Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 9/28/2001

GAIN Report #FR1064

France

Exporter Guide

Annual

2001

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Report Highlights:

With a real growth domestic product (GDP) increase of 3.3 Percent in 2000, and on-going socio-economic and domographic changes, France offers niche market opportunties for U.S. exporters in a wide range of products. There is keen competition for French niche market. In addition, strength of U.S. dollar continues to pressure on U.S. exports to France and other countries in the EU.

This report prepared by the USDA's Foreign Agricultural Service for U.S. exporters of food and agricultural products presents a comprehensive guide on France's economic situation, market structure, exporter tips and best high-value product prospects.

Includes PSD changes: No

Includes Trade Matrix: No

Annual Report

Paris [FR1], FR

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Note: Average exchange rate used in this report for calendar year 2000 is US Dollar 1 = FF 7.11 (Source: IFM), unless otherwsie specified.

SECTION I. MARKET OVERVIEW

1. Macroeconomic Situation

According to the French Institute for Statistics (INSEE), in 2000, French real gross domestic product (GDP) grew by 3.3 percent in real terms, compared to 2.9 percent in 1999 and 3.3 percent in 1998. The 2000 performance marked the third consecutive year of growth at or over 3 percent. This is clearly an improvement since the slow growth of the mid-1990s. Inflation remained low and under control. Gross fixed investment, especially in the private sector, continued to provide the foundation for growth in 2000, expanding by 8.0 percent and
7.9 percent respectively in 1999 and 2000. Strong growth helped bring the unemployment rate down to 9.0 percent by the end of 2000. The unemployment rate continued to fall in 2001, down to 8.7 percent at the end of the first quarter (the last time unemployment fell below 10 percent was in December 1991).

The outlook for 2001 and 2002 is for continued growth, albeit at a reduced rate. As the effect of the U.S. slowdown on France and other European economies is getting clearer the government projects growth at 2.3 percent in 2001. Achieving 3 percent growth in the next few years would require very positive effects of investment in new technologies and continued efforts toward structural reforms.

Despite good short-term prospects, most observers believe that the French economy continues to function below its long-term potential. Reaching that potential will require continued deregulation and reduction of the role of the state in the economy. Progress was made during the 1990s, notably in privatization and reduction of budget deficits. But taxes remain the highest in the G-7 industrial countries. The regulation of goods and labor markets is pervasive. Structural rigidities still affect the labor market, however, and experts question whether unemployment will drop below the presumed structural rate of unemployment, estimated at 8.5 percent, absent further significant liberalization. Moreover, as of January 1, 2000, the full economic impact of the transition to the 35-hour workweek is unclear. Based on preliminary official estimates the 35-hour workweek has created 150,000 jobs in 2000 or 30 percent of new jobs. Many large companies have said that the cost of the 35-hour workweek has been partially offset by increased flexibility. France's adoption, along with 10 other EU countries, of the Euro as their single currency has increased competitive pressures on French companies and the French economy.

2. Size and Growth Rate for Consumer-Ready Food Products

Overall consumption of food and beverages increased slightly by 0.6 percent in volume during calendar year 2000, while prices increased at a great rate of 2.4 percent. After processed tobacco, meat and dairy product prices rose most rapidly, while prices for fats and oils decreased. In 2000, French consumption increased for canned foods, fruit juices, chocolate and confectionery, condiments and sauces as well as for dairy products, while it decreases for fats and oils and sugar. .

3. Key Demographic Developments

Government programs to raise the country's birth rates have led to a dramatic population increase in the last 50 years. While this growth will slow down in the next few years, France will be one of the few EU member states to experience population growth by 2050.

France: Population by Age Group (in millions)

Year	**Total**	**Less than 20 years**	**20 to 64 years**	**65 years or more**
1970	50.5	16.7	27.3	6.5
1980	53.7	16.4	29.8	7.5
1996	58.0	15.0	34.0	8.8
1997	58.1	15.0	34.0	9.0
1998	58.3	15.0	34.1	9.1
1999	58.5	15.0	34.2	9.3
2000 (P)	58.7	15.0	34.3	9.4
2001 (P)	59.0	15.0	34.5	9.6

P = Preliminary
Source: INSEE PREMIERE -

France: Demographic Evolution of Households (in millions)

Year	Number of Households
1968	15.8
1975	17.7
1982	19.6
1990	21.5
1998	23.7
1999	23.9
2000 (P)	24.2

(P) = Preliminary
Source: INSEE - Enquête Budget Famille

Socio-economic and demographic changes have significantly altered food trends in France. Trends show that French consumers want food products that offer better taste, higher quality, convenience, and more health benefits:

— Working consumers or those living alone (30 percent) have no time to prepare meals. These market segments are moving toward easy-to-prepare foods, single and double portion packs, and frozen or microwavable meals.

— The "younger" generation (26 percent) tends to be curious and enjoy trying new products. It values product image as much as it does taste.

— The BSE as well as other food crisis have raised consumer concerns about sanitation and safety issues. In turn, these concerns have led to greater demand for "natural" and "organic" food products--fruit juices, fresh and processed dietetic foods, organic food produce, fish and seafood products–and for food supplements as well as kosher foods.

Advantages and Challenges for U.S. Exporters in France

Advantages	Challenges
— The population's continuing rapid shift from rural to urban regions is boosting demand for international food in the latter. — French per capita income is near that of the United States. — The burgeoning tourist industry is raising demand for HRI products. — U.S. fast food chains, theme restaurants, and the food processing industry are pushing up demand for American food ingredients. — Domestic distribution systems are efficient. — The euro will ease entry into and dealings with EU member states. — American food and food products remain quite popular in spite of recent US-France trade differences.	— Recent food scares and other food safety issues are making French consumers more cautious. — French consumers make exacting demands when it comes to quality and innovation. — Price competition is fierce and U.S. exporters have to conform to French/European standards and regulations. — Certain food ingredients are banned or restricted from the French market. — Marketing costs to increase consumer awareness are high. — U.S. exporters should be able to evaluate their export sales price based on fundamentals such as local demand and transportation costs. — Mandatory customs duties, sanitary inspections and labeling requirements are onerous measures for U.S. exporters.

SECTION II. EXPORTER BUSINESS TIPS

1. Trade Barriers and Restrictions

Like other members of the European Union, France imposes tariff and non-tariff external barriers. Product safety and sanitary standards affecting imports into France are increasingly established at the EU level. Food products entering the EU and France are subject to customs duties which vary from one product to another. Most processed products are subject to additional import charges based on the product's sugar, milk fat, milk protein and starch content.

Although France is not a closed market, its regulations limit market access for certain U.S. agricultural products. Efforts to harmonize EU import regulations and to implement commitments under the World Trade Organization (WTO) may abolish inconsistent French and EU regulations, quota conversions, variable levies, and restrictive licensing and replace these with tariffs that will diminish over time. Agricultural products subject to French trade restrictions and barriers include:

Poultry, meat and eggs
Enriched flour
Bovine genetics
Exotic meat (alligator)
Flightless bird meat (ratite)
Live crayfish
Beef and bison meat
Fruits and vegetables
Pet foods

For more information on above product trade restrictions, food standards and regulations, please refer to Post Food and Agricultural Import Regulations and Standards Report (FAIRS) available on Internet website : http://www.fas.usda.gov

2. Consumer Tastes, Preferences and Food Safety

Like U.S. consumers, French consumers want innovative, international foods. Young consumers like ethnic products with distinctive themes and flavors--Tex-Mex, Cajun or California-style cuisine, sports drinks and vitamin enriched snacks. Ready-to-eat products such as frozen food products, seafood (particularly salmon), wild rice, innovative dietetic/health products, organic products, frozen desserts and kosher foods are gaining popularity.

While consumers and distributors tend to be receptive to new developments in food products, they want more information on product content and manufacturing processes. Labeling requirements for both domestically-produced and imported food products containing biotech or biotech derived ingredients or additives need to be labeled.

The French government has taken steps to improve food quality and to explore product innovation through research and marketing programs; quality marks such as the "Label Rouge" (Red Label) for meats, poultry and fruits and vegetables; and product origin labels which guarantee that, for instance, certain wines, milk, butter, or cheeses are sourced from a certain region. The government has also endorsed a certification program which guarantees that product preparation, manufacturing, packaging processes follow certain specifications. The organic food program certifies that agricultural and food products were manufactured without fertilizers and according to special criteria.

Polls are conducted by polling companies on the impact of food sanitation and safety issues on French consumers. Twenty-nine percent of those polled indicated that French consumers are worried about the quality of their food, particularly beef. Seventy-five percent indicated that there should be stricter labeling requirements that will guarantee product traceability.

3. Marketing Strategies for the French Market

U.S. food product exporters should consider:

Consumer characteristics
- Target dual income families, singles, senior citizens and health and environmentally-conscious consumers)
- Influence consumer choices mostly through advertising campaigns

Seasonal characteristics
- Holiday promotions
- In-store supermarket promotions

Unique U.S. products characteristics
- High quality
- Regional specialties (i.e., Florida grapefruit, California wine, Tex-Mex or Cajun style, New England seafood, etc.)

Image appeal
- Packaging can help a product find a niche in this market, particularly if the U.S. firm has access to stores and supermarkets that specialize in U.S. or foreign foods.

Trade Shows and In-Store Promotions:
- Trade shows, in-store product demonstrations and tastings can help familiarize French consumers' with U.S. food products
- Trade shows are an excellent way to introduce new products to the market.

Successful Export Planning for Your Products:

1. Conduct basic market research and review export statistics of the last five years

2. Contact the Office of Agricultural affairs at the American Embassy in Paris to obtain up-to-date information on local government regulations, customs duties, politics, demographics, infrastructure, distributions channels and market size.

3. Adapt your product to local regulations: give the customer what he wants, not what you think he needs, check your ingredients and package size requirements, verify consumers' preferences and make sure your product is price competitive

4. Identify the best distribution channel for the product, i.e., supermarkets, an importer/distributor, or a Foreign Agent. Be prepared to send samples.

5. Work with your agent, distributor/importer to determine the best promotional strategy. Be prepared to invest in the market promotion of your products (through trade shows, in-store promotions or advertising campaigns, to gain maximum exposure and make valuable market contacts). Also, be aware that promotional assistance is available for U.S. products through a variety of branded and generic promotion programs through the four State regional trade groups: FOOD EXPORT USA-NORTHEAST, SUSTA, WUSATA and MIATCO. (Addresses, telephone, fax and contact information for these four groups is listed in Section V, Appendix B, of this report).

4. General Import and Inspection Procedures

General Import Requirements

Import and export transactions exceeding FF 250,000 ($40,800) in value must be conducted through an approved banking intermediary. Goods must be imported/exported no later than six months after all financial and customs arrangements have been made.

For products originating in countries other than EU member states, the following shipping documents in French are required:

- Commercial invoice;
- Bill of landing or air waybill;
- Certificate of origin
- Sanitary/health certificate if need be (depending on the products)

Note: U.S. exporters must make sure their products comply with French regulations and must verify customs clearance requirements with local authorities through their contacts before shipping the products to France. The Office of Agricultural Affairs of the American Embassy in Paris can provide assistance and information on these matters.

Basic Labeling/Packaging Requirements:

Labels should be written in French and include the following information:

Product definition
Shelf life: Indicate "used by," and "best before" dates and other storage requirements
Precautionary information or usage instructions, if applicable
Statement of contents: ingredients, weights, volumes, etc., in metric units. All additives, preservatives and color agents must be noted on the label with their specific group name or their "E" number
Product's country of origin and name of importer or vendor within the EU
Manufacturer's lot or batch number

Inspection Process

Customs clearance can be done by a person or a company able to present Customs Authorities at the port of entry or at the airport in France the imported goods as well as the necessary accompanying documents for these products. To facilitate the clearance process, it is recommended that the U.S. exporter have the customs clearance done by either a forwarding agent or his importer/distributor or agent in the country of destination. More information may be obtained from the General French Customs Authorities listed in Section V, Appendix C, of this report.

(Generally, a visual inspection consists of verifying that products are accompanied by the correct shipping documents.

(A detailed inspection may include sampling or a chemical analysis test.

(The speed of the customs clearance procedure can depend on the thoroughness of U.S. exporters' documentation.

(When released, the foodstuffs are subject to ad valorem customs duties levied under the Common External Tariff. Duties differ according to product. Also, in addition to customs duties, foodstuffs imported into France are subject to a Value-Added Tax (VAT). Currently the VAT is generally charged at one of the two following rates:

- Standard rate of 19.6 percent applies to alcoholic beverages, chocolate and candies
- Reduced rate of 5.5 percent applies mostly to agricultural and food products.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

Key Figures for the French Food Industry and Growth Rates

- The food industry is the largest French industrial sector, accounting for 19 percent of the GDP economy's added value. It is also the world's largest player accounting for 10 percent of the world's value-added food trade.

- France has currently 30 major food processors, and over 4,250 food industry companies.

- According to the French Food Industry Association (ANIA), in 2000 the food processing sector's turnover was FF 825 billion ($116 billion), an increase of 1.1 percent from the 1999 level. The French food industry represents 19 percent of total food sales of the European Union making the French food processing industry number one in Europe.

- In 2000. the French food industry continued to restructure in the face of greater competition from large multinational groups and of the globalizing effects of the Euro.

- Total Exports in 2000: FF 180 billion ($25 billion), 5 percent increase in value over 1999. The French food industry is the world's largest exporter of processed products with about 10 percent of the global market.

- Total Imports in 2000: FF 125 billion ($17.6 billion), 7 percent increase in value over 1999.

Production of Major French Food Processing Sectors (1) and Growth Rates

	Volume % Growth 2000/99	Price % Growth 2000/99	2000 Value (In billion $)
Grains and animal feed	+1.1	+3.9	11.4
Bread & Pastry	+1.8	+1.4	11.7
Canned foods, prepared fruit juices and vegetables	+2.7	+0.1	7.5
Meat Industry	+0.2	+5.8	28.0
Milk Industry	+1.6	+2.0	15.8
Beverages Industry	-2.8	+1.1	13.6
Fats and Oils	+0.3	-1.6	1.8
Sugar	-5.2	-1.0	3.1
Miscellaneous (2)	+4.1	-0.1	11.7
Total of Food Processing Sectors	***+0.6***	***+2.5***	***105.5***

(1) Wine production is not a food industry but agricultural activity.
(2) Chocolate, preparations for beverages, baby foods, canned desserts.
Source: INSEE - National Account

Infrastructure Situation

France’s transportation infrastructure is among the most sophisticated in the world, benefitting from advanced technology and extraordinary investment by the Government. The three main entry points for air-freight are the Orly and Charles de Gaulle airports in Paris and Saint-Exupéry airport in Lyon. France has twelve major seaports, many of which are equipped for container ships. There is also an extensive highway and river-transport systems, and a state-owned rail network that is among the most comprehensive and technologically advanced in the world.

Communications infrastructure is similarly advanced. Telephone lines blanket the country and there is easy access to the Internet via French and foreign service providers. The French "Minitel" telephone-based computer network is also widespread and provides many consumer services. France is behind the U.S. and some other countries in the use of personal computer and the Internet, but is catching up rapidly. High-speed Internet access is still limited, but should expand rapidly in 2002. The government is trying to promote better use of information technologies.

Market Trends

The French market for food products is mature, sophisticated and well-served by suppliers from around the world. Generally, high quality food products with an American image can find a niche in the French market, particularly if they have access to stores and supermarkets that specialize in U.S. or foreign foods. Niche market opportunities also exist for regional American foodstuffs (Tex-Mex, Cajun and California cuisine), candies and chocolates, wild rice, and organic and health food products.

The French food industry will move towards fresh consumer-ready products at the expense of frozen foods.

Marketing U.S. Products & Distribution Systems

For detailed information on the distribution systems and the best market entry approach for new-to-market exporters for the retail food sector, see Post Retail Food Sector Report.

The Hotel/Restaurant Institutions (HRI) sector in France usually uses the services of wholesalers or processed food buyers, and the well developped distribution channels of the wholesalers/importers are often the key to getting a new food product into that sector. A report on the HRI sector in France is available on the FAS web site.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Significant market opportunities for consumer food/edible fishery products exist in a number of areas: fruit juices and soft drinks (including flavored spring waters), dried fruits and nuts, fresh fruits and vegetables (particularly tropical and exotic), frozen foods (both ready-to-eat meals and specialty products), snack foods, tree nuts, "ethnic" products, seafood (particularly salmon), innovative dietetic and health products, organic products, soups, breakfast cereals and pet foods. In addition, niche markets exist in France for candies, chocolate bars, wild rice and kosher foods which have seen growing demand. Market opportunities for U.S. exporters also exist for oilseeds, protein meals and other feeds, as well as for wood products and grains.

Listed below are six consumer-oriented food products which the Office of Agricultural Affairs considers "best prospects" for U.S. business.

Top 6 Market Opportunities for Consumer-Oriented Food Products
(USD million)

1. Name of Best Prospect: **FISH AND SEAFOOD, FRESH AND FROZEN**
Commodity Code Number: HS Code: 03

	1998	1999 (Jan-Dec)	2000
A. Total Market Size	3,988	3,760	N/A
B. Local Production	1,629	1,592	N/A
C. Total Exports	1,079	1,058	1,048
D. Total Imports	3,438	3,226	2,919
E. Total Imports from U.S	110	113	97
F. Exchange Rate: USD 1.00 =	FF5.75	FF6.15	FF7.11

Source: French Customs/SCEES - French Ministry of Agriculture
N/A: Not available.

Comments: France is a net importer and growing market for seafood and the United States is one of the top ten leading suppliers to France. U.S. seafood shipped to France consists mainly of dogfish, monkfish, lobster, salmon, and surimi base. Fish and seafood products selling the best in France are fish fillets and ready-to-eat seafood products. French demand for surimi lobster, scallops and fresh packed fish is increasing and offers potential niche market opportunities.

Although France currently produces 820,000 MT of seafood per year (wild catch plus aquaculture), the domestic supply cannot keep up with the growing demand. Despite tough competition from EU countries, China and Chile, the U.S. seafood sector is in an excellent position to export to the French market; however, only seafood processed in an EU-certified establishment is allowed to enter the EU market and France. Fish exports to France must be free of a prohibited additive called sodium tri-phosphate.

2. Name of Best Prospect: **PROCESSED FRUITS AND VEGETABLES, INCLUDING FRUIT JUICES**
Commodity Code Number: HS Code: 20

	1998	1999 (Jan-Dec)	2000
A. Total Market Size	6,276	7,146	6,146
B. Local Production	5,499	6,293	5,262
C. Total Exports	982	958	790
D. Total Imports	1,759	1,811	1,674
E. Total Imports from U.S.	81	113	102
F. Exchange Rate: USD 1.00 =	FF5.75	FF6.15	FF7.11

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: Fruit juices and soft drinks in France are currently the most dynamic growth sectors among non-alcoholic beverages, with a per capita consumption for fruit juices estimated to 20 liters a year. The French fruit juice market is very sophisticated due to the experience of distributors, variety of packaging, diversity of flavors and quality types, product innovation, advertising investment and promotions, as well as price ranges. In 2000, French imports totaled about FF 4.2 billion ($ 589 million). Imports from the United States mostly consist of fresh and frozen orange and grapefruit juices and amounted to FF 594 million ($83 million) in 2000, an increase of 3.3 percent in value over the previous year. Competition is very strong principally from Brazil, Israel and Spain, which benefit from preferential tariffs.

3. Name of Best Prospect: **BEVERAGES, INCLUDING MINERAL WATER, BEER, WINE AND SPIRITS**

Commodity Code Number: HS Codes: 22.01 to 22.06 and 22.07+22.08

	1998	1999 (Jan-Dec)	2000
A. Total Market Size	8,928	9,114	8,326
B. Local Production	16,156	16,553	14,897
C. Total Exports	9,000	9,198	8,090
D. Total Imports	1,772	1,759	1,519
E. Total Imports from U.S.	43	71	41
F. Exchange Rate: USD 1.00 =	FF 5.75	FF6.15	FF7.11

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: French imports of U.S. wine totaled FF 82 million ($11 million) in 2000, representing 2.7 percent of total French wine imports. Most American wines sold in France are bulk wines. U.S. wines in France face strong competition from France's leading suppliers (Italy, Spain, Greece), as well as from new world countries such as Australia, South Africa and Chile. However, market opportunities exist for U.S. wines in France thanks in part to the "exoticism" and quality of the products and the promotional efforts made by American restaurants in France.

The French are also significant consumers of spirits. U.S. spirits imports in France increased 3.5 percent in value in 2000, compared to 1999, with total French imports estimated at FF 204 million ($29 million).

Opportunities exist for new and innovative U.S. products, particularly those that can be linked with Tex-Mex foods. Also, sales of innovative products such as beer with whiskey malt are on the rise, as are sales of non-alcoholic beers and "panaches" (mixture of beer and lemonade).

Currently, the French beer industry consists of 24 breweries with two American brewers present in the French market: Anheuser-Bush and Miller. The French beer market represents about 16 percent of total alcoholic and non-alcoholic beverage sales and 2 percent of total food and beverage sales in France. Annual per capita consumption of beer in France is estimated at 39 liters.

4. Name of Best Prospect: **FRESH AND DRIED FRUITS, INCLUDING NUTS**
Commodity Code Number: HS 08

	1998	1999 (Jan-Dec)	2000
A. Total Market Size	3,870	3,474	3,262
B. Local Production	2,757	2,439	2,430
C. Total Exports	1,424	1,308	1,141
D. Total Imports	2,537	2,343	1,973
E. Total Imports from U.S.	138	92	88
F. Exchange Rate: USD 1.00 =	FF5.75	FF6.15	FF7.11

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: Off-season and extended-season sales, as well as years of short French fruit crops, represent the best opportunities for U.S. suppliers. France is one of the most important markets for U.S. grapefruit (mostly from Florida), valued at FF 169 million ($24 million) in 2000, as well as apples and pears (in short crops). There is also a niche market for berries, cherries and tangerines. In 2000, U.S. fresh fruit exports to France were valued at FF 193 million ($27 million).

The snack and nut product niche market is important for U.S. exporters, who can profit from promoting their products as healthy and high-quality. Dried fruits and nuts, generally salted, are mainly consumed as snacks with aperitifs. Among the most popular snacks are cashews, almonds, pecans, hazelnuts and pistachios, all of which sell best when merchandised in bulk packages. French consumption of these products has doubled over the past seven years as the French have begun to snack between meals. Although France is a significant grower of walnuts, French import demand is primarily determined by the size of the domestic production. The United States remains France's leading supplier of in-shell walnuts whereas Moldova and China provided the bulk of shelled imports.

5. Name of Best Prospect: **FRESH AND DRIED VEGETABLES**
Commodity Code Number: Hs Code: 07

	1998	1999 (Jan-Dec)	2000
A. Total Market Size	3,375	5,542	5,845
B. Local Production	3,216	5,415	5,570
C. Total Exports	1,340	1,353	749
D. Total Imports	1,499	1,480	1,024
E. Total Imports from U.S.	29	26	23
F. Exchange Rate: USD 1.00 =	FF 5.75	FF6.15	FF711

N/A: Not Applicable
Source: French Customs/SCEES - French Ministry of Agriculture

Comments: Opportunities in this market are for U.S. fresh vegetables of superior quality and produced off-season (i.e., from November through February, depending on the Spanish crops and U.S. prices). There are niche market opportunities for asparagus, eggplant, zucchini, sweet peppers and iceberg lettuce. Opportunities for U.S. exports of carrots (March/April), cucumbers (November/December), and celery in various months are dependent on the availability of EU supplies.

Opportunities for U.S. tomatoes and cauliflowers are very limited due to strong competition from Morocco and EU countries, mostly Belgium and Spain. Also, recent trends and increased consumption indicate growing demand for fresh prepared vegetables (washed and cut) and many supermarkets have a special section for these types of products. There is also a growing demand for organic vegetables.

6. Name of Best Prospect: **MEAT AND OFFALS**
Commodity Code Number: HS Code: 02

	1998	1999 (Jan-Dec)	2000
A. Total Market Size	5,534	6,699	6,266
B. Local Production	6,030	7,070	6,550
C. Total Exports	3,368	3,144	2,876
D. Total Imports	2,872	2,773	2,592
E. Total Imports from U.S.	29	22	19
F. Exchange Rate: USD 1.00 =	FF 5.75	FF6.15	FF7.11

Source: French Customs/SCEES - French Ministry of Agriculture

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

For further information contact:
Office of Agricultural Affairs
American Embassy
2, avenue Gabriel - 75382 Paris Cedex 08
Tel: (33-1) 43 12 2264
Fax: (33-1) 43 12 2662
Email: agparis@fas.usda.gov
homepage: http://www.amb-usa.fr/fas/fas.htm

For more information on exporting U.S. food products to France, visit our homepage. The OAA homepage includes information on the HRI and Retail food sector, Food and Agricultural Import Regulations and Standards, product briefs on the market potential for U.S. products, upcoming promotional trade shows and fairs in France. Importer 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

APPENDIX A
FOOD AND AGRICULTURAL TRADE SHOWS IN FRANCE 2001/2002

PREMIERE VISION
Paris-Nord Villepinte
October 5-7, 2001
Organizer: Premiére Vision Le Salon
Tel: (33-4) 72 60 6500
Fax: (33-4) 72 60 6509
E-mail: info@premierevision.fr
Internet: www.premiere.fr
Held every sixth months

International Cotton & Textile Show

DIETEXPO
Paris, Porte de Versailles
October 20-22, 2001
Organizer: COMEXPO PARIS
Tel: (33-1) 49 09 6153
Fax: (33-1) 49 09 6003
Internet:http://comexpo-paris.com
E-mail: sdalouche@comexpo-paris.com
Contact: Sylvie Dalouche
Biennial Exhibition

International Health/Dietetic & Organic Show

FOIRE INTERNATIONALE DE DIJON
October 31-November 11, 2001
Organizer: Parc des Expositions et Congres de Dijon
Tel: (33-3) 80 77 3900
Fax: (33-3) 80 77 3939
E-mail: congrexpodijon@axnet.fr
Annual Fair

International Food & Beverages Show

BATIMAT
Paris, Porte de Versailles
November 5-10, 2001
Organizer: MILLER FREEMAN/Batimat Construction
Tel: (33-1) 47 56 5102
Fax: (33-1) 47 56 0818
E-mail: info@batimat.com
Biennial Exhibition

Building & Construction Show

PARIS HORSE SHOW
Paris-Porte de Versailles
December 1-9, 2001
Organizer: Comexpo Paris
Tel: (33-1) 49 09 6000
Fax: (33-1) 49 09 6158
Internet: http://www.salon-cheval.com/E-mail: tpiry@comexpo-paris.com
Annual Show

International Horse, Poney & Donkey Show

SALON INTERNATIONAL DU VEGETAL
Parc des Expositions Angers
February 20-22, 2002
Organizer: BHR Centre Regional Horticole
Tel: (33-2) 41 79 2929
Fax: (33-2) 41 79 2900
E-mail: bhr@wanadoo.fr
Annual Show

"The most plant-like of shows"
International Professional Show

SALON INTERNATIONAL DE L'AGRICULTURE
Paris Porte de Versailles
February 23-March 3, 2002
Organizer: Comite des Expositions de Paris
Tel: (33-1) 49 09 6000
Fax: (33-1) 49 09 6158
E-mail: agriculture@comite-expo-paris.asso.fr
Internet: http://www.comite-expo-paris-asso.fr
Annual Show

International Agricultural Show

FOIRE INTERNATIONALE DE LYON
Lyon - Eurexpo
March 15-25, 2002
Organizer: SEPELCOM
Tel: (33-4) 72 22 3264
Fax: (33-4) 72 22 3282
E-mail: foire@sepelcom.com
Annual Fair

International Food, Beverages & and Tourism Fair

FOIRE INTERNATIONALE DE PARIS
Paris Porte de Versailles
April 30-May 12, 2002
Organizer: Comite des Expositions de Paris
Tel: (33-1) 49 09 6000
Fax: (33-1) 49 09 6003
E-Mail: info@comite.expo.paris.asso.fr

International Food, Beverages & Tourism Fair

Annual Fair

FOIRE INTERNATIONALE DE BORDEAUX — International Food & Beverages Fair
Bordeaux Lac
May 4-13, 2002
Organizer: Comite des Expositions de Bordeaux
Tel: (33-5) 56 11 9900
Fax: (33-5) 56 11 9999
E-mail: foire@bordeaux-expo.com
Annual Fair

EUROKOSHER — International Kosher Food Exhibition
Paris - Porte de Versailles
June 4-5, 2002
Organizer: Pierre Levy
Tel: (33-1) 53 53 9393
Fax: (33-1) 49 53 04 8253
E-mail: gastronomika@aol.com
Internet: http://www.gastronomika.com

ETHNIC FOOD SHOW — International Ethnic & Specialty Foods
Porte de Versailles, Paris
June 10-11, 2002
Organizer: Algodoal
Tel: (33-1) 44 74 5010
Fax: (33-1) 44 74 5067
E-mail:ABonnel@aol.com
Annual Show

FOIRE INTERNATIONALE DE STRASBOURG — International Food & Beverages Fair
Strasbourg Parc des Expositions
September 6-16, 2002
Organizer: SOFEX
Tel: (33-3) 88 37 2121
Fax: (33-3) 88 37 3795
Internet: www.foireeurop.com
Annual Fair

SALON DE LA PRODUCTION ANIMALE — International Livestock Production Show
Carrefour Europeen - Rennes
September 10-13, 2002
Organizer: SPACE
Tel: (33-2) 99 67 1020
Fax: (33-2) 99 67 7845

Internet: www.space.fr
Annual Show

FOIRE INTERNATIONALE DE CAEN
Caen Exhibition Center
September 20-30, 2002
Organizer: Caen Expo Congress
Tel: (33-2) 31 29 9999
Fax: (33-2) 31 29 9960
E-mail: Ph.Bertin@caen-expo-congress.com
Annual Fair

International Food, Beverages & Machinery Fair

SIAL 2002
Paris-Nord Villepinte
October 20-24, 2002
(FAS/Washington sponsorizes an American Food Pavilion)
Organizer: IMEX Management Inc.
Tel: (704) 365 0041
Fax: (704) 365 8426
Internet: http://www.sial.fr - Biennial Show
Email: **exposium@imexmg.com**

International Food Products Show

SIRHA INTERNATIONAL
FOOD TRADE EXHIBITION
Lyon - Eurexpo
January 25-29, 2003
Organizer: SEPELCOM
Tel: (33-4) 72 22 3255
Fax: (33-4) 72 22 3218
Internet: www.sirha.com
Contact: Marie-Odile Fondeur
Email: mofondeu@sepelcom.com

VINEXP0
Bordeaux-Lac
June 22-26, 2003
Organizer: Vinexpo
Tel: (33-5) 56 56 0022
Fax: (33-5) 56 56 0000
E-mail: info@vinexpo.fr
Internet: http://www.vinexpo.fr

International Wine & Spirits Exhibition

APPENDIX B

U.S. BASED STATE REGIONAL TRADE GROUPS

FOOD EXPORT USA - NORTHEAST
1036 Public Ledger Building
150 South Independence Mall West
Philadelphia, PA 19106-3410
Tel: (215) 829 9111/Fax: (215) 829 9777
E-Mail: Eusafec@redrose.net
Contact: Tim Hamilton, Executive Director

MID-AMERICA INTERNATIONAL AGRI-TRADE COUNCIL (MIATCO)
400 West Erie Street, Suite 100
Chicago, Illinois 60610
Tel: (312) 944-3030/Fax: (312) 944-1144
E-Mail: 76035.3336@Compuserve.Com
Contact: Tim Hamilton, Executive Director

SOUTHERN U.S. TRADE ASSOCIATION (SUSTA)
World Trade Center, Ste 1540
2 Canal Street
New Orleans, LA 70130-1408
Tel: (504) 568-5986/Fax: (504) 568-6010
E-Mail: Susta@Susta.Org
Contact: James Ake, Executive Director

WESTERN U.S. AGRICULTURAL TRADE ASSOCIATION (WUSATA)
2500 Main Street, Suite 110
Vancouver, WA 98660-2967
Tel: (360) 693 3373/Fax: (360) 693 3464
E-Mail: 75321.3436@Compuserve.Com
Contact: Alexa Hamilton, Executive Director

APPENDIX C

FRENCH GOVERNMENT AGENCIES

Agency responsible for French label/product ingredient regulations:

Direction Générale de la Concurrence, de la Consommation
et de la Répression des Fraudes (DGCCRF)
Ministère de l'Economie, des Finances et de l'Industrie
59, boulevard Vincent Auriol
75703 Paris Cedex 13
Tel: (33-1) 44 87 1717/Fax: (33-1) 44 97 3031
Internet: www.finance.gouv.fr

Agency responsible for promotion and control of food quality:

Direction Générale de l'Alimentation (DGAL)
Ministére de l'Agriculture et de la Pêche
251, rue de Vaugirard - 75015 Paris
Tel: (33-1) 49 55 4955
Fax: (33-1) 49 55 4850
Internet: www.agriculture.gouv.fr

For information on duties, taxes, and documentation:

Centre de Renseignements Douaniers
84, rue d'Hauteville
75010 Paris
Tel: (33-1) 53 24 6818/Fax: (33-1) 53 24 6830
Email: dgdddicrt01@calva.net

STATISTICS

A. KEY TRADE AND DEMOGRAPHIC INFORMATION FOR 2000

AgImports from All Countries (1)	$28,096 million
U.S. Market Share (1)	3 percent
Consumer Food Imports from All Countries (1)	$15,978 million
U.S. Market Share (1)	2 percent
Edible Fishery Imports from All Countries (1)	$2,994 million
U.S. Market Share (1)	4 percent
Total Population/Annual Growth Rate (5)	60.6 million 0.5 percent (Nov. 2000)
Urban Population /Annual Growth Rate	48.0 million N/A
Number of Metropolitan Areas (2)	4
Size of the Middle Class (3)	85 percent of total population
Per Capita Gross Domestic Product	$21,518
Unemployment Rate	9.5 percent
Percent of Female Population Employed (4)	48.3 percent (March 2001)
Exchange Rate: US$1 = EURO 1.0854 = FF 7.12	

Footnotes

(1) United Nations Statistical Data
(2) Population in excess of 1,000,000
(3) This notion doesn't exist as such in France. However, if you define the middle class by excluding the poorest and the wealthiest, the middle class represent 85% of the population
(4) Percent against total number of women (15 years old or above)
(5) Preliminary figures

B. CONSUMER FOOD AND EDIBLE FISHERY PRODUCTS IMPORTS

France Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
(In Millions of Dollars)	1998	1999	2000	1998	1999	2000	1998	1999	2000
CONSUMER-ORIENTED AGRICULTURAL TOTAL	17,515	16,957	15,978	362	349	329	2	2	2
Snack Foods (Excl. Nuts)	1,542	1,457	1,372	5	3	3	0	0	0
Breakfast Cereals & Pancake Mix	180	198	173	6	1	1	3	0	0
Red Meats, Fresh/Chilled/Frozen	2,331	2,264	2,168	28	22	19	1	1	1
Red Meats, Prepared/Preserved	467	414	421	1	1	1	0	0	0
Poultry Meat	280	262	253	1	1	1	0	0	0
Dairy Products (Excl. Cheese)	1,564	1,448	1,428	1	1	1	0	0	0
Cheese	682	681	654	1	1	1	0	0	0
Eggs & Products	85	79	90	1	4	4	2	5	5
Fresh Fruit	2,038	1,924	1,755	35	32	28	2	2	2
Fresh Vegetables	1,111	1,102	1,047	2	2	2	0	0	0
Processed Fruit & Vegetables	1,757	1,757	1,611	22	31	28	1	2	2
Fruit & Vegetable Juices	543	603	602	69	93	85	13	15	14
Tree Nuts	300	243	233	79	56	60	26	23	26
Wine & Beer	906	862	709	9	11	12	1	1	2
Nursery Products & Cut Flowers	888	891	853	2	2	2	0	0	0
Pet Foods (Dog & Cat Food)	151	146	154	10	11	8	6	7	5
Other Consumer-Oriented Products	2,690	2,624	2,454	91	80	76	3	3	3
FISH & SEAFOOD PRODUCTS	3,434	3,218	2,994	114	123	107	3	4	4
Salmon	374	422	380	14	19	16	4	4	4
Surimi	50	51	48	16	18	15	32	36	30
Crustaceans	912	896	848	24	31	33	3	3	4
Groundfish & Flatfish	804	781	716	31	29	25	4	4	3
Molluscs	302	279	250	7	7	7	2	3	3
Other Fishery Products	992	789	752	22	18	13	2	2	2
AGRICULTURAL PRODUCTS TOTAL	24,987	23,694	22,614	832	684	645	3	3	3
AGRICULTURAL, FISH & FORESTRY TOTAL	30,737	29,292	28,096	1,048	897	837	3	3	3

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

C. TOP FRENCH 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY

CONSUMER-ORIENTED AGRICULTURAL IMPORTS ($1,000)	1998	1999	2000
United States	362,221	348,613	329,079
Spain	2,417,367	2,310,323	2,368,809
United Kingdom	1,162,505	1,003,508	871,724
Netherlands	2,508,618	2,562,251	2,367,729
Belgium	0	2,445,634	2,276,732
Germany	2,167,771	2,132,416	2,077,368
Italy	1,622,656	1,632,910	1,501,367
Ireland	541,272	524,365	464,469
Morocco	379,286	401,177	349,577
Denmark	397,485	343,785	325,526
Switzerland	219,762	250,174	224,891
Cote d'Ivoire	185,259	182,406	180,686
Israel	213,204	198,203	178,677
Portugal	205,031	205,197	177,749
New Zealand	162,240	164,538	161,427
Other	4,969,985	2,250,996	2,122,244
World	17,514,657	16,956,543	15,978,107

FISH & SEAFOOD PRODUCT IMPORTS ($1,000)	1998	1999	2000
United States	114,209	123,387	107,443
United Kindgom	410,092	422,057	360,628
Belgium	0	108,976	86,826
Norway	320,177	354,882	298,493
Spain	184,072	198,138	208,412
Netherlands	168,309	164,744	161,513
Denmark	182,180	166,250	154,990
Cote d'Ivoire	216,587	108,220	95,350
Iceland	125,526	98,768	87,294
Madagascar	96,345	76,998	84,798
Germany	117,446	98,414	84,401
Ireland	88,865	93,191	79,525
Thailand	116,180	70,371	69,091
Senegal	104,431	68,809	62,831
Chile	50,655	46,239	56,537
Other	1,139,351	1,018,345	996,187
World	3,434,418	3,217,816	2,994,331