

MOND'Alim 2030 : the actors of food system globalization

The *MOND'Alim 2030* exercise led by the Centre for Studies and Strategic Foresight is aimed at characterizing the current phase in globalization and documenting the main dynamics at work. Food systems result from multiple interactions between private and public actors: national governments, international organizations, multinational companies, NGOs, organized civil society, among others. The present *Analysis* isolates three main trends involving those actors: their increasing number, the growing complexity of their interactions and the hybridization of their statuses.

In the *MOND'Alim 2030*¹ publication, the conception of food system globalization is that it is the outcome of the intentions and strategies of interdependent actors between which power relationships exist. Power-related phenomena offer good predictive capacity: knowledge of who holds power today provides indications as to what the world will be tomorrow.

The term “actors” as used here refers to individuals, groups, organizations and institutions capable of interpreting the situations they are experiencing and developing strategies to achieve their goals by making use of the resources available to them or creating new resources. *MOND'Alim 2030* has focused not on the actors *in* globalization, but on the actors *of* globalization, that is to say those able to exert direct influence on the phenomena of globalization: national governments, international organizations, multinational companies, non-governmental organizations (NGOs), among others.

The present publication has highlighted three broad trends involving the actors shaping food system globalization: a substantial increase in their number (e.g. firms, NGOs, small farmers' movements, institutes, foundations), the growing complexity of their interactions, and lastly a trend towards hybridization of their statuses,

with actors intervening more and more frequently beyond the initial boundaries of their legitimacy and competency. These three trends all help redefine the roles of each and determine how food systems are changing.

The present note describes these broad trends and their implications looking forward by addressing five main categories of actors one by one: national governments, international organizations, multinational companies, NGOs and, lastly, major cities. For more details on this, interested readers may refer to chapter 5 of *MOND'Alim 2030*.

1. National governments: diversification of food security strategies and new global agricultural powers

For many governments, food security, as a key factor for political stability, will still be a major issue tomorrow. It is estimated that 800 million people do not have sufficient food at the present time, largely in South Asia, Sub-Saharan Africa and, to a lesser extent, East Asia. Certain regional trends are moving in the direction of a worsening of these concerns in the years to come: according to INRA (2015)², imports cover 40% of food requirements in the North Africa - Middle East region, a percentage that could reach 70% in 2050. More generally, instability in

international markets, pressure on resources and the effects of climate change are other factors that will increasingly affect food security.

In this context, the countries directly concerned are adopting diversified strategies for securing supplies that combine a range of aspects, among them development of production, food stocks, increasing the number of procurement sources, negotiation of preferential relationships and efforts to find resources beyond their national borders. Such diversification of strategies relates to the limits of conventional food self-sufficiency policies based solely on domestic production, the financial and environmental costs of which prove to be high (e.g. Saudi Arabia, China), and which often do no more than replace dependence on products by dependence on inputs.

1. Centre d'études et de prospective, 2017, *MOND'Alim 2030 : Panorama prospectif de la mondialisation des systèmes alimentaires*, Paris, La Documentation française, 230 pages, <http://agriculture.gouv.fr/mondalim-2030-panorama-prospectif-de-la-mondialisation-des-systemes-alimentaires>.

2. Le Mouel C. *et al.*, 2015, *Le système agricole et alimentaire de la région Afrique du Nord - Moyen-Orient à l'horizon 2050 : projections de tendance et analyse de sensibilité*, rapport final de l'étude réalisée pour Pluriagri, INRA-DEPE & INRA-SAE2.

These food security concerns will be expressed against the backdrop of a reconfiguration of agricultural and agrifood powers. The positions of the United States and the European Union are already challenged by the emergence of producing countries exerting influence on international trade flows – China, Brazil, India, South Africa and Russia most notably – and this is a trend that will be confirmed over the period to 2030. Moreover, the rising demographic and economic importance of the “major countries to be fed” confers power on them as buyers on international markets, as is illustrated by China and soybean imports (cf. figure 1). More fundamentally, power will increasingly come from a range of sources: surpluses, solvent markets, infrastructures, diplomatic networks, R&D, etc. (cf. figure 2).

For these major agricultural powers, farming will continue to be a tool for influence

in the diplomatic arena and international negotiations. Although there are signs of the possible appearance of other rising agricultural powers, Turkey and Morocco in relation to Africa, for example, it is nevertheless difficult to imagine that other countries could achieve an equivalent role by 2030 (Box 1).

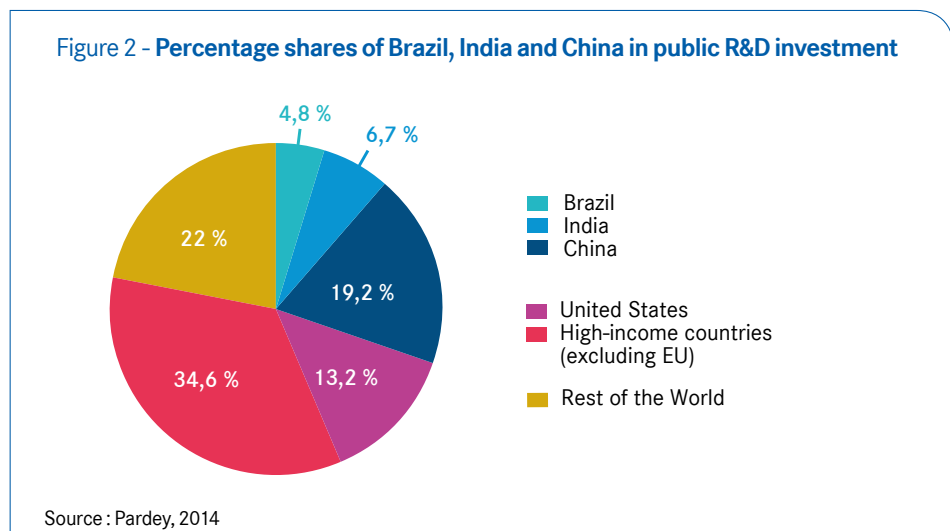
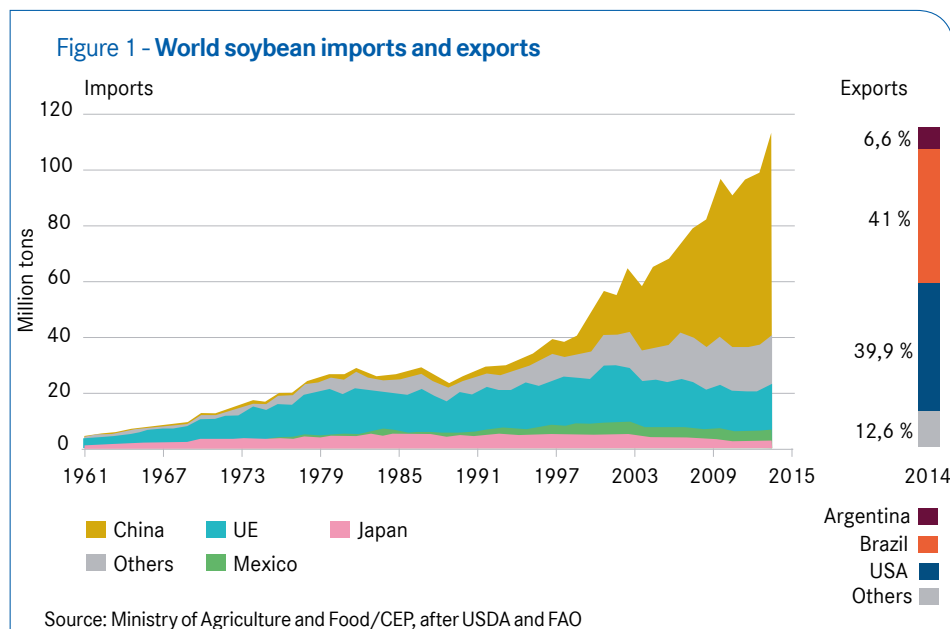
Lastly, in a context in which the actors of globalization are more numerous and their interactions are also increasing in number, national governments are adding to the ways in which they can take action and the instruments they can bring to bear in food systems. An illustration of this phenomenon is to be found in the promotion of sustainable value chains by the Netherlands (cf. figure 3): the Dutch strategy has involved a wide variety of actions ranging from enhancing awareness in international organizations and other countries, to research funding, and including

public-private partnerships, publication of information guides, holding public debates, and so on. This diverse range of instruments allows the Netherlands to take advantage of actors’ interrelationships and to exert greater influence on international decisions.

2. International organizations: competition, complementarity and a search for legitimacy

By their very nature and their missions, the international organizations make a significant contribution to documenting, understanding and the shared expression of agricultural and food issues at global level. They produce analyses and put forward proposals they seek to objectify by publishing reports that gather together facts and trends collected from everywhere around the world, academic references and ways forward for action. These core tasks, which have characterized the international organizations since the Second World War, are likely to continue into the future.

The major presence of such agricultural and agrifood issues on the international political agenda in recent years is even tending to heighten other actors’ expectations of those organizations: food and sanitary crises, the food challenge for the period to 2050, combating the effects of climate change, soil erosion, deforestation, rural poverty, and so



Box 1 – Africa: an agricultural power by 2030?

The African continent possesses resources for the future: rising agricultural production, exploitation of just 2% of its renewable water resources, 50% of unexploited global fertile land and a large urban population with increasing purchasing power. The expansion in the investments of western and emerging countries provides confirmation of its attractiveness. But there are challenges to overcome: a lack of infrastructure and logistics systems, low agricultural yields, land tenure issues, poorly organized supply chains, marginalization of rural areas, limited opportunities for rural employment due to population growth, and political insecurity and instability. Given this very mixed situation, it is unlikely that the African continent will be the new agricultural powerbase in 2030, but it could be by the middle of the century.

on. The international organizations are bound to adopt positions on all these topics and they are expected to be able to provide responses and formulate relevant recommendations for national governments.

However, the international organizations are also faced with new challenges and criticisms. One challenge is the increasing number of topics to be addressed and, in response, the creation of a rising number of specialist bodies dedicated to those topics (cf. figure 4). This increases the risk of overlap in their remits and makes these organizations' coordinating role more complicated, despite the fact that this is one reason for their very existence.

A second challenge is the fact that those organizations are increasingly obliged to define their strategies in relation to a rising number of interdependent actors: emerging countries, multinational companies, major foundations, NGOs, and others. In addition,

some of these actors are beginning to question the functioning and legitimacy of the international organizations. In this context, their doctrines for action become fluid compromises dependent on the power relationships between the actors and reciprocal influences: although the international organizations frequently sign joint texts, each is charged with specific issues it is seeking not only to address but to keep in the public eye.

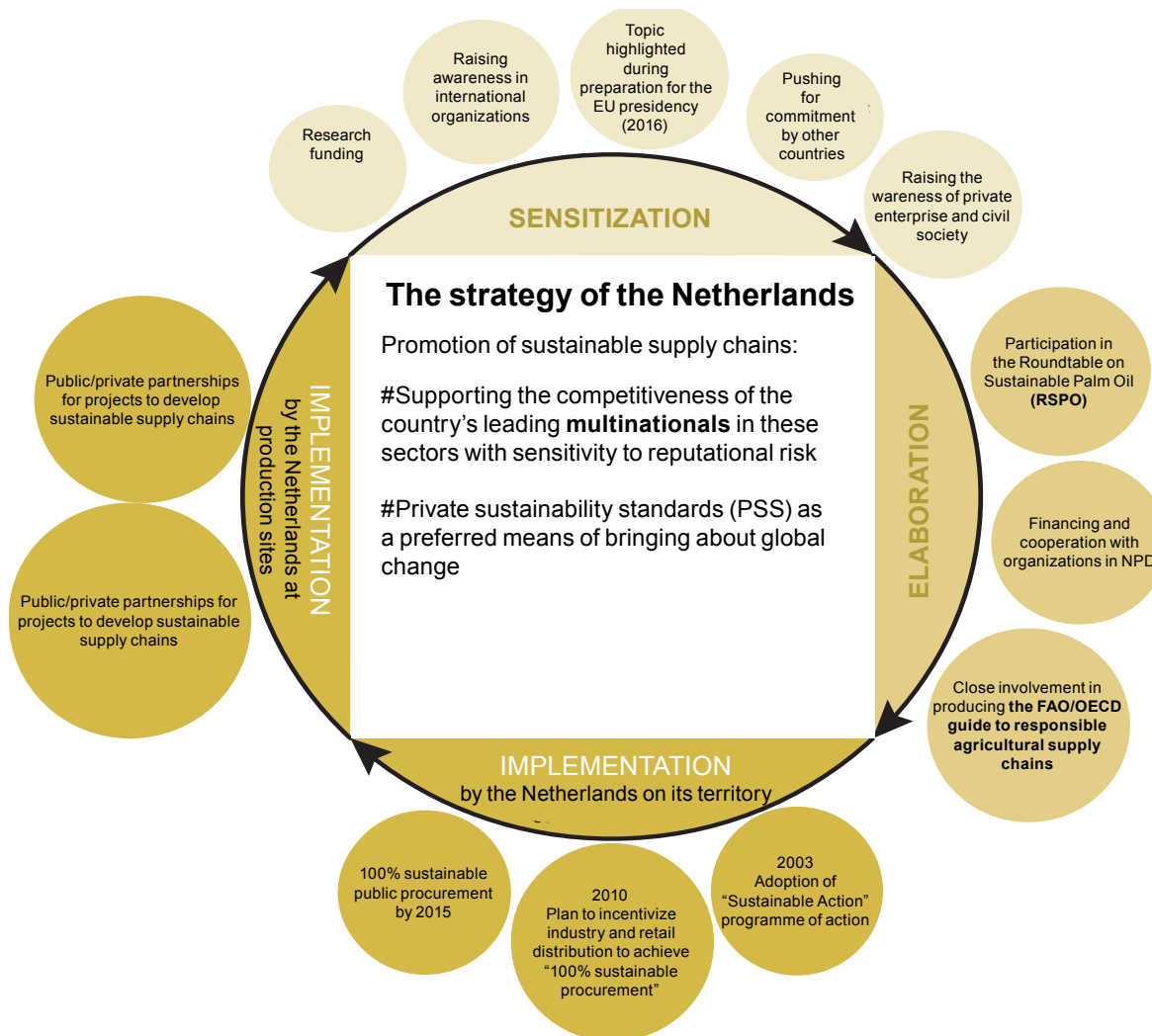
And lastly, a third challenge: the international organizations do not possess, when exerting influence on the international agenda, either the same expert institutional and financial resources or the same political heft. Only two multilateral bodies possess genuine enforcement power over national governments: the World Bank, by making its loans conditional upon adoption of reforms or public policies, and the WTO, through the Dispute Settlement Board.

Figure 4 - A multitude of involved international organizations



Source : MOND'Alim 2030, p. 136

Figure 3 - Palm oil – an example of promotion of sustainable value chains by the Dutch government



Source: the authors, based on the websites of the referenced organizations

3. Multinational companies: concentration and growing influence over global agrifood value chains

Where private actors are concerned, an initial trend isolated by MOND'Alim 2030 is that of concentration at certain points in global food systems, a phenomenon which began many years ago (cf. figure 5) and which has contributed to changes in the powers and strategies of all actors. Whereas in the later 1980s around twenty companies in the agrochemicals industry accounted for 90% of all global sales, by 2011, the 10 leading firms represented 95%. Similarly, the 10 biggest seed producers³ controlled over 75% of the market in 2011, 26% by the global leader, Monsanto, alone. This concentration also involves international wholesalers in primary products and initial processing: in 2011, the “ABCDs”⁴ accounted for between 60% and 75% of global trade flows in cereals and soybeans.

A similar trend is to be seen in the retail sector. Some experts argue that the 10 main actors accounted for just under 30% of the sector sales of the 250 leading global distributors⁵. This concentration has gone even further in central purchasing units. The global spread of supermarkets encourages the restructuring of local production chains, excluding producers and processors that do not have the capacity to meet their requirements.

The phenomenon is somewhat less marked in the agrifood sector: small and

medium-sized enterprises are much commoner upstream than downstream. However, although they are often based locally, some have international activities or form part of regional or global value chains, where they operate alongside the big multinationals. For example, the majority of the 472 biggest international brands are held by 8 major groups accounting for 28% of worldwide sales value in 2011⁶. In addition, concentration in high-income country retail chains tends to favour concentration in the chain's agrifood production link.

Against this backdrop of heightened concentration, multinational companies are increasingly playing a management role in global value chains, these having expanded greatly since the 1980s. This phenomenon leads to “Made in the World” products for which the raw materials and the design and manufacturing stages are split between different countries according to the best available opportunities in terms of logistics, tax, human capital or proximity to major consumer markets. The upshot is a slippage of trade in goods towards trade in tasks and value-added, undermining the concept of “national industries”. Although production activities are fragmented, strategic governance is on the other hand centralized and globalized (cf. figure 6).

Another trend isolated by MOND'Alim 2030 is the affirmation of global private actors not originally from food systems.

This is the case for certain financial actors: since the mid-2000s, markets in agricultural commodity derivatives have been penetrated by new operators from the financial world (speculative funds, pension funds, sovereign funds, banks, and others) motivated by prospects of bull markets and a logic focused on portfolio diversification. The financialization of food systems is also affecting companies upstream and downstream in the chain that have chosen to open up their capital. The pressure brought to bear by financial markets on multinational companies have driven the latter to specialize

3. Monsanto, DuPont, Syngenta, Vilmorin Limagrain, WinFields, KWS, Bayer CropScience et Dow AgroSciences.

4. Archer Daniels Midland (ADM 1902), Bunge (1818), Cargill (1865) et Louis Dreyfus (1851).

5. WalMart, the world's number one company in retail, is significantly ahead of the other enterprises in the global top 10: WalMart, Costco, Kroger, Schwarz, Tesco, Carrefour, Aldi, Metro, Home Depot et Walgreen (January 2016 figures). Mesic I., 2015, *Concentration of the retail trade*, 15th international scientific conference Business Logistics in Modern Management http://blmm-conference.com/wp-content/uploads/Mesic_ab_final_2015.pdf;

Deloitte, 2016, *Global Powers of Retailing 2016, Navigating the new digital divide* <https://www2.deloitte.com/content/dam/Deloitte/global/Documents/Consumer-Business/gx-cb-global-powers-of-retailing-2016.pdf>.

6. Nestlé, PepsiCo, General Mills, Kellogg's, Associated British Foods, Mondelez, Mars, Danone, Unilever et Coca-Cola EcoNexus, 2013, *Agropoly, A handful of corporations control world food production*, Berne Declaration http://www.econexus.info/sites/econexus/files/Agropoly_Econexus_BerneDeclaration.pdf.

Figure 5 - Numerous agricultural producers and consumers but increasingly concentrated agrifood supply chains

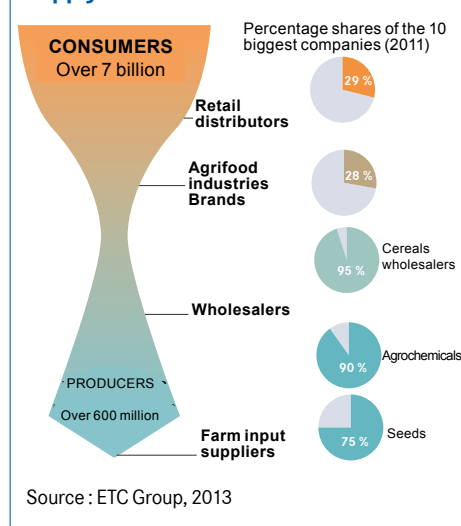
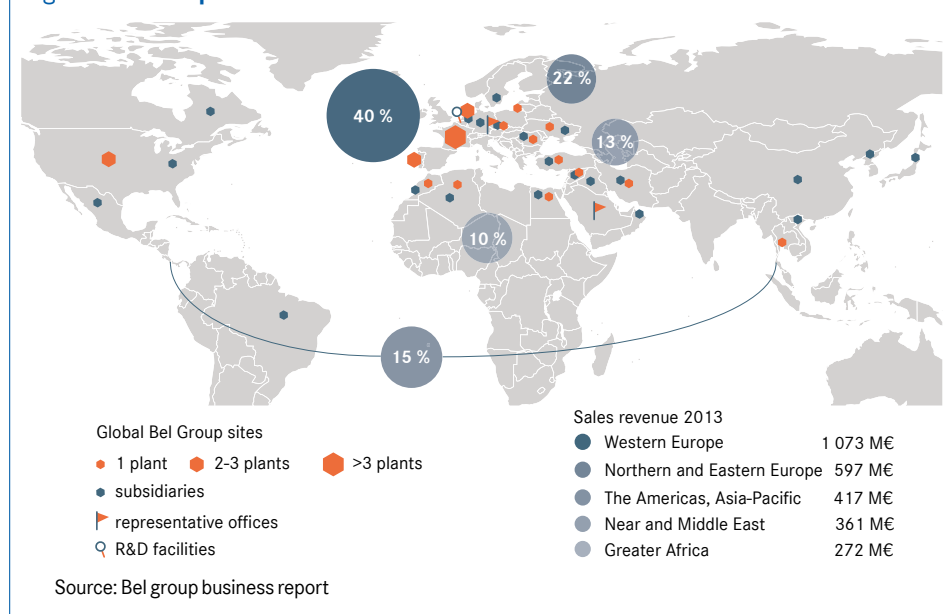


Figure 6 - Bel corporate sites



in sectors offering prospects of additional market share and returns on invested capital. Financialization and globalization are closely associated in the strategies of large corporations.

Non-agricultural actors are also active in food systems, aiming to invest for the long term. For example, multinationals (Philips, Fujitsu, Toshiba) are starting operations in urban agriculture with “vegetable factories”, and on-line retail is expanding in the food sector⁷. These new generations of financial and non-agricultural actors will be increasingly present and influential over the period to 2030 and are likely to change the way systems are organized and the role of traditional operators.

Large firms now hold a central position in global economics and geopolitics: they are a cause of competition between countries based on how attractive their national territories are in terms of infrastructure, legislation, labour cost and tax. In some ways they are themselves becoming inter- and supra-national political powers. The increasing number of negotiating arenas enhances their ability to influence by forming a space subject to less normative pressure than national

territories. While national governments must cope with this growing influence, they also use their “national champions” to defend their own interests: the multinationals, anchored in their countries of origin, are protected as strategic actors and as part of the national heritage. This overlapping of the public and private spheres is also true of the international organizations, as is illustrated by the agreement signed in late 2015 between the FAO and Google for the use of remote sensing data.

Looking to the 2030 horizon, concentration in the agricultural and food sectors will continue to be an underlying trend unless strong international competition law emerges, because profitability and market share goals will drive firms to such forms of reconfiguration. The interconnection of the public sector with multinational companies is also a major trend destined to continue. Where the development of value chains in farming and food is concerned, some experts see a possibility that this dynamic will run out of steam, while others feel that it will simply change its form. Some members of the MOND'Alim group consider that firms upstream in sector supply chains will play a more structurally important role than today against a backdrop of competition for procurement of raw materials for value chains. Lastly, other radical changes could come from on-line sales, which would undermine the domination of retail trade actors.

4. Collective mobilization: a multiplicity of anti-establishment movements, NGO consolidations and contradictions

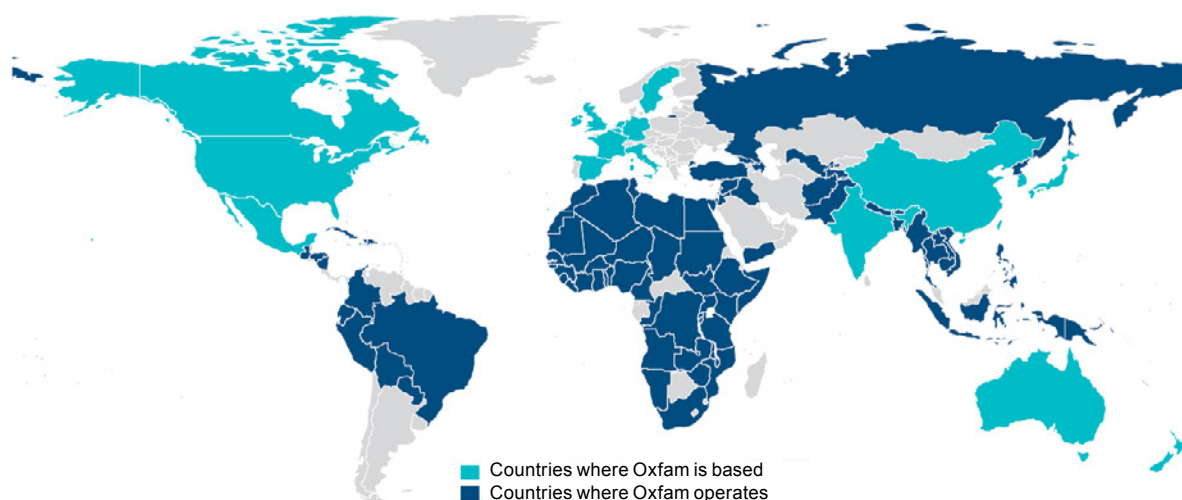
Anti-establishment movements stem from a re-appropriation by society of the problems surrounding food-related issues: health, environment, land, etc. Instances of collective mobilization are more frequent, more diffuse and involve actors with a variety of statuses and modes of action: e.g. unions, non-profit associations, smallholder and faith-based movements, alter-globalists.

NGOs continue to play a central role although its nature changes to adjust to context and actors' strategies. The MOND'Alim group has emphasized the necessity of a distinction between local and global NGOs. The latter originate mainly in Western countries but some do come from the South (the Navdanya organization promoted by Vandana Shiva and the Bangladesh Rural Advancement Committee (BRAC) are examples). They often position themselves as local organizational ambassadors but this role may be criticized by the NGOs represented since they challenge their legitimacy for speaking on behalf of the “South”. NGOs are tending to become more professional, developing accountability practices following globally recognized normative standards (e.g. Global Reporting Initiative).

The global production network structure desired by multinational companies

7. Amazon Fresh, for example. Other digital economy actors may in turn put pressure on them by creating new uses: e.g. Uber Eat, launched in 2015 in Paris, utilizes its fleet of vehicles to deliver meals.

Figure 7 - Oxfam bases worldwide



Source: Oxfam, Annual Report 2013-2014

disconnects production from the places where the products are consumed. Conventional organizations challenging the establishment (unions) act at local or national level whereas the level at which decisions are reached by large companies is supranational. This dual disconnection allows multinationals to escape traditional social regulatory controls. Activism has therefore had to change radically. Backed by nationally-based movements, the big NGOs have set up networks of global partnerships to match the organizational and strategic characteristics of multinationals⁸ (cf. figure 7). Those networks, which are dematerialized, favour rapid, flexible adjustment.

NGOs also have a consultative role with respect to the international organizations and they apply “non-governmental diplomacy” in seeking to influence global agreements. They are in this way actors in international law⁹. Via Campesina, for example, works for the institution of an international agreement to protect small farmers from globalization. Oxfam and WWF are increasingly associated with the definition of policies by national governments and international organizations.

As they become more professional and set up global networks, NGOs also suffer from contradictions. Criticisms point to exploitation of their actions by economic actors in order to develop their markets and protect their

brand image (greenwashing)¹⁰. Some NGOs have favoured alternative modes of operation to the dominant form of trade regulation – fair trade for example (cf. figure 8) – but such initiatives are sometimes criticized as playing into the hands of the multinationals. These criticisms are evidence of the difficulty of big NGOs in finding the right balance between independence and partnership, between accusation and co-construction, between respect for ideals and “incremental” progress. Such contradictions will continue into the future and could lead to the emergence of alternative actors driving collective forms of mobilization.

5. Will food systems' future be urban?

Local government, regions, and especially large cities: claims by territories to be actors in food systems have been a major trend in recent years. Cities are structural focuses for globalization: as major consumer markets, they are also close to the big logistics hubs that concentrate goods flows and at the same time they group economic and political powerbases together along with scientific research, education and sanitary infrastructure, etc. Cities are interconnected, powerful and increasingly autonomous economically and politically. Urged on by their local populations, many elected representatives want to manage

“their” food systems better in conjunction with global systems. The issue of availability (control of procurement) is gradually being superseded by other dimensions of food security: access for all and nutritional quality.

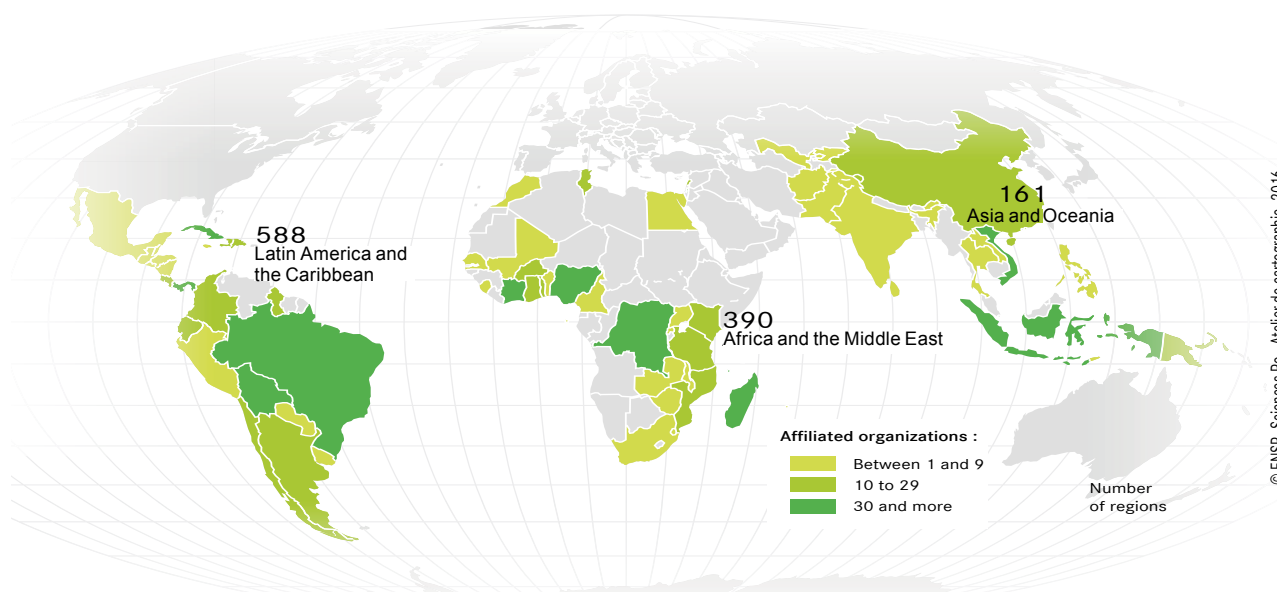
The Milan Urban Food Policy Pact signed by over a hundred cities and local government bodies (cf. figure 9) is symptomatic of the trends at work. Its signatories' intention is to work for the development of sustainable, diversified food systems. Local food governance appears now to be a way of combating spatial inequality, invigorating agricultural and food production and advocating better approaches to regional development. Faced with environmental and climate-related challenges, cities are seeking to preserve their agricultural and natural ecosystems. They are declaring their desire to encourage changes in modes of production and consumption habits, food quality and the

8. Palpacuer F., 2008, « Firme-réseau globale et réseaux transnationaux d'ONG : vers un nouveau mode de régulation ? », *Revue de la régulation*, n° 2, <https://regulation.revues.org/2243>.

9. Pontual S., 2009, « ONG et évolution du droit international », *Projet*, n° 313.

10. Basso O., 2015, *Politique de la très grande entreprise. Leadership et démocratie planétaire*, PUF.

Figure 8 - Fairtrade producer organizations worldwide, 2012



Source: Fairtrade International, "Monitoring the scope and benefits fifth edition 2013"

wellbeing and health of their populations by developing participatory systems. Sustainable food is an attractive theme that helps connect up a region's various functionalities.

Such initiatives are however just beginning and their success will depend on how serious the commitments are – more substantive than declarations in international pacts – and the will to look beyond procurement issues with a view to developing the adjacent rural areas. The involvement of urban centres will expand to the 2030 horizon but it remains to be seen whether these regions will see fair development or whether, conversely, there will be a worsening of inequality within urban centres and between conurbations and the rural areas on their periphery.

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Increasing numbers of influential actors and their interactions form a major trend highlighted by the MOND'Alim group. This will continue into the future. Involvement of large cities at the supranational level will contribute to an increase in this diversity of actors and their power relationships.

11. At the time of writing *MOND'Alim 2030* and author of chapter 5.

Development of “non-state” action, “private” actors and their growing involvement alongside the “public” sphere will increasingly blur the boundaries between their respective statuses.

This multiplicity goes hand in hand with generalized competition between actors needing to justify their existence, given that a degree of accountability is expected of them. Such legitimacy may be pursued in a number of ways: differentiation in the positioning adopted by the international organizations, corporate social responsibility (CSR) strategies, reports by international foundations on their activities, campaigns by NGOs, and so on. An actor's status is no longer enough to define its role and there is a tendency towards hybridization between actors' spheres of action (e.g. political, economic, social, legal). Increasingly, they act beyond their initial specialist remit: businesses participate in defining public policies and producing normative standards, national governments defend economic interests in the context of their diplomatic relations, NGOs certify the products of certain companies, and so on.

The issue of food will continue to be a sensitive topic, one that is important for countries' political stability, particularly in cyclical contexts of rising prices and shrinking supply of agricultural commodities

on international markets. The global food system has seen the emergence of new powers (China, Brazil, India, Russia) that want to share the positions occupied in the past by the United States and the European Union. It remains to be seen whether they also possess political power at the point where they compete on international markets.

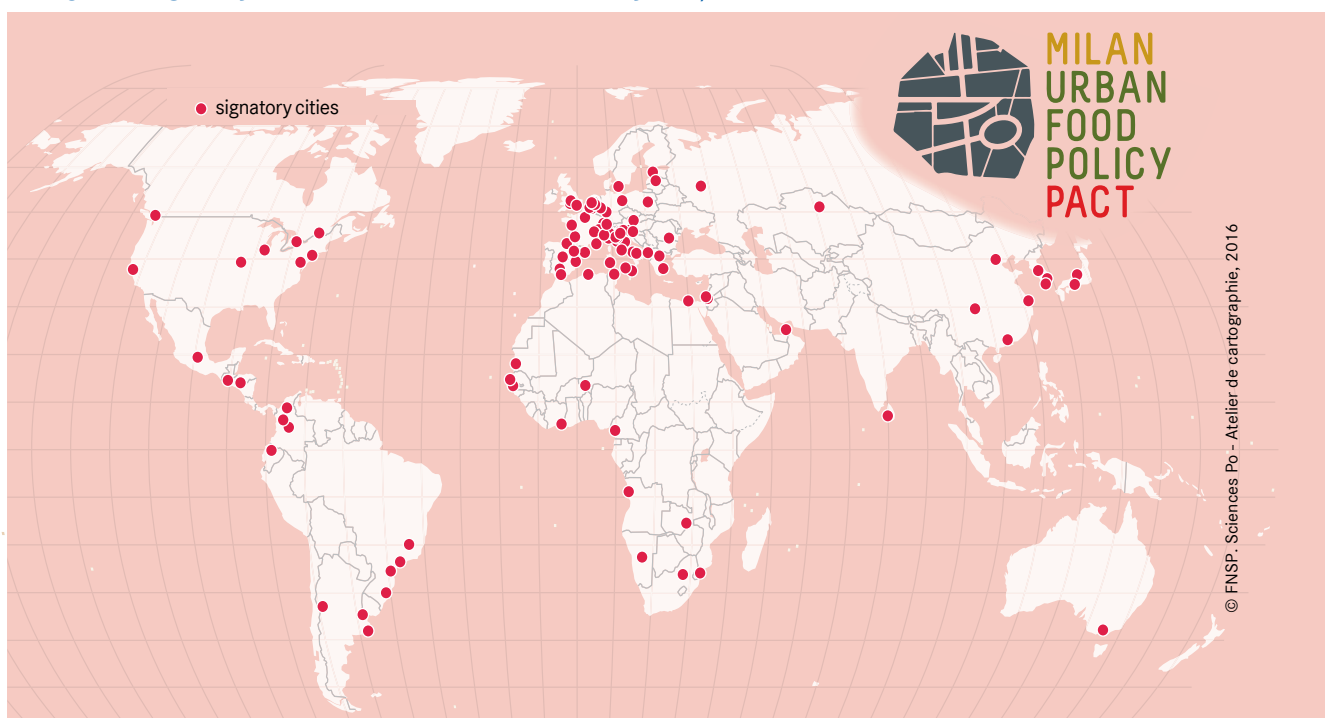
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Figure 9 - Signatory cities to the Milan Urban Food Policy Pact, 2015



Source : www.foodpolicymilano.org/en/urban-food-policy-pact-2

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