The French organic food market

Êva Lacarce
French organic farming Observatory

Biofach 2017, European Market
Agence Bio

French national platform for the promotion and the development of organic farming and organic food

- MAAF Ministry of food and agriculture
- MEEM Ministry of Environment
- FNAB
- APCA
- Coop de France
- Synabio

→ Facilitates dialog and favours synergies

- Platform for sharing and pooling resources and for dialog between organic stakeholders
- Inform and promote (communication, organic operators directory)
- Structuring and strengthening the sector (Avenir Bio fund)
- Economic and Statistical observatory
French organic food market in 2015
Sales of organic food from 1999 to 2015 in France by category of distribution channel

Agence Bio, 2015 Market assessment
## Household consumption of organic food

### Table: Annual turnover including taxes

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>supermarkets</strong></td>
<td>1 391</td>
<td>1 617</td>
<td>1 844</td>
<td>1 910</td>
<td>2 035</td>
<td>2 224</td>
<td>2 469</td>
<td>11,0%</td>
<td>44,6%</td>
</tr>
<tr>
<td>network stores sp. in organic food</td>
<td>805</td>
<td>855</td>
<td>950</td>
<td>1 078</td>
<td>1 212</td>
<td>1 365</td>
<td>1 624</td>
<td>19,0%</td>
<td>29,3%</td>
</tr>
<tr>
<td>independent stores sp. in organic food</td>
<td>364</td>
<td>367</td>
<td>377</td>
<td>347</td>
<td>339</td>
<td>361</td>
<td>395</td>
<td>9,6%</td>
<td>7,1%</td>
</tr>
<tr>
<td><strong>all stores specialized in organic food</strong></td>
<td>1 168</td>
<td>1 222</td>
<td>1 326</td>
<td>1 425</td>
<td>1 551</td>
<td>1 725</td>
<td>2 019</td>
<td>17,0%</td>
<td>36,5%</td>
</tr>
<tr>
<td>shopkeepers and artisans</td>
<td>138</td>
<td>159</td>
<td>170</td>
<td>193</td>
<td>220</td>
<td>238</td>
<td>274</td>
<td>15,1%</td>
<td>4,9%</td>
</tr>
<tr>
<td>direct sales</td>
<td>359</td>
<td>389</td>
<td>423</td>
<td>492</td>
<td>577</td>
<td>643</td>
<td>772</td>
<td>20,1%</td>
<td>14,0%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>3 056</td>
<td>3 387</td>
<td>3 764</td>
<td>4 020</td>
<td>4 383</td>
<td>4 830</td>
<td>5 534</td>
<td>14,6%</td>
<td>100%</td>
</tr>
</tbody>
</table>

### Market share of organic food

- 1,9%
- 1,8%
- 2,0%
- 2,1%
- 2,3%
- 2,5%
- **2,9%**

*Monthly series CVS CJO at the price of the previous year (agricultural products including tobacco)*

Agence Bio, 2015 Market assessment
Product shares in the organic food market

Agence Bio, 2015 Market assessment

Fresh and refrigerated shelves >50%

<table>
<thead>
<tr>
<th>Year</th>
<th>Meat</th>
<th>Dairy Products</th>
<th>Seafood, Delicatessen, Frozen Foods</th>
<th>Fruits and Vegetables</th>
<th>Grocery</th>
<th>Bakery</th>
<th>Non Alcoholic Beverages</th>
<th>Alcoholic Beverages</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>12%</td>
<td>20%</td>
<td>6%</td>
<td>16%</td>
<td>21%</td>
<td>8%</td>
<td>5%</td>
<td>11%</td>
</tr>
<tr>
<td>2013</td>
<td>11%</td>
<td>20%</td>
<td>6%</td>
<td>16%</td>
<td>21%</td>
<td>8%</td>
<td>5%</td>
<td>12%</td>
</tr>
<tr>
<td>2014</td>
<td>11%</td>
<td>19%</td>
<td>6%</td>
<td>16%</td>
<td>22%</td>
<td>7%</td>
<td>5%</td>
<td>12%</td>
</tr>
<tr>
<td>2015</td>
<td>11%</td>
<td>18%</td>
<td>6%</td>
<td>18%</td>
<td>23%</td>
<td>7%</td>
<td>5%</td>
<td>13%</td>
</tr>
</tbody>
</table>

(millions €)

- 2012: 4,020
- 2013: 4,383
- 2014: 4,830
- 2015: 5,534
Market share of organic products in general consumption

- Total: 3%
- Eggs: 24%
- Milk: 11%
- Wine: 8%
- Fruits: 5%
- Vegetables: 5%
- Grocery and non-alcoholic beverages: 4%
- Bread and fresh pastry: 3%
- Meat: 2%

Agence Bio, 2015 Market assessment
Market shares of distribution channels for different organic products

Agence Bio, 2015 Market assessment
Origin of organic food consumed in France

- Wine and alcoholic beverages: 99% French supply
- Eggs: 99% French supply
- Milk and dairy products: 93% French supply
- Fresh and transformed meats: 98% French supply
- Bread and fresh pastries: 89% French supply
- Vegetables: 80% French supply
- Fruits: 59% French supply
- Ready-made and frozen: 66% French supply
- Grocery and non-alcoholic beverages: 48% French supply
- Seafood (incl. dried, smoked...): 27% French supply

Agence Bio, 2015 Market assessment
Prospects for 2016

- Approx. 7 billion Euros
- +20 % at least vs 2015

Most dynamic sectors:
- Fruits and vegetables
- Grocery
- Self-service fresh products
- Direct sales
- Stores specialised in organic products
Some facts and figures on French consumers

- **Daily consumers:**
  - Oct 2003: 17%
  - Nov 2013-Jan 2014: 9%
  - V1-2015: 10%
  - V2-2015: 10%
  - 2015: 10%

- **Weekly consumers:**
  - Oct 2003: 20%
  - Nov 2013-Jan 2014: 19%
  - V1-2015: 23%
  - V2-2015: 31%
  - 2015: 27%

- **Monthly consumers:**
  - Oct 2003: 17%
  - Nov 2013-Jan 2014: 21%
  - V1-2015: 29%
  - V2-2015: 27%
  - 2015: 28%

- **Yearly (occasional) consumers:**
  - Oct 2003: 46%
  - Nov 2013-Jan 2014: 26%
  - V1-2015: 26%
  - V2-2015: 22%
  - 2015: 24%

- **Non consumers:**
  - Oct 2003: 37%
  - Nov 2013-Jan 2014: 49%
  - V1-2015: 12%
  - V2-2015: 11%
  - 2015: 11%
French organic production
French organic land use

- **26% Forage crops**: 343,962 ha, 23% conversion, +9%
- **38% Permanent grassland**: 505,949 ha, 21% conversion, +23%
- **23% Arable crops**: 298,251 ha, 31% conversion, +33%
- **4% Other**: 49,730 ha, 24% conversion

**Areas under conversion**

- **5% Vine**: 68,565 ha, 16% conversion, +4%

**Fruits, vegetables and aromatic plants 4%**

- **0.8% Nuts (fruits)**: 10,261 ha, 26% conversion
- **1.0% Fresh fruits**: 13,600 ha, 20% conversion
- **0.6% Fruits for processing**: 7,327 ha, 19% conversion
- **1.4% Vegetables**: 18,682 ha, 6% conversion
- **0.4% Aromatic plants**: 5,873 ha, 18% conversion

* Evolution compared to 2014
* Arable crops, i.e. cereals, oil and protein crops, pulses

Agence Bio, Certification 2015
2016 tendencies

Au 30 juin 2016 et évolution par rapport à fin 2015

<table>
<thead>
<tr>
<th>Acteurs de la Bio</th>
<th>Surfaces Bio*</th>
</tr>
</thead>
<tbody>
<tr>
<td>31 880 fermes</td>
<td>1,57 million d’hectares</td>
</tr>
<tr>
<td>7,2% des fermes françaises</td>
<td>+20 %</td>
</tr>
<tr>
<td>10 % des emplois agricoles</td>
<td></td>
</tr>
<tr>
<td>+10 %</td>
<td></td>
</tr>
<tr>
<td>14 338 transformateurs</td>
<td>Plus d’1 million ha certifiés</td>
</tr>
<tr>
<td>distributeurs, importateurs</td>
<td>bio</td>
</tr>
<tr>
<td>et exportateurs</td>
<td>(500 000 ha en 2007)</td>
</tr>
<tr>
<td>+6 %</td>
<td>+6 %</td>
</tr>
<tr>
<td>46 218 opérateurs</td>
<td>260 000 ha</td>
</tr>
<tr>
<td>(18 380 en 2007)</td>
<td>en première année de conversion</td>
</tr>
<tr>
<td>+9 %</td>
<td>+40 %</td>
</tr>
<tr>
<td></td>
<td>Plus de 5,8 % du territoire</td>
</tr>
<tr>
<td></td>
<td>agricole</td>
</tr>
<tr>
<td></td>
<td>(2 % fin 2007)</td>
</tr>
</tbody>
</table>

*Premières estimations
For more information visit www.agencebio.org
Meet with us @

BioFach, on Business France’s stand
Hall 1, booth 1-221A

International Seminar on organic farming during the International Agricultural Show in Paris on Feb. 28th
http://www.agencebio.org/seminaire-international

- Overview on the organic sector in Europe
- Development factors and obstacles
- Understanding the consumer in Europe
- Communication strategies

www.agencebio.org