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Oilseed and protein crop sector
France's strategy for the development of protein-rich plants

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Field crops and potatoes : 2023 harvest

46% of agricultural area is dedicated to field crops (cereals, oilseeds, proteins, industrial plants and potatoes)

72 % of fieldcrops are cereals

And about 20% are oilseed and protein crops

The total production of field crops is about 73 million tonnes, of which 35 million tonnes are wheat.

Not including non-food crops	Land area	Yield	Production
	thousand hectares	*100kg/ha*	*million tonnes*
Total cereals	**8,819**	**74**	**64.9**
of which: soft wheat	*4,762*	*74*	*35.1*
durum wheat	*236*	*55*	*1.3*
barley, six-row barley	*1,816*	*68*	*12.3*
maize	*1,315*	*99*	*12.9*
Total oilseeds	**2,372**	**29**	**6.8**
of which: rapeseed	*1,343*	*32*	*4.3*
sunflower	*822*	*25*	*2.1*
soybean	*158*	*25*	*0.4*
Total protein crops	**354**	**28**	**1.0**
of which: field peas	*152*	*32*	*0.5*
All oilseed and protein crops	**11,557**	*///*	**72.8**
Industrial plants	**632**	*///*	*///*
of which: industrial beet	*381*	*804*	*30.6*
sugarcane	*35*	*626*	*2.2*
Potatoes	**204**	**422**	**8.6**
of which: certified seed potatoes	*21*	*307*	*0.6*
starch production	*17*	*434*	*0.7*
food potatoes	*167*	*429*	*7.1*

Scope: France.
Source: Agreste - Annual Agricultural Statistics

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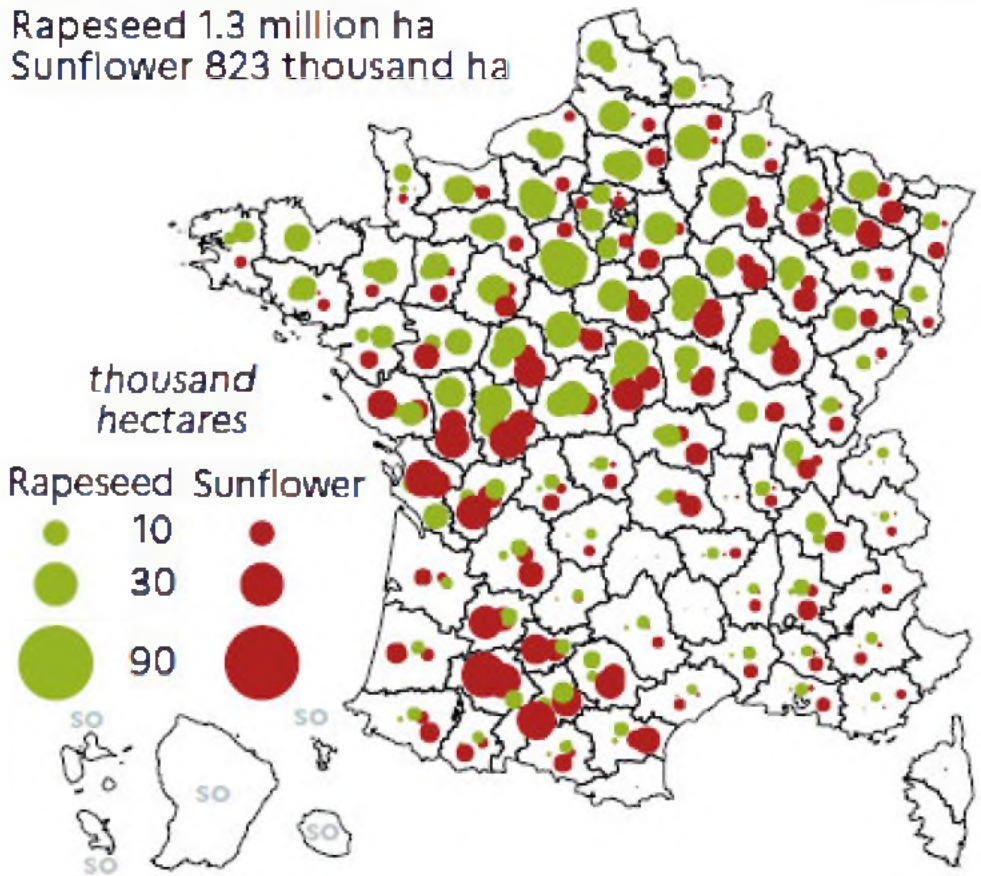
Oilseed and protein crops

Oilseeds

Total aera France:
Rapeseed 1.3 million ha
Sunflower 823 thousand ha

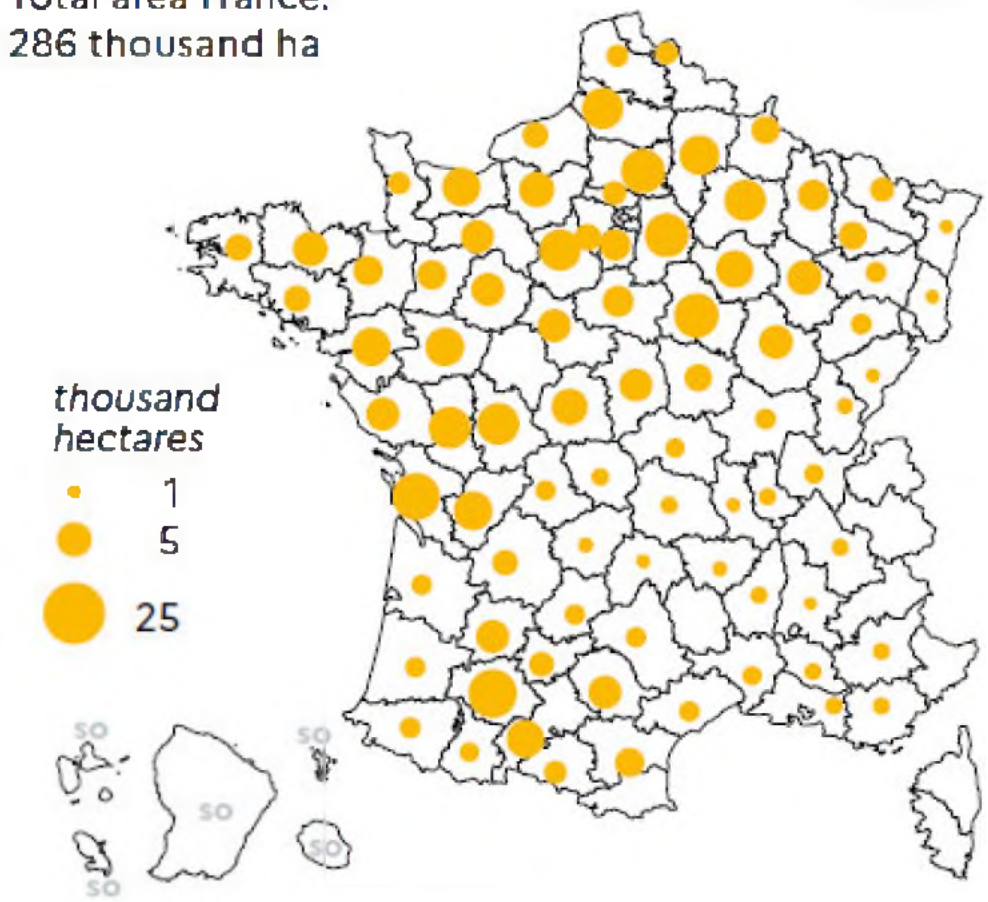
2023P



Protein crops

Total area France:
286 thousand ha

2023P



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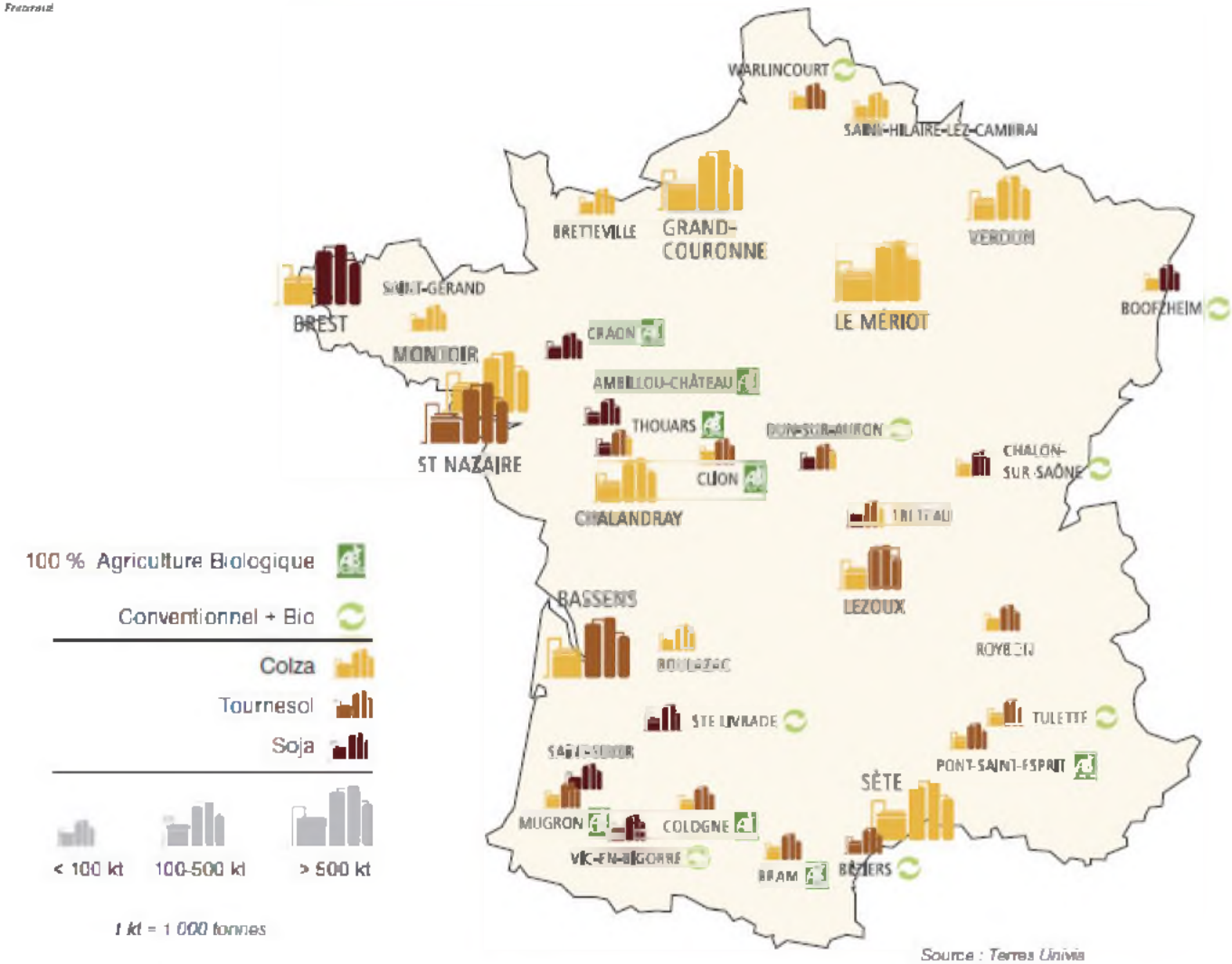
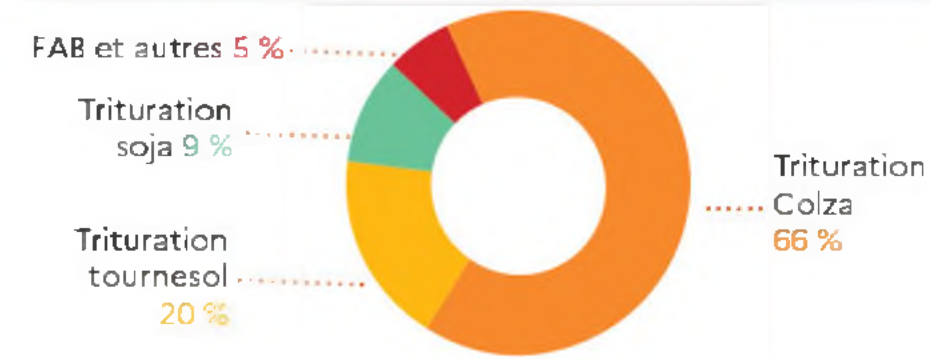
Oilseed crushing industry



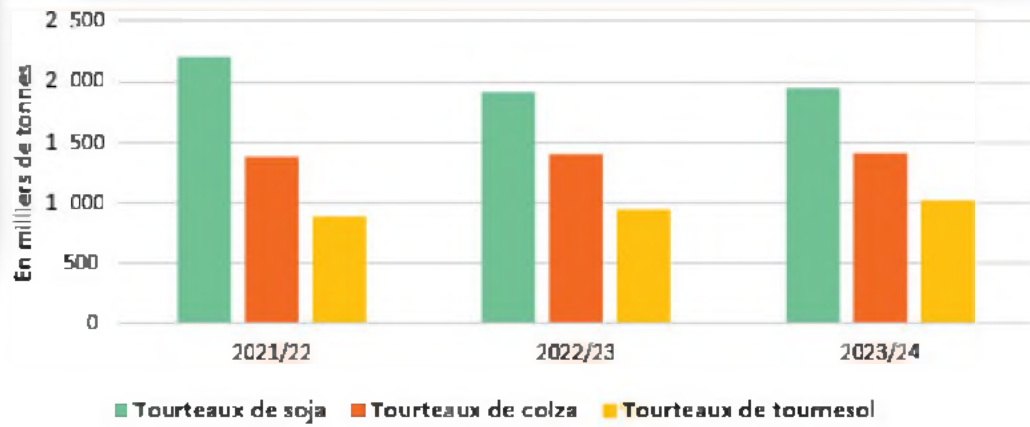
Source : Terres Univia

Répartition des volumes de graines oléagineuses (hors lin oléagineux) transformées (en moyenne quinquennale 2019/20 – 2023/24)



Source : FranceAgriMer

Consommation des tourteaux français par les Fabricants d'Aliment du Bétail (FAB)



Source : FranceAgriMer

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The need to increase protein rich plants self-sufficiency

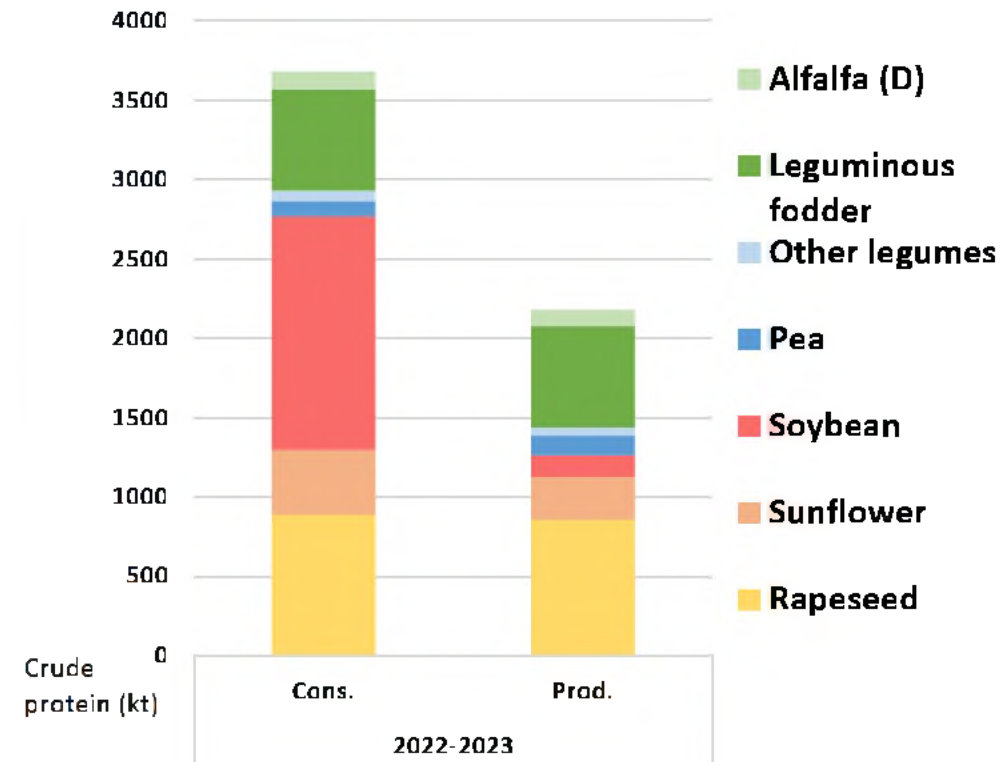
French self-sufficiency is about…

- 77% regarding all sources of protein for animals (including grass and fodder) (76% at the UE level in 2023)
- 50 to 60% regarding protein-rich materials only (oilseeds and pulses) (31% at the UE level in 2023)

The main dependance concerns soybeans (seeds and meals) with imports reaching about 90% of consumption. Meanwhile, self-sufficiency is higher for pea (>100%), fodder (100%), rapeseed (96%) and sunflower (67%).

Different constraints for legume production

- **Agronomic**: Managing climatic hazards and increasing sanitary incidents; genetic selection; specific equipment required for the cultivation of certain legumes, etc.
- **Economic**: Low competitiveness of legume crops compared to cereals and industrial crops; lack of market opportunities and mismatch between supply and demand, etc.
- **Logistic**: Challenges related to collection with small volumes, sorting, storage due to high segmentation, and lack of optimization in the shipment flow of harvested crops, etc



Sources :

Ceresco, 2021. Freins et leviers logistiques au développement de systèmes de culture diversifiés et riches en légumineuses

Meynard, 2013. Freins et leviers à la diversification des cultures. Etude au niveau des exploitations agricoles et des filières

Bilan d'approvisionnement agroalimentaire 22-23 https://agreste.agriculture.gouv.fr/agreste-web/disaron/Cho2417/detail/

https://data.europa.eu/data/datasets/eu-feed-protein-balance-sheet?locale=en

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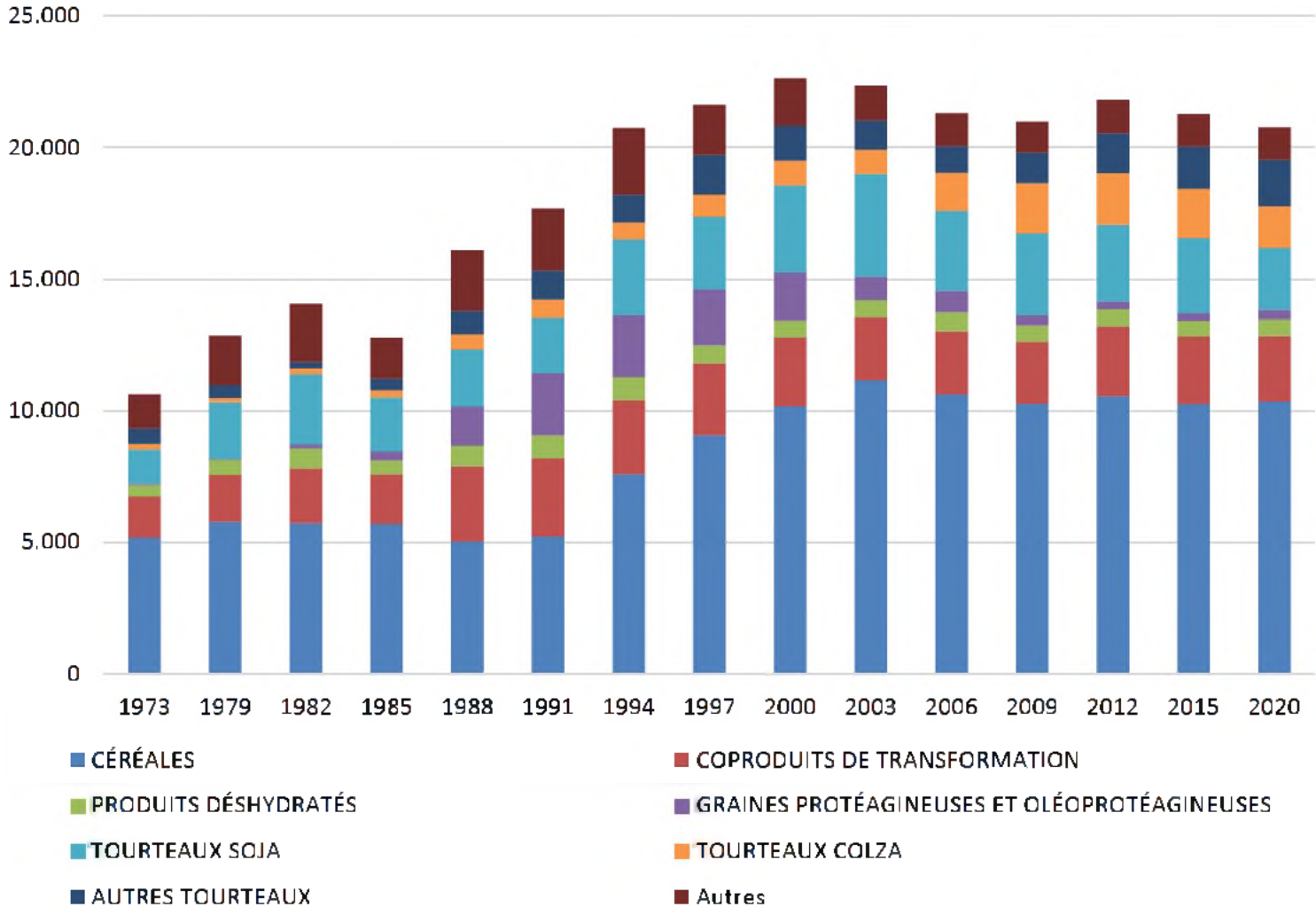
Rapeseed and sunflower meals as substitutes of imported soybeans

Raw materials used in compound feed manufacturing (kt) in France



- The decrease in imported soybeans was made possible by increased production of other oilseed meals in France, in particular for ruminants
- Increases in protein-rich fodders, legumes, and oilseed meals are complementary solutions to enhance European protein self-sufficiency and ensure price competitiveness of protein sources
- The French national strategy for the development of protein-rich crops thus includes both oilseeds and legumes.

Source: Agreste SSP ; Agrosynergie, Areté, Cereopa, AFZ, 2023. study of feeding strategies to diversify the protein sources used in different livestock production systems in the UE. European Commission

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A strategy to gain protein autonomy with a food systems approach

3 strategic priorities

To reduce dependence on imports of protein-rich materials, particularly soybeans imported from third countries.

To improve food autonomy for French farms at the farm, territorial, and sectoral levels

To increase the production and consumption of protein-rich plants in human food.

7 axes for a 10 year strategy

- To lead the transition towards diversified cropping systems rich in legumes.
- To strengthen the food autonomy of farms and the use of fodder proteins.
- To support crop-livestock synergies at the sectoral and territorial levels.
- To position France as a leader in protein-rich plants for human consumption.
- To mobilize resources for research, innovation, and training.
- To promote a strategy at the European level and develop international partnerships.
- To monitor and evaluate the strategy

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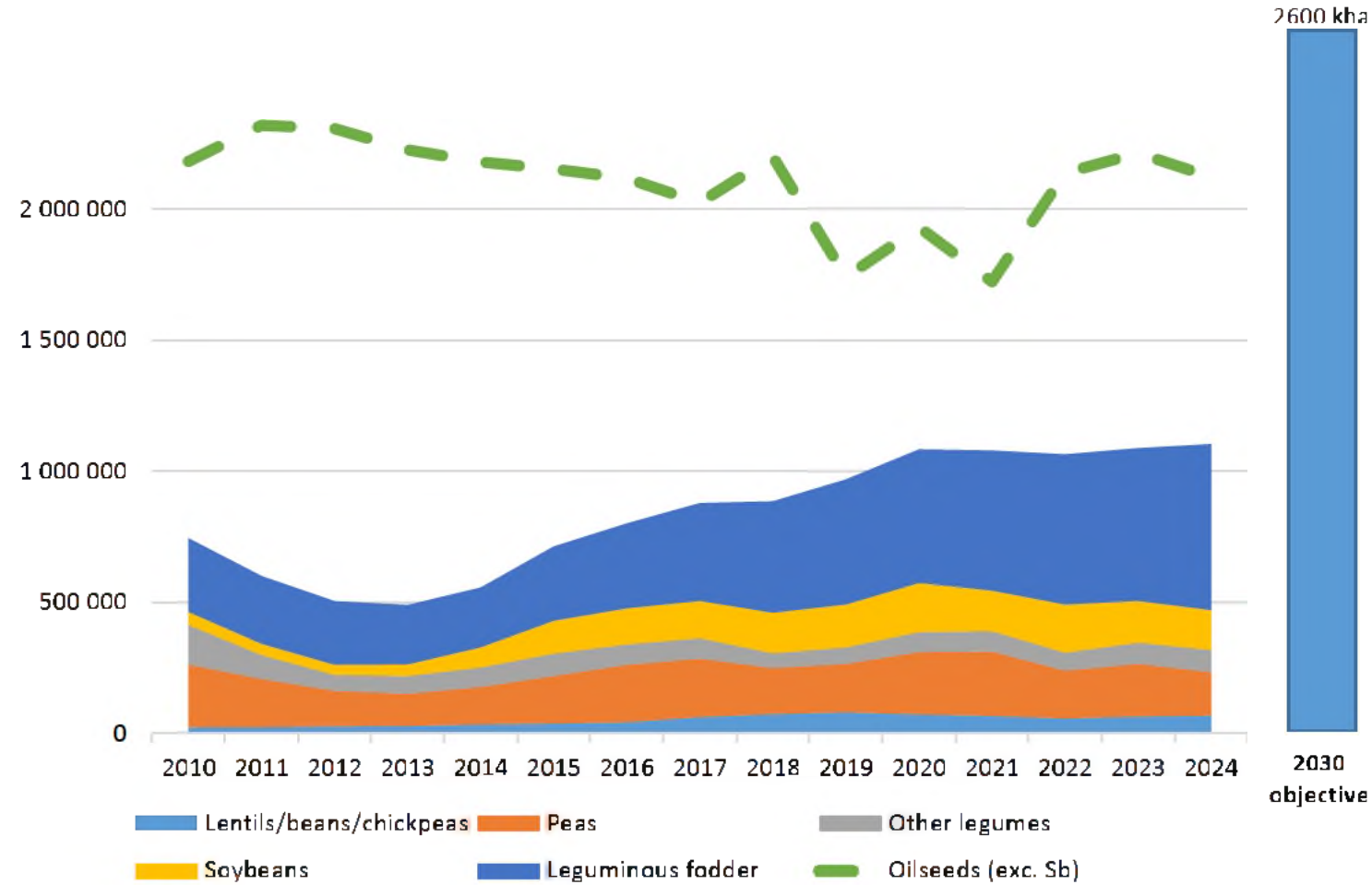
Ambitious goals for legumes and oilseeds crops

The objective is to reach 2,6 Mha of legumes by 2030 while maintaining approximately 2 mha of oilseeds

- This would bring legumes areas to 10% of the total Utilized Agricultural Area (UAA). All legumes are intended to contribute to this growth.

- One of the key transformations for arable crops in order to reach GHG emissions reduction targets (decrease of fertilizer use)



Source : Agreste

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Developing efficient and equitable value chains

Increasing supply : coupled support
and operational programs
for oilseeds and legumes

Industrial capacity :
Investments in the downstream stages of oilseeds and legumes value chains

Demand :
R&D on food and feed
National food program
Collective catering
Territorial food projects…

- Those policy instruments aim to overcome several economic, logistical, and organizational barriers by supporting the structuring of **legume and oilseed value chains**

- Enabling agricultural value chains to engage in a **transformation process, both economically and socially** (food sovereignty, competitiveness), as well as **in environmental and health areas** (ecological transition, adaptation of practices to climate change, development of alternatives to pesticide use, reduction of greenhouse gas emissions and water usage, animal welfare, and biodiversity preservation…)

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Oilseeds and legumes Operational Program

- Slow implementation at the initial stage : difficulty in meeting the recognition thresholds for farmers organizations (0.5 full time equivalent position ; 500 hectares ; 50 farmers), with sufficient marketed production, and at least 65% of the production delivered to a farmer organization.
  - Oilseeds acted as a lever in achieving these thresholds, thereby enabling the structuring of the oilseed and protein crop sectors
  - Value of marketed production : 30% of oilseeds and 70% of legumes

- 4 farmers organizations in 2026
- A forecast budget of about 2 M€ in 2026

- **Main activities** : Advisory services to optimize crop management practices ; Planning and monitoring of harvesting operations to ensure the supply of raw materials to processing plants, as well as on-farm trials and experiments with farmers ; Promotion and communication

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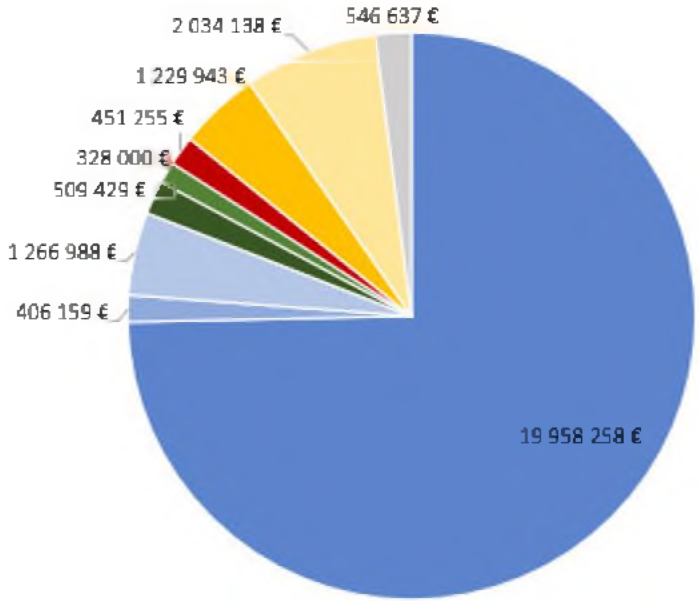
Forecast Budget for the Dried Fodder Operational Program (2024–2026)



- 1.1) Planification et organisation de la production, adaptation à la demande Concentration de l'offre. Récolte, stockage, préparation commerciale, conditionnement. Optimisation des coûts de production.
- 1.2) Production durable d'énergie
- 1.3) Investissement corporel ou incorporel destiné à rechercher ou à développer des méthodes visant à diminuer l'impact sur l'environnement, notamment du matériel spécifique à la réduction des produits phytosanitaires/zoosanitaires
- 2.1) Acquisition de connaissances techniques en lien avec les méthodes de production et commercialisation
- 2.2) Conseil technique et diffusion de connaissances aux producteurs notamment liées à l'évolution des systèmes de production et aux nouveaux outils, aux pratiques alternatives et aux moyens de lutte contre les nuisibles et/ou les maladies et l'adaptation
- 2.3) Conseil technique et diffusion de connaissances en lien avec les conditions d'emploi, les obligations des employeurs, la santé et la sécurité au travail
- 4.1) Etude de marché, prospections commerciales, tests produits
- 4.2) Création et évolution de la marque d'OP et/ou du logo ; Création de nouveau produits et coûts liés à la présentation de ces produits
- 4.3) Publicité, promotion et communication
- 6.1) Traçabilité des produits et systèmes de certifications
- 6.2) Agréage et contrôle de la qualité des cahiers des charges en production
- Frais de gestion

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2028 – 2032 CAP : an opportunity to increase European protein self-sufficiency

- The French strategy on protein crops relies on a **food-system approach, mobilizing different policy instruments at all levels of the value chains**.

- **Operational programs** represent a promising tool for structuring oilseed and legume crop value chains, enabling a diversity of actions to reinforce production through technical support to optimize crop management strategies, risk management, experimentation, promotion and communication, and the development of long-term marketing strategies to maintain supply-demand equilibrium.

- Oilseeds (excluding soy) account for 35% of the supply of protein-rich plant materials to French livestock farms (average 2018–2023), and 22% at the European level (2023–24), with self-sufficiency rates of 72% for rapeseed meals and 53% for sunflower meals.

- These crops contribute to European supply both in protein for feed and in biofuels. Their utilization represents a particularly suitable response to European protein autonomy, given the ability of oilseeds to substitute for imported soybean meals, particularly for cattle herds. Their integration would also provide a leverage effect for structuring legume production.