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Agence BIO Press Kit

Consumption and perception barometer of organic products in France
Agence BIO/Spirit Insight
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Study conducted online, via an access panel, from the 23rd of November until the 7th of December 2018, on a representative national sample of 2,000 French citizens aged 18 and over, chosen using the quota method.

For further information, please visit www.agencebio.org

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ORGANIC PRODUCE AND YOUNG CONSUMERS

1- THE NEW TYPES OF ORGANIC CONSUMERS

For the 2018 consumption and perception barometer of organic produce in France, SPIRIT INSIGHT identified 7 main French groups, classified in terms of their perception of organic food.

Group 1- young irregular consumers
11% of French citizens, particularly the 18-24 (16%) and 25-34 (22%) age groups, who did not consume organic products regularly.

Group 2– budget-conscious single households (15%)
Neither consumers nor buyers, they tended to limit their spending.

Group 3 – early adopters (14%)
Typically persons aged 50 and over with strong family traditions.

Group 4 – recently converted young families
14% of French citizens with young children, aged 18-24 (16%) or 25-34 (22%), who were budget-conscious and had recently converted to organic produce.

Group 5 – sceptical consumers (13%)
The majority of whom were non-consumers of organic produce. A high percentage of those who consumed organic produce were new consumers.

Group 6 – savvy consumers (14%)
Typically hedonistic, they appreciated high-quality food and traditional culinary values.

Group 7 – organic ambassadors (19%)
Mainly older consumers who had been purchasing organic for years, although they sometimes struggled to find products that met their needs.

Younger organic consumers mainly fell into the following three categories: young irregular consumers, recently converted young families, and sceptical consumers. The common denominator of these categories was that they had all tried organic produce.

2- THE NEW GENERATION OF YOUNG CONSUMERS

2018 witnessed a strong increase in the percentage of new regular consumers, i.e. persons who had consumed organic products at least once per month in the past year: +17% vs. +9% in 2017.

These "new" consumers are typically **aged 18-24 (27%),** with a low socio-economic status (20%), unemployed (19%) and female (19%).

3- YOUNG CONSUMERS' PERCEPTIONS OF ORGANIC PRODUCTS

If we look at the reasons why this generation consumes organic products compared with older generations, two factors stand out:

- Animal welfare: 37% vs 28% of the overall sample
- Ethics: 32% vs 25% of the overall sample

Why do they not consume -more organic produce? Beyond the price (84%), **more irregular consumption by 18-24 year-olds is mainly due to lack of habit (53%).**

Young consumers do not perceive prices in the same way as older generations. **Only 47% of 18-24 year-olds expect to pay more for organic than non-organic produce.**

However, despite the fact that they do not habitually purchase it, they nevertheless have a good knowledge of organic produce: 96% of 18-24 year-olds were familiar with the AB (agriculture biologique) logo while 70% of 18-24 year-olds and 67% of 25-34 year-olds recognised the EU organic logo, compared with 59% of French citizens overall. For this generation, their network was their main source of information, either family and friends (45% vs. 36% for all French citizens) or social media (41% vs. 22% overall).

This generation had relatively high consumer trust in organic products and related information. Once again, 18-24 year-olds differed from previous generations, giving a score of:

- 6.4/10 with regard to consumer trust in organic product information, a higher score compared with the overall sample (6.1/10).
- The image of organic products sold in supermarkets was rated 6.3/10 by 18-24 year-olds, compared with an average overall rating of 5.9/10.

Like the older generations, young consumers typically purchased organic food from supermarkets. Meanwhile, 7% of consumers purchased via click and collect services and online sales. 18-24 year-olds (14%), and 25-34 year-olds (12%) were the two main age groups that used click and collect services. Online purchases were typically made by under 35 year-olds (over 20%).

Inherently aware of the importance of organic produce, 18-24 year-olds expressed an interest in alternative consumption, with an ethical, responsible, sustainable focus, particularly in terms of product value. 27% of young consumers planned to increase their organic consumption within the next 6 months.

While they trusted organic farming and knew how to identify organic produce, they still did not instinctively purchase organic products… perhaps since, like older generations, they lacked information, particularly about organic regulations (31%) and inspections (31%).

THE IMPORTANCE OF EDUCATING PEOPLE ABOUT ORGANIC PRODUCE

1- French citizens have a good knowledge of organic farming

Unsurprisingly, the majority (97%) of French citizens were familiar with the AB logo, -– a percentage that has remained stable over the past few years.
The same is true for the **European logo**. After 3 years of significant progress, the number of French citizens who were able to recognise the European logo had now levelled out at 59%.
When asked to compare these two logos, 2/3 of French citizens believed that the quality of organic products was the same, regardless of the logo. Nevertheless, organic consumers were the most likely to believe that **the AB logo identifies higher quality products compared to the European logo (34% vs 30% overall).**

As well as being able to recognise organic logos, French citizens continued to have a positive perception of organic production methods:

- Nearly 9 out of 10 French citizens understand how organic farming helps protect the environment (87% compared with 91% in 2017) and promoted biodiversity (83%).
- The naturalness of organic products (made without the use of synthetic chemicals), as well as their health benefits were widely acknowledged (84% and 83%, respectively), particularly among consumers with a high socio-economic status.
- The results also indicated that French citizens had a good understanding of annual organic inspections in France (76%), including those carried out on imported products (73%).

However, the perception of the nutritional benefits of consuming organic products had significantly declined among French citizens, despite recent studies highlighting the advantages.

2- Consumer expectations with regard to transparency and inspections

Aware of the importance of educating citizens and providing transparency, Agence BIO aimed to go even further this year in terms of raising French citizens' perception and knowledge of AB specifications. French citizens were asked several questions on this topic, with a focus on issues often covered in the media. The results were clear:

- Over half of French citizens believed that organic farming specifications have become more stringent over the past five years (53%).
- Only a third of the French population are aware of the use of natural active substances in organic farming.
- An increasing number of French citizens are aware of the presence of pesticide residues detected during organic product inspections:
  56% of consumers interviewed were aware of this, including 61% of those aged 65 and over with a high socio-economic status.

3- Organic product information promotes consumer trust

Overall, French citizens confirmed that **points-of-sale provide sufficient information on** organic produce (58%), including **the health and environmental benefits of organic farming** (52 % and 48%, respectively), **and product origins** (44%).
Nevertheless, they considered that the quality of information concerning organic farming legislation (31%) and product inspections (31%) had declined.

CONSUMER INDICATORS CONFIRM GROWING INTEREST IN ORGANIC PRODUCTS

1- THE NUMBER OF ORGANIC CONSUMERS IS ON THE RISE

In 2018, nearly **9 out of 10 French citizens** (88%) stated they had consumed organic products. This very high score has, for the first time in 4 years, some negative nuances: **a decline** in the number of **regular organic consumers** and an **increase in the number of organic non-consumers**.

Here are the results in detail:

- The percentage of "daily" organic consumers had decreased by 4%
  i.e. 12% compared with 16% in 2017.
- The percentage of organic non-consumers had increased to 12%
  from 8% in 2017. Nearly 1 in 5 French citizens stated that they did not purchase organic products, the lowest percentage recorded since 2015. Organic non-consumers or those who purchase organic produce less than once a month typically had a low socio-economic status and lived in the Normandy (66%) and Hauts-de-France (61%) regions.

- The percentage of regular organic consumers, i.e. at least once a month, remained relatively stable, at 71%
  (vs. 73% in 2017). It should be noted that a large majority of regular organic consumers had a high socio-economic status (78%) and lived in the Ile-de-France region (77%).

2- CONSUMER BUDGETS DEVOTED TO ORGANIC PRODUCE HAVE LEVELLED OFF FOR HALF OF FRENCH CITIZENS

After 3 consecutive years of significant increases in the share of consumer budgets devoted to organic produce, the figures had begun to level off: over half of French consumers (54%) claimed that their organic food budgets had remained more or less the same over the past 12 months, with no significant difference recorded among the population.
The majority of French citizens with a high socio-economic status had increased their organic food budgets. In contrast, consumers with a low socio-economic status estimated that it had decreased.

This year, just over a third of French citizens (34%) considered it was reasonable to pay more for organic than non-organic produce, compared with 41% in 2017. The figures were markedly higher among organic consumers (40%) and those with a high socio-economic status (41%).

3- STRONG CONSUMER DEMAND IN CATERING OUTLETS AND SUPERMARKETS

French consumer demand for organic produce in these outlets remains high, with almost identical results compared to 2018.
On average, 7 out of 10 French citizens were interested in catering outlets offering organic products. Consumer demand for organic products was highest with regard to school canteens, with 85% of French households with children interested in school meals, particularly those living in the Ile-de-France region. Next on the list were restaurants (78%), hospitals (76%), and retirement homes (74%).

Unsurprisingly, supermarkets are an essential point-of-sale for organic products: 7 out of 10 organic consumers would like to see more organic products available in supermarkets.

Other points-of-sale where consumers would like to see a wider range of organic products included:

- artisanal stores (49%), particularly the case among 50-64 year-olds (57%) and those living in the Occitanie region (59%)
- markets (47%), again, particularly the case among older consumers (58%) and those living in the Occitanie region (59%)
- convenience stores (37%)
- farms (27%)
- Online grocery shopping and click and collect services (16% and 15%, respectively)

While most French consumers would like to see more organic products available in supermarkets (81%), they had rather mixed opinions with regard to organic produce sold under supermarket own-brands, which ranked only 5.9/10. Organic consumers had a slightly more confidence in supermarket own-brands, which they scored 6.3/10.

The emergence of organic products sold under French national brands was welcomed by all French organic consumers.

Whether they are sold under national brands or distributor's own brands, purchased in supermarkets, or in other distribution channels, French citizens continue to purchase the same types of organic products.

4- The most popular organic products

The results concerning the categories of organic products consumed had remain relatively stable since 2015:

- Fruit and vegetables at 78%, have remained the most popular organic products since 2015 (83% among respondents with a high socio-economic status). Fresh fruit and vegetables are undoubtedly the most popular organic products.
- Next up, dairy products (71%) including **milk** (44%) and **cheese** (43%). This is the only category to experience strong growth (+7 points)
- Organic eggs are also very popular, witnessing more or less stable growth since 2015 (65%).
  They are most popular among women (68%) and over-65s (74%)
- Half of French citizens consume at least one organic grocery product, including pasta, rice, and cereals (34%), other grocery products (25%), and oils (24%).
- 48% consume at least one organic beverage, including fruit juice (39%), wine (19%), and other drinks (5%).
- 4 out of 10 French citizens stated that they purchased organic meat and poultry, with poultry remaining the most popular (32%), followed by beef and veal (26%), and lastly, pork, delicatessen meats, and lamb (20%). Apart from poultry, organic meat is most popular among men and older generations.
- One in three French citizens consume organic bread. This product could experience stronger consumer growth if it were more widely available in artisan bakeries.
- Coffee, tea, and herbal teas / breakfast biscuits / soy-based products have declined in popularity since 2016, although their results were still respectable (from 27% to 20%)
- To a lesser extent, consumers also purchased organic**:**
  Fish, shellfish, seafood (13%) and dietary supplements (9%).
- A new product category was introduced in 2018: organic ready meals (7%).
  This figure may be correlated with an underdeveloped yet dynamic product range.

In 2018, organic product trends were marked by stagnation in regular consumers (who consume organic products at least once a month), a decline in daily consumers, and the arrival of new consumers, particularly the 'Z' generation. However often they consume them, the average organic consumer typically purchases well-established organic products, reflecting average household purchases, and mostly shop in supermarkets. Meanwhile, consumer demand for organic produce in out-of-home catering remains very high, particularly in school canteens, which was a key news topic in the last quarter of 2018. Consumer demand for organic products is linked to significant changes in French citizens' eating habits.

ORGANIC FOOD IS NO LONGER A FAD – IT IS A WAY OF LIFE

1- A RISE IN THE CONSUMPTION OF ORGANIC "NON-FOOD" ITEMS

More than simply a fad, organic products have become a deep-rooted trend. Alongside food, French citizens are consuming an increasing number of organic non-food items. Consumer demand in this category has continued to rise since 2015, with strong growth recorded this year in organic domestic cleaning products (61%) and health and beauty products (57%).
This trend reflects the growing desire of French citizens to consume more responsibly.

2- THE DESIRE TO CONSUME MORE RESPONSIBLY

For many French citizens, consuming more responsibly went hand in hand with changing their eating and cooking habits (57%). This was particularly the case among women (61%). Notable changes included:

- Avoiding waste: the main change adopted by those interviewed (61%)
- Consuming seasonal produce (58%), including fresh and local products (55% and 52%, respectively)
- Cooking more (45%), including making home-cooked meals (46%)
- Reducing plastic and packaging (41%)
- Reading fresh product labels: looking at product origins and ingredients: a new consumer habit adopted by ¾ of French citizens.

This eco-friendly approach with regard to consumer purchasing and consumption patterns is increasing year on year.

3- A PREFERENCE FOR LOCAL AND ARTISANAL PRODUCTS

Organic consumers would like to see more organic food products available in artisanal stores (49%) including bakeries (78%) and greengrocers (74%). Purchasing local products is making a strong comeback.

WHY EAT ORGANIC?

Almost all French consumers mainly focused on the **better flavour of organic products**, which was the decisive factor in their purchasing decisions (95% identified this as a major factor, including 59% who considered it to be a very important factor).
French consumers also preferred to purchase **products made in France, locally if possible**: nearly 9 out of 10 French citizens considered this a decisive factor, alongside price.
In contrast, the least important criteria included product brands (only 10% considered this very important) and practicality i.e. ready-to-use products (13%).