THE FRENCH ORGANIC SECTOR

- RECENT DATA AND METHODOLOGIES

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Primary Production – key figures (end of 2011)

Main associated data | data qualification
--- | ---
23 135 farms (x1.9 / 2007) | Exhaustive / Quarterly
975 141 ha (x1.8 / 2007) | Exhaustive / Annual
3.56% of the land is organically managed (x1.8 / 2007) | Exhaustive / Annual
4.5% of the farms are organic (x2.1 / 2007) | Exhaustive / Quarterly
2.4 annual labor unit in organic farms (1.5 in conventional farms) | Exhaustive / 10 years with an annual update (on a sample)

Other data:

**Volumes** – variable coverage and methodologies:
- work in progress based on average annual yield per products
- ex: coverage of 100% for the meat sector in organized chain (except poultry)

**Prices** – known for some products (daily basis)
### Processed Production – key figures (end of 2011)

<table>
<thead>
<tr>
<th>Main associated data</th>
<th>data qualification</th>
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</thead>
<tbody>
<tr>
<td><strong>12 136 processors</strong> (x1.9 / 2007)</td>
<td>Exhaustive / Quarterly</td>
</tr>
<tr>
<td><strong>Volumes</strong> processed:</td>
<td>Exhaustive or more than 80% coverage for organized chain / Annual or monthly</td>
</tr>
<tr>
<td>238 000 t of cereals/oilseeds/protein crops collected (+19% / n-1)</td>
<td></td>
</tr>
<tr>
<td>332 millions liters of milk collected (+20.5% / n-1)</td>
<td></td>
</tr>
<tr>
<td>20 330 t of bovine/ovine/porcine meat (+17% / n-1)</td>
<td></td>
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**Other data:**

**Values** – estimation of the revenue of companies aggregated at the type of product level (ex: bovine meat, liquid milk, fruits and vegetables).

Based on an annual survey.
Consumption – key figures (end of 2011)

<table>
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<tbody>
<tr>
<td>3 755 M€ by the <strong>household</strong> (+11% / n-1)</td>
<td>Exhaustive / Quarterly Survey / Annual</td>
</tr>
<tr>
<td>- Multiple retailers : 1 840 M€</td>
<td>Survey / Annual</td>
</tr>
<tr>
<td>- Specialist network : 1 327 M€</td>
<td>Survey / Annual</td>
</tr>
<tr>
<td>- Direct sales : 423 M€</td>
<td>Survey / Annual</td>
</tr>
<tr>
<td>- Other retailers : 164 M€</td>
<td></td>
</tr>
<tr>
<td>158 M€ of purchases by <strong>collective catering</strong> (+22% / n-1)</td>
<td>Survey / Annual</td>
</tr>
</tbody>
</table>

Other data:

**Values of groups of products consumption**
– Based on an annual survey.

**Consumer habits**:
- Ratio of people consuming organic products regularly (4 out of 10 at least once a month)
- Site of consumption for different products
- Types of organic products bought
- Perception of the prices of organic products
- Knowledge of organic logos…
Based on an annual survey.
Example of a sector representation – arable crops

In 2011, 8779 farms cultivated 192 077 hectares using organic methods.
- 1 ha organic out of 5 and 38% of French organic farms
  Growing of 13% compared to 2010

238 000 t of cereals, oilseeds and protein crops + C2
  collected during the 2011-2012 harvest
  121 cereals collectors, 57 oilseeds, 57 protein crops

86 000 t of milled grains
  104 mills

75 800 t of wheat flour
  5500 t of other flours
  1979 traditional bakers
  3170 industrial bakers
  185 bread or pasta manufacturers

Great diversity of bread and other cereal products

136 000 added to livestock
20 manufacturers

3 millions of laying hens (+31%/2010)
7.7 millions of chickens (+9%/2010)
7 000 sows (+11%/2010) and other animals

Eggs and other livestock products
Oils, vegetables, drinks, ...

525 millions € of cereal based products:
- 336 millions € of organic bread and flour purchases by households.
- 152 millions € in industries (biscuits, pastries, ...)
- 25 millions € of breakfast cereals

574 millions € of meat products:
- 228 millions € organic eggs (+9%)
- 125 millions € chicken meat
- 133 millions € pork meat and products
- 194 millions € bovine/beef meat

Dry vegetables
- sorting, packaging and selling
- 8000 t of soybean and
  10 000 t of sunflower
  For human food
  5 main oil mills

635 321 ha of pastures and fodder crops including 24 487 ha of lucerne

Storage and/or farm processing
- Livestock food, bread, flours, oils sold directly by the producer

« Soy Food »
- Oils, margarines, ...
  Uses in the food industry
Export/Import – How to improve the data

Current methodology and results:

**Annual survey:**
- Volumes and values of products imported and exported by processing companies and imported by distributors
- Data collected at wholesale and retail level then extrapolated at the end product category
- Regarding the fruit and vegetable sector an estimation of the importation for re-exportation is done

**Monthly survey:**
- Done for some products by our partners (ex: flours, etc…)

**Results:**
- Variable quality in the data given by the companies
- Allows to estimate the import/export values but the volumes are more difficult to assess
Export/Import – How to improve the data

**Improvements in progress:**

- Increasing the quality of the survey responses: systematic telephone interviews for selected key companies (over 2 millions € of turn over)

- Specific surveys (import/export) for important sectors: fruits and vegetables, wine, animal feeding (oilcake import) …

- A work with French customs is about to start to assess the possibility to evaluate organic volumes coming from outside EU to France.
Thank you for your attention

Find all the statistics of this presentation and more at:

www.agencebio.org section “La bio en chiffres”

Meet us on the Sopexa – French delegation stand:

Hall 1, n°1-410f