



MINISTÈRE  
DE L'AGRICULTURE  
ET DE LA SOUVERAINETÉ  
ALIMENTAIRE

*Liberté  
Égalité  
Fraternité*



# Panorama of agrifood industries

## Key figures and indicators



EDITION 2024



# SUMMARY

---

**4**

GENERAL DATA

---

**8**

ECONOMIC PERFORMANCE  
OF THE AGRIFOOD INDUSTRY :  
DISPARITIES BETWEEN SECTORS

---

**10**

INTERNATIONAL TRADE

---

**12**

A QUALITATIVE APPROACH TO  
AGRIFOOD

---

**14**

INNOVATION, A KEY FACTOR  
COMPETITIVENESS IN AGRIFOOD

---

**15**

DEFINITIONS

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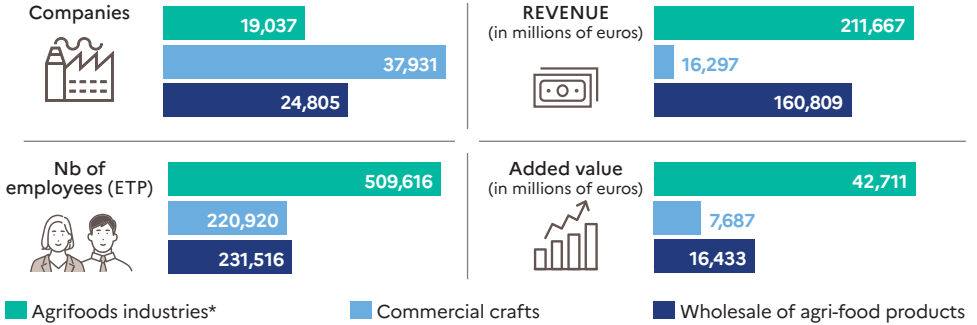


# GENERAL DATA

As of December 31, 2021, across all agri-food companies, French agri-food industries (IAA) employed **962,052 full-time equivalents** within **81,773 companies** (legal units).

## KEY FIGURES FOR AGRI-FOOD COMPANIES IN 2021

Source: Insee - Esane, SSP treatment

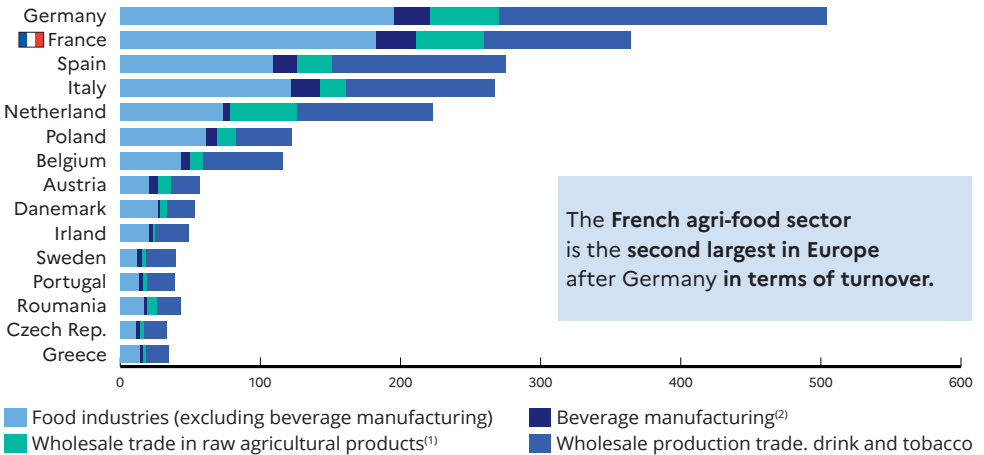


\* (inc. Beverage production)

Scope: IAA, commercial crafts and agri-food wholesale trade, DOM included.

## REVENUE EXCLUDING VAT OF EU COUNTRIES IN 2020 (in billions of euros)

Source: Eurostat



The French agri-food sector is the **second largest in Europe** after Germany in terms of turnover.

(1) Including live animals.

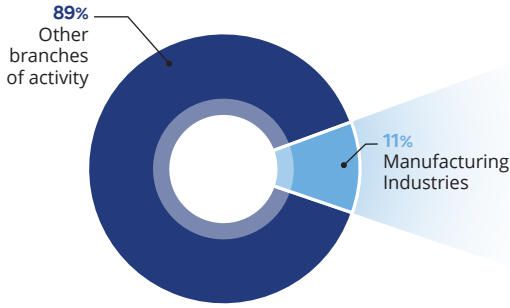
(2) For Ireland, the turnover of the food and beverage manufacturing industries is estimated.

Note : the 15 countries represented in the graph represent 94% of the turnover of the food industries of the EU 27.

Scope: IAA including commercial crafts and agri-food wholesale trade.

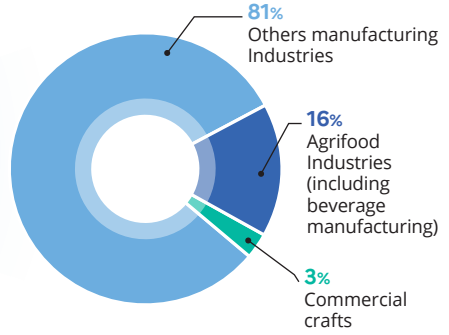
## WEIGHT OF MANUFACTURING INDUSTRIES IN GROSS DOMESTIC PRODUCT IN 2021

Source: Insee, National Accounts - 2014 base



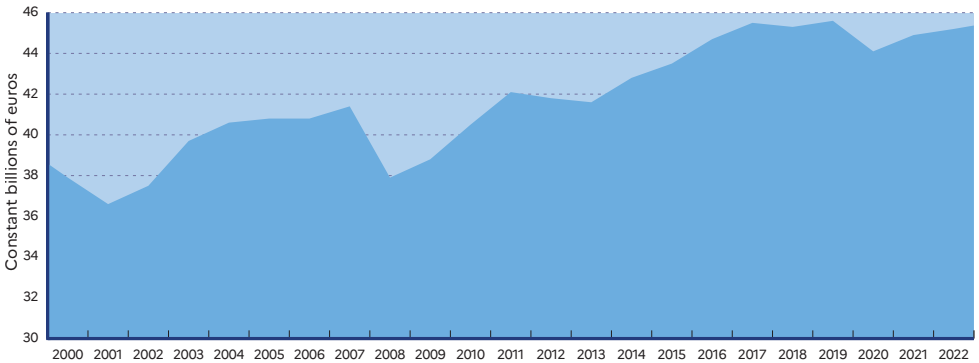
## WEIGHT OF IAA (ADDED VALUE) IN MANUFACTURING INDUSTRIES IN 2022

Source: Insee - Esane



## GROSS ADDED VALUE OF THE AGRI-FOOD SECTOR<sup>(1)</sup>

Source: Insee, National Accounts - 2014 base

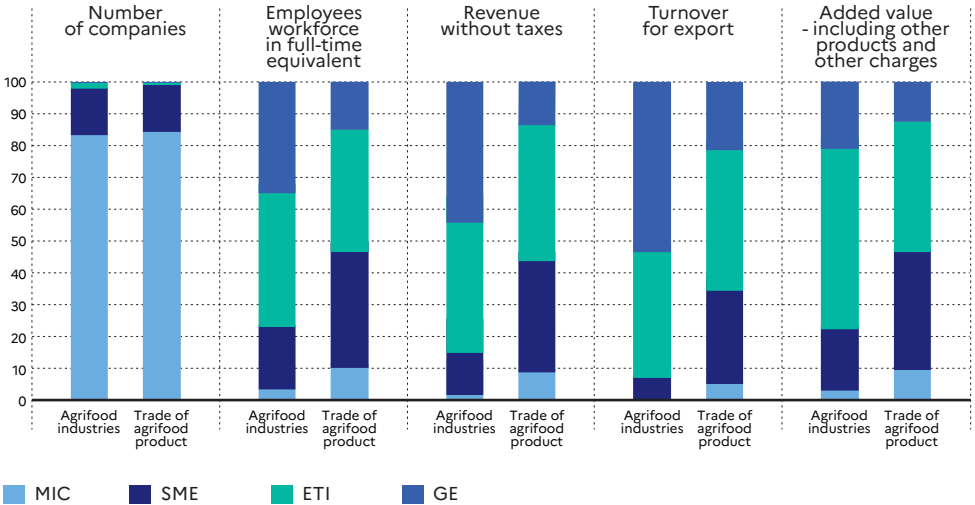


— Billions of euros

(1) The branch, manufacturing of foodstuffs, drinks and tobacco-based products, brings together all the homogeneous production units manufacturing the products.

## DISTRIBUTION OF KEY FIGURES BY CATEGORY OF AGRI-FOOD COMPANIES IN 2020 (i n %)

Source: Insee - Esane, SSP treatment



Scope: companies in the agri-food industries and wholesale trade, tobacco excluded, DOM included.

Micro-enterprises (MIC) employ fewer than 10 employees and have a turnover or balance sheet total of less than 2 million euros per year.

Small and medium-sized enterprises (SMEs) employ fewer than 250 employees and have a turnover of less than 43 million euros or a balance sheet total of less than 4 million euros.

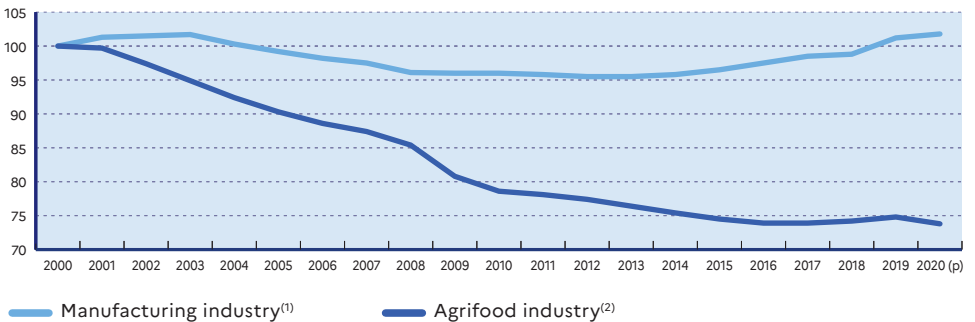
Mid-sized companies (ETI) employ 250 to 5,000 employees and have a turnover of less than 1.5 billion euros or a balance sheet total of less than 2 billion euros.

Large enterprises (GE) represent the remaining companies.

## EVOLUTION OF EMPLOYMENT IN IAA AND IN THE MANUFACTURING INDUSTRY SINCE 2000 (excluding interim)

(base 100 year 2000)

Source: Insee - Localized employment estimates (ESTEL)



(1) Holders of temporary employment contracts are included in the temporary work activity.

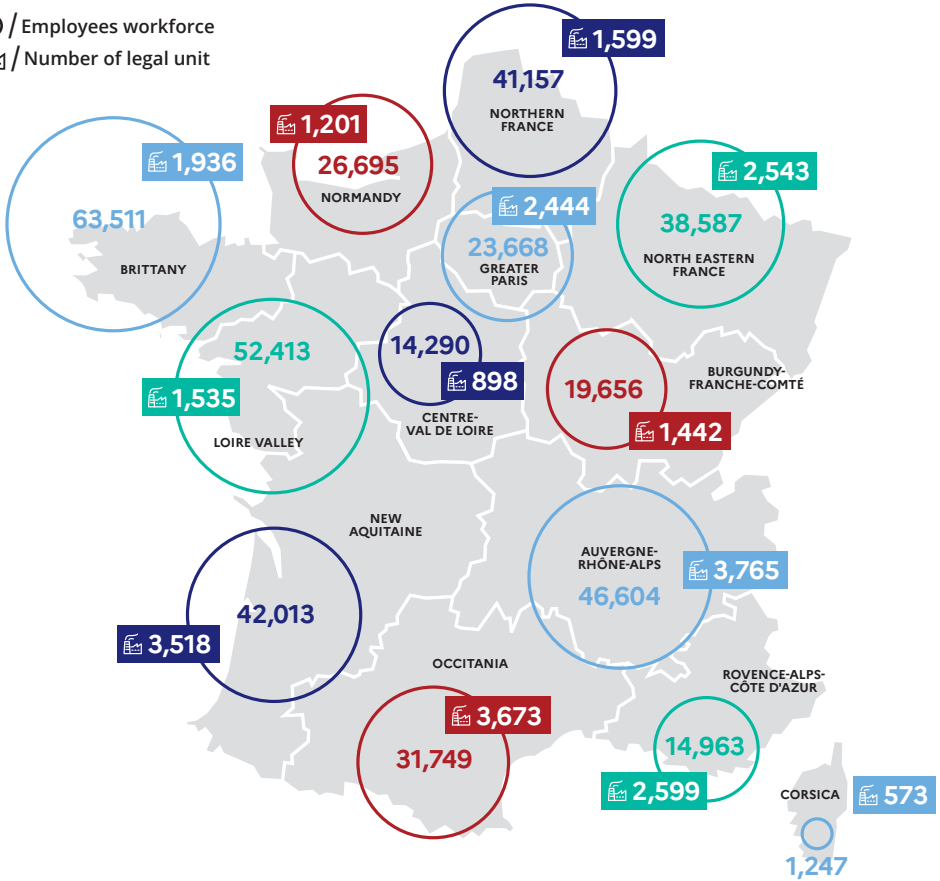
(2) Including commercial crafts. The source does not make it possible to distinguish commercial crafts within the food industries. Scope: France (excluding Mayotte), raw data including commercial crafts. The source does not make it possible to distinguish commercial crafts within the agri-food industries (including beverage manufacturing).

(p) Provisional estimates.

# DISTRIBUTION OF AGRIFOOD INDUSTRIES AND ASSOCIATED JOBS IN THE FRENCH REGIONS

Source: Esane 2021, Flores 2021, Sirius, Insee, SSP treatment

○ / Employees workforce  
 🏢 / Number of legal unit



## OVERSEAS DEPARTMENTS

FRENCH GUIANA

349

193

MARTINIQUE

1,789

361

GUADELOUP

2,027

820

REUNION ISLAND

4,921

596

Scope: IAA including beverage manufacturing and excluding commercial crafts, France. Number of mono-regional or quasi-mono-regional legal units and their FTEs.

Note: regionality was calculated from that of 2020 and supplemented by the SIRUS directory. The figures presented are provisional.

A company can be located in several regions. These data are based on mono-regional or quasi-mono-regional legal units. Mono-regional company: all employees (or failing that the establishments) are in the region.

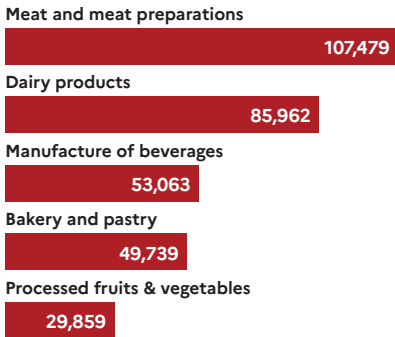
Almost mono-regional company: the number of employees (and failing that the establishments) is more than 80% in the region.

# ECONOMIC PERFORMANCE IN AGRIFOOD INDUSTRIES: DISPARITIES BETWEEN SECTORS

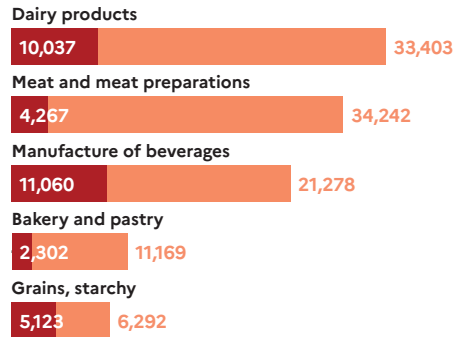
## DATA ON THE TOP 5 SECTORS OF THE FOOD INDUSTRY IN FRANCE IN 2021

Source: Insee - Esane, SSP treatment

### Number of employees in FTE



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



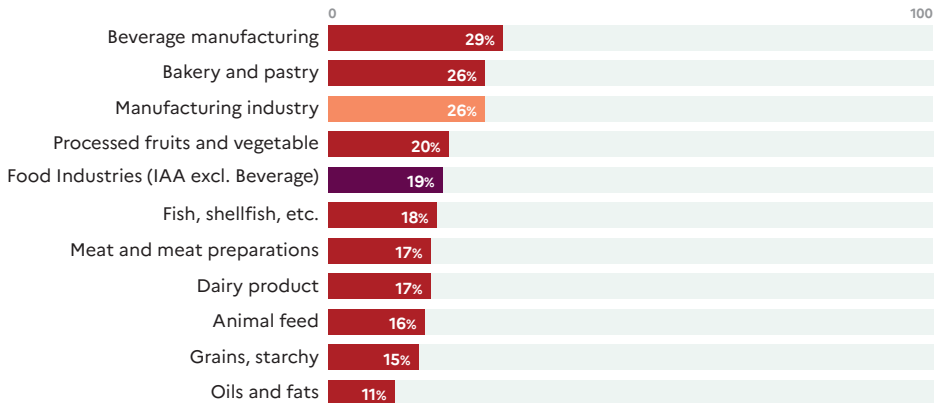
Scope: enterprises in the agri-food industries and agri-food wholesale trade, excluding artisanal food production and tobacco, including the French overseas departments.

■ Sales excluding exports  
■ Export sales

## VALUE ADDED RATE IN 2021

(added value including other income and other expenses / turnover)

Source: Insee - Esane, SSP treatment



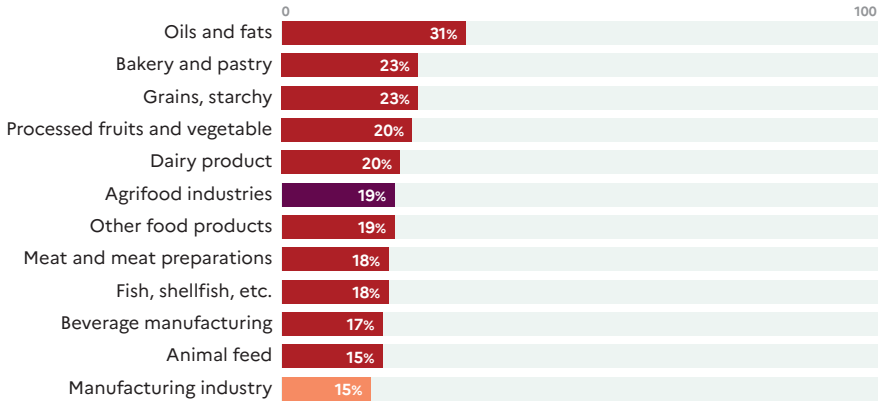
Scope: Agrifood industries excluding commercial crafts and manufacturing industry, France.



## AVERAGE INVESTMENT RATE 2020-2021

(investments / added value)

Source: Insee - Esane, SSP treatment

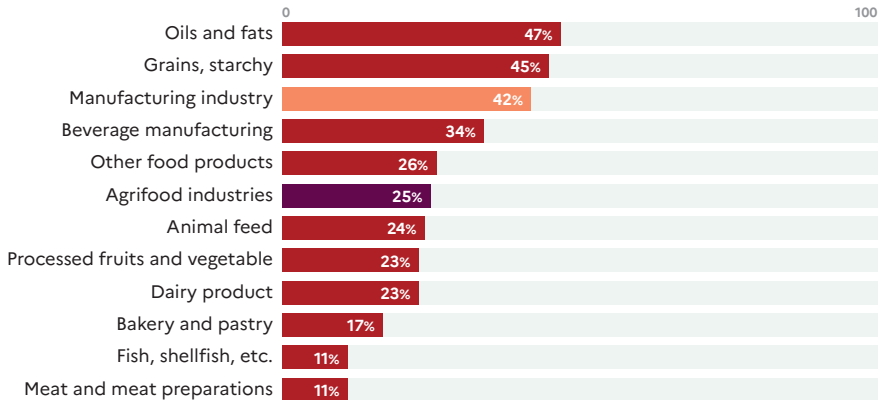


Scope: IAA excluding commercial crafts and manufacturing industry, France.

## BUSINESS EXPORT RATE IN 2021

(export turnover / total turnover)

Source: Insee - Esane, SSP treatment

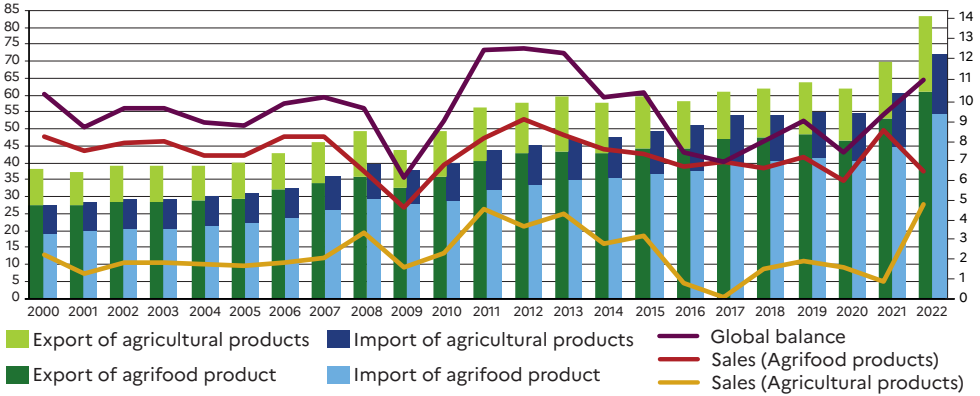


Scope: IAA excluding commercial crafts and manufacturing industry, France.

# INTERNATIONAL TRADE

## EVOLUTION OF IMPORTS, EXPORTS AND TRADE BALANCE AGRI-FOOD (in billions of euros)

Source: Customs



Note: trade balance = exports - imports

Scope: IAA including commercial crafts, agriculture and fishing, France

## DETAILS OF COMMERCIAL SALES (in billions of euros)

Source: Customs

	2017	2018	2019	2020	2021	2022
<b>Sales of agricultural products</b>	0	1	2	1	1	5
<b>Sales of agrifood products</b>	7	7	7	6	9	6
- Excluding beverages	-5	-6	-6	-5	-6	-10
- including beverages	12	12	13	11	15	16
<b>Global Sales</b>	7	8	9	7	10	11

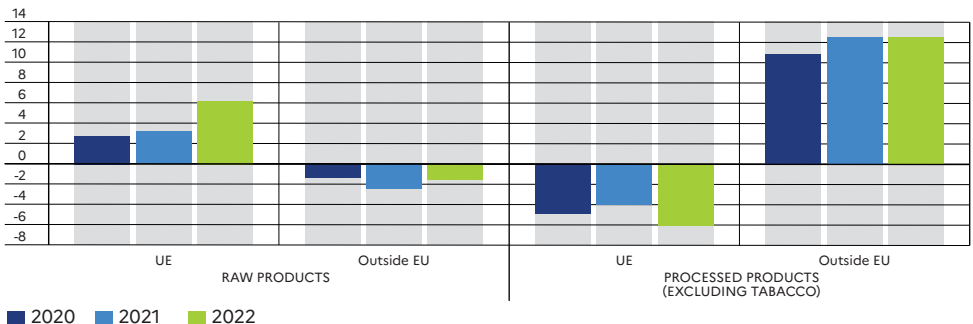
Scope: IAA including commercial crafts, agriculture and fishing, France

Note: trade balance = exports - imports

## EVOLUTION OF TRADE WITH THIRD COUNTRIES AND THE EUROPEAN UNION (in billions of euros)

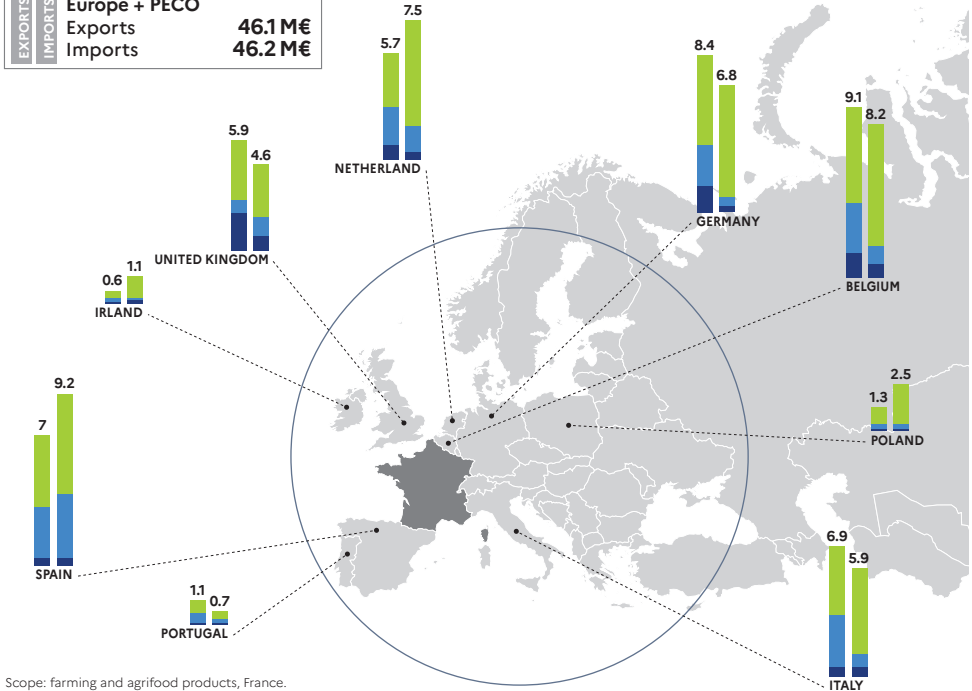
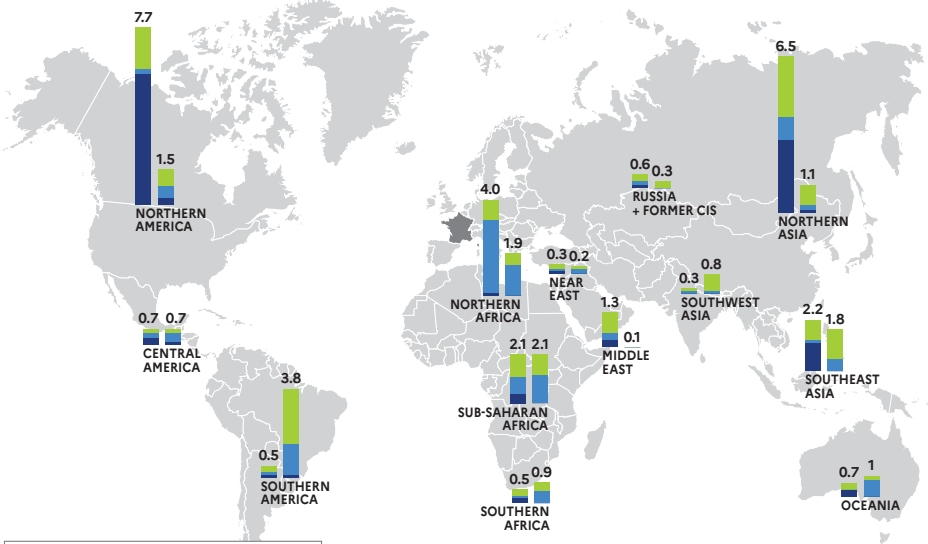
Source: DGDDI (customs)

### In 2022, trade in processed products will deteriorate



# EXPORTS AND IMPORTS OF AGRICULTURAL AND AGRI-FOOD PRODUCTS OF FRANCE IN THE WORLD IN 2022 (in billions of euros)

Source: customs, SSP treatment

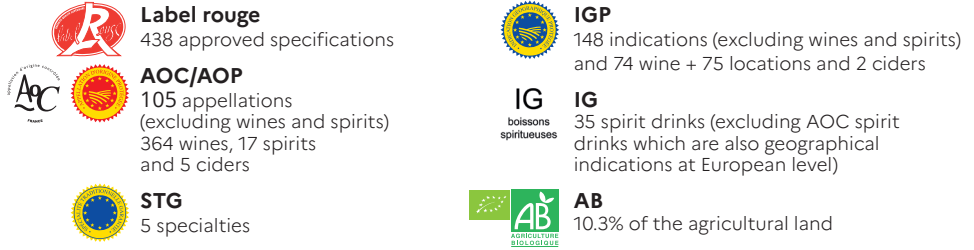


Scope: farming and agrifood products, France.

# A QUALITATIVE APPROACH TO AGRIFOOD

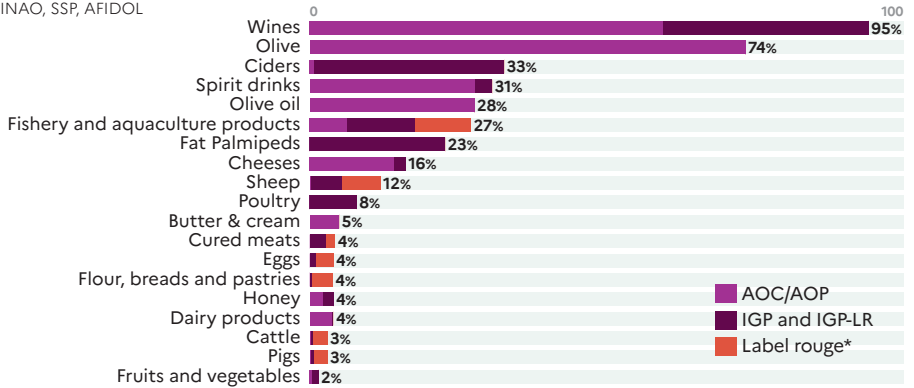
## THE DIFFERENT QUALITY AND ORIGIN IDENTIFICATION SIGNS (SIQO)

Source: INAO, data May 2021



## VOLUME SHARE OF SIQO (EXCLUDING ORGANIC) IN THEIR NATIONAL SECTOR IN 2021

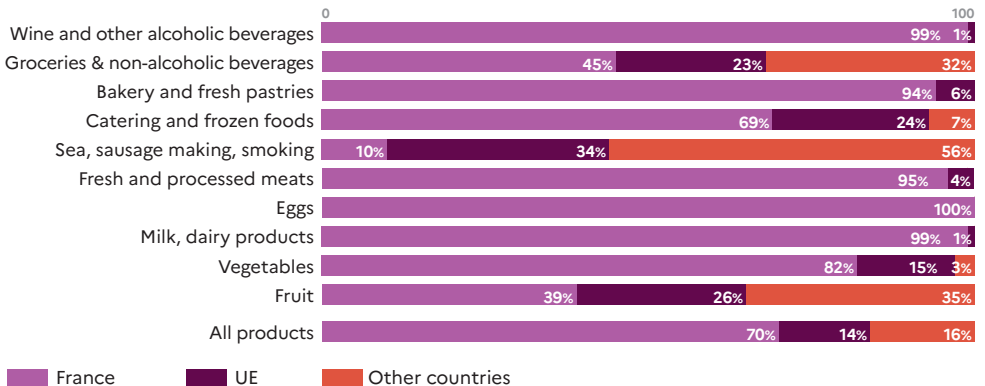
Source: INAO, SSP, AFIDOL



\* For poultry and eggs, this category includes poultry marketed under IGP-LR

## ORIGIN OF SUPPLIES ACCORDING TO ORGANIC PRODUCTS IN 2022 (in %)

Source: Agence Bio / ANDI

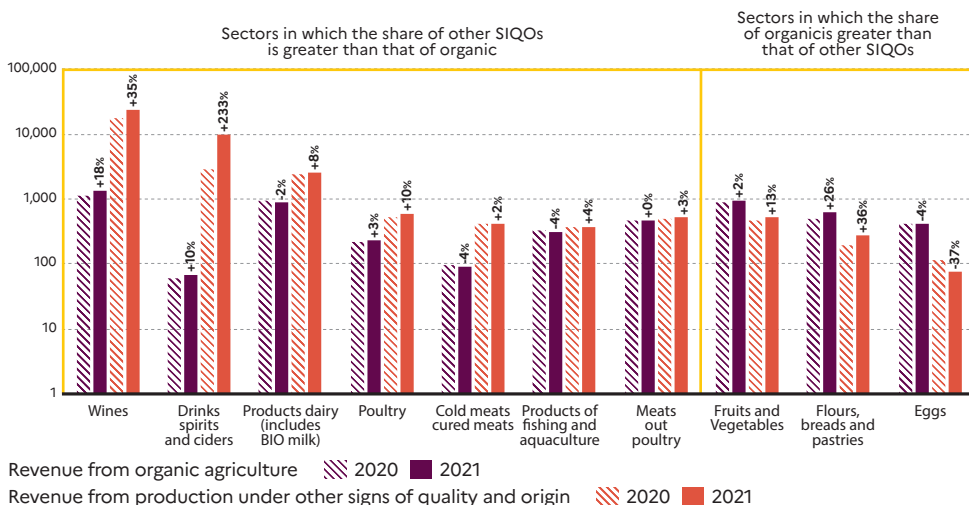


Organic agricultural sectors continue to develop in France, but in 2022, growth will slow down: **+3.5%** additional producers, **+2.7%** of surface areas involved. They maintain and generate more than **200,000 jobs** in the territories and enable to meet consumer demand. **60,483 farms** were engaged in organic farming at the end of 2022, i.e. **14% of farms** and **16% of agricultural employment**. Thus, 2.88 million hectares were cultivated organically, or 10.7% of the French UAA. The value of organic food purchases fell by 4.6% compared to 2021, with a total turnover of almost **12 billion euros**.

## ORGANIC TURNOVER AND TURNOVER OF OTHER SIQO IN 2021 AND EVOLUTION COMPARED TO 2020 (in millions of euros, logarithmic scale)

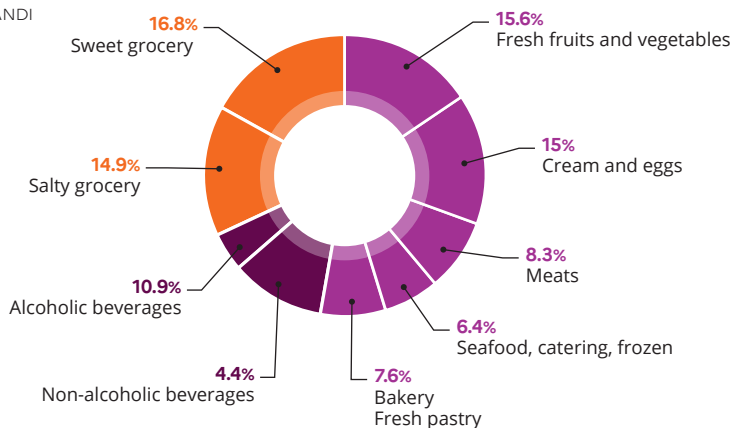
Source: INAO et Agence BIO

### Differences in revenue between BIO and other SIQO compared to 2020



## VALUE DISTRIBUTION OF PURCHASES OF ORGANIC PRODUCTS BY HOUSEHOLDS IN 2022

Source: Agence Bio / ANDI



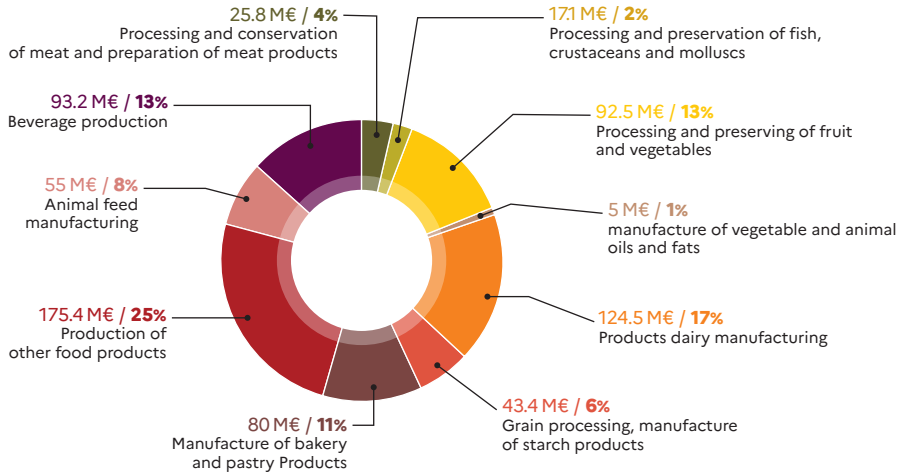
Fresh 53% | Drinks 15.4% | Others 31.6%

# INNOVATION: A KEY FACTOR OF COMPETITIVENESS

## DOMESTIC SPENDING ON RESEARCH AND EXPERIMENTAL DEVELOPMENT BY ENTERPRISE AND BY RESEARCH BRANCH IN 2021 - NAF RÉV.2 GROUPES 10.1 À 11.0

(in millions of euro and as a percentage)

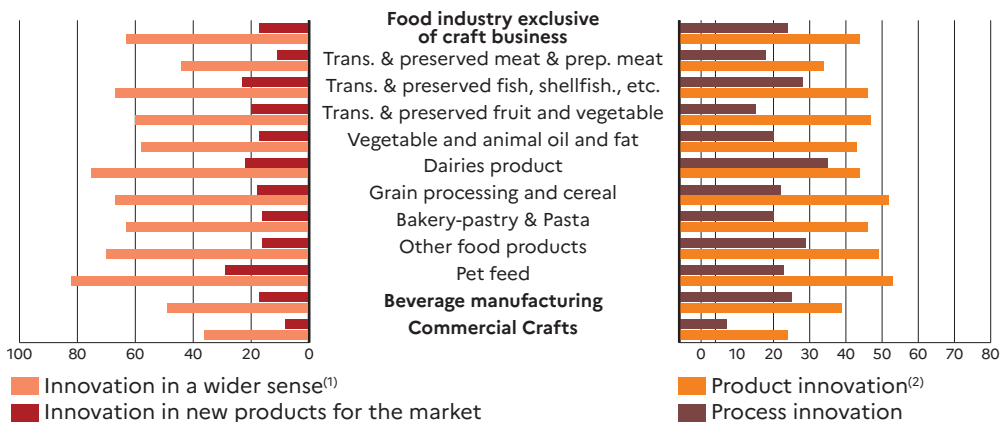
Source: Mesri-Sies. Final 2020 data



Note: the BERD from the food and beverage industry accounts for 2.9% of BERD from all manufacturing industries.

## PROPORTION OF INNOVATIVE COMPANIES BETWEEN 2018 AND 2020 BY TYPE OF INNOVATION (in % of every enterprise)

Source: Insee, Enquête communautaire sur l'innovation (CIS 2020), SSP treatment



(1) This includes product and process innovation (including organization and marketing), ongoing and discontinued innovation activities, and the development of R&D activities.

(2) For each term see glossary « innovation (IAA) ».

(3) Exclusive of craft business.

# DEFINITIONS

**Enterprise:** the smallest combination of legal units constituting an organizational unit for the production of goods and services, with a certain degree of decision-making autonomy, notably for the allocation of its current resources.

**Establishment:** geographically individualized production unit, but legally dependent on the company. It is identified by its 14-digit SIRET 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 company in terms of «legal unit» is a legal entity under public or private law. This legal entity may be: a legal person, whose existence is recognized by law independently of the persons or institutions that own or are members of it; a natural person, who, as a self-employed person, may carry on an economic activity. In order to exist, it must be declared to the relevant authorities (court registries, social security, DGI, etc.). 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 - production taxes + operating subsidies.

**Value added rate:** revenues.

**Profit margin Esane:** gross operating surplus (VACF – salaires – taxes + subventions) / VACF.

**Profit margin of the national accounting:** gross operating income / VA brute.

**Returns on investments:** investissements corporels brut hors apports / VACF.

**Export rates:** share of sales generated by exports.

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

It should be noted that the notion of commercial craftsmanship does not completely overlap with the notion of food craftsmanship, for which companies may be classified in sub-classes of divisions 10 and 11 that do not exclusively concern a crafts-type activity (e.g.: ice-cream and sorbet manufacture), or in sub-classes of division 47 (retail trade) that may concern processing activities (e.g.: butcheries, triperies...). Artisanal activity is defined by Decree no. 98-247 of April 2, 1998 on artisanal qualification and the trades register.

## PRODUCTION

- Agriculture and fishery

## PROCESSING

- Food industry  
Div. 10 NAF Rév 2
- Beverages  
Div. 11
- Tobacco  
Div. 12

Unless otherwise stated, the food industry does not include commercial crafts



## MARKETING

- Wholesale  
462 : raw agricultural produce and live animals  
463 : food and beverages
- Artisanat commercial  
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

→ To know more

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

Figures and Data n° 2023-7 - Agri-food industries  
and wholesale trade in 2021

Graph'Agri 2023 : Agriculture, forestry,  
fisheries and agrifood industries

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