

THE FRENCH ORGANIC MARKET IN 2023 & 2024

Laurence Foret-Hohn – Deputy Director of Agence BIO

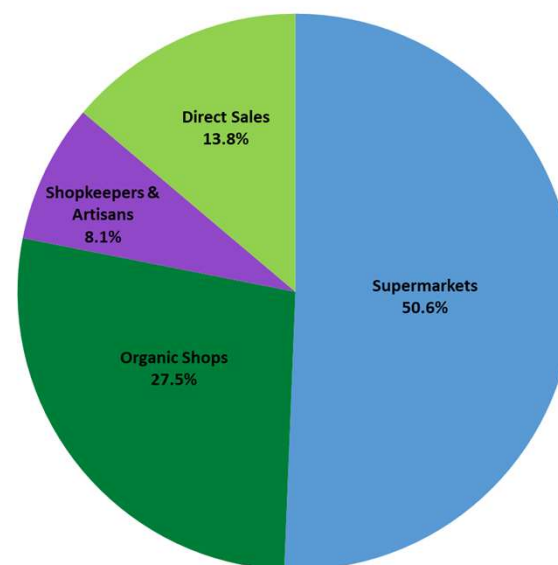
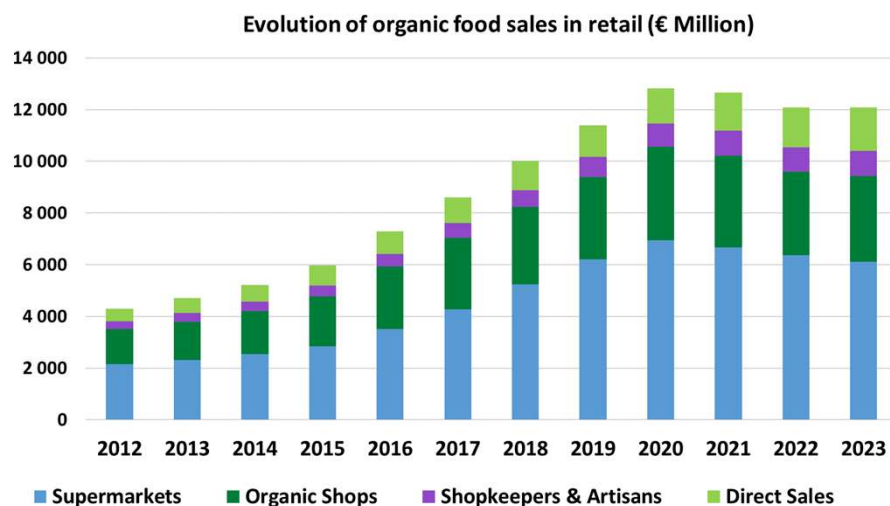


February, the 11th 2025

The French organic market was almost stable in 2023.

- EU inflation rate : 3.4% in 2023
- French inflation rate : 4.9%

€ 12.08 Billion for retail ⇒ +0.0% vs 2022



Source : Agence BIO/AND-I

Evolution of sales in distribution channels in 2023

- Supermarkets : -3.8%
 - Organic Shops : +2.2% (1/5th of shops closed in 2022 & 2023)
 - Shopkeepers and Artisans : +4.3%
 - Direct Sales : +8.7%
-

Home and out of home consumption of organic food

Household consumption = **91%** with over **8 billion** (wholesale price)

- **5.6%** of food household consumption was organic (↓: 6.1% in 2022)

Canteens & restaurants = **9%** of organic consumption with **787 million**
(wholesale price)

**Egalim : 20% of organic
food in public canteens**

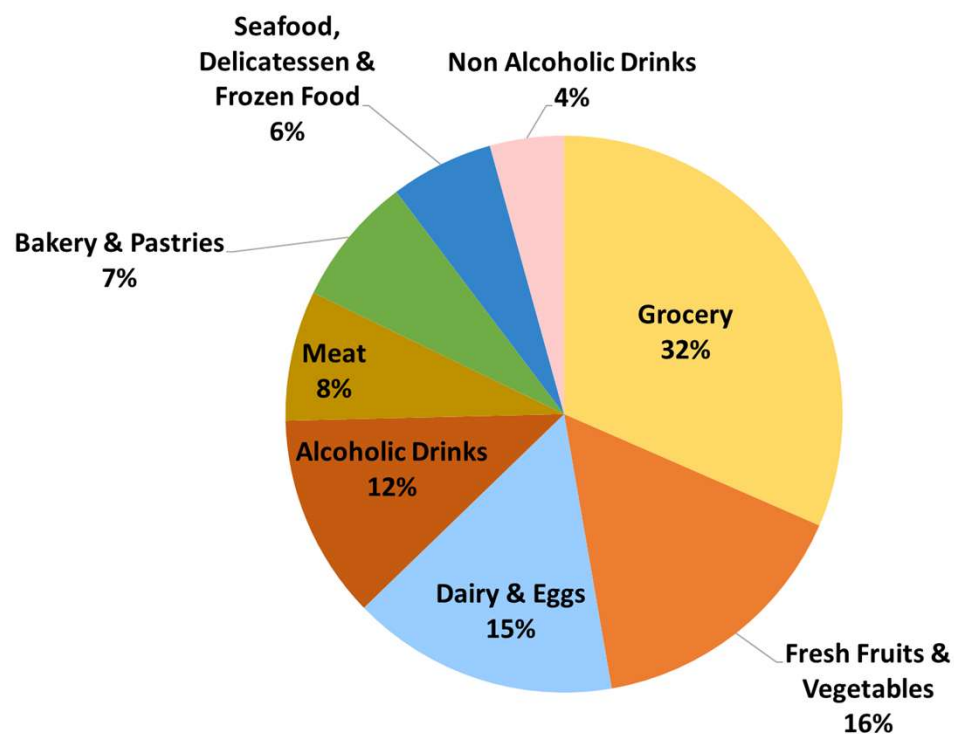
- Canteens :

- purchases : € 484 million (wholesale price) ↑ +9% vs 2022
- organic share = **6.2%** (vs 6.5% in 2022)

- Restaurants :

- purchases : € 302 million (wholesale price) ↑ +12% vs 2022
 - organic share = **1.4%** (like in 2022)
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Products share in retail in 2023 (in value)



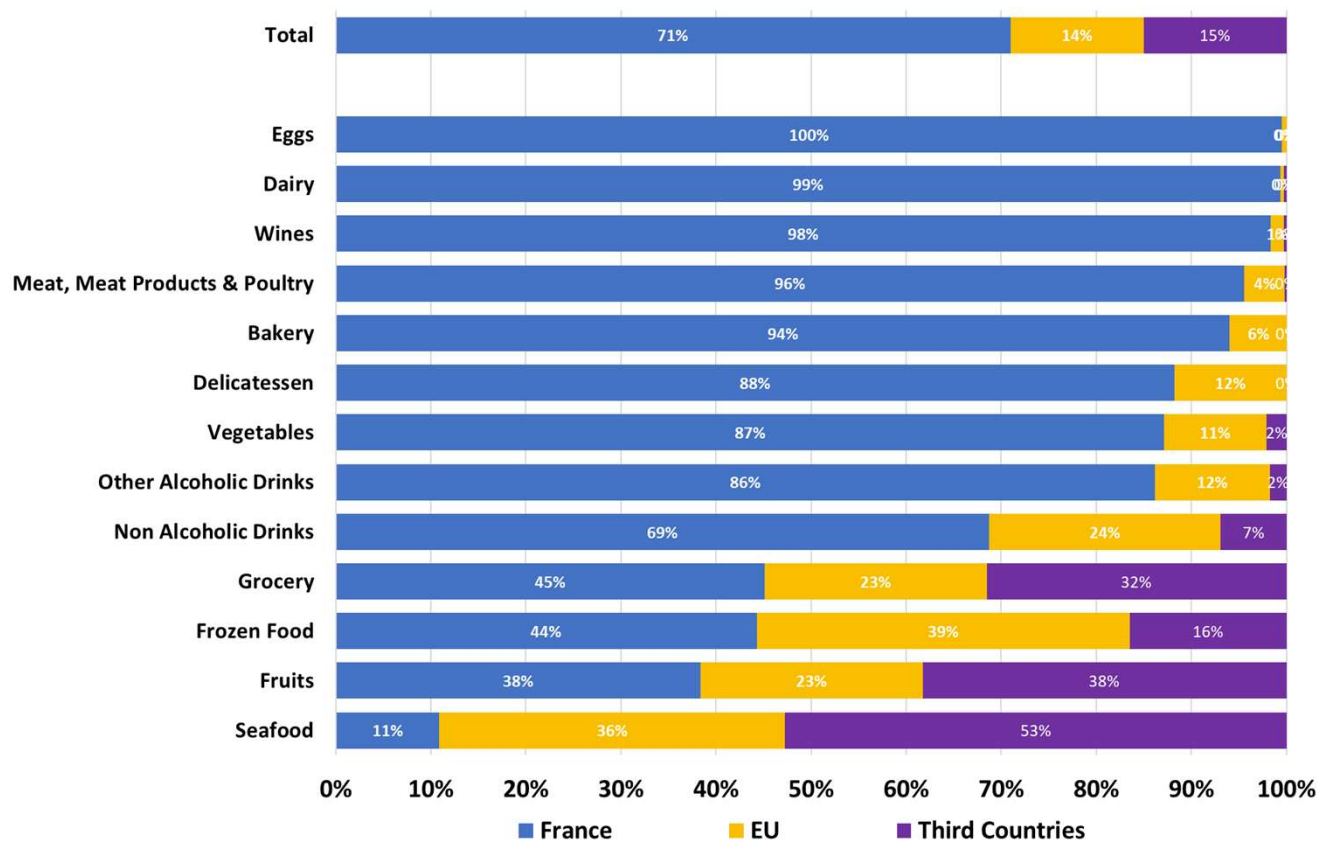
Source : Agence BIO/AND-I

Sales growth: alcoholic drinks (+8.4%), dairy & eggs (+3.3%) and Fresh Fruits & Vegetables (+0.4%)

Meat = the biggest decrease (-8.7%)

Grocery : almost stable (-0.2%)

Origin of organic food consumed in France



Source : Agence BIO/AND-I

Stabilization of the organic market in 2024

Provisional data

- The evolution of the organic market was very weak in 2024 vs 2023 : between -0.4% and +0.4%.
 - Increase of organic food sales in organic shops and directly by farmers
 - Decrease of sales in supermarkets and at **Shopkeepers & Artisans**
 - EU inflation rate : 2.7% in 2024
 - French inflation rate : 1.8%
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The organic market in 2024

Provisional data

General retailers (Supermarkets, hypermarkets, hard discount, drive, convenience shops and home deliveries) in 2024 :

- Decrease of organic sales in all kinds of general retailers (biggest decrease : hard discount with -7.8%))
 - -4.4% for organic food products with fixed weight in value
 - Decrease of the organic share in food sales of all categories vs 2023
-

The organic market in 2024

Provisional data

Steady decline of organic range in general retailers in 2024

- supermarkets : -7% %
 - hypermarkets : -8%
 - convenience stores : -3%
 - online : -8%
-

The organic market in 2024

Provisional data

Organic Shops

- Global increase of sales in value : **+8.3% for sales of organic food**
 - A decrease of the number in organic shops in 2024 :
-129 shops
 - Biocoop (43.7% of the organic shops' market with 741 shops/2 697): +8.4%
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Main data for organic production in 2024

Provisional data

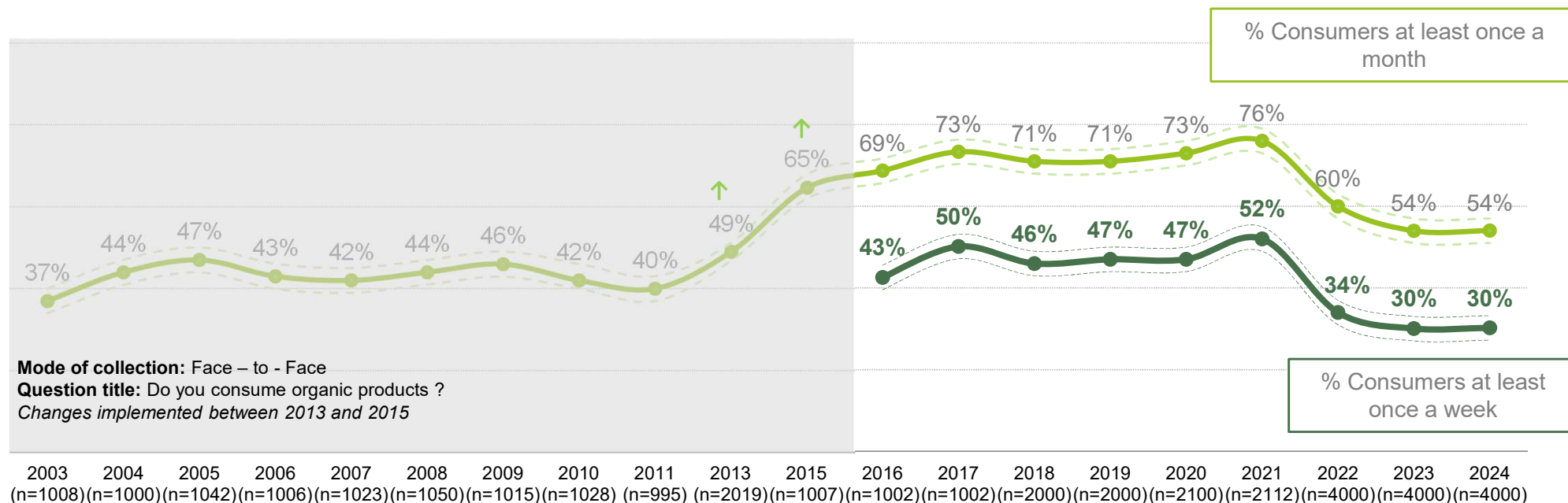
- The number of organic producers slightly increased vs 2023 : +0.8% 61,669, wh.
 - while the number of other organic operators decreased : -2.8%, reaching 25,530.
 - A decrease of the organically grown areas is expected for 2024.
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Consumption of organic products : stabilization of consumption in 2024

Provisional data

Have you consumed organic products in the last 12 months?

n=4006

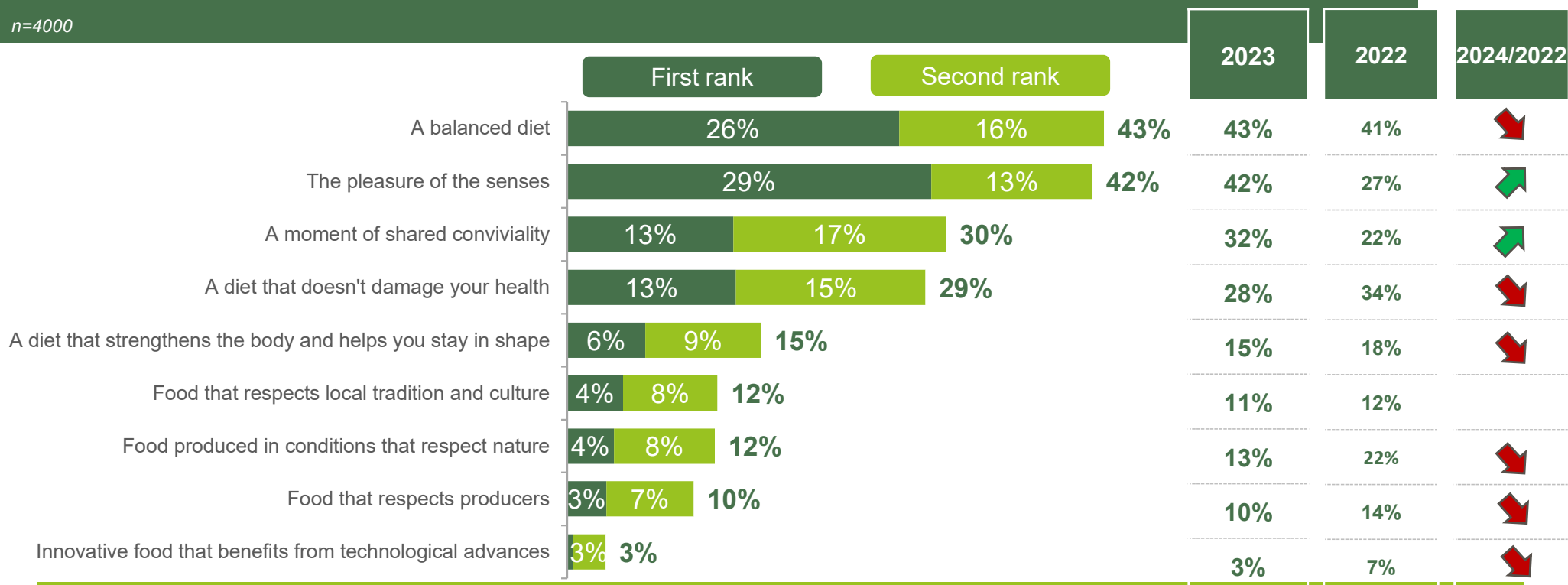


Representations of « eating well » : the importance of pleasure and conviviality in 2024

Provisional data

For you, “eating well” means above all :

n=4000



Thank you !

Let's keep in touch

laurence.foret-hohn@agencebio.org

question.observatoire@agencebio.org

www.agencebio.org
