



The organic sector in France

Eva Lacarce
Agence BIO

www.agencebio.org

Biofach, 12 February 2020

The European Market for Organic Food





French policy towards organic farming and its products

Biofach, 12 February 2020

The European Market for Organic Food

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



Biofach, 12 February 2020

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

Biofach, 12 February 2020

The European Market for Organic Food





Development and structure of the French organic market

Biofach, 12 February 2020

The European Market for Organic Food

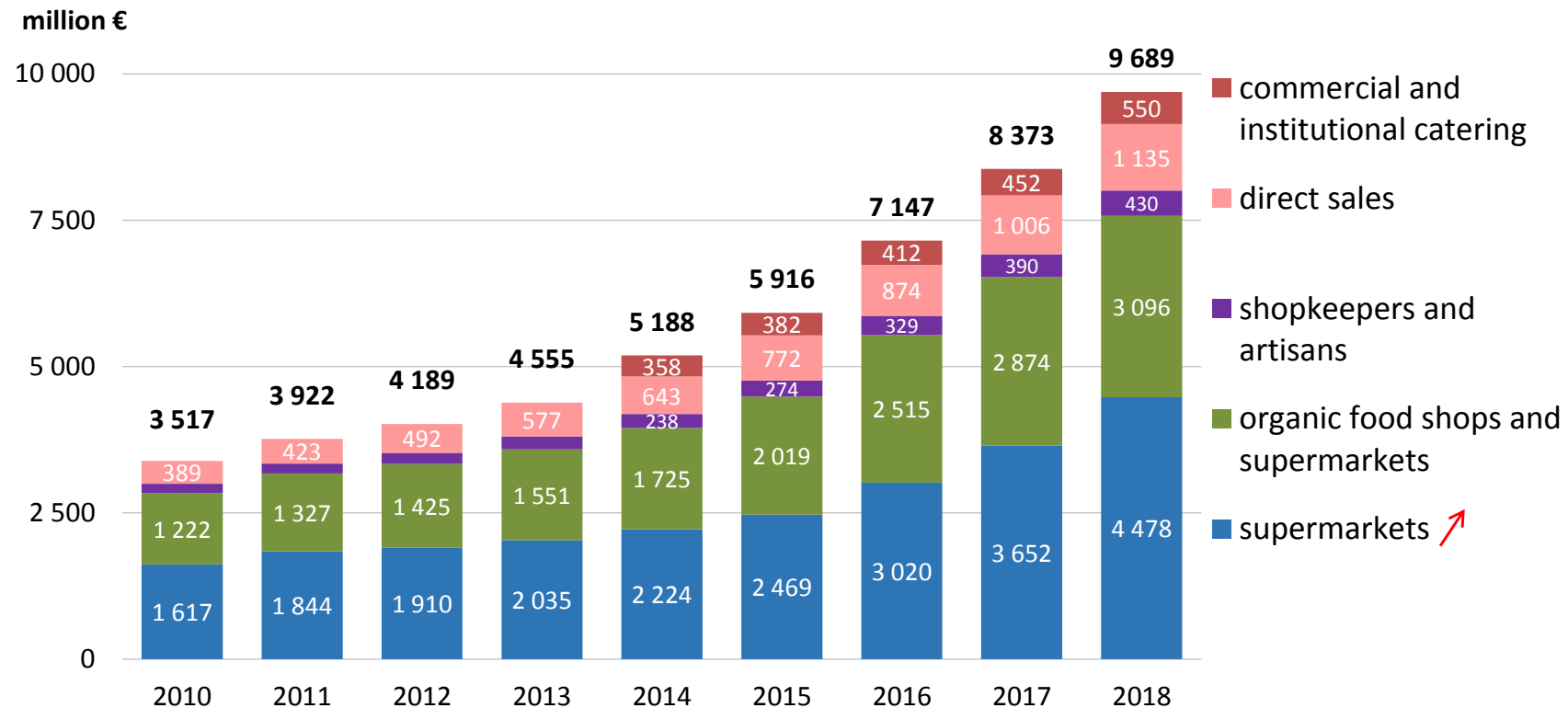
French Organic Market towards massification

9.7 billion €

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

- 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 €)

5% of
food
household
consumption
is organic

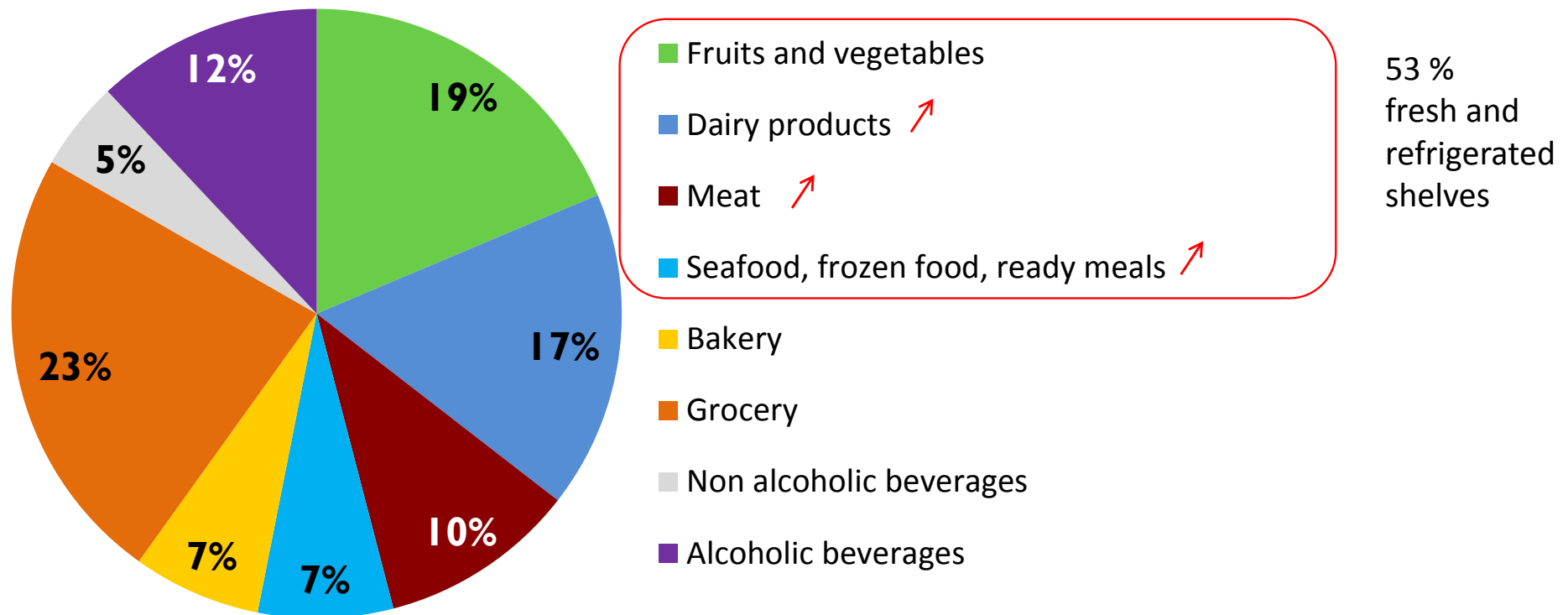


Biofach, 12 February 2020

The European Market for Organic Food

Product shares in the organic food market

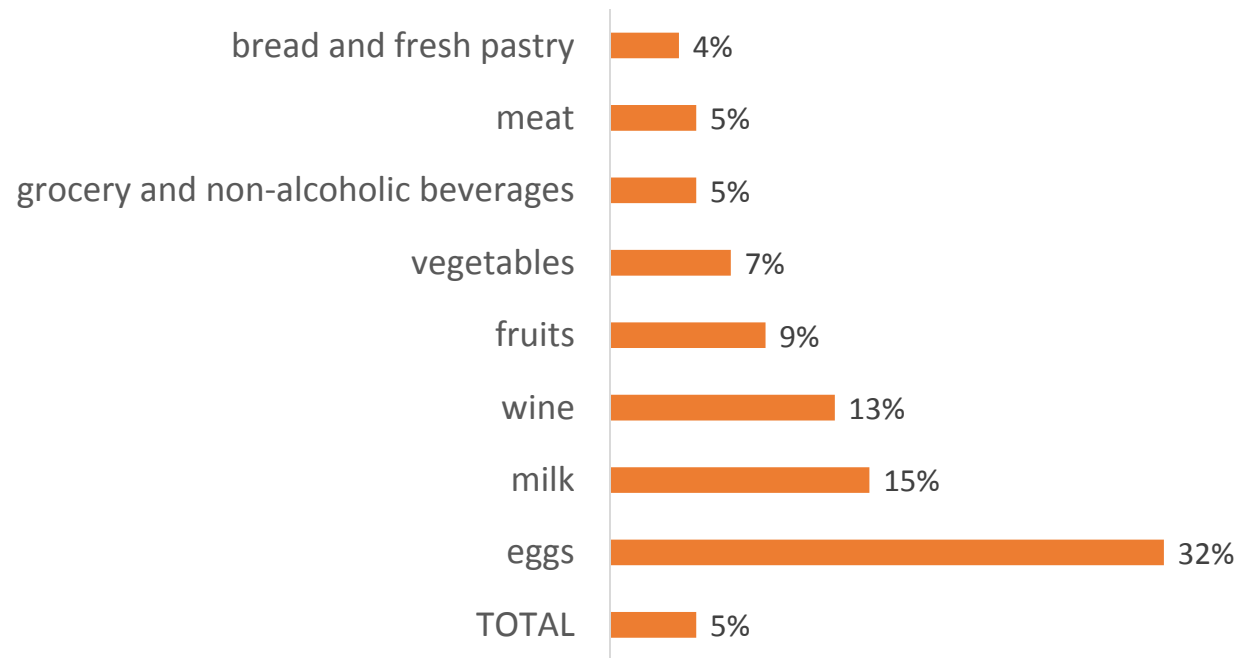
Source : French organic market assessment in 2018,
Agence BIO/ ANDi



Biofach, 12 February 2020

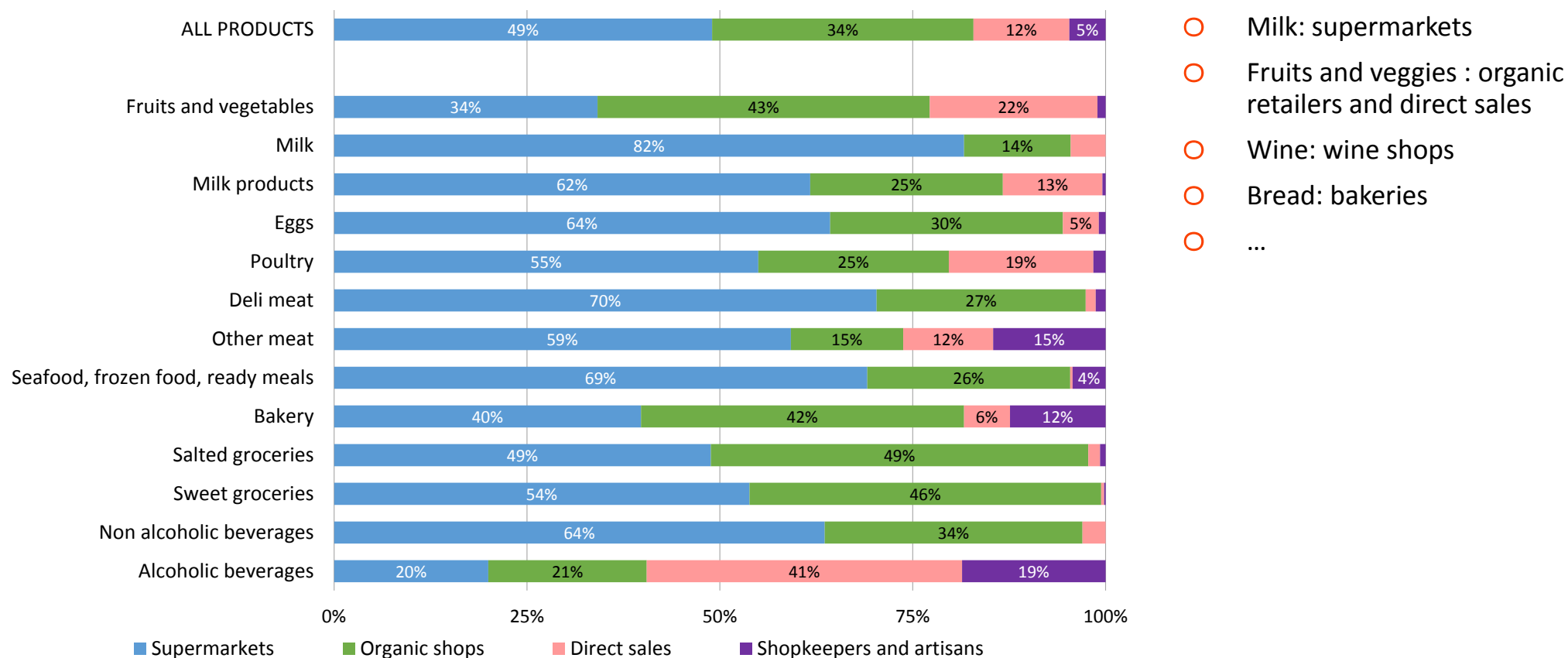
The European Market for Organic Food

Share of organic products in their market



Market shares of distribution channels for different organic products

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

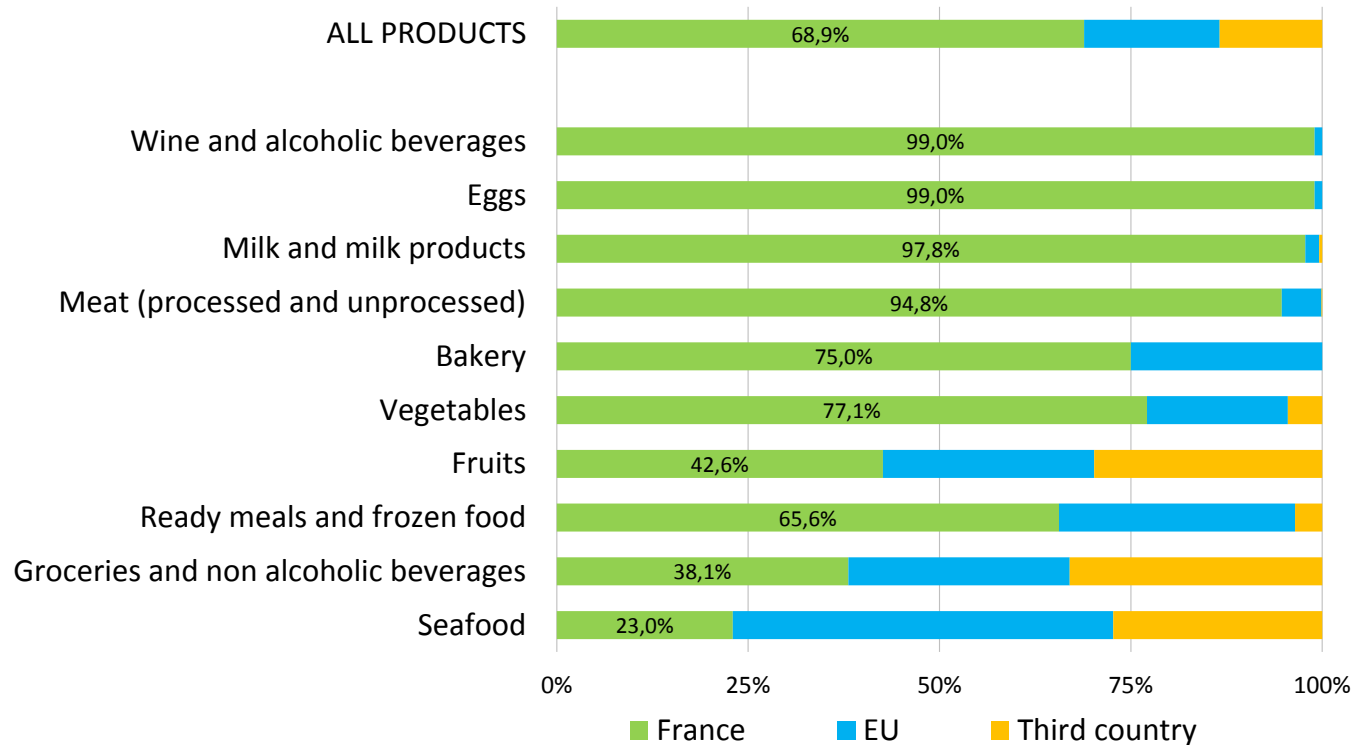


Biofach, 12 February 2020

The European Market for Organic Food

Origin of organic food consumed in France

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



- **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

Biofach, 12 February 2020

The European Market for Organic Food



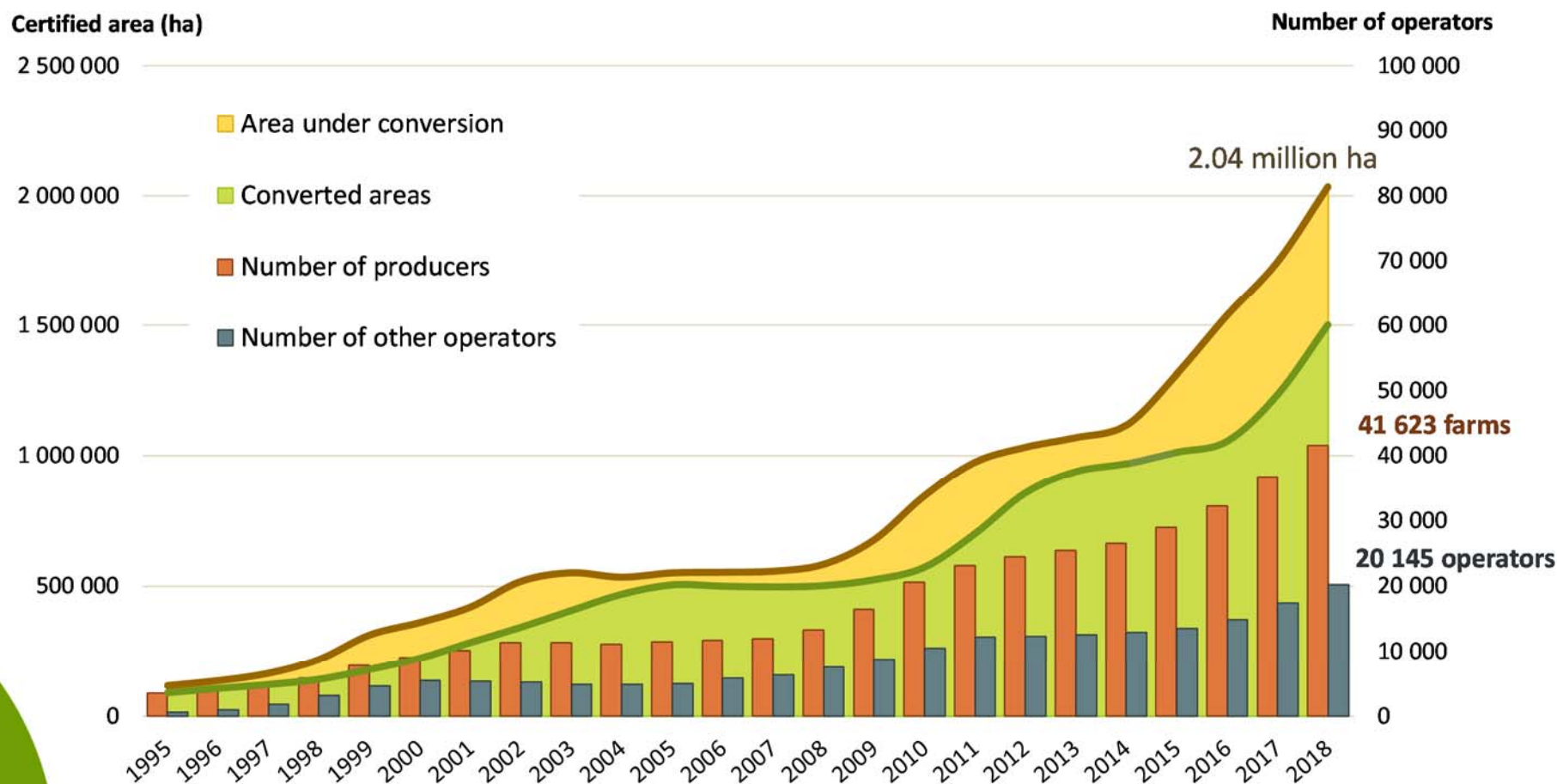
The French organic production keeps up with the demand

Biofach, 12 February 2020

The European Market for Organic Food

Evolution of the French organic production

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



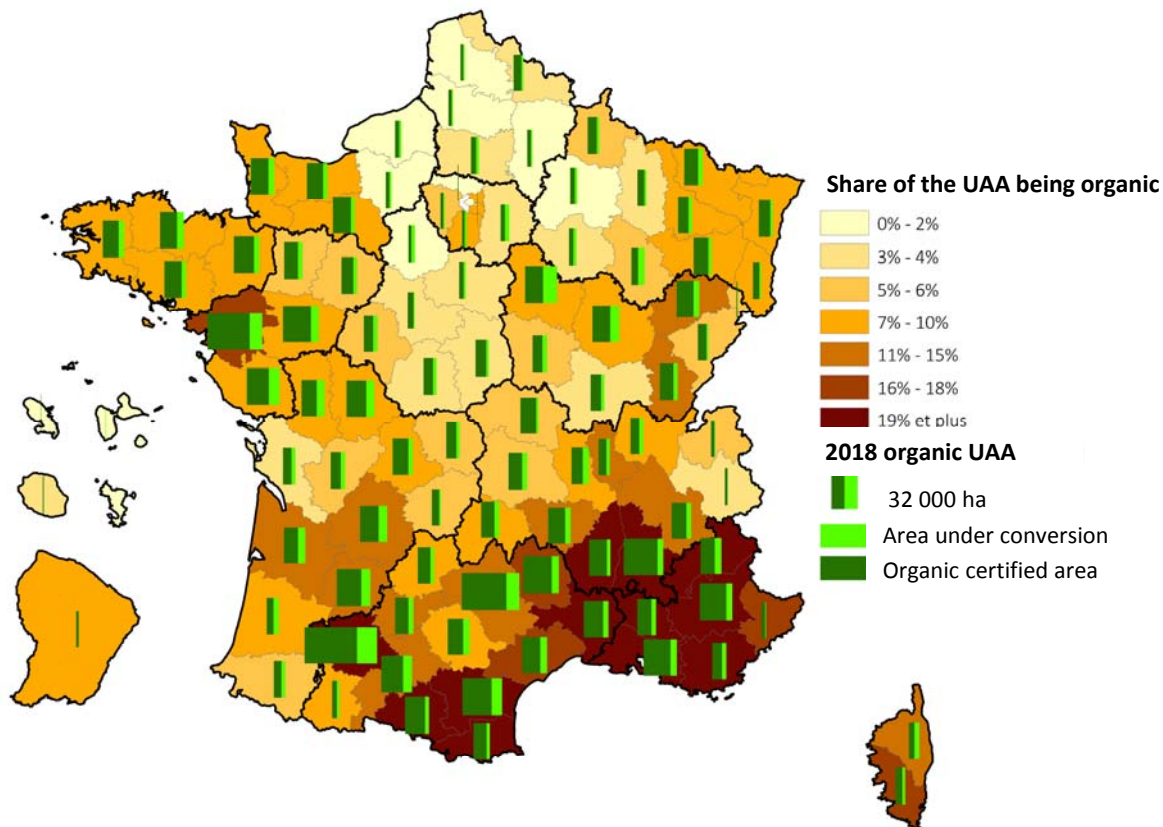
7.5% of
French UAA is
organic

Biofach, 12 February 2020

The European Market for Organic Food

French regions and organic area

Source : Annual organic farm survey,
Agence BIO/ Control bodies, Agreste 2017



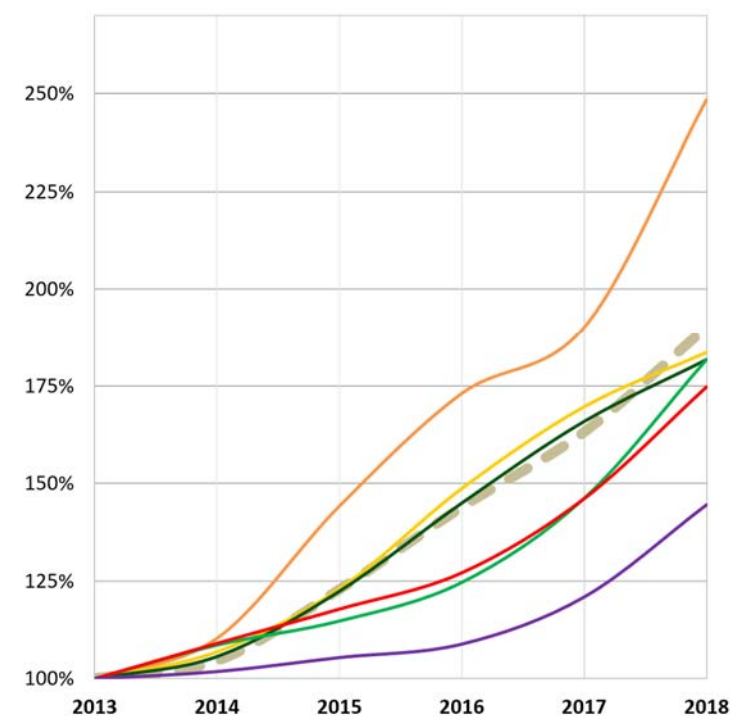
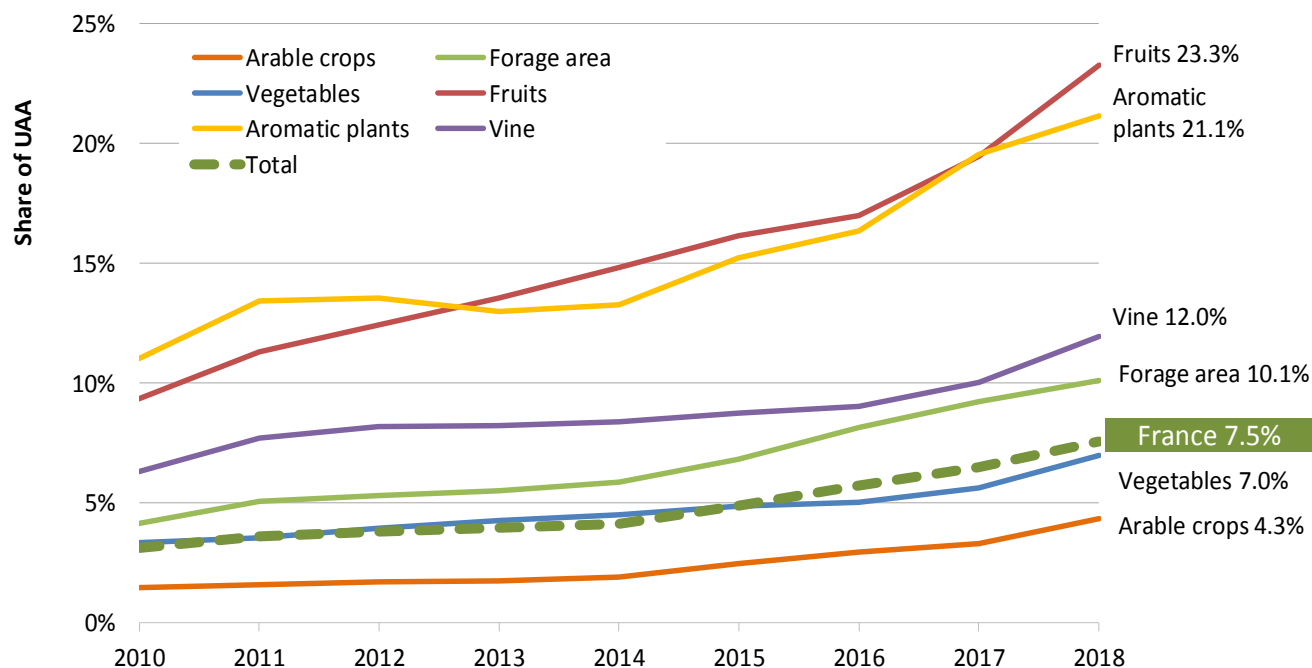
- Growth over 10%
in most regions
- 60 % of the area in 4 regions
 - Occitanie
9 403 farms, 507 242 ha
 - Nouvelle-Aquitaine
6 157 farms, 275 953 ha
 - Auvergne-Rhône-Alpes
5 858 farms, 251 976 ha
 - Pays de la Loire
3 270 farms, 192 211 ha

Biofach, 12 February 2020

The European Market for Organic Food

Evolution of the organic share of the UAA

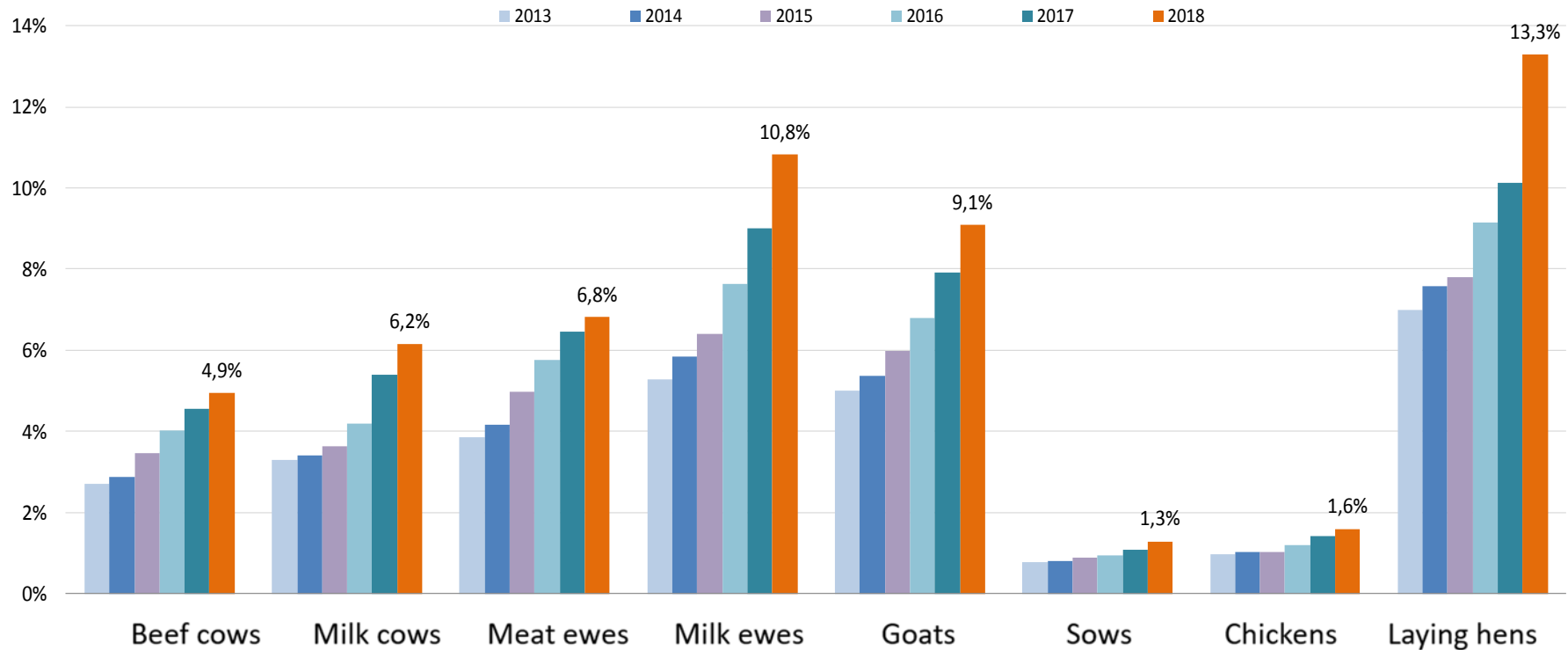
Source : Annual organic farm survey,
Agence BIO/ Control bodies



Biofach, 12 February 2020

The European Market for Organic Food

Evolution of the organic share of the livestock



source : Agence Bio / OC, Agreste 2017