

THE FRENCH ORGANIC MARKET IN 2024 & 2025

Laurence Foret-Hohn – Deputy Director of Agence Bio



February 10, 2026

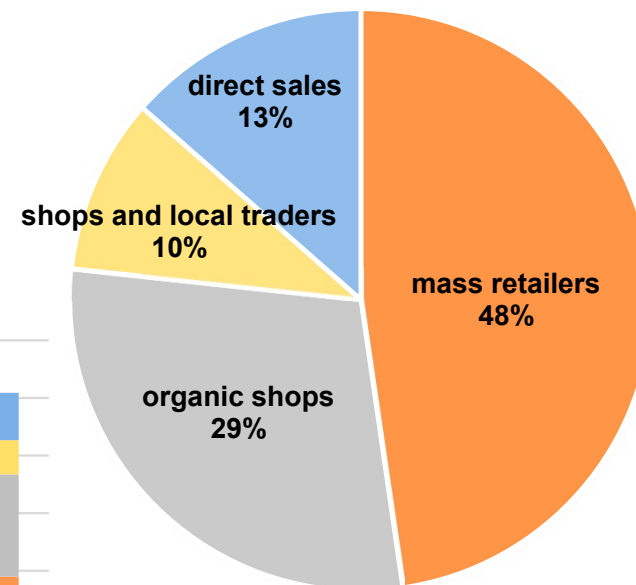
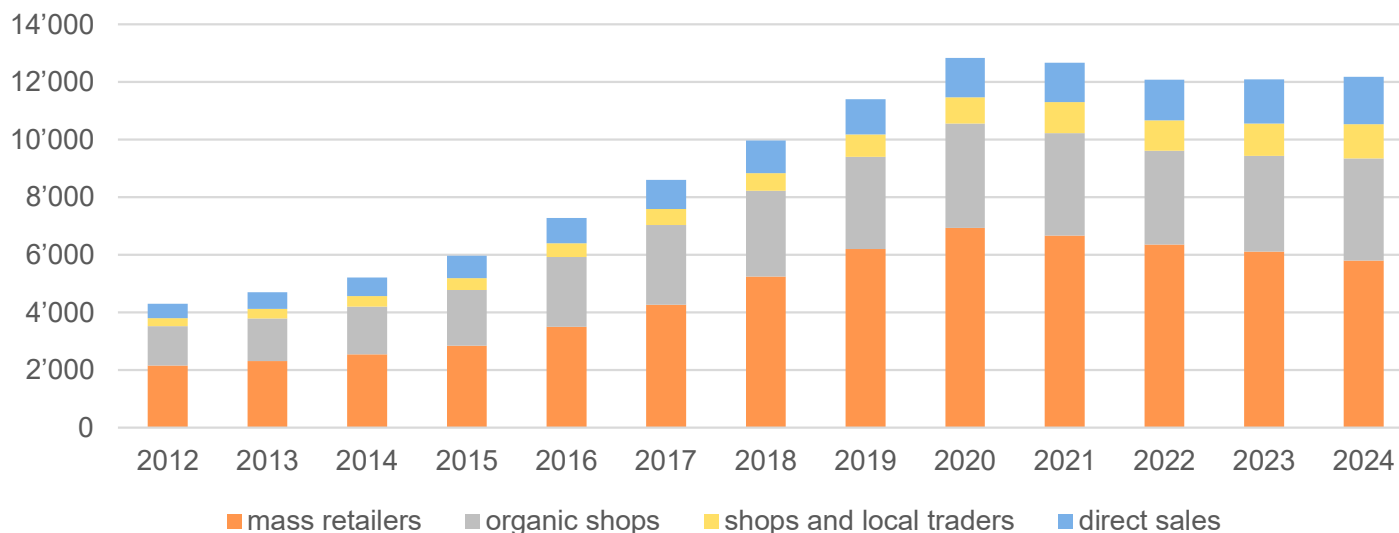
The French organic market was almost stable in 2024

Household consumption, without exportations

- EU inflation rate : 2.7%
- French inflation rate : 1.3%

€12.176 Billion for retail ⇒ +0.8% vs 2023

Evolution of organic food sales in retail (€ Million)

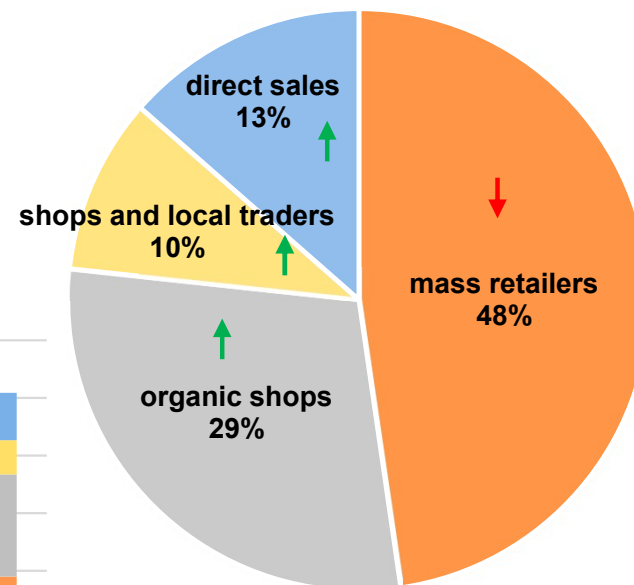
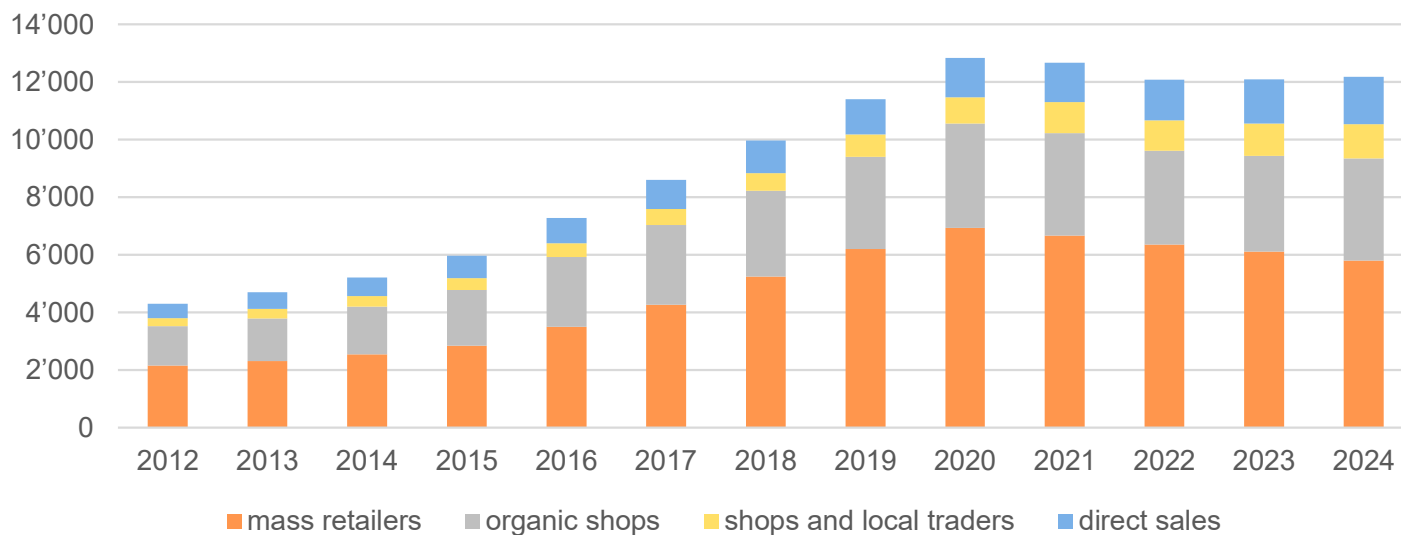


Source : Agence BIO/AND-I

Channels in 2024

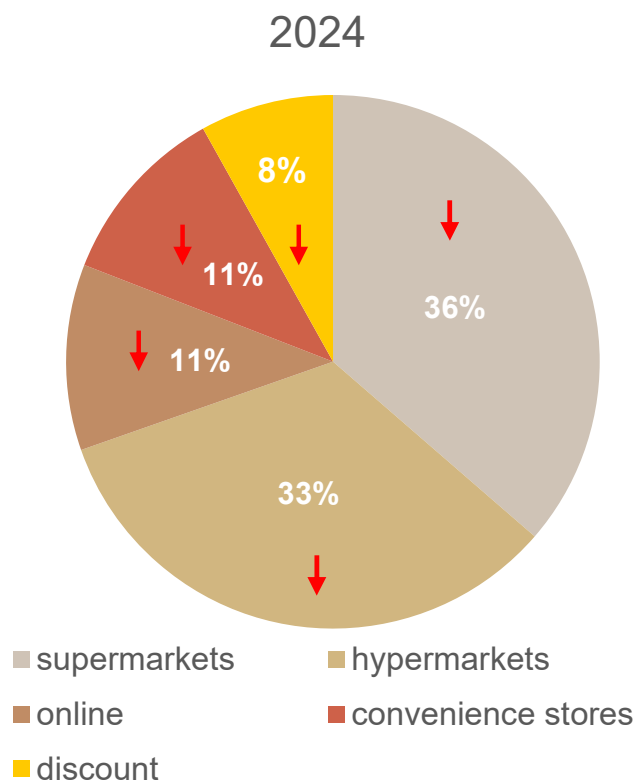
- Mass retailers : -5.1%
- Organic Shops : +6.5%
- Artisans-Craftmen : +7%
- Direct sales : +7.4%

Evolution of organic food sales in retail (€ Million)



Source : Agence BIO/AND-I

Focus on organic in mass retailers channels in 2024



Evolution

- Supermarkets : -7%
- Hypermarkets : -8%
- Online : -8%
- Convenience store : -3%
- Discount retailers: -8.5%

On a total of
€5 807 million of organic sales in 2024 by mass
retailers

Folie 4

LH1

5,8M€ de ventes bio en GMS sur 138M€ de CA alimentaire ? soit 4,2% ?

Laurence Hohn; 2026-01-31T09:43:34.669

MB1 0

tu parles de la part de bio dans le CA alimentaire des GMS ? si oui ça me semble cohérent oui

Marine Bré-Garnier; 2026-02-03T10:47:11.982

LH1 1

à la relecture j'ai un doute : il s'agit de la part du CA bio de chaque segment de GMS, et à droite : baisse de part ou de CA ?

Laurence Hohn; 2026-02-04T08:59:38.684

MB1 2

je vais mieux préciser sur la diapo, mais à gauche c'est le découpage du CA bio GMS (5 807 millions d'euros) entre sous circuits GMS (avec PDM), et à droite : d'évolution en valeur absolue

Marine Bré-Garnier; 2026-02-04T09:06:07.166

Home and out of home consumption of organic food

LH1

- In wholesale price :

Household consumption = **92%** with over **€8 billion**

5.7% of food household consumption was organic (vs 5.6% in 2023)

Canteens & restaurants = **8%** of organic consumption with **€847 million**

- Canteens :

- purchases : €516 million (wholesale price)
- +6% vs 2023
- organic share = **5.2%** (vs 6.2% in 2023)

EGalim goal : 20% of organic food in public canteens

- Restaurants :

- purchases : €331 million (wholesale price)
- +10% vs 2023
- organic share = **1.5%** (like in 2023)

Folie 5

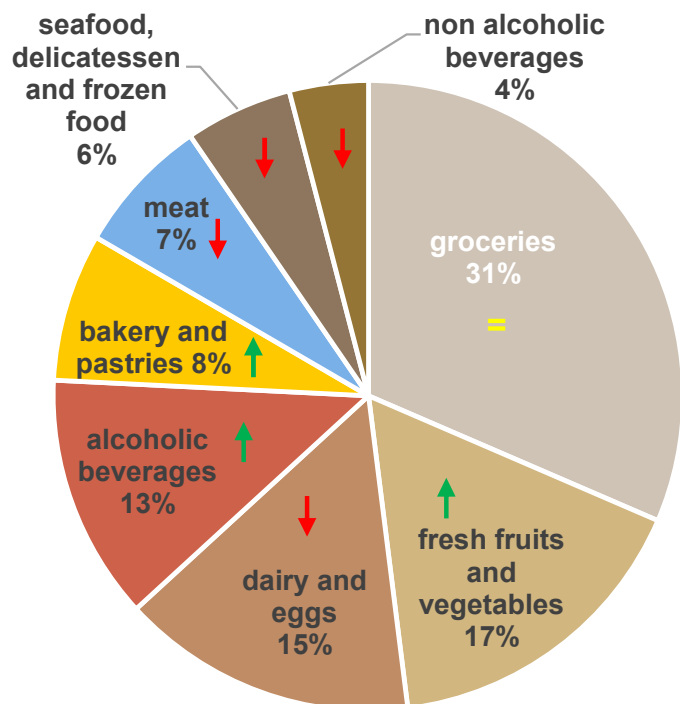
LH1

The denominator, that is to say, purchases in the restaurant sector, has increased sharply.

Laurence Hohn; 2026-02-04T09:02:08.083

Products share in retail in 2024 (in value)

Share



Evolution

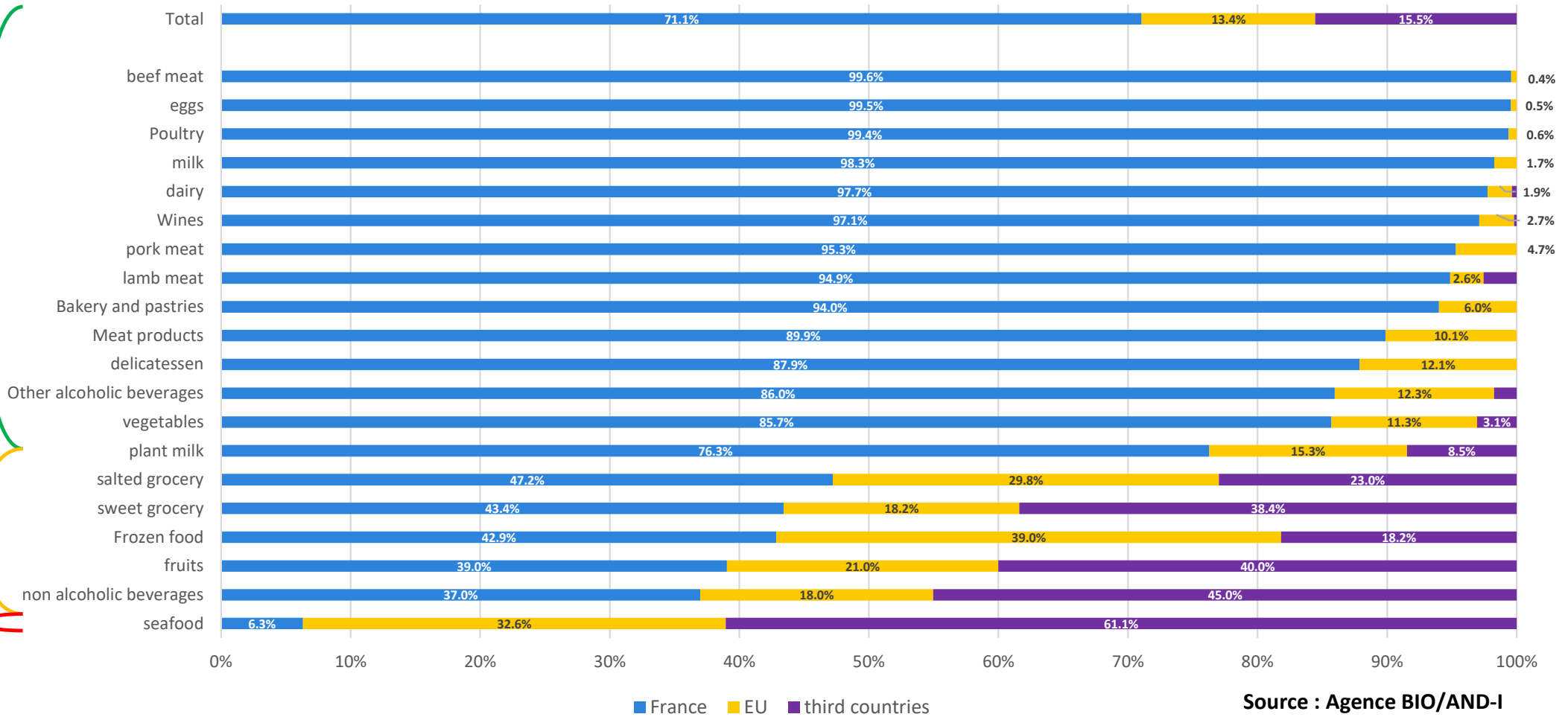
Sales growth: alcoholic beverages (+7,2%), fresh fruits & vegetables (+5,9%) and bakery and pastries (+1,5%).

Groceries : still stable (+0,6%)

Slight decrease : dairy & eggs (-1,2%)

The biggest decrease: seafood (-7,3%), meat products (-5,9%), non-alcoholic beverages (-5%).

Origin of organic food consumed in France



Source : Agence BIO/AND-I

Organic exports from France in 2024

- French organic exports : €1.164 billion € ⇒ +10 % vs 2023 and x 2.7 in ten years
- 57 % towards EU and 43 % to third countries
- Wines = 56 % of organic exports, grocery = 22% and fruits & vegetables = 10 %
 - Wines : €649 million (+17% vs 2023), i.e. 5.5% of French exports of wines
 - Champagnes = 60% of organic wines exported
 - 60% of organic wines exported towards third countries

Insights on the organic market in 2025

Provisional data

- EU inflation rate : 2.3%
- French inflation rate : 1.7%

- The organic market is indeed recovering in 2025 (vs 2024) : between +3% and +4% of growth (value).

- Steady increase of organic food sales in organic shops, at shops and local traders (provisional), and directly by farmers.

- Stabilization of sales in mass retailers (volume).

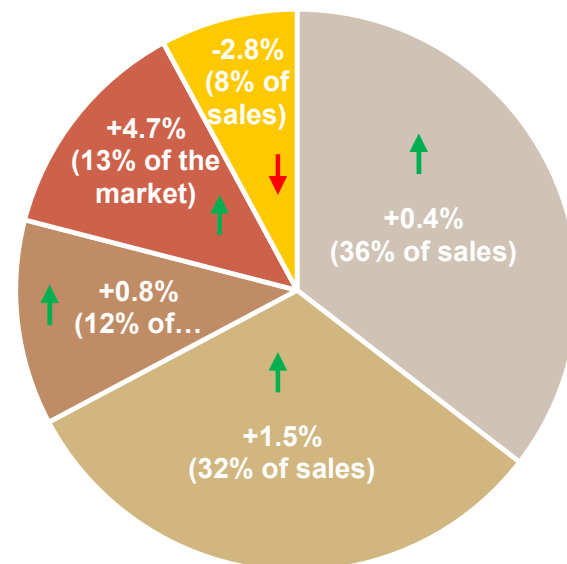
Sales stabilization of organic range in mass retailers in 2025

Provisional data

General retailers (*fixed weight products only*)

- +1.4% for organic food products with fixed weight in value
- Increase of organic sales in all kinds of general retailers, excepting discount.
- Stabilization of the organic share in food sales of all categories vs 2024

Organic sales represent 4.2% of mass retailers' sales (in value) vs 4.3% in 2024.



- supermarkets
- hypermarkets
- online
- convenience stores
- discount

Source : Agence BIO/AND-I

Mass retailers' private labels share in 2025

Fixed weight products only

Organic products

47,8% of private labels in organic sales
(+0.4 pts vs 2024, and +1.7 pts vs 2023)

- ➔ 58,9% of fresh products (-1.7 pts vs 2024)
- ➔ 42,7% of beverages (+3.1 pts vs 2024)
- ➔ 39% of groceries (+1.4 pts vs 2024)

VS non organic products

36.4%

47.2%

17.8%

31.9%

In value

Source : Agence BIO/AND-I

The organic market in 2025

Provisional data

Organic Shops

- Global increase of sales in value : **+7.8% for sales of organic food**
- A decrease of the number in organic shops in 2025 : -96 shops ⇒ total number : 2 601 late 2025
 - Biocoop (44% of the organic shops' market with 744 shops): sales : +7.4%
 - Naturalia (8.8% and 214 shops) : sales : +8.4% for the first 3 quarters
 - La Vie Claire (8% and 316 shops) : sales : +4.5%

Main data for organic production in 2025

Provisional data

- The number of organic producers is decreasing for the 1st time :
-1.2%, reaching 61 162.
- while the number of processors and retailers is still slightly decreasing : -1.5%,
reaching 24 717.
- A decrease of the organically grown areas is expected for 2025.
- France used to rank 1st for organically grown areas for 3 years (2020 to 2022). It is
now second behind Spain for 2 years.

LH1

Folie 13

LH1

Fance was overtaken by Spain in 2023 ?

Laurence Hohn; 2026-02-03T08:15:52.577

MB1 0

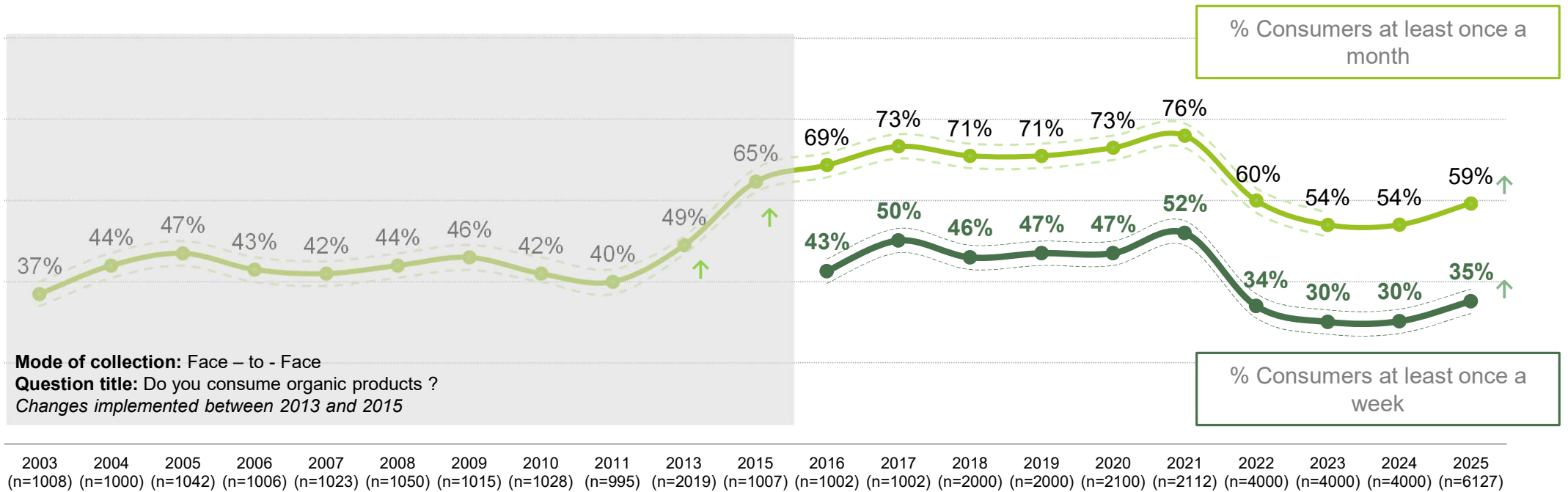
yes indeed !

Marine Bré-Garnier; 2026-02-03T10:47:41.575

Increase in the share of organic product consumers by 2025

Have you consumed organic products in the last 12 months?

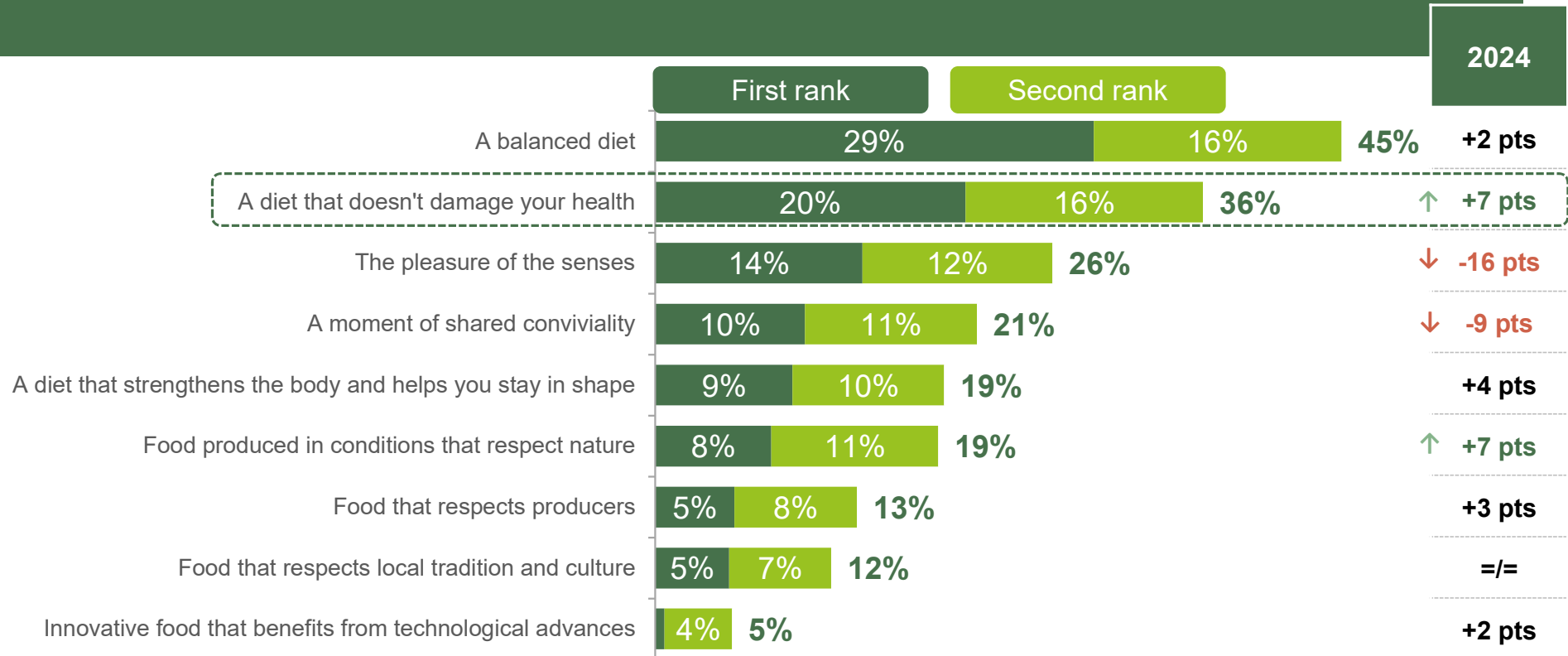
Base totale, n=6127



Health once again takes center stage in representations of “healthy eating,” to the detriment of sensory pleasure and conviviality.

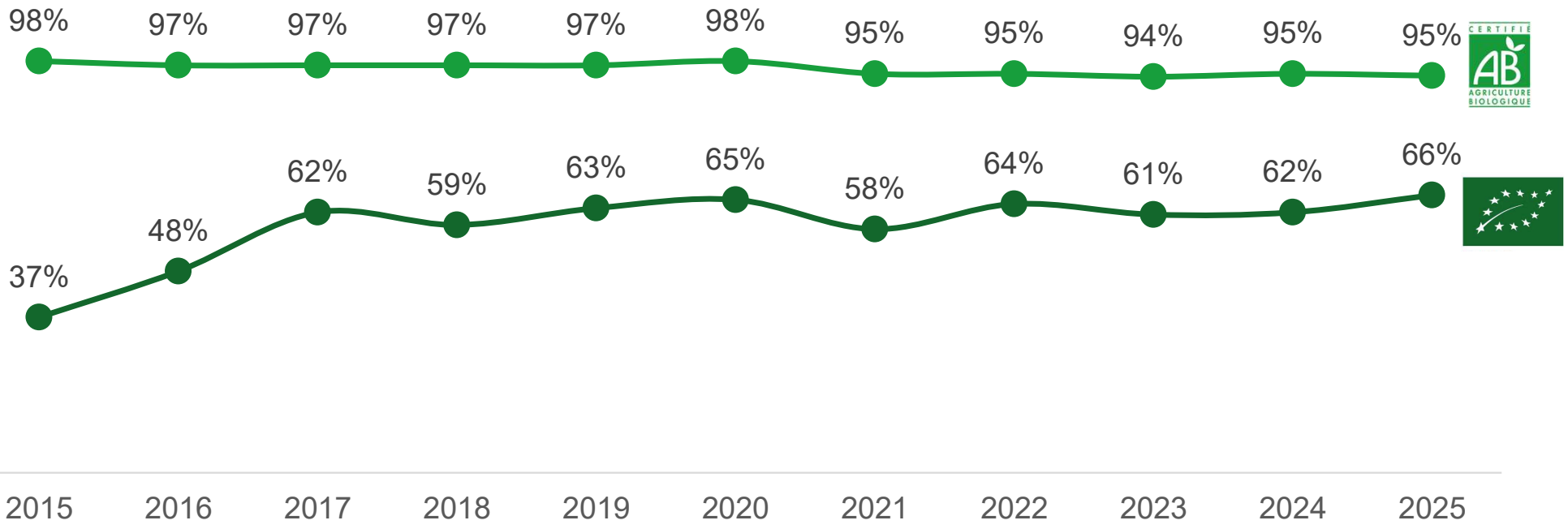
For you, “eating well” means above all :

n=6127



Evolution of knowledge about organic labels

Are you familiar with these two labels?
n=6127



Folie 16

LH1

comment on dit eurofeuille ?

Laurence Hohn; 2026-02-04T09:09:16.173

LH1 0

l'INAO l'appelle European organic logo

Laurence Hohn; 2026-02-04T09:11:23.737

Local food products vs. organic products

And in your opinion, do the following proposals relate more to organic food products, local food products, or both?

n=6127

	More on organic food products	More on local food products	To both	Neither one nor the other
Limit the use of pesticides and synthetic chemicals	37%	18%	35%	10%
Supporting biodiversity	21%	24%	44%	11%
Buy healthy products	16%	29%	49%	6%
Buy quality products	10%	35%	50%	6%
Treat yourself	5%	35%	52%	8%
Having a guarantee of product traceability	10%	36%	45%	9%
Buy products that taste good	8%	39%	47%	6%
Limit the carbon footprint of your food consumption	12%	36%	40%	12%
Buy fresh produce	6%	44%	45%	5%
Buy seasonal produce	7%	48%	41%	5%
Supporting France's food self-sufficiency	5%	48%	39%	8%
Supporting small farms	6%	57%	32%	5%
Promoting regional heritage	5%	60%	29%	6%
Buy affordable products	5%	42%	27%	27%

Thank you !

Let's keep in touch

laurence.foret-hohn@agencebio.org
question.observatoire@agencebio.org

www.agencebio.org

Our publications:

