

Supporting  
the region's  
food industry

ANGRI



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  - 2. Promote
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**DE NOTRE  
TERRE  
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## WORKING FOR GOOD-QUALITY FOOD

The Pays de la Loire region is known for its dynamic, diverse agriculture.

The food we grow here is part of our identity. Our region's agriculture, fisheries, aquaculture and food-processing industries work hand in hand. They are a key part of our economy. Yet a series of crises now poses a threat to this vital industry. That is why the authorities must step in to maintain standards and keep the sector competitive.

The Pays de la Loire Region is determined to do whatever it can to give local farmers a helping hand and support the development of the region's agriculture – in all its variety. The Region has devised a ground-breaking agriculture and food industry competitiveness strategy to ensure good-quality food for all, bringing together farmers, food-processors, retailers and consumers. Monitoring implementation of the strategy will be a team effort too, with regular meetings to report back on what has been done and on progress towards our end goal.

This spirit of cooperation guides everything we are doing at the Pays de la Loire Region to strengthen our entire food industry – From Farm to Fork.



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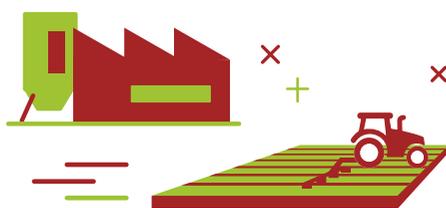
**Christelle Moraçais**  
President, Pays de la Loire  
Regional Council

# AGRICULTURE AND FOOD-PROCESSING IN PAYS DE LA LOIRE: CONSOLIDATING AN ALREADY-POWERFUL ASSET



THE REGION'S NUMBER-ONE  
INDUSTRY

**170,000**  
jobs



CLOSE TIES BETWEEN  
AGRICULTURE AND THE  
FOOD-PROCESSING INDUSTRY

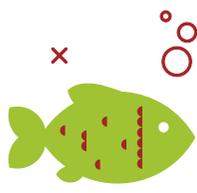
**20**  
billion euros  
in turnover



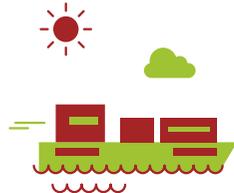
## A POWERFUL FISHERIES SECTOR

**2<sup>nd</sup>**

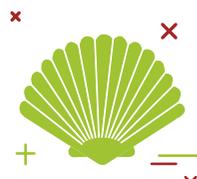
biggest region  
in France  
for marine fisheries  
by value



**25,656 tonnes**  
of catches landed, worth  
more than €110 million  
(2016)



**359 boats**  
employing  
1,187 fishermen  
(2015)



**Shellfish farming**  
360 companies  
employing more than  
1,000 full-time  
equivalent staff

**25%**  
of the region's  
exports



## DIVERSE AGRICULTURE, LEADING THE WAY IN MANY SECTORS

**6**

billion euros  
(5<sup>th</sup> nationally)

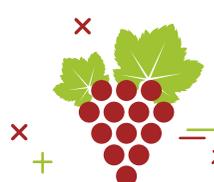
Sectors with a strong ripple  
effect: aeronautics,  
shipbuilding,  
food-processing



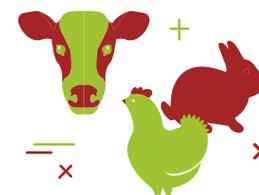
More than **110**  
Label Rouge (Red Label)  
certifications, **30 AOPs**  
(protected designations of origin)  
and **34 PGIs** (protected  
geographical indications)



**25,000**  
farms (2013) and 70,000  
jobs in agriculture  
(2015)



**2/3**  
of wines protected by an AOP or  
AOC (controlled designation of  
origin) mark



## A BOOMING LIVESTOCK FARMING SECTOR

Number 1 region for beef and rabbit

Number 2 region for cow's and  
goat's milk, pork and poultry

## FERTILE GROUND FOR FRUIT AND VEGETABLES

France's number-one region  
for market gardening



## FARMLAND SHRINKING YEAR ON YEAR

Over the past 35 years,  
**6,000**  
hectares  
of farmland have been lost in the  
region annually.

## A DYNAMIC FOOD- PROCESSING INDUSTRY AND A MAJOR SOURCE OF EMPLOYMENT

**14**

billion euros  
in turnover  
(3<sup>rd</sup> nationally)



**1,049**

firms  
employing 47,500 people  
(excluding independent  
traders)

## CRISIS TIMES

for the region's  
livestock farming  
sector and agriculture  
more generally, as  
prices have fallen in  
recent years for many  
reasons (withdrawal  
of European milk  
quotas, falling meat  
consumption, Russian  
embargo, etc.).

**PRESSING NEED  
TO BOOST THE  
INDUSTRY'S  
COMPETITIVENESS**

## HELPING THE REGION'S FOOD INDUSTRY GAIN A COMPETITIVE EDGE

The priorities for each sector, and actionable ways to achieve them, were determined collectively by local experts (Regional Chamber of Agriculture, DRAAF, Cap Aliment and SMIDAP) and at workshops attended by more than 400 people.

### Common priorities across all sectors

- Boost economic performance and profitability
- Manage workload (quantity and quality)
- Achieve adequate return on investment
- Attract new people into the industry
- Make it easier to access land
- Improve environmental performance without impacting competitiveness

## THE FOOD INDUSTRY STRATEGY 2016-2020



Since February 2016, the Regional Council has voted to:

- Release around €52 million in arrears and advances on European agricultural aid for 2015
- Inject more European and regional funding into modernising farms and building new ones (around 1,000 farms were modernised in 2016)
- Mobilise €1.2 million to support struggling farmers.

The Food Industry Strategy 2016-2020 is designed to be **immediately actionable** and to help the region's agriculture sector become more competitive and move upmarket by adding value.

Working with its partners (the European Union, the French government, the French Water Agency and departmental councils), **the Pays de la Loire Region has voted to mobilise around €200 million to support local agriculture.**

The cross-cutting Food Industry Strategy aligns with and supplements the Regional Council's other strategies and plans:

- Economic strategy
- Tourism strategy
- Energy transition roadmap
- European strategy
- Rural pact
- Digital plan

### Key sectors and strategies



#### Arboriculture

Meet consumer-citizen demand in terms of innovation and sustainability; remain competitive, especially on the export market.

#### Poultry

Modernise existing facilities and build new ones; bring farmers closer to consumers in Pays de la Loire and nationwide to regain the region's hold over the domestic market.

#### Cereal, oilseed and protein-rich crops

Work together to tackle climate change and protect soil in a globally competitive, strictly regulated environment.

#### Aquaculture

Develop new aquaculture markets and products; reduce shellfish losses.

#### Rabbit meat

Educate consumers about rabbit meat and develop innovative new products that meet demand; better promote rabbit meat products in medium and large supermarkets and maintain production.

#### Veal

Promote veal to consumers; showcase the diversity and quality of produce; expand the local and national market and innovate.

#### Fisheries

Make fisheries companies more competitive; secure their long-term future while making fishing quotas clearer; communicate about occupations and products in the sector while meeting consumer demand.

#### Beef

Meet consumer demand; add value (through segmentation); think "glocal" (local and export market).

#### Goat's meat

Secure a viable future and improve farms' technical and economic performance.

#### Mutton and lamb

Meet consumer product demand and bring farmers and consumers closer together; improve farms' technical and economic performance to secure a viable future and boost production.

#### Pork

Maintain competitiveness in a multi-tier market and meet demand for organic produce.

#### Dairy

Work together to create and share added value; strengthen ties with consumers and change mindsets to produce for a market.

#### Market gardening

Meet consumer-citizen demand and maintain competitiveness, especially on the export market.

#### Wine

Create new vineyards and secure a viable future for existing ones; maintain competitiveness, especially on the export market; bring producers and consumers closer together and meet consumer demand for sustainable practices.

## THE METHOD: CONSULTING WITHIN AND BETWEEN SECTORS

When devising its agriculture, food-processing and food industry competitiveness strategy, the Region was determined to consult widely and foster dialogue both within and between sectors. The process was spearheaded by Lydie Bernard, Vice-President of the Regional Council, with input from industry experts, competitiveness clusters, the region's economic, social and environmental council (CESER), and local elected representatives.

### A three-stage preparation process\*

- 1 Sector-by-sector analysis of the region's landscape, performed by experts
- 2 11 workshops attended by sector representatives to identify priorities and actionable measures
- 3 Sector-by-sector consumer research (8,000 people surveyed)

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**Claude Cochonneau**, President, Pays de la Loire Regional Chamber of Agriculture; President, Permanent Assembly of Chambers of Agriculture

### Leading by example



*The quality of the group work was simply remarkable. It sets the bar for other regions to follow.*

*We found plenty of common ground. Our collective priorities are to gain recognition for local produce, create value and share it evenly between farmers and the food-processing industry, and cover all markets - from local consumers right through to markets across the region, and elsewhere in France and beyond.*



### Create, promote, protect, unite

The “From Farm to Fork” strategy was unveiled at a regional conference on 2 December 2016. The four-part strategy – **create, promote, protect, unite** – outlines the Regional Council's roadmap for agriculture and the food-processing industry going forward.

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**Lydie Bernard**, Vice-President, Pays de la Loire Regional Council; Chair, Agriculture, Food-processing, Forestry, Fisheries and Sea Committee

### A ground-breaking method to build collective momentum



*The ground-breaking method involved gathering input from 11 sectors over a period of several weeks. We focused on practical ways to help farmers make a decent living from their work and to meet consumer demand. The collective momentum we built should serve as an example. Our aim is to gain recognition for the work that farmers do, keep consumers happy, share value evenly across the sector and - most importantly - boost competitiveness.*



## A FOUR-PART FOOD INDUSTRY STRATEGY

1. **CREATE**  
Helping farmers set up, pass on and modernise their farms, deliver training and foster innovation
2. **PROMOTE**  
Spreading the word about the region's agriculture across France and around the world
3. **PROTECT**  
Shielding farmers from geopolitical, economic, food safety and climate shocks
4. **UNITE**  
Bringing the entire industry together



### 1. CREATE

Helping farmers set up, pass on and modernise their farms, deliver training and foster innovation

**500**  
new farms set up each year

More than **800** trainees on agriculture/landscaping vocational courses each year, with **€8 million** in support from the Region

**48 years**  
average age of farm managers

### Helping young farmers

*Improving farms and securing a viable future*

Pays de la Loire has more young farmers setting up their own businesses each year – around 500 in total – than almost any other region in France. The Regional Council is working to give them every chance of success in the long term:

- increasing the young farmers' allowance (DJA) to around €10,000
- allocating 10% extra funding to modernisation projects for young farmers
- covering property storage costs prior to launching operations
- supporting initiatives to promote farming as a career
- developing innovative set-up funding methods.



**Julie Nayagom**, young farmer in Azé (Mayenne)



*After completing our studies at Laval agricultural college, my husband and I decided to stay in the region because our three children were born here. My husband set up the farm, GAEC des Trois Soleils, where we farm poultry and veal calves. I joined him later. When I joined, we invested in more veal calves, taking the total from 200 to 400. We also added a new building and paid some set-up costs upfront. It took five months to earn our first income from the new calves. The Regional Council's decision to increase the young farmers' allowance made a real difference, especially to our cash flow.*



\*in September and October 2016



© Région Pays de la Loire / A. Monie - Les beaux matins

## Modernising agricultural production and processing equipment

### Boosting competitiveness

Modernising equipment is a key priority across all sectors. Every innovative investment – in farmer and livestock well-being, in energy efficiency, or elsewhere – helps to make a business more competitive. The Region is mobilising EU funds, through the Farm Competitiveness and Adaptation Plan (PCAIE), to channel aid directly to investment projects – €52.8 million of the Region’s own funding and €59.5 million from the European Agricultural Fund for Rural Development (EAFRD) by 2020.

The Region is also supporting investments in advanced production technologies, which not only boost competitiveness, but also make work less labour-intensive for farmers, especially in the livestock sector.

## Strengthening the food industry innovation value chain

### Innovating to meet consumer demand

The Region launches several R&D calls for proposals each year. In 2017, more than €200,000 in funding was awarded to six fisheries and aquaculture projects. The rise of digital

technologies is also proving a boon for the food industry, boosting precision agriculture and improving microbiological testing capabilities. With support from the Region, a regional group of digital and food industry experts is involved in a European “Traceability and Big Data” partnership.

Innovation is vital to driving up performance in agriculture. In 2017, the Region once again participated in a European Innovation Partnership call for proposals, mobilising around €2 million in regional funding and €1.9 million from the EU.

Five solutions to five blue growth problems have already been identified through the RéSolutions regional call for proposals, which helps businesses find innovative solution suppliers. And a further five solutions, this time focusing on the future of agriculture, were selected at the end of 2017. These included a bone detection and removal solution for poultry products, and a biodynamic farm data analysis solution.

## Boosting farm performance on three fronts\*

### Turning environmental challenges into growth opportunities

Anticipating the impact of climate change is a key challenge. The energy transition can help farms regain their competitive edge by cutting costs, generating additional income, or even producing their own renewable energy.

The Region’s energy transition roadmap includes a series of measures that will be of benefit to farmers:

- a new regional fund to develop renewable energy production projects (anaerobic digestion)
- a regional call for proposals for self-supply solar power projects

*\*economic, environmental and social*

- roll-out of the Positive-energy Businesses (PEPs) scheme, which helps companies, especially in the agriculture sector, reduce their energy consumption, find alternative sources, or even produce their own energy by 2021

- efforts to strengthen the firewood sector and pilot a new, local carbon market.

## Tailoring training to business demand

### Preparing for the economy of the future

Agriculture and landscaping courses make up a large part of vocational training provision in Pays de la Loire. These programmes alone receive €8 million in regional funding each year, benefiting more than 800 trainees. The courses are changing to address the new challenges that the industry faces and to attract more people into farming as a career.

## 2. PROMOTE

### Spreading the word about the region’s agriculture across France and around the world

**4<sup>th</sup> biggest region in France** by organically farmed land

**64 products with guarantees of origin** (PDOs and PGIs)

More than **110 Label Rouge (Red Label) certifications**

**Pays de la Loire is France’s number-one** veal-producing region

**A diverse array of crops:** arable crops, small-scale horticulture, vegetables, wine, etc.

**2<sup>nd</sup> biggest region in France** for marine fisheries by value

## Locally

### Encouraging more mass catering providers to source locally

The Region is determined to encourage more mass catering providers to source locally and do their bit for the region’s economy. It is currently working on a pilot scheme with 30 colleges to boost local supply chains and give farmers new outlets for their produce. The ultimate target is to have these providers sourcing **100% French produce, 50% regional produce, and 20%**

### produce certified as organic or to another quality standard.

The Region is spearheading a **regional local sourcing in mass catering observatory** in partnership with central government (DRAAF) and the Regional Chamber of Agriculture. It is also involved in, and supporting, the “Local Network” in each department – a forum for discussion and dialogue on local sourcing issues and challenges.

### At the European level

Enabling regional businesses to benefit from EU programmes and raising local concerns at the European level.

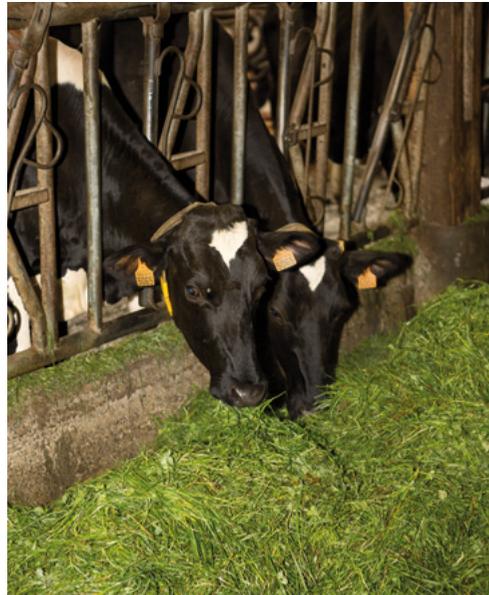
The European Union has a decisive role to play in supporting agriculture. For that reason, the Region has invited the Regional Chamber of Agriculture to join forces with its Brussels office. A multi-disciplinary working group has been set up to make the case for the region's interests during talks around the new Common Agricultural Policy. The Region also spearheads a network that aims to mobilise EU funding for R&D projects, especially those focusing on digital technologies.

### Around the world

Growing the international market and promoting the region's expertise.

As a major player in agriculture and the food-processing industry, exporting is vital to the Pays de la Loire Region. That is why the Region's economic strategy and international roadmap for 2016-2021 focuses on "hunting as a pack", featuring tools and platforms that emphasise collaboration with Food Loire, CCI International, the Regional Agency and inter-branch organisations. Some €5.4 million has been assigned to these initiatives each year, and they will undergo annual reviews.

**In late 2016, the Region ran an awareness campaign, entitled *Eating regional is vital, to showcase the diversity and excellence of the region's agricultural produce.***



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**Yannick Yobé,**  
Chef, François Arago  
vocational college,  
Nantes

“

*We were more than happy to take part in the Region's initiative because we understand the importance of local sourcing and promoting produce such as Ancenis poultry, Val de Loire pork, organic produce processed in sheltered workshops, and bread baked with local flour. The aim is to forge connections across sectors, foster discussion about pricing and working methods, and be open and transparent - to weigh up mutual constraints and look ahead to the future. It's a process that takes time, but it's extremely gratifying to share our expertise and pass on our knowledge to students.*

”

## 3. PROTECT

### Shielding farmers from geopolitical, economic, food safety and climate shocks

**Jobs in agriculture:**  
4% of the region's  
workers

**Food-processing:**  
24% of the region's  
industrial workforce

**9% of fishermen**  
working in  
mainland France

**Shellfish farming:**  
11.4% of shellfish  
farmers working in  
mainland France

#### Lightening the regulatory burden

*Making life easier for all*

Regulations play an important role in keeping people safe and protecting the environment and society. Yet a growing body of often inconsistent regulations, coming from Europe then transposed into French law, is undermining farmers' ability to remain competitive. Although the Region does not set its own standard and regulations, it is determined to make those processes for which it is responsible as simple as possible. For example, it has doubled the amount of time given to farmers to submit proposals under the Farm Competitiveness and Adaptation Plan. And it is also working elsewhere to lighten the regulatory burden, lobbying its partners in Brussels and working with Régions de France to do the same at home.

#### Creating certainty for farmers and fishermen

*Helping to contain the threat of climate hazards.*

The Region is helping farmers and fishermen cope with the consequences of external threats, especially climate hazards, through schemes such as harvest insurance and emergency assistance.

“

**Emmanuel Bertaud,**  
Shellfish farmer,  
South Vendée

*The Region granted a two-year repayment holiday on interest-free loans taken out in 2014, and pays our interest on our commitments and loan guarantees from BPI. Without this emergency support package, the local mussel farming industry could not have survived. Many businesses would have gone bust. The Region also plays a key prevention role through its shellfish loss research programme. The support we receive is instrumental during these tough times.*

”

## 4. UNITE

### Bringing the entire industry together

70% of the region's land used for farming

A common goal: to foster collective projects that serve all sectors of the industry.

€6 billion in turnover across the agricultural sector

#### Fostering dialogue within and between sectors and promoting collective governance

Maintaining the collaborative spirit that began with the consultation process.

The spirit of collaboration that underpinned the region's Food Industry Strategy will continue in the years to come, with an annual inter-sector meeting.



Guy Emeriau,  
Head of Meat and  
Poultry, Système U



*As a retailer, we have a first-hand insight into consumer trends and can adapt our offering accordingly. It's also useful to pass on the information we hold about changing demands and sensibilities to farmers, so they can do the same.*

*It will take an industry-wide effort to serve demand across all markets. We shouldn't settle on one particular consumption and production model, but instead develop a wide, segmented range of offerings at different quality and price points. It's in the whole industry's interest to have these conversations.*



#### Coordinating group work

The Region, working with its partners and with government in particular, will grow its presence in regional governance bodies. It will meet with agricultural unions and inter-branch organisations, step up its support for the Regional Association of Food-processing Industries (LIGERIAA), engage in dialogue with the departments, other regions and European networks, and make its voice heard in decision-making bodies such as general meetings.

#### Bringing farmers and consumers closer together

##### Embedding produce in the community

The fact that consumers are taking a growing interest in food from farm and sea is an opportunity to embed local produce in the community. The Region is determined to encourage this movement, particularly by supporting farm and wine tourism. It supports farms looking to invest in tourism initiatives and facilities, as well as events that showcase local produce.

The Region is also committed to supporting Local Food Projects (PATs) across the Pays de la Loire Region – a method, laid down in law, to strike the right balance between supply and demand in a given area. Moreover, the Region is contributing to preparations for Nantes Métropole's PAT.



# AGRI

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 Région  
**PAYS DE LA LOIRE**