EXECUTIVE SUMMARY

TRAMe2035

Scenario for a Transition of Households Dietary Habits by 2035

February 2025

IDDRI
I4CE INSTITUTE FOR CLIMATE ECONOMICS

TRAMe2035
SCENARIO FOR A TRANSITION OF HOUSEHOLDS DIETARY HABITS BY 2035

TRAMe2035 has been written in the framework of a collaboration between Lucile Rogissart (I4CE) and Mathieu Saujot, Clémence Nasr, Charlie Brocard, Pierre-Marie Aubert (IDDRI).

How to cite this report

IDDRI and I4CE (2025). *TRAMe2035, Scenario for a Transition of Households Dietary Habits by 2035*, Executive Summary.

Contact information

Mathieu Saujot, mathieu.saujot@iddri.org

Lucile Rogissart, lucile.rogissart@i4ce.org

Acknowledgments

The study has benefited from the inputs of a Scientific Council composed of L.-G. Soler (Inrae, France's National Research Institute for Agriculture, Food and Environment), B. Hérault (Centre d'études et de prospective, French Ministry in charge of Agriculture), T. Le Gallic (Cired, Centre international de recherche sur l'environnement et le développement), M. Plessz (ENS, Inrae), S. Martin (Ademe, French Agency for Ecological Transition).

This publication has received financial support from the French government in the framework of the France 2030 Investment Plan under the reference ANR-16IDEX-001, the Daniel and Nina Carasso Foundation, the European Climate Foundation (ECF) and the Porticus Foundation, as well as funding from the European Union's Horizon 2020 research and innovation program, through funding No. 101000395.

Financé par l'Union européenne

Pathways

Publication : IDDRI & I4CE
Edition : Pierre Barthélemy
Cover illustration : Faustine Najman
Layout : Ivan Pharabod

EXECUTIVE SUMMARY

The case for a food demand scenario

The importance of a transition to sustainable food

Current food production and consumption trends contribute to a range of public health, social and environmental problems. The need for a transition is no longer in doubt: we must move towards a system that produces healthy food with a low impact on ecosystems, is accessible to all, and ensures fair remuneration for producers.

There's no denying that the questions we raise here are politically and socially sensitive, as food is deeply connected to cultural, economic, environmental and health issues. Nevertheless, it is essential to develop ways to foster open discussion. IDDRI and I4CE have therefore joined forces with several other actors to provide insights for the debate.

While the targets to be achieved are becoming increasingly clear, the feasibility and conditions for implementing this dietary transition are less well studied and remain a subject of debate. Some argue that food consumption is not a variable that can be influenced but rather a factor governed by its own dynamics, over which public and private actors have little control.

In this context, the TRAMe2035 scenario (Transition des Régimes Alimentaires des Ménages à horizon 2035 – *Transition of Households Dietary Habits by 2035*) **aims to demonstrate that a transition to sustainable food is possible and to explore the conditions required for its implementation.** The transition to sustainable food involves nutritional (e.g. increasing fruit and vegetable consumption, reducing intake of ultra-processed products), social (e.g. ensuring access to a sustainable and healthy diet for all), economic (e.g. it challenges sectors and private actors in an increasingly competitive context) and environmental (e.g. sustainable agricultural practices) considerations. This scenario focuses particularly on meat, as it is a major factor in the environmental footprint of French–and European–diets, a symbol of the idea that food consumption is "exogenous", and a contentious issue that requires a nuanced and detailed approach to address its complexity. The TRAMe analysis follows the "less and better" perspective on meat while seriously considering the socio-economic and political constraints involved.

Food consumption is not set in stone… provided that action is taken to shape food environments

For meat, as for other dietary habits, actual consumption often differs considerably from what people report. In reality, the vast majority of the French population does not oppose the idea of reducing meat consumption, and many even claim that they are already doing so. However, at the national level, meat consumption has remained stagnant for the past decade. To bridge this gap between stated intentions and observed behaviour, a shift in approach is needed – moving beyond the sole focus on responsible consumer choices or calls for individual action.

Given these limitations, focusing on "food environments" offers an alternative approach by examining the conditions under which targeted beneficial practices could become easy and appealing. These environments–physical (which products are available on the shelves, what food is offered in collective settings), economic (pricing of food-related products and services), cognitive (available information), and socio-cultural (messages and values conveyed, norms)–shape the context in which we make daily food choices. They are powerful drivers of food demand and have profoundly shaped its evolution in recent decades. In this sense, these environments, largely formed by public and private actors (agri-food industry, retail, catering), are key to achieving a diet that is healthy, sustainable and accessible to everyone.

An innovative approach to support TRAMe2035

This work seeks to answer two key questions: (1) Can food demand (specifically for meat products) evolve in line with environmental and health challenges while reflecting the aspirations of different social groups? (2) What changes in food environments would be needed to achieve this?

The TRAMe2035 scenario outlines a trajectory for the evolution of food demand up to 2035, characterized by the following features:

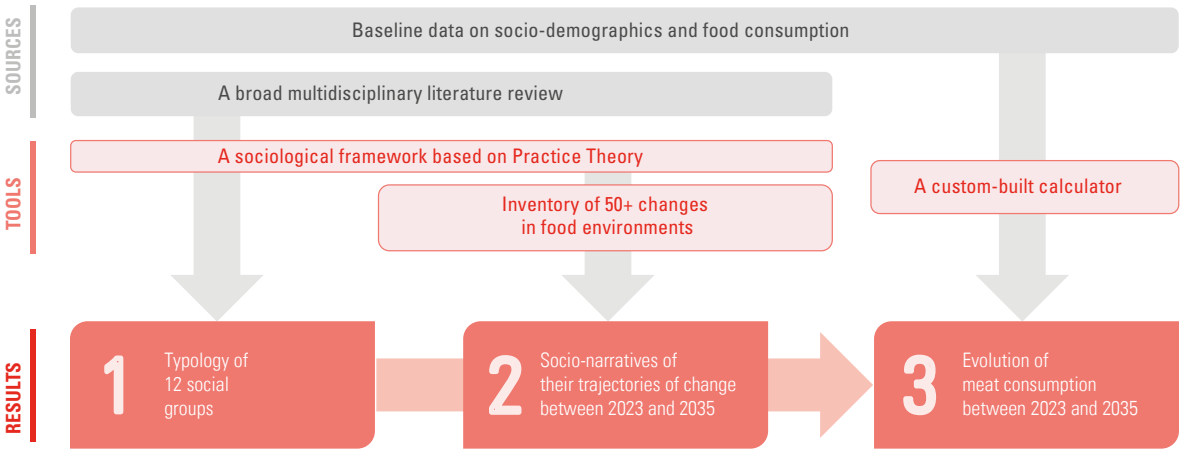
- **A broad analysis of the evolution of food practices, with a particular focus on meat consumption**. While meat is central, all food practices are considered and are subject to change. The proposed methodology can also be applied to other issues, such as health, by promoting increased consumption of fruit and vegetables.
- **A realistic pathway for the food transition, identifying conditions needed to initiate change by 2035** without major disruptions to society or the food system. This is particularly important given the symbolic and cultural significance of meat. Rather than presenting an idealized endpoint, TRAMe proposes a plausible short and medium-term trajectory, with changes that must continue beyond 2035.
- **A plausible and concrete approach to changes in food environments,** as experienced by 12 social groups representative of the French population. TRAMe is built on a conceptual model that sees changes in food practices as the result of both a) the capacities, potential, and aspirations of social groups for change, and b) the influence of public and private actions on food environments.

To develop this scenario, we designed an original methodology that combines sociology, quantitative modelling, and public policy analysis. This approach (detailed in Book 3 - *Methodological framework*) is based on three key tools: (A) a sociologically inspired framework for understanding changes in eating behaviour, based on Practice Theory; (B) an inventory of over 50 changes in food environments, drawing from examples in France and across Europe; (C) a quantitative modelling tool designed to project the evolution of French meat consumption from 2023 to 2035. This methodology leads to three outcomes: (1) a typology of 12 social groups representative of French society; (2) socio-narratives mapping their trajectories of change between 2023 and 2035 (compiled in Book 2 - *Socio-narratives of food transition for 12 social groups*), and (3) the projected meat consumption levels in 2035. Figure A summarizes this methodological framework, the result of four years of developing and applying a multidisciplinary approach.

Linking the evolution of supply and demand

This study is part of a broader foresight exercise on the transformation of the French meat sector, covering the entire supply chain, from upstream to downstream. It follows the publication of an analysis of the sector and a trend scenario to 2035 (Aubert & Poux, 2024), which highlighted challenging future prospects. It also precedes the release of three scenarios for the future supply of meat products, scheduled for the second half of 2025. Together, this body of work aims to assess the conditions for a just transition in the French meat sector, addressing both environmental challenges, which are critical for the long-term sustain-

FIGURE A. Three tools for building the TRAMe2035 exercise



ability of agricultural production, and the socio-economic concerns of livestock farmers, meat industry workers, and consumers.

TRAMe2035 thus seeks to provide an alternative to an undesirable trend scenario. As French meat production has been declining and consumption has been stagnating in recent years, a reduction in consumption could, in principle, enhance sovereignty and lower the environmental footprint of French food. However, given the competitiveness challenges involved, there is a risk that lowering consumption would impact French production rather than lead to a decrease in imports.

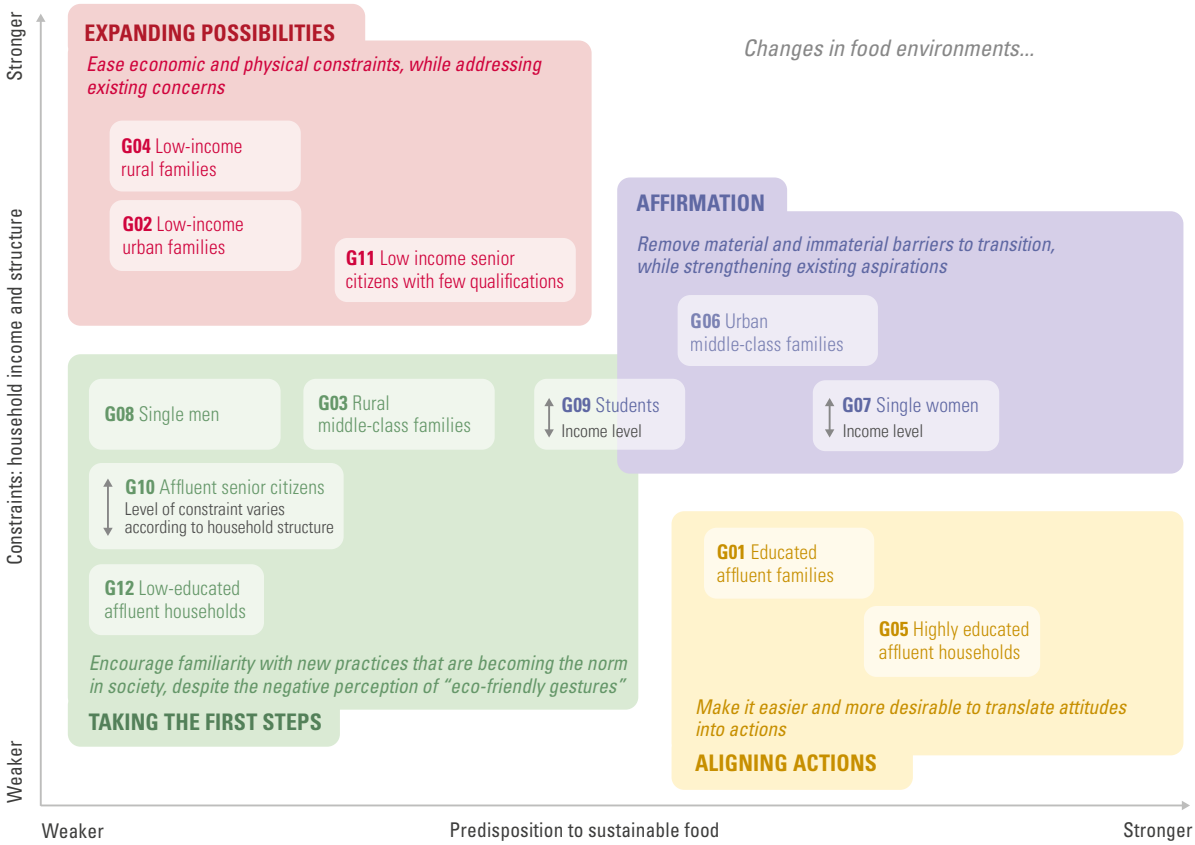
TRAMe2035 sets out a pathway towards "less and better". Building on this, the forthcoming publication will further explore how supply and demand can be better aligned to support the transition of French agriculture. Opening up these discussions together is essential to identifying the conditions for a just transition, or at the very least, to putting them up for debate.

Results

Possible triggers by 2035, respecting social diversity

A significant shift in eating habits, including reduced meat consumption, is possible across all the social groups studied, while acknowledging and building on their current practices. This is demonstrated by the 12 socio-narratives developed in TRAMe2035, which outline how each group responds to changes in food environments (available in Book 2 – *Socio-narratives of food transition for 12 social groups*). This approach moves

FIGURE B. Four key pathways of dietary change across social groups



Source: IDDRI/I4CE.

beyond the idea of an average individual, capturing the complexity of French society. Each group follows its own transition pathway, on its own terms, i.e. one that aligns with its specific constraints and aspirations.

It is possible to engage society as a whole in the transition, without ignoring social inequalities or barriers to change. The developments outlined here do not represent a complete break from current eating habits. Moreover, this scenario helps identify key levers of change for a wide range of social groups, avoiding the pitfall of focusing only on those groups who are already convinced and face few constraints (which represent about 15% of the population). The 12 groups are clustered into four main trajectory types, each representing a transition configuration.

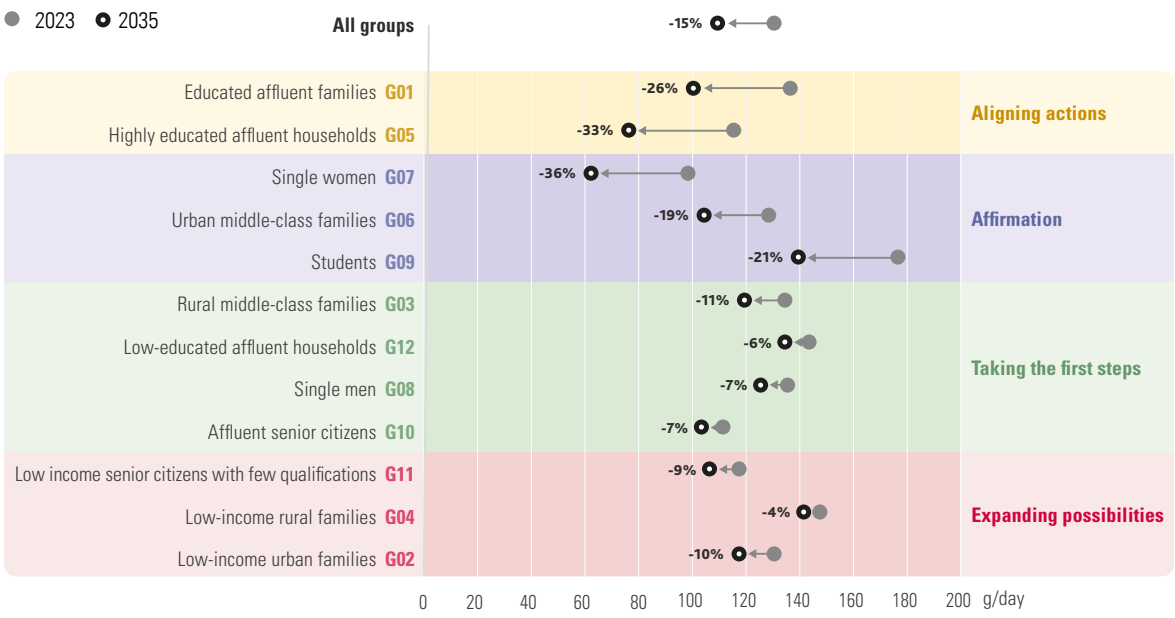
A reduction in meat consumption by 2035, consistent with long-term health and environmental objectives

The TRAMe scenario results in a 15% decrease in average meat consumption between 2023 and 2035. This overall evolution reflects the combined trajectories that are specific to the 12 social groups, with reductions ranging from 4% to 36% depending on the group. This reduction brings the average meat availability to 74 kg per person per year in 2035 (in carcass equivalent)–slightly above Italy's current average. Notably, this is achieved without compromising the nutritional needs of any social group.

This average decrease in meat consumption also varies by type: an 18% reduction for beef, 17% for pork, 8% for poultry, and 28% for other meats (lamb, game, rabbit, etc.). These differences between species are consistent with trends observed in recent decades, where beef and pork consumption has declined while poultry consumption has risen (Aubert & Poux, 2024). Beyond the quantitative aspect of "less", the socio-narratives also highlight possible shifts towards "better" meat, with varying intensities and forms depending on the groups and subgroups. These include preferences for meat from grazing systems, locally produced meat, French origin, quality labels, and other characteristics.

This trajectory to 2035 lays the groundwork for meeting environmental objectives by 2050 and is consistent with nutritional recommendations that integrate health and environmental goals in several European countries. However, this will require extending and deepening the changes initiated in this first phase. This hypothesis aligns with the fact that changes in food environments and practices have cumulative effects over time, reinforcing each other at the household level (e.g., shifts in social norms) and within the food system (e.g., changes in business strategies).

FIGURE C. Meat consumption evolutions 2023-2035 by social group (excluding children)



Note : the average reduction in meat consumption is -14% for the total population, and -15% for the population excluding children.

Source: I4CE/IDDRI.

A strategy and action plan for food environments

The TRAMe2035 scenario and its 12 socio-narratives highlight the crucial role of food environments in shaping food practices. The reworked proverb "where there's a way, there's a will" illustrates this well: change happens through practice, daily actions, and the lived environment–provided it is made possible, easy, attractive, and desirable for as many people as possible. It requires action across all food environments. This has important strategic implications, as public policy remains largely focused on raising individual awareness.

By simulating these 12 trajectories, TRAMe2035 also describes what a coherent, ambitious, and achievable approach to food environments could look like. Existing public policies and numerous private initiatives provide a solid foundation for discussing a short-term action plan. TRAMe2035 builds on changes that have already proven effective across various aspects of the food environment. On the physical side, this includes developments in food distribution (such as shelf reorganization, new products, and shifts in brand marketing), as well as changes in collective and commercial catering (including the introduction of more plant-based meal options and new food service models). It also involves a broader reconfiguration of the food supply, its points of sale, and the social spaces associated with food. On the socio-cultural and informational side, the actions considered include food labels, audiovisual and television content, communication by private companies, and the role of opinion leaders, such as medical professionals acting as influencers, helping to promote both plant-based options and high-quality meat. Finally, on the economic front, the focus is on developing promotional offers for plant-based products, narrowing the price gap between plant-based alternatives and meat, and implementing a moderate increase in social benefits.

The variety of changes envisioned reflects both the diversity of social groups and the multi-dimensional nature of food practices. By accounting for these factors, TRAMe2035 presents a credible scenario. However, it is neither the only possible pathway nor an ideal one–other combinations of changes in food environments could be explored. The purpose of this report is precisely to initiate that debate.

Finally, **changing food environments does not mean restricting consumer freedom**. On the contrary, the proposed changes can broaden choice and give consumers greater control over their daily lives by expanding available options and strengthening their agency. This can be seen, for example, in the expansion of plant-based options, improved regulation of advertising, and efforts to make all food products more economically accessible.

TRAMe2035

A long-term project, TRAMe2035 is the result of four years of developing and applying an original multidisciplinary approach to enable debate on the conditions for dietary transition. This is a politically and socially sensitive issue, as food intersects with cultural, economic, environmental and health dimensions. Nevertheless, it is essential to establish ways to discuss these challenges, and this is precisely what IDDRI and I4CE have been working on in collaboration with numerous stakeholders. This work is part of a broader effort focused on ensuring a just transition for the French meat sector. IDDRI is an independent think tank that provides analyses and pathways for change in international cooperation and sectoral transformations, aiming for a prosperous future for all within planetary boundaries, both in the Global North and South. IDDRI brings together a team of 50 employees, including 40 researchers with multidisciplinary expertise, and operates as a network with around 50 partner think tanks and universities worldwide.

I4CE is a non-profit research institute that contributes to the debate on public policies for climate change mitigation and adaptation. It advocates for policies that are effective, efficient and socially fair. Its 40 experts engage with national and local governments, the European Union, international financial institutions, civil society organizations and the media.

IDDRI I4CE INSTITUTE FOR CLIMATE ECONOMICS