MINISTÈRE
DE L'AGRICULTURE
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Liberté
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AN OVERVIEW OF FRANCE'S AGRIFOOD INDUSTRIES

Key statistics and indicators

2021 EDITION

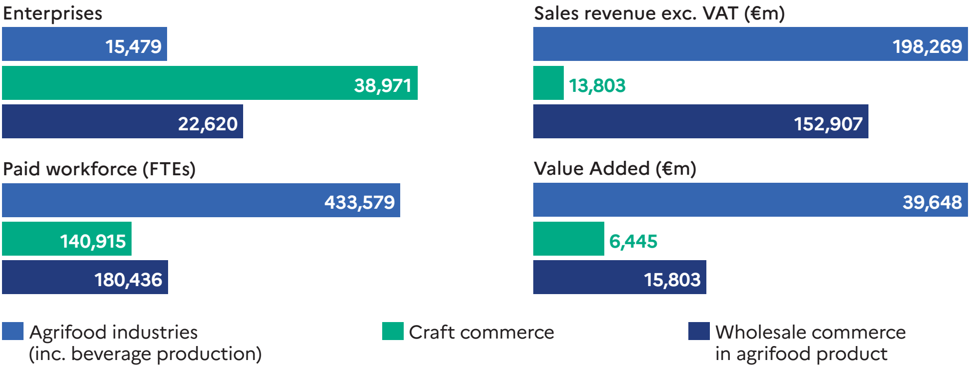
CONTENTS

BACKGROUND

In 2018, France's **agrifood industries** employed **433,579 full time equivalent personnel** in **15,479 companies**. Those companies generated sales revenue of **€198 billion**.

KEY STATISTICS FOR AGRIFOOD ENTERPRISES IN 2018

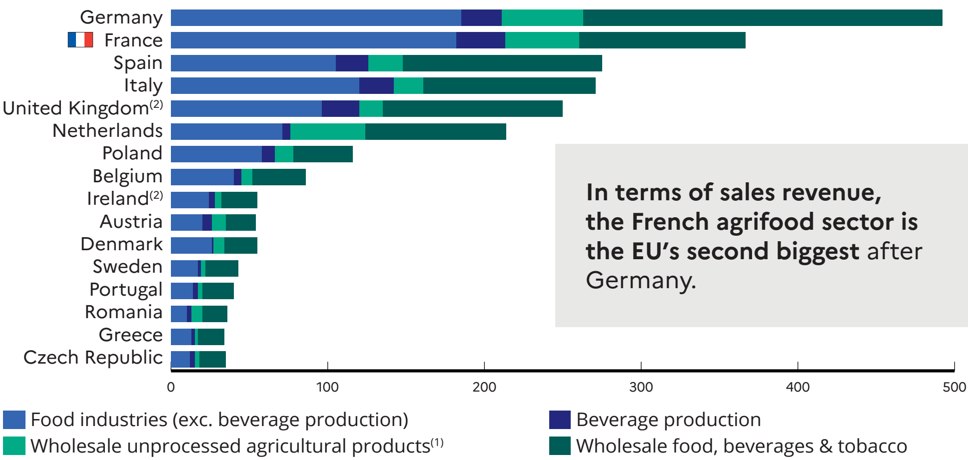
Source: INSEE - ESANE, SSP analysis



Scope: Agrifood industries, craft commerce and agrifood wholesale commerce, inc. French overseas territories.

EU MEMBER STATES' NET SALES EXC. VAT IN 2018 (€bn)

Source : Eurostat, traitements SSP



In terms of sales revenue, the French agrifood sector is the EU's second biggest after Germany.

(1) Including live animals
(2) (2)Statistics for beverage production have been unavailable for Ireland since 2014 and for the United Kingdom since 2012. The development trend for the food industries has been applied to arrive at an estimate for the sector's 2018 sales revenue.
NB: The 16 countries shown in the graphic account for 96% of total sales of EU28 agrifood enterprises.

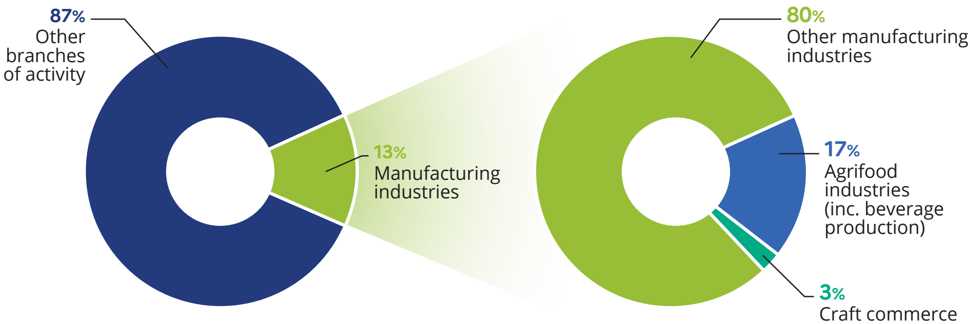
Scope: all agrifood industries, including craft commerce and agrifood wholesale.

SHARE OF MANUFACTURING INDUSTRIES IN FRANCE'S GROSS DOMESTIC PRODUCT IN 2019

Source: INSEE, National Accounts - baseline 2014

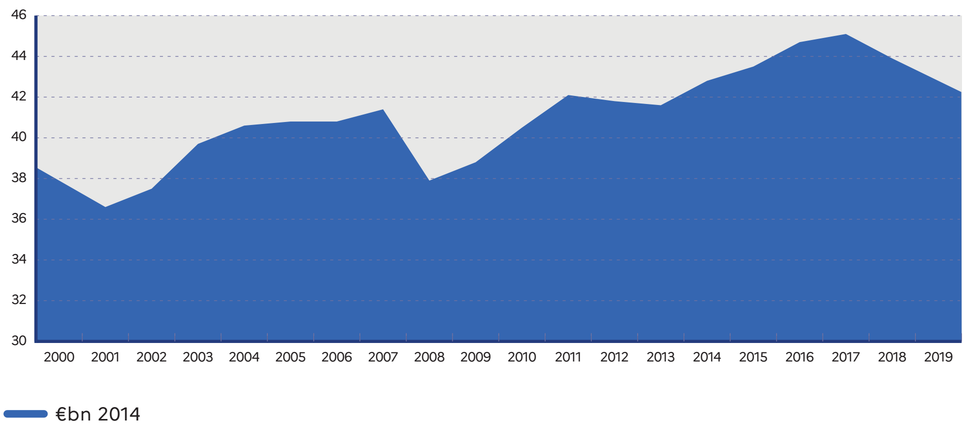
SHARE OF AGRIFOOD INDUSTRIES (VALUE-ADDED) IN ALL MANUFACTURING IN 2018

Source: INSEE - ESANE



AGRIFOOD SECTOR VALUE-ADDED[1]

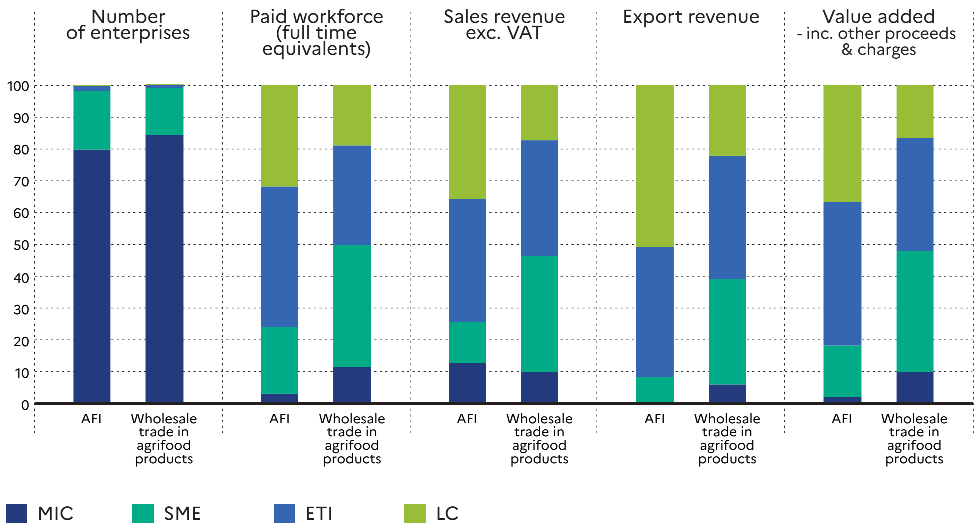
Source: INSEE, National Accounts - baseline 2014



(1) Scope: the food, beverages and tobacco-based product manufacturing sector covers all homogeneous production units for the relevant products.

BREAKDOWN OF KEY STATISTICS BY SIZE OF AGRIFOOD ENTERPRISE IN 2018 (%)

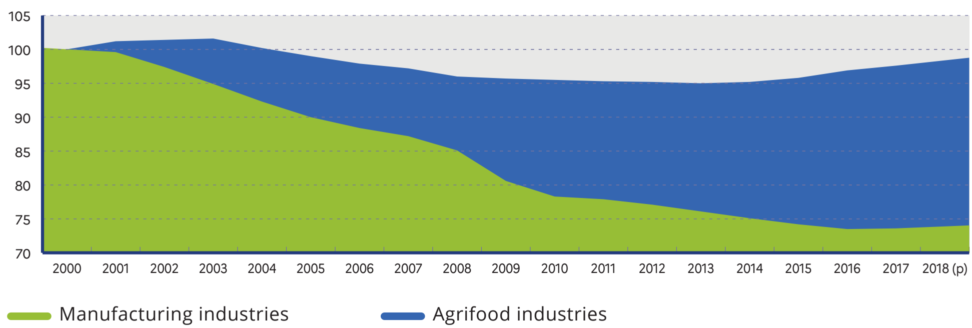
Source: INSEE - ESANE 2015, SSP analysis



Scope: agrifood enterprises (including beverage production), France.
Micro-enterprises (MIC) have fewer than 10 employees and annual sales or a balance sheet total of less than €2m.
Small and medium-sized enterprises (SME) have 10-249 employees and annual sales of less than €50m or a balance sheet total of less than €43m.
Intermediate-size enterprises (ETI) have 250-5,000 employees and annual sales of less than €1.5bn or a balance sheet total of less than €2bn.
Large corporations (LC) account for the remaining enterprises.

LEVELS OF AGRIFOOD AND MANUFACTURING EMPLOYMENT SINCE 2000

(baseline 100 year 2000)
Source: INSEE – Localised employment estimates (ESTEL)



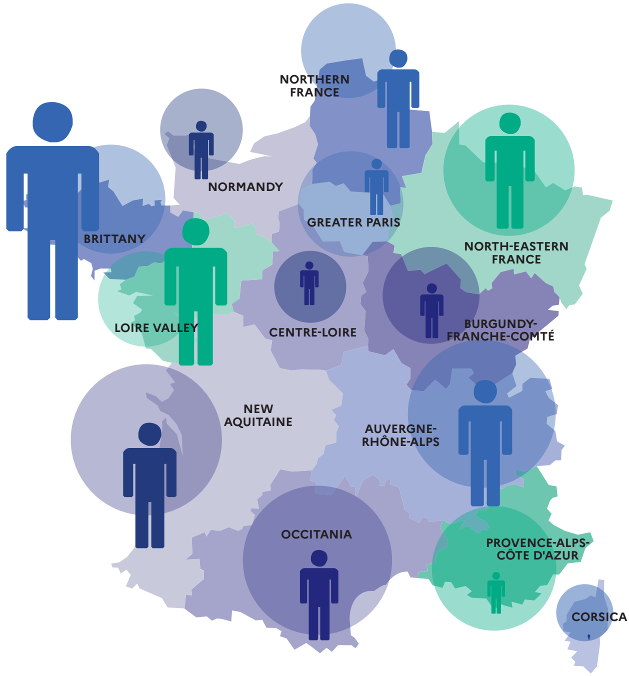
Scope: Metropolitan France, raw data, including craft commerce. The source data do not permit craft commerce to be singled out from agrifood as a whole (including beverage production).
(p) provisional estimates.

REGIONAL BREAKDOWN OF AGRIFOOD INDUSTRY AND RELATED EMPLOYMENT

Source: Source: ESANE 2017, Florès 2017, SIRUS, INSEE, SSP analysis

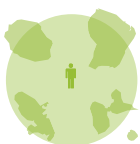
Paid workforce in FTEs

Number of legal units



Region	Number of legal units	Paid workforce in FTEs
BRITTANY	1,127	49,636
LOIRE VALLEY	865	33,884
AUVERGNE-RHÔNE-ALPS	2,075	28,989
NEW AQUITAINE	2,169	28,867
NORTH-EASTERN FRANCE	1,635	26,702
NORTHERN FRANCE	853	22,710
OCCITANIA	2,111	20,774
NORMANDY	648	13,438
GREATER PARIS	1,058	12,918
BURGUNDY-FRANCHE-COMTÉ	891	12,556
PROVENCE-ALPS-CÔTE D'AZUR	1,472	9,552
CENTRE/LOIRE	492	7,912
CORSICA	309	1,032
REUNION ISLAND	345	3,936
GUADELOUPE	335	1,758
MARTINIQUE	176	1,443
FRENCH GUIANA	84	328
MAYOTTE	NC	NC

FRENCH OVERSEAS TERRITORIES



Scope: Agrifood industry including beverage production, excluding craft commerce, France.

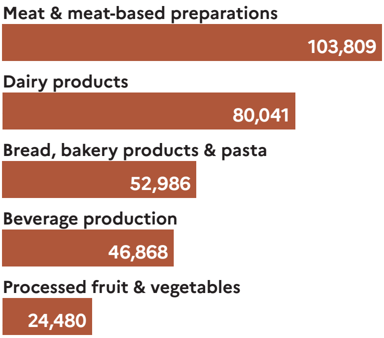
Note: Regionalised figures have been calculated on the basis of the 2017 statistics as supplemented by SIRUS data. The figures shown are provisional.
A single enterprise may be located in more than one region. The data shown are based on single-region or quasi-single-region legal units.
Single-region enterprise: all employees (or, failing this, all establishments) are located in the region.
Quasi-single-region enterprise: more than 80% of employees (or, failing this, of establishments) are located in the region.
Reunion Island and Guadeloupe: the workforce figures shown are those for single-region enterprises; the data for quasi-single-region enterprises are covered by statistical confidentiality.

AGRIFOOD ECONOMIC PERFORMANCE: INTER-SECTOR DISPARITIES

DATA FOR THE FIVE BIGGEST AGRIFOOD SECTORS IN FRANCE IN 2018

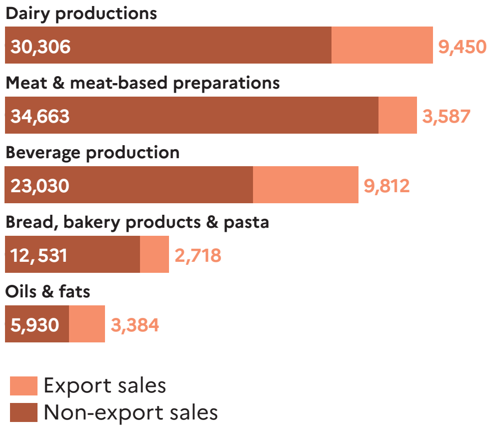
Source: INSEE - ESANE, SSP analysis

Paid workforce in FTEs



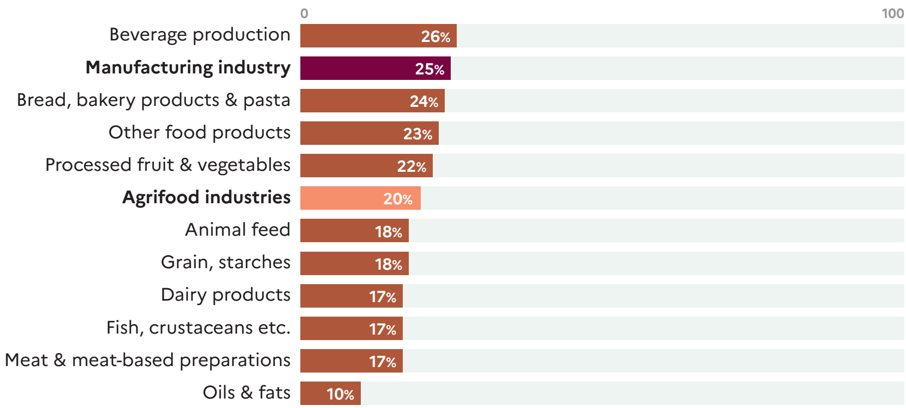
Scope: agrifood enterprises, excluding craft commerce and tobacco, France, including overseas territories.

Net annual sales per sector inc. exports (€m)



LEVELS OF VALUE-ADDED IN 2018

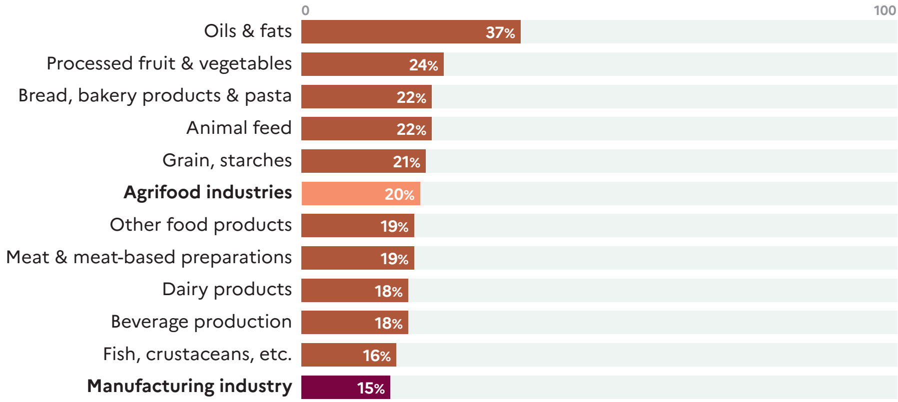
(value-added, including other proceeds and charges/net annual sales)
Source: INSEE - ESANE, SSP analysis



Scope: agrifood industry, excluding craft commerce and manufacturing industry, France.

LEVELS OF INVESTMENT IN 2018

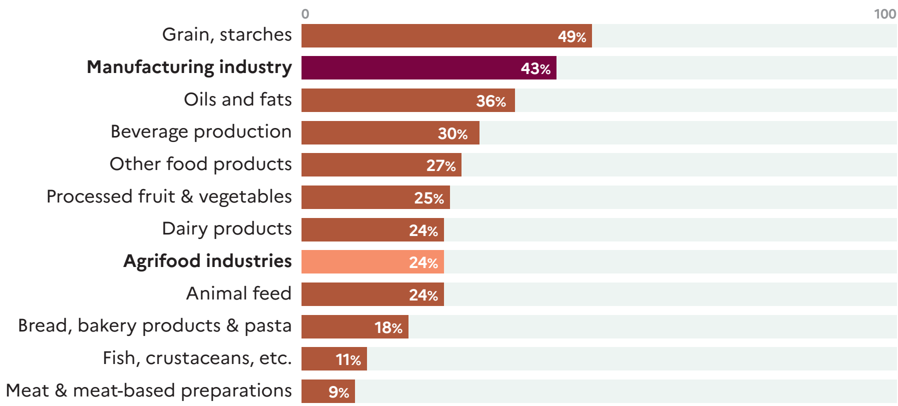
(investment/value-added)
Source: INSEE - ESANE, SSP analysis



Scope: agrifood industry excluding craft commerce and manufacturing industry, France.

LEVELS OF EXPORTS BY SECTOR IN 2018

(export sales/total sales)
Source: INSEE - ESANE, SSP analysis



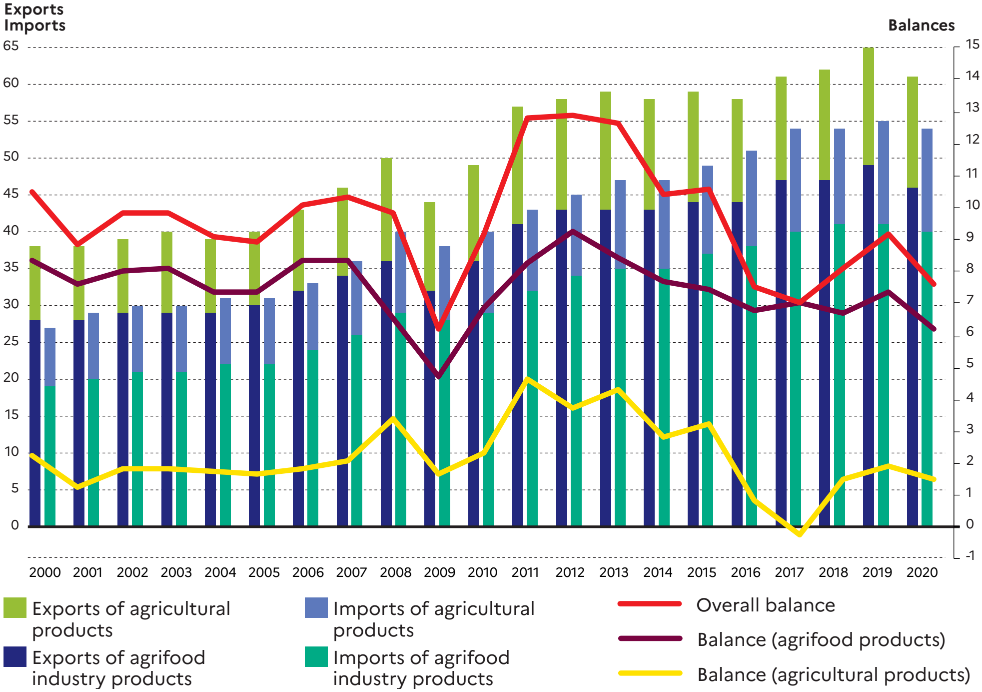
Scope: agrifood industry excluding craft commerce and manufacturing industry, France.

INTERNATIONAL TRADE

LEVELS OF IMPORTS/EXPORTS AND AGRIFOOD TRADE BALANCES, INCLUDING BEVERAGE PRODUCTION BUT EXCLUDING TOBACCO

(€bn)

Source: Customs



TRADE BALANCES IN DETAIL (€bn)

Source: Customs

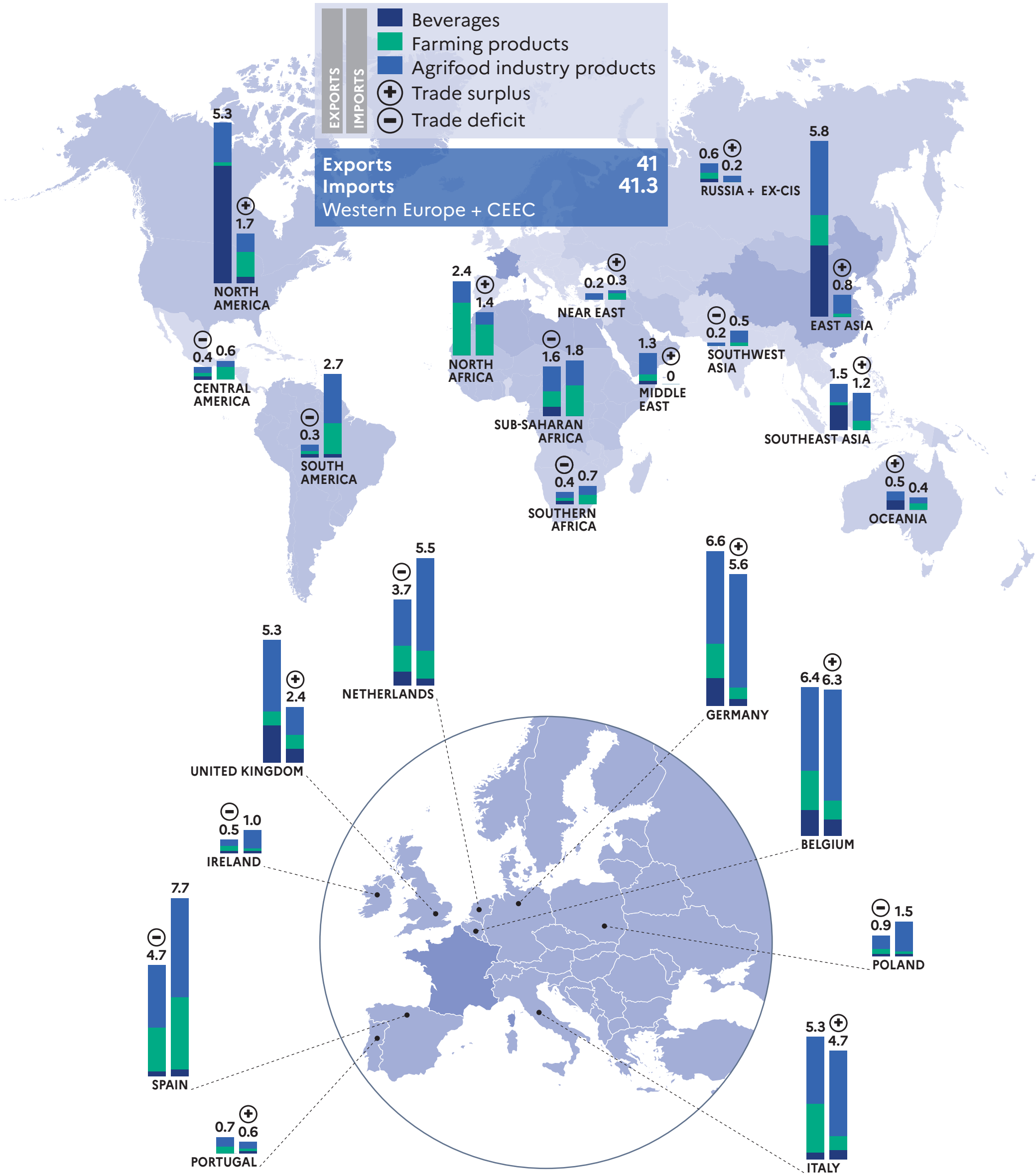
NB: trade balance = exports – imports

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total agrifood industries	8	6	5	7	8	9	8	8	7	7	7	7	7	6
Total unprocessed farm products	2	3	2	2	5	4	4	3	3	1	0	1	2	1
Total agrifood industry exc. beverages	-1	-2	-3	-2	-1	-2	-2	-3	-4	-5	-5	-6	-6	-5

Champ : IAA y compris artisanat commercial, agriculture et pêche, France

FRENCH EXPORTS AND IMPORTS OF FARMING AND AGRIFOOD PRODUCTS WORLDWIDE IN 2020 (€bn)

Source: Customs, SSP analysis



Scope: farming and agrifood products, France.

QUALITY SCHEMES IN THE AGRIFOOD INDUSTRIES

A RANGE OF QUALITY AND ORIGIN LABELLING SCHEMES

Source: INAO, 2019 data

Label rouge
434 approved mandatory specification sets

AOC/AOP
101 designated products (exc. wines & spirits), 363 wines and 17 spirits

STG
1 speciality

IGP
143 indications (exc. wines and spirits) and 74 wines

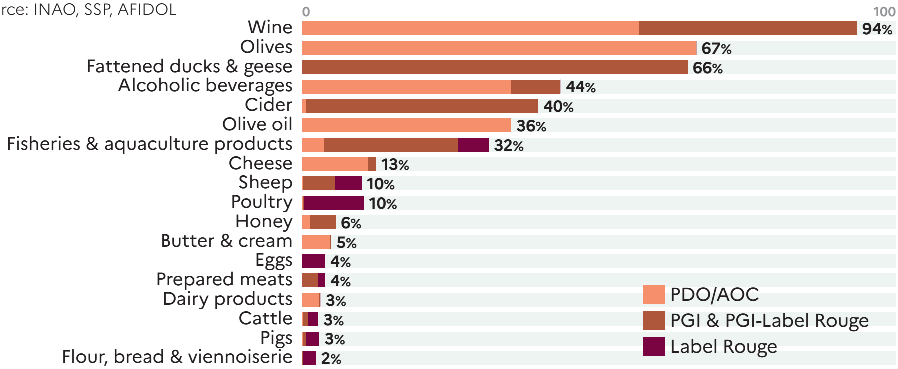
IG boissons spiritueuses

IG
35 alcoholic beverages (exc. AOC/PDO alcoholic beverages, these being also covered by geographical indications at EU level)

AB - Organic Farming
8.5% of utilised agricultural area

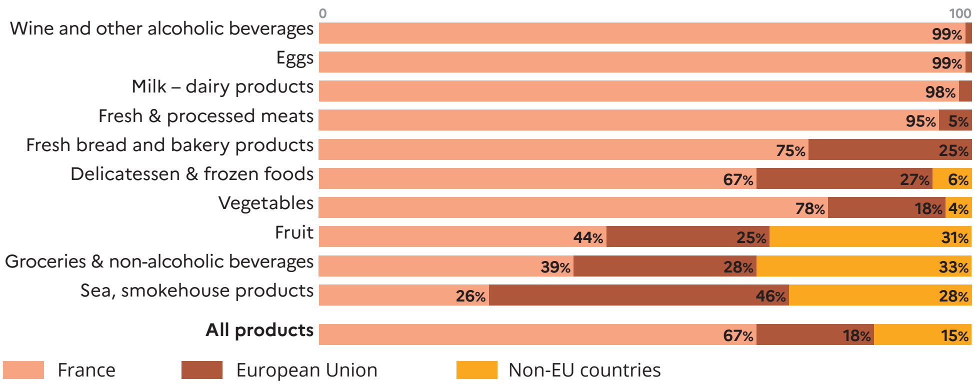
VOLUME SHARE OF QUALITY LABEL PRODUCTS (EXC. ORGANIC) IN THEIR NATIONAL SECTORS IN 2019

Source: INAO, SSP, AFIDOL



PROCUREMENT ORIGINS BY ORGANIC PRODUCT IN 2019 (%)

Source: Agence Bio/AND-International 2020



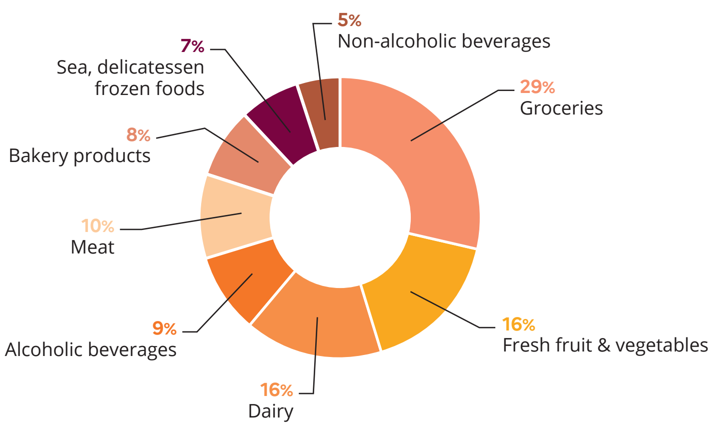
Sales of organic farming products in France grew by just under 13.5% from 2018 to 2019, representing total sales of **€12 billion** in 2019, of which **€640m** related to procurement by the out-of-home catering sector (+16.5%). In 2019, there were over **63,510 direct jobs** in organic sector processing and distribution.

ORGANIC SALES, AND SALES GENERATED BY OTHER QUALITY-LABELLED PRODUCTS IN 2019 – CHANGE FROM 2018 (€ millions)

Source: INAO and Agence Bio

BREAKDOWN BY VALUE OF HOUSEHOLD ORGANIC FARMING PURCHASES IN 2019

Source: Agence Bio/AND-International

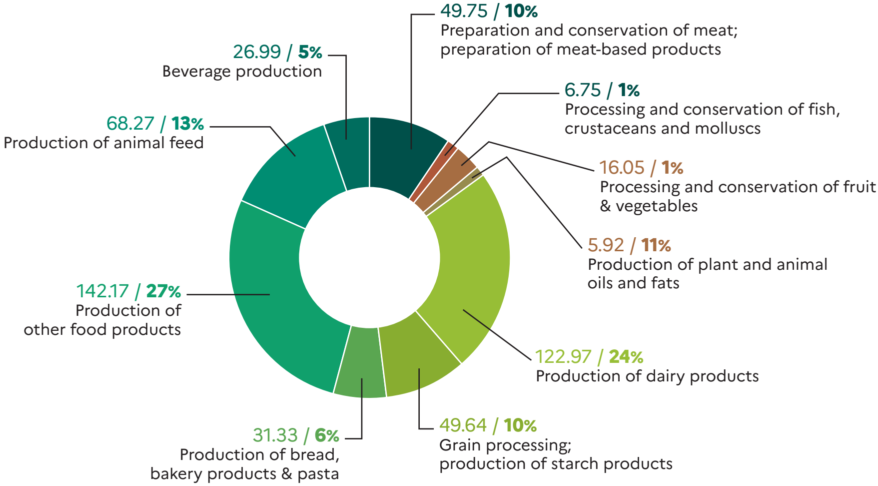


INNOVATION: A KEY FACTOR FOR COMPETITIVENESS

LEVELS OF R&D SPENDING BY AGRIFOOD SECTOR IN 2017

(€ millions & percentage)

Source: Ministry of Higher Education, Research & Innovation (MESRI), DGPE analysis

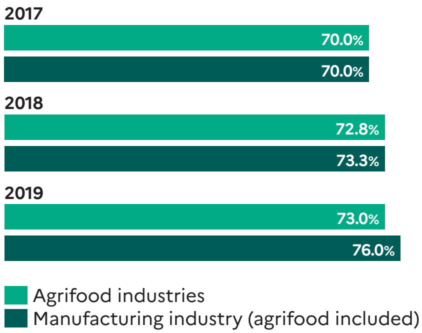


NB: Only enterprises with a national agrifood sector code (NAF) (10-11) are shown in this graphic. Certain agrifood enterprises (large corporate groups in particular) have a NAF code that is not in these categories and their spending has not therefore been included in the above data. This may be a source of non-negligible bias.

PENETRATION OF E-COMMERCE INTO THE AGRIFOOD SECTOR

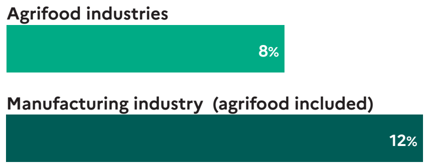
Rising percentages of enterprises with a website

Source: INSEE – ICT, SSP analysis



Percentage of revenue from Internet sales in 2018

Source: INSEE – ICT 2019, SSP analysis



DEFINITIONS

Enterprise: the smallest combination of legal units forming an organisational unit for the production of goods and services enjoying a degree of decisional autonomy, most notably for the allocation of its current resources.

Establishment: a production unit that is geographically individualised but nevertheless dependent on the enterprise. It is identified by its 14-digit SIRET registration number.

FTE: Full Time Equivalent = the total number of hours worked/annual average of hours worked in full time positions in the economy of the geographical area.

Gross Value-Added (VA) or Value-Added exc. VAT: production value – intermediate consumption (goods and services either processed or entirely consumed in the course of the production process).

Value Added at Factor Cost (VAFC): Gross VA – tax on production + operating subsidies.

Value Added Tax rate: VA/net sales.

ESANE margin rate: Gross Operating Surplus (VAFC – wages – tax + subsidies)/VAFC.

National Account Margin Rate: Gross Operating Surplus/Gross VA.

Investment Rate: investissements corporels brut hors apports / VACF.

Export Rate: percentage of net sales generated by exports.

Data scope: the agrifood industries fall into divisions 10 and 11 in the official French NAF Rev 2 activity listing, with the exception of the craft commerce segment (NAF rev2. sub-classes 1013B, 1071B, C and D).

The "tobacco-based fabrication" sector has been excluded.

It is worth noting that the concept of craft commerce does not totally overlay the concept of craft food production for which enterprises may be classified in the sub-classes of division 10 and 11, which do not relate exclusively to craft-type activities (e.g. production of ice creams and sorbets), or in sub-classes of division 47 (retail outlets) which may relate to processing activities (e.g. butcher's, tripe shops). Craft businesses are defined by French official decree no. 98-247 of 2 April 1998 concerning craft qualifications and the trades register.

PRODUCTION

Farming & fisheries

PROCESSING

Food industry
Div. 10 NAF Rév 2

Beverages
Div. 11

}**Agrifood Industry**

Tobacco
Div. 12

Unless otherwise indicated, the agrifood industry sector does not include craft commerce

COMMERCIALISATION

Wholesale commerce
462 : unprocessed farm products and livestock
463 : food products and beverages

Craft commerce
10.13B : meat-based preparations
10.71B, C et D : C & D: baking and manufacture of bakery and pastry products

Retail commerce (inc. supermarkets)

Out-of-home catering

CONTACTS
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