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# **Report Name:** Retail Foods Annual

**Country:** France

**Post:** Paris

**Report Category:** Retail Foods

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**Report Highlights:**

In 2024 (the latest year with data available), the agri-food market in France was impacted by 2.5 inflation. This trend continued in 2025. Price increases most severely impacted the lower income strata of society and cut into their ability to purchase. Many consumers are moving away from big brands to less expensive distributor brands. At the same time, the food industry is adjusting to new environmental regulations that prioritize high value, high quality food that is produced and marketed more sustainably. New packaging laws are phasing out single-use plastics in favor of more recyclable materials. The French retail network is diverse and very sophisticated, offering a wide range of opportunities for U.S. food products provided they conform to French and EU regulations.

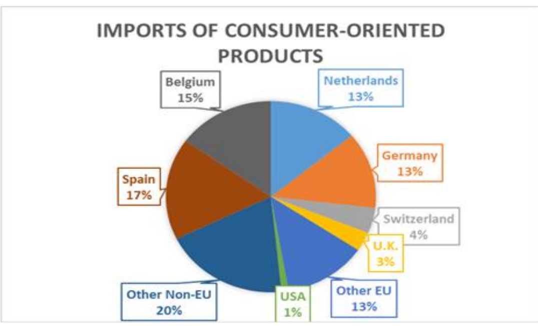
## Market Fact Sheet: France

### Executive Summary

In 2024, gross domestic product (GDP) was estimated at $3.162 trillion. France is the world's seventh largest economy and the second largest in the EU, endowed with substantial agricultural resources.

### Imports of Consumer-Oriented Products

Primary imports from outside the EU include oilseeds, fruit, and distilled spirits. Imports from the EU are primarily meat, dairy, and vegetables. France has a positive trade balance in agricultural and food products, reaching $16.6 billion in 2024. French imports from the United States reached $1.05 billion in 2024, led by seafood, tree nuts, soybeans and alcoholic beverages.




### Food Processing Industry

France’s food processing sector encompasses approximately 19,000 companies with total annual sales exceeding $176.7 billion. Small- and medium-sized enterprises (SMEs) account for almost 98 percent of the industry. It is the leading sector of the French economy with a strong reputation for quality and innovation.

### Food Retail Industry

In 2024, approximately 70 percent of all retail food sales in France were in the hyper-supermarket and discount store format. E-commerce food sales represent around 6 percent of total retail food sales.

### Food Service Industry

France’s HRI sector recorded $126 billion in sales revenue in 2024. Hotels and restaurants account for approximately 58 percent of sales, while institutional food service represents 20 percent.

### *Quick Facts CY 2024*

**Imports of Consumer-Oriented Products** *(USD billion)*: 53. This figure does not include U.S. products exported to France transshipped through other EU countries.

**List of Top 10 Growth Products in Host Country**

Seafood, almonds, peanuts, pistachios, grapefruit, sauces, pet food, food preparations, beer, wine, and whiskey.

**Food Industry by Channels (USD billion)**

| | |
|---|---|
| Food Industry Output | 176.7 |
| Food and Ag. Exports | 88.9 |
| Food and Ag. Imports | 72.3 |
| Retail | 258 |
| Food Service | 126 |

**Top 10 Host Country Retailers**

1. **Carrefour**
2. **Auchan**
3. **E. Leclerc**
4. **ITM Entreprises**
5. **Casino**
6. **Systeme U**
7. **Lidl**
8. **Cora**
9. **Aldi**
10. **Schiever**

**GDP/Population**

Population *(millions)*: 68.1
GDP *(trillions USD)*: 3.2
GDP per capita *(USD)*: 47,359
**Sources:** TDM, ANIA

| Strengths | Weaknesses |
|---|---|
| France is one of the largest consumer markets in Europe. | U.S. exporters face competition from EU FTA partners who benefit from tariff-free market access. |
| **Opportunities** | **Challenges** |
| A large food-processing industry seeking a wide range of ingredients. | Non-tariff barriers can complicate the process for exporting to France. |

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# I. MARKET SUMMARY

## Overall Market Summary

In 2024, the agri-food market in France was impacted by inflation, recorded at 2.5 percent, down from 5.7 percent in 2023. Inflation is projected to be at 1.7 percent in 2025 and 2026. This is due to lower inflation for food, energy and manufactured goods.

Economic activity grew at a moderate pace in 2024, by 0.8 percent, with food expenditures representing approximately 14 percent of the household budget. However, household consumption should benefit from the recovery in purchasing power driven by the fall in inflation. In 2025 and 2026, economic growth is expected to therefore strengthen to 1.2 percent and 1.6 percent, respectively. However, the price increases during the past three years impacted the most modest strata of society and cut into their ability to purchase. Food expenditures reached up to 30 percent of the budget of the most disadvantaged classes.

The concerns of French consumers about ecology, respect for the planet, and sustainable agriculture have taken a back seat, not for lack of interest, but because consumers are impacted by rising prices. This is confirmed by a decline in sales of organic products, which were already starting to run out of steam before the inflationary crisis. Consumers prefer locally produced products with which they can forge a more direct link with producers.

Consumers are moving away from big brands to less expensive distributor brands. In addition, the less favored social strata prefer to consume cheaper products of lesser quality. Price is the number one concern of the typical French consumer.

At the same time, the industry is also adjusting to new environmental regulations that prioritize high value, high quality food that is produced and marketed more sustainably. New packaging laws are phasing out single-use plastics in favor of more recyclable materials. Food nationalism is growing since the economic crisis began with messages of Buy French popular among government officials and the media. However, France relies on exports of agricultural products and enjoys a large surplus in their trade balance with exports such as wine and wheat where it is the leading EU exporter.

France’s retail distribution network is diverse and sophisticated. The food retail sector is generally comprised of six types of establishments: 1) hypermarkets, 2) supermarkets, 3) hard discounters, 4) convenience stores, 5) gourmet centers in department stores, 6) traditional outlets including neighborhood stores - bakeries and butcheries, and 7) gas marts, as well as open-air markets and internet sales. In 2024, sales within the first four categories represented 75 percent of the country’s retail food market. Over the last ten years, the largest French retailers invested in smaller stores in city centers. In 2024, food expenditure represented about 20 percent of the household budget, compared to 35 percent in 1960. The household food basket is now primarily composed of processed and ready-to-eat foods, while the demand for meat, fruits and vegetables, bread and alcoholic beverages has decreased. The decrease in household purchasing power, the fluctuation in food prices, and changing lifestyles have contributed to the changes in food habits.

Generally, hyper/supermarkets remain the most popular stores, but specialized food stores, frozen food stores, and hard discounters have increased their retail sector market share in recent years. Other trends of note are that French consumers are diversifying their purchases through several stores, for example buying some products locally and others from discount stores that may be farther from their residence. In addition, consumers are more price sensitive and demanding of high-quality products. Since the COVID crisis, the large retailers' emerging "drive-thru" service is on the rise. E-commerce continued growing in 2024 but at a lower scale, valued at $15 billion and representing 6 percent of the retail market. In addition, large retailers are expanding their private labels offered, as well as continuing to invest in smaller local stores. The retail sector is estimated at $258 billion. Hyper/supermarkets and hard discounters represent about $159 billion and $21 billion respectively; neighborhood stores, including traditional grocers, $29 billion; and specialized food stores such as frozen food stores, organics, and open-air markets, $34 billion.

**Key market drivers and consumption trends**

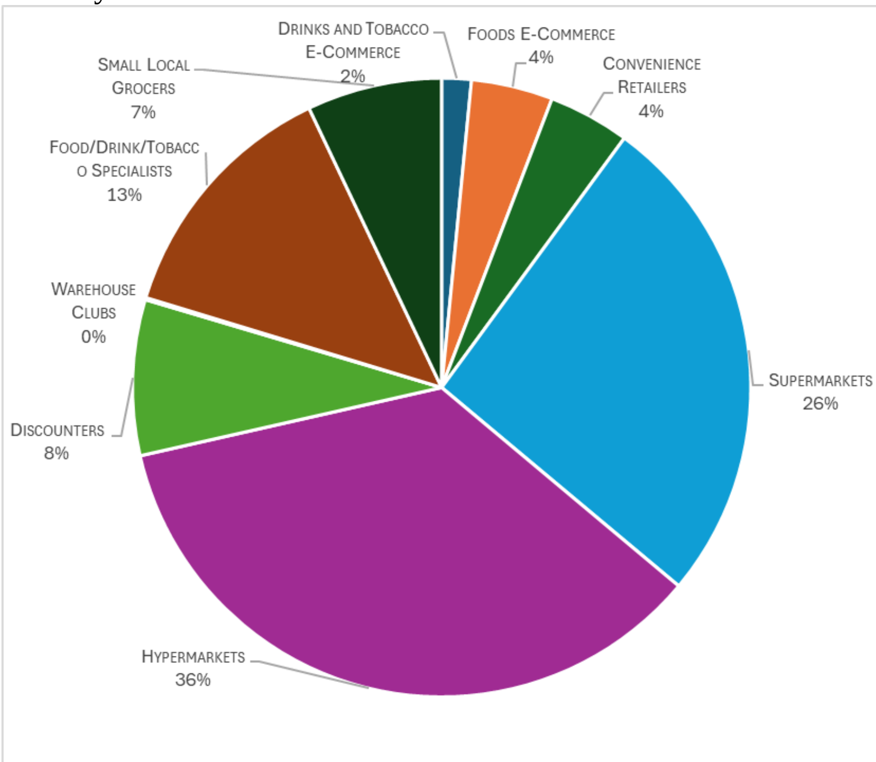
- More time spent working and the rising number of single households are driving the demand for convenient ready-to-eat meals, desserts, and baking mixes.
- The growing population and increased health consciousness of consumers is fueling the demand for health and wellness products, as well as functional food products.
- Fair trade and organic products are still popular. France is the second largest organic market in Europe.
- Ethnic foods, health and super foods, "free-from" products (e.g., gluten or lactose free), and locally grown are further trends that are attracting more and more French consumers.
- Increasing share of consumers who view their purchasing decision as political or life-style statements, such as no GMOs, free-range eggs, and vegetarian or vegan diet foods.
- Consumers increasingly require traceability and information about production methods.

**Table 1: Advantages and Challenges**

| Advantages | Challenges |
|---|---|
| A significant portion of French households can afford imported food products. | Lack of brand and variety awareness of U.S. food products by consumers. |
| The French food retail industry is looking for new imported food products. | Although of interest, introducing new-to-market brands and products is not easy. |
| American food and food products are increasingly popular in France. | Complying with European and French regulations. |
| Efficient domestic distribution systems. | Domestic and intra-EU imports dominate the supply chain. |
| French consumers demand quality, innovative, healthy products. | Adapting products to French consumers' tastes and expectations. |
| Changing lifestyles, demographic changes, and the economic crisis fuel growth in the hard discounters. | Adapting U.S. products to French consumer needs regarding price, practicality, variety, quality, and packaging. |

**Retail Sales by Channel**

Figure 1. Retail Market by Channel 2024




Source: Euromonitor

## II. Road Map for Market Entry

U.S. exporters can gain market entry to the retail service sector in several ways, including representation by an importer, having their products placed in a central purchasing office catalog, and by selling to cash and carry outlets. Food buyers use central buying offices, importers, and cash and carry dealers to procure their products. The most common method of market entry is by using an experienced importer to place your product in the French market. The importer will verify that your product meets EU import requirements, such as labeling and ingredient regulations and will verify your financial reliability. If interested, the importer will engage in price negotiations. Both suppliers and importers need to discuss logistical requirements and the length of the contract. FAS Paris maintains a list of importers; please email agparis@usda.gov and designate your company, state of production and sector of interest for more information. Importers often place your product in retail stores and with central purchasing offices. In France, it is common for large retailers to participate in a central purchasing office to share the costs of purchase and distributors. The central purchasing office buys products directly as well as from importers and distributors and provides them with retail outlets. You will find additional labeling rules on food allergens and nutritional products, packaging, container, food additives regulations and trade barriers at http://www.usda-eu.org/trade-with-the-eu/eu-import-rules/fairs-reports/

**Table 2: Major Food Related Trade Shows in France**

| Trade Show | Description | Location |
|---|---|---|
| **Wine Paris - Vinexpo**<br>February 9-11, 2026<br>https://www.vinexposium.com/en/wineparis-vinexpo/ https://wineparis.com/newfront | International trade show for wine and spirits | Paris |
| **Sandwich and Snack Show**<br>April 1-2, 2026<br>**Error! Hyperlink reference not valid.** | Trade show for snacks products | Paris |
| **SIAL (every two years) USDA endorsed**<br>October 17-21, 2026<br>erich@imexmanagement.com | Leading food fair for retail trade, food service, and catering market | Paris |
| **SIRHA**<br>January 21-25, 2027<br>https://www.sirha.com/en/ | World's largest trade show for food service | Lyon |

U.S. suppliers may also contact the following organizations for additional support:

**State Regional Trade Groups (SRTG)** are non-profit trade development organizations that help U.S. food producers and processors to enter overseas markets. They are funded by USDA/FAS and the private industry. They carry out promotional activities to increase exports of U.S. high-value food and agricultural products. For more information, contact the state regional trade group responsible for your state: https://www.fas.usda.gov/state-regional-trade-groups

The **U.S. Agricultural Export Development Council** is composed of U.S. commodity trade associations and other organizations, in addition to the SRTGs, with an interest in promoting U.S. agricultural exports. For an overview and additional information on the various Commodity Groups, you can go to www.usaedc.org. They regularly organizes (reverse) trade missions, often organized around trade shows or other events, utilizing the Regional Agricultural Promotion Program (RAPP). They also are excellent platforms for U.S. suppliers of food ingredients to meet with foreign buyers.

**Table 3: Profiles of Top Food Retailers**

| Retailer Name and Outlet Type | Ownership | World Sales in 2024 (billion USD) | Location | No. of Outlets (France) | Purchasing Agent Type |
|---|---|---|---|---|---|
| Carrefour (Hyper/Supermarkets, convenience stores) | French | 110.7 | France and foreign countries | 3,859 | Importers |
| E. Leclerc (Hyper/supermarkets, convenience stores) | French | 73 | France and Europe | 1,416 | Central Buying office |
| Intermarche/Les Mousquetaires (Supermarkets, hard discounter, and convenience stores) | French | 65.4 | France and foreign countries | 2,496 | Central Buying Office |
| Groupe Auchan (hyper/supermarkets, + convenience | French | 37 | France and foreign countries | 702 | Direct |

| | | | | | |
|---|---|---|---|---|---|
| stores) | | | | | |
| Groupe Casino (Hyper/supermarkets, hard discount + convenience stores) | French | 31.99 | France and foreign countries | 8,634 | Central Buying Office |
| Systeme U (Hyper/supermarkets and convenience stores) | French | 30 | France | 1,214 | Direct |
| Lidl (Hard discounter) | German | 18.8 (France) | France and Europe | 1,500 | Central Buying Office |
| Cora (Groupe Louis Delhaize) (Hyper/supermarkets) | French and Belgian | 7.7 (France) | France and Europe | 214 | Importers |
| Aldi (Hard discounter) | German | 4.7 (France) | France and foreign countries | 1,388 | Central Buying Office |

Source : Linéaires/Panorama Trade Dimensions 2024

**Major Retailers:**

1. **Carrefour**: After having been the world's second largest retailer after Walmart, and the largest in Europe for several years, the French group now ranks around tenth. Created in 1959 in southeast France, Carrefour grew rapidly into international markets with stores in 40 countries (Europe, Asia, South America, and North Africa). It is the second leading supermarket in France with 20 percent of the market share.
2. **E. Leclerc**: Since 2016, the company has remained the top retailer in France with over 21 percent of the market share. Most of its stores are hypermarkets with growing numbers of smaller formats and drives. Leclerc is present throughout Europe and sources food products through its central buying office.
3. **Intermarché**: This is a group of independent retailers with stores in Europe and foreign countries. Most of Intermarché's outlets are supermarkets. It accounts for 17 percent of the market share.
4. **Groupe Auchan**: This is a family company owned by the Mulliez family and the Schiever Group. Auchan is present in 12 countries. It represents 9 percent of the market share.
5. **Systeme U:** This is the fourth largest retailer in France in terms of sales with 12 percent of the market share. U brand private label expansion is a priority for products such as wine, fruit juices, frozen ready-to-eat foods, ethnic foods, and seafood.
6. **Groupe Casino**: It is present in France, with 6 percent of the market share, and in South America. Casino owns Monoprix, Franprix, Petit Casino, Casino Shop, Vival, Spar, and Chez Jean. Groupe Casino has been undergoing significant restructuring, including the sale of 366 hypermarkets and supermarkets and the closure of 768 points of sale in 2024.
7. **Cora**: The retailer is part of the Belgium group Louis Delhaize and has hypermarket/supermarket stores in France (2.4 percent of the market share) and Europe.
8. **Grand Frais**: This is a network of 316 small to medium sized stores with $2.5 billion in sales. It was created in the 1990s to offer consumers the best quality at moderate prices for fruits and vegetables, fish, world food groceries, butcher-delicatessen, and dairy products. Grand Frais works directly with importers.
9. **Costco:** In June 2017, the U.S. retailer inaugurated the first warehouse club in France, in Paris' suburb; a membership-fee discount concept was new to France. Given the success of this first French store that opened near Paris, a second store opened West of Paris mid-November 2021.

**Convenience Stores:**
Convenience stores fall under the category of small supermarkets (superettes), are generally located in small cities, and are frequently open every day (including Sunday). Within ten years, proxy/convenience stores increased by 40 percent, and in 2024, there were approximately 8,500 outlets affiliated with large retailers such as Carrefour, Casino and Intermarché. Their number is expected to continue rising in the coming years with more new concept stores.

**Other Types of Retailers:**
The number of smaller independent stores has slightly increased since 2002. Most of them are specialized food outlets (bakeries, butchers and fish shops, groceries), and they are located both in urban and rural areas. While the number of neighborhood stores in rural areas tend to decline, they have increased in urban areas. INSEE (French Institute of Statistics and Economic Studies) most recent census indicated 78,000 stores in the country. Their sales represent about 20 percent of the French food sales, and their products are sourced from wholesalers and wholesale markets. Customers of neighborhood stores are generally medium to high-class consumers.
Traditional grocers include gourmet stores, such La Grande Epicerie, and Galerie Gourmande, which carry a wide range of imported products. They are in large and medium-sized cities and attract high-income consumers. The approximately 200 outlets in France offer U.S. exporters easier market entry for products; their drawback is a tendency to purchase smaller quantities, and they work directly with importers.

Picard Surgelés is the leading frozen food retailer in France for home consumption, with a 20 percent market share, 1185 outlets throughout France, and sales in 2024 valued at $1.9 billion. Picard sells high-end frozen products and offers opportunities for U.S. suppliers of fish and seafood, frozen fruits and vegetables, fruit juices, and prepared specialty meals for their private label. Picard works directly with importers.

**III. Competition**

Most exporters within the EU conduct market promotion activities in France. Products such as fresh or preserved fruits and vegetables, wine, beer, fish, and meat are commonly promoted in trade shows, advertisements, and supermarkets. Third countries promoting food products in France include Norway, Israel, Morocco, South Africa, Argentina, Brazil, and Canada.

**Table 4: Overall Competitive Situation facing U.S. Suppliers, Calendar Year 2024**

| Product Category | 2024 Total Imports (in million dollars) | Average Percentage Market Share Change (2024-2023) | Key Constraints over Market Development | Market Attractiveness for USA |
|---|---|---|---|---|
| **HS 03. Fish and Seafood** | $189 | Plus 25% | Competition from other suppliers | The United States ranks 7th, far behind the U.K. and Norway, the major seafood suppliers; however, health benefits and quality of U.S. products offer opportunities for |

| | | | | |
|---|---|---|---|---|
| | | | | U.S. suppliers primarily for frozen Alaska Pollock fillets, fresh and frozen scallops, frozen surimi base, live lobster, and frozen salmon. |
| **HS 08. Fruits and nuts** | $183 | Plus 10.05% | Competition from key established suppliers | U.S. products are considered as safe, high-quality poducts. France is the leading European market for U.S. grapefruits; however, sales are impacted by high prices. The most popular nuts sold in France are almonds and pistachios. Most sales from the U.S. are bulk and for the processing industry. |
| **Distilled Spirits** | $136 | Plus 5.63% | Competition from local production and imports from European countries. High Tariffs on hard alcohol. | U.S. whisky and bourbon are considered quality products; opportunities exist, but high tariffs have a negative impact on sales. |
| **Wine** | $96.7 | Minus 1% | Competition from domestic production and imports from European countries | The market remains a niche for U.S. suppliers, but opportunities exist to compete with other countries present in the market for quality wine. |

Source: Global Trade Atlas /French Customs

## IV. Best Product Prospects

**Products identified as opportunities for U.S. Suppliers**

- Fish and seafood: salmon, cod, lobster, scallops. Please see Fish and Seafood report for more information
- Citrus fruits and Nuts: grapefruit, almonds, pistachios, and other nuts
- Salted and sweet snacks, confectionary products
- Spices, sauces, seasoning
- Wine and other alcoholic beverages
- Carbonated drinks, juices
- Pulses
- Canned fruit/vegetables, marmalade

.

**Products not present in significant quantities but that have good sales potential**

- Organic foods, 0.8 percent growth and market valued at USD 13.6 billion
- Halal foods, 7 percent estimated annual growth and market estimated at USD 8.5 billion
- Energy drinks, 8 percent estimated annual growth and market estimated at USD 1.2 billion
- Kosher foods, 8 percent estimated annual growth and market estimated at USD 0.6 billion

**Products not present because they face significant trade barriers**

- Vitamin-enriched flour.
- Meat products with hormones,
- Poultry products.
- Biotech-derived products that are not approved in the EU.

For more information on product trade restrictions within the European Union, please refer to U.S./EU Mission Food and Agricultural Import Regulation and Standards Report (FAIRS).

## V. Post Contact and Further Information

If you have any questions or comments regarding this report, need assistance exporting to France or desire French buyers contact lists, please get in touch with the U.S. Agricultural Affairs Office in Paris:

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**Attachments:**

No Attachments