



Voluntary Report - public distribution

Date: 12/15/2000

GAIN Report #FR0059

France

Kosher Foods in France - Revised Report

2000

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Report Highlights:

France is a major center for kosher foods with sales increasing at a rate of ten percent a year, this market is estimated to reach \$450 million in 2001. Imported and domestic products are distributed not only in specialized retail and kosher shops, but can also be found in special kosher sections in supermarkets in France.

Best prospects for kosher foods in France are gourmet-style products including wines, matzos, sauces, snacks and vegetarian food products.

Includes PSD changes: No
Includes Trade Matrix: No

Summary

Thirty years ago, the kosher market in France was considered a niche market; today, it has emerged as a major center for kosher foods. More than 80 percent of France's Jewish population is of Sephardic origin, which has a heavy influence on Mediterranean-style foods represented in 160 kosher restaurants, bakeries, and other eating establishments in Paris. Imported and domestic products are distributed not only in specialized retail and kosher shops, but can now be found in special kosher sections in supermarkets all over France's major cities. The best prospects for kosher foods in France are gourmet-style products including wines, matzos, sauces, snacks, and vegetarian food products.

1. Market Overview

The French Jewish community, with an estimated population of 700,000, is one of the largest in Europe. Forty-six percent live in Paris and the surrounding suburbs, 15 percent in Marseille, and the remainder in large cities such as Lyon, Strasbourg, and Toulouse. The kosher food market in France is currently estimated to \$385 million, which is increasing at a rate of 10 percent a year and is expected to reach \$450 million in 2001.

Kosher food trade in France has been active since the 11th century. Prior to the Revolution of 1789, the Jewish communities in France traded among themselves and with other countries. After the Revolution, the settlement and demography of these populations changed profoundly, and in 1806, Napoleon founded the Chief Rabinat Congregation of France, representative of the Jewish community. Commercially, the role of the Chief Rabinat Congregation is the organization of the ritual slaughter of animals (Pisani decree April 1964 and French Ministry of Agriculture decree of 1970), as well as the ritual inspections/approvals of kosher stores.

Destroyed during World War II, the kosher food trade took off again in the 1960's with the repatriation of the Jewish population from North Africa, which brought its food preferences from Algeria, Tunisia, and Morocco.

Jewish Communities in France	Estimated Population
Paris and Paris Area	325,000
Marseille	105,000
Lyon	70,000
Strasbourg	70,000
Other Locations	130,000
Total	700,000

Source: The Israeli Congregation of Paris.

France defines the Jewish community according to its origins. There are two main groups: "Aschkenazim," from northern and eastern European countries, and "Sephardim," from the Mediterranean basin countries (Algeria, Lebanon, Morocco, Syria, and Tunisia).

The religious calendar drives kosher food consumption in France. Consumption increases during religious

holidays, especially Passover, Shavuot, Rosh Hashana, Yom Kippur, and Sukkoth. Also, personal and family events (birthdays, births, weddings, bar/bat mitzva, etc.) and professional events have contributed to the increase in household and institutional consumption of kosher foods. However, estimating the total market size is difficult, since consumption is seasonal in nature, increasing during the Jewish holidays and remaining at a lower level during non-holiday periods.

The non-Jewish community is believed to account for a large percentage of kosher food consumption. For example, other ethnic or religious groups such as the Muslims are important markets for kosher products. People who are vegetarians or lactose-intolerant purchase a significant amount of kosher pareve products because of the assurance that this designation means that neither meat nor dairy products are used to make the product. Other consumers select kosher products for different reasons, including taste, cultural traditions, a reputation for high quality, or a perception of sanitary and quality assurance provided by the kosher certification.

2. Domestic Production of Kosher Products

France is now the European center for kosher food sales, both in the dynamism of its population and kosher professionals, and in the number of institutions purchasing kosher foods (estimated at 5,000).

The 10 largest French kosher food manufacturers produce and distribute kosher foods all over Europe. In general, locally manufactured kosher products are more price-competitive than imported kosher products. Both imported and domestic kosher products can be found in kosher sections at local supermarkets throughout Paris, Marseille, and Lyon in major chains such as Auchan, Franprix, Carrefour, and Leclerc, as well as in specialized retail shops. In addition, there are at least two networks of kosher stores, Naouri Cash Casher (20 stores) and HyperCasher (5 stores).

A typical kosher store in Paris carries a variety of pastries, condiments, cheese, olives, and wines. There are over 160 kosher wines produced in France. The French Jewish community consumes a significant amount of wine, not only for sacramental purposes, but also during ordinary meals. In addition to French products, the stores also carry many items from Israel, including brands such as Osem, Elite and Carmel, and a smattering of American products including Kedem Grape Juice, Rokeach Gefilte Fish, Pasksez, and Gefen.

3. Certification Process

To be accepted and recognized as kosher, products must have the “K” identification with the name of the rabbi who certified the product. For delicatessen products, the word “casher” must appear both in French and Hebrew, plus the name of the city of the rabbi. The OU of the Union of Orthodox Jewish Congregations is recognized in France.

In France, the certification of kosher foods is controlled by the Beth-Din “House of Law.” This institution identifies and verifies all kosher food products sold in France and also inspects the manufacturing establishments. A kosher certification for France that will regroup all logos and French certifications will soon be issued under the control of the French Beth-Din.

4. Packaging/Labeling and Duties

French import regulations and labeling requirements also apply to kosher foods. Labels must be 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 European Union
- Manufacturer’s lot or batch number

Also, food products entering the EU and France are subject to customs duties that vary by product. Most processed products are subject to additional import charges based on the product’s sugar, milk fat, milk protein, and starch content. Exporters are advised to maintain close contact with an established French importer for current requirements.

5. Retail and Institutional Sales

Development of the local kosher industry has led to increased competition at the retail and wholesale levels. To date, 500-600 companies are dealing exclusively in the kosher food business in France, as follows:

- 18 percent are manufacturers, processors of meat and dairy products
- 26 percent wholesalers, distributors, occasional or regular manufacturers. These companies import and export kosher foods for supermarkets (40 percent) and specialized stores (60 percent)
- 41 percent are retail stores
- 16 percent are in the hotel, restaurant, and institutional (HRI)

Total Sales for above Companies

Company Types	Total Sales in 1999 (in million dollars)	Estimated Sales in 2000 (in million dollars)	Estimated Sales in 2001 (in million dollars)
Manufacturers/ Processors	\$52	\$53	\$62
Wholesalers/ Distributors	\$221	\$241	\$267
Retailers	\$90	\$94	\$99
HRI	\$22	\$22	\$22
TOTAL	\$385	\$410	\$450

Source: Markethnic (Ethnic Marketing Communication Agency)

Retail prices of kosher foods are 15-20 percent higher than those of non-kosher foods. Most imported kosher food products marketed in France are from Israel.

Food service is also booming in France and kosher catering in some large establishments in Paris is as much as 10-12 percent of overall business. Reliable catering sources say that Servair, France's dominant airline caterer, uses kosher foods, and the sources view the interest of Servair as recognition of the tremendous growth of kosher food service in France. Kosher has become so popular in France that a glossy magazine called "Le Cachere" now reaches over 30,000 people. A recent listing in the magazine of products certified as kosher by Parisian rabbinic authorities exceeded 5,000 items.

6. Market Opportunities

The best prospects for kosher foods in France are gourmet-type products including wines, as well as matzos, sauces, snacks, soups, crackers, vegetarian items, and citrus-related products. Products may be of gourmet quality (highest price) or in the medium price range.

The best way for a U.S. company to promote the sale of kosher foods is to participate in trade shows. The Office of Agricultural Affairs recommends participation in two major trade shows in France:

The First European kosher food trade show, in partnership with Kosherfest:

EUROKOSHERFEST

Dates: May 15-16, 2001

Place: Paris, Porte de Versailles

Show Organizer:

Pierre Lévy

62, avenue de Wagram - 75008 Paris

Tel: (33-1) 48 88 0505

Fax: (33-1) 47 66 8068

Email: gastronomika@aol.com

Internet: <http://www.gastronomika.com>

Or:

Integrated Marketing & Communications, Inc.
(IMC)

Suite 1317, 225 W. 34th Street

New York, N.Y. 10122

Tel: (212) 643 1623

Fax: (212) 643 9164

Email: info@koshertodayonline.com

Contact: Menachem Lubinsky/Phyllis Koegel

SALON INTERNATIONAL DE L'ALIMENTATION
(SIAL)

Dates: October 20-26, 2000

Place: Paris-Nord Villepinte, Parc des Expositions

Show Organizer:

IMEX MANAGEMENT INC.
505 East Boulevard, Suite 200
Charlotte, NC 28203
Tel: (704) 365 0041
Fax: (704) 365 8426
Email: sial@imexmgt.com
Internet: <http://www.sial.fr>
Contact: Francois Gros

End of Report

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Fax: (33-1) 43 12 2662
Email: agparis@fas.usda.gov
Internet: www.amb-usa.fr/fas/fas.htm

7. IMPORTERS/RETAILERS AND SUPERMARKETS OF KOSHER FOOD PRODUCTS**Importers/Distributors:****BORNIBUS**

201, rue Jules Ferry

T: 01 39 34 77 00

95360 MONTMAGNY

F: 01 30 34 77 48

(Condiments and mustards)

Contact: Mr. De Sousa, Mr. Barrie

CASIMEX/ETHNIC DELIGHTS

T: 01 44 74 17 37

Bercy Expo Show Room 6106

F: 01 44 74 17 38

40, avenue des Terroirs de France

75611 PARIS CEDEX 12

Contact: Sydney Knafou

E-mail: casimex@club-internet.fr**CEPASCO**

BP 125

T: 04 42 32 23 23

13381 GEMENOS CEDEX

F: 04 42 32 23 87

E-mail: spigol@spigol.com/cepasco@cepasco.comInternet: <http://www.spigol.com>

Contact: Jacques Dal Pra

FJORD KING

7, avenue Danville

T: 01 48 52 61 61

94600 CHOISY LE ROI

F: 01 48 52 72 34

Contact: Mr. Benabou

(Salmon)

INTER AGRO

516, rue de la Tour - Centra 250

T: 01 46 86 66 88

94576 RUNGIS CEDEX

F: 01 46 87 33 61

Contact: Alain Perez

LESIEUTRE & CIE

3, rue des Artisans

T: 04 77 70 57 96

42300 ROANNE

F: 04 77 70 03 47

Contact: Mr. Taieb

(Looking for CA kosher wines)

MEDIAL

56, boulevard du Capitaine Gèze
13014 MARSEILLE

T: 04 91 98 49 50
F: 04 91 58 11 48

Contact: Mr. Francis Cohen

Wholesaler that sells to the French retailers, and to supermarket chains, such as Casino, Leclerc and to Cash-Casher/Naouri. MEDIAL, created in 1978, is the kosher food pioneer in France.

OLIVES PROVENCE

Les Estroublans
15 Deuxième Avenue - Z.I.
13127 VITROLLES

T: 04 42 10 98 98
F: 04 42 10 98 97

Contact: Mr. Aziza

PASKSZ International bvba

Van Campenhoustraat 20
B-2600 Berchem (Antwerpen)

T: 00 32 2 230 78 92
F: 00 32 2 217 44 50

Contact: Mr. Perl
Commercial France

HENRI MOLKO

Mobile: 06 11 378606
F: 01 43 49 55 00

PRINCIANE

87, rue de Chezy
92200 NEUILLY SUR SEINE

T: 01 47 35 90 77
F: 01 47 35 93 67

&

1, rue de l'Egalite
92220 BAGNEUX

E-mail: princiane@princiane.com

Internet: <http://www.princiane.com>

Contact: Olivier Princ

Retailers and Supermarkets**CASH CASHER NAOURI**

26, boulevard Paul Vaillant Couturier
94200 IVRY SUR SEINE

T: 01 45 15 25 55
F: 01 45 15 25 50

Contact: Mr. Naouri

HYPERCASHER

52, rue de Paris
93800 Epinay sur Seine

T: 01 48 27 06 61
F: 01 48 27 02 46

89, rue de l'Ourcq

75019 Paris

Contact: Mr. Atlan

T: 01 42 09 90 88
F: 01 42 09 58 28

TRANS AMERICAN BROKERS FRANCE

45bis, rue du Sahel

75012 PARIS

Contact: Daniel Samet

T: 01 43 43 85 85
F: 01 43 43 96 97

DOUIEB

11, bis rue Geoffroy Marie

75009 PARIS

T: 01 47 70 86 09
F: 01 44 79 06 90

FRANCOIS

45, rue Richer

75009 PARIS

T: 01 47 70 17 43
F: None

LE HAIM

6, rue Paulin Enfert

75013 PARIS

T: 01 44 24 53 34
F: None

CHEKEL

14, avenue de Villiers

75017 PARIS

T: 01 48 88 94 97
F: 01 48 88 94 50

COMPTOIR PRODUITS ALIMENTAIRES

111, avenue de Villiers

75017 PARIS

T: 01 42 27 16 91
F: 01 42 27 83 00

LES AILES BOUTIQUE

15, rue des Fermiers

75017 PARIS

T: 01 44 15 93 93
F: 01 44 15 93 00

CHOCHANA

54, avenue Secrétan

75019 PARIS

T: 01 42 41 01 16
F: None

RIVIERA CACHER

11, avenue Villemont

06000 NICE

T: 04 93 92 92 00
F: 04 93 80 95 43

SUPER CASH COLBO

14, rue Michelet T: 04 93 52 15 15
06000 NICE F: 04 93 52 92 29

KGEL

11, rue Fricero T: 04 93 86 33 01
06000 NICE F: 04 93 44 91 78

MICKAEL

37, rue Dabray T: 04 93 88 81 23
06000 NICE F: 04 93 88 31 26

CANNES CACHER

10, rue Louis Braille T: 04 93 39 85 08
06400 CANNES F: None

YARDEN

3, rue Pinkmatt T: 03 88 22 49 76
67000 STRASBOURG F: None

YARDEN

13, bd de la Marne T: 03 88 60 10 10
67000 STRASBOURG F: None

LEVY

4, rue Strauss Durckheim T: 03 88 35 68 21
67000 STRASBOURG F: None

AVIEL CASH

28, rue St Suffren T/F: 04 91 37 95 25
13006 MARSEILLE

SUPERETTE EMMANUEL F.

93, avenue Clot Bey T: 04 91 77 46 02
13008 MARSEILLE F: 04 91 71 23 55

Z. CACHER

206, boulevard Paul Claudel T: 04 91 74 30 01
13009 MARSEILLE F: None

RAPHAEL CASH

299 avenue de la Madrague T: 04 91 76 44 13
13009 MARSEILLE F: None

KING CACHER
25, rue F. Mauriac
13010 MARSEILLE
T: 04 91 80 00 01
F: 04 91 79 99 38

TAIM VENAİM
Montee Sainte Menet
13011 MARSEILLE
T: 04 91 44 11 21
F: None

DELI CASH
94, bd Barry
13013 MARSEILLE
T: 04 91 06 39 04

EPICERIE DE l' ACİM
45, rue Proudhon
34000 MONTPELLIER
T: 04 67 02 10 99
F: 04 99 58 35 81

CACHER VILLEROY
32, rue Villeroy
69003 LYON
T: 04 78 71 72 22
F: None

LORICASH
140, rue Dedieu
69100 VILLEURBANNE
T: 04 78 03 24 79
F: 04 78 68 07 87

MAXICASH
44 Cours Tolstoi
69100 VILLEURBANNE
T: 04 78 85 00 80
F: 04 78 03 39 88

HRI

SERVAİR
4, place de Londres
95700 Roissy en France
T: 01 48 64 85 85
F: 01 48 64 85 17