



The French organic food market

Êva Lacarce
French organic farming Observatory

Biofach 2017, European Market

Agence Bio

French national platform for the promotion and the development of organic farming and organic food

- MAAF Ministry of food and agriculture
- MEEM Ministry of Environment
- FNAB
- APCA
- Coop de France
- Synabio



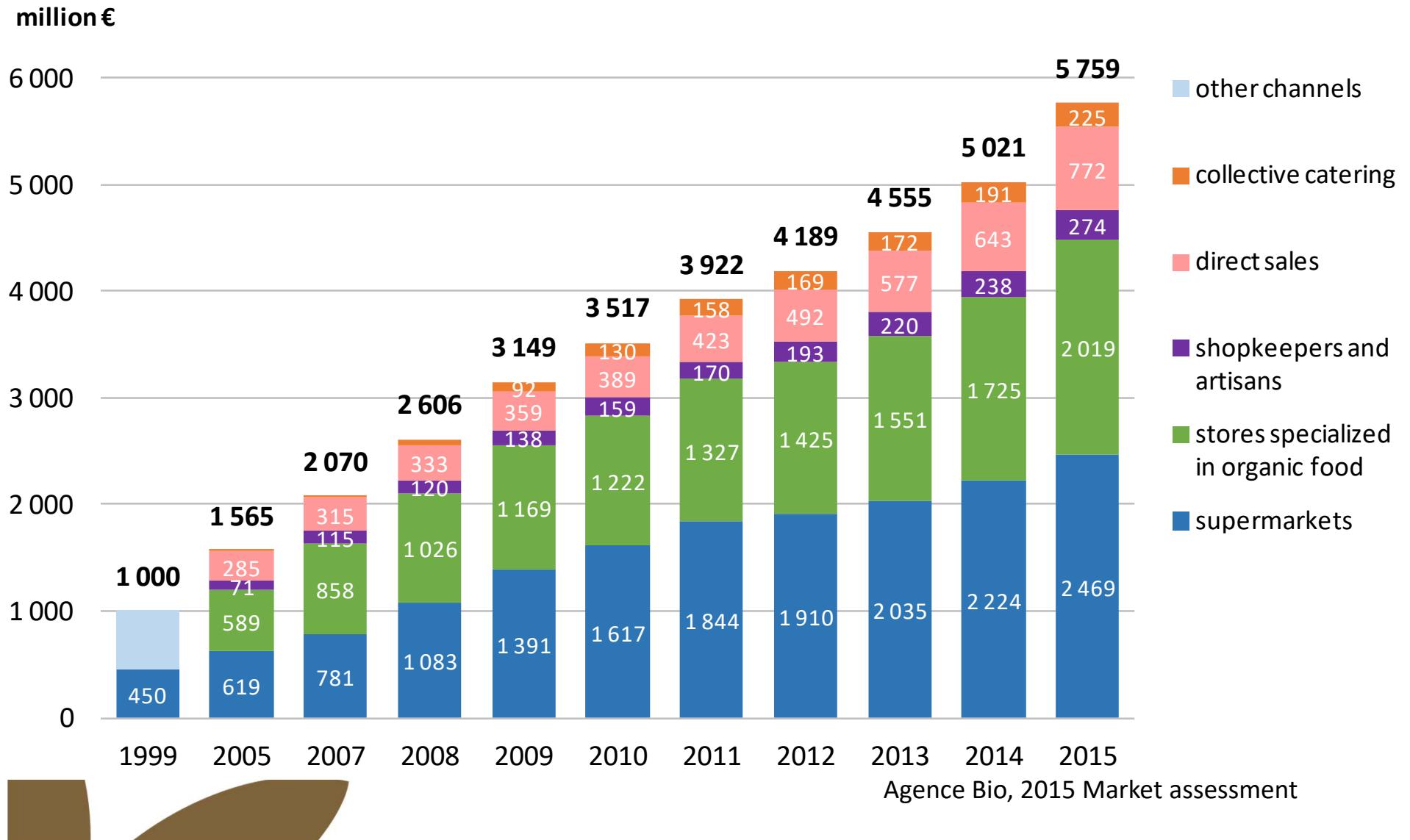
→ **Facilitates dialog and favours synergies**

- Platform for sharing and pooling resources and for dialog between organic stakeholders
- Inform and promote (communication, organic operators directory)
- Structuring and strengthening the sector (Avenir Bio fund)
- Economic and Statistical observatory



French organic food market in 2015

Sales of organic food from 1999 to 2015 in France by category of distribution channel



Household consumption of organic food

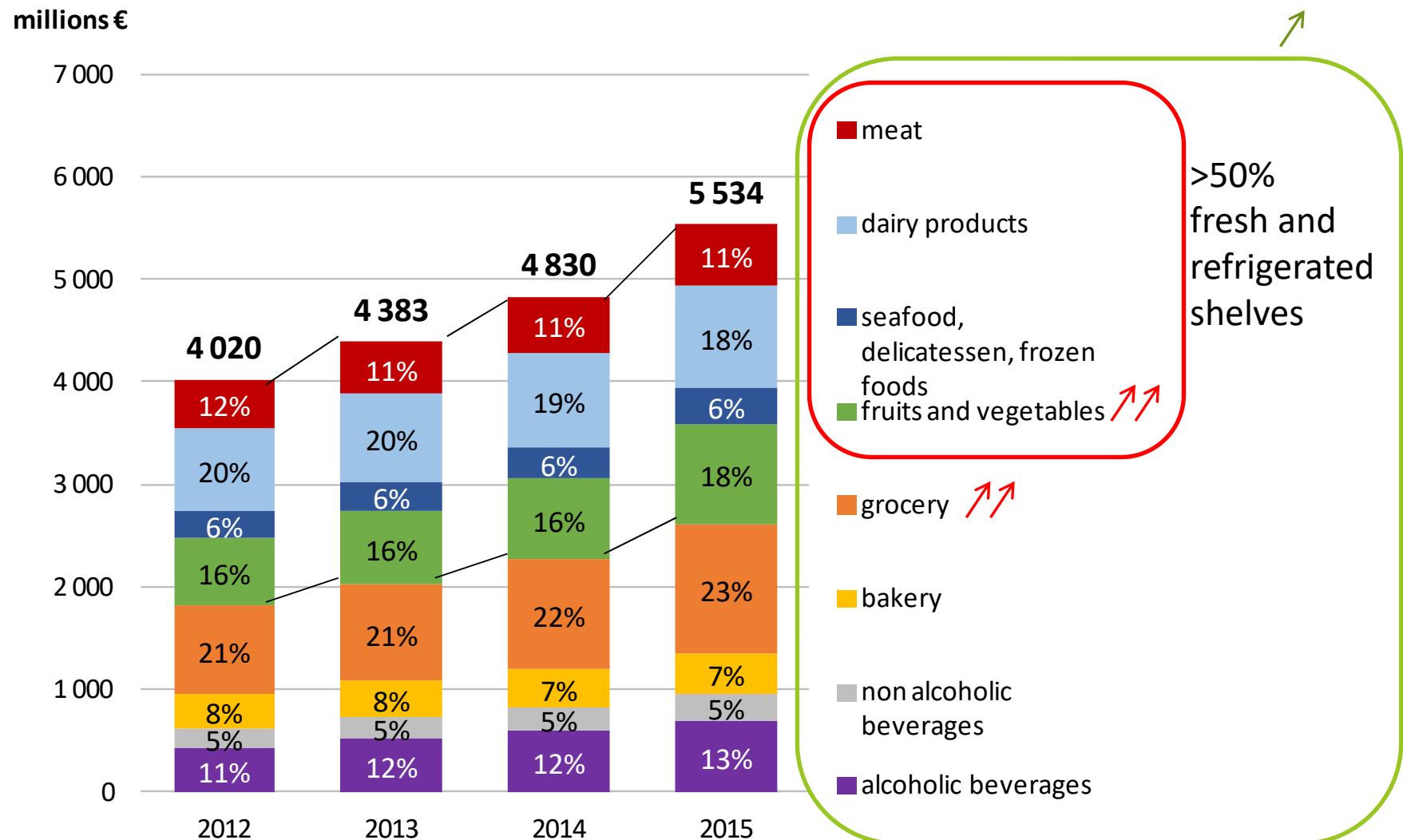
| million € | Annual turnover including taxes | | | | | | | growth between 2014 and 2015 | organic market share |
|--|---------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|------------------------------|----------------------|
| | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | | |
| supermarkets | 1 391 | 1 617 | 1 844 | 1 910 | 2 035 | 2 224 | 2 469 | 11,0% | 44,6% |
| network stores sp. in organic food | 805 | 855 | 950 | 1 078 | 1 212 | 1 365 | 1 624 | 19,0% | 29,3% |
| independent stores sp. in organic food | 364 | 367 | 377 | 347 | 339 | 361 | 395 | 9,6% | 7,1% |
| all stores specialized in organic food | 1 168 | 1 222 | 1 326 | 1 425 | 1 551 | 1 725 | 2 019 | 17,0% | 36,5% |
| shopkeepers and artisans | 138 | 159 | 170 | 193 | 220 | 238 | 274 | 15,1% | 4,9% |
| direct sales | 359 | 389 | 423 | 492 | 577 | 643 | 772 | 20,1% | 14,0% |
| TOTAL | 3 056 | 3 387 | 3 764 | 4 020 | 4 383 | 4 830 | 5 534 | 14,6% | 100% |
| Market share of organic | 1,9% | 1,8% | 2,0% | 2,1% | 2,3% | 2,5% | 2,9% | | |

* Monthly series CVS CJO at the price of the previous year (agricultural products including tobacco)

Agence Bio, 2015 Market assessment

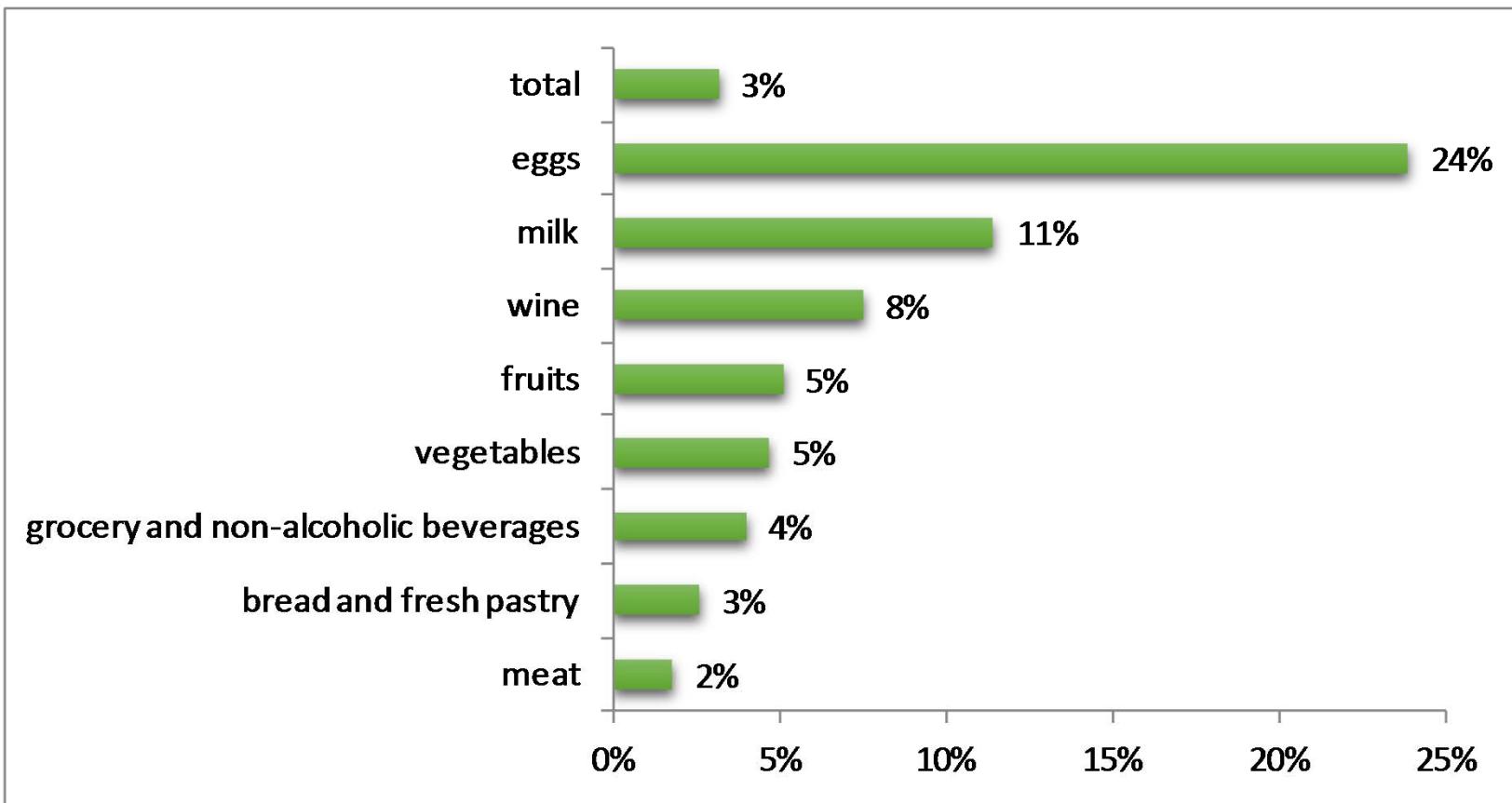


Product shares in the organic food market



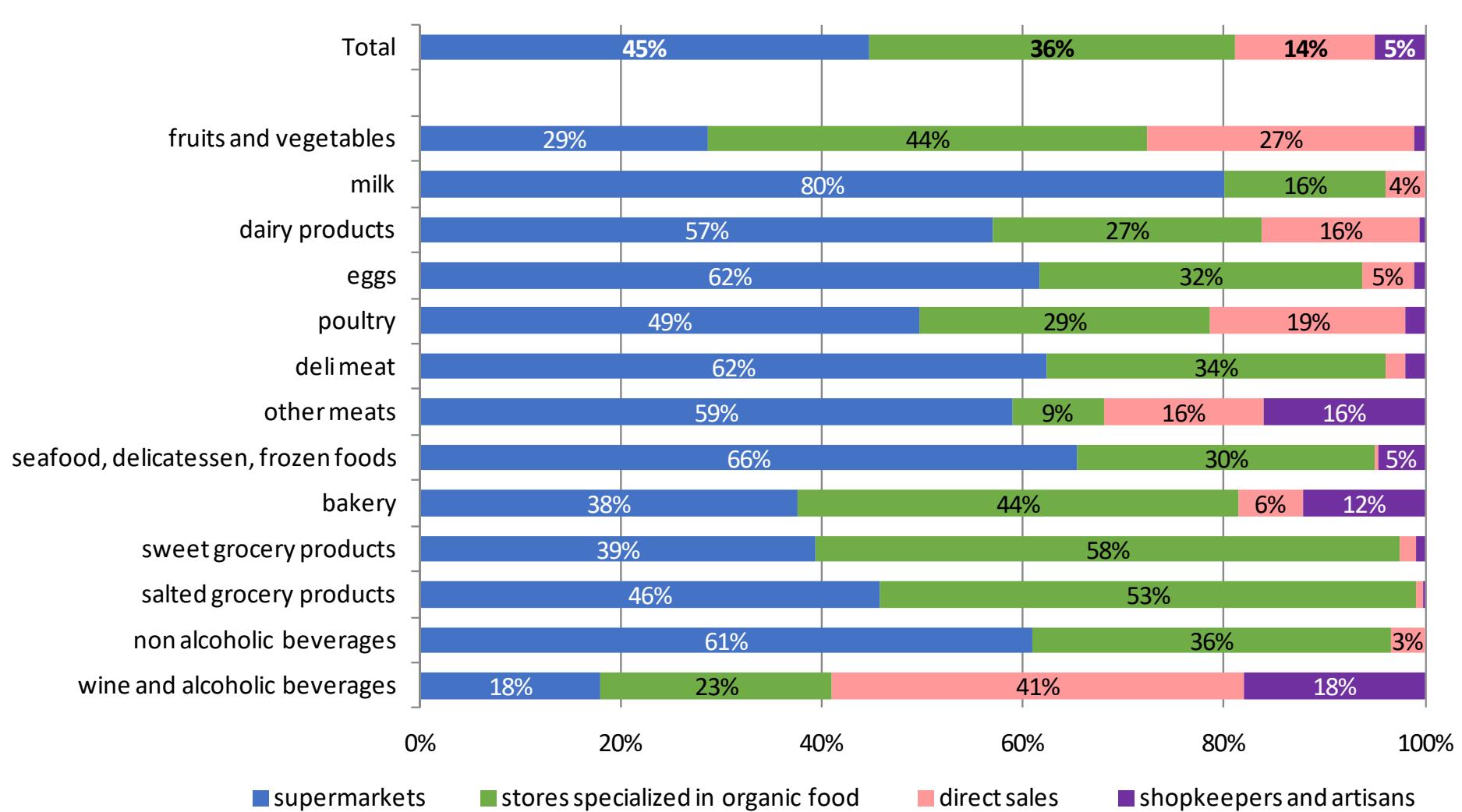
Agence Bio, 2015 Market assessment

Market share of organic products in general consumption

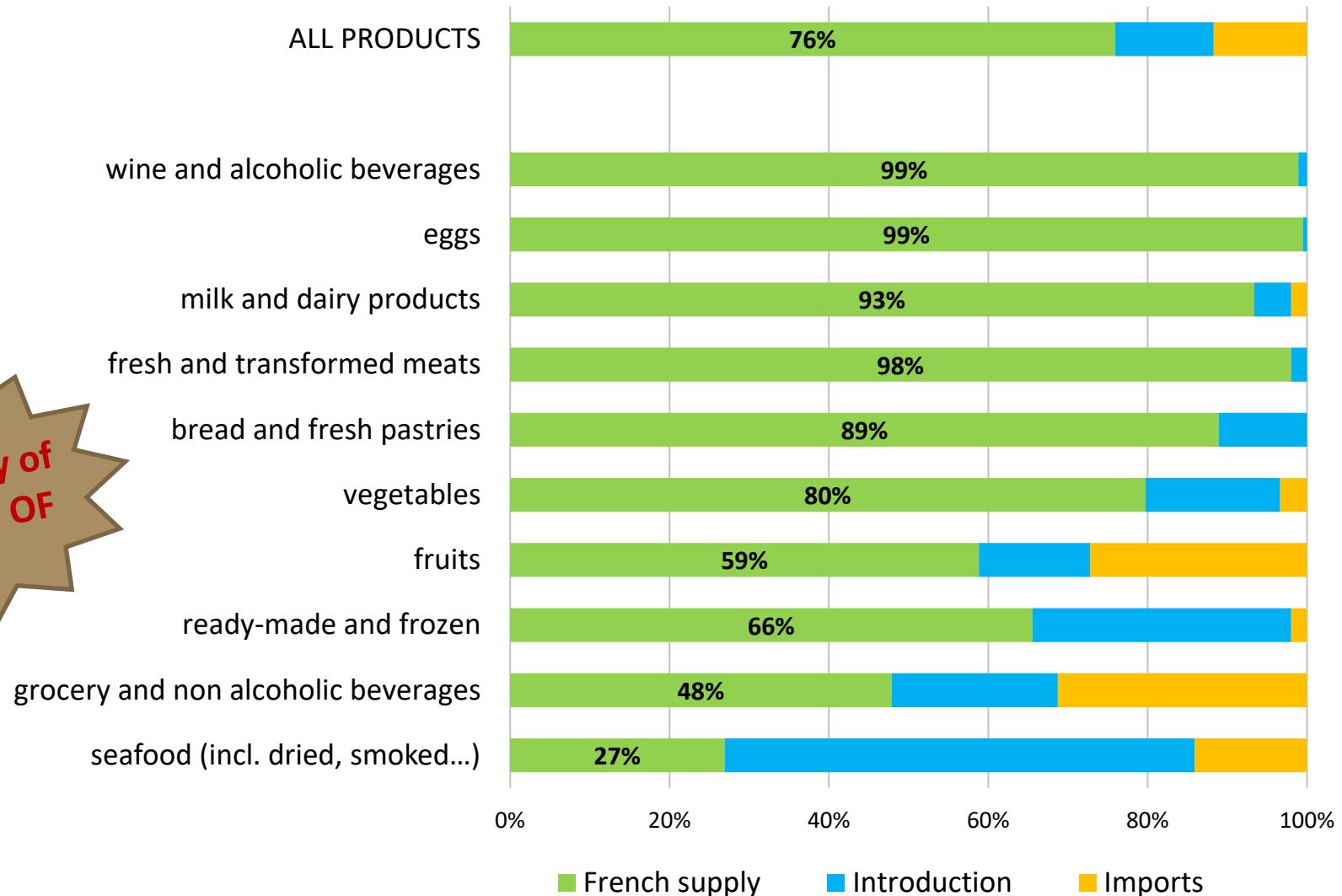


Agence Bio, 2015 Market assessment

Market shares of distribution channels for different organic products



Origin of organic food consumed in France



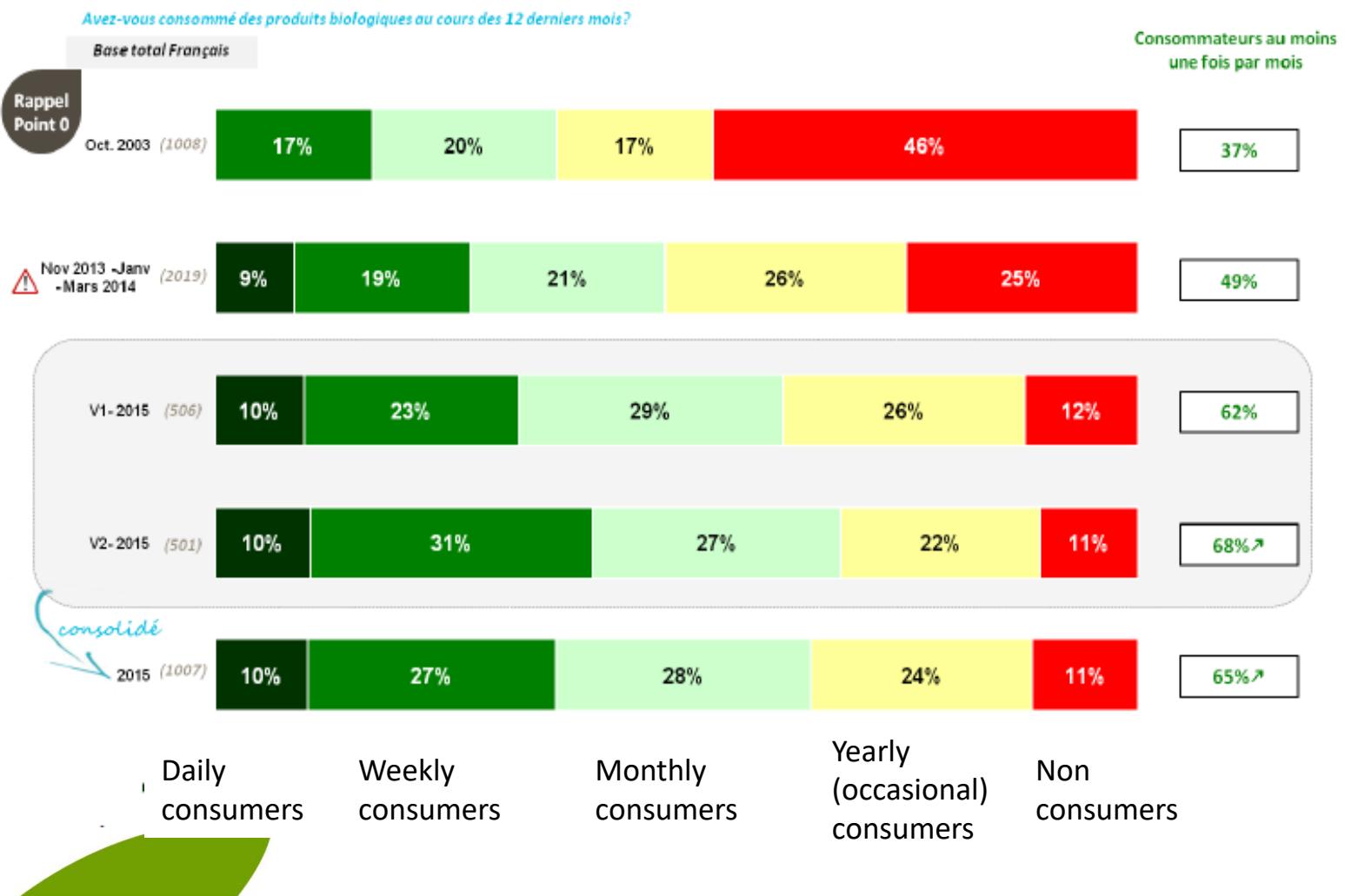
Agence Bio, 2015 Market assessment

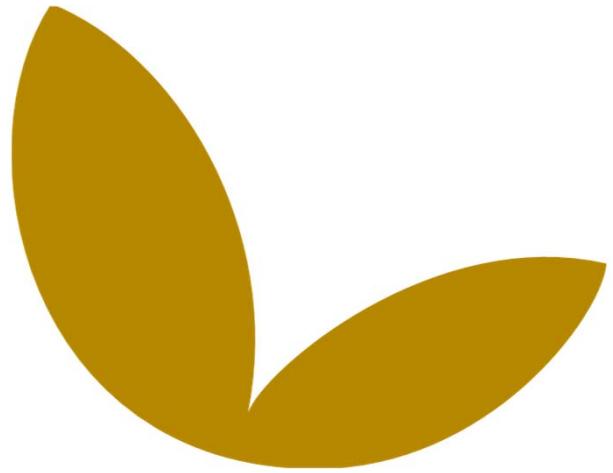
Prospects for 2016

- Approx. 7 billion Euros
- +20 % at least vs 2015
- Most dynamic sectors:
 - Fruits and vegetables
 - Grocery
 - Self-service fresh products
 - Direct sales
 - Stores specialised in organic products



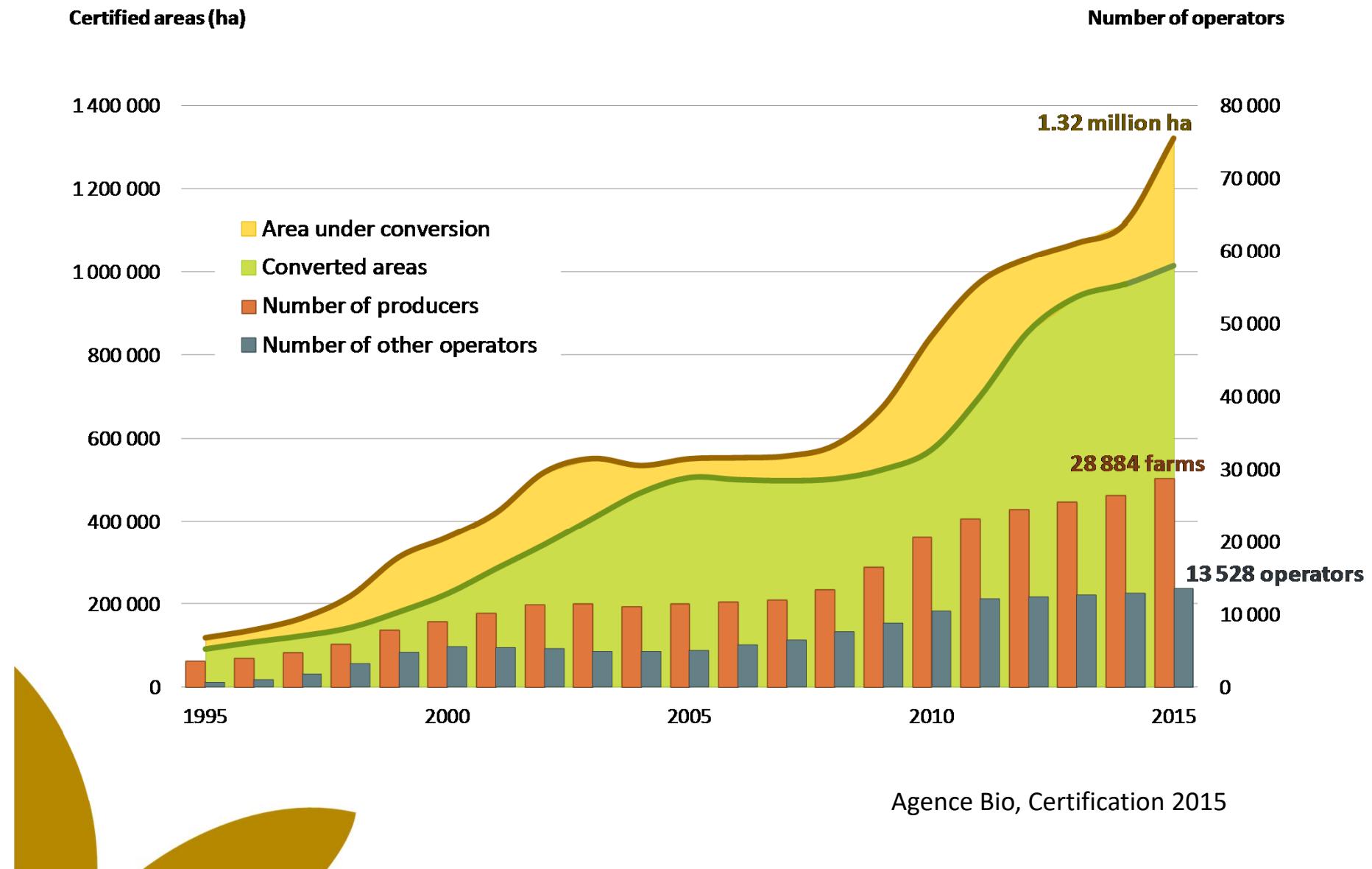
Some facts and figures on French consumers



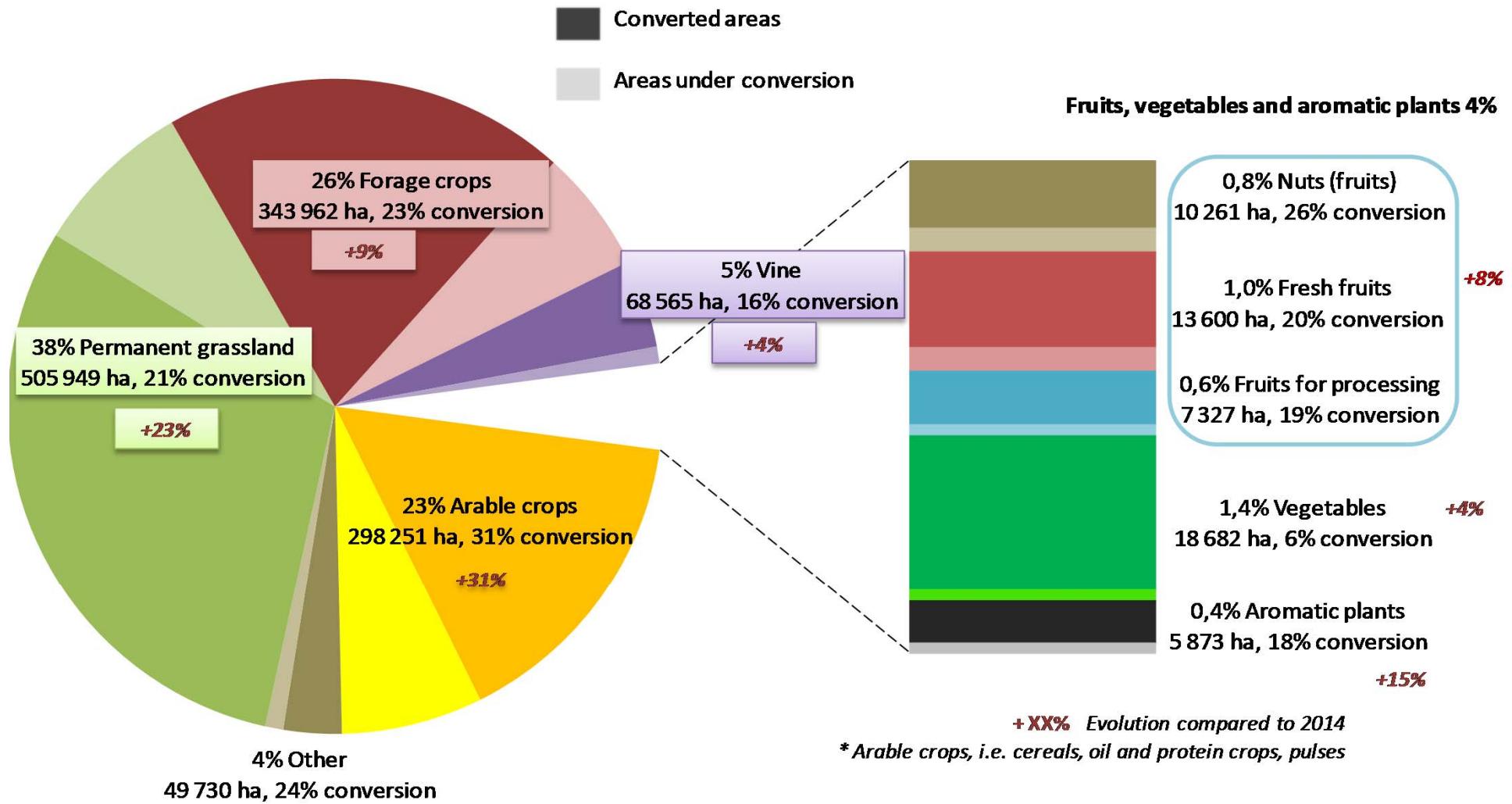


French organic production

Evolution of organic production in France



French organic land use



2016 tendencies

Au 30 juin 2016 et évolution par rapport à fin 2015

Acteurs de la Bio

31 880 fermes



+10 %

7,2% des fermes françaises

10 % des emplois agricoles

14 338



+6 %

transformateurs
distributeurs, importateurs
et exportateurs

46 218 opérateurs



+9 %

(18 380 en 2007)

Surfaces Bio*

1,57 million d'hectares



+20 %

Plus d'1 million ha certifiés bio
(500 000 ha en 2007)

+6 %

260 000 ha
en première année de conversion

+40 %

Plus de 5,8 % du territoire agricole
(2 % fin 2007)

*Premières estimations

For more information visit

www.agencebio.org

The screenshot shows the homepage of the Agence BIO website. The header features the Agence BIO logo with two green leaves above the word 'BIO'. Below it is the text 'Agence Française pour le Développement et la Promotion de l'Agriculture Biologique'. To the right are logos for AB Agriculture Biologique and the European Union. A navigation bar at the top includes links for 'LA BIO & ses acteurs', 'CONSOMMER BIO & s'informer', 'ESPACE PRO & outils', 'CHIFFRES CLÉS & analyses', 'COMMUNICATION actions & outils', and a search bar. The main content area has a background image of carrots. A banner at the top of this area reads 'La Bio des 4 Saisons : vous aussi participez!' followed by a description of events. Below this are sections for 'Actualités' (with a dropdown arrow) and 'Agenda'. The 'Actualités' section lists news items like 'Plus d'emplois dans les exploitations viticoles bio' and '5e édition du concours les Petits Reporters : vous aussi participez !'. The 'Agenda' section lists events such as '15 au 18 février 2017 - Nuremberg, Allemagne' and 'Salon Biofach'. On the right side, there's a sidebar with links for 'L'AGENCE BIO', 'ACTUALITÉS', 'AGENDA', 'PARTENAIRES', 'L'ANNUAIRE officiel' (with a logo), 'NOTIFICATION', 'Votre espace PERSONNEL' (with a padlock icon), and a 'Selectionner une langue' dropdown menu. A black arrow points to this language selection dropdown. In the bottom right corner of the page, the word 'Translate' is visible.

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et la Promotion de l'Agriculture Biologique

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L'AGENCE BIO

ACTUALITÉS

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L'ANNUAIRE officiel

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Selectionner une langue

Translate

Meet with us @



BioFach, on Business France's stand

Hall 1, booth 1-221A



International Seminar on organic farming during the International Agricultural Show in Paris on Feb. 28th
<http://www.agencebio.org/seminaire-international>

- Overview on the organic sector in Europe
- Development factors and obstacles
- Understanding the consumer in Europe
- Communication strategies



www.agencebio.org