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AN OVERVIEW OF THE FRENCH AGRI-FOOD INDUSTRIES

Key figures and indicators



2022 EDITION

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DEFINITIONS

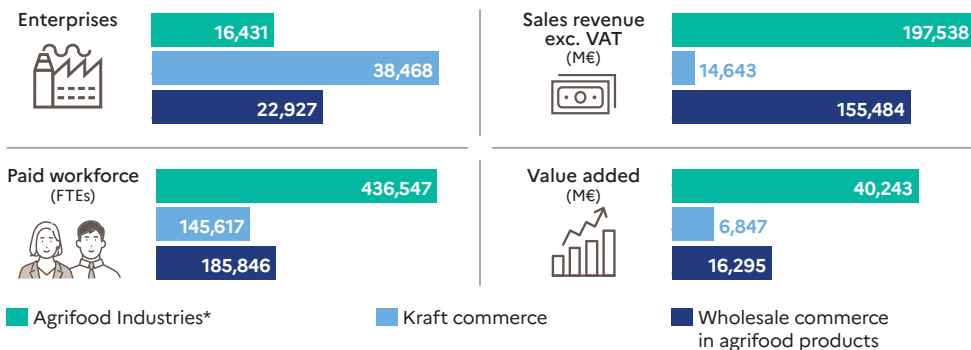


BACKGROUND

On December 31, 2019, the French agri-food industries (AFIs) employed **436,547 full-time equivalent employees** in **16,431 companies** (legal units). These companies generated sales of **€197.5 billion**.

KEY FIGURES FOR AGRI-FOOD ENTERPRISES IN 2019

Source: Insee - Esane, SSP analysis

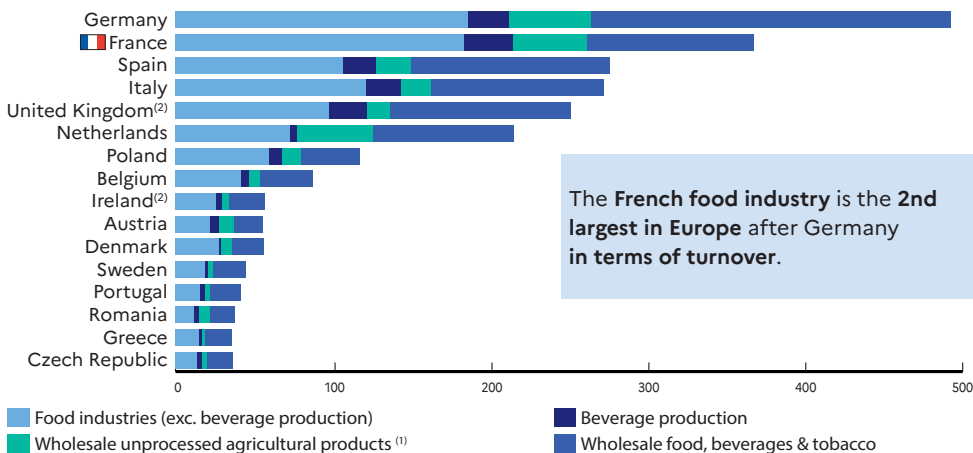


* (inc. Beverage production)

Scope: Agrifood industries, artisanal food production and agrifood wholesale business, Inc. French overseas territories.

REVENUE (EXCLUDING TAX) OF THE COUNTRIES OF THE EUROPEAN UNION IN 2018 (in billions of euros)

Source: Eurostat, SSP analysis

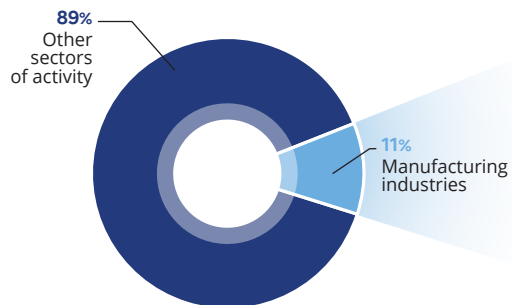


(1) Including live animals.

(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 artisanal food production and agrifood wholesale.

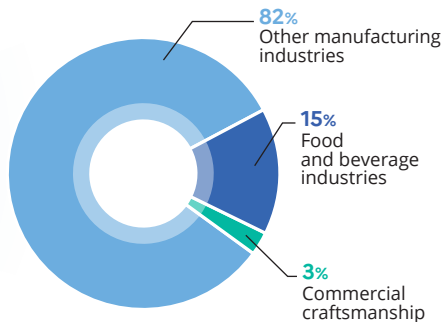
WEIGHT OF MANUFACTURING INDUSTRIES IN THE FRENCH GROSS DOMESTIC PRODUCT IN 2020

Source: Insee, National Accounts - 2014 base



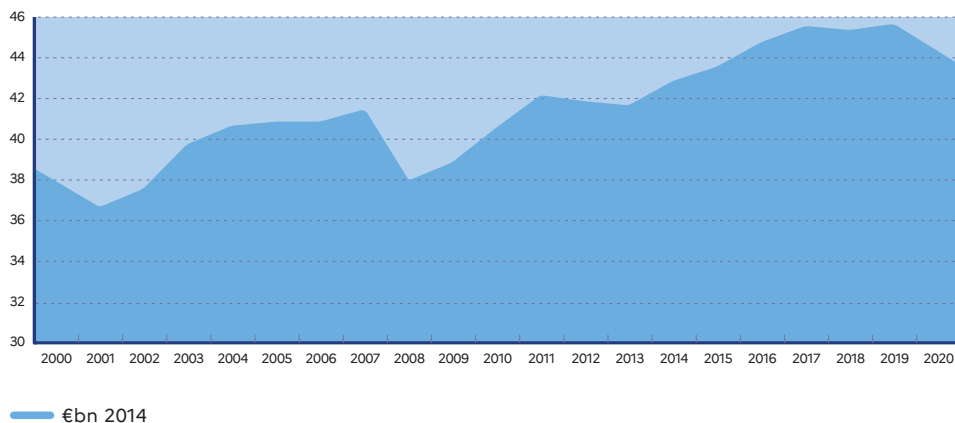
WEIGHT OF THE FOOD INDUSTRY (ADDED VALUE) IN THE FRENCH MANUFACTURING INDUSTRY IN 2019

Source: Insee - Esane



GROSS ADDED VALUE OF THE AGRI-FOOD INDUSTRY⁽¹⁾

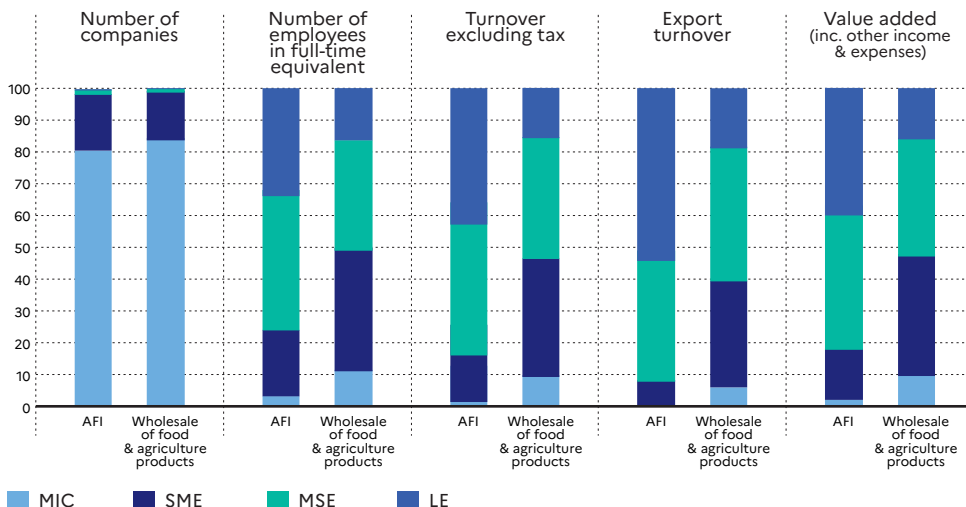
Source: Insee, National Accounts - 2014 base



(1) The manufacturing of foodstuffs, beverages and tobacco products branch includes all homogeneous production units that manufacture the targeted products.

BREAKDOWN OF KEY FIGURES BY CATEGORY OF FOOD BUSINESSES IN 2019 (in %)

Source: Insee - Esane, SSP processing



Scope: enterprises in the agri-food industries (AFIs) and wholesale trade, excluding tobacco, including the French overseas departments. Micro-enterprises (MICs) employ fewer than 10 people and have a turnover or balance sheet of less than 2 M€ per year.

Small and medium-sized enterprises (SMEs) employ fewer than 250 people and have a turnover of less than 50 M€ or balance sheet of less than 43 M€.

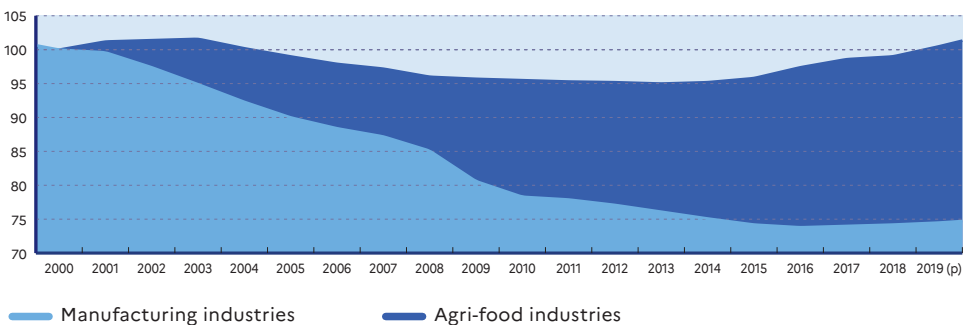
Medium-sized enterprises (MSEs) employ between 250 and 5,000 employees and have a turnover of less than 1.5 billion euros or a balance sheet of less than 2 billion euros.

The remaining companies are large enterprises (LE).

EMPLOYMENT IN THE AFI AND MANUFACTURING INDUSTRIES SINCE 2000 (excluding temporary work)

(base 100 in year 2000)

Source: Insee - Localized employment estimates (ESTEL)

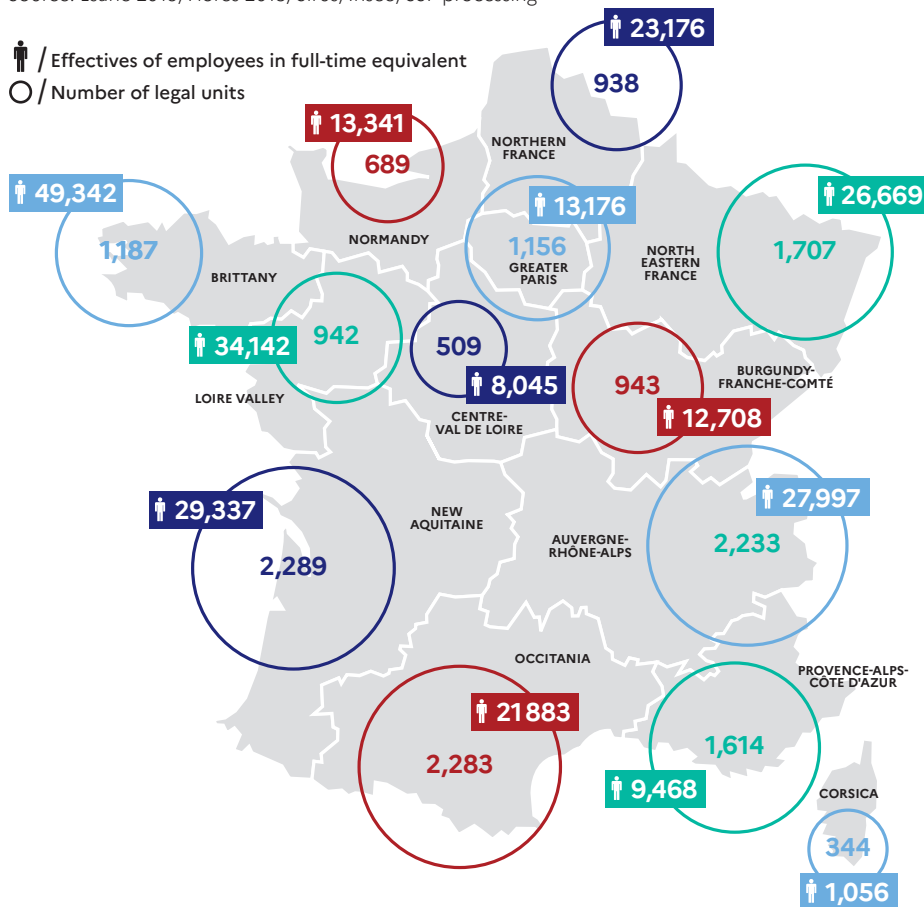


Scope: Metropolitan France, gross data including commercial craft. The source does not make it possible to distinguish between commercial craft industries within the agri-food industries (including beverage manufacturing).

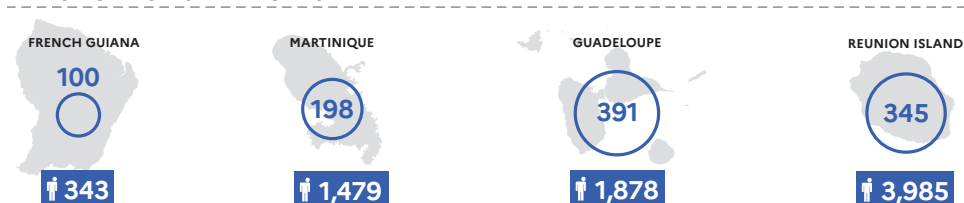
(p) Provisional estimates

BREAKDOWN OF THE AGRI-FOOD INDUSTRY COMPANIES AND ASSOCIATED JOBS IN THE FRENCH REGIONS

Source: Esane 2019, Flores 2018, Sirus, Insee, SSP processing



FRENCH OVERSEAS TERRITORIES



Scope: AFI of which beverage manufacturing and excluding artisanal food production.

Number of mono-regional or quasi-mono-regional legal units and their FTEs.

Note: The regional breakdown was calculated from the 2018 figures and completed by the SIRUS directory. The figures presented are provisional.

A company may be located in several regions. These data are based on mono-regional or quasi-mono-regional legal units.

Mono-regional enterprise: all employees (or establishments) are in the region.

Quasi-mono-regional company: the number of employees (or in the establishments) is more than 80% in the region.

ECONOMIC PERFORMANCE OF THE AGRI-FOOD INDUSTRY: DISPARITIES BETWEEN SECTORS

DATA ON THE TOP 5 SECTORS OF THE FOOD INDUSTRY IN FRANCE IN 2019

Source: Insee - Esane, SSP treatment

Number of employees in FTE



Sales in France and abroad, by sector (in millions of euros)



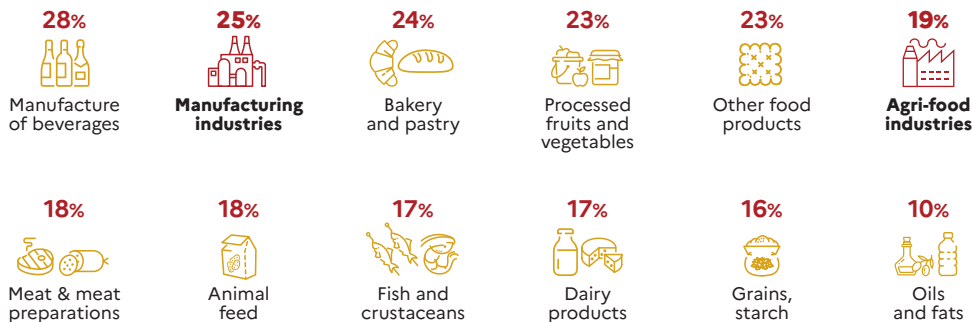
Sales excluding exports - Export sales

Scope: enterprises in the agri-food industries and agri-food wholesale trade, excluding artisanal food production and tobacco, including the French overseas departments.

VALUE ADDED RATE IN 2019

(Value added by sales (including other income and other expenses))

Source: Insee - Esane, SSP treatment



INVESTMENT RATE (AVERAGE 2018-2019)

(investments / value added)

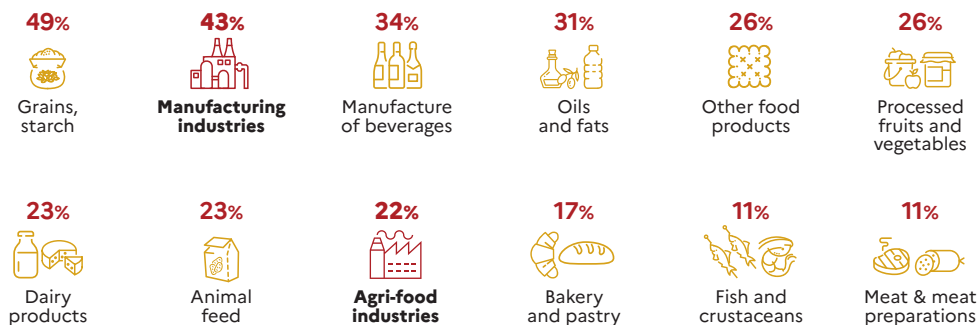
Source: Insee - Esane, SSP treatment



EXPORT RATE OF COMPANIES IN 2019

(export sales / total sales)

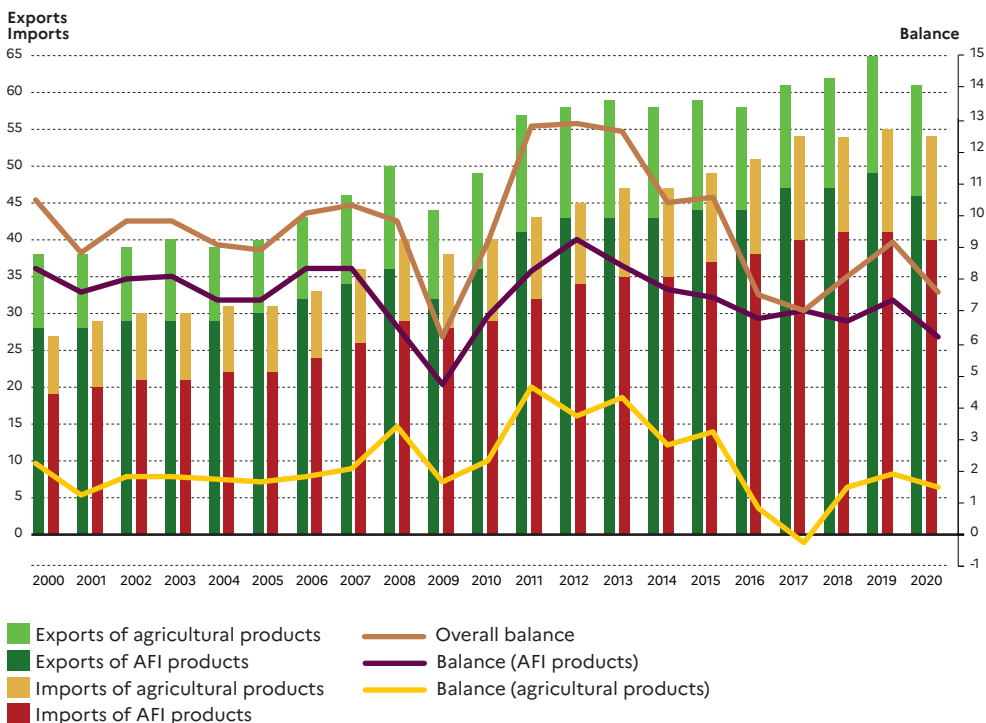
Source: Insee - Esane, traitements SSP



INTERNATIONAL TRADE

CHANGES IN IMPORTS, EXPORTS AND THE AGRI-FOOD TRADE BALANCE INCLUDING BEVERAGE MANUFACTURING BUT EXCLUDING TOBACCO (€bn)

Source: Customs



DETAIL OF TRADE BALANCES (€bn)

Source: Customs

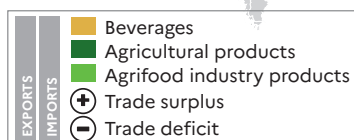
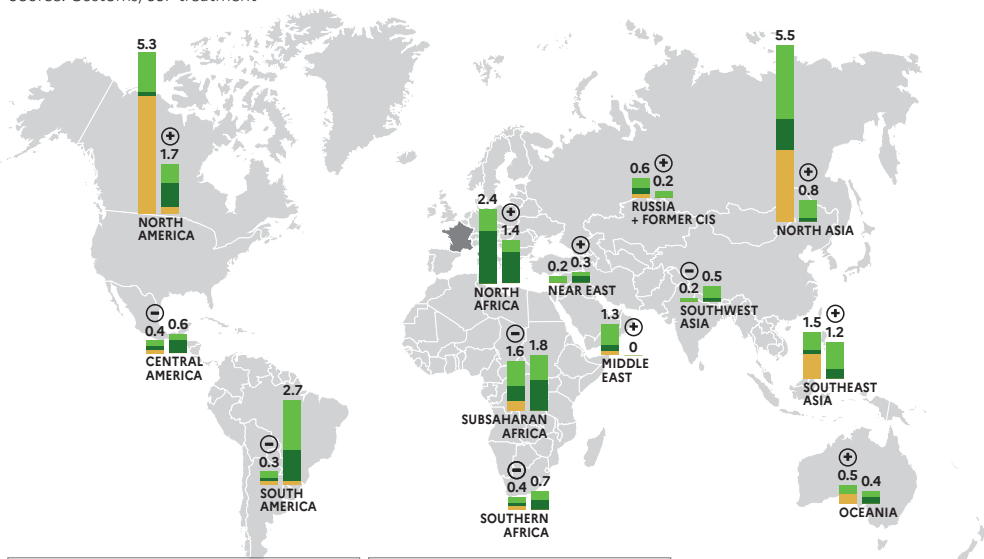
Note: Trade balance = exports – imports

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total AFI	8	6	5	7	8	9	8	8	7	7	7	7	7	6
Total gross farm products	2	3	2	2	5	4	4	3	3	1	0	1	2	1
Total AFI excluding beverages	-1	-2	-3	-2	-1	-2	-2	-3	-4	-5	-5	-6	-6	-5

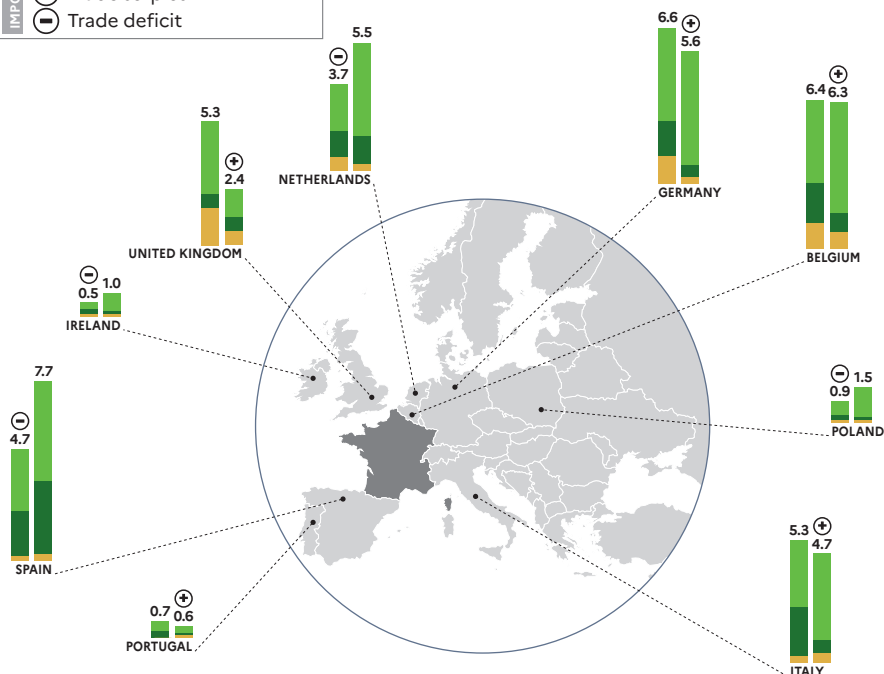
Scope: AFI including artisanal food production, agriculture and fisheries, France

EXPORTS AND IMPORTS OF AGRICULTURAL AND AGRIFOOD PRODUCTS FROM FRANCE TO THE WORLD IN 2020 (€bn)

Source: Customs, SSP treatment



Exports 41 M€
 Imports 41.3 M€
 Western Europe + CEEC



Scope: farming and agrifood products, France.

QUALITY APPROACH IN THE AGRIFOOD INDUSTRY

THE DIFFERENT SIGNS IDENTIFYING QUALITY AND ORIGIN (SIQO)

Source : INAO, données 2020



Label rouge
436 certified specifications



AOC/AOP
101 appellations (excluding wines and spirits), 363 wines and 17 spirits



STG
2 specifications



IGP
146 indications (excluding wines and spirits) and 74 wines



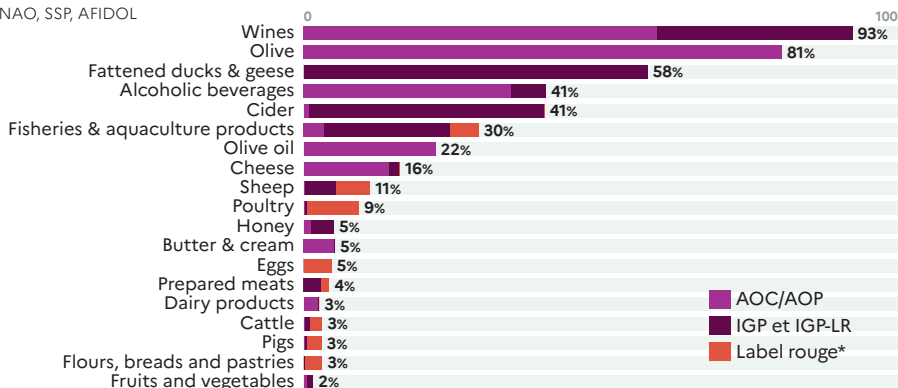
IG
35 spirit drinks (excluding AOC spirit drinks which are also geographical indications at European level)



AB
9.5% of the Utilised agricultural area

SHARE IN VOLUME OF SIQO (EXCLUDING ORGANIC) BY SECTOR IN 2020

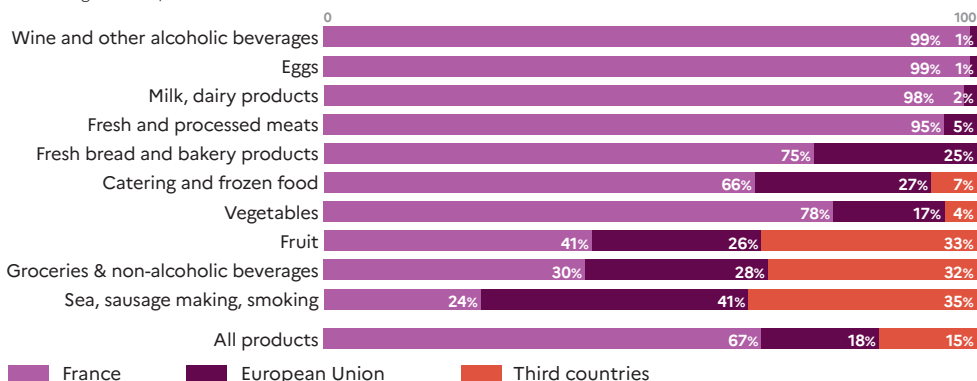
Source: INAO, SSP, AFIDOL



* for Poultry and eggs, this category includes Poultry marketed as IGP-LR

ORIGIN OF SUPPLY BY ORGANIC PRODUCTS IN 2020 (in %)

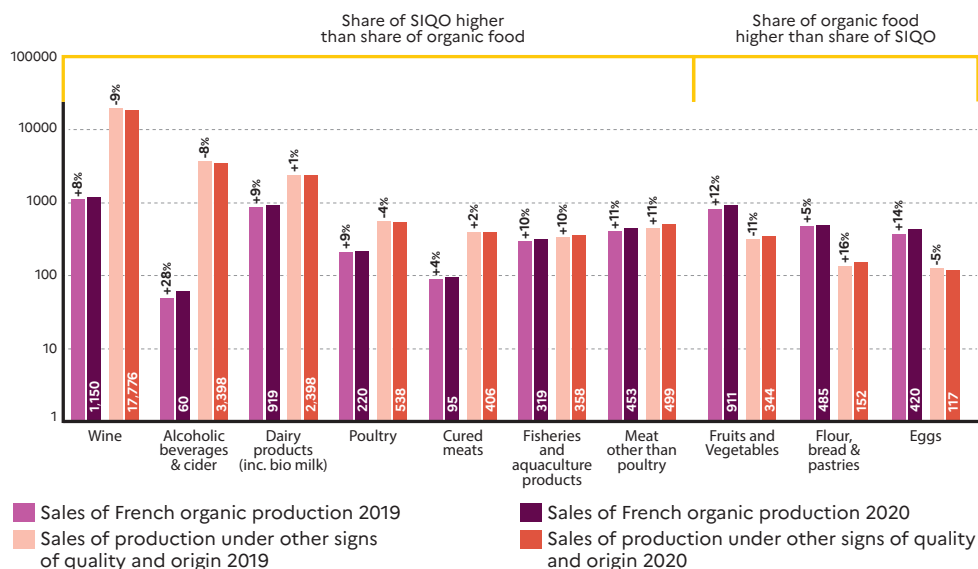
Source: Agence Bio / AND-International 2021



Sales of organic products in France grew by **10.4%** between 2019 and 2020 and represent a total turnover of nearly **€13.2 billion** in 2020. Although the COVID-19 health crisis has strongly affected the contract catering sector (-32.3% of organic turnover in 2020), household home consumption has more than compensated this decline, with annual growth of more than **€1.3 billion** in 2020. In 2020, organic food represents **69,800 direct jobs** in France in processing and distribution.

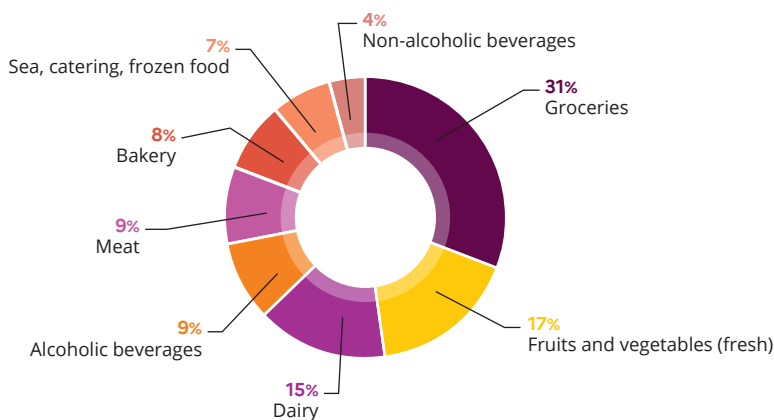
ORGANIC SALES AND SALES OF OTHER SIQO IN 2020 AND CHANGE FROM 2019 (€bn)

Source: INAO and Agence BIO



VALUE DISTRIBUTION OF HOUSEHOLD PURCHASES OF ORGANIC PRODUCTS IN 2020

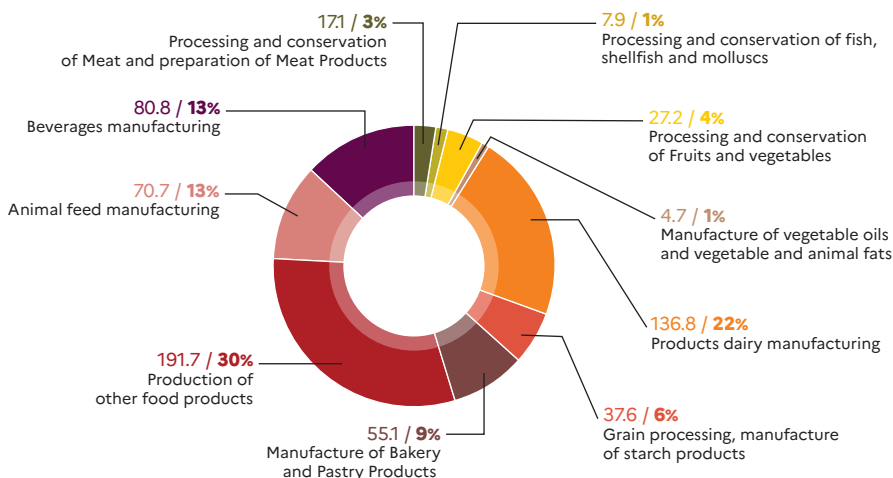
Source: Agence Bio / AND-International 2020



INNOVATION, A KEY FACTOR FOR COMPETITIVENESS

DOMESTIC EXPENDITURE ON RESEARCH AND EXPERIMENTAL DEVELOPMENT (DERED) OF ENTERPRISES BY RESEARCH SECTOR IN 2019 - NAF REV.2 GROUPS 10.1 TO 11.0, SEMI-FINAL DATA (M€ & percentage)

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

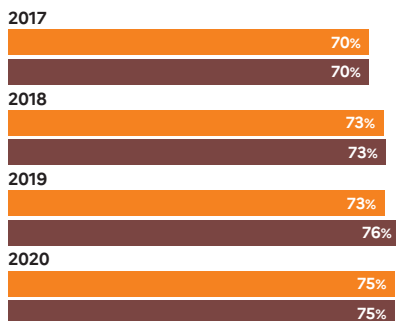


The DERED of the food and beverage industry represents 2.6% of the DERED of all manufacturing industries.

PENETRATION OF E-COMMERCE IN THE FOOD INDUSTRY

Evolution of the share of companies with a website

Source: Insee - TIC 2020, SSP treatment



Evolution of the share of online sales

Source: Insee - TIC 2020, SSP treatment



Agri-food industries (AFI)

Manufacturing industry (including food processing)

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 geographically individualized production unit, but legally dependent on the enterprise. It is identified by its 14-digit SIRAND number.

FTE: full-time equivalent = total number of hours worked / annual average of hours worked in full-time jobs in the economic territory.

Enterprise in the legal sense or "legal unit": the enterprise in terms of «legal unit» is a legal entity under public or private law. This legal entity can be: a legal person, whose existence is recognized by law independently of the persons or institutions that own it or are members of it; a natural person, who, as a self-employed person, can exercise an economic activity. It must be declared to the competent administrations (court registries, social security, DGI) in order to exist. The legal unit is the main unit registered in SIRENE. This definition of the legal unit should not be confused with that of the company in the economic sense, considered as a statistical unit.

Gross value added (GVA) or value added excluding tax: value of production – intermediate consumption (goods and services transformed or entirely consumed during the production process).

Value added at factor cost (VAFC): gross VA – taxes on production + operating subsidies.

Value added rate: VA / turnover.

Esane margin rate: gross operating surplus (VAFC - wages - taxes + subsidies) / VAWC.

National accounting margin rate: gross operating surplus / gross VA.

Investment rate: gross tangible investments excluding contributions / VAFC.

Export rate: share of sales generated by exports.

Data scope: the AFIs cover divisions 10 and 11 of the NAF rev2 (nomenclature of activity), except for the commercial craft sector (sub-classes 1013B, 1071B, C and D of the NAF rev2). The «tobacco manufacturing» sector is excluded.

Note that the concept of artisanal food production does not completely overlap with the general concept of artisanal food. Companies may be classified in subclasses of divisions 10 and 11 that do not relate solely to a crafts-type activity (e.g. manufacture of ice cream and sherbet), or in subclasses of division 47 (retail trade) that may include processing activities (e.g. butcher shops, tripe shops). The artisanal activity is defined by the decree n° 98-247 of April 2, 1998 relating to the artisanal qualification and to the commercial register.

PRODUCTION

> Farming & fisheries

PROCESSING

> Food industry

Div. 10 NAF Rév 2

> Beverages

Div. 11

> Tobacco

Div. 12

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

} Agrifood Industry

MARKETING

> Wholesale commerce

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

> Artisanal food production

1013B: meat-based preparations
10.71B, C et D: baking and manufacture of bakery and pastry products

> Retail commerce (inc. supermarkets)

> Out-of-home catering



→ Read more

<https://agreste.agriculture.gouv.fr/agreste-web/>

Figures and Data No. 2021-15 Agri-food industries and wholesale trade in 2019: economic results

Graph'Agri 2021: Agriculture, forestry, fisheries and agrifood industries

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MAY 2022

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