FRANCE
ORGANIC SECTOR FACTSHEET
PRODUCTION/MARKET TRENDS & POLICIES

KEY INDICATORS

With 2,876,052 hectares under organic management, France ranked first in terms of area under organic management, and 17% of the EU's organic farmland was in France. With 10% of its farmland being organic, France was slightly below the EU average of 10.6%. Growth from 2001 to 2022 was at almost 600%, thus higher than in the European Union. Regarding organic retail sales, with 12,076 million euros, France held rank two in the EU in 2022. With 6.1%, it had an above-EU-average organic share of the total food market.

ORGANIC FARMLAND	2001	2022
Area* (Share of Total Farmland)	419,750 ha (1.5%)	2,876,052 ha (10%)
Area Growth from 2001 to 2022	585%	

ORGANIC LAND USE & AQUACULTURE	2001	2022
Arable Land* (Share of Total)	94,045 ha (0.6%)	1,589,609 ha (8.8%)
Permanent Crops* (Share of Total)	21,903 ha (2.1%)	224,024 ha (21.2%)
Grassland* (Share of Total)	275,105 ha (2.7%)	962,038 ha (10%)
Aquaculture Production (Share of Total)	N/D	8,955 t (4.7%) (2020)

ORGANIC OPERATORS	2001	2022
Producers (Share of Total)	10,364 (1.7%)	60,522 (15.2%)
Aquaculture Producers	N/D	60 (2017)
Processors	5,400	20,365
Importers	N/D	659

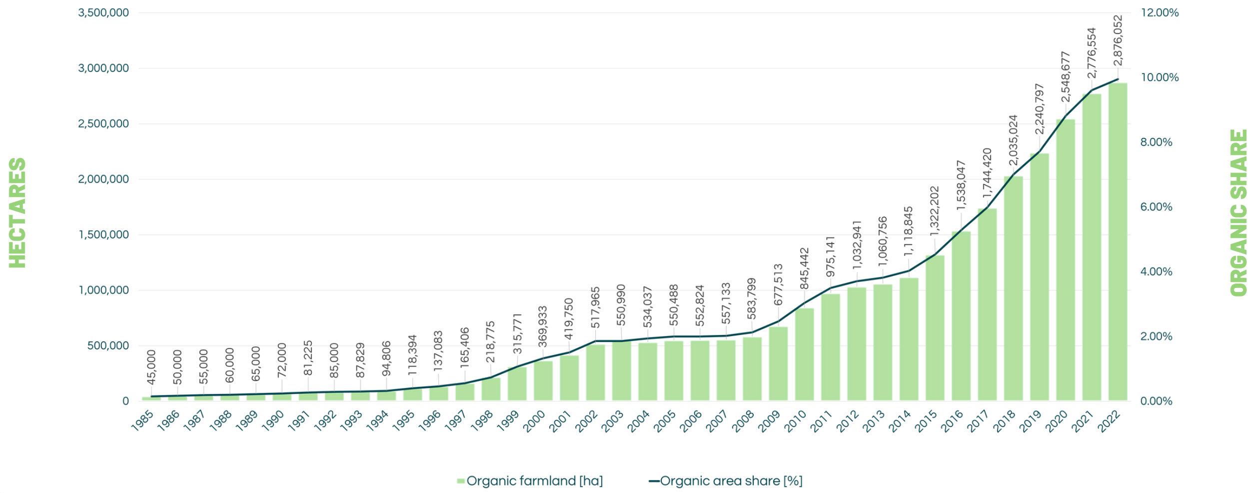
ORGANIC RETAIL SALES	2001	2022
Retail Sales (Share of Total)	1,150 M €	12,076 M€ (6.1%)
Per Capita Consumption	18.9 €	176 €
Retail Sales Growth from 2001 to 2022	950 %	
Imports	N/D	277,414 t

Source: FiBL survey based on national data sources, Eurostat and TRACES/European Commission in the framework of the OrganicTargets4EU project

**In conversion and fully organic*

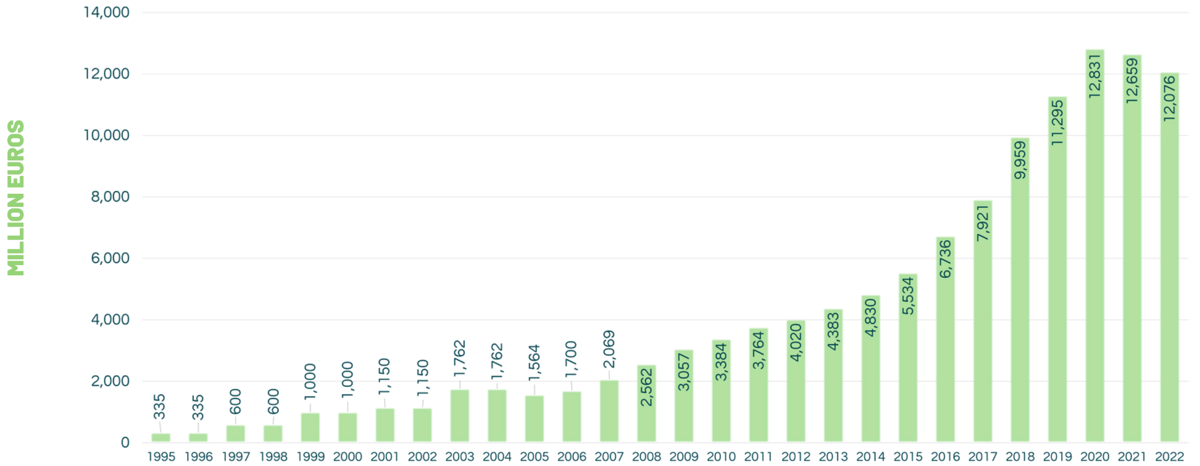
KEY INDICATORS

DEVELOPMENT OF ORGANIC FARMLAND IN FRANCE



Source: FiBL-AMI Survey, based on AgenceBio, Eurostat and Nic Lampkin

DEVELOPMENT OF ORGANIC RETAIL SALES IN FRANCE



Source: Agence Bio, Observatoire Bio

CAP ORGANIC POLICY SUPPORT

In the previous period, France halted maintenance payments, which contributed to the low share of certified organic land supported. In mainland France, support for maintenance was reintroduced as part of the national eco-scheme. This support was extended to land in conversion, in addition to the P2 conversion payments. The contrasting approaches to conversion and maintenance support lead to some very large differences in payments for some land uses. Although the expenditure per hectare is planned to remain relatively constant, the increased area supported is expected to lead to more than 3 times the annual expenditure compared with the previous period. Some regional governments and water agencies provide top-up support that is not included here.

CONVERSION & MAINTENANCE	2018	2027
Land Area Supported (Change from 2018)*	1,040 kha	3,384 kha (+225%)
Share of Total Agricultural Area Supported*	3.6%	11.7% (+225%)
Share of Certified Organic Area Supported (Change)*	51%	N/D
Expenditure per Year*	180 M€	603[1] M€ (+235%)
Expenditure per Hectare Supported*	173 €	178 € (+3%)

[1]Planned expenditure values for FR eco-schemes have been estimated from per hectare rates and R29 indicators

SHARE OF CAP RESOURCES	CAP EXP. 2023-2027	ORGANIC SHARE
Organic Farming Support (P1/P2)	2,725 M€	100%
Eco-Schemes (P1)	8,558 M€	24.2%
Agri-Environment, Climate, Welfare (P2)	2,718 M€	
Total CAP Expenditure	49,742 M€	5.5%

*Organic eco-scheme expenditure estimated from per hectare rates and R29 indicators. Regional top-up funding not included *including in-conversion and fully organic land*

CAP ORGANIC CONVERSION AND MAINTENANCE PAYMENTS FOR DIFFERENT LAND USES

INDICATOR	YEAR	FUND	GRASSLAND	ARABLE CROPS	HORTICULTURE	FRUIT CROPS	GRAPES
Conversion Support (€/ha)	2019	P2	130	300	450	900	350
	2023	P2+P1	130 / +110	350 / +110	450 / +110	900 / +110	350 / +110
Change from 2019 to 2023			0%	+17%	0%	0%	0%
Maintenance Support (€/ha)	2019	P2	0	0	0	0	0
	2023	P1/P2	110	110	110	110	110
Change from 2019 to 2023			∞	∞	∞	∞	∞
Conversion Support Higher than Maintenance	2019		∞	∞	∞	∞	∞
	2023	P2+P1	+118%	+318%	+409%	+818%	+318%

P1 (Pillar 1) European Agricultural Guarantee Fund (EAGF); P2 (Pillar 2) European Agricultural Fund for Rural Development (EAFRD) and national co-financing. P2 used for maintenance in Corsica and overseas territories. P2 maintenance in mainland France stopped from 2018. P1 eco-scheme also applies to land in conversion. Regional and water agency top-up funding not included.

Sources for pages 3 and 4
Lampkin N, Lembo G, Rehburg P (2024) Assessment of agricultural and aquaculture policy responses to the organic F2F targets. OrganicTargets4EU project Deliverable 1.2. Braunschweig: Thünen-Institut.
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NATIONAL ORGANIC ACTION PLAN

France has had three national organic action plans since the first one was published in 2011. The latest one was in preparation but not published at the time the analysis was undertaken. In the previous plan, particular emphasis was placed on training, research and market information actions.

TARGETS

	PERIOD	LAND AREA TARGET	OTHER TARGETS
Previous Action Plan	2018-22	15% of UAA by 2022	20% of public procurement by 2022
Current Action Plan	2024-30	Not yet available (18% of UAA by 2027 in CSP)	Not yet available

KEY ACTIONS

PREVIOUS ACTION PLAN (2015 - 2022)		CURRENT ACTION PLAN (2024 - 2030)
Increase support and awareness of different funding sources; support for group conversion, access to land, and for producers affected by external contamination; support organic development in overseas territories	**PRODUCTION**	Not yet available
Identify priorities for balanced sector development, consistent with other strategies; organise liaison meetings with relevant actors; develop tools to facilitate supply contracts to deliver 20% public procurement goal, incl. Best practic guidelines; increase organic in hospitality catering, including staff training; promote exports; clarify conditions for using the AB logo and relationship to organic and environmental certification; adaptation of regulations esp. relating to plant and animal health	**MARKETS**	Not yet available
Encourage consumption with promotion campaign led by Agence BIo; communicate characteristics and benefits of organic products; consolidate and facilitate access to technical, economic, ecological and social information for producers; integrate organic in sustainable production courses; multiple training initiatives; strengthen organic research, including in the INRA Metaprogramme, define new mandate for Organic Research Council; development of statistical information system by Agence Bio; complete process of geolocating organic land parcels to facilitate data exchange; regional market observatories	**INFORMATION**	Not yet available

AQUACULTURE

The organic share of total aquaculture production in France is almost 5%. Organic aquaculture has been supported as part of the EMFF (2014-2020) and EMFAF (2021-2027) operational programmes and the Multi-annual National Strategic Plan for Aquaculture, including investment aids, conversion support, promotion and research. Aquaculture was not highlighted in the previous national organic action plan. As the funding is project specific and there is no ring-fenced organic budget, statistics on organic aquaculture support expenditure are not available.

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