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France

U.S. EXPORTER GUIDE

1999

Prepared by:
Frank J. Piason
U.S. Embassy
Drafted by:
Roselyne Gauthier

Report Highlights:
With a real growth domestic product (GDP) increase of 3.3 percent in 1998, and on-going socio-economic and demographic changes, France offers niche market opportunities for U.S. exporters in a wide range of products. However, the strong dollar, which has put some pressure on U.S. exports to the EU over the last year, continues to weigh against significant sales increases for U.S. products.

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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STATISTICS:

Note: Average exchange rate used in this report for calendar year 1998 is
US Dollar 1 = FF 5.75 (Source: IFM)

SECTION I. MARKET OVERVIEW

1. Macroeconomic Situation

According to the French Institute for Statistics (INSEE), in 1998 French real gross domestic product (GDP) grew by 3.3 percent in real terms, the most significant growth in 10 years and a marked improvement over 2.1 percent real growth in 1997. Inflation remained low and under control. Stronger growth also led to a lower unemployment rate of 11.5 percent by the end of the year. The outlook for 1999 and 2000 is for continued growth, although at rates below that of 1998. The Government projects growth in the range of 2.7 percent in 1999.

Most observers believe that despite its positive short-term prospects the French economy is operating below its long-term potential. Reaching that potential will require further deregulation and less state intervention in the economy. Progress has been made in privatizing state firms and reducing budget deficits, but taxes remain the highest in the G-7 industrial countries and regulation of goods and labor markets is pervasive as ever. The economic impact of the transition to the 35-hour workweek which will take effect on January 1, 2000 will depend on the outcome of negotiations over wages and work schedules that are scheduled to conclude by the end of 1999. France’s adoption of the euro will raise competitive pressures on French companies and on the French economy.

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

Overall household food and beverage consumption increased by 3.5 percent during 1998. While consumption of baby foods, fruit juices, mineral water and soft drinks, fresh ready-to-eat products, prepared dishes, dairy products, soups, canned and frozen vegetables, canned fish, pastry/confectionery and dietetic products increased the most, that of meat, butter, margarine and oils, coffee and tea, sugar and alcoholic beverages decreased.

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	58.2	15.1	34.2	8.9
1997	58.5	15.2	34.3	9.0
1998	58.7	15.1	34.4	9.2
1999 (P)	58.9	15.1	34.5	9.3

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	24.0

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:

– Consumers who are employed (currently 30 percent of the total population) or are 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 crisis has 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 and fish and seafood products–and for food supplements.

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 nearing 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 stringent 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. 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 additioanl 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 WTO 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 and frozen desserts 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 GMO's or GMO-derived ingredients or additives are being worked out at the EU level.

The French government has taken steps to improve food quality and 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.

Recently the press conducted a poll 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 ($44,000) 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 20.6 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 one of the French economy's most important sectors. Accounting for15 percent of the economy's added value, it is the country's leading added value sector. It is also the world's most competitive player with 10 percent of the world's market share.

- France has currently 23 major food processors, and over 4,200 food industry companies.

- According the French Food Industry Association (ANIA), in 1998 the food processing sector accounted for almost 45 percent of total processed food sales estimated at $139 billion, an increase of 1.4 percent from the 1997 level. This makes the French food processing industry number two in Europe behind Germany.

- In 1998, 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 1998: FF 232 billion ($40 billion), 0.5 percent decrease over 1997. The French food industry is the world's largest exporter of processed products with about 10 percent of the global market.

- Total Imports in 1998: FF 172 billion ($30 billion), 4 percent increase over 1997.

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

	Volume % Growth 1998/97	Price % Growth 1998/97	1998 Value (In billion $)
Meat industry	1.0	-5.8	33.1
Milk industry	2.0	-0.9	18.6
Beverages industry	2.1	1.9	15.8
Cereals and animal feed	1.3	-4.5	13.6
Other food industry	0.2	2.0	42.9
- Preserves, prepared fruits and vegetables	1.0	3.7	8.0
- Fats and Oils	-0.6	4.9	2.4
- Bread and pastries	0.1	0.6	14.2
- Sugar	-9.0	-3.4	3.5
- Miscellaneous (1)	2.5	3.3	14.7
Tobacco Industry	0.5	0.9	1.1
TOTAL FOOD INDUSTRY	1.0	-1.3	125.0

(*) Wine production is not included
(1) Chocolate, beverage preparations, infant foods, deserts and preserves
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 the Satolas airport in Lyon. France has twelve major seaports, many of which are equipped for container ships. There are also 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 easily accessed and provides many consumer services.

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 (FR9081).

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 will be soon available 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 showed a rising demand.

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: **FRESH AND DRIED FRUITS, INCLUDING NUTS**
   Commodity Code Number: HS 08

	1996 (Jan-Dec)	1997	1998
A. Total Market Size	3,992	3,286	3,870
B. Local Production	2,760	2,309	2,757
C. Total Exports	1,497	1,496	1,424
D. Total Imports	2,729	2,473	2,537
E. Total Imports from U.S.	143	128	138
F. Exchange Rate: USD 1.00 =	FF 5.11	FF 5.83	FF 5.75

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: France is one of the most important markets for U.S. grapefruit (mostly from Florida), valued at FF 160 million ($28 million) in 1998, as well as apples and pears (in short crops). There is also a niche market for berries, cherries and tangerines. In 1998, U.S. fresh fruit exports to France were valued at FF 206 million ($36 million). Off-season and extended-season sales, as well as years of short French fruit crops, represent the best opportunities for U.S. suppliers.

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 China and India provided the bulk of shelled imports. The snack and nut product niche market is important for U.S. exporters, who should promote their products as healthy and high-quality.

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

	1996 (Jan-Dec)	1997	1998
A. Total Market Size	3,399	2,817	2,750
B. Local Production	1,799	1,369	1,015
C. Total Exports	816	882	903
D. Total Imports	2,416	2,330	2,638
E. Total Imports from U.S	101	68	107
F. Exchange Rate: USD 1.00 =	FF 5.11	FF 5.83	FF 5.75

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: France has one of the highest per capita rates of consumption of seafood in Europe, approximately 21 kg per year (whole fish weight equivalent), and a market size of $2.7 billion. Sixty-seven percent of sales in France are through supermarkets. Among fish and seafood products, fish fillets and ready-to-eat seafood products sell the best. In 1998, French demand for lobster, scallops, and fresh packed fish increased and provides a potential niche market. The best selling fish in France are salmon, cod and shrimp.

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. U.S. seafood exports to France are mostly dogfish (75 percent of total French imports); monkfish (38 percent); lobsters (21 percent); and fish roe (18 percent). Imports of U.S. salmon slightly decreased in 1998 to the advantage of Norwegian salmon. 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.

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

	1996 (Jan-Dec)	1997	1998
A. Total Market Size	5,991	5,979	6,276
B. Local Production	5,219	5,278	5,499
C. Total Exports	1,052	952	982
D. Total Imports	1,824	1,653	1,759
E. Total Imports from U.S.	52	68	81
F. Exchange Rate: USD 1.00 =	FF 5.11	FF 5.83	FF 5.75

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 of 16 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 1998, French imports totaled about FF 3 billion ($0.5 billion). Imports from the United States mostly consist of fresh and frozen orange and grapefruit juices and amounted to FF 405 million ($70 million) in 1998, an increase of 20 percent over the previous year. Competition is very strong principally from Brazil, Israel and Spain, which benefit from preferential tariffs.

4. 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

	1996 (Jan-Dec)	1997	1998
A. Total Market Size	12,055	9,172	8,928
B. Local Production	18,756	16,026	16,156
C. Total Exports	8,468	8,473	9,000
D. Total Imports	1,767	1,619	1,772
E. Total Imports from U.S.	52	37	43
F. Exchange Rate: USD 1.00 =	FF 5.11	FF 5.83	FF 5.75

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: French imports of U.S. wine totaled FF 47 million ($8 million) in 1998, representing 2 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 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 sales in France increased 30 percent in 1998, over 1997, with total sales estimated at FF 172 million ($30 million).

Currently, the French beer industry consists of 25 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 is 39 liters. 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).

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

	1996 (Jan-Dec)	1997	1998
A. Total Market Size	4,273	4,795	5,534
B. Local Production	4,892	5,523	6,030
C. Total Exports	3,928	3,710	3,368
D. Total Imports	3,309	2,982	2,872
E. Total Imports from U.S.	52	34	29
F. Exchange Rate: USD 1.00 =	FF 5.11	FF 5.83	FF 5.75

Source: French Customs/SCEES - French Ministry of Agriculture

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

	1996 (Jan-Dec)	1997	1998
A. Total Market Size	N/A	4,060	3,375
B. Local Production	N/A	3,801	3,216
C. Total Exports	N/A	1,147	1,340
D. Total Imports	N/A	1,406	1,499
E. Total Imports from U.S.	N/A	27	29
F. Exchange Rate: USD 1.00 =	FF 5.11	FF 5.83	FF 5.75

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.

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: fasparis@compuserve.com
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 1999/2001

PARIS HORSE SHOW
Paris-Porte de Versailles
December 4-12, 1999
Organizer: Comite des Expositions de Paris
Tel: (33-1) 49 09 6482
Fax: (33-1) 49 09 6003
Internet: http://www.comite-expo-paris.asso.fr/E-mail: events@comite-expo-paris.assoc.fr
Annual Show

International Horse, Poney & Donkey Show

SALON INTERNATIONAL DU VEGETAL
Parc des Expositions Angers
February 16-17-18, 2000
Organizer: BHR Centre Regional Horticole
Tel: (33-2) 41 79 1417
Fax: (33-2) 41 79 2929
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 27 - March 5, 2000
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

PREMIERE VISION
Paris-Nord Villepinte
March 3-5, 2000
Organizer: Premiére Vision Le Salon
Tel: (33-4) 72 60 6500
Fax: (33-4) 72 60 6509
E-mail: info@premierevision.fr
Held every sixth months

International Cotton & Textile Show

FLORISSIMO 2000 — International Flowers, Plants & Tropical Products Show
Palais des Congres Dijon
March 10-20, 2000
Organizer: Parc des Expositions et Congres de Dijon
Tel: (33-3) 80 77 3900
Fax: (33-3) 80 773939
Email: Congrexpodijon@wanadoo.fr - Periodicity: Every three years

FOIRE INTERNATIONALE DE LYON — International Food, Beverages & and Tourism Fair
Lyon - Eurexpo
March 17-27, 2000
Organizer: SEPELCOM
Tel: (33-4) 72 22 3264
Fax: (33-4) 72 22 3282
E-mail: foire@sepelcom.com
Annual Fair

FOIRE INTERNATIONALE DE PARIS — International Food, Beverages & Tourism Fair
Paris Porte de Versailles
April 26 - May 8, 2000
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
Annual Fair

FOIRE INTERNATIONALE DE BORDEAUX — International Food & Beverages Fair
Bordeaux Lac
May 27 - June 7, 2000
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

ETHNIC FOOD SHOW — International Ethnic & Specialty Foods
Bercy-Expo, Paris
June 20-21-22, 2000
Organizer: Bercy-Expo
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 1-11, 2000
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 Carrefour Europeen - Rennes September 12-15, 2000 Organizer: SPACE Tel: (33-2) 99 67 1020 Fax: (33-2) 99 67 7845 Internet: www.space.fr Annual Show	International Livestock Production Show
FOIRE INTERNATIONALE DE CAEN Caen Exhibition Center September 15-25, 2000 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
FOIRE INTERNATIONALE DE MARSEILLE Parc des Expositions Marseille September 22 - October 2, 2000 Organizer: SAFIM ORGANISATION Tel: (33-4) 91 76 1600 Fax: (33-4) 91 22 1645 E-mail/Internet: None Annual Fair	International Food, Beverages & Tourism Fair
PREMIERE VISION Paris-Nord Villepinte October 5-8, 2000 Organizer: Première Vision Le Salon Tel: (33-4) 72 60 6500 Fax: (33-4) 72 60 6509 E-mail: info@premierevision.fr Internet: www.premierevision.fr Held every six-months	International Cotton & Textile Show
SIAL 2000	International Food Products

Paris-Nord Villepinte October 22-26, 2000 (FAS/Washington sponsorizes an American Food Pavilion) Organizer: CEP Exposium Tel: (33-1) 49 68 5498 Fax: (33-1) 47 31 3775 Internet: http://www.sial.fr - Biennial Show	Show
FOIRE INTERNATIONALE DE DIJON November 1-11, 2000 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
DIETEXPO/FILABIO Paris, Porte de Versailles October 20-22, 2001 Organizer: OIP Reed Tel: (33-1) 41 90 4760 Fax: (33-1) 41 90 4769 Internet:http://dietexpo.reed-oip.fr E-mail: dietexpo@reed-oip.fr Biennial Exhibition	International Health/Dietetic Organic Show
BATIMAT Paris, Porte de Versailles November, 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

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: Evelina (Vel) D. Vengco, Acting 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)
Ministére 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 1998

AgImports from All Countries (1)	$31,543 million	
U.S. Market Share (1)	3.1 percent	
Consumer Food Imports from All Countries (1)	$23,740 million	
U.S. Market Share (1)	2.0 percent	
Edible Fishery Imports from All Countries (1)	$ 3,430 million	
U.S. Market Share (1)	2.5 percent	
Total Population/Annual Growth Rate	60.2 million	0.4 percent (Nov. 1999)
Urban Population (2) /Annual Growth Rate	42.5 million	N/A
Number of Metropolitan Areas (3)	4	
Size of the Middle Class (4)	85 percent of total population	
Per Capita Gross Domestic Product	$24,873 (1998)	
Unemployment Rate	11.8 percent (1998)	
Percent of Female Population Employed (5)	47.9 percent (Jan 99)	
Exchange Rate: US$1 = FF 5.90		

Footnotes

(1) French Customs Statistics
(2) 1995 (last figure available)
(3) Population in excess of 1,000,000
(4) 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
(5) Percent against total number of women (15 years old or above)

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)	**1996**	**1997**	**1998**	**1996**	**1997**	**1998**	**1996**	**1997**	**1998**
CONSUMER-ORIENTED AGRICULTURAL TOTAL	18,078	16,808	17,536	337	347	362	2	2	2
Snack Foods (Excl. Nuts)	1,634	1,501	1,542	3	4	5	0	0	0
Breakfast Cereals & Pancake Mix	193	200	180	1	3	6	0	1	3
Red Meats, Fresh/Chilled/Frozen	2,768	2,430	2,331	50	34	28	2	1	1
Red Meats, Prepared/Preserved	519	471	467	1	1	1	0	0	0
Poultry Meat	285	285	280	1	1	1	0	0	0
Dairy Products (Excl. Cheese)	1,378	1,374	1,564	5	3	1	0	0	0
Cheese	729	636	682	1	2	1	0	0	0
Eggs & Products	119	99	85	1	1	1	1	1	2
Fresh Fruit	2,175	2,000	2,038	43	42	35	2	2	2
Fresh Vegetables	1,158	1,020	1,111	5	4	2	0	0	0
Processed Fruit & Vegetables	1,785	1,636	1,757	32	21	22	2	1	1
Fruit & Vegetable Juices	560	511	543	32	57	69	6	11	13
Tree Nuts	285	307	300	97	81	79	34	26	26
Wine & Beer	845	811	906	6	8	9	1	1	1
Nursery Products & Cut Flowers	851	816	888	1	2	2	0	0	0
Pet Foods (Dog & Cat Food)	160	169	151	22	11	10	14	6	6
Other Consumer-Oriented Products	2,636	2,539	2,711	38	75	91	1	3	3
FISH & SEAFOOD PRODUCTS	3,231	3,030	3,434	108	106	114	3	3	3
Salmon	398	357	374	25	28	14	6	8	4
Surimi	37	37	50	6	11	16	16	29	32
Crustaceans	838	785	912	26	19	24	3	2	3
Groundfish & Flatfish	695	673	804	26	24	31	4	4	4
Molluscs	260	264	302	2	6	7	1	2	2
Other Fishery Products	1,002	914	992	23	18	22	2	2	2
AGRICULTURAL PRODUCTS TOTAL	**26,330**	**24,670**	**25,008**	**785**	**797**	**832**	**3**	**3**	**3**
AGRICULTURAL, FISH & FORESTRY TOTAL	**31,728**	**29,853**	**30,737**	**1,003**	**995**	**1,048**	**3**	**3**	**3**
Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office									

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

CONSUMER-ORIENTED AGRICULTURAL TOTAL - 400					**FISH & SEAFOOD PRODUCTS - 700**			
France	**Import**	**Import**	**Import**		**France**	**Import**	**Import**	**Import**
	1996	**1997**	**1998**			**1996**	**1997**	**1998**
	Value	Value	Value			Value	Value	Value
	1000$	1000$	1000$			1000$	1000$	1000$
United States	337,430	347,214	362,221		United States	107,814	105,587	114,209
Netherlands	2,669,433	2,328,892	2,508,695		Norway	317,737	306,967	320,177
Spain	2,321,638	2,271,899	2,417,405		Cote d'Ivoire	221,279	188,799	216,587
Germany	2,317,246	2,061,383	2,168,985		Spain	135,937	155,546	184,072
Italy	1,727,523	1,559,000	1,622,696		Denmark	225,031	178,799	182,180
United Kingdom	1,281,449	1,181,984	1,162,512		Netherlands	193,454	163,765	168,309
Ireland	490,756	482,470	541,272		Iceland	109,204	98,951	125,526
Denmark	560,615	513,598	397,490		Germany	114,992	99,591	117,446
Morocco	447,444	345,542	379,288		Thailand	136,762	102,396	116,180
Switzerland	234,214	209,733	219,941		Belgium	80,282	89,516	105,563
Israel	205,684	175,525	213,204		Senegal	97,575	92,289	104,431
Portugal	217,889	204,744	205,071		Ecuador	91,594	102,563	102,936
Turkey	160,123	179,175	191,956		Madagascar	66,437	60,993	96,345
Cote d'Ivoire	189,597	202,847	185,263		Ireland	84,494	77,742	88,865
Other	2,117,790	2,144,721	2,210,478		Other	814,735	814,043	981,507
World	**18,078,387**	**16,808,202**	**17,535,738**		**World**	**3,230,587**	**3,029,674**	**3,434,418**
