



17 December 2024

France: the report on agriculture by The Shift Project – a missed opportunity

In France, agriculture has long been considered as a **flagship sector** of the French economy. Proud of its position as the **second-largest agricultural exporter** at the beginning of the 21st century, and of the strength of its **agri-food industry** with leading companies among the most powerful global multinationals, France has recently witnessed – like Europe – a deep agricultural crisis, the first signs of which could be seen in the early days of 2024 [\[read\]](#). This crisis, of an economic, environmental, and social nature, is the expression of a set of interconnected systemic crises that the world must address (climate, water, biodiversity, land, economic inequalities, health).

It is in this difficult context that French agriculture will have to change.

Like elsewhere, this transformation will not be painless, especially since the global food system is undergoing a transition whose characteristics suggest that it is leading in a direction and towards a world that is not so desirable [\[read\]](#).

The Shift Project's prospective work: objectives, method and main outputs.

Last November, [The Shift Project](#) (TSP)¹ published a report [\[read in French\]](#) that 'sought to survey the issues in the sector in order to account for the state of ongoing research and the discussions' so as to 'plan an ambitious transformation' to 'enhance its resilience and national agricultural sovereignty, and thus preserve its ability to feed the population while ensuring the economic viability of farms'.

TSP analyses 'the energy, climate, and ecosystem limits' of the French agricultural system (dependencies, consequences, and impacts), and reviews the potential 'levers for transforming the agricultural system' before considering **four scenarios** by 2050:

¹ Established in 2010, "The Shift Project is a think tank that works towards an economy freed from the carbon constraint." It aims to "inform" and "influence" and "is supported by economic leaders [\[read in French\]](#) [...] and relies on a network of several thousand volunteers grouped within an association."



1. Priority to better agricultural and national food autonomy.

This scenario aims to secure the food supply of the French population by depending as little as possible on inputs and imported food, while also reducing greenhouse gas (GHG) emissions.

2. Priority to a greater national energy independence.

This scenario aims to ensure the supply of a maximum of agricultural biomass for energy purposes after meeting national food uses, while cutting GHG emissions.

3. Priority to contributing to international food security by maintaining French export capacity².

This scenario aims to ensure the production of a maximum amount of exportable food biomass, after securing national food uses, to give France a geostrategic role and combat hunger worldwide while reducing GHG emissions.

4. Scenario of conciliation.

This scenario aims to develop a form of compromise between the different strategic priorities of the first three scenarios.

Each of the scenarios is defined by **assumptions** about the evolution of cultivated areas, herd sizes, and the importance of various farming practices, as well as changes in energy production and consumption.

The **results of the scenarios** are described by

- the level of energy consumption and production,
- the level of availability to meet national food needs (human and animal), of GHG emissions, of resilience in the agricultural sector evaluated on the basis of energy efficiency, reduction of nitrogen fertiliser use, and livestock efficiency,
- the contribution to overall societal resilience. This is measured by the level of sustainable impact on ecosystems to preserve biodiversity (assessed through permanent pasture area, pesticide consumption, agroforestry development, and crop rotation diversification), and ‘**sobriety**’ in water use (maintaining control over the increasing water demand for irrigation).

Finally, the report concludes with a series of recommendations for public authorities, territorial stakeholders, and farmers.

² This denotes a rather obsolete way of envisaging food security that prioritizes - or even gives exclusivity to - the "availability" dimension of food security. It is now well established that to combat hunger, it is not sufficient to produce more food. It would have been more appropriate to write « contributing to the supply of food on the world market » [\[read\]](#).

The strong points in TSP's work

Three strengths can be identified by readers.



First strength: data

The first strength of TSP's report is the **impressive amount of detailed data** on the agricultural sector presented in an easily accessible form (tables, diagrams and maps). This is a wealth of information on French agriculture that describes its evolution over several decades using key variables (number of farms, cultivated areas, livestock numbers, economic results, etc.). The study team has made a commendable effort to collect and organise the information in a format directly usable by those interested in the agricultural sector of France.

Second strength: the point of view of farmers

The second strength of TSP's report is the use of the results from a **consultation process** involving **7,700 French farmers** over a period of 6 months [[read in French the consultation report here](#)]. These results provide valuable insights into what farmers think about certain agricultural practices and the constraints hindering the adoption of sustainable agricultural practices.³ It is hoped that this kind of consideration will be integrated into future agricultural surveys conducted by the government.

Third strength: actors' recommendations

The third strength of TSP's report is the set of recommendations found in the last part of the report, which clearly emerges from **consultations conducted** with professional organisations, technical institutes, various other institutions, associations, as well as with individual producers and their organisations.

The weak points in TSP's work: huge conceptual flaws

Despite the wealth of information it presents, TSP's report suffers from a **narrow conception** which constitutes a fatal flaw, preventing it from reaching convincing conclusions.

Four main weaknesses stand out when reading the report.

³ Unfortunately, the very brief description of the method used, particularly regarding the constitution of the survey sample, and the fact that the survey was conducted online (without specifying response rates) does not allow to assess the representativeness of the results, which nonetheless provide interesting indications.

First weakness: describing the agriculture sector in isolation

Regrettably, the study **isolates the agricultural sector from the rest of the economy**. This is a consequence of the general approach adopted by TSP within the framework of its Plan to Transform the French Economy (Plan de transformation de l'économie française – PTEF), which consists in considering each of the main sectors of the economy in isolation [[read page 1 in French](#)].

This method has become a curiosity nowadays, when most economic work is done based on a **systemic approach** allowing to grasp reality from production (and its upstream) down to consumption. Thus, there is hardly any recognised work that does not integrate the analysis of agriculture in the broader context of a **food system** starting from upstream of agriculture (production of inputs and equipment used by agriculture) down to consumption, passing through agricultural production, agro-industrial processing, trade, and distribution. This approach is now generalised, not out of a taste for complexity, but because it is firmly established that what happens upstream and downstream of agriculture (within the framework of major agri-food chains, notably) has a **profound influence on the possibilities and directions of change** actually existing in the agricultural sector.⁴ Reality is complex [[read](#)] and analyses must take this into account in order to produce convincing conclusions and recommendations that have a chance of being applied and effective.

The cost of the obsolescence of the method adopted is that it remains **descriptive rather than analytical and explanatory**, and is condemned to make, in various scenarios, hypotheses that appear rather arbitrary and whose plausibility is not proven, especially as they entirely neglect the very close relationships between farmers and big powerful upstream and downstream players who hold most of the **power** [[read](#)] and are continually transforming agriculture and food in a direction that cannot be overlooked in ambitious prospective work [[read](#)].

In TSP's report, reality is therefore schematised and turned into a kind of giant clock the manufacturer of which has omitted endowing it with the indispensable power source to make it operate.

Second weakness: an almost exclusively techno-economic approach

One of the consequences of the first weakness is that TSP can only rely on technological levers to create change. Thus, all **transformation levers** are of a technological nature (see table pp. 114–115), except perhaps the '**levers of socio-economic resilience**', although the resilience referred to is also described in purely technical terms...

Regrettably, the report **does not provide any indication of what determines the adoption of one technological solution rather than another**. This may be

⁴ Interestingly, when the report mentions relations between agriculture and other sectors (section 4, p. 57), the sectors listed include construction, transport, data, energy, town-planning and upstream industries. No mention of food industries !

because analysing factors of adoption would require expanding the study beyond just technical advantages (to address economic and social issues) and beyond the agricultural sector in the strictest sense.



Moreover, given the central role of technology in the solutions proposed by the report, one would have expected at least some considerations on agricultural research, its stakeholders and their interests, as well as the factors that have influenced their past evolution and that would sketch out an idea of their future evolution.

Finally, the scenario descriptions and their results are based on a set of **purely technical variables**, some of which (especially those attempting to assess the resilience of biodiversity) are rather

questionable. Worse, no indication is given regarding the economic aspects, particularly regarding prices, value added, agricultural income and farm structure, which are rightfully presented as important variables in the initial descriptive part of the report, while '**economic viability of farms**' is a stated objective of the work undertaken by TSP.

Nothing also on **investments** (and yet, present investments shape the future [\[read\]](#)), nor on **finance** which, since the 2007–08 crisis, has been transforming global agriculture (with France being no exception) [\[read\]](#). Nothing on anything that could hinder the transformations of the agricultural sector by limiting the freedom of action of its potential actors (e.g. indebtedness and various contracts linking producers to other actors, the issue of generational renewal of farmers, etc.).

These considerations lead us to the third weakness.

Third weakness: where are the actors of agriculture?

For TSP, agriculture seems to consist only of farms, fields, plants, animals, and technologies. Where are the humans? Where are the **farmer organisations** that organise the anger of producers, and some of which co-manage agriculture with the state in close collaboration with upstream and downstream companies, whether cooperatives or not? In the 242-page report, the word '**syndicat**' (farmer unions) appears fleetingly only three times and 'cooperatives' eight times. As for the **upstream and downstream actors** (input suppliers, agribusinesses, traders, and consumers), they are, of course, absent due to the already mentioned weakness.

Not only is agriculture alone in the world, but it is also depopulated and reduced to a simple mechanism imagined by engineers, lacking what makes its life. A technocratic world where politics does not exist.

The actors finally appear in the report when recommendations are directed towards them... (or rather that they direct to each other).

Fourth weakness: A tenuous link between the analysis conducted and the recommendations made

At the time of formulating recommendations, the **real world suddenly intrudes** upon the report. All of a sudden, there is talk of political inconsistencies, regulations, international competition, securing outlets, new skills, and even research! Also mentioned, at last, are agricultural chambers, cooperatives, and farmer associations.

One unexpectedly finds a long string of recommendations that, taken individually, have their own merits, but are quite difficult to connect to what is stated in what should have been diagnostic sections and in the scenarios descriptions that form the body of the report. To be strongly justified, they should logically stem from the analysis that was conducted.

In fact, it is quite likely that they primarily originate from the consultations organised by TSP that give them some credibility, being demands from the individuals and organisations that have formulated them.



Conclusion: a missed opportunity

The four weaknesses of TSP's report do not diminish its merit as a **valuable source of information on French agriculture**. Yet, they do undermine the credibility of the recommendations made, due to a lack of realism in the analysis,

of coherence in the conclusions, and especially in the view of **the absence of consideration of some major drivers of change at work in agriculture and food**.

Given the authors' level of expertise and the richness of the references cited in the report, such an oversight could not be unintentional.

There is disappointment when reading this work, as one would have hoped for a thorough reflection on French agriculture and food sector, particularly if the importance of the resources mobilised is considered.

Were similar oversights to occur in other sectoral TSP reports, doubts would reasonably arise about the relevance of the French Economy Transformation Plan (PTEF) resulting from their synthesis.

There is amazement and dismay over the very disappointing outcome of an effort which, according to TSP, engaged over 300 contributors, consulted with more than 7,000 farmers, 150 organisations, and mobilised substantial financial resources, all under the direction of a scientific committee and a group of producers.

All this for that... For what purpose?

We do hope that the reports on other sectors will be of a different quality! Yet, unfortunately, there are good reasons to be concerned.

to know more:

- Blin, K. et al., [La grande consultation des agriculteurs](#), rapport d'étude, 12/12/2024, The Shift Project, 2024 (in French).
- Corpel, C. et al., [Pour une agriculture bas carbone, résiliente et prospère – Pour une transformation ambitieuse du secteur – Synthèse novembre 2024](#), The Shift Project, 2024 (in French).

Selection of past articles on [hungerexplained](#) related to the topic:

- [Measuring reality is quite complex - Two illustrations](#), 2024.
- [European farmers' protests: Simple crisis or signal of a necessary transition?](#) 2024.
- [The “food and agricultural transition” is ongoing - Nine changes tell us to what kind of world it is leading us](#), 2023.
- [Governance, consumer awareness, better income and wealth distribution, and technological, social and institutional innovations will be key in achieving a desirable future, says FAO](#), 2022.
- [Private economic power in food systems and its new forms](#), 2022.
- [Investment in agriculture](#), 2022.

and other articles grouped in thematic pages on '[Future of food](#)' and '[Finance](#)'.