

Nuremberg,  
February 13th 2013

**BIOFACH**

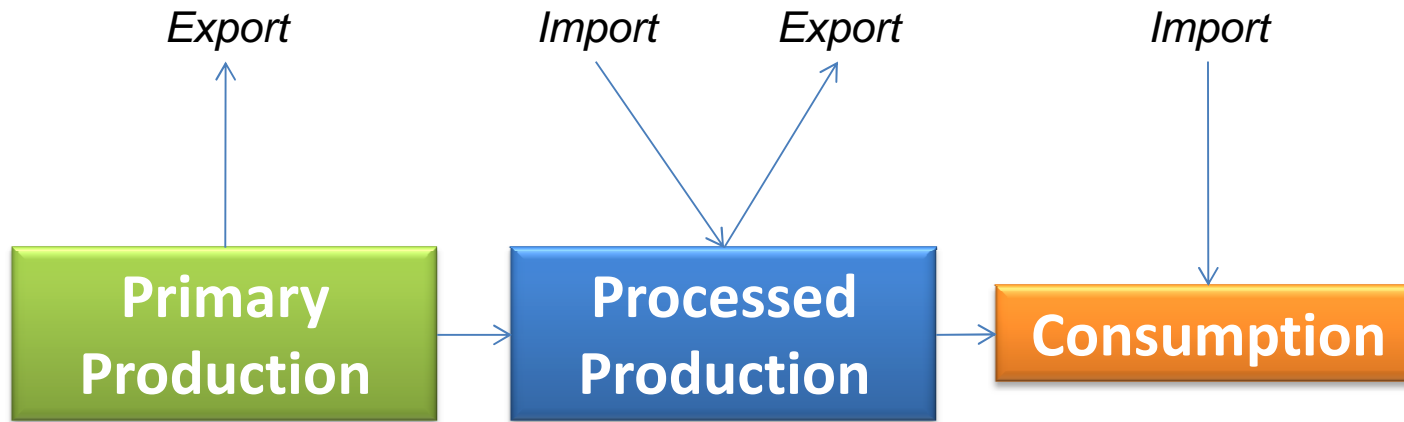
# THE FRENCH ORGANIC SECTOR

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## RECENT DATA AND METHODOLOGIES

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### Main associated data

Nb certified farmers  
 Certified area - anls  
 Volume  
 Value  
 Price

Nb certified processors  
 Volume  
 Value  
 Price

Value  
 Volume  
 Price

### Principal data qualification criteria

Sources  
 Coverage  
 Frequency

## Primary Production – key figures (end of 2011)

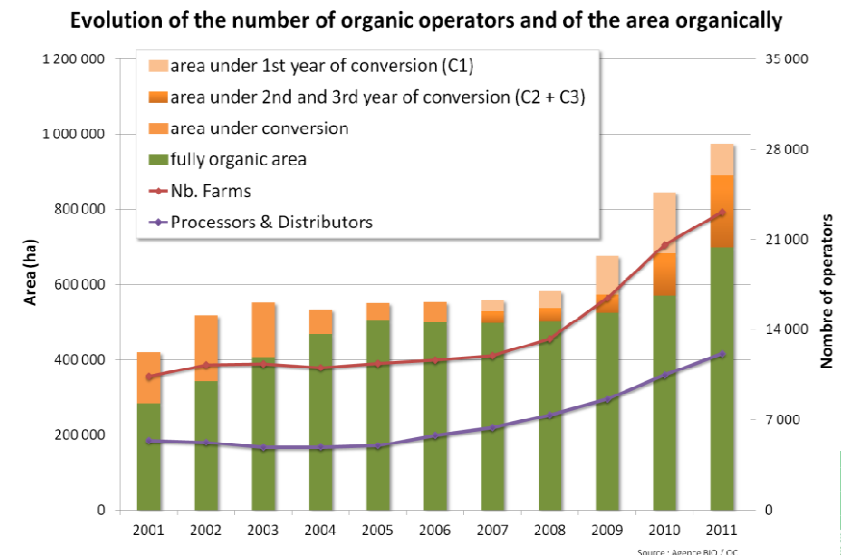
Main associated data	data qualification
23 135 farms (x1,9 / 2007)	Exhaustive / Quarterly
975 141 ha (x1,8 / 2007)	Exhaustive / Annual
3,56% of the land is organically managed (x1,8 / 2007)	Exhaustive / Annual
4,5% of the farms are organic (x2,1 / 2007)	Exhaustive / Quarterly
2,4 <b>annual labor unit</b> in organic farms (1,5 in conventional farms)	Exhaustive / 10 years with an annual update (on a sample)

### Other data :

**Volumes** – variable coverage and methodologies :

- work in progress based on average annual yield per products
- ex : coverage of 100% for the meat sector in organized chain (except poultry)

**Prices** – known for some products (daily basis)



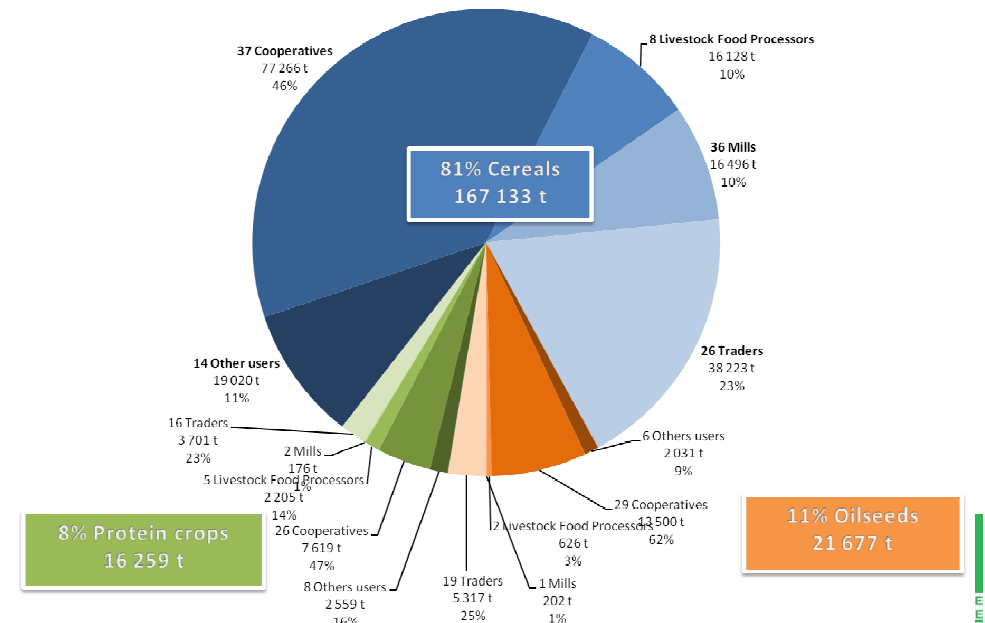
## Processed Production – key figures (end of 2011)

Main associated data	data qualification
12 136 <b>processors</b> (x1,9 / 2007)	Exhaustive / Quarterly
<b>Volumes</b> processed : 238 000 t of cereals/oilseeds/protein crops collected (+19% / n-1) 332 millions liters of milk collected (+20,5% / n-1) 20 330 t of bovine/ovine/porcine meat (+17% / n-1)	Exhaustive or more than 80% coverage for organized chain / Annual or monthly

### Other data :

**Values** – estimation of the revenue of companies aggregated at the type of product level (ex : bovine meat, liquid milk, fruits and vegetables).

Based on an annual survey.



## Consumption – key figures (end of 2011)

Main associated data	data qualification
3 755 M€ by the <b>household</b> (+11% / n-1) -Multiple retailers : 1 840 M€ -Specialist network : 1 327 M€ -Direct sales : 423 M€ -Other retailers : 164 M€	Exhaustive / Quarterly Survey / Annual Survey / Annual Survey / Annual
158 M€ of purchases by <b>collective catering</b> (+22% / n-1)	Survey / Annual

### Other data :

#### Values of groups of products consumption

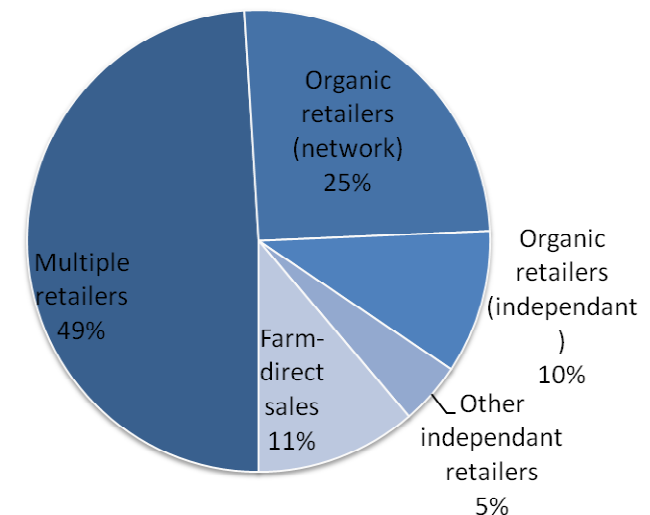
– Based on an annual survey.

#### Consumer habits :

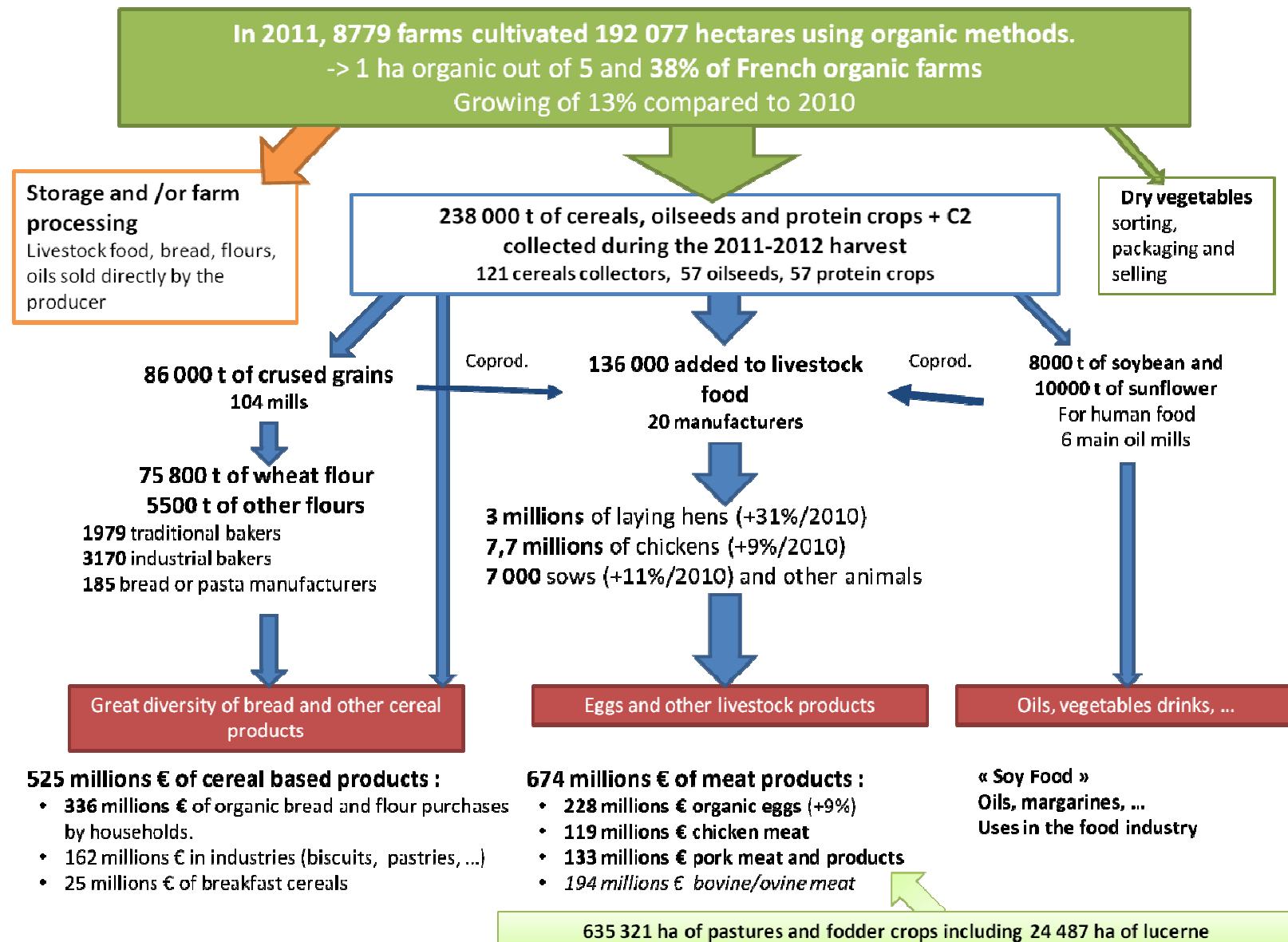
- Ratio of people consuming organic products regularly (4 out of 10 at least once a month)
- Site of consumption for different products
- Types of organic products bought
- Perception of the prices of organic products
- Knowledge of organic logos...

Based on an annual survey.

Distribution of the French organic retail market in 2011



## Example of a sector representation – arable crops



# Export/Import – How to improve the data

## Definitions :

Importation : coming from outside of France

Exportation : going outside of France

## Current methodology and results :

### Annual survey :

- Volumes and values of products imported and exported by processing companies and imported by distributors
- Data collected at wholesale and retail level then extrapolated at the end product category
- Regarding the fruit and vegetable sector an estimation of the importation for re-exportation is done

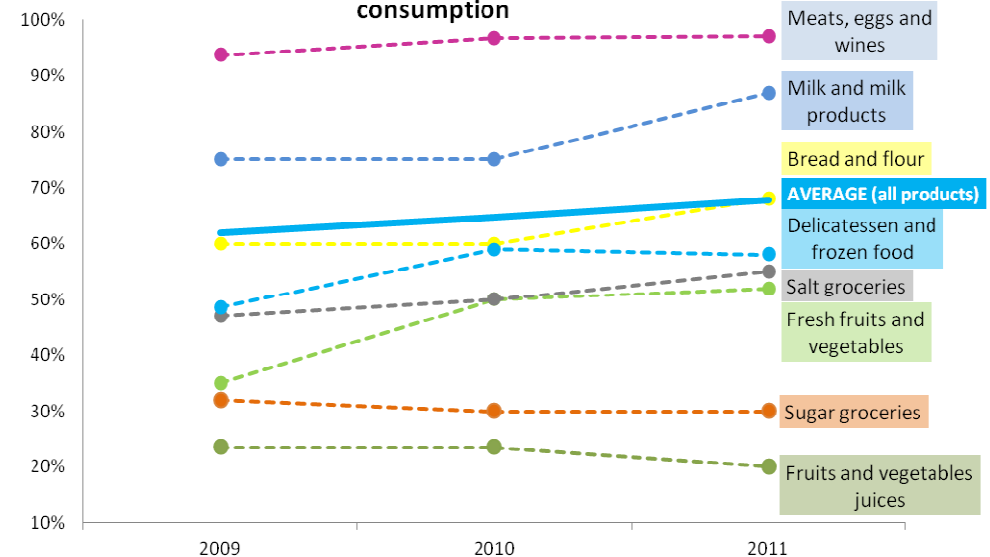
### Monthly survey :

- Done for some products by our partners (ex : flours, etc...)

### Results :

- Variable quality in the data given by the companies
- Allows to estimate the import / export values but the volumes are more difficult to assess

Evolution of the share of French products in the total value of consumption



## Export/Import – How to improve the data

### Improvements in progress :

- Increasing the quality of the survey responses : systematic telephone interviews for selected key companies (over 2 millions € of turn over)
- Specific surveys (import/export) for important sectors : fruits and vegetables, wine, animal feeding (oilcake import) ...
- A work with French customs is about to start to assess the possibility to evaluate organic volumes coming from outside EU to France.



**Thank you for your attention**

Find all the statistics of this presentation  
and more at :

[www.agencebio.org](http://www.agencebio.org) section “La bio en chiffres”

Meet us on the Sopexa – French delegation  
stand :

Hall 1, n°1-410f