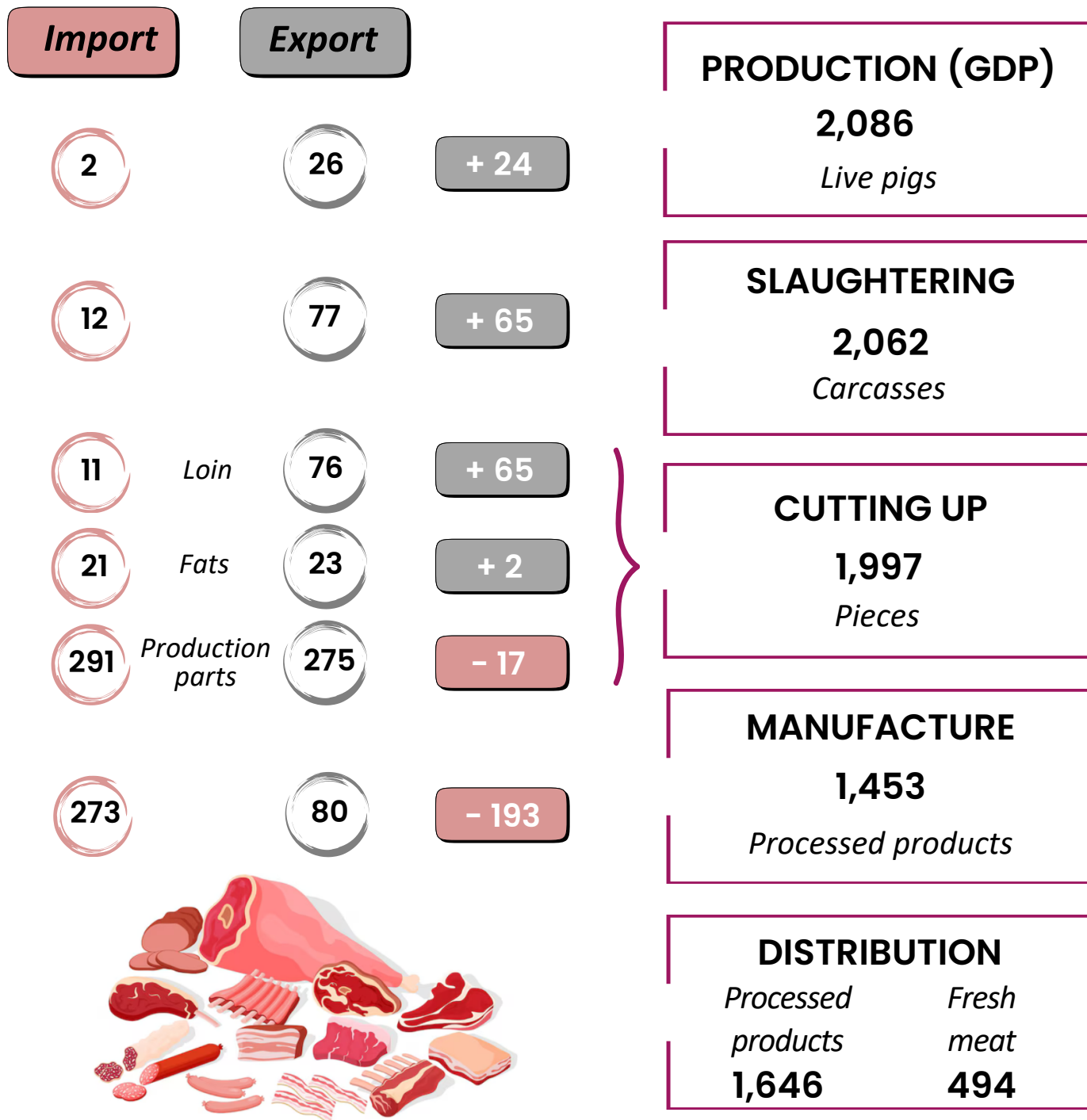
GDC: Gross Domestic Consumption, including own consumption Metropolitan France + overseas departments, carcasses with head but without fat, kidneys or diaphragm

Source : IFIP d'après SSP-AGRESTE, Eurostat, douanes, estimations IFIP)



# Links within the sector 2023

1,000 tons of carcass weight equivalent (1)



(1) Figures in 1,000 tons  
Mainland France + overseas  
departments, carcasses with head but  
without fat, kidneys or diaphragm.  
On – farm consumption included

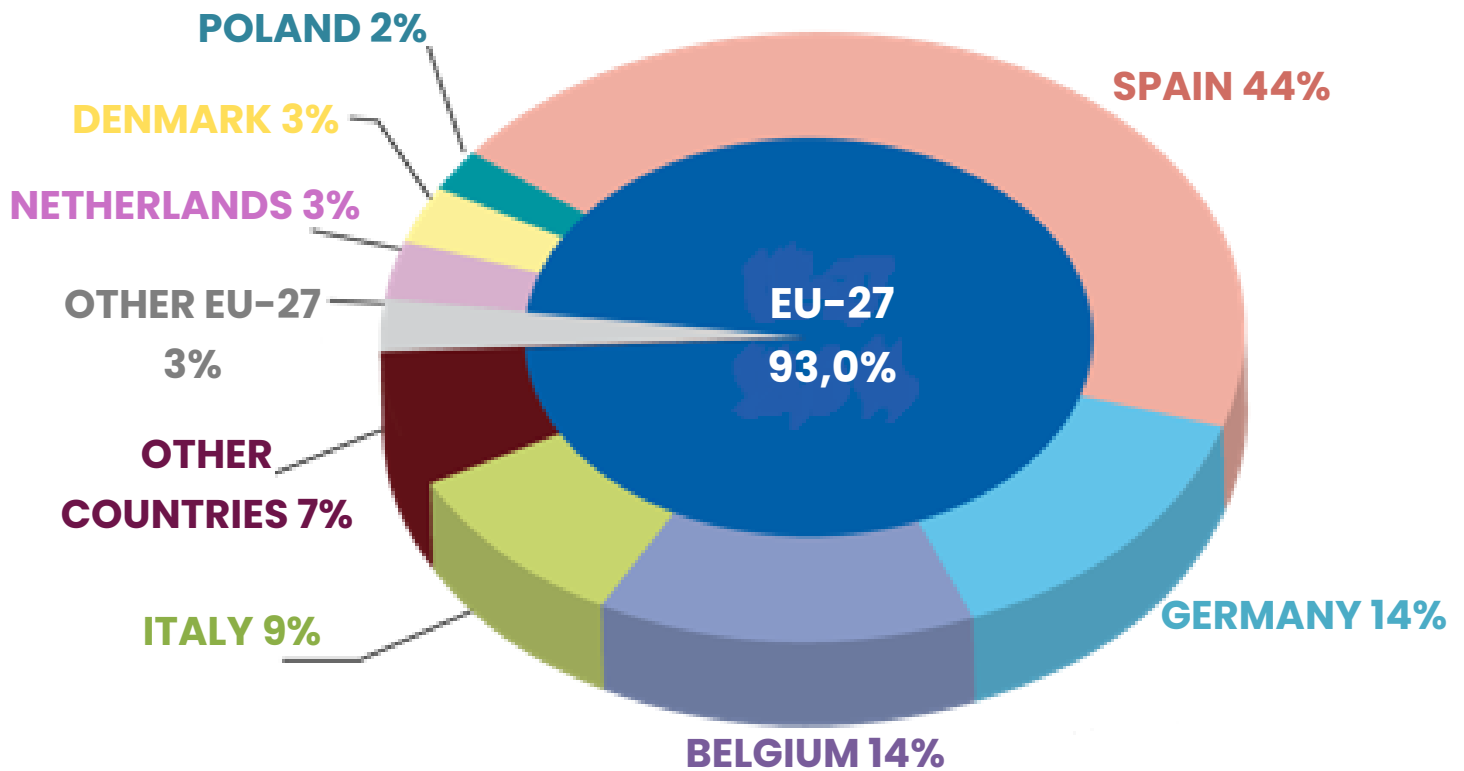
Source : Ifip d'après SSP-AGRESTE, Eurostat, douanes



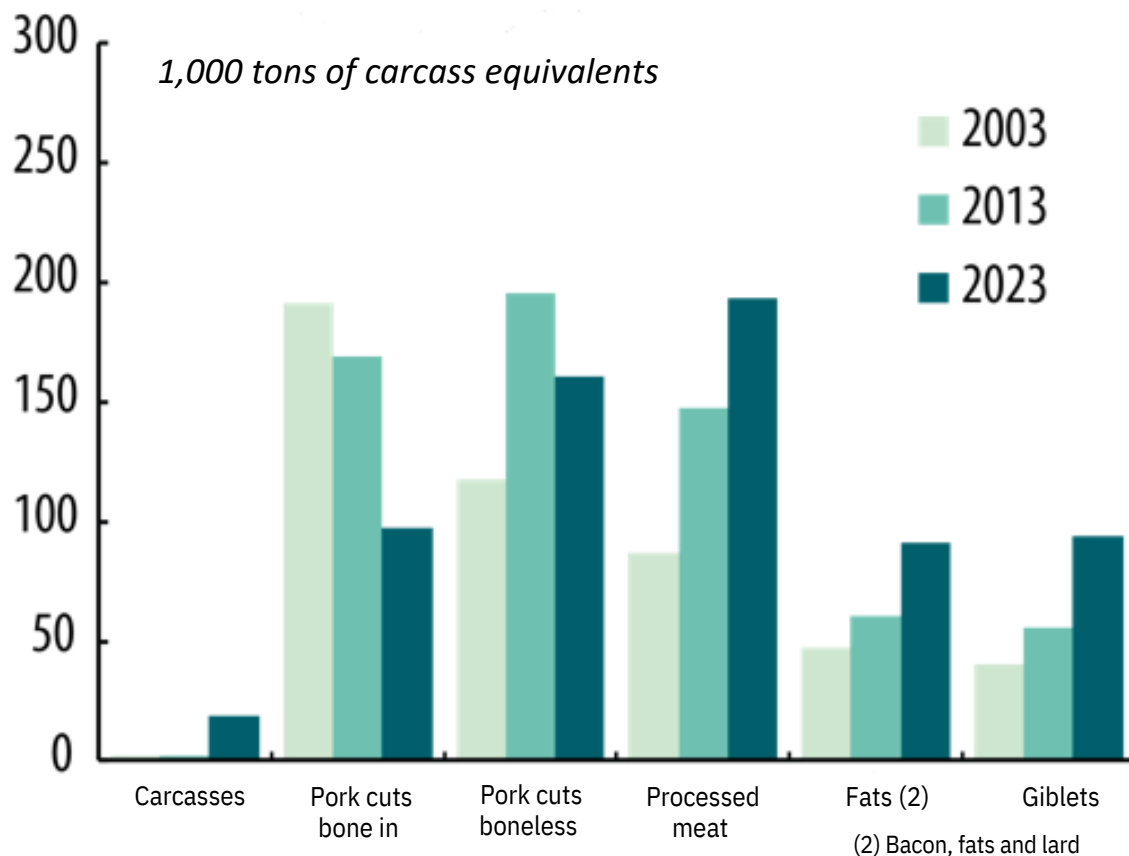
# Imports

## SUPPLIERS IN 2023

Share of each country in total imports



## IMPORTED PRODUCTS





| 1 000 tons products | Piglets (1) | Processed pork (1) | Carcasses | Pieces | Salted meats | Fats (2) | Giblets | TOTAL Excl. alive |
|---------------------|-------------|--------------------|-----------|--------|--------------|----------|---------|-------------------|
| <b>Total</b>        | 120 390     | 7 565              | 18,8      | 258,0  | 192,9        | 90,7     | 93,7    | <b>654,1</b>      |

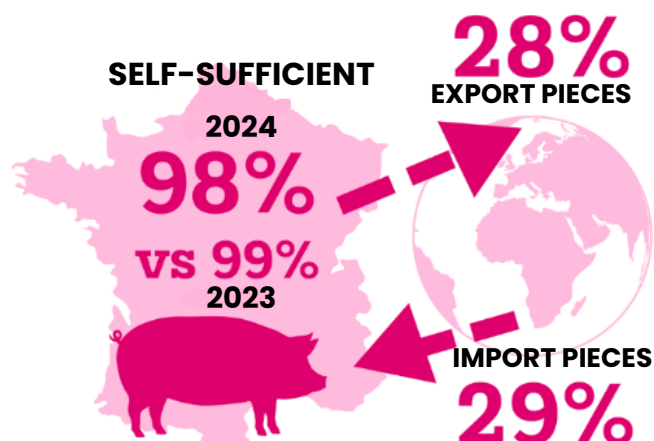
|             |         |       |     |       |       |      |      |       |
|-------------|---------|-------|-----|-------|-------|------|------|-------|
| EU - 27     | 120 390 | 7 565 | 3,0 | 251,1 | 186,7 | 90,3 | 77,0 | 608,0 |
| Spain       | 1       | -     | 0,4 | 188,3 | 50,3  | 6,3  | 45,6 | 290,8 |
| Germany     | 26 793  | -     | 0,6 | 20,3  | 52,5  | 8,3  | 11,0 | 92,7  |
| Denmark     | 4 062   | 4 691 | 0,0 | 15,8  | 2,1   | 0,0  | 1,5  | 19,4  |
| Belgium     | 44 564  | -     | 0,9 | 9,5   | 20,2  | 57,9 | 4,2  | 92,7  |
| Netherlands | 43 801  | 2 845 | 0,3 | 8,1   | 7,7   | 1,3  | 3,3  | 20,7  |
| Italy       | -       | -     | 0,3 | 3,6   | 37,3  | 12,6 | 2,3  | 56,1  |
| Poland      | -       | -     | 0,0 | 1,9   | 8,2   | 0,6  | 4,1  | 14,7  |
| Other EU-27 | 1       | 0     | 0,4 | 3,6   | 8,5   | 3,4  | 4,9  | 20,8  |

|                 |   |   |      |     |     |     |      |      |
|-----------------|---|---|------|-----|-----|-----|------|------|
| Other countries | 0 | 0 | 15,8 | 7,0 | 6,2 | 0,4 | 16,7 | 46,1 |
|-----------------|---|---|------|-----|-----|-----|------|------|

1) 1,000 Heads

Source : Ifip d'après douanes

2) Bacon, fats and lard

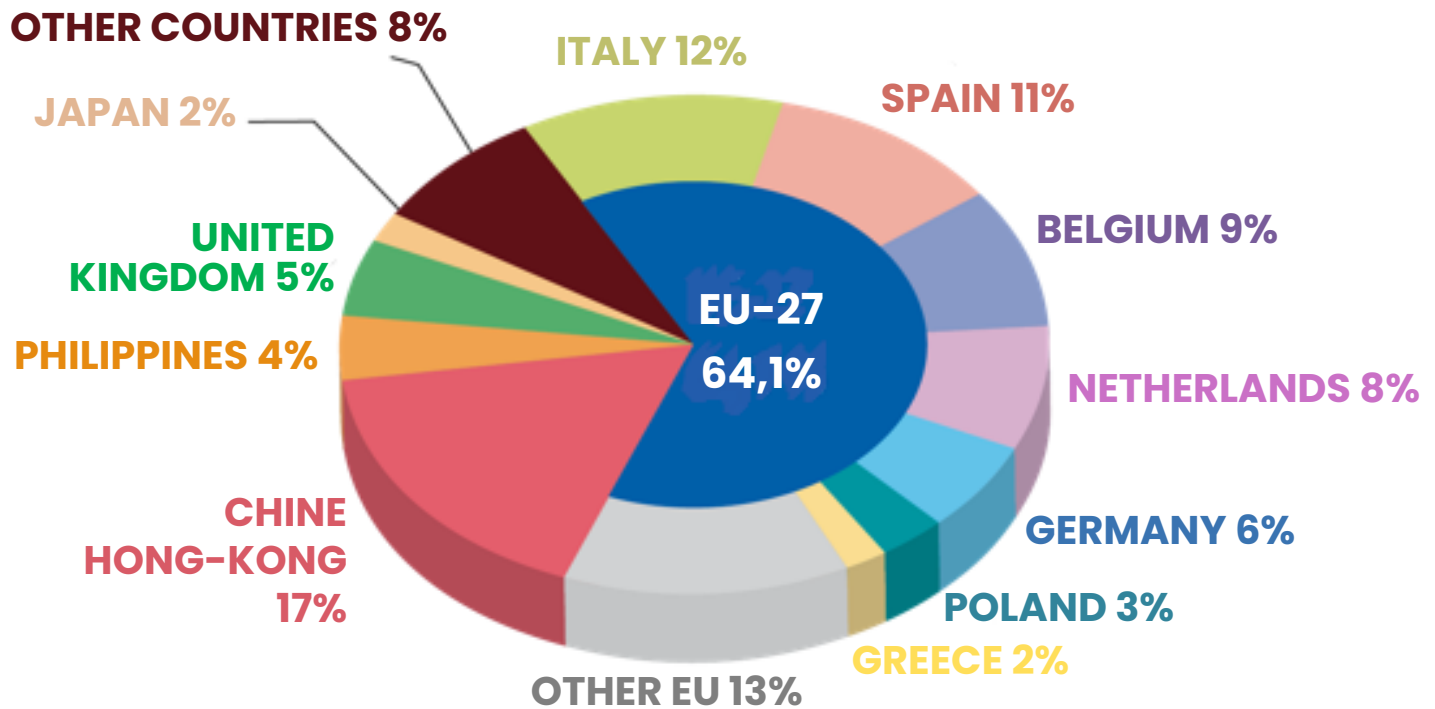




# Exports

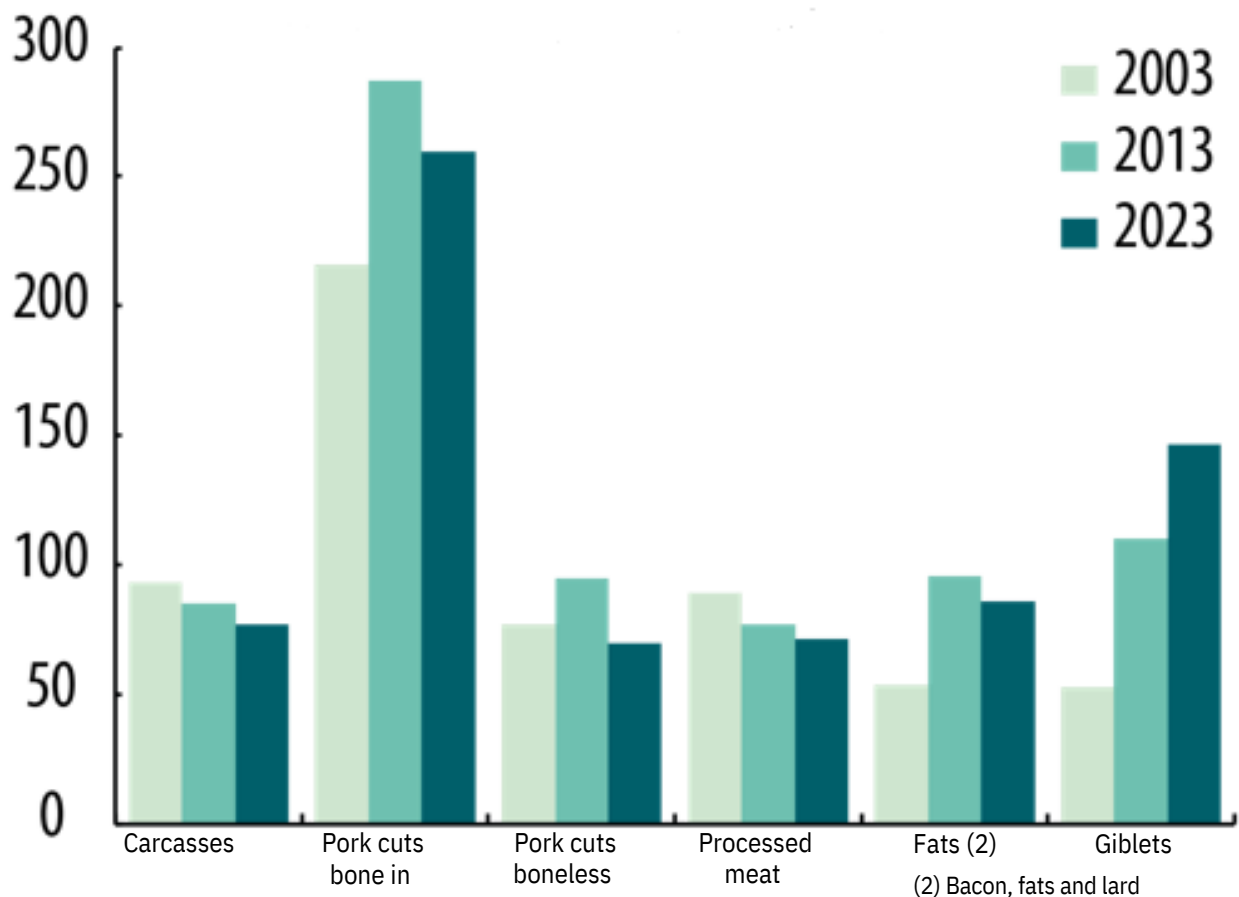
## CUSTOMERS IN 2023

Share of each country in total exports



## EXPORTED PRODUCTS

1,000 tons of carcass equivalents





| 1 000 tons products | Piglets (1) | Processed pork (1) | Carcasses | Pieces | Salted meats | Fats (2) | Giblets | TOTAL Excl. alive |
|---------------------|-------------|--------------------|-----------|--------|--------------|----------|---------|-------------------|
| <b>Total</b>        | 6 346       | 198 017            | 77,2      | 329,5  | 71,0         | 86,1     | 146,3   | <b>710,2</b>      |

|             |       |         |      |       |      |      |      |       |
|-------------|-------|---------|------|-------|------|------|------|-------|
| EU - 27     | 2 688 | 197 017 | 77,2 | 212,5 | 41,4 | 74,7 | 49,4 | 455,1 |
| Italy       | -     | 12 439  | 40,8 | 39,4  | 2,2  | 0,4  | 1,2  | 84,0  |
| Spain       | 858   | 36 278  | 0,7  | 34,0  | 4,0  | 28,8 | 11,8 | 79,3  |
| Belgium     | 413   | 127 466 | 3,3  | 21,2  | 15,8 | 10,0 | 12,3 | 62,6  |
| Netherlands | 32    | 4 079   | 0,4  | 17,5  | 2,0  | 27,9 | 11,2 | 59,0  |
| Germany     | -     | 9 735   | 19,2 | 8,0   | 9,0  | 0,0  | 4,0  | 41,0  |
| Poland      | 1     | 374     | 0,8  | 17,0  | 1,0  | 1,0  | 1,0  | 21,0  |
| Greece      | -     | -       | 10,2 | 7,0   | 0,0  | 0,0  | 0,0  | 17,0  |
| Other EU-27 | 1 384 | 6 646   | 1,6  | 68,2  | 6,6  | 6,4  | 8,0  | 90,8  |

|                   |       |       |     |       |      |      |      |       |
|-------------------|-------|-------|-----|-------|------|------|------|-------|
| Other countries   | 3 658 | 1 000 | 0,1 | 117,0 | 29,6 | 11,4 | 97,0 | 255,1 |
| China + Hong-Kong | 706   | 0     | 0,0 | 47,6  | 0,5  | 1,0  | 69,4 | 118,5 |
| Philippines       | 0     | 0     | 0,0 | 15,0  | 0,0  | 6,0  | 11,0 | 32,0  |
| United Kingdom    | 0     | 0     | 0,0 | 23,0  | 12,0 | 0,0  | 1,0  | 36,0  |
| Japan             | 97    | 0     | 0,0 | 13,0  | 0,0  | 0,0  | 1,0  | 14,0  |

1) 1,000 Heads

2) Bacon, fats and lard

Source : Ifip d'après douanes



# Consumption in France

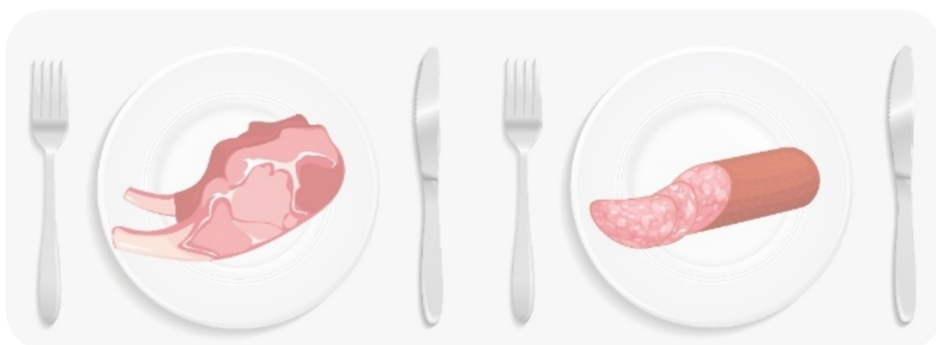
## MEAT CONSUMPTION

*Kg carcass equivalent per capita and per year*

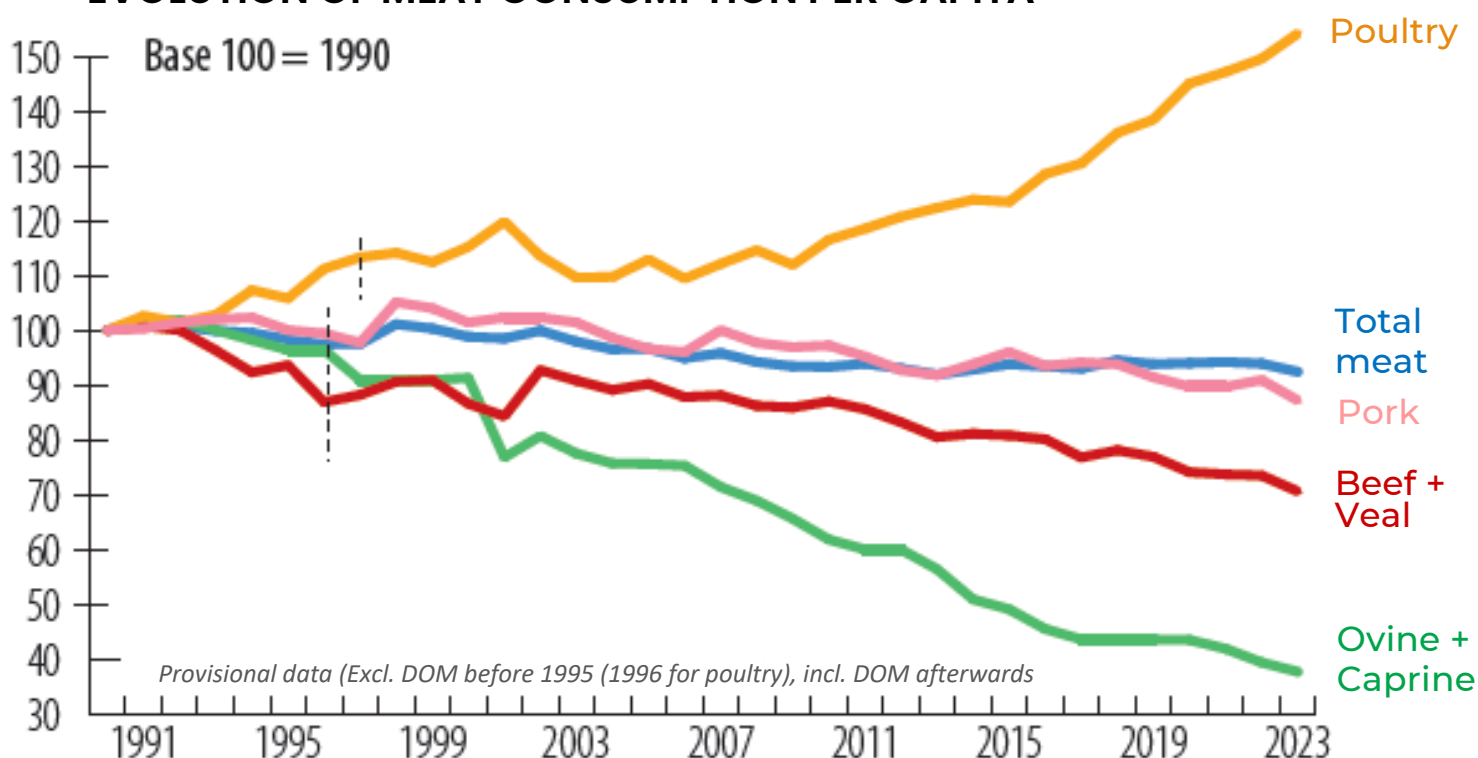
|                       | 2003        | 2013        | 2019        | 2022        | 2023        | Evolutions    |               |               |
|-----------------------|-------------|-------------|-------------|-------------|-------------|---------------|---------------|---------------|
|                       |             |             |             |             |             | 2023-2013     | 2023-2019     | 2023-2022     |
| <b>Pork (1)</b>       | <b>35,3</b> | <b>32,1</b> | <b>31,7</b> | <b>31,9</b> | <b>30,6</b> | <b>- 4,5%</b> | <b>- 3,5%</b> | <b>- 4,0%</b> |
| Beef + Veal           | 26,3        | 23,6        | 22,9        | 22,2        | 21,3        | - 9,7%        | - 7,0%        | - 4,1%        |
| Ovine - Caprine       | 3,9         | 2,8         | 2,5         | 2,4         | 2,3         | - 18,1%       | - 8,3%        | - 4,2%        |
| Poultry               | 21,8        | 24,1        | 28,2        | 28,2        | 29,1        | + 20,4%       | + 3,1%        | + 3,1%        |
| <b>Total meat (2)</b> | <b>87,3</b> | <b>82,6</b> | <b>85,3</b> | <b>84,7</b> | <b>83,3</b> | <b>+ 0,8%</b> | <b>- 2,4%</b> | <b>- 1,6%</b> |

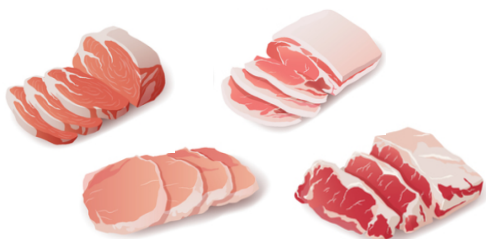
1) All pork products

2) Including Poultry, Excl. offal and game



## EVOLUTION OF MEAT CONSUMPTION PER CAPITA

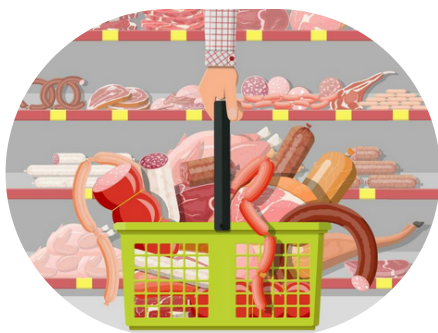




### Fresh Pork (Excl. Big-ticket)

|                                   | 2019 | 2022 | 2023 | 2023<br>2022 |
|-----------------------------------|------|------|------|--------------|
| Hypermarket                       | 36,6 | 36,7 | 37,6 | + 0,9        |
| Supermarket and convenience store | 35,9 | 34,9 | 35,7 | + 0,8        |
| Hard Discounters                  | 10,4 | 12,9 | 11,2 | - 1,7        |
| Online sale                       | 1,7  | 2,2  | 2,5  | + 0,3        |
| Butchers – Delicatessens shops    | 7,9  | 6,9  | 6,4  | - 0,5        |
| Other (markets, direct sales...)  | 7,5  | 6,3  | 6,6  | + 0,3        |

Source : Ifip d'après  
Kantar - FranceAgriMer



### Delicatessen (Excl. Poultry & Sausage)

|                                   | 2019 | 2022 | 2023 | 2023<br>2022 |
|-----------------------------------|------|------|------|--------------|
| Hypermarket                       | 36,4 | 34,7 | 35,0 | + 0,3        |
| Supermarket and convenience store | 35,3 | 35,1 | 35,5 | + 0,4        |
| Hard Discounters                  | 14,4 | 14,0 | 13,4 | - 0,6        |
| Online sale                       | 4,5  | 7,2  | 7,5  | + 0,3        |
| Butchers – Delicatessens shops    | 4,5  | 3,9  | 3,8  | - 0,1        |
| Other (markets, direct sales...)  | 4,9  | 5,1  | 4,8  | - 0,3        |



# Quality initiatives

*The sector is committed to offering quality products and has set production requirements, from breeding to processing.*



## French Pork

Guarantees the French origin of the animals  
Identification and traceability system



## Red Label

High quality  
Production according to specific criteria



## Organic farming

Specific breeding criteria  
Feed from organic farming



## Protected Geographical Indication

Used as a description of an agricultural product or a foodstuff :

- which comes from such an area, place or country,
- which has a specific quality, goodwill or other characteristic property, attributable to its geographical origin,
- the least one of the stages of production, processing or preparation takes place in the area.



## Controlled Designation of Origin (French Label) or Protected Designation of Origin (European Label)

Used as a description of an agricultural product or a foodstuff :

- which comes from such an area, place or country,
- whose quality or properties are significantly or exclusively determined by the geographical environment, including natural and human factors,
- whose production, processing and preparation takes place within the determined geographical area.



# Pig farms

## DISTRIBUTION OF FRENCH PIG PRODUCTION BY REGION

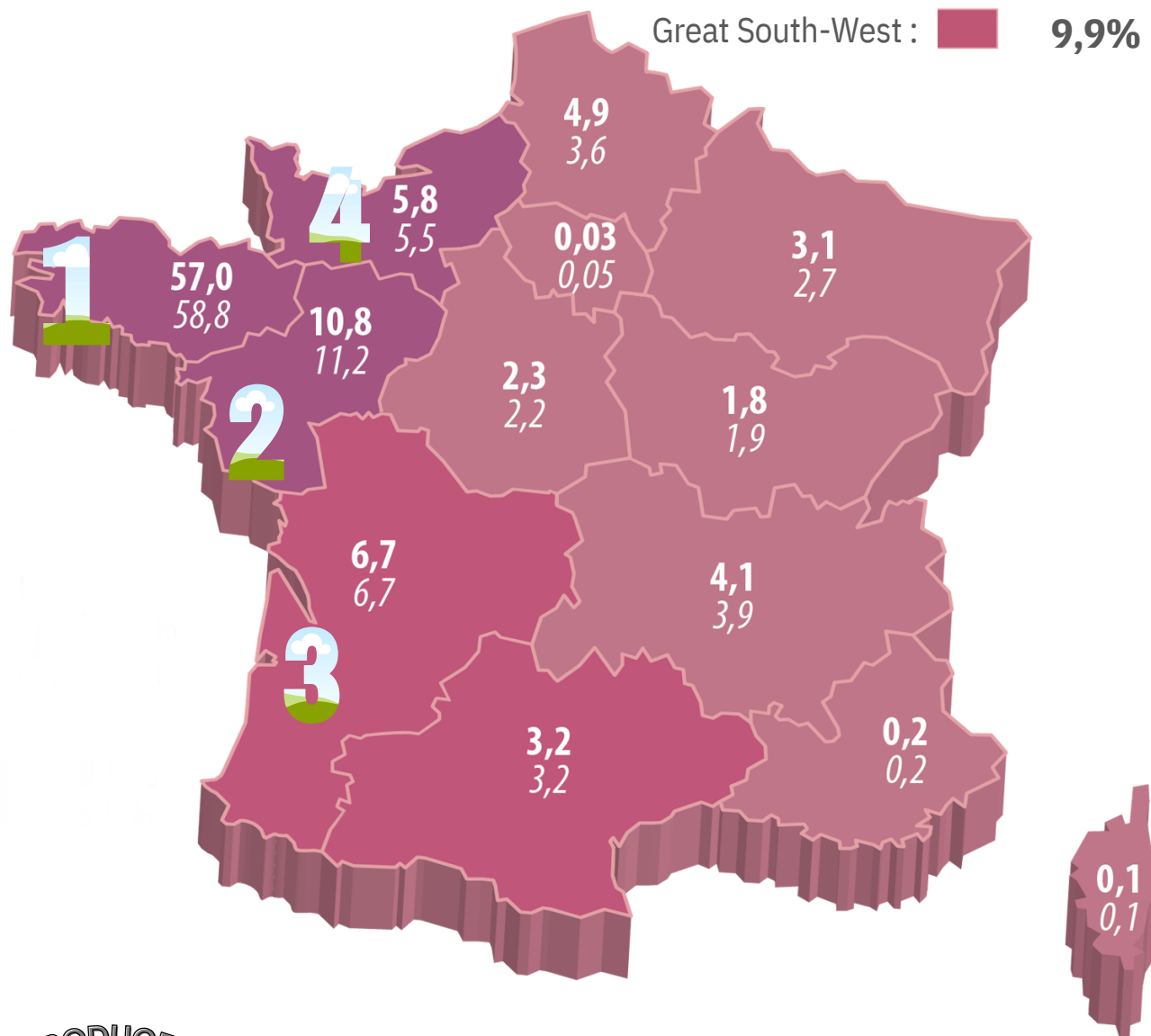
(as % of total, France, tons produced, according to carcass weight)

**2023**

**2013**

West : **73,6%** 75,5%

Great South-West : **9,9%** 9,9%



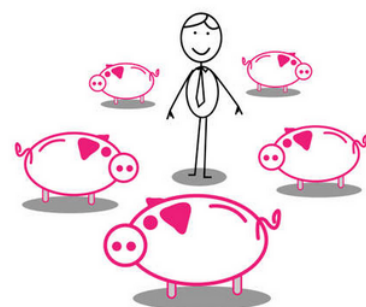
**IN MILLIONS OF HEADS: 21,600**

1 – Brittany : 12,300

2 – Pays de la Loire : 2,319

3 – Aquitaine : 1,380

4 – Normandy : 1,229

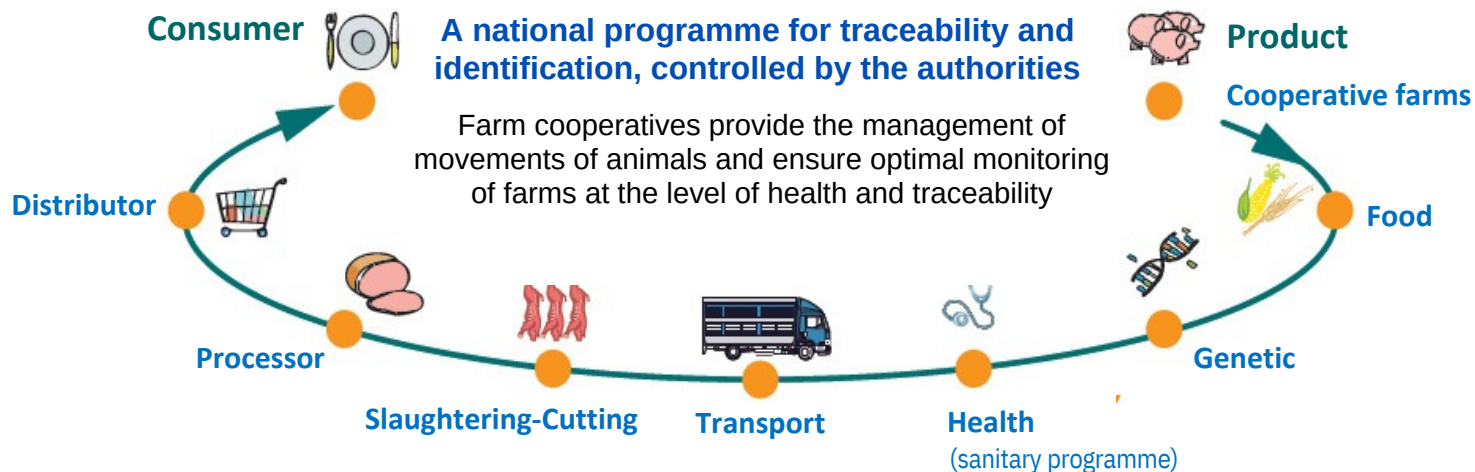


**10 000** pig farms



# Pork genetics

To ensure the safety and quality of the products



## SELECTING TO SERVE THE PIG SECTOR'S REQUIREMENTS

The targets of breeding: birthrate, growth, carcass and quality of meat

### • For boars:

- improvement in growth performance (speed of growth, feeding efficiency) and the quality of carcasses (thickness of back lard, composition of carcass, lack of sensitivity to stress, quality of meat etc.).

### • For sows:

- prolificacy (piglets born alive and weaned, etc.) and maternal qualities (piglet growth, number of teats).

## EVER-IMPROVING PERFORMANCES

French genetics is disseminated through more than 40 countries on all 5 continents

A very strict, national health programme

- France: free of classical swine fever and free of Aujeszky's disease.
- Guarantees for and strict controls of breeding stock and semen..
- A national program for identification and traceability.

Meat quality that meets increasingly stringent specifications

- to ensure products' health safety and meet consumers' expectations.
- suited to different markets (dry and cooked processed meats) and customers (France, EU, Russia, Japan etc.)

Very high hygienic standards met in all parts of the sector: due to heavy involvement by the authorities

A French culture of processing:  $\frac{3}{4}$  of French pork changed into very varied products based on the richness of its cuisine



## PIG SELECTION ORGANIZATIONS OPERATING IN FRANCE

### • Breeding animal suppliers



Lieu-dit La Garenne - 37310 AZAY-SUR-INDRE France



+33 2 47 59 95 21

[contact@axiom-genetics.com](mailto:contact@axiom-genetics.com)



[www.axiom-genetics.com/fr/](http://www.axiom-genetics.com/fr/)



7, rue des Orchidées Le Bourg Nouveau - 35650 LE RHEU France



+33 2 99 14 64 81

[contact@nucleus-sa.com](mailto:contact@nucleus-sa.com)



[www.nucleus-sa.com/](http://www.nucleus-sa.com/)



69, Chemin des Molières – Parc d'activités du Charpenay

69 210 LENTILLY France -  +33 2 96 76 50 50

[picfrance.info@pic.com](mailto:picfrance.info@pic.com)



[www.pic.com](http://www.pic.com)



1, Rue Jean Rostand – Zoopôle - 22440 PLOUFRAGAN France



+33 2 96 77 46 34

[hypor@hendrix-genetics.com](mailto:hypor@hendrix-genetics.com)



[www.hypor.com](http://www.hypor.com)



10 place du Bois Noir – CS30500 - 29419 LANDERNEAU France



+33 2 29 02 15 20

[topigs@topignorsvin.fr](mailto:topigs@topignorsvin.fr)



[www.topignorsvin.fr](http://www.topignorsvin.fr)



17 rue du Sabot – Parc technologique du Zoopole

22440 PLOUFRAGAN France -  +33 2 96 93 21 63

[danbredfrance@danbred.com](mailto:danbredfrance@danbred.com)



[www.danbred.com/fr/](http://www.danbred.com/fr/)

### • Pork semen suppliers



15 Saint Hubert

35590 SAINT GILLES France



+33 2 99 78 72 80

[commande@yxia.fr](mailto:commande@yxia.fr)



[www.yxia.fr](http://www.yxia.fr)



3595 Route de Tournai

59501 DOUAI France



+33 3 27 99 29 29

[dgd@genesdiffusion.com](mailto:dgd@genesdiffusion.com)



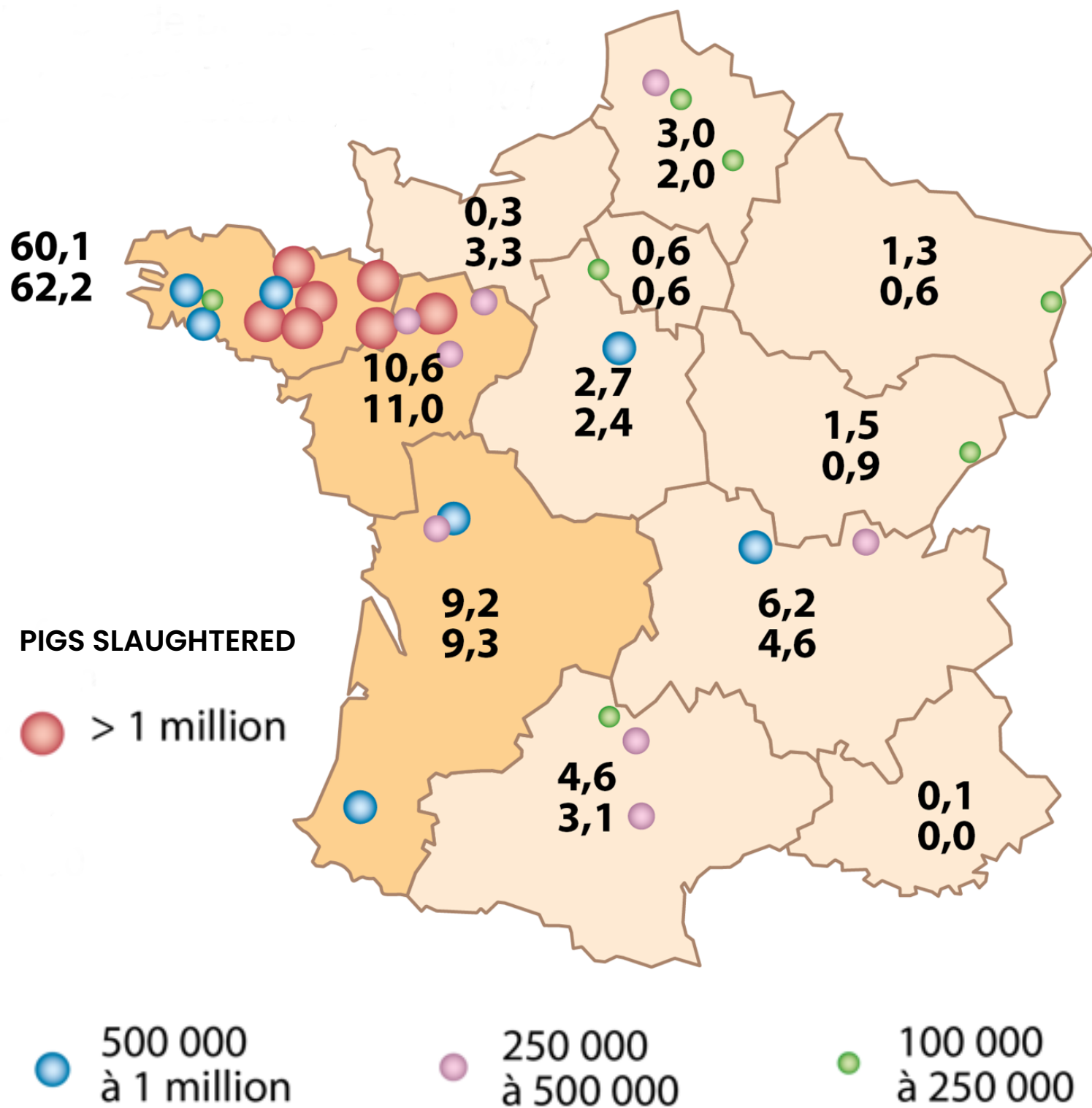
[www.genesdiffusion.com](http://www.genesdiffusion.com)



# Slaughterhouses

## REGIONAL BREAKDOWN OF SLAUGHTERHOUSES IN 2023

Number of pigs slaughtered, as % of France  
excluding overseas departments | **2023**  
2013





## STRUCTURE OF SLAUGHTERHOUSES

Activity 2023 Head



| Number of pigs per year | Number of Slaughterhouses | Share of national Slaughtering |
|-------------------------|---------------------------|--------------------------------|
| > 2 million             | 1                         | 11 %                           |
| 1 to 2 million          | 7                         | 43 %                           |
| 750 to 999 000          | 3                         | 12 %                           |
| 500 to 749 000          | 4                         | 11 %                           |
| 250 to 499 000          | 8                         | 12 %                           |
| 100 to 249 000          | 7                         | 5 %                            |
| < 100 000               | 129                       | 7 %                            |
| <b>Total</b>            | <b>159</b>                | <b>100</b>                     |

## MAIN PORK SLAUGHTERHOUSES

Activity 2023 Head

| Companies                        | Pigs Slaughtered in thousands | All France  |
|----------------------------------|-------------------------------|-------------|
| 1 – Groupe Bigard                | 5 051                         | 23 %        |
| 2 – Cooperl                      | 4 404                         | 20 %        |
| 3 – Agromousquetaire             | 2 516                         | 12 %        |
| 4 – Groupe Jean Floc'h           | 2 332                         | 11 %        |
| 5 – Kermené (Filiale E. Leclerc) | 1 873                         | 9 %         |
| 6 – Tradival (Sicarev)           | 1 255                         | 6 %         |
| 7 – FIPSO                        | 630                           | 3 %         |
| 8 – Vallégrain                   | 468                           | 2 %         |
| 9 – Groupe Carnivor              | 431                           | 2 %         |
| 10 – Terrena (Holvia Porc)       | 346                           | 2 %         |
| <b>The 10 first</b>              | <b>19 307</b>                 | <b>88 %</b> |
| <b>National slaughters</b>       | <b>21 840</b>                 |             |

Sources : IFIP d'après Uniporc, BDPOPC



# Salted meat

## PRODUCTION OF COOKED AND CURED MEAT PRODUCTS IN 2022

(% of volumes produced)

### SAUSAGES 26,2 %

Steamed sausages cooked or uncooked

4,2%

**Pork cooked or uncooked sausages**

17,6%

Andouilles tripe sausage, andouillette tripe sausage, black and white pudding

4,1%

**Pork sausages**

0,3%



### COOKED MEAT 30,9 %

**Cooked ham and shoulder**

27,3%

Other cooked products (knuckle of ham, shank,...)

3,6%

### CURED MEAT (Salted, Dried and/or Smoked) 21,7 %

Cured pork belly

11,2%

**Dry cured ham and shoulder**

5,3%

Other dry cured pieces (loin, bacon, coppa,...)

5,2%



### PATES AND POTTED MEAT 9,1 %

Pâté and terrine other than liver

6,2%

**Rillettes**

1,9%

Pâté and terrine other than live \*\*

1,0%

\*\* Campagne, pâté croûte, de tête...



*There are nearly 300 industrial delicatessen-cured meats companies and produce around 1.2 million delicatessen products.*

*There are 6,500 artisanal delicatessen companies.*



Sources : Banque de France pour FICT

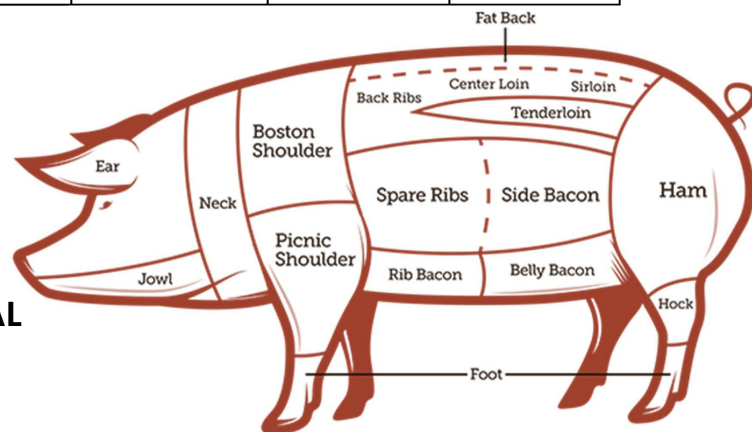
| Distribution of companies by employees (2023) | Companies' number | Employees | Distribution of Turnovers |
|-----------------------------------------------|-------------------|-----------|---------------------------|
| Micro Enterprise < 10 employees               | 22 %              | 2 %       | 2 %                       |
| Small Enterprise > 10 à 50 employees          | 54 %              | 22 %      | 18 %                      |
| Medium Enterprise > 50 à 250 employees        | 19 %              | 34 %      | 36 %                      |
| Big Enterprise > 250 à 4999 employees         | 4 %               | 42 %      | 45 %                      |



**FRENCH MEAT  
PROFESSIONAL  
ORGANISATIONS**



**FRENCH PROFESSIONAL  
FOOD-PROCESSING  
FEDERATION**



### Charcuterie specialties

<https://www.lescharcuteries.fr/en/charcuterie-a-z/>

### Different meat cuts:

[www.frenchporkcuts.com](http://www.frenchporkcuts.com)

## FRANCE PRODUCES DIFFERENT SPECIALTY MEAT PRODUCTS:

### Cooked meat products



### Cured meat products

### Fresh meat products





# THE FRENCH PIG SECTOR

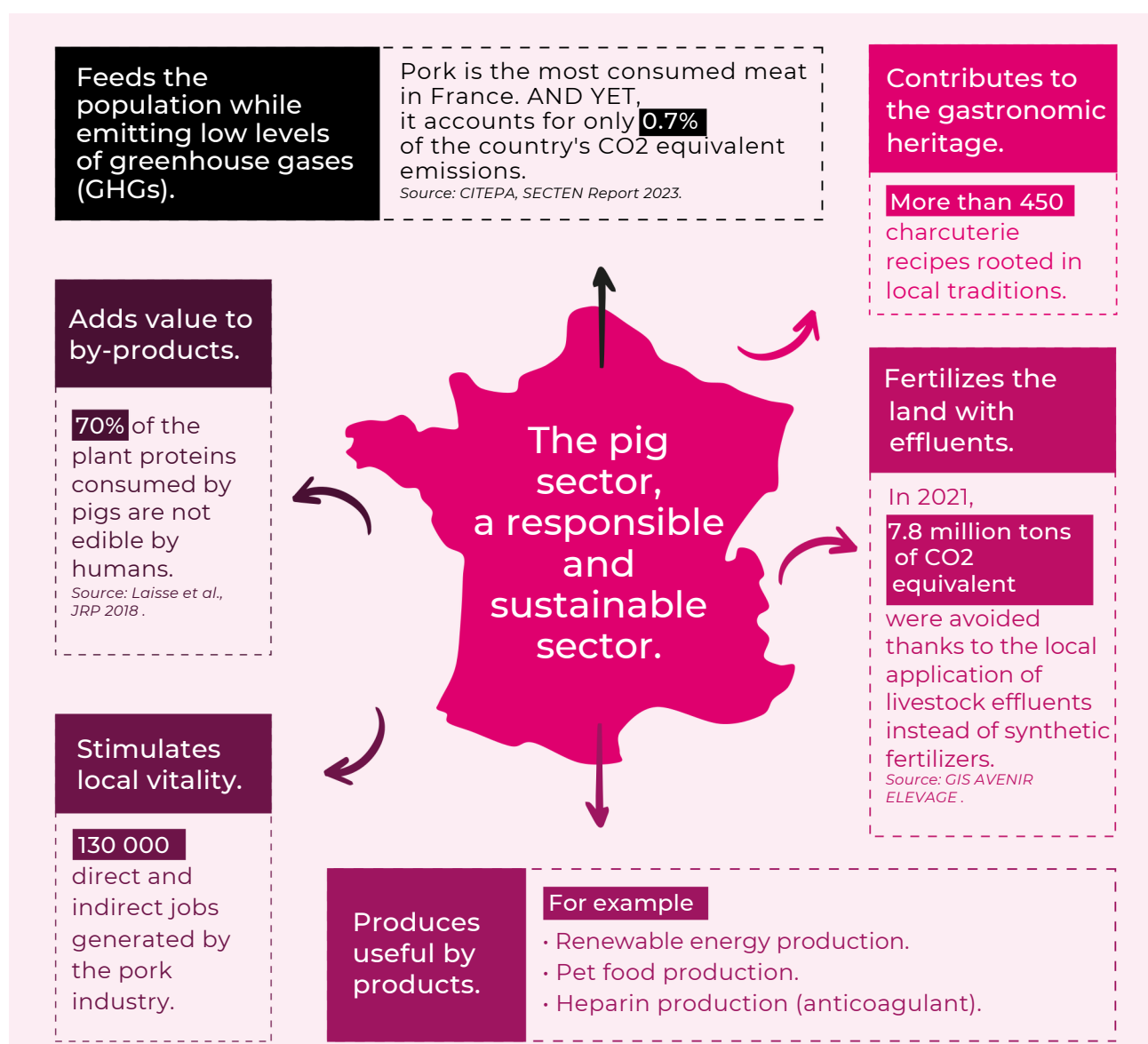
is already **taking positive action**

**demain  
le P. RC**  
TOUS ENGAGÉS POUR UNE FILIÈRE  
ATTRACTIVE ET DURABLE

**We can all be proud to feed the population with high-quality, affordable products.**

Proud to produce responsibly, with low greenhouse gas emissions, generating renewable energy, and fertilizing the land.

Proud to contribute to the vitality of our regions with 130,000 direct and indirect jobs, from animal feed to distribution.



**NOTE...**

[illegible]