

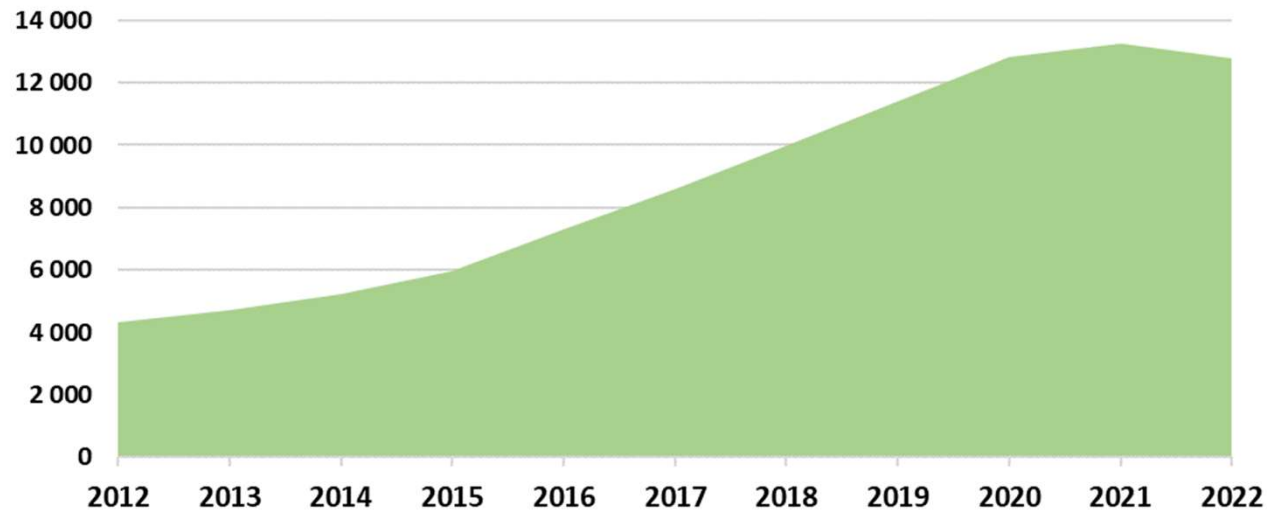


## The French Organic Market decreased in 2022

€ 12.08 Billion for retail ⇒ -4.6% vs 2021

€ 715 Million for canteens and restaurants (without VAT) ⇒ +17.4%

Evolution of the French Organic Market (€ Billion)

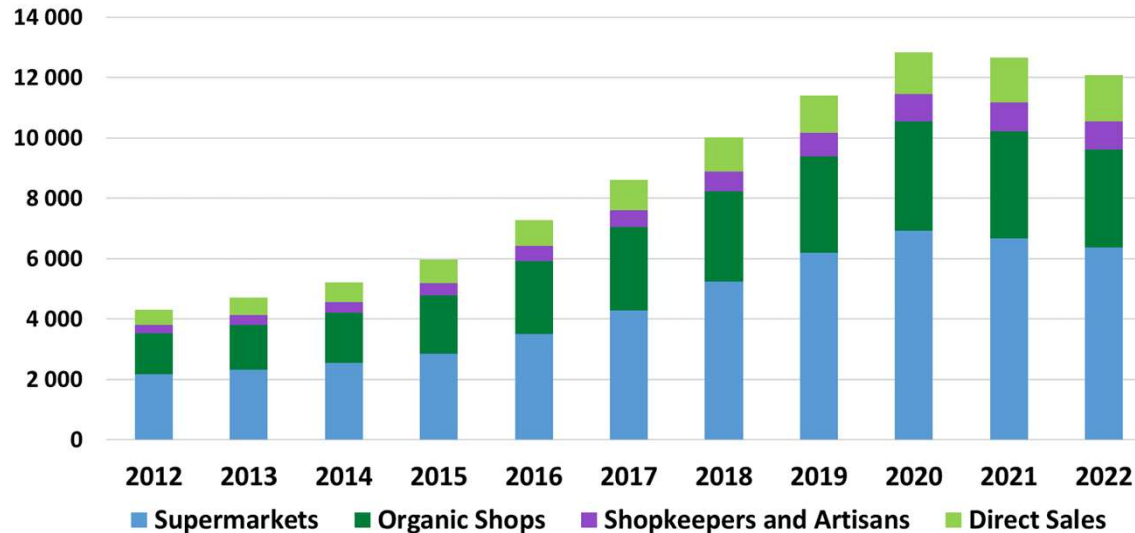


Source : Agence BIO/AND-I

## Organic Food in Retail in 2022

- 6.1% of food household consumption was organic

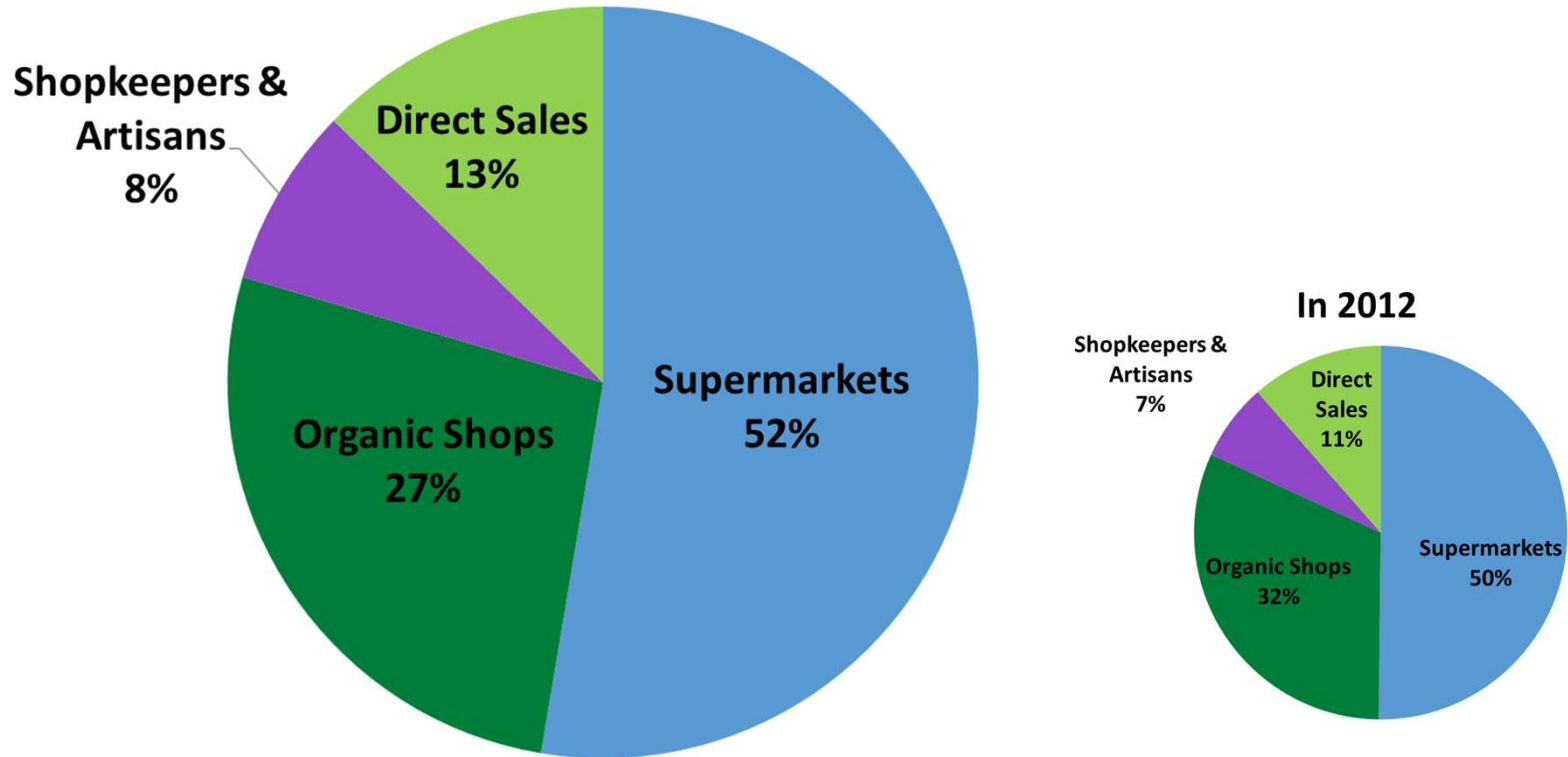
Evolution of organic food sales in retail (€ Million)



- Supermarkets : -4.6%
- Organic Shops : -8.6%
- Shopkeepers and Artisans : -2.6%
- Direct Sales : +3.9%

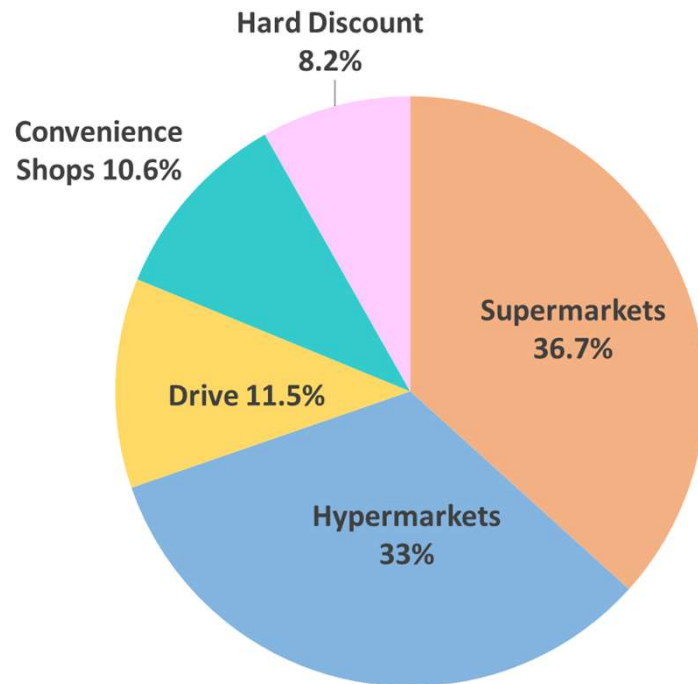
Source : Agence BIO/AND-I

## Channels Share in 2022



Source : Agence BIO/AND-I

## Organic Food in Supermarkets & other General Retailers in 2022



Source : Agence BIO/AND-I

- Supermarkets : -5.5% (decline of organic range and report on private labels)
- Hypermarkets : -6.1% (decline of organic range and report on private labels)
- Drive : -9.5%
- Convenience Shops : -2.5%
- Hard Discount : +11.0% (more customers and a broader organic range than in 2021)

## Organic Shops in 2022

- Decrease of sales (value) : -8.6% vs 2021
  - 3 086 shops at the end of 2022  $\Rightarrow$  -5.3% vs 2021
  - Closing of some organic chains like Les Nouveaux Robinson (Organic Pioneer)
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## ORGANIC AT SHOPKEEPERS & ARTISANS

- Decrease of Sales : -2.6% vs 2021
  - Wine Merchants = a big part of the sales
  - ¼ of bakers and butchers who used to sell organic and non-organic products, gave up organic in 2022.
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## DIRECT SALES OF ORGANIC FOOD

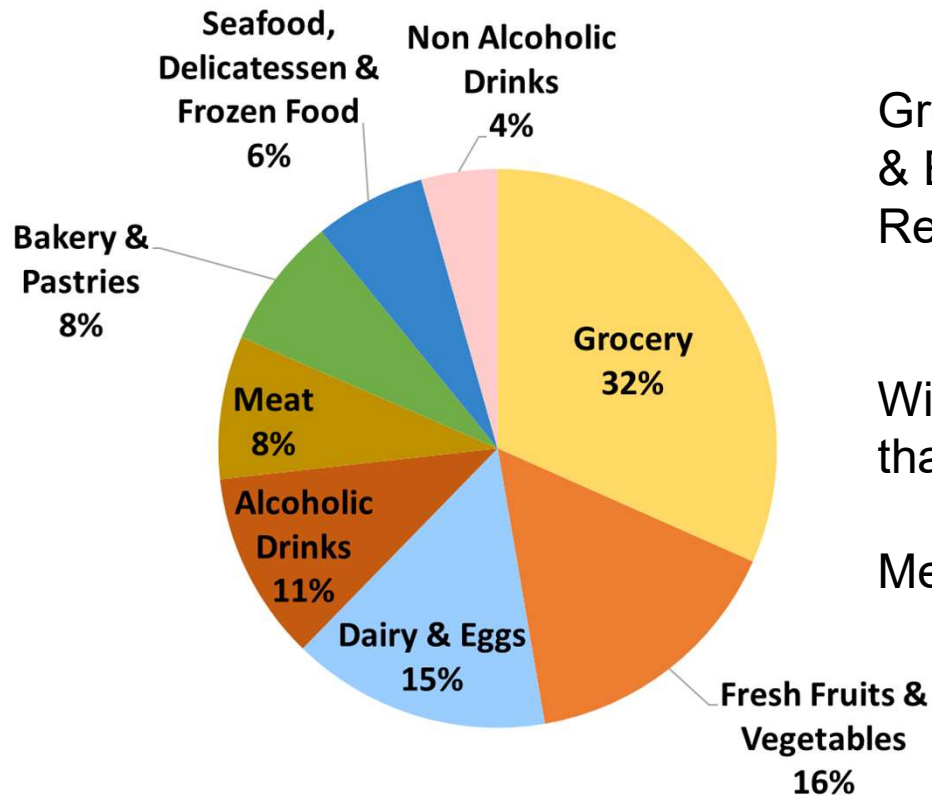
- Increase of the sales : +3.9% vs 2021, mostly due to wine sales
  - 43% of organic farms sold a part of their production directly to consumers (26 000 farms)
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## ORGANIC IN CANTEENS & RESTAURANTS

- Canteens :
    - purchases : € 445 million (without VAT)
    - +18.0% vs 2021
    - organic share = 7%
  - Restaurants :
    - purchases : € 270 million (without VAT)
    - +16.4% vs 2021
    - organic share = 2%
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## Products Share in Retail in 2022 (in value)



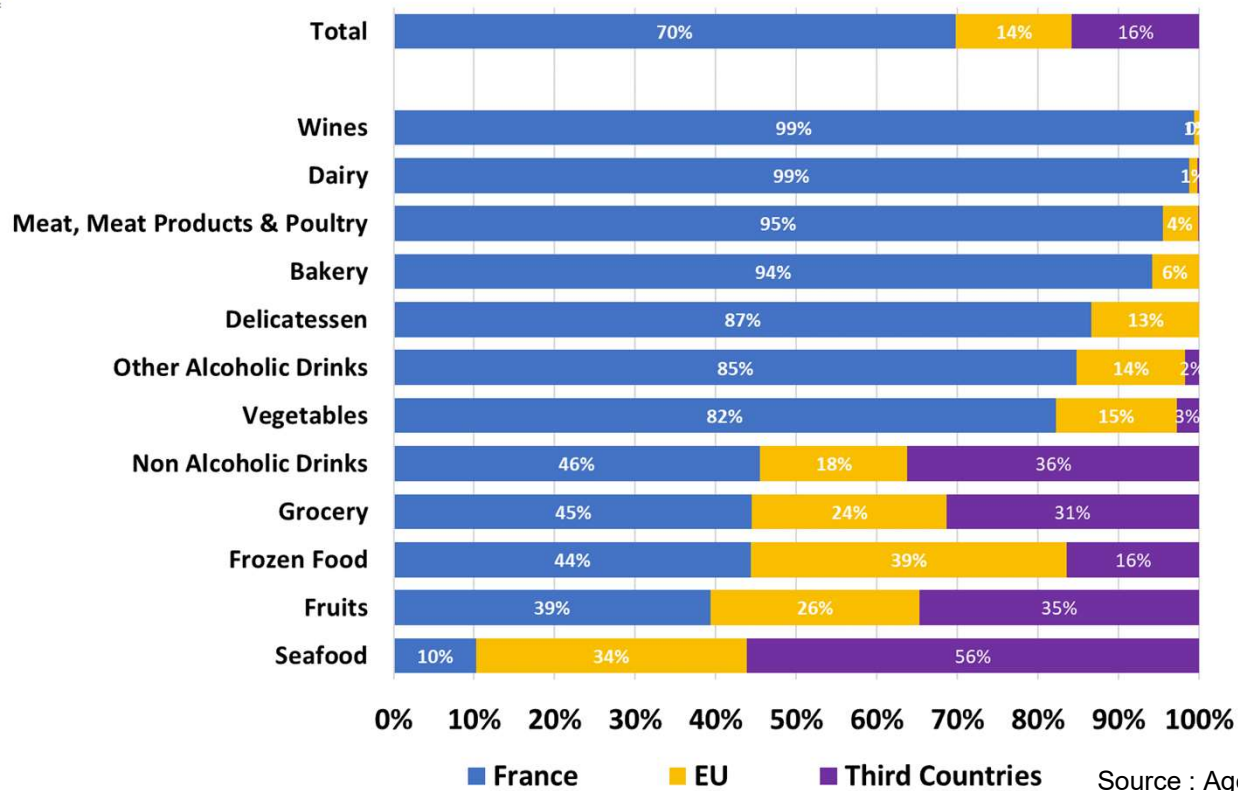
Grocery + Fresh F&V + Dairy & Eggs = 62% of Organic Retail Sales

Wines = The only category that increased.

Meat = the biggest decrease

Source : Agence BIO/AND-I

# Origin of organic food consumed in France



# The Organic Market in 2023

## Supermarkets, drive and convenience shops

- -2.6% for organic food products with fixed weight, with :
    - -1.8% for grocery products with fixed weight (without fresh products)
    - -5.2% for drinks
    - - 3.0% for fresh products with fixed weight
  - Continued decline of the organic range (like in 2022)
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# The Organic Market in 2023

## Organic Shops

- 2 826 Organic Shops late 2023  $\Rightarrow$  -8.5% vs 2022
  - sales area : 774 391 m<sup>2</sup>  $\Rightarrow$  -8.6% vs 2022
  - Increase of sales (value) : +1.1% vs 2022
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## Consumer's perception

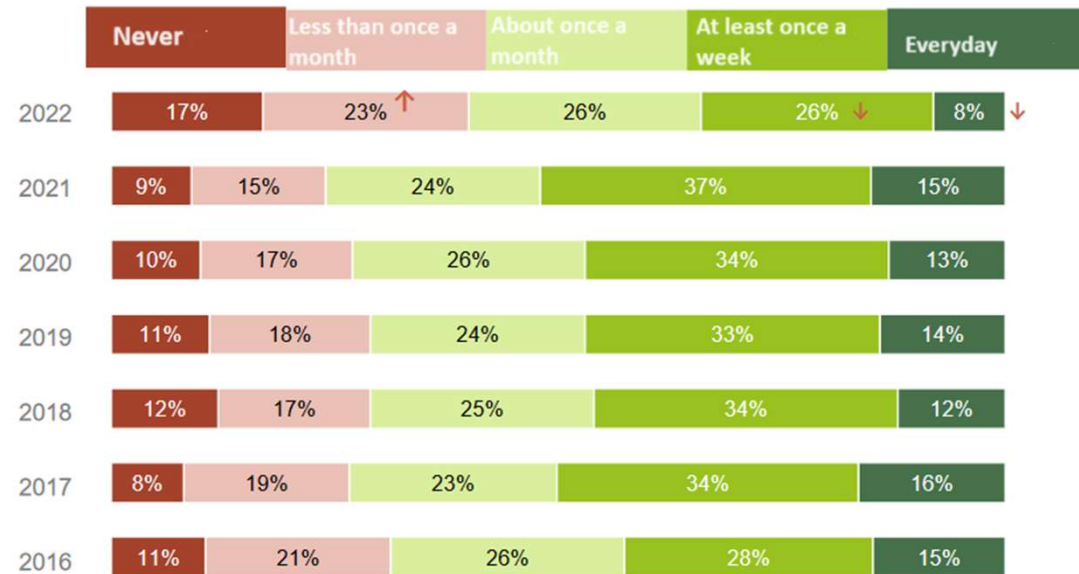
### Reduced attractiveness of organic :

- 83% of French people eat organic food at least once in 2022 vs 91% in 2021.

⇒ That means almost a doubling of people who never eat organic between 2021 and 2022.

- Decrease of the share of regular consumers

### Did you eat organic food in the last twelve months? n = 4 000

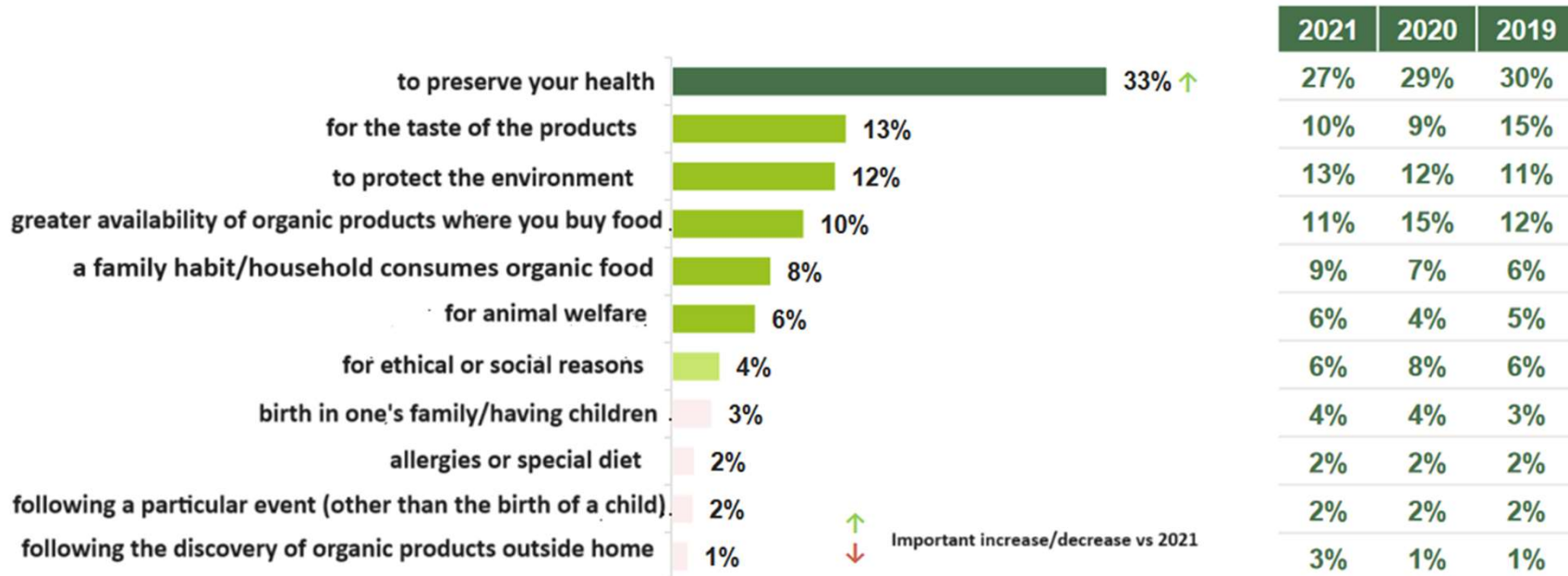


Source : Agence BIO/OSCOCO

# Consumer's perception

Why did you start to eat organic food ?

Regular organic consumers, n = 2 484

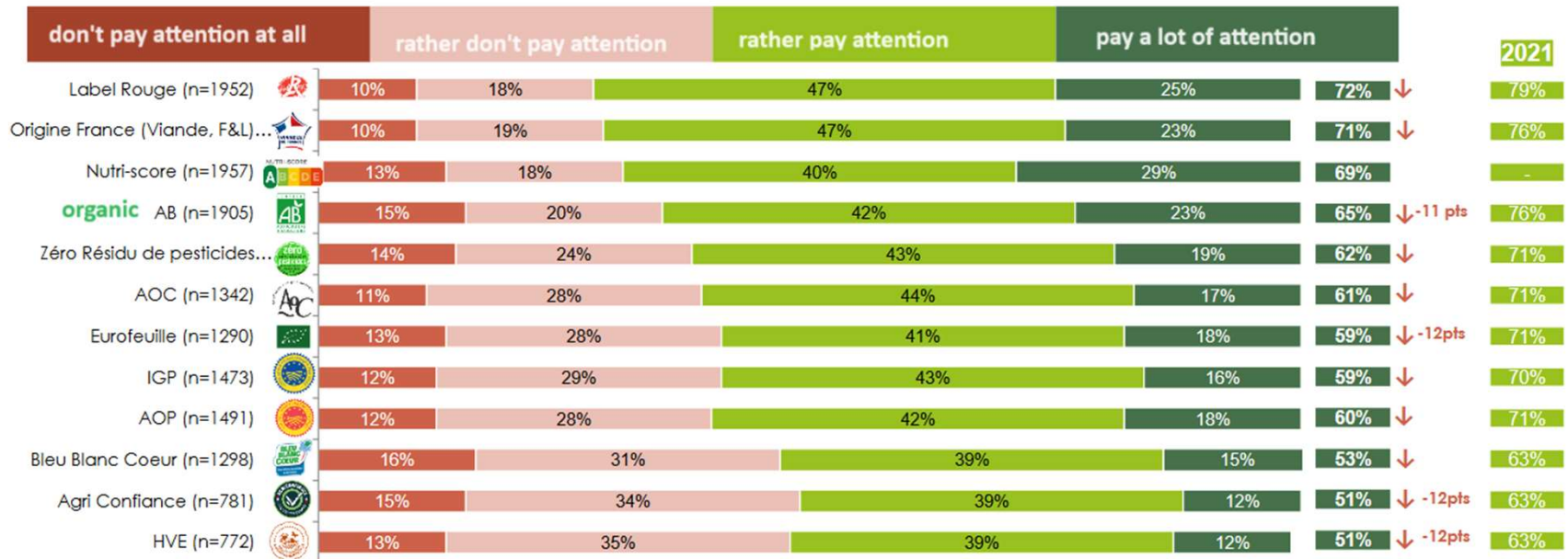


Source : Agence BIO/OSCOCO

# Consumer's perception

In 2022, French people paid less attention to logos when they bought food than in 2021.

Regarding these logos/labels/certifications, for each one, please indicate whether, during your food purchases, you are



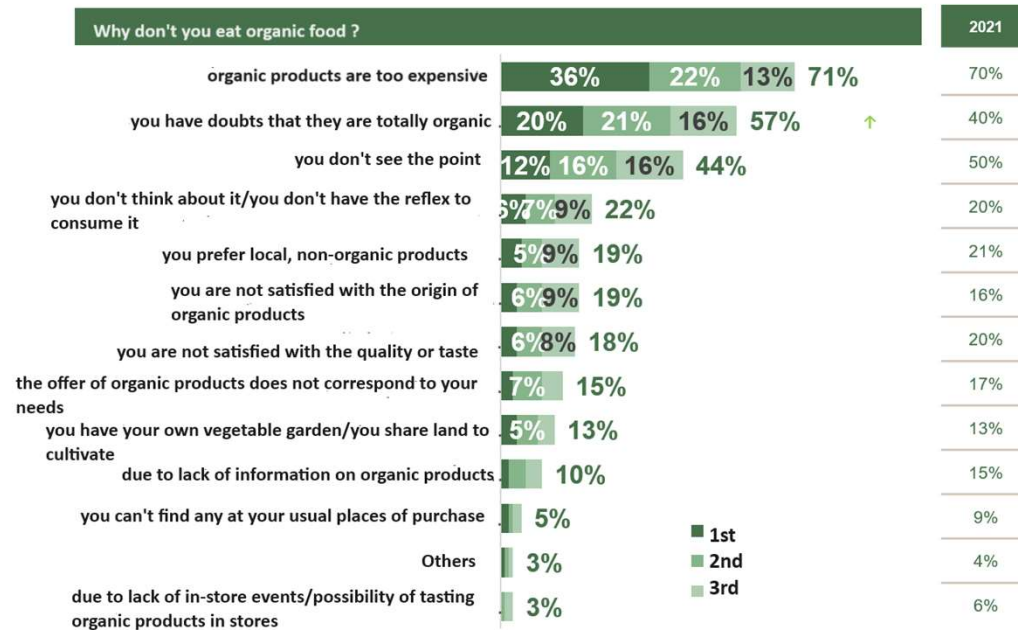
Source : Agence BIO/OSCOCO



## Main brakes

- 1) Price (+1 point vs 2021)
- 2) Doubts about the reality the product being organic (+17 points vs 2021)

⇒ A degraded quality-price image



Source : Agence BIO/OSCOCO

Thank you !

Let's keep in touch

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