



**RÉPUBLIQUE
FRANÇAISE**

*Liberté
Égalité
Fraternité*



The French Organic Market

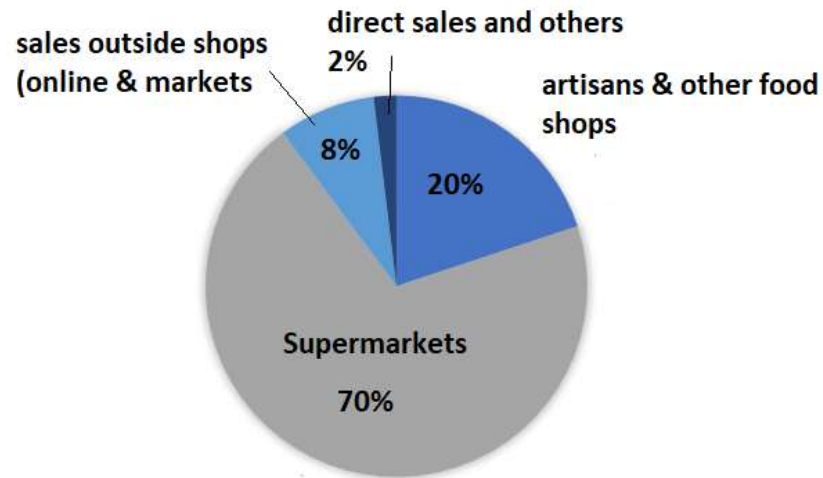
Laurence Foret-Hohn, Deputy Director of Agence BIO

BIOFACH – July 26th 2021

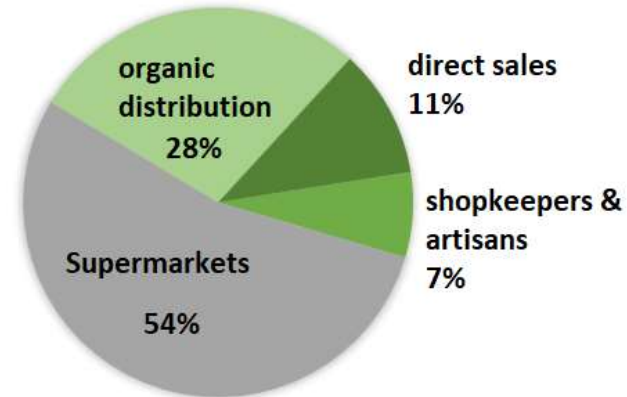
The European market for organic food

Shares of sales for all food and for organic food (in value)

Distribution of all food sales in 2020
(taxes incl.)



Distribution of organic food sales in 2020
(taxes incl.)
12.8 billion euros



Sources : INSEE & Agence BIO/AND-I

First quarter 2022

SUPERMARKETS, DRIVE, HARD DISCOUNT AND CONVENIENCE SHOPS

- ▶ -12.7% for grocery products with fixed weight (without fresh products)
- ▶ -11.3% for drinks
- ▶ -16.2% for fresh products with fixed weight
- ▶ Growth of organic sales only for frozen fishes & meats, dietetic products and pet food
- ▶ Decrease of the organic range in supermarkets

Sources : Agence BIO/Nielsen

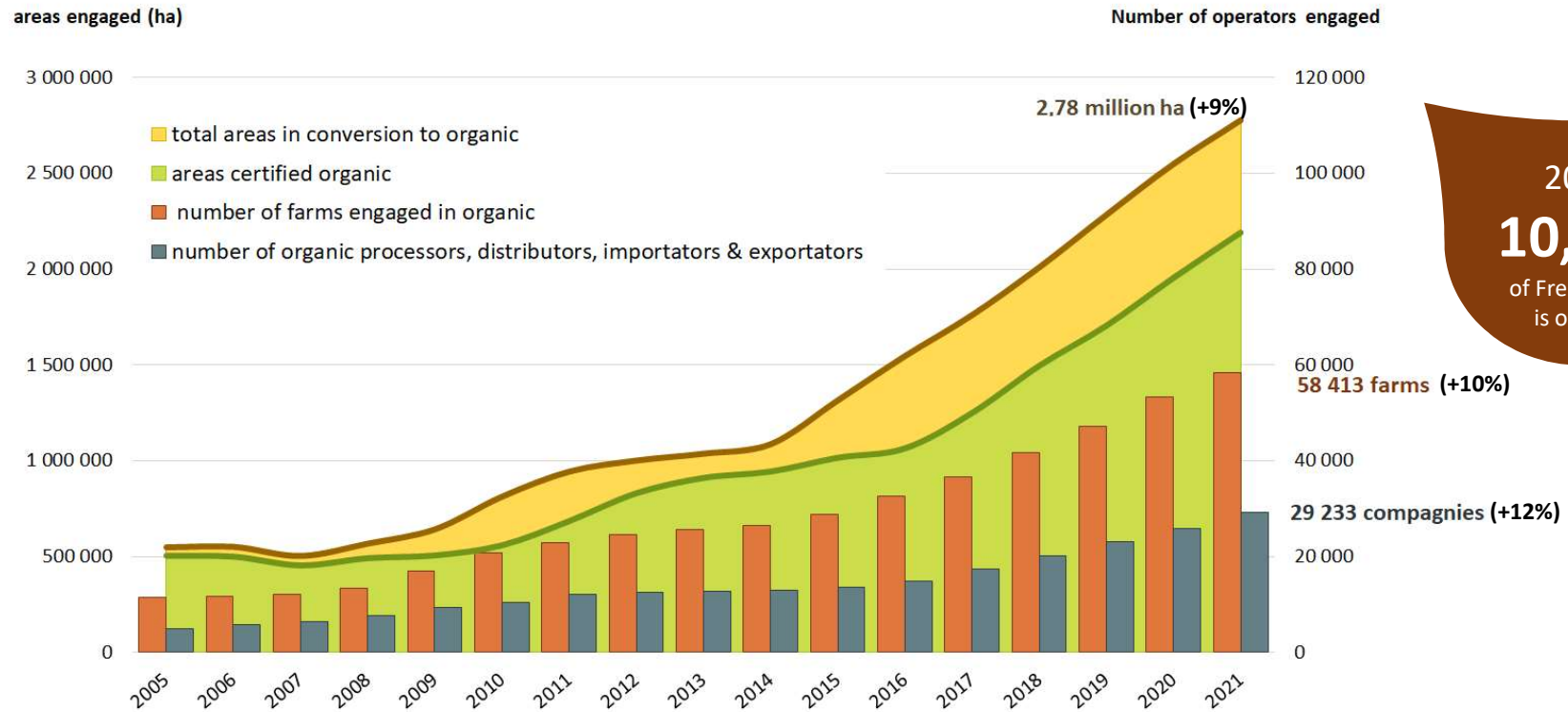
ORGANIC SHOPS

- ▶ -16.6% of the total sales with a constant number of shops vs 2021
- ▶ New shops are still opening.
- ▶ Organic shops keep on restructuring and developing private labels.

Sources : Biolinéaires

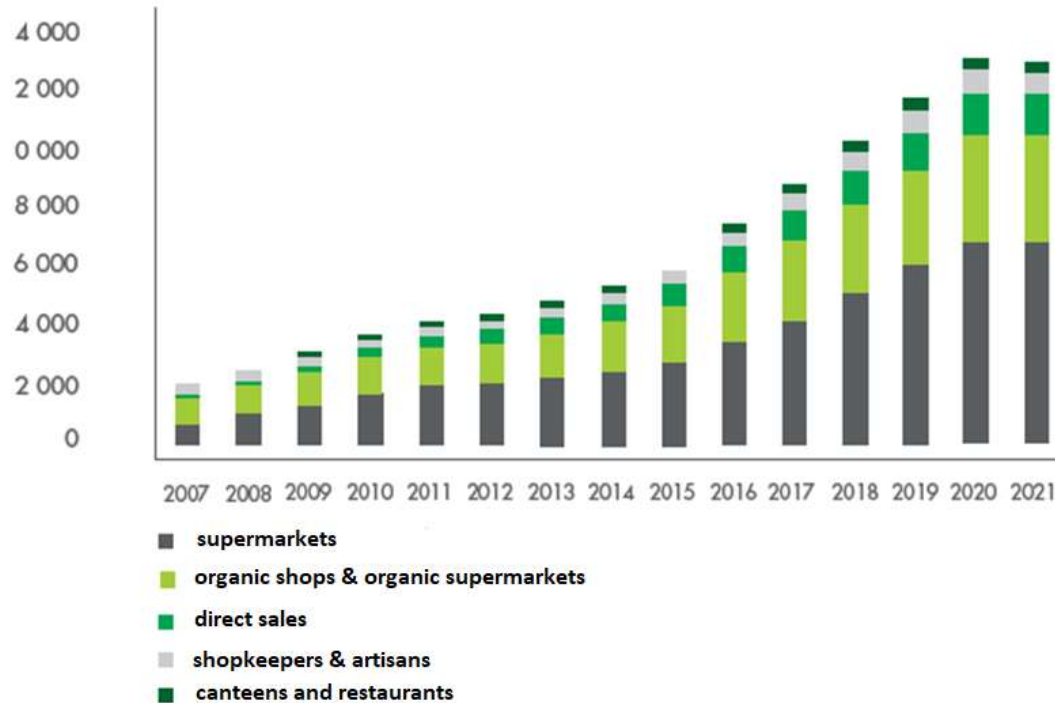
Year 2021

Organic operators in 2021



FRENCH ORGANIC MARKET STAGNATED IN 2021 (-0,5%)

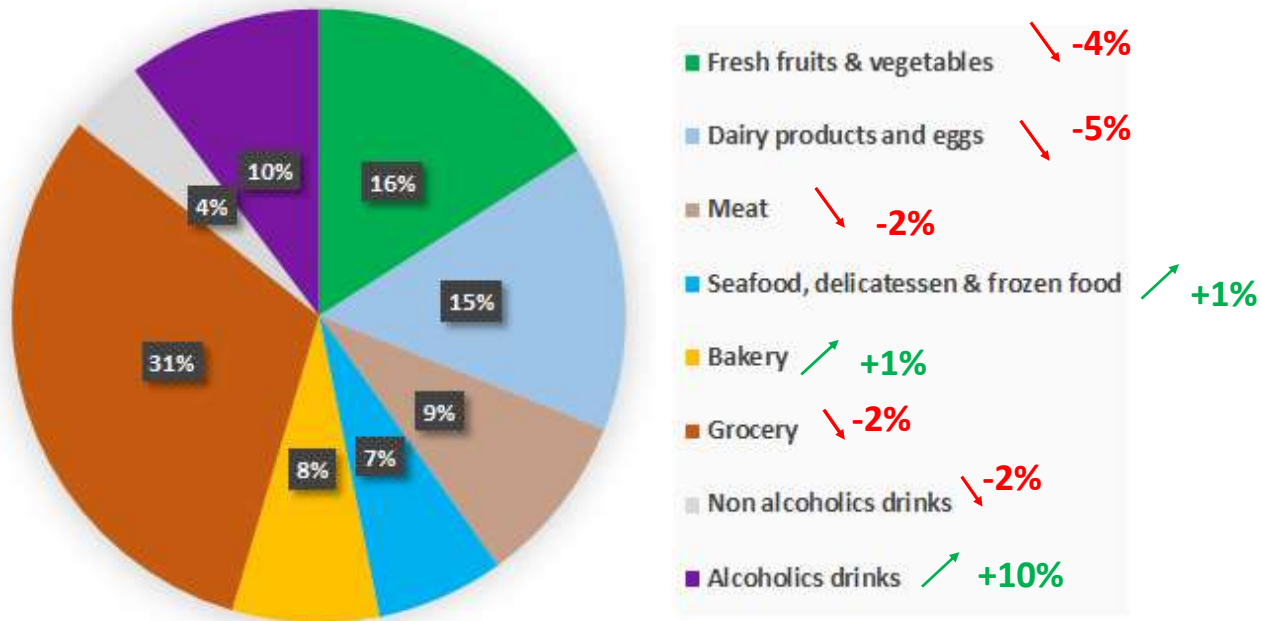
Evolution of the French organic market by distribution channel since 2005



Source : Agence BIO/ANDI – 2022

- ▶ but increase vs 2019
- ▶ in 2021 :
 - increase for direct sales (+7.9%), shopkeepers & artisans (+5.8%) and catering (+20.6%) vs 2020
 - decrease for supermarkets (-3.9%) and for organic shops (-1.8%)
- ▶ 6.4% of the French food market in 2021
- ▶ Almost 13.3 billion € (including catering)

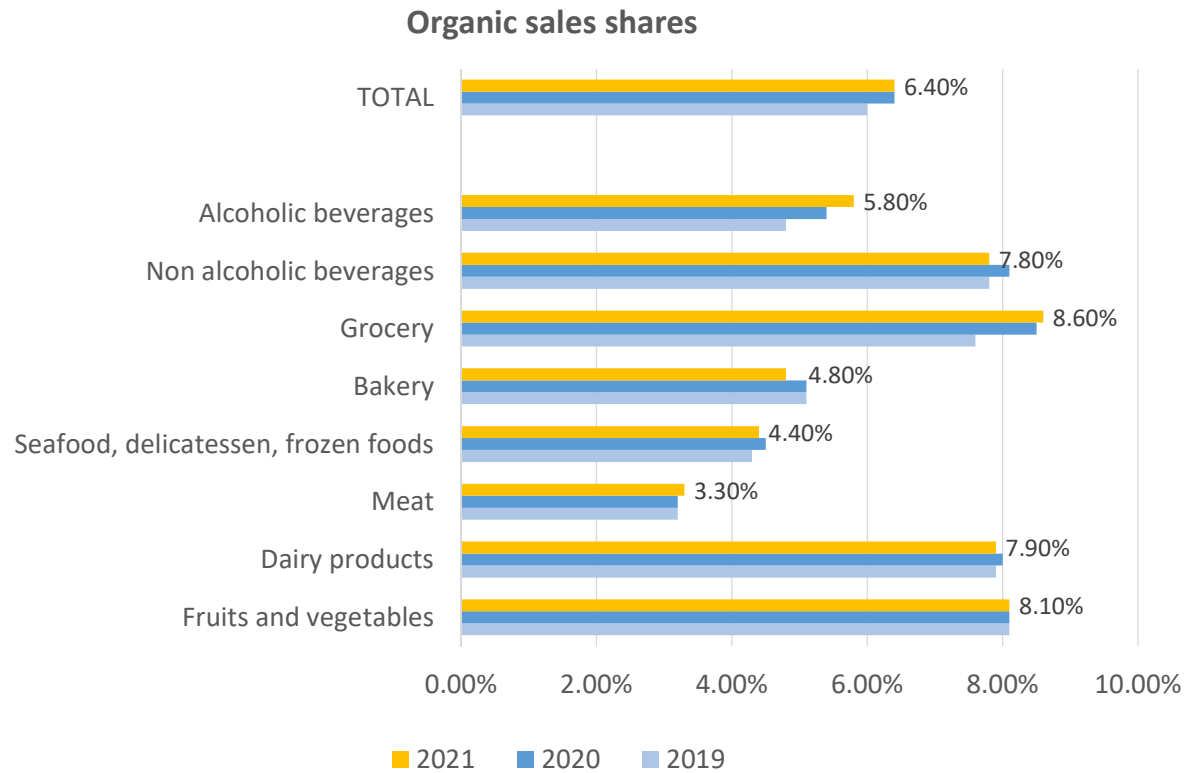
PRODUCT SHARES IN THE ORGANIC FOOD MARKET



54 %
 fresh and refrigerated shelves
 vs. 58 % 2015

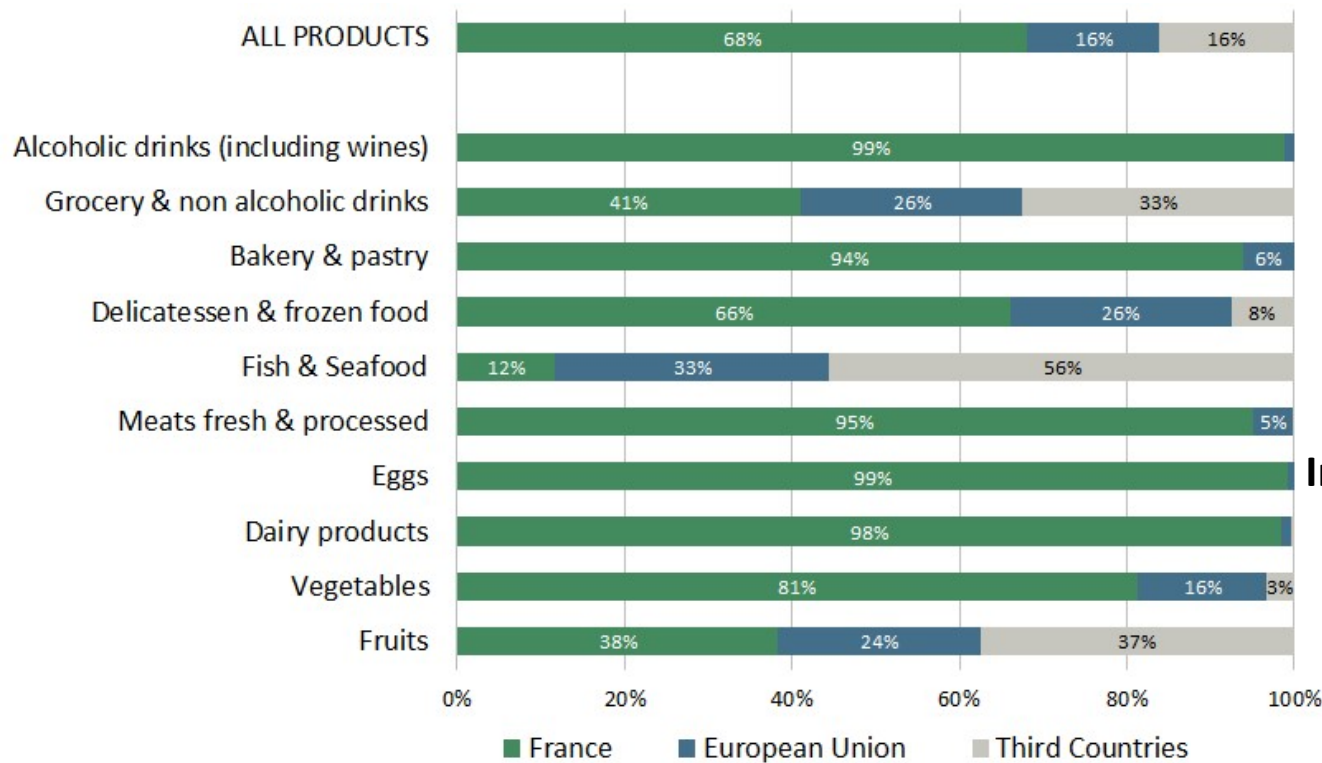
Source : Agence BIO/ AND-I 2022

SHARE OF ORGANIC PRODUCTS IN THEIR MARKET



Source : Agence BIO/ AND-I 2022

ORIGIN OF ORGANIC FOOD CONSUMED IN FRANCE

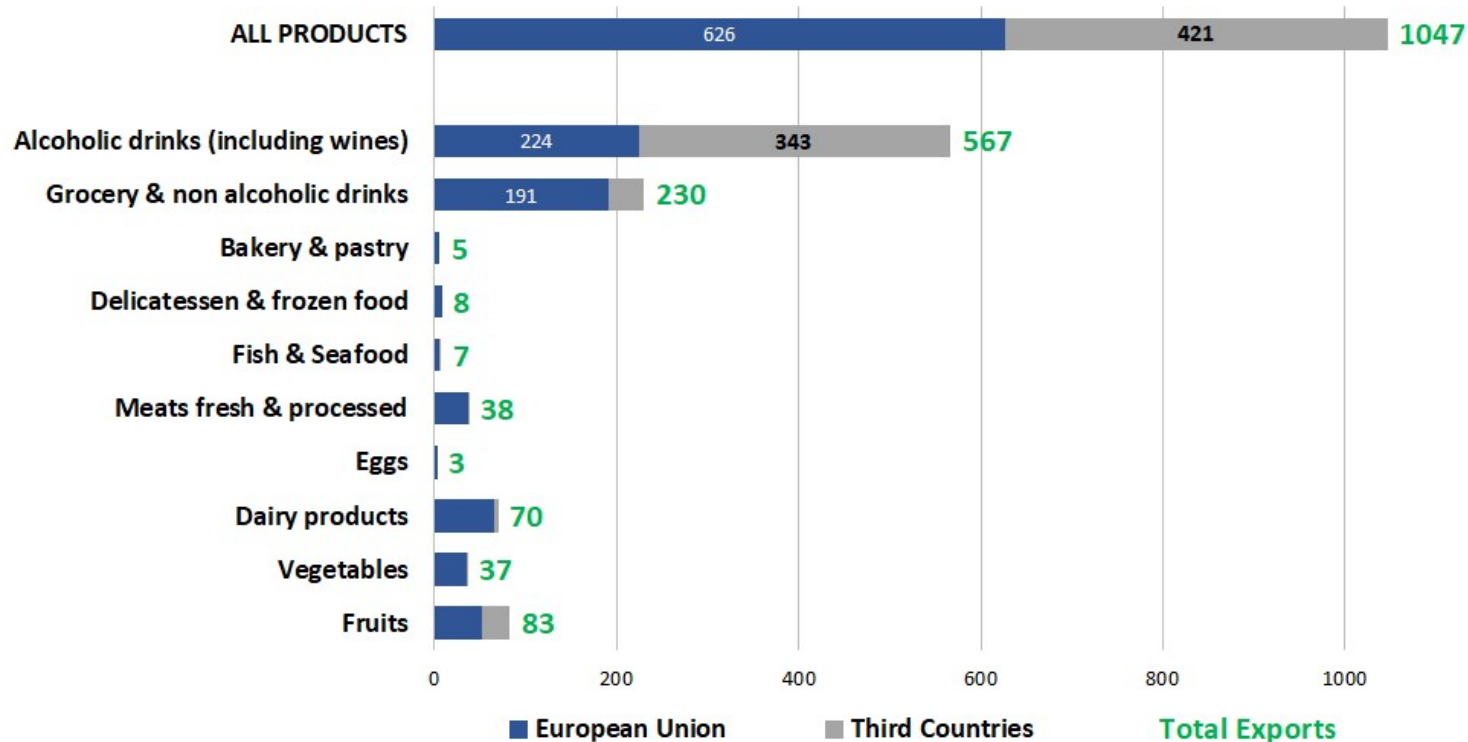


2021
32%
 of the whole sales value is imported
2,7B€

Imports share in 2019 & in 2020 : 33%

Source : Agence BIO/ AND-I 2022

EXPORT OF FRENCH ORGANIC FOOD



- organic exports : +18% in 2021 vs 2020
- organic wines exports : +14% in 2021 vs 2020
- Wines = 53% of organic exports in 2021

Source : Agence BIO/ AND-I 2022

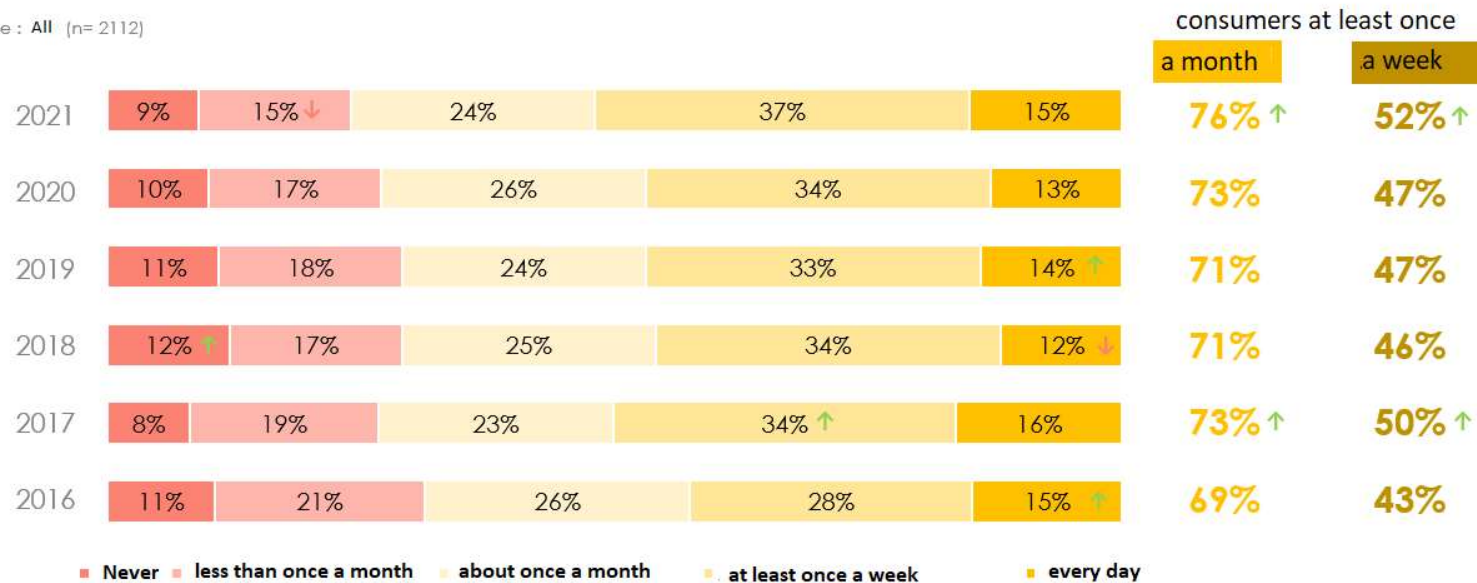
ORGANIC CONSUMERS IN FRANCE

Consumption frequency

Share of consumers of organic products

An increase driven by the most frequent consumers (at least once a week or even every day)

Base : All (n= 2112)



Have you consumed organic products in the last 12 months?



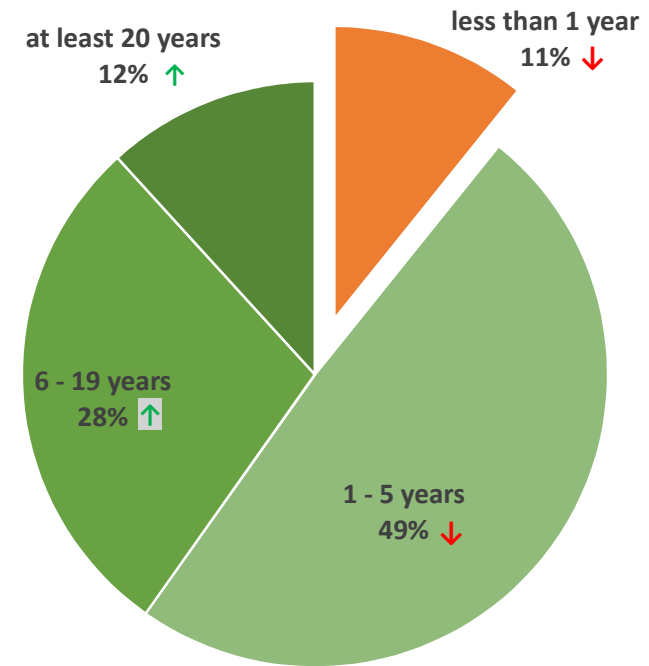
↑ ↓ significant rise/fall from wave to wave

Consumer's perception

Why buying organic ? And why not ?



60% of recent consumers



* New item

The main reason to consume organic food

The first motivation for the consumption of organic products remains the preservation of one's health.

Base: organic consumer at least once a month (n= 1602)

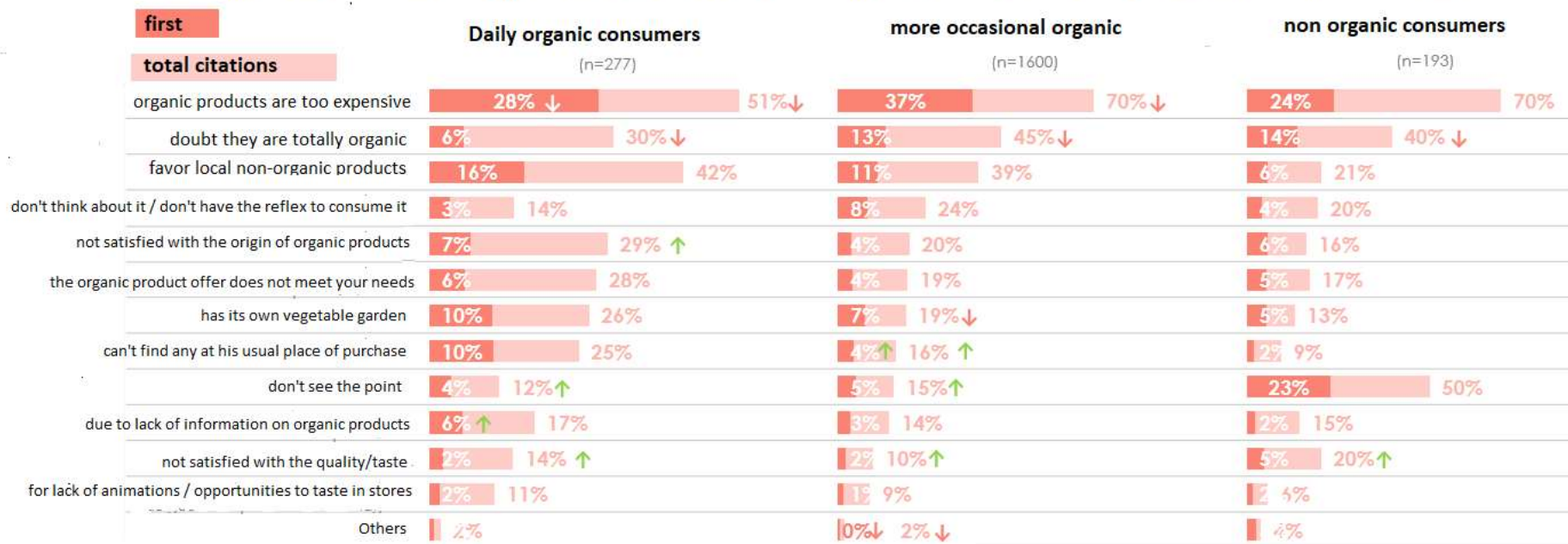


Now let's talk about the reasons that prompted you to consume organic products. What is the main reason that led you to consume organic products in the beginning?

↑ ↓ significant rise/fall from wave to wave

Hindrances to organic food consumption

The cost of organic products remains the major obstacle to greater / more frequent consumption of organic products, although it is declining among those who already consume. Note a dissatisfaction with the origin of products on the rise among the most regular consumers.



Why don't you consume more organic products?
Why don't you eat organic products more often?
Why do you not consume organic products?



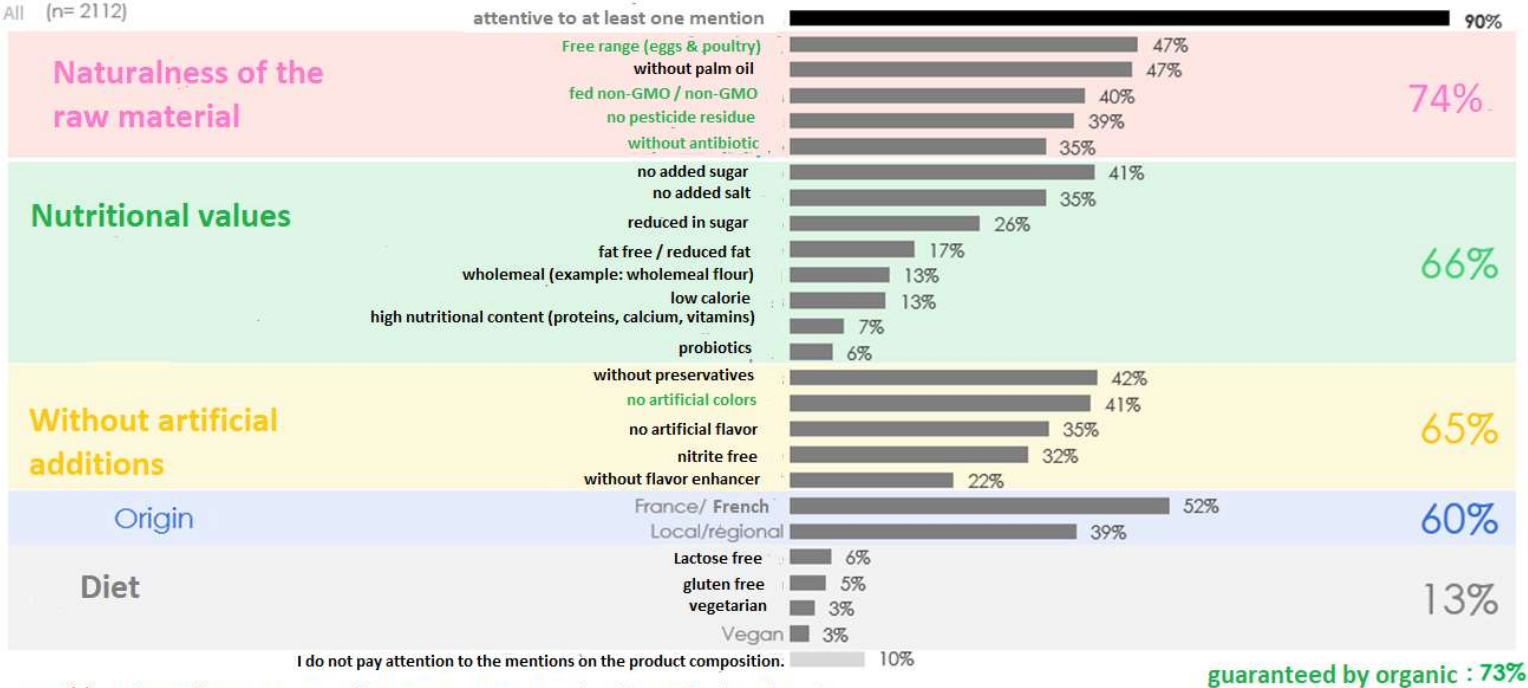
↑ ↓ significant increase/decrease vs 2020

2100912 – Agence Bio – Baromètre de consommation et perception des produits bioalimentaires en France – Édition 2022

Paying attention to mentions when purchasing food products

The French are mostly sensitive to mentions relating to the composition of the food products they buy, in particular those concerning the naturalness of the raw material (almost all guaranteed by the organic label). The French origin is the most sought after mention.

Base : All (n= 2112)



What mention(s) on the product composition do you pay attention to when buying food products?

Thank you !

Let's keep in touch



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