The organic sector in France

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Biofach, 12 February 2020
The European Market for Organic Food
French policy towards organic farming and its products
Organic Ambition Program 2022

- **Axis 1**: Develop production → 15% UAA organic in 2022
- **Axis 2**: Structure the organic sectors → double Avenir Bio Fund (8 million €)
- **Axis 3**: Promote consumption for all consumers incl. the most deprived → 20% in collective catering in 2022 → reinforced in Egalim and French Program on Nutrition and Health
- **Axis 4**: Reinforce research on organic sector
- **Axis 5**: Educate and train the operators
- **Axis 6**: Adapt the legal framework
- **Axis 7**: Outermost regions

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The European Market for Organic Food
Agence Bio

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

- MAA Ministry of food and agriculture
- MTES Ministry of Environment
- FNAB
- APCA
- Coop de France
- Synabio

→ Facilitates dialog and action planning dedicated to the development of the organic sector
  - Inform of the trends in production, market and consumption in France and around the world
  - Raise awareness of the general public on OF and its products and supports educational and citizen actions
  - Fosters cooperation between producers, processors and distributors and helps structuring the sector via Avenir Bio Fund
Development and structure of the French organic market
French Organic Market towards massification
9.7 billion €

- Purchases of catering and restaurants: 550 million € (excl. VAT, +22% vs 2017)
- Household consumption of organic food: 9.1 billion € (+15.4% vs 2017, i.e. +1.2 bn €)

Source: French organic market assessment in 2018, Agence BIO/ ANDi

5% of food household consumption is organic
Product shares in the organic food market

Source: French organic market assessment in 2018, Agence BIO/ANDi

- Fruits and vegetables: 19%
- Dairy products: 17%
- Meat: 10%
- Seafood, frozen food, ready meals: 7%
- Bakery: 7%
- Grocery: 7%
- Non-alcoholic beverages: 5%
- Alcoholic beverages: 5%

53% fresh and refrigerated shelves
Share of organic products in their market

- Bread and fresh pastry: 4%
- Meat: 5%
- Grocery and non-alcoholic beverages: 5%
- Vegetables: 7%
- Fruits: 9%
- Wine: 13%
- Milk: 15%
- Eggs: 32%
- TOTAL: 5%
## Market shares of distribution channels for different organic products

**Source:** French organic market assessment in 2018, Agence BIO/ANDi

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Supermarkets</th>
<th>Organic shops</th>
<th>Direct sales</th>
<th>Shopkeepers and artisans</th>
</tr>
</thead>
<tbody>
<tr>
<td>All products</td>
<td>49%</td>
<td>34%</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>Fruits and vegetables</td>
<td>34%</td>
<td>43%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Milk</td>
<td>82%</td>
<td>25%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Milk products</td>
<td>62%</td>
<td>25%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Eggs</td>
<td>64%</td>
<td>30%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Poultry</td>
<td>55%</td>
<td>25%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Deli meat</td>
<td>70%</td>
<td>27%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other meat</td>
<td>59%</td>
<td>15%</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>Seafood, frozen food, ready meals</td>
<td>69%</td>
<td>26%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Bakery</td>
<td>40%</td>
<td>42%</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>Salted groceries</td>
<td>49%</td>
<td>49%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sweet groceries</td>
<td>54%</td>
<td>46%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non alcoholic beverages</td>
<td>64%</td>
<td>41%</td>
<td>34%</td>
<td>19%</td>
</tr>
<tr>
<td>Alcoholic beverages</td>
<td>20%</td>
<td>21%</td>
<td>41%</td>
<td>19%</td>
</tr>
</tbody>
</table>

- **Milk:** supermarkets
- **Fruits and veggies:** organic retailers and direct sales
- **Wine:** wine shops
- **Bread:** bakeries
- ...
### Origin of organic food consumed in France

**Source:** French organic market assessment in 2018, Agence BIO/ANDi

<table>
<thead>
<tr>
<th>Product Category</th>
<th>France</th>
<th>EU</th>
<th>Third country</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL PRODUCTS</td>
<td>68.9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wine and alcoholic beverages</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eggs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Milk and milk products</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meat (processed and unprocessed)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bakery</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vegetables</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fruits</td>
<td>42.6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ready meals and frozen food</td>
<td>65.6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Groceries and non alcoholic beverages</td>
<td>38.1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seafood</td>
<td>23.0%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **A fair national supply** consistent with the consumers demand
- Fruits: banana, citruses and some exotic
- Seafood: shrimps and salmon
- Groceries and juices: sugar, olive oil, citruses

**Diversity and dynamism of French organic production and structuring**
The French organic production keeps up with the demand
Evolution of the French organic production

Source: Annual organic farm survey, Agence BIO/Control bodies

7.5% of French UAA is organic
French regions and organic area

Growth over 10% in most regions

60% of the area in 4 regions
- Occitanie
  9,403 farms, 507,242 ha
- Nouvelle-Aquitaine
  6,157 farms, 275,953 ha
- Auvergne-Rhône-Alpes
  5,858 farms, 251,976 ha
- Pays de la Loire
  3,270 farms, 192,211 ha

Source: Annual organic farm survey, Agence BIO/Control bodies, Agreste 2017
Evolution of the organic share of the UAA

Source: Annual organic farm survey, Agence BIO/Control bodies
Evolution of the organic share of the livestock

Source: Agence Bio / OC, Agreste 2017