



MINISTÈRE
DE L'AGRICULTURE
ET DE LA SOUVERAINETÉ
ALIMENTAIRE

*Liberté
Égalité
Fraternité*

French agriculture, forestry and fisheries: an overview

An aerial photograph of a French rural landscape. The scene is dominated by a patchwork of green agricultural fields, some of which are divided by hedgerows. Interspersed among the fields are dense, dark green forested areas. In the lower right portion of the image, a small village or hamlet is visible, characterized by several buildings with red-tiled roofs and a winding road. The overall impression is one of a well-maintained, productive rural environment.

France is characterised by the diversity of its landscapes, products and culinary traditions, each with its own specific features, present throughout both Metropolitan France and its overseas territories.

Our agricultural sector is part of our identity: it has shaped our local regions in all their wide variety. As a source of employment and a factor in the economic and social dynamics of our regions, agriculture contributes actively to the competitiveness of France's economy.

France's farming, forestry and aquaculture sectors are participants in the combat against climate change and the development of a decarbonised economy, constantly adapting to the effects of the disruption of the climate.

Underpinned by French agricultural training, the country's farms are progressively transforming their systems and modes of production in the direction of less dependency on inputs, thereby enhancing their autonomy and resilience

The agrifood industry is the leading French industrial sector, combining tradition, innovation and high technology with the aim of providing safe and sustainable food.

Cover photo:
Haute-Saône countryside
(Bourgogne-Franche-Comté.
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France

France ranks in 42nd place globally for its land area and it is the largest member of the European Union. It is crossed by five major rivers and its landscapes include ocean and maritime coastlines, mountains, plains and plateaux.

As of 1 January 2021, France's population numbered 67.4m living in 18 administrative regions.

Soil preservation, especially on land used for farming activities, is a core priority not only for the continuation of production in sufficient quantity but also for fostering biodiversity effectively and combating climate change.

This is so because the soil plays a key role not only in water cycle regulation but also in carbon capture.



**LAND AREA
AND COASTLINE**

Metropolitan France

543,940 km²

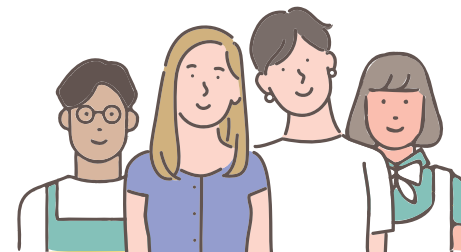
5,853 km of coastline



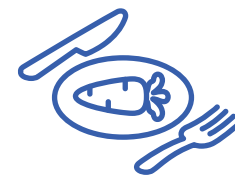
Overseas territories

120,396 km²

1,180 km of coastline



67.4 million
population



The French
devote **21%**
of their budgets
to food

*Purchases of food products and beverages
and out-of-home catering*

LAND USE

Metropolitan France



Woodland
covers
31%
of France



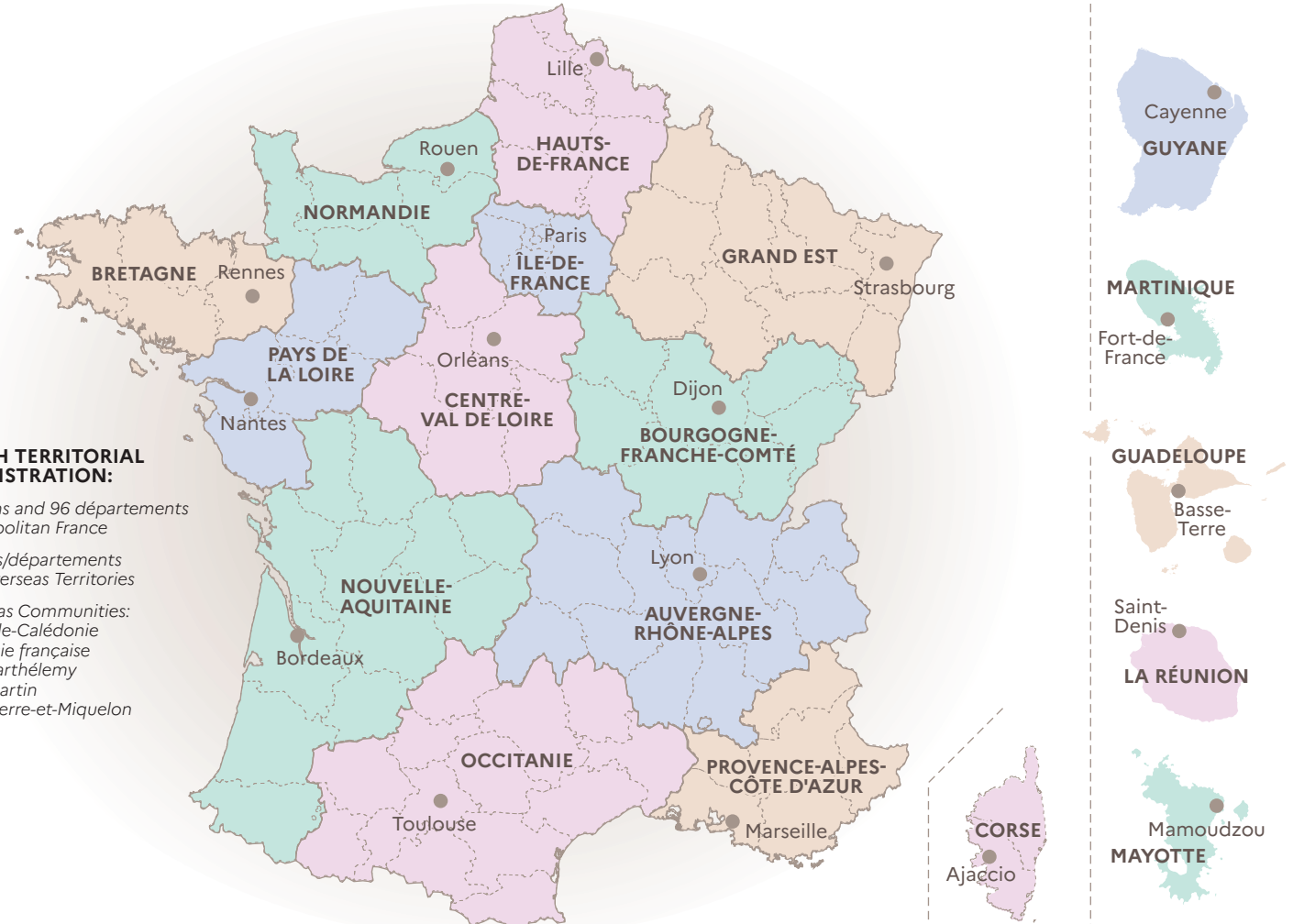
49%
of France
is farmland

FRENCH TERRITORIAL ADMINISTRATION:

13 Regions and 96 départements
in Metropolitan France

5 Regions/départements
in the Overseas Territories

6 Overseas Communities:
– Nouvelle-Calédonie
– Polynésie française
– Saint-Barthélemy
– Saint-Martin
– Saint-Pierre-et-Miquelon



French agriculture

French agriculture is underpinned by the diversity of products, typically of high quality.

Since 1950, the dominant trend in French farming has been towards a faster increase in production and the physical productivity of agricultural activity than in other sectors of the economy. This development is underpinned by mechanisation, specialisation and the enlargement of holdings, plus the development of research activity in conjunction with the agrifood industries. Systems of production continue constant adaptation with the challenges they face while at the same time preserving their characteristic sustainability and quality.

No.1 for EU agriculture
with **18%** of all production
In value terms

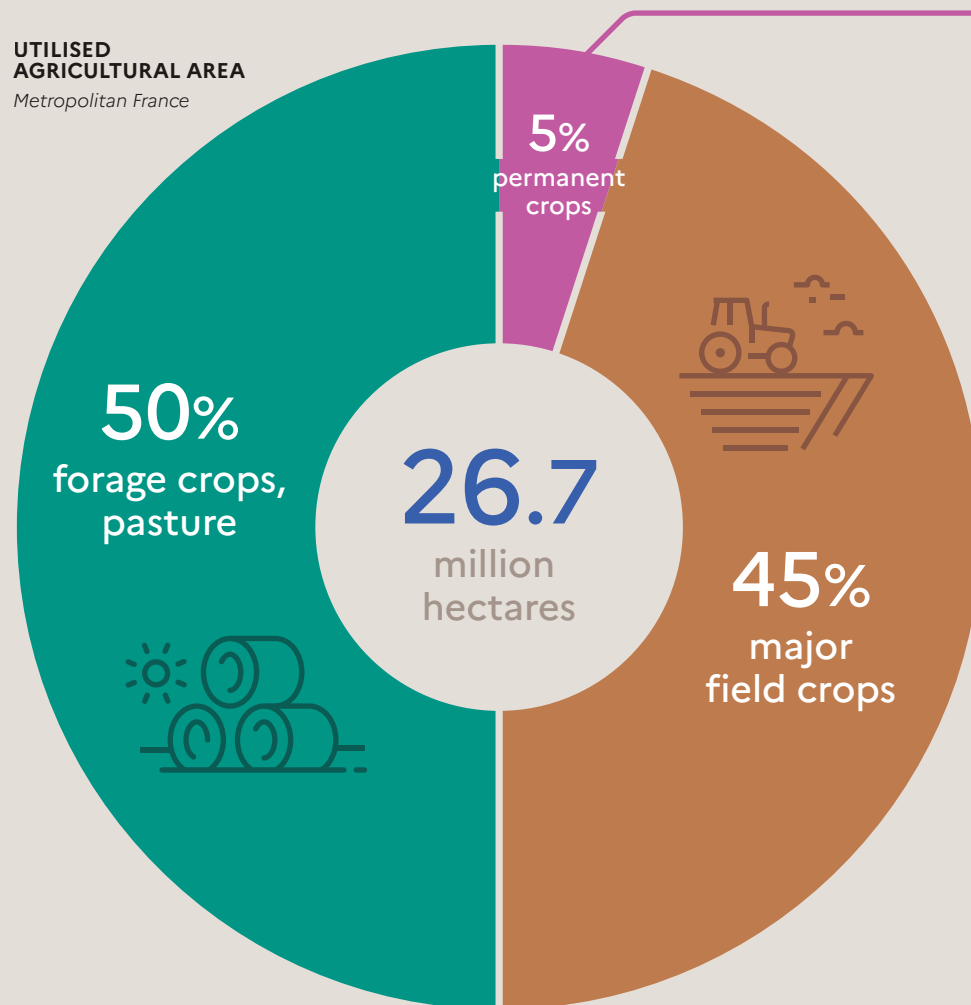
THE VALUE OF AGRICULTURAL PRODUCTION IS

76.6
billion euros




759,000
workers have
permanent jobs
on farms


UTILISED AGRICULTURAL AREA
Metropolitan France



 **79%**
vineyards

 **18%**
orchards

 **3%**
vegetables,
flowers,
etc.

 **89%**
cereals **70%**
oilseeds **17%**
protein crops **2%**

 **5%**
industrial
crops

 **4%**
set-aside

 **2%**
potatoes

LIVESTOCK FARMING, A SPECIFIC
FEATURE OF FRENCH AGRICULTURE



The greatest variety
of cattle breeds
in the world



No. 1
producer
of beef



No. 1
producer
of eggs



No. 2
producer
of milk, butter
and cheese



No. 3
producer
of poultry



No. 3
producer
of pigs



Bretonne Pie Noir cows
on an organic dairy farm
in Loire-Atlantique,
(Pays de la Loire).

©Xavier Remongin

French farms

France leads the Europe for agricultural production, of which the majority is based on family farming and holdings owned by individuals. France had 389,467 agricultural holdings in 2020, employing 1.7 full time equivalents on average and farming an average area of 69 hectares.

In 2020, 58% of all holdings were held by individuals and 42% were incorporated. Individual farms were in the majority except in the dairy and mixed cattle, pigs and poultry sectors. The other types of holding fall into three categories: firstly, limited liability agricultural holdings (EARL) as the most favoured form of incorporation, especially for large farms.

Next, groupings of agricultural holdings (GAEC), in which all the partners are running farms. And lastly, agricultural civil societies (SCEA), these being more flexible where their management and initial capital requirement are concerned.



Agricultural holdings



389,467

holdings

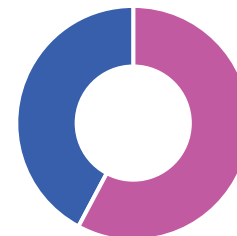
Metropolitan France

AVERAGE FARM SIZE
IS INCREASING BUT REMAINS
A REASONABLY
MANAGEABLE

69

hectares

LEGAL STATUS OF HOLDINGS



58% held by individuals

42% incorporated



12%
are certified
for organic farming

NUMBERS OF HOLDINGS PER SECTOR

Metropolitan France



Major field crops

112 000



Cattle farming

91 000 Dairy 35 000 • Meat 48 000 • Mixed 8 000



Winegrowing

59 000

Mixed crops, mixed livestock

41 000



Sheep, goats and other herbivores

35 000



Pigs, poultry

19 000



Horticulture, market gardening

15 000



Fruit

15 000



Plum harvest
in Lot-et-Garonne
(Nouvelle-Aquitaine).

© Pascal Xicluna

French farmers

759,000 workers hold permanent jobs on agricultural holdings. Given that this figure has been on a downward trend over the years, generational renewal is a priority for France and the European Union. The government is engaged in a proactive programme for the recruitment of new farmers, notably by means of communication campaigns.

In 2018 in Metropolitan France, 57.3% of agricultural work, as measured in Annual Work Units (AWU), was carried out by farm managers of working age, 26.4% by other permanent employees (both salaried and non-salaried) and 16.3% by seasonal workers or outside contractors.



496,000

heads and joint heads
of holding

26% women

**13,400 entries into
the industry in 2019**

AVERAGE AGE

Heads of holding, joint heads and associates

51 years

1/4 are aged 60 or over

Farm managers
are younger on
medium-sized
and large holdings

TRAINING FOR FARMERS



50% of heads of holding
have had a generalist
or agricultural education
to high school diploma
level or above



63% of heads of holding
have had agricultural
training



83% of the under 40s
have a high school
diploma or above

A farm employs
1,7 worker
on average

EMPLOYMENT

In 2016

18% of farms employ
permanent salaried
workers

28% make use
of seasonal labour



Seasonal work is
equivalent to **83,000** full
time workers each year



Livestock farmer
in Haute-Vienne
(Nouvelle-Aquitaine).

©Xavier Remongin

Agricultural training

Agricultural training forms the second biggest educational system in France. This is a singular feature, and is an asset for addressing the new global challenges on farming, food, ecology and energy. It dispenses education and training in schools or via apprenticeships from the secondary level to higher agricultural technician diploma level. Higher education takes this training up to doctoral level (PhD), producing engineers, veterinarians, landscape architects, researchers and teachers. It is characterised by a very high rate of entry into initial employment for young people (greater than 90%) based on constant dialogue with socioeconomic actors and strong links with the research world via a number of institutes of high international repute.

DIVERSE AREAS OF TRAINING:



Farm, forestry and aquacultural production and products of the sea



The processing and marketing of the above



The agrifood and food industries, other industries linked to agriculture



Animal and plant health and protection, food quality and safety



Development, management and protection of rural areas, forests, water, natural habitats and landscape



Personal services and activity leadership in local regions



803
establishments



17
agricultural higher education schools

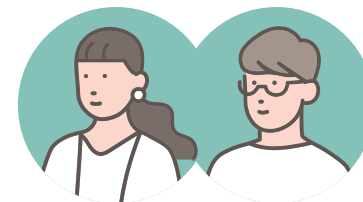
10 public sector higher education establishments for agronomics, veterinary science and landscaping

6 private-sector schools of engineering operating under contract

1 specialist EuroMediterranean institute



192 agricultural holdings
37 atechanical facilities and equestrian centres
18994 hectares under crops including 24.5% farmed organically



136,378
pupils

37,440
students

45,717
apprentices

12,7 million
internship hours



91%
examination success rate

June 2021, all qualifications included from the agricultural certificate (CAP) up to BTSA.

RESEARCH & INNOVATION

France's farming world can also rely on a highly innovative research ecosystem that conducts practical trials with farmers in line with their expectations. A range of actors are mobilised in this way across a research-training-innovation-development continuum.

INRAE

A world leader
in research on farming,
food and the environment

11,00

sector professionals
across the whole
of France

267

research, experimentation
and service units



HIGHER AGRICULTURAL EDUCATION

11

public-sector and 6
private-sector establishments

933

teacher/researchers
and 629 doctoral candidates

109

research units, including
92 multi-purpose entities

ACTA ET ACTIA

Two networks covering the whole of France
that seek to accelerate applied research
and innovation transfer

3 200

researchers, engineers
and technicians,
more than 250 sites
in local regions

33

technical agricultural
and agro-industrial institutes



Agroecology:
second-year
agricultural science
students observing
the development
of natural enemies
in a field of broccoli
(Agrocampus
Ouest).

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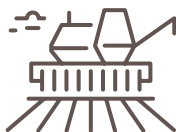
Agricultural production

At over 60 million tonnes, France is Europe's biggest producer and biggest exporter of cereals. Cereals account for one quarter of all French vegetable production in value. Half of all production is exported.

Major field crops

No.1 producer of wheat & maize

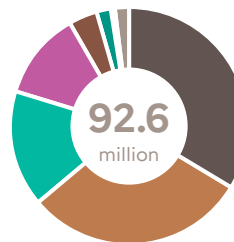
CEREALS,
MAJOR FIELD CROPS
In 2016



35%
of farmland
9 million hectares

87 hectares per holding
on average

MAJOR FIELD CROP
PRODUCTION
In millions of tonnes



	Soft wheat	29.2
	Sugar beet	26.2
	Maize	13.7
	Barley	10.4
	Rapeseed	3.3
	Sunflower	1.6
	Field peas	0.6
	Soybean	0.4
	Field beans	0.1

Organic wheat fields
in Eure (Normandie).
Xavier Remongin



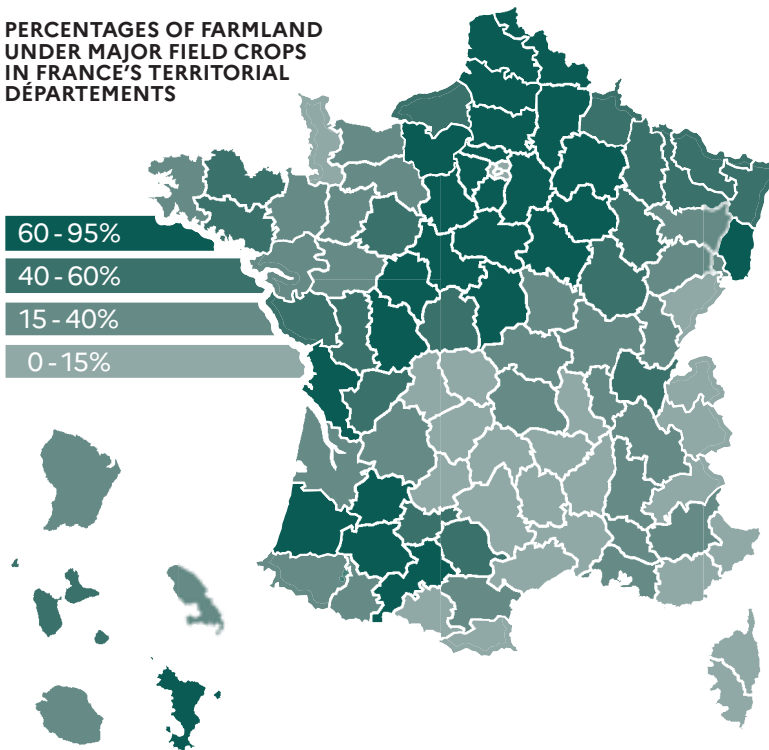
PERCENTAGES OF FARMLAND
UNDER MAJOR FIELD CROPS
IN FRANCE'S TERRITORIAL
DÉPARTEMENTS

60 - 95%

40 - 60%

15 - 40%

0 - 15%



MAIN CEREAL
CROPS

% of total area
under cereals

Soft wheat **48%**

Barley **22%**

Maize **19%**

TRADE

€ billions

Exports **6.8**

50% EU, 50% third countries

Balance of trade **+5.9**

PLANT PROTEINS

Plant proteins are used in both human food and animal feed in the form of oils, grain, flour, cake, etc. Among plants proteins, legumes play an important role in nutrition due to their high levels of protein and essential amino acids. They also have a major role in providing plant cover for the soil: their ability to fix atmospheric nitrogen enriches poor soils, facilitating the subsequent development of other crops. **This type of production has been identified as being among the most strategically important by the French government, which has a plan for doubling by 2030 the area devoted to these crops: to over 2 million hectares. Support for these crops is doubled in the forthcoming version of the CAP.**



106,643
holdings grow
plant protein crops



182,937
jobs

OILSEEDS

2.1 million hectares
5.4 million tonnes

PROTEIN CROPS

283,400 hectares
789,900 tonnes

DRIED PULSES

67,600 hectares
70,500 tonnes

FARMLAND AND PRODUCTION OF PLANT PROTEINS

'000s
hectares

'000s
tonnes

OILSEEDS

Rapeseed	1,111	3,297
Sunflower	775	1,607
Soybean	186	407
Other	48	74



PROTEIN CROPS

Field peas	202	629
Field beans	76	148
Sweet lupin	6	13



DRIED PULSES

Lentils	36	27
Dried peas	23	34
Dry beans	8	9



PRODUCTION
OF FEED CAKE
FOR LIVESTOCK

2.3
million
tonnes
of rapeseed
cake

551,318
tonnes
of sunflower
cake

FRENCH
CONSUMPTION



2.5kg of dried pulses
per capita per year

including 1 kg of lentils



11.8kg
of plant oils
per capita per year

including
4.9kg of sunflower oil
2.5kg of rapeseed oil



Farmer in a soybean
field in Loiret
(Centre-Val de Loire).

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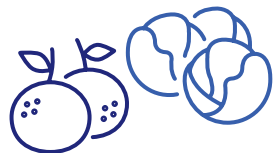
Fruit & vegetables

The fruit & vegetable sector is currently facing a major challenge, that of competitive performance. This means that experimentation and innovation must be watchwords when coping with the hazards of climate, health and economic crisis, in addition to changes in consumer behaviour. With several hundred different crops, France and its Overseas Territories have a highly diverse range of orchard, fruit and market gardening production, the main products, depending on the season, being apples, peaches and nectarines, plums and prunes where fruit is concerned, and potatoes, onions, tomatoes, sweetcorn and lettuce in the vegetable category.

No.4 producer
in Europe

LAND AREA USED
FOR FRUIT AND VEGETABLES

Metropolitan France



530,000
hectares



57,000 hectares
for fruits



42,000 hectares
for vegetables

15 million
tonnes produced



37,770

jobs

incl. **24,560** salaried posts



168,400 hectares
of orchard



18 PDOs

Protected Designations of Origin



23 PGIs

Protected Geographical Indications

FOREIGN
TRADE



Fruit

962,000 tonnes

€1.37 billion
in exports



Vegetables

1.09 million
tonnes

€1.17 billion
in exports



The fruit &
vegetable hall in
Rungis international
wholesale market.
©Xavier Remongin

Fruit











PRODUCTION

Metropolitan France

2.2
million tonnes

MAIN FRUIT CROPS

'000s of tonnes

	Table apples	1322
	Plums	189
	Peaches, nectarines	180
	Table pears	144
	Apricots	86
	Strawberries	55
	Table grapes	46
	Cherries	36
	Bananas (Overseas Terr.)	226
	Pineapples (Overseas Terr.)	28



Production
of tinned fruit,
jams and compotes
stands at

641,000
tonnes

Vegetables

PRODUCTION

Metropolitan France, including potatoes

13.0
million tonnes

MAIN VEGETABLE CROPS

'000s of tonnes

	Onions	702
	Tomatoes	643
	Carrots	543
	Sweetcorn	453
	Lettuce	354
	Green beans	340
	Peas	255
	Melons	254
	Cauliflower	235
	Cabbage	187



Production
of food potatoes
stands at
7 million
tonnes



1,1 million tonnes
of canned and **447,000**
deep-frozen vegetables



Artichokes
are Bretagne's
flagship crop.
© Pascal Xicluna

Winegrowing

Winegrowing stands apart in French agricultural production due to the strong symbolic value attached to wine as representative of France's gastronomy and lifestyle.

Every year 59,000 holdings produce an average of 47 million hectolitres of wine using grape varieties and production methods specific to each region.

Wines fall into three categories defined by EU regulations: wines not covered by any geographical indication, wines with protected geographical indications (PGI) and wines with protected designations of origin (PDO or AOC). Over half of total winegrowing area is devoted to this last category.



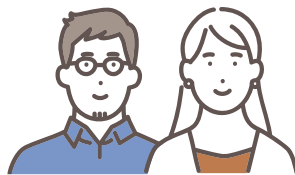
796,000
hectares of vineyard



4.69
billion litres



59,000
holdings



129,000
jobs
Incl. 79,000 salaried posts

FOREIGN
TRADE



1.3
billion litres
exported
€8.7 billion



No. 1 global producer
in value



245 million
bottles of
Champagne sold



14% of vines
are managed
organically



363 **PDO** wines
Protected Designation of Origin



74 **PGI** wines
Protected Geographical Indication



31% **HVE** wines
High Environmental Value



Avize, in Marne
(Grand Est), has a large
number of winegrowers
and numerous
Champagne houses.

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Livestock farming

Livestock farming is a major economic sector in France. The national herd is diverse and recognised worldwide for its numerous breeds and high quality. 50% of France's agricultural land is used to provide forage crops and pasture for livestock.



145,000
holdings are
livestock farms



37%
of all holdings

NUMBERS OF HOLDINGS AND EMPLOYMENT BY TYPE OF LIVESTOCK FARMING

Full Time Equivalents (FTE)

48,000 meat cattle **58,000** jobs
35,000 dairy cattle **76,000** jobs
8,000 mixed cattle **17,000** jobs
35,000 sheep, goats and other herbivores
19,000 pigs, poultry

ANIMAL PRODUCTION COVERED BY OFFICIAL QUALITY AND ORIGIN LABELS

In 2018



Over **130,000** tonnes
of meat is marketed under
labelling schemes

Prepared meats, pork, lamb, beef and veal
(Label Rouge, PDO/AOC, PGI)

226 Label Rouge
products in the
poultry/eggs sector

CONSUMPTION OF PRODUCTS OF ANIMAL ORIGIN

Per capita/per year



PIG MEAT

31kg



POULTRY

28kg



CHEESE

26kg



BEEF

22kg



EGGS

13kg



BUTTER

8kg



SHEEP &
GOAT MEAT

2kg



HONEY

0.7kg



A goat farm
producing organic
goat's cheese
in Drôme
(Auvergne-Rhône-Alpes).
©Xavier Remongin

Cattle



17.8
million head

PRODUCTION AND CONSUMPTION

1.7
million tonnes
produced

1.5
million tonnes
consumed



22kg
per capita



TRADE

In tonnes carcass equivalent

Imports..... **292,000**
Exports..... **474,000**

Poultry



157.6
million head

PRODUCTION AND CONSUMPTION

1.7
million tonnes
produced

1.9
million tonnes
consumed



28kg
per capita



TRADE

In tonnes carcass equivalent

Imports..... **646,000**
Exports..... **413,000**

10% of the
poultry sector was
operating under
official labelling
schemes in 2018.

Pigs



13.7
million head

PRODUCTION AND CONSUMPTION

2.3
million tonnes
produced

2.1
million tonnes
consumed

 **31kg**
per capita

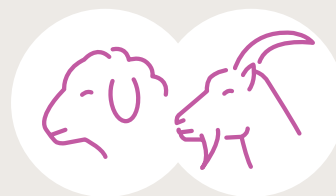


TRADE

In tonnes carcass equivalent

Imports..... **547,000**
Exports..... **701,000**

Sheep, goats



7,3 1,4
million head

PRODUCTION AND CONSUMPTION

Sheep meat

80,000
tonnes produced

155,000
tonnes
consumed

 **2,3 kg**
per capita



TRADE

Shhep, in tonnes carcass equivalent

Imports..... **80,300**
Exports..... **12,600**

Milk and dairy products

France also enjoys recognition for its high milk production capacity and its wide variety of cheese products. It is a country of 1,200 cheeses, of which more than fifty are covered by protected designations of origin. By fostering market differentiation, these designations help protect diversity, guaranteeing recognition for producers and contributing to the development of the individual identities of rural areas. In terms of value, cow's milk is the leading type of production. It is especially prominent in the west of the country and in mountain regions. As for goat farms, these produce 100,000 tonnes of cheese every year.

FRENCH DAIRY PRODUCTION



Cow's milk

24

billion litres

2nd EU highest production 



Goat's milk

508

million litres

28% of production 



Ewe's milk

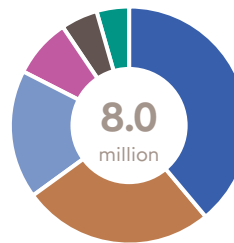
297

million litres

15% of production 

PRODUCTION OF DAIRY PRODUCTS

Tonnes



Packaged milk

3.2 million



Cheese

2.0 million



Yoghurt & fermented milk

1.4 million



Fresh milk-based desserts

681,000



Skimmed milk powder

382,000



Butter

354,000

The trade surplus for dairy products stands at



2.6

billion euros



France has 51 dairy PDOs

Protected Designations of Origin

1,200 varieties of cheese

CONSUMPTION OF DAIRY PRODUCTS

kg/per capita/per year



Milk

53kg



Cheese

26kg



Butter

8kg



Normandie's
Camembert (PDO)
is just one of
the 1,200 varieties
of French cheese.

©GettyImages

Horticulture

The French horticulture, floristry and landscaping sector is among those that provide the largest number of jobs in agriculture.

Approximately €2.7bn worth of plants are sold each year to the public; the other activities in the plant sector are conducted by marketing firms (wholesale and retail), landscape gardeners and landscape architects (annual revenue €11,3bn).

The sector is currently active in seeking to meet the expectations of consumers looking for plant products of all types, as well as users of plants that reconcile local regional resilience and the environment.



15,000
holdings
16,200 hectares



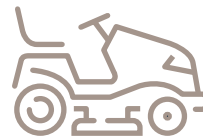
2,930
horticultural enterprises
& plant nurseries



16,580
jobs



21,050 distribution
and marketing
businesses



30,700 landscaping
businesses

Sales of ornamental plants,
fruit plants and woodland plants
represent turnover of

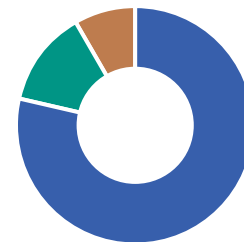


7
billion euros

FRENCH CONSUMPTION



2.7
billion euros



Outdoor
78%

Indoor
13%

Funeral
8%

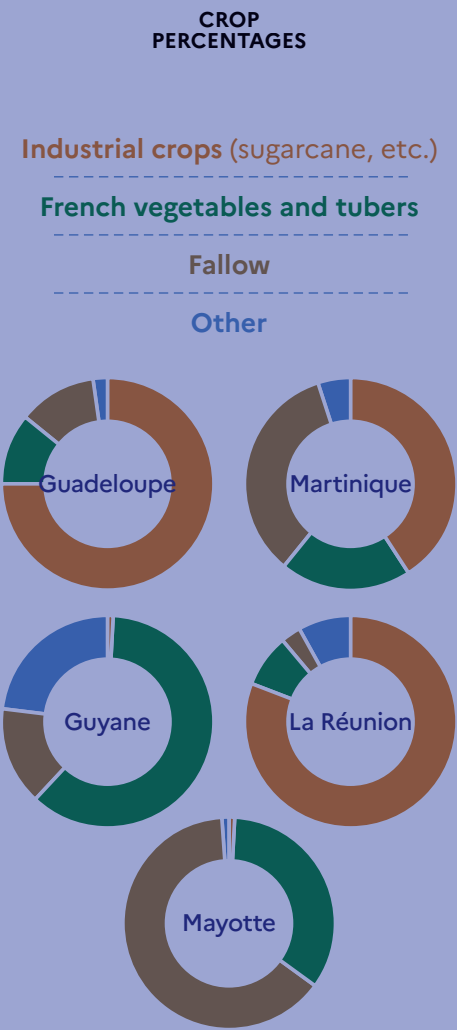
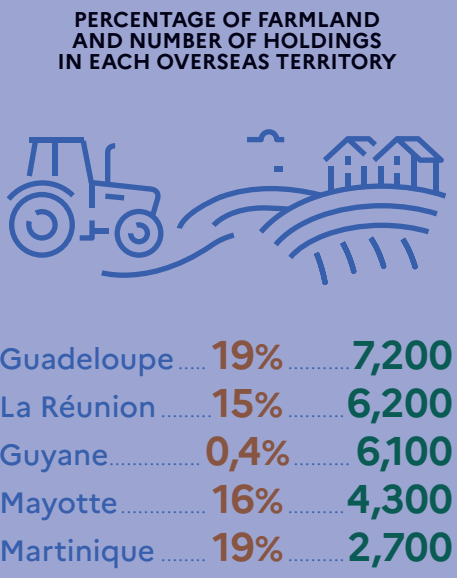
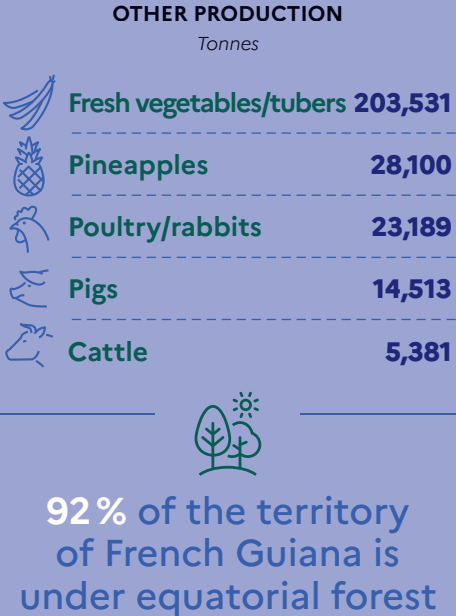


Potting *Impatiens*
plants at the Lycée horticole
de Montravel in Loire
(Auvergne-Rhône-Alpes).

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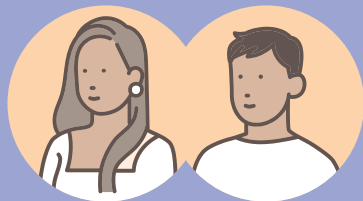
OVERSEAS PRODUCTION

Agricultural production in France’s overseas territories provides a large measure of diversification in the products offered on the market and for consumption in France and Europe. Bananas and sugarcane are historically important sectors, possessing high cultural value and major levels of technical skill acquired over many years of research and development. These export sectors are essential for the European Union, especially in the context of strong international competition for these products.



THE AGRIFOOD INDUSTRY

In 2019



7,700
jobs

including **50%** in La Réunion



2 billion euros
in revenue

including **7%** from exports



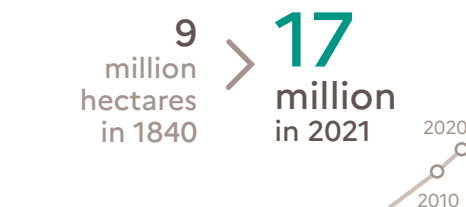
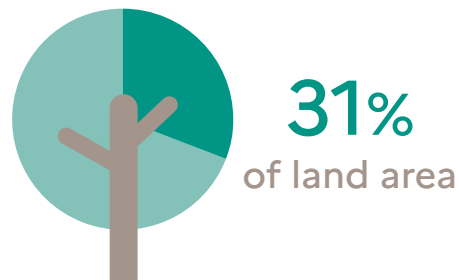
Lettuce production
in La Réunion.
©Pascal Xicluna

Forests

Metropolitan France's largely hardwood forests are highly diverse and offer biodiversity-rich natural habitats, with over 130 tree species, 70 species of mammal and 120 species of bird! The sustainable management of French woodland is protective of ecosystems, soils, water and biological diversity, aiming to ensure their productivity, ability to regenerate and protection against natural hazards both today and in the future.

Given that French forests may be the first to be affected by the effects of climate change, **the government is implementing a strong woodland renewal policy. The goal is to plant and maintain 130 million trees by 2030.**

WOODLAND Metropolitan France



72% hardwood



28% softwood
12% mixed

No.4 largest forest area

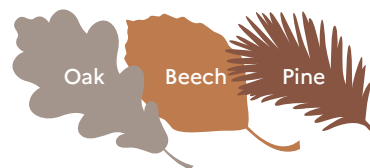


Sweden 17%
Finland 14%
Spain 11%
France 11%

FOREST RICH IN BIODIVERSITY

190
tree species

Main species:



Plus: spruce, fir, chestnut
hornbeam, ash, Douglas Fir, maple, poplar, etc.



French woodland is home to 73 species of mammal, 120 species of bird and 72% of the flora of Metropolitan France

FRENCH FORESTS OWNERSHIP

Metropolitan France

75% private owned

16% publicly owned
(by local authorities)

9% State-owned

FRENCH GUIANA: AN EXCEPTIONAL FOREST



A feature specific to France is that French Guiana's forest area is the EU's only area of tropical forest, covering 8 million hectares, or 92% of land area, offering exceptionally rich biodiversity, notably including 1,500 species of tree.



A woodland path
in Villarceaux
forest in Val-d'Oise
(Île-de-France).

©Pascal Xicluna

The wood industry

The forest-wood sector contributes to the mitigation of climate change by capturing and storing carbon in forests and wood products as well as by providing replacement materials and energy.

Whether providing timber for construction and industry or firewood, the sector is based around a renewable resource, generating over 390,000 direct jobs and 440,000 direct and indirect jobs, as well as €50bn in annual revenue.

It plays a key role in the context of the transition to a low-carbon economy.



37 million

cu.m. of harvested wood placed on the market



395,000
jobs



2,336 forestry businesses
1,308 sawmills

FRENCH WOOD PRODUCTION



Lumber for construction
18.6 million cu.m.
Logs for sawmills



Timber for industry
10.1 million cu.m.
posts, panels, papermaking pulp



Firewood
8.4 million cu.m.
heating and charcoal

ECONOMIC ACTIVITY LINKED TO WOOD CONSTRUCTION



1,978
firms

€1.93 billion
in annual revenue



28,000
jobs



Construction
of a new livestock
building and milking
parlour in wood
and concrete at
the Lycée agricole
Le Valentin in Drôme
(Auvergne-Rhône-Alpes).

©Xavier Remongin

Fisheries and aquaculture

France has one of the bigger fishing fleets in the European Union. It accounts for 8% of its total fleet and 16% of its total capacity. The fishing industry has been controlled since 1983 by the rules of the EU's Common Fisheries Policy (CFP), which lays down a set of regulatory provisions whose purpose is to manage the European fishing fleet and preserve fish stocks.

The fisheries industry, working through 65 national ports, and aquaculture together play a major role in regional development and jobs in France. These sectors are strongly committed to a sustainable development model.



6,251
fishing vessels

In 2019



13,120
jobs
4,470 in Metropolitan France
3,566 Overseas

SALES: QUANTITY AND VALUE
In 2019

527,000 tonnes
1.2 billion euros

Fresh and deep-frozen fish. Total sales from French vessels: sales at fish auction, direct sales, sales to the processing industry and sales for export.



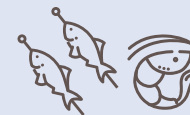
2,820
aquaculture
businesses

2,280 in shellfish farming
540 in fish farming, incl.:
180 in pond-based pisciculture

19,100
jobs
16,300 in shellfish farming
2,800 in marine pisciculture

SALES: QUANTITY AND VALUE
In 2019

193,000 tonnes
148,000 for shellfish farming
45,000 for fish farming
€769,000
542,000 in shellfish farming
227,000 in fish farming



On average,
the French consume
33.5 kg of fisheries
and aquaculture products

MOST-SOLD FISHERIES PRODUCTS

*Quantities sold in 2020, species as declared
by French fishing vessels*

Scallops

Sardines

Hake

Monkfish

Mackerel

MOST-SOLD FRENCH AQUACULTURE PRODUCTS

Quantities sold in 2020 in Metropolitan France



Oysters **49%**



Mussels **34%**



Trout, salmon **18%**

**MARKETING
AND PROCESSING**

In 2018

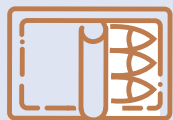


4,457

fish retail outlets

278

fish wholesalers



217

fish processing
businesses

4.4

billion euros
in revenue



Mediterranean
fishermen
in Marseille
(Provence-Alpes-
Côte d'Azur).
©Stéphanie Tétu

Official quality and origin labels

The diversity of France's local producing regions, which have been shaped by centuries-long traditions, has led to agricultural and food practices that are both unique and valued worldwide. Geographical indications were created to protect this exceptional situation: such indications acknowledge the close link between the product, its local region and human expertise. Protected Designations of Origin (PDO) and Protected Geographical Indications (PGI) guarantee that the product's origin provides it with specific quality characteristics and seek to prevent the illicit use of product names and deception of consumers.



One farm in every three is operating under an official scheme for identification of product quality and origin



Such labels identify over **1,183 products** in France

PERCENTAGES OF FARMS PRODUCING UNDER ONE OR MORE QUALITY LABELS

Not including organic farming

Winegrowing	93%
Fruit/permanent crops	33%
Pigs/poultry	29%
Dairy cattle	24%
Mixed crops/Mixed livestock	23%
Meat cattle	19%



Protected Designations of Origin (PDO) identify products for which all production stages are conducted using acknowledged expertise within the same geographical area, providing such products with their unique characteristics. It is a EU scheme that protects the name of the product throughout the European Union. The French **Appellation d'Origine Contrôlée (AOC)** is a stage in the process towards the PDO.

469 AOC/PDOs agrifood products
2 AOCs for forest products
17 AOCs for spirits



Protected Geographical Indications (PGI) identify agricultural products, processed or unprocessed, whose quality, reputation or other characteristics are linked to their geographical origin.

146 PGIs are registered in France
74 wines, 35 spirits, 2 ciders



Traditional Speciality Guaranteed (TSG) identifies products whose specific characteristics and quality are linked to a composition or to production and processing methods based on tradition.

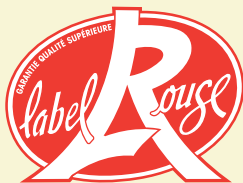
2 TSGs in France:
Berthoud, a Savoy cheese recipe
and "Bouchot" mussels



Organic farming is a type of production that combines optimum environmental practice with protection of biodiversity and natural resources, as well as guaranteeing a high level of animal welfare.

53,255 producers

2.5 million hectares are farmed organically, representing **9,5% of agricultural land**



The **Label Rouge** is a French national labelling scheme to identify products that due to their methods of production or manufacture offer a higher level of quality than other similar products generally found on the market.

434 Label Rouge products
(mainly poultry/eggs: 226)



PDO Golden apples
in Limousin
(Nouvelle-Aquitaine).

© Cheick Saidou

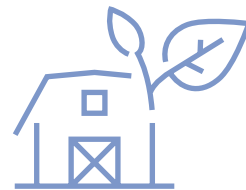
Organic farming

In France, the organic approach to production and processing is included among official labelling schemes identifying product quality and origin.

It has been controlled under EU regulations since 1991 and it aims to protect the environment, biodiversity and animal welfare.

Only products from organic farming can bear the EU "bio" logo or the French "AB" label.

Organic farming is central to sustainable development. It is a major source of employment and helps generate value-added for the economic and social life of local regions: it constitutes a commitment to future generations.



53,255

holdings have adopted organic farming methods



2.5

million hectares

x2 since 2017

9.5% of agricultural land

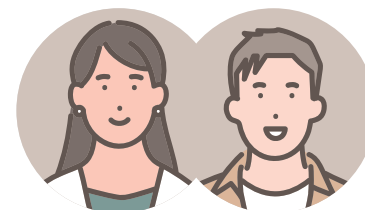
The largest area 

12%

of holdings in 2020
up from 4% in 2010



in 10 years



200,544
direct jobs

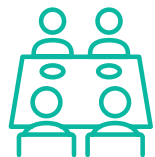
Production, processing, commerce, services



Consumption of organic products is worth

13.2 billion euros

- 31% groceries
- 17% fresh fruit & vegetables
- 15% dairy products
- 9% meat
- 9% alcoholic beverages
- 8% bakery goods
- 7% sea, catering, frozen foods
- 4% non-alcoholic beverages



In institutional catering, legislation requires 50% of products to be of high quality and sustainable, incl. **20%** organic



Organic tomato
harvesting
in Maine-et-Loire
(Pays de la Loire).

©Pascal Xicluna

High Environmental Value

The French High Environmental Value certificate (HVE) is awarded by the Ministry of Agriculture and Food Sovereignty.

The certificate represents the third, and highest, level of environmental certification for agricultural holdings. It reflects a voluntarily adopted approach available to all sectors and organised around four environmental themes:

protection of biodiversity, reduced use of plant protection products, controlled fertiliser use and water resource management.

The HVE certificate has been operational since 2015, and is already held by over 25,000 holdings, or 7% of the total. It has a strong presence in the winegrowing sector: almost 23% of winegrowers are HVE certified.












25,500
holdings are certified
as having High
Environmental Value

7%
of all holdings

x20
in 3 years

NUMBERS OF HOLDINGS CERTIFIED FOR HIGH ENVIRONMENTAL VALUE IN EACH SECTOR

In 2021

	Winegrowing	14,721
	Major field crops	1,997
	Arboriculture	1,346
	Market gardening	701
	Cattle farming – meat	696
	Cattle farming – dairy	206
	Sheep	122
	Poultry	62
	Horticulture	55
	Other plant crops	158
	Other animal production	97

FRENCH AGRITECH

In France, FoodTech and AgriTech are rapidly expanding and evolving sectors comprising both firmly established businesses generating employment and new start-ups which are constantly emerging.

Although these sectors could point to no more than a dozen initiatives ten years ago, today they have over 215 start-ups and referenced firms. This figure makes France, per capita, the third-ranking country in the world for AgriTech start-ups.

215

start-ups and
referenced businesses
in the AgriTech
or FoodTech fields

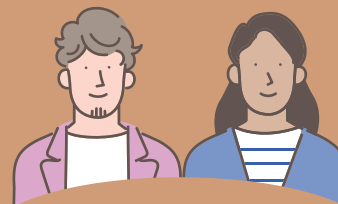


7 are in the
FrenchTech120 listing
2 are members of NEXT40

Working on the foundation provided by the quality and strength of agriculture in France, the EU's leading agricultural nation, FoodTech and AgriTech are sources of practical and innovative solutions that create value and are profoundly useful for the entire food chain from producer to consumer. For those turning to these innovative sectors, they also offer a choice of professions passionately devoted to the values of the farming world and engaged with all the complexity of the living world.

No.1 country
for capital raising

Ranked **5th** worldwide
€562 million
in capital raised in 2020



12,000
agricultural engineers
graduate every year



AgroParisTech,
Paris-Saclay University
in **13th** among universities
in the Shanghai ranking

FARMERS AND THE NEW TECHNOLOGIES



81%
use the Internet
on a daily
basis in
their work



85%
use smartphone
applications
and social media
to share
and improve
their activities



3/4
have at least
one item of
robotic equipment
50%
use a GPS
to improve the
precision of their
farming activities

The agrifood industry

Agrifood is France's leading industrial sector. Agrifood companies employ nearly half a million people and process 70% of all French agricultural production. The French agrifood sector can point to a positive balance of external trade. It is among the sectors that contribute most to French exports in value terms alongside aircraft construction, chemicals, perfumery and cosmetics.

Innovation is central to the farming and agrifood sectors. Not only does this promote development, the attractiveness of jobs and competitive performance, but it fosters the emergence of innovative products that give consumers what they want.

The agrifood sector has engaged fully with the digital transition, which is of major importance for the satisfaction of consumer demands.

The deep regional roots of French agrifood companies underpin the French agricultural model and provide jobs across the country, particularly in rural areas. These firms add value to quality and origin labelling schemes and foster local supply for institutional catering.

THE AGRIFOOD INDUSTRY

In 2018



15,479
companies

Including beverage production



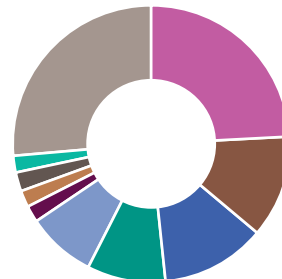
198
billion euros
in annual revenue



433,579
jobs

THE DIVERSITY OF AGRIFOOD BUSINESSES

% per sector of activity



- 24% Beverages
- 12% Meat processing
- 12% Bakery products and pasta
- 9% Fruit & vegetable processing
- 8% Dairy products
- 2% Plant and animal oils and fats
- 2% Cereals and starch products
- 2% Animal feed
- 2% Processing of fish and products of the sea
- 26% Other food products



38,971

self-employed
craft professionals

14 billion euros
in annual revenue

140,915
jobs



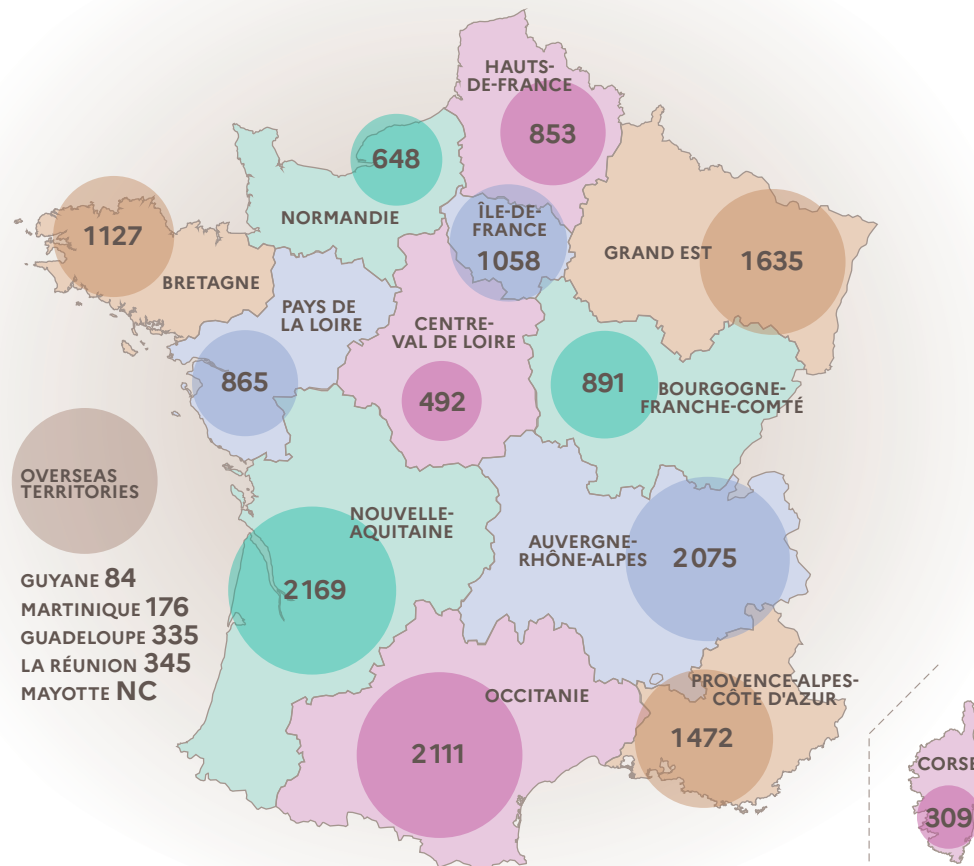
22,620
wholesalers

153 billion euros
in annual revenue

180,436
jobs

AGRIFOOD PRESENCE ACROSS FRANCE'S REGIONS

Numbers of legal entities



Craft production
of organic hazelnut
chocolate spread
in Corse.

© Xavier Remongin

France's trade

France is a major actor in global agricultural and agrifood trade, contributing to global food security. France ranks 6th among world exporters of agricultural and agrifood products and is the 4th biggest exporter of processed agrifood products.

The agricultural and agrifood sector generates the third largest trade surplus for France, between €6bn and €7bn. A little over half of France's exports go to the European Union (two-thirds before Brexit) and a little under half is exported to more distant markets.



6th

ranking global exporter of agrifood products

AGRIFOOD TRADE



€61,6 billion in exports

€55,7 billion in imports

FRANCE'S MAIN CUSTOMERS



Germany



Belgium



UK



Italy

MAIN SUPPLIERS



Spain



Belgium



Netherlands



Germany

PRINCIPAL EXPORTS € billions



Beverages, wines & spirits

15.2



Cereals

6.8



Milk & dairy products

6.3



Cereal-based preparations

4.2



Meat and offal

3.0



Residues and feed for livestock

3.0

PRINCIPAL IMPORTS € billions



Meat and offal

3.9



Fruit

5.5



Fish & crustaceans

4.3



Milk & dairy products

3.7



Beverages, wines & spirits

3.9



Preparations based on vegetables/fruit

3.6



Loading
a container ship
at Jarry port
in Guadeloupe.

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Conclusion

Agriculture is central to the French sense of identity. Standing at the interface between economic, social and environmental issues, it has shown resilience and has constantly adapted to meet consumer needs in order to address the challenge of climate change and maintain its competitiveness.

Its strength stems from that of the 759,000 men and women in farming who shape French agriculture, creating a model that is recognised and saluted worldwide.

2020 statistics
unless otherwise indicated.

Sources :

Agreste Graph'agri 2021 /
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(SSP) at the Ministry of Agriculture and Food
Sovereignty.

With the following exceptions:

P. 4 – INSEE

P. 12 – Direction générale de l'enseignement
et de la recherche (DGER) at the Ministry
of Agriculture and Food Sovereignty

P. 30 – FranceAgriMer / *Chiffres-clés
de l'horticulture ornementale 2019-2020*

P. 36 – Direction générale de la performance
économique et environnementale
des entreprises (DGPE) at the Ministry
of Agriculture and Food Sovereignty

P. 38 – FranceAgriMer / *Chiffres-clés
des filières pêche et aquaculture
en France en 2021*

P. 40 – Institut national de l'origine
et de la qualité (INAO)

P. 42 – Agence Bio

P. 46 – DGPE / *Panorama des industries
agroalimentaires 2021*

—

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(DICOM) at the Ministry of Agriculture
and Food Sovereignty – January 2022



Harvesting Melrose
apples in Savoie,
(Auvergne-Rhône-Alpes).
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Heifers in Oise
(Hauts-de-France).
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