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France

Retail Food Sector

Annual

2006

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Report Highlights:
Total food sales in France increased by 1.3% in 2005 with food and beverage expenditures representing 14% of French consumers' household budgets. Food retail outlets generally are comprised of hyper/supermarkets, hard discounters, city center and department stores and traditional outlets. E-commerce is beginning to show some growth. Frozen food sales climbed 6% in 2005.

The following products show strong prospects: fish and seafood; tropical fruits and nuts; beverages, including wines and spirits; innovative diet, health, and organic foods; and any prepared foods, especially ethnic or regional foods with an American image, such as Alaska seafood, Louisiana, California and Tex-Mex.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Paris [FR1]
[FR]

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Average exchange rate used in this report, unless otherwise specified:
Calendar Year 2002: US Dollar 1 = 1.05 Euros
Calendar Year 2003: US Dollar 1 =1.13 Euros
Calendar Year 2004: US Dollar 1 = 0.806 Euros
Calendar Year 2005: US Dollar 1 = 0.8038 Euros

EXECUTIVE SUMMARY

SECTION I. MARKET SUMMARY

With its highly developed food sector, France is the European Union's most competitive producer, processor and exporter of agricultural and other food products. In 2005, France's top suppliers of food and agricultural products were the Netherlands, Belgium/Luxemburg, Germany, Spain, the United Kingdom and Italy with 70 percent total imports. Outside of the EU, Brazil is the largest supplier to France, mainly of bulk products, including soy and soy protein, orange juice and orange juice concentrates.

Total food sales in France increased by 1.3 percent in 2005. Over the last five years, average French consumption has increased slightly for fresh fruits and vegetables, dairy products (mainly yogurts), and mineral water. On the other hand, consumption of milk, cheese, and wine decreased, while consumption of meat, poultry and seafood remained constant.

In 2005, food and beverage expenditures represented 14 percent of the total French household budget, for a total value of $182.7 billion, up from $178.8 billion in 2004. The following sectors have shown strong growth trends since 2002: non-alcoholic drinks, fish and seafood, dairy products, breads and cereals and fruits and vegetables.

Total French Household Food and Beverage Expenditures, by major categories:

In U.S.$ billion

	2002	2003	2004	2005	Evol. 2002/2005
Bread and cereals	15.8	14.9	22.1	22.4	+41.8
Meat	34.0	31.9	43.2	44.5	+30.9
Fish & seafood	8.4	8.0	12.5	12.8	+42.8
Milk, cheese, eggs	16.1	15.2	22.6	22.9	+42.2
Fruits & vegetables	19.6	18.2	26.5	27.6	+40.8
Non alcoholic drinks	7.9	8.0	11.9	12.6	+59.5
Alcoholic drinks	12.7	11.9	17.7	17.5	+37.8

Source: INSEE PREMIERE - Household Consumption

French imports of agricultural and food products have continued to follow an upward trend moving from $17.1 billion in 2001 to $39.3 billion in 2005 (includes tobacco). Imports from the United States made up 1.9 percent of total French imports in 2005 continuing a steady growth pattern, rising from $570 million in 2001 to $730 million in 2005. (Source: GTI World Trade Atlas/French Customs)

The table below details 2005 imports of U.S. food and beverage products by major categories

Over U.S.$ 15 million	Between U.S.$ 3 to 15 million
Stone fruit, tropical fruit and citrus Oilseeds, misc. grains, seeds, including soybeans	Strawberries Dried fruits (including tree nuts) Peanuts

Fish and seafood Animal feeds Cereals, including rice and corn Meat and offals, including horse meat Spirits Beverages Dried vegetables Fruit juices Tobacco and tobacco products	Canned vegetables Canned fruits Canned fish Sauces Biscuits

Source: GTI World Trade Atlas/French Customs

Major French Imports of Agricultural and Food Products, Total and from U.S. for Calendar Years 2001-2005 (in million U.S.$)

	2001		2002		2003		2004		2005	
In U.S. $ million	**Total**	**USA**	**Total**	**USA**	**Total**	**USA**	**Total**	**USA**	**Total**	**USA**
Animal (incl. marine) products										
Meat and offal	2,228	**21.3**	2,138	**13.9**	2,290	**15.3**	3,631	**29.3**	3,903	**44.5**
Fish and seafood	2,228	**65**	2,125	**118.9**	2,270	**103.5**	3,274	**160.9**	3,577	**186.1**
Milk products, including eggs	1,809	**6.9**	1,638	**4.2**	1,746	**4,8**	2,577	**8.4**	2,431	**2.5**
Vegetables products										
Vegetables	1,340	**18.4**	1,435	**15.5**	1,597	**18.2**	2,252	**17.6**	2,347	**19.5**
Fruit	2,047	**79**	2,071	**99.4**	2,393	**103.5**	3,516	**160.4**	3,411	**207.7**
Coffee, tea, spices	714	**0.2**	689	**0.1**	652	**0.9**	831	**1.2**	972	**0.7**
Rice	-	**19.8**	186	**14**	212	**10.1**	311	**15**	272	**12.6**
Corn	-	**15.7**	-	-	111	**31.8**	203	**45.4**	148	**32.6**
Animal and vegetable fats	0,801	-	0,913	**4.3**	950	**16,5**	1,357	**5.6**	1,539	**5.9**
Food industry products/Canned and dry grocery products										
Canned and prepared meat and fish	804	**3.2**	853	**4.3**	888	**2.5**	1,296	**3.5**	1,300	**4.7**
Sugar and sweet foods	483	**1.1**	527	**3.5**	841	**0.1**	1,098	**0.3**	1,066	**0.4**
Cocoa based foods	1,085	**0.5**	1,311	**0.9**	867	**0.3**	1,271	**0.1**	1,135	**0.1**
Cereal based foods	1,189	**3.3**	1,400	**3.1**	180	**1.6**	278	**3.5**	290	**8.6**
Canned fruits, jams and pureed fruits	322	**15.3**	414	**16.3**	453	**15.7**	706	**35.8**	723	**35.8**
Canned vegetables	348	**1.9**	275	**1.1**	444	**2.2**	695	**1.2**	713	**0.1**
Fruit juices	-	**28.9**	477	**28.8**	557	**28.7**	738	**25.5**	734	**22.3**
Other prepared foods	763	**12.4**	848	**17.3**	417	**14.3**	600	**14.5**	626	**10.3**
Mustards & sauces	-	**4.7**	185	**3.3**	207	**3.4**	298	**4.2**	322	**4.3**
Beverages, including alcohols	864	**39.6**	1,559	**49.6**	1,666	**42.3**	2,559	**61**	2,610	**64.7**
Wines & Spirits	391	**11.3**	381	**13.6**	951	**39.5**	1,475	**57.7**	1,418	**63.3**
Animal feeds	-	**16.8**	1,317	**22.3**	1,379	**10.9**	1,951	**16.5**	1,926	**12.1**

Sources: CFCE / Douanes

Section II. Trends and French Food Retail Distribution Channels

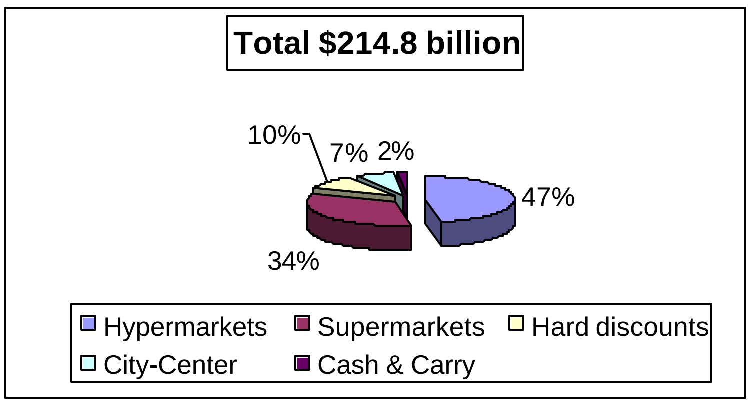
France's retail distribution network is diverse and sophisticated. French food retailers can generally be grouped into six principal formats: hypermarkets; supermarkets; hard discounters; city-center stores; department stores and traditional outlets. (please see definitions, p.12 of this report) The first five represented 75 percent of the country's retail food market, and the sixth, which includes neighborhood and specialized food stores, represented 25 percent of the market in 2005. In 2005, France's major retailers, by sales within France, were: Carrefour; Leclerc; ITM Entreprises (Intermarché); Auchan; Casino; Systeme U; and Cora (Louis Delhaize).

Major French Food Retailers, Number of Stores by Type:

	2004	2005
Hypermarkets	1,321	1,372
Supermarkets	5,621	5,573
Superettes, small convenience stores	N/A	15,000
Hard discounters	3,600	3,880
Large and medium department stores	N/A	N/A
Traditional, frozen, gas marts & others	N/A	13,504

In 2005, sales of the top 25 French food retailers were $214.8 billion, a 2.3 percent increase compared to 2004. Hyper and supermarkets were the leading retailers with 81 percent total food sales in the sector. Hard discounters maintained their ten percent market share, but lost some ground to the hyper/supermarkets' competitive price offensive. Private label sales were at an all-time high, and accounted for 30 percent of all food product retail sales. E-commerce also showed growth, with total food and beverage sales representing $275 million in 2005.

In Percentage of sales



Source: Libre Service Actualites (LSA)

Market share by type of outlet has remained fairly steady among the distribution channels in France since 1999 with hypermarkets and traditional stores losing some market share to supermarkets. In 2005, market share distribution was as follows: hypermarkets, 33.1%; supermarkets, 33.1%; traditional stores, 16.8%; small self-service and freezer centers, 8.5% and 8.5% for miscellaneous circuits comprised of open-air markets, sales from producers, catalogues and e-commerce.

Major Ten French Hyper/Supermarkets and Hard Discounters by Number of Stores in Calendar Year 2005

Hypermarkets		Supermarkets		Hard discounters	
Outlet name	N° shops	Outlet name	N° shops	Outlet name	N° shops
LECLERC	437	INTERMARCHE	1,342	LIDI	1,133
CARREFOUR	216	CHAMPION	924	ALDI	599
AUCHAN	121	SUPER U	560	ED	592
GEANT	114	SHOPI	451	LEADER PRICE	363
CORA	57	ATAC	385	NETTO	300
INTERMARCHE	158	CASINO	365	LE MUTANT	222

SUPER U	87	FRANPRIX	294	NORMA	113
HYPER U	39	ECOMARCHE	259	PENNY MARKET	94
HYPER CHAMPION	45	SUPERMARCHE MATCH	152	LES HALLES D'AUCHAN	3
CHAMPION	44	MARCHE U	134	MUTANT EXPRESS	3

Source: LSA - Les Chiffres Cles de l'Alimentaire 2005
Note: Monoprix city-center stores: 265 stores in 2005 - Source: Lineaires Panoroma de la Distribution

Major French Hyper/Supermarkets/Hard Discounters by Sales Amount in Calendar Year 2004

In million dollars

Outlet Names/Groups	***Amount of Sales in CY 2004***	***Outlet Names/Groups***	***Amount of sales in CY 2004***
E. LECLERC	33,871	LIDL	4,715
CARREFOUR (Groupe Carrefour)	29,025	MONOPRIX (Groupe Galeries Lafayette)	4,715
INTERMARCHE (Mousquetaires)	26,997	SUPERMARCHE CASINO (Groupe Casino)	3,949
AUCHAN (Groupe Auchan)	17,866	ALDI FRANCE	3,226
CHAMPION (Groupe Carrefour)	16,583	ED (Groupe Carrefour)	2,893
SUPER U (Systeme U)	14,330	HYPER U (Systeme U)	2,754
GEANT (Groupe Casino)	8,938	CASINO PROXIMITE (Groupe Casino)	2,072
CORA (Louis Delhaize)	6,824	MATCH	1,737
CARREFOUR PROXIMITE (Groupe Carrefour)	6,650	NETTO FRANCE (Les Mousquetaires)	1,104
FRANCAP (Coccinelle, etc.)	6,092	PICARD	934
ATAC (Groupe Auchan)	5,521	MARCHE U (Systeme U)	918
FRANPRIX / LEADERPRICE (Groupe Casino)	5,040	LE MUTANT (Coop)	562

Sources: LSA - Chiffres Cles de l'Alimentaire 2005
Sales for 2005 not yet released

In response to increased competition, hyper/supermarkets have been developing various lines of discounted products to offset market share inroads made by the hard discounters over the past few years. In addition, hyper/supermarkets have been trying to capture market share from the restaurant and fast-food sectors by selling ready-to-eat products such as roasted meats (i.e., cooked chicken), fresh-baked bread and pastries. They have also focused on premium quality food, including regional and exotic products.

Of interest, France recently passed legislation limiting the number of new hypermarket/supermarket openings thus prompting these large stores to expand their existing surface area. Second, mergers and alliances among major hyper/supermarkets have allied the country's 5 largest retailers with five central buying offices.

Central Buying Offices

A central buying office has mainly two objectives:

1. Referenced suppliers and products for hyper/supermarkets;
2. Negotiate tariffs and logistics with selected suppliers.

In France, there are six central buying offices, namely:

- Groupe Carrefour
- Lucie
- EMC Distribution,
- Groupe Auchan
- Groupe Intermarché
- Provera France

(contact information on p. 15 of this report)

French Central Buying Offices in 2005
By Market Share

Groups	***In value***
GROUPE CARREFOUR	*25.8%*
LUCIE	*24.0%*
EMC DISTRIBUTION	*13.4%*
GROUPE AUCHAN	*13.0*
GROUPE INTERMARCHE	*13.0%*
PROVERA FRANCE	*4.6%*

Source: ACNielsen, 2005, Parts de marché

Gas-Marts, Convenience Stores, Kiosks

Gas Station-Marts

These outlets are frequently used for stop-gap purchases and accounted for no more than one percent of total French food sales, although their sales have been increasing. These outlets are often affiliated with large distribution groups or with companies formed by the gasoline companies and distribution groups. Gasoline companies, who lost about 60 percent of their gas sales to hypermarkets, have equipped their gas-stations with small self-service food stores: there are around 410 of them throughout France.

Convenience stores

Convenience stores fall under the category of small supermarkets (superettes) generally located downtown in small cities. Their numbers are increasing and they totaled 15,000 outlets in 2005. Convenience stores are mostly affiliated with large distribution groups and depend on the same central buying offices. They are often open every day (including Sunday morning) independent and family operated. The main operators in this segment are:

- Francap (Coccinelle, Coccimarket, G20, Viveco, Panier Sympa, Diagonal, Votre

Marché, etc.)
- Carrefour (Shopi, 8 à Huit, Marché Plus, Proxi, Sherpa)
- Casino (Spar, Vival, Eco Service, Petit Casino, Casitalia, etc.)
- Franprix (Casino group)
- Systeme U (Marché U)

Traditional Outlets (neighborhood, specialized food stores and open air markets)

These outlets are supplied through wholesalers specializing in certain product categories or types of retailer. Some wholesalers are subsidaries of large retailers such as Carrefour, or of independent groups, such as Aldis, Francap, Sugro, Magex, Patisfance, Prodirest and Proxiservice. These outlets represent 20 percent of total food sales with about 50,000 outlets throughout France. Traditional grocers include gourmet stores (Fauchon, Hediard, Benois-Guyard in Lyon). Gourmet food stores carry a wide range of imported products and are located in large and medium-sized cities and attract high-income consumers. The 200 outlets in France offer US. exporters easier market access for products; the drawback is their tendency to buy in smaller quantities.

Internet Sales of Food Products and Beverages

In the large metropolitan areas, internet sales are progressing slowly. Total e-commerce sales in 2005 reached approximately $6.8 billion in 2005, of which food and beverage sales were $275 million, or four percent of all e-commerce sales.

SECTION III. BEST PRODUCT PROSPECTS

Large U.S. and other multinational companies are well established here and their products are adapted to the French market. U.S. exporters will find existing and new market opportunities for high value products in France.

A. Products Identified as Offering Opportunities for U.S. Suppliers

Home food consumption

2005 - Sales in billion dollars

Products	Total sales in France	Comments
Tropical fruits	0.7	French tastes are open to different flavours
Fish and seafood	2.8	Health benefits appreciated
Beef, horse-meat, pork, poultry[1]	12.0	EU and French regulations restrict imports of meat products and prohibit poultry products from the U.S.
Quality wines	2.5	Change in habits: lower consumption of poor quality wines to the advantage of good quality.
Grape and fruit brandies	2.6	
Fruit juices	1.2	Health benefits highlighted
Canned fruits, jams and marmalades	0.6	Sweetened product consumption is decreasing

Biscuits, pastries	3.3 rose	-same as above-
Chocolate and confectionery	3.4	-same as above-
Tea and coffee	2.1	Change in breakfast habits to tea and herb tea

(1) Excludes cooked, processed meat and sausages
Source: TNS Worldpanel - 2005

Other opportunities

Products	**Comments**
Baby foods	Increase in birth rate
Dietary products	Health concerns
Soups	Return to tradition
Smoked fish	Increase in consumption
Pet foods	Increase in pets: French are dog-lovers
Kosher foods	Religious and Health concerns
Halal foods	Large Muslim population in France

The largest and fastest growing categories of imported retail products are exotic/tropical/passion fruits (including citrus), fish and seafood (domestic production cannot meet demand), horse meat and pork, frozen foods (both ready-to-eat meals and specialty products such as pizza and ice cream), wines, fruit juices and soft drinks, canned fruits, biscuits/cookies and chocolates, teas, coffee and sauces. Health concerns and constant tax increases on alcoholic beverages have have resulted in decreased French consumption of alcoholic beverages while increasing demand for non-alcoholic beverages such as mineral water and fruit juices.

Demand is rising for organic, health, and diet foods among the increasingly health-conscious French consumers. A return to tradition is raising demand for soups. The growing number of domestic animals has stimulated demand for conventional and organic pet foods. In addition, niche markets exist in France for candies, chocolate bars, wild rice, kosher and halal foods, for which demand has been rising for several years.

B. Products Not Commonly Found on the French Market Offering Opportunities to U.S. Suppliers

_Products	**Comments**
Specialty seafood, lobsters, scallops	High demand for quality products
Tropical fruits	Receptiveness to new tastes and textures
Nuts	Receptiveness to healthy products
Prepared ethnic foods and meals	Opportunities for ethnic prepared-foods such as Cajun or California-style cuisine

C. Products Not Imported Because They Face Significant Barriers

A 1962 French law prohibits imports of poultry and egg imports from countries that use arsenic, antimony, and estrogen in poultry feed compounds. French regulations also prohibit imported products made with vitamin-enriched flour as vitamins may only be added to dietetic/health foods. Alligator is prohibited from import as well. For more information on product trade restrictions, please refer to Post Food and Agricultural Import Regulation and Standards Report (FAIRS) available on Internet website at:<http://www.fas.usda.gov>

SECTION IV. FROZEN FOOD PRODUCTS

Total French frozen food sales amounted to $9.1 billion during calendar year 2005, an increase of six percent compared to 2004. In 2005, home consumption of frozen foods was valued at $5.5 billion, representing 60 percent of total frozen food consumption, while consumption by the restaurant/institution and food service sectors was estimated at $3.6 billion, representing 40 percent of the total French frozen food consumption.

With total frozen food sales increasing by 6 percent in value and 5.4 percent in volume in 2005, compared to the previous year, the sector shows strong growth. France ranks second for sales of frozen food products after Spain. Best-selling frozen food products in 2005 were desserts, meat, seafood, vegetables and entrees/hors d'oeuvre (pizzas, quiches, tarts, etc.).

Sales of frozen foods in France is not only done in hyper/supermarkets, but also through frozen food centers and home delivery system. Frozen food centers in France is a unique concept of retail stores selling only frozen foods from entree/hors d'oeuvre to desserts. Although those frozen food centers and independent stores face tough competition from hyper/supermarkets, their respective market shares continue to increase.

Percentage of Frozen Food Sales, per Retail Outlets, in 2004 and 2005

Type of Outlet	Percentage of Sales in 2004	Percentage of Sales in 2005
Hyper and Supermarkets	50.8	50.0
Home delivery services	20.8	20.6
Freezing centers	16.5	17.3
Hard discounts	12.0	12.1

Sources: FICUR, LSA, Lineaires

The leading frozen food retailer in France, with a 14 percent market share, is Picard Surgeles which has 670 outlets throughout France, 40 in Italy, and sales in 2005 approaching $995 million. Picard sells high-end frozen products. Picard Surgeles offers opportunities for U.S. suppliers of fish and seafood, frozen fruits and vegetables, fruit juices, and specialty prepared meals.

Toupargel/Agrigel is the second largest frozen food retailer in France, and is the leader for frozen food home deliveries, before Thiriet, Maximo and Argel. In 2005, Toupargel/Agrigel sales were $473 million, an increase of 2.4 percent over the previous year. Toupargel/Agrigel offers opportunities primarily for U.S. suppliers of fish and seafood.

The major distributors of frozen food for the food service sector are:

- Promona
- Brake
- Davigel
- Mikogel
- Aviko

There are approximately 100 wholesalers/distributors of frozen food products in France. The top products imported in this category were vegetables, fish and seafood products.

Quantity of Frozen Foods Sold in Hyper/Supermarkets/Hard-Discount in 2005

Products	Quantity
Vegetables	118,243 tons
Potatoes	167,127 tons
Fish and seafood	73,379 tons
Prepared Meals	86,423 tons
Pizzas and quiches	42,493 tons
Pastries	7,838 tons
Ice creams	154 million liters

Source: TNS Worldpanel, 2005

Best Selling Products in Hyper-Supermarkets:

- Vegetables: Private label sales in 2005, represented 76.7 percent market share in volume and 60.6 percent market share in value. Major branded products are Bonduelle, representing 11.5 percent sales in volume and 18.2 percent in value, and Findus with 3 and 5.7 percent sales, respectively).

- Fish and Seafood: Private label sales in 2005, represented 47 percent market share in volume and 32.2 percent market share in value. Major branded products are Findus, representing 41.1 percent sales in volume and 53.6 percent sales in value, and Iglo with 9.5 and 13.1 percent sales, respectively.

- Prepared, ready-to-eat meals: Private label sales represented 47.6 percent market share in volume and 37.3 percent market share in value. Major branded products are Nestle, representing 24.2 percent sales in volume and 29.3 percent in value, and Marie with 13 and 14.3 percent sales, respectively.

- Pizza and quiches: Major branded products represented 50.7 percent market share in volume and 41.2 percent market share in value with Buitoni, Marie and McCain as the leading players in this market segment.

- Potatoes: Private label sales represented 46 percent market share in value. Branded products include McCain (34.3 percent market sales in value), Findus (15.2 percent) and Aviko (3.2 percent).

- Ice cream: Private label sales in 2005, represented 41.2 percent market share in volume. Major branded products are Miko (23.9 percent volume market share) and Nestle (20.6 percent).

Best-selling Products in the Food Service Sector: (accounting for 60 percent of the frozen food segment)

- Fish and seafood
- Vegetables
- Pizzas and quiches

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Definitions
(a) Hypermarket: Stores with more than 2,500 sq.m. (25,000 sq.ft) selling a wide variety of food and non-food items.
(b) Supermarket: Stores with between 400 m2 and 2,500 m2 (4,000 to 25,000 sq ft) selling a wide variety of foods and non-food household goods
(c) Superette: Stores with less than 400 m2 (4,000 sq ft) selling food and basic non-food household goods.
(d) City-center stores: Inner-city stores selling a wide variety of food, specialty foods and non-food items
(e) Hard discounters: Small supermarkets with a limited range of low cost products, often private label.
(f) Gas Marts
(g) Freezer Centers: A unique concept of retail store selling only frozen foods from entrees/hord d'oeuvre to desserts. The leading frozen food center in France is Picard.

COMPETITION

Most exporters from within the EU conduct some form of market promotion in France. Products such as fresh or preserved fruits and vegetables, wine, beer, fish and meats are commonly promoted in trade shows, advertisements and supermarkets. Non EU-countries promoting food products in France include the United States, Norway, Israel, Morocco, South Africa, Argentina, Brazil and Canada.

ROAD MAP FOR MARKET ENTRY INTO FRANCE

Entry Strategy

U.S. suppliers generally benefit from having a relationship with a local French agent or representative. Local representatives can provide up-to-date information on business practices, trade laws, sales leads, and marketing and distribution strategies. In many instances, local representatives also serve as importers and distributors. New-to-market and niche products usually enter through importers/distributors. The Office of Agricultural Affairs in Paris maintains a list of potential importers and distributors. Depending on the product, U.S. exporters can penetrate the market through:

- A central buying office or
- A specialized importer/distributor

The U.S. supplier should:

-- Submit product descriptions and price quotations
-- Submit products for laboratory testing
-- Determine sanitary/health certification and other import documents requirements

Once a product meets all the import requirements, a central buying office can include it in its product catalogue. Food retail buyers use this catalogue to make purchases for their stores. In addition to approving products, central buying offices can register and approve suppliers, apply tariffs, ensure that products comply with French regulations, and manage delivery of products according to store instructions.

Building a Relationship with a Hyper/Supermarket's Central Buying Office or Purchasing Department

Stages / Goal	Action	Follow up
Stage 1 – Create interest in your product. The goal is to be listed or referenced in a buyer's catalogue.	- Send a product promotion kit to the appropriate buyer ? who transmits it to the marketing department ? who may ask for samples ? shows interest or not: if interested, meeting with supplier requested	- with additional information on company and its factories . sanitary certificates, ISO, HACCP certificates -- **Prices are not necessary at this stage**

Building a Relationship with an Importer

An importer can offer several advantages to a U.S. supplier: market insight; information about competitors; and established retail business connections.

Stages / Goal	Action / Means
Stage 1 - Establish a contact	- Send a product promotion kit with samples; indicate prices

Stage 2 - Check the supplier's reliability	- The importer verifies that the manufacturing plants meet standards and regulations as well as the financial reliability of the supplier
Stage 3 - Commercial offer	- Price negotiations and discounts for large quantity purchases. Define logistic requirements. An exclusive contract is usually for three years.
Note: - The price needs to be included with the file when building a relationship with an importer, while it is not necessary in building a relationship with a hyper/supermarket.	

SECTION V. CONTACTS

Note: For the names of buyers, please contact:

> ***Office of Agricultural Affairs at the American Embassy in Paris***
> ***Fax: (33-1) 43 12 2662***
> ***Email: agparis@usda.gov***

ALDI

Head office: Parc d'activité de la Goële
13 rue Clément Ader
77230 DAMMARTIN EN GOELE
Tel. 33.1.60.03.68.01 - Fax 33.1.60.03.77.84
Central buying: same address
Tel. 33.1.60.03.68.21 - Fax 33.1.60.03.78.23
Internet: <http://www.aldi.fr>

AUCHAN

Purchases, logistics France:
200 rue de la Recherche
59650 VILLENEUVE D'ASCQ
Tel. 33.3.28.37.67.00 - Fax 33.3.28.37.64.00
Internet: <http://www.auchan.com>

BAUD FRANPRIX (CASINO Group)
Head office: 2 route du Plessis
94430 CHENNEVIERES SUR MARNE
Tel. 33.1.45.93.70.00 - Fax 33.1.45.93.70.69

LEADER PRICE DISTRIBUTION
2 route de Presles - Zone Industrielle
77220 Gretz ARMAINVILLIERS
Tel. 33.1.64.42.51.52 - Fax 33.1.64.42.51.59

CARREFOUR
Food Purchasing Office:
26 quai Michelet
92595 Levallois Perret cedex
Tel: 33.1.58.63.30.00 – Fax 33.1.58.63.67.50

CORA (Cora Revillon Group)
Head office:
Domaine de Beaubourg
Croissy Beaubourg - BP 81
77423 MARNE LA VALLEE CEDEX 2
Tel. 33.1.64.62.65.00 - Fax 33.1.64.80.40.51
Internet: <http://www.cora.fr>

ITM ENTREPRISES (Group of independents)
Parc de Tréville

1 allée des Mousquetaires
91070 BONDOUFLE
Tel. 33.1.69.64.10.72 - Fax 33.1.69.64.26.19
Internet: <http://www.groupedesmousquetaires.com>

LIDL (German Group LIDL UND SCHWARTZ)
Head office:
35 rue Charles Péguy
67200 STRASBOURG
Tel. 33.3.88.30.94.00 - Fax 33.3.88.29.00.29

LUCIE
Same address as LECLERC
Central buying Tel. 33.1.55.92.30.10 - Fax 33.1.55.92.30.20

METRO FRANCE
Head office:
ZA du Petit Nanterre
5 rue des Grands Prés
92000 NANTERRE
Tel. 33.1.47.86.63.00 - Fax 33.1.47.86.63.56
Internet: <http://www.metro.fr>

MONOPRIX / PRISUNIC
Head office :
Tour Vendôme
204 rond point du Pont de Sèvres
92516 BOULOGNE BILLANCOURT CEDEX
Tel. 33.1.55.20.70.00 - Fax 33.1.55.20.70.01
Internet: <http://www.monoprix.fr>

SYSTEME U
Head office: 1, rue Thomas Edison
94046 CRETEIL CEDEX
Tel. 33.1.45.17.92.00 - Fax 33.1.45.17.92.20

GEIMEX 15, rue du Louvre
75001 PARIS
Tel. 01.45.08.85.60 - Fax: 33.1.42.21.01.61
Franprix and Leaderprice

EMC DISTRIBUTION
28, rue des Vieille Vignes
77316 CROISSY BEAUBOURG
Tel. 01.61.44.70.00 - Fax 01.61.44.70.01

PROVERA 1, rue du Chenil
Domaine de Beaubourg
77183 CROISSY BEAUBOURG
Tel. 01.64.62.79.00 - Fax 01.64.62.79.01

Cash and carry

- METRO:
- BP 205 - *92002 NANTERRE CEDEX*

Tel: 01.47.86.60.00

- PROMOCASH :
- 14 avenue Sommer - *92160 ANTHONY*
Tel: 01.46.74.55.00
- PROCOMARCHE:
- 3 rue Benjamin Delessert - *77550 MOISSY CRAMAYEL*
Tel: 01.64.88.31.30

Wholesalers in dry grocery products:

- PRODIREST :
- 10 boulevard Arago - *91320 WISSOUS*
26 quai Michelet
92693 LEVALLOIS CEDEX
Tel: 01.60.13.82.00

- ALDIS :
- 1/11 rue du Puits Dixme - Senia 524
94577 ORLY CEDEX
Tel: 01.41.80.49.27

Wholesalers in spirits, wines and beverages

- PRODIREST : 10 boulevard Arago - *91320 WISSOUS*
26 quai Michelet
92693 LEVALLOIS CEDEX
Tel: 01.60.13.82.00

- ALDIS : 1/11 rue du Puits Dixme - Senia 524
94577 ORLY CEDEX
Tel: 01.41.80.49.27

- FRANCE BOISSONS : 19 rue des Deux Gares
92565 RUEIL MALMAISON CEDEX
Tel: 01.47.14.37.50

Wholesalers in frozen products

- BRAKE FRANCE : 4 allée des Séquoias - 69760 LIMONEST
Tel: 04.78.66.38.00

- DAVIGEL : BP 41- 76201 DIEPPE CEDEX
Tel: 02.35.04.76.00

- PROMOCASH: 14 avenue Sommer - 92160 ANTHONY
Tel: 01.46.74.55.00
- POMONA: Route Wissous - 91380 CHILLY MAZARIN
Tel: 01.64.54.20.20

Food buyer : M. Raphaël WEISS

- AVIKO: 9 bis rue Clément Ader - 60200 COMPIEGNE
Tel: 03.44.23.30.12
: Tel: 00 31 575 458 200 (The Netherlands)

- BRAKE FRANCE SERVICE : Route Nationale de Mons

80200 ESTREES MONS
Tel: 03.22.85.77.77
Fax: 03.22.85.77.55

This report was prepared by the Office of Agricultural Affairs in Paris in cooperation with the following consultant:

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5, rue Saint Sauveur - 75002 Paris
Phone: (33-1) 40.26.8822
Fax: (33-1) 40.26.8821
Email: etrieinter@wanadoo.fr mailto:etrieinter@wanadoo.fr

More complete lists of majors supermarket chains with buyers names per sector are available from the Office of Agricultural Affairs. For additional information, please contact:

Office of Agricultural Affairs
American Embassy
2, avenue Gabriel
75382 Paris, Cedex 08, France
Phone: (33-1).43.12.2264
Fax: (33-1).43.12.2662
Email: agparis@usda.gov <mailto:agparis@usda.gov>
Home page: <http://www.amb-usa.fr/fas/fas.htm>

Please visit our home page for more information on exporting U.S. food products to France, including « The Exporter Guide », « The HRI Food Service Sector Report », « Food Agricultural Import Regulations and Standards Report», product briefs on the market potential for U.S. products, including organic and functional foods, and a complete listing of upcoming trade shows and activities designed to promote your product in France. Importer and supermarket buyer lists are available from our office to exporters of U.S. food products.

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page: <http://www.fas.usda.gov/>